Hold Fulfillment Policy

Use this screen to create or edit hold fulfillment policies which determine how long items are on the hold shelf.

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

Use this screen to determine how long items are on the hold shelf.

- The hold shelf is the location in your library where items on hold are stored until picked up by patrons.

Create or edit hold fulfillment 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:
   a. Policy Name: Name of the policy.
   b. Hold Shelf Period: Amount of time the item is available on the hold shelf.
      - The time begins when the item is checked in at the pickup location.
      - Patrons have the duration of the period to pick up their hold.
      - At the end of the period, if the item is not picked up, the system sends the Hold Shelf Expiration Notification Policy and the item is listed in the Clear hold shelf report for removal from the hold shelf.
      - Exclude closed hours: If disabled (default), the hold shelf period will continue to include time that your library is closed.
         ▪ When enabled, the hold shelf period will only include time that the pickup location is open. The calculated hold shelf period will not expire when your library is closed and patrons will have the configured amount of time to pickup their reserved items. Note: The open hours of the pickup branch are used if the branch’s open hours are set to override your institution hours.
      - Limit to hold expiry date: If enabled (default), the item’s hold shelf period will be limited to the unfulfilled hold’s expiry date.
   c. Bill for picking up hold: Select a fixed bill from the list. Create fixed bills on the Bill Structures screen.
   d. Hold Pickup Notification Policy: Select the hold pickup notification that will be sent to the patron when their hold is available. Create hold pickup notifications on the Notification Policies screen.
   e. Hold Shelf Expiration Notification Policy: Select the hold shelf expiration notification that will be sent to the patron when their hold expires from the Hold Shelf.
      - Create hold shelf expiry notifications on the Notification Policies screen.
      - This notification will be sent to patrons who failed to pick up their hold during the time set in the Hold Expiration Period.
      - If you do not select a hold shelf expiration notification, the notification sent to the patron will default to the Hold Request Expiration Notification Policy selected on the Hold Request Policy screen.
3. Click **Save**.

**Copy hold fulfillment 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 fulfillment 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 Fulfillment Policy depends upon:

- Bill Structures
- Notification Policies

Hold Fulfillment Policy is used in:

- Hold Fulfillment Policy Map