

Cancelling Holds in CARL-X

Staff can cancel holds one of two ways: through the patron account OR through the item information. Please find instructions for both below.

Cancelling Holds through Patron Account

1. Log in to the patron's account either by scanning their barcode or searching for their name/birthdate.
2. Once in the patron account, click on the Summary tab. You should see a yellow lightbulb. Then click on the Requests radio button. This will show any holds a patron has.

The screenshot shows the patron account interface for TESTY ABIGAIL. The 'Summary' tab is selected, and the 'Requests (1)' radio button is chosen. A table displays one hold:

Title	Call Number	Identifier	Status	Due/NNA/Posted	Pickup At	Placed At	Queue Pos
The Mixed-up museum /		BID: 94558	Hold In Que	9/27/2022	OOAPL	ONLINE	1

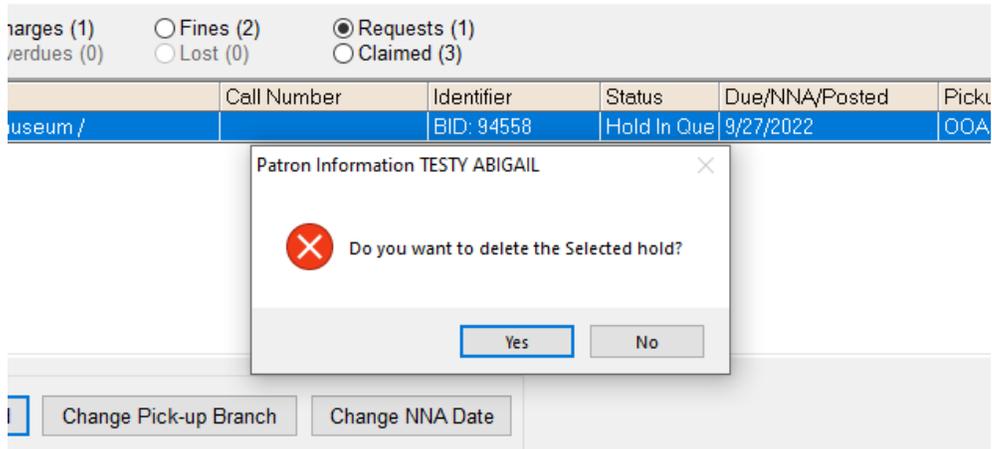
At the bottom left, the 'Cancel Hold' button is highlighted with a red box.

3. Highlight the item(s) that need cancelling. And click on "Cancel Hold" near the bottom left of the window.

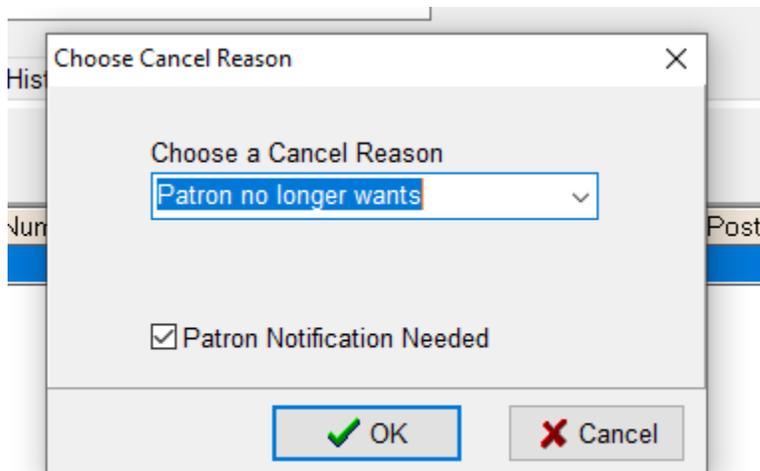
This is a close-up of the 'Cancel Hold' button, which is highlighted with a red box. The button is located at the bottom left of the interface, below the hold table.

4. You will be asked if you want to delete the selected hold. Click Yes. Or click No if you accidentally highlighted the wrong item(s).

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- When you click Yes, a Choose Cancel Reason window will come up. If the patron is aware of the cancellation, there is no need to notify the patron and the box can be unchecked. If the patron is unaware, leave the box checked and choose your reason. "Other" will let you enter in text. Click OK.



- The hold(s) will no longer be on the patron account.

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Cancelling Holds from the Item Information

1. In the Item Maintenance function, pull up your item by searching for the item number or the BID. Once you have the item, click on the Holds button.

Search

Key: Item Number Term(s): 38018001772639

Title: Residue /

Author: McGarrity, Michael

Call #:

BID: 667769 ISBN: 9781432860882 Pub Date: 2019

Circ History Counts

Circ: 3

Holds: 1

Cum Circ: 13

In House: 0

Title Level Holds

Current #: 0

Holds

Quick Maint

Branch	Location	Call Number	Item Number	Status	Date	Media	Circ Count	Holds Count	Cum Circ	In Hou:
NOOCF	ALRGP	MCG	38018001772639	Hold In Transit	9/24/2021	ABK	3	1	13	

2. Then click on the Title Queue button

Patron Information

Id: Type: Status:

Name: Retain Patron

Bibliographic Information

Key: CARL BID Terms: Retain Title

Hold Count: 0

Title: Residue / Call #:

Author: McGarrity, Michael BID: 667769

Item Information

Branch	Location	Call Number	Item Number	Status	Media
NOOCF	ALRGP	MCG	38018001772639	Hold In Transit	ABK

Title Queue

Place Hold

Item Queue

3. The hold queue will come up. All items against the title will come up. Staff can then go ahead and click "Delete All" or "Delete" depending on if all holds should be cancelled or just one.

Hold Queue for 'Residue /'

Number	Type	Patron ID	Patron Name	Date Placed	Pickup At	Placed At	NNA / SUD Exception
1	Inst Hold	21369006699880	TESTY EXETER JR	10/6/2021	OWLS	OWLS	10/6/2022

1

Change Position

Print

Delete All

Delete

Close

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4. Staff will be asked if they want to delete the selected holds? Click Yes.
5. When you click Yes, a Choose Cancel Reason window will come up. If the patron is aware of the cancellation, there is no need to notify the patron and the box can be unchecked. If the patron is unaware, leave the box checked and choose your reason. "Other" will let you enter in text. Click OK.