



Processing Interlibrary Loan Items in PINES: Best Practices

You can use the functionality in Evergreen to assist you in tracking ILL lends and borrows. Checking out the item you are lending to another library in the PINES database also assists patrons and staff since it keeps the item visible in the OPAC, identifies it as checked out, and allows holds to be placed. If you permit renewals of items loaned to other libraries through OCLC's WorldShare ILL, giving patrons and staff the ability to place a hold on the title in the PINES database while it is out on loan to the borrowing library will help you decide whether to allow a renewal or not. Checking out items borrowed from other libraries to the requesting patron assists you in billing for any fees from the lending library for the loan, charging overdue fines if returned late, or billing the patron for the item if it is not returned. It also allows for emailed reminders to the patron that the item is due.

Processing OCLC WorldShare ILL Lends in PINES

When lending an item in your collection to a library through OCLC WorldShare ILL, processing in PINES is fairly simple. If there is not already one set up to use, ask circulation staff to create a generic card to use only and specifically for ILLs. This card should be a staff card so that it does not accrue fines. Many libraries name the card POLICY NAME ILL (STATELIB-L ILL, for example).

Check the item you are loaning to another library out on the generic card, editing the due date to be the one in WorldShare ILL for the item. If you allow a renewal, remember to renew in PINES as well. On return from the borrowing library, the item should be checked in before it is returned to your library shelves.

You may also want to monitor the card on a regular basis to make sure items aren't left checked out on it after they have been returned.

Checking out the item to a designated card means that you should not edit the item status to ILL.

Processing OCLC's WorldShare ILL Borrows in PINES

The best way to circulate ILL items in PINES so that they are associated with the requesting patron record for ease of tracking is to use the **Pre-Cat** functionality. You can use the existing barcode on the item to create the brief record that can then be used to check the ILL item out to the patron. With this process you will need to check out the item to the patron before they are in the library. Since the loaning library sets the due date of the item, when the patron picks up the item is not relevant to its return date. After you have added the item, renew the item twice to prevent the patron from renewing without authorization from the loaning library, and edit the due date to the desired date. On return, the item should be deleted from the database using the **Item Status (F5)** screen. Cataloging staff will need to assist you in deleting the item.

If the ILL item is not to be taken from the library, it is up to local policy whether or not you create the **Pre-Cat** record and check it out to the requesting patron.



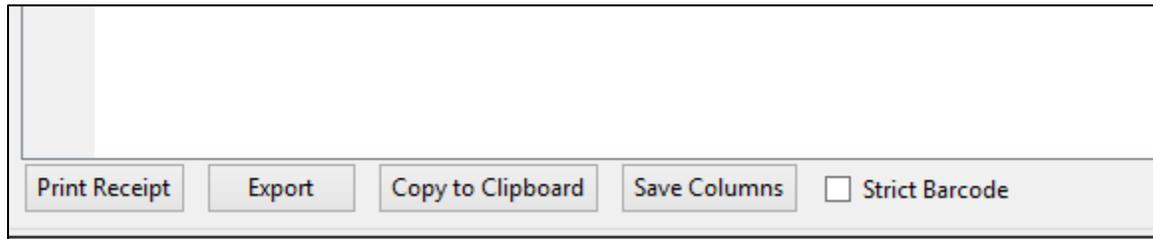
Make sure any ILL item borrowed from another library is clearly identified as such so that circulation staff know how to route and handle it on return.

Since **Pre-Cataloged** items are essentially just place holders, they only appear on the patron record and in a **Display Item (F5)** search. They cannot be located through a basic or advanced search so other patrons will not be able to find the item in the OPAC. Since the record is not visible in the OPAC, holds cannot be placed on it.

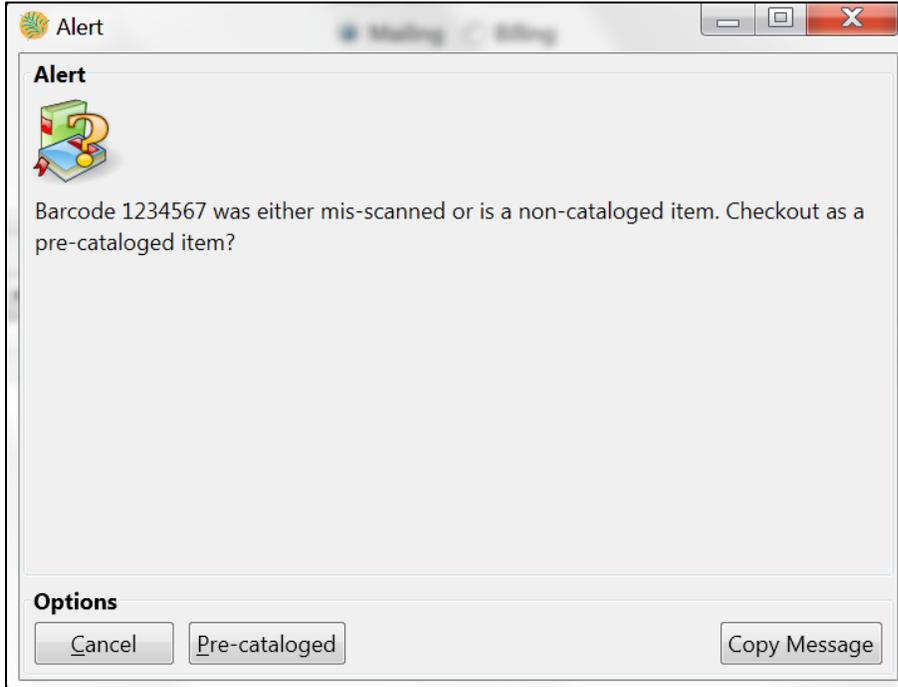
Creating Pre-Cataloged Item records

Pre-cataloged functionality (**Pre-Cat**) in Evergreen allows for the circulation of an item a patron found on the shelf that is not in the database. Using this same functionality for items on loan from other libraries through WorldShare ILL provides an easy way to directly associate the item with the borrowing patron in the Evergreen ILS. Keep in mind that these **Pre-Cat** records are more like place holders and do not display in the OPAC and have limited display in the staff client. The barcode for the item should be sent to cataloging for deletion after the item is returned by the patron and checked in.

Once the loaned item has been received and processed in OCLC, retrieve the requesting patron in the PINES system as you would for normal check out. Make sure **Strict Barcode** is not checked so that the system will read any non-Codabar barcodes:

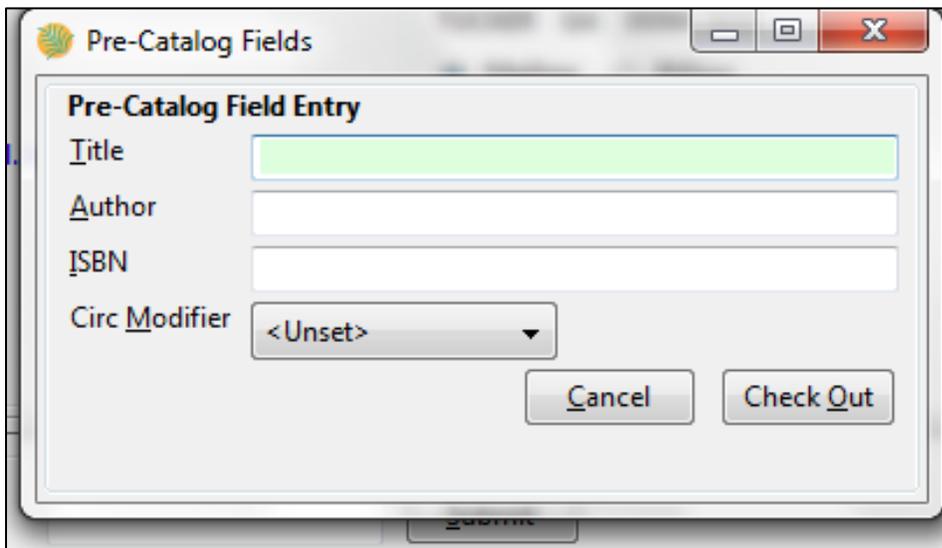


Scan or type in the item's barcode. A warning box will display:



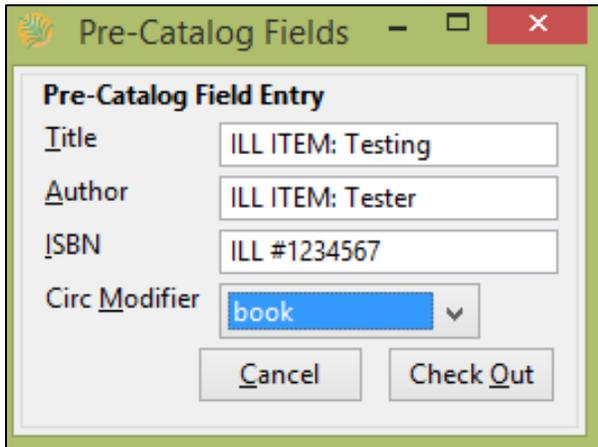
Review the barcode displayed in the alert box to make sure it scanned correctly. **Creating a pre-cat item with an incorrectly scanned barcode will mean that the item cannot be checked in on return and will remain on the patron record.**

Once you are sure it scanned correctly, click on the **Pre-Cataloged** button. A small dialog box will open to input title, author, and circulation modifier to allow for circulation.

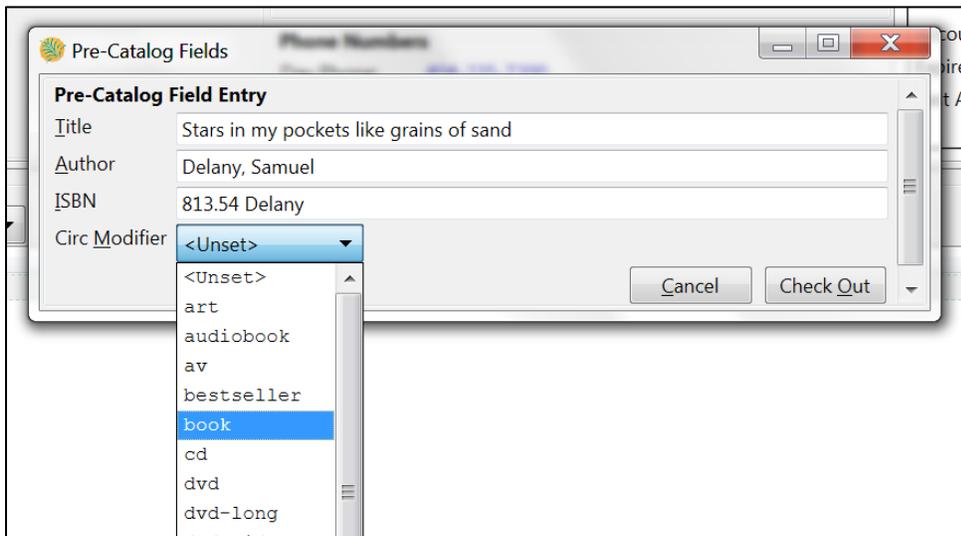




Enter the title and author of the book. Some libraries include ILL ITEM: in order to tell at a glance on the patron record and on any reports run for **Pre-Cats** that the record is for ILL tracking. You could also enter the ILL Request ID number in place of an ISBN:



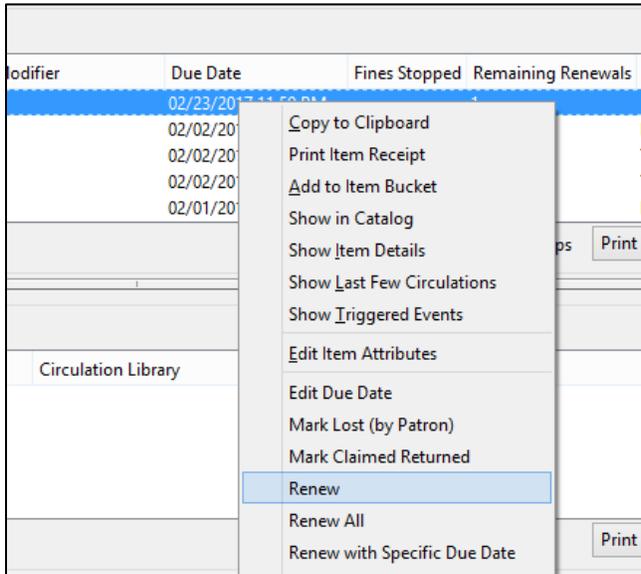
Next choose the appropriate **Circ Modifier** from the dropdown box. This will most likely be **book**. You will be circumventing the circulation rules for the circulation modifier when you complete the checkout process. The rules will default to those for **book** if it is left unset:



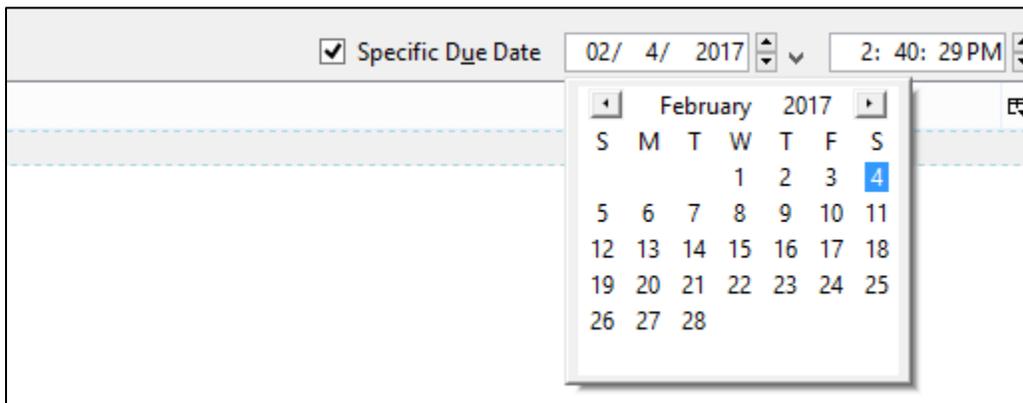
After choosing a **Circ Modifier**, click on **Check Out**.



Since the lending library must approve any requests for renewal, you should renew the item twice so that the patron must contact your library for assistance. Go to the **Items Out** tab in the patron record and renew the item:



At this point, you need to edit the due date to accommodate the lending library's due date. Always add sufficient time for processing the ILL and for courier or other carrier delivery to the lending library:

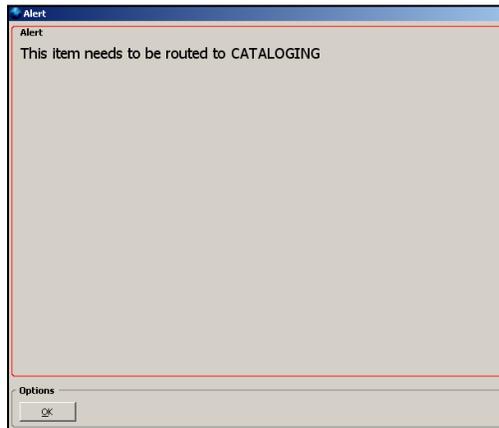


You, or other designated staff, can now either inform the patron the ILL item is available for pick-up, or send it to the patron's home library/branch before you or the staff there contact the patron.



Checking in ILL items with Pre-Cataloged records

At **Check In**, a dialog box will display to route to **Cataloging**:



The item will display on the **Check In** screen with a warning message at the top:

Check In or Process Item									
Check In		Enter Barcode: <input type="text"/>		Submit		Effective Date: 09/ 12/ 2012		Actions for Selected Items	
3109900001813 needs to be cataloged.						Fine Tally: \$0.00			
Alert Message	Barcode	Title	ISBN	Circulation Modifier	Balance Owed	Checkin Date	Location	Route To	
	3109900001813	Stars in my pockets like gra...	813.54 Delany	book	0.00	9/12/12 12:00 AM	Stacks	CATALOGING	

Rather than routing to cataloging, the item will need to be sent to you. You may want to make sure that circulation and cataloging staff can recognize returned ILL items so that they will be routed correctly to you for processing.

NOTE: The **Pre-Cat** record is not automatically deleted from the database at **Check In** and must be manually deleted. While not automatically deleted, it is no longer accessible, even for another checkout.

Reporting on Pre-Cat records.

Cataloging staff at your library should run regular reports to identify **Pre-Cat** items that have not been sent back to them for resolution. The reports will also allow them to monitor **Pre-Cats** for ILL items. If you have permissions to run reports, you may also run the report to ensure the records for ILL items are deleted. The template for the report can be found in **Quick Reports** (<https://gapines.org/report-creator/>) under **Items**.

Deleting Pre-Cat records.

Once you have received the ILL item back from the patron, you should send the barcode to cataloging staff to delete the record. These records can only be retrieved in **Item Status (F5)**. Catalogers will use the **Actions for Catalogers** menu to delete the item.