

Rochester City School Library System

Interlibrary Loan

Documentation

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ILL Librarian Expectations

Responsibility of Interlibrary Loan

Participation in interlibrary loan programs is a privilege granted through the establishment of School Library Systems in New York State. In requesting books through an interlibrary loan, the requesting library assumes responsibility for any lost or damaged books. The requesting library will be expected to replace or pay for the lost book or may risk losing interlibrary loan privileges.

The School Library System guarantees the return of the book borrowed from the loaning library outside the District, or replacement if the book is lost. However, the requesting library will work with the SLS Office to compensate for the lost book if the library patron has lost the book. If books borrowed from outside the District are lost in transit, and correct procedures have been followed, the SLS Director will replace the book or a substitute title. (The same Lost books policy is followed for books borrowed through FiveSystems).

Timeliness of response to requests

Librarians must check ILL Requests in LS2 Staff at least once daily when the librarian is on site. Librarians should respond to each request ASAP by filling the hold or marking books as missing.

In rare cases, you may find yourself needing to decline a hold. This should only happen in extenuating circumstances. Directions on this process can be found below.

The School Library System Office will monitor the timeliness of responses to interlibrary loan requests. Failure to respond regularly may result in the denial of further interlibrary loan privileges.

Suggested loan period

The suggested loan period for ILL books is 28 days.

ILL Glossary

Below is the agreed-upon language for the purpose of this documentation.

- Books = Materials, Items
- Requesting Library = Borrowing library
- Loaning Library = Owning library
- Patron = Student, Staff, Borrower

ILL Database Sources

Locate and request Interlibrary Loan books by using the following databases.

Note: RCSD Librarians should utilize the SLS Catalog and SLS textbook catalog first.

1. **SLS Catalog via LS2 Staff**

- a. Holdings of Rochester School Library System Libraries
- b. Members include RCSD libraries, Aquinas High School, and Nazareth Elementary.
- c. Access via ROConnect or your Direct Link

2. **SLS Textbook Catalog via Destiny Resource Manager**

- a. Textbook collections and classroom sets of literature in RCSD Libraries.
- b. Members include RCSD libraries.
- c. Access via ROConnect

3. **FiveSystems**

- a. The union catalog for the school library systems of the greater Rochester area.
- b. Members include CSD, Monroe BOCES 1, Monroe BOCES 2, Genesee Valley, and Wayne Finger Lakes.
- c. Access at <http://fivesystems.org/>

ILL Guides

ILL Processes with LS2 Staff

Settings



Item level holds- Turned OFF for everyone. This is the feature that allows patrons to select a specific copy rather than just the title. Turning on this feature would mean a librarian would need to scan the specific book with the selected barcode.

Title Level holds- Turned ON by preference of site librarian. That will allow a hold / ILL to be filled by any copy of the title you pull from the shelves.

PAC settings (Some of these options are customizable by site, let the SLS office know if you would like something changed.)

LS2Pac- Students and staff may make holds in LS2PAC

Holds may be made across the district

Patrons may not select delivery location

Must be logged in to make holds

LS2Kids- Holds turned off for LS2 Kids

LS2 Staff Glossary

In transit- Book has been requested for ILL and is / will be on the move

Holds shelf- Virtual shelf that mimics holds shelf behind your desk

Pickup location- Location where the book is to be sent

First available- System will pick least used copy in the system first. If declined, then goes on to the next school that owns a copy.

Arrived- This means the hold has been checked in by the requesting librarian and is ready for pickup.

Note- If you see this status before the book actually arrived at your school, that means the loaning librarian forgot to scan it in fill messages and mistakenly checked it out the person.

Location-specific- Must pick the school you want the copy from. If declined, then you must create a new hold request. It will not automatically be passed on to the next location.

Item specific- Suggest not using as it will just add extra work for the loaning librarian

Multiple copies- Use this for requesting class sets. The system will forward on to the next school if declined. Make sure you have checked Resource Manager first to make sure we do not have sets in the district.

Video Guides for ILL

Some video guides for utilizing LS2 Staff for ILL can be found here:

Google Drive > School Library System > TLC Library Solutions > Screencasts.

A direct link can be found here:

https://drive.google.com/file/d/1sQdaUpwwikQ46pMD96j5jeOJDZifL0iw/view?usp=share_link

General ILL Workflow with LS2 Staff

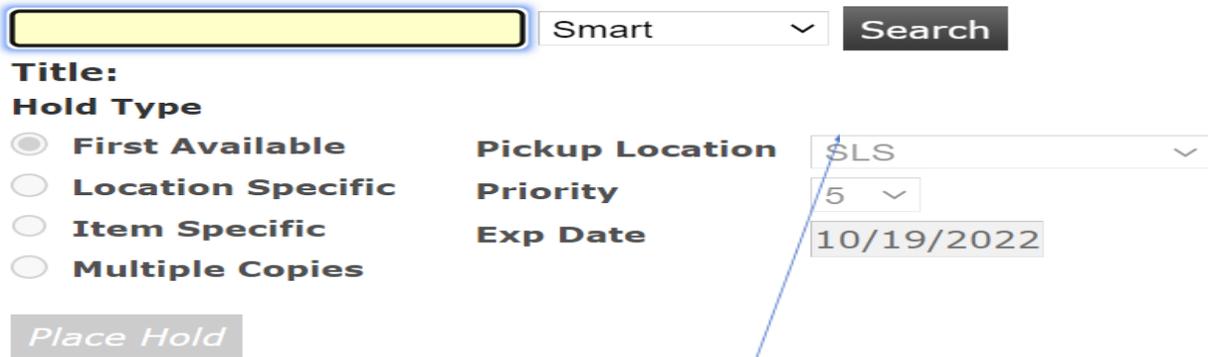
Making a Hold Request in LS2 Staff: Suggested workflow

1. The *requesting* librarian makes a hold request.

- a. In Borrower Services, find the patron.
- b. Select the Holds Button.



- c. Fill out holds information



- i. Note: Pick-up location should always be requesting school.

2. The *loaning* librarian selects and preps books for delivery.

- a. Open the Messages section of LS2 Staff

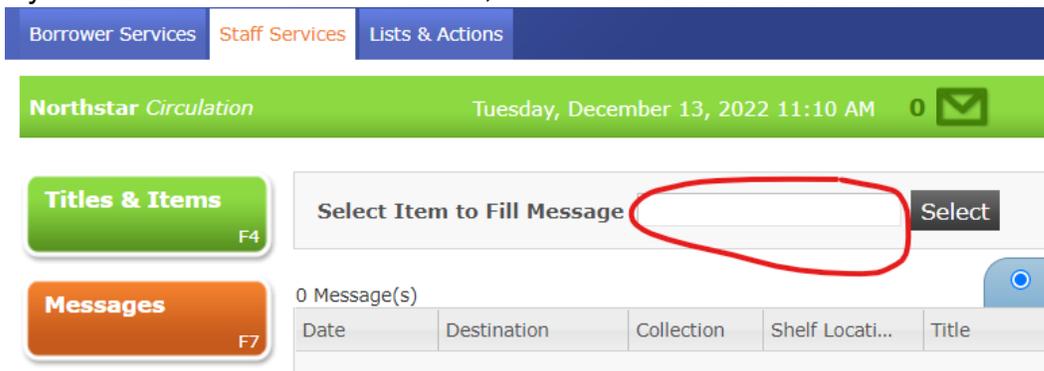


- b. Note titles to be pulled. It is important to write down or print each request PRIOR to scanning, as scanning will delete the message.

NOTE: If you forget, you will need to Go to Staff Services > Title & Items and scan the title to view who reserved the book.

- c. Look for Books on the shelf. See below for processes on what to do when the book is found and what to do if it is missing.

- i. If you find the book on the shelves, scan it into the 'Select Item to Fill Message' box.



- ii. If you cannot find the book, mark it as missing by highlighting the book and pressing the Mark Missing button.



Important Note- Deleting the ILL/hold message does NOT delete the hold. You must mark it as missing or follow the below directions on declining a hold.

- d. Package and label the book using [labels in the appendix](#). Please write clearly!
e. Give the package to the courier.

3. The *Requesting* librarian receives the book.

- a. Check with the office to receive the book.
b. Scan the book into CHECK IN to see who it goes to. This will move it to the hold shelf in staff services. It will also send an email to the patron letting them know the book is ready.
[note: The hold shelf is a virtual shelf mimicking the hold shelf typically kept behind your circulation desk.]



- c. When the patron comes in for the book, check it out to them as you normally circulate books.



Important Note: Be sure to let the patron know this is an ILL book and it must be returned.

4. The book is Returned to *requesting* librarian

- a. Check in the book. A note will appear indicating which library the book should be sent to. The status will be changed to *in transit* to loaning school.



- b. The requesting librarian packs up the book and gives it to the courier.

5. The book is received by a loaning librarian.

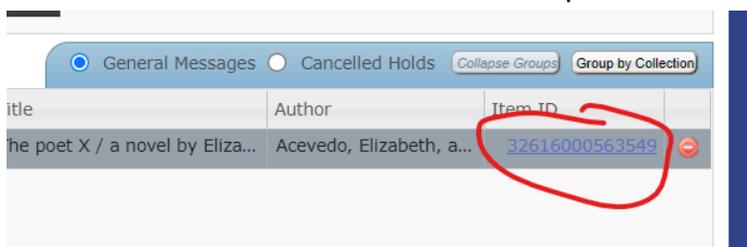
- a. The loaning librarian scans the book into CHECK IN. The status is now available.



Declining ILL Holds with LS2 Staff

Important Note: Librarians should strive to meet all ILL requests. Declining holds should only be done at the last resort. Good reasons to decline a hold would be if the book is still being cataloged or processed or your access to the library is limited for some reason or a specific patron is waiting for the book. Saving the book for your general student population isn't a good reason to decline a hold.

1. **Loaning** Librarian emails the **Requesting** librarian indicating they cannot fill the hold ASAP. Be sure to provide the title of the book.
2. The following steps are to be completed by the **Requesting** librarian ONLY.
 - a. Click the Item ID/barcode of the item requested.



- b. On the right-hand side it says "Transit Details fill hold for" with a patron 890 #. Click on the 890 # and go into the patron record.



- c. Click on holds



- d. Delete the hold. NOTE: Never delete a hold for a student not at your school.



3. **Requesting** Librarian, re-requests the hold. When doing so, please be sure to request from a specific location. If you place a hold and let the system select a location, TLC will select the title that has the least activity in the district.

ILL Processes with Textbook Catalog

There are two types of ILL materials in the Textbook Catalog in Destiny Resource Manager.

1. Guided Reading Materials
2. Textbooks (including textbooks and classroom novel sets)

Requesting Guided Reading Materials

1. The *Requesting* librarian checks the Resource Manager catalog.

- a. Search for Guided Reading materials.

Be sure to select Catalog and Resource View. Also be sure to select Find all.

The screenshot shows the top navigation bar of the Destiny Resource Manager. The 'Catalog' link is circled in red. The 'Resource View' dropdown menu is also circled in red. Below the navigation bar, the 'Search for Resources and Items' section is visible. The 'Find all' dropdown menu is circled in red and set to 'Textbooks'. There are also checkboxes for 'Include Teachers' Editions' and 'Include Resource Kits', and a 'Search' button.

- b. Locate the owning library by selecting the 'Items' tab on the resource record.

The screenshot shows the 'Resource Details' page for 'America Pathways to the Present - Guided Reading and Review'. The 'Items' tab is circled in red. Below the title, there are sections for 'Items at Hart Street Campus', '"On Order" Items', and 'Off-site Items'. The 'Off-site Items' section contains a table with the following data:

Site	Available Items	
Edison Campus 70	1 of 2 available	Show More ▼
Franklin Educational Campus 62	1 of 2 available	Show More ▼
Monroe High School 66	1 of 1 available	Show More ▼

- c. Send an email to the Owning librarian requesting the titles.

Requesting Textbooks and Classroom Novel Sets

1. The *Requesting* librarian takes a request from the patron.

- a. Email RCSD Textbook Coordinator, Vicki Griffin (Vicki.Griffin@rcsdk12.org) with the request.
- b. Vicki Griffin will locate the books and send them via courier.

2. *Requesting* librarian receives requested books.

- a. Requesting librarian checks with the office to receive the delivery.
- b. Requesting librarian opens Resource manager (ROConnect>Business & Professional>Resource Manager)



Continued below....

- c. Requesting librarian opens cataloging>Transfer Resources.
See the below screenshot.

The screenshot shows the library system's navigation menu with 'Catalog' highlighted. The 'View All' dropdown is also highlighted. The main area displays a table of incoming transfers with columns for From, Transfer Date, Order #, and Status.

From	Transfer Date	Order #	Status
DC (ernestpavone)	12/14/2021 2:10 PM		0 of 30 Received
DC (ernestpavone)	12/14/2021 2:23 PM		0 of 30 Received
DC (ernestpavone)	12/15/2021 9:28 AM		0 of 1 Received
DC (ernestpavone)	12/15/2021 9:34 AM		0 of 1 Received
DC (ernestpavone)	1/12/2022 2:43 PM		0 of 30 Received
DC (ernestpavone)	1/12/2022 2:45 PM		0 of 30 Received
DC (ernestpavone)	1/24/2022 12:54 PM		0 of 30 Received
DC (ernestpavone)	1/24/2022 12:57 PM		0 of 30 Received
DC (ernestpavone)	3/1/2022 12:43 PM		0 of 30 Received
DC (ernestpavone)	3/1/2022 12:44 PM		0 of 1 Received

- d. From this screen, find the items to receive and click the 'eye' icon.



- e. Press the 'receive' button to begin the receiving process.



- i. Receiving with barcodes: If items are barcoded, please scan each book in this field.

Scan or enter items one-at-a-time

Or receive selected items below...

Items Sent With Barcodes (3)

Textbook Title	ISBN
The Hate U Give	978-0-06-249853-3

Continued below...

- ii. Receiving without barcodes: Some materials may not have barcodes assigned. This window will pop up if they are sent without barcodes.

Description The poet X

Total Items 5

Items to Receive

Barcodes

Assign Barcodes Starting barcode [?](#)

Assign next barcode [Next: 4RCSD000011654]

Print labels

Important Note: Only barcodes starting with 4RCSD will allow for adding multiple barcodes at once. The old ones (XRCSD) will NOT work to add multiple at a time.

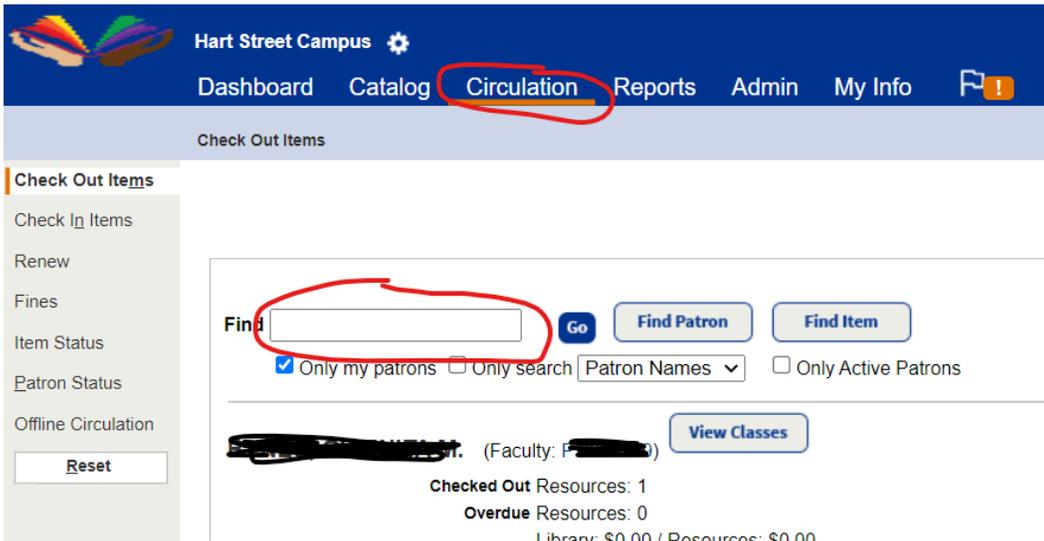
Note: If you need more barcodes, speak with Vicki Griffin.

3. Requesting librarian checks out materials.

- a. Requesting librarian opens Resource manager (RoConnect>Business & Professional>Resource Manager)



- b. Navigate to the 'Circulation' tab and find the patron.



- c. Once the patron has been found, scan the books to check out.

Five Systems ILL

The School Library System has an agreement for interlibrary loan with the other School Library Systems in the Rochester region – Member systems are Genesee Valley, Monroe I, Monroe II, and Wayne-Finger Lakes. Librarians are able to contact loaning libraries directly through www.fivesystems.org.

Patrons from outside the School Library System

If a school outside the system is not listed in the LS2, contact the School Library System Director, who will set up the school as a borrower. NEVER add ILL patron to LS2 yourself. You must contact the SLS TOA and have them add the school/patron.

Requesting ILL via FiveSystems

1. Navigate to FiveSystems Website

- a. Go to <http://www.fivesystems.org/>

2. Log In

- a. USERNAME: firstname.lastname
- b. PASSWORD: RSLs#(Schoolcode) (ex. RSLs#20)

3. Search the Catalog

- a. Enter a keyword and click Go.
- b. For more options, click the buttons to add a title, author, or subject search field.
- c. By default, the catalog searches all libraries; use the drop down menu to narrow the scope to a district or school in your system, or one of the other systems.
- d. Search results can be sorted or narrowed using the sort options and facets in the left sidebar.

4. Select an Item

- a. Choose an item and click the button Request this or click the item title and choose a specific edition.

5. Fill out the Request form

- a. **Borrower Note:** A note to yourself that can be used to remember who requested the book or what class it is for - this note is private and the lending library will not see it.
- b. **Lender Note:** A note to the lender that you can use to qualify your request or add additional information.

Receiving and Filling FiveSystems ILL Requests

1. Check Requests

- a. Requests are sent to district emails. Answer and fill the request promptly. The email link will lead directly to the request on the website.

2. Respond to Requests

- a. The lending library can request more information by leaving as pending and adding a comment.
- b. The requesting library will get an email letting them know if an item is accepted or declined.
- c. If you are able to send the item, reply to the librarian to ask them to confirm when s/he receives the item(s).
- d. At any point, either user can add comments to the request, which will generate an email to the other user and keep a record of the communication.

3. Check Out Items

- a. **Remember!** Do not add ILL Patrons to LS2. Contact the Library Director, sending them the requesting library's information, and ask them to add the Patron.

4. Send Items to RPL

- a. Print a copy of the ILL request and add the due date (28 day loan period suggested). Insert in book as due date reminder.
- b. When sending and returning ILL materials, use the mailing labels provided by the School Library System Office.
 - i. [See Appendix for shipping labels.](#)
- c. Place item for courier pickup.
- d. Document transaction with Tracking sheet.
 - i. [See Appendix for tracking sheet.](#)

ILL Delivery Information

Inter RCSD Courier

Purpose: Sending envelopes or very small boxes of books to other schools.

Note: Avoid sending large boxes of books through the courier. Boxes considered too large by the courier will be left for pick-up by the Service Center trucks, and have become lost in the District.

1. Place books in an envelope.
2. Place a courier label sheet ([See Appendices](#)) on packages being sent via courier. Clearly enter the receiving school number/name.
3. Cross out any previous addresses on the package.
4. Place the envelope in the office where inter-district mail is picked up.
5. If you think that books that were requested/sent have not arrived as anticipated, please contact the mailroom. head of the mailroom. They are available from 7:00 – 3:30 Monday – Friday.
 - a. Joe Sansone 262-8520
 - b. Michelle Court 262-8503

Cartage Orders

Purpose: Cartage orders have two purposes, sending larger boxes to schools and tracking the delivery of items. A Cartage Order requires each person handling the package to provide a signature. This provides a tracking system in case boxes go missing.

1. Place books in the box and secure the box with tape.
2. Fill out and attach the shipping label ([See Appendices](#))
3. Contact your school custodian, and let them know you have a cartage order to be picked up.
4. Contact the Distribution Center to schedule a pickup: DistributionCenter@rcsdk12.org. Include the following information.
 - a. Pick-up location
 - b. Pick-up contact
 - c. Delivery location
 - d. Delivery recipient
 - e. Item description
 - f. Quantity of boxes and/or pallets
 - g. Pertinent information regarding timelines and special details
5. Make sure the box is delivered to the dock area.

Courier between Non-Public Schools

Purpose: Sending materials to Non-RCSD schools.

1. Librarian puts the school name and FULL mailing address on the envelope and puts it in the courier. ([See Appendices](#))
2. The envelope goes to the Distribution Center and gets sent to one of the two schools.
3. When ready to return, requesting librarian emails the RCSD Distribution Center at to DistributionCenter@rcsdk12.org. Be sure to include the following information.
 - a. Pick-up location
 - b. Pick-up contact
 - c. Delivery location
 - d. Delivery recipient
 - e. Item description
 - f. Quantity of boxes and/or pallets
 - g. Pertinent information regarding timelines and special details
4. The courier picks it up and takes it to the Distribution Center.
5. The Distribution Center returns it to the loaning school.

Note: Allow 6-7 school days for delivery of books between RCSD buildings and non-public schools and schools outside the Library System.

ILL Cheat Sheet and Best Practices

<p>Prepare your library for ILL</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Designate an area for ILL supplies <input type="checkbox"/> Collect supplies <ul style="list-style-type: none"> <input type="checkbox"/> Envelopes <input type="checkbox"/> Black markers <input type="checkbox"/> Shipping labels <input type="checkbox"/> Prepared interlibrary loan slips <input type="checkbox"/> Updated Librarian roster <input type="checkbox"/> Packaging Tape <input type="checkbox"/> Log: Keep a record book of ILL requests and loans for reference. <input type="checkbox"/> Send a note to staff about how to use interlibrary loan services.
<p>Fill requests</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Check the LS2 Staff Message button each morning and each afternoon. <input type="checkbox"/> If sending several books, use several envelopes instead of a box. <input type="checkbox"/> Deliver envelopes to your school courier within 24 hours. <input type="checkbox"/> Accepting/Denying Requests: It is expected that librarians accept and fill ILL requests. Only in extenuating circumstances should a request be denied. <input type="checkbox"/> Be sure that all loaned books are clearly stamped with your school name and number. <input type="checkbox"/> Colleen Sadowski can turn off ILL if a library is closed or a librarian is out for an extended period.
<p>Other Tips</p>	<ul style="list-style-type: none"> <input type="checkbox"/> January and February are research months for RCSD. Be prepared to process a higher volume of ILL requests around this time. <input type="checkbox"/>

Appendices

The below documents represent the minimum information that should be shared with each form. Feel free to customize these documents, but make sure at least the same information is collected and displayed.

SLS Non-RCSD ILL Shipping Label

**Not for FiveSystems*

**Non-RCSD
Inter Library Loan
Shipping Label**

School Name: _____

School Mailing Address:

*Note to school:
Please deliver to the building Librarian.*

**Non-RCSD
Inter Library Loan
Shipping Label**

School Name: _____

School Mailing Address:

*Note to school:
Please deliver to the building Librarian.*

**Non-RCSD
Inter Library Loan
Shipping Label**

School Name: _____

School Mailing Address:

*Note to school:
Please deliver to the building Librarian.*

**Non-RCSD
Inter Library Loan
Shipping Label**

School Name: _____

School Mailing Address:

*Note to school:
Please deliver to the building Librarian.*

SLS ILL Patron & Date Due label

<p style="text-align: center;">SLS Inter-Library Loan</p> <p>This book, (title) _____,</p> <p>belongs to school: _____.</p> <p>Note to Patron: Please return this book to <u>your</u> library by _____. *If you would like to renew, please contact your librarian.</p> <p><i>Note to Librarian: Please remember to <u>first</u> check this item in before checking out to the patron.</i></p>	<p style="text-align: center;">SLS Inter-Library Loan</p> <p>This book, (title) _____,</p> <p>belongs to school: _____.</p> <p>Note to Patron: Please return this book to <u>your</u> library by _____. *If you would like to renew, please contact your librarian.</p> <p><i>Note to Librarian: Please remember to <u>first</u> check this item in before checking out to the patron.</i></p>
<p style="text-align: center;">SLS Inter-Library Loan</p> <p>This book, (title) _____,</p> <p>belongs to school: _____.</p> <p>Note to Patron: Please return this book to <u>your</u> library by _____. *If you would like to renew, please contact your librarian.</p> <p><i>Note to Librarian: Please remember to <u>first</u> check this item in before checking out to the patron.</i></p>	<p style="text-align: center;">SLS Inter-Library Loan</p> <p>This book, (title) _____,</p> <p>belongs to school: _____.</p> <p>Note to Patron: Please return this book to <u>your</u> library by _____. *If you would like to renew, please contact your librarian.</p> <p><i>Note to Librarian: Please remember to <u>first</u> check this item in before checking out to the patron.</i></p>
<p style="text-align: center;">SLS Inter-Library Loan</p> <p>This book, (title) _____,</p> <p>belongs to school: _____.</p> <p>Note to Patron: Please return this book to <u>your</u> library by _____. *If you would like to renew, please contact your librarian.</p> <p><i>Note to Librarian: Please remember to <u>first</u> check this item in before checking out to the patron.</i></p>	<p style="text-align: center;">SLS Inter-Library Loan</p> <p>This book, (title) _____,</p> <p>belongs to school: _____.</p> <p>Note to Patron: Please return this book to <u>your</u> library by _____. *If you would like to renew, please contact your librarian.</p> <p><i>Note to Librarian: Please remember to <u>first</u> check this item in before checking out to the patron.</i></p>

SLS ILL RCSD Shipping Label

Ship To: RCSD Library At School #			
Ship To: RCSD Library At School #			
Ship To: RCSD Library At School #			
Ship To: RCSD Library At School #			
Ship To: RCSD Library At School #			
Ship To: RCSD Library At School #			
Ship To: RCSD Library At School #			

Ship To:

School: _____

Attn: _____

Room: _____

Description of contents

Box _____ of _____

FiveSystems ILL Courier Envelope Label

<p>Deliver via RCSD courier mail:</p> <p>To: Rochester Public Library Rundel Mailroom</p> <p>Forward to: <i>(circle one)</i></p> <p>M1 M2 GV WFL</p> <p>District _____</p> <p>School _____</p>	<p>Deliver via RCSD courier mail:</p> <p>To: Rochester Public Library Rundel Mailroom</p> <p>Forward to: <i>(circle one)</i></p> <p>M1 M2 GV WFL</p> <p>District _____</p> <p>School _____</p>
<p>Deliver via RCSD courier mail:</p> <p>To: Rochester Public Library Rundel Mailroom</p> <p>Forward to: <i>(circle one)</i></p> <p>M1 M2 GV WFL</p> <p>District _____</p> <p>School _____</p>	<p>Deliver via RCSD courier mail:</p> <p>To: Rochester Public Library Rundel Mailroom</p> <p>Forward to: <i>(circle one)</i></p> <p>M1 M2 GV WFL</p> <p>District _____</p> <p>School _____</p>

