

SOP: Interlibrary Loan Process and Documentation

This SOP defines the **interlibrary loan process and documentation**, detailing the procedures for requesting, processing, and fulfilling loan requests between libraries. It covers eligibility criteria, request submission, verification, loan period management, handling of borrowed materials, documentation standards, and record-keeping practices to ensure efficient and accurate exchanges while maintaining accountability and protecting library resources.

1. Purpose

To establish a standardized process for requesting and providing materials through interlibrary loan (ILL) services, ensuring timely, accurate, and accountable transactions between participating libraries.

2. Scope

This procedure applies to all library staff involved in the interlibrary loan process, including requestors, processors, and fulfillers, as well as any other library personnel responsible for documentation and record keeping.

3. Definitions

Term	Definition
Interlibrary Loan (ILL)	The process by which one library borrows materials from another on behalf of its patrons.
Borrowing Library	The library requesting materials from another library.
Lending Library	The library providing materials requested by another library.

4. Eligibility Criteria

- Only registered patrons in good standing may request ILL services.
- Eligible materials include books, articles, and other loanable items not available within the local collection.
- High-demand, reference, or special collection materials may be exempt from loan.

5. Request Submission

- Patron submits an ILL request using the designated online portal or paper form.
- Required information includes: patron contact details, item title/author, publication information, and reason for request.
- Library staff verifies request form for completeness and patron eligibility.

6. Verification and Processing

- Staff checks the local catalog to confirm the item is not available in-house.
- If unavailable, request is entered into the ILL management system and sent to potential lending libraries.
- Receipt of loan confirmation or rejection is monitored; patron is notified of progress as needed.

7. Loan Period Management

- Lending library sets the loan period and any special conditions or restrictions.
- Borrowing library informs the patron of the borrowing period, due date, and renewal possibilities/restrictions.
- All communications regarding renewals must be documented in the ILL system.

8. Handling of Borrowed Materials

- Upon receipt, borrowed item is inspected for condition and processed for patron pickup.
- Patron must sign acknowledgement of receipt and agree to comply with lender conditions.
- Return of borrowed materials must be within the designated loan period; overdue items are followed up per policy.

4. Any damage or loss is reported immediately to the lending library, with documentation filed.

9. Documentation Standards

1. All ILL activities (request, approval, shipping, receipt, return) are logged in the ILL tracking system.
2. Physical forms, receipts, and correspondence are retained in accordance with library records policies.
3. Data privacy and confidentiality must be maintained at all times.

10. Record-Keeping Practices

1. Maintain accurate records of all transactions for a minimum period (e.g., 1 year), as per institutional or legal requirements.
2. Periodically audit records for completeness and compliance.
3. Securely dispose or archive sensitive documentation according to library policies.

11. Responsibilities

Role	Responsibility
ILL Coordinator	Oversight of ILL process, documentation, and quality control.
Library Staff	Processing requests, communication, and handling materials.
Patrons	Submitting accurate requests and complying with borrower conditions.

12. Review and Revision

1. This SOP will be reviewed annually and updated as needed to reflect changes in policy, technology, or best practices.

13. Appendices

- Sample ILL Request Form
- Sample Loan Agreement
- Contact List for Participating Libraries