Managing Borrowing Requests

Awaiting Approval

A request in “Awaiting Approval” status indicates that a patron of your library has placed a request with a patron note. The request will not be sent to a lending library until it has been reviewed and acted upon.

1. From the Request Manager, click the “Awaiting Approval” link
2. Click on the Title of the request – this will bring up the “Full Record Display”
3. Review the Patron’s Notes field. **If the note has information relevant to the request (“send volume 2”) be sure to copy it into the Borrower’s Notes field before approving. To protect patron privacy, Patron’s Notes are not visible to the Lending Library.**
4. Once the note has been copied and the request is ready to be sent, change the status in the Status Options box to “Approved – Send”
5. “Submit” the request
Receiving a Borrowing Request

When items arrive at your library, they can be received using any of the following options:

A. From the Request Manager, select the hyper linked “Shipped” status and select the title from the “Borrower’s Shipped List”

B. From the Borrower navigation menu select “Title Browse” (this returns all titles being borrowed by your library). Search for or select the title from the list

C. From the Request Manager/Borrower navigation menu select “Request Number Search”. Enter the request number in the search box
Option A. Borrower’s Shipped List

From the Borrower’s Shipped List requests can be processed individually or as a group.

If the received item has the same title and request number as indicated in the title list.

1. Select “Received” from the “Status” dropdown.
2. When the status has been changed for all items in the Shipped List.
3. Select the “Submit” button in the upper right hand corner. This updates the request status and creates a temporary item record in your ILS and, if applicable, places that item on hold for the requesting patron.

If it is not clear that the received item matches a request

1. Select the Title link for a probable request
2. Review the request.
   a. If it does not appear to be the correct request, do not change the status.
3. If it does appear to be the correct request
4. Select Received from the Status Option dropdown.
5. Select the Submit button in the upper right hand corner. This updates the request status and creates a temporary item record in your ILS and, if applicable, places that item on hold for the requesting patron.
If Staff are Unable to Mark a Request as Received
Sometimes a request will retain its **Shipped** status despite staff marking it as **Received**. This might happen if ComCat is not able to place a hold and build a temporary item record in the library’s ILS. Check the ILS to see if the patron is somehow blocked (fines, too many holds, etc.). Clear up any issues with their account and **Receive** the item again in ComCat. If staff continue to experience problems, email the Helpdesk at commonwealthcatalog@flo.freshdesk.com.

Cancel Shipped Request
When a **Shipped** request arrives at the Borrowing Library they can elect to use the status, **Cancel Shipped Request**. This status allows the Borrowing Library to acknowledge that the item was delivered, however, this status does not trigger a patron email notice, a temporary item record to be created, or a hold to be placed on the patron’s account. This status may be helpful if the patron no longer needs the item, or if the patron does not have borrowing privileges as specified by the network’s policy.

Note: Best practice indicates that items in **Cancel Shipped Request** status should be marked as **Returned** before being sent back through the delivery system.
Returning a Borrowing Request

When items are ready to be returned, they can be returned to the lending library, using any of the following options:

A. From the Manage Borrowing Requests, Action Items select the hyper linked Received status and select the title from the Borrower's Received List
B. From the Request Manager/Borrower navigation menu select Title Browse (this returns all titles being borrowed by your library). Search for or select the title from the list
C. From the Request Manager/Borrower navigation menu select Request Number Search. Enter the request number in the search box
Option A. Borrower’s Received List

From the Borrower’s Received List, requests can be processed individually or as a group.

If the received item has the same title and request number as indicated in the title list.

1. Select Returned from the Status dropdown.
2. When the status has been changed for all items in the Received List.
3. Select the Submit button in the upper right hand corner. This updates the request status and discharges the item from your patron’s record in your ILS.

If it is not clear that the returning item matches a request

1. Select the title link for a probable request
2. Review the request.
   a. If it does not appear to be the correct request, do not change the status.
3. If it does appear to be the correct request
4. Select Returned from the Status Option dropdown.
5. Select the Submit button in the upper right hand corner. This updates the request status and discharges the item from your patron’s record in your ILS.