

Self-audit Checklist - best practices for ILL efficiency

Ask yourself... Are you handling Interlibrary Loan as efficiently as you can?

In order of greatest benefit, the 3 main areas to achieving ILL efficiency are:

1. Spread the workload by implementing patron initiated ILL and involving more staff
2. Invest in developing your VDX skills and good habits
3. VDX software configurations – electives the vendor can configure on your VDX account

Review this self-audit checklist to assess time and effort efficiencies you can incorporate into your daily VDX workflow.

1st Benefit: Spread the work load around - more hands make light work

Have you implemented Patron Initiated interlibrary loan?

Let the patron do the front-end work and initiate their own requests. One Ontario library conducted a time/cost study after implementing this service and found that a patron-initiated request took half the time and cost of a traditional borrow. Cost is dependent on salary grade of staff handling requests at various stages of request life cycle.

- Traditional staff mediated Borrow = 32 min, \$14
- Patron initiated Borrow = 14 min, \$6

Can you decentralize – can you get ILL out of the back workroom?

Have your public service desk and branch staff use the Zportal interface to VDX to submit requests on behalf of patrons they are serving at their locations. Searching in INFO catalog and using a Submit button is as fast for public service staff as filling in a paper request form or an online web form. This practice eliminates duplicating staff efforts, has less room for error, and patrons get ILL items faster. The ILL request is launched in VDX before ILL Dept. staff are even involved. There are variations for using VDX this way, depending on how ILL items are circulated at your location. See ***Staff Guide for Libraries Implementing Patron Initiated Interlibrary Library Loan (Pg 14)*** <https://www.olservice.ca/interlibrary-loan/how-to-use-vdx/patron-initiated-ill>

2nd Benefit: Developing SKILLS and good habits will save time in the long run

Are you aware of VDX training for new ILL staff?

Contact HelpDesk and visit our website for more information.

Do you use INFO HelpDesk for your ILL questions and problems?

Do you have a request status you don't understand or a procedure you need to be advised on? Questions about statistics or OLS mediation services for ILL? Call or email OLS HelpDesk with your interlibrary loan questions. We want to hear from you!

Do you make use of the VDX and ILL support tools on the OLS website? OLS HelpDesk sends announcements to ILL Dept. staff if new ILL or VDX documentation is posted to the website.

<https://www.olservice.ca/interlibrary-loan>

Are you in the loop? Are you receiving communications from OLS Helpdesk about interlibrary loan issues? Does OLS have current contact information for your ILL Dept staff?

When there is staff turn-over in libraries OLS HelpDesk may need to update VDX contact information in your VDX location record, online directories, VDX Announcement list, and Library and Archives Canada's national ILL Policies directory. It is important that library staff receive VDX user announcements, notice of new procedural documents or VDX and Library Shipping Tool technical issues. Please contact OLS HelpDesk to have your contact details updated. View the current email address we have for your library here - [Ontario public libraries participating in INFO with VDX codes, delivery and contact information.](#)

Do you use bibliographic search shortcuts to deliver concise results?

- ISBN search (Advanced – Field = ISBN)
- Use Search History link and Edit when you need to rerun a search against a different profile
- Create Custom Search Profiles (i.e. DVD lenders profile)
- Manipulate search results with Merge Duplicates, Sort or Format filters
- Search Google/Amazon/Worldcat to verify item details (typos or misspelling may be an issue)

See [VDX Training Manual Chapter 3 – Searching Catalogues for items](#)
[VDX Training Manual Chapter 12 \(pg. 6\) – Creating Custom Search Profiles](#)

- Do you trust the Work Queue to drive your workflow?**
 Everything that might need your attention at some stage in a request lifecycle is categorized in your Work Queue. It is all in the Work Queue....no need for paper files outside of VDX.
- Are there paper files maintained in conjunction with your VDX requests?**
 Are you filing paper request forms, maintaining 3 ring binders or Excel spreadsheets of what is requested? Let go of the paper and trust your VDX Work Queue and reports to drive your workflow. If your patron's name and pick-up location is on the VDX request, paper files are not necessary.
- Do you use all of the VDX reports that trigger ILL workflow?**
 Pick list, Shipping list, Received list, Returned list. If the patron's name and pickup location are on the request, you can rely on the Received list to facilitate patron notification for item pick-up.
- Do you have your ILS do the task of patron notification for ILL pickup?**
 Have your ILS do the patron pick-up communication by performing a brief add of a borrowed item and linking it to the patron's record with a HOLD. The ILS does the robo-call or email to the patron to pick up the held item. Saves staff making phone calls.
- Do you use VDX bulk action processing as a time saver wherever you can?**
 See [VDX Training Manual - Chapter 7 Bulk Action processing multiple requests](#)
- Do you use VDX Private Note section on requests?**
 This 'private view' note category is meant for staff to record notes regarding actions taken or "next-steps" instructions, for example: "If overdue item not back by xxx, send invoice for replacement." Especially useful if multiple staff are involved, or if you have a bad memory 😊
- Are you communicating with your patron from their VDX request?**
 Efficient communication with the patron can be achieved by using the VDX "Send User Alert" action on a request. Email sent from the request to the patron is useful for soliciting more information from the patron or advising a patron that an ILL item is overdue or cannot be filled. Quicker than making VDX printouts to remind you to make phone calls to patrons.
- Have you established a regular time weekly/monthly to perform VDX "housekeeping" to avoid time consuming problem solving in the future?**
 A penny now is worth a pound later. Set aside a regular time to do this, maybe first thing each Friday morning and at the end of each month. The goal is a VDX Work Queue that contains only current activity needing your attention, not one cluttered with Completed activity that will only cause confusion.
 See [VDX Training Manual Chapter 2 – Workflow and Work Queue](#)
- Do you have requests going into your IDLE work queue category that take up precious time "fixing"?**
 Do you understand that VDX needs an ISBN to build a request Rota or your request will be Idle?
 Do you know how to "Authorize" a request to location(s) of your choice?
 See [VDX Training Manual – Chapter 5 Rota Creation](#)
[VDX Training Manual – Chapter 9 Inactive and Not Supplied Borrower Requests](#)

Do you give up on a request if it becomes “End of Rota” in your Work Queue?

It may be faster to rejuvenate an End of Rota request instead of creating a new one, by practicing the 4 R’s – recycle, reserve, re-search, regrets.

See [VDX Training Manual – Chapter 9 Inactive and Not Supplied Borrower Requests](#)

Do you know when to use Terminate or Complete action on a request?

If you are not sure if you should use Terminate or if you can safely complete a VDX request remember this slogan “If its’ all about me... I can Complete”. For example, “Idle” or “End of Rota” requests that no other library is involved in and that you won’t be pursuing further or have created a new replacement request for, can be Completed.

Have you just said “No” on occasion?

Now and then when experiencing a heavy lender day... just say NO to a few of the requests on your picklist - even if you could provide them. You can do this with a bulk action “Answer Non-Supply: In use on loan”. With this response if another library does not fill the request the borrowing library can retry your location again in the future.

Are some of your ILL policies taking up precious time to enforce? Are they outdated?

- Are you checking stats to be sure you only lend the same number you borrow each month?
- Are you keeping manual track of the number of requests currently in the system for a specific patron because you limit to X requests per week or per month?
- Are you cancelling your patron’s borrowing requests for DVD because your library does not lend DVD, so you don’t request them either?
- Are you a taking extra time monitoring publication date on incoming requests due to inflexible lending rules?

3rd Benefit: Optional VDX Software Configurations – electives for efficiency

- Do you create VDX User records to facilitate branding requests with the patron’s contact details?**
 If you have opted to skip creating User records, that’s okay. You can still benefit from VDX workflow tools afforded by having patron details on your requests. Your VDX account for can be configured for manual text entry of patron details on each request. You will be able to use VDX Received Report to facilitate patron notification and look up requests by patron name search.
 See [VDX Training Manual Chapter 15 \(pg. 10\) User Records - Staff-No-Validate](#)
- Do you make phone calls to patrons to notify them of ILL items to be picked up?**
 If your ILS does not support email notification you can elect to have your VDX account configured to email patron pick up notifications triggered by applying the VDX ‘Received’ action on a borrowing request. Contact OLS HelpDesk to have this configured for you.
- Do you request a temporary lending suspension from HelpDesk when you will be short staffed or need time to do some catch up?**
 Send an email to helpdesk@olservice.ca with start date and end date and we will configure VDX to have your location skipped in the lender Rota for that time. This is usually done if a library is moving or renovating and their collection is temporarily inaccessible, or if they will be short staffed due to illness or vacation and have minimal back-up staff for the interlibrary loan function.
 See [VDX Training Manual Chapter 16 \(pg. 11\) - Lending Procedures - Suspensions](#)
- Do you have DocFind Auto Responder (DAR) auto-answering items before they go on your picklist?**
 OLS HelpDesk can have the VDX vendor configure DocFind Auto Responder (DAR) for libraries that surpass an annual incoming Responder requests threshold (currently 2500/annum). If you are a stand-alone Z39.50 target, your VDX account can be configured to generate an automated Non-Supply response based on some of your catalogue’s availability indicators.
 IMPACT: what staff must manually deal with on the lender picklist is reduced.
- Are there non print formats that you do not lend?**
 OLS HelpDesk can have the VDX vendor configure request “deflection” based on format so requests for formats you do not lend on interlibrary loan (i.e. DVD’s), do not land on your picklist.
 IMPACT: what staff must manually deal with on the lender picklist is reduced.

For more information, contact OLS HelpDesk

helpdesk@olservice.ca

1-800-387-5765 – ext. 4