Inter-Lending and Document Supply (ILDS) Good Practice Guidelines

Knowledge for Healthcare Strategic Inter-Network Collaboration (SINC) Group
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These guidelines should be used in conjunction with any regional/local guidelines.

Contents

1. General principles

ILDS services should be operated with the following in mind:

- Striving for excellent customer service
- Optimal use of NHS owned resources
- Cost effective, e.g. using free sources before costed ones, but also taking into account staff time
- Digital by default
- Streamlined, making use of shared and interoperable systems where possible
- The CLA Licence and copyright legislation
- Data protection legislation

2. Copyright

See the copyright webpage[1] on the NHS Library Services website for guidance on when you can supply copies under the CLA Licence, when to supply copies under Library Privilege, and when to obtain copyright fee paid copies. See also appendices A and B below.

Remember that Library Privilege overrides publisher licences, so libraries may supply single fair copies to other libraries from any copyright work, provided an end-user declaration is obtained.

3. Data protection

Data protection principles – in particular the General Data Protection Regulation[2] – must be observed when processing personal data for ILDS purposes. Check with your trust/organisation lead for guidance on data protection to be sure that you are abiding by the principles.

4. Searching for items

Taking into account the general principles above, the choice of sources may be as follows, although the order in which to approach them will vary according to local arrangements. When approaching specific libraries in your own network or others, take note of any temporarily unable to supply.

1. NICE A-Z list of journals or your local library management system/discovery system.
2. Any local collaborative network.
3. Other collaborative networks:
    - Other geography-based collaborative networks – details of the INC scheme.[3] Check this webpage to be sure that the library from which you are requesting is participating in the INC scheme.
    - Subscription-based collaborative networks such as NULJ[4] and PLCS[5]

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[1] https://www.libraryservices.nhs.uk/forlibrarystaff/information/nhs_copyright.html

[2] https://ico.org.uk/for-organisations/guide-to-data-protection/guide-to-the-general-data-protection-regulation-gdpr/

[3] https://kfh.libraryservices.nhs.uk/resourcediscovery/inter-lending-and-document-supply-ilds/

[4] https://www.nulj.uk/

[5] http://www.plcs.nhs.uk/login.asp?ref=/Default.asp

4. [HealthILL](#)[6] and [LIS-ILL](#)[7] mailing lists.
5. Costed services for Library Privilege such as the BL.
6. Costed services for Copyright Fee Paid such as Reprints Desk, the BL, and the Royal Society of Medicine (Reprints Desk are able to supply e-pubs).

Copyright fee paid articles can be shared in the same way as articles supplied under the CLA licence, i.e. in cases where both the user is eligible under the licence and the publication is covered by the licence. The [decision tree](#)[8] is a helpful guide.

Do not use LIS-MEDICAL. Use general mailing lists only if permitted on those lists, and only as a last resort.

When selecting locations within networks, where all else is equal, select locations equitably and not always 'the first in the list'.

5. Responsibilities of the requesting library

Ensure all details of the request are correct and complete before submission.

For journal articles:

1. Full citation details (or commonly understood abbreviations)
2. First author
3. First few words of the title

For books, as a minimum:

1. Author
2. Title
3. Year
4. Edition (if applicable)

For all requests:

- Your library code
- Your collaborative network name (if applying to another network)
- Your e-mail address
- Your full postal address
- Request number (if required for library management systems)
- The date the you are placing the request

For data protection reasons, do not include the requester's details.

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[6] https://lists.libraryservices.nhs.uk/cgi-bin/mailman/listinfo/healthill
[7] https://www.jiscmail.ac.uk/LIS-ILL
[8] https://www.libraryservices.nhs.uk/forlibrarystaff/information/nhs_copyright.html

Unless you use a shared request management system, send requests via e-mail. Include a clear indication in subject line that it is document or loan you are requesting. Urgent requests may be made by phone but use discretion when describing requests as urgent.

If you need more than three requests from the same library at the same time, contact the library before applying to discuss, unless there is already an arrangement in place.

Do not:

- Make requests that would infringe copyright if supplied. If a declaration is required for the copy being requested, it is your responsibility to obtain this. Unless you know that the copy will be supplied under the terms of the CLA Licence, it is safest to assume that a declaration is required.
- Request any article that you are able to access electronically, unless for any reason you cannot access it yourself within the required timeframe.
- Create a digital copy of a print article if there is an electronic copy available and accessible within the required timeframe in the NHS in England (in order to comply with the CLA licence).
- Request multiple copies of single items.
- Assume that book loans will be renewed.
- Apply to more than one library in more than one collaborative network on the same request (individual network protocols may vary).

Do:

- Request items which are included in journal bundles from *your own network* before approaching libraries in other networks.

6. Responsibilities of the supplying library

Requests should be processed as soon as possible after receipt, preferably within 48 hours, and certainly no later than five working days. If you are unable to supply, or there will be a delay, let the requesting library know as soon as possible and the reason. Supplying libraries reserve the right to decline a request but should provide a reason.

Supply articles electronically.

Include the correct copyright statement with the copy supplied, so that the requesting library can forward this to their customer (see appendix B).

Where post must be used, second class post is assumed. Items should be sent in secure, protective and clearly addressed packaging. Do not use staples.

7. Responsibilities to customers

Ensure your customers understand the proposed timescales involved and are kept informed about the status of their requests.

Ensure your customers know whether/how they may share/store the copies that you supply by ensuring the correct copyright statement is attached.

8. Book renewals

Book renewals are at the discretion of the supplying library, or in accordance with regional/local inter-lending arrangements if specified in the regional/local guidelines.

9. Lost or damaged items

If the loss occurs during transit from the supplying library to the requesting library, the supplying library should assume responsibility for the loss.

If the loss occurs whilst the item is on loan to the customer, or during transit back to the supplying library, then the borrowing library (or their customer) should assume responsibility.

Given the costs involved in raising invoices network libraries should not invoice each other in respect of lost, damaged or overdue books. In the interests of good network relations, the library responsible for the loss of a book should contact the lending library about the preferred arrangements for replacement or compensation.

Other arrangements may apply within individual networks.

10. Responsibilities to your network and other networks

Ensure the following are accurate and comprehensive:

- Your book and journal holdings on your local/regional LMS and/or union catalogue
- Your journal holdings in the link resolver
- Your library details on HLISD
- Your status information where appropriate (e.g. closures/unstaffed periods/special arrangements)

Maintain statistics for local and national purposes and use them to benchmark activity.

Appendix A: Useful links / contacts

Copyright
Email address for the copyright First Responders[9] - Each region has one or more **'Copyright First Responders'** - library staff who can help with copyright queries.

Regional groups/experts where they exist
Joint Interlending and Document Delivery Group[10] (KSS)
Pan Northern Document Delivery Agreement Group[11] (PANDDA)
SWIMS Network ILDS group[12] (SWIMS Network)

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[9] nhscopyrightqueries@libraryservices.nhs.uk
[10] http://www.ksslibraries.nhs.uk/groups-jilddg.html
[11] https://www.lksnorth.nhs.uk/resources/union-list-of-journals/pandda-group/
[12] http://www.swimsnetwork.nhs.uk/groups/ilds-group/

Appendix B: End-user declaration and copyright statements

End-user declarations (for copies that will be supplied under the Library Privilege)

I declare that:

   a) *I have not previously been supplied with a copy of this by you or any other librarian;*
   b) *I will not use the copy except for research for a non-commercial purpose or private study and will not supply the copy to any other person; and*
   c) *to the best of my knowledge, no other person with whom I work or study has made or intends to make, at or about the same time as this request, a request for substantially the same material for substantially the same purpose.*

I understand that if the declaration is false in a material particular, the copy supplied to me by you will be an infringing copy, and that I shall be liable for infringement of copyright as if I had made the copy myself.

Statements for library staff to use with supplied copies

Copies supplied under the NHS CLA Licence:

"This copy has been supplied to you under the terms of the NHS England CLA Licence. You may store your own copy (e.g. on your personal drive or own PC), and make further copies for other NHS colleagues. You may put it on an intranet page but not place it on the internet. Thank you for your co-operation."

Copies supplied under the Copyright Act, a Publisher Licence, or obtained from the BL, BMA or another non-NHS library:

"This copy has been supplied to you under the terms of the Copyright Act. It is for your personal, non-commercial use only. You may not make further copies. Thank you for your co-operation."

Appendix C: References

IFLA (2015) *Guidelines for Best Practice in Interlibrary Loan and Document Delivery.* The Hague: IFLA. [Online]
https://www.ifla.org/files/assets/docdel/documents/guidelines-best-practice-ill-dd-en.pdf
[Accessed 03/04/2018].
Streamlining document supply task and finish group 2015-7