“Research Help Now”

Michigan Virtual Reference Service Collaborative

Manual of Policies and Procedures
Hail to thee, blithe spirits, colleagues all

out of the air
from Delaware
comes a plaintive soulful cry

"how *do* I buy the book"

I'll do what I can
from Michi-gan

Why don't we have a look

Through policies, scripts and
various URLs
I endeavor to define

How one would parse this gentle plea
at once profound, sublime

You know, it's not too often
that I receive such a precise request
but I'm confused, a bit astray
while working at your behest

could it be bibliographic
this problem that unfolds?

or perhaps a classroom panic --
trying to do what you've been told?

My interest wanes, I am perplexed
I struggle to comply
why me dear lord, why me today
why "be here now" I sigh

The warning bells continue
Bleating their sonic pluck
The sound ever so insistent now …
Refusing to give up

But, lo, what wondrous absence this?
Forsooth, I am in luck,
the bells have stopped, oh glory be,
another colleague has picked up!

By Randal Baier, 2011
# Table of Contents

## I. Introduction and Background
- A. Mission Statement 4
- B. General Information about Research Help Now 4
- C. About the Michigan Community College Association and MCCVLC 4
- D. Funding 4
- E. Fiscal Agent 5
- F. Additional Background 5

## II. Service
- A. Authorized Users of Databases 6
- B. Clientele 6
- C. Copyright and Research Databases 6
- D. Hours of Operation 6
- E. InterLibrary Loans 7
- F. Privacy 7
- G. Scope of Questions Answered 7
- H. Referrals 8
- I. Sending Supplemental Materials 9-10
- J. Web Site 10
- K. MySpace 10
- L. Facebook 10
- M. WorldCat 10

## III. Communication
- A. Listserv 11
- B. Web Site Intranet 11
- C. Best Transcript Contest 11
- D. Newsletter 11
- E. Annual Meeting 11

## IV. Base Management Environment (BME) or Queue
- A. Definition of Provider Groups 12
- B. Queues 11
- C. Which Groups to Monitor 12
- D. Practice Group 13

## V. Reference Guidelines
- A. Staffing 14-16
- B. Handling Calls 16-17
- C. General Reference Section Guidelines 17
- D. Ending Session/Closing Calls 18-20
- E. Guidelines for Answers and Information Resource 20-21
- F. Miscellaneous Guidelines 22
VI. Information for Managers
   A. Manager Tasks 22
   B. Which URL to Post 23-24
   C. Adding Local Library Scripts 23-24
   D. Updating Your Library’s Profile 24
   E. Groups 24
   F. Practice Groups 24
   G. Class Demonstration 25
   H. Followup Set-Up for Managers 25
   I. Qwidget Set-up 26
   J. Chat Form Set-Up 26-27
   K. Email Webform Set-Up 27
   L. How to Do Statistical Reports 28-29

VII. 24/7 Cooperative
   A. Background Information 30
   B. How to Give Access to the 24/7 Cooperative Queue 30
   C. Individual Institution Policy Page 30
   D. Schedule 30
   E. Best Practices 30
   F. Policies and Procedures 31

VIII. Contacts
   A. Reporting Problems 31
   B. Troubleshooting 31
   C. Disconnect 31

IX. Emergency Closing Procedure for your Library/Campus 31-32

X. Policies and Procedures Updates 32

Appendix I Virtual Reference Best Practices 33-35
Appendix II Qwidget Best Practices 36
Appendix III Successful Reference Communication Strategies 37-38
Appendix IV Research Help Now Organization 39-40
Appendix V Research Help Now Michigan Virtual Reference Collaborative Organizational Chart 2012 41
Index 42-43
I. Introduction and Background

A. Mission Statement

Research Help Now supports our educational community with research help from a librarian using 24/7 live chat.

B. General Information about Research Help Now Michigan Virtual Reference Collaborative

Research Help Now Michigan Virtual Reference Service was begun in February, 2004 as a project funded by a U.S. Department of Education Fund for Improvement of Postsecondary Education (FIPSE) Grant for the Michigan Community College Virtual Learning Collaborative (MCCVLC). It was formed by a group of Michigan Community College Libraries to offer Virtual Reference to their communities. Research Help Now Virtual Reference Service is made available free of charge to all patrons of the participating Michigan Community Colleges, Eastern Michigan University, Michigan State University, and the MCCVLC. The Collaborative is staffed primarily by professional librarians from the participating institutions, supplemented by QuestionPoint 24/7 Reference Cooperative and After-Hours professional librarians.

C. About the Michigan Community College Association and MCCVLC

The Michigan Community College Association (MCCA) is an association of all 28 publicly funded community colleges in Michigan. Through the MCCA, Michigan Community Colleges have worked together since 1997 in the development and operation of the Michigan Community College Virtual Learning Collaborative (MCCVLC). The MCCVLC is designed to allow current Michigan community college students to take online courses from other member colleges while still receiving support services at a convenient "home" college.

D. Funding

In September of 2002, the Michigan Community College Association received notification from the U.S. Department of Education that a proposal to the Fund for Improvement of Postsecondary Education (FIPSE) had been accepted for funding. The grant period was October 1, 2002 through September 30, 2005.

This initiative assisted the 28 public Michigan community colleges in developing distributed, integrated online academic and student support services. This project was not intended to be comprehensive in scope and address every area of online academic and student support services; rather it focused on six specific areas of student support: orientation, library services, academic advising, tutoring, test proctoring, and help desk. More information about the FIPSE Grant can be found at http://www.mccvlc.org/~staff/content.cfm?ID=206 The FIPSE Grant funded the first year of Research Help Now. Funding covered the costs of the virtual reference software from tutor.com. The original community colleges participating in the project were Glen Oaks, Gogebic, Grand Rapids, Kalamazoo Valley, Kellogg, Kirtland, Lansing, Macomb, Mid Michigan, Mott, Muskegon, North Central Michigan, Northwestern, Oakland, St. Clair,
Washtenaw and Wayne County. Once the grant period expired in September, 2005, funding for the software was taken over by the member libraries. Current membership is now: Eastern Michigan University (joined 2008), Jackson (2005), Kalamazoo Valley, Kellogg, Lansing, Macomb, Michigan State University (2005), Mott, Muskegon, Northwestern Michigan, Oakland, St. Clair, Washtenaw, and Wayne County.

In the summer of 2007, Research Help Now Michigan Virtual Reference Collaborative migrated to OCLC QuestionPoint Virtual Reference software. A new funding formula was set based on number of FTE for the member library. The cost tiers were:
- Level 1: < 3,000
- Level 2: 3,001 – 12,000
- Level 3: 12,001 – 15,000
- Level 4: 15,000 plus

In 2007, Grand Rapids Community College withdrew from Research Help Now. The services of QuestionPoint 24/7 Reference After-Hours Librarians were contracted to extend Sunday hours of operation.

In 2008, Michigan State University contracted for a separate queue with QuestionPoint enabling them to participate in the 24/7 Academic Cooperative. Schoolcraft College and Monroe Community College decided not to renew their participation with Research Help Now.

The Library of Michigan did not renew their 2009-2010 contract with OCLC QuestionPoint due to the State budget crisis.

In October 2009, the collaborative began participating in the 24/7 Reference Cooperative Academic Group by monitoring national academic queues thereby enabling the Michigan collaborative to offer virtual reference services every hour. This change allowed MSU to rejoin the Michigan Academic Group BME.

In 2010, Jackson decided not to renew their participation with Research Help Now, but rejoined in October 2011.

E. Fiscal Agent
The Midwest Collaborative for Library Services (MCLS) has been selected as fiscal agent for the collaborative to oversee the negotiation of a contract with the software vendor and to assist with administrative functions in the event of expansion of the Collaborative’s membership.

F. Additional Background
See additional background information about 24/7 Reference Cooperative under Section VII. Reference Cooperative.
II. Service
A. Authorized Users for Databases
The Collaborative defines authorized users of the research databases as enrolled students, active instructors, faculty, active staff, or patrons of each institution. Furthermore, the Collaborative will abide by the database subscribers license agreements for remote patron access. This limits the use of the databases to patrons whose institution subscribes to the database. A patron from one college cannot, unless enrolled at the college or a college employee, use another college’s database during a Virtual Reference session. Residents of the state of Michigan can use Michigan eLibrary databases with a valid state driver’s license or ID.

B. Clientele
The Research Help Now service strives to respond to all questions. Priority is given to inquiries from the faculty, staff and students of the participating institutions. Priority is also given to questions about the participating institutions and resources unique to these institutions including resources of the federal depository collection. Other questions may be referred to other appropriate sources. It is also intended for any students taking courses through the MCCVLC and their instructors.

C. Copyright and Research Databases
The Collaborative will abide by the copyright and limited use clause as set by the database vendors’ license agreements and Fair Use Guidelines.

D. Hours of Operation

Service for Fall and Winter

Service Hours (when collaborative members are monitoring) –

<table>
<thead>
<tr>
<th>Day</th>
<th>Hours</th>
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<tbody>
<tr>
<td>Monday-Wednesday</td>
<td>10am-9pm</td>
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<tr>
<td>Thursday</td>
<td>10am-5pm</td>
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<tr>
<td>Friday</td>
<td>10am-4pm</td>
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<tr>
<td>Saturday</td>
<td>Closed</td>
</tr>
<tr>
<td>Sunday</td>
<td>8pm-10pm</td>
</tr>
</tbody>
</table>

Service Hours – May - August – Depends on availability of Librarians

<table>
<thead>
<tr>
<th>Day</th>
<th>Hours</th>
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<tbody>
<tr>
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<td>Saturday</td>
<td>Closed</td>
</tr>
<tr>
<td>Sunday</td>
<td>8pm–10pm</td>
</tr>
</tbody>
</table>

Holidays Closed
- Martin Luther King Jr. Day
- Memorial Day ‘Eve’
- Memorial Day
Independence Day
Labor Day ‘Eve’
Labor Day
Thanksgiving ‘Eve’
Thanksgiving Day
Day after Thanksgiving
Holiday Break

The scheduler may determine additional reduced hours surrounding holidays, between terms, and during May – August.

The Collaborative participates in the 24/7 Reference Cooperative which extends their service hours to 24hours/day.

E. InterLibrary Loan

1. Policy for the Home Institution to be ILL Provider

   The Research Help Now Michigan Virtual Reference Collaborative home institution library has the responsibility to supply library course support, including initiating and processing ILL requests from the patron. Each library’s normal procedures for ILL will be observed. Refer to the ILL policies section of the home library’s Policy page.

2. MeLCat

   The Collaborative has several participating libraries who are also MeLCat members. If a patron’s home library is a MeLCat member, remember to offer the service to them. Check the policies link when assisting a patron for MeLCat information.

F. Privacy

For the 90 days that a session transcript record is listed as active, the patron information (name and e-mail address) remains attached to the record. After 90 days, patron information is stripped from the record. Such information will not be published or shared with any other party. Below we describe the information we request and how it is used:

- Name: the Name is used by the software to identify a session and in communicating with the user during a session. While a name is required, it does not have to be the full or real name.
- Email address: An email address is required to use this service. It will be used only in the provision of service from this site. No email addresses will be sold or given to any other entities. Emails are stored in session transcripts. The Michigan Virtual Reference Service may use your email address to:
  - Send a transcript of the session for your reference at the end of a session
  - Send a scanned document at a later time
• Follow up on an incomplete session

• Phone number: A phone number is not required to use this service. If one is provided, it will only be used by the librarians to contact you during your VR session. No phone numbers will be sold or given to any other party.

Librarians from the Michigan Virtual Reference Collaborative may use session transcript information to:
• Follow up on an incomplete session
• Email to the user as a record of the session and a reminder of any resources provided during the session
• Monitor and improve the overall quality of service
• Identify user IPs for troubleshooting
• Collect statistical data for reporting on the number of requests received, the number of requests completed, and the average length of sessions.

In the course of clarifying the request for information the Librarian may ask for information regarding purpose (for instance, is this for a homework assignment?), or reading or grade level. Such incidental information will be used to identify appropriate resources only. Any information given to the Library will be stored in a session transcript.

QuestionPoint retains transcripts for 2 years in the Reports tab.

G. Scope of Questions Addressed

The reference service provided in the virtual reference arena will subscribe to the standard guidelines of reference service (RUSA Guidelines for Cooperative Reference Service Policy Manual http://www.al.org/ala/mgrps/divs/rusa/resources/guidelines/guidelinescooperative.cfm and MARS Digital Reference Guidelines Ad Hoc Committee http://www.al.org/ala/mgrps/divs/rusa/resources/guidelines/virtrefguidelines.cfm) Questions answered will be the same as those answered at the physical reference desk. It will be at the discretion of the librarian to determine which questions to refer and which to address. If unable to provide an answer, the patron will be provided information regarding whom to contact or the session can be classified as followup.

Exceptions:
• Genealogy questions will not be answered.
• Medical and legal questions will be answered with sources fully cited and interpretation left to patron.
• Only questions of an academic nature at our institutions will be addressed.
H. Follow Up

Use the “Follow Up by Me” or “Follow Up by Patron’s Library” resolution codes when you have been disconnected with a patron during a session require more time to answer the patron’s question, or require the assistance of the patron’s home library. In addition, if the librarian assigns a resolution code “follow up,” it also allows the patron’s library to see your response and determine whether the library wants to do any additional follow-up.

See Research Help Now Intranet for “Set Up Your Library Profile for Follow-Up”

Directions for sending an email follow-up in QP are available in QuestionPoint’s “Chat follow up and referral” document available at: http://www.questionpoint.org/support/documentation/gettingstarted/qp_ref_followup.pdf

Important:

Each institution should list on their policy page information on what is available to their patrons. This would include circulation privileges, database access, access to special collections and computer lab use. Check the information for the patron’s home institution in the “Policies” link before selecting “follow up.”

I. Sending Supplemental Materials

Librarians may supplement virtual reference transactions as needed with long distance phone calls, faxing, photocopying, and e-mail, depending on resources available at the librarian’s institution. Librarians can close the call with resolution code “follow up.” When following up on the question, the QP software allows you to attach documents to the email.

If the librarian has useful printed documents that the student would like delivered to them, the librarian may offer any one of the following delivery options per VR session (assuming they are within Fair Use guidelines):

- One fax transmission up to 10 pages. (A single fax transmission may include pages from more than one source.)
- Up to 10 pages (or 5 duplex/back to back) of photocopies. Materials can be held for the student to pick up from the library or will be sent in the mail.
- Up to 2 pages of a scanned document to attach to an e-mail.
- One long distance phone call per VR session.

Students will not be charged for any costs associated with photocopying, mailing or faxing documents.

During busy service times, librarians should tell the student the time frame for delivering the document and get an OK before sending.
Resources should be fully cited.

Refer students to their home libraries when they request interloans and returnables such as books.

J. Web Site

The web site for the collaborative is http://www.researchhelpnow.org

K. Facebook

An account with Facebook has been created to increase visibility and user of Research Help Now. The link to Facebook page is http://www.facebook.com/pages/Research-Help-Now/6363433339

L. WorldCat

The following is optional but is highly recommend for Managers to set up. You can add a link in WorldCat to “Ask a Librarian”. You can have it link to www.researchhelpnow.org or link to your own library’s virtual reference library webpage.

Here are the steps for Question Point
1. Login as administrator
2. Select Administrator
3. Select Forms
4. Open WorldCat Setting: Display link to our reference service select YES
5. Enter the URL in the Questions Form URL box [note: don’t change the viewport URL box]
6. Click Save

Here are the steps for WorldCat (you need to be the OCLC ADM person for this section)
1. Go to http://worldcat.org/registry/institutions
2. Sign it with user ID and password.
3. Click “My Institutions” (upper right-hand corner).
4. View/Edit your Profile.
5. Under “Services” on the left menu, choose “Virtual Reference” and edit the page.
III. Communication

A. Listserv
   a. Collaborative Listserv—All participating librarians will be added to the Virtual Reference Listserv hosted by Midwest Collaborative for Library Services (MCLS). This discussion list is used for communication, schedule, updates, policies, training, tips, etc. When sending a message to the list, use: Virtual_reference@mail.mlcnet.org To join the list or be removed from the list, send Sandy McCarthy an email at mccarthy@wccnet.edu
   b. Managers Listserv – Managers will create their own email group list.

B. Web Site Intranet
   The Intranet for VR librarians can be accessed from the http://www.researchhelpnow.org web site. Scroll to the bottom, click on “For Librarians Only” link.
   Username:
   Password:

C. Best Transcript Award
   All virtual reference librarians are encouraged to nominate noteworthy transcripts for consideration for the Best Transcripts Awards. Librarians may nominate their own transcripts and those of their colleagues at any time during the year beginning October 1st through September 30th. At the close of each contest year, the Best Transcripts Contest Committee, comprised of the Committee Chair and at least two other collaborative librarians, will select the award winning transcripts from amongst those nominated. The winners will be honored during the Annual Virtual Reference Service Meeting

   To nominate a transcript:
   1. Copy and paste the entire transcript (including the Question ID#) into a Word or text document. Include any completed surveys.
   2. Do not strip out identifying information
   3. Email the file to the Committee Chair

D. Newsletters
   The Collaborative will periodically write a newsletter updating the members on about Research Help Now and its librarians. Previous newsletters can be located on the Intranet.

E. Annual Meeting
   The Michigan Virtual Reference Service Collaborative will meet once a year as a group.
IV. Base Management Environment (BME) or Queue

A. Definition of Base Management Environment (BME) or Queue
The Base Management Environment (BME) is a feature of a library’s QuestionPoint subscription also known as a queue. The BME covers access to the entire suite of tools in the Reference Management Service, including e-mail management, question forms, chat forms, chat reference and followup, scripted messages, a local knowledge base, access to the Global knowledge base, and access to the Global Reference Network (GRN).

(Definition taken from QuestionPoint Overview document p. 3)

The Collaborative has one BME, the Michigan Academic Group. The members of the Michigan Academic Group consists of librarians from Eastern Michigan University, Jackson Community College, Kalamazoo Valley Community College, Kellogg Community College, Lansing Community College, Macomb Community College, Michigan State University, Muskegon Community College, Northwestern Michigan College, Oakland Community College, St. Clair Community College, Washtenaw Community College, and Wayne County Community College District. This Group will work together in a shared chat queue to provide chat coverage. Each library in the Michigan Academic Group will follow-up on its own patrons’ questions. The group administrator uses reports and statistics of group activities to monitor and manage the group. The group has the ability to share a local knowledge base if one is set-up.

Ann Walaskay, OCC, has a BME account for the Collaborative.

The Service Unit Profile (SUP) is another feature of a QuestionPoint subscription. The SUP covers the identification of a library as a discrete, reference work unit. Each library has a SUP that provides access to its own questions, chat transcripts, reports and statistics, policy information, librarian accounts, scripted messages, e-mail messages, question forms, chat forms, etc.

The Michigan Academic Group has 13 SUPs, one for each academic library.

B. Queues
These queues have been created for the Collaborative:

Michigan Academic Group
24/7 Reference: Academic Cooperative Practice Queue

C. Which Groups to Monitor
Librarians who are monitoring both the libraries in the Michigan Virtual Reference Collaborative and the 24/7 Reference Cooperative should select to monitor both the Michigan Academic Group and the 24/7 Reference Cooperative queues. Librarians monitoring only the Michigan Virtual Reference Collaborative libraries should select only the Michigan Academic Group queue.
librarians may find the information below useful, especially for practice or test during the times the collaborative is open.

D. Practice
To practice or test during VR open hours, use the Practice Queue. The Practice Queue is linked from the Chat Form Monitor. After login with your QuestionPoint ID, launch Chat, select Practice Queue on the Select Queue screen. Note: the practice queue does not receive Qwidget questions.

V. Reference Guidelines

A. Staffing
   1. Collaborative Librarians
      All participating librarians must have experience working at the reference desk and must have been trained to use the QuestionPoint software prior to working the Virtual Reference desk. An MLS is preferred.

   2. Semester Schedule
      Prior to the beginning of each semester, the Schedule Administrator will survey the Managers for preferred VR desk shifts. Adjustments in the collaborative open hours may need to be made and posted on the RHN web site.

At the Fall 2007 VR Annual Meeting, member libraries agreed to provide a base minimum of three hours of staffing for virtual reference per library.

The Managers will be responsible for determining how many and which hours his/her library will cover and will notify the Schedule Administrator who will make out the master schedule. The schedule will be posted by the Schedule Administrator on the VR listserv. The master schedule for the libraries will be posted showing the libraries’ times in blocks. It is up to the Managers if they want to post the librarian’s name in the master schedule. The Manager will do the scheduling for his/her own librarians within the blocks for their library. Occasionally, the Schedule Administrator will ask if a library is able to modify its requested schedule in order to accommodate overall service needs.

   3. Shifts
      Shifts will be selected by the participating librarians and will be 1 to 4 hours long. Ideally, two librarians from different libraries will be assigned to each shift.

      The schedule will list specific times for each shift to begin and end. Librarians will not be able to set alternative beginning and ending times for their shifts. Librarians should make every effort to be prompt in signing on for their shift so the librarian they are replacing is not inconvenienced. Librarians should stay signed on and available until their shift is completely over.
4. 24/7 Cooperative Coverage
The 24/7 Reference Cooperative will monitor the Michigan Academic Group during the hours when our own members are not on duty. Michigan Academic librarians covering 24/7 Reference Cooperative queue is a volunteer process. Librarians should monitor the 24/7 Reference Cooperative Queue while off the reference desk if at all possible.

5. Qwidget Roll-Up and Answering Percentage
The 24/7 Reference Cooperative librarians from outside of Michigan will be able to pick-up our qwidget questions (“qwidget roll-up”) as long as we maintain a 75% answering percentage. The answering percentage is defined as the total number of questions we answer divided by the number of questions requested by our patrons, whether qwidget questions or not. While it is important to answer as many questions as practical to maintain a 75% answering percentage, we should not sacrifice the quality of our answers to pick-up more questions.

6. Shift Trades & Replacements
Finding a replacement will be the responsibility of the local manager for the librarian that was assigned to the shift. The librarian will consult with the library’s VR Manager who will be responsible for seeing that hours assigned to that library are covered.

Librarians will follow these steps for shift trades and replacements:
   a. When you first realize that you will not be able to provide VR coverage at a certain time, please contact your VR Manager and try to resolve the situation within your own library.
   b. If that doesn’t work, then please send a message to the collaborative listserv using this address: Virtual_reference@mail.mlcnet.org
      Please use this as the subject line: Sub Needed: (then list the day/time). In the body of the message give a further explanation if necessary. When you send the message it will be delivered to all the VR providers.
   c. Responses to your request will go directly to you. When you find someone to sub for you, please post another message to the collaborative listserv (using the same address above) with the subject line: Sub Found (then list the day/time). In the body of the message indicate the name and school of the replacement provider.
   d. If no one responds to your request, please send a message to the collaborative listserv (using the same address above) with the subject line: No Sub Found (then list the day/time) to alert all providers of the upcoming absence.

Verifying that shifts are covered:
   a. The Manager is responsible for checking that his/her own librarian(s) is working as scheduled. They may be able to resolve technical issues.
   b. If more than one person is scheduled for a shift and one librarian notices the other isn’t on, they can phone/email the other library’s Manager to find out why. To determine which librarian is scheduled for either Eastern Michigan or Michigan State, contact the applicable Reference Desk or their manager. Most other libraries have indicated the assigned librarian on the posted schedule.
c. A librarian can view who’s currently signed on by selecting the “Librarians” tab in the Librarian Chat Monitor or by clicking on the “Chat Monitoring Tool” on the MyQuestionPoint page.

7. Login to Your Scheduled Shift
Being present for a shift is just as important in virtual reference as it is on the reference desk. The Collaborative emphasizes that librarians realize the importance of logging in for shifts promptly. Before logging off from your shift, make sure that your replacement has logged on. To view who is logged on:

a. Click the “Librarians” tab to see who is logged on.
b. If your replacement has logged on, logoff from the Chat Monitor.

What to do if your replacement has not logged on:

a. Go to the Intranet to view the calendar
b. View the calendar, and identify which library/librarian is to sign on next. Our calendar provides some of the names of the librarians scheduled for a shift.
c. Go back to the Chat Form, wait 5 minutes.
d. If no one has signed on, send an email and call the librarian if the name is provided in the schedule or to the library’s VR Manager. A list of phone numbers and emails can be found on the Intranet Librarian Contact spreadsheet.
e. Wait 10 minutes. If you are able to continue monitoring the service, please do so. Otherwise, logoff from QuestionPoint after ten minutes.

What to do if your campus has lost Internet connection or power before or during your scheduled VR shift.

a. Call the other library currently scheduled to monitor VR with you during your shift. Explain your situation.
b. If you are the only librarian scheduled to monitor VR call Sara Memmott.

Managers should make sure that all librarians have a copy of the schedule and master list of VR librarians available at all times to immediately report any Internet or technical problems to another librarian. The schedule and master list of VR librarians are available on the RHN Intranet.

8. Checking for Sessions That May Need Attention

After you launch chat and are waiting for calls, take a minute to return to the My QuestionPoint page and check the following links under Question Lists:

- New
- Unassigned
- Shared Follow Up
Under the New and Unassigned categories, claim and respond to any questions that come from your library’s patrons. Under Shared Follow Up, claim and respond to any questions from your library’s patrons. In this category, you may also claim and respond to questions from another library’s patrons if the question was submitted more than 24 hours ago and is one you feel you can answer.

B. Handling Calls
Librarians are not required to help more than one person at a time. Even during busy times take only as many patrons as you feel comfortable to handle. QuestionPoint software does not inform a patron when all available librarians are currently busy with another patron. Since the patron will not be notified that the librarian is busy helping another patron, you may want to pick up the call and inform the patron to hold on a minute, or call another librarian to login to Chat Monitor to assist the patron.

When responding to a call, VR librarians may:
- Respond to the call
- Transfer chat session to another online librarian

1. Responding to the call
   a. VR librarians should pick up calls within 30 seconds. VR librarians are expected to use professionalism with every patron. See Appendix I on Best Practices.
   b. Average length of a session varies by type of question. VR librarians may use their own judgment in this area.

2. Transfer the call to another online librarian
   a. VR Librarians may sometimes determine that it is appropriate to transfer a patron to another online librarian from the patron’s home library if possible. Such reasons may be:
      - The question is very specific to the patron’s home institution
      - Another librarian on the shift has noted that he or she has expertise in the question area
      - The question will take a while to respond to, and the librarian’s shift has ended
   b. The VR librarian who plans to transfer a call should first check the “Librarians” tab to make sure that the other VR librarian is online and free to take the call. The transferring librarian should then call the other librarian to let him or her know that a call is being transferred and why. Librarians can also use the internal IM option within the Chat Form to first communicate with the other librarian about transferring a call. If this is not possible, the original librarian should not transfer the call but suggest that the patron email his/her home institution or assign the resolution code “Follow Up by Patron’s Library.”
   c. To transfer a call, select “Transfer” button.
1) Once this is selected, located in the bottom right corner under Transfer Request will be a list of the Transfer To librarians. Click on the librarians name to transfer the call.

2) You will have the option to IM the librarian with a message to transfer the call. Use the IM option if you have not already contacted the other librarian. Chat with the librarian. If the receiving librarian agrees to transfer, click the Transfer button. If the receiving librarian says no, click the Cancel button.

3) Once you have clicked Transfer, you will receive a message “Chat Session Ended” and click “Close” button to return to Chat Monitor.

d. The receiving librarian will respond to the IM message by clicking on the pop-up “new IM request has arrived.”

1) The receiving librarian will click on the green IM link at the top of the chat monitor form to pick the IM message and respond to yes or no to transfer the call. End the IM session and wait for transfer.

2) The receiving librarian will receive a pop up with “New transferred chat session in I Active” tab “Please respond to the patron” message. Click OK

3) Click on “My Active” tab and click on the patron’s name to receive the call.

4) Start chatting with patron and “End Session” when finished.

C. General Reference Session Guidelines

1. Chat guidelines
   • Establish and maintain a professional, respectful, friendly tone.
   • Use standard English grammar and punctuation during transactions. Avoid chat icons and chat abbreviations such as LOL frequently used in informal chat.
   • Avoid SHOUTING. Do not capitalize entire words.
   • Use shorter sentences when possible. Break long messages into shorter segments. Indicate that more is on the way by ending the message with three periods (...).
   • Send a message to patrons periodically during pauses in the flow of chat or co-browsing. Keep patrons informed of what is happening or what you’re doing.
   • Use scripted messages appropriately; avoid an over reliance on them.

2. The Reference Interview
   • Virtual Reference Best Practices – See Appendix II.
   • Successful Reference Communication Strategies – See Appendix III.
D. Ending Sessions/Closing Calls


- Ask the patron if you can help them with anything else, and invite them to use their library as well as Research Help Now again in the future.
- If possible let the patron log off first.
- Sometimes patrons disconnect right away or they don’t wait for the entire answer. If possible answer the question to the best of your ability in case they access the transcript later. (Occasionally, patrons appear to have disconnected when they have not.)
- Do not take early disconnects personally. If you have not heard from a patron in a while, send 3 prompts one-two minutes apart before logging out. Examples of prompts:
  - “Is this what you are looking for?”
  - “Is that enough information?”
  - “Are you still with me?”
- If no reply: “Please send me a message to let me know you are still connected.”
- After 3 prompts / 3 minutes with no response from patron, it may be necessary to log off.

2. Ending a Session. Closing properly is important, so the patron will receive their transcript quickly.

- Encourage the patron to close by clicking on the “Exit” button.
- Once the patron has ended the session, the message “The patron ended this session” appears in the Librarian’s chat box. Click “End Session.” Complete the resolution code and descriptor codes and click “Close.”
- The Librarian has the option of closing a call before the patron by clicking on the “End Session” button. Once selected, the chat session is ended. The patron will receive a message that the librarian ended the chat session.
- Once the session is effectively ended, the patron will be allowed to leave the session or stay on to review their work. If the patron decides to stay in the session after you have left, they will only be able to review the session and will not be able to modify the transcript in any way. Patrons can also continue using the left page viewport to work online.
- End of Session Survey. The patron will be prompted, after ending a session, to complete a survey. The survey contains standard questions selected in the Question Point Administrative Set-Up.

3. Resolution Codes and Descriptive Codes

   a. Resolution Codes

   It is important to use a resolution code to end the session. If no resolution code is selected, then the session is assigned the default code of Answered. Use the codes as follows:
### Resolution Code

<table>
<thead>
<tr>
<th>Resolution Code</th>
<th>When to Use</th>
<th>Status in QuestionPoint</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answered</td>
<td>No additional information is needed by patron.</td>
<td>✅ Answered</td>
</tr>
<tr>
<td>Follow Up by Patron Library</td>
<td>In most cases, use this code anytime Follow Up is needed.</td>
<td>?? Shared Followup</td>
</tr>
<tr>
<td></td>
<td></td>
<td>?? New for the patron’s library</td>
</tr>
<tr>
<td>Follow Up by Me</td>
<td>Only use this code if you (the chatting librarian) have information at hand which will thoroughly answer the question. When you use this code, you are responsible for the follow up. Be sure and either send the follow up through QuestionPoint, or add a note that follow up has been done.</td>
<td>?? New for you and your library</td>
</tr>
<tr>
<td>Lost Call</td>
<td>If the patron never responds and does not have an email address. <em>Do not use Lost Call if the patron left an email address; instead, use Follow Up by Patron Library.</em></td>
<td>✉️ Closed</td>
</tr>
<tr>
<td>Practice</td>
<td>Use for practice sessions</td>
<td>✅ Answered</td>
</tr>
</tbody>
</table>

Source: [http://www.questionpoint.org/policies/bestpractices.pdf](http://www.questionpoint.org/policies/bestpractices.pdf)

### Descriptive Codes

The librarian may also select up to 4 descriptive codes to categorize a session for statistical and planning purposes. Each library decides whether to use the codes and how to use them. If a library uses descriptive codes, it should use them only for its own patrons. Librarians answering questions for other libraries’ patrons should not select descriptive codes because the codes may be used differently by each library.

If a librarian assigns a code incorrectly, you can change it in the Full Question (page with complete transcript). You can change a code by selecting a new one or you can add codes if fewer than four have been assigned. However, you cannot delete an assigned code.


### Additional Information

Assign the Resolution Code “Lost,” only when the patron does not respond at all. If the patron added only one word to chat and provided an email address, assign the code “Follow Up by Patron Library.” This ensures that the patron’s request doesn’t get lost.
Assign the resolution code “Follow Up by Me” only when you are the one who will be following up with a patron after a session has ended.

4. Follow-up Emails in Event of Technical Difficulties
Assign all dropped calls due to technical difficulties “Follow Up by Patron’s Library” and follow the procedures under Section 2 H. Follow Up of this Manual.

You may also send an email to the patron with the following information:

Hi (student’s name),
A few minutes ago you tried to access Research Help Now with a question about [fill in topic]. I connected with you in the system, but then you seemed to lose connection. I tried again to pick up your call, but couldn’t retrieve you for some reason.

I’m very sorry about the technical difficulties! Perhaps you’ve already been able to get research assistance from another librarian. But if not, and if you still would like to have some assistance in researching this topic, please try contacting Research Help Now again at http://www.researchhelpnow.org/

Or you may like to phone your home college library at the following numbers:

[name of college] Reference Desk Phone numbers:
[fill in numbers]

Good luck with your research [student’s name]!
[close with name of librarian]

E. Guidelines for Answers and Information Resources

1. Appropriate Communication Methods
Librarians are not obligated to use only Research Help Now to complete a reference transaction. Do not hesitate to use other forms of communication, such as telephone, email, fax, as well as referrals, if they would be more appropriate. It is good to inform the patron if the process could take a while and plan to switch forms of communication or if they will be contacted by another form of communication (specify).

2. Library Policies Link in Chat Form
The Policies link is a feature in the Chat Form for librarians to consult when assisting a patron from another library. The Policies link will contain information about the specific library created by the VR Manager in the QuestionPoint Administrator Module.

It is the Manager’s responsibility to keep the information up-to-date. The Policies page should be periodically reviewed for updates. Report any corrections to the library’s VR Manager for updating in the QuestionPoint Administrative Module.
3. **Information Resources**

When assisting patrons from an institution that is not your own, use the patron’s own institution’s databases as the primary resource.

a. Internet
   - Occasionally, the home library web site may have local pathfinders with web links useful for the student’s assignments. See the “Policies” page “Research Guides” field.
   
   Examples:
   - Lansing: http://libguides.lcc.edu/
   - Oakland: http://www.oaklandcc.edu/Library/subject_guides.asp

b. Library Catalog
   - In this case, the student’s local library catalog may be best.
   - Use the link to the student’s college library catalog on the Policies page.
   - MeL Catalog currently includes the holdings of Eastern Michigan University, Jackson Community College, Kellogg Community College, Lansing Community College, Michigan State University, Oakland Community College, and Washtenaw Community College, among our members.
   - MeL Catalog can be used as a referral tool. http://elibrary.mel.org/

c. Databases
   1. Using the patron’s own library databases:
      - First, check the login directions on the Policies page. For some libraries there are **unique URLs for database access pages in VR** to use instead of the standard access through the library’s homepage. The Policies page will provide a direct URL link for each library’s databases. Also, check the collaborative URL scripts.
      - Have the patron log into the database using their own password.
      - If a patron has trouble authenticating, help on how to obtain a password from their library is given in the Policies page.
      
      **NOTE:** Do **NOT** give a patron a password. The “Database Information” on the Policies page for each library is for librarians to authenticate themselves and for testing purposes only.

   2. Statewide databases available via MeL:
      - Select “MeL Databases” from the URL scripts list on the Chat Monitor screen.
      - Select a subject of your choice and click on the name of one database. This will enable the librarian to go directly into that database’s interface without having it come up in a new window. This is preferred to using the federated search engine at the “Search Multiple Databases” button, otherwise known as “MeL Advanced Search”.
      - Have patron enter their Michigan driver’s license.
      - Free information from the Web.
      - Other appropriate print resources
F. Miscellaneous Guidelines

1. **Dealing with Difficult Patrons**
   If a librarian considers a patron’s messages to be offensive or inappropriate, he/she will first ask the patron to stop the offensive behavior. If the patron persists, the librarian will send the following message: “Your message constitutes inappropriate behavior. I am ending this transaction and saving a copy of the transcript. I have also recorded your email address.” Then end the session. Follow the guidelines set by the QP 24/7 Policy on Types of Patrons section 4.5 at http://wiki.questionpoint.org/247-Policies

   If a patron appears to be more interested in chatting than finding information, the librarian will ask what course the information is for and try to bring the patron back to the reference interview. If the patron has no real information need, the librarian will remind the patron that the service is for helping students find information and tactfully end the session.

2. **Personal Opinions**
   Personal opinions are best kept to ourselves. It is good to show patrons a variety of viewpoints so they can draw their own conclusions.

VI. **Information for Managers**

**A. Managers Tasks**
It is the responsibility of the Managers to learn and routinely execute these functions:

1. Create IDs for each of the VR librarians at your institution.
2. Assign librarians to Group in ADM Module. [see additional information below]
3. Set-up library profile in QP and keep it up to date.
4. Create local message and URL scripts. See section on Adding Local Scripts below.
5. Conduct training of your local VR librarians as needed.
6. Arrange your local librarians’ schedule for the collaborative shifts in conjunction with the Schedulers. For more information, see Section V.2 on page 11.
7. Check that your own librarian(s) are working as scheduled.
8. Follow-up on any shift schedule dilemmas that may arise.
9. Be able to view transcripts.
10. Ensure that your librarians have access to all needed plug-ins (Flash 9 or higher) on their computers.
11. Test the access to your library’s databases in the system. Work out problems with OCLC technical support.
12. Update Policies page as needed. See section D Policy Updating below.
13. Try to resolve technical issues if possible. Relay information about technical troubles experienced by local librarians to the RHN Administrators.
14. Check Shared Follow Up, New, and Unassigned question lists daily and assign Follow Up questions. [see documents QuestionPoint Reference Followup and Handling QP Transcripts for Managers on Intranet].
15. Run local statistical reports.
17. Qwidget Form Setup
18. Chat Form Setup

B. Which URL to post for RHN Link on Your Local Library Web Site
When setting up a local RHN link, libraries have a choice about which URL to use. If the www.researchhelpnow.org URL is used, the patron will get directly to general information about RHN and be able to link into live chat if the service is open or send an email if it is closed. If it happens that the student’s or librarian’s connections into OCLC Question Point aren’t working for any reason, then the student will still be able to read the general information about our service and get the links to email. The second option is to use the direct URL to the patron entry page for your library. Use the URL available on the RHN sites that links to QP for your library.

Information on how to create a link is located on the RHN Intranet.

C. Adding Local Library Scripts (p. 9 Institution Administrative Set Up in QuestionPoint Administrative Set Up Manual)

Note: There are three levels of scripts and URLs:
1. Individual – each librarian will enter their own personal message
2. Institutional – Managers enter the information – follow steps below
3. Group “shared” level – Ann and Sandy will enter this level

Steps:
1. Upper right corner  click on “Ask” link from drop down menu
2. Click on “Settings” tab.
3. Click on “Institution’s Scripts” tab
   a. In this section, you decide what scripts to create and make available to your librarians. Just remember, when another librarian picks up your patron, these institutional scripts go along with the patron. Also, keep in mind that these scripts might help another librarian.
   b. Enter the name of script
   c. Enter the script
   d. Click Add

Add as many as you want. Once the scripts have been added, they will be listed at the bottom of page. You have the option of removing them. If you would like the scripts to be listed alphabetically, they must be entered in that order. The order cannot be altered once they are input (unless they are deleted and completely reentered).

4. Click on “Institution’s URL Scripts” tab
a. Same info about Scripts here. Managers will add institutional scripts.
b. Enter the name of script
c. Enter the URL
d. Click add

Add as many as you want. Once the scripts have been added, they will be listed at the bottom of page. You have the option of removing them.

NOTE: Notice that if you want to create your own personal script, you click the tab My Scripts and My URL Scripts. The librarians can come here to add a personal greeting message.

It is recommended that everyone add the following personal welcome script:

Welcome to Research Help Now. My name is [fill in your name], a librarian at [fill in your institution]. I’m reading your question and will be with your very soon.

D. Updating Your Library's Profile
To find the section where updates can be made:
1. Upper right corner click on “Ask” link from drop down menu.
2. Select “Profile”.
3. Click on tab “Institution Services”.
4. Click on “Policies” link.
5. Click on “edit” for any sections being updated. Insert html code for text and hyperlinks.
6. Save.
7. It is recommended that each library manager review and update library profiles on a semester basis.

E. Groups
VR library Managers will assign the appropriate Group to each librarian in the Administrative Module. All colleges and universities will select the Michigan Academic Group. If individual librarians have volunteered to monitor the 24/7 Reference Cooperative, their manager will assign them to the both groups in their QP profile.

To set up groups for individual librarians:
1. Login to QP
2. Select Administration from drop down menu
3. If this is a new librarian, complete the immediate page, name, email, screen name, and leave TYPE as local, with Michigan Academic Group in left box. To add 24/7 Reference Cooperative coverage to the librarian profile, select TYPE global, all 24/7 Reference Cooperative libraries will be moved over to the left box.
4. Click Submit

For the Michigan Academic Group, from the Research Help Now webpage, each college and university’s name will be a hyperlink to the QuestionPoint Chat form. When a patron selects
their college or university, an asterisk next to their name will appear in the librarian’s chat monitor screen to identify that a librarian from their home library is currently monitoring the system. This will help match a patron to their home librarian.

In addition, the patron entry form will include a drop down institution list for patrons to select their college or university, or select other or MCCVLC from the list.

After a librarian logs into Chat, they will be prompted to select their queue to monitor.

F. Practice Group
The Practice Group has been created for ongoing testing and training for all librarians. After a librarian logs into Chat, they will be prompted to select a queue. Check “Practice” from the list. The practicing patron should use the link on the MyQuestionPoint page called “Chat Patron Practice Form” as their patron entry screen for practice sessions.

The librarian should enter the resolution code “practice” when ending your practice session. You can also select the descriptor code “test.”

G. Class Demonstrations
If an instructor would like to schedule a demonstration for their class or other group, they should contact their local library Manager at least a week in advance. It is preferred that they ask their students to stagger their individual sessions to Research Help Now, so that the two librarians typically on duty at a given time will not be overwhelmed. Or, if the class is together in a single physical location, one session could be established to demonstrate the service.

An option for a group demonstration would be to create a PowerPoint demo using screen shots of a live session.

H. Followup Set-Up for Managers

VR Managers need to set up their library profile for follow-up. Managers should make sure they have completed this task for the following reasons:

1. It ensures that the Manager is notified when a new question or chat transcript needing follow-up arrives in your library’s account.
2. It allows the Manager to add a second email address so backup is available if the Manager is away.
3. It permits QuestionPoint to add a patron’s reply to the question history when a patron replies to a chat transcript, answer or clarification request.
4. It allows the library to customize the email “From:” address that patrons see when they receive an email reply from QuestionPoint.
I. Qwidget Form Set-up

QuestionPoint introduced the Qwidget (widget form of IM service) in March 2008. The Collaborative has left it up to the individual library to implement the Qwidget. There are some limitations to the Qwidget:

- It is only a chat service, no co-browse function
- Must select “require email for Qwidget chat” in set up to force patrons to provide email address (if desired)

How to set up the Qwidget

ADM → Forms → Forms Manager → Create Qwidget

Create the Qwidget by completing the form, click submit, and copy and paste the html code and send to your individual library web administrator.

The Qwidget form has a field for “offline message,” for when the service is closed, but since the 24/7 Reference Cooperative is able to see Qwidget questions, it is not necessary to enter a closed message that points patrons to the Research Help Now site for immediate assistance. You may still want to enter a message in the field.

Sample wording for closed message:
“XXXX Librarians are currently not available. You may submit a question to an academic Librarian 24/7 by going to http://www.researchhelpnow.org.”

1. Create Custom Qwidget Skins and Formatting
   Follow the directions in the Qwidget creation page in the ADM.
2. Mobile Webkit Qwidget
   1. Only available for iPhone, Android, and Palm
3. Qwidget for Facebook
   1. Login to the RHN Intranet for Question Point Qwidget for Facebook instructions. You need complete a Qwidget on a public web server in order to create a Facebook version of the Qwidget.
   2. Once you create a Qwidget, contact David Leslie at leslied@oclc.org

J. Chat Form Set-Up

QuestionPoint allows SUP libraries to customize the “Chat Look and Feel” and the “Chat Closed Page” screens. All Form fields are set by the BME for the chat form.

How to set up chat form:

1. The VR manager logins to Question Point
2. ADM → Forms → Forms Manager → Chat Sessions and URLs

You have the option of customizing the “Define Chat Look and Feel” and the “Chat Closed Page.”

1. To customize your page, start on the link “define chat look and feel” and select Edit next to the form you want to customize (they are only in English). Click Save. Then click Return to chat settings and URLs.

2. The Chat closed page will offer you a chance to edit the message that appears if the service is not working. We are 24/7, so this would be a rare occasion! You may edit the words in the left box and can include html if desired to embed a link, such as directing them to your library’s general Ask a Librarian page. Edit, the click Save. Click Return to chat settings and URLs. Please note: you may receive the following message on a blank page “null.” If you get this same message, please email Sandy

3. When you are ready, click on publish chat form look and feel. By the way, after clicking publish chat form look and feel, you go back to change something, you need to click on publish chat form look and feel again.

At the bottom of this page your will find two versions of the chat form. Click on view to see how they appear.
- “Chat” which is text only. This is for an ADA compliant form.
- “Chat with viewport and cobrowse check”. This is the frames format we have been using.

4. Email Sandy the URL to be added to the http://www.researchhelpnow.org site. You will also want to use this link on your library website to provide access to “Chat with viewport and cobrowse” or “Chat” ADA compliant form.

K. E-mail Webform Set-Up

QuestionPoint offers an optional E-mail Webform. This enables the library to offer email reference to users. The questions come in through the Ask/Active question list. Email questions can be referred and tracked the same as chat questions. Statistics for email questions display in the sessions report for your institution.

To set this up, sign into your administrative account.
- From the MyQuestionPoint page, select “Administration” in the dropdown menu in the upper right.
- Go to Forms/Form Manager/Create Question Form.
- Working from top to bottom, go through each link, filling in your desired settings, and saving each before proceeding.
- On “Define e-mail look and feel”, the banners can be created. You can link to a banner which has already been created for your library or college.
- On “Select the fields you want to appear”, the edit option on some fields allows you to insert hypertext.
- After clicking “Publish e-mail form”, you will be given an URL to copy and paste into your website.
- For more information, ask Ann or Sandy.
L. How to Do Statistical Reports

Various statistical reports can be run in QuestionPoint for management and quality assurance purposes. Local VR Managers may want to run institution-specific reports for their own libraries.

An example would be a chart of number of chat session features including hour of the day for your library. Practice sessions have been weeded out of this report. Follow this thread to run the report: [log into your library’s admin account]
Click Reports tab > Institution Report > Monthly, date, chat; submit. It can be exported into Excel.

To export into Excel using FireFox:
1. Open Excel
2. In QuestionPoint, highlight the table
3. Copy the content, CTRL C
4. In Excel, right click in cell, select Paste Special, Uniform Code

To export into Excel using Internet Explorer:
1. Open Excel
2. In QuestionPoint, highlight the table
3. Copy the content, CTRL C
4. In Excel, right click in cell, select paste

The chart below shows the regular reports that will be run and the paths to follow to run the reports (under “Report Name / Location”). Some can only be run at the BME Administrative level.
## Research Help Now
### QuestionPoint Statistical Reports
#### As of 3/2012

<table>
<thead>
<tr>
<th>Topic</th>
<th>Report Name / Location</th>
<th>Who compiles</th>
<th>How often</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chat sessions by institution – sessions conducted by librarians at those institutions and by 24/7 librarians</td>
<td>“Reports by Sessions” Reports &gt; Institutions &gt; Reports by Sessions</td>
<td>Ann/Designee</td>
<td>Monthly</td>
</tr>
<tr>
<td>Chat sessions by institution – sessions conducted with patrons of those institutions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chat sessions by day of week</td>
<td>Custom report combining days of week with hours of day from OCLC</td>
<td>Sara, or managers as needed</td>
<td>Monthly</td>
</tr>
<tr>
<td>Chat sessions by hour of day</td>
<td>Alternate, partial method: “Report by Single Subscription Group” Report &gt; Institution &gt; Institution Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chat sessions accepted via Qwidget</td>
<td>Reports &gt; Institution &gt; Librarian List &gt; select Number of Chat Sessions Accepted via Qwidget</td>
<td>Manager</td>
<td>Monthly</td>
</tr>
<tr>
<td>Chat sessions by Resolution Code</td>
<td>“Resolution Codes” Reports &gt; Resolution Codes</td>
<td>Manager</td>
<td>Once a semester</td>
</tr>
<tr>
<td>Chat sessions by Descriptive Code</td>
<td>“Descriptive Codes” Reports &gt; Description Codes</td>
<td>Manager</td>
<td>Once a semester</td>
</tr>
<tr>
<td>Form Field Report</td>
<td>“Form Fields” Reports &gt; Form Fields</td>
<td>Ann or managers</td>
<td>As needed</td>
</tr>
<tr>
<td>Lost calls (technical problems)</td>
<td>“Resolution Codes” Reports &gt; Institutions &gt; Resolution Codes</td>
<td>Sandy</td>
<td>Weekly</td>
</tr>
</tbody>
</table>
VII. 24/7 Reference Cooperative

A. Background Information

The Collaborative agreed to join the 24/7 Reference Cooperative (the “Cooperative”) with the renewal of our 2009-2010 Contract beginning in August 2009. RHN went live with 24/7 Cooperative participation in October 2009.

The Cooperative provides an around the clock reference service, built by a cooperative of participating libraries. Libraries agree to answer questions for each other in real time, using our virtual reference software. There is an academic cooperative and a public cooperative.

The Cooperative helps supplement your hours of service by being available to your community 24 hours a day, seven days a week, including holidays. [Definition taken from 24/7 Cooperative Wiki]. Although all participating members pay to for 24/7 Cooperative membership, it is optional for librarians to monitor the service.

24/7 Cooperative Wiki http://wiki.questionpoint.org/24+7+Coop+FAQs

B. How to give access to the 24/7 Cooperative Queue

1. Login to QP
2. Select Administration from drop down menu
3. To add 24/7 Cooperative Coverage to the librarian profile, select TYPE global, all 24/7 Cooperative libraries will be moved over to the left box.
4. Click Submit

C. Individual Institution Policy Page

Follow the guidelines set up by the 24/7 Cooperative located at http://wiki.questionpoint.org/Policy+Page+Guidelines

D. Schedule

Our Collaborative is required to cover 35 hours of 24/7 Cooperative hours. The Collaborative schedule liaison will ask for volunteer times/dates.

E. Best Practices

The librarians will follow the 24/7 Cooperative Best Practices Guidelines at http://wiki.questionpoint.org/247-Best-Practices when answering 24/7 Cooperative questions.
F. Policies and Procedures

The librarians will follow the 24/7 Cooperative Policies and Procedures
http://wiki.questionpoint.org/247-Policies

VIII. Contacts

A. Reporting Technical Problems

Librarians shall report all technical difficulties during a Virtual Reference session to their VR Manager first. If unavailable, the librarian may need to contact OCLC customer support at support@oclc.org or call 1-800-848-5800. Librarians can also report problems via the online form at http://www.questionpoint.org/ then click on Support Request and Feedback Form. If possible include an image of the problem. Here are the steps for how to get copy an image

1. Click “print screen” on your keyboard
2. Open email, paste (control V) into message and send to support@oclc.org

OCLC Support may also request the “About” information from your chat session. Here are the steps for how to get the “About” information:

1. Right click on the chat monitor
2. Select About
3. Click “Copy to clipboard”
4. Paste the clipboard into an email message and send it to support@oclc.org

B. Troubleshooting Guide

See OCLC Question Point documents for guides on technical issue and set-up at http://www.questionpoint.org/support/documentation/gettingstarted/index.html

C. Disconnect

How do you pick up a disconnected customer? If a customer disconnects inadvertently, is there a way, after they call back, for the same librarian to pick up the call?

Once the connection is broken the session is over. When the customer reconnects they are starting a new session and the system will pick the most appropriate provider for them.

IX. Emergency Closing Procedure for your Library/Campus

A. Should your College/University close for any reason:
1. If possible, send an email to the Collaborative listserv with the information about the closing and anticipated reopening. Send to Virtual reference Virtual_reference@mail.mlcnet.org
2. In the subject line enter name of college/university closed date
a. For example  Washtenaw Community College CLOSED March 12, 2012
3. In the body of the message, provide an explanation as to what is going on.
4. Also inform the group if there is an impact on your VR shift. You are still able to cover VR from home or not.
5. Send to listserv.

B. When you library/campus is open for business
1. Send email to the listserv with an update
2. In the subject line enter name of college/university open date
   a. For example  Washtenaw Community College OPEN March 12, 2012

C. You may also want to update your POLICY PAGE ALERT SECTION WITH THE INFORMATION since we are part of a 24/7 Coop
   1. Login to QP
   2. Upper right corner click on “Ask” link from drop down menu.
   3. Select “Profile”.
   4. Click on tab “Institution Services”.
   5. Click on “Policies” link.
   6. Click on “edit” for any sections being updated. Insert html code for text and hyperlinks.
   7. Save.
   8. It is recommended that each library manager review and update library profiles on a semester basis.

X. Policy and Procedures Updates

A. The Manual represents the policies and procedures for “Research Help Now” that are in effect at the time of publication.
B. The Manual will be reviewed periodically by the Policy Services Sub-Committee.
APPENDIX I  Virtual Reference Best Practices Checklist

Virtual Reference Best Practices
(Draft Compilation of 25 Feb 2005 & 1 March 2005 MCCAVR Quality Training Sessions)
(Updated to reflect QuestionPoint 9/13/07)

Introductions

__ I connected to the student promptly (within 30 seconds).

__ I read the patron profile information first.

__ I recorded the patron’s name, institution and email, in case we got disconnected.

__ I noted whether the patron had the ability to cobrowse.

__ I sent an initial scripted greeting similar to:

  “Welcome to Research Help Now. I’m [name], a librarian from [institution]. I’m reading your question and will be with you very soon.”

__ I restated the patron’s topic.

__ I asked how much time the patron had.

__ I asked whether the patron would like to learn by doing or watching.

__ I asked how experienced the patron was in doing research online.

__ I asked open-ended questions about the patron’s research.

__ I asked what assignment or project the patron was working on.

__ I asked what type of resources the patron could use.

__ I asked what sources the patron had checked already.

__ I asked when the assignment or project was due.

Traditional Reference Skills

__ I established and maintained a professional, friendly tone.

__ I tried to match my tone and pace with the patron’s.
I avoided using too much library jargon and explained unfamiliar terms.
I suggested improved search strategies, if necessary.
I provided more than one type of resource, if appropriate.

New Virtual Reference Skills
I used standard English grammar and punctuation.
I used shorter sentences when possible and broke longer messages into shorter segments.
I used the patron’s name often.
I explained how the patron could enlarge his/her viewport.
I explained to the patron what I was going to do before I did it.
I explained why we did what we did as well as what.
I asked the patron plenty of questions throughout the session to get feedback.
I responded often so the patron knew I was there.
I advised the patron that if a new window opened, he/she resize it in order to continue seeing the chat area.
I frequently asked what the patron was seeing, especially if we were not cobrowsing.
I made appropriate use of scripts/FAQ texts for consistency.
I observed policies in the Research Help Now policy manual.
I used other communication methods (email, phone, etc) as appropriate to aid the patron.

Wrapping Up
I asked the patron if he/she was happy with the results of the session.
I encouraged the patron to come back for more help if necessary.
I encouraged the patron to close by clicking on Exit.
I encouraged the patron to complete the patron survey.

If possible, I let the patron disconnect first.

Developed by Debby Harris for the Research Help Now Collaborative. Rev 9/07
APPENDIX II  Qwidget Best Practices

The Qwidget format presents some additional factors to consider when working with Qwidget patrons. Below are best practices to use when you work with those patrons.

1. Since it is optional for libraries to require an email from the patron, check the Info area to see if an email address was submitted.
2. If it was not submitted, mention early in the session that if patrons want transcripts, they should click on the envelope under the send button and add their email address. It’s preferable to do this early in the session in case patrons leave abruptly or you are disconnected. (At the end of a session, when the librarian and patron close the session, patrons receive an “Email session transcript” link that also permits them to leave an email address.)
3. Before you send patrons a URL, explain that when they click on the URL a new page will pop up and cover the Qwidget. Ask them to move the new page so they can still see chat messages in the Qwidget.

Developed by Debby Harris for the Research Help Now Collaborative, 2008; updated 2012.
## APPENDIX III Successful Reference Communication Strategies

**Successful Reference Communication Strategies**
Compilation of 25 Feb 2005 & 1 March 2005 MCCAVR Quality Training Sessions
(Updated to reflect QuestionPoint 1/08)

<table>
<thead>
<tr>
<th>Behavior Area</th>
<th>Face-to-Face Communication Strategies</th>
<th>Additional Virtual Communication Strategies</th>
</tr>
</thead>
</table>
| **Approachability** | - Establish eye contact  
- Friendly greeting  
- Remain visible  
- Offer help proactively | - Pleasant design, user-friendly, accessible  
- Links to service in as many places as possible (Logo – available in many places)  
- Log in for shift in a timely manner – be there a few minutes early  
- Friendly email style – being friendly from the get-go sets the tone  
- At initial login, use a friendly script  
- Use patron’s name as often as possible  
- Repeat the question to be sure you are clear on what they need  
- Anticipate pages, windows on patron’s side & warn them ahead of time |
| **Interest** | - Appear unhurried  
- Nod in response  
- Maintain eye contact | - Keep responses short & concise &/or use ellipses...to break up longer sentences or at end of sentence  
- Check how much time patron has available  
- Give feedback & response to every comment & question & action(s) by the patron  
- Need to communicate more often because patrons can’t see your body language—keep them updated on what you’re doing (use scripts)  
- Use encouraging comments – ‘good job!’ You’re doing fine. That’s a good idea...  
- Use empathetic responses – that’s tough – let’s see what we can figure out  
- Don’t over-rely on scripts  
- Check to see if they can see every page – double-check the technology |
| **Listening/inquiring** | - Rephrase question  
- Clarity terminology  
- Use open-ended questions | - Make sure you watch the chat area for new messages from the patron  
- Use patron info tab to gather information (check name, email, school, question)  
- Ask how patron will use this information  
- Ask how much information they need  
- Ask what kind of sources  
- Keep dialogue moving / build rapport  
- Use all face-to-face strategies as listed in chart  
- Warn patron before pushing pages & research database |
<table>
<thead>
<tr>
<th>Searching</th>
</tr>
</thead>
</table>
| • Find out what patron has already tried | • Ask, would you like me to show you how I do that search or would you like to do it as I guide you? Give them a choice of learning by doing or learning by watching  
| • Develop appropriate search strategy | • Explain where you’re taking them – let them know beforehand & WHY!  
| • Explain how to use sources | • Explain search strategy  
| | • Provide a search path, repeat in words and give a full citation into chat part so when they get transcript they know which article you were looking at  
| | • Number steps in any process you describe  
| | • When co-browsing, add the URL to chat, so the patron will have a record in the transcript.  
| | • Use FAQs / scripts where appropriate  
| | • Have patron try the search and give support / corrective feedback during search process  
| | • Make referrals to appropriate sources  
| | • Give patron time as necessary to read & process information  
| Follow Up | 
| • Ask patron if information found so far helps | • Ask patron if session so far is OK – are we finding what you’ve been looking for—checking in mid-stream as well as at end. (Is your head nodding as I’m working with you?)  
| • Encourage patron to return if more help is needed | • Use a sign-off script that includes follow-up suggestions, phoning in, etc.  
| • Refer patron to other resources if appropriate | • Use a script to say, if there’s a long pause (technical difficulties), here’s how you can get back in touch  
| | • Include a statement in transcript to encourage follow-up  
| | • If we refer them to another librarian, be clear about who & why & get patron’s permission  
| | • Use whichever mode (chat, email, phone, walk-in reference) is appropriate, effective (& timesaving) – for patron!  

pages, etc.  
• Encourage patron to contribute ideas as much as possible  
• Match patron’s tone & pace as much as possible – check with patron about pace preference
Appendix IV  Research Help Now Organization

A. Administrators – Committees

VR Co-Administrators -- Sandy McCarthy (WCC) and Ann Walaskay (OCC)

Best Transcript Contest – New chair selected each year

Marketing – Stephanie Davis (NMC) and Jane Lewandoski (SC4)

Policy Committee – Sandy McCarthy (WCC) and Ann Walaskay (OCC)

Quality Assurance – Christine Tobias (MSU) and Hui Hua Chua (MSU)

Software -- Sandy McCarthy (Washtenaw); backup: Ann Walaskay (Oakland)

Scheduling – Sara Memmott (EMU)

Training –

Web Mastering – Sandy McCarthy (WCC)

B. Managers

Managers as of October 2011:

Eastern Michigan University – Sara Memmott
Jackson – Clifford Taylor
Kalamazoo Valley – Jim Ratliff
Kellogg – Kassie Lindsey
Lansing – Kelli Herm
Macomb – Mary Kickham-Samy
Michigan State University – Christine Tobias
Muskegon – Carol Briggs-Erickson
Northwestern - Mary Beeker
Oakland – Ann Walaskay
St. Clair – Jane Lewandoski
Washtenaw – Sandy McCarthy
Wayne – Ronghua Luo
C. Research Help Now Committees

FIPSE Library Design Team (2003-2004)
Marty Stilwell, Chair
Ann Walaskay
Sandy McCarthy
Denise Hooks
Kathy James
Debby Harris

RFI Committee (work completed): Marty Stilwell, Chair; Ann Walaskay, Sandy McCarthy, Debby Harris, Maggie Bacon, Kathy James, Denise Hooks, Teresa Prince

Advisory Board – A representative from each participating library consisting of the manager and/or the library director

There are five ongoing committees charged with recommending decisions for implementation to the VR Advisory Board.

Executive Committee: Sandy McCarthy, Ann Walaskay, Sara Memmott, and Christine Tobias.

Fiscal Agent: Midwest Collaborative for Library Services, Diana Mitchell
Appendix V
Research Help Now Michigan Virtual Reference Collaborative
Organizational Chart 2012
Index

A
Advisory Board, 40
Annual Meeting, 11
Answers and Information Resources, Guidelines, 20-21
Appropriate Communication, 20
Authorized Users, 6
B
Base Management Environment, 12
Best Practices Checklist, 33-35
Best Practices, Widget, 36
Best Transcript Award, 11
BME, 11
C
Calendar, 5
Call Resolution Codes, 17-18
Completed, 18
Follow-up, 18
Inappropriate Behavior, 20
Lost Call, 18, 19, 27
Out of Service Area, 17
Referred, 16
Test, 11, 12, 21, 24
Chat Guidelines, 17
Class Demonstration, 25
Clientele, 6
Closing Calls, 14
Collaborative, 4
Commitees, 36
Communication, 11, 19
Contacts, 31
Technical Problems, 31
Troubleshooting Guide, 31
Disconnect, 31
Copyright, 6
D
Databases, 5, 18-19
Descriptive Codes, 19
Difficult Patrons, 21
Disconnect, 31
E
E-mail follow-up, 17
E-mail Webform, 25-26
Emergency Closing Procedures, 31-32
Ending a Session, 16
Ending Sessions/Closing Calls, 18-19
F
Facebook, 10
Fiscal Agent, 5, 37
Follow-Up, 9, 15, 19-20
Follow-Up Set-Up, 25
Form, 26-27
Chat, 26-27
E-mail 27
QWidget 26
Free Reciprocal ILL, 6
Funding, 4
G
Groups, 11, 24-25
Groups, Monitor, 24-25
Guidelines for Answers and Information Resources, 20-21
Guidelines, Miscellaneous, 22
H
Handling Calls, 16
Responding to Calls, 16
Transfer/Conference Call, 16-17
History, 4
Holiday Hours, 5
Home Institution ILL, 6
Hours of Operation, 6-7
I
Information Resources, 21
Internet, 21
Library Catalog, 21
Databases, 21
InterLibrary Loan, 7
Intranet, 11
J
K
L
Librarians, 13
Library Policies, 20
Library Profile, 23
| Listserv | 11 |
| Collab, 11 |
| Login, Scheduled Shift | 15 |
| Lost Call | 19 |

| M |
| Managers, Information for | 22 |
| Tasks | 22 |
| Manual Updates | 32 |
| MCCVLC Group | 4, 5, 6, 24 |
| MeL | 18 |
| MeLCat | 7 |
| Michigan Community College Association | 4 |
| Midwest Collaborative for Library Services | 5, 10, 37 |
| Miscellaneous Guidelines | 22 |
| Difficult Patrons | 22 |
| Personal Opinions | 22 |
| Mission Statement | 4 |
| Monitor, Groups | 16 |

| N |
| Newsletter | 11 |

| O |
| Organizational Chart | 41 |
| Administrators | 39 |
| Managers | 39 |
| FIPSE | 40 |
| Advisory Board | 39 |
| Committees | 39 |
| Chart | 41 |

| P |
| Participating Librarians | 4 |
| Personal Opinions | 21 |
| Policies | 20, 24 |
| Practice Queue | 12, 24 |
| Privacy | 6-7 |
| Profile | 24 |
| Provider Groups | 11-12 |
| Definition | 11 |
| Groups | 11 |
| Assignment | 11 |
| Practice | 11 |
| Provider Survey | 16-17 |

| Q |
| Questions Addressed | 8 |
| Queue | 12 |
| Qwidget, Best Practices | 36 |
| Qwidget, Roll-Up and Answering Percentage | 14 |
| Qwidget, Set-UP | 24-25 |

| R |
| Reference Communication | 34-35 |
| Reference Guidelines | 12-20 |
| Reference Interview | 17 |
| Reference Session Guidelines | 17 |
| Referrals | 8 |
| Reports | 28-29 |
| Resolution Codes | 18-19 |

| S |
| Schedule, Semester | 13 |
| Scripts, adding local | 23-24 |
| Service | 5-9 |
| Shifts | 13, 15 |
| Shift Trades & Replacements | 14 |
| Staffing | 13 |
| Statistical Reports | 28-29 |
| Successful Reference Communication Strategies | 34-35 |
| Supplemental Materials | 9-10 |

| T |
| 24/7 Cooperative | 14, 30-31 |
| Technical Problems, Reporting | 19, 23 |
| Testing | 11, 12, 21, 24 |
| Training Group | 11, 22 |
| Transcripts | 6-7, 10 |
| Transfer Call | 15 |
| Troubleshooting Guide | 23 |

| U |
| URL | 22 |

| V |
| Virtual Reference Best Practices | 30, 33-34 |
| Checklist | 33-35 |
| 24/7 | 30 |
| Qwidget | 36 |

| W |
| Web Site | 10 |
| Web Site Intranet | 10 |
| WorldCat | 10 |