



UR STUDENT SYSTEM

Removing Advising Holds

Presenter:

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UNIVERSITY of
ROCHESTER

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

The screenshot shows the University of Rochester dashboard interface. At the top left is the University of Rochester logo. To its right is a search bar with a magnifying glass icon and the text "Search". Further right are icons for "Need Help?", a notification bell, and a printer icon. Below the header is a banner image of students in a laboratory. A white box below the banner says "Welcome, On behalf of:" followed by a redacted name and a settings gear icon. The main content area is divided into two columns. The left column contains three sections: "Announcements" with a megaphone icon and "2 items", "Inbox" with a printer icon and "0 items", and two announcement cards. The first card is titled "Instructor Reminder on Registration Requests" and features a yellow sticky note icon with the word "Reminder!". The second card is titled "Welcome UR Student users!" and features an icon of three students with graduation caps and the text "UR Student". The right column contains a "Applications" section with a puzzle piece icon and "9 items". Below this is a grid of application icons: "Academics" (book icon), "My Advisees" (two people icon), "Teaching" (hand pointing to screen icon), "Curriculum Administrators" (document with photo icon), "Finances" (classroom icon), "Favorites" (star icon), "Academic Advising Reports" (document with photo icon), "Student Records Reports" (document with photo icon), and "Cohort" (two people icon). A large red arrow points from the top right towards the "My Advisees" icon.

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

My Advisees



ALERT!

If you are advising a Hajim student and need to remove ...

[View More](#)



REMINDER!

Incoming students are now included in your Advising co...

[View More](#)



TIPS:

My Advisee Dashboard Tips: Click on the tabs across th...

[View More](#)

[My Advisees](#) [Quick Links](#) [Advisee Notes](#) [Additional Reports](#) [Advisee GPA Reports](#)

My Advisee List



Legal Name	Student (Preferred Name)	Student ID	Pronoun	Photo
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My Advisee Count



Student Cohort	Count of Members in Cohort
College Advisor: Buchiere	52
CCAS Advisor: Buchiere	19
Undergraduate Advisor: Buchiere	18
ASE Class of E5	6
ESM Class of E5	0
Total	95

[View More ...](#)

ASE Advising Holds

My Advisee Advising Holds URSTU N1617



My Advisee All Holds

Student ID	Student (Preferred Name)	Legal Name	Class Year
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ASE Class
2022

ASE Class
2022

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.)*

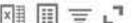
My Advisee Advising Holds URSTU N1617

Active



My Advisee Advising Holds URSTU N1617

39 Items



Student ID	Legal Name	Student (Preferred Name)	Class Year	Student Cohort	Student Hold Assignments			Primary Program of Study Record Status	Pri
					Hold	Hold Reason	Hold Created Date		
			ASE Class of 2024	College Advisor: Angela Buchiere		Advising Hold	04/12/2020	Matriculated	Hi
			ASE Class of 2024	College Advisor: Angela Buchiere		Advising Hold	05/02/2020	Matriculated	In
			ASE Class of 2024	College Advisor: Angela Buchiere		Advising Hold	05/10/2020	Matriculated	Bi
			ASE Class of 2024	College Advisor: Angela Buchiere		Advising Hold	05/06/2020	Matriculated	M
			ASE Class of 2024	College Advisor: Angela Buchiere		Advising Hold	05/06/2020	Matriculated	Ge
			ASE Class of 2024	College Advisor: Angela Buchiere		Advising Hold	04/15/2020	Matriculated	W
			ASE Class of 2024	College Advisor: Angela Buchiere		Advising Hold	04/29/2020	Matriculated	In
			ASE Class of 2024	College Advisor: Angela Buchiere		Advising Hold	05/06/2020	Matriculated	Ph
			ASE Class of 2024	College Advisor: Angela Buchiere		Advising Hold	05/03/2020	Matriculated	M
			ASE Class of 2024	College Advisor: Angela Buchiere		Advising Hold	04/06/2020	Matriculated	St
			ASE Class of 2024	College Advisor: Angela Buchiere		Advising Hold	04/06/2020	Matriculated	Bi
			ASE Class of 2024	College Advisor: Angela Buchiere		Advising Hold	04/06/2020	Matriculated	Ne
			ASE Class of 2024	College Advisor: Angela Buchiere		Advising Hold	04/06/2020	Matriculated	B.

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

My Advisee List URSTU N1109

Actions

93 items

Legal Name	ding as	Academic Standing as of Today	First Standard Academic Period for Student	Advisors Assigned	Student	Academic Units Assigned to Cohorts	Academic Levels Assigned to Cohorts	
			Fall 2016 AS&E	Angela Buchiere		College of Arts, Sciences and Engineering	Undergraduate	
			Fall 2018 AS&E	Angela Buchiere Deborah Pulley Edwin VanWijngaarden Jennifer Sherwood Nancy Chin More (2)		College of Arts, Sciences and Engineering Multidisciplinary Studies Center	Undergraduate	
			Fall 2018 AS&E	Angela Buchiere Elizabeth Grayhack Marianne Arcoraci	ASE Class of 2022 ASE Upperclassman Enrollment Policy Biological Sciences Undergraduate Students PS in Biological Sciences	Advising Class Year Enrollment Policy Rule Set	College of Arts, Sciences and Engineering	Undergraduate

- Chemistry Undergraduate Students
- Clinical and Social Psychology Undergraduate Students
- College Advisor: Angela Buchiere
- Computer Science Undergraduate Students
- Data Science BA (DSC) Program Advisor: Anand
- Data Science BS (DSC) Program Advisor: Anand
- Data Science Undergraduate Students

search

- College Advisor: Angela Buchiere

Filter

Students
More (3)

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*

My Advisee List URSTU N1109 Actions



52 of 93 items

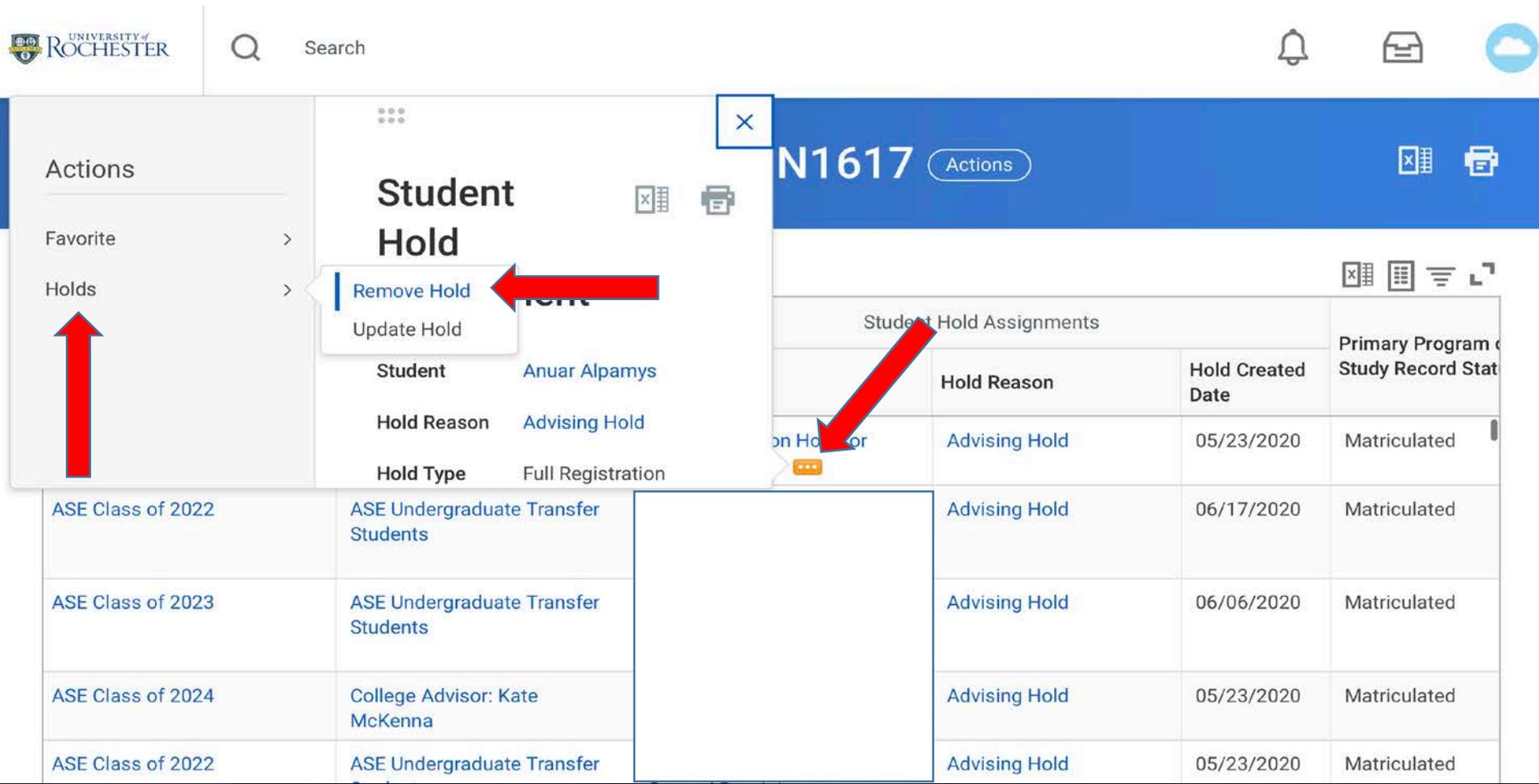


Legal Name	al Email	Class Standing as of Today	Academic Standing as of Today	First Standard Academic Period for Student	Advisors Assigned	Student Cohort	Cohort Type	Academic Units Assigned to Cohorts
				Fall 2020 AS&E	Angela Buchiere Jacquilyn Rizzo Pablo Sierra	<div style="border: 1px solid #ccc; padding: 5px;"><p>↑ Sort Ascending</p><p>↓ Sort Descending</p><p>Filter Condition *</p><p>is</p><p>Value *</p><p>× College Advisor: Angela Buchiere</p><p>Filter Remove Filter</p></div>		College of Arts, Sciences and Engineering
				Fall 2020 AS&E	Angela Buchiere Donna Smith Gerald Gamm Jer...			College of Arts, Sciences and Engineering
				Fall 2020 AS&E	Angela Buchiere	ASE Class of 2024 ASE First Year Enrollment Policy College Advisor: Angela Buchiere School of Arts and Sciences	Advising Class Year Enrollment Policy Rule Set	College of Arts, Sciences and Engineering



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”



The screenshot displays the University of Rochester student portal interface. At the top left is the University of Rochester logo and a search bar. On the right, there are icons for notifications, a folder, and a cloud. The main content area shows a table of student holds. A pop-up window titled "Student Hold" is open over one of the rows, showing details for a student named Anuar Alpamys with an Advising Hold of Full Registration type. The "Remove Hold" option is highlighted in the pop-up. A red arrow points to the "Holds" menu item in the left sidebar. Another red arrow points to the "Remove Hold" option in the pop-up. A third red arrow points to the "Full Registration For..." hold in the table.

Student Hold Assignments		Hold Reason	Hold Created Date	Primary Program of Study Record Status
ASE Class of 2022	ASE Undergraduate Transfer Students	Advising Hold	05/23/2020	Matriculated
ASE Class of 2023	ASE Undergraduate Transfer Students	Advising Hold	06/17/2020	Matriculated
ASE Class of 2024	College Advisor: Kate McKenna	Advising Hold	06/06/2020	Matriculated
ASE Class of 2022	ASE Undergraduate Transfer	Advising Hold	05/23/2020	Matriculated

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)

Student Hold Assignment Full Registration Hold for Anuar Alpamys

Student

Created On 05/23/2020

Hold Reason * Advising Hold

Created by scheduler

Hold Type Full Registration



Select an Academic Record

School of Arts and Sciences/Undergraduate () - 08/26/2020 - Active

Hold History 1 item



Completed On	Hold Event
05/23/2020 04:01:53.117 AM	Apply: Full Registration - Advising Hold

Confirm *



enter your comment



Submit

Cancel

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*

You have submitted

Remove: Full Registration - Advising Hold Actions



Details and Process

For Full Registration Hold for

Overall Process Remove: Full Registration - Advising Hold

Overall Status Successfully Completed

Process

Process History 1 item

Process	Step	Status	Completed On	Due Date	Person	Comment
Remove Student Hold Event	Remove Student Hold Event	Step Completed	07/12/2020 05:03:06 PM		Katherine McKenna	

Done

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)

The screenshot displays the University of Rochester student profile interface. On the left is a blue navigation sidebar with a search bar at the top, followed by a search icon and the text "Student | University of Rochester". Below this is a "Actions" button, an "Email" button with an envelope icon, and a list of menu items: Summary, Personal, Contact, Academics, Financial Aid, History, and Action Items and Holds. A red arrow points to the "Action Items and Holds" menu item. The main content area has three tabs: "Action Items", "Active Holds" (which is selected and underlined), and "Resolved Holds". In the top right corner of the main area, there is a "Viewing:" label with a grid icon and a list icon. The "Active Holds" section contains a search bar and a list of holds. The first hold is "Full Registration Hold for [redacted]". Below this, the "Student" field is [redacted], "Created On" is "11/17/2020", "Hold Reason" is "Advising Hold", and "Created by" is "Cheryl Ernst-Maynard". The "Hold Type" is "Full Registration". Below the hold details, there is a blue circular icon and the text "Select an Academic Record" followed by "Sreekar Challa - School of Arts and Sciences/Undergraduate () - 08/26/2020 - Active". At the bottom, there is a "Hold History" section with "1 item". A table below this shows the history of the hold:

Completed On	Hold Event
11/17/2020 09:43:50.360 AM	Apply: Full Registration - Advising Hold

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”

The screenshot displays the University of Rochester student portal interface. On the left is a blue navigation sidebar with options like Summary, Personal, Contact, Academics, Financial Aid, History, and Action Items and Holds. The main content area is titled 'Active Holds' and shows a list of holds. One hold is highlighted: 'Student Hold Assignment' with a 'Full Registration' type. A red arrow points to the 'Remove Hold' button in the actions menu for this hold. Another red arrow points to the 'Advising Hold' entry in the left sidebar. Below the hold details is a 'Hold History' table with one entry.

Completed On	Hold Event
11/17/2020 09:43:50.360 AM	Apply: Full Registration - Advising Hold

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"

Remove Student Hold

Student Hold Assignment Full Registration Hold for Sreekar Bharadwaj Challa

Student

Created On 11/17/2020

Hold Reason * Advising Hold

Created by Cheryl Ernst-Maynard

Hold Type Full Registration

Select an Academic Record School of Arts and Sciences/Undergraduate () - 08/26/2020 - Active

1 item



Hold History	
Completed On	Hold Event
11/17/2020 09:43:50.360 AM	Apply: Full Registration - Advising Hold

Confirm *



Removing for Sp 21 registration



Submit

Cancel

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.**