



**BC ELN Province-Wide
Post-Secondary Virtual Reference Project
Service Guidelines for Service Providers
v.4**

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Service Guidelines

Who do we serve?

The service is intended for all students, faculty and staff at all publicly-funded, post-secondary institutions in BC, as well as the general public.

Patrons will access the service from access points on each participating institution's website and from AskAway.org.

No authentication is required to ask a question; authentication is only required to get into licensed databases.

What kinds of questions do we answer?

We are open to all questions, and will provide help with course-related research tasks e.g. finding books, journals, articles, etc..

How do we answer questions?

Levels of service will depend on the user's computer configuration; the ideal will be to provide chat/IM service, with co-browsing/page pushing option.

The service will combine chat and email reference; when the chat service is closed a form will route email questions to the appropriate institution.

Hours of Service

At present, AskAway provides 67 hours of service per week. Actual hours of service are:

10am-9pm Sunday-Thursday
11am-5pm Friday-Saturday

AskAway closes for the Christmas break and for intersession in April and August. For actual dates, please see the AskAway Portal:
<http://www.askaway.org/staff>

Policies

AskAway Competencies

- Staff should have completed or be currently enrolled in a formal LIS program (MLS, Library Technician diploma), or have demonstrated relevant experience and skills.
- Staff must possess core virtual reference competencies, including:
 - Ability to carry out a reference transaction online
 - Excellent communication skills
 - Ability to effectively multi-task, and to effectively assist multiple users simultaneously
 - Broad-based knowledge of library resources and materials
 - Ability to select and demonstrate searching of search engines and subject directories
 - Ability to select and demonstrate searching of library catalogues and databases
 - Ability to explain and apply library policies
 - Customer service orientation
 - Ability to work independently and with a diverse and widely-dispersed team in a virtual context
 - Awareness of the range of services and resources available throughout the province
 - Ability to judge when a referral is needed and to make appropriate referrals
 - Comfort with technology and basic troubleshooting abilities
 - Commitment to ongoing skills development

Patron Privacy

Patron privacy is paramount as transcripts are stored on servers located in the US. We cannot ask for any personally identifiable information from the patron, including email address, name, phone number, IM handle, etc..

You are free to share your contact information with the patron in order to provide the best reference service possible.

When the patron logs out of the service, s/he will be prompted to enter their email address so that a transcript can be mailed to them; their email address is not captured at this point and is not subject to the same privacy restrictions as the chat transcript.

Librarian privacy and screen names

Each person staffing AskAway needs to be uniquely identified; as in the real world, this assists other librarians in identifying who they are working with in QuestionPoint, and who they are transferring calls and instant messaging to. A unique identifier is also essential for collecting AskAway statistics.

The default screen name for AskAway staff is FirstNameLastInitial@AskAway screen name, e.g. SunniN@AskAway.

While using your real name is preferable, if you are not comfortable with this for reasons of privacy, you may choose a different screen name.

Initial contact

Response to users will be on a first-come, first-served basis.

Calls should be answered as quickly as possible.

All queries should be given a response, whether or not the question may be answered.

Instruction

Where practical, aim to provide opportunities to the user to improve their own search strategies. Show them what you are doing and explain why you are doing it. Don't do the research for them.

Working with members of the public

As no authentication is required to access the service, from time to time you may be serving members of the general public. Please apply the same policy on AskAway as you would serving a member of the general public at your own

library's reference desk. If appropriate, refer the patron to their local public library, or to a professional research service.

Inappropriate behaviour

Expect the same behaviour from virtual reference users as from users in the library. You have the right to refuse service if user behaviour is inappropriate.

User disputes

Please refer any disputes with patrons to the AskAway coordinator.

Accessing Licensed Electronic Resources

In order to respect licensing agreements, please only use the resources of the patron's library to answer questions.

Each participating institution has provided a guest login for AskAway service providers to use when helping patrons with resources at the patron's institution.

In-depth Questions & Referrals

If a question cannot be answered within a reasonable amount of time online, or if the patron doesn't want to wait, remember that we cannot ask the patron for any personal information such as phone number, email address, etc. in order to follow-up. Instead:

Give the patron referral information for an appropriate service, such as:

- the specific subject specialist or liaison librarian at their local post-secondary library if it is an advanced reference question that requires the use of subject specific databases or print resources.
- the email reference service at their local post-secondary library if it is a question that requires local knowledge and/or resources.
- When referring a patron to their local post-secondary library, it is preferable to provide both the contact information for the specific subject specialist or liaison librarian and the general email reference service, as individuals may be on holiday, ill, etc..
- the BC public library VR service or their local public library branch's email reference service where appropriate
- a non-BC VR service where appropriate

At your discretion, you may provide your email or phone number to the patron and encourage them to contact you for follow-up.

Procedures

Transferring Patrons at Shift change

When you are starting your shift:

Log in to QuestionPoint a few minutes before your shift begins to give yourself time to do the following:

1. Check to see which librarians are handling calls. The number of calls they are handling will appear in the Active column beside their name.
2. Use Campfire to let the other librarians know you are starting your shift, and to ask if they want to transfer any calls they are currently handling to you.

When you are ending your shift:

1. It is up to you whether you feel able to finish the calls you are currently handling before logging off, or whether you transfer those calls to a librarian coming on shift.
2. Unless it's impossible, please wait until at least one of the librarians coming on-shift has shown up in the Chat Monitor before you log off - if no librarians are monitoring the service, the patron will see the closed message.
3. If no replacement librarians arrive in the queue before the end of your shift, contact your local AskAway administrator or the VR coordinators.

Breaks During Long Shifts

This policy is intended to provide guidance on taking breaks during long AskAway shifts. This policy does **not** override local practice around breaks at your institution, whether that practice is based on rules in a union agreement or on written/unwritten policy. If your institution has its own rules on breaks during long reference shifts, please apply your own rules, but conforming as much as possible to the principles expressed below, e.g. arrange for a backup to cover you, inform your colleagues, etc.

In most cases, quickly running to the bathroom during your shift is fine.

If you are working a long shift and need to take a 15 minute break:

If possible, arrange for another AskAway staff person at your institution to cover your break.

If this is not possible, communicate with the other librarians on your shift to arrange taking a break. Use your own judgement to decide when it would be best to go, taking into account the number of calls coming in, and whether there is another librarian available to take the next call. If it seems like taking a break at that particular time would negatively impact the service level, please postpone your break until another time.

End of Day

If you are working the last shift of the day, please Log Out from the chat monitor promptly at closing time, as the service will stay open until the last librarian logs out. When there are no librarians logged on, patrons will automatically see a notice on the question form page that lets them know the service is closed.

If a patron asks a question within 15 minutes of the time when the service will close for the day, and you feel it cannot be answered in the time available, you may ask the patron to come back the next day or refer the patron to their library.

If you are still helping a patron at the time of service closure, you have the option to deselect all the queues of the chat monitor, but then finish up your chat session with your current patron. Refer to the Detailed Software Handout on the AskAway Staff Portal for instructions. Remember that the service stays open until the last librarian logs off, so it is imperative that you log out of the queue at closing time.

Sickness/Unexpected Absence

If you are unable to work a scheduled AskAway shift, please work with your local AskAway administrator to find a replacement AskAway staff person at your institution.

If a replacement is unavailable locally, you may offer the shift up for trade on the eln-vrefservprov listserv.

If you are unable to find a replacement and it is within 24 hours of the shift's scheduled start time, please contact the VR Coordinator or the ELN Office; contact details are on the AskAway Portal: <http://www.eln.bc.ca/askaway>.

Working From Home

AskAway has no policy on working from home. Please follow your local institutional policy. However, librarians working from home are expected to have a high-speed internet connection and a computer which meets the system requirements for chat.