SCOOLS
Union Catalog
Inter Library Loan (ILL)

This is an outline of an ILL procedure from start to finish. Details of each step are included on the following pages.

1. Access SCOOLS through your Library OPALS integrates ILL loans and returns in OPALS circulation. (actual website is http://scools.org)

2. Requesting: asking for an item to be sent to your library for a patron. This makes you the “REQUESTER” for this item. Start process in OPALS. ILL > My Requests

3. Responding: fills a request for an item from your library. This makes you the “RESPONDER”. For this item. Start process in OPALS. ILL > ILL Responses. **Automatically creates a Loan in OPALS to requesting library.

4. Requested Item has arrived at your library. Loan this ILL to patron. Start process in OPALS. ILL > ADD ILL Temp Record. Then Circulations > Loans > loan temp items to patron.


6. Receiving ILL. ILL Item arrives back to responding library. Start process. ILL > Responder-Receive . **Automatically returns items in OPALS.

**NOTE WORTHY:**

⇒ A packing slip should ALWAYS travel with an item. This has ILL ID and school information needed to track the item.

⇒ MARK the packing slip “return to: Library Name” if you are going to use the original packing slip.

⇒ Address ALL non ONC BOCES schools items to DEB COLE or CHERYL MILLER at OAOC in Milford. We track ALL ILL outside ONC BOCES ILLs and ship them to the corresponding BOCES.

⇒ ONC BOCES school items can be addressed directly to them (point—to—point). If you need a list of ONC BOCES school library, please let me know.
ILLs can be processed directly through OPALS. This will automatically create Loans and Returns in OPALS as well as automatically returning ILLs in SCOOLS. This method will help track ILLs seamlessly.

Click ILL > My Requests to begin an ILL request.
The SCOOLS union Login Screen will appear.

Using the down arrows, filter down to your school library.

Login
The ILL Request screen will appear with the Search Box and your list of previous ILL Requests.

Search Features:

**Basic Search:**
Change the search field from ANYWHERE by clicking the down arrow & selecting a new field.
Enter the criteria in the search box & click the Search button.

**Refined Search:**
Use any of the features below to refine the search.

Where you are searching

Levels: Lexile ; Fountas & Pinnell ; Accelerated Reader ; Reading Counts

Select Location allows you to filter to a specific BOCES (ie; ONC) all the way down to a specific library.
Results

Hovering over individual codes will display BOCES > District > School respectively

Click Request to start ILL procedure
**Requesting ILL**

Check the Responder box(es) you want to borrow from.

**NOTE:** the more copies you request the more boxes you can check. Up to 3 for 1 copy

# of copies you need

Borrowers information will show only on slips & detail of ILL (optional)

Public note as needed

Private note as needed show only in detail of ILL & packaging slips

Date Needed By (optional will use default)

Click to complete request

Confirmation ILL ID and list of emails sent.

ILL ID is important as it drives the process of the item.
Responding to an ILL Request

It’s recommended to check ILL Requests once a day. Login to OPALS.

Click ILL > ILL Responses to fill an ILL. The SCOOLS union Login Screen will appear. You are logged in as admin.

Your school should appear. Responses already highlighted.

Login. Your school & library should be filled in automatically. If not filter down to it & Login.

Click ILL ID to respond.

OPEN: a response is needed.
Responding to an ILL Request Con’t

<table>
<thead>
<tr>
<th>ILL ID:</th>
<th>View</th>
<th>Previous</th>
<th>Next</th>
<th>Show: all ILLs</th>
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- **Status:** open
- **Copies Requested:** 1
- **Title/Description:** The Rose in our Stars
- **Author:** Green, John
- **Call Number:** F Gre
  - F Gre
  - F Gre
  - F Gre
- **Requester:** Otsego Northern Catskills BOCES School Library System (SL)
  - Borrower: Cheryl Miller (ID: P1)
  - Requested by: Cheryl Miller
  - Requested on: 2015-06-19 at 15:31:38
  - Expiry date: 2015-06-30
- **Responder(s):** Otsego Northern Catskills BOCES School Library System (SL)
  - Requested on: 2015-06-19 at 15:31:38 by Cheryl Miller

**History:**
- Request date: 2015-06-19 15:31:38
- Requestor: Cheryl Miller
- System: Otsego Northern Catskills BOCES School Library System (SL)

**Loan List:**
- **Loan ID**
- **Responder**
- **Call Number**
- **Barcode**
- **Loan Date**
- **Due Date**
- **Receipt Date**
- **Lost Date**
- **Status**

**Note if needed**

- **Fill**
- **Scan item barcode(s) you are loaning**
- **Select Due Date (default 30 days if not changed)**
  - As Needed
  - As Needed

**Print Slip**

- **Needed # of copies:** 1
- **Select Loan by Scanner:**

**Select Box(es) to print packing slip**
Responding to an ILL Request Con’t

Print Package slip. ALWAYS travels with an item

** You can now logout of SCOOLS. The ILL loan transaction will automatically be circulated in your OPALS

Name of school requesting ILL
Receiving a requested ILL item

In OPALS loan the ILL to the patron

To begin select ILL > Add ILL Temp Record

Scan (or type) ILL ID from Packing Slip

Load ILL MARC editor

- blank
- by ILL_id/Loan ID [3848]

Load

Enter item(s) Barcode(s)

OR ILL Loan ID (in blue) can be used

Save New Record

Complete the loan in OPALS circulation. Using the Temp record you just created
Returning an ILL item

In OPALS return ILL item as usual.

NOTE: Future upgrade to alert as ILL Transaction

Return ILL item in SCOOLS

Enter ILL ID or Loan ID or Barcode

Review & Continue

Return
Returning an ILL item Con’t

Select box(es) of items begin returned OR scan ILL ID

Public Note:

Private Note:

Status will change from “Filled” to “Returned (in transit)"
Receiving an ILL back to your library

Mark ILL item “Received” when it is returned to your library. This will “close” the ILL transaction.

Login into OPALS.

Select ILL > Responder-Received

Enter ILL ID or Loan ID or Barcode

Review and Continue
Receiving an ILL back to your library Con’t

Select box(es) of items begin returned OR scan ILL ID

Status will change from “Returned (in transit) to “Received”

ILL Loan will automatically be returned in OPALS