

Holds

PINES patrons may place holds on most books and audiovisual materials owned by any PINES library, as well as on certain additional types of materials within their own local library system. Items which are placed on hold will be delivered via courier from the owning library to the patron's desired pickup library.

Note: Prior to March 1, 2022, holds on audiovisual materials were restricted to pickup at their owning library systems. [2021.12]

Circulation periods and allowed renewals are standardized across PINES libraries, but some types of materials have several different circulation options which are set by their owning libraries (see the [Circulation Matrix](#) for details). When thinking of intra-PINES lending, it is important to remember that a PINES patron is a patron exactly like your local patron. Intra-PINES loans are not ILLs - they are simply circulations like any other. The PINES Executive Committee has ruled that circulations between PINES libraries must be free of charge to system libraries and to patrons [2008.09].

The vision of the PINES statewide library card included as a key component the ability for patrons to see and borrow library materials from all participating public libraries in the state. Our goal is maximum access for all patrons, while realistically addressing the logistics of moving materials around the state. Member libraries have agreed that PINES membership would not relieve libraries of the responsibility for purchasing the materials needed to meet the demands of local patrons.

Staff must never give preference to one patron over another regarding holds. The [PINES Code of Ethics](#) requires that all libraries respect the integrity of the hold queue, and share equitably.

Hold Types or Levels

There are five levels or types of holds that can be placed in Evergreen. Library staff can place holds at all levels. Patrons can place title, metaholds, or part level holds. Only staff can place item/copy and call number/volume level holds.

Title level holds (T)

Designated by a T, title holds are placed on a single title/bibliographic record and can be filled by any copy in a holdable state on that record. Patrons and library staff can place title level from either the staff catalog or patron OPAC.

Part level holds (P)

Designated by a P, part level holds are placed when a specific volume or part of a multi-part work is needed. Parts are chosen at the time the hold is placed from a dropdown menu and apply to any volume or call number from any library with the same part label attached to the title record. Part level holds can

be placed by either patron or library staff from either the staff catalog or patron OPAC.

Item/Copy level holds (C)

Designated by a C, Item/copy level holds are placed on a specific item on a bibliographic record and can only be filled by that specific item. Item/Copy holds should only be used by catalogers when they need to resolve a cataloging problem. Item level holds placed for patrons can negatively impact hold fulfillment and should not be used for patron holds. Item level holds can only be placed by library staff from the staff catalog.

Call Number/Volume level holds (V)

Designated by a V, call number/volume level holds are used when any item attached to a specific library's call number or volume is needed. Call number/volume level holds should be rare since there are few occasions where a title or part level hold would not be a better option. Call number/volume level holds may also negatively impact hold fulfillment since the targetter will not look beyond that specific call number. Volume level holds can only be placed by library staff within the staff catalog.

Metarecord holds (M)

Designated by an M, metaholds are used when a patron will accept the first available copy of any format of a title, or any language available for a title. Placing a metahold groups titles together for hold availability using a machine-based algorithm that identifies like titles. Holds are not placed on all records in the group; but, will be fulfilled with the first available copy on one of the grouped records. At hold placement, patrons or staff can choose format and/or language under advanced options. Metaholds can be for all formats for the grouped records, only book formats (regular or large print) or editions, only sound recording formats, or only visual material formats. Metaholds can be placed by patron or library staff from either the staff catalog or patron OPAC.

Placing Holds

- Patrons may place their own holds via the OPAC, and may select their pickup location and notification method. The software will refuse holds requests which do not conform to PINES policies. Patrons may choose any pickup location for holds. Patrons may not place multiple holds on a single title record, but staff may place multiple holds on a single title record for specific purposes (e.g., for a book club) [2006.05].
- Patrons whose PINES cards are expired will not be allowed to place holds until the card privilege is renewed.
- Most patrons may place 50 holds at any given time on their account [2006.11]. Certain user categories are restricted to different number of holds limits.
- If a patron presents the on-hold item for checkout before it is retrieved for the requesting patron, the in-house patron with item in hand receives preference; a circulation supervisor will override the

hold and check out the item to the in-house patron. The requesting patron will be next in line for the item.

- Hold requests expire after 6 months with the option for staff or patron to make it an earlier or later date [2008.02].

Pulling Holds

An automated process (the holds targeter) runs periodically and identifies copies of items at PINES libraries that can fulfill holds.

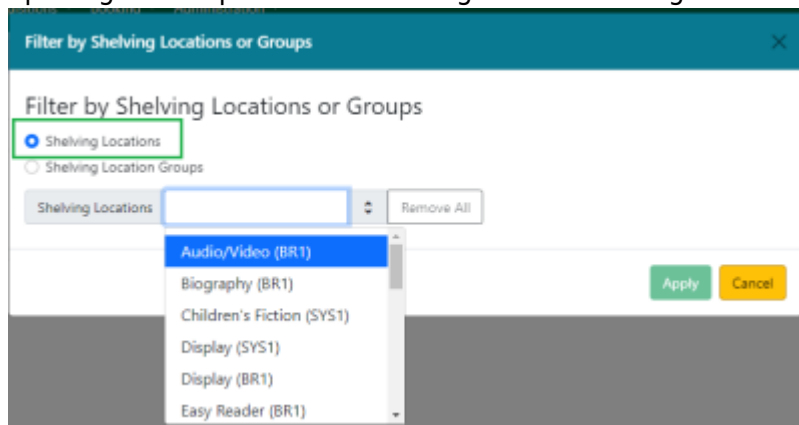
Each weekday (M-F) morning, each PINES library location will print a report (the Holds Pull List) of items on their shelves which have hold requests. To access the **Holds Pull List**, you can either click the link at the bottom of the **Circulation and Patrons** section on the main staff client splash page, or go to **Circulation > Pull List for Hold Requests**.

As of the 3.12 upgrade, there are three ways you can filter the pull list: circulation library, pickup library, and shelving location.

The **Circulation Library** filter (designated by “View Pull List For”) will default to your workstation. You can change the library location by clicking in the field and choosing an option from the dropdown menu. The **Pickup Library** filter works the same as the circulating library filter. To remove the Pickup Library filter, click **Clear** next to the Pickup Library field.

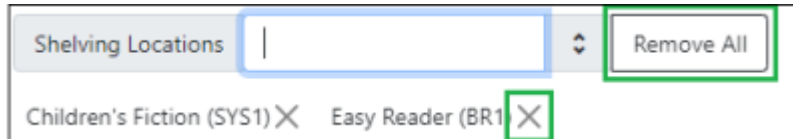
To add **Shelving Location** filters:

1. Click anywhere in the **Shelving Location** box to bring up the filter pop-up window.
2. Make sure **Shelving Locations** is selected (this is the default), click in the **Shelving Locations** box, and click on the shelving location in the dropdown. You can add multiple shelving locations by opening the dropdown and clicking on the shelving location name.

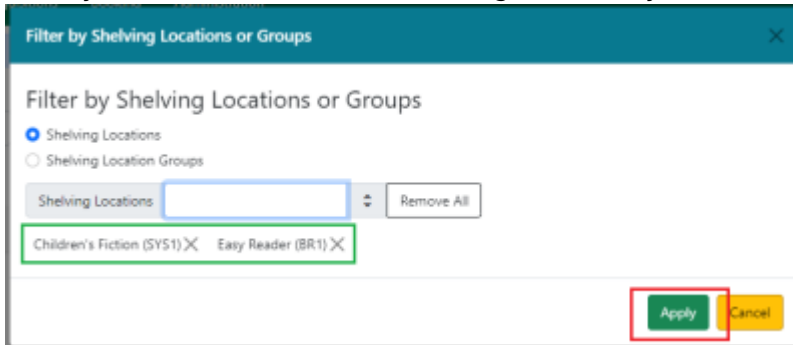


3. Once you have chosen the necessary shelving locations, you can remove any individually by

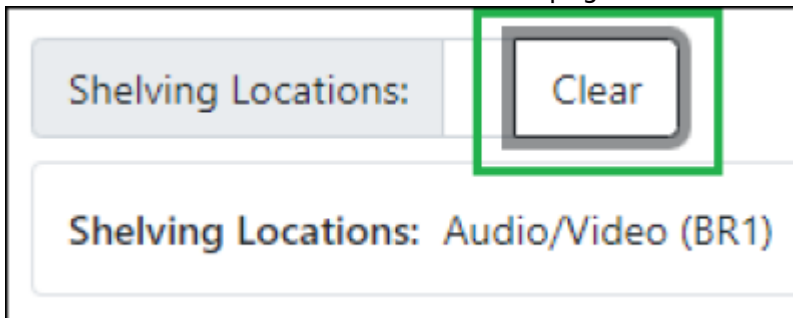
clicking the **X** next to the shelving location name, or you can click **Remove All** to clear all selections at one time.



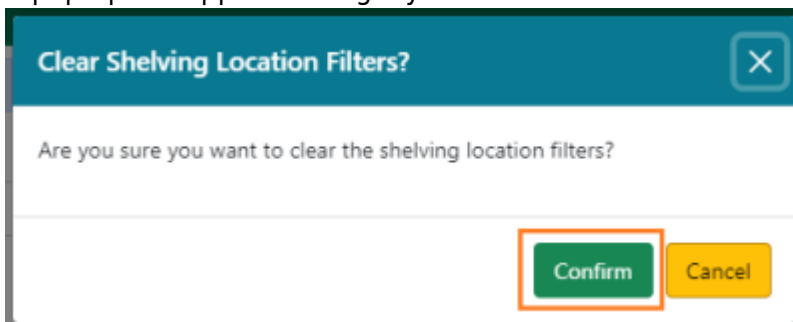
4. Once you have chosen which shelving locations you'd like to filter by, click **Apply**.



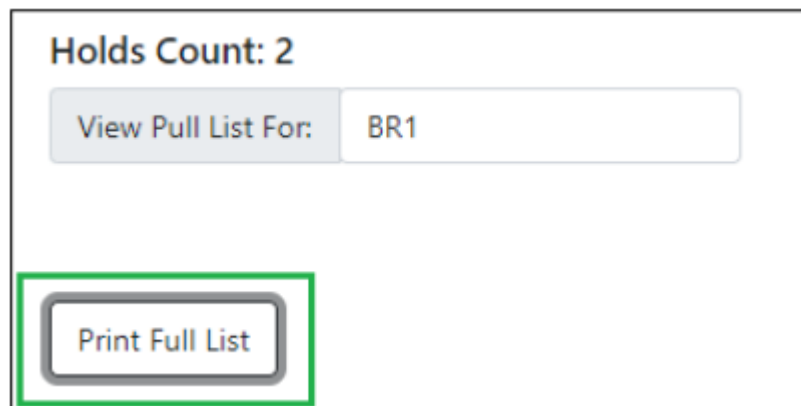
5. To clear shelving locations filters, click on the filter to delete them individually (step 3 above), or click **Clear** next to the filter on the main page.



6. A pop-up will appear asking if you'd like to clear the shelving location filter(s). Click **Confirm**.



Once you've selected your filters, you can print the list by clicking **Print Full List**.



Holds Count: 2

View Pull List For: BR1

Print Full List

The items on this list should be retrieved from the shelves and processed within 24 hours.

If an item should be on the shelf but cannot be found, mark the item Missing (Circulation > Item Status > Scan Barcode > Actions > Mark Item as Missing). This will direct the holds targeter to look for a different copy of the item within PINES. It will also allow you to generate a report of missing items in your library.

If you receive an inappropriate holds request on your list (for an item type that is not eligible for intra-PINES loans), contact the requesting library via e-mail or telephone and ask them to remove the hold. Please DO NOT ignore such holds, as they will continue to appear on your list each day until they are resolved.

Libraries may choose to pull and process holds more than once per day if desired, and may also choose to pull and process holds on weekend days if desired.

Processing Holds

After pulling items from the shelves (or when receiving items routed to your location to fulfill a hold from another location), scan them into the Checkin Interface (Circulation > Capture Holds).

If the item being scanned is on hold for a local patron, the system will print a Hold Slip that contains the patron's contact information. If the patron has chosen to be notified by email, an email will be automatically generated within the hour and sent to the address on file. If the patron has chosen to be notified by telephone, then staff must call the patron. The item should then be placed on the Holds Shelf.

If the item being scanned is on hold for a patron of another location, the system will print a Transit Slip and staff will place the item in transit. Items should be appropriately packaged to protect them from damage while in transit [2008.11]. All materials should be treated the same as each library would want its own materials handled [2009.05].

The library should keep the hold or transit slip with the item (most libraries will insert the slip into a book with the slip showing), but should never use tape to attach the slip to a book [2019.09].

Additional information:

- Holds that are not processed within 24 hours will be re-targeted to another library if possible. For 5 days, the hold targeter will only select items within the pickup library. After 5 days, the hold may

be filled by any copy within PINES [2007.12]. Borrowed items should be promptly sent back to the owning library or on to the next library to fill a hold.

- A spreadsheet of PINES delivery addresses is provided to each library (see [Library Routing, Courier, and Contact Info](#)); you can print out the addresses needed on demand. For convenience, the Evergreen receipt templates for transit items are configured by default to print the library policy name and courier code for each item (see [Print Templates](#)). All items should be sent out within 24 hours of receipt of the holds list.
- Items should be placed in a green PINES courier bag with the courier code and library policy name in clearly showing through the window of the bag. Multiple items may be placed in a green bag, but all items within a bag must be destined for a single library branch (ie, an item going to ARL-ATH and an item going to ARL-BOG must be packaged in separate bags).
- Holds notices will be emailed within an hour of when the item is available for those patrons who have email addresses in their user records and who have chosen to be notified by email. Each library is responsible for contacting users who have chosen to be telephoned regarding available holds. No paper notices will be mailed centrally.
- Holds will also be captured in the normal course of checking in items. These holds should be processed and routed within 24 hours.

The Holds Shelf

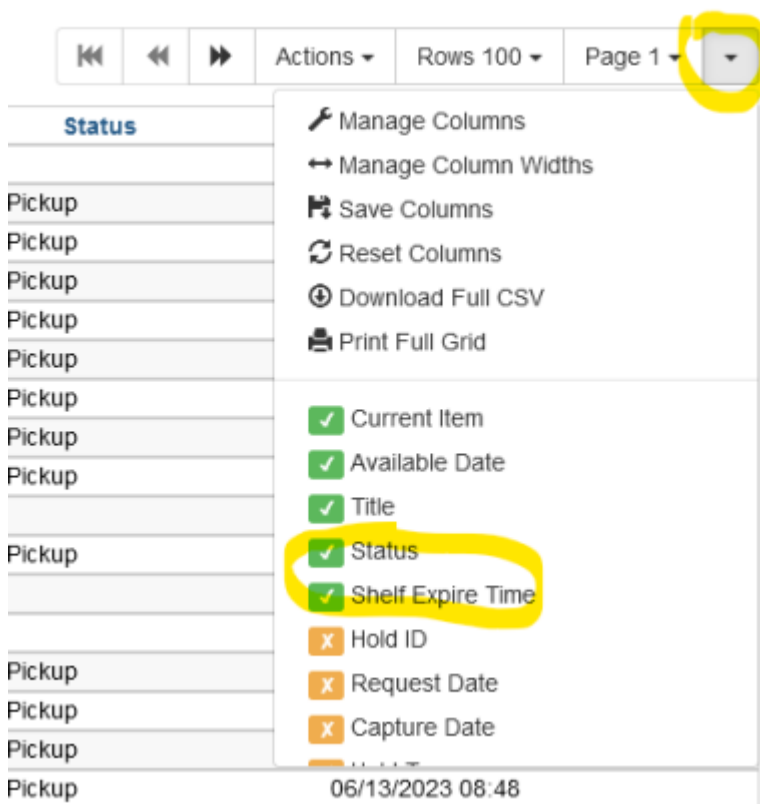
Each library may decide how long to keep its own items on the holds pickup shelf; however, items from outside the local library system should be held on the holds shelf for a maximum of seven (7) open business days [2009.05], then returned to the owning library or forwarded to the next person waiting in line for a hold.

Clearing the Holds Shelf

Staff should monitor the holds shelf and remove items that have not been picked up within the designated amount of time or whose holds have been cancelled.

Identify the holds which should be placed back into circulation.

- 1) Go to **Circulation > Holds Shelf**. The list you see should match the books that are actually present on your holds shelf.
- 2) Make sure the Status and Shelf Expire Time columns are showing and that 100 rows are showing. (If you are setting this up for the first time, be sure to also click Save Columns so that you won't need to do it again.



3) Click on the **Status** column header to sort the **Canceled** holds to the top of the page. Locate those items on the Holds Shelf (or in the stacks if they've been reshelfed) and check them in. If you are unable to locate an item, it should be marked Missing.

Title	Status	Shelf Expire Time
The shadow of his wings : 1861-1...	Canceled	07/13/2022 11:37
Helen Keller	Canceled	05/31/2023 09:33
The curious charms of Arthur Pe...	Canceled	06/09/2023 12:10
The storied life of A.J. Fikry : a no...	Canceled	06/09/2023 12:10
Executive power	Canceled	
The last Mrs. Parrish : a novel	Ready for Pickup	05/15/2023 09:16
The last Mrs. Parrish : a novel	Ready for Pickup	05/15/2023 09:19

4) Click on the **Shelf Expire Time** header to sort the oldest expired holds to the top (you may need to click it twice).

Ordinary grace	Krueger, William Kent.	Ready for Pickup	02/09/2023 09:55
Cleaning the gold : a...	Slaughter, Karin 1971-	Ready for Pickup	02/09/2023 10:46
Girl waits with gun	Stewart, Amy.	Ready for Pickup	03/01/2023 11:05
The awkward black m...	Mosley, Walter	Ready for Pickup	03/07/2023 10:08
Girl waits with gun	Stewart, Amy.	Ready for Pickup	03/08/2023 13:18
Don't cry for me : a n...	Black, Daniel	Ready for Pickup	03/09/2023 10:21

- If you click the Show Clearable Holds box, it will show you which items have been on the holds shelf for more than 7 days.
- The Available On column displays the date that the item was actually placed on the holds shelf.
- Each library system may determine how many days to allow their own items to remain on the holds shelf. However, items belonging to a different library system should not be held for more than 7

days.

5) Locate each of those items and scan the items in the **Check In** and enable the **Clear Holds Shelf** checkin modifier (see [Checkin Modifiers](#)).

The screenshot shows the 'Checkin Items' interface. At the top, there's a 'Checkin Items' header. Below it, a 'Clear Holds Shelf' button is circled in yellow. To the right of this button is an 'Effective Date' field set to '06/16/2023'. Below these elements is a table with columns: Family Name, Finish, Location, Route To, Start, Title, Circulation I, and Circulation L. Below the table, there are checkboxes for 'Print Receipt', 'Trim List (20 Rows)', and 'Strict Barcode'. To the right of these is a 'Checkin Modifiers' dropdown menu, which is open and shows a list of modifiers. The 'Clear Holds Shelf' option is selected and circled in yellow.

6) Check each of the items in.



Don't forget to UNCHECK the Clear Holds Shelf checkin modifier after you are done!

If you have checked the Show Clearable Holds box and you press the Clear These Holds button, the current holds for the listed items are all canceled at once, but their item status will still read 'On holds shelf' until you check the items in. If you use this method, you do not need to use the 'Clear Holds Shelf' Checkin Modifier, you can just check the books in as normal.

Checking in Returned Holds

When a patron returns an item that is owned by another library, the system will print out a transit slip directing the staff to return the item to the owning library (or to the next location waiting for a hold on the item). Route these items to the appropriate location within 24 hours of their return.

Suspending Holds

A hold can be placed on an item and then suspended (inactivated) until a later date by staff or the patron. The holds targeter will ignore these holds while they are inactive.

If an activation date is set, the system will automatically reactivate the hold on the set date. If not, the hold will not reactivate until manually reactivated by the patron or by library staff.

Changing the Pickup Location of a Hold

A staff member or a patron may change the pickup library of a hold after the hold has been placed. Once the pickup location has been changed, the item needs to be scanned on the checkin screen to place it in transit to the correct pickup library.

A patron may change the pickup location of a hold by going to My Account > Holds, then clicking the 'Edit' link next to the title.

Staff may change the pickup location of a hold from the Holds Shelf screen or from the Patron's Hold screen (Actions > Edit Pickup Library).

If the hold has its pickup library changed while it is in transit to the original pickup library, when it arrives and is scanned in, it will print a new transit slip to the new pickup library.

If the hold has its pickup library changed after it has already arrived at the original pickup library, the Status on the Holds Shelf screen will say 'Wrong Shelf.' If staff see the Wrong Shelf status, staff should re-scan the item on the check in screen in order to place it into transit to the new destination.

Holds Behind Circ Desk

A library may choose to have the holds shelf located in a staff-only area or in a public area where patrons can retrieve their own holds. Libraries that have public holds shelves can offer patrons the ability to request that their holds are placed in a private area. To make use of this feature, the library should set the "Behind Desk Pickup Supported" option to "true" in the Library Settings Editor. This will display a "Hold is behind Circ Desk" option on the patron information screen. Hold slips for these patrons will print with the notation "Private Holds Shelf" and all other hold slips will print with the notation "Public Holds Shelf" [2014.05].

Hold Restrictions

Select categories of items (defined by [circulation modifiers](#)) and [age-protected items](#) are only available for holds by patrons registered to the owning library/region, and are only available for pickup within the item's owning system. [2007.02]

Restrictions by Circulation Modifier

PINES policy enforces hold restrictions on categories of items with select circulation modifiers including,

but not limited to, statepass, microform, and e-device. Some types of items are holdable only at the owning library or within the owning regional library system, and some types of items are not holdable. Leased items will be treated the same as any other book with regards to holds [2006.11].

Note: Prior to March 1, 2022, holds on audiovisual materials were restricted to pickup at their owning library systems. [2021.12]

For a complete description of the circulation and hold policies related to each circulation modifier, see: [PINES Circulation Modifier List and Definitions](#)

Age Protection

Age Protection allows libraries to prevent holds on new books (on a copy by copy basis) from outside the owning library's branch or system for a designated amount of time. The purpose of this is to give the library's local patrons a chance to check out the new book before sending it off to other libraries. Libraries typically use this feature for popular fiction, but may also choose to use it for any or all other new books.

Each item (copy) has an "age_protect" flag which may be set to 3 month, 6 month, or None (based on the item's activation date):

- If set to "3 month" and the item was made active less than 3 months ago, the item is only holdable by patrons whose home library matches the circulating library of the copy. (Note: The system interprets 3 months as 90 days.) After 3 months, the item will automatically roll over to 6 month age protection.
- If "6 month" is set and the item was made active less than 6 months ago, the item is only holdable by patrons whose home library is within the same system as the circulating library of the item. (Note: The system interprets 6 months as 180 days.) After 6 months is over, the item will no longer be age protected and holds may be placed on it from any PINES location, but the age_protect flag will still appear as "6 month."
- If age protect is set to None, then no age protection occurs and the holds can be placed on the item from any PINES location.



Age protection restrictions only apply when placing holds; they **do not** apply when patrons are checking out items in person.

Book Club Holds

Library staff may place up to 20 holds on a single title at once for the purpose of obtaining copies for book clubs. To use, place a title-level hold as normal but select a number from the Number of Copies dropdown list. [2019.01]

Holds on Multi-Part Items

See: [Instructions for Circulation and Reference Staff \(Video\)](#)

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Last update: **2024/02/18 16:50**

