

# REFERENCE SERVICE GUIDELINES

## *GENERAL SERVICE GUIDELINES*

### **Referrals to Outside Resources**

State University of New York Cortland  
Memorial Library  
Cortland, New York

#### **Referrals**

The reference librarian may find it necessary or advisable to refer users to other collections, services, or sources of information within or external to the library.

#### **Referrals to Other Library Faculty**

A referral to another member of the library faculty may be necessary when the librarian on duty does not possess the in-depth expertise or knowledge needed to answer a detailed reference query. When making a referral to another librarian, the librarian on duty should notify the colleague of the referral and outline the sources already checked.

#### **Referrals to Other Libraries, Institutions, Departments, Faculty, or Other Services**

Referrals to outside sources may be made based on the librarian's knowledge of resources, services, or information available from other libraries, institutions, or departments. It is appropriate to confirm in advance the availability of the needed information, service, or material from the institution or individual recommended. Availability of needed materials may be confirmed in various ways, such as searching other online library catalogs. It may also be appropriate for the librarian or user to phone ahead to verify availability of services and materials.

#### **Referrals to Interlibrary Loan**

Referrals to Interlibrary Loan (ILL) should only be made after determining that the requested item(s) are not owned by the library and are not available online. The reference librarian should make sure that the user has a complete bibliographic citation, and should assist the user, if necessary, in properly filling out the Interlibrary Loan Request Form. When a user is in urgent need of an item not owned by the library, fax service, Ariel or alternate document delivery service may be recommended by the Librarian on the ILL form.

University of Texas at Austin  
University of Texas Libraries  
Austin, Texas

#### **Referrals**

Staff members should recognize their own limitations and ask colleagues within the unit for advice and assistance as necessary. They also refer users to others who are better qualified to serve particular needs. Staff members confirm that other units, libraries, or special collections can be of assistance before referring users

## THE ACADEMIC LIBRARY MANAGER'S FORMS, POLICIES, AND PROCEDURES HANDBOOK

to them. Staff members do not recommend specific fee-based information services. They refer users to standard directories. Referrals to other libraries or agencies off campus are made whenever appropriate.

### Reference Appointments

Indiana University–Purdue University Fort Wayne  
Walter E. Helmke Library  
Fort Wayne, Indiana

#### Rationale

There are two types of reference appointments available at Helmke Library, walk-in and scheduled. Both types of appointments are available at the library's reference consulting areas—general reference on the first floor and Science Information Center on the fourth floor. The library maintains statistics on reference appointments and its performance is judged on such indicators, so it is important to make and record appointments accurately. This document outlines the policies and procedures governing the provision of reference and information services on a walk-in and scheduled basis.

#### Policies

The library's basic and in-depth reference and information services and two-tiered instructional services are described in detail on the library's homepage under Reference & Instruction. Any librarian, library staff member, or student worker may respond to a patron's request for information by scheduling a reference appointment with a librarian.

Appointments are recorded by library staff in separate appointment books kept at the Service Desk. The Science Information Center's appointment book will be transferred to the fourth floor during the Center's normal hours of operation (2–4 p.m., Monday–Thursday, during Fall and Spring semesters), and it will be returned to the Service Desk when the Center is closed.

The Science Information Center schedule provides eight (8) hours in addition to the regular general reference schedule's 60 hours, for a total of 68 hours of reference appointments per week. Extra Saturday hours are also added during the peak mid-semester schedule to accommodate demand.

It is important for library staff to convey the message to patrons that a librarian is available to assist them. Patrons who seek assistance on a walk-in basis should be assigned to the next available librarian working in (1) the first-floor general reference area, followed by (2) the fourth-floor Science Information Center, according to the procedures below.

#### Procedures for Recording Walk-in Appointments

When an appointment is for the next available time, and the patron does not ask to meet with a particular librarian, write "walk-in," "student," or "patron" in the appointment book next to the initials of the librarian on duty.

Schedule all walk-in appointments for the general reference consulting area first, then assign patrons to the next available Science Information Center librarian (whether the question is science related or not).

#### Procedures for Recording Scheduled Appointments

When the patron asks to meet with a particular liaison librarian or subject specialist (e.g., "the education librarian," "psychology librarian," etc.), write the patron's full name in the appointment book next to the librarian's initials. See the posted list of Library Fund Managers by Subject or Department to identify the appropriate librarian.

When scheduling an appointment hours or days in advance, also record the patron's name, even if the patron does not request the librarian by name.

#### Procedures for Making Referrals to Librarians

## REFERENCE SERVICE GUIDELINES

Staff should encourage patrons to meet with the next available librarian, who will help them begin their search and perhaps make a referral to a subject specialist for further help. When a patron clearly needs specialized assistance, make an effort to schedule an appointment with the appropriate librarian.

If the librarian's hours listed on the reference appointment schedule do not suit patrons' schedules, encourage them to contact the librarian by phone or e-mail to arrange a more convenient appointment time. Do not convey the message that a librarian is not available if he or she does not have a regular shift listed on the schedule. Make every effort to offer the librarian's business card and allow the patron to use a library telephone to reach the librarian or to leave a message with their name, brief reference question, phone number, and/or e-mail address.

Librarians are responsible for keeping their business cards stocked at the Service Desk, the first-floor reference consulting area, the Science Information Center, and the Electronic Information Training Center (EITC).

Librarians who are called to respond to a patron's immediate need should negotiate a convenient time to meet if they are busy with other obligations.

Please direct questions about reference and information services policy or reference-appointment procedures to [staff member's name].

Xavier University  
Xavier University Library  
Cincinnati, Ohio

Education Services

Research Consultations

Appointment required!

Consultation services are available by appointment at times convenient for you. Contact a specific librarian or your department's librarian liaison (see right menu). Consultation services are available in-person, over the telephone or through online chat. Faculty, staff and students may take advantage of consultation services.

To access an online chat consultation, follow the instructions below:

First, make an appointment with the appropriate librarian liaison (see right menu)

Then, click the online chat consultation icon which will take you to the consultation waiting room

The library encourages students to use this service for:

Automatically sending the results of search strategies to your email address periodically

Developing search strategies for senior research papers, dissertations or theses

General library orientation (using research databases, XPLORE, OhioLINK, electronic journal locator and document delivery services)

Preventing plagiarism with TurnItIn

Saving search strategies to run at another time

Using RefWorks (creating perfect bibliographies and in-text citations with the click of a button)

The library encourages faculty and staff to use this service for:

Adding library resources to Blackboard's main menu

Adding library resources to your courses in MyXU, the campus portal

Automatically sending the results of search strategies to your email address periodically

Creating electronic reading lists

Do-it-yourself electronic reserves

General library orientation (using research databases, XPLORE, OhioLINK, electronic journal locator and document delivery services)

Keeping current with RSS (Really Simple Syndication) feeds

## THE ACADEMIC LIBRARY MANAGER'S FORMS, POLICIES, AND PROCEDURES HANDBOOK

Painless publishing with RefWorks or creating perfect bibliographies and in-text citations with the click of a button  
Preventing plagiarism with TurnItIn  
Saving search strategies to run at another time

Remember! You must make an appointment with your librarian liaison first.

### Service Priorities

State University of New York Cortland  
Memorial Library  
Cortland, New York

#### Service Priorities

##### General Statement

While on duty at the reference desk, librarians will give priority to activities involving direct service to individual users, as outlined below. The librarian on reference duty at night or on weekends may also be in charge of overall building operations; thus, building emergencies or other urgent situations may of necessity occasionally take priority over reference service. The librarian on duty is also responsible for monitoring and directing the activities of any reference assistants on duty.

##### Users in the Reference Area

Service to library users in the reference area takes priority over any other activity. Reference librarians, assigned to specifically scheduled hours, are expected to arrive and be ready to offer service at their scheduled times. Scheduled reference hours take priority over other work obligations.

Librarians on duty must balance the needs of all users in the area and must use judgment in determining how best to serve the users simultaneously needing assistance. Generally, extended reference queries are not answered when other users are waiting.

##### Telephone Queries

Responding to telephone calls receives a lower priority than responding to users in the reference area. Generally, the reference librarian will provide only brief responses on the telephone, and usually will give no more than three serial or catalog verifications for an individual telephone user. When the reference area is busy, the librarian answering a telephone query should do one or more of the following as appropriate to the circumstances:

- Put the caller temporarily on hold;
- Take the caller's name and telephone number and call him/her back;
- Encourage the caller to come to the library for reference assistance.

### Guidelines for Answering Specific Questions

University at Buffalo  
University at Buffalo Libraries  
Buffalo, New York

#### In the Library

Respond to ready reference inquiries, which generally require the use of a single source to answer a quick, factual question

Provide access to and instruction about remote bibliographic, full-text, and numeric databases

Offer help in clarifying research problems, developing good search strategies and finding and evaluating information

Introduce students and faculty to the use of new technologies in information access

Validate/check citations

Locate known items

Respond to directional questions

Help users navigate the Libraries' website (<http://ublib.buffalo.edu/>)

Help library users evaluate information sources

Refer people to other libraries or agencies when appropriate

Refer people to subject specialists (<http://ublib.buffalo.edu/libraries/staff/specsubj.html>)

Teach information literacy at levels appropriate to library users

Help library users perform basic technical operations, such as downloading, uploading, sending articles and using databases

Offer in-depth consultations by appointment

Rutgers University

Rutgers University Libraries

Newark, New Jersey

#### Service Definitions

**Information Service**—Basic/general information can be provided by librarians, staff, or trained student assistants—in person, by telephone, by electronic mail either to individual librarians or staff or through Ask a Librarian, or by the use of signs, printed or online finding aids and guides, and such electronic resources as IRIS, online indexes and other basic reference tools, and the Libraries' Web pages. It addresses the more routine information needs of patrons, including:

- Library holdings and bibliographic citations

- Library policies (e.g., Admission to the libraries, borrowing, interlibrary loan)

- Library hours/directions

- Ready reference (e.g., Brief definitions, brief statistical data, other concise factual information)

**Reference Service**—Reference service is provided by all the Rutgers libraries. Professional librarians provide the most in-depth service; highly trained staff or graduate assistants under the supervision of professional librarians may provide other levels of service. Reference Service may take place at the reference desk, in private consultations with reference specialists, by telephone, by correspondence, or by electronic mail either to individual librarians or staff or through Ask a Librarian.

Reference Service also includes the development and implementation of printed and online finding aids and research guides, computer systems, and user interfaces to support independent research and end-user searching.

Since the Rutgers University Libraries are part of an educational institution, reference service is often appropriately instructional in nature, fostering the client's information literacy and self-sufficiency by instruction in the methods of research, the tools of research (both printed and electronic), and the ability to evaluate the quality and relevance of the research material retrieved. Reference Service includes instruction in the use of bibliographic sources, assistance in developing research strategies, assistance in locating complex data, the retrieval of data through electronic means, etc.

At other times, especially in the smaller and more specialized of the Rutgers Libraries, or in cases involving clients with special needs, reference service might more appropriately take the form of providing factual answers or retrieving and packaging bibliographic or statistical data. In many instances, reference assistance involves the use of electronic resources available on either networked or standalone workstations or from such fee-based vendors as Dialog or STN. See Appendix 2 for detailed information about the Rutgers Online Automated Retrieval Service (ROARS).

## THE ACADEMIC LIBRARY MANAGER'S FORMS, POLICIES, AND PROCEDURES HANDBOOK

The mission of the library, the needs of the client, and the professional judgment of the reference librarian will usually determine the appropriate level of service.

### Whom We Serve, and Why

The primary community served by the Rutgers University Libraries consists of current faculty, faculty emeritus, students, staff, and administrators of Rutgers University.

The Libraries' reference and information services are available to all individuals on site, by telephone, by correspondence, and through the online Ask a Librarian service.

The Libraries may engage in mutually beneficial contractual arrangements. These include referral services for the New Jersey Library Network, METRO libraries, OCLC, and the Research Libraries Group. These reciprocal arrangements provide the needed services for Rutgers users who cannot have their needs met within the Rutgers libraries. The Libraries also provide services to certain university affiliates.

Reference service provided by a Rutgers library as a professional courtesy to outside users (other librarians, independent researchers, etc.) does not take the place of services provided by their primary library—whether school, public, academic, or special. In many instances, it will be appropriate to ascertain that outside users have already exhausted the resources of those libraries, or to refer such clients to other appropriate libraries, especially when we do not have the specialized resources needed or the professional expertise to handle their queries.

University at Buffalo  
University at Buffalo Libraries  
Buffalo, New York

Reference, information and instructional services are some of the most vital and visible expressions of the purpose and mission of the Libraries, and are key to the Libraries' role as a learning space for students, faculty, staff and the community. ASL faculty and staff provide a variety of services to meet the informational and instructional needs of library users, within the limits of time, staffing, resources and the professional judgment of staff. The overall goal of ASL Reference and Information Services is to provide services to information seekers when and where they need it, in real-time whenever possible. In all of our activities, we value:

Approachability

Accuracy

Information literacy—Teaching library users the process of articulating an information need, and then identifying, finding and evaluating the information to meet that need. See the ACRL Information Literacy Competency Standards for Higher Education ([www.ala.org/ala/acrl/acrlstandards/standards.pdf](http://www.ala.org/ala/acrl/acrlstandards/standards.pdf)).

A proactive approach—Initiating the reference process and encouraging library users to ask for assistance.

Intellectual freedom

Equity—To consider each individual information query to be of equal merit regardless of the age, gender, ethnicity, disability, sexual preference or English language proficiency of the person asking the question.

Informed Referrals

Confidentiality

Expertise and Knowledge

Librarians also conduct themselves according to the Code of Ethics of the American Library Association.

## Reference Service Evaluation

University at Albany  
University Libraries  
Albany, New York

### Evaluation of Reference Service

All librarians will be involved periodically in the collection of statistics and records of reference inquiries. Statistics and record keeping are essential in providing a factual base for review of reference service, staffing levels, and/or government-required statistical counts.

Periodic evaluation of reference services will be conducted under direction of the Librarian(s) in charge of Reference. Evaluations will measure and examine the quality of reference service, success of users in finding needed information, and/or user satisfaction. Data gathered through the evaluation process may also be used to analyze staffing levels and determine where improvements can be made.

## Types of Queries Answered

University at Buffalo  
University at Buffalo Libraries  
Buffalo, New York

### Limits to Reference Services

Reference staff will not:

- Perform research. Generally, users asking ready reference questions will have the information provided to them, while users with more difficult and involved questions will be instructed in how to conduct their own research.
- Interpret materials. Reference staff do not interpret information, such as medical, legal, financial, statistical, tax information, or class assignments.
- Offer legal, medical, tax, or financial advice.
- Violate the copyright law.
- Knowingly act in a manner that violates the Code of Ethics of the American Library Association ([www.ala.org/Content/NavigationMenu/Our\\_Association/Offices/Intellectual\\_Freedom3/Statements\\_and\\_Policies/Code\\_of\\_Ethics/Code\\_of\\_Ethics.htm](http://www.ala.org/Content/NavigationMenu/Our_Association/Offices/Intellectual_Freedom3/Statements_and_Policies/Code_of_Ethics/Code_of_Ethics.htm)).
- Recommend purchases of sources or other materials. Reference staff refer patrons to standard reviews of the work in question and advise the patron to examine the library copy, if available. Staff do not make recommendations regarding such purchases.
- Appraise books or artifacts. Reference staff do not appraise the private property of patrons. Patrons are advised to consult a professional appraiser.
- Perform genealogical research. Genealogical searches are not undertaken by reference staff. Catalog assistance and help locating standard reference sources are offered. The Business/ Government Documents Reference Center assists with queries about the Census. City directories? Most genealogy questions are referred to the public library (see [www.buffalolib.org/](http://www.buffalolib.org/)).
- Compile bibliographies. Reference staff will not compile or check bibliographies. Staff do assist patrons in the use of bibliographical tools and in identifying, interpreting, and verifying citations.
- Answer contest, quiz or trivia questions. No searching is done for answers to contests, puzzles, quizzes, etc. Assistance is limited to advising individuals about where they might locate such information.
- Lend reference materials. Reference materials generally do not circulate, however if the situation warrants, a special loan may be approved. See Section \_\_\_\_ for details.
- Interpret or complete class assignments. Staff members help patrons locate information for class

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assignments. When a class assignment creates a concern, the appropriate subject librarian is responsible for contacting the instructor. In some cases, the librarian on duty may initiate the contact with the instructor and then provide information to the subject specialist. Assignment information should be posted to the ASL "Reference Alerts" page and also sent to [specialty service]. Students with questions about the assignment itself should be referred to their instructors.

- Retrieve materials in the book stacks. Reference staff generally will not pull an item from the stacks and hold it for a patron who is calling on the phone.
- Proofread or edit student papers. Students are advised to consult The Learning Center's Writing Center for assistance (<http://tlc.buffalo.edu/lcwrite.htm>).

Phoenix College  
Phoenix College Library  
Phoenix, Arizona

### Legal Reference Questions

Library users with legal questions will be directed and taught how to use legal books, databases, and the Internet. Legal advice will not be provided.

### Medical Reference Questions

Library users with medical and/or drug questions will be directed and taught how to use medical books, the databases, and the Internet. Medical and drug advice will not be provided.

### Tax Reference Questions

Library users with tax questions will be directed to relevant books, databases, and the Internet for information. Tax advice will not be provided.

Rutgers University  
Rutgers University Libraries  
Newark, New Jersey

**Legal, Medical, or Pharmaceutical Advice**—The Libraries cannot provide legal, medical, or pharmaceutical advice in response to reference queries. Specific information may be read from manuals, but in most circumstances patrons will be referred to sources of information from which to draw conclusions.

University of Texas at Austin  
University of Texas Libraries  
Austin, Texas

### Special Inquiries

#### Class Assignments

Staff members help users locate information for class assignments. When a class assignment creates a problem for students and staff, the appropriate subject specialist is responsible for contacting the instructor about the present and possible future class assignments.

#### Bibliographies

Although staff members do not prepare bibliographies for individuals, they do assist users in compiling their bibliographies.

#### Interpretation of Material

Staff members do not interpret legal, medical, financial, or statistical information.

#### In-Process Materials

Users are not referred to Technical Services departments.



## REFERENCE SERVICE GUIDELINES

Staff members may use the online acquisitions database to check order and receipt status for books, serials, and other library materials. For more information about in-process materials, staff members contact the appropriate Technical Services section. When these areas are closed, questions are deferred until the next working day. Users are contacted as soon as the information is located.

### Circulation of Reference Materials

Reference materials are for library use only. Permission to borrow them is given only at the discretion of the reference staff member on duty following guidelines set by the specific library unit.

### Recommendations to Users on Personal Purchase of Books

When asked for recommendations, staff members refer users to standard reviews of the work in question or advise the user to examine the library copy, but they do not make recommendations.

### Appraisal of Books and Artifacts

Staff members do not appraise items. Users are advised to consult appropriate reference materials or a professional appraiser, but specific appraisers are not recommended.

### Genealogical Questions

Genealogical searches are referred to the Texas State Library and Center for American History, as appropriate. Staff members offer help in locating standard genealogical sources in the University of Texas Libraries and through the Libraries Web site.

### Contests, Puzzles, and Scavenger Hunts

Staff members, when they have evidence that a contest is behind a question, suggest appropriate sources but do not locate the information.

### Proctoring Exams and Signing Attendance Forms

Reference staff does not proctor exams. The Division of Continuing Education Testing Center proctors exams. Staff does not sign attendance forms for required study hall attendance.

## *SPECIAL SERVICE GUIDELINES*

### Mediated Database Searches

University of North Carolina Wilmington  
William Madison Randall Library  
Wilmington, North Carolina

In addition to the CD-ROM databases available for patron use, the Reference Department also provides a mediated search service. This service provides access to remote commercial database services, i.e., Dialog Information Service, EPIC (OCLC) and STN (American Chemical Society). Because these services charge the Library for connect-time and records printed, and because familiarity with the command languages is important for cost-effectiveness, librarians conduct these searches. Request forms for this service are available at the Reference Desk.

At the reference librarians' discretion, and with certain limitations, searches will be provided to UNCW students, faculty, and staff at no charge. Search charges which exceed the limitations specified in the Online Search Services guidelines may be charged to the individual's account. With proper authorization, fees may be charged to departmental or grant accounts.

For users not affiliated with UNCW, a 15% surcharge is added to the total cost of a mediated search. These searches are performed only if the demand for other reference services has been met, and a librarian is able to schedule this additional service.

## THE ACADEMIC LIBRARY MANAGER'S FORMS, POLICIES, AND PROCEDURES HANDBOOK

Vassar College  
Learning and Teaching Center  
Poughkeepsie, New York

### Mediated Database Searching

The purpose of the mediated database searching service is to support the academic and scholarly research needs of Vassar faculty and students by supplementing the readily available indexes and abstracts. Request forms for database searches may be filled out at the Reference Desk. Please allow 3–5 days for processing of the request. There is no charge for this service

### Distance-Learning Students

North Seattle Community College  
North Seattle Community College Library  
Seattle, Washington

#### The Seattle Community College

The Seattle Community College District Libraries strive to meet the special information needs of students in distance learning programs. Within the limit of our resources, we intend to provide library services to the distance learning programs equitable with that provided to the on-campus programs. These guidelines are intended to embody the philosophy of the Guidelines for Extended Campus Library Services prepared by the Association of College and Research Libraries.

The Seattle Community College District is developing distance learning programs unique to each campus. These programs have different histories, goals, and student populations. However, these programs are growing and will in the future have a significant impact on library resources and services. The following guidelines are meant to help the District Libraries provide services to these students built upon the Library programs and collections already in place. These collections and services will increasingly require further development off already established regional and state cooperative agreements among academic and public libraries to share resources. Continued development to meet the expanding needs of these programs will require specially allocated revenues outside of existing library budgets.

#### Guidelines

**Library Support Services:** A district-wide committee comprised of library faculty, in cooperation with the District Distance Learning Committee, shall be responsible for gathering information, developing proposals, and bringing that information to the District librarians for approval. This committee shall recommend the development of services to distance learning faculty and students appropriate to the modes of instructional delivery offered by these programs. The recommendations will take into consideration the changes in delivery mode, information technology, and development of new programs. Each campus library representative will maintain communication with the distance learning programs on their own campuses to inform this progress.

**Reference Services:** Each campus library Reference Desk and Circulation Staff will provide points of service to distance learners and instructors. The level of service provided should be consistent with that provided to all on-campus students. The establishment and maintenance of e-mail reference service and a shared toll-free telephone number, for use by distance learning students, should be a priority for the district libraries. We should also investigate new possibilities, such as virtual reference service.

The service we are able to provide will be spelled out in a brochure for instructors and students to be included in their orientation and course packets. Students must understand that our role is to help them become independent information users. We will not do research for them, but help them use the resources available to them wherever they are by helping locate resources and making referrals.

**Bibliographic Instruction:** Instruction on how to conduct library research should be consistent with the mode of instruction of the program in which they are enrolled. The instruction may take the form of

printed, recorded, or electronic media. The development and delivery of this instruction will require the support of the parent institution's distance learning programs for students requiring services and materials not already included in the current library budget. Distance learning programs must take these costs into consideration when developing new programs.

**Access to Resources:** The libraries will attempt to accommodate students who require resources which are not available remotely and will encourage instructors to consider access to resources as they develop distance learning courses. Students will be encouraged to make use of local community college and public library resources, including Interlibrary Loan services.

Materials may be provided on a case-by-case basis, depending on circumstances of individual students. Any document delivery—e-mail, fax, or conventional mail—will be consistent with current copyright law. Students who are close enough to use District libraries in person will receive the same level of service provided to all campus students.

Students enrolled in courses through SCDD will have access to online databases on campus or through a password, consistent with services provided to on-campus students. Passwords will be made available to distance learning faculty for distribution to students on a quarterly basis. Individual students will be given passwords upon request when they provide their last name and last four digits of their student identification number. Requests may be made by phone, e-mail, or in person.

**Service Agreements:** Whenever distance learning programs develop courses, they must take the costs of library resources and services into account in their budgets. When geographically concentrated distance learning students require library services beyond those which are normally available through Seattle Community College Libraries and local public libraries, library service agreements should be established with local libraries to compensate for services provided to students registered at Seattle Community Colleges.

**User Surveys:** Surveys should be conducted on a regular basis to get information from faculty and students to discover: where students are located, what kinds of information and technical help they need, and how well the library services and resources are meeting their needs.

**Additional Services:** Proctoring is not a regular library service and will be available at the discretion of individual campus libraries. This service may be referred to the campus testing center.

University of Scranton  
Weinberg Memorial Library  
Scranton, Pennsylvania

The University of Scranton's web site is changing and policies will be separated from information on the updated sites.

### Eligibility Policies

As a student, you are eligible for services when:

- you are currently enrolled in University of Scranton credit courses being delivered either off-campus or via the Internet OR you are completing an independent study or internship off-campus, AND
- you currently reside off-campus, AND
- you have registered for a Distance Learning Library Services account.

As a faculty member, you are eligible for services when:

- you are teaching all of your University of Scranton credit course(s) at off-campus locations or via the Internet, AND
- you do not have office hours on campus, AND
- you have registered for a Distance Learning Library Services account.

## THE ACADEMIC LIBRARY MANAGER'S FORMS, POLICIES, AND PROCEDURES HANDBOOK

Note: A Distance Learning Library Services account must be established by completing the online Registration Form prior to receiving distance library services. The Library reserves the right to refuse services to those individuals whose information it cannot verify.

### General Information

Register online using the Distance Learners' Registration Form—or print the registration form and either fax or mail the completed form.

The following services are available ONLY to Registered students and faculty:

Delivery of articles from the Weinberg Memorial Library—Articles from newspapers, magazines, or journals that are unavailable online are either faxed or mailed to you. You will be billed \$1.50 for each article sent to you. A total bill for all articles sent during the semester will be added to your library account at the end of the semester.

Delivery of books from the Weinberg Memorial Library—Books are shipped to you by UPS. You are responsible for returning all books to the Weinberg Memorial Library at your own expense, using UPS Ground (contact us first if you must use other shipping options). Use the return label that is provided.

The following services are available to all University of Scranton students and faculty:

Remote Access to the Weinberg Memorial Library's Catalog via any standard Web browser with Internet access. The catalog contains books and other materials owned by the Library.

Remote Access to full-text articles from over 15,000 electronic periodicals (newspapers, magazines, and journals) contained in over 100 electronic databases to which the Library subscribes via a standard Web browser with Internet access using a Proxy Server.

### Options to Get Books

Search the Weinberg Memorial Library's Catalog.

If the book you want to borrow is available, then complete the Document Delivery Book Request Form. If you have registered for a Distance Library Services account, the book(s) will be sent to you. Allow 5–7 working days for delivery.

Search WorldCat from the Library's list of databases to find a library located near you that has the book that you want.

Once you've identified some libraries near you, contact them to see whether or not they will allow you to check out books.

Search the PALCI Catalog. PALCI is a joint catalog for a consortium of academic libraries mainly located in Pennsylvania. Allow 2 weeks for delivery.

You may directly request books found in the PALCI catalog by using your Royal ID as your login password. **IMPORTANT:** You must select Weinberg Memorial Library as your "Pick-Up Location" option.

If you do request a book, you will receive a confirmation e-mail from PALCI. Forward this e-mail to the ILL Department staff ([interlibrary-loan@scranton.edu](mailto:interlibrary-loan@scranton.edu)) at the Weinberg Library to notify them that you have requested a book.

When the book arrives, it will be sent to you at no charge, but you are responsible for returning the book to the Weinberg Memorial Library by the due date at your own cost using UPS Ground. Use the return label that is provided and send the book back to the Weinberg Memorial Library.

Please do not remove the blue band around the front cover of the PALCI book.

**IMPORTANT:** Do NOT return books to the original lending library. The book will remain on your University of Scranton account until we receive the book. If it is not returned to us, you may be charged for a lost book.

If the book you want is not owned by the University of Scranton and is not available from PALCI, request it by using the Electronic Interlibrary Loan Book Request Form. Be sure to select the Borrower Status of

“Distance Student” from the drop-down menu. Allow 3–4 weeks for an Interlibrary Loan book to be delivered to you.

When the book arrives, it will be sent to you at no charge, but you are responsible for returning the book to the Weinberg Memorial Library by the due date at your own cost using UPS Ground. Use the return label that is provided and send the book back to the Weinberg Memorial Library.

Please do not remove the yellow band around the front cover of the Interlibrary Loan book.

**IMPORTANT:** Do NOT mail books back to the original lending library. The book will remain on your University of Scranton account until we receive the book. If it is not returned to us, you may be charged for a lost book.

#### Options to Get Articles

Full-Text Articles via databases on the Weinberg Memorial Library’s Web page.

Articles available in Print format at the Weinberg Memorial Library.

Articles not available in any format at the Weinberg Memorial Library may be ordered through Interlibrary Loan.

#### Search for Articles

You may search for articles by topic in one of the Library’s databases. If you already know which database you want, begin at the Databases by Title page. Note that the letter F in the column to the right of the name of the database indicates that there are full-text articles available in that database, the letter P indicates that there are only some full-text articles. If you’re not sure which database to use, begin at the Databases by Subject page and then click on your subject area for a list of databases in that subject.

To access the databases remotely:

From the list of databases, click on either the “Off Campus” or the “Remote Access” link.

You will need to enter your User ID (Royal ID) and a Password (your birthday in the DDMMYY format), for example, if your birthday is April 7, 1984, then your Password is 070484.

Choose the database that you wish to search from the Database Menu.

For detailed instructions with screen shots, see Remote Access Instructions.

To search a database:

Enter your search terms. In databases where full-text is available, you have the option to limit your search to those articles for which the full text is available electronically.

If an article is full-text, then you have the option to print, e-mail, or save it.

If an article is not full-text, there may be a link to the full-text, or there may be a link to the Library’s catalog.

To get articles from journals in the Weinberg Library:

Check to verify that the Library has the issue and year that you want. To request the article, complete the Document Delivery Journal Article Request Form. The article will be delivered to your desktop. You will receive an e-mail notice containing a clickable link that takes you to a login page. To login, you must enter your complete e-mail address and the PIN that is in the e-mail. Save the article to a disk. You can print the saved document. You will be billed \$1.50 for each article sent to you.

To get articles from journals NOT available in any format at the Weinberg Library:

Request the article by completing the Electronic Interlibrary Loan Journal Article Request Form. Select the Borrower Status of “Distance Student” from the drop-down menu. The article will be delivered to your desktop. You will receive an e-mail notice containing a clickable link that takes you to a login page. To login, you must enter your complete e-mail address and the PIN that is in the e-mail. Save the article to a disk. You can print the saved document. You will be billed \$1.50 for each article sent to you.

## THE ACADEMIC LIBRARY MANAGER'S FORMS, POLICIES, AND PROCEDURES HANDBOOK

### Research Help

The Librarians in the Reference Department are your main contact for most questions. Check the List of Reference Librarians for one who has subject expertise in your area.

Telephone the Reference Department directly at (570) 941-4000. If you are calling long distance, a Reference Librarian will call you back. Call in advance to schedule an extended appointment. The Librarian with whom you have made the appointment will call you at the telephone number that you provide at the scheduled time.

E-mail your questions to the Reference Department by using the e-mail reference service, Ask A Librarian. E-mail reference questions are generally answered within 24 hours; however, response time may vary according to the academic calendar and library hours of operation.

Chat with us online using Virtual Live Chat during posted hours to get real-time help. Virtual Live Chat is monitored by librarians from the American Jesuit Colleges and Universities (AJCU) and Tutor.com librarians to provide 24/7 virtual chat reference.

\*Check the technical requirements for optimal performance on your computer.

To chat with specifically with a University of Scranton Librarian, login during the following hours: Monday 8–9 p.m.; Tuesday 10–11 a.m. and 8–10 p.m.; Wednesday and Thursday 3–4 p.m.

### Research Guides

Research guides are not meant to answer specific questions. Rather, they are guides to library resources to aid you in your research. Research Guides are available for selected fields only. Within each guide, electronic indexes available through the Library are listed first, print sources second, and internet resources last. Please consult a librarian for more detailed assistance.

## Extended Reference Questions and Reference Service

University of Texas at Austin  
University of Texas Libraries  
Austin, Texas

### Extended Reference Questions

When it becomes apparent that a question will require extensive searching, staff members on desk duty may offer to search further and make arrangements for reporting results. Reference staff members work on extended reference questions as time permits and consult other staff in their own or other units as necessary.

Weber State University  
Stewart Library  
Ogden, Utah

### Extended Reference Service

#### A. Definition

This type of service encompasses the unusual in terms of the time, effort, complexity, number and types of sources involved, and so forth.

#### B. Patron Classes and Priorities

Priority groups for extended service are, in order: WSU administration (deans and above), WSU faculty/staff, and WSU students. In general, extended service will not be given to those patrons who are not officially affiliated with WSU. Such patrons should be referred to those libraries or institutions specially established and equipped to meet the needs of these people.

#### C. The Extended Question

Individual judgment must be exercised by public services personnel as to what constitutes extended service or what the time and resource limitations are in any given situation while keeping in mind the patron class priorities established.

### I. Bibliographies

Bibliographies of materials housed in the Stewart Library collections may be compiled on request of campus faculty and administration. These may be used as class handouts or for workshops, discussion groups, seminars, etc.

Bibliographies may be annotated or not annotated depending on the given need and the amount of time available for completion. Costs of photocopying or printing will be charged to the department or the faculty member originating the request.

Bibliographies needed for projects funded by outside agencies may also be produced on request, provided appropriate funding for "library research" is allocated to the Stewart Library. Arrangements, for such projects are to be made through the Director of Information Services. Two copies of all bibliographies will be placed in the University Archives and twenty copies will be sent to the State Library Depository System for distribution to other institutions and agencies. The library, however, does not compile bibliographies to fulfill personal needs but in this case assists patrons in the use of the necessary bibliographical tools. Bibliographies produced to patron specifications may be printed from the DYNIX online catalog (see full description of this feature under Circulation, sec. VI.E.6).

### 2. Genealogy Requests

Genealogical searches are not undertaken. However, assistance is offered in the location of standard reference sources or genealogical service agencies.

### 3. Specialized Advice, Interpretation

Personnel serving at the reference desk may not offer interpretations or advice regarding legal, medical, financial, or "how to" information.

### 4. Reciprocal Exchange

The library supports reciprocal exchange of reference information among libraries of all types in pursuit of patron satisfaction. Incoming correspondence should be sent to the chair of the Reference Services Committee who will refer it to an appropriate person for reply. All replies should be made within one week of receipt of the original request. A copy of all correspondence should be kept in the Reference Services Committee files. As a general rule, several pages of photocopied material may be supplied free as part of a response so long as it complies with copyright law.

## D. Private Requests

Requests for extended research service coming from patrons outside the priority groups stated in section 2 above cannot be honored on library time by Stewart Library personnel. However, the Stewart Library has no policy prohibiting any library employee from privately contracting with patrons to do research or prepare custom bibliographies for a fee so long as that employee pursues the work on his/her own time. However, in this case the Stewart Library assumes no responsibility for the quality of the results.

## E. Special Services

Special services are unusual services in the sense that they go beyond the normal, required services provided the request for this type of special treatment usually comes from the faculty. An example of this is a request for the library to photocopy the tables of contents each month from selected journals in a certain discipline for distribution to a specific academic department on campus. Each request for special service shall be reviewed on a case-by-case basis by the library committee most affected. Since any decision has the potential of impacting the library image at large, the appropriate committee, after studying the request and the library's ability to meet it, shall offer a recommendation to the body of the library faculty

## THE ACADEMIC LIBRARY MANAGER'S FORMS, POLICIES, AND PROCEDURES HANDBOOK

who will make the final decision on the request. Primary considerations in each decision are the human, financial, and information resources available and the real or potential return benefits to be realized.

### F. Handling the Time-Consuming Question

For this type of question, the following options might be considered:

A subject specialist may be called in or referred to.

The patron could be informed of the time needed to answer the question and asked to return or check in later.

## Special Services

Golden Gate University  
Golden Gate University Library  
San Francisco, California

### Research Services and Support for Faculty via GGU University Library

#### How can University Library Staff Support Faculty and Faculty Use of Technology?

When you are developing curriculum guidance or planning a course, librarians can help you identify resources needed for the course—including textbooks, recommended readings, Web sites, etc.

We can help you design research assignments for students, and we can help ensure resources will be available so students can have a successful research experience.

We can order library resources needed to support your courses. (Please give us as much lead time as possible, so materials will arrive and be processed in time.)

Circulation Staff can arrange to put library materials on reserve for your class, so the materials will be available to all the students. If you wish to put some of your own materials on reserve, she can arrange for that, as well, and she can arrange to place materials on electronic reserves. It is ideal if you can make arrangements with Sylvia two weeks before the course begins, so materials will be ready when your students request them. Additional lead time is always welcome!

We can develop pathfinders, guides, and/or Web sites for your courses. Check out our Web site. Bookmark Library site for future reference. We'll work with you to create a guide for your course. By working with you, we are always learning new ways to create more effective guides. Some examples of guides we have created in the past include:

Web sites tailored to syllabi, such as:

Guides tailored to course assignments, such as:

- Current Business News
- Business Valuation for Accountants especially
- Researching U.S. National Economic Information and
- Researching U.S. Regional Economic Information
- Nonprofit Organizations Research Strategy Summary
- Theater and Society

We can provide research sessions in the library, in labs, or via Cyberconference for your students, so they can do their research most effectively. Although we also give workshops throughout the term, a seminar designed specifically for your course is the most effective way of ensuring that students will get the most out of their research experience. We'll tailor the seminar to meet your needs and the course assignments. Please give us as much advance notice as you can, so we can reserve the time you want, and so we can prepare an effective presentation. Contact sessions in library or in labs in San Francisco; contact . . . . to schedule research sessions in regional campuses or via Cyberconferences.

We can help you locate resources you need for your courses and your academic activities here at GGU. If we do not have the resources you need here, we can help you identify where they are located and



## REFERENCE SERVICE GUIDELINES

Dolores Neese can request them through Interlibrary Loan (ILL) for you. ILL charges will be billed to your account or to your department.

We can show you how to search Internet or commercial online and CD-ROM resources effectively, and how to locate and subscribe to professional discussion lists of interest on the Internet. Please contact Janice Carter if you cannot access the commercial databases from your offices at GGU campuses.

If you wish to access databases from other locations, stop by the Circulation Desk to have a Library Barcode placed on your faculty ID card. Please bring your faculty ID card with you whenever you come to the University Library, as you will be asked to show your faculty ID card when you enter the Library. If you do not have a faculty ID card, please check with staff in your academic department.

If you are teaching through the regional campuses, you can obtain a barcode from Steven Dunlap. Instructors in the Regional Campuses and Cybercampus may also want to consult Regional Campus Library Information a guide to services for students and faculty at Regional Campuses and Cybercampus, compiled by Steven Dunlap.

Virginia Tech  
Virginia Tech University Libraries  
Blacksburg, Virginia

The University Libraries offer a range of instructional opportunities designed to help faculty and students maximize their effectiveness in using information resources. Our goal is to ensure that all students are information literate.

Personalized services research aids:

- college librarian program
- tips (on effective library assignments)
- liveref & askus (online reference)
- course specific web pages
- subject pages

Seven steps to library research:

- evaluate Web information
- information skills online (self-paced)
- glossary of library terms
- citation guides
- copyright guidelines
- FAQ (frequently asked questions)
- handouts (research/databases/services, etc)

Classes & tours distance education:

- library instruction options
- schedule library instruction
- library tour options (individuals or classes)
- self-guided tours (PDF brochure)
- library maps
- Addison classes (effective searching instruction)
- instructional services
- distance education (information & contact)
- your college librarian
- contact information:
- your college librarian

## *TELEPHONE AND CORRESPONDENCE GUIDELINES*

### Telephone Reference

Rutgers University  
Rutgers University Libraries  
Newark, New Jersey

Telephone Service—Information or reference assistance given by telephone will generally be quite brief. Users in need of more extensive assistance may be advised to visit the library or referred to a subject specialist.

More extensive telephone service will be provided to other Rutgers Libraries, other institutions, and, when possible, to Rutgers faculty and students. In most such instances, these clients will be advised that librarians will call back with the desired information, as instant responses will not normally be feasible.

University at Buffalo  
University at Buffalo Libraries  
Buffalo, New York

#### On the Telephone

Respond to phone inquiries. Phone inquiries are lower priority than people at the desk, and staff are encouraged to use voice mail when working with someone in person. As a general rule, public services staff may limit the time spent on phone queries and encourage individuals with extensive research needs to visit the library in person.

Respond to voice mail left at reference desks after dealing with individuals at the desk. If unable to successfully answer a phone inquiry while at the desk, the request will be passed on to the next librarian or followed up after desk time concludes.

University of Texas at Austin  
University of Texas Libraries  
Austin, Texas

#### Telephone Reference Service

Telephone reference service is an integral part of reference and information service; however, priority is given to users who come to the library for assistance.

Information given over the phone is limited to short, factual answers, such as directory entries, or statistics quoted directly from the source; information about UT Austin library holdings; or information about UT Austin. Callers needing assistance with long or complex research questions are urged to come to the library for in-person assistance.

#### Training

The unit head is responsible for assigning and training staff members to answer the telephone. Staff members who answer the telephone should be courteous and efficient. Staff members should be familiar with University of Texas Libraries policies for telephone reference.

#### Priorities

General information calls which can be answered quickly are responded to as they are received. When telephone calls come at a busy time or when questions will take more than a few minutes to answer, staff members take down the question and the name and telephone number of the caller. Staff members identify themselves and inform the individual that the call will be returned, giving an approximate time.

In-person priority is given to calls from staff in other library units who are assisting waiting users.

#### Types of Questions Not Answered

## REFERENCE SERVICE GUIDELINES

Library staff members should not interpret statistical, medical, or legal information for patrons either over the phone or in person. No more than three titles are checked in the library catalog. Staff in a unit may find it necessary to set limits on telephone assistance relating to special materials held only in that location.

### Long Distance Calls

If an inquiry received by long distance cannot be answered immediately, arrangements are made to respond at a later time. For out-of-state telephone calls, the individual may be asked to call back. The name and telephone number of the staff member handling the inquiry as well as an approximate time to call back are given. In the event that it is difficult to estimate the time needed to prepare a response, the staff member will return the call.

### Photocopying

A maximum of eight pages may be photocopied from hard copy without charge when answering a long distance telephone call. If photocopying exceeds eight pages, the citations are given to the inquirer with instructions to request the items through his/her local library from Inter-Library Service or to request the item through the University of Texas Libraries Document Express service.

### Telefacsimile

Telefacsimile may be used when time is of utmost importance, particularly when information is for another state agency. A maximum of eight pages from hard copy materials may be sent by telefacsimile without charge.

## Correspondence Reference

University of Texas at Austin  
University of Texas at Austin Libraries  
Austin, Texas

### Correspondence Reference Service

Correspondence is an integral part of reference and information services and every effort is made to answer written requests for information within a week of receipt.

### Routing Incoming Correspondence

All units of the University of Texas Libraries route letters to the appropriate library unit for reply.

The unit head is responsible for correspondence reference service. The responsibility for answering letters may be delegated.

Referral form letters may be used when sending an inquiry to another unit on campus for the information requested. One copy of the form letter is sent to the inquirer; one copy of the form letter and the original letter requesting information are sent to the unit receiving the referral and one copy of the form letter is retained as a record of the referral.

### Types of Questions Answered

Letters requesting bibliographic information about University of Texas at Austin theses and dissertations are answered in detail. If the number of titles concerned is large, e.g., theses concerning Mexican-Americans in Texas, a printout from the library catalog or photocopies of the thesis catalog cards involved should be made.

Letters requesting information about publications written by UT Austin faculty or staff members, sponsored by UT Austin departments or institutes, or published by campus bureaus are answered as completely as possible.

Letters requesting broad subject information require only a brief indication of sources with an invitation to visit the University of Texas Libraries for personal assistance or with a referral to a library near the correspondent.

## THE ACADEMIC LIBRARY MANAGER'S FORMS, POLICIES, AND PROCEDURES HANDBOOK

The Perry-Castañeda Library uses form letters to refer requests for genealogical searches to appropriate libraries. Requests for information about Texas residents are referred to the Center for American History and the Texas State Library.

### Photocopying

A maximum of eight pages is photocopied from hard copy without charge when a letter is being answered. If photocopying exceeds eight pages, the citations are sent to the inquirer with instructions to request the items through their local public library from our Inter-Library Service.

### Telefacsimile

Telefacsimile may be used when time is of utmost importance, particularly when information is for another state agency. A maximum of eight pages may be sent by telefacsimile without charge.

### Reply

Most replies are by mail. However, an electronic response is appropriate if the requestor includes an e-mail address.

### Record of Correspondence

Each letter received and a copy of the reply are retained in the unit for one year.

## FORMS

### Fee-Based Data Request Form

University of South Alabama  
University Libraries  
Mobile, Alabama

#### Patron Information (Required fields marked with an \*)

If you cannot provide the required information, write "unknown." Otherwise, if these fields are not filled in, your request will be returned to you. To keep your patron information, hit your browser's **BACK** button after you've submitted a request. The just enter the new search information and resubmit the request. **When using a public workstation, delete your patron information by clicking the Clear This Request button.**

\*First Name

\*Last Name

\*Full Mailing

Address  Include Zip Code

\*Phone Daytime  Fax

Include area code.

E-Mail

\*Status

Select a Status

USA ID #, Library

Card # or Phone

#### Search Information (Required fields marked with an \*)

If you cannot provide the required information, write "unknown." Otherwise, if these fields are not filled in, your request will be returned to you. To keep your patron information, hit your browser's **BACK** button after you've submitted a request. The just enter the new search information and resubmit the request. When using a public workstation, delete your patron information by clicking the Clear This Request button.

REFERENCE SERVICE GUIDELINES

Database(s) to  USA-Subscribed  
be searched  Dialog or STN—Please Specify if known

\*Search Topic

In narrative form, explain what you hope to find. List key terms or phrases—include both scientific and common terms.

Purpose of Search

Thesis, class assignment, grant proposal, etc.

Number of Citations to be Retrieved

Select a number

Years to be Covered  Current Five Years  
 Other Time Period—Please Specify

Language

Other Restrictions

Please specify

Delivery Method

Select an option.

\* I am aware that no guarantee as to to results can be made prior to search. The maximum cost acceptable to me is \$

\*  Please check box to indicate acceptance of disclaimer and maximum cost.

To keep your patron information if you've made an error or wish to submit a new request, hit the browser's BACK button after you've submitted a request. Then just enter the new search information and submit the request. When using a public workstation, delete your patron information by clicking the Clear This Request button.