Chasing the Sun.

**Checklist for Virtual Reference sessions.**

- Greet the user and use his/her name
- Identify yourself by name. You can use a false name, but use one. This is very important to establish rapport with the user. The other CTS librarians will see your real name.
- Use scripted messages where appropriate (quicker than typing)
- Copy and paste the user’s email into a blank email message screen in case you need to send a message later.
- If you do need to send an email message, confirm the email address with the user.
- Remember to make contact frequently – “little and often” is the best motto! Tell the user what you’re doing constantly.
- Conduct the reference interview as you would on the phone – ask for clarification to ensure you understand what the user needs.
- An Internet search may not provide the best answer – remember the range of library resources available. Use them.
- Confirm which library resources the user can access (you can’t send a database search result web-page – you had to log on to do the search remember)
- Don’t overwhelm the user with too much at once. Ask if more is needed.
- Ask if the information is on track. Get clarification all the way through the session.
- Cite all sources of information.
- Ask if the user has any more questions.
- Thank the user.
- Ask for an evaluation of the service.
- Encourage the user to use CTS again.