

AJCU Virtual Reference Best Practices Report

The following report was generated based on input received from the coordinators during the 2014 AJCU VR Project Annual Coordinators' Meeting, held on November 4-5, 2014 at Loyola University New Orleans. The coordinators present, both in-person and virtually, discussed effective strategies for virtual reference. This report is a summary of their discussions.

Originally updated and approved (via email) by the AJCU VR Project Coordinators on July 17, 2015 ([see this version](#))

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Level of formality to use with patrons

- Match the patron's tone if it feels appropriate
 - This will depend on the librarian's comfort level
 - This may include the use of emojis to convey tone
 - Keep it conversational

Type of language to use with patrons

- Try to keep the language as clear and simple as possible
- Avoid slang and library jargon

Use open ended questions to gather more information from patrons

- Examples:
 - “Could you please elaborate/tell me more?”
 - “I need some clarification on...”
 - “Can you describe your assignment?”
 - “Where have you looked so far?”
 - “What keywords/search terms have you tried so far?”

Providing detailed information/instructions to patrons

- Break up the information into digestible chunks
 - When providing patrons with step by step instructions, after providing them with a step, you can check in with them by saying “tell me when you are there” or “describe what you see”
- When appropriate, teach the patron how to get the information they need as opposed to doing it for them
- Send direct links (especially permalinks) when appropriate and available and check to make sure they work for the patrons

What to do while researching a question for a patron

- If the research is going to take more than a few moments, check in with the patron periodically and let them know that you are still with them
 - For example: “Thank you for waiting, I’m still working on your question.”

- Narrate the steps you are taking
 - For example: “I’m searching the catalog by title to see if we own that book.”

Assisting patrons from other institutions

- The librarian does not necessarily need to identify to the patron that they are from another Institution
 - However, if necessary you can disclose you are from another institution
 - For example: when dealing with local policy/building questions when information is not readily available on website/profile
 - Sample message: “Hi, thank you for reaching out. I’m actually a librarian from another institution that covers your school’s chat when the librarians are unavailable. Let me see if I can help you with this. If not, I’ll be sure to refer you to someone who can!”

● Tagging a chat for follow-up/referrals

- When tagging a chat for follow-up by the local library, it is necessary to ask the patron for contact information before ending the chat. This is the only way the local institution will be able to get in contact with the patron.
- Be sure to inform the patron that this option is voluntary; if the patron would prefer not to disclose their contact information, provide for them direct contact information (phone or email) for their local library’s reference desk or appropriate reference staff
 - Sample message: “Would you like me to refer this chat to your campus library? If so, what is your name and the best email address (your school email is preferred) for them to contact you?”
 - Asking for a school email address can be a useful way to identify if the patron is affiliated with an institution
- Use the “tag chat” feature in LibraryH3lp’s chat platform

- Use the “tag chat” feature (button) to ensure that the transcript goes to the correct email for follow up with the patron
- The “tag chat” feature allows you to add a note to the librarian(s) at the other institution. Do not assume the pronouns of the patron. Use gender neutral language like patron, student, etc. instead of pronouns.
- Possible exception: when it is clear a subject specialist librarian will be best able to assist the patron with their research
 - But even in this scenario, it is better practice to give the patron the subject specialist’s contact information, and then tag the chat for follow-up using the built-in platform feature, rather than manually send the transcript to the subject specialist librarian yourself, since the tag for follow-up email address is guaranteed to be monitored by the local library staff
- Please refrain from making judgmental comments about the collections, websites, or organization of another institution

Things to consider when assisting patrons with lengthy/in-depth questions

- Who is the best librarian to assist this patron? Would a subject specialist be able to better answer their question?
- What are the patron’s time constraints?
- Point out that they can e-mail themselves a copy of the transcript for future reference
- Note the support that the patron needs around research and technology
 - Patrons may need support with technology, searching or both
 - Determine the technology and research needs of the patron and adjust your chat to meet them where they are
- You can set your status to busy rather than accept any new chats
 - Once a chat is initiated, it is fine to ask the patron to hang on while you work on the request, or wait while you address a competing request, but it isn’t right to accept the chat (and keep another librarian from answering) and then ask the

patron to wait for you

Transferring patrons

- Treat transitions in the virtual environment as we would in-person
- If you are near the end of your shift and the chat interaction seems like it will continue past that time, let the patron know that you may need to transfer them. Give options: [tag for chat follow-up](#) or [transfer to next on duty](#) with explanation
 - If your consortia shift is over and you need to end a chat, [privately message the next librarian covering the queue](#) and ask if they will accept a transfer. Once you have confirmation they can take the chat, alert the user that you are transferring them to another librarian.
 - Sample message: “My shift is ending soon and I want to make sure you get the help you need. Can I transfer you to another librarian?”
 - If your consortia shift is ending and you are the only librarian monitoring the AJCU queue but you get a chat you do not have time to answer, you will need to [transfer the chat](#) to the ChatStaff queue. If the chat appears on your screen but you don’t answer it and you log out, the chat will remain unanswered and will not be seen by a ChatStaff Librarian.

Ending a chat

- When ending a chat, give the patron an opportunity to ask further questions
 - This can be done by asking questions like:
 - “Does this answer your question?”
 - “Is there anything else I can help you with?”
- Other positive ways to end a chat:
 - Thank the patron for using the service

- Invite them to come back if they have further questions
- Wish them a good day/night
- If the patron has been inactive, let them know they can continue the chat
 - Sample message: “Are you still there? I haven't heard from you in a bit so I'm going to close this chat, but if you have any further questions please do come back and I or another librarian will be happy to help!”
 - Sample message: “I've noticed that you haven't responded in a while. I hope that I was able to properly answer your question, but feel free to reach out if you have any other questions. Have a good day!”

Tips for challenging interactions

- Acknowledge
 - “I see that the article you need is not available within your timeframe.”
 - “I know that wasn't the answer you were hoping for.”
- Offer other solutions
 - “Would you like to find a similar resource on the same topic?”
 - “Would you like me to refer this chat to your home campus so they can follow up on your interlibrary loan question?”
- Change the medium of communication if you are comfortable doing so
 - This option can help when there is a misunderstanding, but is not recommended for abusive patrons
 - “I think I can better assist you by sharing my screen. Are you available for a Zoom call?”
- If the user is verbally abusive, end the chat, [use the block feature](#) and follow up with the respective library

- If you encounter questionable or inappropriate behavior, you should send a warning message and then terminate the chat question. For example:
 - “Can I help you with a research/library-related question?” (if the patron’s opening greeting is ambiguous as to their purpose for engaging the chat service)
 - “This is not an appropriate use of our service. Unfortunately, I will need to end this session.”

Other tips and thoughts

- You can [set up canned messages](#) to help with answering chats more quickly. These can be used as standardized greetings, closings, and other repeated interactions (ex. transferring, tagging for follow-up, etc.).
- You can [send/receive images or screenshare when appropriate](#).
 - Image tools: [Snipping Tool \(Windows\)](#), [TechSmith Capture](#), [Screenshot on Mac](#)
 - Screen share applications/programs:
 - [Join Me](#)
 - [Adobe Connect](#)
 - [Zoom](#)
- Sometimes people just want the article
 - If you find things quickly, you should still share the steps involved when possible and walk them through how to locate it on their own
 - You can [send file attachments](#) directly through LibraryH3lp, but a URL or permalink are best for authentication purposes. Please be sure you are only sending files to registered .edu addresses for the institution for which you are answering
- Help users to learn to plan for the next time when they need a subject specialist

- Be encouraging/supportive with words like “great” or “good choice” or “those are good search terms”
- Check on what assignment materials (aka LibGuides) are readily available at the patron’s institution already

Additional resources for virtual reference

- [Guidelines for Behavioral Performance of Reference and Information Service Providers\(RUSA\)](#)
- [Guidelines for Implementing and Maintaining Virtual Reference Services \(RUSA\)](#)
- [“Virtual Reference Training: The Second Generation” by Lynn Westbrook \(C&RL, May 2006\)](#)