



## How Holds Work Guide

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### Important Terminology

**Local Hold:** A hold placed on an item on your shelf by your patron.

**System Hold:** A hold placed on any item on one bib record.

**Interlibrary loan:** A request for an item by a patron or library outside RSA. For more information on this process, please see the [Items Requested by a Non-RSA Library Procedure](#).

**Copy Level Hold:** A hold that is placed on one specific item and no other item will fill it.

**Title Level Hold:** A hold that is placed on any item on a Bib Record of the item selected for the hold, not a specific Item ID.

**Reciprocity:** If you do not lend an item type, then you cannot request that item type for your patrons. RSA recommends that member libraries share all circulating item types. See [RSA Reciprocity Policy](#).

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Holds rely on several parameters to work. For a hold to be successfully placed, all the rules must allow the hold. Here is a quick overview of what the system is looking for to allow a hold.

- Title level holds look at all items on the BIB RECORD of the item ID provided when the hold was placed, not at the specific item ID used. Any holdable item on that bib record can fulfill the hold. WorkFlows defaults to Title Level Holds.
- Copy level holds look ONLY at the item ID given when placing the hold. NO OTHER COPY OF THE TITLE CAN FILL THE HOLD even if multiple other copies are available. This is why it is important to pull the item ID found on the picklist and not just the same title.

Steps WorkFlows uses when a hold is placed:

1. Can the patron check out the item in their library or the hold pickup library (if

different from their home library)?

- a. A library's copy of a title will fill their patron's holds before being placed in transit to another library. If your title is out at a borrowing library and one of your patrons places a hold the title will come back to your library when it is discharged if the hold has not been filled.
    - Your Local Hold only item may go in transit to another library if the hold is for your patron and your patron selected a different pickup library.
  - b. If the circ rules for the checkout library (user library or pickup library) would allow the patron to check the item out, the system continues to look at the hold. If not, the hold fails at this point.
  - c. At this point, it is a simple decision based on item type and user type. If your JUV cards are blocked from checking out item type DVD, then all DVD item type holds would be blocked.
  - d. Since not all libraries use the same item types for each item, by default, all item types are allowed to be checked out by all user profiles in all libraries. If this were not allowed, your patrons would only be allowed to check out the item types used in your library. If you used item type BOOK for all book items, not allowing all item types would mean no holds on BOOK-PBK, BOOK-LPRNT, etc.
  - e. Item checkout limits also affect the number of holds a patron can have filled. If a patron is limited to 5 DVD checkouts, then the system will not transit an item to fill a DVD hold unless the patron has an available checkout (4 or less DVDs checked out).
2. Can the patron check out the item from any of the libraries on the selected bib record (if title level hold) or the selected library for copy level holds?
- a. By default, school/academic libraries can borrow from other school/academic libraries and public libraries can borrow from other public libraries. By default, there are no holds allowed between school/academics and public libraries.
  - b. Allowing all libraries to borrow your materials does not allow your patrons to borrow from all other libraries. The rules are based on each library's wishes.
  - c. The RSA Website (on the [Membership List page](#)) has a complete and up-to-date listing of each RSA member library's holds group; Public, School/Academic, or All.
  - d. "Hold Not Allowed" cannot be overridden. These hold groups are the master gatekeepers for who borrows from whom. Please consider allowing holds to all libraries if you can. The more libraries that allow anybody to hold their items the better.
3. Are any of the remaining items being considered blocked by the holds map?
- a. The final act of the holds process is running through the hold map.
  - b. The hold map works by library, item type, and user profile. It is a blocking map meaning that all items can be held by default but can be blocked specifically.

- c. The most blocked item types are the NEW item types (N-BK, N-DVD, etc.).
- d. Some libraries only allow local holds for certain items like new items, kits, equipment like hotspots, and Library of Things. Holds on these items can only be placed by patrons of the item-owning library. The patron can choose a different pickup library. If they do, and you don't transit those items, then the item-owning library needs to contact the patron.
- e. The RSA Support Site Holds Parameters page has a current listing of the hold map. You can use it to see what libraries are blocking individual item types. <https://support.librariesofrsa.org/project/holds-parameters/>

At this point the system has looked at the patron to see if they can check out the item (not blocked or barred and can legally check out the item), then looked to see if the item (copy level) or items (title level) were available to be held and removed all items in libraries not in the patron's holds group. Then the system filters one last time by the holds map and selects an item to fill the hold from the remaining eligible items.

- 4. Once the hold is placed, it will appear on the selected library's picklist after the next run of the pick list. The hold will remain on that picklist until the library pulls the item and traps the hold or checks the item out to another patron or marks the item as lost or missing. However, if another library checks in an item on the same bib record as that hold, the system will try to grab and transit that item to fill the hold quicker. The item would then be removed from the next run of the pick list.
  - a. If an item-owning library is closed the day the pick list runs, it will select an item from an open library. This is one reason why your library's on-shelf item would not be selected to fill the hold.
  - b. See [Why didn't my patron's hold get filled by my item? A Guide](#)

Questions? Contact the RSA Help Desk at [help@rsanfp.org](mailto:help@rsanfp.org) or at 866-940-4083.