
Chapter 16: Lending Procedures

Monitoring incoming requests to your Library

If you operate as a lender to other organizations you will need to monitor for incoming requests on a regular basis. All new requests for your location have a request status of **In Process**.

There are two options for becoming aware of incoming requests:

1. New requests from borrowing libraries will queue in [New Requests](#) category in Lender Work Queue.

Lender	
Status	Count
New Requests	13
New Requests Expiring Today	0

Pay attention to this queue. Act on them IMMEDIATELY if any appear here.



Important: You have requests for **4 working days** (Mon-Fri, not counting weekends or statutory holidays) before a request expires if you have not changed the status.

Expiry feature is a safeguard to keep requests moving if there should be a temporary problem at a responding location. Expiry should never be used as a “procedure” by a lending library to let the system move requests on. Network Participation policies specify that responding libraries will provide staff to the interlibrary loan function such that requests will be responded to within 48 hours.

1. New requests also queue in the [Pick List](#) report in Lender Work Queue. VDX will generate a printable list of all new requests that have come in since the last pick list was generated.

Note: The number on the pick list report will increment until the report is printed. After report is printed, the number of items in the report will reset to 0 and begin to increment again.

In this example, 3 new requests have come in since the last pick list was generated. The other 10 of the 13 New Requests awaiting your response were printed on earlier pick list(s).

Reports	
Pick List	3
Shipping List	0

Pick List - Used by Responder to find items on shelf

1. Pick List is printed by selecting the hyperlinked number in [Pick List](#) on the Lender Work Queue to generate the list. This report prints multiple items per page. It includes requests that have been designated **In Process** at your location **since** the last Standard Pick List was generated.
2. The Responder can:
 - use the call number and bibliographic information to check availability
 - write availability notes on the printed Pick List and collect items that are on shelf
 - view instructional information from the borrower in 'Request Notes'.
i.e. to provide an extended loan.
 - view requested format in 'Format' field. i.e. "Printed" or "Film-or-video-recording".
 - view requested 'Delivery Method'. i.e. "Postal Delivery" or "Faxed".
3. Select **Batch Reruns** in sidebar menu to get a reprint of previously generated lists should there be a paper jam or some other reason that the report needs to be printed again.

Picklist Item: 1 of 3	Request No.: 18113012	Printed: 06- AUG-2021	Batch No.: 4220	Status: Not Supplied
Call Number:				
Title: Braiding sweetgrass				
Sub Title::				
Author: Kimmerer, Robin Wall author.				
ISBN/ISSN: 1571313354 (hardback);9781571313355 (hardback);1571313567 (paperback);9781571313560 (paperback)				
Publisher: Milkweed Editions		Publication Date: 2013.;@2013		
Volume/Issue:				
Requester: Cobourg - Main		Service Level: Normal - Local Search		
Max Cost: 0		Service Type: Loan		
Format: Printed		Delivery Method: Postal Delivery		
Request Notes:				
Picklist Item: 2 of 3	Request No.: 18113080	Printed: 06- AUG-2021	Batch No.: 4220	Status: Shipped
Call Number:				
Title: In the frame				
Sub Title::				
Author: Francis, Dick 1920-				
ISBN/ISSN: 0718115279				
Publisher: Joseph		Publication Date: 1976.		
Volume/Issue:				
Requester: North Bay		Service Level: Normal - Local Search		
Max Cost: 0		Service Type: Loan		
Format: Printed		Delivery Method: Postal Delivery		
Request Notes: For Sargent Nodwell				

Answering New Requests for Loan



Tip: Use bulk action feature except on anomalies (i.e. different reason for Non-Supply, different due date for Shipped, different reason for Will Supply-In Process).

*See Chapter 7 - Bulk Action processing of multiple requests

Answer Conditional

This response indicates that a condition must be agreed to before responder will ship item. The requester must send a “Conditional Reply – Yes” response before responder will take further action.

- (a) Select **Answer Conditional** from ‘Action’ pull down menu and click Action button.
- (b) Select **Reason** from pull down menu on Action: Conditional Answer screen.
i.e. “Library use Only” or “Special collection supervision required”
- (c) Indicate proposed delivery method, if appropriate.
- (d) Add a Public or Private Note if appropriate.
- (e) Select “Reply” button to complete the process.

The request will queue under Conditional in your lender Work Queue. Do nothing further about providing the item at this stage. It will disappear from your Work Queue after 3 days if the borrowing library does not send a “Conditional Answer – Yes” response to your conditional offer.

If borrowing library updates the request with a “Conditional Answer – Yes” response, the request will appear under “In Process” category of Lender Work Queue. Follow up by shipping the item.

Answer Will Supply

This response confirms your intention to supply and is ***only used when there will be a short delay (a few days) before the Shipped status can be applied.** Commonly used when ILL Dept. staff have to retrieve item from stacks or a branch before shipping. This response holds request for further action and overrides the 4 day expiry period on the request.

- (a) Select **Answer Will Supply** from ‘Action’ pull down menu and click Action button.
- (b) Select **Reason** from pull down menu on Action: Answer Will Supply screen.
i.e. “Being processed for supply” or “In Process”
- (c) Add a Public or Private Note if appropriate. i.e. If useful to you, note which branch you are retrieving item from in “Private Note” for your own reference. Private Note is not seen by anyone other than your staff view of a request so it is useful for recording actions taken or intended next steps.
- (d) Select “Will Supply” button to complete the process.

Request will queue in “Will Supply” category of lender Work Queue. When item comes in from remote location, update by processing with Shipped action.



Important: Monitor aged items in the **Will Supply** category. It should only be a few days before items are upgraded to a shipped status. You should follow-up on older items that might languish here. Did the branch neglect to inform you that it was not on shelf/could not be found? You may need to update some Will Supply items to “Answer Non Supply: Not on shelf” if they are not retrieved in a timely fashion for shipping.

Answer Hold

This response confirms that you have placed a hold when you have been asked to reserve an item if it is not currently available for shipping. The requesting library types a “Please Place Hold...” statement in “Item Notes” and/or at the end of the Title field to draw your attention to their request for you to place a hold.

- (a) Select **Answer Hold** from ‘Action’ pull down menu and click Action button.
- (b) Select a date on calendar to populate the ‘Estimated Date Available’ field.
- (c) Add a Public or Private Note if appropriate.
- (d) Select “Hold” button to complete the process.



Important: Remember to place a HOLD for “Interlibrary Loan” on the item in your ILS so when it comes back from your patron it is apprehended to go to the ILL Dept. for shipping to the requesting library.

Answer Non-Supply

This response indicates that your location will not be supplying the item.

- (a) Select **Answer Non-supply** from ‘Action’ pull down menu and click Action button.
- (b) Select **Reason** from pull down menu, i.e. Lost, Non-Circulating, policy problem.
- (c) Add a Public or Private Note if appropriate.
- (d) Select “Non Supply” button to complete the process.

Requests processed Non-supply by a responder will Auto-Complete shortly after the Non-Supply action has updated the status and they will be removed from your work queue. The Auto-Complete is on the responder’s side only. For the borrower, the request will go to the next location in the Rota if there is one.

Answer Retry

This response indicates you are not able to supply currently but imbeds a suggested retry date so that if the request is not filled by another location, the system will automate the retry of a request to your location. Very helpful to a borrowing library if another library has not filled their request.

- (a) Select **Answer Retry** from ‘Action’ pull down menu and click Action button.
- (b) Select **Reason** from pull down menu on Action: Answer Retry screen. i.e. “In use on loan”
- (c) Select a date on calendar to populate the ‘Retry Date’ field. Usually a day or so after the due back date that your patron has the item out until.
- (d) Add a Public or Private Note if appropriate.
- (e) Select “Action” button to complete the process.

Do nothing further. If VDX automates the request back to your location after the retry date it will appear as a new “In Process” request on a future picklist.

Shipping requested items

Items you have pulled from your shelves to supply need to be prepared for shipping. They need request status updated to “Shipped” in VDX. Then print packing slip and address label and prepare for delivery via Canada Post (Library Material Rate postage rates).

1. Select **Shipped** from ‘Action’ pull down menu and click Action button.
2. Edit the “Shipped Service Type” if what you are sending is different than what is displayed.
3. Edit default 5 week loan due date if you wish.
4. Add a Public or Private Note if appropriate. i.e. Book jacket damage noted prior to shipping

Service Details

Requested Service Type	Loan
Shipped Service Type	Loan <input type="button" value="v"/>
Shipped Item	<input type="text"/>
Number of Items	<input type="text" value="1"/>
Ship Date	<input type="text" value="10 Aug 2021"/> <input type="button" value="c"/> (e.g. 10 Jun 2009)
Due Date	<input type="text" value="14 Sep 2021"/> <input type="button" value="c"/> (e.g. 10 Jun 2009)
Media Type	Printed <input type="button" value="v"/>
Delivery Method	Postal Delivery <input type="button" value="v"/>
E Delivery Params	<input type="button" value="v"/>
Conditions	<input type="button" value="v"/>

- **Shipped Service Type** can be changed from “Loan” to “copy non-returnable” if sending photocopies of pages that do not need to be returned



Note: When the service type is updated from **Loan** to **Copy non-returnable** or vice versa, the due date field is displayed or hidden appropriately so that the due date is only visible if the selected shipped service type is “loan” Service.

- **Number of items** change if it is multi-volume set
- **Ship Date** can be changed to a new date if you missed courier and it won't actually be shipped until your next courier pick up date
- **Due Date** defaults to 5 week loan, can be adjusted by selecting a different date on the calendar to give the requesting library less or more time
- **Media Type** usually “Printed” but could be “Video”, “Audio”, “Photocopy” etc.
- **Delivery Method** usually “postal delivery” but could be “fax”
- **Conditions** Commonly there are no conditions. Could be “client signature”, “library use only” etc. You can also select “Other” and type your specific conditions in Public Note.



Important: Check the item out to “Interlibrary Loan” in your ILS for the time frame it will be out of your library.

Ship Packing Slip and Address label

VDX generates an address label and printable packing slip to identify item to the requesting library for each item you have actioned as “shipped”.

Use [Shipping List](#) report indicator at bottom of Lender Work Queue after you have processed all items for shipping.

Reports	
Pick List	5
Shipping List	13

Alternately, a “one-off” print of a packing slip is available by viewing request in [Detail](#) mode and selecting “Standard Shipping list” from ‘Reports Available’ drop down menu at top left of screen.

Request Details	
Reports available:	Standard Shipping list <input type="button" value="Run"/>

1. Cut off the To: address block above the cut line to tape to the parcel.
2. Everything below the cut line comprises the packing slip to be included with book when it is shipped. The packing slip has request details, lender’s due date and borrowing library’s request number to facilitate their ‘Received’ processing when item arrives at their location.



Barrie - Main Public Library TO: Barrie - Main Public Library 60 Worsley Street Barrie, Ontario L4M 1L6
Waterloo PUBLIC - Main Public Library FROM: Waterloo PUBLIC - Main Public Library 35 Albert Street Waterloo, Ontario N2L 5E2
Barrie - Main Public Library TO: Barrie - Main Public Library 60 Worsley Street Barrie, Ontario L4M 1L6
Request Date: 03-AUG-2021 Date Shipped: 06-AUG-2021 Delivery Method: Postal Delivery Billing Method: Cost: .00
Please quote responder number [18107249] on any inquiries Your original request number is [18107160]
Author: Wolf, Tobias 1945- Title: The barracks thief

Cut off Address label to tape to parcel

Remainder is the Packing slip to travel with requested item.



*See **Library Material Rate** on the OLS website for instructions for creating mailing labels using Library Material Rate electronic shipping tool.

Check-In returned loans

It is the Checked-in action applied by the lender that causes a request to “auto-complete” and be removed from active request file for both the lender and the borrower.



This is a critical step, in a request life cycle. When the item you lent through interlibrary loan is returned to your library it must be processed as 'Checked-In' to provide closure. It is also important to prevent items from being declared "overdue" or missing in transit.

1. Select **Checked-In** from 'Actions' pull down menu on relevant request.
2. Current date appears in 'Check in Date' field on Action: Checked-In screen. Change date or add Notes if relevant.
3. Select "Check In" button to complete the process.



Tip: You can perform Check-In processing with bulk action. Save the Return "Thank you" packing slips from returned items as they are unpacked. The Request number is on the slips for entry into a bulk action screen. *See "Bulk Action processing of multiple requests".

Looking for "missed" Checked-ins

Routinely, lenders should look for requests that may have missed getting the VDX Checked-in action.

- Select Lender "Returned" category on Work Queue

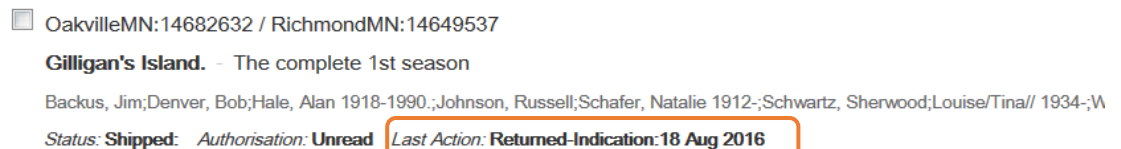


- Sort resulting list in 'ascending' order to view oldest 'Returned-Indication' first.

Results for: Advanced Search



- If you discover a request that got missed, check your ILS to confirm item is returned and apply "Checked-in" action for closure.



Cancel Requested response

Requests to cancel should be responded to in a timely fashion.

1. Monitor the **Cancel Requested** category on the Lender Work Queue.
2. Select [Details](#) link. Scroll down to request History.
 - Is request still 'In Process' at your location? (you would use Cancel Reply-Yes)
 - Have you shipped the item? (you would use Cancel Reply-No)
3. Select **Cancel Reply-Yes** or **Cancel Reply-No** from 'Actions' pull down menu and process accordingly.

If you use Cancel Reply-Yes the request will 'auto-complete' as a finished request and no longer appear in your work queue.

Renewal Requested response

Borrowing libraries will ask for an extended due date by sending a request for renewal. It is up to the lending library if they will grant or deny a renewal.

1. Monitor the **Renewal Requested** category on the Lender Work Queue.
2. Select **Renew Answer-Yes** or **Renew Answer- No** from 'Actions' pull down menu.
 - (a) If responding "Yes" complete Action: Renew Answer-Yes screen with a new due date and notes as required and submit.

Request status updates to Shipped with Last Action: Renew Answer-Yes

- (b) If responding "No" complete Action: Renew Answer-No screen.

Request status updates to Shipped with Last Action: Renew Answer-No

Overdue loaned items

VDX automatically generates ILL overdue status updates from lending library to borrowing library when VDX detects that a lender's Shipped status has not been updated to Returned within a preset number of days of the Due Date expiring.

Overdue requests display in the Lender's Work Queue under two categories:

- **Overdue**
Status=Shipped with expired due date + 14 calendar days will automatically update to Status: Overdue and queue in "Overdue" category.

At the same time VDX generates ILL Overdue status update to borrowing library so that it displays under "Overdue" in their borrower Work Queue.
- **Overdue > 4 weeks**
Status=Overdue with expired due date greater than 4 weeks will queue in "Overdue > 4 weeks" category in Work Queue.

It is up to the lending library if they want to follow-up on overdue items by sending a 'Public Note' on the request to urge the borrowing library to "chase their patron" to return the overdue item.

Recall loaned Items

If you lent an item through interlibrary loan but need it returned before the due date, you may recall it.

- (a) Select **Recall** from 'Actions' pull down menu on relevant request.
- (b) Add a Public and/or Private note if appropriate.

i.e. Please return item right away, it is needed by November 10 for author's visit.

- (c) Select "Recall" button to complete the process.

Lost Items

At some point either the borrowing or lending library may upgrade an overdue request with the "Lost" action if efforts to get it back to the lending library fail.

The request will display in the Work Queue as either "Reported Lost by Borrower" or "Reported Lost by Lender".

It is up to the lending library to send an invoice to the borrowing library for replacement cost of lost items, or indicate that the loss is forgiven and you are not seeking compensation.

Once payment has been received the lending library is responsible for using the "Check-in" action for closure. Add a Private Note when applying the "Check-in" action noting that the lost item was invoiced and payment received.

Suspending Lending Services

Temporary suspension of lending services is appropriate if you will be short staffed (position vacancies, staff illness or vacation), migrating to a new ILS, etc. The library may continue their own borrowing activity during the time that lending activity is suspended.

Sometimes, it is appropriate to suspend both lending and borrowing activity, if there is a library closure due to renovations or moving and the ILL Department will be completely shut down. This would be particularly relevant for libraries that have patrons initiating their own ILL requests.

Requesting a suspension for your library

Send email to INFO HelpDesk (helpdesk@olservice.ca) stating your library name, the reason for the suspension, and the start and end date. HelpDesk will reply to confirm that the suspension has been configured.

How VDX handles suspended locations

- VDX prevents lending requests from going to the suspended location between the start and end dates of the suspension.
- It is possible to add a suspended or to-be-suspended location to the Rota, either manually or automatically, however, they will be skipped over if they are suspended at the time the request tries to route to them.
- When displaying location details in any of the request Rota displays, two icons are included under the following conditions:



IF suspension start date is greater than today AND is less than 28 days into the future VDX displays “clock” icon



IF suspension start date is before or equal to today AND the end date is after or equal to today then VDX displays the “no entry” icon

▼ [Rota Details](#)

Seq	Location
1	St. Thomas - Main
2	Orillia - Main
3	Aurora - Main
4	Peterborough - Main
5	Pickering - Main

Float cursor over icon in **Rota Details** to display suspension dates.



▼ [History](#)

Lender	Action
Toronto - Reference Main	REQUEST
Toronto - Reference Main	Answer Nonsupply
Mississauga - Main	REQUEST
Mississauga - Main	Answer Nonsupply-Inc
Pickering - Main	REQUEST
Pickering - Main	Suspended

Select suspended location name in **History** and a pop-up displays suspension details.

Location	
Location Name	Pickering - Main
Suspended	Yes
From	01 Nov 2017
To	15 Nov 2017

Global pre-set Statutory Holidays and Christmas - New Year shutdown:

- Statutory holiday closures are pre-configured in VDX for the calendar year.
- As many interlibrary loan departments are closed over the Christmas-New Year period, INFO VDX will also be globally configured to freeze requests from expiring and moving on to the next Rota location from Dec 20 (approx.) to Jan 2 inclusive.
- Requests can still be issued during this time and will go to the first Rota location but will not move on unless that first location deals with the request. This Christmas/New Year's Rota freeze will cover all libraries. If your library will shut down much earlier than that, please let Helpdesk know so we can configure the additional dates for your location.

Lending Library's ILL Policies

The INFO network participation guidelines, titled **INFO Resource Sharing Network Participation Policies and Standards** are based on a simple concept:

The network seeks to balance both extremities of a continuum:

- (a) every Ontarian has the right to request any material he/she requires
- (b) every Ontario Public Library has the right to control their own collections

Loosely translated: “The lending libraries ILL policy drives the bus”

Borrowing libraries can issue requests for their patron's requirements (balanced with common sense and awareness of publication date, bestseller and popularity status) and some library in the network might be willing to lend it, where others may have restrictions on what they are willing to lend based on publication date or format.

Lenders should review/update their ILL Lending Policy occasionally

Lending libraries are encouraged to review their ILL lending policies annually and update them based on current interlibrary loan trends. Most libraries these days are willing to lend just about anything that is currently not in high demand in their library, even current year publication date.

Media Loan List – policy on lending non-print formats

Lending libraries can indicate their **willingness to lend non-print formats** by submitting information to a **Media Loan List** available on the OLS website. Borrowing libraries can consult this list to see which libraries are lending DVDs, Videos, and Books on Tape, Talking Books, and Books on CD, Music CDs, and Newspapers on Microfilm.