Find information about searching for, editing, creating, deleting, and managing patron accounts for group aware libraries.

When you are a WorldShare Management Services library with Group Aware, you have the ability to see patrons created by other institutions in your group. Though you can see all of your group's patrons, you can only perform certain actions with patron accounts that were not created at your institution.

Note: Patron policies are tied to the patron's home institution. For more information, see Circulation policies for group aware libraries.

**Search for patrons**

When you search for patrons, you can either limit your search to patrons only from your institution, or search through all patrons from your group.

This option is located on the left navigation, under Assist Patrons. The **Search patrons of all libraries** check box is automatically selected. If you want to search for only patrons from your institution, deselect the check box.

For details on how to search for patrons, see [Look up patron](https://help.oclc.org/Library_Management/WorldShare_Circulation/Configuration/Group_aware_for_consortia/Patrons/

**Patron search results**

The patron search results screen contains the **Home Institution** column, which allows you to see the institution in your group that created the patron account. In the image below, the Search patrons of all libraries check box is selected, and the search results include patrons with different home institutions. If you deselect the Search patrons of all libraries check box, results will only include patrons from your institution. Using the same example, if the check box was deselected, then only patrons from the South Library System would be shown.
View patrons

On the patron search results screen, click on a patron's Name to view their account. You can view any patron accounts created by institutions in your group.

If you use the WorldShare Admin module to view patrons, patrons that were created at your institution will show the patron's source system and user ID at source in the Account Info section. This section will be blank if the patron was not created at your institution:

For information on viewing patrons in the Admin module, see Search for users. For information on the Account Info section, see Account Info.

Edit patrons

You can only edit a patron's Basic User Data (in the Profile tab of the patron account) if the patron was created at your institution. When you view the Profile tab of a patron created by another institution in your group, you will not see any Edit links. The same also applies if you edit patrons in the Admin module. For more information on editing patrons
using the Admin module, see Edit users.

Create patrons

You can only create accounts for patrons that are from your institution. Patrons must have their accounts created at their preferred institution (in that institution's WorldShare instance) in order for that institution to be considered their home institution. You cannot select an institution when you are creating a patron. Your institution is automatically selected based on your WorldShare instance.

For details on creating a new patron, see Create new patron.

Patron barcodes

Patrons at different institutions in your group can have the same barcode, but patrons within your institution cannot have the same barcode. If you are searching for a patron by their barcode and other patrons in your group have the same barcode, a window will appear, and you will have to select the correct patron:
Patron type

When you create a new patron, you must assign them a Patron Type. Patron Types are created in OCLC Service Configuration and apply a Patron Type Policy to the patron based on the Patron Type selected. When you are in a group, you must determine how patron types will be used across your group. Patron policies are tied to the patron's home institution. For more information, see Patron policies.

Delete patrons

Patron accounts are deleted in the Admin module. When you search for patrons in the Admin module, and you view a patron account, the Delete User Record button will display at the top of the account, regardless of whether the patron is from your institution. However, you can only delete patrons from your institution. If you try to delete a patron who was not created at your institution, you will get an error message:

For more information on deleting patrons, see Delete patron record.

Bills

You can create bills for patrons within your group, regardless of their home institution.

If you want institutions in your group to be able to accept payment and waive bills for your patrons, you must create a Group Payment Policy in OCLC Service Configuration (WorldShare Circulation > Group Payment Policy). If you do not have a group payment policy set, institutions in your group can accept payments for your patrons, but will be unable to waive your patrons' bills. For more information on creating a group payment policy, see Group Payment Policy.

Note: Patron policies are tied to the patron's home institution. Patrons will only receive bill notifications based on what is set in their Patron Type Policy. For more information, see Circulation policies for group aware libraries.
Checkout items to patrons

You can check out items from your institution to patrons from other institutions in your group (depending on circulation policies).

Note: Loan policies are tied to the item's owning institution. For more information, see Circulation policies for group aware libraries.

Holds

You can place holds for patrons in your group (depending on circulation policies).

If the change does not conflict with library policy, staff with permission to create, edit, or delete holds can do so for any hold across the group. See Circulation account roles for more information.

Note: Hold policies are tied to the item's owning institution. For more information, see Circulation policies for group aware libraries.