

Appendix—References to Various Consortial Resource Sharing Policies

Wisconsin (Voyager)

Excerpt from their website on policies (LaCrosse)

<http://www.uwlax.edu/murphylibrary/ub/ubfaq.html>

What are the loan periods for UB materials?

There is a 28-day loan period for books and 14-day loan period for videos and curriculum materials. One-time renewals are possible for book materials only.

What if I lose an item or keep it after the due date?

Bills for non-returned or lost items will be sent to you from the lending library and will be based on the lending library's policies.

How soon can I expect to receive titles I have requested?

Most materials will be received within 2 to 4 days of the request date.

How do I follow the status of my request?

You can check the status of all your circulation activity, including UB requests, on your circulation record in Murphy Catalog. Click on the YOUR RECORD button at the top of the main search screen. You may also cancel requests and renew 28-day items via YOUR RECORD.

Georgia (Voyager)

Excerpt from their website on policies:

<http://gilexpress.usg.edu/policies.html>

CIRCULATION RULES

Loan Period: All GIL Express material has a 28-day loan period for all patrons. Two online renewals are allowed unless the material has been recalled.

Recall Fines: If a University System of Georgia library chooses to charge recall fines for materials checked out through GIL Express the fines will be \$2.50 a day for each recalled item. Recall fines apply to all patrons.

Statewide vs. Local Policies: All USG Libraries have agreed upon most of the policies that govern GIL Express. There remain some policies, such as the number of items that may be borrowed from a specific institution, that are set locally. This means that the Holding Library (the library that owns the material you wish to borrow) and the Home Library (your library) have control of certain policies. These local policies are available from each library, usually on the library's web page.

Keystone Library Network, Pennsylvania (Voyager)

Excerpt from their website on policies:

<http://pilot.passhe.edu:8022/help/ubrequest.htm>

What is UBorrow?

- *A service that lets you request books not currently available at your library. Search the catalogs of other libraries in the Keystone Library Network.*

Borrow books, in person on site, from other libraries in the Keystone Library Network.

What can be requested through UBorrow?

- *Books that are held in the general circulating collection of the library.*

What cannot be requested through UBorrow?

- *Journals, magazines, newspapers and other serials.*
- *Audio-visual materials (CDs, videotapes, etc.).*
- *Reference books and other non-circulating materials.*

How does UBorrow work?

- *Select the WCU Library Catalog (PILOT): <http://pilot.passhe.edu:8022>.*
- *Click the PILOT MyAccount button on top bar.*
- *Enter your library bar code number and your last name and click Login.*
- *Click the Simultaneous Search/UBorrow button on top bar.*
- *Select the library catalog(s) you wish to search and click Connect.*
- *Use the search feature displayed to search for the book you want to request.*
- *If there are multiple works for the title, select one and display the full record. If there is only one, you will already be at the full display screen.*
- *Click the Request button on the top bar.*
- *The Please Choose the Type of Request screen UBorrow Available (100) shows how many requests you have available to you.*
- *Click OK to display the PILOT Request UBorrow form.*
- *Verify your title and re-enter your library bar code number. Then click the Submit Request button.*
- *You can check the status of your request at any time by clicking on the MyAccount button.*

When will the book arrive from UBorrow?

- *Most items will be available for pick up at the Main Circulation Desk within four working days of the date you placed your request.*

What is the loan period for UBorrow books?

- *28 days. You may renew your book for one additional 28-day period.*

Who is eligible to use UBorrow?

Faculty, students and staff

OhioLINK (III)

Excerpt from their website on policies

<http://www.ohiolink.edu/help/catalog-faq.html#loanperiod>

How will I know when my requested items are ready for pick up?

Generally, OhioLINK items are ready for pick up in 2-3 days. You can check on the status of your requested items by viewing your personal library record/account. You'll need to view your circulation record in your local library catalog. Please contact your library if you have questions about checking your record.

What is the loan period for items borrowed through OhioLINK?

The loan period for books is three weeks and one week for all non-book items. Books may be renewed up to four times, as long as another user has not requested the book, for a total maximum borrowing period of 15 weeks. Non-book items may not be renewed.

What are the fines for overdue OhioLINK items?

Fines for OhioLINK materials are set by a coordinating committee of librarians. Overdue OhioLINK item fines are \$0.50/day. There is a \$50 fine for items that are more than 30 days overdue.

Whom should I contact about problems requesting materials, fine disputes, etc.?

Please contact your local library for the best and fastest assistance. OhioLINK staff cannot access individual library accounts/records or help with fine disputes.

Orbis-Cascade (Oregon-Washington) (III)

Excerpt from their website on policies:

<http://summit.orbiscascade.org/screens/borrow.html>

Borrowing policies for Summit include:

** Must be currently enrolled student, or current or retired faculty or staff at a member institution.*

** Borrowing from Summit is free for authorized users.*

** Loan periods and renewals*

Most items are checked out for 21 days with 1 renewal (renewed if there is no local or Summit hold on the item; check your patron record later to confirm whether the renewal was allowed).

Special materials such as videotapes and sound recordings may be available for a three-day or three-week borrowing period if the owning library elects to make this option available.

At CRL member institutions: CRL materials are checked out for 6 months.

oRenewals: Items circulated for a three-week loan period may be renewed once, for an additional three weeks, if there are no holds (local or Alliance consortium) on the item. Three-day items with no hold may be renewed once for three days. CRL items may not be renewed.

** Returning materials: Materials borrowed through Summit can be returned to your library, the owning library, or any Alliance member library.*

** Fines: Overdue fines are determined by your library. Replacement costs and administrative fees will be charged for lost or damaged items.*

** Maximum allowed: Each authorized user can have up to a combined total of 200 Summit requests or checked-out items at one time.*

Mobius (Missouri) (III)

Excerpts from their websites on policies:

From SEMO: http://library.semo.edu/info/library/ill_policy.htm#MOBIUS%20Info

How Long Will It Take?

On average, it takes 3-5 days to fill a MOBIUS request.

This delivery time is dependent upon the pick up location chosen. If an AHEC (Area Higher Education Center) pick up location is selected, an additional day or two days could be added to the delivery time.

How Will I Be Notified When My Materials Arrive?

ILL/MOBIUS staff will mail a notification letter to the address that is on record with Southeast Missouri State University. If you are a faculty or staff member, your notice will be mailed to your campus mail stop. A notification will be mailed if your request has been cancelled for any reason. You can also track the status of your request by going to the View Your Record page of the Kent Library online catalog.

Where Do I Pick Up Requested Materials?

All items chosen to be picked up at SEMO - Circulation Desk may be picked up at the Circulation Desk on the 2nd (main) floor of Kent Library.

Any other SEMO pickup location chosen means that the item may be picked up at the Office of the AHEC (Area Higher Education Center) selected. During transport to and from the AHEC and while the student has the item, the Area Higher Education Centers have been encouraged to keep records so that if an item is lost or damaged, responsibility can be identified and assigned to the appropriate party.

When Are My Materials Due?

The loan period for MOBIUS materials is 21 days. The due date will be written on a green band attached to the item. To view the due dates for all books that you currently have checked out, go to the View Your Record page of the Kent Library online catalog.

If the library patron has elected to have their requested item delivered to one of the Area Higher Education Centers, the item is checked out prior to being shipped to the AHEC and is thus due back at Kent Library on the due date. If an item has been returned to the Center but not received by Kent Library by the due date, the potential exists for the patron to be billed.

Can I Renew My Materials?

You may renew MOBIUS materials up to two (2) times. To renew your materials, go to the View Your Record page of the Kent Library online catalog. Place a check mark in the box beside any

item that you want to renew. Then click the “Renew Selected Items” button. Alternatively, you can click the “Renew All” button to renew all of your checked out items at once.

From UMSL: http://www.umsil.edu/library/access_services/mermob/acsvisiting.htm

Visiting Patrons

Visiting Patrons are faculty, staff, and students at MERLIN/MOBIUS institutions. UM-St. Louis faculty, staff, students can check out materials directly from any library participating in the MERLIN/MOBIUS consortium. These are the MOBIUS patron initiated circulation policies:

- 1. Types of materials available for loan -- monographs only are available through MOBIUS patron initiated borrowing.*
- 2. Loan length -- 21 days for all patron types.*
- 3. Renewals -- two renewals of 21 days are allowed. Items with additional holds may not renew.*
- 4. Recalls -- Materials may only be recalled by the owning library, and may be recalled from any patron type. Minimum Use: 20 days*
- 5. Reserve -- Materials borrowed through MOBIUS may not be placed on reserve at the borrowing institution.*
- 6. ILL -- Patrons should be strongly encouraged to use MOBIUS patron initiated borrowing instead of traditional ILL.*
- 7. Patron records -- Complete patron records are available only in the home cluster of the patron. Only authorized staff at the patron's home library may change, update or enter patron records for their borrowers. Only staff at the home library may override blocks for their patrons.*
- 8. MOBIUS loan rules -- MOBIUS loan rules should not be overridden to permit longer loans than originally allowed, either by extending loan periods or checking in and checking out again.*
- 9. Each institution determines who in its patron database will receive MOBIUS faculty, staff or student status. Each institution accepts responsibility for material borrowed by any person it has authorized to borrow through the MOBIUS system.*
- 10. Charges -- A lost book replacement charge of \$120 will be billed to patrons who do not return MOBIUS items 45 days after the due date. This includes a \$100 lost book fee and \$20 non refundable billing fee. The patron's home library may keep the monies collected for the billing fee only when books are returned; the owning library will get all monies collected for replacement costs of lost books.*
- 11. An institutional photo I. D. or an institutional I. D., plus a government issued photo I. D. (e.g., driver's license, state I. D., passport, etc.) will be required to check out materials as a Visiting Patron.*

From the Mobius Consortium Office: <http://mco.mobius.missouri.edu/filemanager/fileview/498/>

MOBIUS members have three methods of lending materials among institutions. These methods are traditional interlibrary loan, direct patron borrowing through the MOBIUS union catalog, and the visiting patron option of direct patron borrowing.

TRADITIONAL INTERLIBRARY LOAN

Traditional interlibrary loan is available to all MOBIUS members and covers both returnables and non-returnables. MOBIUS members will not charge each other for these traditional interlibrary loan transactions. Libraries are encouraged to implement OCLC custom holdings with all MOBIUS OCLC members as one custom holdings group to balance the load. If a MOBIUS library feels that another library is making unreasonable requests, it should contact the library to resolve the problem. Libraries should use Ariel for transmission of articles whenever possible. Borrowing libraries will be responsible for copyright compliance on requests for photocopies.

DIRECT PATRON BORROWING

Direct patron borrowing through the MOBIUS union catalog becomes available to members as their local INNOPAC catalogs are incorporated into the MOBIUS union catalog. Patrons issue online requests for materials in the union catalog and the system determines where to direct the request. Direct patron borrowing in the MOBIUS union catalog is limited to returnable items. MOBIUS members will not charge each other for direct patron borrowing within the MOBIUS union catalog and there will be no MOBIUS imposed limits on the number of requests that a patron can initiate. The MOBIUS Access Advisory Committee will monitor the lending statistics and adjust the request balancing table to spread the load as evenly as possible.

VISITING PATRON OPTION

The Visiting Patron option of MOBIUS direct patron borrowing allows a patron to visit another MOBIUS institution and check out materials. For it to be available, both the lending library and the patron's library must be participating in MOBIUS direct patron borrowing using the INN-Reach software. The INN-Reach system verifies the patron in his local cluster patron file. Borrowing using the Visiting Patron option falls outside the load leveling capabilities of the system. If a library feels the patrons of another MOBIUS library are abusing this privilege, it should contact the library to resolve the problem. The MOBIUS Executive Committee recommends that libraries try the option but no member should feel under any obligation to use the option if/when implemented.

LOCAL LIMITS

Each library determines whether it wants to limit the number of traditional interlibrary loan or patron initiated requests its patrons can make. Limits on patron initiated requests (both through the system and using the visiting patron option) are handled by the loan rules in the local cluster system.

OVERRIDES

MOBIUS INN-Reach loan rules are not to be overridden to give longer loan periods or to allow more than one renewal. MOBIUS INN-Reach loans are made for 21 days, and two renewals of 21 days are permitted. Do not check-in and then check-out in an attempt to circumvent this policy. (Rev. Nov. 19, 2002 MAAC)

RESPONSIBILITY FOR LOST OR DAMAGED MATERIALS

The patron's home library is responsible for any books provided by another MOBIUS member institution until they are received by the lending library. The MOBIUS Access Advisory Committee will recommend a reimbursement method for lost or damaged materials.

STATISTICS

Statistics will be kept for traditional ILL and direct/visiting patron borrowing. These statistics will be used as part of a review of this policy which the MOBIUS Access Advisory Committee will conduct annually in the fourth quarter of each calendar year. The results of the review will be presented to the MOBIUS Council.

Excerpt from their website on policies:
<http://www.texshare.edu/programs/ill/illprotocol.html>

6.0. Lending Policies and Loan Periods The lending policies of TexShare Libraries with regard to one another will be as liberal as possible for the convenience of the borrowing clientele, and all such policies and restrictions will be honored by the borrowing library under all circumstances.

6.1 TexShare Libraries agree to the following minimum guidelines. Libraries wishing to follow more liberal policies may do so.

6.1.1 The normal loan period for materials borrowed from another TexShare Library is a minimum of four weeks, including time required for delivery and return. Longer loan periods and renewals will be permitted at the discretion of the lending library. Lending libraries may require a shorter loan period for specific materials.

6.1.2 Recalls of materials on interlibrary loan will be honored as promptly as it is possible to retrieve materials from clientele.

CIC (combination)

Excerpt from their website on policies:
<http://www.cic.uiuc.edu/programs/CenterForLibraryInitiatives/Archive/ResourceList/CICReciprocalBorrowingAgreementGradProf05.pdf>
and <http://www.cic.uiuc.edu/cli/vel/velp.html>

Loan period: Each institution will determine its own loan period for CIC graduate and post-baccalaureate professional students. If feasible, the loan period should be the same as the loan period for their own graduate students. The return of borrowed materials is the responsibility of the student who borrowed them. He/she should factor in whatever shipping time may be required for items to be returned and checked in on the date they are due.

Recalls: Recall of loaned materials will follow local policy. Borrowers are expected to respond promptly by returning the recalled item to the lending library by the recall date.

Penalties: Borrowing from a sister institution is a privilege and not a right. Failure to comply with loan policies of the lending institution should result in a penalty appropriate to the non-compliance and generally in accord with the policy for the graduate students of that institution.

2. Loan Period.

The CIC loan period is normally twenty-eight days from date of receipt at the borrowing library. If the lending library's loan period is from fourteen to twenty-seven days inclusive, then the CIC loan period will be shortened accordingly. Items with less than a fourteen day loan period can be loaned at the lending library's discretion.

3. Renewals.

A CIC loan will be entitled to one renewal of the same length as the original loan period, unless the lending library's circulation policy prohibits renewals, or if the item has been recalled, in which case the CIC loan is not renewable.

4. Scope.

Loans. All materials whose local loan period is fourteen days or more can be

borrowed, including but not limited to, dissertations, theses, microforms, and bound journals. The lender - at their discretion on a case-by-case basis - may choose not to fill a loan (e.g. when the item is extremely fragile).

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*Proposed Interlibrary Circulation Policies for VEL Phase 1
3/25/2002*

University of California Melvyl (ExLibris and other systems)

California does not appear to have standard resource sharing policies

Excerpts from their websites on policies:

From Berkeley: <http://library.berkeley.edu/ILS/ibs.html#long>

HOW LONG DOES IT TAKE?

On the average, allow two weeks from the date of request. If the material is readily available in a library with which IBS has a special arrangement, it may be available sooner. If IBS has to go to more than one location for the material, it will take longer.

SPECIAL CONDITIONS

The lending library may impose special conditions on use, such as library use only, for use in the Bancroft Library, non-renewable, or user's signature required. Conditions are noted on the IBS band attached to the book. When you accept the loan, you are obliged to honor these conditions.

LOAN PERIODS

The lending library sets the loan period which may range from two to four weeks. IBS materials are subject to recall by the lending library at any time. Please return recalled items immediately. Overdue materials jeopardize our ability to borrow. Materials cannot be borrowed for class reserve, exhibit, or other long-term use.

From UCLA: <http://www2.library.ucla.edu/service/1963.cfm>

And <http://www2.library.ucla.edu/service/1964.cfm>

How Long it Takes to Fill Requests

Requested items usually arrive within three weeks after the request is submitted, although difficult-to-obtain items may take much longer. Normal turnaround time for requests submitted through CDL Request is one to two weeks. Delivery time is related to the lending library's procedures, availability of materials, and the delivery service used. Please be sure to allow enough time to receive requests.

You will be notified by mail, telephone, or email when the item arrives. The notification will specify where and when you can pick up the item. Return items to the same desk. It is important to keep ILL items separate from materials checked out from UCLA libraries.

How Long Items Can Be Kept

If the item is a photocopy, it is yours to keep in most cases. For loans of books or other items, the lending library sets the length of time and any special conditions of the loan, such as "library use only" or "nonrenewable."

To request a renewal, contact the interlibrary loan desk at which you picked up the item. Normally, up to two renewals of two weeks each in length are permitted by lenders.

SUNY (ExLibris)

SUNY does not appear to have standard resource sharing policies

Excerpt from their website on policies:

<http://www.sunyconnect.suny.edu/policies/policy.htm>

Open Access Policy

State University of New York Policy Handbook, No. 130 (Revised Edition 1981)

Definition of Open Access

Open Access, is defined as a policy under which the library of any of the State University units will provide direct service, including in-person loan of unrestricted and available library materials to any eligible member of the State University community. Reserve collections may be considered restricted material. Library materials are defined as those materials that are under an individual library's administration.

Eligibility

Eligible library users are those persons currently enrolled in or employed by the institutions in the State University. Members of the State University who are continuing their association with the University in the next full semester are also eligible for Open Access privileges.

Identification

Identification of the borrower will be established by the lending library. The lending library will maintain adequate records of its Open Access registrants.

Conditions of Loan

The borrower is subject to such rules and regulations as are established by a lending campus for its own community, including those rules which govern access to and the availability of library materials, loan periods, recalls, and delinquency fees.

Return of Library Materials

- 1. The borrower is expected to protect borrowed materials and return them directly or via the borrower's home library, or any State University of New York library, to the lending library by the due date.*
- 2. Notices of overdues, recalls, and unremitted charges will be sent by the lending library to the borrower. The home campus will intercede on behalf of the lending library, on request. The home library has ultimate responsibility for the return of tardy materials and for payment to the lending library of unremitted delinquency fees and lost item charges.*
- 3. Replacement costs for library materials will be determined by the lending library in accordance with its existing policies.*
- 4. Open Access privileges will be withdrawn from any user, given evidence of abuse.*