Holds To Review Policy

Use this screen to create or edit hold to review policies which help to identify holds that have not been fulfilled within the time period specified.

To access this screen, sign in Service Configuration, open the WMS Circulation left navigation, select Holds and Schedules, and then select the Holds To Review Policy link.

Holds To Review policies help to identify holds that have not been fulfilled within the time period specified and help identify items that may need to be fulfilled via an alternative method, such as through purchasing or interlibrary loan.

Overview

For a hold to qualify for review, there must be a corresponding Holds To Review policy in place when the hold is created. Whenever a hold already linked to a policy is edited, the system will recalculate its review parameters based on the current rules in the policy.

By hold type, you can determine if a hold should be reviewed when it is:

- \( \times \) days, weeks, or months before it will expire at the Needed Before Date and/or
- \( \times \) days, weeks, or months after it was created

Leaving a period blank will not cause the hold to be placed in review based on that parameter.

The configured periods can be adjusted by hold type:

- Circulation Requests include item-level, title-level, or special requests that are not related to an interlibrary loan or other external system.
- External Borrowing Requests include holds created by an external system on your patron's behalf. You may only need to review these close to the expiry date.
- External Lending Requests include holds created by an external system that need to be supplied by your library.

Hold Request Policy Map

Holds To Review Policies can then be mapped by patron type and material format via the Hold Request Policy Map.

A single Review policy can be applied to multiple entries in the map. If holds do not require review, you do not need to select a Holds To Review Policy in the map.

Create or edit hold to review policies

1. On the Holds To Review Policies 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 listed below. All fields, except Policy Name, are optional.
Leaving a field blank will result in no holds being placed in review for that parameter.

1. **Policy Name:** Name of the policy. This field is required and must be unique.

3. **Circulation Request, External Borrowing Request, External Lending Request**
   1. **Needed Before Date:** Select the number of days, weeks or months before a hold's expiry date that the hold should move to In Review status.
   2. **Created Date:** Select the number of days, weeks or months after a hold was created that the hold should move to In Review status.

4. After creating a Holds To Review Policy, you will map the policy to patron type and material format using the Hold Request Policy Map.

**Related policies**

[Hold Request Policy Map](https://help.oclc.org/Library_Management/WorldShare_Circulation/Configuration/OCLC_Service_Configuration_-_-...)