Is there a way in WorldShare to refund an institution for a closed request?

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Applies to

• WorldShare Interlibrary Loan
• Tipasa

Answer

Yes, refunds can be issued for requests that used IFM to charge a borrower. This works with any status after Considering, including Closed requests.

For example, if you (the Lender) billed a Borrower by accident, you can go into your closed requests and refund the amount.

To issue a refund:

1. Locate the request you want to refund.
2. Send an email to the Borrower to let them know you are refunding the request.
3. At the top of the request, under Actions, click Refund.
4. Click Refund.
5. A confirmation message appears and the Refund button turns gray.
6. To confirm the refund, click the Request History accordion at the bottom of the request to view the ILL Fee Management (IFM) History details.

If you have been erroneously charged for a requested item, you can request a refund from the Lender by using the Email button on the request.

To request a refund:

1. Locate the request you want to request a refund for.
2. At the top of the request, under Actions, click Email.
3. On the Send Message window, fill in the fields.
4. Add some text to the e-mail to let the Lender know you want to request a refund for that specific request.
5. Click Send.

Note: You can only issue refunds through the system interface. Refunds must be issued within 180 system days of the original transaction. Non-IFM charges cannot be refunded through the system.
Additional information

For additional information, please see Issue an IFM refund.