*BACKGROUND: In April 2022, the Policy, Training, and Cooperative Programs division began to include history notes in authority records for new and revised subject 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 LCSH (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. *Examples:*

```
150 ## $a Dramatic music $z Southeast Asia
450 ## $w nne $a Dramatic music $z Asia, Southeastern
688 ## $a Established January 2002. Heading changed from
        Dramatic music--Asia, Southeastern to Dramatic music--
        Southeast Asia in August 2005.

151 ## $a Pijanec (North Macedonia and Bulgaria)
450 ## $w nne $a Pijanec (Macedonia)
450 ## $w nne $a Pijanec (Macedonia and Bulgaria)
688 ## $a Established March 1988. Heading changed from Pijanec
        (Macedonia) to Pijanec (Macedonia and Bulgaria) in March
        1990. Heading changed from Pijanec (Macedonia and Bulgaria)
        to Pijanec (North Macedonia and Bulgaria) in June 2019.
```

*b. Special situations.*

*(1) Subdivided headings.* Include a history note in the subdivided heading if the subdivision is being revised. If the only change is to the main heading, the history note in the record for the main heading covers the change. *Examples:*

```
150 ## $a Automatic test equipment
450 ## $w nne $a Automatic checkout equipment
688 ## $a Heading changed from Automatic checkout equipment
        to Automatic test equipment in June 2004.
```

```
150 ## $a Automatic test equipment $x Buffer stocks
```
    *[change does not affect the subdivision, so a 688 field is not added or revised]*

*3. Revisions to headings*

*b. Special situations.*

*(1) Subdivided headings.  (Continued)*

```
150 ## $a Church music $x Hutterian Brethren
450 ## $w nne $a Church music $x Hutterite Brethren
688 ## $a Heading changed from Church music—Hutterite
        Brethren to Church music—Hutterian Brethren in December
        2021.
```
*[change affects the subdivision]*

*(2) Phrase headings based on other headings.* Include a history note in the phrase heading. *Example:*

```
150 ## $a Automatic test equipment industry
450 ## $w nne $a Automatic checkout equipment industry
688 ## $a Heading changed from Automatic checkout equipment
     industry to Automatic test equipment industry in June 2004.
```

*(3) 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. *Example:*

```
010 ## $a sh2020006293 $z sh2005001761
150 ## $a Northern Idaho ground squirrel
450 ## $w nne $a Idaho ground squirrel
688 ## $a Heading changed from Idaho ground squirrel to
        Northern Idaho ground squirrel and Southern Idaho
        ground squirrel in September 2020.
```

```
010 ## $a sh2020006294 $z sh2005001761
150 ## $a Southern Idaho ground squirrel
450 ## $w nne $a Idaho ground squirrel
688 ## $a Heading changed from Idaho ground squirrel to
        Northern Idaho ground squirrel and Southern Idaho
        ground squirrel in September 2020.
```

*3. Revisions to headings.*

    *b. Special situations.*  *(Continued)*

        *(4) Name headings replaced by subject headings.* If the heading string changed, exclusive of the coding, provide a history note that describes the change. Follow the format described in sec. 3.a. *Example:*

```
010 ## $a sh2021008320 $z nb2012011789
151 ## $a Inu Jima (Okayama-ken, Japan)
688 ## $a Heading changed from Inu-shima (Japan) to Inu Jima
       (Okayama-ken, Japan) in December 2021.
```

        If the heading string did not change, do not provide a history note.

```
010 ## $a sh 95006691 $z n  93095889
150 ## $a International Women's Day
```
        *[heading string did not change]*

*4. Adding history notes retrospectively.* Policy specialists may add or revise history notes when references, scope notes, classification numbers, 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. *Examples:*

*4. Adding history notes retrospectively.  (Continued)*

```
150 ## $a Railroad cars $x Axles
450 ## $w nne $a Car axles
688 ## $a Heading changed from Car axles to Railroad cars—Axles in
      October 2006.
```
      *[Date on which the heading **Car axles** was approved was not available, but date of heading change was]*

```
110 2# $a Casa Aguayo (Puebla de Zaragoza, Mexico)
410 2# $w nne $a Casa Aguayo (Pueblo, Mexico)
688 ## $a Established June 2002. Heading changed from Casa Aguayo
      (Pueblo, Mexico) to Casa Aguayo (Pueblo de Zaragoza, Mexico) in
      July 2012.
```
      *[Dates of original inclusion and revision were both readily available]*

```
150 ## $a Ndebele language (Zimbabwe)
450 ## $w nne $a Ndebele language (Rhodesia)
450 ## $w nne $a Tebele language
688 ## $a Heading changed from Ndebele language (Rhodesia) to
      Ndebele language (Zimbabwe) in 1983. It was originally Tebele
      language.
```
      *[Date of approval of **Tebele language** was not readily available, and neither was the date of the change from **Tebele language** to **Ndebele language (Rhodesia)**. The year **Ndebele language (Rhodesia)** was changed to **Ndebele language (Zimbabwe)** was available in the 1983 quarterly* Supplement to LC Subject Headings*]*