

Proxy Borrowing – Development Request

Improve the proxy borrowing process by revising the following scenario:

Proxy borrower has items to check out, for themselves and others that they are the proxy for. Library staff prefers to check all items out to the account of the Proxy Borrower - the patron standing in front of them.

Current behavior:

1. The Proxy Borrower account is active and the item with a hold on it is scanned. (Item is on hold for another patron the borrower is proxy for.)
2. A pop-up appears saying there is a hold on the item and offers staff two options: (1) to go ahead and check it out to the Proxy (the patron in front of them), or (2) cancel the transaction.
3. If the item is checked out to the Proxy (after staff manually verifies hold pickup authorization)
 - The Holds Waiting message is removed from the original patron's Check out screen.
 - The hold is re-queued for the original patron as an active hold
 - The hold is not marked as issued in the original patron's hold history

Development request:

1. The Proxy Borrowing relationship is set up in Bibliovation authorizing a patron to pick up holds for other patrons.
2. The Proxy Borrower account is active on the check out screen and the item with a hold on it is scanned. (Item is on hold for another patron the borrower is proxy for.)
3. Bibliovation recognizes that the item scanned is on hold for a patron that the Proxy Borrower is authorized to pick up for so no pop-up appears. No pop-up will allow Proxy Borrowers to check out holds for other patrons (if they are authorized) on the self-checks.
4. As soon as the item is checked out to the Proxy Borrower:
 - The Holds Waiting message is removed from the original patron's Check out screen.
 - The **hold is a FilledReserve** for the original patron and the hold is not re-queued for the original patron as an active hold.
 - **The hold is marked as issued** in the original patron's hold **history with the borrower number of the authorized proxy. (AF)**

Please note: Currently in the Sandbox, the checkout screen of the Proxy Borrower allows staff to choose to check out to the Proxy Borrower in front of us (Self) or to the patron not present

who has authorized pick up by the Proxy Borrower. We prefer to check out to the Proxy Borrower in front of us and would like the option to check out to the patron not present removed or made as a setting that can be turned off.