Hold approval and preparation

Learn how to manage item approval and preparation workflows for hold requests in WorldShare Circulation.

Configure approval and preparation

Optionally manage item approval and preparation workflows for hold requests in WorldShare Circulation. When enabled, materials will not appear ready for pickup to your patron or other members of library staff until the item is approved and/or prepared for use.

To automatically require approval or preparation during hold fulfillment, enable the new Item Approval and Item Preparation options in the Fulfillment section of your Hold Fulfillment Policies.

You can manually require approval or preparation on an ad-hoc bases for holds by using the Edit Existing Hold Request dialog box in WorldShare Circulation.

Note: For libraries that are members of a circulation group, Hold Fulfillment Policies are controlled by the item-owning institution. Library staff may see approval or preparation messages for non-local items that will be picked up at one of your library's branches even if your library has not enabled approval or preparation for items in your own collection.

The following roles are required to manage a hold's item preparation status:

- Circulation Admin
- Circulation Desk
- Circulation Desk Privacy
- Student Worker
- Student Worker Circulation

The following roles can manage a hold's item approval status:

- Circulation Admin
- Circulation Desk
- Circulation Desk Privacy

Refer to Circulation account roles for more information.

View and edit approval or preparation on existing hold requests

The system will determine if approval or preparation is required by library policy when the item is initially checked in at the pickup location to fulfill the hold. You can view and edit the approval or preparation requirement via the Edit Existing
Hold request dialog.

The hold’s approval and preparation statuses can be altered until the hold is picked up, in use, completed, deleted, or expired.

Access the Edit Existing Hold Request dialog from the Check In screen, the patron Holds queue, or the Pickup Location report:

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. From the Edit Existing Hold Request window, view and change the hold’s item approval and preparation status. Status options include:
   - **Not Required**: Approval or preparation are not required. The item may be checked out or used in house.
   - **Requires Preparation/Approval**: The held item should be prepared and/or approved by an authorized member of library staff. The hold will not display as Ready for use when in this state.
   - **Prepared/Approved**: Approval or preparation has been provided by an authorized member of library staff. The item may be checked out or used in house.
4. Click Save Changes.

### Approve or prepare the hold request

A hold will remain in and return to Getting ready status if either approval or preparation are required.

- The requesting patron will not receive a hold pickup notice or see that the item is ready via My Account or self-service kiosks until the approval and/or preparation workflows are completed.
- Until the hold is ready for pickup, My Account will indicate that the item is in transit to the pickup location.
- To ensure that patrons have the desired hold shelf period to retrieve the item, the system will not calculate the hold shelf period until the hold is in Ready for use status.

Use the Actions column to confirm approval or preparation of the hold request on either the Holds tab of the patron record or the Pickup Location Report. Use the Actions menu drop-down to select Approve or Prepare.

**From the Holds tab - Image:**

![Image of the holds tab with action buttons for approving and preparing holds.](https://help.oclc.org/Library_Management/WorldShare_Circulation/Holds_management/Hold_approval_and_prepa...)
If an item will require approval or preparation to fulfill a hold, a warning message appears in the following places:

**In the Status Details column when viewing the patron Holds queue - Image:**

**In WorldShare Circulation when an item is checked in at the pickup branch to fulfill that hold - Image:**
When attempting to check out the item to the requesting patron or move the hold to In use status - Image:

![Acknowledgements](https://help.oclc.org/Library_Management/WorldShare_Circulation/Holds_management/Hold_approval_and_prepa...)

Acknowledgements

Overrides
The hold request associated with this item requires approval.
The hold request associated with this item requires preparation.

Acknowledge  Cancel