

How to Redirect an In-transit Hold Request to a Different Pickup Library

Since pickup location cannot be changed in Polaris while an item is in transit, the following instructions explain **how staff can redirect an in-transit hold to another pickup library** of the patron's choice. This may be necessary when a library is closed or when a patron asks you to change a pickup location.

The essential point is that you do not want to trigger a hold pickup notice to the patron with the message that the item is available for pickup at the original library. However, you must check-in the item, since the pickup location cannot be changed while the item is in transit/en route/transferred (different terminology is used in different places).

An in-transit Hold Request can be redirected when the physical item is not present, also, an in-transit Hold Request can be redirected when the physical item is present. To redirect:

1. Go to the patron's **Patron Status** screen, and select **Requests**. See example below:

Barcode: 1105100375258 Name: ANN C BABITS

Acct charges: \$0.20 Patron code: Patron
Acct credit: \$0.00 Local Library Use: NO RECEIPT
Items out: 1 Phone 1: 908-123-4567
Total overdue: 0 Email address: ababits@bernards.org
Claims/Lost: 0/0 eReceipt: Yes
Items held: 1 Expiration date: 1/16/2016
Total holds/ILL: 11/0 Registered branch: Bernards Township Library

Holds

Polaris requests:

Author	Title	Format	Call Num...	Activation ...	Status	Pickup Bra...	Q...	Hold Until ...	G...
Hosseini, ...	And the mountains ...	Book		7/9/2013	Cancelled	Bernards T...			
Skloot, R...	The immortal life of ...	Book	362.1902...	7/9/2013	On waiting list	Bernards T...	3		
Skloot, R...	The immortal life of ...	Book	616.0277...	7/9/2013	On waiting list	Bernards T...	4		
Skloot, R...	The immortal life of ...	Book	616.0277...	7/9/2013	En route	Bernards T...	5		
Skloot, R...	The immortal life of ...	Book	616.0277...	7/9/2013	En route	Bernards T...	6		
Skloot, R...	The immortal life of ...	Book	616.0277...	7/9/2013	Ready for p...	Bernards T...		7/20/2013	

ILL requests:

Author	Title	Format	Activation Date	Status	Item	Pickup Bra...
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2. Select the item to be redirected and double click to open the **Hold Request** screen. See example below:

The screenshot shows a web application window titled "Hold Request - 1211075 - The immortal life of Henrietta Lacks - General". The interface includes a menu bar (File, Edit, View, Links, Tools, Help) and a toolbar with various icons. A vertical red sidebar on the left contains the text "Hold Request" and a magnifying glass icon. The main content area is divided into sections: "Request", "Patron", and "Details".

Request Section:

- Status: En route
- Request date: 7/10/2013
- Request date: 7/9/2013
- Activation: 7/ 9/2013
- Pickup: Bernards Township Library (BER)
- Origin: Library
- Expiration: 7/ 9/2014
- This item only

Patron Section:

- Barcode: 1105100375258
- Name: ANN C BABITS
- Registered at: Bernards Township Library (br)
- Patron code: Patron
- Notification option: Email Address

Details Section:

- Title: The immortal life of Henrietta Lacks
- Author: Skloot, Rebecca, 1972-
- ISBN/ISSN: 9781400052172
- Publisher: Crown Publishers,
- Date: 2010
- Edition: 1st ed.
- Series:
- LCCN: 2009031785
- Format: Book
- Item barcode: 0103001180258
- Call no.: 616.0277 SKL
- Pages:
- Volume:
- Issue:
- Serial copy:

For Help, press F1

3. Link to the **Item Record**. See example below:

This screenshot is identical to the one above, but with a red circle highlighting the "Item Record" link in the "Links" menu. The menu items are: Patron Status, Patron Registration, Bibliographic Record, Request, Item Record, Status, Holds Queue, and All Hold Requests.

4. **Check in** the item that is being transferred for pickup at the original library. See example below:

Item Record 2502823 - Cataloging - Polaris

File Edit View Links Tools Help

Barcode: 0103001180258 Record status: Find ILL Ebook Non-circulating Display in PAC

Title: The immortal life of Henrietta Lacks Bib control no.: 699702

Author: Skloot, Rebecca, 1972- Parent item: Item control no.: 2502823

Call number: 616.0277 SKL Price: \$26.00 Issue control:

Owner: Long Hill Library (br) Shelf location: (None)

Assigned: Long Hill Library (LHT) Temporary location:

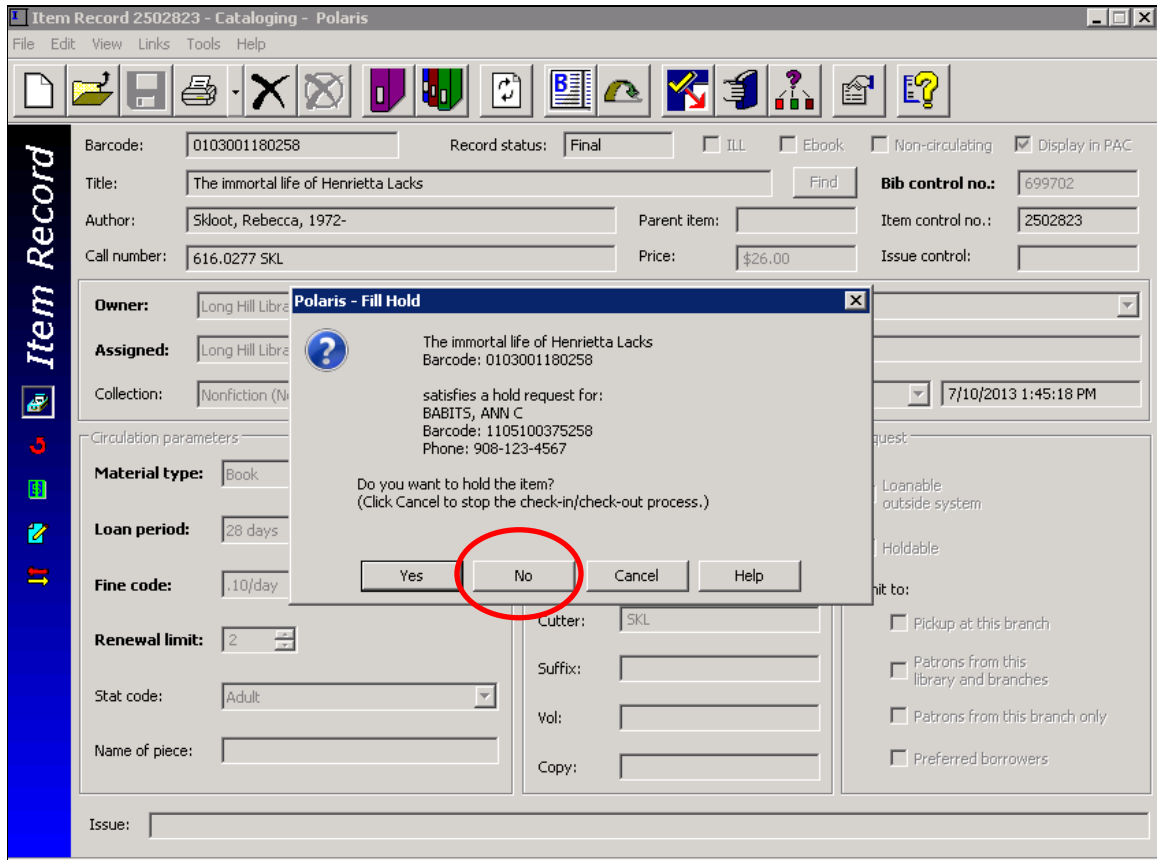
Collection: Nonfiction (Nonfiction) Circulation status: Transferred 7/10/2013 1:45:18 PM

Circulation parameters: Material type: Book Loan period: 28 days Fine code: .10/day Renewal limit: 2 Stat code: Adult Name of piece:

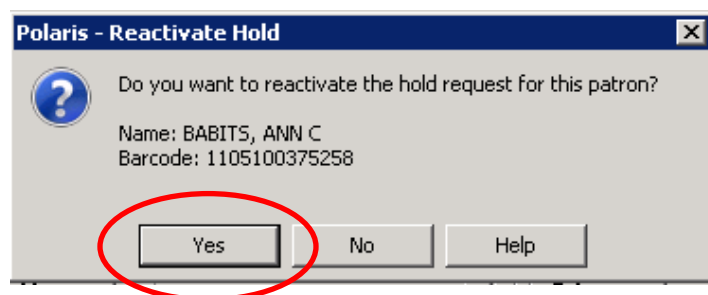
Cell number: Scheme: Dewey Decimal Prefix: Class: 616.0277 Cutter: SKL Suffix: Vol: Copy:

Request: Loanable outside system Holdable Limit to: Pickup at this branch Patrons from this library and branches Patrons from this branch only Preferred borrowers

5. If this step is done at the original library, a popup window labeled "Polaris - Fill Hold" asks **"Do you want to hold the item?"** Answer **NO** so that no hold pickup notice will be sent. See example below:
 - a. If the check-in is done at another library, a popup window labeled "Polaris - Transfer Hold" asks "Transfer for hold?" **Answer NO.**



6. **NOTE:** If a mistake is made by answering YES, immediately check the item in again and answer NO. If this is done quickly, it should prevent hold pickup notifications going out by Telephony or email.
7. In the next popup window, **answer YES to reactivate the hold request** for the patron. Remember, the patron maintains their position in the Holds queue. See example below:




8. If the item has no other holds, the item will be put in-transit back to the owning library. Discard the in-transit slip printed. If the owning library checks the item in, it will have a circulation status of “In” at this point. See the example below:

The screenshot shows the Polaris Item Record interface for item 2502823. The main window has a title bar "Item Record 2502823 - Cataloging - Polaris" and a menu bar with "File", "Edit", "View", "Links", "Tools", and "Help". A toolbar with various icons is located below the menu bar. The main content area is divided into several sections:

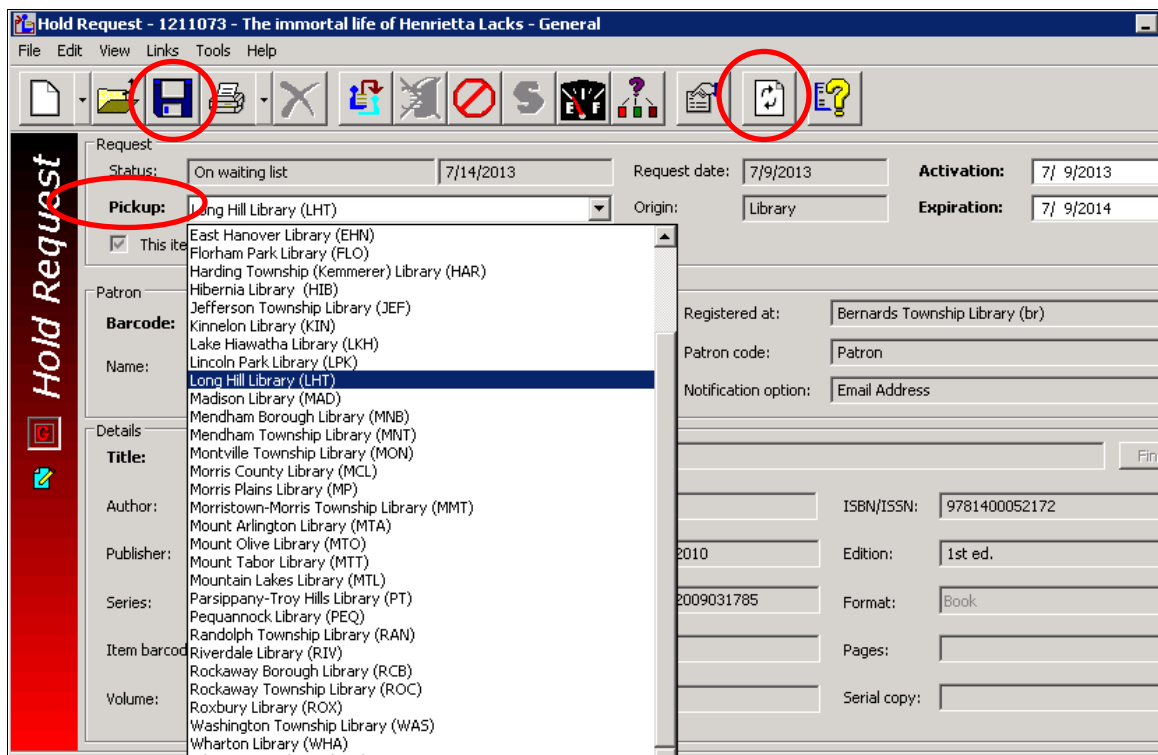
- Item Record** (vertical label on the left)
- Barcode:** 0103001180258
- Record status:** Final
- Checkboxes:** ILL, Ebook, Non-circulating, Display in PAC
- Title:** The immortal life of Henrietta Lacks
- Author:** Skloot, Rebecca, 1972-
- Call number:** 616.0277 SKL
- Price:** \$26.00
- Bib control no.:** 699702
- Item control no.:** 2502823
- Issue control:** (empty)
- Owner:** Long Hill Library (br)
- Assigned:** Long Hill Library (LHT)
- Collection:** Nonfiction (Nonfiction)
- Shelf location:** (None)
- Temporary location:** (empty)
- Circulation parameters:**
 - Material type:** Book
 - Loan period:** 28 days
 - Fine code:** .10/day
 - Renewal limit:** 2
 - Stat code:** Adult
 - Name of piece:** (empty)
- Request:**
 - Loanable outside system
 - Holdable
 - Limit to:**
 - Pickup at this branch
 - Patrons from this library and branches
 - Patrons from this branch only
 - Preferred borrowers

A modal dialog box titled "Polaris" is open in the center, displaying a warning icon and the message "This item is In-Transit to Long Hill Library (LHT)". The dialog has an "OK" button.

At the bottom of the window, there is a status bar with "For Help, press F1", "Read Only", and "NUM" buttons.

9. Return to the Hold Request for the patron. Refresh  the Hold Request. Use the dropdown list to **change the pickup location manually** to another library. **Save** the change.

If the physical item is not physically present, when the item is received at the original pickup library, a new In-Transit for Hold slip will print with the new pickup location. See the example below:



Hold Request - 1211073 - The immortal life of Henrietta Lacks - General

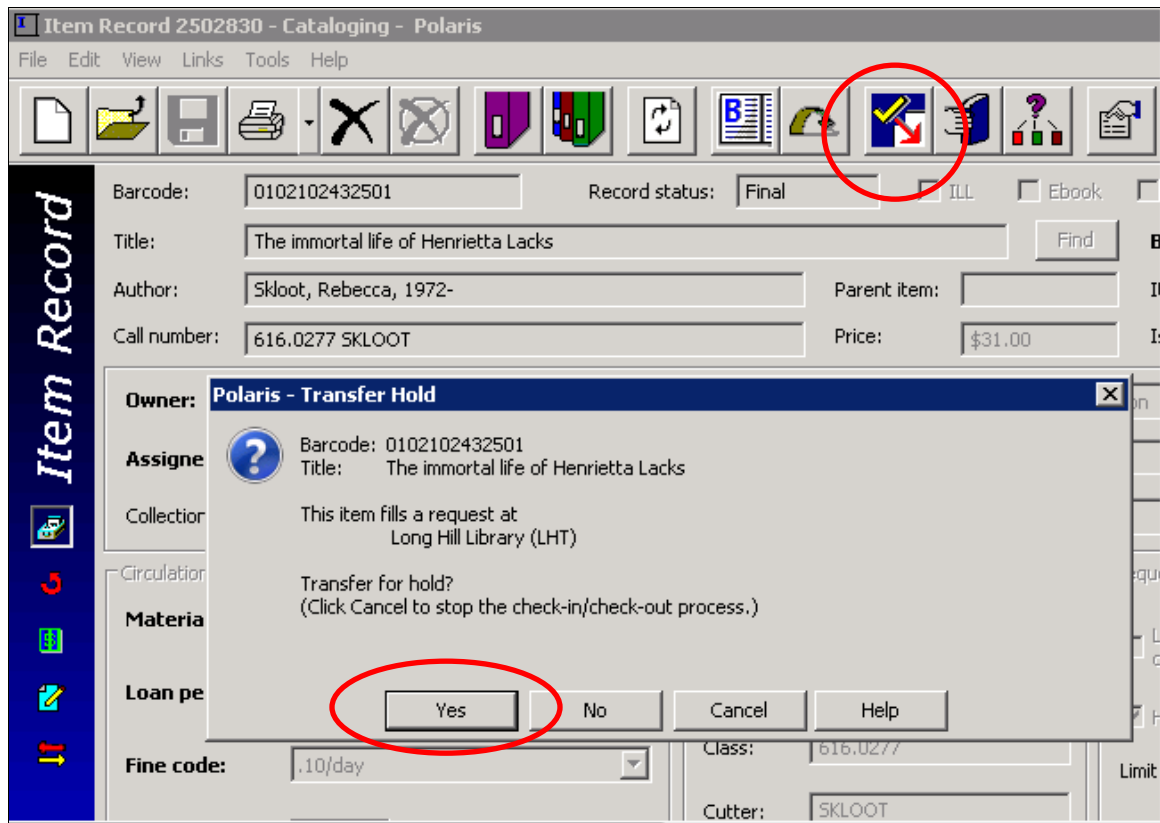
File Edit View Links Tools Help

Request
Status: On waiting list 7/14/2013 Request date: 7/9/2013 Activation: 7/ 9/2013
Pickup: Long Hill Library (LHT) Origin: Library Expiration: 7/ 9/2014

Patron: Bernards Township Library (br)
Barcode: Patron
Notification option: Email Address

Details
Title: The immortal life of Henrietta Lacks
Author: Lacks, Henrietta
Publisher: Random House
Series: The immortal life of Henrietta Lacks
Item barcode: 2010 2009031785
ISBN/ISSN: 9781400052172
Edition: 1st ed.
Format: Book
Pages:
Serial copy:

10. If the item is physically present, check-in the item a second time. A popup window labeled "Polaris - Transfer Hold" asks "Transfer for hold?" Answer YES and an In-Transit for Hold slip will be printed for the new pickup location. The item circulation status will show that it is transferred to the new pickup library. See example below:



11. When the item is checked in at the new pickup location, a Hold slip will print, and the hold pickup notice will be sent from the correct library.
12. If you need a list of all the items en route to a particular library, go to Request Manager, select the **Branch name:**, select **By: Item**, select **Status: En route**. See example below:

