

Quality Assurance Activities for Managers

Managers are key in ensuring that Research Help Now provides a consistently high level of service to patrons. Below are suggestions for ways managers can help ensure quality service.

- Being present for a shift is just as important in virtual reference as it is on the reference desk. Emphasize to librarians the importance of logging in for shifts promptly. Make sure they know they must notify you if they need a sub for a shift. Spot check to make sure your librarians are staffing their shifts.
- Ask individual librarians how virtual reference is going for them. Ask if they have any questions or are experiencing any problems. Follow up on their questions and problems.
- Ask librarians to share any suggestions for additional collaborative guidelines or policies and forward their ideas to the collaborative coordinators.
- Make sure librarians know how to report technical problems if the manager is away.

Below are tasks managers should perform on a daily and weekly basis to ensure quality service.

DAILY

[Check for sessions with your patrons which have been placed in Shared Followup.](#)

This task is especially important for Michigan Academic Group managers on Mondays, since the 24/7 reference librarians will be working with those patrons on Sundays. 24/7 librarians often refer sessions to a patron's home library.

1. Log in to the My QuestionPoint page.
2. Find the Question Lists section in the left margin.
3. Click on "Shared Followup" if there is a number next to this link.
4. In the resulting list of sessions, check the right hand column for sessions with your patrons. If a session took place with your patron, you will see your institution's name in capital letters under the patron's name.
5. Use your judgment to select one of the following options that will provide the most timely response to the patron's question:
 - a. Ask one of your librarians to claim and respond to the question.
 - b. Assign the question to yourself and answer it. To assign the question to yourself and answer it:
 - i. Click on the question.
 - ii. Click on **Claim**.
 - iii. Click on **Answer**.
 - iv. Enter your response in the Answer text box.
 - v. Click on **Send Answer**.
 - c. Do not close the question immediately after answering it, as this removes it from the patron's view. Please wait for two weeks before closing it.

Note: As the Manager for your library, you should also receive an email alert when a session with one of your patrons goes into Shared Followup. However, please also check the My QuestionPoint page daily until we are sure that email alerts are working smoothly.

[Check sessions with your patrons which have been placed in Answered and New.](#)

1. Log in to the My QuestionPoint page.
2. Select **Ask** from the dropdown "Select Service" menu in the upper right corner.
3. Click on **Answered** (or **New**) in the blue bar.
4. Click on the title of a transcript to display it.
5. If "Answered," decide whether the librarian answered the question fully.

6. You can send the patron additional information if he/she provided an email address.
To do this:
 - a. Click on **Answer**
 - b. Enter the additional information in the Answer text area
 - c. Click on **Send Answer**
7. Assign additional descriptive codes to sessions that need them. Assign codes only to sessions with your patrons. To assign additional descriptive codes:
 - a. Work from the displayed transcript (step 4 above)
 - b. Click on **Add Descriptive Codes**
 - c. Select up to four descriptive codes from the dropdown menus at the top of the page

WEEKLY

Review transcripts for sessions conducted by your librarians or with your patrons.

1. Log in to the My QuestionPoint page.
2. Select Ask from the dropdown "Select Service menu."
3. Click on **Review Transcripts**.
4. Use the Date Entered boxes to limit results to the week you need.
5. Click on **Search**.
6. Click on a session's ID number to display its transcript.

When you review a transcript, please evaluate its quality. Refer to the "VR Behaviors Checklist"—available on the Librarians Intranet-- to remind you of our service standards. You may want to:

- a. **Compliment** a librarian for a job well done.
- b. **Recommend** that an especially good transcript receive collaborative-wide recognition.
If so, send the transcript ID number to Debby Harris (harrisd1@lcc.edu).
- c. **Follow up** with one of your librarians if you spot a problem in providing service.
- d. **Contact** the manager of another library's institution if you notice a problem with the service one of their librarians provided to one of your patrons.
- e. **Contact** Debby Harris (harrisd1@lcc.edu) for concerns about quality.

In addition, for sessions conducted with your patrons by librarians outside your institution, check transcripts with the resolution code "Answered" to see if any additional information needs to be sent to the patron.

Review sessions conducted for your patrons by the 24/7 librarians.

Librarians from QuestionPoint's 24/7 service staff the Michigan Academic queue on Sundays 1 - 5 pm and 9 – 12 midnight. It's important that we monitor the quality of the 24/7 sessions and contact QuestionPoint with both praise and concerns. You can do this at the same time you review other transcripts for the week.

Refer to the 24/7 Cooperative's Performance Standards, available at:

http://questionpoint.org/ordering/cooperative_guidelines_247rev3.htm#4

QuestionPoint's Quality Team wants to hear from us if one of the 24/7 librarians has either done a great job or has not followed these standards.

To access the 24/7 transcripts and refer transcripts to the Quality Team:

1. Go through steps 1 – 5 above.
2. If the session was conducted by a 24/7 librarian, evaluate it using the 24/7 Cooperative's Performance Standards.
3. If you see a session that you wish to refer to the Quality Team:

- a. Send a comment and the transcript ID number to: gpquality@gmail.com.
- b. Please also copy Debby Harris, our collaborative's Quality Assurance Manager: harrisd1@lcc.edu.

NOTE: If you feel the patron should have received more information, be sure to follow up with the patron before contacting the Quality Team.

4. If you do not send a comment to the Quality Team, please close the question two weeks after it has been answered.

Close answered questions for sessions conducted with your patrons.

IMPORTANT: Close only questions that have come from **your library's patrons**. Do not close questions from other libraries' patrons, even if your librarians answered them. If you close questions from other institutions' patrons, those libraries will not be able to follow up.

NOTE: Avoid closing a question which has just been answered. If you do, the patron will not be able to view it.

Please wait **two weeks** before closing questions to allow time for patrons and the patrons' libraries to review them.

To close questions:

1. From the My QuestionPoint page, select **Ask** from the Select Service dropdown menu.
2. Click on **All** in the blue horizontal bar near the top of the page.
3. Click in the checkbox in the first column for the question you want to close.
4. Scroll to the bottom of the page.
5. Select **Close Question** from the Select Action dropdown menu.
6. Click on the arrow to the right of the dropdown menu.
7. The icon next to the left of the question will change to a yellow folder, indicating the question has been closed.

Developed by Debby Harris for the Research Help Now Collaborative. Rev 4/08