

FAQ for Local Holds/Use

Updated: April 2023

Local Holds/Use [LHU] parameters: known issues we learned during the pilot project

- **Renewals may allowed on regular materials when LHU items have a status of Available.** If there is an Active hold on a BIB record and there is a LHU item with a status of Available, the system will allow the renewal of the item as it counts the LHU item status in the renewal algorithm.
- **LHU items returned to non-owning library can stay at check-in location to fill holds due to RTH functionality.** RTH functionality can supersede the LHU parameters and may retain the LHU item at the check-in local to fill a local hold there. Once the item is returned again, and there are no holds at the check-in location, the LHU item is sent back to the owning library.
- **Items with LHU parameters may not sort properly when checked in using a sorter.** A sorter library reported that LHU items went into their exceptions bin, instead of being sorted into the appropriate collection bin. This may have been due to outdated sort criteria.

Q. How should we handle On Order items?

A. Libraries who add item records at the point of order via GetIt or by entering a BSE/Item record **should not assign the BKALH14 Item Type until the item has been received in hand by the library.** This is for a couple of reasons:

- The BKAHL14 item type prevents patrons from non-owning libraries from placing holds (depending on the presence of other items on the bib record). Patrons should be able to place holds on these titles while the items are on order. This causes less confusion for patrons, and allows selectors to gauge demand.
- Items should only have the BKAHL14 item type for up to 60 days. It isn't uncommon for materials to be ordered 60 days (or more) in advance of their availability.

When On Order items are received in hand by the library, then the library can process the items as Local Hold items by assigning the BKALH14 Item Type and the Custom Item Status of Local Hold. **When the item is checked in, it will only fill Local Holds for that library, even if there are holds for other libraries on the bibliographic record.**

Q. What does the work flow look like to set and remove the local hold only item status? Is this automated or do libraries have to change each individual item at the end of 60 days?

A. See the updated document "[Workflow for Local Holds/Use item records](#)". Libraries will need to manually change the items at the end of the 60 day period.

Q. Is 60 days a long enough time period to have any meaningful impact for local patrons?

A. The Workgroup recommended 60 days for the pilot project. During the pilot, the workgroup solicited input from participating libraries. Participating libraries felt that the 60 day maximum was enough to satisfy local holds/use and they were free to remove the LHU parameters earlier than 60 days if they noticed those items were no longer in demand at their library.

Q. Would adopting local holds only be up to each library or a SCLS-wide change?

A. Using the LHU parameters is a per library decision. As of April 2023, libraries can only apply LHU parameters to regular print Adult books (Book Adult Fiction and Non-Fiction).

Q. How does SCLS or individual libraries tracking or measuring the results of the pilot? How would success (or not) be measured?

A. Tim Drexler, our resident Data Wizard. Has been compiling data points throughout the pilot project and has provided us with the remarkable [Local Holds Pilot Project Data](#) using Tableau dashboard. We plan to continue tracking the data during the coming months to help us continue to assess this service option and watch for any potential problems.

Q. We would find it helpful to have promotional/informational materials to share with patrons about the pilot to explain why new items are available for local holds only. (Already shared with my cluster rep). It may be helpful to have talking points for staff for shared understanding and consistency.

A. We have posted these promotional/information documents on the ILS Support/Circulation webpage under the Local Holds/Use header

- [Talking Points for staff](#)
- [Local Holds "info" sheets/bookmarks](#)

Q. Don't Miss Lists: These lists now include bibliographic records for titles, which may only have items available for local holds. We've already had a patron encounter this in LINKcat and they were confused why they couldn't place a hold on the title. With more libraries participating, this is likely to happen more often. If all libraries owning a popular & new title are participating in the pilot, patrons will not be able to place holds on these titles using LINKcat until an item with no hold restrictions is added to the bibliographic record. There should be communication with staff on whether they can place holds for patrons in this circumstance (we were told this is ok) and information for patrons as this may mean they can't place a hold on a new title themselves until the 60 day window is over.

A. Yes, this scenario can happen if a bibliographic record(s) is added to the Don't Miss Lists, and the only item(s) on that record have the Local Holds Item Type. In that case, only patrons from that item's owning library could place holds.

- In order to resolve this problem, library staff that add the first item, with LHU parameters, to a BIB record, will also add a Dummy items record using a regular

item type and an On Order status. This will allow any patron in the system to place a hold on the BIB record.

Q. How do we track when items can be removed from local hold status?

A. The pilot project period is a maximum of 60 days after adding items to the system. If you notice that your Local Holds/Use item is not circulating within your library prior to the 60 days maximum, you can change the item parameters earlier than 60 days. The steps for removing the Local Holds/Use parameters is located in the updated document [“Workflow for Local Holds/Use item records”](#).

Q. At SUN, I think we were picturing having our items for the Local Use pilot interfiled with the regular new books. So the renewals restriction has me scrambling a bit -- do we need to put these items on a special display, and if so what kind of label or sticker will each library be using? I don't think there should be a renewal restriction -- if a patron has the item and there aren't additional holds, I think that patron should be allowed to renew it. Otherwise, I feel like that patron is being penalized for picking up this item as opposed to a regular copy. And if only one local patron gets the item in the 60-day window and then renews it twice, I think that's okay too. I do understand that Lucky Day items aren't renewable--and that's why we have them shelved separately. I do recognize that the workgroup has agreed on the renewals limitation, so I just need some recommendations on how libraries should set up their Local Use collections for the pilot, and I'd like the renewals limitation to be revisited if Local Use becomes permanent.

A. The renewal limitation is the same as New items on a GENERIC record and many patrons are accustomed to not being able to renew new materials.

A. Some libraries will place these items with their other Lucky Day items. Some will interfile them with regular materials and place a different colored label on the item indicating NEW or Local Hold. Some will shelve with their Walk-in collection and some on their New items shelf. Since this pilot is focused on NEW Book, Adult, Fiction items, each library should decide how best to display these items for the benefit of walk-in patrons and also for library staff, who may find these items on the Holds Queue report to fill a local hold.