



Midland PAL: guide to making a referral

First, identify whether the enquiry is best resolved through a referral:

- Is the information available in the 'home' library?
- Does the user need to borrow the item? If so, Inter-Library Loan may be a better solution.

If a referral *is* the best option:

1. Register the user:

- Check that the user is a current member in good standing of your library.
- Explain the process and provide an explanatory leaflet, prior to completion of the application form.
- Retain the application form and return the rest of the brochure to the user.
- Enter the user's details on the MIDLAND PAL Access Card, together with the appropriate expiry date.
- Issue the learner with his/her card.

2. Identify which library/libraries can provide the information, considering the locations in relation to the user's convenience. The MIDLAND PAL website may help with this.

3. Clarify if the appropriate library has unrestricted access or specific referral requirements.

If unrestricted access, ensure the enquirer knows how to get to the library, providing as much information about the library as is available / needed

- address/map/directions
- opening hours
- contact information for the library
- any other information that will make the visit easy and successful

If the library has specific referral requirements, ensure that the user is aware of these and assist him/her to deal with them. For example:

- Telephone in advance
- Provide locally agreed documentation: letter of referral, MIDLAND PAL Access Card
- If ID is required; ensure user understands what types of ID are acceptable

4. Give the user a MIDLAND PAL feedback form/card.

5. Complete the MIDLAND PAL referral data collection form.