

REQUEST MANAGER HOLD LISTS (rev. 11/20/2013)

By Status		Explanation		Staff Actions	
Item	Held	Your library's items being held for your patrons at your library or other libraries' patrons at their libraries.	Check it out to patron. Check it in if not picked up by Unclaimed date. Can indirectly Cancel.		
	Pending	This is the default setting - the Request Manager list that you run to fill holds. These are your library's items that have been linked with specific hold requests.	Search shelves for item and check it in. Can use Fill Now function if have a different edition. Can Cancel Hold .		
	Shipped	Your library's items that have either been shipped to your library to fill holds for your patrons or that you have shipped to other libraries to fill their patrons' holds.	On a weekly basis, open link to item record to see if item should have been checked in at destination library. Notify FLLS or destination library if there is a problem		
	Unclaimed	Your items that are either on your hold shelf beyond the Unclaim date or are Unclaimed on another library's hold shelf.	Search hold shelf for items that are to be picked up at your library and check items in. Contact FLLS or pickup location to check on item.		
	Active	Your patrons who have Active holds. The holds have not yet been linked to an available item.	Monitor it. Cancel or Convert to an ILL if the hold request can not be filled. Should Expiration date be changed because of # of Holds?		
	Cancelled	Your patrons who have holds that have been cancelled by themselves or a staff person.	These holds may be Reactivated .		
	Expired	Your patrons who have holds that have expired.	These holds may be Reactivated or Converted to an ILL .		
	Held	All the items that should be on your Hold shelf. The list can be sorted by patron name.	Monitor it to be sure that no holds remain on shelf beyond Unclaimed date.		
	Inactive	Your patrons' holds that are not active; that is, the activation date is after today's date.	Items will automatically move to Active status upon activation date. These holds may be cancelled or converted to an ILL		
	Patron	Not Supplied	Your patrons' holds that could not be supplied.	In almost all cases these were item-specific holds that were placed by library staff for items that were not available for hold. Many times, this could have been avoided if a bib-level hold was placed. 1) Open hold request to see why hold was not supplied. 2) Check the bib record connected to the item record to see if there are other item records that are not restricted. 3) If yes, place Bib-level hold. 4) If not, monitor the restriction on the item records and reactivate when restrictions are lifted. These requests may also be converted to an ILL.	
Pending		Your patrons' hold requests that have been linked with an available item.	Can monitor periodically for anomalies.		
Shipped		Items that have been shipped to fill your patrons hold requests.	On a weekly basis, open link to item record to see if item should have arrived at your library. Notify FLLS or sending library if there is a problem.		
Unclaimed		Your patrons' holds that have not been picked up.	Search hold shelf for items and check them in.		
Active Cancelled Expired Held Inactive Not Supplied Pending Shipped Unclaimed		<p>In most cases the Request Manager lists by Patron and Pickup are identical. This will not be true where patrons designate a pickup location that is different from their home library. The lists by Patron will have a column labelled Pickup and will include their patrons' holds that will be picked up at another library. The lists by Pickup will have a column labelled Patron Branch and will include holds of other libraries' patrons that are being picked up in your library.</p> <p style="text-align: center;">See staff actions for lists by Patron</p>			