

OL Chat Reference Service & Staffing Guidelines

July 5, 2002

I. Purpose of Guidelines

These guidelines are intended to facilitate quality and consistency in service from librarian to librarian and institution to institution, and to outline the responsibilities of participating librarians.

II. Scope of Service

- A. The only users served by this service are the students, faculty and staff of OhioLINK member institutions, and visitors to OhioLINK libraries' campuses. All users from outside OhioLINK libraries' campuses will be authenticated.
- B. Types of questions answered
 - 1. Ready reference will be answered, given resource availability, and are appropriate for this service.
 - 2. Reference inquiries involving instruction will be answered in a reasonable manner given the limitations of the medium.
 - 3. Instructions on how to view one's own circulation record within any of the OL institution's catalogs will be expected, but this service will be unable to look-up patron records and will refer all questions about specific patron records to local institutions.
 - 4. Individual institutions' periodical holdings will be interpreted as much as reasonable, but for detailed holdings information the user may be referred to the local institution.
 - 5. Librarians should use their own discretion and professional judgment and refer users to their local libraries when the librarian determines that the question cannot be reasonably answered using this service.
 - 6. When dealing with legal or medical information, the source of the information should be cited and no attempt made to interpret the implications or to influence the user's subsequent behavior.
- C. Librarians may demonstrate the service to individuals or groups, and are asked to:
 - 1. Immediately identify themselves and their purpose
 - 2. Not ask "fake" reference questions
 - 3. Inform the chatref list of the day(s) and approximate time(s) of extensive demonstrations.
- D. Use in a classroom situation should be restricted to a demonstration. Given the limitations of our staff, having an entire class start a chat session is discouraged.

III. Scheduling

- A. There will be a scheduling coordinator in charge of scheduling for the entire consortium.

- B. When only one librarian from a particular library wishes to participate, it will be beneficial, in terms of replacements and coordination, for that librarian to become part of a larger group of participating librarians (e.g. CONSORT librarians).
- C. There will be a coordinator for each library/library group who is in charge of the scheduling for that library (see section X on Local Digital Reference Coordinators below).
- D. The schedule will be done quarterly.
- E. The campus coordinator for each library/group will be asked to sign up for the shifts they want.
- F. There will be at least 2 libraries assigned to each shift (therefore, at least 2 librarians on duty at all times).
- G. After campus coordinators sign up for the times they wish to staff, the central coordinator will send a list, to the Internet mailing list, of the shifts that still need to be staffed.
- H. If not enough libraries volunteer for some shifts, those shifts might not be staffed.
- I. It is the responsibility of the scheduling coordinator to post the completed schedule, making librarians and users aware of hours of service.
- J. The finished schedule will be posted on the web, as well as being sent to the Internet mailing list.
- K. Times that will be covered by the service (according to the grant proposal)
 - 1. Fall, Winter & Spring (mid-August to mid-June)

Monday - Thursday	9 am - 10 pm
Friday	9 am - 5 pm
Saturday	1 pm - 5 pm
Sunday	1 pm - 10 pm
 - 2. Summer schedule (mid-June to mid-August)

Sunday-Thursday	1 pm - 8 pm
Friday	1 pm - 5 pm
Saturday	Closed
 - 3. Holidays we won't be open
 - New Year's Eve after 5 pm
 - New Year's Day
 - Memorial Day
 - Independence Day
 - Labor Day
 - Thanksgiving Eve after 5 pm
 - Thanksgiving Day
 - Day after Thanksgiving
 - Christmas Eve after 5 pm
 - Christmas Day

IV. Staffing

- A. All participants are required to subscribe to CHATREF@ohiolink.edu. This mailing list is used for scheduling, training, tips, etc.
- B. Shifts will be assigned to a library/group, not to a person.
 - 1. Shifts will be 2 or 3 hours long.
 - 2. The schedule will list specific times for each shift to begin and end. Libraries/groups will not be able to make up alternative times for their shifts.
 - 3. Librarians should make every effort to be prompt in signing on for their shift so the librarian they're replacing is not inconvenienced.
 - 4. Librarians should stay signed on and available until their shift is completely over.
 - 5. If a librarian's shift is done and no other librarian has signed on for the next shift, the librarian is not required to stay on duty.
- C. Finding a replacement is the responsibility of the library/group, as shifts are assigned to libraries/groups, not to a person.
 - 1. If the library/group is unable to cover an assigned shift with its own staff, a request should be sent to the chatref mailing list for another librarian to staff the shift.
 - 2. The problem should be referred to the central coordinator only if the library/group is unable to find a substitute.
 - 3. The commitment to work a shift is just as important as the commitment to work a shift at a library's reference desk.
 - 4. Librarians should report no-shows to the chatref@ohiolink.edu discussion list.
- D. Participating librarians
 - 1. A participating librarian can be a librarian or a staff member with experience working at the reference desk.
 - 2. All participating librarians must have been trained to use the OhioLINK chat reference software.
- E. Because traffic patterns are not yet discernible, it is highly recommended that the service be staffed away from the reference desk.

V. Responses

- A. Calls should be answered as quickly as possible.
- B. Librarians will identify themselves with a name and institutional affiliation.
- C. Chat netiquette for librarians (adapted from LSSI and LivePerson documentation)
 - 1. Most often, non-scripted information should be sent in small pieces, not large paragraphs. This facilitates communication and reduces delay time.
 - 2. Responses shall include an explanation of the librarian's search process or strategy when possible.
 - 3. The librarian shall be friendly.

4. The librarian shall try to let the user know what he or she is doing approximately every minute - so that the user does not feel abandoned. If the librarian must be away from the transaction, he or she should send something for the user to review or read until the librarian's quick return.
 6. The appropriate use of spelling, grammar, punctuation & capitalization is expected. Striking a balance between speed and professionalism while also adapting to the customer's comfort level with the medium is also appropriate.
- D. Appropriate use of scripts, bookmarks, etc. is expected and can help with speed.
 - E. All resources quoted or used in responses shall be fully cited.
 - F. Appropriate patron behavior is expected and if unacceptable patron behavior is encountered, librarians may end the call.
 - G. This service is intended to supplement our existing reference services and it may often be appropriate to suggest to the patron that his or her home institution's reference services would be the best place to seek reference assistance.

VI. Recommended length of transactions

- A. Librarians will strive to answer questions in approximately 15 minutes. However, this will often be an insufficient amount of time to provide a complete response. Librarians are expected to be aware of others waiting for assistance and responses that are too complex for the medium. In these instances, librarians are expected to either get the user started and ask that he or she return with more questions, ask the user if it would be o.k. to follow-up with him or her by email, or to follow the referral procedures below.

VII. Appropriate resources for responses

- A. Since all users will have already been authenticated or will be located on a computer on an OhioLINK libraries' campus, each will have access to the OhioLINK databases.
- B. Databases provided by the users' institution might also be used, especially if the librarian also has access to this resource.
- C. Quality free web sources may also be used when deemed appropriate by the librarian.
- D. Access to OhioLINK libraries' catalogs, web sites, local contact information and other resources will be conveniently available at <http://adler.lib.muohio.edu/~bbarr/webrefinfo/index.html>

VIII. Referrals

- A. Situations needing referral to other librarians/libraries
 1. Response involves detailed information specific to the user's institution, such as periodical holdings details or patron record

information, or institutional policies not commonly answered or located by online librarians.

2. Response involves information or resources that might be handled better by libraries with particular materials or resources, or by librarians who have defined a particular digital reference subject queue.

B. Method of referral (in priority order)

1. If a librarian from the particular institution is available online, the call should be transferred to that librarian.
2. The patron will be pointed to the contact information for the particular institution or to the available hours of a particular digital reference subject queue.

IX. Local Digital Reference Coordinators

A. Each campus or group of participating librarians shall have a local coordinator. The name, email, phone number, and institution(s) this person is representing shall be given to OhioLINK.

B. Local coordinators may have administrative access to statistics, transcripts, monitoring and other functions or information.

1. Before monitoring any transactions, coordinators and administrators MUST ask for and be granted permission by the librarian. When monitoring a transaction in progress, past communications are not available to the monitor.

C. Responsibilities of the Local Coordinators

1. Scheduling of librarians within their campus/group.
2. Substitutions within their campus/group.
3. Coordination of substitutions outside of their campus/group.
4. Creation and maintenance of logins for librarians within their campus/group.
 - a. The naming convention for participating librarians will be lastname.firstname
5. First line of support for non-urgent technical support and the reporting of verified problems to support@ohiolink.edu, chatref@ohiolink.edu and to Digi-Net (see section XII below).
 - a. When reporting problems to the OhioLINK lists, please be as specific and complete in your report as possible.

X. Support

A. Technical Support

1. Urgent problems, such as the OhioLINK server not responding, shall be reported immediately to the OhioLINK hotline at 614-728-3600.
2. Non-urgent problems should be reported to your local coordinator. Once verified, these problems should be reported to chatref@ohiolink.edu (see section X.C.5.a. for more information).

- a. Problems that may involve the OhioLINK chat reference server should be reported to support@ohiolink.edu.
 - b. Technical glitches and bugs should be reported to Digi-Net at 1-352-333-3160. Support hours are M-F 8a-10p and S-S 10a-6p. When contacting Digi-Net, please identify yourself as a member of OhioLINK using the e-librarian software.
- B. Non-technical Support
1. Other support issues such as problem patrons, policy or procedure questions should be reported to chatref@ohiolink.edu.

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