

MANUALLY ASSIGNING A HOLD IN BANNER

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REVISION HISTORY

Version	Date	Name	Description
	06.19.18	Liz Alday	Banner 9 Update

INTRODUCTION AND PURPOSE

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

RELATED POLICIES, REGULATIONS, 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 and they are requesting to add a class or changing variable units.

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

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, go to R’ Space and select the Banner Training icon in order to follow along and practice. Please submit a ticket if you have trouble accessing Banner Training.

PAGES

The pages listed below are covered in this training.

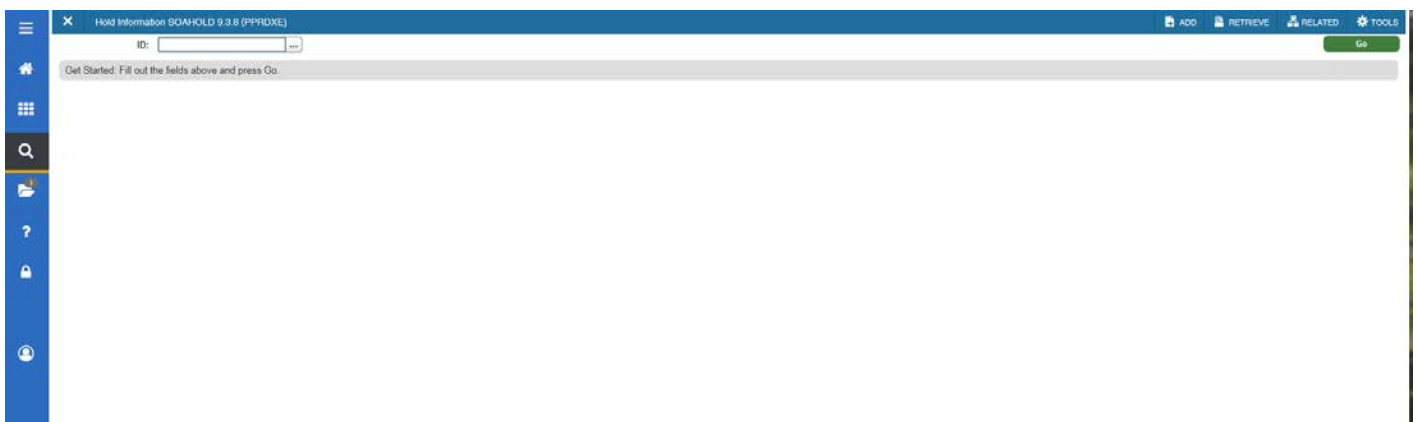
Page	Page Name	Description
SOAHOLD	Hold Information	Assign and remove holds for a student record

PROCEDURES

HOW TO ASSIGN A HOLD MANUALLY

STEPS

1. Go to **SOAHOLD** – the page contains all department and advising student holds EXCEPT for Financial Aid holds.
2. Input SID, press Go, and go to a blank row or click Insert to add a blank row.



3. Type in the **Hold Type Code**.
 - a. If you do not know the **Hold Type** code, select the **lookup function** 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** defines what the hold will actually hold or prevent. 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).

Hold Type Codes (STVHLDD)

Criteria

Code	Desc	Reg Hold	Env Hold	Trans Hold	Grad
AD	Discontinuation from Major	Y			
AG	Upper Division GPA < 2.0	Y			
AL	Life Science Core Agreement	Y			
AM	Check progress in Major	Y			
AN	Pursuing non-CHASS major	Y			
AO	Advising for HOF Waiver	Y			
AP	Academic Probation	Y			
AR	PreBusiness Student Progress	Y			
AS	Academic Probation (PreBus)	Y			
AI	Undeclared Student Progress	Y			

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Cancel OK

- 1. Note: 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.

AZ	Meet with Advisor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
B0	Contact Main Cashiers Office	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
B1	Delinquent Acct Reg Hold	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	<input type="checkbox"/>
B2	Contact SBS Office	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	<input type="checkbox"/>
B3	Pending Collections	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	<input type="checkbox"/>
B4	Ln Ext Rptd - Conv - Don't use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
B5	Delinquent Loan	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	99	<input type="checkbox"/>

- 2. **Tip:** Use the search feature at the top to locate your hold. For example, if you type “major” all of the descriptions with the word major in them will display:

Hold Type Codes (STVHLDD)

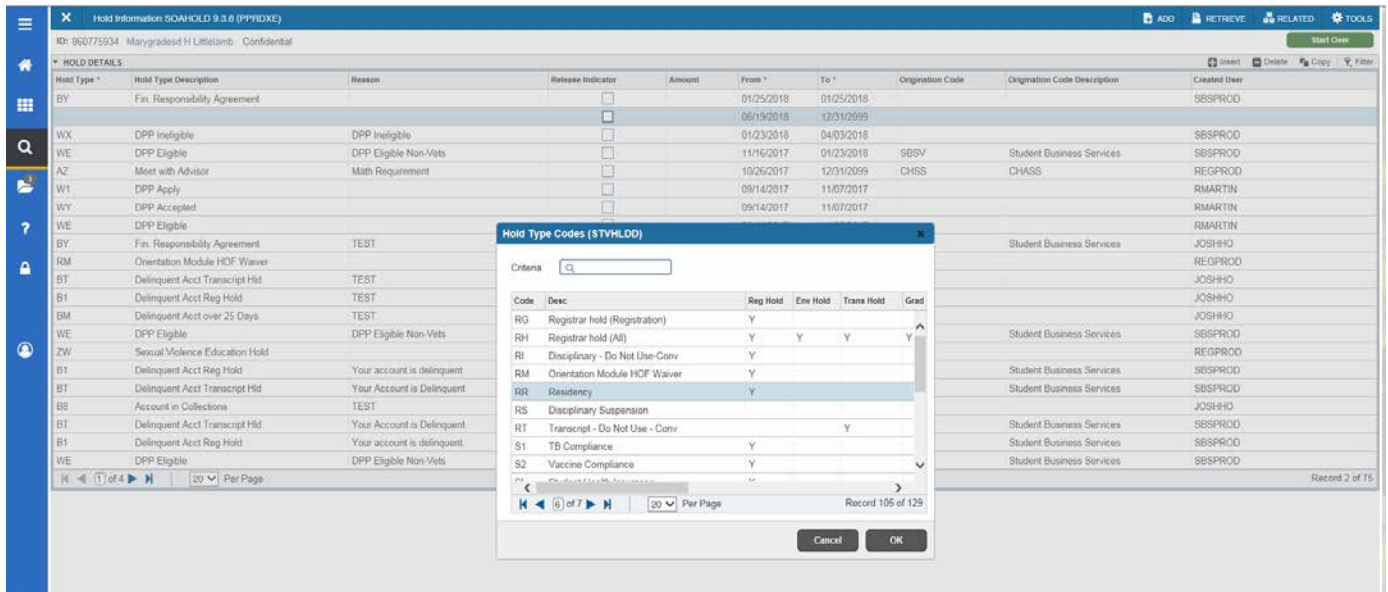
Criteria

Code	Desc	Reg Hold	Env Hold	Trans Hold	Grad
AD	Discontinuation from Major	Y			
AM	Check progress in Major	Y			
AN	Pursuing non-CHASS major	Y			
ED	Must Declare a Major	Y			
EN	Annual Major Advising	Y			
N7	Must choose Major by 90 Units				
NH	Change of Major Required	Y			
NN	Double Major Not Allowed	Y			
NU	Declare A Major To Register	Y			

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Cancel OK

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

*If you are in the Colleges, please place notes associated with your advising holds in the Student Profile with all other advising notes (not in SPACMNT).

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 Information Technology Solutions (ITS) via a ticket.

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 able to see that they have a hold in R’Web areas like registration and the student profile. These places 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.

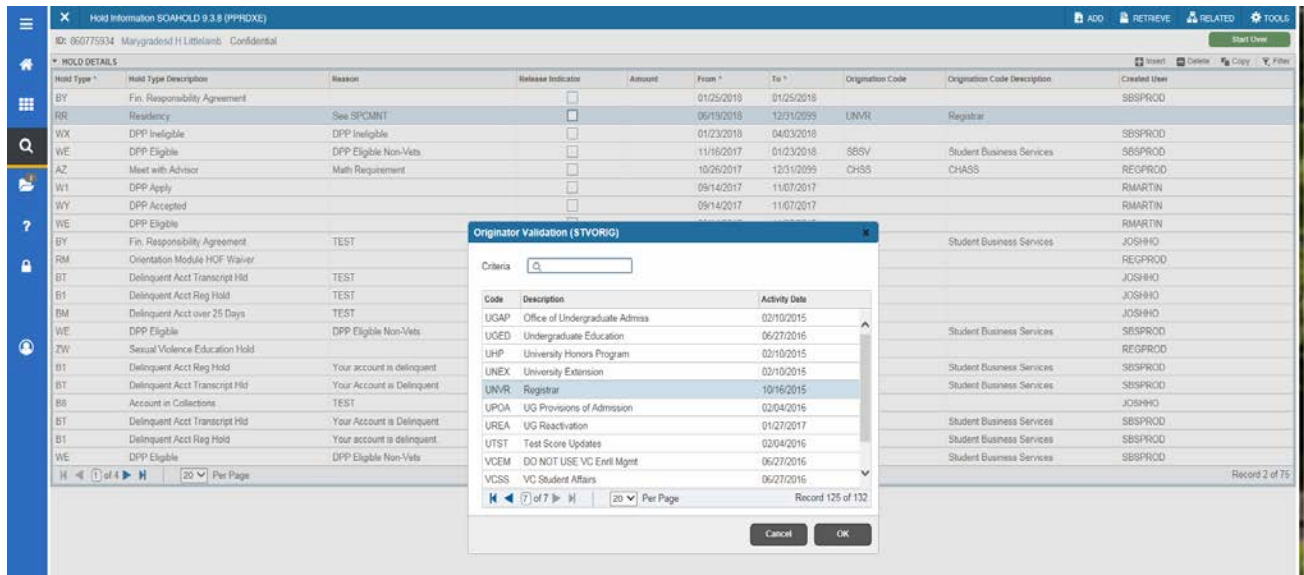
- Please note that holds in Banner are date based and not term based. Once a hold is effective it will hold the designated process regardless of term. For example, if you place a hold which holds registration it will hold registration adjustments for all terms, not just for a future term that is about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

Date Grid	
Main term you want to hold for	Date hold should be effective
Winter 2019	25-Oct-18
Spring 2019	31-Jan-19
Fall 2019	10-May-19

**** NOTE:** If you are placing a hold to impact Summer Session registration -- Due to the timing of the start of Summer Session registration (early April) the hold will also impact adjustments a student may want to do during drop/add of spring quarter and who plan to enroll in fall.

- 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. If you do not know the **Origination Code**, select the **lookup function** next to it and it will open **STVORIG**.
 - i. STVORIG is the validation table that lists all the departments/programs.



- c. Select your department/program that is associated with the hold you are assigning and press **OK**.
 - d. Staff who have access to **SOAHOLD** will see the **NET ID** of the person who placed the hold in the **Created User** field.
7. Press **SAVE**.

HOW TO RELEASE A HOLD

STEPS

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, if you want to release the hold immediately, press the **"T"** key followed by **"TAB"** and the current date will default.
 - 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**. The hold is now released.

FINAL QUIZ

1. All holds are found on SOAHOLD.
 - a. Answer: FALSE, all department and advising student holds EXCEPT for Financial Aid specific holds are found on SOAHOLD.
2. Students will be able to view their holds, to include a long description and how to resolve the hold in R'Web.
 - a. Answer: TRUE
3. If you add a registration hold that has a From Date of 28-Jan-2017 it will only hold registration activity in Spring 2017.
 - a. FALSE, since many holds are intended to prevent students from registering, it is recommended that you use an effective date in line with when the Schedule of Classes becomes available online for the term, BUT holds in Banner are date based not term based. Once a hold is effective it will hold the designated process regardless of term.
4. If the hold you are reviewing has a From Date of today and a To Date of 12/31/2099, what does that tell you?
 - a. A) The hold is currently active.
 - b. B) The hold is active until the "end of time".
 - c. C) The hold is no longer active.
 - d. D) Both A and B
 - e. Answer: D
5. If a department wants to place a financial hold on their account they should request for a new code.
 - a. Answer: FALSE, departments requesting a financial hold on a student account must work through Student Business Services (SBS).