4   Setup Information

To begin using the CA program, the setup information for the institution must be entered. The setup information provides the foundation for the use of the CA program by institutional users.

This chapter will review:

- Accessing Setup Information
- Member Information
- Financial Aid Sources
- Sports Sponsorship
- Cost of Attendance/Grant-in-Aid (COA/GIA)
- User-Defined Fields
- Other Sports Setup
- Educational Institutions
- Administrative Duties/Roles
- Academic Calendar
- Forms Setup

Click on video icon and view the video

Getting Started - Setup

Accessing Setup Information

The Setup Information screens described in this chapter are accessed by clicking the "Setup" link in the Account Links menu on the left side of the screen.

Member Information

○ The Member Information section is accessed by clicking the "Member Information" link in the Account Links menu on the left side of the screen.

○ This section allows the user to enter information that is specific to the institution and that customizes the CA program for use at that institution.

○ In addition, several items within the Member Information section are used by the program to determine how NCAA legislation is applied (e.g., NCAA division, GPA scale).

○ It is important to note that there is an opportunity to assign a division for each sport sponsored by the institution. Please see the Sports Sponsorship section of this chapter.

How to Enter General Member Information

1. Click the "Member Information" link in the Account Links menu on the left side of the screen.

2. A General Member Setup screen appears.

a. Enter the institution's name, address information and phone number.

b. Choose the institution's NCAA "Division" from the drop-down box. Please note that it is important to choose the correct division in order for the CA program to make division-appropriate information available to the user.

c.   Choose the institution's "Academic Calendar" ("Semester" or "Quarter") from the drop-down box. It is important to choose the correct calendar option so that the CA program will show the appropriate calendar selections when awarding aid to student- athletes.

d.   Indicate whether the institution is a "Service Academy." This field is used in the Recruiting, Playing Seasons, Student-Athletes, and Athletics Personnel sections and is necessary for the CA program to determine how to apply legislation specific to a service academy.

e.   Indicate whether the institution is a provisional member of the NCAA in the current academic year.

f.   Indicate whether the institution is a "National Letter of Intent Participant." This field is used by the system in the Recruiting area.

g.   Enter the "GPA Scale" of the institution (e.g., 5.0).

h.   Indicate the format the institution employs for its "School Student ID Format." (See the following section "How to Complete the Social Security Number and Student ID Information Items" for detailed information regarding this question.)

i.   Choose the school's "Email Client" (e.g., Microsoft Outlook) from the drop-down box. This may help the institution's identify the preferred client (e.g., identify if there may be compatibility issues).

j.   Indicate whether the "Social Security number is the same as the Student ID." (See the following section "How to Complete the Social Security Number and Student ID Information Items" for detailed information regarding this question.)

k.   Indicate whether the institution has an interim term between semesters (e.g., mini-term, J-term) or an interim term that begins during or following the spring term.

    •   If the **"Yes"** radio button is clicked to indicate the institution has an interim term that begins during or following the spring term, another question will appear to indicate whether the session ends before the spring commencement.
    •   If the **"Yes"** radio button is clicked to indicate the institution does have an interim term, the Degree Progress screen for student-athletes will provide an area in the chart at the top of the screen to track credits for that term.

l.   Indicate whether the institution has a written policy against competition on a particular day for religious reasons per Bylaw 31. Select the **"Yes"** button if the institution has such a policy or select the **"No"** button if it does not.

m.   Indicate whether the institution qualifies to use the financial aid exception specified in NCAA Bylaw 15 for the sport of baseball.

- If the **"Yes"** button is clicked to indicate the institution does award athletically related financial aid based solely on demonstrated financial need, the institution is not subject to the 25 percent minimum equivalency requirement.
- If the **"No"** button is clicked to indicate the institution does not award athletically related financial aid based solely on demonstrate financial need, the institution is subject to the 25 percent minimum equivalency requirement.

[Note: The institution's answer also is reflected on the Sports Sponsorship detail screen for baseball in the "Use aid exception?" field.]

n.   **For Division I only** – Indicate whether the institution has authority to adopt or amend legislation that is identified as an area of autonomy (e.g., financial aid, concussion safety protocol, etc.). (See the following section "Indicating the Appropriate Equivalency Computation Denominator" for detailed information regarding this question.)

o.   **For Division I only** – This question is available only to users that indicated **"No"** to the previous autonomy question. Indicate whether the institution will calculate equivalency values using a full grant-amount that include tuition, fees, room, board, books and other expenses related to attendance at the institution up to the cost of attendance. (See the following section "Indicating the Appropriate Equivalency Computation Denominator" for detailed information regarding this question.)

3.   Once the General Member information is entered, click the **"Save"** button.

How to Complete the Social Security Number and Student ID Information Items

The Member Information section allows the user to indicate whether the Social Security number is the same as the institution's Student ID number.

1.   If "Yes" is chosen for the question regarding the Social Security number being the same as the Student ID, only the "Student ID" field will appear on the Detail screen in the Student-Athletes area. The "School Student ID Format" field on the Member Information screen is not used (the format of the "Student ID" field will be 999-99-9999).

Is the Social Security number the same as the Student ID? ⦿ Yes   ◯ No

2.   If "No" is chosen for the question regarding the Social Security number being the same as the Student ID, a "Student ID" field and a "SSN" field will appear on the Detail screen in the Student-Athletes area. The format of the "Student ID" field in the Student-Athletes section can be customized by the institution (see directions below).

Li̲ Detail Guardian Sports Financial Aid Initial Transfer General Deg. Progress Waivers Forms

| New Student | Delete Student |

Student ID 123456789   SSN 000-11-222   NCAA ID 0710275500   Search   Save

a.   The "Student ID" field may be numbers, letters or a combination of both as stated on the Member Information screen: 9 = Number, L = Letter, A = Number/Letter.

b.   If the "Student ID" field is stored as numbers only, the appropriate amount of the number "9" should be used to indicate the format. For example, if a student-athlete's ID is eight numbers ("12345678"), the format that should be entered in the "School Student ID Format" field is eight 9's ("99999999").

School Student ID Format 99999999   9=Number L=Letter A=Number/Letter

c.   If the "Student ID" field is stored as letters only, the appropriate amount of the letter "L" should be used to indicate the format. For example, if a student-athlete's ID is eight letters ("ABCDEFGH"), the format that should be entered in the "School Student ID Format" field is eight L's ("LLLLLLLL").

School Student ID Format LLLLLLLL   9=Number L=Letter A=Number/Letter

d.   If the "Student ID" field is stored as a combination of numbers and letters, the appropriate amount of the letter "A" should be used to indicate the format. For example, if a student-athlete's ID is a combination of eight numbers and letters ("1A2B3C4D"), the format that should be entered in the "School Student ID Format" field is eight A's ("AAAAAAAA").

School Student ID Format AAAAAAAA   9=Number L=Letter A=Number/Letter

e.   If the "Student ID" field contains a symbol, type the symbol directly in the format field. For example, if a student-athlete's ID is a symbol and a combination of three letters or numbers (@K5Y), the format that should be entered in the "School Student ID Format" field is the symbol and three A's ("@AAA").

School Student ID Format @AAA   9=Number L=Letter A=Number/Letter

Division I Only - Indicating the Appropriate Equivalency Computation Denominator

Questions added to the Member Information area serve as the starting point for those institutions that are required to provide and/or for institutions opting to provide athletically related financial aid up to the value of cost of attendance.

Q1	Q2	Default ECD	Individual Limit	Rev. Dist.	Notes
Y	Y	COA/FGIA per Bylaw 15	Inst. COA or COA/FGIA per Bylaw 15 + Pell Grant	GIA/FGIA per Bylaw 20	Member of an autonomy conference and should not be able to change ECD.
Y	N	System will not allow.			
N	Y	COA/FGIA per Bylaw 15	Inst. COA or COA/FGIA per Bylaw 15 + Pell Grant	GIA/FGIA per Bylaw 20	Not autonomy but is providing COA to student-athletes.
N	N	GIA/FGIA per Bylaw 20	Inst. COA or GIA/FGIA per Bylaw 20 + Pell Grant	GIA/FGIA per Bylaw 20	Not autonomy, not providing COA. Still can provide to individual student-athlete.

Answer the new question(s) pertaining to autonomy legislation to set appropriate financial aid defaults.

> Per Constitution 5.3.2.1.1, does your institution have authority to adopt or amend legislation that is identified as an area of autonomy?   ● Yes   ○ No
>
> Per Bylaw 15.3.2, does your institution calculate equivalency values using a full grant-in-aid amount that include tuition, fees, room, board, books and other expenses related to attendance at the institution up to the cost of attendance?   ● Yes   ○ No
>
> Save

a.   If the user selects "Yes" to the initial question, by default the second question will be changed to "Yes" and cannot be changed.

b.   The outcome of this selection is the equivalency computation denominator will default to COA/FGIA per Bylaw 15 for all sports and all student-athletes.

> Per Constitution 5.3.2.1.1, does your institution have authority to adopt or amend legislation that is identified as an area of autonomy?   ○ Yes   ● No
>
> Per Bylaw 15.3.2, does your institution calculate equivalency values using a full grant-in-aid amount that include tuition, fees, room, board, books and other expenses related to attendance at the institution up to the cost of attendance?   ● Yes   ○ No
>
> Save

a.   If the user selects "No" to the initial question, the user has the opportunity to select "Yes" or "No" to the second question.

b.   If the user selects "No" to the initial question and "Yes" to the second question:

 i.   COA/FGIA per Bylaw 15 and GIA/FGIA per Bylaw 20 become options in the drop-down menus on the sports sponsorship detail screens and student-athlete financial aid screens.

 ii.   The Equivalency Computation Denominator field will default to COA/FGIA per Bylaw 15 on the student-athlete screen.

iii.   The defaults can be changed at the sports sponsorship or student-athlete levels.

| Per Constitution 5.3.2.1.1, does your institution have authority to adopt or amend legislation that is identified as an area of autonomy? | ○ Yes | ◉ No |
| Per Bylaw 15.3.2, does your institution calculate equivalency values using a full grant-in-aid amount that include tuition, fees, room, board, books and other expenses related to attendance at the institution up to the cost of attendance? | ○ Yes | ◉ No |

Save

a.   If the user selects "No" to the initial question, the user has the opportunity to select "Yes" or "No" for the second question.

b.   If the user selects "No" to the initial question and "No" to the second question:

i.   COA/FGIA per Bylaw 15 and GIA/FGIA per Bylaw 20 become options in the drop-down menus on the sports sponsorship detail screens and student-athlete financial aid screens.

ii.   The Equivalency Computation Denominator field will default to GIA/FGIA per Bylaw 20 on the student-athlete screen.

iii.   The defaults can be changed at the sports sponsorship and student-athlete levels.

How to Enter Conference Information

1.   Click "Member Information" in the Account Links menu on the left side of the screen.

2.   Click the Conferences tab.

3.   A screen appears with a list of the conferences, depending on the overall division of the institution set on the Member Information screen. (The picture below shows the first part of the Division I list of conferences.)

General Conferences

Conference Men: Independent
Conference Women: Independent

Save

Conference Name	Overall Men?	Overall Women?
Independent	◉	◉
America East Conference	○	○
American Athletic Conference	○	○
Atlantic 10 Conference	○	○
Atlantic Coast Conference	○	○
Atlantic Hockey Association	○	○
Atlantic Sun Conference	○	○
Big 12 Conference	○	○

a.   Click the appropriate button for the institution's conference in the "Overall Men" column.

b.   Click the appropriate button for the institution's conference in the "Overall Women" column.

c.   Click the **"Save"** button.

d.   Note that conference information will appear for selection on approximately September 1 of each academic year after submission of sports sponsorship information.

Financial Aid Sources

○   The Financial Aid Sources section is accessed by clicking "Financial Aid Sources" in the Account Links menu on the left side of the screen.

○   This section allows the user to add new fund codes and/or review current fund codes.

○   The List screen shows all of the "Fund Codes" that have been entered by the user, with the corresponding "Fund Name" (assigned by the user) and "Aid Description" (which is the "Aid Type" used by the CA program to determine whether aid is countable against individual and/or team limits).

List	Detail	Setup Questions

New Fund Source

Total Aid: 82   1-25 26-50 51-75 76-82 All Next

Fund Code	Fund Name	Aid Description
0000	0finaidnotadminbyinst	DI Financial Aid Not Administered by Institution
0QUEST01	Quest for Excellence Scholarship	DI Academic Honor Award - High School
123456789012	12 character fund code	DI Institutional Grant
AAA	AAA	DI Academic Honor Award - High School
ABEFA	September Meeting Scholarship	DI Institutional Grant
ACAD	DI Honorary Academic Award	DI Honorary Academic Award/Research Grant
ACAHONHS	test DI Academic Honor Award-HS	DI Academic Honor Award - High School
ACAHONTR	DI Academic Honor Award-Transfer	DI Academic Honor Award - Transfer
AFUNDCODE	fund code lower case a	DI Institutional Grant
ATHL	Athletics Grant	Athletics Grant-in-Aid
BBB	BBBB	DI Institutional Academic Scholarship
CHANCIAS	Chancellors Inst Academic Scholarship	DI Institutional Grant
CHNG	Change Test	Athletics Grant-in-Aid
COBB	COBB Test	DI Government Grant
COBB2011	Outside No relationship to athletics	DI Financial Aid Not Administered by Institution
CRUSADER	Crusader Scholarship	Athletics Grant-in-Aid
DI GO	DI Government Grant	DI Government Grant
DI GOV	DI Federal Need-Based Aid	DI Federal Need-Based Aid
DI GOV G	Division I Government Grant	DI Government Grant

How to Add a Fund Code

1.   Click the "Financial Aid Sources" in the Account Links menu on the left side of the screen.

2.   Click the **"New Fund Source"** button.

3.   A Detail screen appears.

a.   Enter a "Fund Code" (up to eight letters and/or numbers). **DO NOT USE SYMBOLS** (e.g., &, #, etc.).

b.   Enter a "Fund Name" (description of the aid). **DO NOT USE SYMBOLS** (e.g., &, #, etc.).

c.   Choose an "Aid Type" from the drop-down box.

- Prior to adding financial aid sources into the CA program, communication between institutional offices (e.g., athletics and financial aid) is crucial so that the institution maintains consistent naming and coding of fund sources it awards. This is extremely important for institutions considering importing and exporting financial aid data between systems on campus.
- It is important to note that the "Aid Type" chosen will dictate how the CA program determines whether the aid is countable in the individual and team limits. The aid type of a fund code cannot be changed, so choose aid types carefully.
- Please refer to the "Financial Aid Algorithms" section located in the Financial Aid Information chapter of the User Guide for information regarding the questions that are asked for different aid types. The aid types have been defined by current NCAA legislation.
- Please note that if the user prefers to determine the total amount of countable aid and exempt aid that a student-athlete receives, two aid types called "Other countable aid (you determine)" and "Other countable-exempt (you determine)" are available for use when awarding aid to student-athletes. Please refer to the Financial Aid Information chapter of the User Guide for more information on the use of these aid types.

d.   Enter "Default" information if desired.

- If information is entered into the default fields ("Amount," "Date of Award" or "Period of Award") for a fund code, this information will automatically appear on the Financial Aid screen in the Student-Athletes area every time the fund code is entered for a student-athlete.
- The values of the default information may be manually changed on the Financial Aid screen in the Student-Athletes area, if necessary.
- If the default information is changed on the Detail screen of the Financial Aid Sources section after the fund code has been awarded to student-athletes, the change only will apply to the student-athletes who are awarded the fund code after the change. **(The CA program will not modify the awards of student-athletes that were awarded the fund code prior to the change.)**

4.   Once the information for the fund code is entered, click the **"Save"** button.

a.   Depending on the "Aid Type" chosen, the Setup Questions screen may appear. The questions appear when the system needs more information to determine whether this fund code will or will not count in individual and/or team limits. It is very important that the questions are answered carefully and accurately.

b.   Click the appropriate "Yes" or "No" response for each question. Again, answer these questions carefully.

c.   Once the questions have been answered, click the **"Save"** button to return to the Detail screen.

d.   If the response to a question needs to be changed, click the particular fund source and click the Setup Questions tab at the top of the screen.

How to Delete a Fund Code

Please note that once a fund source has been awarded to a student-athlete, that fund code may not be deleted from the Financial Aid Sources section in that academic year. If the fund code is no longer appropriate and it has been assigned to student-athletes, it is recommended that notes are made in the "Fund Code" field and "Fund Code Comments" box. (It is also recommended that the date and reasons why are included.)

1.   Click "Financial Aid Sources" in the Account Links menu on the left side of the screen.

2.   Click the fund code to be deleted and the Detail screen for that code will appear.

3.   Click the **"Delete Fund Source"** button.

4.   If that fund code has not been awarded to a student-athlete, a dialog box will appear asking, "Are you sure you want to delete this record?"

    a.   Click the **"OK"** button to delete the fund code and return to the List screen in the Financial Aid Sources section.

    b.   Click the **"Cancel"** button to keep the fund code.

5.   If the fund code has been awarded to a student-athlete, a message will appear stating "Error Deleting aid. This aid may already be in use." The code will first need to be removed from the student-athletes' Financial Aid screens before it can be deleted.

Sports Sponsorship

○   The "Sports Sponsorship" section is accessed by clicking "Sports Sponsorship" in the Account Links menu on the left side of the screen.

○   This section allows the user to enter information about each NCAA sport the institution sponsors. If desired, Non-NCAA sports ("Other Sports") also may be entered in order for rosters and other reports (e.g., squad lists) to be produced for those sports.

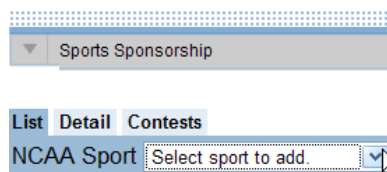| Sport Code	Description	Division	Equivalency/Counter Limit
MBA	Baseball	I	11.7
MBB	Men's Basketball	I	13.0
MCC	Men's Cross Country	I	12.6
MFB	Football	I-AA	63.0
MFE	Men's Fencing	I	4.5
MGO	Men's Golf	I	4.5
MGY	Men's Gymnastics	I	6.3
MIH	Men's Ice Hockey	I	18.0
MSO	Men's Soccer	I	9.9
MTE	Men's Tennis	I	4.5
MTI	Men's Track, Indoor	I	12.6
MTO	Men's Track, Outdoor	I	12.6
WBB	Women's Basketball	I	15.0
WCC	Women's Cross Country	I	18.0
WFH	Field Hockey	I	12.0
WGO	Women's Golf	I	6.0
WGY	Women's Gymnastics	I	12.0
WIH	Women's Ice Hockey	I	18.0
WLA	Women's Lacrosse	I	12.0
WSB	Women's Softball	I	12.0
WSK	Women's Skiing	I	7.0
WSO	Women's Soccer	I	12.0
WSW	Women's Swimming	I	14.0
WTE	Women's Tennis	I	8.0
WTI	Women's Track, Indoor	I	18.0

Found: 29   1-25 26-29 View All Next

How to Add an NCAA Sport

1.   Click "Sports Sponsorship" in the Account Links menu on the left side of the screen.

2.   Click the arrow to the right of the "NCAA Sport" drop-down box to see a list of sports to add.

3.   Scroll down and click the sport to be added.

4.   A Detail screen appears.

a.   Ensure that the "Division" field is accurate for that sport so that the appropriate NCAA rules are applied to student-athletes assigned to that sport.

b.   The "NCAA Conference" field will list all of the conferences in the division chosen for the sport. The "Non-NCAA Conference" field allows the user to enter the name of a Non-NCAA conference for the sport.

c.   The "Equivalency," "Counter" and "Initial Counters Limit" fields are automatically filled in by CA program to be the maximum limit allowed by NCAA division specific sport legislation.

        •   The equivalency or counter amounts may be manually reduced to reflect a maximum lower than the legislated limit; however, the number may not be changed to one that is higher than the NCAA legislated maximum.
        •   Please note that if a Division I or II institution sponsors cross country but not track, the user will be responsible for changing the cross country equivalency to five for men and six for women.
        •   The "Initial Counters Limit" field is only applicable for Football Bowl Subdivision and NCAA Football Championship Subdivision, and the field will automatically be filled in when those sports are added.

d.   Indicate the appropriate "Equivalency Computation Denominator" for this particular sport. (See "How to Change the Equivalency Computation Denominator by Sport" for detailed information regarding this field.)

e.   The "Use Aid Exception" field is only applicable when entering Football Championship Subdivision.

- If the institution sponsors Football Championship Subdivision and will be applying the legislated exception for it, the user should choose "Yes" for this question. The CA program then will not apply any of the financial aid limits for equivalencies, total counters or initial counters.
- If this exception is used and a student-athlete participates in football and another sport, the student-athlete's aid will not be allowed to count in football; instead, it will count in the other sport. If the aid should count toward football, the exception question must be answered "No."

f.   Click the **"Current Team Totals"** button to view the team's total numbers of counters, initial counters and/or equivalency based on the financial aid awarded to the student-athletes on the team.

5.   Once the information for the sport is entered, click the **"Save"** button.

How to Change the Equivalency Computation Denominator Default by Sport

1.   Click the "Setup" link in the Account Links menu.

2.   Click the "Sports Sponsorship" link in the Setup menu.


3.   Select the desired sport from the List screen.

4.   Select the desired default equivalency computation denominator.

5.   Click the **"Save"** button.

NOTE: This step is not necessary if the desired equivalency computation denominator is correct based on the answers to the Member Setup questions. This can override what the user selected on the Member Information screen as the default equivalency computation denominator at the student-athlete level for those assigned to a particular sport. Users should take care and consider the impact of the way in which questions are answered at each level.

How to Add an "Other" Sport

Please note that before adding an "Other" sport (a Non-NCAA sponsored sport) in the Sports Sponsorship section, the user first must set up the "Other" sports. (See the Other Sports section in this chapter for information on how to set up an "Other" sport.)

1.   To add an "Other" sport in the Sports Sponsorship section, click the arrow to the right of the "Other Sport" drop-down box to see a list of sports to add.
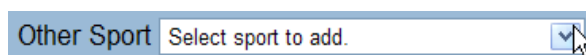
2.   Scroll down and click the sport to be added.

3.   A Detail screen appears.

    a.   Ensure that the "Division" field is accurate for that sport so that the appropriate NCAA rules will be applied to student-athletes assigned to that sport.

    b.   The "Equivalency," "Counter" and "Initial Counter" fields are not automatically filled in by the CA program.   If financial aid information is tracked for individuals in the "Other" sport, the user may enter a number of equivalencies or counters that will be the limit when producing a squad list for the team.

    c.   Click the **"Current Team Totals"** button to view the team's total numbers of counters, initial counters and/or equivalency based on the financial aid awarded

to the student-athletes on the team.   Note that this button only appears if equivalency or counter limits have been saved for that sport.

4.   Once the information for the sport is entered, click the **"Save"** button.

How to Delete a Sport

1.   Click "Sports Sponsorship" in the Account Links menu on the left side of the screen.

2.   Click the sport to be deleted and the Detail screen for that sport will appear.

3.   Click the **"Delete Sport"** button.

4.   If a student-athlete has not been assigned to the sport being deleted, a dialog box will appear asking, "Are you sure you want to delete this record?"

     a.   Click the **"OK"** button to delete the sport and return to the List screen in the Sports Sponsorship section.

     b.   Click the **"Cancel"** button to keep the sport.

5.   If a student-athlete has been assigned to the sport being deleted, a message will appear stating "Error deleting sport. If there are student-athletes listed as playing this sport, the sport cannot be deleted."

How to Add Contests

Contests for a sport may be added on the Contests tab of the Sports Sponsorship screen (in the Setup area) or in the Playing Seasons area by clicking the Contests tab.

1.   Click "Sports Sponsorship" in the Account Links menu on the left side of the screen.

2.   Click the sport in which contests will be added and a Detail screen will appear.

3.   Click the Contests tab.

4.   Click the **"Add Contest"** button.

5.   A screen appears to enter contests.

a.   Enter the "Date," "Opponent" and "Location" of the contest.

b.   Indicate whether the contest is a "Conference Event" from the drop-down box.

c.   Click the **"More Info"** button to enter additional notes and exemptions (i.e., "Counter," "First Contest," "End of Season") if applicable, and click the **"OK"** button.

• The "Counter Exemption" field is used to identify contests that are exempt from counting within a sport's legislated contest limits (e.g., foreign tour).

• The "First Contest Exemption" field is used to identify contests that may occur before the first permissible legislated date for competition (e.g., alumni contest, practice scrimmage).

• The "End of Season Contest Exemption" field is used to identify contests that may occur after the season but that are permissible exemptions (e.g., NCAA championships, football bowl game).

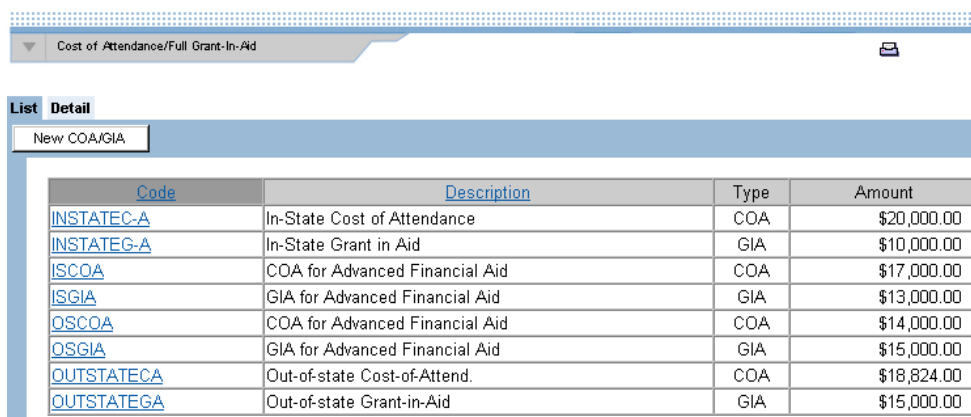6.   When done entering contest information, click the **"Save"** button.

How to Delete a Contest

1.   Click "Sports Sponsorship" in the Account Links menu on the left side of the screen.

2.   Click the sport for which a contest will be deleted.

3.   Click the **"Delete"** button that corresponds to the contest to be removed.

a.   Please note that after clicking the **"Delete"** button, a warning message does not appear before the contest is removed.

b.   If the **"Delete"** button is pressed mistakenly, the user can avoid deleting the contest by clicking off of the screen without clicking the **"Save"** button.

4.   Click the **"Save"** button to delete the contest.

Cost of Attendance/Full Grant-in-Aid (COA/GIA)

○   The Cost of Attendance/Grant-in-Aid section is accessed by clicking "COA/GIA" in the Account Links menu on the left side of the screen.

○   The "COA/GIA" screen allows the user to establish codes for specific cost of attendance, full grant-in-aid amounts and, for Division I, institutional cost of attendance for each academic year. Use of this screen is optional. If codes are entered in this area, these codes may be assigned to student-athletes while entering their financial aid information in the Student-Athletes area of the CA program.

○   One advantage of using COA/GIA codes is that it saves time in manually typing in the amounts of a full grant-in-aid or cost of attendance for each student-athlete. Once codes are created, a drop-down list containing the codes will appear on the student-athlete's Financial Aid screen to choose the appropriate code and amount.

○   Another advantage of using these codes is if the amount of a code changes during the year, the amount on this screen can be changed and it automatically will be changed for all student-athletes who have been assigned the code for that academic year.

How to Add a Cost of Attendance, Full Grant-in-Aid Code, and for Division I, Institutional Cost of Attendance

1.   Click "COA/GIA" in the Account Links menu on the left side of the screen.

2.   Click the **"New COA/GIA"** button.

3.   A Detail screen appears.

a.   Enter a "Code" (up to 10 letters and/or numbers).

b.   Select the appropriate code type from the Code Type drop-down menu.

    a.   GIA/FGIA per Bylaw 20.

    b.   COA/FGIA per Bylaw 15.

    c.   Institutional COA (Division I only).

c.   Enter a "Description" (to help identify the code).

d.   Enter an "Amount".

e.   Enter "Comments" (to further explain the code) if necessary.

4.   Once the COA/GIA information is entered, click the **"Save"** button.

How to Delete a COA/GIA

1.   Click "COA/GIA" in the Account Links menu on the left side of the screen.

2.   Click the COA or GIA to be deleted and the Detail screen for that code will appear.

3.   Click the **"Delete COA/GIA"** button.

4.   If that COA or GIA code has not been assigned to a student-athlete, a dialog box will appear asking, "Are you sure you want to delete this record?"

a.   Click the **"OK"** button to delete the COA or GIA and return to the List screen in the COA/GIA section.

b.   Click the **"Cancel"** button to keep the COA or GIA.

5.   If the code has been assigned to a student-athlete, a message will appear stating "Error deleting code. This code is in use. To delete the code, it must be removed from existing aid awards."

User-Defined Fields

○   The User-Defined Fields section is accessed by clicking "User-Defined Fields" in the Account Links menu on the left side of the screen.

○   The User-Defined Fields section allows the user to create fields to track information that is not being captured by the CA program. Having the ability to create user-defined fields allows increased flexibility in tailoring the CA program to the specific needs of the institution.

○   Up to 20 user-defined fields may be created for each of the related tables (e.g., "Student-Athlete General Eligibility," "Student-Athlete Sport"). The fields that are defined then appear on the designated screen.
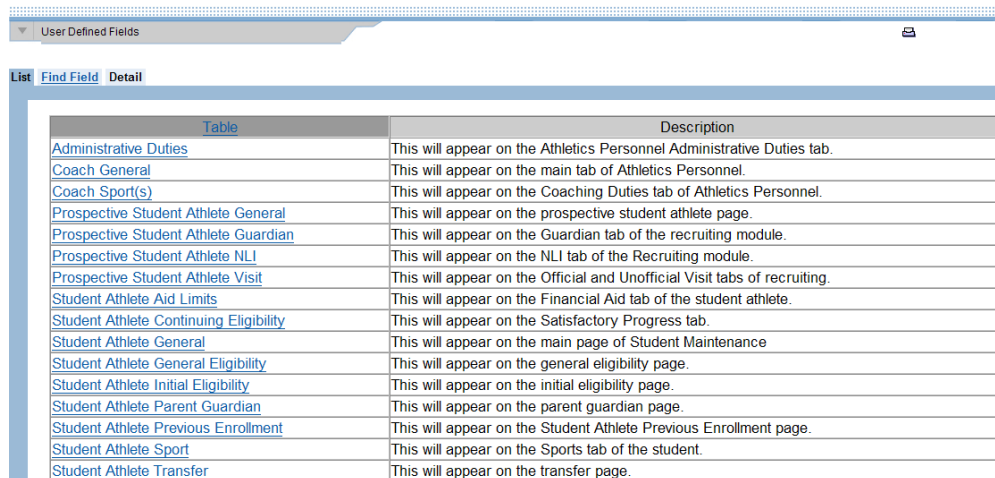
User Defined Fields

List Find Field Detail

Table	Description
Administrative Duties	This will appear on the Athletics Personnel Administrative Duties tab.
Coach General	This will appear on the main tab of Athletics Personnel.
Coach Sport(s)	This will appear on the Coaching Duties tab of Athletics Personnel.
Prospective Student Athlete General	This will appear on the prospective student athlete page.
Prospective Student Athlete Guardian	This will appear on the Guardian tab of the recruiting module.
Prospective Student Athlete NLI	This will appear on the NLI tab of the Recruiting module.
Prospective Student Athlete Visit	This will appear on the Official and Unofficial Visit tabs of recruiting.
Student Athlete Aid Limits	This will appear on the Financial Aid tab of the student athlete.
Student Athlete Continuing Eligibility	This will appear on the Satisfactory Progress tab.
Student Athlete General	This will appear on the main page of Student Maintenance
Student Athlete General Eligibility	This will appear on the general eligibility page.
Student Athlete Initial Eligibility	This will appear on the initial eligibility page.
Student Athlete Parent Guardian	This will appear on the parent guardian page.
Student Athlete Previous Enrollment	This will appear on the Student Athlete Previous Enrollment page.
Student Athlete Sport	This will appear on the Sports tab of the student.
Student Athlete Transfer	This will appear on the transfer page.

How to Add a User-Defined Field

1.   Click "User-Defined Fields" in the Account Links menu on the left side of the screen.

2.   Click the specific "Table" option (in the left column of the chart) in which a user-defined field will be created. The right column of the chart describes on which screen the user-defined field will appear.

3.   A Detail screen appears.

a.   Enter the name of the field to be created in the "Field 1" textbox.

b.   The "Copy Yearly?" column allows the user to indicate whether data entered in that particular field for a student-athlete will be carried over to the new year during the "Sport Season Startup" roll-over (see the Tools chapter for more information on the startup).

   •   If the data entered in the field will be the same from year to year, click "Yes" in the "Copy Yearly?" column so the value will not need to be re-entered for the student-athlete each year.
   •   If the data entered will change from year to year, select "No" so the data field will be blank each year.
   •   Note that if the field appears on a screen in which the data does not change each Year (e.g., "Student-Athlete General"), the information in the student-athlete's user-defined fields also will remain each year. The data stored in the user-defined fields may be manually changed if necessary.

c.   If the user-defined field should be a required field (a yellow field that must have data entered to be able to save the screen), choose "Yes" in the "Required?" column. If the user-defined field will not be a required field, click "No" in the "Required?" column.

4.   Once the user-defined fields information is entered, click the **"Save"** button.

How to Delete a User-Defined Field

1.   Click "User-Defined Fields" in the Account Links menu on the left side of the screen.

2.   Click the specific "Table" option (in the left column of the chart) in which the user- defined field will be deleted.

3.   A Detail screen appears with the list of user-defined fields that have been created.

4.   Highlight the name of the field to be removed and click the **"Delete"** button on the keyboard.

5.   Click the **"Save"** button.

How to Find a User-Defined Field
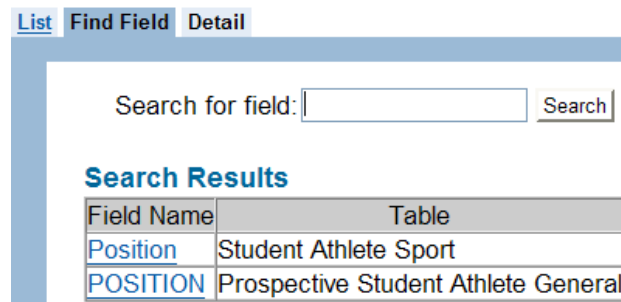
1.   Click "User-Defined Fields" in the Account Links menu on the left side of the screen.

2.   Click the Find Field tab at the top of the screen.

3.   Type in the name of the user-defined field in the "Search for field" box.

List **Find Field** Detail

Search for field: Position   Search
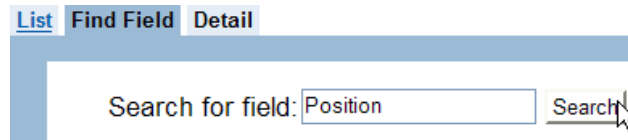
4.   Click the **"Search"** button.

5.   The "Search Results" area of the screen then shows the name of the field and table in which the data item was created.

List **Find Field** Detail

Search for field: | | Search

Search Results

Field Name	Table
Position	Student Athlete Sport
POSITION	Prospective Student Athlete General

6.   Click the field name to be viewed and the program will open the table in which the user-defined field was created.

Other Sports Setup

○   The "Other Sports Setup" section is accessed by clicking "Other Sports" in the Account Links menu on the left side of the screen.

○   This section allows the user to add and delete records for non-NCAA sports and other groups (e.g., managers, cheerleaders) for which the user would like to track in the CA program.

○   New sports entered on this screen then become available as selections on the Sports Sponsorship screen. After specifying that the institution sponsors these "other sports," individuals who participate in those groups may be entered, and rosters and other reports may be generated.

How to Create an Other Sport

1. Click "Other Sports Setup" in the Account Links menu on the left side of the screen.

2. An Other Sport Setup screen appears.

    a. Enter a three-letter code (created by the user) in the "Sport Code" column.

    b. Enter the new sport in the "Description" column.

3. Once the information for the other sport has been entered, click the **"Save"** button.

How to Delete an Other Sport

1. Click "Other Sport Setup" in the Account Links menu on the left side of the screen.

2. Click the box in the "Delete" column that corresponds to the sport to be removed.

3. Click the **"Save"** button.

    a. Note that after clicking the **"Save"** button, a warning message does not appear before the sport is removed.

    b. If the **"Save"** button is pressed mistakenly, the user will need to add the sport again.

Educational Institutions

○ The Educational Institutions section is accessed by clicking "Educational Institutions" in the Account Links menu on the left side of the screen.

○ This section allows the user to enter information about high schools, preparatory schools, two-year colleges and non-NCAA four-year institutions from which a student-athlete transfers or is recruited. The schools' data may then be used elsewhere in the program (i.e., on the Previous College Attendance screen in the Student-Athletes area and the School screen in the Recruiting area), and does not need to be retyped for each student-athlete who previously attended the school.

○   The user will not need to add the information of NCAA member institutions to the Educational Institutions section. The CA program has the ability to generate the contact information for member institutions from the NCAA membership database. Therefore, NCAA member institutions may be added to a student-athlete's record without the institution being added to the Educational Institutions section by the user.

Inst. Code	Name	City	State	Phone
AJUCO	A Jr. College	Mesa	AZ	(123) 456-7890
ABC	ABC High School	Plainfield	IN	(317) 123-4567

How to Add a School

1.   Click "Educational Institutions" in the Account Links menu on the left side of the screen.

2.   Click the **"New Institution"** button near the top of the screen.

3.   A Detail screen appears.

a.   Enter an "Institution Code" (up to 9 letters and/or numbers).

b.   Enter a "School Type" (either "High School," "Prep School," "Two Year," "Four Year Nonmember" or "Member" options from a drop-down box).

c.   Enter a "Name" (the school's name).

d.   Enter address and phone number information for the institution and athletics department.

e.   Enter the administrator's name and email, and the athletic department's Web page information.

4.   When done entering educational information, click the **"Save"** button.

How to Delete a School

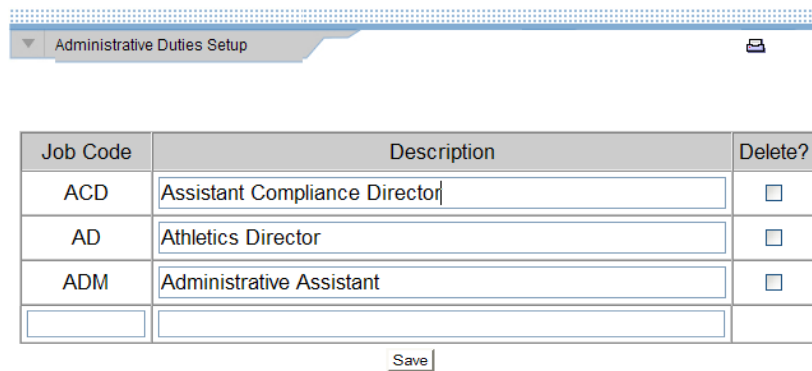1.   Click "Educational Institutions" in the Account Links menu on the left side of the screen.

2   Click the school code to be deleted and the Detail screen for that code appears.

3.   Click the **"Delete Institution"** button.

4.   A dialog box will appear asking, "Are you sure you want to delete this record?"

   a.   Click the **"OK"** button to delete the school and return to the List screen in the Educational Institutions section.

   b.   Click the **"Cancel"** button to keep the school.

Administrative Duties/Roles

○   The Administrative Duties/Roles section is accessed by clicking "Admin. Duties/Roles" in the Account Links menu on the left side of the screen.

○   Information entered in this section is used to create a list of duties on the Administrative Duties screen in the Athletics Personnel section.

How to Add Administrative Duties/Roles

1.   Click "Admin. Duties/Roles" in the Account Links menu on the left side of the screen.

2.   A Administrative Duties Setup screen appears.

Job Code	Description	Delete?
ACD	Assistant Compliance Director	☐
AD	Athletics Director	☐
ADM	Administrative Assistant	☐

Save

   a.   Enter a code (up to five letters) in the "Job Code" column.

   b.   Enter the name of the duty/role in the "Description" column.

3. When done entering information for the administrative duties, click the **"Save"** button.

How to Delete Administrative Duties/Roles

1. Click "Admin. Duties/Roles" in the Account Links menu on the left side of the screen.

2. Click the box in the "Delete" column that corresponds to the duty to be removed.

3. Click the **"Save"** button.

Academic Calendar

○ The Academic Calendar section is accessed by clicking "Academic Calendar" in the Account Links menu on the left side of the screen.

○ Information entered in this section is used on the Detail screen in the Playing Seasons area.

This information must be entered to have the playing and practice seasons section function correctly.

○ Please note that there are Example Calendar Summary and Example Calendar Detail tabs in this section to show the user how academic calendar information can be entered.

Example Calendar Summary	Example Calendar Detail

Date	Description
09/08/2002	Class Begin
10/04/2002	Columbus Day
12/07/2002 – 12/14/2002	Finals
12/15/2002 – 01/12/2003	Christmas Holiday
01/13/2003	Classes Resume
01/22/2003	MLK
03/25/2003 – 03/30/2003	Spring Break
05/07/2003 – 05/14/2003	Finals

How to Add Academic Calendar Information

1. Click "Academic Calendar" in the Account Links menu on the left side of the screen.

2. Click the Detail tab to enter institution-specific calendar information.

3. Click the **"Add Date"** button.

Example Calendar Summary Example Calendar Detail

4.   A box appears to enter date information.

a.   Enter the "Date," "End Date" and "Description" of the activity. If date range is entered using "Date" and "End Date" fields, all dates that fall within the range will appear on the Academic Calendar with the same designated description and type chosen.

b.   Choose the "Type" (i.e., "Classes," "Finals," "Holiday," "Vacation," "Other") from the drop-down box.

c.   Click the **"OK"** button to save the activity and return to the Detail screen in the Academic Calendar section.

d.   Click the **"Cancel"** button to not save the activity and return to the Detail screen in the Academic Calendar section.

5.   Indicate whether the institution's dorms are closed for each calendar activity added.

6.   When done entering academic calendar information, click the **"Save"** button.

How to Delete Academic Calendar Information

1.   Click "Academic Calendar" in the Account Links menu on the left side of the screen.

2.   Click the Detail tab.

3.   Click the **"Delete"** button that corresponds to the calendar activity to be removed.

      a.   Please note that after clicking the **"Delete"** button, a warning message does not appear before the calendar activity is removed.

      b.   If the **"Delete"** button is pressed mistakenly, the user can avoid deleting the activity by clicking off of the screen without clicking the **"Save"** button.

4.   Click the **"Save"** button to delete the calendar activity.

Forms Setup

o   The Forms Setup screen allows the user to track forms that student-athletes need to complete.

o   Forms are created in the Setup area of the CA program and then are available on each student-athlete's Forms screen (within the Student-Athletes area) to indicate the date the forms were completed.

o   Email reminders about the form's due date may be sent to student-athletes.

How to Create Forms to be Tracked for Each Student-Athlete

1.   Click "Forms Setup" in the Account Links menu on the left side of the screen.

2.   A Forms Setup screen appears.

ID	Name	Due Date	Email Reminder?	More Info.
			No ▾	More Info…
			No ▾	More Info…
			No ▾	More Info…

Save | Delete Checked

      a.   Enter the "Name" of the form and the "Due Date" for the form.

      b.   If an email reminder about the form should be sent to student-athletes, choose "Yes" from the "Email Reminder" drop-down box.

c. Click the **"More Info"** button to track "Notes" about the form and to record information regarding the email reminder (if applicable).


- Indicate the number of "Days Prior to the Due Date" that the email reminder should be sent to student-athletes.
- Type the "Reminder Text" that will appear in the email sent to student-athletes.
- Type the email address to which the student-athletes' replies will be sent if they choose to reply to the reminder.
- Click the **"OK"** button to close the More Information screen.
- Click the **"Save"** button on the Forms Setup screen.

3. For information on how to track the forms for student-athletes, see the Student-Athlete General Information area of the User Guide.

How to Delete Forms

1. Click "Forms Setup" in the Account Links menu on the left side of the screen.

2. Click the box in the far right column on the screen to put a check mark in the box that corresponds to the form to be removed.
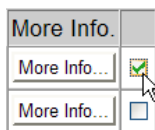
3. Click the **"Delete Checked"** button to remove the form.
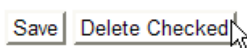
a. Note that after clicking the **"Delete Checked"** button, a warning message does not appear before the form is removed.

b. If the **"Delete Checked"** button is pressed mistakenly, the user will need to add the form again.