

## **New ILL Procedure**

ILL numbers have been drastically higher from the ILS than they have been reported by DPI. DPI keeps track of ILL circs via WISCAT. When staff “renew”, i.e. perform charge-on-charge in CARL, for extending a patron's checkout, this adds additional circs to the ILS data, but not in WISCAT. We have also been lumping ILL-WISCAT and ILL-Other into the same category for circs. These should be kept separate as the “Other” circs are not being counted through WISCAT. OWLS staff have created a new procedure for ILL circs.

### **Changes/Additions**

OWLS staff have added in an additional ILL card for those transactions specifically coming from WISCAT, “ILLWIS”. The original card type, “ILLOTH” will remain in the ILS for those ILL transactions not coming from WISCAT. Example: filling requests that come through via email from Winnefox.

OWLS staff have also added in a new media code “ILLW” for WISCAT items and have updated the current media code “ILL” to “ILLO” for the “Other” ILL requests.

### **Steps for Circulation**

When a request comes in for ILL, staff need to verify if it is a WISCAT request (coming directly through WISCAT) or through other means (email, etc...). Please follow your local procedure for ILL while including the additional CARL steps below.

#### **WISCAT Request - Borrowing**

1. Fulfill the request via WISCAT as you normally would.
2. In CARL, update the item media code to “**ILLW**”. \*This code will remain in the record until staff manually change it to something else.
3. When a renewal is requested and fulfilled in CARL (charge-on-charge), please input the information into the shared document, [ILL Renewal Counts 2023](#) into the “**WISCAT Renewal Counts**” tab.

#### **WISCAT Request - Loaning**

1. Fulfill the request via WISCAT as you normally would.
2. Check the item out to the ILL account verifying it is a “**ILLWIS**” patron card type.
3. In CARL, update the Preferred Branch and Home Agency to match that of your library. \*If it doesn't match already.
4. When a renewal is requested:
  - a. PLEASE use the Charge function to pull up the patron account
  - b. Click on the override due date box and choose the new date
  - c. Scan the item barcode
  - d. CARL will inform you the item is already charged to this borrower, click **Renew Item**.
4. Please input the information into the shared document, [ILL Renewal Counts 2023](#) into the “**WISCAT Renewal Counts**” tab.

### **ILL-Other Request - Borrowing**

1. Fulfill the request per your local procedures.
2. In CARL, update the item media code to **"ILLO"**. \*This code will remain in the record until staff manually change it to something else.
3. When a renewal is requested and fulfilled in CARL (charge-on-charge), please input the information into the shared document, [ILL Renewal Counts 2023](#) into the **"Other Renewal Counts"** tab.

### **ILL - Other Request - Loaning**

1. Fulfill the request per your local procedures.
2. Check the item out to the ILL account verifying it is a **"ILLOTH"** patron card type.
3. In CARL, update the Preferred Branch and Home Agency to match that of your library. \*If it doesn't match already.
4. When a renewal is requested:
  - a. PLEASE use the Charge function to pull up the patron account
  - b. Click on the override due date box and choose the new date
  - c. Scan the item barcode
  - d. CARL will inform you the item is already charged to this borrower, click **Renew Item**.
5. Please input the information into the shared document, [ILL Renewal Counts 2023](#) into the **"Other Renewal Counts"** tab.