

Manually Assigning a Hold in Banner

Purpose

A step by step process on how to manually assign and release a hold on a student account in Banner.

Guiding Principles and Common Practices

1. For security purposes, Hold Type codes are controlled by department, unit, or college designation and users are only allowed to apply/remove holds if they belong in the department, unit, or college that controls that specific Hold Type code.
2. A department requesting to place a financial hold on a student account must work with SBS.
 - a. A financial fee is when a department assigns a fee to the student account.
 - b. Departments do not have the authority to place financial aid holds
3. Requests via the Enrollment Adjustment Form will not be processed if a student has a registration hold.

Impacted Departments, Units, Programs, and Centers

1. Registrar's Office
2. Student Business Services
3. Undergraduate Admissions
4. Academic departments
5. College Offices
6. Student Health Services
7. Student Conduct

Procedures to Assign a Hold Manually

1. Go to **SOAHOLD** - SOAHOLD contains all department and advising student holds EXCEPT for Financial Aid specific holds.
2. Input **SID**, press **Next block**, and go to first blank **Hold Type**

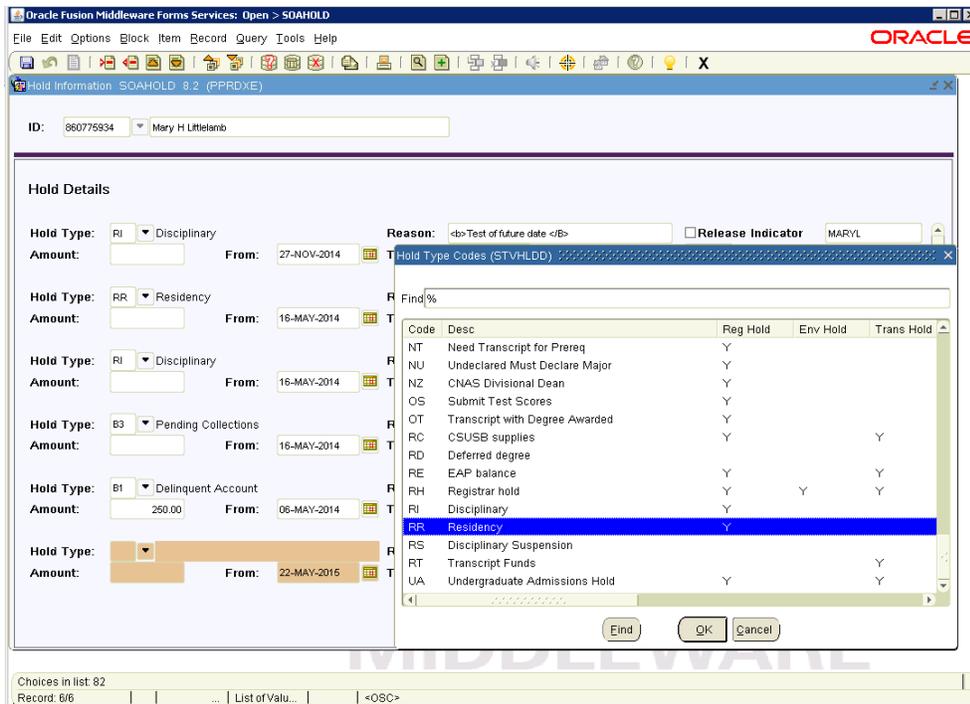
The screenshot displays the SOAHOLD application window. At the top, there is a menu bar with options: File, Edit, Options, Block, Item, Record, Query, Tools, Help. Below the menu is a toolbar with various icons. The main content area is titled "Hold Information: SOAHOLD. B.2 (PPROX)" and contains a search field for "ID:". Below this is a section titled "Hold Details" which lists several hold records. Each record includes fields for "Hold Type", "Amount", "From" (with a calendar icon), "To" (with a calendar icon), "Reason", "Origination Code", and "Release Indicator". The first record shows a hold from 21-MAY-2015 to 31-DEC-2009. The other records have empty fields for "From" and "To".

3. Type in the Hold Type Code.

- a. If you do not know the **Hold Type** code, select the **drop down arrow** next to **Hold Type** and it will open **STVHLDD**.
 - i. STVHLDD is the validation table that lists all Hold Codes. Codes are categorized based on the first letter of the code. Below is a list of all the **Code letters** and its corresponding department.
 - A** = CHASS
 - B** = SBS
 - C** = STUDENT CONDUCT
 - E** = BCOE
 - F** = SOBA
 - G** = GRAD DIVISION
 - H** = HOUSING
 - M** = SOM
 - N** = CNAS
 - O** = GSOE
 - P** = PUBLIC POLICY
 - R** = REGISTRAR
 - S** = STUDENT HEALTH SERVICES
 - U** = UG ADMISSION
 - W** = CASHNet (SBS)
 - Z** = MISCELLANEOUS (ARC, Summer Session, etc.)
 - ii. STVHLDD will classify what the hold will actually hold. There may be times where a hold will not hold the student from doing any process, but it is used for internal identification for jobs (i.e. a refund hold).
 - iii. If you scroll all the way to the right you may see some with 99 in the column VR Msg No. This means that the hold prohibits the diploma from being released.

Hold	Grade Hold	AR Hold	Application...	Complianc...	VR Msg No	Disp Web
			N	N		
			N	N		
			N	N		
			N	N		
			N	N		
			N	N		
			N	N		
			N	N		
			Y	N	99	Y
			Y	N	99	Y
			Y	N	99	Y
			Y	N	99	Y
			N	N	99	Y
			Y	N	99	Y

- b. Click on your **Hold Code** to highlight it
- c. Click **OK**



- Reason field** – we are not using this field. If you need to provide a note, please use **SPACMNT** and save a longer comment/note associated with the hold. **The Reason Field does show to the student in self-service.**

The long description and instructions to the student on how to resolve the hold are controlled by an administrative set up within R'Web. If you need this information updated for the hold at any time, please contact Student Affairs Information Systems (SAIS).

Students will view their holds through R'Web. If the student has a hold(s) a window box will pop up when he/she logs into R'Web. They will also have an icon to click on through R'Web to view their holds.

Students are prompted that they have a hold in various self-service areas like registration and the student profile. This information will provide them the basic information and then they will use the icon in R'Web to understand the full details of the hold and how to resolve it.

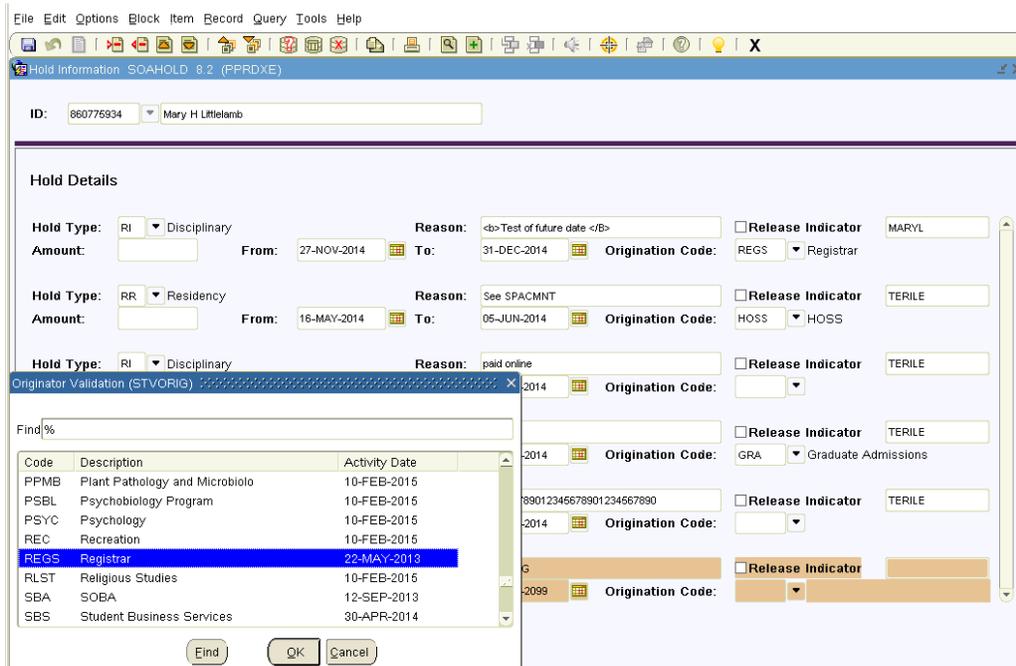
- Please note that holds in Banner are date based and not term based. Once a hold is effective it will hold the designated process regardless of term. For example, if you place a hold which holds registration it will hold registration adjustments for all terms, not just for a future term that is about to open for registration.**

In many cases holds are intended to prevent students from registering. Therefore, the below Date Grid provides suggested effective dates to use to impact registration for the next couple of terms. In most cases you want the date to be in line with when the Schedule of Classes becomes available online for the future term which is available in the [Academic Calendar](#).

Main term you want to hold for	Date hold should be effective
Spring 2016	28-Jan-16
Summer 2016	28-Mar-16
Fall 2016	5-May-16

****Please note that if you are placing a hold to impact Summer Session registration -- Due to the timing of the start of Summer Session registration (April 1st) the hold will also impact adjustments a student may want to do during drop/add of spring quarter.**

- a. Enter the date you want the hold to be effective in the **“From”** box and press **TAB** or
 - b. If the from date should start today, Press the **“T”** key followed by **“TAB”** and the date will default to the current date.
 - c. By default the **“To”** box will have **12/31/2099**. Meaning that the hold is active until the end of time.
6. **Origination Code** – include the department the hold is associated with.
- a. The student will not be able to see the netid. The student will see the department that placed the hold under **Origination Code**.
 - b. Staff who have access to SOAHOLD will see the netid
 - c. If you do not know the **Origination Code**, select the drop down arrow next to it and it will open **STVORIG**.
 - i. STVORIG is the validation table that lists all the departments/programs.



- d. Select your department/program that is associated with the hold you are assigning and press **OK**.

7. Press **SAVE**

Procedures to Release a Hold

1. Go to **SOAHOLD**
2. Enter **SID**
3. Utilizing your arrow keys navigate to the hold you want to release
4. Go to the **To** field and Press the **"T"** key followed by **"TAB"** and the date will default to the current date if you want to release the hold immediately.
 - a. If you want to plan to release it for a future date you can enter that date and when that date is reached the hold will release at that time.
5. Press **Save**
6. The hold is now released.