



**PALCI**<sup>TM</sup>  
*EZBorrow*

## **EZBorrow Policies**

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

Libraries participating in the EZBorrow (EZB) system will make available for loan as much of their collections as possible. Officially, EZBorrow transactions are between the Lending and Borrowing Libraries, even though library users directly request books from other libraries via the EZBorrow system. It is recommended that libraries refrain from charging other PALCI libraries that participate in EZBorrow for resource sharing in other ILL systems as well.

All EZBorrow libraries will keep their contact, billing, staff, and policy information up-to-date in EZB Directory section accessible from [PALCI's EZBorrow Practitioners Portal](#).

It is expected that your library will meet the following policies, but if your library is in an unexpected or hardship situation and cannot meet the criteria set forth, please contact PALCI EZBorrow Support or the chair of the EZBorrow Advisory Council as soon as possible to determine the best course of action.

# Lending Library Responsibilities

## Response time

EZBorrow Libraries will give priority to EZB 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). It is important that EZB Libraries have adequate staff devoted to ensuring EZBorrow requests are printed in a timely manner. Once the request is printed, every effort is made to fill or respond to the request within 48 hours of receipt on a weekday.

Timeline for lending materials:

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

The PALCI EZBorrow band will be printed on pale blue paper. All information necessary for request processing is printed on the band.

EZBorrow libraries should make every effort to ensure item availability is as accurate as possible.

Holiday hours and response time procedures will be determined by the community each year.

## Checking out materials in the local ILS

Items will be checked out for a minimum of 18 weeks to avoid unnecessary overdue issues between libraries. This allows for a 16 week loan period and time for shipping and returning. System-generated overdue notices will be configured for 22 weeks from the check-out date.

## Recalls

EZBorrow materials will not be recalled except if needed for course reserves. When this happens, the primary contact for the Lending Library will send a ReShare Message first and follow-ups by email to the Borrowing Library requesting the book be returned as soon as possible.

## 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 should be 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). To avoid damaging materials, refrain from using excessive tape or staples, and avoid using too little or too much filler in the packaging. Please refrain from using jiffy bags with shredded material inside.

## Borrowing Library Responsibilities

EZBorrow 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 it has been returned to and received by 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 borrowed materials from the time they 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 to the library location specified on the band.

## **Loan period in local ILS**

The library to patron loan period should be determined by each borrowing library in relation to their current circulation policies, but should not exceed 16 weeks.

## **Renewals**

EZBorrow items are not renewable.

## **Reserves**

Borrowing Libraries will not use EZBorrow materials for physical course reserves.

# **Overdue Materials and Replacement Charges**

EZBorrow 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 22 weeks after the check-out date, and will email prior to invoicing, invoicing no earlier than 24 weeks after the check-out date.

Lending Libraries should make good-faith efforts toward resolving lost/overdue items.

Bills for lost materials will be sent in a timely manner, within no more than one year after 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 payment and if any restrictions apply.

The Borrowing Library is responsible for lost or damaged materials, regardless of whether the Borrowing Library has received payment from the user responsible for lost items.

Library users are responsible to their home library (the Borrowing Library) for lost materials and not to the Lending Library.

## **Process for Invoicing / Replacing Lost EZBorrow Materials:**

1. The Lending Library invoices the Borrowing Library for lost materials no sooner than 24 weeks after the item's check-out date, and no later than 12 months after the item's check-out date. Invoices or replacement requests are sent to the EZBorrow contact at the Borrowing Library. For assistance in identifying the correct individual, contact EZBorrow Support.
2. All communications with individual patrons regarding invoicing and lost materials are conducted by the Borrowing Library. The Lending Library should not contact the patrons of the Borrowing Library.
3. Payments for lost materials will be received by the Lending Library according to the Lending Library's stated invoice terms and requirements. If the Lending Library allows for a replacement copy in lieu of payment, the Borrowing Library will provide a copy that meets the Lending Library's replacement criteria.

## **Problem Resolution**

### Late Payments or Replacements for Lost Items

If the Lending Library does not receive replacements or payment for lost books within 6 months after invoicing or requesting a replacement, the Lending Library should contact the EZBorrow Contact at the Borrowing Library to discuss a timeline and resolution for the matter.

If a resolution is not reached, the Lending Library may contact the PALCI Executive Director for assistance in mediation.

The PALCI Executive Director will mediate payment matters by executing one or more of the following steps as needed for resolution:

- Discuss the matter with the Borrowing Library's EZBorrow 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.

### Questions / Problems

For EZBorrow system issues, or questions related to processes or policies, please contact EZBorrow Support.

If your library will be closed for more than five (5) days, contact EZBorrow Support.

*Revision Approval Date: December 6, 2022*

# **Supplemental Documentation**

## **EZBorrow Support Contact Information**

### **PALCI Staff**

The PALCI Staff can be reached at [support@palci.org](mailto:support@palci.org) or 215.567.1755

### **EZBorrow Advisory Council**

Current members: <https://palci.org/about/committees-working-groups/>

### **EZBorrow Community Portal**

Basecamp URL: <https://3.basecamp.com/5136829/projects/23923245>

## **Sections of this document revised since 2012:**

### **December 2022:**

- Extends the length of time for:
  - Lending library checkout - 18 weeks
  - Patron loan period - Up to 16 weeks
  - Overdue notices sent after 22 weeks for unreturned materials
  - Invoicing after 24 weeks for unreturned materials
- Updates payment timelines to reflect the Lending Library's stated invoice terms and requirements.
- Changes the stylization from E-ZBorrow to EZBorrow
- Changes the language in the response time to 48 hours to resolve inconsistencies listed elsewhere in the policy.
- Removes instructions on handling volumes
- Combine Lending and Borrowing Overdue sections
- Includes information about Basecamp, rather than using the EZB Wiki page
- Adds a Supplemental Documentation section that is not part of the policy. This allows these items to be revised as needed in future without changing the policy. It includes
  - EZBorrow Support Contact Information
  - Previously Approved Revisions
  - Bibliography

### **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.

**June 2014: Course Reserves**

- December 2012: added lost books replacement procedures

**Bibliography**

Interlibrary Loan Code for the United States (with Supplement)

<https://www.ala.org/rusa/guidelines/interlibrary>

Pennsylvania ILL Code

<https://document.powerlibrary.org/files/portal/pdf/documentation/PA-2019-ILL-Guidelines.pdf>

<https://document.powerlibrary.org/files/portal/pdf/documentation/PA-2011-ILL-Procedures.pdf>