



**Sitka**

## On the List: Holds Management in Evergreen

### Basic Hold Workflow

1. [A hold is placed](#) by the patron or by library staff on behalf of the patron
2. Library staff [capture the hold](#). This can happen when an item on hold is returned and checked in or when staff pull and check in available items listed on the [pull list](#).
3. The patron is [notified automatically by text or email](#), or manually by staff
4. The item is placed on the [hold shelf](#).
5. The hold is complete when the patron checks out or [cancels their hold](#) or when staff cancel or [clear the hold](#).
6. Staff regularly check their [hopeless holds list](#) to resolve unfillable holds.

### Tips

- Know how your holds are set up -  
[http://docs.libraries.coop/sitka/holds.html# is it holdable](http://docs.libraries.coop/sitka/holds.html#is_it_holdable)
  - Do you have non-holdable shelving locations?
  - Do your hold policies block holds for particular types of items or patrons.
- Retarget holds for newly catalogued items through the [checkin modifiers](#) or the [staff catalogue](#)
- Do regular clean up of your [holds pull list](#), [holds shelf](#), and [hopeless holds](#)
- Know how to [view and update the notification method and details](#) for a particular hold
- Know what [notifications](#) are sent to your patrons and how to [check if they've been generated](#)
- NEVER cancel a hold that is to be picked up at another library
- Use [hold groups](#) to [place holds for multiple patrons](#) at once
  - You can set up a form or webpage with a list of hold groups patrons can subscribe to through the library

### Documentation

- [Holds](#)
- [Hopeless Holds](#)
- [Hold Notifications](#)
- [Hold Policies](#)
- [Age Based Hold Protect Rules](#)