

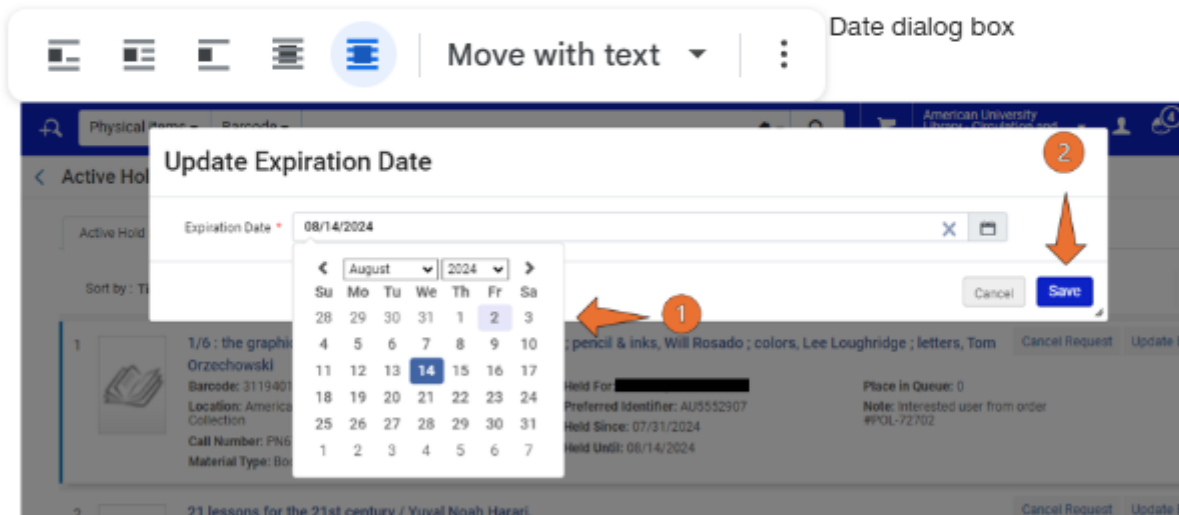
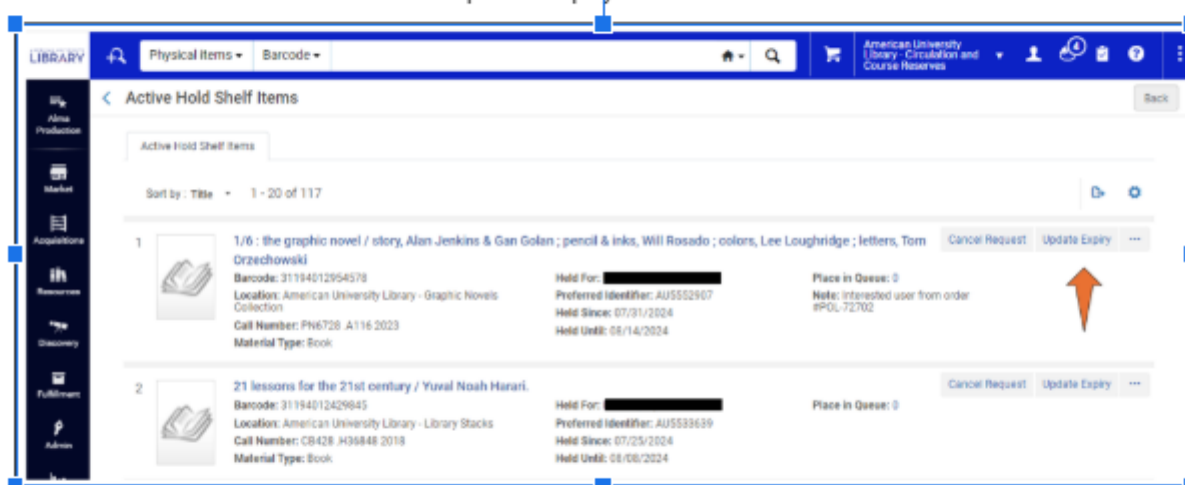
# Discharging CLS Hold Shelf Items

## Discharging CLS Hold Shelf Items

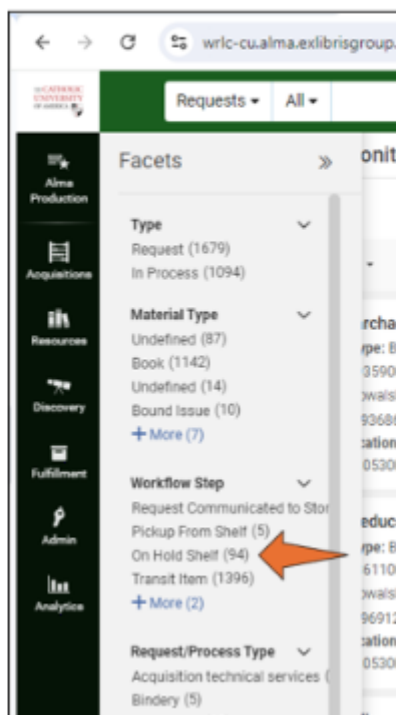
- Hold Shelf Items that Have NOT Expired Past Due Date
- Hold Shelf Items Expired Past Hold Until Date

### Hold Shelf Items that Have NOT Expired Past Due Date

1. Manually update the expiration date to the day *before* the current day's date
  - a. Use the previous day's date to ensure Alma recognizes the item as expired.
    - i. Fulfillment> Resource Requests> Active Hold Shelf> Locate item you want to update
    - ii. Click the Update Expiry button



2. In the event that you need to update an item's expiration date from the lending side
  - a. Fulfillment > Resource Requests > Monitor Requests & Item Processes
  - b. Use the left-hand side Facets to the left and select "On Hold Shelf" under Process Type:



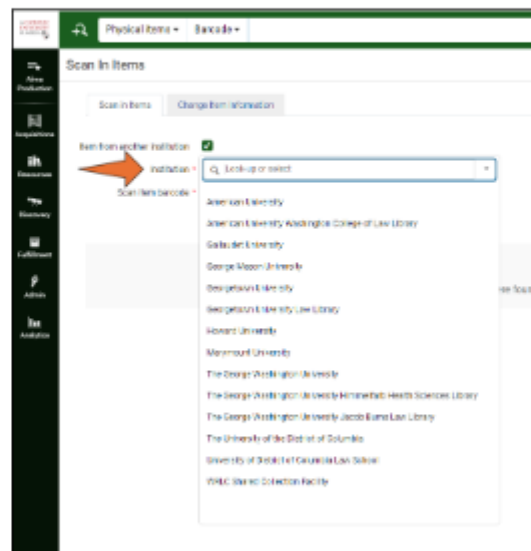
- c. Locate the item you wish to update
  - d. Using the previously provided instructions, manually update the expiration date to the day before the current day's date
3. Scan In Items; status in Alma should be In transit for Reshelving with the owning library as the destination
  - a. Fulfillment > Scan in Items
  - b. The item's status should now reflect as In Transit for Reshelving with the owning library as the destination
  - c. Insert the CLS green courier routing slip to identify for the courier

NOTE: Checking the item out to the patron, and Checking it back in will also close out the request

### Hold Shelf Items that Have Expired Past Hold Until Date

- **NOTE: To be used for Expired Hold Shelf Items ONLY**

1. Scanning the item in is essential
  - a. If the item was never checked out to the requestor, it **MUST** be scanned in after selecting the appropriate owning institution in the Scan In facet
  - b. Return Items may only be used if the item is on loan to the requestor
2. Fulfillment> Resource Requests> Scan In Items
  - a. Select radio dial for Item from another institution
  - b. Use the Institution field drop-down menu to select the owning library
  - c. Enter barcode into the Scan In barcode field, as per usual

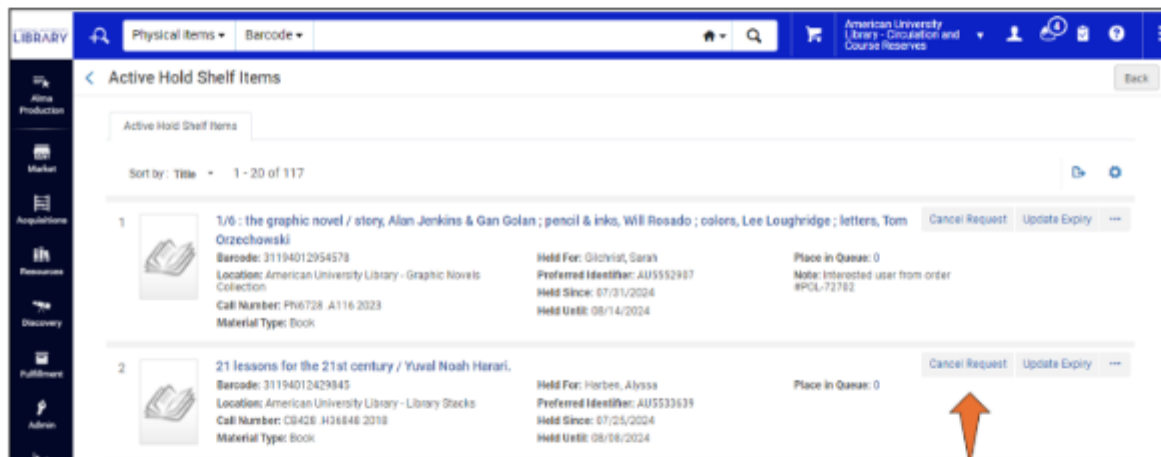


3. Items with Active Request; if after using Scan In or Return, the borrowed item still has an Active Request, follow one of the following options:

- a. Manually update the Expiry date (see above for detailed instructions) to the day before and Scan In again
- b. The Hold should be cleared; the Item's status should reflect as In Transit for Reshelving with the owning library as the destination

OR

- c. Cancel the Active Request
  - i. Fulfillment> Resource Requests> Active Hold Shelf> Locate Item Record
  - ii. Find the item in the list that the patron no longer wants
  - iii. Select the Cancel Request button located to the left of the Update Expiry button



- iv. Use the drop-down menu in the Cancellation Reason field to select a reason for cancellation
- v. If the patron doesn't know you are canceling the request, you can uncheck the Notify User box
- vi. Select Confirm
- vii. The Item's status should reflect as In Transit for Reshelving with the owning library as the destination

4. Place Directly on Hold Shelf

NOTE: Some institutions have an additional option on their Scan In Items page to toggle Place Directly on Hold Shelf, while some do not.

a. No option to Place Directly on Hold Shelf

**Scan In Items**

Scan In Items

Change Item Information

Automatically print slip

☐ Yes ☒ No

External Identifier

☐ Yes ☒ No

Register in-house use

☒

Item from another institution

☐

Work Order Type

▼

Scan item barcode \*

OK

Scan request ID

OK

b. Option to Place Directly on Hold Shelf

**Scan In Items**

Scan In Items

Change Item Information

Place directly on hold shelf

☐ Yes ☒ No

Automatically print slip

☐ Yes ☒ No

External Identifier

☐ Yes ☒ No

Register in-house use

☐

Item from another institution

☐

Work Order Type

▼

Scan item barcode \*

OK

Scan request ID

OK

- i. This configuration adds a Hold Processing status to the Hold Shelf process. Hold Processing does not send an automated letter to a user when the item is scanned, and does not consider the item ready to be picked up.
  - ii. If you do have this option active, we recommend you select “No” when scanning in items expiring off the hold shelf or being returned by users.
5. Configure Place Directly on Hold Shelf functionality
  - a. Select Configuration> Use the Configuring drop-down menu in the top menu ribbon to select the desired Library
  - b. Fulfillment> Library Management> Circulation Desk List> Select desired Circulation Desk
  - c. General Details> Hold Shelf Information> Select Has Hold Shelf radio dial
  - d. The Place Directly on Hold Shelf option will now appear on the Scan In Items page, for both the Scan In Items tab and the Change Item Information tab.

Configuring: HU Central Libraries

### Circulation Desk - General Information

Cancel Save

General Details Physical Locations Work Order Types Operators Automatic Filing

General Details

Name: Default Circulation Desk

Primary: ☒

Reading room desk: ☐

Pick from shelf: ☐

Supports personal delivery: ☐

Supports registering new users: ☒

Supports overruling return date: ☒

Time to reshelve (hours):

Delay for hold notification (minutes):

Additional Information

Description:

Map:

Printing Information

Default Printer:

Additional Printers:

Creates return receipts: ☐

Creates loan receipts: ☐

Hold Shelf Information

Has hold shelf: ☐

Hold shelf action of:

- e. [ExLibris Knowledge Center: Configuring Circulation Desks](#)
  - i. General System Administrator
  - ii. Fulfillment Administrator

### **Best Practices/Guidelines**

- After returning the item, and with items never picked up by the requestor, best practices recommend using the Scan In functionality before sending it to the owning library to prevent further issues for the lending institution.
- Only Use the SCF provided CLS green routing slips for returning items to their home institution. The green routing slips will signify that an item is no longer needed.
- If an item comes back to the home institution with a green routing slip, but it still has an active request attached to it, it should be assumed that the item is no longer needed regardless of the request date. The active request can be canceled at the home institution and the item can be scanned in after the cancellation. The destination should now be for the item to be reshelved.
- If you scan in an item or return an item and get notified that the destination is "lending/owning institution, borrowing institution" it is likely that a request is still attached to that item. Cancel the request attached to the requesting patron and Scan In again.
- Only one institution should be listed as the destination. The only possible exception might be SCF items

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Revision #1

Created 1 April 2025 15:19:25 by Angelique Carson

Updated 1 April 2025 15:36:27 by Angelique Carson