# 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. The EZBorrow Advisory Council and PALCI Members review and revise these policies every two years or as needed.

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 Supplying and Requesting Libraries, even though library users may directly request materials from other libraries via the EZBorrow system. PALCI member libraries fund the EZBorrow service through their dues, so there are no costs per transaction for EZB requests. It is recommended that libraries offer free reciprocal borrowing to PALCI libraries 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 Community 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 EZBorrow Support or the chair of the EZBorrow Advisory Council as soon as possible to determine the best course of action.

# Supplying Library Responsibilities

## Response time

EZBorrow Libraries will give priority to EZB requests and provide the fastest service possible. Request pull slips 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. Requests should be fulfilled within 48 hours of receipt and shipped as soon as possible.

Timeline for supplying materials:
- EZB Libraries will check their supply queue at least once a day, Monday – Friday, on days their library is open.
- EZB Libraries will fill or respond to the request within 48 hours of receiving the request. 24 hours is preferred.
- EZB Libraries will physically ship materials within 24-48 hours of marking the request shipped in the EZB system. The total turnaround time from receiving the request to physically shipping the request should not exceed 72 hours.

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 their shared index holdings and lendable locations are as accurate as possible.

Winter Break and other holiday 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 Supplying Library will send an EZB system message first and follow up by email to the Requesting Library, requesting the book be returned as soon as possible.

## Shipping

Supplying Libraries may choose the method by which materials are shipped; however, the Interlibrary Delivery Service of PA (IDS) discount program is the EZB preferred shipping method. Materials should be picked up by the shipping carrier 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 Requesting Library rather than sending it back to the Supplying Library.

Libraries should pack materials in appropriate boxes or padded mailers that minimize the possibility of damage or loss in shipment.

# Requesting Library Responsibilities

EZBorrow Libraries agree to abide by generally accepted interlibrary loan guidelines.

The Interlibrary Loan Code for the United States outlines the responsibility of the Requesting Library:

> Section 4.10: "Assume responsibility for borrowed material from the time it leaves the supplying library until it has been returned to and received by the supplying library." "

> Section 4.11: "Pay promptly any… replacement, or damage fees charged by 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 Supplying 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 Requesting Library in relation to their current circulation policies, but should not exceed 16 weeks.

## Renewals

EZBorrow items are not renewable.

## Reserves

Requesting 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 Requesting Library is responsible for materials from when an item is shipped from the Supplying Library until it is returned to the Supplying Library.

All communication about overdue material and replacement charges will be between the Requesting and Supplying Libraries ONLY. The Supplying Library will not contact the Requesting Library's patrons. The Supplying Library will email the Requesting Library when the material is 4 weeks overdue, which is 22 weeks after the check-out date, and will email prior to invoicing, with invoicing occurring no earlier than 24 weeks after the check-out date.

Supplying Libraries should make good-faith efforts toward resolving lost/overdue items. Given the commitment to sharing PALCI and EZBorrow members have with each other, it is expected that a library will not stop supplying to another library without first contacting EZBorrow Support to follow the Problem Resolution steps outlined in this policy.

Bills for lost materials will be sent in a timely manner, within no more than one year after the Supplying Library's check-out date. The replacement charge is determined by the Supplying Library. When invoicing a library, the Supplying Library will mention if a replacement copy of the material is acceptable in lieu of payment and if any restrictions apply.

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

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

## Process for Invoicing / Replacing Lost EZBorrow Materials

1. The Supplying Library invoices the Requesting 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 Requesting 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 Requesting Library. The Supplying Library should not contact the patrons of the Requesting Library.
3. Payments for lost materials will be received by the Supplying Library according to the Supplying Library's stated invoice terms and requirements. If the Supplying Library allows for a replacement copy in lieu of payment, the Requesting Library will provide a copy that meets the Supplying Library's replacement criteria.

## Problem Resolution

Supplying and Requesting Libraries are expected to resolve overdue and lost materials in a professional manner. If an issue cannot be resolved promptly, libraries should contact EZBorrow Support for assistance. To uphold the commitment to resource sharing among PALCI and EZBorrow members, it is expected that a library will continue to fulfill supply requests from another library until the problem resolution process has concluded.

If a Supplying Library does not receive replacements or payment for overdue/lost materials within 6 months after invoicing or requesting a replacement, the Supplying Library should contact the EZBorrow Contact at the Requesting Library to discuss a timeline and resolution for the matter. If a resolution is not reached, the Supplying Library should contact EZBorrow Support for assistance in mediation.

EZBorrow Support will mediate payment matters by executing one or more of the following steps as needed for resolution:
- Discuss the matter with the Requesting Library's EZBorrow contact and Library Director
- Authorize the Supplying Library to stop filling requests from the Requesting 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) business days, contact EZBorrow Support.

# Supplemental Documentation

## EZBorrow Support and Community Information

**PALCI Staff/EZBorrow Support**
The PALCI Staff can be reached at support@palci.org or 215.567.1755

**EZBorrow Advisory Council**
Current members: https://palci.org/about/committees-working-groups/

**EZBorrow Practitioners Community Portal**
Basecamp URL: https://3.basecamp.com/5136829/projects/23923245

**EZBorrow Best Practices**
https://3.basecamp.com/5136829/buckets/23923245/vaults/6710128654

**ReShare Documentation and User Guide**
https://openlibraryfoundation.atlassian.net/wiki/spaces/PR/pages/1316126729/ReShare

## Policy Definitions

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| EZBorrow | PALCI's expedited interlibrary loan service that allows students, faculty, and staff to discover, request, and borrow books and other physical library materials from participating PALCI libraries. |
| Requesting Library | The library from which the request originated. Also known as the borrowing library. |
| Supplying Library | The library that owns and lends an item to a requesting library. Also known as the lending library. |
| Response time | The timeframe in which a supplying library will indicate whether they can or cannot supply the requested item. |
| Shared index holdings and lendable locations | A centralized index of records for holdings in PALCI libraries. Through this shared index, libraries indicate which locations are available for EZBorrow lending. |
| Interlibrary Loan Code for the United States | A code of behavior for requesting and supplying library material within the United States. This code is maintained and approved by the American Library Association and its members. |
| PALCI's EZBorrow Practitioners Community Portal | This online Basecamp space is for all EZB staff users. It includes messages, updates, and general community questions, along with documentation links and invites to community events on Zoom. |

## Sections of this document revised since 2012:

**July 2025**
- Replaced the terms "Borrowing" and "Lending" with "Requesting" and "Supplying" to bring terminology in line with the Interlibrary Loan Code for the United States.
- Revised language throughout the policy for clarity.
- Updated Supply Response time to clearly indicate the 72-hour turnaround time from receiving a request to shipping the request. This resolved inconsistencies listed elsewhere in the policy while maintaining the agreed-upon timeframe.
- Removed the Interlibrary Delivery Service of PA's named shipping carrier. This distinction maintains a separation between the shipping service and the shipping carrier, as the carrier is subject to change.
- Revised language in the Problem Resolution section to remove ambiguity while also reiterating EZBorrow members' commitment to sharing.
- Policy Definitions were added to the Supplemental Documentation section to enhance the clarity of the terms used throughout the document.

**December 2022:**
- Extended 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
- Updated payment timelines to reflect the Lending Library's stated invoice terms and requirements.
- Changed the stylization from E-ZBorrow to EZBorrow
- Changed the language in the response time to 48 hours to resolve inconsistencies listed elsewhere in the policy.
- Removed instructions on handling volumes
- Combinedthe  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 Explanatory Text**
https://www.ala.org/rusa/interlibrary-loan-code-united-states-explanatory-text

**Pennsylvania ILL Code**
https://document.powerlibrary.org/files/portal/pdf/documentation/PA-2019-ILL-Guidelines.pdf