OCLC IFM- Interlibrary Loan Fee Management transcripts

Hi, welcome to the OCLC IFM: Interlibrary Loan Fee Management session.

In this video, you will see a description what IFM is and how it works, where you can specify IFM preference, and access your statistics reports.

IFM- Interlibrary Loan Fee Management is the OCLC method of payment that automates the billing for ILL transactions, using OCLC accounts of the two libraries involved in the transaction to track the exchange.

IFM is used by both Borrowing and Lending libraries in OCLC interlibrary loan services. If a fee is charged for an ILL request, money has to change hands between the two libraries involved in the transaction.

IFM **_credits_** the OCLC account of the Lending library and **_debits_** the account of the Borrowing library, for the amount to be charged by the Lender filling the request.

This streamlines the library workflow because rather than sending or receiving small payments to or from several libraries and trying to keep up with everything, the libraries have only to manage their OCLC account and the loan reports. But both the Borrowing and Lending libraries must accept IFM for this option to work.

Borrowing and Lending libraries can specify their IFM preference in the system. There are three options to specify IFM preference:

 In OCLC Policies Directory

 In OCLC Service Configuration

Within the ILL request workform

Let's see how you can do this in these three options.

As a lending library, you can specify IFM preference form OCLC Policies Directory. The easiest way to access OCLC Policies Directory is by clicking the respective link on your interlibrary loan service homepage.

From there click the Policies tab then click the Add button from either the copy or loan policy section a form like this will pop up for you to enter your policy information, scroll down to the Details section under Billing Methods click the Add Billing Method button, check the box, then select the type to be OCLC IFM and enter your fee using numbers only.

Then scroll down and save your form. IFM will then display on your Policies as accepted method of payment.

Another way of specifying IFM preference is in OCLC Service Configuration. As either borrowing or lending library, you can indicate IFM use on your constant data. Constant data is created in OCLC Service Configuration, and the easiest way to access the OCLC Service Configuration is by clicking the respective link on your interlibrary loan service homepage.

From there click WorldShare ILL option on the left side panel then either Borrower data (for constant data for borrowing libraries) or Lender Data (for constant for borrowing libraries) either open a constant data you have created to edit it to add IFM or create a new constant data by clicking the Create a New CD record link.

As you scroll down on the workform, mark the IFM option and enter the maximum cost your library accepts. Then save your form. When you apply this constant data to an ILL request, then the other library will see that you accept IFM as method of payment and the maximum cost you accept.

The third option to specify IFM preference is through an ILL request workform. As you are creating your request scroll down on your workform to the Billing section and mark IFM for payment then enter the maximum cost your library accepts.

As a Borrowing library, after you have specified your IFM preference, when selecting lenders from the list of libraries that own the item on a request, choose those that indicate that they accept IFM or when searching the OCLC Policies Directory for potential lenders to add to your custom holdings, on the left side panel, under Billing Method - select and mark OCLC IFM.

As a lending library, after you have specified your IFM preference, before answering to a request, check if the borrowing library accepts IFM and the maximum cost accepted.

If the Borrowing library doesn't accept IFM or the maximum cost is lower than what you charge, you can either answer "No" to the request and select the reason- the request will then go to the next lender in the string, or you can answer "Conditional" and select the additional information for the lending library to accept or decline.

As a reminder: IFM transfer is processed when the lending library fulfills the request by sending the item to the borrowing library. Enter numeric values only when entering the Maximum cost for IFM either on the constant data workform or on the ILL cost field on the ILL request workform.

Libraries in the UK, South Africa, Australia, Eurozone, and Canada can use their local currency for IFM for requests within their own territories.

Their local currency will be configured for their interlibrary loan service page and be available to be selected as they fill out the maximum cost field. For international transactions, these libraries continue to use US dollar.

Lending libraries can issue IFM refund when they charge borrowing libraries by mistake. This option is available under the Actions button when a Lending library opens an ILL request. This option is available even for requests with the status as "Closed".

You will be able to access ILL reports with the details of your requests either as lending or borrowing library.

From your interlibrary loan service homepage click the OCLC Usage Statistics link enter your 9-digit authorization and password. Please, contact OCLC Support if you forgot or don't know your 9-digit authorization. Click the link to either Borrower or Lender Resource Sharing Stats Report to see your requests in detail including the amount charged.

IFM simplifies tracking, processing and collection of ILL request fees.

If you have questions, please, contact OCLC Support in your region at the url on the screen. Thanks for watching!