

The Problem

The Access Manual states to call the customer to see if they have the hold that is missing from the hold shelf, but many people are not reachable by phone. The manual does not provide information on what to do when this happens.

The Proposal

EXPIRED HOLDS NOT ON THE SHELF

1. The Hold Expired List will display the customer information that had the item on hold.
2. Try calling the customer to find out if they have the material.
 - a. It is acceptable to use the title of the item when calling a customer directly. By using the phone number provided by the customer, we are assured of their identity.
3. If they have the material:
 - a. Educate the customer that holds need to be checked out before they take them home.
 - b. Check the material out to the customer so we know where it is.
4. If they do not have the material and still want it:
 - a. Follow directions for Items Missing from Holdshelf (covered in Workshop 2).
5. If they do not have the material and do not want it:
 - a. Follow directions for Items Missing from Holdshelf but choose to Cancel the hold and DO NOT place first in que.
6. If you are unable to reach them:
 - a. Leave a message and follow up with an email if there is one on the account using the general library email.
 - b. Place a note on the account that says: Missing Hold Item Number called by Library on Date (Missing Expired Hold 78647156 called by NW on 7/5/18).
 - c. The following script should be used for email and adapted for phone messages:
 - i. *Hello Ms./Mr. X,*
You currently have the item "Title of Item" (item number) on hold to pick up at the Name of Library. We cannot locate this item on our reserves shelf. If you accidentally have the item at home without having checked it out, please let us know as soon as possible. You can contact us at "Library Phone Number" or by replying to this email. No fines or fees will be placed onto your account. We're simply trying to locate the item. Thank you for your cooperation!
 - d. Place See Notes status on the account so that the customer cannot use the self-checkout.
7. After an item has been on the expired holds list for a week, trace the item. Leave the note in place.
8. If a customer consistently has items missing from the hold shelf or has two or more items missing at one time, staff may choose to hold future holds behind the desk so that the customer can be educated in person.
 - a. The note about the missing expired holds should indicate future holds will be held at the desk. (Missing Expired Hold 78647156 called by NW on 7/5/18, future holds behind desk).
9. Once a customer has been educated, delete all notes regarding missing expired holds.

- a. If staff believe the customer is intentionally violating a rule of conduct (monopolizing library resources, theft, failing to comply with a reasonable request, etc.), leave note on the account.
- b. Staff should report customers with large amounts of missing expired holds or customers who consistently fail to check out their holds to a supervisor for ROCV entry.

Recommendations presented by Janeal Walker (NW) and Zach Branstetter (DC)