

ILL Interest Group Meeting

March 2023 - Post-meeting notes

Please reach out to Karen (illde@delcolibraries.org) with your ILL contact person name and email addresses

ACCESS PA / SHAREIT

- **Participant record**- located it on STAFF DASHBOARD → ILL ADMIN → REQUEST MANAGER → LENDER → PARTICIPANT RECORD
Just scroll through and make sure the information is current. If you make changes don't forget to hit submit when finished.

*****Contact person/ email- under staff notices:** make sure in the lender emails section you have the box checked for new lending request and renewal request. This will alert you when you have a pending request or a renewal request- especially if Access is not being monitored on a regular basis.

- **Blocked lender list:** Make sure all of the DCL are in this list, which is attached to the email and also on the staff site
- **Lending information:** This is an area that may need some cleanup
 - Update/ look at least 1 to 2 times a year
 - Holiday list- closing/ vacation time when no one will be tending to Access

Things to pay special attention to:

- **Access PA paperwork**
 - Place paperwork in the front of the item, NOT the middle and NOT the back.
 - Please fold addresses facing out NOT in, preferably only fold in half or quarters if necessary.
 - Your attention to these details will make things move more smoothly when getting ready for shipping.
 - There is no need to reprint Access paperwork; we don't need duplicates.
 - Exception: Only reprint if the lending library sent the incorrect paperwork (Borrower's Full Request Page) this is the page with all the libraries listed, the item description, address of lender, and address of borrower. We don't want that.
 - **We just want the DELIVERY AND RETURN SHIPPING LABEL**
- Always check Sierra before Access PA for borrowing

- Please keep your request manager flowing. Follow up, and keep things moving through the process
- I find the **pick list** very helpful. If you are receiving multiple requests at a time, this is an easy way to have everything on one list while pulling from the shelves.
- **Please don't tape anything to borrowed materials.**

Tracking

If you need any tracking information contact me with the following information:

- Date item left your library
- Destination of material
- Access PA request number and or our DCL barcode number

UPS only provides tracking for 120 days, so like I mentioned above follow through on the request manager. Don't let anything wait too long.

****Also, the Power Academy on Power Library has Access PA training if you would like a refresher or if you want to give new staff the basics:**

- Go to the Librarians section of PowerLibrary: <https://powerlibrary.org/librarians/#.ZByCaXbMIuE>
- Ignore the left menu and look in the right margin for the sticker that says, "PA Library Staff Academy" and click it
- Use the magnifying icon search feature to search "interlibrary loan"
- Two trainings will show up in the results. One is basic and one is intermediate

OCLC REQUESTS / WORLDCAT

- As a rule- always check SIERRA first then Access PA and finally, when all else fails, WorldCat.
- Find the link for the OCLC request form on [the staff page](#). Here is the link:
<https://charlotte.delco.lib.pa.us/illb>
- Please remember to include your initials and the library's 2 letter abbreviation.
For example, KS @ DE
This lets me know where to send the item when it arrives and also who I would need to talk to in case I needed more information about the request.
- **OCLC renewals**
 - Contact me with the patron's name, and the title of the item they would like to renew. I will get back to you as soon as I hear back from the owning library.
 - If the patron will accept an earlier edition of the item please let me know that on the request form in the local prompt where you enter your initials. This will save time trying to contact the patron when the newest version is not available.
 - The "cited in" box on the OCLC request form is for the OCLC number. Please enter just the OCLC number, NOT **OCLC# 12345678**
- Please save the paperwork you generate for OCLC requests until you see that the request has been closed in the email we send out monthly with all the closed requests listed. This will help if we need to do any tracking.

- REMEMBER TO CHECK IN OCLC ITEMS BEFORE SHIPPING THEM BACK TO DE.

- **OCLC Invoices**

On occasion, I will reach out to you with an invoice request and W9 form.

- The Invoice should be on your library letterhead. Add any processing fees as well.

- Email that information to me as soon as possible

- Let me know when you receive payment from the borrowing library.

This way I can close out the request. I understand that is usually not your job at the library, but if you could ask whoever handles this to keep you in the loop so that you can let me know, I would appreciate it very much.

- Invoices from Other Libraries

- When your patron loses an item that was borrowed through OCLC, let me know and I will request an invoice from the owning library and get the ball rolling.

- Your library may have to pay this initially and add the cost to the patron record under fines.

Miscellaneous

- Routing Slips

- Please write "ACCESS" when the item is ACCESS PA, "OCLC" when it is OCLC

- Printing the slip for an OCLC item from a receipt printer is fine as well.

- Red routing slips are for courtesy returns.

- Please have staff pulling the hold lists contact me if your library can't provide or transfer something going to Fair Acres = FA for pick up.

- FUN FACT: When you see a request for FA, that's the ILL office requesting something for a library through OCLC. It's not a request by a resident of Fair Acres. 😊

As always, I am happy to assist you in any way I can. I am available to visit your library for one on one training.