Learn how to create and block proxy users as well as create proxies for your patrons using the Admin module.

Create a proxy user

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

1. Search for the user to whom you want to add the proxy user.
2. In the user account, click the Proxies accordion.
3. Click Add Proxy.
4. In the Add Proxy window, search for the user 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 user you want to make the proxy, and click Add. The Add Proxy window reloads.
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 user. If you do not enter an expiration date, the date will be inherited from the primary user.
8. Click Add Proxy.
9. The proxy user is added to the Proxies section of the primary user’s account.

Block a proxy user

Blocking a proxy user removes the relationship between the accounts. If you are using WorldShare Circulation, blocking a proxy removes their proxy borrowing privileges. The block does not affect the primary user.

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

1. Search for the primary user with the proxy user you want to block.
2. Click the Proxies accordion.
3. Click the barcode of the proxy user you want to block. The proxy user’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.
Using proxies with WorldShare Circulation

If you use WorldShare Circulation, you can create proxies for your patrons. Proxy patrons can check out items and place hold requests on behalf of a primary patron. Proxy patrons cannot view the account information of the primary patron, nor can they pay fines for the primary patron, even if the fines result from activities performed by the proxy patron.

In academic libraries, research assistants may be proxy patrons for professors.

Rules for proxy patrons, primary patrons, and library staff

If you create proxies for your patrons, the following rules apply:

Proxy patrons

- Are associated with the primary patron’s account and with the proxy patron’s personal account.
- Are listed in the Last Issued To field of the item they have checked out for the primary patron (Item Details > Statistics screen).
- Have the same borrowing privileges and restrictions as the primary patron.
- Any bills resulting from proxy patron activity will appear on both the proxy patron and primary patron accounts, but can be paid only from the primary patron account.
- Can be associated with multiple primary patrons.
- Use a proxy borrowing card, not the primary patron’s library card.
- Cannot see items that are checked out to the primary patron.

Primary patrons

- Can have multiple proxy patrons.
- Can see the items that were checked out on their behalf and identify which proxy patron checked out the item.
- Are responsible for the items checked out and renewed by the proxy patron.
- Are responsible for all financial obligations from the use of the proxy account.

Library staff

- See that the patron account is a proxy patron.
- See the primary patron with whom the proxy patron is associated.
- See the number and identity of the proxy patrons associated with a primary account.
- Create proxy patron accounts and associate them with the primary patron through the Admin module.
- Manually block a proxy patron’s account without affecting the primary patron’s account.

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:

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<tr>
<th>NOTIFICATION</th>
<th>SENT TO</th>
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<td>Primary Patron</td>
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<tr>
<td>Hold Pickup Notification</td>
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<tr>
<td>Hold Request Expiry Notification</td>
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<td>Hold Shelf 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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<td>Recall Notification</td>
<td>Proxy Patron</td>
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