Marmot Library Network
Patron Initiated Holds
Access Services Committee
Best Practices

This document has been written to provide participating Marmot resource sharing libraries some quick guidelines for patron initiated holds. Suggestions can be directly e-mailed to the Access Services Committee (asc@marmot.org.) Urgent issues can be sent directly to the appropriate Marmot library staff member. Member library staff contacts for holds and other documents related to this are posted at: http://info.marmot.org/tiki-index.php?page=Patron+Placed+Holds+Help

Change Log:

Sep 17, 2007	1st edition	
Mar 4, 2008	2d edition	
Jul-Sep 2010	Edits related to Prospector?	
Sep 21, 2012	Procedures 7-11 proposed at MUG	
Nov 7, 2012	3d edition DRAFT with new change log and minor edits posted to ASTF.	

http://info.marmot.org/tiki-index.php?page=Patron+Placed+Holds+Help

PLACING HOLDS: It is recommended that all holds be placed via VuFind as this will create the appropriate bib-level hold, and if necessary, prompt the user to select a volume and create an item level hold for the correct item. Patrons placing their own holds are already automatically doing this. Staff needs to pay attention to this. Even if only one library in the Marmot system has the requested item, always place it as a bib level hold.

DAILY:
1. Check in all materials from incoming courier totes first.
2. Run **Item Paging Slips** and **Title Paging Slips** at the same time. It is up to the participating library how many times a day these notices are run.
   - Pull the requested items from the shelf and scan the item barcodes using the **Check In** module of Millennium. At this point, the screen will give the choices of:
     1. "Fulfill hold" **OR** "Check in do not fulfill hold" (this option can be used for items that are in disrepair, non-circulating or have other issues.
     2. ALWAYS scan the item, even if the item is non-circulating. This way, the next library owning the item will get an item or title page slip.
   - Read the screen to make sure the item is properly routed.

(**Never** Cancel Holds from this screen unless the print hold cancellation notice option is chosen. Otherwise cancelling a hold will cause the marmot patron to lose their hold on the item without warning. (This process can also be managed by using the Search Holds module or / View Holds report or by moving the patron on the queue option.) Bundle no more than three (3) items traveling to the same library using appropriate CLiC courier slip, courier code, date, and checked "circulation" box. Place in transit items in the specified courier tote.
   - Items to be picked up at your own library can be placed on the hold shelf for patron pick up via standard notification options (e-mail, phone, letter, etc). Items should remain on the hold shelf for eight (8) days.

- Returning items can be bundled together with the patron initiated hold items traveling to the same location. The item barcode will be scanned and checked in when the item(s) reaches the owning library.

Recall Notices should never be used. Exception: Libraries may recall their own items when particular needs arise.

Library staff should ONLY contact LOCAL patrons concerning items they have borrowed. Library staff from lending/borrowing libraries should never contact patrons from other member libraries directly. System generated e-mails to non-local patrons are fine, *as are snail mail generated overdue and billing notices.*

Missing items & Item status. If an item cannot be located, please change the item status in the computer or if time allows, replace the hold for the patron. The other option is to cancel the hold and print a Hold Cancellation notice which is automatically sent to the patron or requesting library.

3. Run **Hold Cancellation Notices** every day. Hold cancellation notices/letters will be generated and can be sent to patrons. Libraries may choose to address each notice before alerting the patron.
4. Run **View Holds Report** at least two times a week. This report is used to troubleshoot holds that have not changed status. It is recommended that the "date placed" on the report should be no longer than 7 days unless the item is currently checked out or there are multiple holds on the item, therefore the wait will be longer. In transit items should not remain in transit status for more than 7 days.
5. **Overdue Notices/Bills** are sent to all patrons via e-mail or USPS, Marmot-wide. It is suggested that all libraries utilize the automatic e-mail notification option in Millennium. Fines are now assessed by the patron's home library based on the patron's home library's loan rules. Billing for lost items is based on the patron's home library's rules (not the owning Library). Notices are generated by the patron's home library. Bills should be sent to the patron with a copy sent to the patron's home library.
6. **Run a Create List** to pull the items with a status of "In Transit". If the item has been in transit for more than 7 days, either the item was not checked-in when it arrived or it never arrived from the loaning library.
7. **Billed Items Fee Collection:** The home library of the PPH borrowing patron will collect any and all billing fees for lost items. Not the items home library. We will not charge each other for items lost in the PPH process.
8. **Billed items to Lost items:** The owning library may contact the lending library to mark items lost on their patron's record, which will allow the owning library to delete or modify the record as they see fit.

   No money is exchanged between libraries for lost items. Lending libraries should contact owning libraries to see if they will accept a replacement copy and if only an exact copy is acceptable or if a newer/different edition is acceptable. A list of libraries that will accept a replacement copy is available on the Marmot Patron Placed Holds Help web page: http://info.marmot.org/tiki-index.php?page=Patron+Placed+Holds+Help (need to add this list)
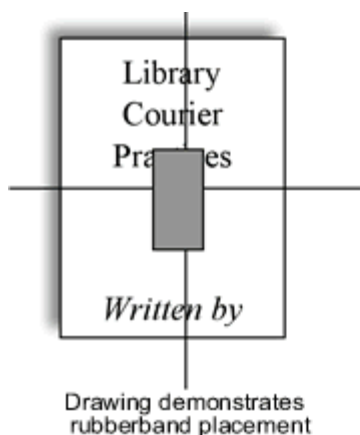   If a replacement is not accepted by the owning library, a replacement copy can be added instead to the borrowing library's collection which will make the item available again in Marmot. Each library will determine the price they will bill to their own patrons for lost PPH items.

   Stolen and damaged books are handled like any other lost book. The owning library should work with CLIC if an item is damaged by the courier.

9. **Borrowing Times for PIH by staff/faculty:** Staff members with extended check out times should show consideration for loaning libraries loan rules. Check out times should reflect the time an average patron would be able to check out the item.

Bundling and crating for the statewide courier *from www.CLiCweb.org*

- Each bundle shall be secured with a sturdy vertical rubber band **and** a horizontal rubber band. We recommend size 117, 1/8-inch thick. (see example below)
- Routing slip shall be folded in half and stapled around the horizontal rubber band. (see example below)

Library
Courier
Pra___es

Written by

Drawing demonstrates
rubberband placement

- Do not bundle more than three items together.
- Large or heavy items shall always be bundled separately. Keep the bundles small enough to be handled easily.
- Fragile items (i.e., CD's and cases, small or soft-cover books) should be carefully packed with appropriate cushioning to prevent damage. Mark "Fragile."

Labeling the bundle.

Use the correct courier routing code.

- o An up-to-date list is always available on the CLiC website at: http://courier.clicweb.org/pubrpts/index.php?do=Code+Reports.
- **PRINT** the code **exactly** as it appears on the list on the first line in the "TO" box.
- Check **"MARMOT"** on the courier slip.