Removing Advising Holds

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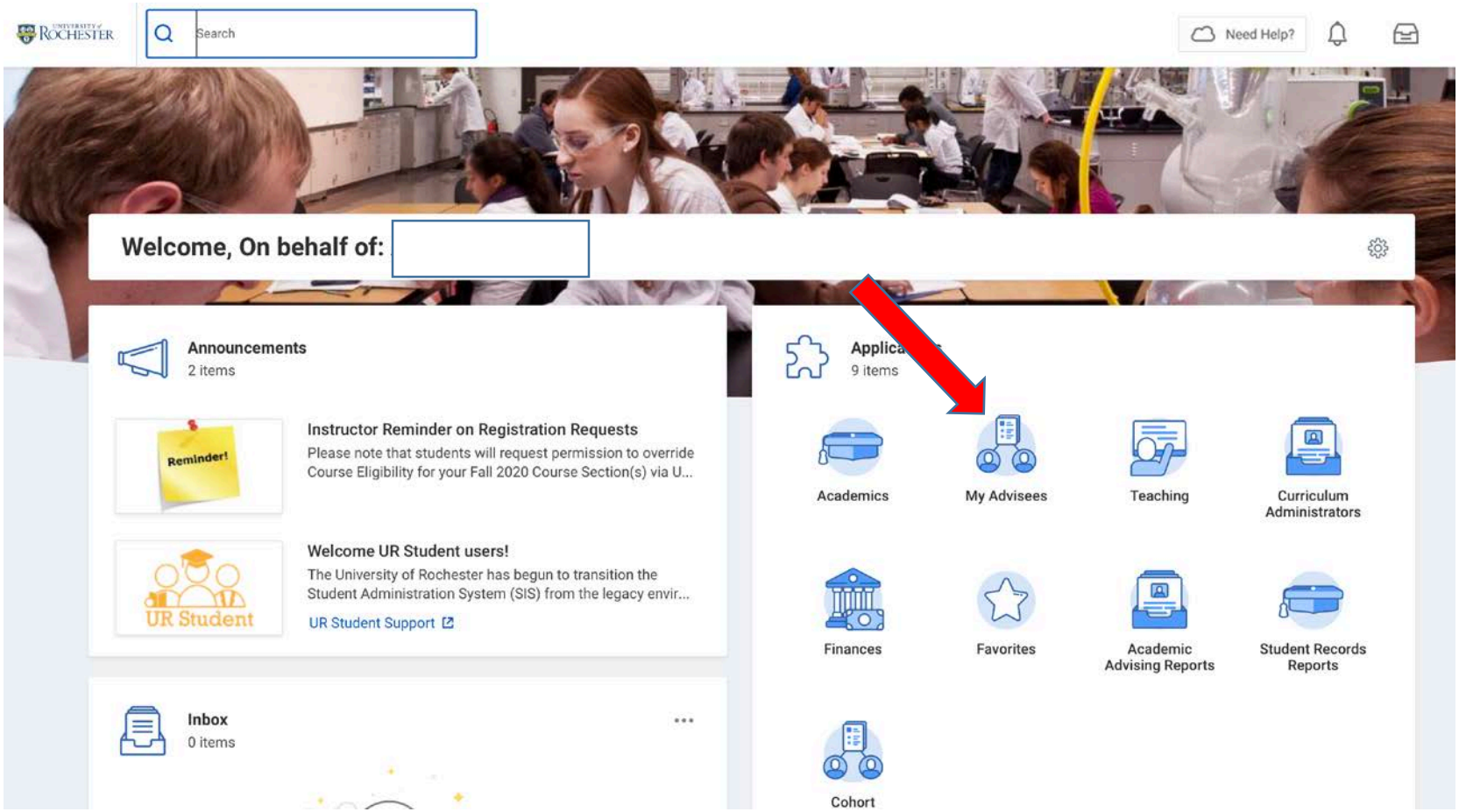
Steps for Removing Advising Holds

- Advising holds must be removed one by one in UR Student by the advisor. It is recommended that advisors remove advising hold as they meet with their advisees during Summer 2020, as opposed to waiting until just before registration to remove all the holds.
  - Go to My Advisee Dashboard
  - Find My Advisees Advising Holds Report
  - Filter for appropriate cohort
    - College Advisor: Last Name
    - Hajim Faculty Advisor
    - Undergraduate Advisor
  - Hover over hold to see related action button (the “twinkie”)
  - Click on related action
    - Choose “Holds” from menu
    - Choose Remove Hold
  - Confirm hold removal and supply comment
  - Submit hold removal request

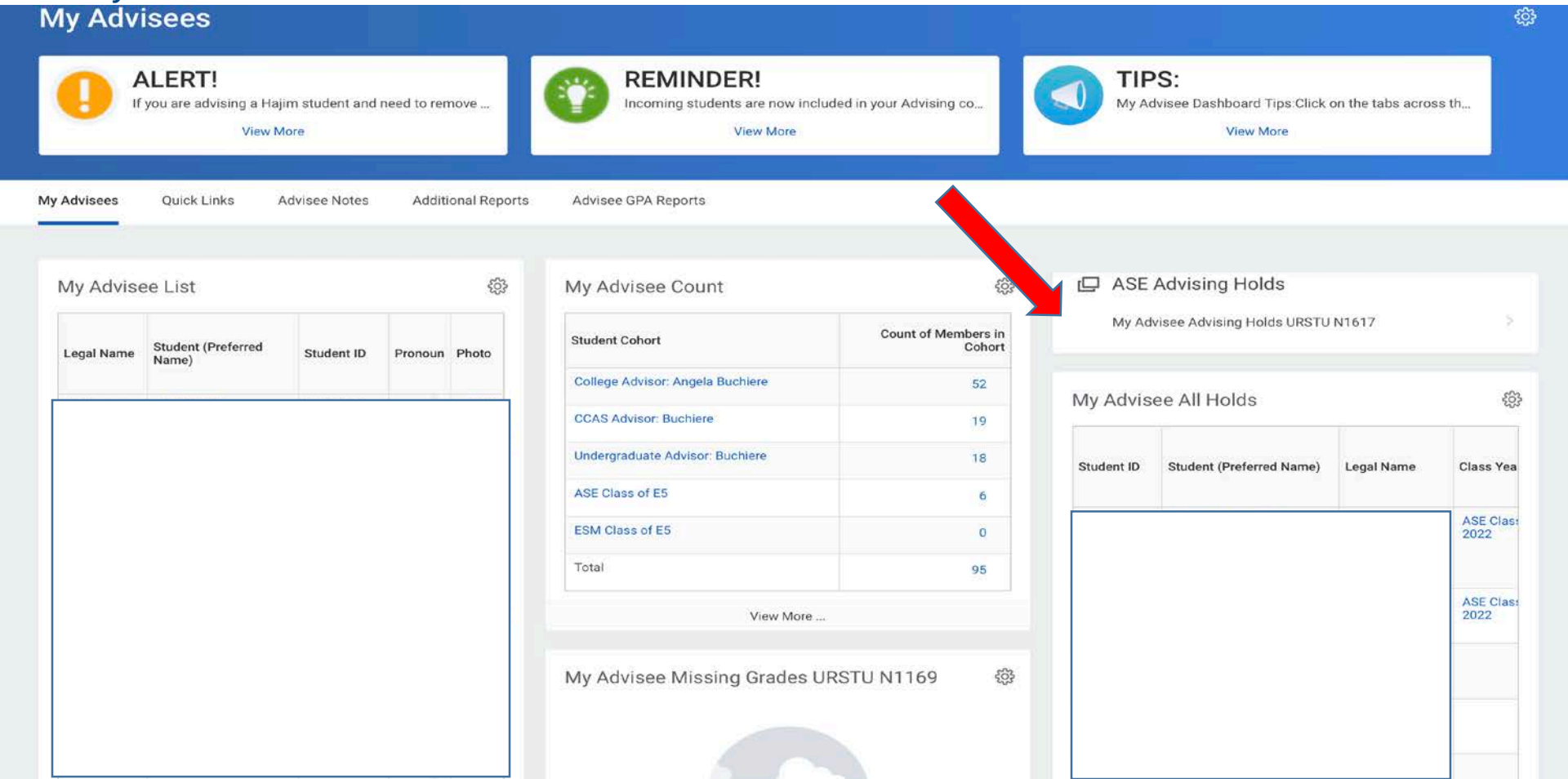
Click on My Advisees Dashboard



Use the Report: My Advisees Advising Holds URSTU N1617 to View and Remove Holds

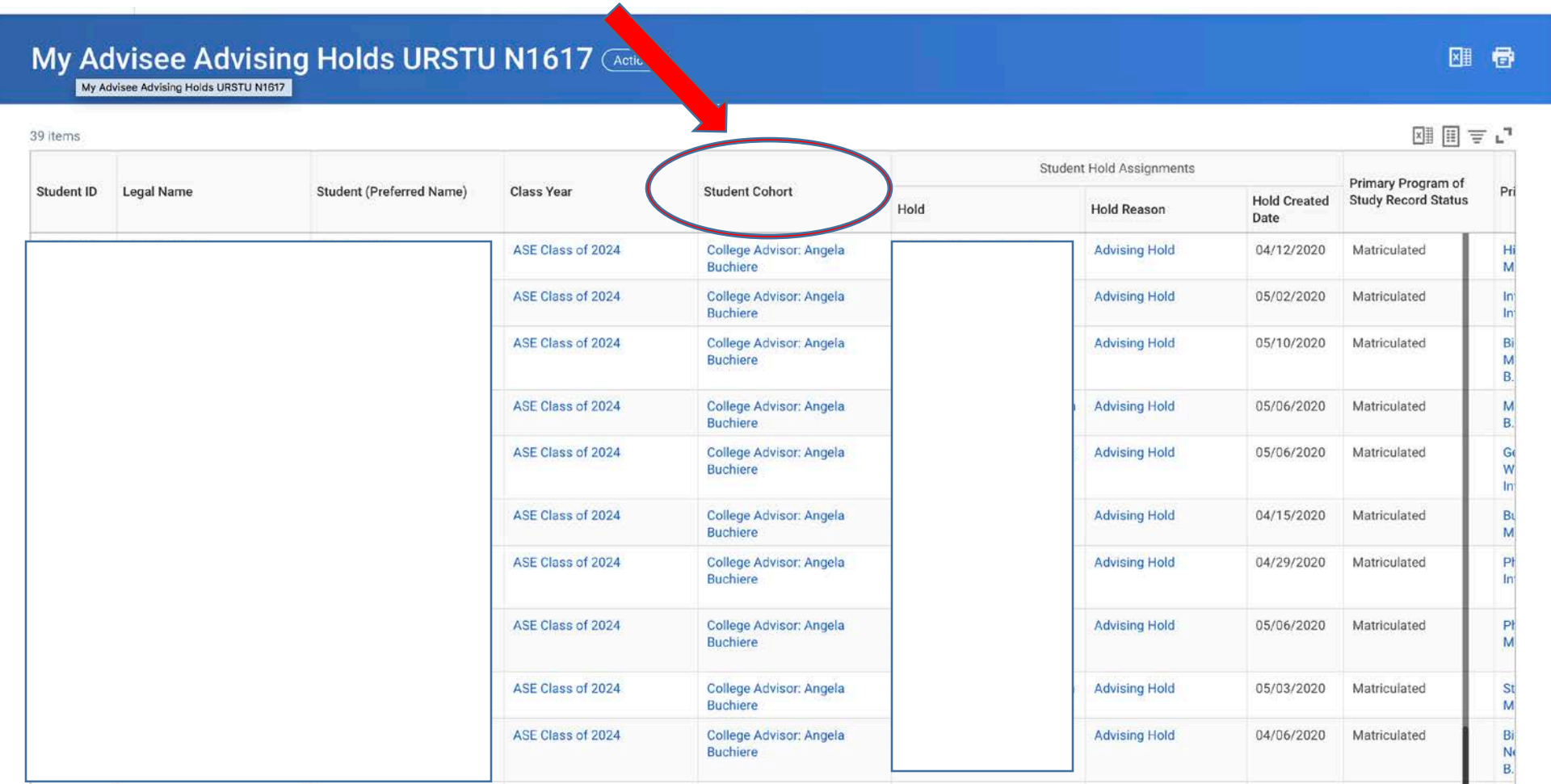
We created this report for you to easily find and remove your advisees' advising holds. The following slides will explain how to filter the report and to remove your advising holds directly from the report.

- Click on "My Advisee Advising Holds URSTU N1617" on the right side of your My Advisees dashboard



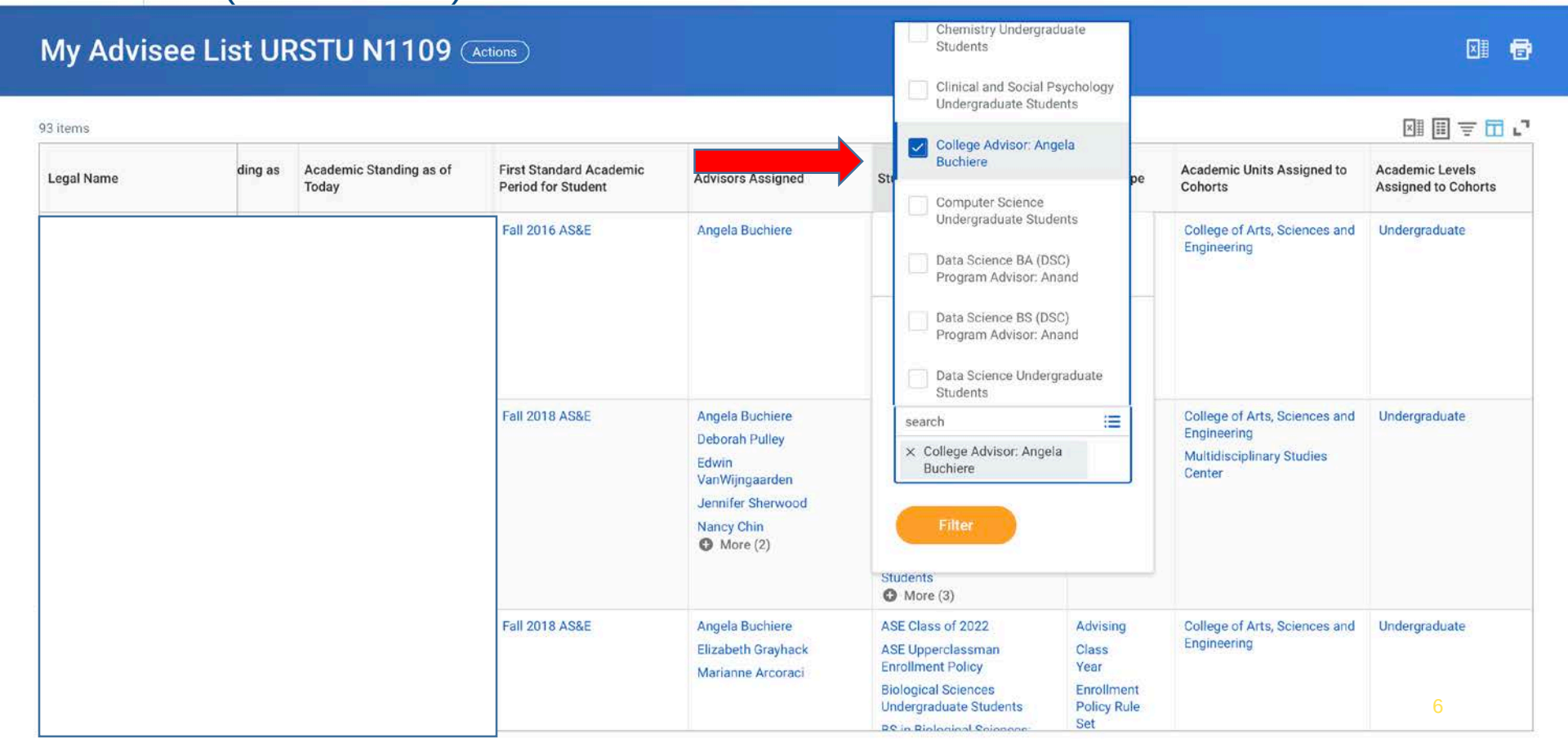
After Report Runs – Filter for Appropriate Cohorts

- Filter on the “Student Cohort” column so that you are only viewing only YOUR College Advisor, Hajim Faculty Advisor, and/or Undergraduate Advisor cohort(s). *(Eastman faculty advisors may not need to filter the report, but should look for the appropriate BM Music Education cohort for their advisees with advising holds.)*



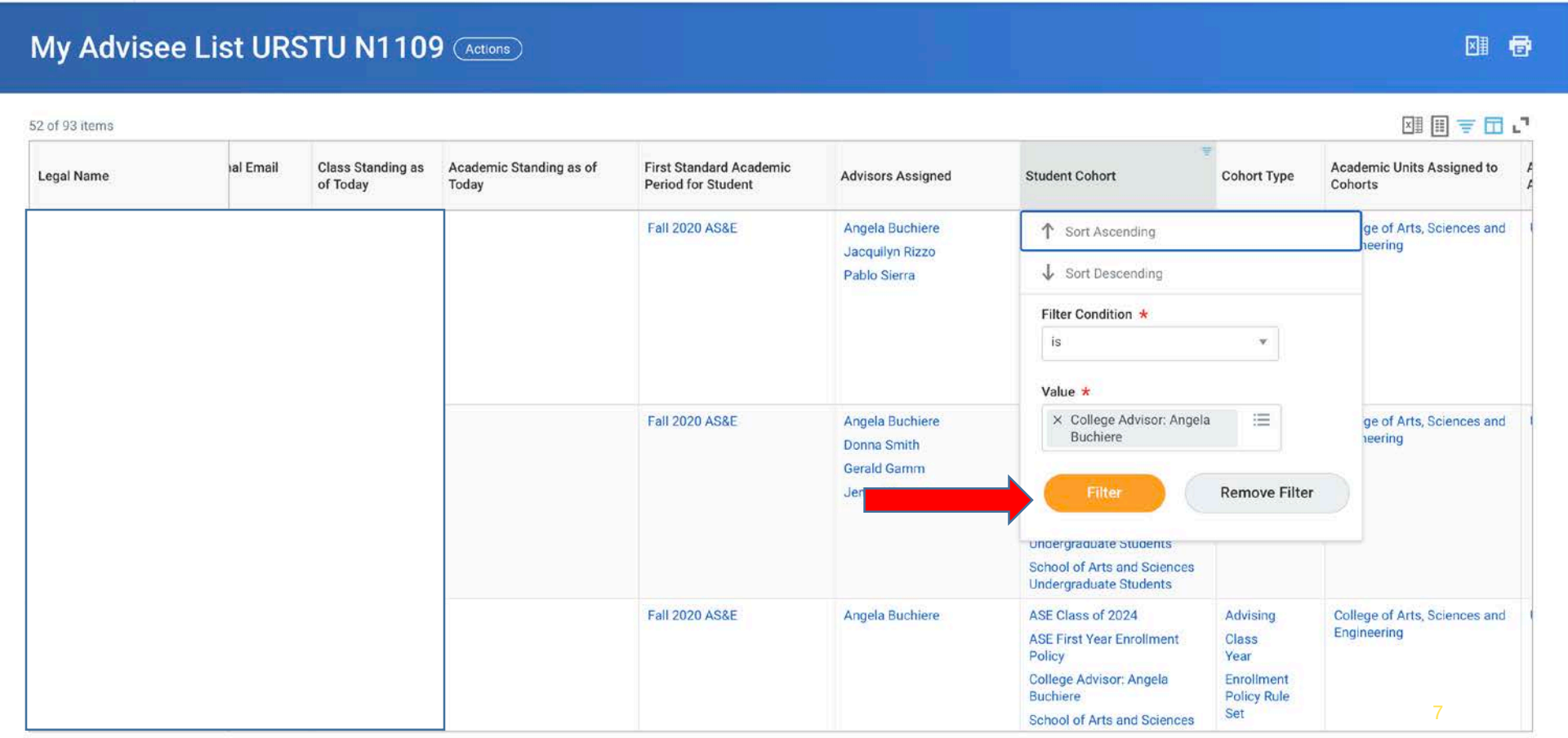
Filtering by clicking on the Student Cohorts column heading

- Scroll right and click on the “Student Cohorts” column heading to bring up the filter menu (see screenshot below)
- Choose the appropriate cohorts for the students whose holds you manage
  - College Advisor: *Last Name and/or* Undergraduate Advisor: *Last Name*
  - Hajim Advisor: *Last Name*
  - (for Eastman) BM Music Education



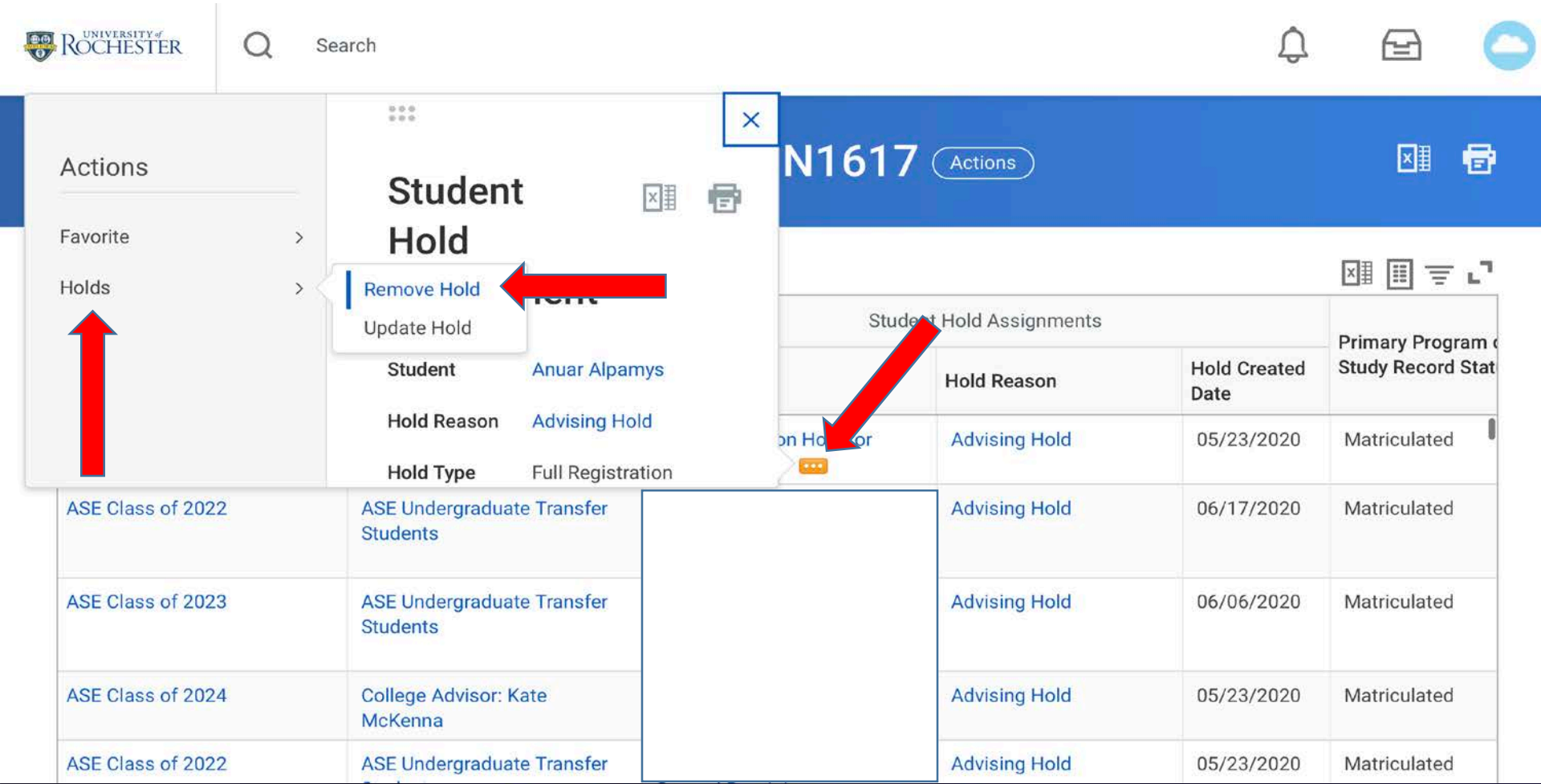
Choose cohorts and click “Filter”

- Once you have selected the appropriate cohort(s), click “Filter” button
- *Remember: Through student cohorts you may be connected to some students for whom a different advisor is responsible for their advising hold. Please be sure to select only your College Advisor, Hajim Advisor or Undergraduate Advisor when you are preparing to manage advising holds*



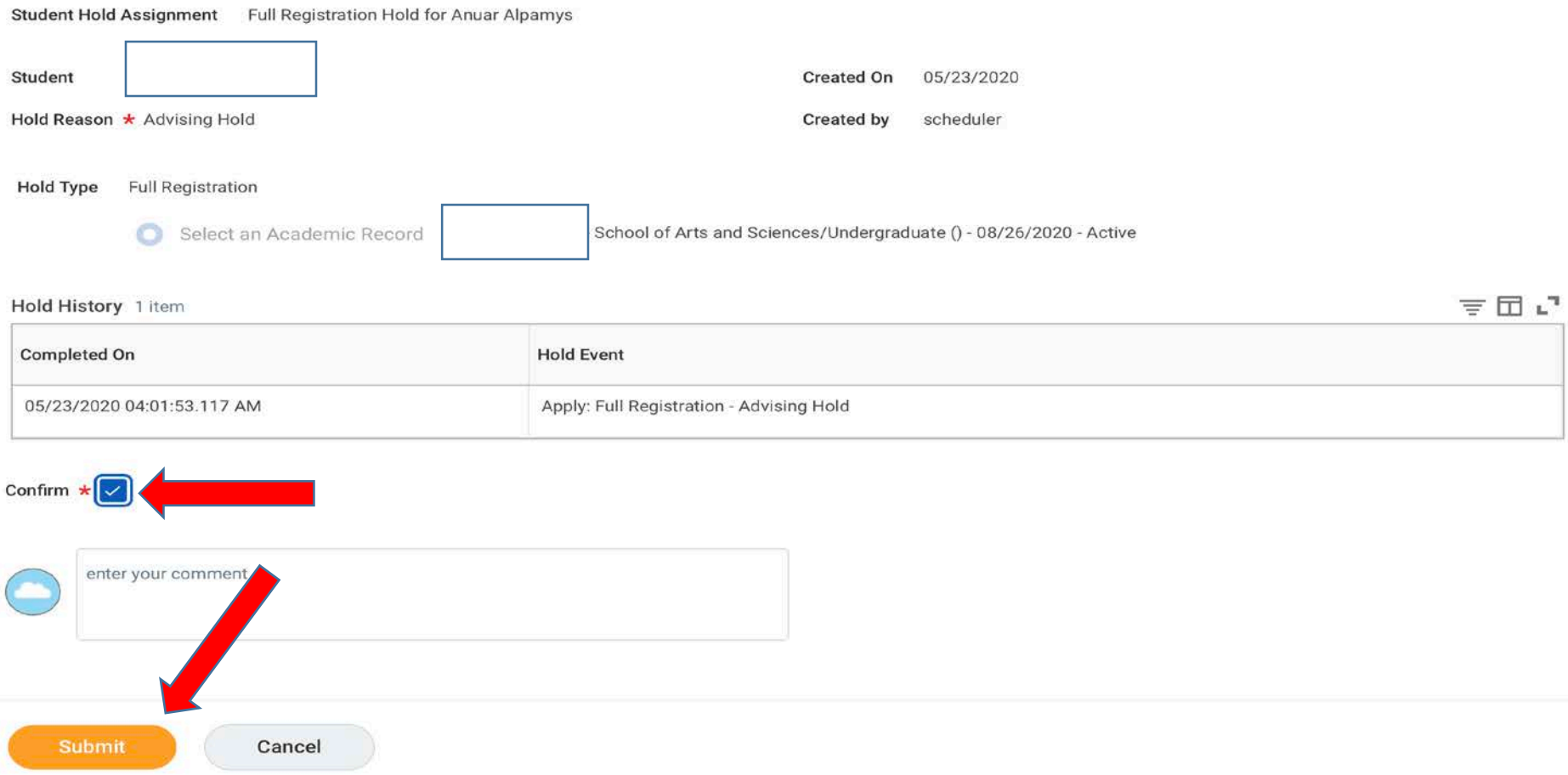
Find and Remove Holds using the “Related Action”

- Hover over the “Full Registration For…” hold in the appropriate student’s row
- Click on the “Related Actions” button •••
- Click ”Hold” from the Actions menu on the left of the pop-up window
- Click “Remove Hold”



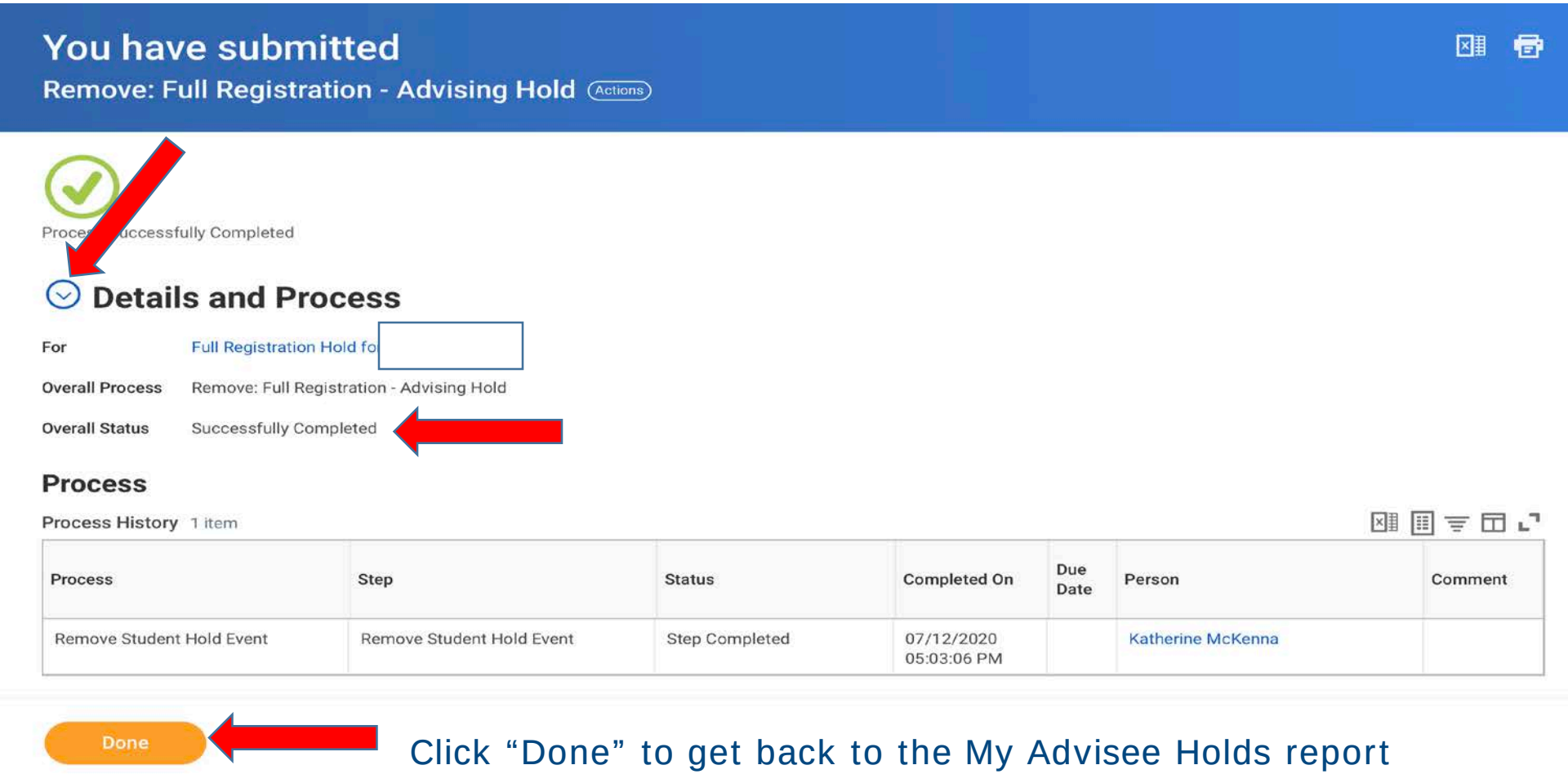
Confirm hold removal, comment and submit

- You must check the “Confirm” box and click “Submit to remove the hold
- Adding a comment is optional (if you have the WalkMe plug in installed, it will prompt you create a comment)



Confirmation that you've removed hold

- Click "Done" to get back to the My Advisee Advising Holds report
- *Optional: If you'd like to see the full details of the hold removal process, you can click the "carrot" to see the Overall Process and Overall Status*

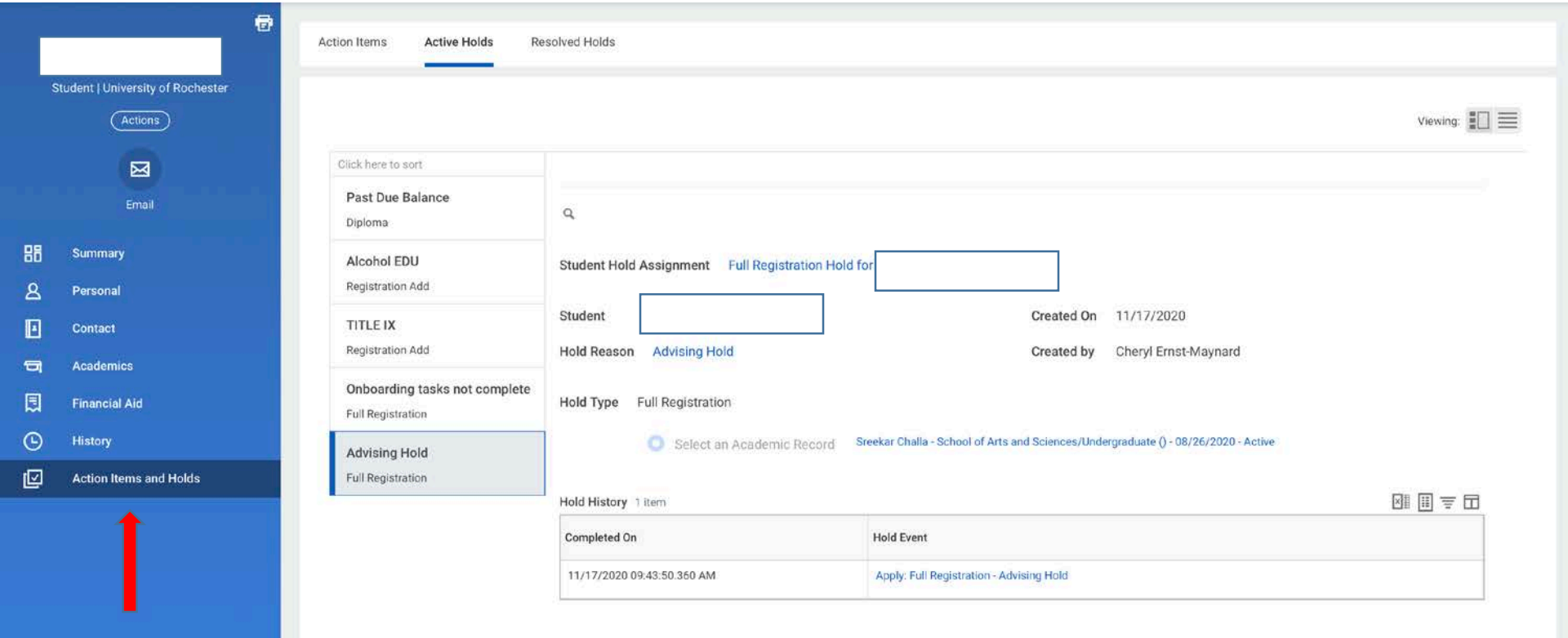


Click "Done" to get back to the My Advisee Holds report

View and Remove Holds on the Student Profile

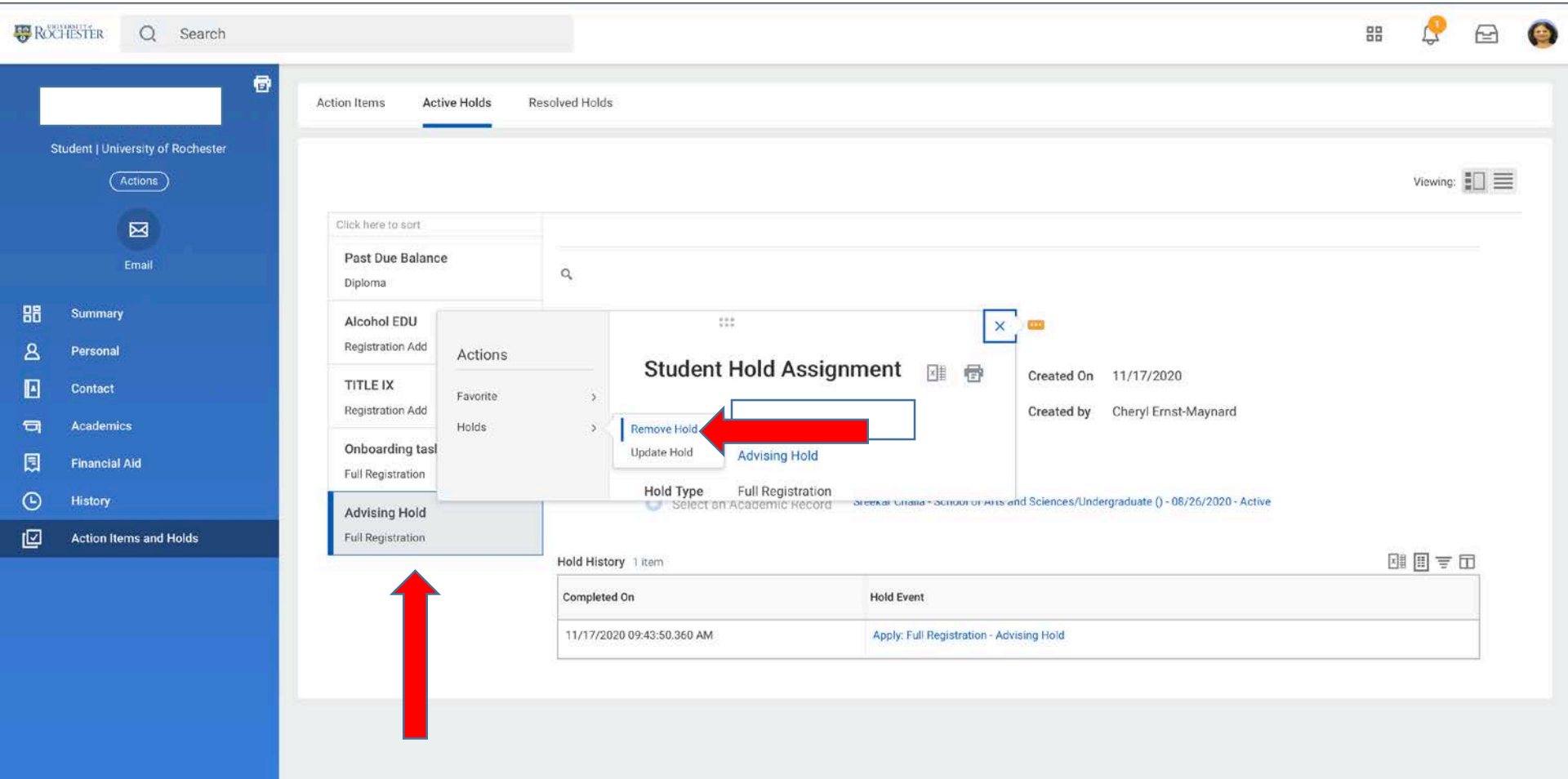
You can also view and remove holds from the student's profile

- Click "Action Items and Holds" on the menu on the student profile
- Use the tabs at the top to see:
  - Action Items (such as onboarding steps)
  - Active Holds (holds that are currently applied to student's record)
  - Resolved Holds (holds that have been removed)



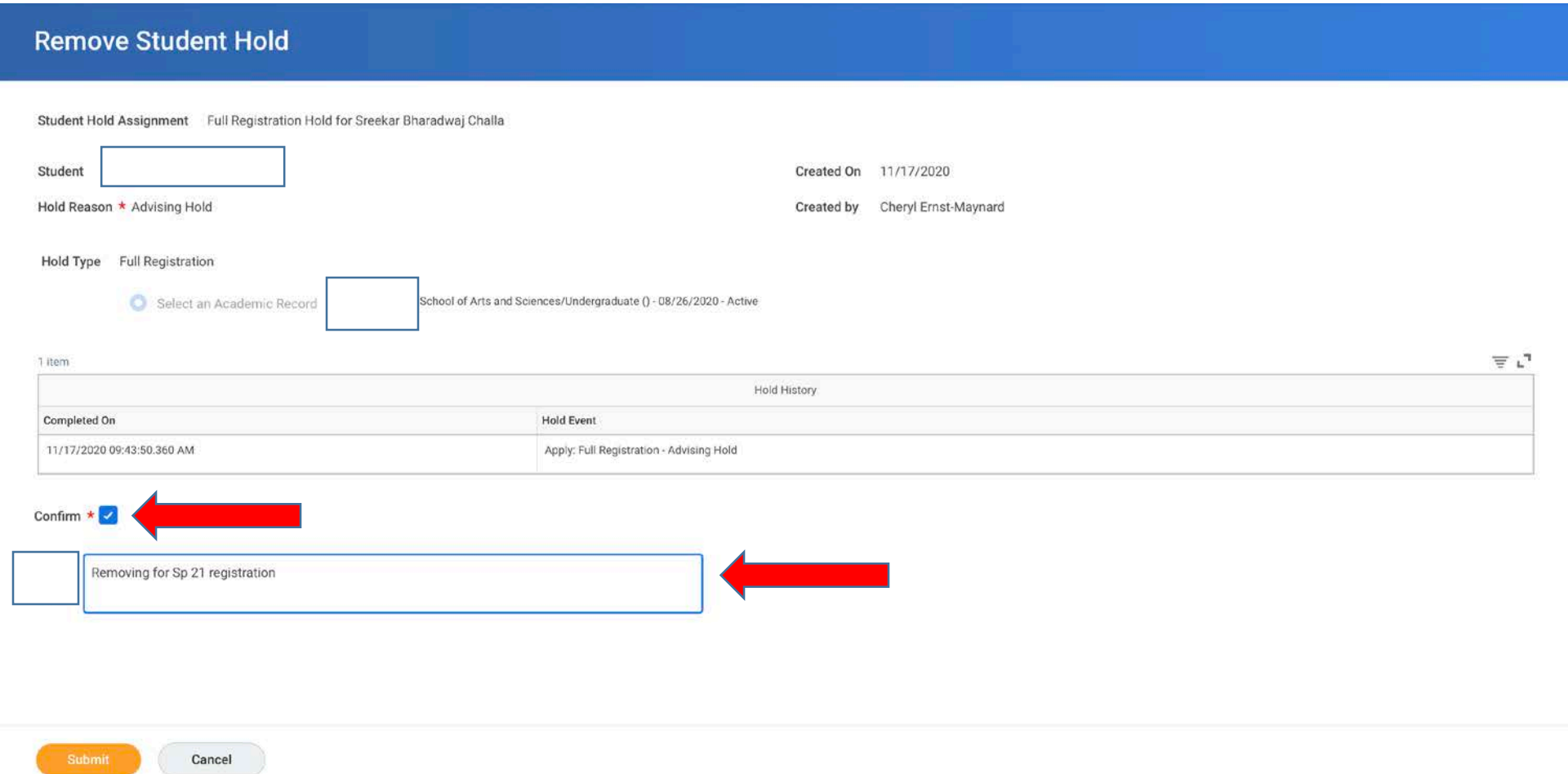
Removing Advising Hold

- Find your Advising Hold on the “Active Holds” tab
- Click the related actions button (“Twinkie”) next to the hold
  - Where it says “Student Hold Assignment – Full Registration Hold for xxxx”



Remove Hold and Confirm

- After choosing ”Remove Hold” from the menu, confirm the removal on the next screen by checking the “Confirm” box.
  - If you have the Walk Me browser extension, the system will require you to enter something in the comment box before clicking “Submit”



Important Notes

- Advisors may only remove Advising Holds based on their security permissions
- Advisors can lift the hold on any student for whom they can view the Student Profile
- **It is imperative that advisors only remove the advising holds on the students for whom they are the College Advisor, Hajim Faculty Advisor (or Program Coordinator) or Undergraduate Advisor**
  - I.e., Do not remove advising holds from students who are not your College Advisor, Undergraduate Advisor, or Hajim Advisor cohorts
- **If you do have to remove a hold for another advisor, please add a brief advising note to the student's record.**