WorldShare® Circulation:
Patron Management
Class Handout

Patron Records

1: Access a patron record

To access a patron record directly:

- Click Assist Patrons
- Enter or scan the patron barcode
- Press enter or click Go

To search for a patron record (forgot their card):

- Click Assist Patrons
- Search for the patron by last name
- Search for the patron by first name
- Search for the patron by a partial name (for example, if your patron is Jennifer Fleming, search for Jen)
- Search by a partial barcode, if known

2: Review patron account overview

From the default Checkout screen of the patron record, see an overview of activity and key information:

a) Patron full name and barcode
b) If the patron also has a proxy borrower account, Personal Account or Proxy Accounts can be selected
c) Patron Type (borrower category) and Home Branch
d) Expiration Date for circulation and Last Activity date
e) Number of items checked out (overdue), outstanding bills, and holds (ready to pick-up)
f) Count of claims initiated by the patron (Claimed Lost, Claimed Returned, Claimed Never Had)
3: Create a new patron record (patron has no card)

- Click Assist Patrons
- Search for patron by name, to ensure the patron does not already have a record
- Click Create New Patron
- Enter information for required fields:
  - First name, Last name, Address, City, Postal code
  - Email: must have an email address to set a password and to receive notifications from the system
  - Barcode (follow library procedures for barcode assignment; if you enter a duplicate barcode, you will get an error message when you try to save the record)
  - Patron Type: select one of the categories from the drop-down list
  - Home Branch: select one of the available branch locations associated with your library
  - ID verified?: circulation policies can specify rules based on whether the patron has been ID verified
  - Circulation – Expiration Date: date which their circulation privilege will expire
- Click Create
- Message displays: “User was successfully created.”

- Click OK
4: Review sections of patron account

- **Checkout** – patron panel where items are checked out, list of items checked out to patron

- **Holds** – lists hold requests, including holds ready for pick-up; also section for Scheduled items. Can create hold requests, edit, and delete holds from this panel.
• Bills – outstanding bills and payment history
  Can pay, waive, cancel, and refund bills from this panel
    o Current charges, as well as total accruing charges displayed

![Bills Panel]

• Profile – basic user data is displayed and can be edited, including blocked status, expiration dates, and contact information. If a patron forgets their password, the set/reset password link will send them a link to update their password.

![Profile Panel]

Staff and public notes can be entered in the Profile panel by expanding the Notes section
Custom data can be added, based on your library’s configuration of these data fields.

- **History** – both circulation and notification history is available
  - History settings must be turned on in Service Configuration:
    - WMS Circulation > Admin/General > History
  - Staff account must have Circulation Desk role to see History tab

### Notification History

Notification history tracks type of notification, when sent, and status of delivery

### Simulation:

- Patron forgot card

- Patron has no card (Create Patron)
Proxy Accounts

5: Create a Proxy Borrower (patron) account

Proxy borrower accounts are associated with a primary patron account. The staff member creating the proxy borrower account must have access to the Admin tab.

- Click Admin
- Search for the Primary patron (e.g. the Faculty member for whom assistants will be checking out material on behalf of)
- Expand the **Proxies** section of the patron account (existing Proxy Borrower accounts associated with the primary patron are listed)

- To add another proxy account, click **Add Proxy**
- Search for the patron account to add as a proxy; the proxy patron to add must have a personal patron record in the system. Use the search drop down menu to select the search scope. Enter the search term.

- Click **Add**
• Enter **Barcode** (Note: the proxy borrower will have a barcode used for purposes of proxy borrowing transactions which will be separate from their primary barcode). Expiration Date must be the same as the primary patron’s Expiration Date. If left blank, this date will be inherited.

![](image)

• **Click Add Proxy**

![](image)

• **Click OK**

• This patron is added to the list of proxy borrowers associated with the primary patron.

**Block Proxy Borrowing account**

To remove proxy borrowing privileges from the account:

• **Click the proxy borrower’s barcode link**

![](image)

• **Click Edit**
• Check Blocked

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

6: Check out material using a Proxy Borrower (patron) account

• Click Assist Patrons
• Enter or scan the barcode of the patron
• If the patron provided their personal account barcode, “Personal Account” will be shown
• If they are checking material out on behalf of someone else, as their proxy, Switch to… Proxy Account
• Now, the patron is Proxy for primary patron
- If the patron provided the barcode of their proxy borrowing account, the **Proxy for** screen is displayed immediately
- Check Out items (circulation rules associated with the primary patron account are applied)

The primary patron account will reflect which proxy borrower checked the item out on their behalf.
Patron Accounts in WorldCat Discovery

7: Sign In with patron account

- In WorldCat Discovery, click **Sign In**
- Enter authentication credentials
- Click **Sign In**
- First name is displayed, with drop down arrow to expand

8: View checked out items, renew item

- From My Account, **Checkouts** displayed
- View list of items checked out
- Click **Renew** to renew an item (circulation rules will be applied)

9: View holds, place a hold

- From My Account, click **Holds**
- View list of items on hold, including those ready for pick-up
After a hold request is fulfilled, it cannot be removed or edited.

To remove or edit an open hold request, click **Remove** or **Edit**.

To place a hold on an item from WorldCat Discovery, patrons can:

- Search for the item
- Click **Place hold**

Select **Pickup location**, optionally set hold schedule.
Click Submit

10: View outstanding charges

From My Account, click Charges

- Fees and fines cannot be paid from WorldCat Discovery – this information is for viewing only.
- Each outstanding charge is listed. Overdue accruing charges are also shown (lower right)