

# View, Remove & Apply Holds

## View & Manually Remove Holds

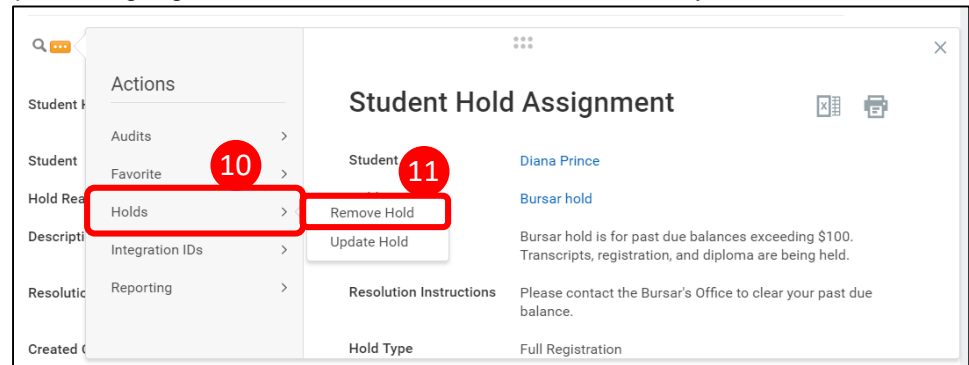
UR Student looks at students' past due balances greater than or equal to \$100 and automatically applies or removes past due balance Holds overnight. You can manually remove a past due balance Hold to give a student the opportunity to do something, for example, register. However, you should advise the student that the past due balance Hold will automatically be reapplied at midnight unless the past due amount has been paid.

1. Type the **Student's name** or **UR ID** in the search bar and press Enter
2. Select **Student** from the Categories list
3. Click **student's name** hyperlink
4. From the student's Summary page, click **More**, if necessary
5. Click **Action Items and Holds**  
*Notice the tabs: Action Items, Active Holds, Resolved Holds*
6. Click the **Active Holds** tab
7. Select the **relevant hold** to be removed
8. Hover over the magnifying glass to view the **Related Actions** icon
9. Click the **Related Actions** icon

10. Hover over **Holds** in the Actions column

11. Select **Remove Hold**

**Note:** In the case of removing Holds to allow the student to register, all Holds preventing registration should be removed in the same way



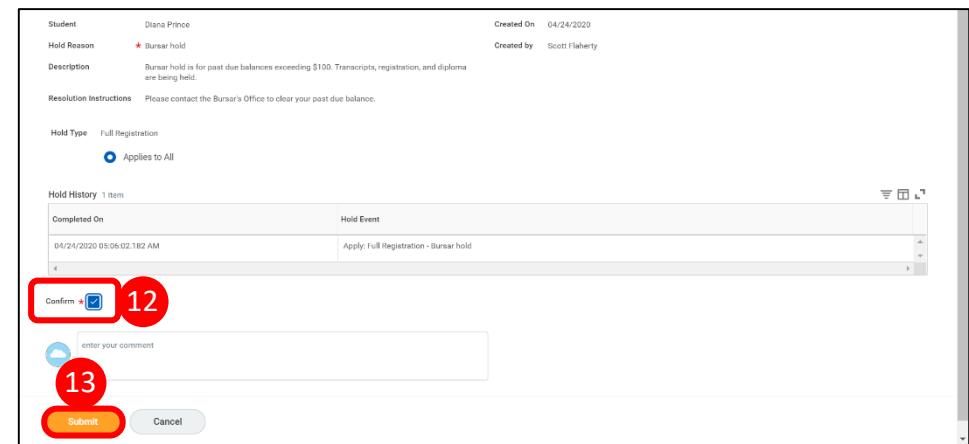
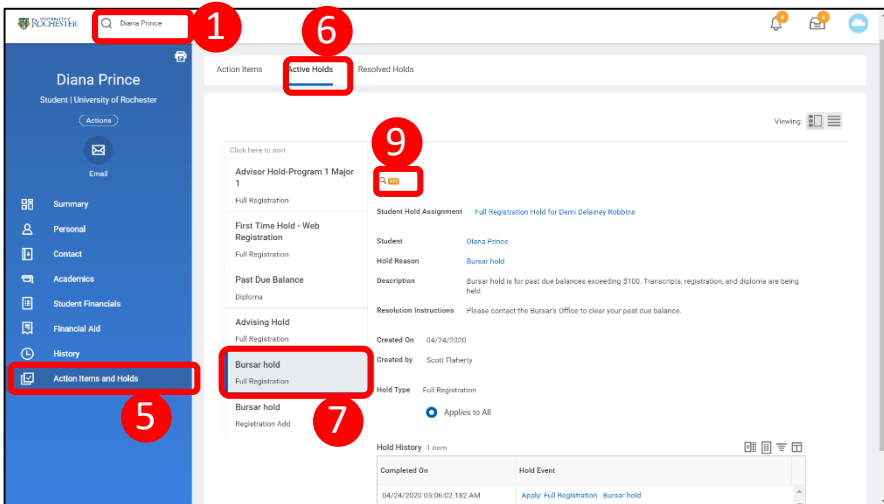
12. Click the **Confirm** checkbox

13. Click **Submit**

14. Review the Details and Process, if desired

15. Click **Done**

**Note:** The Hold will disappear from the Active Holds tab and appear in the Resolved Holds tab on the Student Summary page. The resolved Hold displays information such as who resolved it and when.



# View, Remove & Apply Holds



## Apply Holds

1. Type **Apply Hold** in the search bar
2. Select **Apply Student Hold** from drop-down
3. Type **Student's name** or **UR ID** in Student field and press **Enter**
4. Click **OK**
5. Type **Bursar** in the Hold Reason field and press **Enter**
6. Select the relevant **Hold Reason** from the drop-down  
**Note:** A description of the Hold Reason displays
7. Click the **More** icon in the Hold Type field
8. Select the first **Hold Type**
9. Click **Add**
10. Select the next **Hold Type**
11. Click **Add**  
**Note:** Repeat above until all four hold types are selected (Diploma, Full Registration, Registration Add, Transcript)
12. Click **Submit**
13. Click **Done**

The screenshot shows the 'Apply Student Hold' form with the following elements highlighted by numbered callouts:

- 1:** Search bar containing 'Apply Hold'.
- 5:** 'Hold Reason' field containing 'Bursar hold'.
- 7:** 'Hold Type' dropdown menu showing options: Diploma, Full Registration, Registration Add, and Transcript.
- 8:** 'enter your comment' text input field.
- 12:** 'Submit' button.

Other visible form fields include: Student (Diana Prince), Description (Bursar hold is for past due balances exceeding \$100. Transcripts, registration, and diploma are being held.), and Resolution Instructions (Please contact the Bursar's Office to clear your past due balance.).