INTERLIBRARY LOAN MANUAL

LINSCHEID LIBRARY
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Departmental Overview

Interlibrary loan (ILL) and document delivery are overseen by the Collection Services Department. Responsibilities include locating materials for ECU patrons that can be borrowed from other institutions, lending Linscheid Library materials to other institutions, and sending Linscheid Library materials to off-campus students. The Collection Services Assistant is responsible for daily interlibrary loan and document delivery procedures.

Special Resources and Software Used

Departmental email addresses
- Interlibrary Loan: ildept@ecok.edu
- Document Delivery: dodocdel@ecok.edu

Online forms (managed by the Collection Services librarian)
  - ILL forms (Sierra WebPAC)
    - Book: [http://library.ecok.edu/illb](http://library.ecok.edu/illb)
    - Article: [http://library.ecok.edu/illj](http://library.ecok.edu/illj)

When a patron fills out one of these forms, the request is sent directly to Sierra.

  - Document Delivery form (LibWizard)
    - Article: [https://ecok.libsurveys.com/DDarticle](https://ecok.libsurveys.com/DDarticle)

When a patron fills out one of these forms, an email is sent to both the document delivery and ILL departmental email addresses, as well as the Collection Services Librarian’s email address.

OCLC WorldShare: [https://eastcentraluniversity.share.worldcat.org/wms](https://eastcentraluniversity.share.worldcat.org/wms)
This software is used to request and lend items to and from other institutions. Logins are managed by the Worldshare administrator, the Collection Services Librarian.
ILL Borrowing

When a borrowing request is received from an ECU patron, the first step is to check the library catalog to make sure that Linscheid Library does not already own a copy of the item. To view new requests, log into Sierra and select New Requests in the Function drop-down menu in the upper right corner:

![Image of Sierra interface for New Requests]

Emailing Patrons from Sierra
If Linscheid Library already owns the requested title, email the patron to inform them that we have it:

1. Double-click on a request to view its details.
2. Click Notify.
   - Select the ILL message named “libmsg libhas”
   - Add a link to the item record in the online catalog: “The item you requested is available in the library: [insert link]. Please let us know if you need anything else.”
3. Click Send. This will send an email to the patron from illdept@ecok.edu.
4. Click Cancel. This moves the request from New Requests to Cancelled Requests.

We also have a general policy of not borrowing required textbooks. If a student requests a required textbook, follow the steps above using the “illsmg textbook” notification.

If we do not own the requested title, and it is not a required textbook for an ECU course, then we can proceed with processing the request through OCLC WorldShare.
Borrowing E-Journal Articles
As a general rule, we do not request articles from e-journals or chapters from e-books because the copyright laws can be unclear on this. However, if all other options for requesting from print sources have been exhausted, we may request an article from an electronic resource. Some lending institutions will not fill these requests, but the onus of copyright responsibility is ultimately on the lending library, so we can leave it up to them to decide.

Processing Borrowing Requests in Sierra
1. In the Sierra Function drop-down, select New Requests.
2. Highlight or double-click on the request(s), then click Acquire.
3. Choose OCLC direct ILL to review (the fields should auto-populate), then click Next.
4. Click Finish (the default date is sufficient), then Close the window.
   o This moves the request from New Requests to Pending Requests in Sierra.

Processing Email Requests from EBSCOhost
The online EBSCO platform allows users to request interlibrary loan material (usually an article) directly from the EBSCO interface. These requests are sent as emails to ildept@ecok.edu, and they appear in the subfolder titled “Request for interlibrary loan (generated by EBSCOhost)”, which is also the subject line for all of these emails.

1. Open the email on one screen, and open Sierra in the other.
2. In the Sierra Function drop-down, select Enter Requests.
3. In the drop-down on the top left, select Univ ID and enter the patron’s ID number from the email. Click Search.
4. Choose the appropriate request option and click Select.
5. Enter “Need by” date. If there is none, click Next to bypass this.
6. Enter the remaining information from the email (Author, Title, Publication date, etc.).
7. Once the information has been entered, select Acquire.
8. Choose OCLC direct ILL to review (the fields should auto-populate), then click Next.
9. Click Finish (the default date is sufficient), then Close the window.
10. Move the email to the current month’s subfolder in MS Outlook.
Searching for Open Access

Before sending article requests to other institutions, each title needs to be searched on Google Scholar to see if it is available for free online.

1. Open Google Scholar in a web browser: https://scholar.google.com
2. Search for the title using quotation marks.
3. If full text is available, there will be a link to the right of the article description. Click on it to make sure it works properly.
4. With the request record open in Sierra, click Notify.
   a) Select the ILL message named “illsmg open access”
5. Add the link to the full text of the article: “The item you requested is available online for free at this link: [insert link]. Please let us know if you need anything else.”
6. After notifying the patron, click Receive.
   a) Select Non-returnable.
   b) Send notice to requester: Select No
   c) Print mailing label: Select No
   d) Enter the OCLC Request Number into the OCLC Transaction# field
   e) Add “open access” after the transaction # (eg. “191901947 - open access”)
   f) Click Finish. This will move the request record to Filled Requests.
7. Once the Sierra record has been processed, click Change Fulfillment Type in the WorldShare request and select Open Access.

Note: When searching from a campus computer, Google Scholar will indicate whether we have access to an article from our library holdings. If this happens, click on the Full-Text @ Linscheid link to make sure the article is available.
Processing Borrowing Requests in OCLC WorldShare

1. Open a web browser and log into WorldShare, then click on the Interlibrary Loan tab.
2. On the left side of the screen, select Borrowing Requests.
3. Click New for Review to see requests that have not yet been processed.
4. Click on a record to open it.
5. In the upper right corner, the drop down should say BORROWER.
6. Make sure each piece of information for the request is in the correct box.
   • The author name is often in the “Article Title” field.
7. Search by ISSN for journals, or ISBN for books, by clicking the magnifying glass next to the field.
   • A hyphen may need to be added to the ISSN (e.g. 1234-4321).
8. Select State Holdings.
   • If there aren’t enough libraries, switch to All Holdings for more options.
9. Click Yes in the “Supplier” column to add it to the “Lender String.”
   • When possible, only choose suppliers who do not charge a fee.
     ▪ “Copies” refers to articles.
     ▪ “Loans” refers to physical items.
     ▪ Linscheid Library will cover the cost of an ILL for a faculty member, but not for a student. Students may be given the option to pay for an ILL, if they wish.
   • For article requests, make sure the library has the applicable volume and issue listed in the “Holdings” column.
10. Select as many suppliers as possible, fifteen is the maximum.
11. Click Update Request.
12. Print a copy of the request by selecting Print Now.
13. Click Send Request.
14. On the printed request sheet, write the first few words of the title along the left edge.
   • This makes it easier to find requests in the file folders, which are located next to the Collection Services Assistant’s desk.
15. File the printed requests alphabetically by title in their corresponding folders.
   • Article requests should be filed in Articles Not Received.
   • Books and other physical items should be filed in Books Not Received.
**Receiving Electronic Items**

1. Open Sierra **Pending Requests** on one screen, and open OCLC WorldShare on the other.
2. In WorldShare, click on **AE Alert** (Article Exchange).
   a) Click on a request to open it.
   b) Select **Email doc to patron** on the right side
   c) Copy the patron email from the corresponding Sierra record.
   d) Click **Send**. This will send them an email directly from illdept@ecok.edu.
   e) **NOTE:** Occasionally, other libraries will email a scanned article directly to illdept@ecok.edu. When this happens, you can forward this email directly to the patron who requested it.
      ▪ Email subject: ILL Request
      ▪ Body: “The document you requested is attached to this email.” or “The document you requested is available through the link and information provided below.”
3. Pull the printed request sheet from the **Articles Not Received** folder.
4. Circle which library filled the request, write the Receive Date, and file the request in the current month’s folder for filled borrowing requests.

![Image of a printed request sheet]

5. With the request record open in Sierra, select **Receive**.
   a) Select **Non-returnable**.
   b) Send notice to requester: Select **No**
   c) Print mailing label: Select **No**
   d) Enter the OCLC Request ID number into the **OCLC Transaction#** field
   e) Click **Finish**. This will move the request record to **Filled Requests**.
      ▪ You only have to mark **No** on the non-returnable fields the first time. It will remember your selections for the rest of the day.
      ▪ **Note:** There may be a message that asks “Not all fields have been completed, continue?” Verify that the fields you need are filled in, then click **Continue**.
6. Once the Sierra record has been processed, click **Mark as received** in the WorldShare request.
7. A copy of each Article Exchange email will be sent to illdept@ecok.edu. They are labeled as “Sent from OCLC WorldShare ILL on behalf of illdept@ecok.edu”
   - After marking these emails as Read in the inbox, move them to the subfolder titled **Sent from OCLC Worldshare**.

**Receiving Borrowed Physical Items**

The Student Assistants in the Director’s Office handle the library’s mail, and they will typically distribute the mail to each office in the early afternoon each day. The Collection Services Assistant or Student Assistants will open the mail. Packaging that is in decent shape will be saved for reuse, all other packaging is discarded.

Once a physical item has been unpackaged, pull the corresponding printed request sheet from the **Books Not Received** file folder, then follow these steps:

1. Open Sierra **Pending Requests** on one screen, and open OCLC WorldShare on the other.
2. In WorldShare, click on **In Transit**
3. Click on a request to open it.
4. On the printed request sheet, circle which library filled the request, write down the **Receive Date**, and write down the **Due Date** given by the lending library.
5. Fill out an ILL Pick Up slip and place it in the item.
   - The template used to print ECU ILL Pick Up slips is located on the K drive here: 
     [K:\LIBRARY\Collection Services\Interlibrary Loan](K:\LIBRARY\Collection Services\Interlibrary Loan)
6. File the printed request sheet in the **Books Received** folder.
8. With the request record open in Sierra, click **Notify**.
   a) Select the ILL message named “illsmg ill pickup.”
9. After notifying the patron, click **Receive**.
   a) Select **Returnable**.
   b) Enter the OCLC Request ID number into the **Barcode** field.
   c) Enter the Request ID number into the **OCLC Transaction#** field
   d) Enter the due date in the **Return By** field.
   e) Click **Finish**. This will move the request record to **Process Returns**.
10. Once the Sierra record has been processed, click **Mark as received** in the WorldShare request. This will move the request to **Received/In Use**.
11. A Student Assistant will take the item to the ILL Shelf behind Circulation. The Circulation Student Assistants will check the item out to the patron when they come to pick it up.
Returning Borrowed Physical Items

Patrons typically return interlibrary loan items at the Circulation Desk. The Circulation Student Assistants check the items in, then place them on a shelf behind the desk labeled “To 2nd Floor.” A Collection Services Student Assistant will regularly retrieve those items from that shelf and bring them down to the Collection Services office. For each returned item, follow these steps:

1. Pull the corresponding printed request sheet from the Books Received folder.
2. In Sierra, go to the Process Returns function.
   a) Click on the record to open it.
   b) Click Update.
   c) Select Returned on and click Next.
   d) Click Finish. This will move the request to Filled
      ▪ If you get a message that says “Process Failed,” it means the item wasn’t checked in at the Circulation Desk. You will need to go to the Check In function in Sierra, enter the letter b followed by the Request ID (e.g. b191524555), and click Search. (Select No on the Print Transit Slip window.)
3. In OCLC WorldShare, click on Received/In Use.
   a) Click on a record to open it.
   b) Scroll down to make sure the lending library’s address is correct.
   c) Check the box for Print Return Labels and click the Return item button.
      ▪ Do this for every item that needs to be returned, if there is more than one.
   d) Go to the Print Queue at the left.
   e) Select Return Labels.
   f) Check all, and click Request ID Barcode under the “include on labels” section.
   g) Click Print.
      ▪ Once all labels are printed, you can click Remove to clear them out.
      ▪ If there is a shipping label missing from the batch, they can be reprinted. Open the record, select Reprint Return Label under the Print Now dropdown.
4. Place the shipping labels with their corresponding items in the packaging area of the office.
   - A Student Assistant will package each item. ILL Packaging Instructions are located on the K Drive: K:\LIBRARY\Collection Services\Interlibrary Loan\Documentation
   - A Student Assistant from the Director’s Office will pick up these packages daily.
5. After packaging is completed, file the request sheets in the current month’s folder for filled borrowing requests.
Renewing a Borrowed Item

Patrons can request a renewal for an ILL item, but it is ultimately up to the lending library whether they are allowed to do so. If a patron knows ahead of time that they will need an item longer than the standard checkout period, it is best to get that information from them at the beginning so we can forward that to the lending library when we submit the borrowing request.

To submit a renewal request after an item has been received, follow these steps:
1. In OCLC WorldShare, open the request record by clicking on it in Received/In Use.
   - You can also find the record by searching with the request ID.
2. Click on the calendar icon next to the “Desired due date” box.
3. Select the date desired.
4. Click Renew item.
   - This will move the request to the Renewal Requested area of the Received borrowing requests.

If the renewal request is approved, follow these steps:
1. In Sierra, go to the Process Returns function.
2. Click on the record to open it.
3. Click Update
4. Select Need to return to supplier by, and click Next.
5. Enter the new due date, and click Finish.
6. Find the corresponding printed request sheet update the due date.

If the renewal request is not approved, contact the patron to let them know.
1. In Sierra, open the request in Process Returns.
2. Click Notify.
3. Select the ILL message named “illsmg no renewal”
   - Fill the due date after “The due date is still...”
Unfilled Requests
Occasionally, an ILL request will go through the Lender String in OCLC WorldShare without being filled. It will show up as Unfilled or Expired. Unfilled may mean that a library was unwilling to lend the item, or they could not find it. Expired means that a library did not respond to a request within the amount of time they indicate in OCLC they will respond (usually 4 days).

To request the item again, follow these steps:
1. In WorldShare, click on the request to open it.
2. Click on the New button in the upper right corner.
3. Create a new Lender String.
4. Click Send Request.
5. Cancel the old request.

After requesting an item more than once from all available libraries, follow these steps:
1. In Sierra, open the request in Pending Requests.
2. Click Notify.
3. Select the ILL message named “illmsg unfilled”
4. Cancel the request.

Common Borrowing Issues
No Barcode in the Sierra Record
If you process a borrowed item and forget to enter the OCLC Request ID number as the barcode, let the Circulation Assistant know that the item cannot be checked out in Sierra. Also write a note on the ILL Pick Up slip to alert the students to this, as well.

Un-editable ILL Requests
If Sierra closes unexpectedly, or you have to force quit the program due to an error, it will lock the ILL Request you had open. To unlock the request, open Sierra, go to any of the Interlibrary Loan functions, click Admin in the top toolbar, and then click Free ILL Requests.

Students Paying for ILLs
If a student agrees to pay a fee for an ILL item, let the Circulation Assistant know so that a manual fee can be placed on their account in Sierra and Jenzabar. Students will pay this fee at the Bursar’s office. All else will proceed as normal for requesting ILLs that cost us money. (Linscheid Library covers ILL fees for faculty.)

ILL Delivery to Off Campus Students
Linscheid Library does not usually send ILLs to patrons off campus, but exceptions can be made for faculty and graduate students at the discretion of the Collection Services Librarian. Some graduate programs are primarily online, so there are occasional requests from students who do not live in Ada. These requests are counted as both ILLs and Document Delivery, so remember to make a copy of the request sheet for the Document Delivery folder.
Non-pickup
If a patron does not pick up a borrowed book after several reminders, send the item back to the lending institution.

Overdue Items
If an ECU patron does not return an ILL by the due date, Sierra will notify them automatically. A patron can also be notified manually in Sierra using “illmsg OVERDUE” (see Emailing Patrons from Sierra). If the lending institution recalls the item, the patron should be notified that we need it back as soon as possible.

Here is a link to the official ILL Overdue policy, which is reviewed every 5 years:
K:\LIBRARY\Documentation\Policies & Procedures\ILL Overdue

Loss of Borrowed Items
An interlibrary loan item will be considered lost if it has not been returned within two weeks of the due date and the patron is non-responsive to requests to bring it back.

1. Mark the item as Lost in OCLC WorldShare.
2. Contact the lending institution’s ILL department as soon as possible to let them know the item is lost.
   • Inform them that we will either buy a replacement, or we will compensate them for the cost of the item—whichever they prefer.
3. Bill the patron for the full price of the item per the lending institution’s invoice.
   • If the lending library doesn’t tell us the cost of the item within three days of contacting them, bill the patron the standard cost for lost ILL items.
   • If the patron wishes to buy a replacement copy of the lost item, that is also acceptable.
4. Compensate the lending institution by sending them a replacement item or by paying the invoice they have sent.
   • After receiving an invoice, give it to the Assistant to the Director, who will pay the bill out of the other administrative expenses account number ending in 6030.
   • To replace the borrowed item, the Collection Services Assistant will work with the Assistant to the Director to purchase it using the same account listed above.
     ▪ The replacement work will then be sent to the lending library following normal ILL packaging procedures.
     ▪ If the lending institution has also sent us an invoice for the lost item, the replacement item will be sent back with a copy of the invoice, along with note saying “Replacement book in lieu of bill—please cancel invoice.”

If an item is lost in the mail en route to the lending institution, proceed with compensation as above without fining the patron.
ILL Lending

Linscheid Library participates in interlibrary loan with other libraries through OCLC WorldShare. Lending rules are maintained by the Collection Services Librarian and are found in the OCLC Policies Directory section of WorldShare. Our standard lending period matches the loan period we have for undergraduate students, and we typically do not lend non-circulating items in the collection. Exceptions can be made on a case-by-case basis at the discretion of the Collection Services Librarian.

In OCLC WorldShare, “Copies” refers to scanned items sent through Article Exchange, and “Loans” refers to physical items sent through the mail.

Turning Lending Off
If the Collection Services Assistant position is vacant for an extended period of time, Lending can be disabled in WorldShare to mitigate the ILL workload for library staff. To do this, go to the OCLC Policies Directory, click to edit the OCLC Supplier information, and select No next to OCLC Supplier. Alternatively, the Days to Respond could be changed to a different amount of time (the standard is 4 Days).

Lending New Books
Before lending a book that is located on the New Books Shelf, check with the liaison librarian for that item’s department to make sure a faculty member is not planning to pick up the book soon. A good rule of thumb is to wait 3 months from the date the item was cataloged.

Lending Children’s Literature
Many education and teaching courses will have assignments that require students to use books from the Children’s Literature section, so in order to keep these items available for our students, we do not typically loan them. Exceptions can be made on a case by case basis at the discretion of the Collection Services Librarian (for example, if we have 2 copies of an item, we can send one as an ILL).
**Processing Lending Requests in OCLC WorldShare**

1. In World Share, click on **Can You Supply?** under **Lending**.
2. Click on a request to open it.
3. Select “LOAN” from the drop-down on the right and click **Mark as considering**.
4. Check the library catalog to see if we have the item.
   - If the item is checked out, missing, new, non-circulating, or unavailable to be
     sent for any reason, select the applicable reason from the **No drop-down**. This
     will send the request to the next library on the Lender String.
5. If we have the item available, click **Print Now**.
6. Write the Location and Call Number of the item at the bottom of the printed request
   sheet (e.g. “4th floor, PS 3552 .A45 1962”).
7. Place the request sheet in the “ILL Articles to Find” box for a Student Assistant to find.
   - The Student Assistant will place the found item in the Collection Services
     Assistant’s Inbox.
8. In Sierra, go to the **Check Out** function and pull up the ILL department’s library account.
   a) Type in “nILL” (n is used for searching by name)
   b) Click **Search** or hit the Enter key.
   c) Select the Interlibrary Loan account
9. Scan (or type in) the item’s barcode, and click **Search** (or hit the Enter key) to check the
   item out.
10. Place a sticker over the RFID tag on the item.
    - This prevents the book from setting the alarm off when it leaves the building.
11. Open the request in WorldShare under **Considering - Loans**.
12. Check the boxes for **Print Shipping Labels** and **Print Book Straps/Stickers** and click **Yes**
    to indicate the item is being supplied.
13. After processing multiple lending requests using the steps above, go to the **Print Queue**.
    a) Select **Shipping Labels** or **Book Straps**.
    b) Check all, and click **Request ID Barcode** under the “include on labels” section
    c) Click **Print**.
      - Once all labels are printed, you can click Remove to clear them out.
      - If there is a shipping label missing from the batch, they can be reprinted.
        Open the record, select **Reprint Shipping Label** under the **Print Now**
        drop-down. This can also be done for **Book Straps**.
14. Place the shipping labels with their corresponding items in the packaging area of the
    office for a Student Assistant to package. ILL Packaging Instructions are on the K drive
    here: K:\LIBRARY\Collection Services\Interlibrary Loan\Documentation
15. On each printed request sheet, write the first few words of the title along the left edge.
16. File the request sheets in alphabetical order by title in the **Lending - Shipped** folder.
Receiving Loaned Physical Items

Once a physical item has been unpackaged, pull the corresponding printed request sheet from the Lending - Shipped file folder, then follow these steps:

1. In OCLC WorldShare, click on Returned/In Transit.
2. Click on a request to open it.
3. Click Checked-in/Complete.
4. Go to the Check-In function in Sierra.
5. Scan (or type in) the item’s barcode, and click Search (or hit the Enter key) to check the item in.
6. Remove the sticker covering the RFID tag.
7. On the printed request sheet, write the date under “Receive Date.”
8. File the request sheet in the current month’s folder for filled lending requests.
9. A Student Assistant will take the item upstairs for the Circulation Students to reshelve.

Lending Electronic Items

1. In OCLC World Share, click on Can You Supply? under Lending.
2. Click on a request to open it.
3. Select “COPY” from the drop-down on the right and click Mark as considering.
4. Check the library catalog to see if we have the item.
   - If the item is checked out, missing, new, non-circulating, or unavailable to be sent for any reason, select the applicable reason from the No drop-down. This will send the request to the next library on the Lender String.
5. If we have the item available, click Print Now.
6. Write the Location and Call Number at the bottom of the printed request sheet.
7. Place the request sheet in the “ILL Articles to Find” box for a Student Assistant to find.
   - When a student locates the journal, book, or microform title, they will scan the requested article. (See the Scanning ILL Documents section below.)
8. Review the pages of the electronic file to make sure they were scanned clearly.
9. Open the request in WorldShare and click OCLC Article Exchange.
   a) Select the appropriate file (from the Student Scans folder or a flash drive).
   b) Click Drop File
   c) Select Yes.
10. File the request sheet in the current month’s folder for filled lending requests.
**Scanning ILL Documents**
Most interlibrary loan scanning is done by Student Assistants. For bound periodicals, current periodicals, and book chapters, they will use the scanner next to the computer inside the Collection Services office. ILL Scanning Instructions can be found on the K Drive here: K:\LIBRARY\Collection Services\Interlibrary Loan\Documentation

For microform material, they will use the microform machine. Microform Reader Instructions can be found on the K Drive here: K:\LIBRARY\Collection Services\Periodicals\Documentation

**Lending E-Journal Articles**
As a general rule, we do not lend articles that we only have available online because the copyright laws can be unclear on this. Some exceptions can be made, but only if a publisher explicitly states that interlibrary loan is allowed for articles within that title. This information is usually found on license agreements, which are overseen by the Collection Services Librarian.

**Common Lending Issues**
**Requested Article not Library Collection**
Sometimes OCLC says we have a journal article available in our collection, but it is not in our library catalog. If we receive a lending request for a title we do not have, or if we do not have the necessary volume and issue of a title, send the ILL request information to the Collection Services Librarian to look into it. (Usually, this happens because the OCLC Local Holdings Record need to be updated.)

**International Loans**
International loans cost extra for shipping, but we do not charge them for this cost. We also do not put a tracking label on international loans.

**Non-OCLC Requests**
If you get a lending request that is not through OCLC WorldShare, use the ALA ILL Request Form (K:\LIBRARY\Collection Services\Interlibrary Loan). Print 2 copies of the form, one for our files and one to send with the ILL item. All other lending procedures are the same. After the item is returned, file the printed request sheet in the Document Delivery folder so that we can remember to include it in our statistics for the annual report.
Loss of Loaned Items
If a borrowing library loses one of our items, you will need to create an invoice printed on ECU letterhead (K:\LIBRARY\Collection Services\Interlibrary Loan\Invoices).

- The invoice should state that we will take a replacement copy of the item in similar or better condition than the item lost, or the cost of the item repaid with a check made out to the Linscheid Library.
- The invoice number will be the full date in MMDDYYYY format when the invoice is written. (e.g. 04122016 for an invoice created on April 12, 2016)
- A copy of this invoice will be sent to the both borrowing library and to the Assistant to the Director.

If the borrowing library sends a replacement item:
1. Send the item to Technical Services for processing. Include the bib # from the item being replaced.
2. Withdraw the lost item from the catalog.
3. Notify the Assistant to the Director that the item has been replaced and that the invoice for that item can be cancelled.

If the borrowing library sends a check:
1. Deposit into the Copier account ending in 63261 at the Bursar’s Office.
2. Scan the deposit receipt and save the file to the K Drive here: K:\LIBRARY\Collection Services\Interlibrary Loan\Invoices
3. Give the deposit receipt to the Assistant to the Director. Include a note that says it is payment for ILL invoice #XXXXXXXX.
Document Delivery

Document delivery is a service that allows students who are not located on the main campus to use Linscheid Library materials. To send items to a satellite campus, such as Durant or McAlester, we can utilize the courier that goes between campuses. However, the most common document delivery requests, are from students who are not located on a specific campus and take primarily online courses (typically graduate students).

Since document delivery involves similar mailing and scanning procedures as interlibrary loan, document delivery is the responsibility of the interlibrary loan department. Document delivery (DD) requests are not recorded in Sierra, so it is important to keep meticulous records of all DD requests, even if they are not completed.

The PCODE3 and PTYPE of all patrons requesting Document Delivery is reported in the ILL annual report, so keep track of these for all patrons requesting a document delivery.

Sending Physical Items

1. Print the DD request email that pops up in ildept@ecok.edu.
2. Find the item in the library’s online catalog.
3. Write the item’s call number and location on the bottom of the printed request sheet and send a Student Assistant to find retrieve it from the shelf.
4. In Sierra, go to the Check Out function and pull up the patron’s library account.
   • Search by University ID by typing “u” and then the number (eg. u123456)
   • Search by last name by typing “n” and then the name (eg. nLowry)
5. Scan (or type in) the item’s barcode to check the item out to the patron.
6. Place a sticker over the RFID tag on the item.
7. Print a Document Delivery Insert and a Return Label. These will be sent with the item.
   • You will need to change the due date on the DD Insert document before printing.
   • These items are located on the K Drive here: (K:\LIBRARY\Collection Services\Interlibrary Loan\Packaging and Shipping)
8. Print a Shipping Label showing the patron’s address.
9. A Student Assistant will package the item following the ILL Packaging Instructions (K:\LIBRARY\Collection Services\Interlibrary Loan\Documentation).
   • DO NOT FORGET to put the DD Insert and the Return Label inside the package.
10. On the printed request sheet, write “Sent” and today’s date, and file it in the current year’s Document Delivery folder.
**Sending Scanned Articles**

1. Print the DD request email that pops up in illdept@ecok.edu.
2. Find the item in the library’s online catalog.
3. Write the item’s call number and location on the bottom of the printed request sheet and sent a Student Assistant to retrieve it from the shelf.
4. A Student Assistant will scan the relevant pages, following the ILL Scanning Instructions (K:\LIBRARY\Collection Services\Interlibrary Loan\Documentation).
5. Once the item has been scanned, send an email to the patron with the file attached.
   - Email subject: Document Delivery
   - Body: “The document you requested is attached to this email message. Let us know if you need anything else.”
6. On the printed request sheet, write “Sent” and today’s date, and file it in the current year’s Document Delivery folder.

**File and Email Maintenance**

Periodically go through interlibrary loan and document delivery files by category to check the status of pending requests. If you find a request that has a due date that has passed, or one that was requested more than 30 days ago, pull the request sheet from the folder. Compare the requests sheets to the requests in OCLC WorldShare and Sierra to see what the status is. If there is a discrepancy, update the online request or the printed sheet so that they match each other and refile the sheet in the correct folder.

Sometimes a step in the process was overlooked, such as forgetting to mark a request as complete or received. Other times, a lending institution may not have responded to a pending request, and they need to be contacted. If a borrowing request has not been received, you may need to contact the patron to make sure they still need their item, or create a new borrowing request in WorldShare.

For loaned items that are overdue, mark them as overdue in WorldShare. If a borrowing institution has not returned an item within 10 days of its due date, contact them directly. If 30 days pass and they still have not returned the item, they may need to be sent an invoice from the Collection Services Librarian.

The Quarantine for illdept@ecok.edu needs to be checked carefully every day. Sometimes direct emails from other institutions are sent to this email address and will show up here before appearing in the inbox.

EBSCOhost request emails and OCLC WorldShare emails should be kept for the current and previous years. Any emails older than that can be deleted (eg. in January 2018, all 2016 emails can be deleted, but 2017 should be kept).