

Resolution Codes, Transcript Status, Question Lists, Descriptive Codes (Chat)

After you click the **End Session** button:

- You should select one of the Resolution codes and click **Add**.
- You may select up-to-four Descriptive codes and click **Add** if:
 - The patron is one of your library's patrons, and
 - Your library uses Descriptive codes.

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Resolution code guidelines







Select a Resolution code and click **Add** after you click the **End Session** button.

The [24/7 Reference Cooperative's best practices document](#) contains guidelines for use of the Resolution codes by members of the cooperative. Libraries and groups should provide guidelines for use of the codes by their librarians when they are not participating in the cooperative.

Administrators can view reports by Resolution code in the Ask module.

Resolution codes and transcript status

The table below lists the available Resolution codes and the status of the chat transcript that is set in QuestionPoint when you select a code.

Resolution Code	Status in QuestionPoint
Answered	 Answered
Followup by me	 New for you and your library  Pending for the patron's library if it is not your library
Followup by patron's library	 New for the patron's library
Lost call	 Closed
Practice	 Answered


Resolution codes and question lists when you chat with your library's patrons

The table below lists the available Resolution codes and the question lists in which the transcript appears in QuestionPoint when you select a code and you are chatting with one of your library's patrons.

Resolution Code	Your library's question lists	Your personal question lists
Answered	Answered Active All	Answered Active All
Followup by me	New Active All	New Active All
Followup by patron's library	New Active All	None
Followup by patron's library	New Active	None


(And your group uses Shared Followup)	All Shared Followup	
Lost call	Closed All	Closed All
Practice (Transcript is labeled "Practice" in question lists)	Answered Active All	Answered Active All

Resolution codes and question lists when you chat with another library's patrons

The table below lists the available Resolution codes and the question lists in which the transcript appears in QuestionPoint when you select a code and you are chatting with another library's patron. You see an orange down () arrow in the right column of the list for these transcripts.

Resolution Code	Your library's question lists	Your personal question lists	Patron's library's question lists
Answered	Answered Active Referred All (None, if your library excludes transcripts for other libraries' patrons)	Answered Active Referred All (None, if your library excludes transcripts for other libraries' patrons)	Answered Active Referred All
Followup by me	New Active Referred All	New Active Referred All	Pending Active Referred All
Followup by patron's library	None	None	New Active Referred All
Followup by patron's library (And patron's library's group uses Shared Followup)	None	None	New Active Referred All Shared Followup
Lost call	Closed All (None, if your library excludes transcripts for other libraries' patrons)	Closed All (None, if your library excludes transcripts for other libraries' patrons)	Closed All
Practice (Transcript is labeled "Practice" in question lists)	Answered Active Referred All (None, if your library excludes transcripts for other libraries' patrons)	Answered Active Referred All (None, if your library excludes transcripts for other libraries' patrons)	Answered Active Referred All

Resolution codes and question lists when other libraries chat with your patrons

The table below lists the available Resolution codes and the question lists in which the transcript appears in QuestionPoint when another library's librarian chats with one of your patrons and selects a code. You see a green up () arrow in the right column of the list for these transcripts.

Resolution Code	Your library's question lists	Chatting library's question lists
Answered	Answered Active Referred All	Answered Active Referred All (None, if library excludes transcripts for other libraries' patrons)
Followup by me	Pending Active Referred All	New Active Referred All
Followup by patron's library	New Active Referred	None

	All	
Followup by patron's library (And your group uses Shared Followup)	New Active Referred All Shared Followup	None
Lost call	Closed All	Closed All (None, if library excludes transcripts for other libraries' patrons)
Practice (Transcript is labeled "Practice" in question lists)	Answered Active Referred All	Answered Active Referred All (None, if library excludes transcripts for other libraries' patrons)

Resolution codes and chat sessions that end unexpectedly

If a chat session ends unexpectedly:

- Before a librarian picks up the session, the transcript is treated as if the Followup by Patron's Library resolution code was selected.
- After a librarian picks up the session, the transcript is treated as if the Answered resolution code was selected.

Resolution codes by question list

New Questions list contains transcripts with the following resolution codes:

- Followup by me (librarian's library)
- Followup by patron's library (patron's library)

Shared Followup Questions list contains transcripts with the following resolution code:

- Followup by patron's library (patron's library's group that uses shared followup)

Pending Questions list contains transcripts with the following resolution code:

- Followup by me (patron's library)

Answered Questions list contains transcripts with the following resolution codes:

- Answered
- Practice

Closed Questions list contains transcripts with the following resolution code:

- Lost call

Referred Questions list contains transcripts with the following resolution codes (for sessions in which patron and librarian are from different libraries):

- Answered
- Followup by me
- Followup by patron's library
- Practice

Active Questions list contains transcripts with the following resolution codes:

- Answered
- Followup by me
- Followup by patron's library
- Practice

All Questions list contains transcripts with the following resolution codes:

- Answered
- Followup by me
- Followup by patron's library
- Lost call
- Practice

Tips about which question lists to use to follow up on chat sessions



The New list (or Shared Followup) is the list that has questions or transcripts that you must handle. You might use the other lists to:

- Review work already done.
- Check on questions in your Pending list, to see if someone has tended to them yet.
- Refer to an earlier question that you answered.

Because your primary focus is probably on the New (or Shared Followup) list, it usually is not necessary to spend lots of time in the Active list. Many librarians prefer to use the Answered list to review completed transactions because it focuses on work already done.

If you are in a cooperative group that helps one another's patrons, be aware of which transactions are with your own patrons before closing them. Closing a

transaction closes it for all involved libraries.

- If you see a green up () arrow in the right column of the list, the transaction is for one of your patrons. It was "referred out" for attention elsewhere, or it was a chat session another library picked up for you. You can close this transaction.
- If you see an orange down () arrow, the patron is from another library. The transaction was either referred to you for attention, or you picked up a chat session for another library.

If your library has a Shared Followup list and you are unsure when to use it, check with your administrator. Some libraries answer questions from Shared Followup when they have no new questions in their New list. Some libraries work strictly from the Shared Followup list. Always claim a question before starting to research it; this will remove it from the Shared Followup list.

When you follow up on sessions, be sure that the patron supplied an e-mail address before you try to send a message to the patron.

Descriptive code guidelines

You may select up-to-four Descriptive Codes (in the Select Description area) after you click the End Session button.

If your library is part of a cooperative, so you help other libraries' patrons as well as your own, you should add Descriptive Codes **only if** the patron is one of your library's patrons or your cooperative has agreed to assign codes to one another's patrons. **The 24/7 Reference Cooperative's policy is that Descriptive Codes are assigned only to sessions or transactions with one's own patrons.**

Libraries use Descriptive Codes to categorize the questions that they receive. The codes help them analyze the questions. For example, librarians might select Descriptive Codes such as Catalog, Directional, Instructional, or Research to categorize questions. Then administrators can view reports showing how many Catalog, Directional, Instructional, or Research questions that the library received.

You can also add, change or remove Descriptive Codes from the Full Question page for a chat session or question. See [Add Descriptive Codes](#) for instructions

Related topics

- [Question status key](#)
- [Question status description](#)
- [Chat: contents of online help](#)

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