

CREATING POLICIES AND PROCEDURES

One of your challenges in implementing a chat reference service will be the creation of guidelines—all of the policies and procedures that provide the structure for the new service. Chat reference differs from in-person reference service and even from e-mail reference. The policies and procedures that your library created for these other modes of reference do not necessarily apply to a chat reference environment.

Here are some of the questions that your policies and procedures may need to address.

Scope of service

Who may use this chat reference service? If a library card or student ID is required, how will you authenticate the user? Do you need a disclaimer about medical or legal questions? How will you handle frequently asked questions? Homework assignments? Genealogy questions?



Staffing

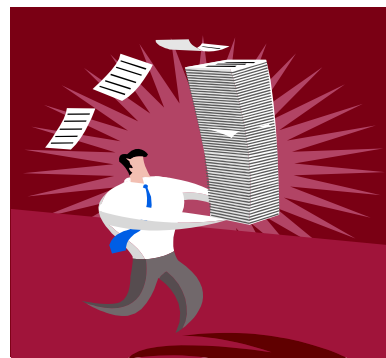
Will librarians be the only ones answering questions? What about trained paraprofessionals or students? Should real names be used by the staff? Where will the staff providing the service be located? If librarians are also working at a public reference desk, how will you handle serving both in-person and virtual patrons? Will librarians be able to work from home?

Referral of questions and follow-up

How will questions be referred to another librarian or to a subject expert? What about telephone call-back or e-mail follow-up? Patrons with undeliverable e-mail addresses? How will you handle specific questions about circulation issues or ILL?

Databases and document delivery

Are there any licensing or copyright issues connected with the library's proprietary databases? Authentication issues? How will you deliver print materials to the patron? Will a scanner or fax machine be available?



Administration

Who will administer the service? What is that person's role? Does this person supervise the staff providing the service? Who has access to the transcripts? Who reviews the transcripts? Do you want peer review? What mechanisms will you set up for staff to share experiences, and to clarify and refine your policies and procedures?



Confidentiality

Will any identifying information be connected to the transcripts? If using transcripts for evaluation and training purposes, how will you ensure the privacy of the users? How will you communicate your privacy policy to users?

Patron conduct

How will you handle harassment, inappropriate language, rudeness, misuse of the service, etc.? Will you deny service to anyone who violates your rules of conduct? Will you establish any limits on the number of questions? Time limits?

SOME RESOURCES TO HELP:

Here are sites that provide good examples of the types of policies and procedures you may need.



[MyWebLibrarian](#)

[QuestionPoint User Guidelines](#)

[Q and A NJ](#)