

Borrowing ILL Status Definitions

<p>Awaiting Lenders - The system is searching all libraries to populate the ILL request Lender List. Once "background processing" is completed, and the Lender List for the request has been generated, the request is automatically forwarded to the first lender in the Lender List, unless a patron has added a note, in which case the request is placed in Awaiting Approval.</p>		
<p>Awaiting Approval - Request is awaiting approval before being sent to lenders. Patron has added a note that needs to be reviewed by the borrowing library.</p>		
	<ul style="list-style-type: none"> • Approved - Send – This option indicates the ILL request has been approved by appropriate library staff, and the request is forwarded to the specified lender(s). • Cancel – This option indicates the ILL request is cancelled. • Delete – This option flags the associated request for deletion. 	
<p>Not Received - Borrower has not received item from lender, and deadline (Due date) has expired.</p>		
	<ul style="list-style-type: none"> • Received – This option indicates the requested material has been received from the lender. • Lost – NOT RECOMMENDED 	
<p>Not Received/Overdue - lender has sent an Overdue notification to borrower for an item that has not yet been received by borrower.</p>		
	<ul style="list-style-type: none"> • Received – This option indicates you have received the item. Selecting this option sets borrower's status for the ILL request to Received. • Lost – NOT RECOMMENDED 	Stays in Not Received/Overdue for 730 days.
<p>Renewal - Lender allows borrower to renew loan. Renewals are not allowed in ComCat policy.</p>		
	<ul style="list-style-type: none"> • Returned – This option indicates you have shipped the borrowed material back to the lender. • Renewal – This option indicates you are requesting another extension of the loan for the borrowed material. And sets lender's status for the ILL request to Renewal. Renewals are not allowed in ComCat policy. • Lost – NOT RECOMMENDED 	Midnight Processing moves request to Overdue .
<p>Recalled - Lender needs item returned early.</p>		
	<ul style="list-style-type: none"> • Returned – This option indicates the recalled material has been returned to the lender. • Received – This option indicates the recalled material has been received from the lender. • Lost – NOT RECOMMENDED 	Midnight Processing moves request to Overdue .
<p>Unfilled - Borrower's request has been submitted to <i>all</i> lenders in the Lender List, and has not/will not be filled by any lender. Or request was changed to Unfilled after the deadline has expired.</p>		
	<ul style="list-style-type: none"> • Approved-Send – This option indicates the ILL request has been approved for resubmittal by appropriate library staff, and the request is forwarded to the specified lender(s). <ul style="list-style-type: none"> ○ You <i>must</i> enter the lenders to whom you wish to submit the request in the Lender List on the Full Record Display for the request. You <i>may</i> need to change the Need By date on the Full Record Display • Delete – This option flags the associated request for deletion. The request is deleted during midnight processing. <p>The Full Record Display for requests with a status of Unfilled includes a For Patron: Why Request was not Filled field. Text entered in this field is viewable by the patron through the ILL Request Tracking feature. Text is displayed to the patron in the Status field under the heading Note from library staff. This field is intended to allow library staff to inform the patron of the reason(s) the request was not filled</p>	Midnight Processing moves request to Expired after Need by date for the request has passed.
<p>Shipped - Lender has shipped requested title to borrower.</p>		
	<ul style="list-style-type: none"> • Received – This option indicates you have received the requested material. • Lost — NOT RECOMMENDED 	Midnight Processing moves request to Not Received after the <i>Due date</i> has passed.
<p>Complete - Lender has received material from borrower. The system will automatically delete Complete requests after preset period of time.</p>		
	<ul style="list-style-type: none"> • Lost — NOT RECOMMENDED • Delete – This option flags the associated request for deletion during midnight processing. 	
<p>Conditional - Lender can supply the requested item subject to the conditions specified.</p>		
	<ul style="list-style-type: none"> • Accept Condition– Sets the request to Pending. This option indicates you accept ALL conditions specified by the lender, and the lender may continue processing the request. You may wish to add a note in the History Notes to confirm acceptance of conditions, agree to the shorter loan period, indicate the delivery service to return the loaned item, etc. • Reject Condition– This option indicates you <i>do not</i> accept ALL conditions specified by the lender. <ul style="list-style-type: none"> ○ Selecting this option forwards the ILL request to the next lender in the Lender List for this request. 	Stays in Conditional for <i>Days to Respond</i> or until <i>need-by-date</i> expires.

Received - Borrower has received item from lender.		
	<ul style="list-style-type: none"> • Returned – This option indicates you have shipped the borrowed material back to the lender. • Renewal – DO NOT USE Renewals are not allowed in ComCat policy. 	Midnight Processing moves request to Not Received after the <i>Due date</i> has passed.
Rejected Renewal - Lender denies renewal of loan.		
	<ul style="list-style-type: none"> • Returned – This option indicates you have shipped the borrowed material back to the lender institution. • Renewal – This option indicates you are requesting an extension of the loan of the borrowed material. Renewals are not allowed in ComCat policy. • Lost – NOT RECOMMENDED. 	Midnight Processing moves request to Overdue after <i>Days to Return</i> has passed.
Overdue - Borrower has not returned item to lender, and has expired.		
	<ul style="list-style-type: none"> • Returned – This option indicates you have shipped the borrowed material back to the lender institution. • Renewal – This option indicates you are requesting an extension of the loan of the borrowed material. Renewals are not allowed in ComCat policy. • Lost – NOT RECOMMENDED 	Stays in Overdue for 730 days.
Expired Need By - date for the request to be shipped has passed and the lender has not responded.		
	<ul style="list-style-type: none"> • Approved-Send – This option indicates the ILL request has been approved for resubmittal by appropriate library staff, and the request is forwarded to the specified lender(s). <ul style="list-style-type: none"> o Selecting this option sets lender's status for this request to Pending. o You <i>must</i> enter the lenders to whom you wish to submit the request in the Lender List on the Full Record Display for the request. • Received – This option indicates you have received the requested material. • Lost – NOT RECOMMENDED 	Stays in Expired for <i>Days to Delete</i> .
Retry - Lender asks that borrower resubmit the ILL request at a later date.		
	<ul style="list-style-type: none"> • Approved-Send – This option indicates the ILL request has been approved by appropriate library staff, and the request is forwarded to the specified lender (s). <ul style="list-style-type: none"> o Selecting this option sets lender's status for this request to Pending. You <i>may</i> need to change the Need By date on the Full Record Display of the ILL request to prevent the request from being placed in Expired status. • Delete – This option flags the associated request for deletion. The request is deleted during midnight processing. The Full Record Display for requests with a status of Retry includes a For Patron: Why Request was not Filled field. Text entered in this field is viewable by the patron through the ILL Request Tracking feature. Text is displayed to the patron in the Status field under the heading Note from library staff. This field is intended to allow library staff to inform the patron of the reason(s) the request was not filled. 	Midnight Processing moves request to Expired after Need by date for the request has passed.
Cancelled - Request has been cancelled by borrower and will not be sent to any remaining lenders in the Lender List. The system automatically deletes Cancelled requests after a preset period of time (set in the System Wide Record) has expired.		
	<ul style="list-style-type: none"> • Approved-Send – This option indicates the ILL request has been approved by appropriate library staff • Delete – This option flags the associated request for deletion. The request is deleted during midnight processing. The Full Record Display for requests with a status of Cancelled includes a For Patron: Why Request was not Filled field. Text entered in this field is viewable by the patron through the ILL Request Tracking feature. Text is displayed to the patron in the Status field under the heading Note from library staff. This field is intended to allow library staff to inform the patron of the reason(s) the request was not filled. 	Midnight Processing deletes this request.
Patron Cancellation Requests - Patron has submitted a "cancel" request (from the ILL Request Tracking screen) for an ILL request with a current status of Awaiting Approval, Pending or Will Supply/In Process .		
	<ul style="list-style-type: none"> • Cancel - This option indicates you accept the patron's cancellation request, and the ILL request is cancelled. • Request Cancel - This option indicates you accept the patron's cancellation request, and the <i>current lender</i> is notified of the cancellation request. The lender must confirm the cancellation before the ILL request is cancelled. <ul style="list-style-type: none"> o Selecting this option sets lender's status for the ILL request to Pending Cancel. The lender must accept the cancellation before the ILL request is cancelled. • Deny Patron Cancellation -This option indicates you <i>do not</i> accept the patron's cancellation request, and the request is processed in the normal manner. 	

Lending ILL Status Definitions

Pending - Request has been received by lender, but has not yet been acknowledged.		
	<p>You <i>must</i> provide a Reason/Condition to accompany the change in status</p> <ul style="list-style-type: none"> • Will Supply/In Process – This option indicates you are working on the request or will fill the request, but have not yet sent, the requested material to the borrower. This holds the request at your library indefinitely. • Shipped - This option indicates you have shipped the requested material to the borrower. Stays in Pending for <i>Days to Respond</i> or until <i>need-by date</i> expires. • Retry - This option indicates you are currently unable to supply the requested material, but <i>may be</i> able to supply the material at a later date. • Conditional - This option indicates you are able to supply the requested material under specified conditions or restrictions. <ul style="list-style-type: none"> ○ You may wish to include a <i>detailed description</i> of the conditions or restrictions in the History Notes. • Will Not Supply – This option indicates you are currently unable to supply the requested material to the borrower. The <i>default Reason/Condition</i> for this option is Omit Reason. (The request <i>will not</i> go to Retry). 	Stays in Pending for <i>Days to Respond</i> or until <i>need-by date</i> expires.
Will Supply/In Process - Request has been accepted by lender, but has not yet been filled. Moving a request to Will Supply/In Process will change the deadline date from the deadline date on the request (typically 3-5 days) to the current date plus 730 days (i.e., two years). This holds the request at your library indefinitely.		
	<p>You <i>must</i> provide a Reason/Condition to accompany the change in status</p> <ul style="list-style-type: none"> • Shipped - This option indicates you have shipped the requested material to the borrower. • Retry - This option indicates you are currently unable to supply the requested material, but <i>may be</i> able to supply the material at a later date. <ul style="list-style-type: none"> ○ The <i>default Reason/Condition</i> for this option is Omit Reason. • Conditional - This option indicates you are able to supply the requested material under specified conditions or restrictions. • Will Not Supply – This option indicates you are currently unable to supply the requested material to the borrower. 	Stays in Will Supply/In Process for 730 days or until <i>need-by date</i> expires.
Renew/Overdue - Borrower requests loan renewal for title from lender <i>and</i> for the item has expired. Renewals are not allowed in ComCat policy.		
	<ul style="list-style-type: none"> • Accept Renewal - This option indicates you accept the borrower's request for a loan renewal of the currently borrowed material. Borrower may retain the material for an additional period of time as specified in your library's Participant Record or in the ILL request. Renewals are not allowed in ComCat policy. • Reject Renewal - This option indicates you reject the borrower's request for a loan renewal of the currently borrowed material • Recall - This option indicates you reject the borrower's request for a loan renewal of the currently borrowed material. Borrower <i>must</i> return the borrowed material as soon as possible. • Check In - This option indicates the lender has received the item from the borrower and the ILL transaction is completed. • Lost - NOT RECOMMENDED 	
Pending Cancel - Borrower has indicated that the patron no longer needs the item		
	<ul style="list-style-type: none"> • Confirm Cancel – This option indicates the ILL request is cancelled. This must be done to remove the request from the request manager • Reject Cancel - This option indicates you reject the cancellation request, and will provide material to borrower as requested. <ul style="list-style-type: none"> ○ Selecting this option sets lender's status for this request to Will Supply/In Process. 	Stays in Pending Cancel for <i>Days to Respond</i> .
Renew Pending - Borrower requests loan renewal for item from lender. Renewals are not allowed in ComCat policy.		
	<ul style="list-style-type: none"> • Accept Renewal - This option indicates you accept the borrower's request for a loan renewal of the currently borrowed material. Borrower may retain the material for an additional period of time as specified on the request. Renewals are not allowed in ComCat policy. • Reject Renewal - This option indicates you reject the borrower's request for a loan renewal of the currently borrowed material. • Recall - This option indicates you reject the borrower's request for a loan renewal of the currently borrowed material. • Check In - This option indicates the lender has received the item from the borrower and the ILL transaction is completed. The system marks the ILL transaction as complete and stores historical data pertaining to the completed transaction for statistical reports. • Overdue - This option indicates borrower has not returned material to lender, and has expired. 	Midnight Processing moves request to Overdue after <i>Days to Return</i> has passed.
Returned - Borrower has shipped material back to lender.		
	<ul style="list-style-type: none"> • Check In - This option indicates the lender has received the item from the borrower and the ILL transaction is completed. The system marks the ILL transaction as complete and stores historical data pertaining to the completed transaction for statistical reports. • Lost - NOT RECOMMENDED • Delete - This option flags the associated request for deletion. The request is deleted during midnight processing. 	