Hold Request Policy

Use this screen to create and edit hold request policies to be applied to your items.
To access this screen, sign in Service Configuration, open the WMS Circulation left navigation, select Holds and Schedules, and then select the Hold Request Policy link.

Overview

Use this screen to set hold request policies for items.

- Hold request policies are used to set how long hold requests remain active, the holds forwarding policy for libraries with multiple locations or branches, and if patrons can place holds on items they have checked out.

Libraries using WorldShare Circulation and WorldShare ILL integration: The Default Hold Request Period (see #2 below) will be in effect from the time the ILL request is placed until the item is received from the lender. Consider average ILL processing times when setting the Default Hold Request Period.

Create or edit hold request policies

1. On the Hold Request Policy screen, click Create New, or click the Policy Name you want to edit.
2. On the Create New or Edit Policy screen, fill in the fields in the order below:
   1. Policy Name: Name of the policy.
   2. Default Hold Request Period: How long holds remain active in the system.
      ◦ Holds will expire if they are not fulfilled within the chosen period.
   3. Hold Fixed Due Date(s): Hold fixed due dates are set dates holds will no longer be active in the system. For example, the last date of the semester.
      ◦ Hold fixed due dates have to be maintained on each hold request policy.
      ◦ You can enter multiple hold fixed due dates.
      ◦ If a hold fixed due date has passed, it will no longer apply.
      ◦ If a hold fixed due date is not found, the system will use the time set in Default Hold Request Period.
   4. Bill for placing hold: Fixed amount applied to the patron's account when a hold is placed. Create fixed bills on the Bill Structures screen.
      ◦ Patrons cannot place a hold in WorldCat Discovery if there is a bill associated with placing holds.
      ◦ If staff place a hold in WMS for a patron, they will need to, depending on their account type, override or acknowledge the bill amount due for placing the hold. See Circulation Account roles, Overrides for more information.
   5. Bill for expired hold: Fixed amount applied to the patron's account when a hold expires. Create fixed bills on the Bill Structures screen.
6. **Hold Request Expiration Notification Policy**: Select the hold request expiration notification that will be sent to the patron when their hold expires or is deleted.
   - Create hold request expiry notifications on the **Notification Policies** screen.
   - If you do not select a **Hold Shelf Expiration Notification Policy** on the **Hold Fulfillment Policy** screen, then the hold request expiration notification will also be sent to the patron when their item expires from the Hold Shelf (the patron failed to pick up their hold during the time set in the **Hold Shelf Period**).
   - For more information on deleting holds, see **Delete a hold from the item record** and **Delete a hold from a patron account**.

7. **Forwarding Policy**: Select the forwarding policy.
   Note: Using a Forwarding Policy that prefers pickup location may cause a patron's place in the hold queue not to be honored. If your library wants all holds to be fulfilled in queue order, then all Forwarding Policies should be set to **Globally Forwarded by default**.
   - **Globally forwarded by default**: When a hold is placed on an item and it is available at multiple branch locations, the item will appear on the **Pull list** for every branch that can fulfill the hold.
     - Allows any applicable item at any location to fulfill the hold.
     - Recommended for libraries with one branch or for libraries with multiple branches that prefer holds to be fulfilled in queue order.
   - **Prefers Pickup location if any items are available**: When the Forwarding Policy prefers items at the pickup location and there is an item available at the pickup location, then **only** items checked in at the pickup branch can fulfill the hold. If staff at the pickup location forward the hold or there are no items available at the pickup location, then relevant items checked in at any branch could be routed to fulfill the hold.
     - If staff determine that the hold cannot be fulfilled, they can forward the hold to the other branches.
     - If the item is not available at the pickup location, the hold can be forwarded to any branch and will appear on the **Pull list** for every branch that can fulfill the hold.
     - Recommended for libraries with multiple branches that prefer to reduce the number of items routed to fulfill holds at other branches.

8. **Hold can be placed if patron has item on loan**: Select whether patrons can place holds on items they have checked out.
   - **Hold can be placed**: Patrons can place holds on items they checked out.
   - **Hold can only be placed with an override**: Patrons cannot place holds on items they have checked out in WorldCat Discovery. Staff can place the hold for them, but, depending on the account type, will need to override or acknowledge the hold in WMS. See **Circulation Account roles, Overrides** for more information.

3. Click **Save**.

**Copy hold request policies**

1. Click the **Policy Name** you want to copy.
2. In the top right corner, click **Copy**. The copied policy appears.
3. Enter a policy name and edit any additional fields.
4. Click **Save**.
Delete hold request policies

Policies cannot be deleted if they are in use.

1. Click the **Policy Name** you want to delete.
2. In the top right corner, click **Delete**.
3. On the Confirm window, click **OK**.

Related policies

Hold Request Policy depends upon:

- Bill Structures
- Notification Policies

Hold Request Policy is used in:

- Hold Request Policy Map