

Chat Reference Policies & Procedures

Overview

Chat (sometimes still referred to as virtual reference/VR) service is one of the most popular reference services offered by the University of Illinois Library. It is used by all patron types, and fields questions of all types, subjects, and levels of difficulty. The expectations for quality are the same as for all our reference services.

Many patrons use chat reference as their only means of communication with the library. It is critical to provide a high level of user satisfaction and a positive user experience when providing service through this medium. Since so many units and libraries across campus participate in our Reference Hub, it is important to maintain a high quality and consistent experience for our patrons.

Chat provides an excellent opportunity to collaborate with your colleagues. If you are on the desk with another person, share your questions with your shift partner(s) as you are answering it, and incorporate each other's suggestions into your reference transactions. To facilitate communication across all units and libraries who contribute to chat, we also have a **Reference Team on MS Teams** to which you have been added. Please keep this open while you're logged into chat and check it at the beginning of each shift since it is an excellent way to consult with your colleagues, get help answering a question, or see what updates have happened since your last shift. We also encourage you to ask questions and consult with others logged into chat via the group chat function in LibChat.

Finally, **chat reference is not a quick answer service**—we help patrons formulate and conduct effective and efficient research strategies, but we do not do research for patrons or send links to articles without explaining how you got the article. You will almost always need to incorporate instruction into your online reference interviews.

Scope

The service is intended for U of I students, faculty, staff, and related affiliates. We will answer questions from the public, as long as they are related to specific U of I Library collections, history, services, or government information. It is courteous and reflects well on the library if you can help an unaffiliated patron to find a better place to start like a local library, an association or government website, or even help formulate a good internet search.

Chat reference should answer the same types of questions that we are asked in person and through other mediums. Patrons with longer (>20 minutes) questions should be given some instruction on where to get started (for example, shown how

to use the catalog or an appropriate database), and then, depending on specific unit policies and patrons waiting for service, *referred* to ask their question in person or via email depending on what is more appropriate for the question and the patron's location.

Chat questions often require subject or domain specific expertise to answer. It is a service expectation that *referrals* are regularly made as part of a reference transaction.

Referrals

Read and become familiar with the [referral policy](#) linked from the your GA manual.

Referrals should be done in concert with your own efforts to answer a research question. The chat software provides options for making referrals to subject specialists or librarians/GAs in a specific library who may be logged in at the same time as you are. Be sure and check the list of staff online each shift (identified by their unit next to their name in LibChat) and familiarize yourself with who is available to assist. Try to message or call ahead before initiating a chat transfer, to be sure the other staff person is on their computer and ready to pick up.

Additionally, referrals may also be used to set up an off-chat consultation with a subject or functional specialist, so do include contact information (name, email, and area of specialty) regularly as part of chat conversations. There is a canned message in LibChat for specialist referrals.

Confidentiality

Chat transcripts are logged into the LibChat software with patron names anonymized. Never disseminate a patron's question except for referral to another library unit.

The transcripts will be monitored for training and evaluation purposes, statistics, and development of our FAQ, by the Reference Management Team and GA supervisors. We encourage reading through chat transcripts as a training tool, so be aware that everyone with a LibChat account can read all transcripts.

Priority of service

When staffing *Ask a Librarian* from a public service point (e.g. your unit's in-person reference desk), questions should be taken in the order they are received, regardless of format/communications medium. Be sure to acknowledge each patron, letting them know that you are helping someone else and will be then with as soon as you can.

With this in mind, it is often possible to assist an in-person patron who has a short question at the same time as you have a chat patron on the line (or vice versa). This

does require some juggling and you will become more adept with it over time. Use your professional judgment about what you can handle.

Reference Interview

Complete reference interviews (following the [RUSA Guidelines](#)) should be conducted in chat reference, with a particular emphasis on clarifying the question prior to searching. Chat transactions typically take longer than in-person transactions, so it is important to correctly identify a patron's *full* information need before beginning a search.

A complete reference interview includes the following elements:

1. Greeting the patron

Example Patron: I am having trouble finding articles on marine mammal habitats.

Possible greetings:

- Use one of the two canned greetings provided in the canned messages button in LibChat.
- I'm helping another patron right now but will be with you in a few minutes.

2. Using open and closed questions to determine a patron's information need

Possible questions:

- Are you having trouble with your search?
- What sorts of information about marine mammals are you interested in?
- What class or assignment is this for? Or are you doing your own personal research?
- Can you tell me a little bit about what you've done so far or where you've searched, or how you'd like to start?

3. Discussing a search strategy providing step-by-step instruction in best practices for research

Possible strategies:

- We can try searching some of our biology databases through the Funk ACES Library website or from the Databases by Subject & A-Z list.
- What kind of marine mammal are you interested in? It helps to be more specific when you're searching ☺
- Let's try "narwhal" in the first search box and "habitat" in the second.

4. Evaluating search results with a patron, to make sure their question is completely answered

Possible approaches:

- Let's look through the first ten results. Which ones look appropriate to you?
 - We can click on the title of some of the results to see a short abstract, which will tell us more about what's in the article.
 - Which articles look the most appropriate or relevant for your assignment? We can refine our search by using some of the keywords from the titles or abstracts.
5. Following-up with a patron, including checking back if they need time to review search results, and making appropriate referrals to subject and functional specialists.

Possible follow-ups:

- Did we find enough information for you to continue your search?
- While you're looking, we have a biology subject specialist librarian who can provide some additional suggestions after we're done. Here is her contact information: email@illinois.edu, 217-555-1234.
- We offer consultations by appointment if you want to talk about your research in more depth with an expert once we're done.

Other Communication Guidelines

- *Keep in touch.* Keep users informed by constantly informing them of what you are doing.
- *Break messages up.* Try not to send a giant wall of text.
- *Offer reassurance.* Many patrons have apprehensions about research or are frustrated with their inability to find results prior to contacting a librarian. Reassure them that they made the right choice contacting you, and you will help them be successful.
- *Use inclusive language.* Emphasize how "we" will conduct a search together, rather than providing a list of commands for "you" to follow.
- *Communicate time expectations.* Provide a reasonable estimate on how long a search might take. If you are going to need to do some searching on your own to start, or need to leave the chat, provide a realistic estimate on how long you will be gone (e.g. don't say "back in a minute" unless you really will be back in 60 seconds).
- *Mirror patrons' formality/informality.* Our chat service receives questions from a variety of patron types; look for textual clues that indicate how formal a response a patron is looking to receive.

Instruction

Provide instruction to patrons appropriate to their level of knowledge of the library system and research in general. Key areas to look for teachable moments are:

- *Topic Formulation*
 - Has the patron defined their question sufficiently to perform a successful search?
 - Has the patron chosen appropriate keywords for their topic?
- *Search Strategy*
 - Does the patron know which databases or sources are appropriate for their topic, and where to find them?
 - Does the patron know how to correctly enter a search into a database?
 - Does the patron know how to use relevant features of a search tool?
- *Interpreting Results*
 - Does the patron understand the appropriate criteria for evaluating search results?
 - Does the patron know how to locate full text of results they have found?

Further Reading

Dempsey, P.R. (2016). [“Are you a computer?”: Opening exchanges in virtual reference shape the potential for teaching](#). *College and Research Libraries*, 77(4), 455-468. doi: 10.5860/crl.77.4.455.

Hunter, J., Kannegiser, S., Kiebler, J. & Meky, D. (2019). [Chat reference: Evaluating customer service and IL instruction](#). *Reference Services Review*, 47(2), 134–150. <https://doi.org/10.1108/RSR-02-2019-0006>

Oakleaf, M. & VanScoy, A. (2010). [Instructional strategies for digital reference: Methods to facilitate student learning](#). *Reference and User Services Quarterly*, 49(4), 380-390.

Radford, Marie et al. (2011) [On Virtual Face-Work: An Ethnography of Communication Approach to a Live Chat Reference Interaction](#) *The Library Quarterly*, 81(4) 431-453.