To Query a Student’s Holds (SOAHOLD)

Instructions assume that user has completed general query training for basic navigation.

1. Access the Hold Information form (SOAHOLD) from the General Menu.
2. In the ID field, enter the BANNER ID of the student.
   - If you do not know the ID of the student, click the Search icon to perform a query,
3. Perform a Next Block.
4. The student’s holds will be displayed.
   - The “From” date is the effective date of the hold.
   - The “To” date determines when the hold is no longer active.
   - Use the scroll bar to the right of the form or the down arrow key to view additional holds.
5. To view another student, click the Rollback icon (or Shift-F7) and repeat steps 2 and 3.
6. To return to the General Menu, click Exit icon (or Ctrl-Q).

To query a specific hold type:
1. Perform steps 1 through 3.
2. Enter query by clicking the Enter Query icon (or F7).
3. Enter the Hold Type to query (double click in the Hold Type field for a list of values) or enter the Origination Code for the office (or both).
4. Execute the query with the Execute Query icon (or F8).
This is what the student sees on SSB on the View Holds menu item under Student Records Menu – To see Financial Aid Holds, they would need to click the link at the bottom or go through the Financial Aid Menu.
Enter the Student ID. Select Block Next.

**Step 1:** Enter the **appropriate Comment Type**. The Comment Type should be 100 for “general” unless it is tied to a hold in which case the Comment Type will be HXX where XX is the Hold Type that the comment matches.

**Step 2:** Enter **Origination Code** for the office of the person creating the comment. Use the drop down arrow to find the proper code. Leave the Contact blank.

**Step 3:** Tab to the Comments section or place your cursor there with the mouse. Type your comments in the Comments box. These should be carefully worded and brief. Offices may want to establish guidelines. These comments can be viewed by all people who have query access to the form. Students do not have access to the information.

**Step 4:** Save.

Notes: The confidentiality box indicates that the comment is confidential but it does not restrict it from view. Do not use the Narrative Comments box at this time.

*There may be other comment types added later. Now the University College will be using this to track the application status of students applying to the college (UCA-active, UCI-inactive, UCP-pending), and the offices setting holds will use to more fully explain the reason for the hold.

**To query a specific Comment Type:**
1. Enter student ID and Next Block.
2. Enter query by clicking the **Enter Query** icon (or F7).
3. Enter the Comment Type to query or enter the Origination Code for the office (or both).
4. Execute the query with the **Execute Query** icon (or **F8**).
5. Rollback to execute another query or “X” out to return to the menu.