Edit or delete hold

Find information about editing and deleting holds in WorldShare Circulation.

**Edit a hold from a patron account**

In the left panel under Assist Patrons search for the patron to edit their hold. Enter the patron barcode to search or use search with a different index. Click on the patron name to view their details.

1. On the patron record, click the **Holds** tab.
2. On the Holds tab, in the title column for the hold you want to edit, click **Edit**.
3. In the Edit Existing Hold Request window, change the information as needed.
   - **Patron** - The name of the current patron.
   - **Item** - The title of the item on hold.
   - **Pickup Institution** - The institution to pick up the item.
   - **Pickup Branch** - The available Branches to pick up the item.
   - **Pickup Location** - Select a Pickup Location to specify a specific location within the branch to retrieve materials. Staff will see all branches and branch locations in the list of pickup locations. The system will alert staff if a pickup option is not allowed by policy.
     - Additional Pickup Locations are configured for the selected Pickup Branch in the **Branch Locations** section of the OCLC Service Configuration and are available as configured in the **Hold Pickup Locations Map**.
   - **Declined By** - The name of the library or branch that did not fill the hold.
   - **Created:** - System supplied date the hold was created.
   - **Hold** - To change the expiration date, click the calendar button and select a date.
   - **Suspend** - If the patron does not need the item between certain dates, specify the starting and ending dates using the calendar button.
   - **Move patron to top of queue** - Makes the patron the first person in the holds queue for the item.
   - **Recall item from** - Check the box to recall the item from the current patron who has it on loan. The item record's Status field will indicate the item has been recalled.
   - **Notes** (optional) - Provide additional details about the patron's request before and/or after the hold has been fulfilled.
     - Public:
       - Contains text entered by a library user when placing a hold from WorldCat Discovery.
       - Staff can optionally add or edit a note on any hold request to provide additional details about the user's request before and/or after the hold has been fulfilled.
       - Hold notes are visible to patrons when logged into WorldCat Discovery>My Account via Edit Request. See **My Account**.
     - Staff:
• Contains text entered by library staff to provide additional details about the request before and/or after the hold is ready for pickup.

• The staff hold note will display on the Pull List, Holds for Review report, in the patron's hold queue, and when viewing or editing hold details. The staff note can also be added to the Pull List Entry receipt.

4. Click **Save Changes**. A message displays verifying the hold was updated.

**Edit a hold request for an item on the hold shelf**

Alter the time an item will remain on the hold shelf or change the pickup location for an item already on the hold shelf.

Note: Changes to the shelf expiry date can be made only while the hold is still active. Once the expiry date has passed, you will not be able to extend the shelf period.

From the patron record:

1. Click the **Holds** tab.
2. On the Holds tab, in the title column for the hold you want to edit, click **Edit**.
3. In the **Edit Existing Hold Request** window, change the information as needed.

   1. **Pickup**: Select the preferred library from the list.
   2. **On shelf**: Change the date and time when the held item will expire on the hold shelf if not picked up by the requesting patron.
      
      Note: Changes to the shelf expiry date can be made only while the hold is still active. Once the expiry date has passed, you will not be able to extend the shelf period. Consider monitoring the Holds Ready for Pickup Report for holds that will expire soon.

3. **Notes** (optional): Provide additional details about the patron's request before and/or after the hold has been fulfilled.

   • **Public**:
      
      ▪ Contains text entered by a library user when placing a hold from WorldCat Discovery.
      
      ▪ Staff can optionally add or edit a note on any hold request to provide additional details about the user's request before and/or after the hold has been fulfilled.
      
      ▪ Hold notes are visible to patrons when logged into WorldCat Discovery>My Account via Edit Request. See [My Account](https://help.oclc.org/Library_Management/WorldShare_Circulation/Holds_management/040Edit_or_delete_hold).

   • **Staff**:  
      
      ▪ Contains text entered by library staff to provide additional details about the request before and/or after the hold is ready for pickup.
      
      ▪ The staff hold note will display on the Pull List, Holds for Review report, in the patron's hold queue, and when viewing or editing hold details. The staff note can also be added to the Pull List Entry receipt.

4. Click **Save Changes**.

**Delete a hold from a patron account**

Deleting a hold will trigger a hold expiration notification to the patron. You cannot delete a hold if the item's status is In
Transit.

1. On the left panel, use Assist Patrons to retrieve the patron record. On the patron record screen, click the **Holdst** tab.
2. On the Holds tab, in the first column on the left, click the check box in the row of the hold you want to delete. In the lower left corner, Delete Holds becomes active.
3. In the lower left corner, click **Delete Holds**. A message displays verifying the hold was deleted. The item is removed from the Holds area.

Items on the hold shelf that have been canceled or expired will need to be cleared. See [Clear hold shelf](https://help.oclc.org/Library_Management/WorldShare_Circulation/Holds_management/040Edit_or_delete_hold) for more information.

### Delete a hold from the item record

Deleting a hold will trigger a hold expiration notification to the patron. You cannot delete a hold if the item's status is In Transit.

1. On the Copies screen, in the upper right corner, click **Holds**.
2. On the Holds screen, in the leftmost column, click the check box. In the upper right corner, Delete Hold Request becomes active.
3. In the upper right corner, click **Delete Hold Request**. The item is removed from the Holds Queue.

Items on the hold shelf that have been canceled or expired will need to be cleared. See [Clear hold shelf](https://help.oclc.org/Library_Management/WorldShare_Circulation/Holds_management/040Edit_or_delete_hold) for more information.

### Configure columns

**Note:** Preferences are retained per your user account.

1. On the right side of the screen, click the **User Preferences button** (⚙).
2. In the Show Columns window, check or uncheck the columns you want to show or hide.
   - The columns you checked or unchecked are shown or hidden.
   - Select **All** to configure all the column headings for display.
     - Select **Select All** to add a selection box on the Holds screen to allow for the selection of individual or all listed requests.
3. Close the Show Columns window by clicking anywhere outside it.