ILL

Policies &

Accepting

Requests

**Familiarize yourself with our ILL policies. Go to our website and click on “Interlibrary Loan” under the “Books & More” tab. Then click on the Interlibrary Loan Policies Link.**

**When accepting a request, make sure the patron is eligible for ILL and the requested item is eligible.**

**Patron Eligibility:**

Make sure a patron’s late fines are under $10. Don’t even take the request if over $10.

Patrons with temporary library cards cannot use ILL. Out of system payers can, as long as they have two months of time left before their card expires. Children and teens can use ILL. Mycard kids can’t.

We reserve our ILL service for patrons that cannot get ILLs through a college or school ILL service. If a patron has ties to a school that offers ILL services (all local colleges do) tell them to go through their college library’s ILL service. It will be much much faster, especially for the articles.

**Material Eligibility:**

We can obtain books, articles, and microfilm reels. We can’t get DVDs, CDs, audio/visual items.

Items have to be more than 6 months old before we’ll request them. I use Amazon to determine when a book was released.

If any UHLS library owns a copy of the title the patron wants, even if it’s a reference copy, we won’t get it for them. If copies are missing or lost in horizon, we will attempt to get it through ILL.

We cannot get textbooks. Very few libraries loan them. Many college libraries have textbooks on reserve. You can refer students to their college libraries.

**Other Factors to tell the patron:**

Tell the patron it will most likely take at least 2 weeks for the item to arrive.

ILLs can be borrowed for 21 days (not 28).

ILL items cannot be renewed.

A patron must wait three months after returning an ILL book before requesting it again.

We’ll contact the patron just once, by phone or email, and they will have 7 days to check out their item.

ILLs must be returned to the branch they borrow it from.

If we are unsuccessful at obtaining a book, the patron must wait at least 3 months before requesting it again. We don’t hold the request and submit it for them later. Ask the patron to contact us in three months if they still want it.

A patron must wait three months after returning an ILL book before requesting it again.

Notes:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Rank the owning libraries.

Once you’ve found the title you want to request, you rank the libraries in the order you want them to receive the request. To start ranking libraries, click on HOLDINGS, then filter by “Custom Holdings Path.” Type in BOOKS and click Go. This will bring up a bunch of pre-selected libraries that APL has identified as free loaners. The locations are mostly ranked by proximity to Albany too.

Submit the Request and indicate your mailing address.

Notes:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

After ranking the libraries and clicking on “create request,” You must do two things on the next page. Be sure to select your branch (ie. the patron’s pick up location) under “apply constant data.” This will give the lending library your mailing address.

The second thing you must do on this page is scroll down near the bottom where it says “Patron.” In name, type in your 4 letter branch code followed by your first name (e.g. APLM—Nolan). Entering this info will help APL staff identify who requested the title if the book accidentally gets mailed to another branch.

If these fields are populated, click on “Send request.” A few seconds later click on the 9 digit request ID number that flashes on the screen. You’ll want to write down this number on your paperwork—see below.

Notes:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mark a statistic in Shares for a “requests made for” your location.

Every time you request an item for a patron, you’ll want to track this statistic in the ILL Statistics Google sheet.

You can find an active link to the ILL Google Sheet in the shares drive.

In the shares drive, go to

Branches -> ILL Branch Statistics – 2019.

MAKE SURE YOU ARE ON THE TAB FOR THE CORRECT MONTH

Increase the number of “requests made” for your branch by 1, then save the Google sheet.

When the book arrives, hold onto the packaging and any paperwork that came with it. Next, notify the loaning library that the book arrived.

To do this, take out the paper request for the title and note the Request ID # you wrote down.

Click on “Interlibrary Loan Home,” and then do a search for your Request ID#. You can also find the title listed under “In Transit.”

After clicking on the title, you’ll see the question “Did you receive this item? “ Click on “Mark as received.”

Notes:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The waiting game: will your request get filled?

Your request gets filled and the book arrives at your branch!

You notice in OCLC Worldshare that there is an “Unfilled” request under borrowing requests.

When you notice an unfilled request, that means a request could not be obtained. Click on “unfilled,” and if it is one of your requests, act on it immediately. It will disappear from unfilled after a few days. Before you “Cancel Request” you should look at the “request history” at the bottom of the page to see which libraries you ranked, and why they couldn’t lend. The library codes will help you if you re-request the book, since you’ll likely want to avoid requesting from these same libraries.

Once you note which libraries couldn’t fill the request, click on “Cancel Request” at the top of the page.

Now, you may either contact the patron, tell them the title could not be obtained and tell them that they can re-request in 3 months, or, you can start over and place a new request for the title selecting different libraries.

Now that the request has been canceled, you don’t have to do anything additional. Hold onto the paperwork so you know when 3 months has passed.

REQ 5/20/2014

REQ ID # 52462156

Paper Record Keeping

On the paper request sheet, you should keep track of some details you’ll refer to later.

Now that you’ve placed the request, you should write “Request Date” followed by the date you requested the item on. You should also write down the request ID number that popped up immediately after placing the request.

REQ 6/20/2014

REQ ID # 52462156

Request Stat

Paper Record Keeping

On your original paper request sheet, add the words “Request Stat” and make a check mark after you’ve saved and closed the excel file.

Notes:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mark one statistics in Shares for “request filled.”

Every time an ILL book arrives from a lending library you want to keep track of “requests filled” in the ILL Branch Statistics excel sheet.

In the shares drive, go to Branches -> ILL Branch Statistics

MAKE SURE YOU ARE ON THE TAB FOR THE CORRECT MONTH.

Increase the number of “requests filled” for your branch by 1.

Save the excel file and then IMMEDIATELY CLOSE THE FILE, or else others won’t be able to go in and make changes.

Paper Record Keeping

On your original paper request sheet, add the words “Receive Stats” and make a check mark after you’ve saved and closed the excel file.

Paper Record Keeping

On your original paper request sheet, add the word“Received” followed by the date you marked it received in Worldshare.

REQ 5/20/14

REQ ID # 52462156

Reqest Stat

Received 5/ 31/14

REQ 6/20/14

REQ ID # 52462156

Request Stat

Received 6/ 31/14

Receive Stats

Paper Record Keeping

On your original paper request sheet, add the words “Returned” and write the date you marked it returned in Worldshare.

Notes:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

When it’s time to mail a book back, you’ll have to notify the loaning library.

Take out your paper request for the title and note the Request ID # you wrote down.

Log onto Worldshare, click on “Interlibrary Loan Home,” and then do a search for your Request ID#. You can also find the title listed under “Received/In Use.”

After you find the title, you’ll see the question “Ready to return this item? “ Click on “Return Item.” Next step, paperwork.

Was the book sent from a CDLC library? If so, go to the “How to return books to CDLC libraries page.” (Page 17) If it didn’t come from a CDLC library, you can pack up the item and any accompanying paperwork in the package it arrived in. Put the entire package in a zippered UHLS pouch and send it through the bins to APLM Attn: Rebecca Delgaizo (3rd floor) with a note asking him to apply postage and mail it. You pack the book and apply the mailing label, Rebecca simply applies postage and sees that it gets mailed.

Hold onto your original request paperwork with the notes you’ve written in for at least 6 months.

REQ 6/20/14

REQ ID # 52462156

Reqest Stat

Received 6/ 31/14

Stats

CKO to shelf?

Contacted? 7/1/14

Paper Record Keeping

I add two more marks to my checklist of steps. I write “CKO to shelf?” and make a checkmark when I checkout the title to my location’s holding shelf account. I also write the work “contacted?” and write the date that I contacted the patron. I’ll often write how I contact them. Voicemail? Spoke to spouse. Spoke directly, etc.

Notes:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Prepare the item for circulation.

Preparation varies from location to location. I’ll show you what we do at Washington Ave. You or your circulation staff can do this.

Pull out your pre-made ILL lending barcode cards. In Sierra, search for one of your barcodes, then “edit” the record.

Change the “Call No.” field from “Available “ to “ILL—” followed by the title of the book.

Save the record and bring up your location’s hold shelf account. Check out the book to the hold shelf.

At Washington Ave., I then fill out a slip with the patrons name (last, first) along with the date the book can be pulled from the hold shelf (a week from when I contact the patron) plus the due date of the book - 21 days from the date we contact the patron, not 21 days from the date the book is checked out.

At Washington Ave., I then paperclip the checkout barcode card to the front of the book along with a note informing staff to manually change the due date. I slip in the hold note with the patron’s name and file it on the hold shelf under the patron’s last name for at least a week.

I only contact the patron once by email or phone. I inform them they have until XXXX to pick up the item, which location has it, which desk to visit, the fact that the due date is set and that it’s not 3 weeks from when they check out, and the fact that ILL books are not renewable.

If you can’t reach the patron , edit the patron’s Sierra account and add both a “Message” by right clicking and adding a field. “ILL waiting for patron at \_\_\_\_\_ Branch. Title is \_\_\_\_\_\_. NDD 12/18/2018” Remember to take it off when the item is picked up.

Make sure your circulation staff know how to manually change the due date to the pre-determined due date you establish. Many circ staff don’t know how to do this and incorrectly check it out for the regular 28 day period.

Notes:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Returned ILLs

Sierra and Barcode Steps for Returned book.

REQ 5/20/14

REQ ID # 52462156

Request Stat

Received 5/31/14

Receive Stats

CKO to shelf?

Contacted? 6/1/14

Returned 6/16/14

Notes:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The “all holdings” number tells you how many OCLC libraries own this title. If the number is high, then you’re all set to start ranking the libraries.

If it’s low, go back to search results, check to see if there’s a different ISBN, etc. Some titles are only owned by a handful of libraries, but usually there are dozens or hundreds of owning libraries. Verify ISBNs with Amazon if needed.

Then do an “Advanced Search” search for the title, or ISBN. If that doesn’t return the correct titles, try an advanced search for a keyword and author.

When you find the title you want, click on the title in blue. Make sure NOT to select an ebook or accidentally select a large print edition. Ebooks are not requestable.

When you’d like to place a request, log in to OCLC Worldshare. link should be saved to your web browser.

username \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

On the left hand side, click on discover items

Submitting Requests

Discover libraries that

own the book you want.

World Share

You’ll only have to go into these 3 areas of WorldShare.

Produced: Newly created requests you’ve made.

Awaiting Response: Requests you’ve made that are being considered by your ranked libraries.

In Transit: Requests that have been filled, have been mailed, and are on their way to you.

Unfilled: Requests where none of the ranked libraries were able to fill it. Check daily and act on these promptly! You have to cancel the request.

Received: The loaning library wants to know if you received this book. You most likely forgot to click yes to “item received.”

Conditional: Owning Library will offer the book based on conditions you can agree to.

Received/In Use: Titles you’ve received and are either on the hold shelf or in the patron’s possession.

Overdue: These titles are overdue.

Recalled: The loaning library wants this book back ASAP.

Returned: After you mark a book returned, it goes to this category until the owning library marks it received.

Article Requests

First see if we have access to the article through our own databases.

If the patron is a student, and this is an article for one of their classes ask the student to use their college’s ILL service. It will be much faster, we can’t support Albany’s college student requests, and it’s a service they pay for with their college tuition.

To request an article, go to Discover Items and search for the Journal Title (not the article title). You can do an “advanced search” and limit it to “Journal / Magazine”, or “Journal / Magazine—eJournal / eMagazine” if it’s a more contemporary article.

Sometimes contemporary articles can only be found in the eperiodical since libraries stop carrying the print journal. It’s okay (and you’re encouraged) to request ejournal articles. The holdings column will tell you which volumes of the journal each library owns. Make sure they own your required volume before ranking the library.

Article Requests

After ranking the owning libraries, click on “create request” as usual. Apply your location’s “constant data.” You’ll have to add some information to the next screen. You’ll want to add information to the Article Title, Article Author, Volume and Page fields.

Then scroll down the page and in the “Electronic Delivery” section choose “Article Exchange” from the drop down menu for “preferred.” Leave the blank box to the right blank. Do not add the patron’s email address. Then send your request as usual.

Notes:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Ms. Smith,

The interlibrary loan book you requested, \_\_\_\_\_\_\_\_\_\_\_, has arrived for you and is available for check out at the circulation desk at the \_\_\_\_\_\_\_\_\_ Branch of Albany Public Library.

The book will be available (filed under your last name) at the circulation desk until \_\_\_\_\_\_\_\_\_\_\_.The book will be due back on \_\_\_\_\_\_\_\_\_\_\_\_. Unfortunately, interlibrary loan items can not be renewed.

Thank You,

Meghan

ILL Staff

Article Requests

Articles arrive in different ways. You may be emailed a link to access the article. The email address the article is sent to will match the email that is listed in the “Electronic Delivery” section when you apply your constant data. More likely, you’ll receive the article through Article Exchange (AE). You’ll know your article has arrived when you see an “AE Alert” on the left hand column.

Click on the AE Alert and on the right hand side of the page you’ll see a link to the article with a password to type in. Click on the link, enter in the password, and you should get your pdf. You can then save the pdf to your computer and email it to the patron. I do not recommend using the “Email doc to patron” option.

After you’ve received your article be sure to “Mark as Received” and mark your statistic indicating request filled. You are done at this point, you don’t have to “return” articles.

Sample Email to Patron

Keep in mind that these LVIS libraries may charge us. To determine if a library will charge us, click on the blue i next to the library’s name, then click on “More…” next to their Fees->Loans information. Determine if we are eligible to receive the item for free before ranking the library.

If you decide you want to request from this library, click on Yes under “supplier” and their code will be added to your Lender String above. The lender listed first in the string will be notified of the request first. Some lenders request you list their code twice so they have 8 days to fill the request.

You should rank five a total of 5 libraries, then click on “create request.”

If you’ve exhausted the BOOKS libraries and need more libraries to consider, you can filter by “Profile Group.” Type in LVIS. This will bring up a bunch of pre-selected “Libraries Very Interested In Sharing.”

Notes:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Rank the owning libraries.

A NOTE ABOUT THE BOOKS CUSTOM HOLDINGS PATH: The Washington Ave interlibrary loan librarian will periodically check all of the libraries listed in the BOOKS Custom Holdings Path to ensure that they do indeed loan to us for free. You don’t have to check their loaning policies and costs before ranking them.

If you still need more libraries to rank, clear the box that says “BOOKS” or “LVIS” and click “Go” for list of all libraries available. Don’t select ALBRS or Library of Congress!! To determine if a library will charge us, click on the blue i next to the library’s name, then click on “More…” next to their Fees->Loans information. Determine if we are eligible to receive the item for free before ranking the library.

If you find that the only way to receive the item is by paying money, you’ll want to inform the patron before placing the request. First find out the prices from five libraries that will send to us. Then contact the patron and ask them if they are willing to pay between $X and $Y for the item. If they are willing to, go back in and rank the 5 libraries from cheapest to most expensive. Once you’ve determined that the library is willing to pay, go to “ILL Requests for Patrons Willing to Pay.” (Page 16)

How to Return Books To CDLC Libraries

ILL Requests for Patrons Willing To Pay

Date Requested:

Request ID:

“Requests Made” Stat marked

in “ILL Branch Statistics?”

Date you “marked received”

the item in OCLC Worldshare:

“Requests Filled” Stat marked

in “ILL Branch Statistics?”

Is the barcode checked out

to your hold shelf?

When and how did you contact

your patron?

Date your “marked returned”

the item in OCLC Worldshare:

**Rank The Charging Libraries**

If a patron has agreed with you to pay for an article or book (see bottom of page 5), you’ll search for the title and rank your libraries from the least expensive to the highest value the patron is willing to pay. To determine how much a library will charge, explore the library’s loan fees by clicking on the blue “i” to the left of each library name. Before you press on “send request” you must scroll far down on the page and go to the “Billing” section of the screen and click the box for “Use ILL Fee Management (IFM)” for payment. Type in the maximum price the patron is willing to pay. You can then “create request.”

On the next page, after you select your location from the upper right hand corner drop down menu, in the billing address field, you’ll have to delete the message that says “Please notify if there is a charge to borrow this material before filling the request. Thanks.” Also delete the fee terminology in Borrowing Notes field. If you don’t you’ll receive a “conditional” response from the loaning library asking if you agree to pay. Finally, to remind yourself later that this is a pay request, in the Patron name field at the bottom, type something like “APLB—Jen ( PAY!).”

**What To Do When a Library Fills the Request**

Keep in mind that we only charge a patron if a library fills the request. If a library fills the request, you’ll be able to find out how much they charged us by looking at the “Lending Charges” field under the “Lending Information” section of the request’s page. Sometimes it is less than anticipated.

This is the fine amount you’ll have to add to the patron’s card right before you contact them. Add the fee to the patron’s Sierra account and inform the patron that the item has arrived and they’ll have to pay the fee before receiving the book. This is not a fee that can linger on a patron’s card. Even if it is less than $10, it has to be paid in full at checkout in order for us to pay the invoice.

You’ll have to inform the circulation staff that when the patron picks up their article or book, they have to pay the agreed upon amount of money by cash, check, debit/credit in POS before they receive the ILL. Some patrons may try to browse their ILL books quickly and say they don’t need them after all, but they still need to pay for the cost of the loaning library sending the books. The fee is for the loaning library, not us.

**Let Nolan Know About Your Pay Requests**

When a pay a request is filled, you’ll have to email Nolan twice. Email him first when you see that the pay request has been filled by a library. Tell him the ILL Request ID Number, and the amount the library charged. Email Nolan again when your patron has paid the fee. Nolan will share this information with Mary Coon, who takes care of the invoices.

The loaning library will get paid directly by APL. Once you get the patron’s payment you don’t have to worry about the lending library receiving payment. The business office will take care of that.

**Pay Articles**

If a library that charges provides you with a digital copy of an article, DO NOT email the article to patrons before receiving payment from them. In order to ensure you’ll get the money, print out the article and ask the patron to come in to exchange their payment for the article. Once the patron pays though, feel free to email them the pdf of the article for them to keep.

Basic Steps to ILL

95% of ILL requests follow the following steps.

Take the request from the patron. (Page 2)

Submit the request using OCLC WorldShare. Requests for Books: Pages 3-6 Article Requests: Pages 13-15 Requests for a price: Page 16

Mark a statistic that you placed a request for your location. (Page 7)

When the item arrives, notify the lending library of its arrival. (Page 8)

Mark a statistic that you received an ILL. (Page 9)

Prepare the item for circulation. (Page 10)

Contact the patron to tell them the item is here. (Page 10)

Check the item out to the patron and manually change the due date. (Page 10)

When your patron returns the item to you, notify the lending library that you’re returning it. (Page 11)

Prepare the barcode you used for the item for the next ILL you receive. (Page 11)

Pack up the item in the packaging it arrived in and send it to Washington Ave for postage application and mailing. (Page 12) Or send it through the bins to the CDLC library that loaned it (Page 16)

ILL Procedures for Branches

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Updated 12/16/2018

Date Requested:

Request ID:

“Requests Made” Stat marked

in “ILL Branch Statistics?”

Date you “marked received”

the item in OCLC Worldshare:

“Requests Filled” Stat marked

in “ILL Branch Statistics?”

Is the barcode checked out

to your hold shelf?

When and how did you contact

your patron?

Date your “marked returned”

the item in OCLC Worldshare:

Date Requested:

Request ID:

“Requests Made” Stat marked

in “ILL Branch Statistics?”

Date you “marked received”

the item in OCLC Worldshare:

“Requests Filled” Stat marked

in “ILL Branch Statistics?”

Is the barcode checked out

to your hold shelf?

When and how did you contact

your patron?

Date your “marked returned”

the item in OCLC Worldshare:

Date Requested:

Request ID:

“Requests Made” Stat marked

in “ILL Branch Statistics?”

Date you “marked received”

the item in OCLC Worldshare:

“Requests Filled” Stat marked

in “ILL Branch Statistics?”

Is the barcode checked out

to your hold shelf?

When and how did you contact

your patron?

Date your “marked returned”

the item in OCLC Worldshare:

When a book you didn’t request arrives at your library.

Under “Borrowing Requests” go to In Transit to find the title of the book you accidentally received. The title will only show up here if it was requested by an APL location.

Under patron, you should see the 4 letter APL code entered by the requesting location. That’s who requested it. If it’s blank, you can click on the title and potentially find the email address and mailing location that should have got it.

If you don’t find the title in “in transit”, you should contact the library that sent the book and ask them if they accidentally sent it to APL.

Matching an OCLC library code with the actual library, or finding mailing addresses and contact info for lending libraries.

Say you want to find out the contact information for a library that loaned you a book. If you have the three letter OCLC code (ours is XFN) you can find this information.

Go to “Interlibrary Loan Home.”

Then click on “OCLC Policies Directory” in blue.

Then Search by “institutional symbol,” and type in the three letter code. You can also search by institution name.

Once you’ve searched and found the library that matches your code, click on the grey “contacts” tab to get mailing address information, and staff contact info.

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Updated 12/16/18

All Holdings (may charge)

Profiled Group—LVIS (may charge)

Custom Holdings Path –BOOKS (free) including CDLC

4

The ILL staff at Washington Ave. check the BOOKS list to ensure the libraries listed here won’t charge us. This task will be performed by Washington Ave. ILL staff. Please don’t alter the list.

If you decide you want to request from this library, click on Yes under “supplier” and their code will be added to your Lender String above. The lender listed first in the string will be notified of the request first. Some lenders request you list their code twice so they have 8 days to fill the request.

If you have 5, click on “create request.” If you need more libraries, go to the next page.

If the Lender String field isn’t clear, clear it out so you can start ranking the libraries.

Rank the owning libraries.

**Remove Sierra Messages**

In Sierra, bring up the patron’s account to see if there are any pop ups (Message) or ILL messages to borrower (Message To Borrower). them if they apply to this ILL title.

**Make sure the ILL is checked In**

In Sierra, determine if the ILL is still checked out to the patron. title of all ILLs is APLM ILL (NO RENEWALS). call number will tell you the title of the ILL. the item in if needed, and waive any fines due to our not promptly checking in the item.

**Fines**

In Sierra, determine if the patron accumulated a fine from returning the book late. If they did, jot down the following information: when the ILL was checked out, when it was due, when it was returned, and determine how many days the item was late, and the amount of the fine.

After you have this information, actually waive the fine. (this frees up the barcode for reuse.)

Now add a fine for the amount you waived. For the fine “reason” include the title of the ILL, the checkout date, the date is was due, when it was returned, and how many days late it was. example, “Late ILL - Gone with the Wind; CKO 2/14/15, DUE 3/5/15, RET 3/10/15, 5 DAYS LATE.".

**Changing the Barcode for its next use**

In Sierra, search for the ILL barcode. This should be paperclipped to the front page of the book. (If the patron didn’t return the barcode, that's okay. for the title APL\_ ILL, and look for the item with the call number that matches your ILL title.)

Click on the call number and change it back to “ILL - Available.” Save and close the item record.

Remove the barcode (and paperclip) from the book.

Returned ILLs

Sending the ILL back to the lending library.

Updated 12/16/18

Updated 12/16/18

Updated 12/16/18

Updated 12/16/2018

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