Transforming a Literature Search Service
Adapting a Reference Management System
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Prior Inefficiencies

Unstructured Requesting
Ex: A client emails the library, requesting a literature search on testosterone administration. No contextualizing details are provided about the topic or requester.

Duplicate Search Requests
Ex: In March, Jackie completes a search for a client on spina bifida and learning disorders. In August, the same client contacts Peggy for an identical search.

Repetitive Search Topics
Ex: In May, a PICU nurse requests a search on best practices for central line flushing. In July, a different nurse from Hem/Onc requests a search on best practices for central line care. In August, the same client seeks information on the topic.

Decentralized Records
Ex: A client had a search completed three years ago, by a now-retired librarian, and needs an update run with the original search parameters.

Lost Opportunities

Search Statistics
Ex: The library needs metrics to plan and design a new service line to support manuscript development and publication.

Data-Informed Strategic Planning
Ex: The library has a strategic goal to initiate a liaison service for nursing. Past nurse requesters could be identified as potential resources for a needs assessment.

Library Value Communication
Ex: Manager needs to highlight department value to the new CIO, demonstrating alignment with hospital strategic goals.

Lessons Learned

RefTracker Express forms are flexible and easy to customize.

Staff training, record audits, and form revisions improve entry compliance and reporting accuracy.

Demonstrating connections to hospital strategic goals and requiring ongoing surveillance.

Implement a RefTracker-automated literature search survey, deployed when records are closed.

Use system communication capabilities to record librarian-client interactions, rather than corresponding via email.

Staff View: Finding Search Strategies

Client View: Search Intake Form

Staff View: Search Answer Form

Requests by Reason

% Searches Using Prior Strategies

Data-Driven Solutions

Improve Workflow
The RefTracker form captures client demographics and request information. Librarians are notified of incoming requests awaiting allocation.

Archive Communication and Work Product
Closed records contain search documentation, strategies, correspondence, and related file attachments.

Leverage Search Expertise
Librarians search RefTracker to find, enhance, and reuse archived search strategies.

Improve Productivity
Librarians can identify duplicate requests and prevent rework.

We modified Altarama’s RefTracker Express to improve our search quality, increase efficiency, leverage search expertise and demonstrate alignment with institutional goals.