Adding/Processing Proxy Users - DRAFT

- Proxy User Policies
  - Registration: filling out the proxy form
  - Alma: Adding someone as a proxy
  - Circulation: checking out materials
  - Requesting/ILL

Proxy User Policies

- A proxy is given when a sponsor has given permission for someone (proxy) to pick up materials on their behalf.
- If the sponsor is blocked, the proxy cannot check anything out on their behalf.
- The sponsor of the proxy sets the expiration date of the proxy.
- The sponsor is responsible for any fines and lost book fees incurred by materials checked out by their proxy.

Patrons may only check out books on behalf of other Patrons if they are registered as proxies.

Step-by-step guide

Registration: filling out the proxy form

1. Patron fills out form
2. Patrons submits proxy registration form to the Circulation Desk
3. Use a new paper proxy borrower card. They are white and located in the box where the barcode stickers are kept in the cabinet behind the circulation desk.
4. Get 2 matching barcodes from the barcode sheet and place one on the proxy card and one on the bottom right of the proxy registration form.
5. Issue a proxy card.

Alma: Adding someone as a proxy

1. Search proxy user in Alma, open account
2. Click “proxy for” tab in account

3. Click “add proxy for” button on right side under tab

4. Search the name of the sponsor

5. Select sponsor

6. Click “add user”

7. Click “save” at the top right when sponsor is listed

**Circulation: checking out materials**

1. In Alma, click “fulfillment” list

2. Click “manage patrons services”

3. Search for proxy, click name
4. Click "use proxy" box

5. Click "go"

6. A new dropdown menu will appear, select **sponsor** name

7. Click "go"

**Requesting/ILL**

- via Alma
  - **proxy** cannot request materials for **sponsor** via Alma
- via Primo
  - **proxy** cannot request materials for **sponsor** via Primo