

# HOLDS: SOAHOLD-Hold Information Form

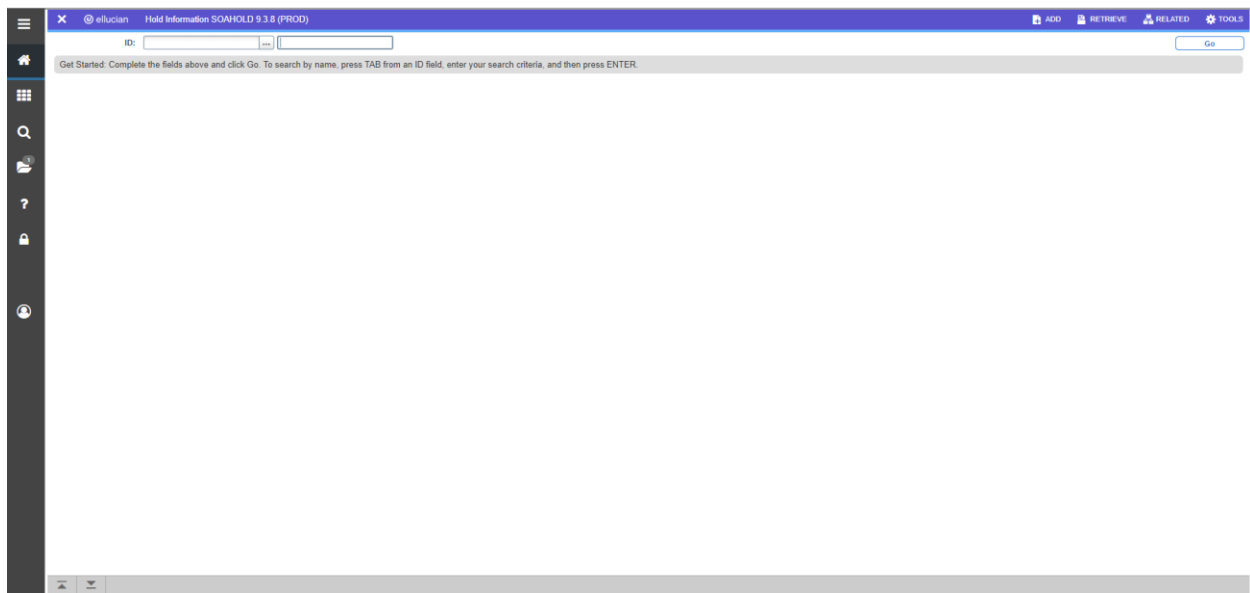
## Objectives

Upon completion of this section, you will be able to:

- Enter a Hold
- Release a Hold

## Description

In Banner, the hold information form, SOAHOLD, is used to assign, track, and remove holds. Holds can prevent students from registering, graduating, obtaining official transcripts, and/or obtaining enrollment verifications.



## ***Enter a Hold***

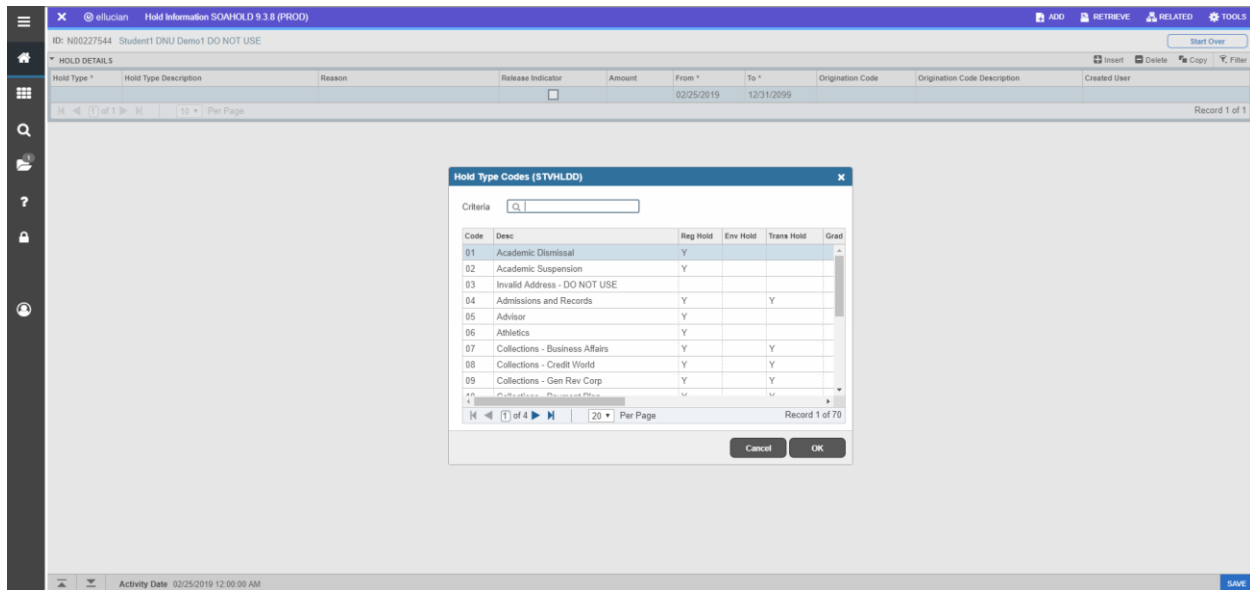
1. From Banner's general menu, type SOAHOLD in the direct access box and press enter.
2. Enter the student in the key block.
3. Next Block (Ctrl+Page Down) to the Holds block or simply use the next block icon.

Hold Type *	Hold Type Description	Reason	Release Indicator	Amount	From *	To *	Origination Code	Origination Code Description	Created User
			<input type="checkbox"/>	10	02/25/2019	12/31/2099			

**Tip!** If there are no blank lines for you to enter a hold, Insert Record (F6). If you want to delete—not release—but completely erase a hold, place your cursor on the record you want to delete and Delete Record (Shift+F6) or click Record in the menu bar and then remove. Holds should only be erased if you made an error. DO NO remove a valid hold!

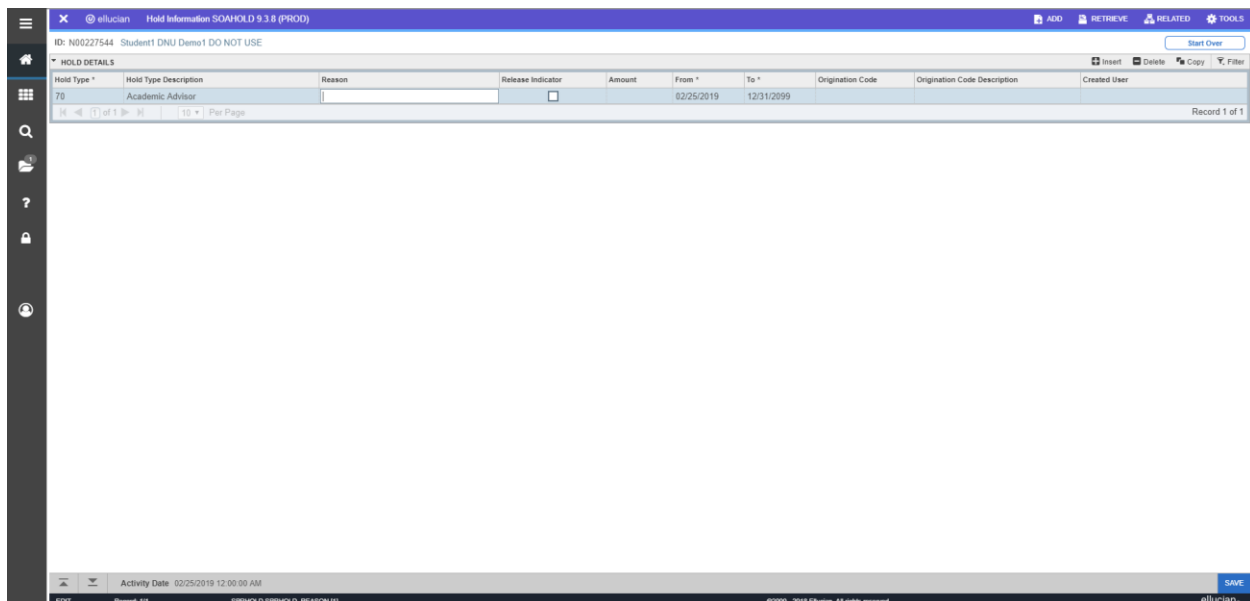
4. With your cursor in the Hold Type field, list (F9).

5. The Person Type Hold Validation (STVHLDD) box pops up. This box lists all the values and indicates what hold types are assigned to each value. If you scroll to the right, you will see which holds prevent the student from registering (Reg), from obtaining enrollment verification (Env), from obtaining an official transcript (Tran), and/or from graduating (Grad).



6. Select (Shift+F3) the hold you want to use.

**Tip!** After you select a hold, your user name populates to the right of the hold. This is how you can tell who entered the hold.



7. The Rel check box is a Release Indicator. Checking the box protects the hold from being released by someone else—only you will be able to release the hold. If you do not check the box, any user will be able to release the hold. In general, you DO NOT want this box to be checked.

8. In the Reason field you may write a brief explanation (30 characters or less) or you may

leave it blank. Use caution, reasons may be seen by others.

9. The date fields populate automatically. The "From" date should be the date you enter the hold, and the "To" date should be 31-DEC-2099.

10. Tab to the Orig (Originator) field.

11. List (F9).

The screenshot shows the 'Hold Information SOAHOLD 9.3.8 (PROD)' interface. The main table displays a hold record with the following details:

Hold Type *	Hold Type Description	Reason	Release Indicator	Amount	From *	To *	Origination Code	Origination Code Description	Created User
78	Academic Advisor	MAJOR CHECKPOINT	<input type="checkbox"/>		02/25/2019	12/31/2099			

An 'Originator Validation (STVORIG)' dialog box is open, displaying a list of originator codes and descriptions:

Code	Description	Activity Date
AA	Academic Affairs	01/05/2011
AC01	Academic Advisor 918-444-2901	09/04/2013
AC02	Academic Advisor 918-444-2913	09/04/2013
AC03	Academic Advisor 918-449-6399	09/14/2015
AC04	Academic Advisor 918-444-3670	10/03/2014
AC05	Academic Advisor 918-444-3671	04/24/2014
AC06	Academic Advisor 918-449-6241	09/04/2013
AC07	Academic Advisor 918-444-3808	09/04/2013
AC08	Academic Advisor 918-444-3825	09/04/2013
AC09	Academic Advisor 918-449-6242	09/04/2013

The dialog box also includes a search criteria field, a 'Criteria' input, and 'Cancel' and 'OK' buttons. The main interface shows the 'Activity Date' as 02/25/2019 12:00:00 AM and the 'Activity User' as GREGGA.

12. Select the originator code that represents your office (DO NOT use an originator that does not match your hold).

13. Save (F10).

The screenshot shows the 'Hold Information SOAHOLD 9.3.8 (PROD)' interface after saving. The main table displays the updated hold record:

Hold Type *	Hold Type Description	Reason	Release Indicator	Amount	From *	To *	Origination Code	Origination Code Description	Created User
70	Academic Advisor	major checkpoint	<input type="checkbox"/>		01/31/2019	01/31/2019	AC01	Academic Advisor 918-444-2901	GREGGA

The 'Activity Date' is now 02/01/2019 09:17:25 AM and the 'Activity User' is GREGGA. The 'Save' button is visible in the bottom right corner.

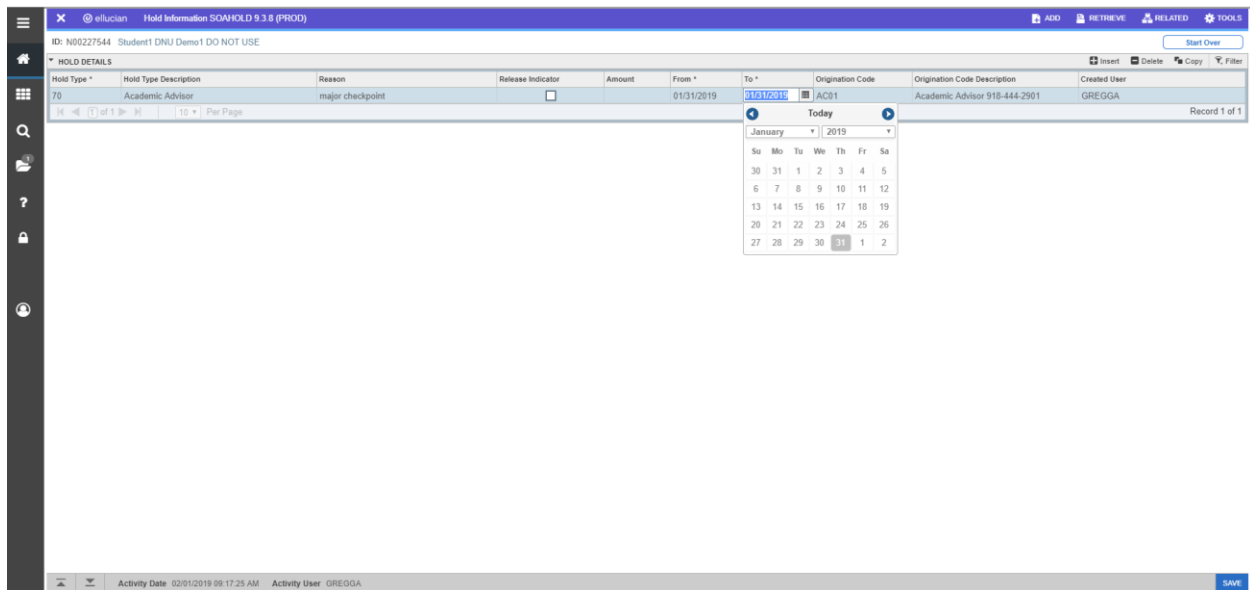
14. Exit (Ctrl+q).

## Release a Hold

### VERY IMPORTANT

- **Holds are placed on students for very important reasons. It is critical that you do not release a hold that was placed on a student by another office.**
- **All holds should remain on the student in order for us to track the history of that hold. DO NOT remove holds...manage them instead.**

1. From Banner's general menu, type SOAHOLD in the direct access box and press enter.
2. In the key block, enter the person for whom you wish to release the hold.



3. Locate the hold you want to release and place your cursor in the "To" field.
4. Change the date to yesterday's date.

**Tip!** There is a 24-hour delay in releasing a hold based on the "To" date. For example, if it is a registration hold and you change the "To" date to the date you are releasing the hold, the student will not be able to register until the next day. This is why it is recommended you use the date prior to the day you are releasing the hold.

5. Save (F10).

6. Exit form (Ctrl + q).