# **5 Student-Athlete General Information**

This chapter includes information for adding student-athletes' records in the CA program:



- Accessing Student-Athlete General Information
- Student-Athlete List
- Student-Athlete Detail
- Student-Athlete Guardian
- Student-Athlete Sports
- Student-Athlete Forms

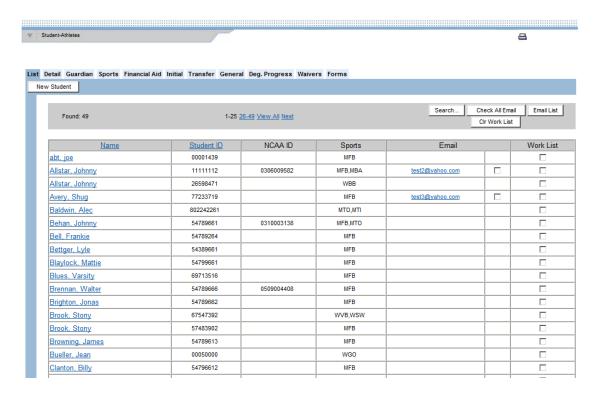
# **Accessing Student-Athlete General Information**

The Student-Athlete General Information screens described in this chapter are accessed by clicking "Student-Athletes" in the Account Links menu on the left side of the screen. The List screen immediately appears, and the Detail, Guardian and Sports screens are accessible after clicking a particular student-athlete's name on the List screen.

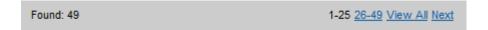


## **Student-Athlete List Screen**

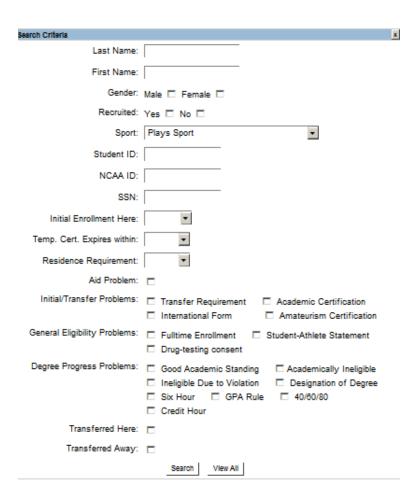
O The List screen shows all of the student-athletes for the selected academic year, including their student ID numbers, NCAA ID numbers, sports and email addresses.



The List screen includes an index that separates the student-athlete records into smaller groupings. When the mouse is placed over the title for each of the smaller groupings, the name of the first student-athlete and the last student-athlete in that grouping appears. The user may choose to view a selected group on the screen (e.g., 1-25).



The List screen includes a "Search" button that allows users to search for student-athletes by many different options (e.g., "Name", "Gender", "Recruited", "Sport", "Student ID", year of "Initial Enrollment Here"). It is also possible to search for student-athletes whose temporary certification or residence requirement will expire in the selected timeframe (e.g., already expired, expires today or up to nine days from today).



- After choosing a search criteria and clicking the "Search" button, it will appear that the records within the subset are the only records in the database. To return to the full list of student-athletes, click the "Search" button on the List screen and then the "View All" button.
- Users may also create of subset of records by creating a Work List. A work list is a temporary selection of student-athletes that the CA user is seeking to access for completion of some related task (e.g., updating degree progress information at the conclusion of a semester, refreshing Eligibility Center status). This feature enables the CA user to access a select group of student-athletes across multiple teams in a manner that is quick and easy to navigate.
- O To view any screen for a student-athlete who is already entered into the CA program, click the student-athlete's name on the List screen of the Student-Athletes area. This will open the Detail screen and allow access to all of the screens in this section for that individual.

#### **How to Find Student-Athletes Not in the List**

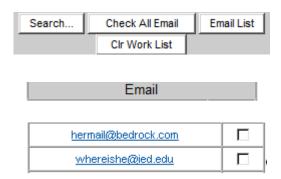
If a student-athlete's name has been added to the CA program but does not appear on the List screen, it is most likely because a sport was not assigned to that student-athlete in that year.

- 1. To view all student-athletes within a particular year (and not only those assigned to a sport), click the **"Search"** button on the List screen.
- 2. In the "Sport" drop-down box, change the "Plays Sport" option to "All."
- 3. Click the "Search" button and the missing name should now appear in the List.
- 4. Click the student-athlete's name and go to the Sports screen to add the student-athlete to a sport.
- 5. Click the **"Save"** button to save the sport.
- 6. Return to the List screen, click the "Search" button, choose the "Plays Sport" option and click the "Search" button. The missing student-athlete will now appear in the List.

#### **How to Email Student-Athletes**

The List screen includes email addresses for student-athletes and allows users to send emails directly from the CA. (This will automatically launch your electronic mail system and put the address into the "To" field.)

- 1. To send an email message to a particular student-athlete from the CA, click the email address of the student-athlete on the List screen.
- 2. To send an email to multiple student-athletes, the user has two options.
  - a. To email all the student-athletes on the List screen:
    - Click the "Check All" button to place a check in the email box for each student-athlete.
    - Click the "**Email List**" button to open a window that lists all of the email addresses chosen.
    - Open the respective email system (e.g., Lotus Notes, Microsoft Outlook).
    - Copy and paste these addresses into the "To" field of the email message. Note that when pasting the names in the "To" field, semi-colons will not appear between the names until clicking the "Check Names" option or clicking the "To" option to the left of the entry box and then clicking "OK."



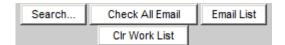
- b. To email individual student-athletes on the List screen:
  - To email one student-athlete, click the email address for that individual.
  - To email multiple (but not all) student-athletes, click the box to the right of each email address for each student-athlete who will receive the email. This will add a check in the box.
  - Click the "Email List" button to open a window that lists all of the email addresses chosen.
  - Open the respective email system (e.g., Lotus Notes, Microsoft Outlook).
  - Copy and paste these addresses into the "To" field of the email message. Note that when pasting the names in the "To" field, semi-colons will not appear between the names until clicking the "Check Names" option or clicking the "To" option to the left of the entry box and then clicking the "OK" button.

#### **How to Create a Work List**

- 1. Click the checkbox in the "Work List" column (on the right-hand side of the list screen) associated with each student to be included in the group.
- 2. Click the name of any one of the individuals from the work list.
- 3. From the "Detail" screen of the selected student-athlete record, the user may move to whatever screen within this student-athlete's record the user intends to view/modify. When the user clicks the left or right arrow at the top of the screen, the system will move to the same screen of another student-athlete from the work list (i.e., circulating through the records of student-athletes who were checked off on the list screen and skip over all others).

#### **How to Clear the Work List**

• Click the "Clr Work List" button on the "List" screen to uncheck all work list checkboxes.

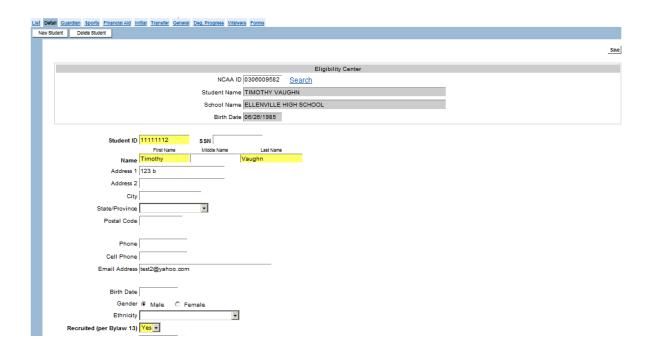


## **Student-Athlete Detail Screen**

- O The Student-Athlete Detail screen is accessed by clicking "Student-Athletes" in the Account Links menu on the left side of the screen and clicking the name of a student-athlete already entered on the List screen. To get to the Detail screen for a new student-athlete, see the section below regarding how to enter a new student-athlete.
- This screen allows the user to enter general information about the student-athlete (e.g., name, address, enrollment dates).
- Note that the yellow data fields are required information and users will be unable to save the screen until all of the yellow data fields have been completed.
- The blue arrows at the top of the page may be used to move to a different student-athlete's Detail screen.

#### How to Add a New Student-Athlete

- 1. Click "Student-Athletes" in the Account Links menu on the left side of the screen.
- 2. Click the "New Student" button located near the top of the List screen. Note that this button also is available on the other screens within the Student-Athletes area.
- 3. The Detail screen appears.



4. Enter the student-athlete's information, ensuring that the required fields (in yellow) are completed.

## For Division I Only

The CA program has two separate fields to track a student-athlete's "recruited" status as it relates to the application of recruiting and financial aid legislation. The Detail screen "Recruited (per Bylaw 13)" field is tied to relevant NCAA legislation for recruitment purposes. To track the application of financial aid legislation, a "Recruited (per Bylaw 15)" field appears on the Financial Aid screen.

Detail Screen: Recruited (per Bylaw 13)

Financial Aid Screen: Recruited (per Bylaw 15)?

5. Click the "Save" button and go immediately to the Sports screen to enter a sport for the student-athlete. Note that if a sport is not entered and the user moves to another screen, when returning to the List screen, the student-athlete's name will not appear in the list. If this occurs, see the "How to Find Student-Athletes Not in the List" section at the beginning of this chapter.



6. After saving the student-athlete's sport, the student-athlete will appear on the List screen

## **How to Delete a Student-Athlete from the CA Program**

WARNING: Deleting records should only be used as a last resort. The CA program provides other options to effectively make records inactive. (For an example of making a previous user of CA inactive, see Chapter 3, "How to Make a User Inactive" section. For an example of removing a student-athlete from standard reports, for a student-athlete who is no longer in a sport, see Chapter 5, "How to Delete a Student-Athlete From a Sport" section.)

The "Delete Student" button removes all of a student-athlete's information for every year in which the student-athlete has been tracked in the CA program. See the section near the end of this chapter for information on how to delete a student-athlete from a sport in order to remove the individual from the current academic year only.

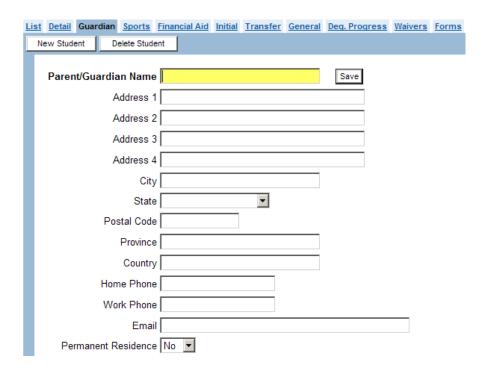
- 1. Click the student-athlete's name on the List screen to bring up the Detail screen for the student-athlete.
- 2. Click the "**Delete Student**" button located at the top of the screen.
- 3. A message will appear asking "Are you sure you want to delete this record?"
  - a. Click the "OK" button to delete the student-athlete. The student-athlete will be permanently deleted from CA and the student-athlete will no longer appear in any academic year.
  - b. Click the "Cancel" button to keep the student-athlete.

## **Guardian Screen**

- The Guardian screen is accessed by clicking "Student-Athletes" in the Account Links menu on the left side of the screen, clicking the name of a student-athlete on the List screen and clicking the Guardian tab.
- This screen tracks the information about a particular student-athlete's parent(s) and/or guardian(s).
- O Please note that any number of parents or guardians may be added; however, only one may be selected as the "Permanent Residence."

#### How to Add a Parent/Guardian for a Student-Athlete

- 1. Click the student-athlete's name on the List screen.
- 2. Click the Guardian tab to open the Guardian screen.



- 3. Complete the fields for the parent or guardian.
- 4. Click the "Save" button.
- 5. An "Add Guardian" button appears on the screen. Click this button to add additional parent/guardian information for the student-athlete.

### How to Delete a Parent/Guardian for a Student-Athlete

- 1. Click the student-athlete's name on the List screen.
- 2. Click the Guardian tab to open the Guardian screen.
- 3. If multiple parent/guardian records have been entered, choose the parent/guardian to be deleted from the "Guardians" drop-down box.
- 4. Click the "**Delete Guardian**" button.
- 5. A message will appear asking "Are you sure you want to delete this record?"

a. Click the "OK" button to delete the parent/guardian for that student-athlete. The guardian will be removed from all academic years and will no longer appear in the "Guardian" field. Click the "Cancel" button to keep the parent/guardian for that student-athlete.

# **Sports Screen**

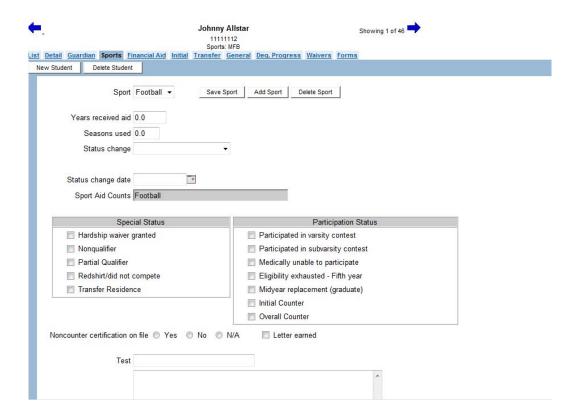
- The Sports screen is accessed by clicking "Student-Athletes" in the Account Links menu on the left side of the screen, clicking the name of a student-athlete on the List screen and clicking the Sports tab.
- This screen allows the user to enter student-athlete sport information for a particular academic year (e.g., sport, years of institutional aid received, seasons of competition used, special status options, participation status options).

## How to Add a Student-Athlete to a Sport

- 1. Click the student-athlete's name on the List screen (or after saving the Detail screen for a new student-athlete) and click the Sports tab.
- 2. Click the "Add Sport" button.
- 3. Click (to highlight) a sport from the list of the institutions' sponsored sports and click the "Save Sport" button.



4. The Sports screen appears for that sport.



5. Complete the fields on the Sports screen (see the following sections) and click the "Save Sport" button.

## How to Add a Student-Athlete to Multiple Sports

- 1. To add a student-athlete to multiple sports, follow Step Nos. 2-4 above for each sport in which the student-athlete participates.
- 2. Note the following about multisport student-athletes:
  - a. Each of the student-athlete's sports is added individually.
  - b. Each sport has a separate Sports screen.
    - To switch between Sports screens, click the drop-down box for the "Sport" field.
    - This drop-down box will include all of the sports that have been added for the student-athlete.
    - Highlight and click the sport to go to the Sport screen for a particular sport.

## **How to Complete Fields on the Sports Screen**

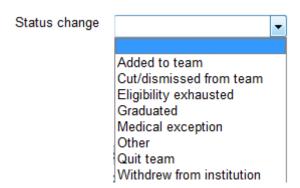
1. The "Years received aid" field tracks the number of years a student-athlete has received institutional financial aid, not including the current academic year (i.e., a freshman student-athlete has not received a year of financial aid so a zero would be entered.)

Years received aid 0.0

- a. This field is updated by the CA program during the Sport Season Startup routine, but it also may be manually adjusted by the user if necessary.
- b. The field will increase by one (or the appropriate fraction of one year if less than a full year of aid was received) for each year that any type of institutional financial aid was entered for that student-athlete on the Financial Aid screen.
- 2. The "Seasons used" field indicates the number of seasons of competition the studentathlete has used, not including the current academic year (i.e., a freshman studentathlete has not used a season of competition so a zero would be entered).

Seasons used 0.0

- a. This field is updated by the CA during the Sport Season Startup routine, but it also may be manually adjusted by the user if necessary.
- b. This field will increase by one for each year that a student-athlete participated in the sport unless one of the items in the "Special Status" area of the Sports screen has been checked. Note that the "Participated in a varsity contest" field is not tied to increasing the "Seasons used" field.
- 3. The "Status Change" field identifies the reason for a change in a student-athlete's status during the academic year (i.e., the student-athlete is no longer an active participant in that sport during that academic year).



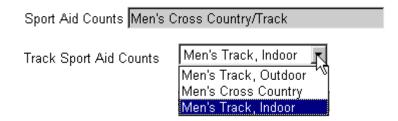
- a. The "Status Change" codes that print on the squad list are used to identify the student-athletes who should not be tested when a team at an institution is selected for drug testing by the NCAA.
- b. The "Status change date" field is also available to note the date of the status change.



4. The "Sport aid counts" field appears for student-athletes in Division I to indicate the sport in which aid will count.



- a. This field is filled in automatically for individuals in one sport or in multiple sports with one hierarchical sport in which aid must count (see Figure 15-3 in the NCAA Division I Manual).
- b. The "Sport Aid Counts" field must be completed by the user for multisport student-athletes in sports not in the hierarchy.
- 5. The "Track Sport Aid Counts" field appears for student-athletes in Division I track and cross country to allow the user to choose the squad list (i.e., indoor track, outdoor track, cross country) in which the aid should appear and count.



6. The "Special Status" fields allow the user to identify the reason that a student-athlete may not use a season of competition.



- a. The codes for "Special Status" fields appear in the "Change in Status" column of the squad list report to assist in identifying active student-athletes for the NCAA drug-testing process.
- b. By checking one of the "Special Status" fields, the "Seasons used" field on the Sports screen will not increase by one for the next academic year during the Sport Season Startup routine.
- c. The following "Status Change" and "Special Status" codes will print in the "Change in Status" column on the squad list (and team roster within ad hoc reporting) if the options are chosen on the "Sports" screen (or the "Degree Progress" screen for two of the options) for a particular student-athlete:

A	Added to team
AI	Academically ineligible (from "Degree Progress" screen)
С	Cut/dismissed from team (from "Status change" box)
D	Departure of Head Coach-Nonparticipant (from "Participation Status" box for Division I men's basketball only)
Е	Eligibility exhausted (from "Status change" box) and/or Eligibility exhausted - Fifth year (from "Participation Status" box)
G	Graduated (from "Status change" box)

Н	Hardship waiver granted (from "Special Status" box)
M	Medical exception (from "Status change" box) and/or Medically unable to participate (from "Participation Status" box)
N	Nonqualifier (from "Special Status" box)
О	Other (from "Special Status" box)
P	Partial qualifier (from "Special Status" box)
Q	Quit team (from "Status change" box)
R	Redshirt/did not compete (from "Special Status" box)
T	Transfer/residence requirement (from "Special Status" box)
V	Ineligible due to violation (from "Degree Progress" screen)
W	Withdrew from institution (from "Special Status" box)
Y	Midyear replacement (graduate) (from "Participation Status" box for Football Bowl Subdivision, Football Championship Subdivision, Division I women's volleyball and Division I women's gymnastics)

6. The "Participation Status" fields are provided and may be important for accurately generating the squad list.

Participation Status	
Participated in varsity contest	
Participated in subvarsity contest	
Medically unable to participate	
Eligibility exhausted - Fifth year	
Departure of Head Coach-Nonparticipant	

- a. "Participated in varsity contest." This field has rules tied to it that apply to football and basketball only.
  - For Division I football and basketball, checking the "Participated in a varsity contest" field will cause some types of financial aid to count in those sports.
  - In Division I, a football or basketball student-athlete is allowed to practice without having to count against the institution's team limit until he competes in a varsity contest (provided that he was not recruited and/or offered financial aid to participate in the sport of football or basketball). If the student-athlete does compete, the varsity contest field must be checked on the Sports screen and the student-athlete will automatically count in the team limit for the sport in which the student-athlete participated.

- b. "Participated in subvarsity contest." A football and basketball student-athlete is allowed to practice and participate in subvarsity contests without having to count against the institution's team limit until he competes in a varsity contest (provided that he was not recruited and/or offered financial aid to participate in the sport of football or basketball). This field may be used to indicate that a student-athlete participated in only a subvarsity contest.
- c. "Medically unable to participate." Check this field for student-athletes who have an illness or injury during a previous academic year which will prevent them from ever participating in athletics (see Bylaw 15).
  - The student-athlete's financial aid will be considered "exempt" from counting towards the team's equivalency or head-count limit.
  - In order for the aid to be exempt and the checkmark to remain in the "Medically unable to participate" box, the user must click the "OK" button to the question that appears regarding the injury or illness occurring prior to the institution's first practice in the sport during the current academic year. On the squad list, the athletics aid a student-athlete receives will be included in the total box for "Athletics Grant" and in the equivalent award for revenue distribution purposes.
  - The "total countable aid" received by this student-athlete will count for purposes of minimum requirements legislation and, therefore, will be included in the total box for "Total Countable Aid" on the squad list.
- d. "Eligibility exhausted Fifth year." Check this field if the student-athlete has exhausted eligibility in a sport during the previous academic year.
  - The student-athlete's financial aid will be considered "exempt" from counting towards the team's equivalency or head-count limit.
  - On the squad list, the athletics aid a student-athlete receives will be included in the total box for "Athletics Grant" and in the equivalent award for revenue distribution purposes.
  - The "total countable aid" received by this student-athlete will count for purposes of minimum requirements legislation and, therefore, will be included in the total box for "Total Countable Aid" on the squad list.
- e. "Midyear replacement (graduate)." This field is applicable only to those student-athletes who participate in Football Bowl Subdivision, Football Championship Subdivision, Division I women's volleyball or Division I women's gymnastics.

- Click this field for a student-athlete who receives the financial aid of a counter who graduates at midyear. This will exempt the replacement from becoming a counter for that academic year (see Bylaw 15).
- For a Football Bowl Subdivision or Football Championship Subdivision student-athlete, the replacement will automatically count against the initial-counter limit in the following academic year.
- f. "Initial counter." This field only appears on the Sports screen for Football Bowl Subdivision and Football Championship Subdivision student-athletes.
  - Click this field to identify whether a Bowl or Championship Subdivision student-athlete is an initial counter.
  - Note that if this field is not checked, the CA will be unable to accurately track whether the initial-counter limits for football have been exceeded.
- g. "Participating in countable activities during the championship segment." This field is applicable to student-athletes participating in Division I baseball (and is only visible on the baseball sport screen).
  - Click this field for a student-athlete who should be counted towards the baseball squad size limits.
- h. "Departure of Head Coach-Nonparticipant." This field is applicable only to those student-athletes who participate in Division I men's basketball (and is only visible on the men's basketball sport screen).
  - Click this field to identify a student-athlete who receives athletically related institutional financial aid in academic years following the departure of a head coach. This will exempt the student-athlete from becoming a counter for that academic year. (See Bylaw 15).
- 8. The "Noncounter certification on file" field allows the user to indicate whether the noncounter certification form is on file for a student-athlete.

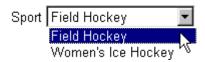
Noncounter certification on file C Yes C No C N/A

**Note:** There are optional noncounter forms available in Standard Reports section of the system (see Chapter 12 Standard Reports).

- 9. The "Letter earned" field is provided as an option for users who want to track this information, and it is not used in any other area by the CA.
- 10. The "Overall Counter" field is automatically updated with a check mark in the check box once countable aid is awarded to a student-athlete on the financial aid screen.

## How to Delete a Student-Athlete From a Sport

- 1. Click the student-athlete's name on the List screen to bring up the Detail screen for the student-athlete. **Do not click the "Delete Student" button or all of the student-athlete's information will be removed for all years.** Deleting a student-athlete's sport will remove him or her from the sport in the current year, but the student-athlete's name and information will remain in previous years.
- 2. Click the Sports tab to bring up the Sports screen.
- 3. If the student-athlete is a multisport student-athlete, choose the appropriate sport from the Sports drop-down box.



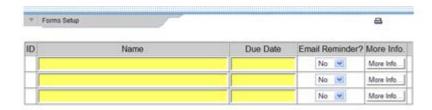
- 4. Click the "**Delete Sport**" button located next to the "**Add Sport**" button.
- 5. A message will appear asking "Are you sure you want to delete this record?"
  - a. Click the "OK" button to delete the student-athlete's sport. The student-athlete will be removed from the selected academic year and will no longer appear on the student-athlete list for that year (unless he or she is assigned to another sport). If the student-athlete has information in previous years, that information will still remain.
  - b. Click the "Cancel" button to keep the student-athlete's sport.

## **Student-Athlete Forms**

- o The Forms screen allows the user to track forms that student-athletes need to complete.
- o Forms are created in the Setup area of the CA and then are available on each student-athlete's Forms screen to indicate the date it was 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 "Setup" and then "Forms Setup" in the Account Links menu on the left side of the screen.
- 2. A Forms Setup screen appears.



- 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 studentathletes.
- 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.
- d. Click the "Save" button on the Forms Setup screen.

#### **How to Track Forms for Each Student-Athlete**

- 1. In the Eligibility area of the CA, click a student-athlete's name on the Student-Athlete List screen.
- 2. Click the Forms tab.
- 3. A screen appears with the forms that the user created in the Setup area of the CA.



- a. If the student-athlete's form has been received, choose "Yes" from the drop-down box in the "Received" column.
- b. Enter the "Date Received."
- c. The CA indicates in the "Reminder Sent" field whether the email was sent to student-athletes (if applicable).
- d. Click the "Notes" button to enter notes if needed.
- e. Click the "Save" button.