ILL/CIRC Overdues Workflow

Presenters: Attendees
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Fall 2008 MnPALS User Group
Overview

• Review relationship between ILL and circulation
  – Overdues
  – Lost
  – Recalls

• Focus will be on workflow- please share your policies or workflow ideas
Overdues in ILL and Circulation

**Lending ILL unit**
Ship – enter item barcode to loan item to borrowing ILL unit.

**Borrowing ILL unit**
Receive-enter ILL request number or Item barcode
This creates an Item record in circulation

**Lending ILL Unit**
Send overdue on ILL request

**Circulation at lending library**
Can send an overdue circulation notice to borrowing ILL unit

**Circulation at borrowing library**
Loan ILL item to the patron

**Circulation at borrowing library**
Can send overdue on the loan of the ILL request
Overdues in ILL module

The lending library can send an overdue to the borrowing library.
- changes the ILL request status for Borrowing library staff to see
- Changes the ILL request status for the patron to see.
Overdue-ILL

All MnPALS libraries have the Lending library Overdue service setup to run for their ILL unit.
Lending-Overdue service only

• The patron does not get an email or paper notice of this overdue. Borrowing staff must use “Print” and send an overdue notice.
Circulation Overdues- for borrowed ILL items

Overdue circulation notices can be sent on the ILL item loaned to your patron.

- When an item is Received by the borrowing library an item record is created.
- This item record has an Item status of 91.
- The loan of that item record can be managed like a loan of any other item from your collection
Overdue Borrowing library -Circulation to patron

- The ILL request is loaned to the patron
- The borrowing library has setup in tab 18 and tab 32 overdue circulation notices.
- When your other circulation notices run these notices are part of it.
Circulation runs notices

This setup is done in tab 32 and tab 18.

The patron gets an overdue circulation notice on the ILL request loan.
Workflow

• Does your ILL unit loan ILL requests to patrons?
• Do you send circulation overdue notices to your patrons on loaned ILL items?
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Circulation at borrowing library
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Overdue-Lending library circulation

• When an ILL request is Shipped the item is loaned to the borrowing library patron record
  – The patron status for the ILL unit patron record is 05.

• The loan of the item to the borrowing library can be setup for overdues.
Borrowing ILL unit patron record

When an ILL request is shipped, the item is loaned to the borrowing ILL unit patron record.
Workflow

• Should the lending library circulation send a circulation overdue to the borrowing library staff?
• As a borrowing library staff person when you get an overdue from a lending library what do you do?
Overdue, Damaged and Lost Materials – Recommendations of the MINITEX/MnLINK Interlibrary Loan Committee

Overdues

Executive Summary
• The following are recommendations for monitoring, processing, and paying for overdue, damaged, and lost materials:

Recommendations:
• The Committee strongly recommends that all libraries implement a means of automatically generating overdue notices for their patrons who have borrowed interlibrary loan materials. The borrowing library retains responsibility for all communication with their patrons.
Lost- ILL only

• Lost is a Message that the Borrowing library sends to the Lending library
• Lost in ILL is done once the patron or borrowing staff have determined that an item will not be returned.
• Once payment has been received the lending library will do a “Check-in”. This closes the request.
• Lending library will need to process the book.
  – Status in OPAC
  – Do you order another copy?
Borrowing ILL staff send Lost

When the patron or staff realize item is lost.

Borrowing ILL staff will click on “Response” and select “Lost”
Workflow

• As the lending library do you monitor your ILL requests?
  – What action do you take?
• As the borrowing library do you monitor your requests?
  - What action do you take?
Lost in Circulation and ILL
Your patron has the ILL request

• As the borrowing library you loaned the ILL request to the patron in Circulation

• Can bill patron when item is identified as lost
  – Circulation Loan and Lost button

• Can automatically bill the patron
  – loaned ILL request can automatically go to Lost (billed)
  – Setup is done in tab 32 and tab 18.
Workflow

• As a borrowing library do you automatically bill your patrons for loaned ILL request?
  – Does it get the item back?
  – Is there a difference between what the patron pays and what the lending library sets as the price?

• As the borrowing library do you generate a bill to the patron when lending library notifies you about the item?
Lost in ILL and Circulation

**Lending ILL unit**
- Message on status of ILL request
- Message bill amount

**Borrowing ILL unit**
- Message on status of ILL request

**Circulation at lending library**
- Can send bill to borrowing library - automatic or bill for amount

**Circulation at borrowing library**
- Bill patron automatically or bill for amount from lending library

**Lending ILL unit**
- Payment received
- Do Check-in

**Borrowing ILL unit**
- Send Payment
- Send Lost

**Lending library**
- Item status in OPAC
- Will order this item?
- Check payment is shown for Borrowing ILL unit

**Circulation at borrowing library**
- Show patron has paid for Item
- Discharge item record
Lending library- circulation

• As the lending library for an item you have supplied.
  – The item is loaned to the borrowing ILL unit patron record

• Can bill ILL borrowing unit when item is identified as lost
  – Circulation Loan and Lost button

• Can automatically bill the ILL borrowing unit
  – loaned ILL request can automatically go to Lost (billed)
  – Setup is done in tab 32 and tab 18.
Workflow questions

• As the lending library do you bill the borrowing library automatically?
  – Do you get responses?

• As a borrowing library if you get a notice from a lending library what do you do?
Overdue, Damaged and Lost Materials – Recommendations of the MINITEX/MnLINK Interlibrary Loan Committee

Lost ILL requests

• The committee strongly recommends that lending libraries send an invoice not later than six months after the due date. The borrowing library may request an invoice from the lending library at any point that they determine the item is lost (or damaged). If the lending library does not provide an invoice within six months of the due date (or within six months after being requested by the borrowing library), the borrowing library may assume there will be no charge for the item.

• The committee strongly recommends that once a request has been updated to “checked in” on the interlibrary loan system of the lending library, the borrowing library is no longer responsible for the item.
Recall-ILL

• Lending library sends a Recall.
• The Lending library Recall changes the ILL borrowing request status for the borrowing staff and the patron to see
Recall- borrowing ILL unit loans request to patron

• Your patron sees the Recall but does not get the new recalled due date
  – The borrowing library should do a Recall Answer. The Recall Answer is not functioning.

• As a work-around the borrowing library should go to Circulation find the loan and use Change Due date and enter the recalled due date.

• Then go to ILL2 and use “Print” and send “Recall notice”
Recall-lending

Click on Response and select Recall.

Lending library sends a recall with the new "Recall due date".
Borrowing library sees Recall

The image shows a computer screenshot of a library borrowing system. The system includes a list of requests with details such as title, request number, status, last activity, and notes. The specific request listed is for a book titled "Protestants, Catholics, and Jews in Germany, 1800-1914" with a request number of 34893. The status is "Recalled," and the last activity date is 10/21/08. The notes include "When convenient (Local)."
Borrowing library would then do Recall Answer. This functionality is not working.
Borrowing library-work around Circulation- Change Due date

In Circulation, staff will use “Change Date” to change due date for the ILL request loan.
Borrowing ILL request - Print
I LL - Recall Letter

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Patron ID: 000000000027
Patron Barcode: 29999000037176

We regret to inform you that the Lending Library has requested that your ILL item be returned earlier than the original due date.

The new Due Date is: 10/25/2008

Please return the item by the new Due Date.

Note: This item has been recalled. New due date is 10/25/2008

Request Details:

Request No. 34893
Request Date 10/21/2008
Title Protestants, Catholics, and Jews in Germany, 1800-1914 / edited by Helmut Walser Smith.
Author of Article/Part Smith, Helmut Walser, 1902-
ISBN/ISSN 1859735605 (cloth)
Item Barcode: ILL-34893
Item Status: ILL
Sublibrary: TST Main Library
Collection: ILL
Call No: 000034893
Original Due Date: 10/21/2008
New Due Date: 10/25/2008
As a lending library

- Do you recall for holds?
- When do you recall an item?
Now what?

• How do you want to manage overdues?
  – When it is your patron?
• How do you want to manage overdues?
  – When it is your item?

Look at tab 32 and tab 18 for

  Item status 91- your patron has this borrowed item
  Patron status 05- your item sent to another library
• How do you want to manage billing for items (lost)?
  – When it is your patron?

• How do you want to manage billing for items (lost)?
  – When it is your item?

Look at tab 32 and tab 18 for
  Item status 91- your patron has this borrowed item
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