

Maine Balsam Library Consortium

Interlibrary Loan (ILL) Directions

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Holds & Balsam ILL

There are two different types of holds in Koha, internal holds and external holds.

1. Internal Holds - Your library patrons placing holds on items owned by Your library

Your patrons can place holds on items in Your library. Holds can be placed in multiple ways: by staff in the staff interface or by patrons using their patron account in the OPAC.

a. Holds on items that are checked out

- i. Patrons can place a hold on an item that is checked out using their patron account in the OPAC ([see 1.1](#)). When the item is checked in it will trigger the hold alert. Confirm the hold, print the slip, place slip into the book, and alert the patron the item is ready for pickup, and place with the ILL pickup ([see 3 step 5](#))
- ii. Staff can place a hold on an item that is checked out on behalf of a patron using the Koha staff interface ([see 1.2](#)).

b. Holds on items that are available

Patrons can place a hold on an item that is available (not checked out) using their patron account in the OPAC ([see 1.1](#)). Library staff will see this in the Holds queue in Koha, pull the item from the collection, check it in to trigger the hold alert, confirm the hold, print the slip, place slip into the book, then alert the patron the item is ready for pickup, and place with the ILL pickup ([see 3 step 5](#))

2. External Holds or Balsam ILL (Interlibrary Loan)

Your patrons can place holds on items that belong to the Balsam ILL libraries. Patrons at participating Balsam ILL libraries can place holds on items at any of the Balsam ILL libraries. Holds can be placed in multiple ways: by staff in the staff interface or by patrons using their patron account in the OPAC.

1 Internal holds - Your library patrons placing holds on items owned by Your library

1.1 How patrons can place holds using the OPAC

Patrons can place holds on both Your library & Balsam ILL Libraries items via the OPAC, but they must be logged into their patron account.

Step 1: Click 'Log in to your account' and log in



Step 2: Type in search terms into the search box

Step 3: Once you locate desired item, Click 'Place Hold'

Step 4: The pick up location should autopopulate to your home library, then click 'Confirm hold'

Placing a hold

Confirm holds for: H [redacted] ([redacted])

☒ Place a hold on

Braiding sweetgrass for young adults : indigenous wisdom, scientific knowledge, and the teachings of plants /

, by Kimmerer, Robin Wall,

Pick up location: Thorndike Library College of the Atlantic ▼

[Show more options](#)

Confirm hold

The library that owns the item will pull it from their shelves and send it to us via the ILL van delivery. The ILL staff will handle it from there (see [3](#) for our process)

1.2 How staff can place a hold on checked out item using the staff interface

Step 1: Go to staff-balsam.bywatersolutions.com/ and log in

Step 2: Enter search terms and click on 'Search catalog'

Search catalog

Step 3: Confirm the item is checked out by looking at the status

Status

Checked out to
thornill interlibrary
loan
(25015000004290):
due 04/30/2026

Step 4: Click on **Place hold** button that's the top right of the record

+ New ▼

Hardcore fangirl : the early comics 2020-22 / Kaitlin Chan.

By: Chan, Kaitlin [author.]

Step 5: Search for the patron and click on their account that pops up in green

Holds

Place hold on **Hardcore fangirl : the earlyt comics 2020-22 / by Chan, Kaitlin,**

Search patrons

Patrons

Enter patron card number or partial name:

Stevens, Hannah (25015000007103) Ellsworth, ME 04605 **Thorndike Library College of the Atlantic**

Step 6: **Hold next available item** is automatically selected, click **Place hold**.



Hold next available item

Pickup at:

Thorndike Library College of the Atlantic ▼

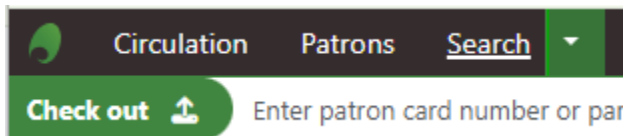
Holds to place
(count)

2 External holds or Balsam ILL (Interlibrary Loan)

2.1 How to place a hold on an item in another Balsam library using the staff interface

Step 1: Go to staff-balsam.bywatersolutions.com/ and log in

Step 2: Click on Search



Step 3: Enter your search terms and click Search

Advanced search

[Search](#)
[Fewer options](#)
[Clear fields](#)
[Go to item search](#)
[Search history](#)

Search for

Keyword Scan indexes: ☐

and ▼ Keyword

and ▼ Keyword [+]

☒ Apply field weights to search

Step 4: From your results list, find a title you want and click on it to go to the record

Step 5: Click on **Place hold** button that's the top right of the record

[+ New](#)
[Edit](#)
[Save](#)
[Add to cart](#)
[Add to list](#)
[Print](#)
[Place hold](#)

The Mitford murders / Jessica Fellowes.

By: Fellowes, Jessica [author.]

Publisher: New York : Minotaur Books, 2018

Copyright date: ©L2017

Step 6: Search for the patron and click on their account that pops up in green

Holds

Place hold on **The Mitford murders / by Fellowes, Jessica,**

Search patrons

Patrons

Enter patron card number or partial name:

[Search](#)

[Stevens, Hannah \(25015000007103\) Ellsworth, ME 04605](#)
Thorndike Library College of the Atlantic

Step 7: **Hold next available item** is automatically selected, click **Place hold**.

Holds

Place hold on **The Mitford murders** / by Fellowes, Jessica,

Hold details

Patron: Hannah Stevens (25015000007103)

Estimated priority: 1

Notes:

Hold expires on date:  

Non priority hold: ☐ A non priority hold doesn't prevent a current checkout from renewing



Hold next available item

Pickup at: Thorndike Library College of the Atlantic 

Holds to place (count)

Place hold

Step 8: Now you'll see confirmation that the hold was placed.

Holds

Place hold on **The Mitford murders** / by Fellowes, Jessica,

Search patrons

Patrons

Enter patron card number or partial name:

Search

Browse by last name: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Always show holds ☒

Existing holds

Update hold(s)

Cancel selected (0)

Showing 1 to 1 of 1 entries

Search: 

 Columns  Export  Copy shareable link

☐	Priority	Change priority	Patron	Notes	Date	Expiration	Pickup library	Details	Delete	Suspend	Print hold/transfer slip
☐	Change priority to: 1 Current priority: 1	  	Hannah Stevens (25015000007103)		04/07/2026	 	Thorndike Library College of the Atlantic	Next available		 Suspend until  	

Showing 1 to 1 of 1 entries

The library that owns the item will pull it from their shelves and send it to us via the ILL van delivery. The ILL staff will handle it from there and alert the patron when the item arrives.

3 How to check for and process holds

Step 1: Go to staff-balsam.bywatersolutions.com/ and log in

Step 2: Click on **Circulation**

Step 3: Click **Holds Queue**

Step 4: Both internal and external holds will appear here together. Go to the **Send to** column (highlighted in red) and click the small arrow to sort by library. Look for Your library (highlighted in yellow within the red). Write down the call numbers in the Call number column (highlighted in yellow) and go retrieve them from the shelves.

Item type	Call number	Copy number	Enumeration	Barcode	Patron	Patron category	Send to	Date	Notes
Book	QB 500 K65 1996			35105000320016 or any available	Linda (25555000) 207 @yahoo.com	Adult Resident (ADULT)	Hartland Public Library	04/10/2026	
Book	PN 2053 .B313 1984			35105000924874 or any available	Thorndike Patron Name (25105000)	Faculty/Teacher (FACULTY)	Thorndike Library College of the Atlantic	04/10/2026	
Book	PN 2053 .B59 2001			35105001144795 or any available	Thorndike Patron Name (25105000)	Faculty/Teacher (FACULTY)	Thorndike Library College of the Atlantic	04/10/2026	

Step 5: Check in the items and a **Hold found** alert will appear. Click **Print slip and confirm (P)**. A separate print window will open, press Print.

Hold found

A director prepares :
(35105001144795)

Hold for:

- Patron name & Barcode - Faculty/Teacher
- 105 Eden St
- Bar Harbor, ME 04609
- Patron notification: Email.

Hold at Thorndike Library College of the Atlantic

Check in message

35105001144795: A director prepares :

Not checked out.

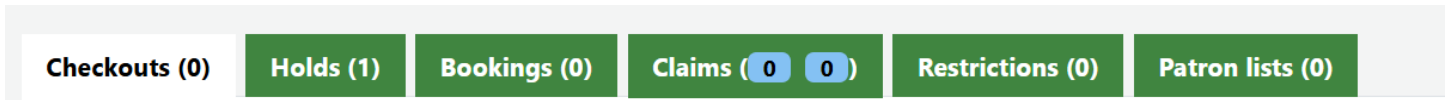
Step 6: Notify patrons that their books are ready, either via phone or email (Koha should send

Step 7: Put the slip into the item and put with the ILL pickups.

4 How to cancel a hold

Step 1: Go the patron's account

Step 2: Click on 'Holds (#)'



Locate the hold to be deleted and click the red trashcan icon to the far right

Checkouts (0)

Holds (1)

Bookings (0)

Claims (00)

Restrictions (0)

Patron lists (0)

✕ Clear filter

⚙️ Columns

📄 Export

🔗 Copy shareable link

☐	Hold date	Title	Call number	Item type	Barcode	Pickup at	Expiration	Priority	Delete?
☐	04/22/2026	Hardcore fangirl : the early				Thorndike Library College of the Atlantic (current)		1	

Select a reason and confirm cancellation

Confirm deletion

Are you sure you want to cancel this hold?

Cancellation reason: No reason given

Confirm cancellation
Cancel

Please send an email to the library that placed a hold on the item so that they know it has been canceled

5 What to do when a patron brings an item to check out and you get an alert that another patron has a hold on that item

If a patron places a hold on an item in Your library that hasn't been pulled yet, but someone else happens to have it and tries to check it out, you will see a warning message like this:

Please confirm checkout

- Item *Moonstone* : (35105001067970) has been waiting for Catherine Preston-Schreck (25015000010578) at Thorndike Library College of the Atlantic since 03/30/2026

Cancel hold ☐

Revert waiting status ☒

Remember for the session for this patron ☐

The patron standing in front of you is priority, so click **Yes, check out**.

When the item is returned, that will trigger hold and the **Hold found** alert will appear (see step 5 in section [3](#))

6 Age based holds protections

When new books come to your library, you often don't want them to immediately go out the door to other libraries! We have built in a way to protect those books for a set amount of time called "Age Based Hold Protection. By changing the item type to "New 30" or "New 60" you can keep the books at your library for one or two months from the time it was added:

y - Koha item type ✕ ▼ **Required**

After the time elapses, the item type will change to "New" and will circulate to other libraries. You can then periodically run a report for things with item type "New" and move them to their appropriate shelving locations.