



Best Practices Document for Quality Chat Reference

Updated 5/7/18

Each year, Answerland's [Quality Team](#) requests that librarians send us transcripts that highlight the best of the best in chat reference. We use the "Rubric for quality chat reference" that follows to evaluate chat sessions. Since the rubric is very simple, we'd like to provide some in-depth Answerland chat reference best practices for new librarians, long-time Answerlanders, and volunteers. Please contact a member of the [Quality Team](#) with any suggestions or questions.

For more information on chat reference best practices, [see the end of this document](#).

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Rubric for quality in chat reference

A cheerful, welcoming tone

- Patrons should be picked up as quickly as possible. If more than one patron is waiting, pick up the patron that has been waiting the longest.⁴
- When you greet the patron, send a personal greeting, identifying yourself and your willingness to help.⁴
- Obtain or verify the patron's email address as soon as possible, if the need for follow-up is a possibility.⁴
- If on the 24/7 queue, be sure to indicate in the initial greeting that you are ready to help, as the patron may be confused when greeted by a non-local librarian. Identify the name of the library or group you are affiliated with, in order to set expectations with the patron.⁴
- **Examples: (all from 5)**
 - (*Librarian's screen name is 'Rob from [State] College'*): "Hi, I'm Rob, and I'll be helping you today. I'm reading your question now..."
 - (*After saying Hi, [patron name]*): "My name is John, and I am a librarian in [State]. I am helping your librarians answer chat questions. Let me read what you wrote to see how I can help you..."
 - "Hi, [patron name], I'm Nancy, a librarian at the University of Washington, and I'm happy to help!"
 - Consider combining your greeting with the initial reference interview question. Example: Patron Jane asks about locating a book. Librarian combines the greeting with a reference interview question: "Hi Jane, my name is Erin. Are you looking for a particular title?"

A note about multiple patrons:

Answerland encourages librarians to pick up one patron at a time. Only pick up the second patron if you are comfortable and proficient at handling more than one patron, such that the service you provide to either patron will not be impeded by picking up the second patron.⁴

- Some examples of possible times to pick up a second patron:
 - The second patron is one of your own local patrons.
 - You are almost at the end of the session with the first patron and can handle a second patron.
 - The first patron is reviewing information you have sent and does not need your immediate attention.⁴

If you decide to pick up a second patron:

- Acknowledge all patrons that you pick up as soon as possible by sending a greeting. Thank them for waiting, if applicable.⁴ Let them know that you are helping multiple patrons, that they may have to wait a short while for assistance, and that they have the option to ask for follow up or return to chat later.
- After sending a greeting, begin a reference conversation with the second patron (clarify the request, ask about previous searches, *etc.*). Ask as many reference interview questions of the second patron as necessary. This will give you time to finish up the first session, and the second patron will remain involved. The additional information will also help you refine your search and will provide necessary information to any librarians doing follow-up (if follow-up is needed).⁴
- Do not give a time estimate of how long it will be before you will be able to work on the question, unless the patron asks. If it seems likely that you will not be able to get to the second patron's question for more than a few minutes, try to transfer the session to another librarian.⁴
- If you are handling two simultaneous sessions, be sure to double-check that you are sending the messages and URLs to the appropriate patron.⁴

A good reference interview (asking clarifying questions)

- Use the library's [policy page](#) to find information. Often information found in the policy page is not freely available on that particular library's website (including database and catalog access).²
- Point patrons to their library's resources first.²
- Utilize scripts from the patron's library, not your own.²
- Ask open-ended questions to encourage the patron to expand on the request, *e.g.*:⁴
 - "Please tell me more about your topic."
 - "What additional information can you give me?"
 - "How much information do you need?"⁴
 - "What kind of information on ___ are you looking for?"
 - "Would you tell me more about ___?"
 - "Is there something specific about ___ that you would like to know?"
 - "What would you like to know about ___?"
 - "Can you give me an example?"

- Use questions to refine the search query, *e.g.*:⁴
 - "What type of information do you need (books, articles, *etc.*)?"⁴
 - "Do you need current or historical information?"⁴
 - "Is this for a school assignment? If so, can you tell me the grade level?"
- Find out where they have already searched.
- Add value to the information either through analysis, description, keywords, pathways, or rewording.⁴
- Clarify any confusing terminology and avoid excessive jargon.⁴
- Verify the search request BEFORE doing any searching. Rephrase the question and ask the patron to confirm that that is what they are looking for.⁴

Use of authoritative resources

Sources of Information

- **Use resources available from the patron's library whenever appropriate**
 - When searching for general information about a topic, **library resources** (such as guides produced by the library or proprietary databases from the library) are the preferred first places to look when assisting patrons. This information can be located on the library's [policy page](#). Make sure to consult the Patron Info section of the Chat Monitor to determine how the patron accessed the service and which library they belong to.⁴
- **Proprietary Databases**
 - Use the databases at the patron's library to answer a question, if possible. You can access these by looking at a library's [Policy Pages](#). Refer to the "**Database Access for Coop Librarians**" field in the **policy page** for the username/password or special authentication link. (Remember that those credentials are for coop librarian use only and must not be shared with patrons!).⁴
- **Print Sources**
 - If there is no online resource to answer the question but the answer can be found in a print source, then either refer the patron to a book located in the patron's library if you know the answer can be found in this print source, or treat the request as a Follow-up.⁴

Quality of Resources

- If sending resources from the general Internet, send specific resources, not links to results from general search engines (*e.g.*, Google results). In some cases, it may be appropriate to send search results from a database or from a specialized search tool as part of the reference conversation (*i.e.*, "Does anything on the results list look useful?").⁴
- Always cite the source of the information pushed to the patron if the source is not readily apparent on the online database or Web page. If you have specialized knowledge about the topic and answer the question based on your expertise, then specifically cite yourself as the source.⁴
- If you are unable to locate an authoritative answer to a question in a timely fashion, then handle the question as a Followup (see Section 5).⁴
- Choose resources at the appropriate level for the patron's research. In general, databases are preferable to Google or other general web sources when assisting students with research projects.⁵

Provide professional-level search assistance

- Provide context and instruction to the patron, rather than just sharing resources or merely sending web pages. Explain what sources you're consulting and what terms you're using for a database query. Provide enough guidance so that the patron can recreate the search if needed (include the name of links, which one the patron should click on, as well as the "click path"). Merely providing links to resources often will not suffice – some URLs are dynamic, such as library catalog search results, and the links that appear in session transcripts may become dead links.⁵
- Identify sources appropriate to the patron's need.⁴
- When offering information that may answer the question, request feedback from the patron (*i.e.*, Is this information helpful to you?). Work with the patron to narrow or broaden the search when too little or too much is found.⁴
- Help the patron evaluate the sources for relevance to their topic.
- Recommend appropriate search terms and subject headings.⁵

NOT RECOMMENDED:⁵

- **Patron:** Need help finding books on the history of black businessmen in New York City.
- **Librarian:** You should search the catalog with keywords like black, businesspeople, entrepreneurs, New York, african americans, history

RECOMMENDED:⁵

- **Patron:** Need help finding books on the history of black businessmen in New York City.
- **Librarian:** You can search the catalog by typing in things like this (exactly as I have them)...
- **Librarian:** african americans and business* and new york
- **Librarian:** or using that last one, replace business* with the word entrepreneur*

Good General Communication Skills

- Give the patron positive feedback and show interest in their question or problem.³ Use a receptive, cordial, and encouraging manner.
- Be aware of chat abbreviations and lingo that is used by many patrons.³ It helps to mirror the formality/informality of the patron.
- Chat frequently, so the patron doesn't have long lags without chat from the librarian.
- Break up long responses into a few blocks--this avoids long pauses and the patron can begin reading your response while you are completing it. On the other hand, try not to break your chat into too many discrete units, as this may be confusing or frustrating to the patron. A good rule of thumb is to send one or two sentences at a time.⁴

Example:

“First, go to the library homepage, [http://library.uncg.edu/...](http://library.uncg.edu/)”

“Then select “Databases” near the center of the page...”

“Then select Academic Search Premier...”³

- Let the user know what you are doing (*i.e.*, give them the play by play) if you need to perform a time consuming task.³

Example:

“Sorry, still searching...”

“I’m going to walk over and ask at Circulation.”

“Would you mind waiting a minute?”

“I’m going to try finding this in a different database, just a second please...”³

- Be patient with slow replies on the patron’s end. There are many reasons why this may be happening (slow connection, poor typing skills, multitasking, *etc.*)³
- Type like you talk, in a conversational manner. Clarify confusing terminology and avoid library jargon.⁴
- Use spelling, grammar and capitalization appropriately.⁴
- NEVER USE ALL CAPS! It translates to shouting.³

- Use positive phrasing ("We can..." instead of "We don't/can't/won't...")⁵
- Use emoticons when appropriate to convey friendliness.³
- Use the client's name and ask them questions when appropriate.⁷
- Avoid yes/no responses. Yes/no's can be interpreted as cold and unfriendly, just as in face-to-face reference.⁴

Offering more help

- Before closing the session, ask the patron if the question has been answered ("Does this completely answer your question?"), if additional information is needed, or if the patron needs help with anything else. If the transaction cannot be completed live, use the follow-up procedures and assign the "Follow Up by Patron's Library" resolution code.⁵
- Before coding Follow Up, verify the patron's email address and deadline. It may take several days for the patron to get an answer back from the library.⁵
- If you are unable to answer the patron's question, check to see if a librarian from the patron's library is online and IM/transfer the session. Otherwise, verify the patron's contact information for follow-up by their library.²
- Suggest the patron visit or call the library when appropriate.⁴
- If you are referring or asking another library to follow up, try and provide them with as much information as you can about the patron's problem or question.

Gracefully Wrapping up the chat transaction

- End the session only after a natural closure to the conversation. Thank the patron for using the service and encourage the patron to return. Always send a goodbye message, even if the patron has already disconnected.⁴
- Use the proper resolution codes. See the Resolution Code [flowchart](#) from Julie Strange.⁶
- Don't use Descriptive Codes if the patron is not an Answerland patron. The Cooperative's policy is that Descriptive Codes are assigned only to sessions or transactions with one's own patrons.¹

If you are still helping a patron and it is the end of your shift:

- If at all possible, stay online with the patron long enough to finish the session.⁴
- Offer follow-up to the patron. Suggested message: "This is taking longer than I expected. May I send this on for additional research and someone will get back to you via email?"⁴
- Ask any of your colleagues who are arriving for the next shift if they can accept a transfer. Be sure and send an IM to the new librarian first, before transferring. Be sure and tell the patron you are transferring the session to another librarian.⁴

- If none of the above work, and you will have to leave soon due to your shift ending, send a message such as: "Also, just to let you know I will have to end the session in a few minutes but don't worry -- we have some options! I can try to transfer you to another online librarian now ... I can have someone get back to you via email ... Or if you think you have enough for now but might need assistance later, you can come back when you need more help. Which would you like to do?"⁴

Best Practices--Situational Tips

Crisis Calls

- Answerland has a resource page with Oregon [Crisis Calls](#) resources
- QuestionPoint has a resource page for nationwide and UK [Crisis Resources and Hotlines](#)

Prank Calls and Rude Patrons

- See [4.5.1 Rude Patrons](#) from the QuestionPoint wiki
- Do not give out any personal information to patrons. If you ever feel that a patron is harassing, stalking, or threatening you in any way, please report the situation immediately to the Answerland Coordinator. Your safety and well-being are important to us.¹
- For local and statewide patrons (not coop) who exhibit inappropriate behavior:
 - Use the "Obscene warning" script to provide a simple warning.
 - If their motives are unclear, conduct a reference interview.
 - If it continues, use the "Obscene disconnect" script and end the session.
 - Upon ending the session, add the descriptive code "Prank."¹

Working with K-12 students

- See the [4.5.2. Homework Help](#) from the QuestionPoint wiki

Helping non-local patrons

Many of the questions Answerland receives through the public queue are not "reference" per se. They are about circulation/accounts (holds, fines, *etc.*), troubleshooting (ebooks, PIN resets, *etc.*), and services (when is xyz program, is there a fax machine, *etc.*). Here are some tips for managing patron expectations:

- For both the statewide queue and the 24/7 queue, when welcoming the patron, identify the name of the library or group you are affiliated with, in order to set expectations with the patron.⁴

- Consult the policy pages of your patron’s home library, and visit their library homepages if the policy pages don’t answer your question. Sometimes patrons haven’t thoroughly looked on their library website.
- When you are not able to assist a patron with a local question, such as a circulation or technological question, clearly explain why you are unable to offer help.

Example:

“I’m sorry, I can’t look up your fine amount because I’m not a librarian at your local library. I don’t have access to your library account. However, I’m happy to help you get in touch with the people at Multnomah County library who can look it up quickly.”

“This ebook question is tough! I don’t work with the Overdrive app much, so I’m having trouble resolving this over chat. Your local librarians can help you much faster than I can in person or over the phone. Would you like their contact information?”

- While it’s still appropriate to offer follow up by email, tell patrons what other options may help them quickly resolve their question, and provide appropriate contact information. *E.g.*, the phone number for the circulation department or the location of the closest local branch.
- If following up on account questions by email, ask the patron for their name and library card number so their home library can follow up quickly.

Ethics

- Uphold the principles of intellectual freedom.⁷
- Comply with contractual licensing agreements, for both electronic and print materials; specific restrictions of use; and any copyright laws governing the materials in question.⁷
- Show professional courtesy and respect when answering questions. Maintain objectivity and do not interject value judgments about subject matter or the nature of the question into the transaction.⁷
- Avoid assumptions about gender, sexual orientation, age, socioeconomics, race and/or ethnicity, education level, technical abilities, literacy levels, native or acquired languages, *etc.*⁸
- Do not interpret legal, medical, and statistical information or give advice. You can point patrons to resources and research tools, but not specific forms.
- For local and statewide questions (not coop): Use the “Legal research” or “Medical research” script to notify the patron of what help you are able to give. For complex legal questions, let the patron know that you are referring their question to a law librarian for follow-up, end the session, and add the descriptive code “Law Libraries.”¹

OCLC Advice for Mitigating Microaggressions⁸

The following pointers are from the webinar “Mitigating microaggressions in virtual reference,” presented by Marie Radford and Lynn Silipigni Connaway.

- When unsure of what the patron is asking, respond with open questions to gather more information.
- If the library doesn’t have the resource a patron is asking for, suggest alternative library services such as interlibrary loan or a purchase request form. If that doesn’t meet their need, ask if they are interested in purchasing the item themselves, rather than immediately sending a link to Amazon. That assumes economic status and ability to purchase.
- Avoid wording implying identity or ability assumptions (*i.e.*, gender, sexuality, age, socioeconomic status, or technical expertise).
- Don’t assume competence, *e.g.*, familiarity with names of databases. Explain resources.
- Suggest specific alternative resources (not just “look elsewhere”). Patrons have probably already tried Google.
- Allow time for user replies.
- Don’t do “drive-by reference” where you shoot off URLs without a reference interview.
- Listen to feedback on information needs and heed calls for help.
 - *e.g.*, watch for “well...I guess so” in response to “Did this completely answer your question?”
- What takes the time is not relational back-and-forth but the search itself. The extra second of back-and-forth might make for a more highly successful interaction.
- Provide needed information without implying that doing so is a hassle.
 - Example: Use “This is going to take me a few minutes to search. Is that okay?” instead of “I’m going to have to do a lot of work to answer this question.”
- Patrons generally are not in a hurry; they use chat because it’s convenient, so don’t be afraid to be thorough.
- Send generalized resources for broad questions.
 - *e.g.*, a user asking for sex ed. information could be any age, gender, or sexual orientation, so avoid resources geared to a specific audience.
- Present resources from various perspectives, such as authors of different genders, racial backgrounds, political views, *etc.*
- Avoid nonverbal invalidations, *e.g.*, slowness to respond or transfer people you feel uncomfortable with, people you assume are troublemakers, *etc.*
- When you realize that you’ve made an error, apologize. Apologies can go a long way.

For more information on chat reference best practices:

[Virtual Reference Best Practices slideshow by Tamara Ottum](#)

[Best Practices for 24/7 Reference Cooperative Sessions](#)

Part 4. Performance Standards from the [24/7 Reference Cooperative Policies and Procedures](#)

[Mitigating microaggressions in virtual reference-20180221 1859-1](#)

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