

History Notes M 645

BACKGROUND: In April 2022, the Policy, Training, and Cooperative Programs division began to include history notes in authority records for new and revised medium of performance headings. For headings first established since April 2022, the note indicates the month and year in which the heading was established. For headings established before that date and revised since, the note indicates at a minimum the immediately former heading and the current heading, along with the month and year in which the heading was revised. Information about earlier versions of the heading may also be present, if the information is readily available. The note is coded in MARC 21 field 688.

This instruction sheet provides guidelines on the use and format of history notes.

1. General rule.

a. Definition. A history note documents the date on which the heading was first approved and any subsequent changes to the heading. It does not document changes to other parts of the record, including references, scope notes, source citations, etc.

b. Number of history notes. Include only one history note in each authority record, and do not delete information from a note that already exists. Revise the history note as necessary by adding information to it, separating the pieces of information with a period.

2. New headings. History notes are generated automatically when proposals for new headings are approved. The note reflects the month and year in which the heading was added to LCMPT (which may not be the same month in which the proposal appeared on a tentative list). The name of the month is spelled out in full. The following format is used.

```
688 ## $a Established [month] [year].
```

Example:

```
688 ## $a Established March 2022.
```

3. Revisions to headings.

a. General rule. When a heading is revised and a “former heading” reference is provided, policy specialists provide a note that indicates the way in which the heading was changed and the month and year in which the change occurred. The field ends with a period. The following format is used.

```
688 ## $a Heading changed from [former heading] to [current  
heading] in [month] [year].
```

If a history note already exists in the record, new information is appended to it. Separate the elements of information with a period.

b. Special situations.

(1) Heading splits. Include a history note when a single heading is split into two or more headings. Follow the general format provided in sec. 3.a, giving the former heading as well as all of the headings into which it was split.

4. Adding history notes retrospectively. Policy specialists may add or revise history notes when references, scope notes, etc., are edited and information on the history of the heading is readily available, but the note should indicate only the date on which the heading (not a reference, etc.) was established and/or changed.

History notes may also be added or revised by policy specialists when research into the heading is undertaken for another reason (e.g., in response to a query).

History notes added retrospectively may be vague about the dates. Provide specific months and years whenever possible, but do not undertake extensive or time-consuming research only to provide that information. Use judgment when formatting the note; the goal is to document each change as clearly as possible.