Manage IFM


Borrow with IFM

When using IFM with Borrowing, it is important to keep the following considerations in mind:

IFM Borrowing Fees Are Charged When Item Ships

When a lending library receives your request and fulfills it, your IFM account will be charged when the lending library clicks Shipped. This will only occur when an IFM-enabled lending library supplies your request.

IFM History Displays in Individual Requests

After a request has been filled, you can review the IFM payments associated with the request in the Request History, ILL Fee Management (IFM) History section of the given request. The IFM history section of the screen will show notifications about the IFM payment, including the amount debited from the borrower for the request and the supplier. See IFM Borrowing Messages below for more detail about these messages.

IFM Borrowing Message

The following messages may be displayed in the ILL Fee Management (IFM) History section of a borrowing request.

<table>
<thead>
<tr>
<th>TRANSACTION MEANING</th>
<th>MEANING</th>
</tr>
</thead>
<tbody>
<tr>
<td>IFM Payment - #.##</td>
<td>The amount in the currency that has been charged to your account by the lender. This message will appear after the lender has clicked Shipped. After the payment has succeeded, a supplier column will be added to the History panel with the lending library’s OCLC symbol.</td>
</tr>
</tbody>
</table>

ILLiad and IFM Refunds

Borrowers who use ILLiad to process interlibrary loans with IFM may also see a message alerting the borrower that the supplier has changed the request’s status from Shipped to Unshipped. This change in status will result in an automatic IFM refund by the system.
Lend with IFM

When using IFM with Lending, it is important to keep the following considerations in mind:

**Payments Are Triggered on Ship Action**

When a lending library updates a request’s status to **Shipped**, by responding **Yes** to Can You Supply?, the borrowing library will automatically be charged for that item.

**IFM Lending Charges Must Match the Borrower’s Settings**

When a lender submits an IFM eligible request as **Shipped**, the system will perform IFM validation checks and warn the lender if an expected IFM charge cannot be processed due to one of the following problems:

1. The lender has set their IFM flag but the borrower has not.
2. The lender’s ILL charge is greater than the borrower’s state max cost.

The lender can take two actions if this warning is generated:

1. Proceed with the **Ship** action (click **Update** twice), agreeing to the Borrower’s terms, which include the maximum cost and method of processing payment for that request.
2. Abandon the current **Ship** action (click **Cancel**), and respond **No** or **Conditional** to the request.

These checks are also performed when a lender performs a **Bulk Shipping** action. Any requests that fail the IFM validation checks will not be included in the Bulk Action and will be listed in the post-bulk action status report that appears on screen after a bulk action has been performed.

**IFM History Displays in Individual Requests**

After a request has been filled, you can review the IFM notifications associated with the request in the **Request History**, **ILL Fee Management (IFM) History** section of the given request. The IFM history section of the screen will show notifications about the IFM payment, including whether the payment has cleared, the amount of the payment, and error messages if the payment cannot be completed. See IFM Lending Messages below for more detail about these messages.

**IFM Lending Messages**

The following messages may be displayed in the ILL Fee Management (IFM) History section of a lending request:

<table>
<thead>
<tr>
<th>MESSAGE</th>
<th>MEANING</th>
</tr>
</thead>
<tbody>
<tr>
<td>IFM Payment Pending</td>
<td>The system is processing an IFM payment in response to the recent Ship action.</td>
</tr>
<tr>
<td>IFM Payment</td>
<td>The system has successfully processed the IFM payment for this request—this includes the amount credited to the lender.</td>
</tr>
</tbody>
</table>
Something has prevented the system from completing the IFM Payment successfully. Possible reasons for an IFM payment not to proceed as expected are:

- The borrower had not set their IFM flag in the request.
- The lender’s charge exceeds the borrower’s max cost.
- The system has been unable to contact the IFM service so an IFM payment could not be made for this request.

### Issue an IFM refund

As a Lender, you can issue refunds for IFM transactions that were made in error. Refunds can be issued for requests 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. Refunds can only be issued for the total amount of the lending charge. Lenders cannot issue partial refunds. If you are a Borrower and have been charged by accident, you can send an email to the Lender to ask them to refund the charge. See Issue a refund (Lender) and Request a refund (Borrower) below for more information.

You may want to issue a refund if:

- You responded Yes to a request, but then discovered you could not supply the item.
- You used the wrong constant data for a request.
- You accidentally charged the Borrower (for example, you did not realize the Borrower is part of your mutual reciprocal program).

**Note:** You can only issue refunds through the system interface. Refunds must be issued within 180 system days of the original transaction.

- **If you are an ILLiad library** - You can continue to use the Undo Shipped functionality within the ILLiad interface. However, if you have inadvertently charged a library outside of the Undo Shipped scenario, you need to log into your WorldShare Interlibrary Loan account in order to issue a refund.

- **If you are an ISO ILL lending library (e.g., those using Auto-Graphics SHAREitTM, Relais ILL, VDX®, WorldCat Navigator®)** - You need to "de-ISO" the request in order to issue a refund. Note that if you "de-ISO" an ILL transaction, you will no longer be able to use your ISO ILL system to update that request.

### Issue a refund (Lender)

Follow the below instructions to refund a request in WorldShare Interlibrary Loan. The Refund button only appears on requests that can be refunded (when IFM has been invoked). **Note:** You cannot undo a refund.

**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.

### Request a refund (Borrower)

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. Click **Send**.