This guide describes how to follow up on new QuestionPoint questions received and chat sessions with patrons. You can respond to the patron and/or refer the follow-up to another library or a subject-matter expert.

Contents of this guide

Overview ................................................................................................................................................................................ 2
 Select a resolution code at the end of each chat session ................................................................................................... 2
 Follow up a chat session in QuestionPoint or refer the followup to others ................................................................. 2
 Log on to QuestionPoint ...................................................................................................................................................... 3
 Go to questions (including chat sessions) that need followup .......................................................................................... 3
 List of questions for you to follow up (My New Questions) ........................................................................................... 3
 List of questions for your library to follow up (New Questions) ......................................................................................... 4
 List of questions for libraries in your group to follow up (Shared Followup Questions) .................................................... 5
 Respond to the patron .......................................................................................................................................................... 7
 Or, refer followup to another library or a subject-matter expert ..................................................................................... 10
 Referral steps ..................................................................................................................................................................... 10
 Referral options .................................................................................................................................................................. 10
 You cannot access an in-progress chat session in question lists ................................................................................. 11
 Troubleshooting ................................................................................................................................................................. 11
 More information ............................................................................................................................................................... 11
 Support ................................................................................................................................................................................ 11
 Comments, suggestions, feedback ................................................................................................................................... 11

Chat followup and referral
Overview

Select a resolution code at the end of each chat session

1. When a chat session ends, the librarian selects one of the following resolution codes in the chat monitor:
   - Answered
   - Followup by me
   - Followup by patron’s library
   - Lost Call
   - Practice

   The 24/7 Reference Cooperative’s best practices document contains guidelines for use of the Resolution codes by members of the Cooperative. Libraries and groups should provide guidelines for use of the codes by their librarians when they are not participating in the Cooperative.

2. QuestionPoint sends the session transcript to the patron’s e-mail address (if provided by patron).

3. QuestionPoint creates a question (reference transaction) for the session and places it in the QuestionPoint system, including the chat transcript and other information about the session.

   **Note:** A question can be added in QuestionPoint through a chat session, web form, telephone call, reference-desk visit, etc. Any expression of a patron’s information need can be managed in QuestionPoint as a question.

4. Based on the resolution code selected, QuestionPoint assigns a status to the question and adds it to a question list:

<table>
<thead>
<tr>
<th>Resolution code</th>
<th>Question status</th>
<th>Question list*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answered</td>
<td>📚 Answered</td>
<td>Answered Questions</td>
</tr>
<tr>
<td>Followup by me</td>
<td>? New for the chatting librarian’s library</td>
<td>New Questions</td>
</tr>
<tr>
<td></td>
<td>and for the chatting librarian</td>
<td>My New Questions</td>
</tr>
<tr>
<td>Followup by patron’s library</td>
<td>? New for the patron’s home library</td>
<td>New Questions</td>
</tr>
<tr>
<td>Lost Call</td>
<td>☐ Closed</td>
<td>Closed Questions</td>
</tr>
<tr>
<td>Practice</td>
<td>📚 Answered</td>
<td>Answered Questions</td>
</tr>
</tbody>
</table>

* Questions with New, Answered, or Pending status are also listed in the Active Questions list. Questions with New, Answered, Pending, or Closed status are also listed in the All Questions list.

Questions with ? Pending status are awaiting response by another library, a subject-matter expert, or a patron. Questions with ☐ Closed status are considered to be complete; they are listed in the Closed Questions list only.

Follow up a chat session in QuestionPoint or refer the follow-up to others

1. The librarian logs on to QuestionPoint.

2. The librarian goes to one of the lists of questions that need follow-up:
   (Your library or group should provide guidance on which question list you will go to.)
   - List of questions for you to follow up (My New Questions)
   - List of questions for your library to follow up (New Questions)
   - List of questions for libraries in your group to follow up (Shared Followup Questions)

3. The librarian selects a question in the list to follow up.

4. From the Full Question page for the selected question, the librarian:
   - Sends a message to the patron, or
   - Refers the question to another library or a subject-matter expert for follow-up.
Log on to QuestionPoint
Log on to QuestionPoint:
1  Go to http://www.questionpoint.org/
2  Click Librarian Logon (at top of page). The QuestionPoint Logon page appears.
   Tip: Bookmark the Logon page as a shortcut for steps 1–2.
3  Type your QuestionPoint authorization (User ID).
4  Type your QuestionPoint password.
   Tip: Case sensitive; be sure that Caps Lock is off.
5  Click the Logon button. The My QuestionPoint page appears.

Go to questions (including chat sessions) that need followup
Your library or group should provide guidance on which question list you will use to select questions for follow-up:
• List of questions for you to follow up (My New Questions),
• List of questions for your library to follow up (New Questions), or
• List of questions for libraries in your group to follow up (Shared Followup Questions).

List of questions for you to follow up (My New Questions)
To go to the list of questions for you to follow up (questions assigned to you):

1  Click the New link under My Questions on the My QuestionPoint page.

My QuestionPoint
Welcome, Elmstree Admin
Institution: Elmstree Public

QuestionPoint displays the My New Questions list. It is located under the My Questions tab in the Ask a Librarian module.
Questions in this list need follow-up. They have the New status icon: ?
2  Click a question in the list.

QuestionPoint displays the Full Question page.
See "Respond to the patron" on page 7 for the next steps.
List of questions for your library to follow up (New Questions)

To go to the list of questions for librarians at your library to follow up:

1. Click the **New** link under **Question Lists** on the My QuestionPoint page.

   QuestionPoint displays the **New Questions** list. It is located under the Questions tab in the Ask a Librarian module.

   Questions in this list need follow-up. They have the New status icon: ?

2. Click a question in the list.

   QuestionPoint displays the Full Question page.

   See “Respond to the patron” on page 7 for the next steps.
To go to the list of questions for librarians in your group to follow up:

1. Click the **Shared Followup** link under **Question Lists** on the My QuestionPoint page.

   **Note:** If there is no link, the group administrator has not turned on shared follow-up.

---

**QuestionPoint displays the **Shared Followup Questions** list. It is located under the Questions tab in the Ask a Librarian module.**

2. Click a question in the list.

---

**QuestionPoint displays the Full Question page for claiming the transcript. The page has two parts.**

The top part contains the question detail and a **Claim** button. The detail contains the patron information from the chat session.
The bottom part contains the question history and a Claim button. The history contains the transcript of the chat session, librarian notes, and system notes about librarian or patron actions.

<table>
<thead>
<tr>
<th>Question History</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patron:</strong></td>
</tr>
<tr>
<td><strong>Librarian 1:</strong></td>
</tr>
<tr>
<td><strong>Patron:</strong></td>
</tr>
<tr>
<td><strong>Librarian 1:</strong></td>
</tr>
<tr>
<td><strong>Patron:</strong></td>
</tr>
<tr>
<td><strong>Librarian 1:</strong></td>
</tr>
<tr>
<td><strong>Patron:</strong></td>
</tr>
<tr>
<td><strong>Librarian 1:</strong></td>
</tr>
<tr>
<td><strong>Librarian 1:</strong></td>
</tr>
</tbody>
</table>

[Practice] Chat Transcript: What is California?

That's a very basic question. Please tell me more about what you need.

My son needs to write a general 500 word report with 2 to 5 pictures about California for his 4th grade class, emphasis on its history.

Ahh, for Mr. LaRue?

That's him!

Did you bring home the study guide?

No!

I'll send it to you shortly by e-mail. OK?

Terrific! Thanks!

Patron ended chat session.

Note: Set Resolution: Followup By Patron's Library

Referred from: Chat Transcript to Shared Followup

Note: Set Description: Homework

Note: LaRue assignment folder

3 Click the Claim button.

QuestionPoint removes the question from the Shared Followup Questions list so no one else can claim it.

QuestionPoint displays the Full Question page for sending a message to the patron.

See "Respond to the patron" on page 7 for the next steps.
Respond to the patron

Send a message to the patron from the Full Question page.

The Full Question page has two parts. The top part contains the question detail with patron information from the chat request form. It also contains various action buttons, lists, and links. The patron field contains the patron’s e-mail address as provided on the chat request form.

Tip: If the patron field does not contain the correct e-mail address, you cannot send a message to the patron. However, if you know the patron's correct e-mail address, you can change the address so you can send a message. Click the Change Patron E-mail button to change the address. When you change the address, QuestionPoint creates a copy of the Full Question, except the new Full Question has the new patron e-mail address, a new Question ID, and a note in the Question History describing the change. The new Full Question has the same status as the old one. You can then send a message to the patron from the new Full Question by clicking the Answer button. When you send the message, the transcript or Question History is included.

The bottom part of the page contains the question history and action buttons. The history contains the transcript of the chat session, librarian notes, and system notes about librarian or patron actions.

1. Click the Answer button (if the patron field contains the correct patron e-mail address.)
QuestionPoint displays the Answer Question page. The page has two parts.

The top part contains the work area with various boxes, buttons, and lists for preparing a message to the patron.

From this page, you can send three types of messages to a patron: answer, clarification request, status report.

**Send an answer** if you believe that you have the information that the patron needs.

**Request clarification** if you need more information from the patron before you can prepare an answer.

**Send a message** if you want to inform the patron about the status of the work on the question.

The bottom part contains all the information from the Full Question page.
2 Click the Full Question View link if you want to view all the information in a separate window while you work.

3 Prepare your message: include text and insert scripts or attach files as needed.

4 Click the Send Answer button to send an answer. The message is sent, the question status changes to answered, and the question is moved to the Answered Questions list.

Or

Click the Request Clarification button to send a clarification request. The message is sent, the question status changes to pending, and the question is moved to the Pending Questions list.

When the patron responds to the clarification request:
- You receive an e-mail notice,
- The response is added to the question,
- The question status changes to new, and
- The question is moved to your library's New Questions list and your My New Questions list for follow-up.

Or

Click the Send Message button to send a message about the status of the work on the question. The message is sent but the question status does not change and the question stays in the same question list.
Referral steps
To refer for follow-up by another library or a subject-matter expert:

1 Select a referral option in the Refer To drop-down list in the Full Question page and click the arrow.

**Note:** The figure below shows all referral options; some options may not be available to your library. Your library or group should provide guidance on which referral options you will use.

**Full Question**<br>**<< 1 of 9 >> | Return to List**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared Followup</td>
<td>Places the question in the Shared Followup Questions list for any library in your subscription group to claim</td>
<td>If your group uses full chat and the group administrator activates shared followup</td>
</tr>
<tr>
<td>E-mail Partner</td>
<td>Sends the request via e-mail to one of your personal subject-matter experts who does not have a QuestionPoint account</td>
<td>Yes, available to every library</td>
</tr>
<tr>
<td>Subject Matter Expert</td>
<td>Sends the request to one of the 24/7 Reference Cooperative’s subject-matter experts.</td>
<td>If your library is a member of the 24/7 Reference Cooperative</td>
</tr>
<tr>
<td>Partner (Subscription)</td>
<td>Sends the request to a library or subject-matter expert in your subscription group.</td>
<td>If activated by administrators</td>
</tr>
<tr>
<td>Partner (Cooperative)</td>
<td>Sends the request to a library or subject-matter expert in your cooperative group.</td>
<td>If activated by administrators</td>
</tr>
</tbody>
</table>
You cannot access an in-progress chat session in question lists

The [In Progress] label in front of a chat transcript in a question list indicates that the chat session is in progress. You cannot access the Full Question containing the transcript. The list entry is not hot linked and it has no check box.

The list entry appears when a patron submits a chat request. The status is "New" until a librarian joins the session. When a librarian joins the session, the status changes to "Answered."

The librarian can change the status when he or she ends the session and selects a resolution code. In this example, the librarian selected "Followup by patron’s library."

When the session ends, the [In Progress] label is removed and you can access the Full Question containing the chat transcript.

Troubleshooting

- Document problems that you encounter so you can describe them when you request support.

More information

More information and documentation is available on the QuestionPoint web site at http://www.questionpoint.org/

Support

- OCLC support staff:
  E-mail: support@oclc.org
  Telephone: 1-800-848-5800 (USA) or +1-614-793-8682 (7:00 a.m. to 9:00 p.m., U.S. Eastern time, Monday–Friday)

Comments, suggestions, feedback

We welcome your comments about this guide. Please use the form at https://www.oclc.org/forms/questionpoint/feedback.en.html and be sure to include the name of this guide, "Question follow-up and referral"