Learn how to create a proxy patron, use proxies with WorldShare Circulation, and block a proxy patron.

Create a proxy patron

Add a proxy patron to an account to create a relationship between the users. The proxy patron must be added in the primary patron's account.

1. In the WorldShare Admin module, search for the patron to whom you want to add the proxy patron.
2. In the patron account, click the Proxies accordion.
3. Click Add Proxy.
4. In the Add Proxy window, search for the patron you want to make the proxy, and click Find. The proxy must already have a record in the system.
5. In the search results, locate the patron you want to make the proxy, and click Add. The Add Proxy window re loads.
6. In the Add Proxy window, enter a barcode for the proxy. This barcode should be different than their primary barcode.
7. Enter an Expiration Date. The expiration date must precede the expiration date of the primary patron. If you do not enter an expiration date, the date will be inherited from the primary patron.
8. Click Add Proxy.
9. The proxy patron is added to the Proxies section of the primary patron's account.

Note: The proxy account cannot be removed or hidden from the Proxies accordion once added. The proxy account can be blocked but will remain in the list of proxies.

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Circulation: Create proxy patron (04:50)

Proxy borrowing allows certain library patrons to perform actions on behalf of another patron. The first step in the process is to create a proxy patron using the Admin module in WorldShare Management Services.

Use proxies with WorldShare Circulation

Patrons sometimes need an employee, student, or family member to act on their behalf. Proxy accounts create the
necessary link between the primary account and its proxy.

For example, a research assistant may need to checkout items for a faculty member. As the primary patron, the faculty member can be given a proxy account to be used by the assistant.

Managing Accounts

- Proxy patrons are associated with the primary patron’s account and with the proxy patron’s personal account.
  - A primary patron can have one or more proxies.
  - A user can be a proxy for one or more primary patrons.
- Proxy users do not use the primary patron’s library card / account number.
- Library staff can:
  - Create proxy patron accounts and associate them with the primary patron through the Admin module.
  - See that the patron account is a proxy patron and the identity of the primary account.
  - Switch between a proxy user’s personal and various proxy-for accounts.
  - See the number and identity of the proxy patrons associated with a primary account.
  - Manually block a proxy patron’s account without affecting the primary patron’s account.

Loans and holds

- When acting as a proxy, a user has the same borrowing privileges and restrictions as the primary patron.
- A primary account is responsible for the items checked out and renewed by a proxy patron.
- A proxy patron cannot place holds from WorldCat Discovery on behalf of the primary patron.
- Library staff can see the items that were checked out by a proxy when viewing the proxy or primary accounts.
  - When viewing the primary account, the identity of the proxy user is displayed.
  - In Item Status, the proxy patron is displayed.
  - In Item Statistics, the proxy is listed in the Last Issued To field of the item they have checked out for the primary patron.
- In My Account:
  - The primary account can see all of its personal activity and activity carried out by its proxies.
  - A proxy cannot see activity related to the primary account, including activity carried out on behalf of that primary account.

Billing

- A primary account is responsible for all financial obligations incurred by the proxy account.
- Library staff can see any bills resulting from proxy patron activity when viewing the proxy or primary accounts.
  - When viewing the primary account, the identity of the proxy user is displayed.
  - Bills can be created manually via the proxy account.
  - Bills can only be resolved via the primary account.
- In My Account:
The primary account can see all of its personal bills and bills assessed because of the activity of its proxies.
A proxy cannot see bills related to the primary account, including bills assessed against the primary account because of proxy activity.

Notifications for a proxy account

Notifications are sent to patrons when they have bills, holds, schedules, overdue items, or recalled items. Notifications are created in OCLC Service Configuration (WMS Circulation > Notification Policy). For more information, see Notification Policy.

Notifications for a proxy account will be sent to either the proxy patron or the primary patron as follows:

<table>
<thead>
<tr>
<th>NOTIFICATION</th>
<th>SENT TO</th>
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<tbody>
<tr>
<td>Bill Notification</td>
<td>Primary Patron</td>
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<tr>
<td>Hold Pickup Notification</td>
<td>Proxy Patron</td>
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<tr>
<td>Hold Request Expiry Notification</td>
<td>Proxy Patron</td>
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<tr>
<td>Hold Shelf Expiry Notification</td>
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</tr>
<tr>
<td>Schedule Expiry Notification</td>
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<td>Schedule Placed Notification</td>
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<td>Loan Overdue Notification</td>
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<tr>
<td>Recall Notification</td>
<td>Proxy Patron</td>
</tr>
</tbody>
</table>

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Circulation: Check out to proxy patron (07:01)

Proxy patrons can check out library material on behalf of a primary patron. They can also place holds, view the items they have checked out and renew items they have previously checked out on behalf of the primary patron.

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Block a proxy patron

Blocking a proxy patron removes the relationship between the accounts. Blocking a proxy removes their proxy borrowing privileges. The block does not affect the primary patron. The proxy account will continue to remain listed on the primary account after the proxy patron has been blocked.

When an account is deleted, all proxy relationships associated with that account are also deleted.

1. In the WorldShare Admin module, search for the primary patron with the proxy patron you want to block.
2. Click the Proxies accordion.
3. Click the barcode of the proxy patron you want to block. The proxy patron's account will open.
4. On the Basic User Data accordion, click Edit (on the far right).
5. Select the Blocked check box.
6. Click Save.
7. On the confirmation window, click OK.