

Hold and Restrictions

Overview

The Banner Student Information system has the functionality to restrict student access to College services through the use of Holds and Restrictions. Designated offices at Oakton Community College have been granted the authority to issue holds and restrictions on student records. This procedure outlines the process by which holds and restrictions are placed on the student record and then ended when appropriate.

Hold and Restrictions Overview

When a Hold and Restriction is placed on a student record, the Banner System displays information about the hold which can be viewed directly by the student and Oakton personnel, including Academic Advisors, Department Chairs and Coordinators and other administrative staff. Hold and Restriction information is entered on the [Hold Information \(SOAHOLD\)](#) screen.

The screenshot shows the SOAHOLD form with the following data fields:

Hold Type	Reason	Release Indicator	Amount	From	To	Origination Code
06 Collection Agency Has Account		<input type="checkbox"/> Geeta	.00	06-JUL-2005	31-DEC-2099	0020 Accounting Office
05 Owes Institutional Fees		<input type="checkbox"/> System		17-MAR-2005	31-DEC-2099	0020 Accounting Office

The following data fields are displayed on the [Hold Information \(SOAHOLD\)](#) form.

1. **Hold Type:** The Banner designated code and description for each type of hold and restriction.
2. **Reason:** An optional field in which additional information about the hold and restriction can be entered by the person placing the hold.
3. **Release Indicator:** Unused field. DO NOT check this box when adding a hold and restriction to a student's record. This is followed by the UserID of the person who added the hold and restriction. If the hold is placed by an automated process, System will be displayed in this field.

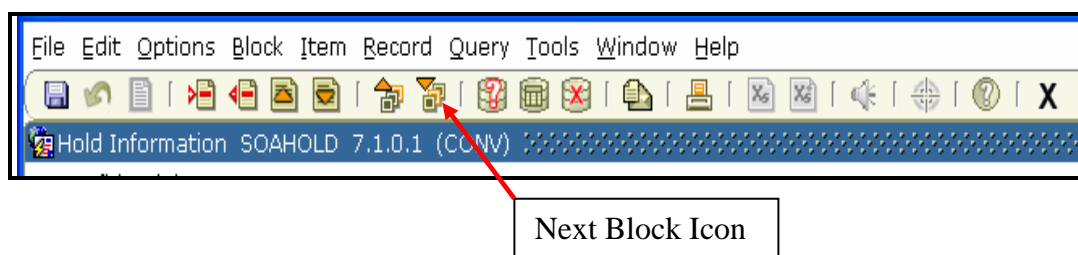
4. **Amount:** An optional field in which a dollar value associated with this specific hold can be entered. This information appears on the Hold Information screen accessible by the student.
5. **From Date:** The date on which the hold and restriction becomes effective. This date is defaulted in with the date on which the hold is placed. This date can be modified by the person entering the hold.
6. **To Date:** The date on which the hold and restriction expires. This date is entered by the person either entering or ending the hold and restriction.
7. **Origination Code:** Each type of hold and restriction is assigned to an Office responsible for the hold.

Hold and Restriction Process

1. Placing a Hold and Restriction

- a. Access the **Hold Information (SOAHOLD)** screen. Enter the student Banner ID number in the ID field of the Key Block or conduct a Student Query from the Key Block.

- b. Select **Next Block** from the Block Menu item or press the **Next Block** icon to access student Hold and Restriction information.



- c. If holds already exist on the student record, they will be displayed in chronological order with the most recent hold displayed first with subsequent holds displayed in date order. Using the mouse, move the cursor to the first open **Hold Type** field.

Confidential
ID: []

Hold Details

Hold Type: 06 [v] Collection Agency Has Account **Reason:** [] **Release Indicator** Geeta

Amount: .00 **From:** 06-JUL-2005 [] **To:** 31-DEC-2099 [] **Origination Code:** 0020 [v] Accounting Office

Hold Type: 05 [v] Owes Institutional Fees **Reason:** [] **Release Indicator** System

Amount: [] **From:** 17-MAR-2005 [] **To:** 31-DEC-2099 [] **Origination Code:** 0020 [v] Accounting Office

- d. The **Hold Type** code can be typed in this field or selected from the Hold Type pull down menu by pressing the Down Arrow in the **Hold Type** field. A separate window will open with a listing of all valid Hold and Restrictions. (A complete listing of all valid Hold Codes and referral information is contained in Addendum A of this procedure.)

Find %

C...	Desc	Reg ...	Env ...	Trans H...	Grad H...	Grade H...	AR Hold
01	Free Form Acctg No Override	Y		Y			
02	Student Has NSF Check	Y		Y			
03	Student Has Unpaid Fine	Y		Y			Y
04	Student Owes Alliance Fees	Y		Y			
05	Owes Institutional Fees	Y		Y			
06	Collection Agency Has Acco...	Y		Y			

- e. Select the appropriate Hold and either double click on the hold or highlight the hold and press the **OK** button at the bottom of the window.
- f. The Hold Information screen will appear with the Hold Type code, Hold Type Description, Hold Issuer ID, Default Hold From Date and Default Hold To Date will be entered.

Hold Details

Hold Type: 06 Collection Agency Has Account Reason: Release Indicator: Geeta
 Amount: .00 From: 06-JUL-2005 To: 31-DEC-2099 Origination Code: 0020 Accounting Office

Hold Type: 05 Owes Institutional Fees Reason: Release Indicator: System
 Amount: From: 17-MAR-2005 To: 31-DEC-2099 Origination Code: 0020 Accounting Office

- g. Optional information, including **Reason**, **Amount** and **Origination Code** may be entered when issuing a Hold or Restriction. The **Reason** field can have a comment or additional information about the hold entered. The **Amount** field can have a dollar amount associated with the issued hold entered. The **Origination Code** indicates the office through which the hold is being placed. The coded can be entered directly or selected from a pull down menu.


Hold Details

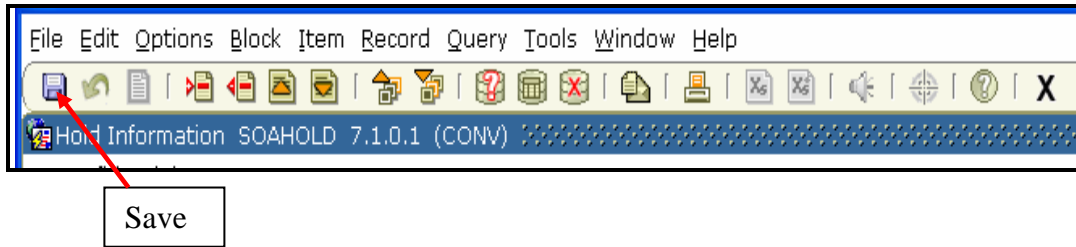
Hold Type: 05 Owes Institutional Fees Reason: Unpaid Parking Tickets Release Indicator:
 Amount: 25.00 From: 06-FEB-2006 To: 31-DEC-2099 Origination Code: 0330 Public Safety Office

- h. The **Origination Code** can be typed in this field or selected from the Origination Code pull down menu by pressing the Down Arrow in the **Origination Code** field. A separate window will open with a listing of all valid origination codes.

0000	Admnetics Office	22-DEC-2004
0070	Bookstore	22-DEC-2004
0080	Business and Finance Office	22-DEC-2004
0090	Business Institute Office	22-DEC-2004
0100	Business Services Office	22-DEC-2004
0110	Career Services Office	22-DEC-2004


Find OK Cancel


- i. Select the appropriate Origination Code and either double click on the hold or highlight the hold and press the  button at the bottom of the window.
- j. The Hold Information screen will appear with the Origination code entered.
- k. Select **Save** from the File Menu item or press the **Save** icon to save the student Hold and Restriction information.



2. Holds and Restrictions issued for a student can be viewed by students and advisors via the Student and Faculty/Advisor Self Service functions.

View Holds

 **Confidential Information for**

 Please note that some holds are sensitive and may not display.

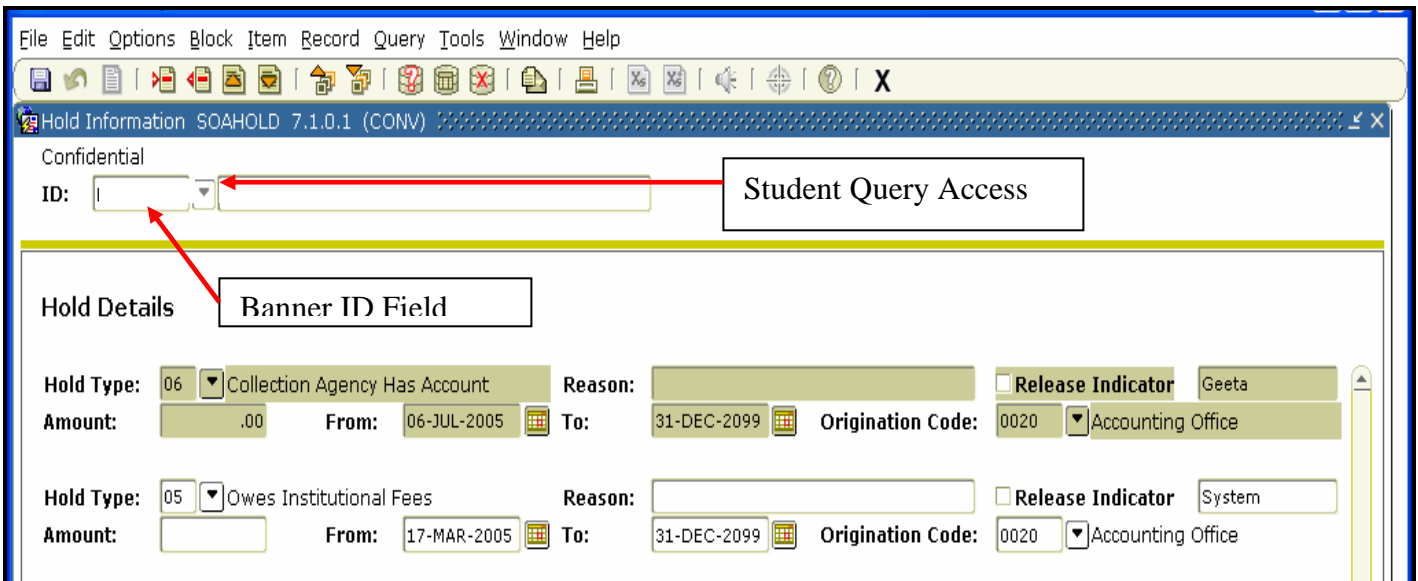
Administrative Holds

Hold Type	From Date	To Date	Amount	Reason	Originator	Processes Affected
Owes Institutional Fees	Mar 17, 2005	Dec 31, 2099			Accounting Office	Registration Transcripts
Collection Agency Has Account	Jul 06, 2005	Dec 31, 2099	\$0.00		Accounting Office	Registration Transcripts

[Return to Previous](#)

3. Releasing a Hold and Restriction

- a. Access the [Hold Information \(SOAHOLD\)](#) screen. Enter the student Banner ID number in the ID field of the Key Block or conduct a Student Query from the Key Block.



File Edit Options Block Item Record Query Tools Window Help

Hold Information SOAHOLD 7.1.0.1 (CONV)

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ID: Student Query Access

Hold Details Banner ID Field

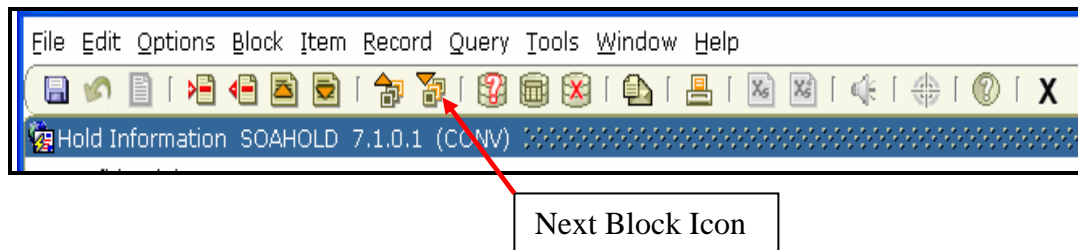
Hold Type: 06 Collection Agency Has Account Reason: Release Indicator Geeta

Amount: From: 06-JUL-2005 To: 31-DEC-2099 Origination Code: 0020 Accounting Office

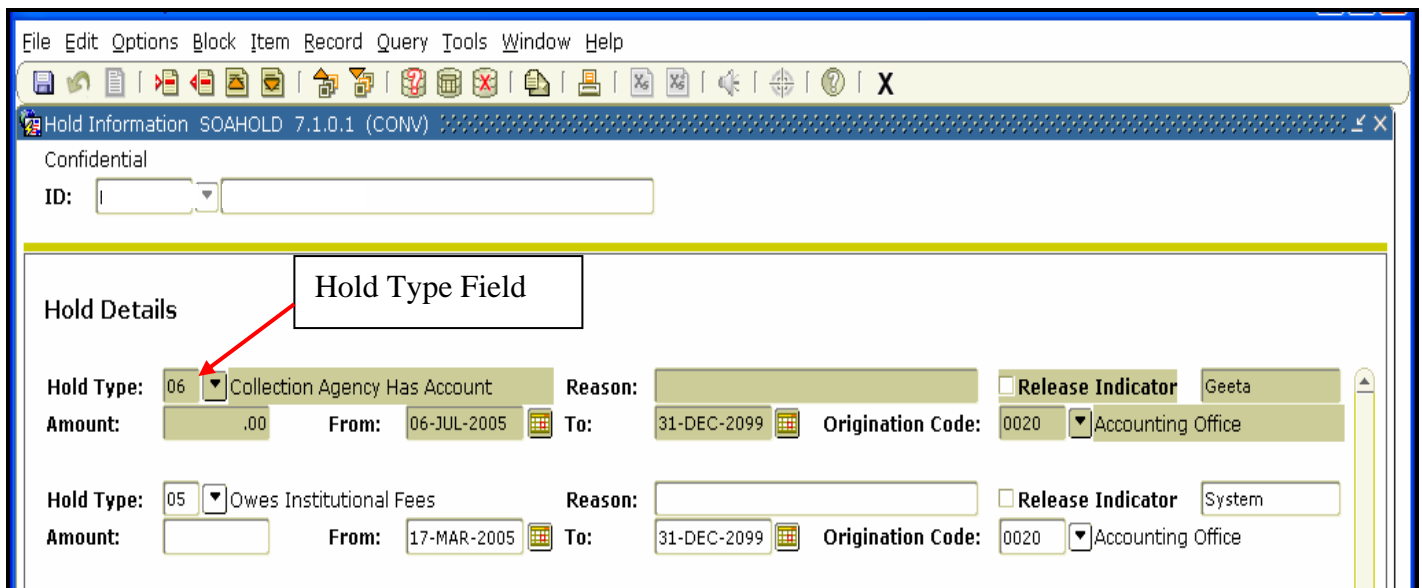
Hold Type: 05 Owes Institutional Fees Reason: Release Indicator System

Amount: From: 17-MAR-2005 To: 31-DEC-2099 Origination Code: 0020 Accounting Office

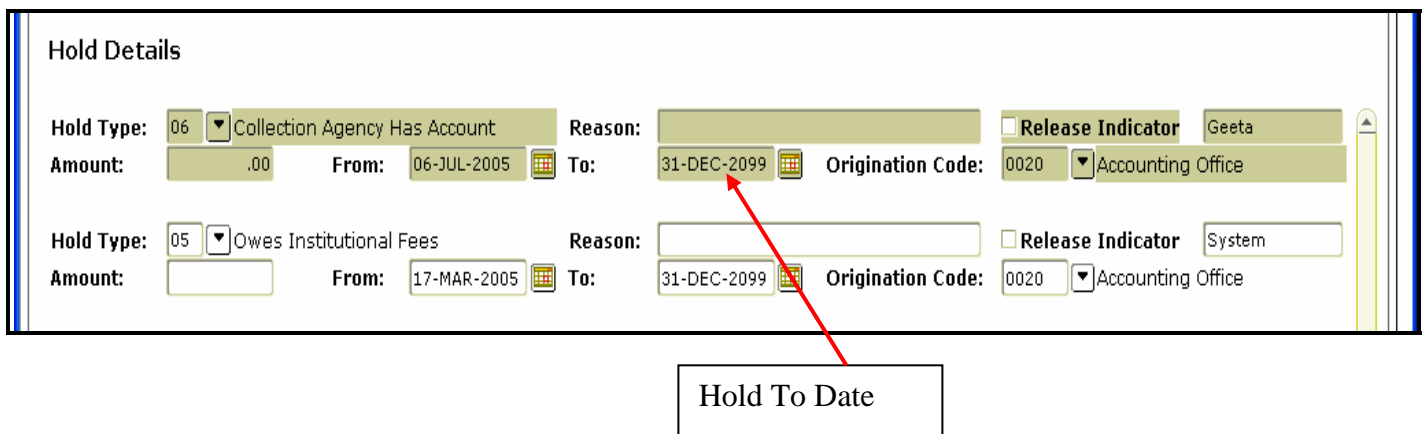
- b. Select **Next Block** from the Block Menu item or press the **Next Block** icon to access student Hold and Restriction information.



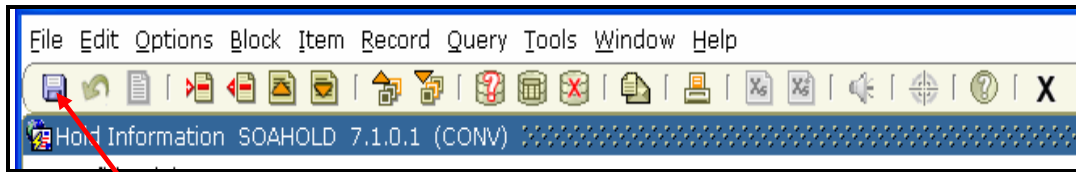
- c. The student record will be displayed with holds listed in chronological order with the most recent hold displayed first with subsequent holds displayed in date order. Using the mouse, move the cursor to the **Hold Type** that is being releases/ended.



- d. To release/end a restriction, use the mouse to move the cursor to the **To Date** field and type in the previous days date in the format DD-MON-YYYY.



- e. Select **Save** from the File Menu item or press the **Save** icon to save the student Hold and Restriction information.



Save

Addendum A

CODE	HOLD TYPE	ACTION
1	Free Form Acctg No Override	Refer student to Cashier
2	Student Has NSF Check	Refer student to Cashier
3	Student Has Unpaid Fine	Refer student to Cashier
4	Student Owes Alliance Fees	Refer student to Alliance
5	Owes Institutional Fees	Refer student to Cashier
6	Collection Agency Has Account	Refer student to Cashier
7	Conversion Balance Due	Refer student to Cashier
11	Must Return Matls to Alt Ed	Refer student to Alternative Education
16	Student is Athlete	-If current athlete override if student will not go below 12 credit hours. -If no longer athlete, refer to Athletics to end hold.
17	Must Return Matls to Athletics	Refer to Athletics
21	F1-No Audit Less than 12 Cr Hr	Override if student will not go below 12 credit hours.
22	F1-Needs Insurance	Refer to Bunny Lynn in Admissions.
23	F1 Summer Only-No Fall	Refer to Admissions
24	Free Form Adm Informational	Refer to Admissions
25	Free Form Adm No Override	Refer to Admissions
26	Free Form Adm Overrideable	Refer to Admissions
27	I-20 Must Enroll in 12 Cr Hrs	Override if student will not go below 12 credit hours.
28	Concurrent HS Student	Refer to Admissions
30	Eng Placement Test Reqd	Refer to Testing Services
31	Math Placement Test Reqd	Refer to Testing Services
32	ESL Tandem 074, 075, 076 Hold	Needs permission from ESL Advisor to register for non-english classes.
33	EGL 092 and 089 Hold	Needs permission from ESL Advisor to register for non-english classes.
41	Overdue Book Loan	Refer to Financial Aid
42	Stafford Loan in Default	Refer to Financial Aid
43	Loan in Preclaim Status	Refer to Financial Aid
44	Robbins Loan Overdue	Refer to Financial Aid
45	See Financial Aid Office	Refer to Financial Aid
46	See Financial Aid Director	Refer to Financial Aid
51	Free Form LC Informational	Refer to Learning Center
52	Free Form LC No Override	Refer to Learning Center
53	Learning Center Restriction	Refer to Learning Center
54	Must See ASSIST Advisor	Refer to Learning Center
55	Must See TRIO Advisor	Refer to Learning Center
61	Owes Library Supplies, Matls	Refer to Library
66	Owes Photo Lab Supplies, Matls	Refer to Photo Lab
71	Addr Discrepancy-Addr Form	Obtain Change of Address form and override
72	Addr Discrepancy-In District	Obtain Proof of Residency and override
73	Addr Discrepancy-Mail Forward	Obtain Proof of address and Override
74	Addr Discrepancy-Out of Distr	Obtain Change of Address form and override
75	Addr Discrepancy-Returned Mail	Obtain Proof of address and Override
76	Free Form R&R Informational	Override based on reason
77	Free Form R&R No Override	Refer student based on reason
78	Free Form R&R Overrideable	Override based on reason
80	Student Has Multiple SSN's	Proof of Valid SS# and override
81	Incomplete Application	Refer to Admissions