

Guidelines for Medical, Legal, and Business Responses

Originally prepared by the Standards and Guidelines Committee, Reference and Adult Services Division, American Library Association in 1992. Revised and updated by the Business Reference and Services Section, Reference and User Services Association, in 2000 and 2001. Approved by the RUSA Board of Directors, June 2001.

Introduction

This is the second revision of the guidelines developed by members of the American Library Association designed to assist information services staff in meeting user needs and in responding to users requesting medical, legal or business information. In this edition, revisions are focused on three issues: (1) new terminology, specifically the replacement of the term 'reference' with the term 'information services,' 'patron' with 'user' and 'librarian' with 'information services staff;' (2) recognition and incorporation of the impacts that rapidly changing technologies have on the delivery of specialized information services and source formats; and (3) change in focus of the original intention of the guideline from one of addressing the needs of non-specialists at general reference desks to one which addresses the needs of both specialists and non-specialists.

Serving as an enhancement to the information included in "Guidelines for Information Services" (2000), the following issues and perspectives specific to medical, legal, and business information service responses are addressed:

1.0 Role of Information Services Staff

1.0.1 A library's information services staff must have the knowledge and preparation appropriate to meet the routine legal, medical, or business information needs of their clientele.

1.0.2 Staff members need to keep current in subject areas and refer questions beyond their level of competency.

1.0.3 Libraries should develop written disclaimers stating a policy on providing specialized information service denoting variations in types and levels of service. The level of assistance and interpretation provided to users should reflect differing degrees of subject expertise between specialists and non-specialists.

1.0.4 When asked legal, medical, or business questions, information services staff should make clear their roles as stated in their library's specialized information services policies.

1.0.5 Information services staff members are responsible for providing complete and accurate responses to users' questions when possible and for guiding library users to the most appropriate resources for their information needs.

1.0.6 Staff should provide instruction in the use of the sources, enabling users to pursue information independently and effectively, if so desired.

1.0.7 If a user has trouble understanding a source, an alternative source should be sought for further explanation or for comparison. If no appropriate sources can be located, a referral should be made.

1.0.8 The information service transaction should satisfy the user's need for information, by providing either accurate sources in hand or clear and concise referrals to obtainable sources and/or services located elsewhere.

1.1 Advice

1.1.1 Libraries may advise users regarding the relative merits of sources, regardless of their medium, and make recommendations regarding library materials when appropriate.

1.1.2 Materials recommended should be the most comprehensive and the most current available.

1.2 Confidentiality

1.2.1 Confidentiality of user requests, both in-person and off-site, must be respected at all times.

1.2.2 Questions should not be discussed outside of the library except when seeking assistance with an information query and names should never be mentioned without the user's permission.

1.3 Tact

1.3.1 Information services staff should use discretion during the reference interview. While it is important to conduct a thorough interview, this should be done in such a way as to minimize discomfort to the user.

1.3.2 Staff should try to identify the issue in question without intruding on the user's privacy.

1.3.3 Information services staff should be impartial and nonjudgmental in handling users' queries.

2.0 Sources

2.0.1 Each library should evaluate and acquire appropriate sources in medical, legal, and business subject areas that are current, accurate, and accessible to meet the needs of the community served.

2.0.2 Users have a right to access information available in library collections within the parameters of copyright and licensing agreements. Information should not be withheld from a user unless the use of a resource in providing that information violates a licensing agreement.

2.0.3 Information services staff should direct the user to possible sources where the information the user requires would be provided. These sources may include in-house print and non-print collections as well as access to external resources.

2.0.4 Aids that assist users in identifying, using, and evaluating relevant sources should be made available.

2.1 Currency of Sources

2.1.1 Libraries should provide the most current information possible, consistent with the needs of the library's primary clientele and within the limitations of the library's materials budget and collection development policy.

2.1.2 User guides should be periodically evaluated to remove references to dated materials.

2.1.3 Information services collections should be weeded to withdraw or transfer dated materials to the general collections.

2.1.4 Currency of publication dates should be made clear to the user in the case of information and information resources of a time-sensitive nature.

2.1.5 Since information in medical, legal, and business areas changes rapidly, the user should be advised that there might be more current information available elsewhere on the topic.

2.2 Accuracy of Sources

2.2.1 Information service collections may provide more than one source that answers a user's request for medical, legal, or business information. Whenever possible, information services staff members should assist users in assessing the accuracy of information by providing alternate sources for comparison or explanation.

2.2.2 In cases where advertisements or solicitations may be misinterpreted as information content, staff should assist users in making the differentiation whenever possible.

2.3 Referrals to Other Sources

2.3.1 Information services staff should make every effort to answer users' questions in accordance with local information services and collection development policies.

2.3.2 If the question cannot be answered using available sources and personnel, they should be prepared to refer questions to individuals as well as to published sources in a variety of formats.

2.3.3 Referrals should be made to other sources only if the agency, service, or individual, will extend its services to that user.

2.3.4 Awareness of community, state, and private services outside of the library is important and referrals to services should follow any protocols in effect.

2.3.5 Staff may not make recommendations to specific lawyers, legal firms, doctors, other medical care providers or business professionals but may provide access to other information that may help the user identify and locate those resources.

3.0 Information Service Responses for Off-site Users

Off-site users include both affiliated and non-affiliated users requesting assistance from remote locations.

3.1 Special care must be taken with off-site requests for assistance since it is easy to misinterpret voice messages, and text-based communication may need explanations or interpretation.

3.2 Each library should develop information service policies that include provisions for off-site requests.

3.3 Requestors may have to be informed that the library does have information on the topic but that they will need to come into the library to use in-house print and non-print materials and for further research assistance.

4.0 Ethics

4.1 The American Library Association's current Code of Ethics (as stated in the ALA Policy Manual in the ALA Handbook of Organization) governs the conduct of all staff members providing the information service.