Strategic Initiatives
Conference Grant Program
Electronic Forms User’s Guide

(Revised February 2016)
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Introduction

The NCAA Division III Strategic Initiatives Conference Grant Program Electronic Forms User’s Guide is intended to assist in completing the annual Impact and Request Forms that are due not later than July 15 each year.

The user guide will provide information outlining how to:

• Log on to the electronic forms submission system.
• Enter, save and edit information.
• Submit the Impact Form, for funds used during the previous academic year, using a signature page for the commissioner and the individual to whom the commissioner reports.
• Submit the annual Requisition Form (not available until May each year) for the upcoming academic year.
• Print a PDF copy of the Impact Form.

Also, please note the following features of the electronic forms program:

• The program allows users to start and stop so that it is not necessary to complete the entire form in one setting.
• Save your work often.
• Much of the information that conference offices will submit is available via a “drop-down box” that requires the user to merely select pre-approved uses of funds from the various tiers.
• The program includes an alert system that notifies the user if they failed to provide required information and/or if the user reported the use of more funds than what the conference was allocated.
• When entering dollar amounts, do not include a dollar sign ($).

For assistance, please do not hesitate to contact Jay Jones (jkjones@ncaa.org) or Debbie Brown (dbrown@ncaa.org).
1. **Logging On**

   ![Figure 1 – Login screen](image)

   1. The Conference Grant Program is available on NCAA.org:
      - Division III → Division III Resources → Division III Grants, Programs and Scholarships → Conference Grant Program (Strategic Initiatives Grant) → The program link is located within the initial verbiage on that page

   2. The Login screen as shown in Figure 1 will appear.

   3. Enter your user ID and password in the fields shown in **Figure 1**.

   4. Click **Login**.
2. **Entering Information in to the Impact Form**

![Figure 2 - Available Forms screen](image)

To enter new information into the latest Impact form:

- Click the **Edit Form** link (see **Figure 2**).

The form shown in **Figure 3** opens.
Figure 3 - Editable Impact form

<table>
<thead>
<tr>
<th>Name of tier</th>
<th>Allocation categories</th>
<th>Expenditure totals</th>
<th>PDF link</th>
</tr>
</thead>
</table>

The Conference has retained all relevant receipts.

Please justify any discrepancy in the amount received and amount spent in this tier. As a reminder, grant fund balances exceeding $1,000.00 across all three tiers must be returned to the NCAA. Before you complete the signature page for this impact form (and based on your total fund balance across all three tiers) you will be prompted with a notice to either return funds to the NCAA, or to detail your plan to use the fund balance.
3. Help

The Web Form application provides popup descriptions for the tier titles and the allocation categories.

To display the popup help for either the tier title or the allocation categories, do one of the following:

- Hover your mouse over the tier title or the allocation categories, as shown in Figures 4 and 5.

**Figure 4** – Tier title popup help

**Figure 5** – Allocation category popup help

**Tip:** Use this type of popup help when you want information quickly.
• Click either the tier title or the allocation category. The popup help is shown in Figures 6 and 7.

![Tier title popup help](image)

**Figure 6 – Tier title popup help**

![Allocation category popup help](image)

**Figure 7 – Tier title popup help**

NOTE: You can move and resize these popup windows as shown in Figures 8 and 9.

• Click the X to close the window (see Figure 7).
Figure 8 shows the arrows that appear when you place the mouse arrow in the top gray band. Click the arrows and move the popup help window in any direction.

Figure 8 –Popup help

Figure 9 shows the arrows that appear when you click and grab the lower right corner of the window. Move the arrows in any direction to resize the window.

NOTE: You may need to resize the window to see the entire contents of the window.

Figure 9 –Popup help
4. Impact Form Sections

Each of the tiers contain allocation categories, containing tables of expenditure information and the total money spent for each allocation category. [NOTE: when entering dollar amounts do not include a dollar sign ($).]

When you create a new form or open an existing form, Tier 1 is automatically displayed.

Figure 10 provides a close-up view of the SAAC allocation category in Tier One.

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount Spent:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Approved Use</td>
<td>Description of Use</td>
</tr>
<tr>
<td>Conference SAAC t-shirts</td>
<td>Purchased SAAC t-shirts.</td>
</tr>
<tr>
<td>Increasing committee size</td>
<td>Added five members.</td>
</tr>
<tr>
<td>Conference SAAC logo development</td>
<td>Designed a beautiful new logo with all my member institutions.</td>
</tr>
</tbody>
</table>

**Figure 10 – Allocation section**

Most allocation categories contain the types of information shown in Figure 10. However, this information may vary slightly, depending on the allocation category.

5. Totals Section

This section (see Figure 11) displays the total money spent.

<table>
<thead>
<tr>
<th>Amount Spent:</th>
<th>$0.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Amount Spent</td>
<td>$4,200.00</td>
</tr>
<tr>
<td>Amount Received</td>
<td>$17,918.04</td>
</tr>
<tr>
<td>Balance</td>
<td>$15,718.04</td>
</tr>
</tbody>
</table>

**Figure 11 – Totals section**

**NOTE:** If the Total Amount Spent exceeds the Amount Received (see Figure 12), an error will displayed similar to Figure 13. You cannot proceed until you correct the error and both numbers match or the Total Amount Spent is less than the Amount Received.

**Figure 12 – Discrepancy between Amount Spent and Amount Received**
Follow the directions on the screen before attempting to correct the error. Then enter an explanation for the discrepancy into the box shown in Figure 14.

NOTE: You can check your spelling by clicking the link shown in Figure 14.

6. Receipt Checkbox

At the bottom of the editable form is a checkbox noting the conference has retained all relevant receipts. (see Figure 15).
Available Forms

Buttons

- **Available Forms Page** – click this button, as seen in Figure 15, and a table displaying all available forms appears (see Figure 16).

![Available Forms Table]

**Figure 16** – Available Forms screen

See the "Adding, Editing, or Deleting Information on an Impact Form" in the next section for more information about editing or deleting information within this table.

- **Save** - click this button to save any changes you make to any information.

**NOTE**: Tier 1 displays automatically when you first open the Impact form screen.

- **Tier 2**
- **Tier 3**
- **Tier 4**
- click these buttons to display a different tier.
7. **Adding, Editing, Copying or Deleting Information on the Impact Form**

To add information: The Web Form application lets you add a new line of information to each allocation category or revise existing information in each section, one line at a time by clicking on the “Add Pre-Approved Use” button (see Figure 17).

![Figure 17 – Action column of Impact form](image)

The Add/Modify Approved Usage popup screen opens (see Figure 18).

1. Click the arrow shown in Figure 18 to open the Pre-Approved Use list (see Figure 18).

![Figure 18 – Add/Modify Approved Use drop down list](image)

2. Select an item from the drop down list.

**TIP:** You can type the first letter of a selection instead of selecting it from the list. However, this only works for selections actually in the list. For example - you could type "I" in the Pre-Approved Use box and display Increasing committee size instead of clicking the item within the list.
3. If you select “Other” from the pre-approved use list, you will be prompted to enter a description in the Pre-Approved Use “Response Required” box (see Figure 20). For any selection besides “Other”, you will not have to enter a text response.

4. Enter the dollar amount spent on the initiative in the Amount Spent box.

5. Click Save.

6. Repeat steps 1-5 for each expenditure line.
NOTE: Clicking Save (step 5) does not submit the information to the NCAA. Clicking Save stores the information for future use by the conference.

When you click Save, the Available Forms screen reopens and displays one of the following:

- If you clicked the Edit link - the information you selected will be changed
- If you clicked the Copy link - the new line you just created will be added to the table (see Figure 21).

Figure 21 – Add/Modify Approved Usage popup screen
To delete an individual line:

1. Click the Tier button to select the tier containing the information you want to delete.
2. Select the line you want to delete.

![Figure 22 – Action column of Impact form](image)

3. Click the **Delete** link as shown below:

![Figure 23 – Action column of Impact form](image)

The popup dialog box as shown in **Figure 24** opens.

![Figure 24 – Delete popup dialog screen](image)

4. Do one of the following:
   - Click **OK** to delete the information.
   - Click **Cancel** to return to the previous screen without deleting the information.
8. Adding Information

Figure 25 – Allocation section

NOTE: Figure 25 shows how the screen will look after you add new information.
Click the PDF icon shown in Figure 26 and a pdf version of the Editable Impact form opens. This PDF will include the information entered into the program that has been saved up to that point in time.

**Figure 26 - Editable Impact form – partial PDF**
10. **Adobe Toolbar**

At the bottom of the pdf form window is an Adobe toolbar:

- To close the window, click the red X in the upper right corner of the window:

Figure 28 – Adobe toolbar
11. **Viewing Historical Information**

To view historical information previously submitted by your conference, do the following:

- Click the date you want to view as shown in **Figure 29**.

The associated form opens in pdf format:

**Figure 29** – Available Forms screen

**Figure 30** – Historical form pdf
12. Submitting Completed Forms

After you have entered all information on Tiers 1 – 3, go to the Tier 4 screen. On the Tier 4 screen, you will see the fund balance. Depending on the value of the balance (over or under $1,000), the system will prompt you to either submit your plan for future funds or return funds.

Do the following:

1. Click Submit/Signatures after adjusting the fund balance.

You are then prompted to finish entering any required information.

2. Enter information into any empty required fields.

**NOTE 1:** If all fields have been populated with information, you will be directed to the Signatures screen.

**NOTE 2:** After you submit a form, that form cannot be edited or revised.

**Signatures Screen**

The last step in the submission process is to send out a request for signatories to sign off on your plan.

![Signatory information](image)

![Email link](image)

**Figure 31 – Signatures screen**

1. On the Signatures screen, enter all required information for each identified representative.

**NOTE:** Signatures are required for the conference commissioner (identified as ‘conference executive’) and the person to whom the commissioner directly reports. The remaining four representatives will receive the report; however, no signature will be required for those four.
2. Click **Save**. A message appears, confirming that the signatory information has been saved.

![Fig 32](image)

**Figure 32** – Signatures screen – information has been saved

The system creates an email and sends the email to each of the two required signatories with a link to the conference submission. This email asks the signatory to accept or reject the conference submission. If signatories reject the submission, they can also submit comments.

3. (Optional) Click **Submit**. Click this button if you did not see the message shown in **Figure 32**.

4. (Optional) Click **Email All**. Click this button if the email messages were not sent out or received.

**NOTE 1:** The requisition and impact submissions are separate transactions. Individuals will receive a separate signature verification for both the requisition and impact form.

**NOTE 2:** Use the Email link shown in **Figure 31** for emails that were not delivered or were not received.
13. **Submitting the Requisition Form**

To submit a requisition form:

1. Click the Available Forms screen as illustrated in Figure 33.

![Figure 33 – Available Forms screen](image)

2. Then click the “Edit Form” under the Requisition Form.

The Tier 1 Allocation Basis screen opens (see Figure 34).

![Figure 34 – Allocation Basis screen](image)
3. (Optional) Click the number link shown in Figure 34 to change the number of conference members included in this allocation.

The popup shown in Figure 35 opens.

4. (Optional) Enter the name(s) of a member or members you want to add into the box shown in Figure 35A.

5. (Optional) Delete a member by clicking the Delete link to the right of that member.

6. Click one of the following:
   - Add – to add a member. You must click Add for each member you want to add.
   - Close – to close the window.

The system returns you to the screen shown in Figure 34.

7. Click the Tier 2 and Tier 3 buttons to view the Allocation Basis for conferences on those tiers.

8. Click the Tier 4 button (see Figure 34).

The screen shown in Figure 34 opens.
**NOTE:** You must indicate whether or not you want to take the full allocation by entering a note in the box shown in Figure 36.

- You have the option of entering an amount less than the allocation if you decide not to take the full amount.

9. Click the **Submit/Signatures** button to display the list of people designated to sign off on the allocation request.
**Figure 37** – Tier Allocation Basis screen

Note: The contact information in the screen shown above is fictitious.

10. Click **Submit** to submit the allocation request.

An email message is automatically sent to all people designated to sign off on the allocation request.