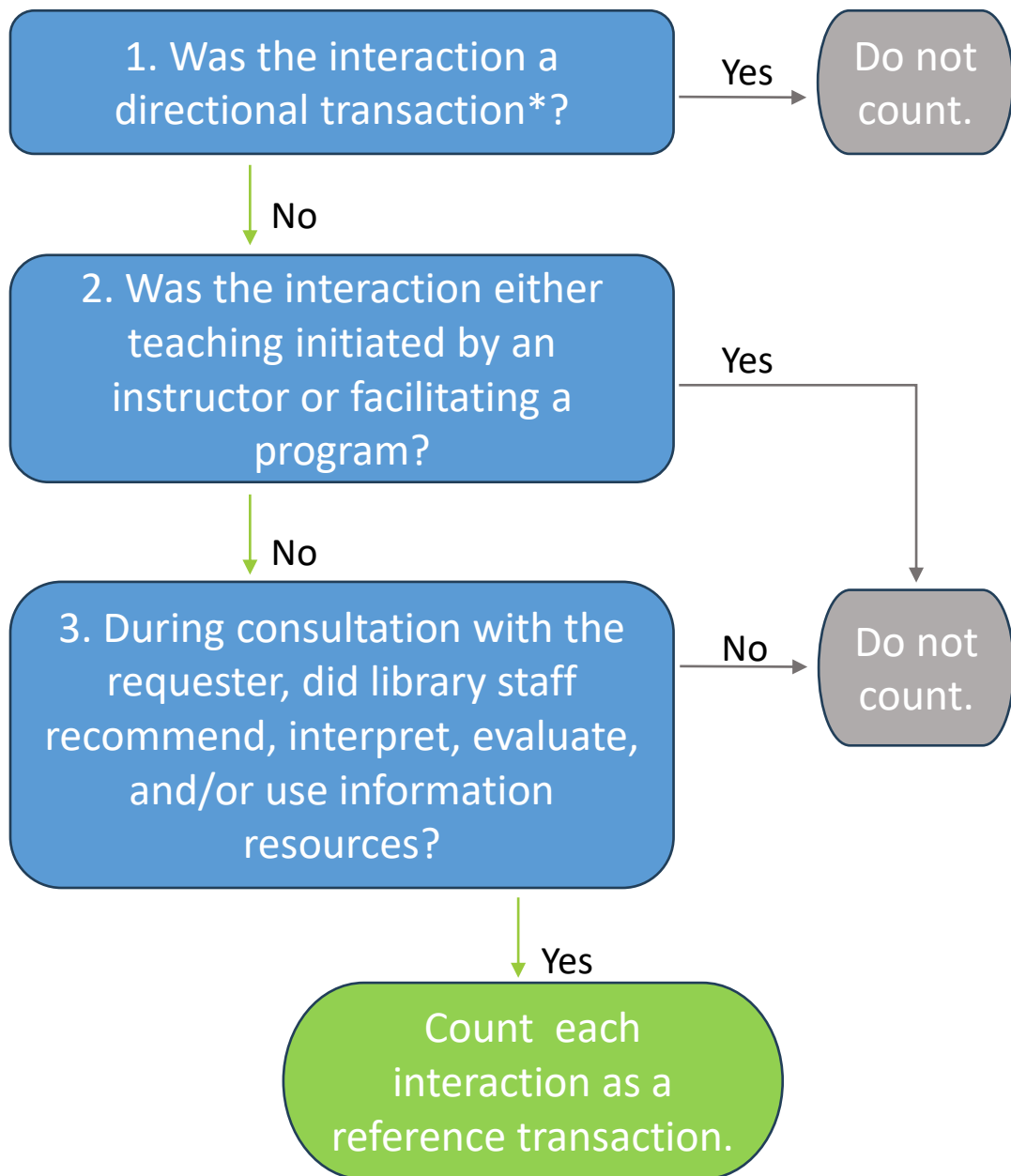


Reference Transactions



*Directional transactions include giving instruction for locating staff, library users, or physical features within the library.

Is this a Reference Transaction?

Example or Topic	1-Directional?	2-Formal Instruction?	3-Information Consultation?	Is this a Reference Transaction?
Show a patron how to use BadgerLink to find a magazine article	N	N	Y	YES
Can you help me make a photocopy?	Y	N	N	No
Perform a web search to locate instructions to connect a laptop to a WIFI printer	N	N	Y	YES
Where is the youth librarian?	Y	N	N	No
How do I request a book from another library?	N	N	Y	YES
Place a hold on an item	N	N	N	No
Online chat with a patron to help interpret a handbook or citation	N	N	Y	YES
Staff acts as an instructor to walk through a recent program a patron missed	N	Y	Y	No
Scheduled IT help for device or software	N	N	Y	YES
Register a patron for an upcoming event	N	N	N	No
Phone conversation to walk a patron through the city website	N	N	Y	YES
On-site proctor for a virtual course	N	Y	N	No
Help a patron find books related to their interest	N	N	Y	YES
Question that occurs during a program	N	Y	Y	No



IMLS Reference Transactions

The following paragraphs are excerpts from the IMLS definition for Reference Transactions in the Public Libraries Survey.

Reference Transactions are information consultations in which library staff recommend, interpret, evaluate, and/or use information resources to help others to meet particular information needs.

Reference transactions do not include formal instruction or exchanges that provide assistance with locations, schedules, equipment, supplies, or policy statements.

A reference transaction includes information and referral service, scheduled and unscheduled individual instruction and assistance in using information sources (including websites and computer-assisted instruction). Count Readers Advisory questions as reference transactions.

Do not include transactions that include only a directional service, such as instruction for locating staff, library users, or physical features within the library.

In addition, Wisconsin provides guidance that reference transactions may be counted regardless of the communication method. For example, reference transactions which occur in phone conversations, email, and on-line chat should be included.