IFM Frequently asked questions

Last updated: Thu, 10 Oct 2019 14:11:29 GMT

Find answers to frequently asked questions about IFM and UnityUK. The following FAQs will hopefully answer any questions or concerns regarding the IFM project. Please click here to download a presentation explaining the background to the project. If you have any further questions that are not answered in this section, please contact OCLC Support.

Who is eligible to use IFM?

The assumption is that most UnityUK members belong to one or more payment groupings that have arranged a fix price for requests between their members:

CONARLS, LinkUK, SWRLS, LIEMS, NWLIP, SINTO, CoSouth, etc

Any given ILL transaction between 2 UnityUK members is liable to be covered by more than one mutual payment group membership. The borrower will be charged (and the supplier credited) by the lowest rate that applies to both parties for the given request. OCLC will endeavour to ensure that correct pricing information is entered in UnityUK but this is dependent on charging information provided by libraries/regional bodies/cost schemes. The borrower will also be charged a handling fee of 50p per IFM transaction (this changed from 30p on 1st July 2014).

Who is eligible to use IFM?

All UnityUK libraries who are registered for the "Integrated Service" will be able to receive IFM invoicing. Both parties to any transaction will need to be "Integrated Service" members for the transaction to be included in the IFM statement.

How do we participate in IFM?

It is possible for authorities to either opt-in or opt-out of the scheme. Please contact support-uk@oclc.org for further information.

When replying 'shipped' on bulk action, the price doesn't appear. If we put it in i.e £5.30, will there only be one charge or will each item be charged? *

If you take the Bulk ship action on your requests the correct price will be applied to each request based on the information configured on the system.

I was unaware that you will be charging 50p per IFM transaction-how does this compare with BL? Do they charge the same?

The 50p IFM charge is equivalent to the 70p BL Charge (since May 2010). For the IFM transactions - if both libraries are fully integrated UnityUK members and are both participating in IFM - then the ILL request price will be issued at the Shipping stage. If the ILL transaction amount is zero (e.g. for SWRLS-SWRLS transactions) then the IFM process will
disregard these requests and therefore a 50p charge will NOT be issued in these instances. The system will top up all the debits and credits on the monthly statement.

The IFM handling fee is a necessary administration charge for producing and issuing the IFM statement to participating customers. Please note if you do an Unshipped action as a Lender you will attract a 50p debit charge on the ILL transaction. This will be visible as a line in your IFM Monthly Report.

**Will the IFM Fee management system work like the current BL Accounts system? We supply far more books than we request so we are always in credit. We allow so much credit to remain in our account but we receive BACS payments on a regular basis. Will we receive BACS payments from you in your role as 'banker'?**

If you are in credit at the end of the month and would like payment direct to your account (by secure electronic transfer) - please send the following information to our [UK Support Desk](mailto:UK.Support.Desk@oclc.org):

- Bank Account Name
- Bank Account Number
- Sort Code
- Any Reference if required

**When a responding library sends the wrong book by mistake - the requester does not want to pay for the wrong item. Does IFM have a facility to not charge for such a loan, or could it?**

For the purposes of IFM Billing the Unship action is available to ‘undo’ inappropriate IFM charges where payments may have been made in error. If the Lending library accidently marks the wrong requests as being Shipped – triggering an unnecessary payment – the Lender can now take the unship action. You can choose the Unship action from the hitlist display of results following a request search or from the Shipped borrower work queue status.

**Do I still need to download the BL Claim form for responders and send my claims to the British Library?**

The BL Claim form has been updated so that it ignores any requests that have gone through IFM. There is a list made available on the Members' area to show which locations are participating in IFM. Note - if all Full Service members sign up to IFM it will not be necessary to send the BL Claim Form.

**Should I be manually checking my ILL transactions?**

You shouldn't need to check your IFM reports, the workflow will match what you are doing now - so no extra work should be involved, as this sample workflow describes:

- UnityUK IFM (invoice) - receive credit/debit info
- UnityUK - non-IFM - check BL claim form (if all Full Service members sign up this will not be necessary)
- Non-UnityUK - maintain own spreadsheet/method as before and send claim to the BL
- BL invoice - BL are not currently an IFM participant so these transactions remain outside of IFM and should be processed as normal
What do we do when the responder has got the price incorrect for the item?

If you think the price indicated on UnityUK or in your IFM invoice or IFM Report is incorrect please contact OCLC Support. All cost scheme information has been configured on the system with appropriate membership. The system will always select the lowest possible price from the available cost schemes per transaction. Please note - it is possible for the Lender to edit the price on the Shipped screen in order to recoup postage costs.

Can I offset my IFM credits against my UnityUK subscription?

Any lending credits that you receive can be offset against the cost of OCLC products and Services, for instance you could put them toward paying your UnityUK subscription. Alternatively lending credits can be paid back direct to your library via electronic (BACs) payments (see above).

Last updated 29/03/16 - Annie Charlton