

Hold Label vs Receipt Tracking Instructions

Purpose: To do a baseline test and a live test on tracking hold labels vs hold receipts.

Using the spreadsheet provided, track the following for the designated one-week baseline period and two-week live period as determined by PSLT.

Spreadsheet: The spreadsheet is divided into separate tabs.

1. **Printable** sheet for libraries to use so all staff can write data down.
2. **Baseline** data for managers to enter all data so it can be compiled and analyzed
 - a. Processing Morning / Daily Holds Log
 - b. Processing Holds Expired Log
 - c. Processing Delivery Log
3. **Live** data for managers to enter all data so it can be compiled and analyzed
 - a. Processing Morning / Daily Holds Log
 - b. Processing Holds Expired Log
 - c. Processing Delivery Log

The baseline data and live data is the same information so we can compare. Pay attention when adding data to ensure you're adding it to the correct tab.

Processing Morning / Daily Holds Log:

For Processing Morning Holds / Delivery: Time is measured from logging into CARL to shelving/routing the last hold. Do not track time spent inputting data into the logs.

- Date
- Reporting Library (included on the data entry tab, not the printable log)
- Time Started
- Number of Staff Processing Morning Holds
- Time Ended
 - If you pull holds multiple times per day, use additional lines using the same date.

Processing Holds Expired Log:

For Processing Holds Expired: Time is measured from logging into CARL to finishing processing the list (including removing hold labels/receipts, activating next in CARL, and sending to it's next destination). Do not track time spent inputting data into the logs.

- Date
- Reporting Library: Your location (included on the data entry tab, not the printable log)
- Total Number of Items Pulled
- Time Ended
 - If you have multiple deliveries or multiple attempts to complete the delivery, use additional lines using the same date.

Processing Delivery Log:

- Date
- Reporting Library: Your location (included on the data entry tab, not the printable log)
- Total Number of Receipts needed to be reprinted due to damage or missing
- Number of Holds Difficult to Shelve
- Number of Positive Comments and Negative Comments on the Receipts from Guests