This learning guide is based upon SunGard Higher Education Banner documentation. This document is for use at Stephen F. Austin State University for the purpose of training; the information contained is considered confidential.

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Office of the Registrar

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# Session Overview

## Introduction
To provide the basis that will allow end users to perform functions in the Banner Student System that are part of their day-to-day responsibilities.

## Prerequisites
The following are prerequisites for completing this session:
- Navigation Training

## Expected Outcomes
At the end of this session, participants will be able to:
- View, Place, and Remove Holds on a Student Record

## Learning Guide Icons

*In this Banner learning guide watch for these icons to highlight important information.*

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🚨</td>
<td>Indicates an important trap to avoid.</td>
</tr>
<tr>
<td>🔄</td>
<td>Indicates an important warning regarding the form or data entry.</td>
</tr>
<tr>
<td>📖</td>
<td>Indicates a shortcut or tip.</td>
</tr>
<tr>
<td>🏈</td>
<td>Indicates hands-on exercise or activity.</td>
</tr>
</tbody>
</table>
For those with full access to place, waive and remove holds.

**Viewing Hold Information**

On the SOAHOLD form, you can view the various holds on a student’s record. To do so:

- enter the student’s ID number in the ‘ID’ field
- click the green “Go” button to populate data
- you can use the up and down arrow keys on your keyboard to navigate between hold records

Under ‘Hold Details’, an explanation of each hold will be displayed in the ‘Hold Type Description’ column. The owner of the hold can be viewed here under ‘Origination Code’ or ‘Origination Code Description’. To determine if a hold is active, refer to the ‘From’ and ‘To’ dates.
Placing Holds

1. Use the down arrow key on your keyboard to navigate past all current holds to create a blank record. A blank field will appear under the ‘Hold Type’ column. Type in the Hold Type Code or click the List of Values (LOV) Button to pull up a list of available Hold Types to choose from. (You will only be able to place or alter holds that apply to your specific department. By scrolling to the right you will be able to see what processes the holds affect. Ex: Registration and/or Transcript Hold.)

2. Type in the ‘Reason’. This is a free form field limited to 30 characters. Keep in mind that information entered in the “Reason” field can be viewed by students through their MySFA accounts. (Ex: Missing HS Transcript; Owes for Previous Balance; etc.) For narratives longer than 30 characters, you may want to add a SPACMNT comment.)

3. ‘Amount’ field is not used.

4. Enter the dates during which the hold should be active into the ‘From’ and ‘To’ date fields. Students will not be able to SEE the hold until the ‘From’ date. The ‘To’ date is the last day the hold will be effective.

5. Enter your department’s ‘Origination Code’. If this is not coded, students cannot see who to contact when checking their holds online.

6. Save your changes by clicking ‘Save’ in the lower right-hand corner.

Students can view their holds and reasons for the hold through their mySFA account.
Remember!! To place a hold you MUST enter a Hold Type, your Origination Code, and you MUST click ‘Save.’

Waiving and Moving Holds

Remember!!! Holds can be released or moved by anyone who has access within your department.

To release your department’s hold and move it to a future term, change the ‘FROM’ date to reflect a date just prior to the next registration period.

(Ex. - if it is March/April and we are registering for Fall, waive until the day after ORD of the next semester. At that time, the next upcoming Registration period will be for the upcoming Spring term. If it is October and we are registering for Spring, waive until the day after ORD of the next semester. At that time, Registration will be active for the upcoming Fall term.)

The Registrar’s office sends out an email to departments with the upcoming suggested “move-to” date to prevent future early registration.

You can type over the date or click on the calendar and select a date from the drop-down menu.
Removing Holds

If a hold from your department has been satisfied and no longer needs to be displayed, you can delete the hold. To do so:

- Select (highlight) the specific hold
- Click ‘Delete’
- Save your changes.

<table>
<thead>
<tr>
<th>Hold Type</th>
<th>Hold Type Description</th>
<th>Reason</th>
<th>Amount</th>
<th>Force *</th>
<th>To *</th>
<th>Origination Code</th>
<th>Origination Code Description</th>
<th>Created User</th>
</tr>
</thead>
<tbody>
<tr>
<td>EA</td>
<td>COMM - Advising Hold</td>
<td>Academics Advising Hold</td>
<td>02/24/2017</td>
<td>12/31/2019</td>
<td></td>
<td>COMM</td>
<td>Mass Communication</td>
<td>SPARS2Q9ED1</td>
</tr>
<tr>
<td>BR</td>
<td>A/R Hold - Registration</td>
<td>A/R - Matriculation/Charge</td>
<td>10/10/2016</td>
<td>07/21/2016</td>
<td></td>
<td>Bursar/Business Office</td>
<td>Matriculation Charge_Prof</td>
<td>SPARS2Q9ED1</td>
</tr>
<tr>
<td>BI</td>
<td>A/R Hold - Transcript</td>
<td>A/R - Matriculation/Charge</td>
<td>07/16/2016</td>
<td>07/21/2016</td>
<td></td>
<td>Bursar/Business Office</td>
<td>Matriculation Charge_Prof</td>
<td>SPARS2Q9ED1</td>
</tr>
</tbody>
</table>

NOTES: ____________________________

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Students are able to view holds through their MySFA accounts. Note that everything on SOAHOLD can be viewed by the student, so care should be taken when making notes on the account. Additionally, only **currently active** holds are shown.

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