



E-ZBorrow Policies

These policies document PALCI Members' agreed-upon standards to ensure the efficient and effective operation of the E-ZBorrow system for sharing our circulating collections. These policies are reviewed and revised as needed by the E-ZBorrow Advisory Council and PALCI Members every two years.

Libraries participating in the E-ZBorrow (EZB) system will make available for loan as much of their collections as possible. Officially, E-ZBorrow transactions are between the Lending and Borrowing Libraries even though library users directly request books from other libraries via the E-ZBorrow system. There are no charges for processing transactions through E-ZBorrow.

All E-ZBorrow libraries will keep their contact, billing, staff, and policies information up-to-date in the E-ZBorrow wiki located at <http://ezborrow.pbworks.com/>

Responsibilities of the Lending Library

1. Requests

E-ZBorrow Libraries will give priority to requests and provide the fastest service possible. Requests will be printed off at least once a day Monday through Friday (when the library is open). Since requests remain in the Lending Library's print queue indefinitely until they are printed, it is important that EZB Libraries have adequate staff devoted to ensuring E-ZBorrow requests are printed in a timely manner. Once the request is printed, the library will respond within three days.

Timeline for lending materials:

- EZB Libraries will check the request queue *at least* once a day, Monday – Friday.
- Materials will be shipped in 24-48 hours from receipt of the request. 24 hours is preferred.

The PALCI E-ZBorrow band will be printed on pale blue paper. All information necessary for request processing is printed on the band. The barcode font needed to print the bands is available on the PALCI E-ZBorrow website in the Members' Section.

2. Multiple Volumes

Process all volumes under one request number:

- Scan or enter barcode of first volume
- Click the multi-volume button to add the additional barcodes
- Enter barcode of next volume(s)
- Click “submit” when final barcode of the set is entered

When multiple volumes are processed correctly, the Borrowing Library will be able to process the multi-volume set in the same manner – on the receiving end. For shipping, bundle volumes together so the Borrowing Library is aware these are one set.

3. Response time

Lending Libraries will fill requests or, if unable to supply, mark them unfilled, preferably within 24 hours, but no later than 48 hours from receipt of the request. If the requested material is not available because it cannot be located or is damaged, it should also be marked with the appropriate status, i.e., missing, in the local ILS so no more requests for that material are received.

4. Checking out materials in the local ILS

The preferred method of checking out materials to E-ZBorrow Libraries is to set up a user account for each library in the local ILS. Items will be checked out for a minimum of 16 weeks to avoid unnecessary overdue issues between libraries. This allows for a 12 week loan period and time for shipping and returning. System generated overdue notices will be configured for 20 weeks from the check-out date.

5. Recalls

E-ZBorrow materials will not be recalled except if needed for course reserves. When this happens, the primary contact for the Lending Library will send an email to the Borrowing Library requesting the book be returned as soon as possible.

6. Overdue material and replacement charges

E-ZBorrow Libraries will handle overdue or lost materials promptly. EZB Libraries will abide by the U.S. ILL Code and PA ILL Guidelines, which state the Borrowing Library is responsible for material from when an item is shipped from the Lending Library until it is returned to the Lending Library.

All communication about overdue material and replacement charges will be between the Borrowing and Lending Libraries ONLY. The Lending Library will not contact the Borrowing Library’s patrons. The Lending Library will email the Borrowing Library when the material is 4 weeks overdue, which is 20 weeks after the check-out date, and will invoice no earlier than 24 weeks after the check-out date.

Bills for lost materials will be sent within a year of the Lending Library’s check-out date. The replacement charge is determined by the Lending Library. When invoicing a library, the Lending Library will mention if a replacement copy of the material is acceptable in lieu of check payment and if any restrictions apply.

For tracking purposes, the Lending Library will indicate in the request record's note field when an overdue notice and invoice is sent. This will allow for an easy reference point for both libraries. The Borrowing Library will add the date to the note field the invoice is sent to their business office for payment. Lastly, the Lending Library will add the date the payment is received to the note field. Payments may take a few months to process.

7. Shipping

Lending Libraries may choose the method by which materials are shipped; however, the IDS discount program with UPS is the EZB preferred shipping method. Materials are picked up by UPS or another shipping company within one day of the request being marked shipped. If a library receives an item that was sent in error, it should be forwarded to the Borrowing Library rather than sending it back to the Lending Library. When shipping, use new or gently used boxes or padded mailers with bubble wrap inside (used no more than 2 or 3 times and with no visible holes) and do not overfill them. Refrain from using excessive tape or staples. Do not use jiffy bags with shredded material inside as these may create an environmental hazard.

Responsibilities of the Borrowing Library

E-ZBorrow Libraries agree to abide by generally accepted interlibrary loan guidelines.

The Interlibrary Loan Code for the United States outline the responsibility of the Borrowing Library:

Section 4.9: "...the requesting library is responsible for the material from the time it leaves the supplying library until its safe return to the supplying library."

Section 4.10: "...a final decision regarding replacement, repair, or compensation rests with the supplying library"

Section 5.12 of the Pennsylvania Interlibrary Loan Guidelines reinforces this obligation:

"The safety of borrowed materials is the responsibility of the requesting library. Ultimate financial responsibility for replacement or compensation for materials resides with the requesting library. The requesting library is responsible for borrow materials from the time the leave the supplying library until they have been received back by the supplying library"

The blue band affixed by the Lending Library will not be removed and will be returned with the material to the IDS location printed on the band.

1. Handling multiple volumes

Process all volumes under one request number:

- Scan or enter the barcode of first volume
- Then click the multi-volume button to enter barcode(s) of next volume(s)
- Continue for each volume in set
- Click "submit" when final barcode of the set is entered

2. Loan period in local ILS

Borrowing Libraries will configure their ILS to allow for a 12 week loan period (or any combination of loan period and renewals to equal no more than 12 weeks) from the time the material is received in the system. Automatic overdue and billing notices should be configured in the ILS to alert the user to return the material.

3. Reserves

Borrowing Libraries will not use E-ZBorrow materials for course reserves. However, Borrowing Libraries may request materials in order to scan pages for course reserves. It is the Borrowing Library's responsibility to comply with copyright guidelines with regard to scanning materials for course reserves.

4. Renewals

Borrowing Libraries will abide by the 12 week loan period. However, at times there may be a need for a user to have the material longer. The Borrowing Library will contact the Lending Library via email to ask for an extension of the 12 week loan period. The Borrowing Library will abide by the Lending Library's decision.

5. Overdue materials and replacement charges

The Borrowing Library is responsible for lost materials. Therefore payment to the Lending Library is not dependent on receiving payment from the Borrowing Library's user. Library users are responsible to their home library (the Borrowing Library) for lost materials and not to the Lending Library.

Payment for lost materials is two separate processes:

1. The Lending Library invoices the Borrowing Library for lost materials 24 weeks after the check-out date. Invoices are sent to the E-ZBorrow contact at the Borrowing Library.
2. All communications with individual patrons are conducted by the Borrowing Library, not the Lending Library, which may include invoicing patrons for lost materials.

Payments for lost materials will be received by the Lending Library within 90 days after the initial invoice is sent to the Borrowing Library. If the Lending Library allows a replacement copy in lieu of payment, the Borrowing Library will provide a copy that meets the Lending Library's replacement criteria within 90 days.

If the Lending Library does not receive replacements or payment for lost books in that 90 day period, the Lending Library will call the E-ZBorrow contact at the Borrowing Library to discuss the matter. If resolution is not achieved, the Lending Library will contact the PALCI Executive Director for assistance in recovering the materials.

The PALCI Executive Director will mediate this matter and execute one or more of the following steps as needed for resolution:

- Discuss the matter with the Borrowing Library's E-ZBorrow contact and Library Director
- Authorize the Lending Library to stop filling requests from the Borrowing Library
- Consider the matter a delinquent PALCI account as described in the PALCI Financial Policy and Procedures, which is subject to formal PALCI notification of non-payment with notice to the PALCI Board of Directors and late fees.

Problem Resolution

For questions or discussion on process procedures or E-ZBorrow system issues, contact the E-ZBorrow List at ezbpractitioners@palci.org

For questions about E-ZBorrow system issues, or if your library will be closed for more than 5 days, contact the PALCI Member Services & Outreach Librarian. For complaints about another member's participation in the program, contact the PALCI Executive Director. The PALCI Staff can be reached at (215) 567-1755 by phone or admin@palci.org by email.

Sections of this document revised since 2012:

- December 2012: lost books replacement procedures
- June 2014: course reserves
- June 2016:
 - ✓ Strengthened language throughout, especially for request/shipping turnaround time. Turnaround times should be considered a service standard rather than a suggestion.
 - ✓ Encouraged sharing as much of the libraries' collection as possible by changing word "book" to "material"
 - ✓ Discouraged use of jiffy bags containing shredded materials for stuffing.

Bibliography

2011 Pennsylvania Interlibrary Loan Guidelines

https://www.webjunction.org/content/dam/WebJunction/Documents/pennsylvania/September-2011-390_Interlib_Ln_Guide.pdf

2011 Interlibrary Loan Procedures Manual

https://www.webjunction.org/content/dam/WebJunction/Documents/pennsylvania/September-2011-390_INTERLIB_LN_PROCEDURES.pdf

ALA Library Fact Sheet 8 – Interlibrary Loans

<http://www.ala.org/tools/libfactsheets/alalibraryfactsheet08>

Interlibrary Loan Code for the United States (with Supplement)

<http://www.ala.org/rusa/resources/guidelines/interlibrary>