PROCEDURE

CIRCULATION:
PROXY PATRON ACCOUNT

To Add a Proxy Patron to Another Patron’s List of Proxies:
- To Display the patron (faculty) name to whose list the proxy is to be added:
  - Select Patron icon > Type name > Find (or Enter)
- From the menu, select Patron > Proxy Patron
- At Proxy Patron Maintenance, search for Proxy Patron’s name
  - At Barcode field, use one of the following two methods:
    1. Click the hourglass button
    2. Search by the proxy’s name > Find (or Enter) Proxy name now appears in the Name field
    2. Type barcode of the patron to be added to the proxy list
  - In Expiration Date field:
    - Right click mouse for monthly calendar and click on date, or
    - Enter proxy’s expiration date
- Click Add > OK

To Charge Items to a Proxy Account:
- Select Charge > Magnifying glass > Type name of proxy (person picking up materials on behalf of another) > Find (or Enter)
- At the Charge screen, click the Proxy Patron icon (ghost) > OK
- At “Proxy Patron To” list, select the proxy’s sponsor patron > OK
- At the Charge screen, name of sponsor appears in the Name, Barcode and Group fields; name of patron who initiated the charge appears in the Proxy field
- Wand item’s barcode
- Item is charged to sponsor’s account

To Update or Change Expiration Date of a Proxy Patron:
- Search for faculty name to whose list the proxy was added
- From the menu, select Patron > Proxy Patron
- In Proxy Patron Maintenance, highlight patron on the Proxy Patrons list by clicking on the patron name field
- In Expiration Date field:
  - Right click mouse for monthly calendar and click on date, or
  - Enter a new date
- Click Update > Close

To Delete Proxy Patron’s Account:
• Deleting a proxy patron from the Proxy Patrons list removes the person from the list. If a proxy patron’s record is deleted from the database, the patron will also be deleted from any proxy patron list.
• To remove a patron from another patron’s Proxy Patron list:
  ➢ Select Patron icon to search for faculty name to whose list the proxy was added
  ➢ Type faculty name > Find (or Enter)
  ➢ From the menu, select Patron > Proxy Patron
  ➢ Highlight the patron to be removed
  ➢ Click Delete > Yes > OK