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## Using IFMs to Pay Invoices for Lost and Damaged Books Skip the Paperwork and Save Time

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# Using IFMs to Pay for Lost Items (Skip the Paperwork and Save Time)

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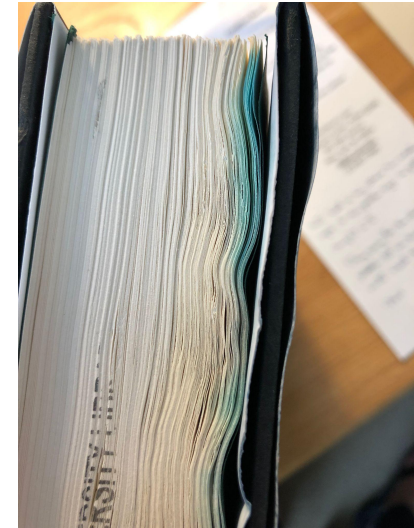
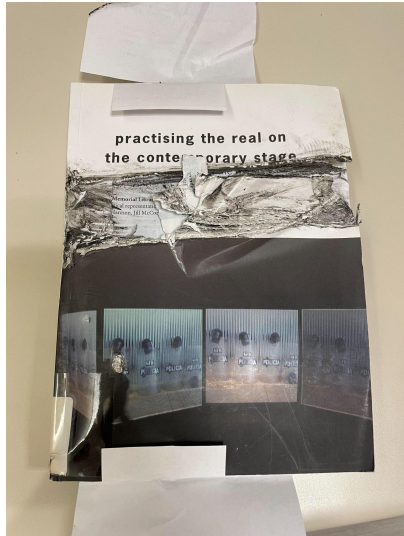
[jcho@gc.cuny.edu](mailto:jcho@gc.cuny.edu)

IDS Project Conference

University at Albany  
July 25, 2024

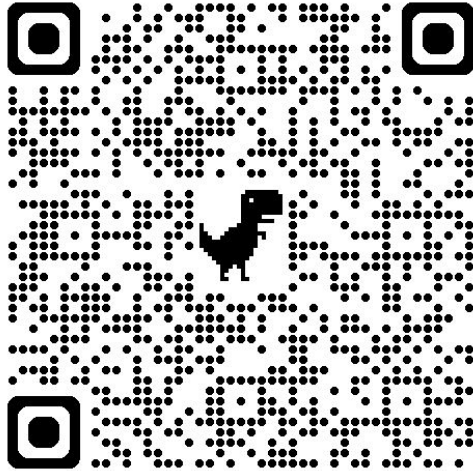
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# Things Get Damaged and Lost





# Who is responsible?



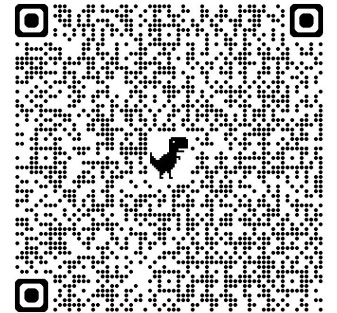
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## Replacement Copies

- Are replacement copies accepted?
- Is there still a processing fee?
- (If lost/not known otherwise): was the book hardcover or softcover?

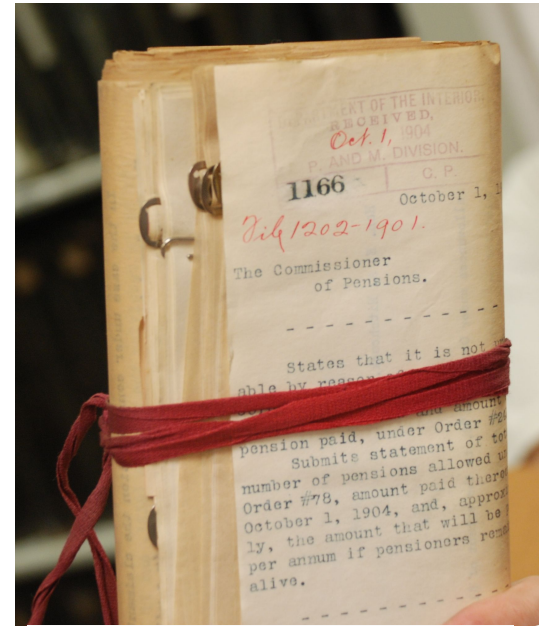
If possible help the user if possible to locate copy to buy

- Check on acceptable condition of replacement copy
  - *E.g. New, Like New, Fine, Very Good, etc.*



## Processing Invoice payments

- Can be (very) slow
  - Vendor registration forms, check request forms, multiple steps
  - Follow ups (both borrowing and lending libraries)
  - Record keeping
- Is this cost effective?
- Payment may not directly fund replacement





## Why Use IFMs to Pay Invoices

- Fast/immediate
- Reduces OCLC bill > direct benefit to libraries
- Record keeping in resource system itself
- We've been doing this for 29 years for transaction fees...

Con:

- ...only if it is against a requirement in your institution

# Using IFMs in ILLiad

Paying library: send a “dummy” request—make sure that it’s an *article* req.

The screenshot displays the ILLiad interface for a request. At the top, there is a toolbar with various icons and labels: Cancel Request, Renew Request, Send Delivery Notification, Route, Route To Document Delivery, Add Flag, Remove Flag, Clone to Current User, Clone to Another User, Policies Directory, Billing, View, Send Notification, Pending Updates, and Import into Resubmission. Below the toolbar are tabs for Detail, History, OCLC, Z39.50, and PubMed/Docline. The main form is titled 'General Request Information' and includes fields for Transaction Number (693802), Username (test), Transaction Date (9/11/2023 1:36 PM), Delivery Method (Hold for Pickup), Service Level (Regular), and Billing Account. A red circle highlights the 'Article' radio button selected in the request type dropdown. To the right, 'OCLC Information' shows OCLC Number (221136993), OCLC Number (0), Lending String (redacted), Lender, System ID (OCLC), and OCLC Status (SUPPLIED). Below the main form is a tabbed interface with 'Article Info' selected. The 'Journal Title' field contains '\$150 IFM Replacement Cost Payment for ILL #201184019 [ATTN: H. Alonso Á. de Araya]' and is highlighted with a red circle. The 'Article Title' field contains 'IFM Replacement Cost Payment for ILL #201184019' and is also highlighted with a red circle. The 'Original Journal Title' field contains '\$150 IFM Replacement Cost Payment for ILL #201184019 [ATTN: H. Alonso Á. de Araya]'. On the right side of the 'Article Info' tab, there are checkboxes for 'Accept Alternate Edition' (checked), 'Accept Non English', 'Allow Copies?', 'Copyright Already Paid?', 'Allow Renewals?', 'Library Use Only?', 'Replacement Pages?', and 'Priority Shipping'. The 'Item Information' section on the far right includes fields for Call Number, Location, Due Date, Reason For Cancellation, Item Num/Ref Num, ISxN, and Special Instructions.



- Payee library in the lending string
- Max Cost = invoice amount

OCLC Request

Home

Save Delete Show Transaction Yes No Manual Complete Manual Receive Manual Not Received Manual Return Undo Shipped

Process Conditional Manual Processing

Work Form Detail Local Holdings Collection Data

General Information

ILL	221136993	Borrower	ZGM	Req Date	20230821	Need Before	20230920
Status	SUPPLIED	Patron		Rec Date	20230911	Renewal Req	
OCLC	0	Source	ILLiad	Due Date	N/A	New Due Date	
Lending String	[REDACTED]			AE Alert			

Bibliographic Information

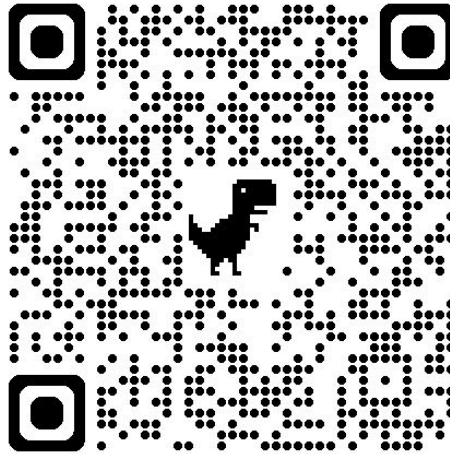
U Title			Title	\$150 IFM Replacement Cost Payment for ILL #20 11840 19 [ATTN: [REDACTED]]			
Author			Edition			Series	
Article	\$150 IFM Replacement Cost Payment for ILL #20 11840 19 [ATTN: [REDACTED]]		Article Author				
Imprint			Volume	No			
Date			Pages	ISBN			
Verified	<TN:693802> <ODYSSEY:206.		Language	DOI		PMID	

Borrowing Lending

Ship To Attention	The Graduate Center, CUNY--Library, ILL		Bill To Attention	OUR FEIN # IS 132505695. BILL/INVOICE *MUST* INDICATE			
Ship To Address	The Graduate Center, CUNY--Library, ILL		Bill To Address	The Graduate Center, CUNY--Library, ILL			
	365 Fifth Ave			365 Fifth Avenue			
City	New York	State/Province	New York	City	NEW YORK	State/Province	New York
Postal Code	10016	Country	United States	Postal Code	10016	Country	United States
Ship Via	METRO #98	ODYS: Max Cost	150	Type	Ifm	Copyright Compliance	US_CCL
Borrowing Notes	ZGM IS A FREE LENDER/SUPPLIER. WE BELONG TO SHARES, IDS,		Billing Notes				
FMail	ill@unc.cuny.edu		Affiliation				

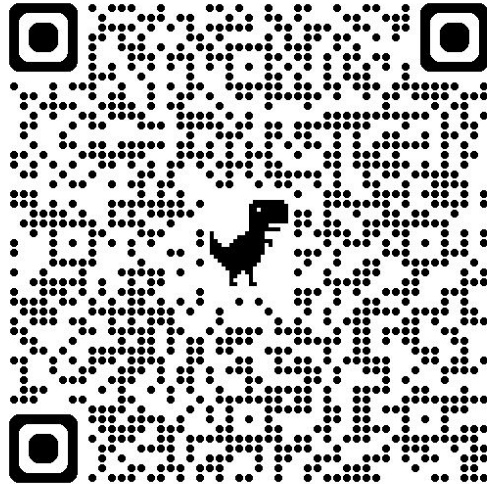


Charging library: “fill” the request and charge the invoice amount.





## Use IFMs in Worldshare ILL or Tipasa



*How to configure IFM for replacement cost billing for lost items*

© OCLC

# Use IFMs: Verify

- In Worldshare ILL, search for the request
- Scroll to the bottom of the request form and expand *Request History*:

Request History

**Automation History**  
No automations exist.

**Supplier History**

Date	Supplier	Response
08/25/2023, 00:32:45	[REDACTED]	No - Aged to same lender
08/31/2023, 00:33:18	[REDACTED]	No - Aged to same lender
09/06/2023, 00:34:06	[REDACTED]	Supplied
09/06/2023, 00:34:10	[REDACTED]	No - Aged to same lender

**ILL Fee Management (IFM) History**

Date	Supplier	Transaction
09/11/2023, 13:23:22	[REDACTED]	IFM Payment - 150.00 USD

**Event History**

Date	Note
10/11/2023, 21:45:38	Personally identifiable patron data deleted from request

ISO Log [Refresh](#)



## IFM Lending Messages

The following messages may be displayed in the ILL Fee Management (IFM) History section of a lending request:

Message	Meaning
IFM Payment Pending	The system is processing an IFM payment in response to the recent Ship action.
IFM Payment	The system has successfully processed the IFM payment for this request—this includes the amount credited to the lender.
IFM Error	Something has prevented the system from completing the IFM Payment successfully. Possible reasons for an IFM payment not to proceed as expected are: <ul style="list-style-type: none"><li>• The borrower had not set their IFM flag in the request.</li><li>• The lender's charge exceeds the borrower's max cost.</li><li>• The system has been unable to contact the IFM service so an IFM payment could not be made for this request.</li></ul>

(OCLC, 2017)



## Use IFMs: Finish

- Borrowing library:
  - “Receive” the request and route to Request Finished (or wherever you prefer).
- Lending library:
  - Update/complete your billing records, notify other library units, etc.



## References

- OCLC. (2017, June 19). *Manage IFM*. [https://help.oclc.org/Resource\\_Sharing/WorldShare\\_Interlibrary\\_Loan/Interlibrary\\_Loan\\_Fee\\_Management/Manage\\_IFM](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Interlibrary_Loan_Fee_Management/Manage_IFM)
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# Thank you!

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**& Special thanks to: Darlene Virgil, Colgate University** (and other colleagues who did IFM-based replacement transactions with us).