Ask Us 24/7 Policies and Procedures

Contacting the Ask Us 24/7 Administrator

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Notification and Staffing

Policy #1A: *Arranging coverage when you know in advance that you will miss a shift.*
If you know you are going to miss a shift due to vacation, meetings, or illness, but the library is still open, the shift must be covered by another librarian, or made up later.
- Libraries with more than one staff member participating in Ask Us 24/7 will fill in the virtual reference shift first from their own staff members. If a staff member cannot fill in for the shift, follow the next step.
- Send a request to the Virtual Reference Participants listserv at askus247@googlegroups.com, asking if anyone is willing to cover your shift. You may also contact other virtual reference librarians directly. You are advised to put out a request for a sub well in advance (at least two weeks) in order to have the best chance of finding a sub. If you are unable to find a sub for your shift, follow the steps for missed shifts in policy #1B.

Policy #1B: *Making up a missed shift.*
If your library was open, but you missed a shift due to illness or forgetfulness, or were not able to arrange a substitute for a shift that you knew about in advance, you are required to make up that shift.
- Contact Jaclyn McKewan as possible, to let her know that you missed (or will miss) the shift.
- Select 2 or 3 possible makeup times from the list titled "247 Ref Coop hours that need more coverage" for your queue type.
  - Public: http://wiki.questionpoint.org/PUBLIC%20247Ref%20Coop
  - Academic: http://wiki.questionpoint.org/ACADEMIC%20247Ref%20Coop
- Include your selected times in the e-mail to Jaclyn. If possible, choose times listed in red or yellow.
- Jaclyn will let you know which makeup time works best for both the global cooperative and Ask Us 24/7.

Policy #1C: *Free hours*
Each library is entitled to 5 "free" hours per calendar year, in which they can miss a shift without being required to find a substitute or make it up. If a librarian is unable to makeup a missed shift, his/her site supervisor may request that their library use some of their allotted free hours. This request can only be made by the site supervisor, and can be made by contacting Jaclyn McKewan.

Policy #1D: *Notifying for closings.*
If your library is closed due to inclement weather or holidays, you are not required to find a sub for or make up your virtual reference shift.

In cases of inclement weather, call or send an email to Jaclyn McKewan regarding your library's closing. She will notify the 24/7 Reference Cooperative scheduler that your shift will not be covered. If your library remains open, but you are unable to go to work due to bad weather, notify Jaclyn by phone or email that your shift will not be covered. If she is unable to find a sub, you may be required to make up the shift.

A week or two prior to federal holidays, Jaclyn will e-mail libraries normally scheduled to staff the virtual reference desk on that day, to find out if they will be open. If you know that you will be closed soon for a holiday and have not received an e-mail from Jaclyn asking about it, please e-mail her to let her know.

Policy #1E: *Libraries with one or less MLS on staff*

If a single library that does not have an MLS librarian on staff wishes to participate in Ask Us 24/7 that library may do so and the library's staffing requirement will be waived. It is expected that most libraries without an MLS on staff are small and will not greatly increase traffic to the Ask Us 24/7 queue. Even if a library's staffing requirement is waived, that library is still required to answer follow-up and referral questions for their library's patrons. It is also expected that public library systems joining Ask Us 24/7 will be required to contribute at least 10 hours per week of staffing, even though some of their member libraries may not have an MLS on staff. If a single library has only one MLS on staff and wishes to participate, the Ask Us 24/7 Administrators may waive or reduce that library's staffing requirement on a case by case basis. Please contact the administrators with questions about staffing.

Policy #1F: *Notification of technical problems*

Please notify Jaclyn McKewan immediately if you experience technical problems that prevent you from chatting with patrons. Jaclyn will help you troubleshoot the problems so you can return to the chat and finish your virtual reference shift. If Jaclyn is not available, contact QuestionPoint Support for troubleshooting help through your MyQuestionPoint home page or at (800) 848-5800. If you miss a substantial portion of your shift due to issues caused by user error (incorrect browser settings, for example), you may be asked to make up the shift. PLEASE NOTE: if your library experiences an internet outage or another technical problem that is out of your control, you will not be asked to make up the shift.

Quality of Service

Policy #2A: *Always greet the patron.*
- Use a Welcome script to greet the patron immediately upon entering the chat.
- Remember to use the patron's screen name in your welcome in order to personalize the service and create a friendly atmosphere.
- Check the patron information to find out where the patron came from, if they have entered an email address, and if their browser is compatible for cobrowsing.

Policy #2B: *Conduct a reference interview.*
- Conduct a reference interview as you would at the traditional reference desk by clarifying the patron's request, asking for additional information, etc. Be succinct, but be friendly.
- Use question negotiation to ensure you understand what type of information the patron needs. Use open-ended questions when appropriate.

- Ask the patron if the information is needed for an assignment, and what type of resources they are looking for (peer-reviewed journals; books; web sites; etc.).

Policy #2C: *Keep the patron in the session.*
- Inform the patron of your progress as you search for information. Use scripted messages as necessary, or send the patron a simple message such as "still searching." Don't let more than 60 seconds elapse between your messages to the patron.
- Don't use library jargon or acronyms that might confuse the patron. Keep your language simple and easy to understand.
- Be sure to ask the patron if they have a deadline for getting this information.

Policy #2D: *Provide the information.*
- Provide the answer/information first by sending the URL to the patron. Always ask if they can see the web page. Then you can ask if the patron wants to see how you located the information.
- Use the Policy Pages in QuestionPoint to answer circulation questions. You should also check the local library's scripts for often-used answers to questions. Check the library's policy page for other information about the library, including available databases and other resources.
- Give the patron a chance to determine if the information you sent is useful, and always cite the resource so the patron knows where the information came from.
- Don't automatically tell the patron to call the local library. If the patron does not need the information right away, you may be able to answer the question on your own by choosing Followup by Me, or have the local library respond to the patron by choosing Followup by Patron Library. If the patron needs the information right away, then they should call their local library.
- Always provide phone numbers and contact information for the library that the patron should contact.
- Recognize when a question should be referred to a subject expert or to the local library, and make sure to appropriately code the session so that the question can be referred.
- Always ask the patron if they need any additional information before you end the session.

Policy #2E: *End the session.*
- Ask the patron if the information you found answers his/her question. Use scripts as necessary, but make sure to personalize the service by using the patron's name.
- Ask the patron if he/she has any other questions.
- When ending the session, be sure to use the patron library's closing script(s), thank the patron for using the service, and encourage them to use it again in the future.

Responsibilities for Participating Libraries

Policy #3A: *Notify the administrators and the group of scheduling changes.*
Advance notice is critical to the success of the project. When requesting a substitute, notify the group *at least* 2 weeks prior to your scheduled absence for the best chance of finding substitute. Each virtual librarian is responsible for covering his/her shifts. Work within your institution first, then request coverage through the group using the listserv (askus247@googlegroups.com). See Policy #1 A – 1E for more details.

Policy #3B: Ensure that the library's weekly shift requirement is being met.

Each library has a requirement for the number of shifts per week that must be covered. The site supervisor is responsible for ensuring that this requirement is being met. If a library does not meet their requirement for 2 consecutive weeks, with no effort being made to make up shifts or arrange for substitutes, the site supervisor will be given a warning by the project manager. If the library continues to fall below the requirement for 2 more weeks, their QuestionPoint account will be deactivated.

Policy #3C: *Create and evaluate your library's scripted messages.*
- Evaluate your library's global scripts on a regular basis. If other librarians are answering questions for your students/patrons, please make sure they are provided with accurate information. Also, make sure that your goodbye scripts contain the words "Thank you for using Ask Us 24/7" so that we can brand the service to our patrons.
- Create your own scripted messages that meet your needs when working with patrons. Messages should keep in mind the quality statements listed above.

Policy #3D: *Provide quality service to the 24/7 Reference Cooperative.*
- As part of the 24/7 Reference Cooperative, it is imperative that Ask Us 24/7 be good neighbors by logging in on time or even a few minutes early to accommodate the inconsistencies in clocks and other time keepers.
- For scheduled chat shifts, librarians are required to select both the Ask Us 24/7 queue and the 24/7 Reference queue for their library type (public and academic).

Policy #3E: *Respond to transcripts needing follow-up.*
Answer questions submitted for follow-up in a timely manner, so that questions are answered within 2 working days. Site supervisors should check for questions requiring follow-up each working day. Any questions that need to be referred to another librarian or subject expert should be referred that day

Policy #3F: *Keep your library's Policy Page accurate and up to date.*
Periodically check your library's Policy Page for accuracy and completion. If you need to add information to or change information on your Policy Page, access your QuestionPoint account, and follow the instructions found at:
http://www.questionpoint.org/crs/html/help/en/profile/profile_contents.html

Policy #3G: *Use the Ask Us 24/7 branding.*
To avoid confusion and aid in marketing of the service, participating libraries are required to use the Ask Us 24/7 brand in all marketing, on web sites and in links or logos.

Privileges of Libraries Participating in the Service

Policy #4A: *Link to the service.*
Participating libraries should link directly to the service using the URL provided upon joining the service. Non-participating libraries *may not* link directly to the service, although they may direct patrons to the service through the askus247.org web site.

Policy #4B: *Attend free, ongoing training.*
- Participating libraries receive free, ongoing training.
- Training opportunities will be provided throughout the year, and may also include site visits by the Ask Us 24/7 administrators.

Policy #4C: *Free access to the Ask Us 24/7 Marketing Toolkit.*
Participating libraries are encouraged to promote the service on an ongoing basis, and have access to the Ask Us 24/7 Marketing Toolkit on http://www.askus247.org. The kit contains logo files for use on the web and in print, as well as sample public service announcements and other resources for publicity.

Policy #4D: *Access to free or low-cost promotional items.*
- Participating libraries will be supplied with promotional items when they join the service. Items may include brochures, pencils, bookmarks, posters, signs, or other materials.
- Libraries needing additional promotional items may contact the Ask Us 24/7 administrators to discuss arrangements. Participating Library Councils may purchase promotional items at cost, to distribute to their member libraries, or in some cases, individual libraries can purchase items themselves.