



MLS Resource Sharing
Reciprocal Borrowing
Procedures Manual
May 2008

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Reciprocal Borrowing

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Contacting the MLS Resource Sharing Office

Please feel free to contact staff at the MLS Resource Sharing office with any questions or concerns you may have regarding our service. Resource Sharing staff is available Monday - Friday 8:00 – 4:00.

The MLS Resource Sharing office can be contacted via

- Phone (630) 734-5160
- Fax (630) 734-5050
- Email metroill@mls.lib.il.us

The MLS ILL mail list address is mls-ill@mls.lib.il.us To subscribe, send an email to MLS-ILL-request@mls.lib.il.us with "subscribe" in the subject line of your message. Once you have subscribed, feel free to initiate and contribute to ILL discussions.

You can view our blog and subscribe to the RSS feed at <http://resourcesharingblog.mls.lib.il.us/>

For more information about MLS Resource Sharing visit our web site at:

http://www.mls.lib.il.us/resource_sharing/index.asp



“Your Public Library Card” Brochure

The MLS Resource Sharing Service publishes and supplies free of charge to the MLS suburban membership a brochure defining the three major services of Resource Sharing:

- Interlibrary Loan
- Reciprocal Borrowing
- Union List of Serials

Reflecting the demographic of our service area, the “Your Public Library Card” brochure is also available in Spanish, Polish, and Arabic. To request a supply for your library either call the MLS Resource Sharing office at (630) 734-5160 or request a supply online at:

http://www.mls.lib.il.us/resource_sharing/supply_request.asp

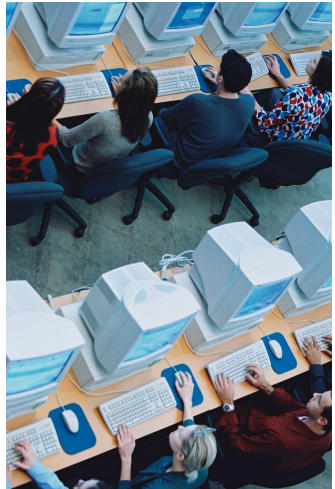
MLS Resource Sharing CE Opportunities

The Resource Sharing office usually sponsors one workshop or forum per month; please view the MLS Calendar for specifics at <http://www.mls.lib.il.us/calendar/index.cfm>. Resource Sharing Continuing Education events can be found by searching the title "Let's Talk Resource Sharing."

Resource Sharing workshops and hands on training sessions are usually free of charge. Library staff can register online for any of these events by using the CE Calendar.

Some previous topics have included:

- How to write an ILL Policy
- ILL Practices, Policies, and Procedures
- Reciprocal Borrowing
- WorldCat Resource Sharing
- Resource Sharing for School Libraries.
- SWAN ILL Statistics



Requesting a Site Visit

MLS Resource Sharing staff are available to visit your library for individualized training and/or consultation. Please use the form available on our website to schedule a visit at your convenience.

http://www.mls.lib.il.us/resource_sharing/site_visit_request.asp

MLS Reciprocal Access Policy

The MLS Reciprocal Access Policy defines the privileges and responsibilities of an MLS member library as related to interlibrary loan and reciprocal borrowing.

It is expected that each library will participate in reciprocal access as completely as possible within any organizational or legal limitations that may be necessary.

Please refer to the [MLS Reciprocal Access Policy](#), as approved by the MLS Board of Directors on March 19, 2007, for specifics.

http://www.mls.lib.il.us/resource_sharing/pdf/Reciprocal_Access_Policy_March_2007.pdf

To facilitate reciprocal access, MLS has created a Reciprocal Access Policy Directory which includes interlibrary loan, photocopy and reciprocal borrowing policies of the membership.

http://www.mls.lib.il.us/resource_sharing/ill/dl-search.asp

Search the Reciprocal Access Policy Directory for:

- [interlibrary loan policies](#)
- [photocopy policies](#)
- [reciprocal borrowing policies](#)



What is Reciprocal Borrowing?

Reciprocal Borrowing is a program that allows patrons with a valid public library card to borrow materials from another public library. **In Reciprocal Borrowing the patron travels to the material.** Reciprocal Borrowing among the regional library systems of Illinois is governed by the [Illinois Intersystem Reciprocal Borrowing Covenant](#).



What is Interlibrary Loan?

According to the American Library Association, Interlibrary Loan Code for the United States: *“An Interlibrary loan is the process by which a library requests material from, or supplies material to, another library.”* **In Interlibrary Loan the material travels to the patron.** For more information about what codes, policies, or standards apply to ILL activity please check

http://www.mls.lib.il.us/resource_sharing/loans.asp

Reciprocal Borrowing Overview

Reciprocal Borrowing support includes the debiting/crediting of libraries for Reciprocal Borrowing losses, transmitting delinquent Reciprocal Borrowing patrons to one of two collection agencies upon request of the member library, providing consulting support for Reciprocal Borrowing questions, visiting member libraries for individualized training, and presenting Continuing Education events on the topic for the membership on a regular basis.

Reciprocal Borrowing support for MLS suburban member libraries is coordinated by Edlyn LeFevour, MLS Reciprocal Borrowing Facilitator.

Edlyn can be contacted Monday—Friday 8:00 am — 4:00 pm via

- Phone (630) 734-5161
- Fax (630) 734-5050
- Email lefevoure@mls.lib.il.us



For more information about Reciprocal Borrowing, please visit our web site at

http://www.mls.lib.il.us/resource_sharing/reciprocal_borrowing.asp .

MLS Reciprocal Borrowing Program

All public libraries within MLS participate in Reciprocal Borrowing both within system (Intra-system) and with public library patrons holding valid cards from other Illinois library systems service areas (Inter-system). Some of the Academic members of MLS will circulate their materials to MLS reciprocal borrowers with a valid patron card, please search the [MLS Reciprocal Access Policy Directory](#) for particulars.

http://www.mls.lib.il.us/resource_sharing/ill/dl-search.asp




There are only two libraries in Illinet that do not participate in Intersystem Reciprocal Borrowing:

- **Park Ridge Public Library**
- **Skokie Public Library**


MLS libraries should not grant reciprocal borrowing privileges to patrons from these two libraries.

Debiting and Crediting for Reciprocal Borrowing Losses

On a quarterly basis, MLS Resource Sharing prepares reports for the MLS Finance Dept. to debit and credit libraries for RB losses. Debit reports are prepared billing the reciprocal borrower's home library when RB materials are between 5 and 7 months overdue.

 MLS Reciprocal Borrowing Loss Invoice	
(7060) Total for Library: \$204.95	
Patron Name: Patron's Address: Title of Item: Author: Barcode of Item: Due Date:	Owning Library: Bellwood PL Price of Item \$4.95

At the same time, credit reports are issued to the owning library for the billed items. The majority of this data is pulled from SWAN with the Non-SWAN MLS members supplying the MLS office with reports of delinquent Reciprocal Borrowing transactions. Resource Sharing also bills libraries outside of MLS

 MLS Credit for Reciprocal Borrowing Losses	
(7060) Total for Library: #####	
Title of Item: Lying: moral choice in public and private Author: Barcode of Item: 31 Due Date: Patron Record ID: 21 Patron Name: Bz Patron's Address: 59 Ct	Price of Item \$11.00
Title of Item: Ac Author: Barcode of Item: 31 Due Date:	Chicago Public Library

for their patron's reciprocal borrowing losses. This is performed on the same schedule as the in-system billing.

Reporting Reciprocal Borrowers to Collection

Every public library within MLS has the opportunity to use the services of MLS Resource Sharing to send their patrons with reciprocal borrowing delinquencies to collection. MLS reports delinquent Reciprocal Borrowing patrons with a minimum balance due of \$25.00 in bills (not fines) to collection when the materials are 60 days overdue.



At present, Resource Sharing offers our members two collection agency options:

- Transworld Systems Inc.
- Unique Management Systems Inc.

Please call the Resource Sharing office to discuss the important distinction between these two companies.

Both collection agencies charge \$10.00 per transmittal. This amount is added to the patron 's record when the patron data is transmitted for collection. Patrons are instructed to return their library materials and pay their fines at any MLS public library. If materials have been lost, the patrons are instructed to send a check to MLS. When MLS receives payment from the patron, MLS issues a credit to the appropriate library (based upon the status of the transaction in the debiting /crediting cycle). Non-SWAN libraries should call MLS to report payments by delinquent Reciprocal Borrowers.



SWAN Procedure

If the patron pays all fees and fines at a SWAN library, the SWAN library should take the money, clear the paid fines and fees, including the CA (Collection Agency) fee, but do not remove the "M" block. MLS will remove the "M" block when it completes all processing, including the debiting of library collecting monies when appropriate. SWAN libraries do not need to call MLS to notify them of payment. MLS will update the patron's status with the Collection Agency.

As a further service to our SWAN members, MLS Resource Sharing will upon request assist libraries in reporting their in-house delinquent patrons to Unique Management Services, Inc. On a daily basis delinquent patron data is pulled from SWAN and transmitted to Unique Management, Inc. There is no fee to the members for this service.

Reciprocal Borrowing Statistics

The MLS Resource Sharing Service collects and publishes Reciprocal Borrowing statistics on a monthly basis. Statistics for the majority of public libraries are compiled from reports generated off of the SWAN database. **All Non-SWAN public libraries and any MLS Academic members participating in Reciprocal Borrowing report their RB statistics to the Resource Sharing office on a monthly basis (by the 10th of the month).**



Non-SWAN Libraries Circulation to Reciprocal Borrowers

MLS Non-SWAN public libraries should circulate materials to MLS reciprocal borrowers holding a current public library card. When a patron visits a library for the first time, the patron's home library should be called to establish the status of the patron and the expiration date of his/her library card. The lending library should then enter the patron in their database or circulation system with the home library's expiration date.

For patrons from outside of MLS, follow the same procedure verifying the patron's status and expiration date of their card. **Chicago Public Library** patrons should have an MLS library card. If a card needs to be issued for a Chicago patron use the following guidelines:

- Check ID—patron should have either a state ID or driver's license and a Chicago Public Library card
- Have patron fill out a MLS patron card application
- Call CPL to verify patron's status (Phone: 312-747-4062) or verify online at http://www.chipublic.org/PatronStatus/index_01.jsp
- Identify yourself, your library, and why you are calling
- Supply CPL with D0# from Chicago patron card
- **If approved and your library issues cards**—create card and send completed application to MLS Resource Sharing with note. If you do not create cards, send completed application to MLS and tell patron they will receive their card through the mail in about two weeks
- **If not approved or online status is restricted** send patron back to CPL to update status



SWAN Procedure

SWAN Library Circ to Non-SWAN Reciprocal Borrowers

If patron is entered on SWAN with a current expiration date and in good standing, circulate to them using their card with their SWAN compatible barcode or 1140 SWAN barcode.

If patron is not entered on SWAN:

- Check ID, patron must have an ID with their current address and their home library card
- Have patron complete an application form
- Call patron's home library to verify status & expiration date
- Check on SWAN for old patron record by performing a name inquiry (type the letter *N*, then patron's *last name (space) first name* . For a complete patron card search, type *n first name (space) last name* **Example: nsmith mary**

If you found an old record for the patron:

- Check for old fines and/or overdues (these must be paid before you can re-register the patron)
- Collect and keep all old fines
- Any replacement fees for lost items at the patron's old home library, must be paid at that library (do not issue card-refer patron back to home library)
- Any fees or charges for Reciprocal Borrowing items can be collected at any SWAN library. **If patron pays any RB charges do not remove the "M" block.**

Edit Patron Record - p1581600x

Insert a non-MARC field

b P BARCODE

OK Cancel

EXP DATE	-	CUR CHKOUT	0	CUR ITEM	0
PCODE1	-	BIRTH DATE	- -	CUR ITEM	0
PCODE2	5 SLS TRAINING	HOME LIBR	bvs Bridgeview Public Lib	CUR ITEM	0
PCODE3	0 undefined	PMESSAGE	- NO MESSAGE	CUR ITEM	0
P TYPE	217 Non-SWAN RB	MBLOCK	n NON-SWAN BLOCK	PCODE4	0 Undefined
TOT CHKOUT	1	CL RTRND	0	CIRCRCTIVE	- -
TOT RENEWAL	1	MONEY OWED	\$35.00	Notice Preference	- NONE

PATRI NAME Bear, Brown

ADDRESS SLS Training Patron

INITID BR0VBSLS9

NOTE GNR0010@

P BARCODE 1943 00000 0568 Replaced card/2/20/08 kb/mls

To re-register patron bring up old patron record on SWAN:

- Click on Edit icon
- Click on Exp Date field and type in new date
- Click on PTYPE field and enter 217
- Type message: ‘Replaced card/date/initials” next to old barcode
- Click on insert a field
- Choose patron barcode (P Barcode) field
- Type or scan in the new number
- You may need to resort the patron barcodes in the record as **the current patron barcode should be displayed at the top**
 - Place cursor to the right of new patron barcode
 - Right click
 - Select “move to top of group”
- Click on “save” to save record.

Complete application paperwork by recording old and new barcode on form, fill in new expiration date, date and initial form, annotate form indicating home library was called—send completed application to the Metro Computer Room.



SWAN Procedure

New PATRON	Last Updated: 02-22-2008	Created: 02-22-2008	Revisions: 0
EXP DATE	-- --	CUR CHRGDT	0
PN	--	BIRTH DATE	-- --
PCODE2	f ON-THE-FLY	HOME LIBR	none
PCODE3	0 unde fined	PHESAGE	f ON THE FLY
P TYPE	0 Unde fined	YBLOCK	-
TOT CHRGDT	0	CL. RTROD	0
TOT RENGL	0	MOREY ORED	50.00
		Notice Preference	- NONE

▶ PATRN NAME
▶ NOTE
▶ P BARCODE

New PATRON Record Record Creation Mode

If you did not find an old record for the patron:

- Key or scan in new barcode (invalid patron barcode error message, “this is not a valid index’) a compatible 2 1140 patron barcode will need to be issued.
- Choose the “onthefly” template and click on select
- Enter Exp date from card or from information received when you called the home library
- Click on PTYPE field and enter 217
- Home library (skip)
- Patron name—type in last name, first name
 - Sometimes there is a patron with the same name as the one you are entering. If there is, a duplicate record will drop when you enter the name, verify if it is the patron standing in front of you. If it is not the same patron, just click on close and proceed

- Enter barcode
- Note field: type in name of library/ suburb **Example: Helen Plum Library/Lombard**
- Click on Save
- On the fly box drops, click on OK

Complete application paperwork:

- Record barcode number of home library, if issuing a 2 1140 number, attach the eye-readable label
- Fill in new expiration date
- Enter today's date, SWAN agency code, and your initials
- Annotate form indicating home library was called
- Send completed application to the Metro Computer Room

SWAN and Chicago Public Library Patrons

- Check ID—patron should have either a state ID or driver's license and a Chicago Public Library card
- Have patron fill out a MLS patron card application
- **Verify patron's status online at http://www.chipublic.org/PatronStatus/index_01.jsp by entering patron info into form**
- **If patron's status is restricted or expired** – send patron back to CPL. Do not check out material to the patron or issue a card.
-



SWAN Procedure

Chicago Public Library Patrons (cont'd)

- **If patron's status is good and your library does not issue cards**— complete bottom of application and include the CPL D0#, your agency code and initials, and date verified online. Enter an “on the fly” patron record. Send application to MLS Resource Sharing with a note patron verified. MLS will mail the patron a MLS card in about two weeks. Circulate items to patron using the newly created “on the fly” record.
- **If patron's status is good and your library issues cards**— create card using the “rbchi” template on SWAN. Be sure to include the CPL D0# in the alt id field and enter all the appropriate notes. For further instruction in making MLS Chicago RB cards, contact the Resource Sharing office at (630) 734-5161.

Chicago Public Library Patrons MLS Card Renewals

- Check ID—patron should have either a state ID or driver's license and a Chicago Public Library card
- Check SWAN for any delinquencies on the MLS card—these must be cleared before you can renew card. Call MLS Resource Sharing if you have any questions concerning a delinquency.
- **Verify patron's status online at http://www.chipublib.org/PatronStatus/index_01.jsp by entering patron info into form**

- **If patron's status is restricted or card is expired** – send patron back to CPL. Do not check out material to the patron or renew their MLS card.
- **If approved**– update patron record in SWAN with new one year expiration date. Put new expiration date sticker on MLS card. Update any other patron information as necessary.

If you library issues MLS system cards and the patron needs a new card, issue a card once approval has been received. Remember to re-reg the patron in SWAN. Be sure to include the DO# of the Chicago card in the alt id field and enter all appropriate notes.

If patron needs a new card created by MLS, give the patron a one month expiration date on the old card and change the expiration date in SWAN. Send the application to Metro Resource Sharing indicating “need new card.” Tell the patron a new card will be mailed to them in 2-3 weeks.

If patron just needs a renewal, and the CPL and MLS card are in good standing, issue the patron a new one year expiration sticker. Be sure to update the record in SWAN with new date.



SWAN Procedure

SWAN Reciprocal Borrower Emergency Patron MBLOCKS

If a SWAN Reciprocal Borrowing patron reports their SWAN patron card lost or stolen at another SWAN library—the library taking the report should attempt to contact the home library to request that the patron’s record be updated. If the patron’s home library is closed, staff should follow the emergency MBLOCK procedure and update the patron’s record on SWAN. Library staff should complete the “Reciprocal Borrowing Lost/Stolen Library Card Emergency MBLOCK” form, give a copy to the patron and fax a copy to the home library. Staff should complete the process by updating the MBLOCK field of the patron record with an “E” (RB Lost/Stolen). This is the only field of the SWAN patron record to be edited. Once the record is updated and the form is faxed to the home library, the patron is not responsible for any materials checked out in the future on the card. Patron should be instructed to follow up with his/her home library to have the MBLOCK removed and circulation privileges restored.

NON-SWAN Reciprocal Borrower Lost Card MBLOCKS

This procedure does not apply to anyone with a Ptype of 216 or 217—these are NON-SWAN Reciprocal borrowers. Upon notification by a Chicago library patron or Non-SWAN Reciprocal Borrower of the loss of their card, SWAN staff should change the MBLOCK to “L” (Lost) and put a message on the record as to which library updated card and the date of reported loss.

Notes