



METRO Referrals

Referral Workflow

Visitor would like to access material at a participating library location.



Sending Librarian verifies that the material is not available locally.



Sending Librarian visits <https://airtable.com/shrlgyFUfpTTiRFxM> (please do not distribute this link) and submits a METRO Referral Request Form.



Receiving Library, Visitor, and Sending Library get an email with the visitor, title, and location information (this may take up to 15 minutes).



If possible, Sending Librarian prints a copy of the email for the Visitor to present at the Receiving Library.



Receiving Library confirms receipt of the request via email and, if needed, contacts the Visitor directly to arrange appointment scheduling and other details.

METRO Referral Request Form

Thank you for using METRO's referral service! Please complete and submit the form below. A referral request will go via email to the receiving library department, the visitor, and to the sending library department, for your records.

Note that the libraries named here represent all current participants in the referral service. You can opt into this service during the METRO membership renewal or joining process. Visit metro.org/join to learn more.

Sending Library *

+ Add

Sending Librarian *

First and last name

Sending Librarian Email

Or other email you'd like to receive this request, in addition to those listed above

Visitor *

Problems? Submit an [Issue Report](#).

METRO Referrals <referrals@metro.org>

to me, info, bcc: me ▾

Hi Reference Department,

Test Visitor, a(n) Member from Metropolitan New York Library Council (METRO) would like to visit you at:

Test Institution A

599 11th Ave

Fl 8

New York, NY 10036

Security Info: Please bring a printout of this referral email and a government-issued photo ID.

Visitor Notes: Please see open hours at <https://metro.org/>.

Test Visitor is looking for the following:

Title: Alice in Wonderland

Author: Lewis Carol

Call Number: 745.5928 C319

Record Link: [Link here](#)

Notes: Test visitor is hoping to visit next Wednesday.

Reference Department, please confirm within the next 1-2 business days that you've received this request by replying to this email. You can also reach Test Visitor directly at info@metro.org with any additional information about item availability, location details, open hours



METRO Referrals

Participants

You can see all participating libraries in the Sending and Receiving Library lists on the [METRO Referral Request Form](#).

Form Testing

If you'd like to test the form, please feel free to do so to/from your own institution or with "Test Institution A."

Form Security

The METRO Referrals form is intended for use by **library staff only**. Please refrain from distributing the form link to library patrons at any time. In the event that the link is made public, METRO will generate a new link and distribute it to participating libraries via email.

Library Security

For those institutions requiring a referral printout for security purposes, we're replacing yellow cards with a printed version of the referral email itself. Starting in early July, yellow cards will no longer be distributed.

Privacy

Anonymized referral request records are kept by METRO. To ensure the privacy of library patrons, we ask that all participating institutions adhere to the following privacy recommendations:

- **Delete referral emails** upon fulfillment of requests.
- **Anonymize referral records** that you keep independently, by removing names and email addresses.
- **Destroy email printouts** upon completion of referral visits.

Reporting

METRO can provide anonymized reports of referral requests sent and/or received by your institution as needed. Please note, however, that this data reflects request *submission* only, and does not track request *fulfillment* or actual visits to your library.

Problems? Feedback?

Not getting any emails? Unable to access the form? Please submit an [Issue Report](#) and bear with us while we work on resolving the problem.