Identifying Old and Expired Holds

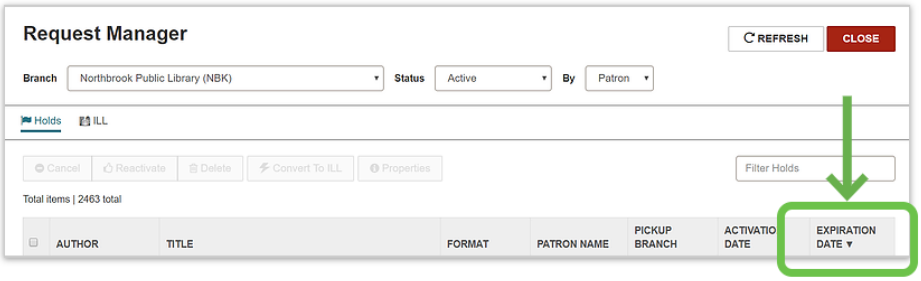
When a patron places a hold, the hold will remain active for one year. If the hold is not filled within that time period, the hold becomes Expired. Expired holds display in a patron's record for two weeks before being deleted. During these two weeks, staff may Reactivate an Expired hold or Convert it to an ILL request.

Identifying Old Holds

Staff have several ways to identify old or stale requests.

1. THE REQUEST MANAGER

The Request Manager can be found in Leap under Utilities -> Request Manager. Staff can view Active holds either by Pickup (holds where your library is the pickup location) or Patron (holds placed by your patrons). Click on the "Expiration Date" column heading to view holds that will be expiring first.



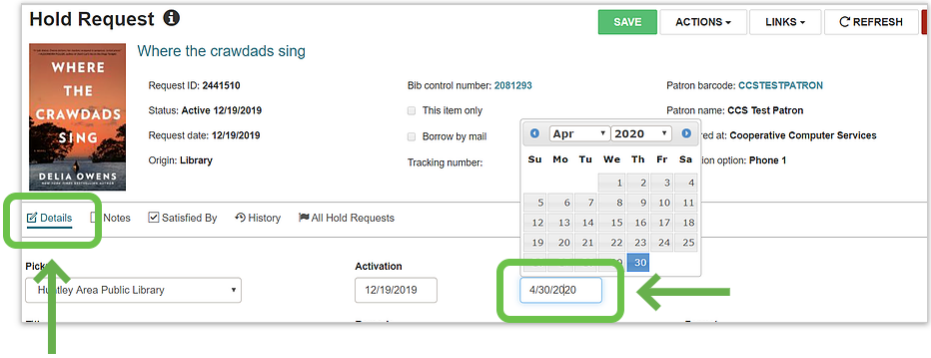
2. WEB REPORTS - "Old Holds"

Web Reports contains a report called "Old Holds." This report can be located under Patron Management -> Old Holds. This report lists holds placed by your patrons that are 30 or more days old and have a status of Active or Unfillable.

EXTENDING THE EXPIRATION DATE

Staff can extend the Expiration Date of a hold if, for example, a title's publication date has been pushed back. To change a hold's Expiration Date:

1. Locate and open the hold request record.
2. In the Details view, click on the Expiration Date field.
3. Key in or select a new date from the calendar.
4. Save the changes.



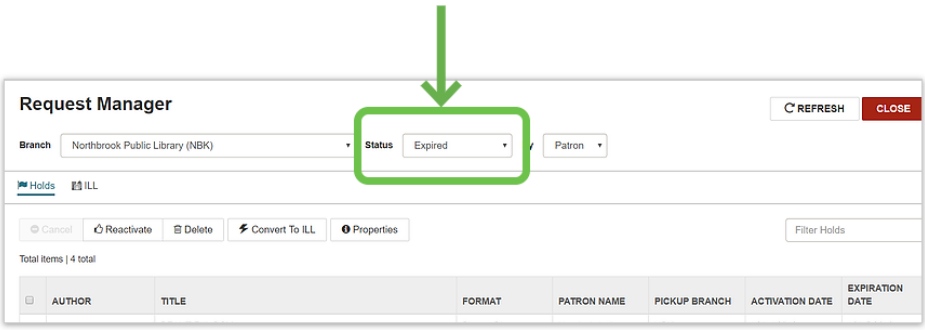
Identifying Expired Holds

Expired holds display in a patron's record for two weeks before being deleted. During these two weeks, staff may Reactivate an Expired hold or Convert it to an ILL request. There are a couple methods staff can use to identify Expired holds.

1. THE REQUEST MANAGER

The Request Manager can be found in Leap under Utilities -> Request Manager. Change the status to "Expired" to view Expired requests. Staff can view these holds either by Pickup (holds where your library is the pickup location) or Patron (holds placed by your patrons).

Click the checkbox next to a hold to have the option to reactivate or convert to an ILL. Staff can also click on the hold to open the full request record. In the request record, these options can be found under the Actions drop-down menu.



2. STAFF CLIENT REPORT - "Expired Requests"

Staff who are part of the Reports & Notices permission group are also able to access a Polaris report from the staff client. The report can be found in the staff client under Utilities -> Reports & Notices -> Circulation -> Holds -> Expired Requests. Select your branch. The report will list holds for pickup at your library that are Expired.