



Transcript Evaluation Criteria

Salutation/Interest

- Opened with a welcome or encouraging greeting
- Expressed interest in the question and the patron's information need

Question Acknowledgment, Clarification, & Answer

- Acknowledged the question being asked
- Clarified the question if necessary
- Conducted a reference interview by requesting any additional information required to successfully answer the question
- Demonstrated an understanding of the question being asked (e.g. by restating it, referring to specific details)
- Responded to the question fully
- Took the question as far as possible before referring the patron to their library or another contact
- Handled non-local question well

Source Citation & Instruction

- Cited the source used to answer the question
- Informed the patron how they found the information
- Explained the search strategy to the patron and recommended options for further research

Closing

- Checked that the patron was satisfied with the answer
- Offered more information if required
- Closed with an appropriate statement, inviting the patron to return

Tone

- Used scripts, chat lingo, emoticons appropriately
- Maintained a friendly, approachable, helpful tone throughout

Note: If any of the criteria above were not met, is there an obvious explanation?