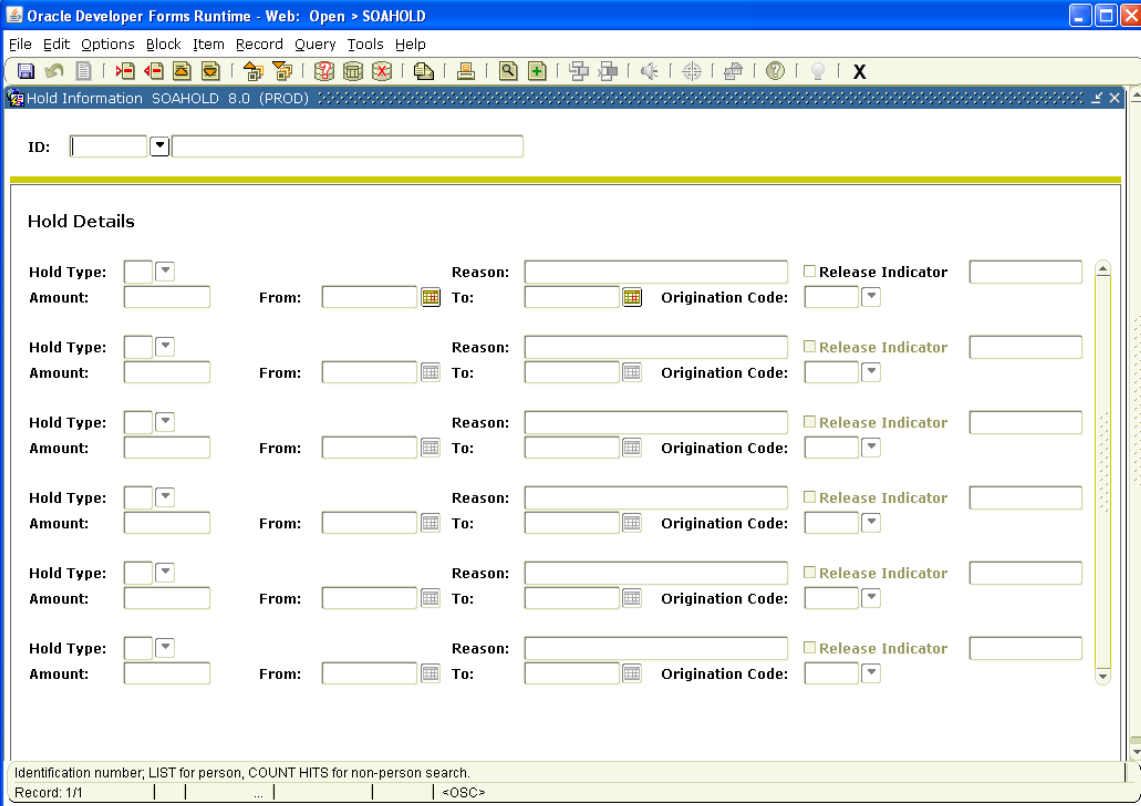## HOLD INFORMATION FORM (SOAHOLD)

Holds must be released **ONLY** by the office or person who placed the hold.
Failure to observe this protocol will result in immediate loss of Banner access.



The Hold Information Form (SOAHOLD) is used to assign, track*, and release holds for a person in Banner.  Holds may prevent registration, graduation, the production of transcripts and/or the production of enrollment verification documents. Holds which affect the Accounts Receivable information may also be specified. Hold information is created by a particular user and should only be changed by that user. Procedurally, each office should determine a user to create and update hold information.

For clarity, a description of each of the fields on this form is provided:

- **Hold Type**: describes the type of hold placed on the student's record
- **Reason**: free-text that provides for additional, although limited, explanation of the hold  (This text can be viewed by the student using Bearcat Web so give careful consideration of the text used.)
- [**Amount**: an amount owed, if applicable (optional). "Amount" is the only field that is optional.  All other fields should have information in them.]
- **From** (date): the date on which the hold is effective
- **To** (date): the date on which the hold is no longer effective

- **Origination Code**: The department which is applying the hold. You may also click the arrow to see a list of available options.
- **Release Indicator**: When this indicator is checked, the release of this hold may be performed only by the originator who entered it. When unchecked, the hold may be released by any user. **Using this indicator is not recommended!** The Banner User ID of the individual who entered the hold will be added to the field beside the Release Indicator   This field is populated by Banner so no input is necessary by the user.

## Releasing a Hold*
Since holds are controlled using effective dates (see descriptions above),
Release a hold by
- Double-clicking in the **To** (date) field,
- Selecting the **Today** button, and
- Saving the change.

Using the above method will not cause the hold to be deleted from the SOAHOLD form - which allows for the tracking of holds.

Do not release a hold by deleting it!

## Assigning a Hold
Enter data in each field on the form (**Amount** is optional) and save; double-clicking in the **Hold Type** field and the **Origination Code** field will return a list of values.  Pay particular attention to the **To** field keeping in mind that this is the date that the hold is no longer effective.

When placing a successive hold for the same or a similar reason as a pre-existing hold, create a new hold (use the **Insert Record** function to create space for the new hold if needed); do not update the old hold.