Respond to the patron

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Overview

The Full Question page has two parts. The top part contains the question detail with patron information from the chat request form. It also contains various action buttons, lists, and links. The patron field contains the patron’s e-mail address as provided on the chat request form.

Tip: If the patron field does not contain the correct email address, you cannot send a message to the patron. However, if you know the patron’s correct email address, you can change the address so you can send a message. Click the Change Patron E-mail button to change the address. When you change the address, QuestionPoint creates a copy of the Full Question, except the new Full Question has the new patron email address, a new Question ID, and a note in the Question History describing the change. The new Full Question has the same status as the old one. You can then send a message to the patron from the new Full Question by clicking the Answer button. When you send the message, the transcript, or Question History is included.

The bottom part of the page contains the question history and action buttons. The history contains the transcript of the chat session, librarian notes, and system notes about librarian or patron actions.

Send a message to the patron from the Full Question page

1. Click the Answer button if the patron field contains the correct patron email address. QuestionPoint displays the Answer Question page. The page has two parts.
   - The top part contains the work area with various boxes, buttons, and lists for preparing a message to the patron. From this page, you can send three types of messages to a patron: answer, clarification request, status report.
     - **Send an answer** if you believe that you have the information that the patron needs.
     - **Request clarification** if you need more information from the patron before you can prepare an answer.
     - **Send a message** if you want to inform the patron about the status of the work on the question.
   - The bottom part contains all the information from the Full Question page.
2. Click the Full Question View link if you want to view all the information in a separate window while you work.
3. Prepare your message: include text and insert scripts or attach files as needed.
4. Click the Send Answer button to send an answer. The message is sent, the question status changes to answered (☑), and the question is moved to the Answered Questions list.
   **Or**

   Click the Request Clarification button to send a clarification request. The message is sent, the question status changes to pending (☐), and the question is moved to the Pending Question list.
When the patron responds to the clarification request:

- You receive an email notice,
- The response is added to the question,
- The question status changes to new (❓), and
- The question is moved to your library's New Questions list and your My New Questions list for follow-up.

Or

Click the **Send Message** button to send a message about the status of the work on the question. The message is sent but the *question status does not change and the question stays in the same question list.*