



## Ask a Librarian: Policies and Procedures

### Policy: Staffing Ask a Librarian

- At the assigned time, you should be logged in and “available” on the scheduled desk.-
- You may log in to your local library’s desk in addition to the collaborative or academic desk you’re scheduled to cover in order to view emails. However, live chat questions through the collaborative or academic desks are the priority during this time.
- If you will be unable to cover an upcoming scheduled shift, contact your Site Coordinator and attempt to fill the schedule within your library. If it can not be filled internally, send an email to the AskRef listserv ([askref@lists.tbhc.org](mailto:askref@lists.tbhc.org)) to find a replacement. If you find out last-minute that you will not be covering a shift, cannot secure coverage, or if you find yourself alone or with insufficient help on the desk, email the Ask a Librarian Helpdesk immediately at [askalibrarian@tbhc.org](mailto:askalibrarian@tbhc.org).
- Refer to the AskRef listserv emails for important information regarding schedules, software updates, and more.

### Policy: Accepting Users

- Send a “Greetings” script to the user soon after acceptance.
- While staffing Ask a Librarian, you may help more than one user at a time. Handling multiple users should especially be considered in the following situations:
  1. If there is only one librarian staffing.
  2. If the current user’s query is simple and easy to answer and other users are waiting in the queue.
  3. If a user has been waiting in the queue for longer than five minutes.

### Helpful Tips for Accepting Users

- Set Availability status to “available” when ready to take chat users.
- Once in the Console, make an effort to find out about the other librarians on duty by viewing the agent info in the bottom right corner.
- Before accepting users from the queue, preview their information and question by right-clicking on user line in the queue.

- During your shift, communicate with other librarians also staffing Ask a Librarian. If possible, set up a system in advance for accepting users with your fellow librarians for that shift.

### **Policy: Inappropriate Use of Ask a Librarian**

If you feel that a user is using Ask a Librarian inappropriately – either the original question crosses the line of acceptable or follow-up questions become personal/invasive or otherwise inappropriate – please do one of the following.

- If you believe the question and underlying user behavior are legitimate but the chat is not going well, use private IM or the Agent Room to ask another librarian staffing Ask a Librarian if you may transfer the user to him/her. Briefly inform him/her of the situation so that he/she is prepared when entering the chat.
- If the patron is overtly disrespectful or vulgar, end the session immediately.
- When you are not certain that the inappropriateness is intentional, a warning script from the “Inappropriate” category helps to ensure that the problem is not due to miscommunication.
- If you choose to end the session, send a script from the “Inappropriate” category to the user. Modify the script as needed to suit the situation.
- When closing a session, choose the “Inappropriate” category status.
- After closing an inappropriate session, use the Agent Room to briefly inform your coworkers, citing the username and IP address. Email [askalibrarian@tblc.org](mailto:askalibrarian@tblc.org) to report the session.
- Notify Ask a Librarian staff immediately if a user threatens physical harm of any kind, including self-inflicted harm.

### **Policy: Accepting Users at Closing**

- If you are still working with a user at the end of your shift:
  1. At your discretion, continue to help the user if you determine that the transaction can be ended quickly.
  2. If you cannot complete the transaction and Ask a Librarian is still open, transfer the user to another librarian.
  3. If the question requires more in-depth research and you would like to complete the transaction with the user, obtain user’s email address and continue the transaction via email.
- If you have not completed a transaction when Ask a Librarian is closing:
  1. Explain to the user as the session progresses that Ask a Librarian will be closing.-

2. Explain the hours of service to the user. Ask if they would like to log in again tomorrow or offer to forward the chat to the user's local library for follow-up.
3. If the question requires more in-depth research and you would like to complete the transaction with the user, obtain user's email address and continue the transaction via email.
4. To close the queue, mark yourself "unavailable" if you are still with a user past closing time for any reason.

### **Policy: Non-Responsive User**

While staff should attempt to maintain communication with the user and not end a chat prematurely, there are some cases where users stop communicating without notice. When this happens:

- Send the "Are you still there?" script from the "Goodbyes" category to attempt to communicate with the user.
- Monitor the animated typing keyboard icon that shows when the user is actively typing.
- Give the user several minutes to respond to you, and then send the "Unresponsive – Warning" script from the "Goodbyes" category to let the user know you will be ending the session shortly.
- If the user still doesn't respond, send the "Unresponsive – End Session" script and end the session. Choose the appropriate closing status.

### **User Services**

- Services provided by Ask a Librarian are available to all Florida residents.
- The use of proprietary, or subscription-based, resources should be limited to what your user could legally access. Florida Electronic Library resources are bookmarked and available to all Florida residents.
- To access the user's personal library account, you should guide him or her through the process of logging in, by using screen sharing or text-based instructions. If a patron cannot log in with his/her personal login information, you are encouraged to use the "sample login information" provided by his/her home library in the knowledge base to access his/her proprietary databases, or use the Florida Electronic Library resources. You should not attempt to log in yourself using the patron's personal login information.
- If the user does not know his/her library card number or PIN, or cannot log in for some other reason, offer to forward the chat to the user's library, provide contact information to the user for his/her library, or follow instructions provided by his/her library in the knowledge base.

- If a non-Florida resident enters the service, assist the user with simple web-based or related searches, but refer user to his/her local library (and offer contact info) for more in-depth or local needs.
- For non-resident distance learners, assist the user with the school's resources or open-web sources.

## **Privacy**

- Ask a Librarian is committed to keeping personal information private. In order to provide effective assistance, we do ask for name and e-mail address; however, users do not have to provide this information to receive services.
- Additional information, such as status – middle school student, college student, etc. – and library of access may be gathered to more efficiently analyze questions, direct our responses, or recommend appropriate reference or research resources. Personal information gathered before and during a session is considered confidential and will only be used to respond to a question and obtain statistical data.
- The majority of Ask a Librarian session transcripts will be held on our servers for a maximum of 45 days, at which point they will be deleted. A sampling of transcripts, with all personal identifiable information removed, will be kept for research purposes. These transcripts provide statistical information and quality control that assists us in serving our users more effectively.
- This policy is posted for users at: <http://info.askalibrarian.org/privacy.asp>