Circulation hold workflow

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Find an overview and flowchart describing the hold workflow in WorldShare Circulation.
Circulation hold flowchart
Common hold workflows

Patron requests item owned by branch A for pickup at branch A (See green part of flowchart)

1. Patron requests hold on item owned by branch A for pickup at branch A.
2. If a copy of item is available, it appears on branch A’s Pull List.
3. Staff uses Pull List to retrieve item from the stacks.
4. Staff checks in the item (if WMS says to reshelve the item, the hold request was filled by another branch or was canceled). WMS prints Hold Slip (if no printer, staff retrieve item record to see patron requesting hold and manually create hold slip).
5. Staff place item on Hold shelf.
6. Patron notified via email that item is available for pickup.
7. When patron arrives, staff checks out item to patron.

Patron requests item owned by branch B for pickup at branch A (See blue part of flowchart)

1. Patron requests item owned by branch B for pickup at branch A.
2. If a copy of item is available, it appears on branch B’s Pull List.
3. Branch B staff uses Pull List to retrieve item from stacks.
4. Branch B staff checks in item (if WMS says to reshelve the item, the hold request was filled by another branch or was canceled).
5. WMS prints Routing Slip and tells staff to route item to branch A (if no printer, manually create routing slip).
6. Item sent to branch A.
7. When item arrives at branch A, staff checks in item.
8. WMS prints Hold Slip (if no printer, staff retrieve item record to see patron requesting hold and manually create hold slip).
9. Staff place item on Hold shelf.
10. Patron notified via email that item is available for pickup.
11. When patron arrives, item is checked out to patron.
12. When patron returns item to branch A, staff checks it in. WMS prints Routing Slip and tells staff to route item to branch B (if no printer, manually create routing slip).
13. Item sent to branch B.
14. When item arrives at branch B, staff checks in item.

Unavailable items (checked out or in transit when hold is requested (See red part of flowchart)

1. Patron or librarian requests a hold on an item, but it’s checked out to another patron.
2. When the item is returned, staff checks it in. The Action column on the check in screen says "Hold."
3. WMS prints Hold Slip and tells staff to place item on Hold shelf (if no printer, staff retrieve item record to see patron requesting hold and manually create hold slip).
   Note: In this situation, the item never appears on a Pull List, so if staff don’t have a receipt printer (which automatically prints hold slips), and are checking in multiple items, they can easily miss the one item whose status changes to On Hold upon check in (which triggers notification of patron, who expects to pick up item, but staff have reshelved it, instead of putting it on the hold shelf).

4. Patron notified via email that item is available for pickup.

5. When patron arrives, staff checks out item to patron.

Check in special requests

1. In the left panel, click Check In.

2. Enter the system generated barcode and click Check In.

3. On the Temporary Item (Special Request) window, click Edit to change the system generated barcode.

4. In the Temporary Barcode field, enter the barcode of the item that will fulfill the hold request.
   ◦ The barcode entered needs to be in your library's holdings.
   Note: The Temporary Item's Shelving Location must match the Shelving Location of the requested item.

5. Click Go.

6. On the Confirm item for Hold Request window, click Yes to link the item to the hold request.

7. Depending on your account, you may have to enter an override. To place the hold, on the Temporary Item window, click Acknowledge. See Circulation account roles, Overrides for more information.