

Writing an ILL Policy Statement

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Why do I need a policy

- Required by State and National ILL Code
- In case your patron asks a question
- So you can save yourself some work by using deflections in OCLC
- So other libraries can view your policy

What is an ILL Policy

It is a plan written to meet the service goals of your library that addresses your role as both a borrower for your patrons and a lender to other institutions

Elements in a borrowing policy

- **Definition of ILL**
- **Define who can use the service**
 - Juveniles? Faculty? Staff? Reciprocal borrowers?
Delinquent patrons?
- **Define any limits**
 - Do you limit by format
 - Do you limit patrons to a number of requests per day or week
 - Do you limit the extent to which you pursue an item (in-state, out of state, Canada, International other than Canada)

Borrowing policy elements

- Do you charge your patrons for this service
 - Do you collect the fee at the time request is initiated or material received
 - Do you charge a different fee for journal articles and loans
 - Are fees standard (flat fee) or different for each transaction
- How do you notify a patron when materials are received
- Effective date of policy

Elements in a lending policy

- What types of requests (manner of transmission) do you accept
 - Phone calls
 - OCLC/ ILL only
 - ALA ILL forms
 - Email
- Remember all photocopy requests must be in writing or electronic forms indicating copyright compliance

Lending policy - elements

- What types or format of material do you lend
- What is the loan period, does it differ by format
- What about renewals
- Do you charge for loans, photocopies
- If you charge, who do you charge
 - Consortia members
 - ILLINET for copies only
 - LVIS

Lending library- elements

- Do you provide express service
 - Do you charge extra
- Do you charge different rates based on postage, UPS, or FedEx delivery
- Do you invoice libraries
 - Invoice with materials or separately
 - Only use OCLC IFM
 - Accept credit cards

Lending policy - elements

- **Delivery methods**
 - Do you use methods other than ILDS or USPS
 - Do you fax photocopy fills, use ARIEL, post fills to web
- **Contact information**
 - Library name, address, department
 - OCLC and/or NUC symbol
- **Lost book policy**

ILL Policy Directories

- ILLINET Resource Sharing Policy Directory
<http://www.librarylearning.info/rsdirectory/>
- OCLC ILL Policies Directory
<http://illpolicies.oclc.org>

ILLINET Resource Sharing Policy Directory

LIBRARY LEARNING

L2

You aren't signed in [Sign In](#) | [Register](#) | [Help](#)

Search

[Tags](#) | [New Events](#) | [More feeds](#) | [Libraries](#)

[Sign In](#)

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[View Event List](#)

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[Help & Support](#)

Libraries

Resource Sharing Directory Search

Search by...

Library Name:

or

OCLC symbol:

or

Specific barcode/zebra prefix:

or

Search by criteria (for example, all libraries that lend DVD-fiction or all libraries that supply free photocopies or libraries that restrict RB borrowing)

Photocopies

Loans (ILL)

Reciprocal Borrowing (RBP)

Library Policy Input Form

Indian Prairie Public Library District



[Upload your ILL Lending and Borrowing Policy documents here.](#) Suggested formats are pdf or Word doc.

Resource Sharing Update

Please update the resource sharing policies and procedures of your library. If you library has multiple buildings, please update this information for each building. This information should be reviewed at least annually and updated when changes occur.

ILL Phone & Fax Numbers

ILL Phone . . ext.

ILL Fax . . ext.

Loan Email

Photocopies Email

Reciprocal Access Contacts

Select the staff member who serves as the primary contact person for each area of resource sharing.

Loans (Borrowing)

Loans (Lending)

Photocopies

Reciprocal Borrowing

Photocopy policy area

Photocopy Policies

- yes no Does library provide free photocopies?
- yes no Does library provides Express Copy Service (24 hour turnaround)?
- yes no Do you need to call first for express service?
- yes no Do you provide free express service?
- yes no Does your library fill requests via fax?
- yes no Does your library fill requests via email?
- yes no Is your library an LVIS Member?

What is your exposure/page limit?

What is your charge for photocopies?

(e.g. first 30 pages free, \$.04 each page thereafter)

What is your charge for express service?

If library is an Ariel user, provide the following:

Ariel Address

Ariel Version ▼

ILL Policy

Loan Policies

yes no Does library participate in OCLC ILL?

yes no Does library use ILL management software?

If library uses ILL management software, please specify the software (e.g. Clio, ILLIAD, Relais)

Please enter your interlibrary loan policy for the following types of material by indicating yes, no, or not owned for each item category. If you own a particular category, but do not circulate the material on interlibrary loan, indicate "no". Enter specific notes about an item type, if additional explanation is useful.

Yes	No	Not Owned	Item Category
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Audiocassette - Music [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Audiocassette - Spoken Word [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Compact Disc - Music [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Compact Disc - Spoken Word [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Blu-ray - Fiction [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Blu-ray - Non-fiction [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	DVD - Fiction [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	DVD - Non-fiction [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	VHS - Fiction [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	VHS - Non-fiction [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Miscellaneous AV (8mm filmstrips, flashcards, slides,etc.) [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	MP3 [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Phonorecord (45, 78, or 33 1/3) [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Ebook [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Ebook Readers (Kindle) [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Preloaded Digital Media (Playaway) [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Cd-rom/Dvd-rom (Computer Software) [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Game (Board Games) [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Console Game (Playstation, Wii, etc.) [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Braille [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Large Type [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Mixed Media (Kits) [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Musical Score [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Microfilm [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Manuscript [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Map [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Toy [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Art (framed art, sculpture, etc.) [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Graphic (posters) [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Government Document [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Dissertations [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Back Issues of Periodicals [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Genealogy Materials [add notes]
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Reference Materials [add notes]

Lost Material Replacement Cost

(e.g.list price for item or standardized fee (\$100))

Replacement Processing/Service Charge (specific price, in addition to item replacement cost)

\$ (e.g. 8.00)

Reciprocal Borrowing policies

Reciprocal Borrowing Policies

Does library participate in reciprocal borrowing within your own library system?

Yes No

Does library participate in reciprocal borrowing outside of your library system?

Yes No

What is your barcode/zebra label prefix (4 digit #)?

2 or 3 (prefix) followed by

(e.g. 1234)

Does library place any restrictions on RBP patrons?

Yes No

What restrictions/limits are placed on reciprocal borrowers (by format, number of circulating materials, etc)?

Submit

Completed Policy

Libraries

Resource Sharing Directory
Woodridge Public Library
10000 N. 60th Street
10000 N. 60th Street, Woodridge, IL 60117-0000
ILDS Branch: Metropolitan Library System (MLS)
200-600-2000 - 200-600-2000 - 200-600-2000
Barcode/Cobra Label Prefix: 2324

ILL Phone & Fax Numbers
ILL Phone Number: 630-964-2900
ILL Fax Number: 630-964-4120
Loan Email: ill@wpld.org
Photocopy Email: wpld@wpld.org

Reciprocal Access Contacts

Loans (Borrowing)	Photocopies
Patricia White Patricia.White@woodridgelibrary.org 630-964-0175 (fax)	Patricia White Patricia.White@woodridgelibrary.org 630-964-0175 (fax)
Loans (Lending)	Reciprocal Borrowing
Patricia White Patricia.White@woodridgelibrary.org 630-964-0175 (fax) 630-964-0170 (fax)	Julie Lombardo Julie.Lombardo@woodridgelibrary.org 630-964-0175 (fax) 630-964-0170 (fax)
Loans (Lending)	Reciprocal Borrowing
Patricia White Patricia.White@woodridgelibrary.org 630-964-0175 (fax)	Julie Lombardo Julie.Lombardo@woodridgelibrary.org 630-964-0175 (fax)

Photocopy Policies
Policies are preceded by indicators: (Yes), (No), (Data Missing)

- Free photocopies?
- Express Copy Service (24 hour turnaround)?
- Call first for express service?
- Free express service?
- FR requests via fax?
- FR requests via email?
- LVED Member?
- Exposure/page limit: none
- Charge for photocopies: 0
- Free express service?
- FR requests via fax?
- FR requests via email?
- LVED Member?
- Exposure/page limit: none
- Charge for photocopies: 0
- Charge for express service: 0

Loan Policies

- Participates in OCLC R1P?
- Use ILL management software (CCL, ILLiad, Relias, etc.)?
- ILL management software: (Yes), (No), NA (Not owned in collection), (Data Missing)

Policies are preceded by indicators: (Yes), (No), NA (Not owned in collection), (Data Missing)

Loan Policies

- Participates in OCLC R1P?
- Use ILL management software (CCL, ILLiad, Relias, etc.)?
- ILL management software: (Yes), (No), NA (Not owned in collection), (Data Missing)

Media

Item Category	Audio/Visual - Music
NA	<input checked="" type="checkbox"/> Audiocassette - Spoken Word
NA	<input checked="" type="checkbox"/> Compact Disc - Music
NA	<input checked="" type="checkbox"/> Compact Disc - Spoken Word
NA	<input checked="" type="checkbox"/> Blu-ray - Fiction
NA	<input checked="" type="checkbox"/> Blu-ray - Non-fiction
NA	<input checked="" type="checkbox"/> DVD - Fiction
NA	<input checked="" type="checkbox"/> DVD - Non-fiction
NA	<input checked="" type="checkbox"/> VHS - Fiction
NA	<input checked="" type="checkbox"/> VHS - Non-fiction
NA	Miscellaneous AV (8mm filmstrips, flashcards, slides, etc.)
NA	<input checked="" type="checkbox"/> MP3
NA	<input checked="" type="checkbox"/> Phonorecord (45, 78, or 33 1/3)
NA	<input checked="" type="checkbox"/> Ebook
NA	<input checked="" type="checkbox"/> Ebook Reader (Kindle)
NA	<input checked="" type="checkbox"/> Preloaded Digital Media (Playaway)
NA	<input checked="" type="checkbox"/> Cd-rom/Dvd-rom (Computer Software)
NA	<input checked="" type="checkbox"/> Game (Board Games)
NA	<input checked="" type="checkbox"/> Console Game (Playstation, Wii, etc.)
NA	<input checked="" type="checkbox"/> Braille
NA	<input checked="" type="checkbox"/> Large Type
NA	<input checked="" type="checkbox"/> Mixed Media (Kits)
NA	<input checked="" type="checkbox"/> Musical Score
NA	<input checked="" type="checkbox"/> Microfilm
NA	<input checked="" type="checkbox"/> Manuscript
NA	<input checked="" type="checkbox"/> Map
NA	<input checked="" type="checkbox"/> Toy
NA	<input checked="" type="checkbox"/> Art (framed art, sculpture, etc.)
NA	<input checked="" type="checkbox"/> Graphic (posters)
NA	<input checked="" type="checkbox"/> Government Document
NA	<input checked="" type="checkbox"/> Dissertations
NA	<input checked="" type="checkbox"/> Back Issues of Periodicals
NA	<input checked="" type="checkbox"/> Genealogy Materials
NA	<input checked="" type="checkbox"/> Reference Materials

Loss Material Replacement Cost: cost of the item on SIMAX
Replacement Processing/Service Charge: \$5.00

Reciprocal Borrowing Policies

- Participate in reciprocal borrowing within your own library system?
- Participate in reciprocal borrowing outside of your library system?
- Place any restrictions on RBP stations?
- Limit on reciprocal borrowings

ILL Lending & Borrowing Policy Documents

- [InterLibrary Loan Policy](#)

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OCLC ILL Policies

Go to: <http://illpoliciesoclc.org>

POLICIES DIRECTORY

LEGAL INFORMATION

OCLC Policies Directory

Sign in

AUTHORIZATION
PASSWORD



Remember this Authorization & Password
(browser cookies must be enabled for this feature)

LOGON

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Click on “MY UNITS”



Welcome, PRSMILL!
You will be using the Policies Directory in Member-Editor mode.

Basic Search

Advanced Search

Unit Search

Search for

by

Institution Symbol

Institution or Unit Name

SEARCH

RESET

Group Search

Search for

by

Group Symbol

Group Name

SEARCH

RESET

QUICK TIP

A Unit Search searches the following:

- ◆ Unit ("inst") Symbol
- ◆ Institution Name
- ◆ Unit Name


A Group Search searches the following:

- ◆ Group Symbol
- ◆ Group Name

QUICK TIP

Wildcard characters (?, * and ^) expand your search results. See HELP for detailed information.

Click on library name for Quick View summary screen

POLICIES DIRECTOR  MY UNITS | SEARCH | HELP | EXIT

METROPOLITAN LIBR SYST (IED)

1 Unit Record found

NEW UNIT CHANGE SUPPLIER STATUS

Unit Summary

Unit Name	Location	OCLC Supplier
1. METROPOLITAN LIBR SYST - Interlibrary Loan Service (IED)	Burr Ridge / Illinois	Yes

NEW UNIT CHANGE SUPPLIER STATUS

Check Unit Information and Update by Clicking “Information”

METROPOLITAN LIBR SYST - Interlibrary Loan Service (IED)

SUMMARY

Unit Policies

Quick View | Information | Contacts | Schedule | Collections

Unit

General Information

Unit Name and Symbol	METROPOLITAN LIBR SYST - Interlibrary Loan Service (IED)
Shipping Address	Metropolitan Library System / 125 Tower Drive / Burr Ridge / Illinois / 60527
OCLC Supplier	Yes Change
Regional Service Provider	ILLINET
Show Directory Data To	All Authorized Libraries
Reciprocal Lender	Yes
International Lender	Yes
Library Type	Other
Group Affiliations	LQRS , LVIS , SILO
Additional Symbols	IBrS
Library Catalog	http://swan.mls.lib.il.us/

Lending Information

Request Methods Accepted	<i>Loans:</i> ALA , Email , Fax , Mail , OCLC ILL <i>Copies:</i> ALA , Email , Fax , Mail , OCLC ILL
Fees	<i>Loans:</i> 0.00 - 25.00 More... <i>Copies:</i> 0.00 - 5.00 More...
Periods	<i>Loan Period:</i> 4 week(s) , 3 week(s) <i>Renew Period:</i> 2 week(s)
Delivery Methods	<i>Loans:</i> Courier , Mail <i>Copies:</i> Email , Fax , Mail

QUICK TIP

Click the "[More...](#)" link for additional information about data in that field.

QUICK TIP

Click [Change](#) to access the form to request a temporary change to your OCLC ILL supplier status.

QUICK TIP

The "Show Directory Data To" option allows a choice of whether the library's policies will be shared with either OCLC members only or also to other authorized libraries.

Click on “Policies” tab to view copies/loans/deflections

Unit Policies

Copies | Loans | Deflections

NEW

Copy Policies Summary

Policy Name	Copy Methods	Fees	Request Methods Accepted	
1. Copy	Photocopy	5.00	Email , Fax , ALA , Mail , OCLC ILL (preferred)	DELETE
			Delivery: Fax Mail (default) Email	
			Billing: Invoice with Item OCLC IFM (preferred)	
2. Copy-LVIS libraries	Photocopy	no charge for <30 Pages	Email , Fax , ALA , OCLC ILL (preferred)	DELETE
			Delivery: Mail (default) Email Fax	
			Billing: Bills Not Issued	

NEW

Click on “New” to add new policy

After clicking on “New” create your new policy

POLICIES DIRECTORY MY UNITS | SEARCH | HELP | EXIT

METROPOLITAN LIBR SYST - Resource Sharing Service (IED)

Unit Policies

Copies | Loans | Deflections

NEXT →

Copy Policy - Details (Form 1 of 3)

Details

*** Policy Name**

Copy Methods

Any Collection

Collections There are currently no collections defined for this Unit.

Any Format

Formats Exclude

Service Suspended

Reason for Suspension

Request Methods Accepted

Request Methods Preferred

NEXT →

QUICK TIP

Required fields are indicated by a *.

Data entered in fields with a QV will be automatically carried over to the QuickView screen.

Complete appropriate fields and click Create when finished

POLICIES DIRECTORY MY UNITS | SEARCH | HELP | EXIT

METROPOLITAN LIBR SYST - Resource Sharing Service (IED)

Unit Policies

Copies | Loans | Deflections

CREATE

Copy Policy Review			EDIT
Details			EDIT
Policy Name	test		
Borrowers			EDIT
Borrowers	No specific borrowers have been indicated for this policy.		
Fees			EDIT
Currency	US Dollar		
Tax Included in Fee	No		
Billing	OCLC IFM		
Rush Supported	No		
Note			
Click here to add a note			

CREATE

QUICK TIP

OCLC ILL Fee Management (IFM) can help you reduce costs by tracking and paying ILL charges through your OCLC bill.

For more information on the OCLC ILL policies directory click the image below to view OCLC document



OCLC Policies Directory Quick Reference

Introduction

The OCLC Policies Directory is a Web-based source of lending and copying policies of libraries participating in WorldCat Resource Sharing.

This document provides you with a brief overview of the OCLC Policies Directory as well as a list of information you should bring to your workstation when preparing to enter your policies, contacts, and institution information into the Policies Directory.

You can access the OCLC Policies Directory (<http://illpolicies.oclc.org>). There is also a link to the


Browser Requirements

Internet Explorer: The Policies Directory supports versions 4 through 7.

Netscape: The Policies Directory supports versions 4 through 9.

Firefox: The Policies Directory supports versions 1 through 3.

If you are operating with an older version than those listed, please upgrade your browser.



These are just some of the things to consider as you write or update your ILL lending and borrowing policies.

Remember once you create your policies
share them with other libraries by
entering them in the

ILLINET Resource Sharing Policy Directory

<http://www.librarylearning.info/rsdirectory>

and OCLC ILL policies directory.

<http://illpolicies.oclc.org/>