

STEPHEN F. AUSTIN STATE UNIVERSITY

A graphic of a white banner with a black outline, featuring a central rectangular section and two pointed ends on either side, resembling a ribbon or scroll.

Banner 9

Student

HOLDS

Revised January 10, 2019

Confidential Business Information

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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HOLDS

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OVERVIEW	Section A
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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.



Indicates an important trap to avoid.



Indicates a shortcut or tip.



Indicates an important **warning** regarding the form or data entry.



Indicates hands-on exercise or activity.

HOLD DETAILS – SOAHOLD	Section B
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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 "Go" button to populate data or Alt+PgDn
- 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.

Hold Information SOAHOLD 9.3.2 (TEST8)									
ADD RETRIEVE RELATED TOOLS									
ID: 12345678 Student Name Here								Start Over	
HOLD DETAILS Insert Delete Copy Filter									
Hold Type *	Hold Type Description	Reason	Amount	From *	To *	Origination Code	Origination Code Description	Created User	
BA	A/R Outstanding Bal-Trans	A/R Outstanding balance due	0.00	11/13/2014	06/14/2016	BUR	Bursar/Business Office	END_HOLD_PGRM	
BB	A/R Outstanding Bal-Registr	A/R Outstanding balance due	0.00	11/13/2014	06/14/2016	BUR	Bursar/Business Office	END_HOLD_PGRM	
3A	ART - Advising Hold	Academic Advising Hold		09/16/2013	12/31/2099	ART	School of Art	SFABATCH004	
D6	6 Drops Remaining	State Drop Limit		08/13/2010	12/31/2099	REGS	Registrar's Office	SZKDLMT Registration process	
Record 1 of 4									
Activity Date 11/13/2014 05:00:27 AM								SAVE	
EDIT	Record: 1/4	SPRHOLD.SPRHOLD_HLDD_CODE [1]					ellucian		

Placing Holds

1. You can use the 'Insert' button at the top right corner to create a blank record or use the F6 key. A blank row will appear and your selected field will be under the 'Hold Type' column. You can also use the arrow keys to navigate through all the records and create a new row at the bottom. Type in the Hold Type Code or click the List of Values (LOV) Button (three dots) 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.)

The screenshot shows the 'Hold Information SOAHOLD 9.3.2 (TESTB)' application. The main window displays a table with the following data:

Hold Type *	Hold Type Description	Reason
BA	A/R Outstanding Bal-Trans	A/R Outstanding
BB	A/R Outstanding Bal-Registr	A/R Outstanding
3A	ART - Advising Hold	Academic Advisi
D6	6 Drops Remaining	State Drop Limit
	RO-Bad Address	

The 'Hold Type Codes (STVHLDD)' modal window is open, showing a list of hold codes and descriptions:

Code	Desc	Reg Hold	Env Hold	Trans Hold	Grad
10	College of BUS Hold	Y			
11	College of BUS Degree Plan	Y			
12	College of BUS Suspension Hold	Y			
13	College of BUS Probation Hold	Y			
14	Must Declare Major See Advisor	Y			
15	College of BUS Advising Hold	Y			
1A	ACCT - Advising Hold	Y			
1B	CSCI - Advising Hold	Y			
1C	ECFI - Advising Hold	Y			

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 or the F10 key.

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.

Hold Type *	Hold Type Description	Reason	Amount	From *	To *	Origination Code	Origination Code Description	Created User
5A	COMM - Advising Hold	Academic Advising Hold		02/24/2017	12/31/2099	COMM	Mass Communication	SFATRIGGER001
BD	A/R - Financial Agreement	A/R - Financial Agreement		11/08/2016	11/13/2016	BUR	Bursar/Business Office	SFATRIGGER001
BR	A/R Hold - Registration	AR_Matriculation_Charge		07/18/2016	07/21/2016	BUR	Bursar/Business Office	Matriculation_Charge_PGPRM
BT	A/R Hold - Transcript	AR_Matriculation_Charge		07/18/2016	07/21/2016	BUR	Bursar/Business Office	Matriculation_Charge_PGPRM
BD	A/R - Financial Agreement	A/R - Financial Agreement		10/23/2015	11/09/2015	BUR	Bursar/Business Office	ITS
BD	A/R - Financial Agreement	A/R - Financial Agreement		04/15/2015	04/16/2015	BUR	Bursar/Business Office	ITS
BF	A/R - FRTP Election Hold	Fixed Rate Tuition Plan		05/15/2014	07/10/2014	BUR	Bursar/Business Office	SFA_BF_HOLD
RB	RO-Bad Address	No Address on File		02/09/2017	12/31/2099	REGS	Registrar's Office	SMITHML10

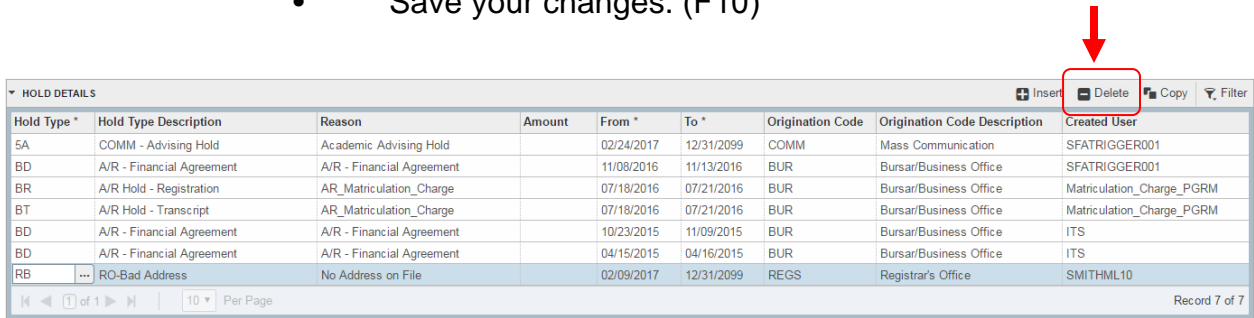
Activity Date: 02/09/2017 11:58:29 AM Activity User: SMITHML10

SAVE

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' or SHIFT+F6
- Save your changes. (F10)



The screenshot shows a table titled 'HOLD DETAILS' with columns: Hold Type *, Hold Type Description, Reason, Amount, From *, To *, Origination Code, Origination Code Description, and Created User. The table contains 8 rows of hold data. Above the table is a toolbar with buttons for 'Insert', 'Delete', 'Copy', and 'Filter'. A red arrow points to the 'Delete' button, which is also highlighted with a red box.

Hold Type *	Hold Type Description	Reason	Amount	From *	To *	Origination Code	Origination Code Description	Created User
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BD	A/R - Financial Agreement	A/R - Financial Agreement		10/23/2015	11/09/2015	BUR	Bursar/Business Office	ITS
BD	A/R - Financial Agreement	A/R - Financial Agreement		04/15/2015	04/16/2015	BUR	Bursar/Business Office	ITS
RB	RO-Bad Address	No Address on File		02/09/2017	12/31/2099	REGS	Registrar's Office	SMITHML10

NOTES:

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.

The screenshot shows the top navigation bar of the MySFA account with the SFA logo and the text 'STEPHEN F. AUSTIN STATE UNIVERSITY'. Below the navigation bar are tabs for 'Personal Information', 'Student', 'Financial Aid', 'Faculty Services', 'Employee', and 'Travel'. A search bar is present with a 'Go' button. To the right of the search bar are links for 'RETURN TO MENU', 'SITE MAP', 'HELP', and 'EXIT'. The main heading is 'View Holds'. Below this is a warning icon and text: 'Please note that some holds are sensitive and may not display on this page.' Underneath is the section 'Administrative Holds' with a table. The table has columns: 'Hold Type', 'From Date', 'To Date', 'Amount', 'Reason', 'Originator', and 'Processes Affected'. One row is visible: 'ART - Advising Hold Sep 16, 2013 Dec 31, 2099 Academic Advising Hold School of Art Registration'. Below the table is the text 'RELEASE: 8.7.1' and a copyright notice '© 2017 Ellucian Company L.P. and its affiliates.'

Hold Type	From Date	To Date	Amount	Reason	Originator	Processes Affected
ART - Advising Hold	Sep 16, 2013	Dec 31, 2099		Academic Advising Hold	School of Art Registration	

NOTES: _____
