
ILL Procedures**INTERLIBRARY LOAN PROCEDURES
SCHOOL-TO-SCHOOL (ILL)**

The Online CoSer 572 provides database development of new resources purchased by each component school library to produce an updated School Library System Union Catalog in an online-based version that provides access to each participating school library within the OCM region. The Union Catalog also serves as a collection development tool and access to review MARC records. The Union Catalog qualifies as providing electronic access to library collections through the New York State Electronic Doorway Library program. The Union Catalog provides a means for students to develop online information skills and strategies that are essential for their success. The web version includes real time updates and a **school-to-school interlibrary loan component**. Access will be through a username and password or IP authentication. This service is also a clearinghouse for the handling and delivery of all interlibrary loan transactions between schools.

I. SCHOOL-TO-SCHOOL INTERLIBRARY LOAN TO REQUEST MATERIALS**Procedures to be followed by the BORROWING LIBRARY:**

The OCM School Library System Union Catalog (O.U.R.S.) is the valid verification tool for interlibrary loan requests **within** the system. Your first choice should be to request from the member school libraries.

NOTE: The "Request ILL" email function is the preferred method of communication for these loans. Therefore, email needs to be checked every day in order to have timely delivery and/or response.

A. Requesting a Resource (BOOKS & VARIOUS MEDIA)

1. Search OURS
2. Use "Request ILL" button
3. Maintain record of transaction

B. Requesting a Resource (SERIALS)

1. Search **OCM School Library System Union List of Serials** for source.
2. The **OCM School Library System Union List of Serials** is one of two verification tools for interlibrary loan requests for journals/magazines and article reprints within the system. Online periodical databases and other databases supported by the school, available through OCM School Library System, should also be consulted.
3. Journal/magazines articles and abstracts are available through several online databases available through OCM School Library System at: www.ocmboces.org/sls/home.htm
4. Note required information: Serial title, article title, author, issue date, volume #, article pages, and school code
5. Email or phone the lender with request
6. Maintain record of transaction

ILL Procedures**II. USING ILL TO SEND MATERIALS****Procedures to be followed by the LENDING LIBRARY:**

NOTE: Interlibrary loan requests should be communicated via email if possible. Alternate methods include fax, inter and intra-district mail, U.S. mail, telephone or other existing delivery methods within the region. **SLS provides ILL envelopes to be used exclusively for these transactions. Envelopes that are not filled out completely will experience a delay in shipping.** Mail being sent to other departments in BOCES should not be sent in ILL envelopes. To obtain more ILL envelopes, contact the Interlibrary Loan clerk at SLS. The library media center staff at each school is responsible for overseeing proper use of this delivery system.

A. Response Time

1. It is expected that all school librarians and personnel receiving interlibrary loan requests will respond to them promptly.
2. **Notify the requesting library of the availability of the item; whether or not it is available.**
3. All school librarians/personnel receiving interlibrary loan requests should forward the requested resource in the next courier delivery.

B. Filling the Request:

If resource requested is available for interlibrary loan, it is the lender's responsibility to:

1. Make sure the lender's school name and district are **clearly stamped** or labeled on the resource being sent.
2. Note any serious physical defects on the book pocket or other prominent place.
3. Determine the date due while taking into consideration delivery schedules and school vacation periods. (4 week loan policy)
4. Complete 001 Interlibrary Loan slip with "date due" and insert in item.
Refer to the Appendix for a sample form.
5. If the item being sent is a periodical request, make a photocopy of the requested article and attach a completed yellow ILL supply form, OO1A. Refer to the Appendix for a sample form.
6. Package the resource properly.
7. Use the most appropriate means to send the resource to the borrowing school:
 - a. BOCES courier service using film bag
 - b. U.S. Postal Service (mark the package "Library Rate" on the lower left-hand corner of the package).
 - b. If you have RIC delivery, use an ILL envelope for efficiency.
8. Maintain statistics on requests filled.

C. Resources unavailable for interlibrary loan

1. If the request cannot be filled, notify the requesting library as soon as possible.

ILL Procedures

III. USING ILL TO CIRCULATE BORROWED MATERIALS

Procedures to be followed by the BORROWING SCHOOL LIBRARY:

A. Receiving a Resource

1. Record the date the resource was received and its due date on the interlibrary loan recording system established by the library.
2. In the most appropriate manner, charge the resource out to the borrower:
 - a. For use in the borrower's library
 - Or*
 - b. For use outside of the borrower's library with a due date on the yellow 001 card (see Appendix) that will permit the return of the resource to the lender by the lender's stated due date.

NOTE: The "date due" on the original 001 card received will NOT reflect time needed for shipping. It is recommended, therefore, that you change that date on the 001 card so the user returns the item early enough to accommodate shipping.

3. Maintain record of transactions.

B. Returning the Resource

1. Acquire the resource for return to the lender by the stated due date.
2. Check the book in and/or record return of the item. Replace original 001 date due card.
3. Package the resource securely.
4. Return the resource to the lender, selecting the most appropriate means of delivery.

IV. Using ILL to RECEIVE MATERIALS BACK AFTER LOAN

Procedures to be followed by the LENDING LIBRARY

A. Receiving the Resource

1. Check in the resource.
 1. Inspect the resource for damages.
3. In case of damage the lending school library should contact the borrowing school library to report any expenses involved for repair or replacement.
4. Maintain records of the transaction on the interlibrary loan recording system established by the school library. *(For one possible way to keep a record of the transactions, see Sample Template in Appendix.)*

V. RENEWING A RESOURCE

- A. **Prior to the due date**, the borrowing school library should contact the lending school library directly to request an extended borrowing period. When books are obtained from the SLS Professional Collection, contact the OCM BOCES School Library System office **prior to the due date** to request a renewal.
- B. If the lending school library agrees to renew the resource, both the lender and the borrower should immediately record the new due date on all records.
- C. If the lending school library does not agree to renew the resource, the borrower should return it on or before the original due date.

ILL Procedures

- D. Renewal requests should be made only in cases of extreme need, as they require extra time and clerical work.
- E. Each renewal should be recorded on the statistics records as a separate loan for the lender and a filled request for the borrower.

VI. RECALLING A RESOURCE

- A. If the owning school library has a need for a resource in circulation at another school library, the lending library may contact the borrowing school library to seek its return before the due date.
- B. The borrowing school library should return the resource as soon as possible.

VII. REPORTING OVERDUE, DAMAGED OR LOST RESOURCES Procedures to be followed by lender or borrower.

- A. The lending school library should contact the borrowing school library to obtain the overdue material and/or indicate replacement costs or repair costs for the missing item.
- B. It is the privilege of the owning library to state policy regarding repair or replacement charges, replacement copies, and/or a processing fee.
- C. Repair costs should not exceed replacement charges.
- D. Replacement costs may be set by stating the actual current list replacement price of that resource from Books in Print, a publisher's catalog or appropriate web sites, or comparable replacement cost for out-of-print resources.
- E. Replacement charges are to be paid to the school district which owned the lost or damaged resource. Encourage students or faculty making payments for replacements or repairs to pay via check or money order in accordance with district policy.

VIII. OCM BOCES SCHOOL LIBRARY SYSTEM LOSS/DAMAGE ASSISTANCE

- A. The OCM BOCES School Library System budget shall assist schools for loss of, or damage to resources owned by another school district, when the condition listed below is met.

NOTE: A memo of explanation should be sent to the OCM BOCES School Library System office explaining that the replacement or repair costs cannot be collected by the borrowing school library.

- B. The resource will be purchased by the OCM BOCES School Library System, processed, and given to the school library that owned the lost or damaged resource. This will be done with the understanding that if the lost resource is ever found, the replacement will be returned to the OCM BOCES School Library System for its central collection.
- C. Before seeking replacements through the OCM BOCES School Library System, every effort to collect should be made at the local level.

ILL Procedures

VII. REPORTING INTERLIBRARY LOAN STATISTICS

Procedures to be followed by BORROWER and LENDER

- A. Every January and June, interlibrary loan statistics forms shall be forwarded to the School Library System office.
- B. Statistics include ALL interlibrary loan activity including loans between schools within the same district, loans outside of the district and loans through the SLS office.
- C. Report these statistics on the Interlibrary Loan Statistics form in the Appendix section.

VIII. PHOTOCOPYING

- A. The borrowing library will be responsible for photocopying charges beyond thirty-two (32) pages per request.
- B. Payment may be made to the school, which furnished the photocopies.
- C. The standard fee for photocopying beyond thirty-two (32) pages will be \$.15 per page.
- D. Students and teachers making such payments should be encouraged to use checks or money orders, payable as specified by the school which made the photocopies.

XI. LISTSERV GUIDELINES RELATING TO ILL

After checking in local and district library catalog:

- A. The first step for all ILL requests is to search the Online Union Resource Sharing catalog (O.U.R.S.)
- B. While searching O.U.R.S. for materials, ILL requests should be made using the email function in the program - "Request ILL" button. (Only CoSer 572 participants).
- C. If resource is not found by searching O.U.R.S., a request may be made on the ListServ, in the hope of the material being available but uncataloged. In this case, the Subject line in the email message should have "ILL," the grade level (Elem, Middle or High School) and the title of the material. This will help libraries minimize the number of email messages they process.
- D. If more than 5 copies of a title are needed and they are available through O.U.R.S., the Subject line should have the number of copies and the book title (is. "15 copies of Charlotte's Web"). If 5 or fewer copies are needed, individual copy requests should still be made through the ILL function of O.U.R.S.
- E. In the body of **every** ListServ message, whether for ILL or not, the sender's name, building and district should be included ("signature feature" in some email software).
- F. Lending library should confirm the loan of the material immediately so borrower knows it is coming or can accept the offer from someone else.

NOTE: Email needs to be checked every day in order to have timely delivery and/or response.

ILL Procedures

EXPANDED INTERLIBRARY LOAN SERVICE
COSER #572-2A

The interlibrary loan component includes verification and solicitation of books, periodicals and audio-visual resources from sites outside the jurisdiction of Onondaga-Cortland-Madison County component school districts. These sites include: New York State Library, Onondaga Public Library, academic, public or special libraries within the United States. The SLS will provide resources from international locations when appropriate. If you use the interlibrary loan services from the SLS office, this service is appropriate.

Expanded ILL Procedures

INTERLIBRARY LOAN PROCEDURES

EXPANDED INTERLIBRARY LOAN (EILL)

I. USING EXPANDED INTERLIBRARY LOAN TO REQUEST MATERIALS

Procedures to be followed by the **BORROWING LIBRARY**:

When a request cannot be satisfied within the OCM BOCES School Library Systems through school-to-school ILL, OCM BOCES School Library System will attempt to fill the request through outside referrals. All requests must originate from the school's library personnel.

NOTE: Requests for materials from all types of libraries outside our system are forwarded daily. There may be, depending upon where the requests get filled, a wait time of up to 3 weeks to get material from a library outside our system. Please have your patrons plan accordingly.

A. Requesting a Resource (ANY FORMAT)

Those wishing to obtain materials using EILL should contact the Interlibrary Loan clerk at OCM BOCES School Library System via Email or FAX. Consult your directory for a listing of numbers and addresses. Telephone contacts are not preferred, but will be accepted in emergency situations.

Printout of an online database abstract may be used if it provides the necessary EILL information.

EILL requests require the following information:

1. **Books:** title, author, copyright date, publisher, format (if special, i.e. large print, Braille, etc.) and the requesting school's school code
2. **Periodical Articles:** name of publication, volume, number, date, pages, article title, author, and the requesting school's school code
3. **Non-print resources** (as many of the following as possible): title, format; publisher, copyright date, ISBN, running time (if appropriate), any other available information and the requesting school's school code.

Note: In addition to above information, all EILL requests need to include a "not needed after" date to avoid unnecessary transactions.

B. Receiving a Resource (ANY FORMAT)

1. Record the date the resource was received and its due date on the interlibrary loan recording system established by the library.
2. In the most appropriate manner, charge the resource out to the borrower:
 - a. For use in the borrower's library
 - Or*
 - b. For use outside of the borrower's library with a due date on the yellow 001 card that will permit the return of the resource to the lender by the lender's stated due date. (Refer to Appendix section for copy of 001 card)

Expanded ILL Procedures

NOTE: The “date due” on the original 001 card received will NOT reflect time needed for shipping. It is recommended, therefore, that you change that date on the 001 card so the user returns the item early enough to accommodate shipping.

3. Maintain record of transaction.

C. Returning the Resource

1. Acquire the resource for return to the lender by the stated due date.
2. Check the resource in and/or record receipt of the item. Replace original 001 date due card.
3. Package the resource securely.
4. Return item(s) to the OCM BOCES School Library System. **DO NOT** return items to the original lender.
5. Maintain record of transaction.

D. Renewing a Resource

1. Contact the OCM BOCES School Library System office **prior to the due date** to request a renewal.
2. Renewal requests should be made only in cases of extreme need, as they require extra time and clerical work.

E. Recalling a Resource

1. If the owning library has a need for a resource in circulation OCM BOCES SLS may contact the borrowing school library to seek its return before the due date.
2. The borrowing school library should return the resource as soon as possible.

F. Reporting Overdue, Damaged or Lost Resources

1. For EILL, it is the school district’s responsibility to pay for lost/damaged materials.
2. Borrowers should notify the OCMBOCES School Library System Interlibrary Loan clerk in the case of overdue, damaged or lost resources.
3. The lending library will determine replacement prices of in-print and out-of-print resources by using a comparable fair market value, and will notify SLS and/or the borrowing library of the cost. If a replacement item is offered, the lending library reserves the right to determine the exact nature of replacement, i.e. payment, same book, or equivalent title. A processing fee for SLS handling of EILL replacements will be added to the replacement cost.

On-Line Research Service Procedures

EXPANDED INTERLIBRARY LOAN (EILL) ON-LINE RESEARCH SERVICE

The expanded interlibrary loan component includes verification and solicitation of books, periodicals and audio-visual resources from sites outside the jurisdiction of Onondaga-Cortland-Madison County component school districts. These sites include: New York State Library, Onondaga Public Library, academic, public or special libraries within the United States. The SLS will provide resources from international locations when appropriate. If you use the Expanded Interlibrary Loan services from the SLS office, this service is available.

Customized searches, including scientifically-based research, are conducted by a certified library media specialist, on any topic to meet the educational and information needs of staff and students. The School Library System staff has access to numerous databases such as: *Educational Resources Information Center (ERIC)*, *EBSCO*, *WorldCat*, *MedLine*, *C.E.R.F.*, *Articles First* and various Internet sites. Searches result in a bibliography of relevant documents meeting the specific criteria of the requestor. In addition, access to the cited documents is available through the interlibrary loan services of the Onondaga-Cortland-Madison School Library System. Requests may be specifically directed to a particular database or may be performed as the result of a reference question.

School districts participate in this service through a BOCES aidable Cooperative Service (CoSer) agreement.

I. Service Guidelines

Database search requests that will be provided through this BOCES CoSer must meet the following guidelines:

1. Requests will be honored only for a school district participating in the BOCES Expanded ILL Services (CoSer).
2. Requests must be submitted on a *School Library System Research Request* form (*see appendix*) and go through the school library media specialist.
3. There is no limit on the number of searches provided which are sponsored by a participating school for its instructional needs or educational benefit.
4. Reference questions or requests may result in the production of a database search at the discretion of the Onondaga-Cortland-Madison School Library System staff.
5. Location and either physical access to or photocopies of the documents cited by a database search will be provided for participating school districts.

Expanded ILL Procedures