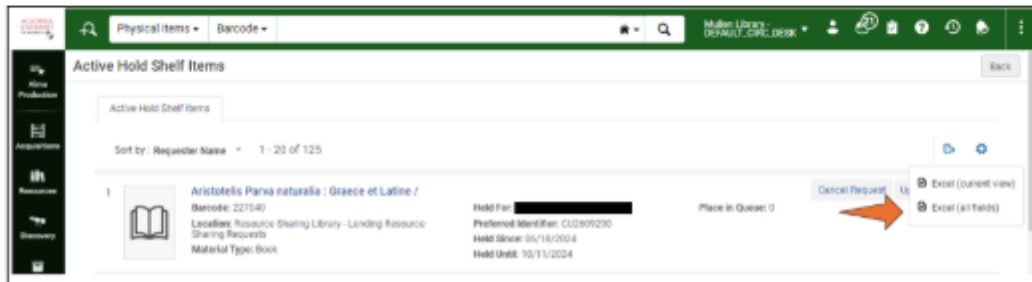


Expired Hold Shelf Audit Workflow

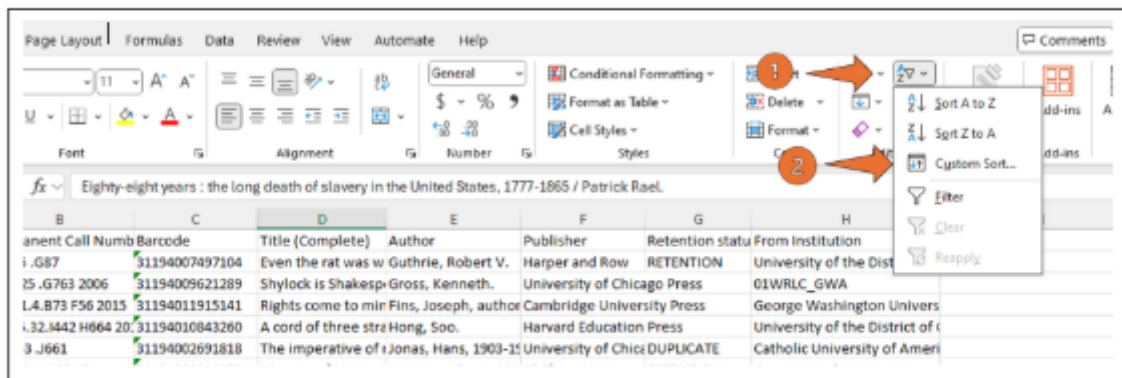
Expired Hold Shelf Audit Workflow

NOTE: At the RSAC September 2022 meeting, representatives agreed to include outstanding Expired Hold Shelf items that were not located at the lending or borrowing institution.

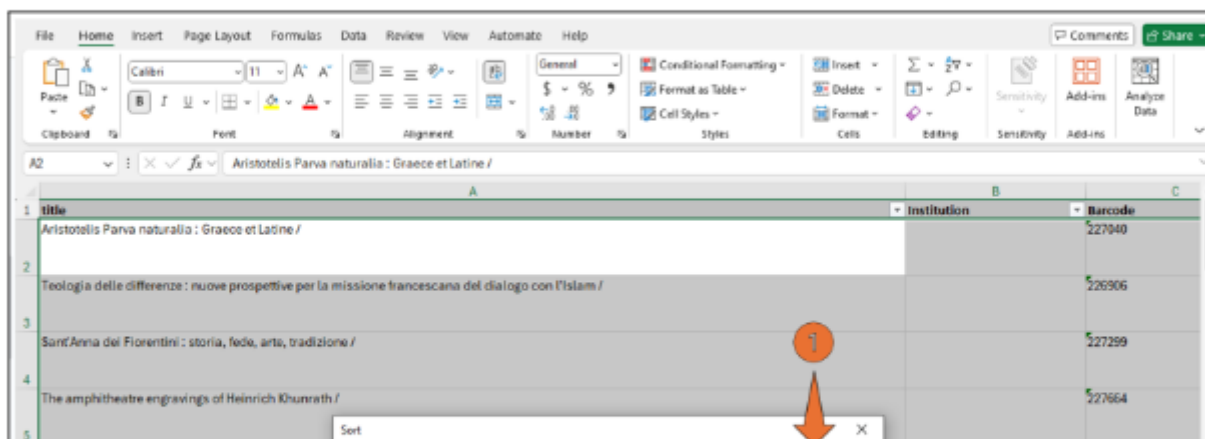
1. Export Active Hold Shelf: Fulfillment> Resource Requests> Active Hold Shelf> Export Icon <Excel All Fields



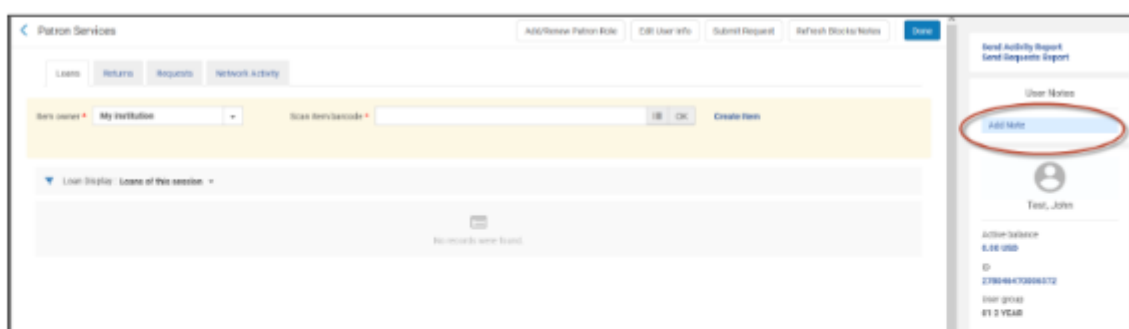
- a. Sort document per the Held Since column
 - i. Locate AZ Sort & Filter> Custom Sort in the top right- hand side of the Excel spreadsheet's menu ribbon



- ii. Engage radio dial <My data has headers>
- iii. Column> Sort By> Held Since
- iv. Sort On> Cell Values
- v. Order> Oldest to Newest
- vi. Select <OK>



- b. Once search is completed, contact the lending library to request a corresponding search
 - c. Note: searches will likely yield some anomalies related to pre-architecture
 - i. Post re-architecture, SCF items have an "X" at the end of the barcode
3. If item is located at either the requesting or lending library
 - a. Process per standardized workflow: [Discharging CLS Hold Shelf Items](#)
4. If item is *not* located at the requesting or lending library, it is likely in the possession of the requesting patron and was not properly Discharged/Checked Out
 - a. Similar to ILLiad lending agreements, the lending library is ultimately responsible for compensating fellow libraries for Lost or Missing requested CLS materials
 - b. A library may choose to contact the requesting patron and check the item out to the patron's account; below is a suggested workflow:
 - i. Send initial email to the patron
 - "Hello, The item you requested on XX/XX/XXXX titled "Lorem ipsum dolor sit amet", was not correctly checked out to your My Library account at the time of pick-up. This item will be checked out to your My Library account. If you have any concerns, please contact the XX Circulation Desk at XXXXXX@edu"
 - ii. A library may choose to either wait a set number of days for a response or proceed with checking the item out to the requesting patron's account
 - Check out requested item to patron's account
 - Enter a Pop-Up note on patron's account
 - Locate Add Note on the right of the Patron Services screen (the Check Out screen)



- Active Hold Shelf and corresponding Expired Hold Shelf should update accordingly
 - When the item is returned, it will be discharged, as per usual, as a CLS items
- iii. If the patron claims they did not receive the book, the patron's home library will discharge the item from the patron's account (if already added) and assume responsibility for the item
- Process per standardized workflow: [Discharging CLS Hold Shelf Items](#)

Revision #1

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