

OL Digital Reference Service Guidelines
DRAFT - January 24, 2002

I. Purpose of Guidelines

These guidelines are intended to facilitate quality and consistency in service from librarian to librarian and institution to institution.

II. Scope of Service

- A. The only users served by this service are the students, faculty and staff of OhioLINK member institutions. All users are authenticated through OhioLINK authentication.
- 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. 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.

III. Responses

- A. Calls should be answered as quickly as possible.
- B. Staff will identify themselves with a name and institutional affiliation.
- C. Chat netiquette for staff (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, staff may end the call.
- G. Because this service is intended to supplement to our existing reference services, all transactions will end with the librarian sending information to the patron regarding the patron's home institution's reference services.

IV. Recommended length of transaction

- 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 or to follow the referral procedures below.

V. Appropriate resources for responses

- A. Since all users will have already been authenticated, each will have access to the OhioLINK databases.
- B. Databases provided by the users' institution might also be used, especially if the operator also has access to this resource.
- C. Quality free web sources may also be used when deemed appropriate by the librarian.
- D. The policies, resources and information of individual institutions to which librarians may commonly refer will be made conveniently available to librarians online.

VI. Referrals

- A. Situations needing referral to another librarian/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.

VII. Troubleshooting

- A. Depends on the software – will need to be developed.

Jan. 24, 2002