Managing Hold Notifications

Patrons are able to set their own notification preferences for Holds. The notification methods are Telephone, Email, and Text message. Patrons can set default preferences for all holds when logged into their accounts in the catalog. They can also choose to change the notification method for each hold they place.

The patron's telephone number is included for all holds by default and is taken from the Daytime Phone field in the patron record. It is not presented as a choice for the patron. The telephone number should be used to notify the patron if email and text notification are not possible.

The phone and text notification preferences for any given hold are set at the time the hold is placed and stored with the hold. If changes are made to the phone number in the patron record, it will NOT automatically be updated in existing holds.

The notification fields that are stored as part of each hold can be chosen to show in the Staff Client on screens where holds are displayed using the Column Picker. The columns to choose are:

- Phone Notify – the phone number stored in the hold

- Email Notify – TRUE or FALSE, uses the email address in the patron record

- Text Notify – the text number stored in the hold

These fields also print out on the Hold Slip for trapped holds to indicate to staff how the patron is being notified.

Notification preferences for existing holds can be edited by staff. When viewing holds for a patron, the Actions for Selected holds menu has the following options staff can use to change notification methods for existing holds:

- Edit Phone Number – changes the notification phone number

- Edit Mobile/Text Carrier – changes the mobile carrier

- Edit Mobile/Text Number – changes the mobile number

- Set Email Notification– enables or disables email notification