



## Placing Holds Guide

Last updated April 11, 2025

There is a video to accompany this Guide:

<https://www.youtube.com/watch?v=2NH5iPzhUvg>.

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### Related documents

[How Holds Work Guide](#)

Processing Holds Guide

[RSA Reciprocity Policy](#)

[Printed Documents Including Patron PII](#)

[Why didn't my item fill my patron's hold? A Guide](#)

### Notes:

- RSA member libraries cannot place a system-wide hold for non-RSA member libraries. i.e., an RSA member public library cannot place a hold for the local non-RSA school library.
- Do not delete a hold without the patron's permission or without informing the patron's home library.

### Important Terminology

**Title Level Hold:** Any holdable item on a bib record can fill the hold.

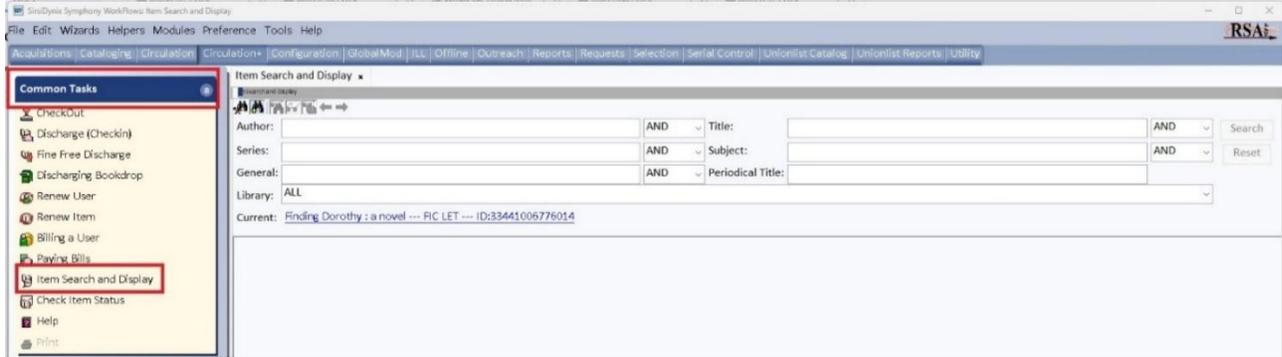
**Copy Level Hold:** Only the selected Item ID will fill the hold.

**System-wide hold:** A hold on all holdable items from any library can fill the hold

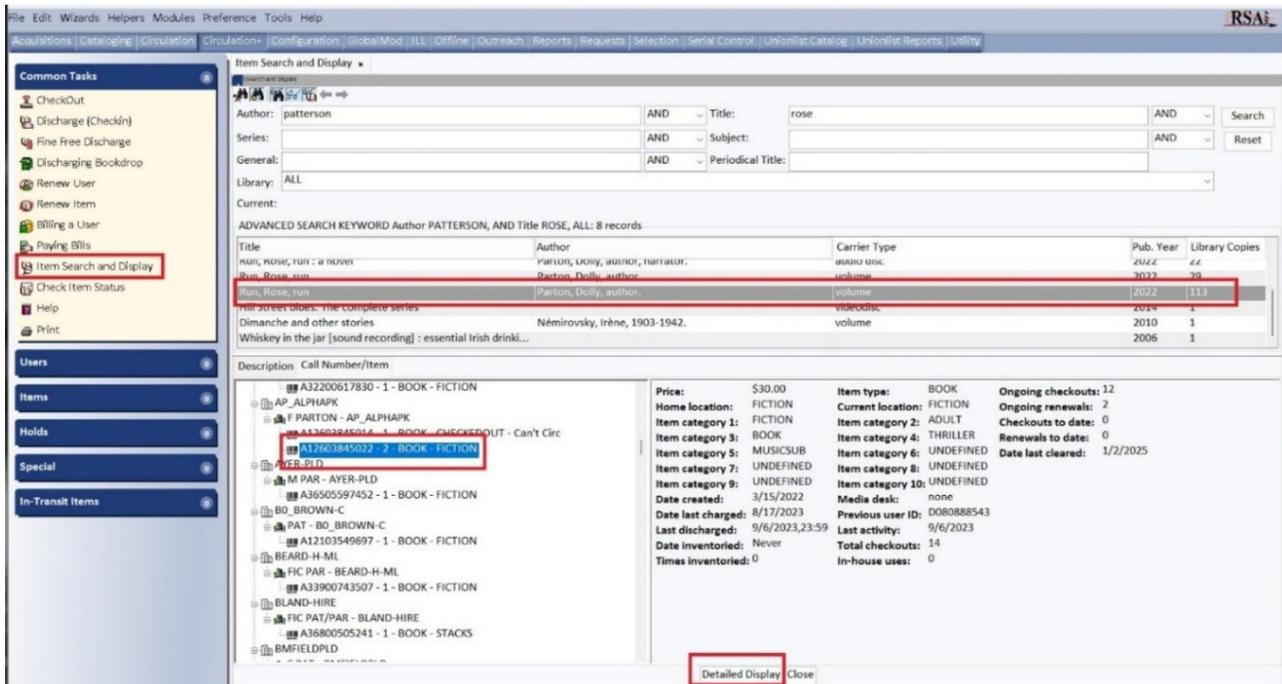
## Search for the Item

Placing a hold starts with searching for the item requested.

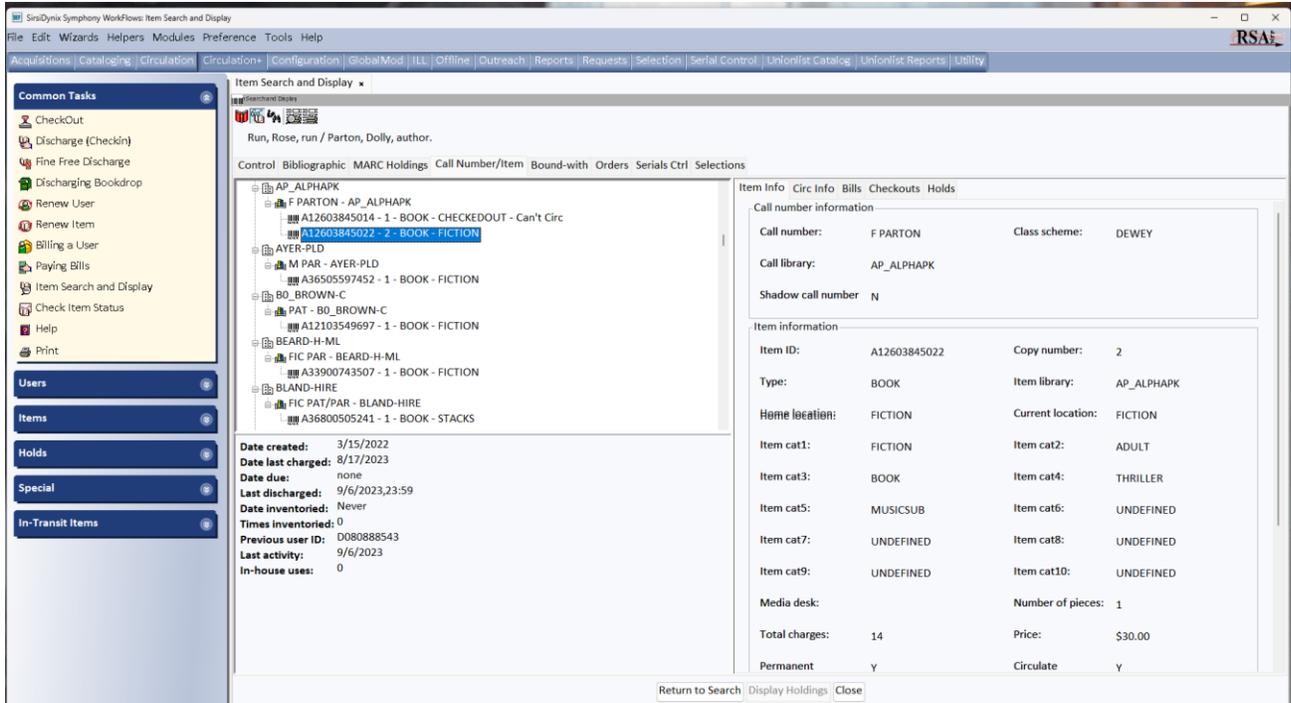
Use Circulation+>Common Tasks>Item Search and Display to search for the item requested by the patron. If the search defaults to your library and you don't have the item, or need a different format, change the search library to ALL. See **Item Search and Display Guide [link]** for details on searching in Workflows.



Once the item is found in Item Search and Display **choose Detailed Display** to make the item the current item.

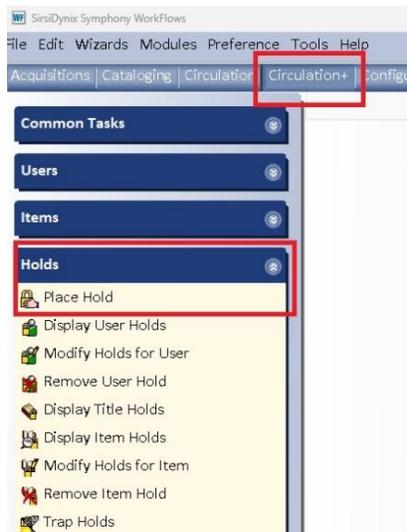


Detailed Display shows all items on the title record under the Call Number/Item tab, including details about each item. **The item is now the “current item.”**



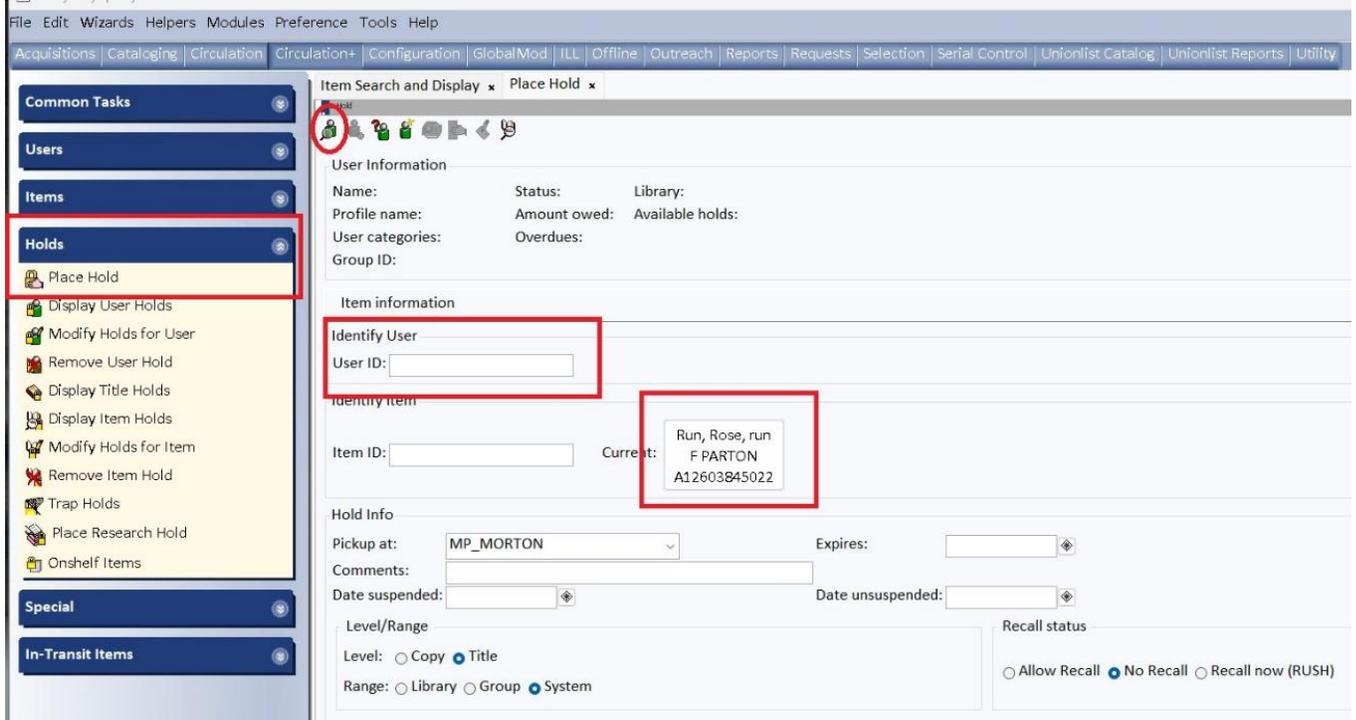
## Place Hold

- In Circulation+>Holds Group choose Place Hold

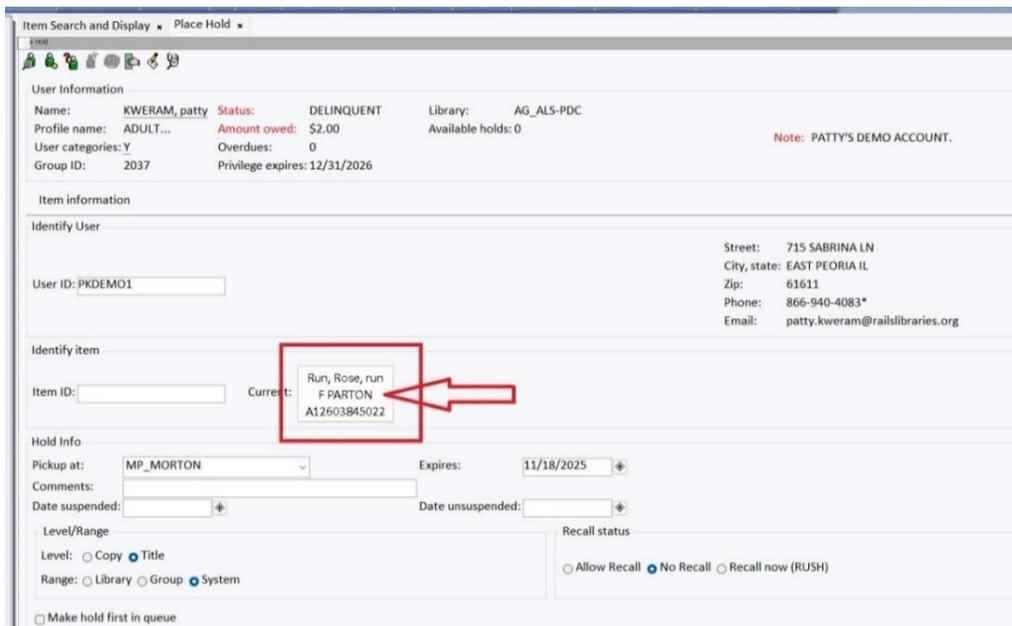


- Scan the User Id or use the User Search helper  to search for the user. If using the helper, verify that it's the correct patron.

Resource Sharing Alliance



Note that the item that was just searched is the Current item. Click on the current item to enter it in the Item ID box. This item is a placeholder for any holdable item on the record when placing a Title Hold. This is not necessarily the item that will fill the hold.



### Verify the information

Confirm the patron's contact information. If they have an email, they will get an email when the hold is available. If there is no email, they will need a phone call. Confirm the pickup library, which defaults to your library or their home library, depending on settings.

Item Search and Display x Place Hold x

User Information  
Name: KWERAM, patty Status: DELINQUENT Library: AG\_ALS-PDC  
Profile name: ADULT... Amount owed: \$2.00 Available holds: 0  
User categories: Y Overdues: 0 Note: PATTY'S DEMO ACCOUNT.  
Group ID: 2037 Privilege expires: 12/31/2026

Run, Rose, run / Parton, Dolly, author.  
FIC PAR Copy:1 ID:A36701143774

Identify User  
User ID: PKDEMO1  
Street: 715 SABRINA LN  
City, state: EAST PEORIA IL  
Zip: 61611  
Phone: 866-940-4083\*  
Email: patty.kweram@railibraries.org

Identify item  
Item ID: A36701143774

Hold Info  
Pickup at: MP\_MORTON Expires: 11/18/2025  
Comments:  
Date suspended: Date unsuspended:  
Level/Range  
Level:  Copy  Title  
Range:  Library  Group  System  
Recall status  
 Allow Recall  No Recall  Recall now (RUSH)  
 Make hold first in queue

Get User Information Get Item Information (I) Place Hold Place Hold for Another User Close

Expires: 11/18/2025

This is the date that the hold request will drop out of Workflows if the hold is never filled, usually 300 days from the date the hold is placed. No need to change this date.

Comments: place at drive up window  
Date suspended: 01/28/2025 Date unsuspended: 02/02/2025

Optionally, you may enter a comment and/or suspension dates (so they won't lose their place on the hold list should it be ready when they aren't able to pick up the hold). You can suspend a hold in Workflows after it has been placed, or the patron can suspend the hold in RSACat.

<b>Level/Range</b> Level: <input type="radio"/> Copy <input checked="" type="radio"/> Title Range: <input type="radio"/> Library <input type="radio"/> Group <input checked="" type="radio"/> System	<b>Recall status</b> <input type="radio"/> Allow Recall <input checked="" type="radio"/> No Recall <input type="radio"/> Recall now (RUSH)
<input type="checkbox"/> Make hold first in queue	

The above defaults should only be changed under special circumstances.

**Level:**

A TITLE LEVEL HOLD means that any holdable item on the record can fill the hold. The Item ID is only a placeholder for any item on that record.

A COPY LEVEL HOLD means that only the item ID selected will fill that hold. Use for circumstances like placing a hold on your library's item that needs attention, like repair or relabeling.

**Range:**

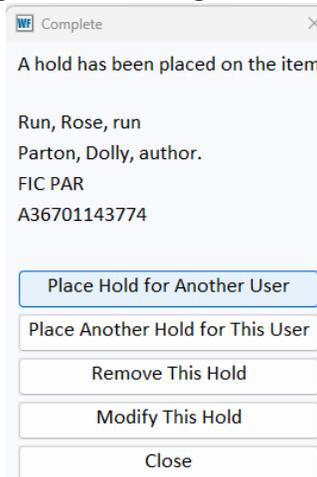
A SYSTEM LEVEL HOLD means any holdable item. A GROUP LEVEL HOLD may be used to choose items from only your library plus your library branches to fill the hold.

Once you have verified the information, select PLACE HOLD.

The screenshot shows a library system interface with the following details:

- Item ID: A12603845022
- Hold Info section:
  - Pickup at: MP\_MORTON
  - Expires: 11/18/2025
  - Comments: place at drive-up window
  - Date suspended: 1/28/2025
  - Date unsuspended: 2/2/2025
- Level/Range section:
  - Level:  Copy  Title
  - Range:  Library  Group  System
- Recall status section:
  - Allow Recall  No Recall  Recall now (RUSH)
- Make hold first in queue
- Buttons at the bottom: Get User Information, Get Item Information (b), **Place Hold** (highlighted in red), Place Hold for Another User, Close

If the hold is successful, you will get this message:



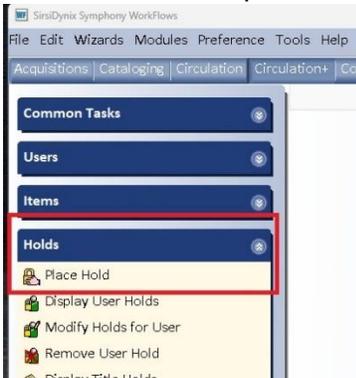
If the hold is not allowed, you will get this message:



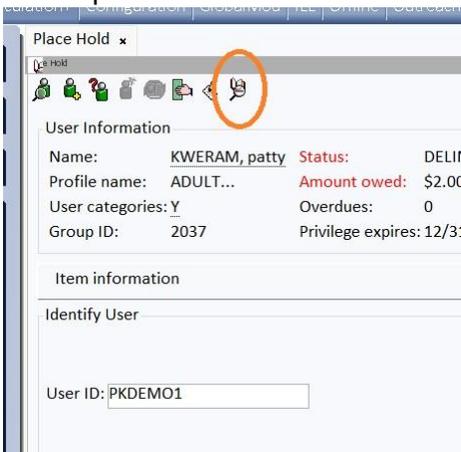
The standard override will not work. You can look for the item on another record to place the hold. Or you can call the owning library to see if they are willing to send the item for your patron. The owning library may be able to place the hold in Workflows, depending on their hold rules.

### **Alternate way to place holds**

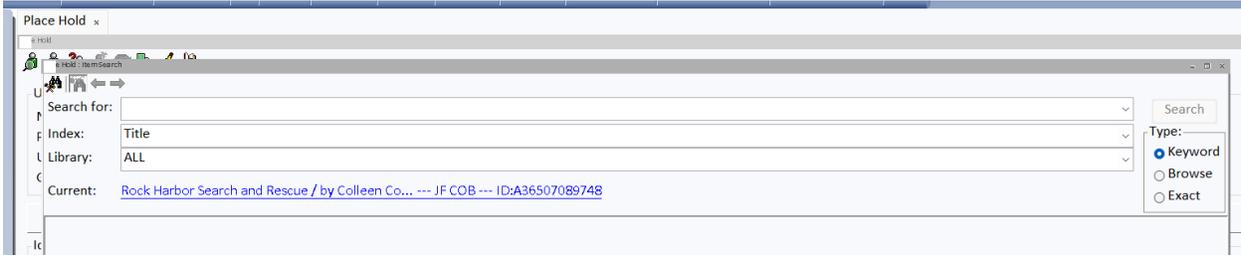
In the Holds Group, Choose Place Hold.



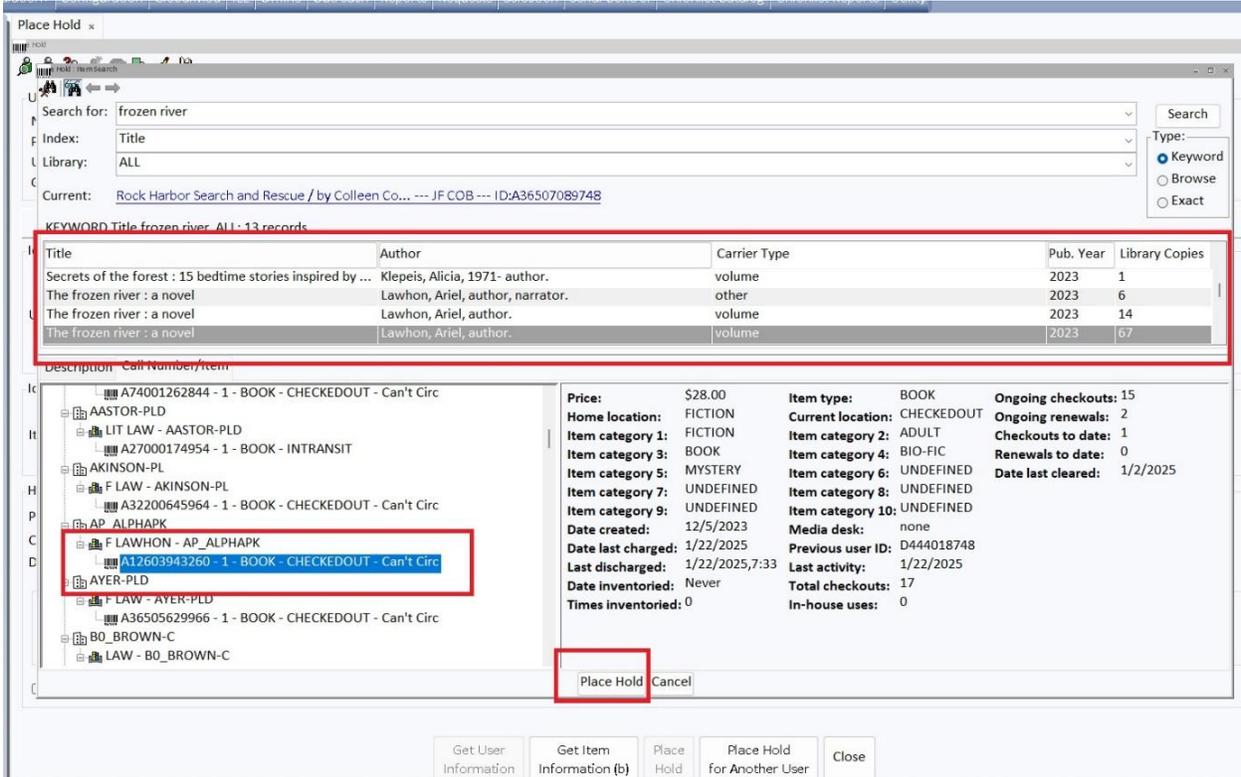
Scan or enter patron information in User ID. Use the Item Search helper  to search for the requested item.



This will open an Item Search box. Search for the item requested. See **Item Search and Display Guide** for details.



Select the item and choose Place Hold. The hold isn't completed yet!



Remember that any holdable item on that record may fill a system-wide hold. Verify patron and pickup information. Then choose Place Hold.

Place Hold

User Information  
Name: KWERAM, patty Status: DELINQUENT Library: AG\_ALS-POC  
Profile name: ADULT... Amount owed: \$2.00 Available holds: 0  
User categories: Y Overdues: 0 Note: PATTY'S DEMO ACCOUNT.  
Group ID: 2037 Privilege expires: 12/31/2026

The frozen river : a novel / Lawhon, Ariel, author.  
F.LAWHON Copy3 ID:A12603941260

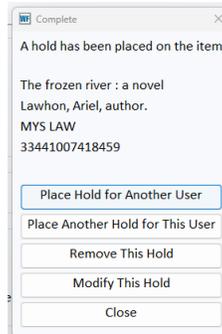
Identify User  
User ID: PKDEMO1 Street: 715 SABRINA LN  
City, state: EAST PEORIA IL  
Zip: 61611  
Phone: 866-940-4083\*  
Email: patty.kweram@trailslibraries.org

Identify Item  
Item ID: A12603941260

Hold info  
Pickup at: MP\_MORTON Expires: 11/29/2025  
Comments:  
Date suspended: Date unsuspended:  
Level/Range  
Level:  Copy  Title  
Range:  Library  Group  System  
Recall status  
 Allow Recall  No Recall  Recall now (RUSH)  
 Make hold first in queue

Get User Information Get Item Information **Place Hold** Place Hold for Another User Close

If successful you will get this message:



## Modify Holds

Select Modify Holds for User. Only some aspects of an existing hold may be modified.

File Edit Wizards Helpers Modules Preference Tools Help

Acquisitions | Cataloging | Circulation | Circulation+ | Configuration | GlobalMod | ILL | Offline | Outreach | Reports | Re...

Common Tasks

Users

Items

**Holds**

Place Hold  
Display User Holds  
**Modify Holds for User**  
Remove User Hold  
Display Title Holds  
Display Item Holds  
Modify Holds for Item  
Remove Item Hold  
Trap Holds  
Place Research Hold  
Onshelf Items

Modify Holds for User

User Information  
Name: KWERAM, patty Status: DELINQUENT Library: AG\_ALS-POC  
Profile name: ADULT... Amount owed: \$2.00 Available holds: 0  
User categories: Y Overdues: 0  
Group ID: 2037

Identify User  
User ID: Current: KWERAM, patty  
PKDEMO1

List of Holds  
 Select All

Modify	Title	Recall	Pickup at
--------	-------	--------	-----------

Scan the User barcode or use the User Search Helper to see the list of active holds.

**Modify Holds for User**

My holds for user

**User Information**

Name: KWERAM, patty Status: DELINQUENT Library: Available holds: 0  
Profile name: Amount owed: \$2.00  
User categories: NONE Overdues: 0 Note: PATTY'S DEMO ACCOUNT.  
Group ID: 2037

**Identify User**

User ID: PKDEMO1

Street: 715 SABRINA LN  
City, state: EAST PEORIA IL  
Zip: 61611  
Phone: 866-940-4083\*  
Email: patty.kweram@railslibraries.org

**List of Holds**

Select All

Modify	Title	Recall	Pickup at	Pickup by	Expires	Status	Comment	Record Status	Suspended	Unsusended
<input type="checkbox"/>	The frozen river ...	NO	MP_MORTON		11/20/2025	(unavailable)			NEVER	NEVER
<input type="checkbox"/>	The small and th...	NO	MP_MORTON		11/20/2025	(unavailable)			NEVER	NEVER
<input type="checkbox"/>	How we learn to...	NO	MP_MORTON		11/20/2025	(unavailable)			NEVER	NEVER

Select the hold to modify and choose Modify.

**Modify Holds for User**

My holds for user

**User Information**

Name: KWERAM, patty Status: DELINQUENT Library: Available holds: 0  
Profile name: Amount owed: \$2.00  
User categories: NONE Overdues: 0 Note: PATTY'S DEMO ACCOUNT.  
Group ID: 2037

**Identify User**

User ID: PKDEMO1

Street: 715 SABRINA LN  
City, state: EAST PEORIA IL  
Zip: 61611  
Phone: 866-940-4083\*  
Email: patty.kweram@railslibraries.org

**List of Holds**

Select All

Modify	Title	Recall	Pickup at	Pickup by	Expires	Status	Comment	Record Status	Suspended	Unsusended
<input checked="" type="checkbox"/>	The frozen river ...	NO	MP_MORTON		11/20/2025	(unavailable)			NEVER	NEVER
<input type="checkbox"/>	The small and th...	NO	MP_MORTON		11/20/2025	(unavailable)			NEVER	NEVER
<input type="checkbox"/>	How we learn to...	NO	MP_MORTON		11/20/2025	(unavailable)			NEVER	NEVER

Get User Information **Modify** Modify Another User's Holds Close

Only certain details may be modified, typically the pickup library or suspension dates.

**Modify Holds for User**

Modify Holds for User: KWERAM, patty

**Modify Holds Fields**

Allow Recall  No Recall  Recall now (RUSH)

Pickup at: W0\_WASH-PL Expires: [ ]

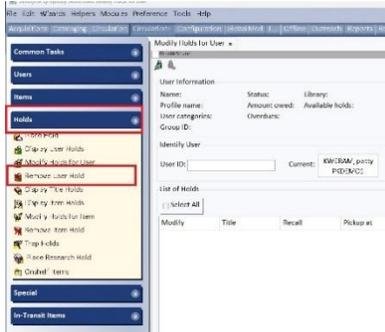
Date suspended: 1/31/2025 Date unsusended: 02/07/2025

Comment:  Append  Replace  Remove

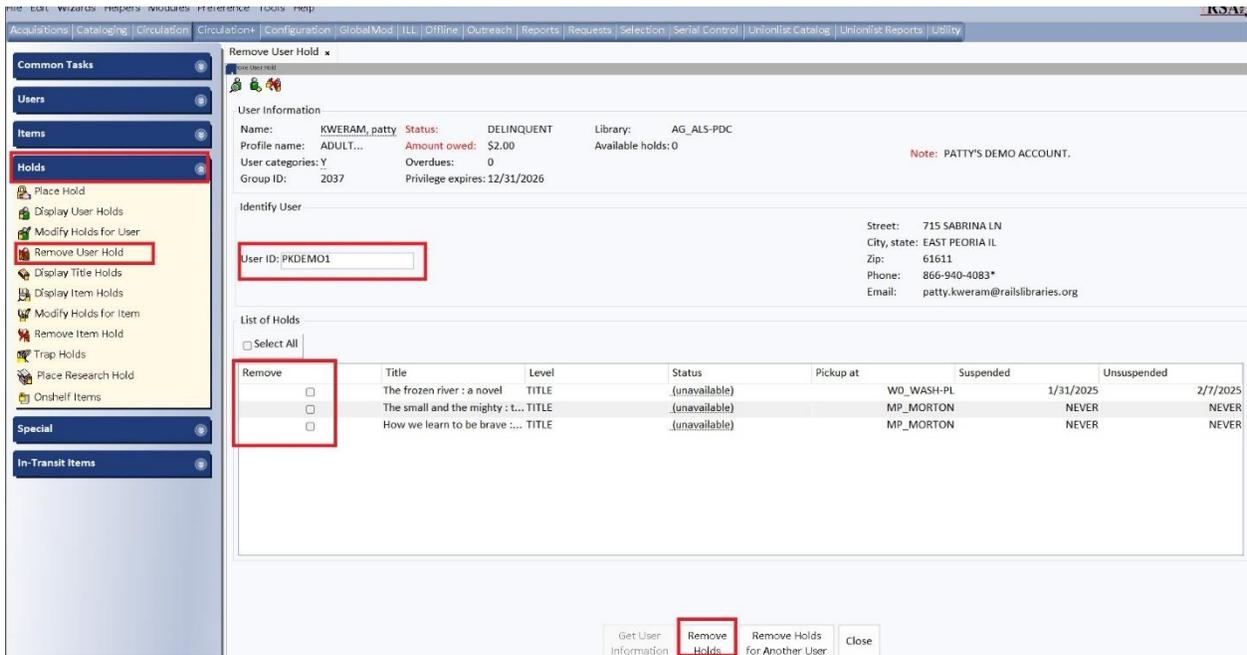
The patron may also modify holds using their RSAcat account.

## Remove User Holds

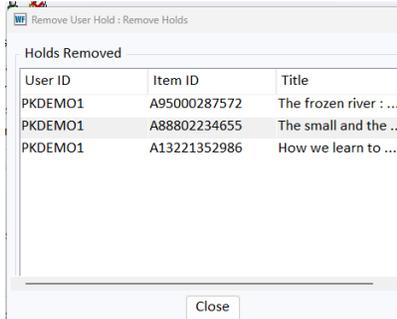
Use when a patron no longer wants to wait for a hold.  
Choose Remove User Hold in the Holds group.



Scan or enter the User ID to see a list of active holds. Select the box next to the hold to be removed. Choose Remove Hold.



A confirmation will appear:

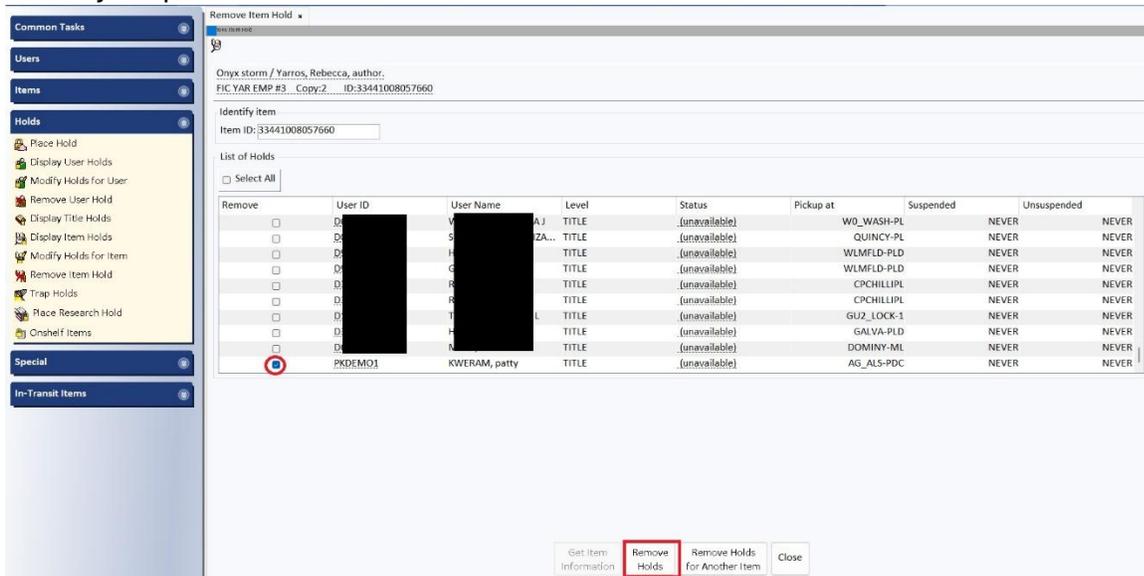


## Remove Item Holds

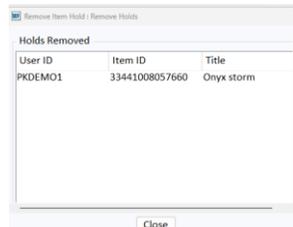
Use when you have the physical item that the patron no longer needs. **Care must be taken to remove the hold for the correct patron when the item has more than one hold on it.** In the Holds group, choose Remove Item Hold.



Scan the item. A list of TITLE and COPY holds on that item will appear. **MAKE SURE** to select your patron's hold!

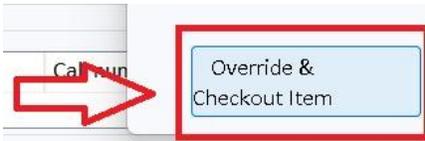
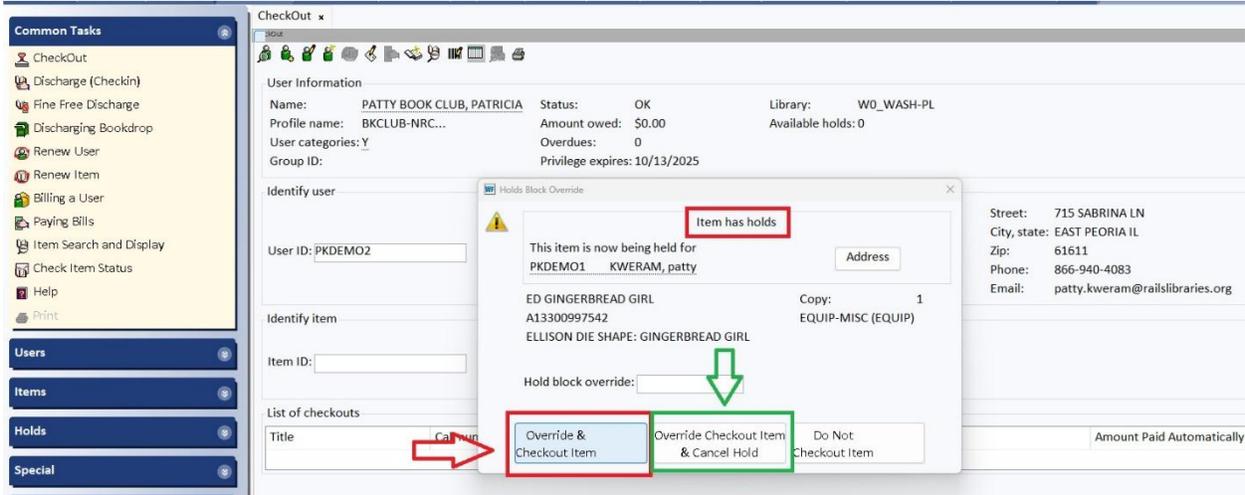


Select the box next to the correct patron's hold and choose Remove Holds. Ensure that the correct hold was removed in the confirmation box.



## Tips and Tricks

When checking out an item that has an available hold, a pop-up box appears. Which do you choose and why?



Use **Override & Checkout Item** and enter the standard override when a patron wants to check out the item. A patron with the item in hand has priority over the hold.

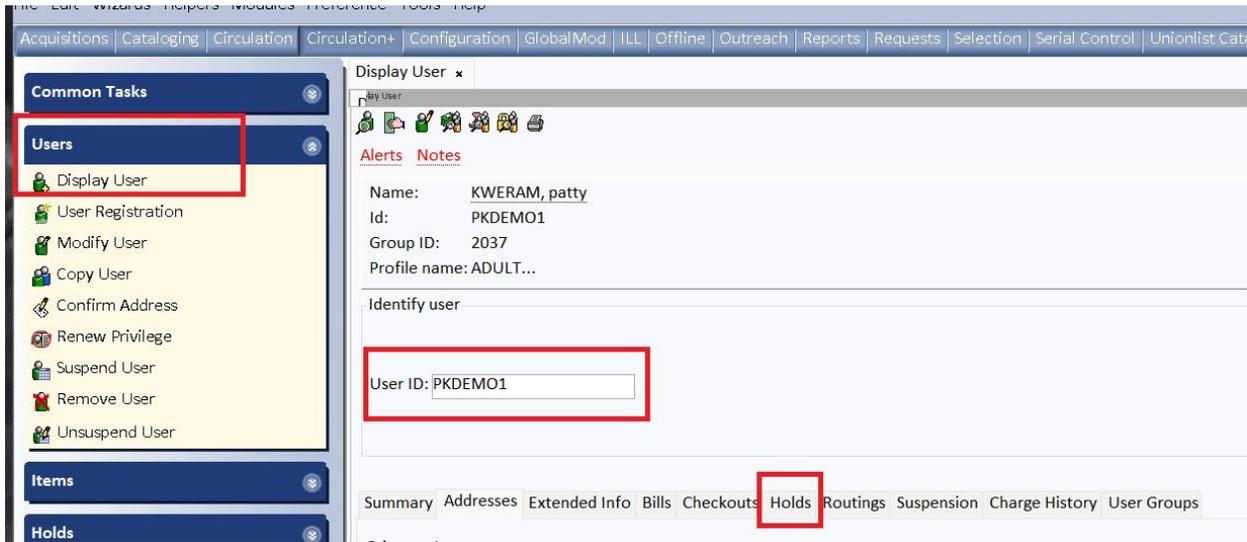


Use **Override Checkout Item & Cancel Hold** and enter the standard override when you are checking out to a patron's family member, like when a parent is checking out an item that is being held on their child's account. **Follow your library policy when choosing this. Your library may require the person picking up the hold to use the library card the hold was placed on.**

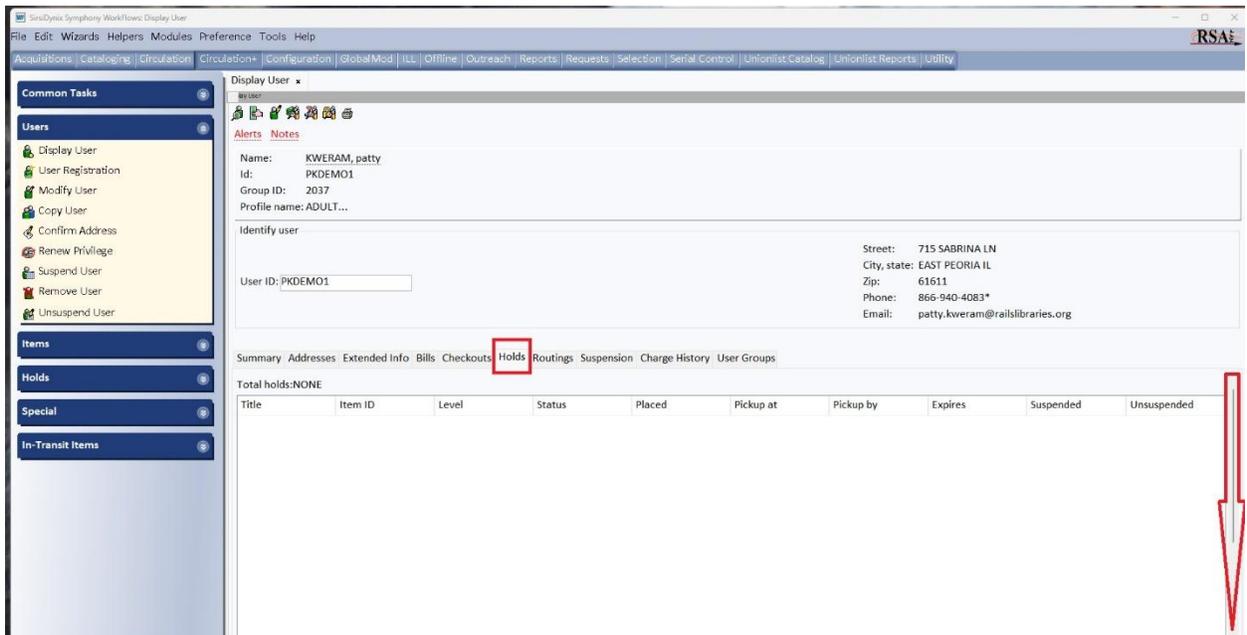
See previous holds

A patron doesn't pick up their hold before the pickup-by date and it is returned/sent to fill the next hold. Or they want to place it on hold again. Find the information in Workflows!

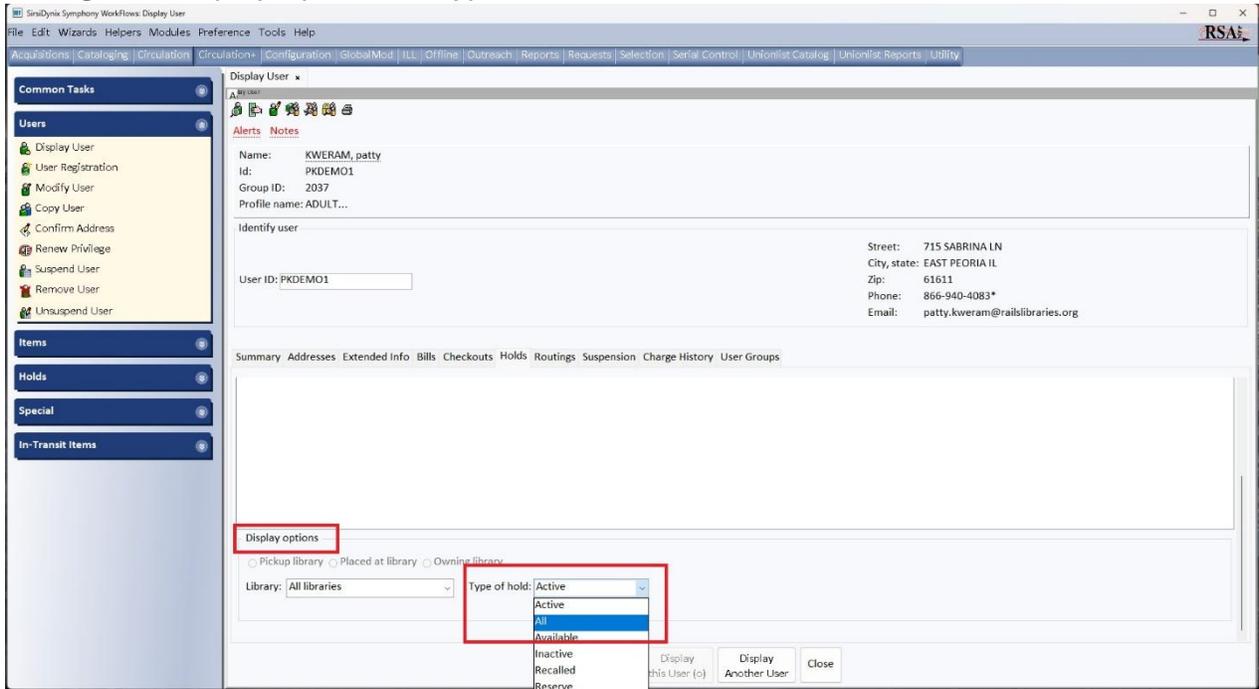
In Circulation+, Users Group, choose Display user and enter the patron information. Choose the Holds tab.



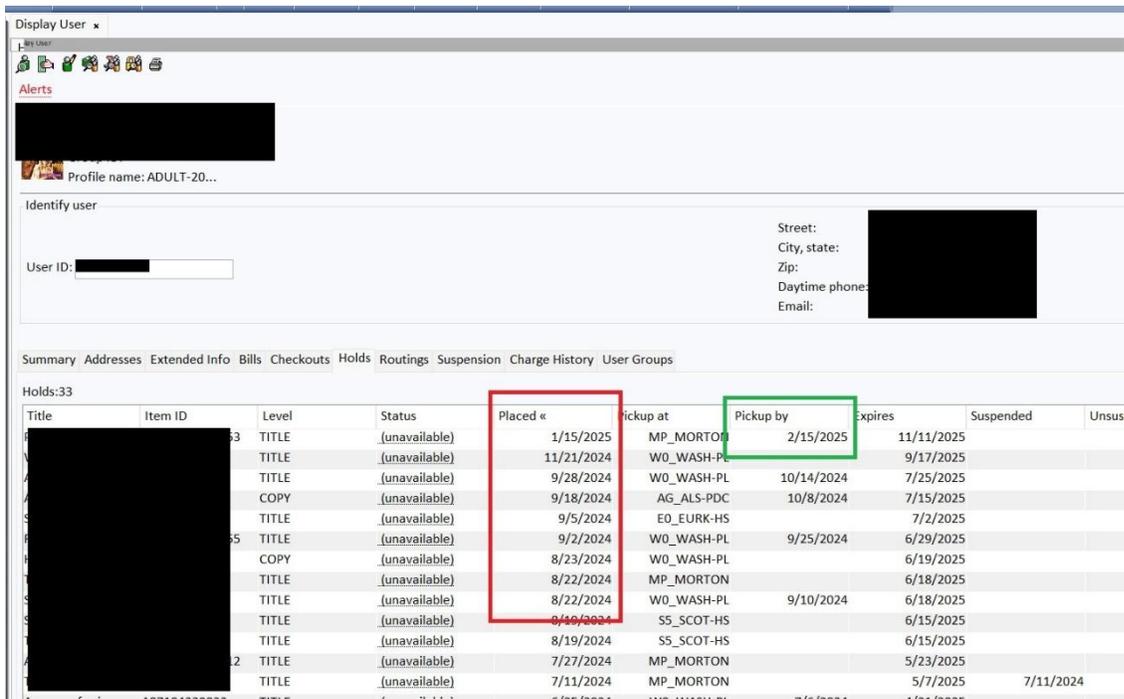
Use the scroll bar on the right to scroll to the bottom of the holds page.



Change the Display Options for Type of Hold from Active to All.



All the holds will be listed. Select a column heading to sort the list of holds. For a hold that had been available it will show the pickup library and the pickup-by date. (Note that sorting doesn't work when there have been blanket holds on the account).



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