

How to answer e-mail questions in Questionpoint, for L-net

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This document describes: when you answer e-mail questions, about question lists and question areas, which library gets the question, what to do when your library gets a new question, about shared follow-up, how to refer the question to another library, how to answer the question, how to request clarification from the patron and how to let everyone know you are unavailable for e-mail questions.

You answer e-mail questions when:

- a patron asks a new question using our e-mail form
- a patron's chat question requires follow-up
- another library refers a question to you
- it is library's your turn to check **shared follow-up** for questions

About question lists and question areas





This section is copied from the Questionpoint online help.

Questionpoint organizes your library's questions into lists to help you manage them. The question lists are located in two areas.

My Questions
New: 1
Active: 8
Question Lists
New: 57
Unassigned: 35
Active: 188
Followup: 45

Area	Description of area	To go to the area
My Questions	Your questions: All questions that are assigned to you	Click a My Questions link on the My QuestionPoint page. Or, click the My Questions tab in the Ask a Librarian module.
Questions	Your library's questions: All questions that are assigned to you or other librarians at your library, or are unassigned	Click a Questions Lists link on the My QuestionPoint page. Or, click the Questions tab in the Ask a Librarian module.

Each question area contains the following question lists:

Question list	Statuses included	Description of list
New	New 	Questions that need action by you or your library
Pending	Pending 	<p>Questions that need action by someone outside your library:</p> <ul style="list-style-type: none"> • A patron whom your library asked to clarify a question, or • A library or expert to whom your library referred a question for an answer
Answered	Answered 	Questions for which an answer has been sent to the patron.
Closed	Closed 	Questions that a librarian or patron has closed
Active	New Pending Answered	A combined list of all the questions in the New, Pending, and Answered question lists
Referred	New Pending Answered (Referred questions only)	<p>A combined list of those questions in the New, Pending, and Answered question lists that were referred for an answer by your library or to your library</p> <p>The list includes questions referred:</p> <ul style="list-style-type: none"> • By your library to another library in your group, to the Global Network, or to a subject-matter expert • To your library by another library in your group or by the Global Network
Followup	New Pending Answered	Questions that were referred from our live chat service, including New, Pending and Answered questions.

Which library gets the question?

Patrons that fill out our regular e-mail form at www.oregonlibraries.net/email do not get to choose which library the question is sent to. Instead, the question is automatically

assigned to one of the libraries available for general questions. The library assigned is the one that was least recently assigned a question from this form.

Questions from Oregon libraries that have filled out our second level reference form at www.oregonlibraries.net/escalate can choose which library to send their question to.

Questions that are marked for follow-up in live chat are sent to **shared follow-up** and are also assigned to the librarian that the patron chatted with, if that librarian works at an L-net partner library.

Questions that are referred to you from another library are sent to your library only, but the library that referred the question can continue to access it through their **active** list.

What to do when your library gets a new question

When your library gets a new question or is referred a question, your library will get an e-mail notification of the question. The e-mail is sent to the address your library has specified in your **e-mail notification preferences**, not the e-mail address for your login.

Someone from your library should log in and find the question on one of your question lists. If it is a new question, it will be on your **new** and **active** question lists, if it has been referred, look for it on the **active** list.

Click on the question to see the full view and click the **claim** button. After you have claimed the question, you can:

- a. Answer the question
- b. Request clarification from the patron
- c. Refer the question to another library

About shared follow-up

When a librarian refers a question to e-mail, OCLC sends the question to **Shared follow-up**. The question is also assigned to the librarian that worked on the chat call, if they work at an L-net partner library. The librarian is not notified by e-mail that there is a new question.

When you send an Oregon patron's question to follow-up, it is your responsibility to answer the question or refer it to another library. If live chat is busy, it will be easiest to do this when your shift is over.

Soon we will begin to cover the Questionpoint 24/7 Cooperative. When you send a cooperative patron's question to follow-up, the patron's home library will be responsible for answering or referring the question to another library – your role is finished.

You can access the questions by clicking on **Followup**. Click the question, and click **claim**, then you can work on it.

Some questions will be referred by OCLC cooperative librarians, and it is up to us to handle the follow-up. We will take turns checking for new questions in shared follow-up.

If it is your library's turn to refer questions, login in the morning and a few times throughout the day. Click on the **Followup** question list. Review each question, claim them, and refer them to an appropriate library.

How to refer the question to another library

Click on the question from the question list screen.

There is a drop down menu labeled **Refer To**. Click this and choose **Partner (Subscription)**. Click the arrow button in a circle.

On the next screen, type a note about why you are referring the question. Choose a library to refer the question to. If you do not see the library you wish to refer the question to, assign the question to L-net – Caleb or Emily will make sure it gets to the appropriate place.

Click Refer. The question will now be in your **pending** list. When the referral library answers the question, it will appear in your **closed** list.

How to answer the question

Click on the question from the question list screen.

Click the **Answer** button

Type in your answer.

Attach documents by clicking the **Browse...** button next to one of the attachment boxes.

Click Send Answer. The patron will get your answer by e-mail. The question will get move to your **closed** list.

How to request clarification from the patron

Click on the question from the question list screen.

Click the **Answer** button.

Type in your request for clarification for the patron.

Click **Request Clarification**. The question will show up in your **pending** list and you will be notified by e-mail when the patron sends a reply.

How to let everyone know you are unavailable for e-mail questions

If no one at your library is available to take e-mail questions, do two things. First, tell Caleb or Emily so that you will no longer get questions from the L-net e-mail form.

Second, deactivate your **profile**. This will keep other libraries from referring questions to you.

1. log in with the administrative account for your library
2. in the lower left, click **profile**.
3. click the **Deactivate Profile** button.

When your library is available for new questions again, reverse this process by telling Caleb or Emily that you are available for general or 2nd-level reference questions again and activating your profile.

1. log in with the administrative account for your library
2. in the lower left, click **profile**.
3. click the **Activate Profile** button. Caleb or Emily will log in and “accept” your profile before new questions can be referred to your library.