

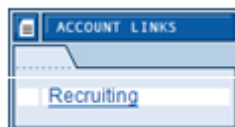
## 8 Recruiting Information

This chapter includes information regarding the Recruiting area of the CA program, including:

- Accessing Recruiting Information
- List Screen
- Detail Screen
- Years Screen
- Guardian Screen
- Sports Screen
- School Screen
- Correspondence Screen
- Telephone Log Screen
- Contacts/Evaluations Screen
- Official Visit Screen
- Unofficial Visits Screen
- National Letter of Intent (NLI)/Offer Screen
- Recruiting Calendars

### Accessing Recruiting Information

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



## List Screen

- The List screen shows all of the prospective student-athletes for the selected academic year, including their school, sports, class, ranking and email.

Name	School	Sports	Class	Ranking	Email
<a href="#">0001_PSA</a>	Washington High	MBA	JUNIOR	Top 10	<a href="mailto:PSA1@email.edu">PSA1@email.edu</a>
<a href="#">0002_PSA</a>	Arlington H.S.	WBB	SENIOR	Top 20	<a href="mailto:PSA2@email.edu">PSA2@email.edu</a>
<a href="#">0003_PSA</a>	Baxter High School	MIH	JUNIOR	Top 5	<a href="mailto:PSA3@email.edu">PSA3@email.edu</a>
<a href="#">0004_PSA</a>	Butler High School	WGO	JUNIOR	Top 20	<a href="mailto:PSA4@email.edu">PSA4@email.edu</a>

- The List screen includes an index that separates the prospective 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 prospective student-athlete and the last prospective student-athlete in that grouping appears. The user may choose to view a selected group on the screen (e.g., 1-25).

Found: 36      1-25 [26-36](#) [View All](#) [Next](#)

- The List screen includes a "Search" button that allows users to search for prospective student-athletes by last name, first name, gender, coach's ranking, status ("Active" or "Inactive"), state and/or class year. To open the search criteria click the "**Search**" button. The user may also filter by sport to see only the prospective student-athletes in that particular sport.

**Search Criteria**

Last Name:

First Name:

Gender: Male  Female

Sport:

Coach's Ranking:

Status:

State:

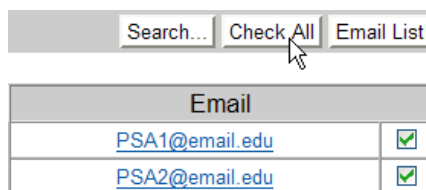
Class:

- After choosing a search criteria and clicking the **"Search"** button at the bottom of the Search Criteria box, only the records within the subset will appear. To return to the full list of prospective student-athletes, click the **"Search"** button on the List screen and then select 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 prospective student-athletes that the CA user is seeking to access for completion of some related task (e.g., updating phone logs, correspondence, etc.). This feature enables the CA user to access a select group of prospective student-athletes across multiple teams in a manner that is quick and easy to navigate.
- To view any screen for a prospective student-athlete who is already entered into the CA program, click the prospective student-athlete's name on the List screen of the Recruiting area. This will open the Detail screen and allow access to all of the screens in this section for that individual.

### How to Email Prospective Student-Athletes

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

1. To send an email message to an individual prospective student-athlete from the CA program, click the email address of the prospective student-athlete on the List screen.
2. To send an email to multiple prospective student-athletes, the user has two options:
  - a. To email all of the prospective student-athletes on the List screen:
    - Click the **"Check All"** button to place a check mark in the email box for each prospect.

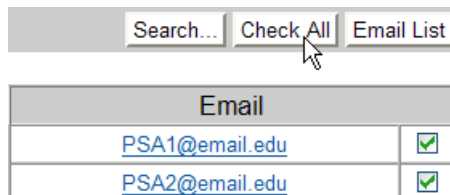


- Click the **"Email List"** button to open a window that lists all of the email addresses chosen.
- Open the respective electronic mail system (e.g., Lotus Notes, Microsoft Outlook).
- Copy and paste these addresses into the "To" field of the email message. [Note: When pasting the names in the "To" 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 specific prospective student-athletes on the List screen:

- Click the box to the right of each email address for each prospective student-athlete who will receive the email. This will add a check mark in the box.



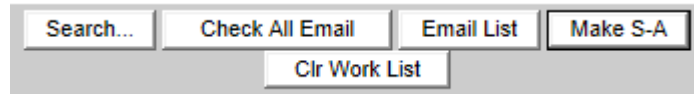
- Click the "**Email List**" button to open a window that lists all of the email addresses chosen.
- Open the respective electronic mail system (e.g., Lotus Notes, Microsoft Outlook).
- Copy and paste these address into the "To" field of the email message. [Note: When pasting the names in the "To" field, 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."]

### 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 prospective student-athlete record, the user may move to whatever screen within this prospective 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 prospective student-athlete from the work list (i.e., circulating through the records of prospective 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.

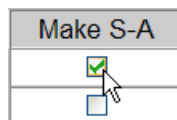


### Information Regarding Transferring Prospects to the Student-Athletes Area

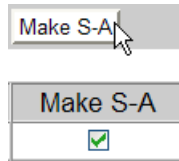
1. The List screen includes an option for transferring prospective student-athlete information from the Recruiting area to the Student-Athletes area where the user can track general, financial aid and eligibility information about that student.
2. Several data fields are carried over when a prospective student-athlete is transferred to the Student-Athletes area. Examples of fields that transfer are name, parent/guardian information, test scores, NCAA Eligibility Center information, school information and recruited status.
3. **Before transferring a prospective student-athlete to the Student-Athletes area, it is very important that the academic year in which the user wants to add the individual as a student-athlete has been set up using the New Academic Year function in the Tools area.** When prospective student-athletes are transferred, they automatically are added to the last academic year that was set up in the CA program. For example, if there are prospective student-athletes in the Recruiting area for the current academic year and they will be student-athletes for the next academic year, the user must ensure the next academic year has been setup in the CA program.
4. For the "Make S-A" check box to appear on the Prospective Student-Athlete List screen, the user must complete the "School Student ID" field for the prospective student-athlete. The "School Student ID" field is located on the Detail screen for each individual.

### How to Transfer Prospective Student-Athletes to the Student-Athletes Area

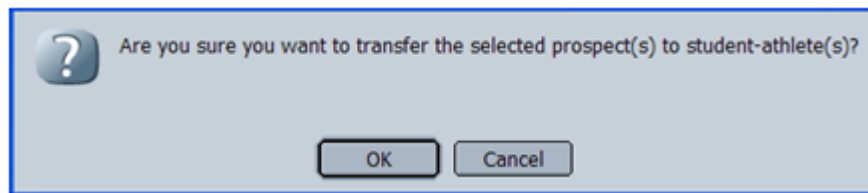
1. To transfer a prospective student-athlete from the Recruiting area to the Student-Athletes area, click the box in the "**Make S-A**" column at the far right of the screen to place a check mark in the box. [Note: Multiple prospective student-athletes may be transferred at one time by placing check marks in the "Make S-A" boxes for all individuals to be transferred.]



2. Click the **"Make S-A"** button below the "Make S-A" column.



3. A message will appear asking "Are you sure you want to transfer the selected prospect(s) to student-athlete(s)?"



- a. Click the **"OK"** button to transfer the name and other transferable information for the prospective student-athlete(s) to the Student-Athletes area. Note that prospective student-athlete information remains in the Recruiting area after the transfer and the "Make S-A" check box is removed.
- b. Click the **"Cancel"** button if the prospective student-athlete information should not be transferred to the Student-Athletes area.

## Detail Screen

- The Detail screen is separated into four areas: Profile, Eligibility Information, User-Defined Fields and Comments.
- 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 prospective student-athlete.

### How to Add a Prospective Student-Athlete

1. Click the **"New PSA"** button.
2. A Detail screen appears.

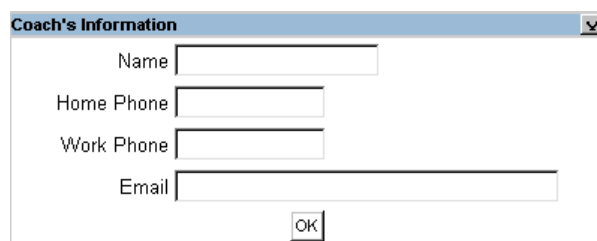
3. The Profile section of the Detail screen contains general information for the prospective student-athlete, including "Name," "SSN" (Social Security Number), "School Student ID", "NCAA ID," "Gender," "Ethnicity," "Recruited," "Status" (i.e., "Active" or "Inactive"), "International Student," "Class" and "Recruit Type" (either "High School," "Two Year," "Four Year," "Post Graduate" or "Other").

The screenshot shows a web-based form titled "Profile" for a "New PSA". The form is organized into several sections:

- Name:** Three input fields for First, Middle, and Last names, followed by a "Save" button and a "Coach Info..." button.
- SSN:** A single input field.
- School Student ID:** An input field with a note "(Required only to make S-A)".
- NCAA ID:** An input field with a "Search for ID" button.
- Gender:** A dropdown menu.
- Ethnicity:** A dropdown menu.
- Recruited:** A dropdown menu.
- Status:** A dropdown menu.
- Class:** A dropdown menu.
- Recruit Type:** A dropdown menu with options for "High School" and "Two Year College".
- Birth Date:** A date input field.
- International Student:** A dropdown menu.
- Class Rank:** An input field.
- State PSA is From:** A dropdown menu.
- Graduation Date:** Two date input fields.
- Email:** A long text input field.
- Coach's Ranking:** An input field.
- Cell Phone:** An input field.
- Contact Permission Granted:** A dropdown menu.
- Contact Permission Date:** A date input field.
- Financial Agreement Signed Date:** A date input field.
- Counselor:** Two input fields for Name and Phone.

- a. The "Class" field (e.g., "Freshman," "Sophomore") is used by the CA program to determine whether it is permissible for contacts and evaluations to occur, correspondence to be sent and official visits to occur.
- It is important to note that when the Recruiting Startup function in the Tools area is used and a prospective student-athlete is rolled over to appear in the Recruiting area for the next academic year, the "Class" field will increase automatically and the user will not need to manually adjust the field in the new academic year.
  - The "Class" field is included in the search criteria options (when clicking the "Search" button at the top of the screen) that may be used when searching by (or filtering) a particular group of prospective student-athletes. Choosing to search by "Senior," for example, will show only seniors on the List screen.
- b. The "School Student ID" field must be completed in order for a "Make Student-Athlete" check box to appear on the Prospective Student-Athlete List screen to be able to transfer a prospective student-athlete to the Student-Athletes area.
- c. The "NCAA ID" field allows the user to import the identification number assigned to the prospective student-athlete from the NCAA Eligibility Center.

- d. The "Status" field is a required field and tracks whether the prospective student-athlete is an "Active" or "Inactive" recruit.
- This field is included in the search criteria options (when clicking the "Search" button at the top of the screen) that may be used when searching by (or filtering) a particular group of prospective student-athletes. Choosing to search by "Active" prospects will eliminate those individuals who are no longer being recruited and have been marked "Inactive".
  - The "Status" field is also used within the Ad Hoc Reporting section if the user wants to produce a report of only those prospects who are actively being recruited. The field within ad hoc reporting is "PSA General – Status Indicator."
  - Choosing "Inactive" on the "Status" field is also an alternative to deleting the prospective student-athlete from a sport or from the system permanently.
- e. The "State the PSA is From" field is also a field that is included in the search criteria options when clicking the "Search" button at the top of the screen.
- f. The "Coach's Ranking" field allows the user to enter a ranking system for prospects that may have been developed by the institution. This field is also included in the search criteria options when clicking the "Search" button at the top of the screen.
- g. Click the "**Coach Info**" button near the top of the screen to enter information about the prospective student-athlete's coach, and click the "**OK**" button when done.



The image shows a software dialog box titled "Coach's Information". It features a title bar with a small downward-pointing arrow on the right. Below the title bar, there are four text input fields arranged vertically, each with a label to its left: "Name", "Home Phone", "Work Phone", and "Email". The "Email" field is notably wider than the others. At the bottom center of the dialog box, there is a small button labeled "OK".

4. The Eligibility Information section contains information regarding "IRL Date," "Date registered with NCAA Eligibility Center," "Amateurism Certification Questionnaire was completed by the Eligibility Center," "Final Academic Certification from Eligibility Center," "High School GPA," "Two Year College GPA," "Transcript Received," "Qualifier Status," "Sum SAT," "Sum ACT," "Seasons Used" and "Medical Exam Date."



- a. The "IRL Date," "Amateurism Certification Questionnaire was completed by the Eligibility Center," "Final Academic Certification from Eligibility Center" and "Date registered with NCAA Eligibility Center" fields track current NCAA legislation that require a high school or preparatory school prospective student-athlete to register with the NCAA Eligibility Center and be placed on the Institutional Request List (IRL) along with other certifications and/or transcripts received prior to being provided an official visit or receiving a written offer of athletically related financial aid. The Detail screen houses this information and carries it over to the appropriate fields on other screens.
- b. The "Medical Exam Date" field tracks the date a prospective student-athlete who was recruited in the sport applicable to this NCAA legislation, has undergone a medical examination prior to first-time participation in any voluntary individual workouts pursuant to the safety exception or try-out exception in basketball. When this field is completed and the prospective student-athlete is subsequently designated to be rolled over to the Student-Athlete area (see "How to Transfer Prospective Student-Athletes to the Student-Athlete Area" section in this chapter), the field is automatically entered in the "Medical Exam/History" field located on the student-athlete's General screen.
- c. To add multiple test scores or more detailed score information, click the "**Test Scores**" button.

- d. Click the **"Add New Score"** button, and enter the test-score information. Click the **"Add New Score"** button again to add more scores. The CA program will combine the highest score in each subsection. The manual entry option is only available if you have not previously entered data in the Test Scores screen.
  - e. Click the **"OK"** button to close the "Test Score" box.
  - f. The "Combined Score" will be entered in the "Sum SAT" and/or "Sum ACT" fields in the Eligibility Information section of the Detail screen.
  - g. To delete detailed test-score information, click the **"Test Scores"** button, click the **"Delete Score"** link and click the **"OK"** button.
5. The User-Defined Fields section will only have data items if the user has created user-defined fields for the Prospective Student-Athlete Detail screen.

User Defined Fields	
HEIGHT	<input type="text"/>
WEIGHT	<input type="text"/>
POSITION	<input type="text"/>
PHYSICAL	<input type="text"/>

- a. Note that user-defined fields are created by the user to store information that is not tracked by the CA program.
  - b. The fields must be created in the User-Defined Fields section of the Setup area in the "Prospective Student-Athlete General" table before being available on this screen.
  - c. The user-defined fields in the picture above are sample fields created for demonstration purposes.
6. The Comments section is provided for the user to track comments about a prospective student-athlete.
- a. Enter comments regarding the prospective student-athlete, if desired.

Comments	
Comments	<input type="text"/>

- b. Note that there are "Comments" or "Notes" fields available on most screens within the Recruiting area so that users can track comments specific to the area addressed by that particular screen.
7. Click the **"Save"** button.
  8. The prospective student-athlete will appear on the List screen.

## Guardian Screen

- The Guardian screen tracks the information about a particular prospective student-athlete's parent(s) and/or guardian(s).
- Please note that any number of parents or guardians may be added for a particular prospective student-athlete; however, only one may be selected as the "Permanent Residence."

The screenshot shows the 'Guardian' tab selected in the software interface. The form contains the following fields:

- Parent/Guardian Name (with a Save button)
- Address 1
- Address 2
- Address 3
- Address 4
- City
- State (dropdown menu)
- Postal Code
- Province
- Country
- Home Phone
- Work Phone
- Email
- Permanent Residence (dropdown menu, currently set to 'No')
- Comments (text area)

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

1. Click the prospective 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/guardian.

Note: Including the permanent resident information allows the user to more easily direct communications to the student-athlete's home. See Ad Hoc Reporting – Student Mailing Labels (Primary Residence).

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 prospective student-athlete, if necessary.

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

1. Click the prospective 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 prospect. The guardian will be removed permanently and will no longer appear in the "Guardian" field.
  - b. Click the **"Cancel"** button to keep the parent/guardian for that prospect.

## Sports Screen

- The Sports screen allows the user to put a check mark in the sport(s) in which information will be added for this particular prospective student-athlete. The sport(s) that are chosen will dictate the NCAA legislation applied by the CA program.
- Only the sports sponsored by the institution appear in the list of sports.

Women's Sports	Men's Sports
Field Hockey <input type="checkbox"/>	Baseball <input type="checkbox"/>
Lightweight Rowing (P and P only) <input type="checkbox"/>	Football <input checked="" type="checkbox"/>
Women's Basketball <input type="checkbox"/>	Men's Basketball <input type="checkbox"/>
Women's Bowling <input type="checkbox"/>	Men's Cross Country <input type="checkbox"/>
Women's Cross Country <input type="checkbox"/>	Men's Fencing <input type="checkbox"/>
Women's Equestrian <input type="checkbox"/>	Men's Golf <input type="checkbox"/>
Women's Golf <input type="checkbox"/>	Men's Ice Hockey <input type="checkbox"/>
Women's Gymnastics <input type="checkbox"/>	Men's Lacrosse <input type="checkbox"/>
Women's Ice Hockey <input type="checkbox"/>	Men's Rifle <input type="checkbox"/>
Women's Lacrosse <input type="checkbox"/>	Men's Skiing <input type="checkbox"/>
Women's Rifle <input type="checkbox"/>	Men's Soccer <input type="checkbox"/>
Women's Rowing <input type="checkbox"/>	Men's Swimming <input type="checkbox"/>
Women's Rugby <input type="checkbox"/>	Men's Tennis <input type="checkbox"/>

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

1. Click the "**prospective student-athlete's name**" on the List screen.
2. Click the "**Sports**" tab to open the Sports screen.
3. Click the appropriate box(es) to add a check mark in the box(es) for the sport(s) in which the prospective student-athlete is being recruited.
4. Click the "**Save**" button.

### **How to Delete a Prospective Student-Athlete from a Sport**

1. Click the "**prospective student-athlete's name**" on the List screen.
2. Click the "**Sports**" tab to open the Sports screen.
3. Click the box next to the sport(s) in which the prospective student-athlete is being removed.
4. Click the "**Save**" button.
5. Note that if the message "Error saving sports" appears, the prospective student-athlete has a contact, evaluation or telephone call associated with that sport. The user will not be able to delete the sport while these items are assigned to the prospective student-athlete. The user may choose the "Inactive" selection on the "Status" field in order to keep a historical record of activities of the prospective student-athlete.

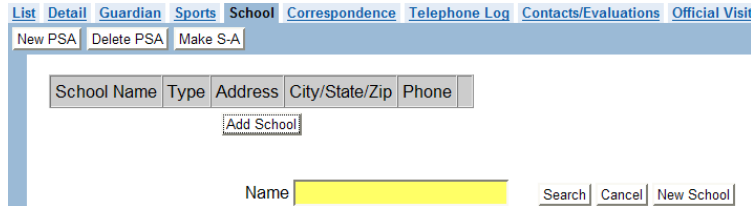
## **School Screen**

- The School screen allows the user to indicate the school(s) that the prospective student-athlete has attended.
- The CA program is able to search the NCAA membership database; therefore, NCAA schools will not need to be entered into the system since all NCAA member institutions are included in the list of schools automatically.
- For non-NCAA school(s) entered into the CA program, that school's information is saved in the Educational Institutions section of the Setup area and does not need to be entered again.

### **How to Add a School for a Prospective Student-Athlete**

1. Click the "**prospective student-athlete's name**" on the List tab.
2. Click the "**School**" tab to open the School screen.

3. Click the **"Add School"** button and a yellow highlighted "Name" field appears with "Search," "Cancel" and "New School" buttons.



- a. If the school was previously added in the Setup area on the Educational Institutions screen:

- Type any part of the school's name in the "Name" field and click the **"Search"** button.



- A list is generated that includes schools which were entered on the Educational Institutions screen, as well as member institutions listed in the NCAA membership database.
- Click the name of the appropriate school to be added to the prospective student-athlete's School screen.

- b. If the institution has not already been added to the compliance program:

- Click the **"New School"** button.



- The Educational Institutions screen appears.
- Add the school's information into the data fields.

Educational Institutions ✖  
 List Detail  
 New Institution  
 Institution Code   
 School Type HIGH SCHOOL   
 Name   
 Address 1   
 Address 2   
 City   
 State AB   
 Postal Code   
 Administrator's Name   
 Administrator's Email   
 Athletics Phone   
 Institution Phone   
 Athletic Webpage   
Save

- Click the **"Save"** button.
- Click the **"X"** in the top right corner to close the Educational Institutions screen.
- Type any part of the school name in the "Name" field and click the **"Search"** button.

Name

- Click the **"name of the appropriate school"** to be added to the prospective student-athlete's School screen.
- c. If the prospective student-athlete attended more than one high school or preparatory school, click the **"Add School"** button to add additional schools.

### How to Delete a School from a Prospective Student-Athlete

1. Click the **"prospective student-athlete's name"** on the List tab.
2. Click the **"School"** tab to open the School screen.
3. Click the **"Delete"** button on the line of information for the school to be deleted.
4. A message will appear asking "Are you sure you want to delete this record?"
  - a. Click the **"OK"** button to delete the school for that prospective student-athlete.
  - b. Click the **"Cancel"** button to keep the school for that prospective student-athlete.

## Correspondence Screen

- The Correspondence screen allows the user to track the correspondence sent to the prospective student-athlete.
- The CA program applies the appropriate legislation based on the "Class" chosen on the prospective student-athlete's Detail screen.
- If an item is highlighted in red, place the cursor on the red field and an explanation will be provided.
- It is important to note that **if recruiting information is entered during a summer**, it should be entered into the CA program using the academic year that just ended rather than the upcoming academic year. This is necessary because the academic year runs from August 1 to July 31 in the recruiting calendars within the CA program, and the correct rules will only be applied if recruiting information is entered during the correct academic year. Once August 1 occurs, the prospective student-athletes may be rolled over to the new academic year using the Recruiting Startup function in the Tools area.

Date	Type	Mailed	Notes

Add Correspondence

Save

### How to Add Correspondence for a Prospective Student-Athlete

1. Click the "**prospective student-athlete's name**" on the List screen.
2. Click the "**Correspondence**" tab to open the Correspondence screen.
3. Click the "**Add Correspondence**" button.
4. Complete the fields regarding the correspondence. Note that based on the "Class" chosen for a prospective student-athlete, the "Type" field will only list the options available based on current NCAA legislation.
5. Click the "**Save**" button.

### How to Delete Correspondence for a Prospective Student-Athlete

1. Click the "**prospective student-athlete's name**" on the List screen.



2. Click the **"Correspondence"** tab to open the Correspondence screen.
3. Click the **"Delete"** button on the line of information for the correspondence to be deleted.
  - a. Please note that after clicking the **"Delete"** button, a warning message does not appear before the correspondence is removed.
  - b. If the **"Delete"** button is pressed mistakenly, the user can avoid deleting correspondence by clicking off of the screen without clicking the **"Save"** button.
4. Click the **"Save"** button to delete the correspondence.

## Telephone Log Screen

- The Telephone Log screen allows the user to track the telephone calls made to the prospective student-athlete.
- The CA program applies the appropriate legislation as it relates to the number and timing of telephone calls since CA has been programmed with the recruiting calendars.
- If an item is highlighted in red, place the cursor over the red background and an explanation will be provided.
- It is important to note that **if recruiting information is entered during a summer**, it should be entered into the CA program using the academic year that just ended rather than the upcoming academic year. This is necessary because the academic year runs from August 1 to July 31 in the recruiting calendars within the CA program, and the correct rules will only be applied if recruiting information is entered during the correct academic year. Once August 1 occurs, the prospective student-athletes may be rolled over to the new academic year using the Recruiting Startup function in the Tools area.

Date	Time	Type	Complete?	Sport	To	Unlimited Call	From	Phone	Notes	Delete
							Full Access		Notes	Delete

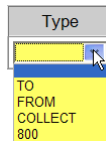
### How to Add Telephone Calls for a Prospective Student-Athlete

1. Click the **"prospective student-athlete's name"** on the List screen.

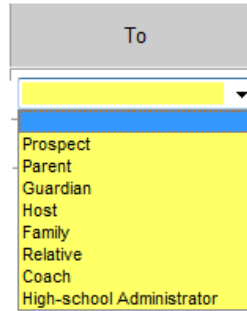
2. Click the **"Phone Log"** tab to open the Telephone Log screen.
3. Click the **"Add Call"** button.
4. Complete the required fields (i.e., Date, Time, Type, Complete?, Sport, To, Unlimited Call) regarding the telephone call.

- a. The "Type" field is used by the CA program to determine whether calls are countable.

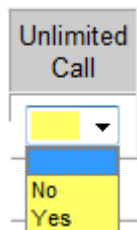
- "To": A call made by the coach or institutional staff member to the prospective student-athlete.



- "From": A call received from a prospective student-athlete or family member that was made without using the institution's toll-free number or that was not a collect call.
  - "Collect": A collect call from a prospective student-athlete or family member.
  - "800": A call from a prospective student-athlete or family member made to the institution's toll-free 800 number.
- b. The "Complete" field indicates whether the coach talked to the prospective student-athlete or family member.
    - "Yes": The coach was able to speak with the individual called.
    - "No": The coach was unable to speak with the individual called (e.g., left message).
  - c. The "To" field identifies the individual to which the call was made.
    - The following options are available in the "To" drop-down box: "Prospect," "Parent," "Guardian," "Host," "Family," "Relative," "Coach" or "High-School Administrator."



- d. The "Unlimited Call" field allows the user to designate whether the telephone call was made during a period of time in which unlimited calls are permissible (e.g., five days before an official visit).
- Choosing "Yes" from the pull-down box indicates the telephone call was made during a time when unlimited calls are permissible.
  - Choosing "No" from the pull-down box or leaving the field blank indicates the telephone call was not made during a time when unlimited calls are permissible and applicable recruiting legislation for phone calls will be applied to the telephone call.



- e. The "From" field automatically enters the name of the user; however, this name may be manually changed by clicking in the field and typing a different name.
- f. The "Phone" field is to track the telephone number called.
- g. The "Notes" field opens a free-form box in which information may be entered. The button will turn blue if information is entered in that field.
5. Click the **"Save"** button.
6. If a red background appears around the line of data entered, a telephone call has been made which may require further investigation. To view the reason for the warning, move the cursor over the red background. In the picture below, the tool-tip indicates that there were "Too many calls (made) per week."

11/01/2008	01:00 PM	TO	Yes	WBB	Prospect	Tammy Smith		Notes	Delete
Too many calls per week.									

### How to Delete Telephone Calls for a Prospective Student-Athlete

1. Click the "**prospective student-athlete's name**" on the List screen.
2. Click the "**Telephone Log**" tab to open the Telephone Log screen.
3. Click the "**Delete**" button on the line of information for the call to be deleted.
  - a. Please note that after clicking the "**Delete**" button, a warning message does not appear before the call is removed.
  - b. If the "**Delete**" button is pressed mistakenly, the user can avoid deleting the call by clicking off of the screen without clicking the "**Save**" button.
4. Click the "**Save**" button to delete the call.

### Contacts/Evaluations Screen

- The Contacts/Evaluations screen allows the user to track the contacts and evaluations for the prospective student-athlete.
- The CA program applies the appropriate legislation as it relates to the number and timing of contacts and evaluations since the CA program has been programmed with the recruiting calendars.
- If an item is highlighted in red, place the cursor over the red background and an explanation will be provided.
- It is important to note that **if recruiting information is entered during a summer**, it should be entered into the CA program using the academic year that just ended rather than the upcoming academic year. This is necessary because the academic year runs from August 1 to July 31 in the recruiting calendars within the CA program, and the correct rules will only be applied if recruiting information is entered during the correct academic year. Once August 1 occurs, the prospective student-athletes may be rolled over to the new academic year using the Recruiting Startup function in the Tools area.

The screenshot shows a web interface with a navigation bar at the top containing tabs: List, Detail, Guardian, Sports, School, Correspondence, Telephone Log, **Contacts/Evaluations**, Official Visit, Unofficial Visits, and NLI. Below the navigation bar are buttons for New PSA, Delete PSA, and Make S-A. The main form has a table with the following columns: Type, Date, Sport, Location, Educ. Inst. or Sanctioned Event, Notes, and Delete. The first row contains: Evaluation (dropdown), a date field, WFH (dropdown), an empty location field, a dropdown for the event, Notes, and Delete. Below the table is an 'Add Contact/Evaluation' button and a 'Save' button.

### How to Add Contacts/Evaluations for a Prospective Student-Athlete

1. Click the "**prospective student-athlete's name**" on the List screen.
2. Click the "**Contacts/Evaluations**" tab to open the Contacts/Evaluations screen.
3. Click the "**Add Contact/Evaluation**" button.
4. Complete the required fields (i.e., Type, Date, Sport) regarding the contact or evaluation.
  - a. The "Type" field is provided to track whether it was an "Evaluation," "Contact" or "Summer Evaluation."
    - Note that if "Summer Evaluation" is chosen, a message will appear stating: "Evaluation must occur during the prospective student-athlete's summer vacation."
    - In the sport of men's basketball, the "Type" field will also include an option for "NBA Predraft Camp."
    - If a red background appears around the line of data entered, the contact or evaluation has been made during a time in which they are not allowed. To view the reason for the error, move the cursor over the red background. In the picture below, the tool-tip message indicates that "Contact too early."

This screenshot shows the same form as above, but with a red background highlighting the Type, Date, and Sport fields. The Type field is set to 'Contact' and the Date is '01/22/2009'. The Sport field is 'MFE'. A tooltip message 'Contact too early.' is visible at the bottom right of the form.

- b. The "Educational Institution or Sanctioned Event" field is to be answered "Yes" or "No."
    - If "No" is chosen, a red background may appear around the line of data entered. To view the reason for the warning, move the cursor over the red background. The tool-tip message may indicate that "Evaluations at nonscholastic events are not permitted during this period."

- For a prospect recruited in men's basketball, if a "Yes" is not chosen from the drop-down box in that column for an April evaluation or contact, a red background may appear around the line of data entered. The tool-tip message may indicate that "Contacts/Evaluations in April must be at a prospect's educational institution."
  - c. The "Notes" field opens a free-form box in which information may be entered. The button will turn blue if information is entered in that field.
5. Click the "**Save**" button.

### **How to Delete Contacts/Evaluations for a Prospective Student-Athlete**

1. Click the "**prospective student-athlete's name**" on the List screen.
2. Click the "**Contacts/Evaluations**" tab to open the Contacts/Evaluations screen.
3. Click the "**Delete**" button on the line of information for the contact or evaluation to be deleted.
  - a. Please note that after clicking the "**Delete**" button, a warning message does not appear before the contact or evaluation is removed.
  - b. If the "**Delete**" button is pressed mistakenly, the user can avoid deleting the contact/evaluation by clicking off of the screen without clicking the "**Save**" button.
4. Click the "**Save**" button to delete the contact/evaluation.

## **Official Visit Screen**

- The Official Visit screen allows the user to track the official visit made by the prospective student-athlete.
- The CA program applies the appropriate legislation as it relates to the length of the visit and student host money.
- If an item is highlighted in red, place the cursor over the red background and an explanation will be provided.
- It is important to note that **if recruiting information is entered during a summer**, it should be entered into the CA program using the academic year that just ended rather than the upcoming academic year. This is necessary because the academic year runs from August 1 to July 31 in the recruiting calendars within the CA program, and the correct rules will only be applied if recruiting information is entered during the correct academic year.

Once August 1 occurs, the prospective student-athletes may be rolled over to the new academic year using the Recruiting Startup function in the Tools area.

The screenshot displays the 'Official Visit' screen. At the top, a navigation bar includes tabs for 'List', 'Detail', 'Years', 'Guardian', 'Sports', 'School', 'Corr.', 'Phone Log', 'Contacts / Evaluations', 'Official Visit', 'Unofficial Visits', and 'NLI/Offer'. Below this are buttons for 'New PSA' and 'Delete PSA'. The main form area contains the following fields and controls:

- Date of visit**: A date field with a yellow background, a calendar icon, and a 'Save' button.
- Start Time**: A text input field.
- End Date**: A date field with a calendar icon.
- End Time**: A text input field.
- Transcript Received**: A red text label.
- Date Test Score Received**: A date field with a yellow background and a calendar icon.
- IRL Date**: A red text label.
- EC Registration Date**: A red text label.
- Accommodations**: A table with two columns: 'Location' and 'Cost'.
- Transportation**: A table with two columns: 'Type' and 'Cost'.

- Dates for the "Transcript Received," "IRL Date" and "EC Registration Date" fields are entered on the Detail screen of the prospective student-athlete. Once the dates have been entered on the Detail screen, they carry over to the Official Visit screen. The dates must be prior to the official visit date. [Note: The field labels for "Transcript Received," "IRL Date" and "EC Registration Date" remain red until the user enters those dates on the Detail Screen. The field labels also turn red if the dates entered for those fields are subsequent to the date entered in the "Date of visit" field. If the field labels are red, move the cursor over the red background and a tool tip will display the reason for the warning.]

### How to Add an Official Visit for a Prospective Student-Athlete

1. Click the "**prospective student-athlete's name**" on the List screen.
2. Click the "**Official Visit**" tab to open the Official Visit screen.
3. Enter the required fields of "Date of visit," "Date transcript received" and "Date test score received."

Prospective Student Athletes

NCAA University

Hoops Malone  
Sports: WBB

Showing 3 of 7

List Detail Years Guardian Sports School Corr. Phone Log Contacts / Evaluations **Official Visit** Unofficial Visits NLI/Offer

New PSA Delete PSA

Date of visit 04/12/2014 Save Tickets... Companion... Host... Meals... Delete

Start Time 12:00 AM

End Date 04/12/2014

End Time 12:00 AM

**Transcript Received**

Date Test Score Received 08/01/2013

**IRL Date**

**EC Registration Date**

	Location	Cost
Accommodations		\$ .00

	Type	Cost
Transportation		

Recruit Class

For an official visit that exceeds 48 hours in duration, the CA program message "Official visits are limited to 48 hours" will appear. Once the user clicks "**OK**" to the message, the "Visit beyond 48 hours due to reasons beyond the control of prospect and institution" and "Date Report Sent to Conference Office" fields appear on the screen (and the "Date of Visit" field will turn red).

If the exception to the 48-hour limit is met, the user must do the following for the CA program to recognize the exception:

- Click the check box next to the "Visit beyond 48 hours due to reasons beyond the control of prospect and institution" field.
- Complete the "Date Report Sent to Conference Office" field which is a required field.
- Click the "**Save**" button on the screen.

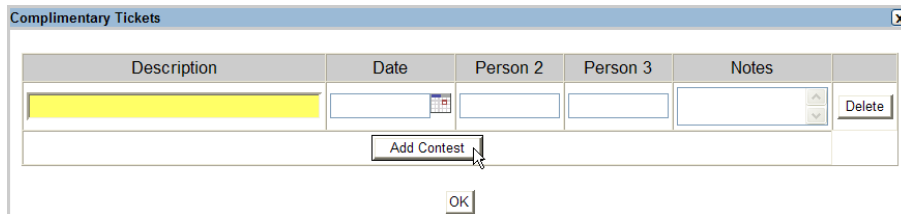
Note: The CA program will continue to display the message "Official visits are limited to 48 hours" and indicate that the "Date Report Sent to Conference Office" field has not been completed until the user is able to enter the date.

- Enter other nonrequired information if desired, including "Start time," "End date," "End time," "Accommodations" information ("Location" and "Cost"), "Transportation" information ("Type" and "Cost"), and "Notes."



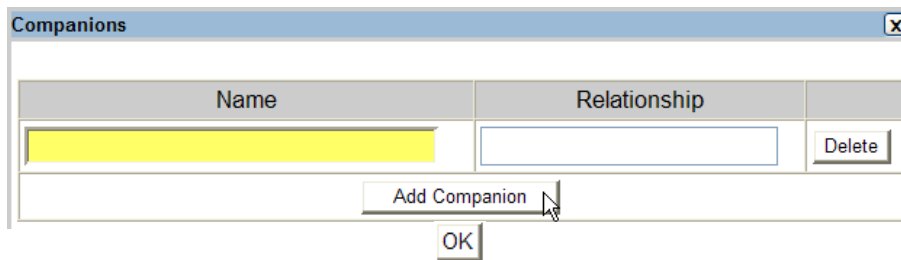
5. Other information regarding the official visit may be accessed by clicking the "Tickets," "Companion," "Host" and "Meals" buttons. Each button will turn blue if information has been entered and saved behind it.

- a. To add ticket information, click the **"Tickets"** button, click the **"Add Contest"** button, enter contest information and click the **"OK"** button.



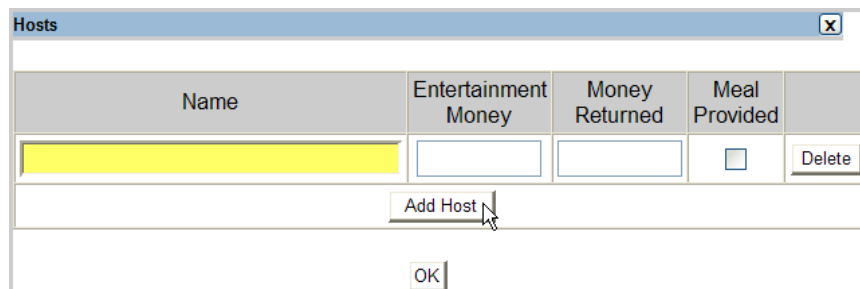
- b. To delete ticket information, click the **"Tickets"** button, click the **"Delete"** button next to the line of information to be deleted and click the **"OK"** button.

- c. To add companion information, click the **"Companion"** button, click the **"Add Companion"** button, enter companion information and click the **"OK"** button.



- d. To delete companion information, click the **"Companion"** button, click the **"Delete"** button next to the line of information to be deleted and click the **"OK"** button.

- e. To add host information, click the **"Host"** button, click the **"Add Host"** button, enter host information and click the **"OK"** button.



- f. To delete host information, click the **"Host"** button, click the **"Delete"** button next to the line of information to be deleted and click the **"OK"** button.
- g. To add meals information, click the **"Meals"** button, click the **"Add Meal"** button, enter meal information and click the **"OK"** button.

Date	Type	Location	Cost	Notes	Attendees
	Breakfast				Add Attendee Delete

Add Meal

OK

- h. To delete meals information, click the **"Meals"** button, click the **"Delete"** button next to the line of information to be deleted and click the **"OK"** button.
6. Click the **"Save"** button.

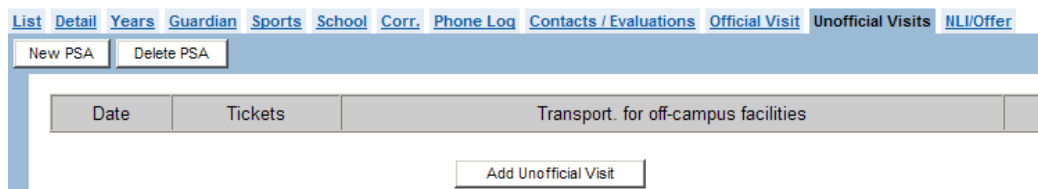
### How to Delete an Official Visit for a Prospective Student-Athlete

1. Click the **"prospective student-athlete's name"** on the List screen.
2. Click the **"Official Visit"** tab to open the Official Visit screen.
3. Click the **"Delete"** button on the line of information for the official visit to be deleted.
  - a. A message will appear asking "Are you sure you want to delete this record?" Click the **"OK"** button to delete the official visit for that prospective student-athlete.
  - b. Click the **"Cancel"** button to keep the official visit for that prospective student-athlete.
4. Click the **"Save"** button.

### Unofficial Visits Screen

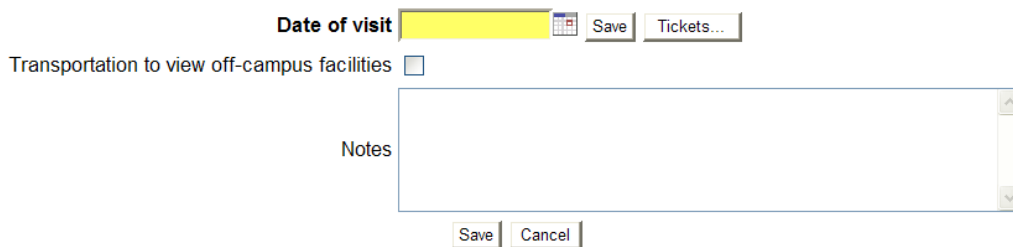
- The Unofficial Visits screen allows the user to track the unofficial visits made by the prospective student-athlete.
- It is important to note that **if recruiting information is entered during a summer**, it should be entered into the CA program using the academic year that just ended rather than the upcoming academic year. This is necessary because the academic year runs from August 1 to July 31 in the recruiting calendars within the CA program, and the correct rules

will only be applied if recruiting information is entered during the correct academic year. Once August 1 occurs, the prospective student-athletes may be rolled over to the new academic year using the Recruiting Startup function in the Tools area.

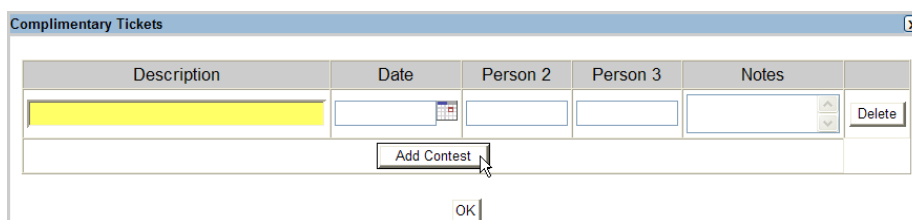


### How to Add an Unofficial Visit for a Prospective Student-Athlete

1. Click the "**prospective student-athlete's name**" on the List screen.
2. Click the "**Unofficial Visits**" tab to open the Unofficial Visits screen.
3. Click the "**Add Unofficial Visit**" button and a screen appears to enter visit information.



4. Enter the required field of "Date of visit."
5. Enter other nonrequired information if desired, including "Transportation to view off-campus facilities" and "Notes."
6. Other information regarding the unofficial visit may be accessed by clicking the "**Tickets**" button.
  - a. To add ticket information, click the "**Tickets**" button, click the "**Add Contest**" button, enter contest information and click the "**OK**" button.



- b. To delete ticket information, click the **"Tickets"** button, click the **"Delete"** button next to the line of information to be deleted and click the **"OK"** button.
7. Click the **"Save"** button.
8. To return to the list of all unofficial visits, click the **"Cancel"** button after saving the visit.

### **How to Delete an Unofficial Visit for a Prospective Student-Athlete**

1. Click the **"prospective student-athlete's name"** on the List screen.
2. Click the **"Unofficial Visits"** tab to open the Unofficial Visits screen.
3. Click the **"Delete"** button on the line of information for the unofficial visit to be deleted.
4. A message will appear asking "Are you sure you want to delete this record?"
  - a. Click the **"OK"** button to delete the unofficial visit for that prospective student-athlete.
  - b. Click the **"Cancel"** button to keep the unofficial visit for that prospective student-athlete.
5. Click the **"Save"** button.

### **National Letter of Intent (NLI)/Offer Screen**

- The NLI/Offer screen allows the user to track information regarding the prospective student-athlete's NLI (e.g., "Date signed by the athletic director," "Date received from prospect").
- Dates for the "IRL Date," "EC Registration Date," "Amateurism Certification Questionnaire" and "Final Academic Certification" fields are entered on the Detail screen of the prospective student-athlete. Once the data has been entered on the Detail screen, it carries over to the NLI/Offer screen. The CA program checks that those dates are prior to the date entered in the "Date issued to Prospect" field. [Note: The field labels remain red until the user enters those dates on the Detail Screen. The field labels also turn red if the dates entered for those fields (e.g., "IRL Date" and "EC Registration Date") are subsequent to the date entered in the "Date issued to Prospect" field. If the field labels are red, place the cursor over the red background and an explanation will be provided.]

- A "Comments" box allows the CA user to track any NLI/Offer information on this screen.
- Announcements also may be added on this screen. If data has been entered and saved on the Announcements pop-up screen, the button will turn blue.

### For Division II Institutions Only

- Dates for the "Transcript Received/Final Academic Certification," "IRL Date" and "EC Registration Date" fields are entered on the Detail screen of the prospective student-athlete. Once the data has been entered on the Detail screen, it carries over to the NLI/Offer screen. (The "Transcript Received" date and "Final Academic Certification" date are compared and whichever date is earlier entered on the Detail screen will carry over to the NLI/Offer screen.) The CA program checks that those dates are prior to the date entered in the "Date issued to Prospect" field. [Note: The field labels remain red until the user enters those dates on the Detail Screen. The field labels also turn red if the dates entered for those fields (e.g., "IRL Date" and "EC Registration Date") are subsequent to the date entered in the "Date issued to Prospect" field. If the field labels are red, place the cursor over the red background and an explanation will be provided.]

### How to Add NLI/Offer Information for a Prospective Student-Athlete

1. Click the **"prospective student-athlete's name"** on the List screen.
2. Click the **"NLI/Offer"** tab to open the NLI/Offer screen.
3. Enter the required field of "Date signed by AD."
4. Enter other nonrequired information if desired, including "Date issued to prospect (as listed on NLI)," "Amount of financial aid awarded," "Date sent to prospect," "Date received from prospect," "Date signed by prospect," "Date signed by parent/guardian," "Date publicity approved" and "Date sent to conference."
5. Other information regarding the NLI/Offer may be accessed by clicking the **"Announcements"** button.

- a. To add announcement information, click the "**Announcements**" button, click the "**Add Announcement**" button, enter announcement information and click the "**OK**" button.
  - b. To delete announcement information, click the "**Announcements**" button, click the "**Delete**" button next to the line of information to be deleted and click the "**OK**" button.
6. Click the "**Save**" button.

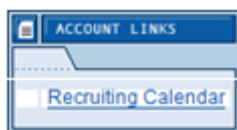
### How to Delete a Prospective Student-Athlete from the CA Program

**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 how to make a prospective student-athlete inactive, see information about the "Status" field in the Detail screen section of this chapter.)

1. Click the "**prospective student-athlete's name**" on the List screen to go to the Detail screen for the prospective student-athlete to be deleted.
2. Click the "**Delete PSA**" button.
3. A message will appear asking "Are you sure you want to delete this record?"
  - a. Click the "**OK**" button to delete the prospective student-athlete. Please note that the prospective student-athlete will be removed from the CA program and will no longer appear on the prospective student-athlete list in any academic year.
  - b. Click the "**Cancel**" button to keep the prospective student-athlete in the list.

## Recruiting Calendars

- The recruiting calendars for each sport sponsored by the institution are available when clicking "Recruiting Calendar" in the Account Links menu on the left side of the screen.

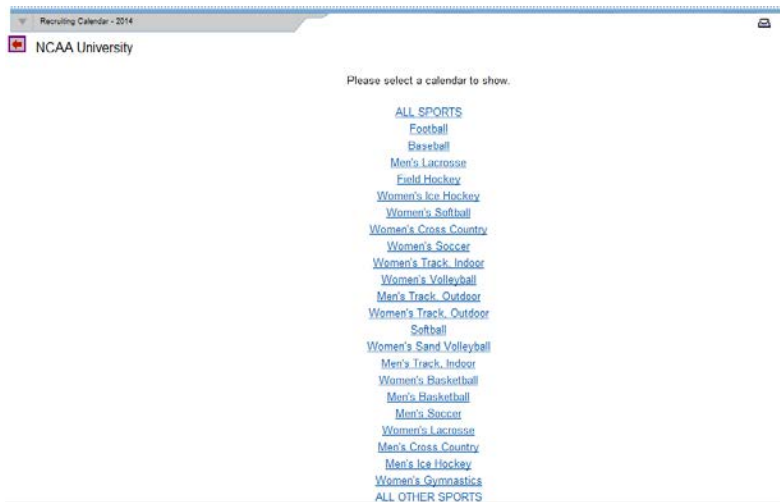


- The recruiting calendar for the current day also may be viewed when on the Main screen of the CA program. The Main screen is accessed when first logging into the CA program or by clicking "Main" in the Account Links menu on the left side of the screen.

- Recruiting calendars are provided for users to view the contact, evaluation, quiet and dead periods for each sport.
- The recruiting calendars can be viewed either with all sports listed on one calendar or with a separate calendar for each sport.

**How to View Recruiting Calendars**

1. Click "**Recruiting Calendar**" in the Account Links menu on the left side of the screen.
2. A screen appears listing all available recruiting calendars.
3. Click the individual sport, the "All Sports" option or the "All Other Sports" option to view the desired calendar.



4. The calendar appears.

**August 2014**

S	M	T	W	T	F	S
					1 WSV - CONTACT WVB - CONTACT WTI - QUIET MLA - CONTACT WCC - QUIET WBB - QUIET MTO - QUIET WTO - QUIET MFB - QUIET MBB - QUIET WLA - CONTACT MBA - CONTACT MCC - QUIET WSB - CONTACT MTI - QUIET	2 WSV - CONTACT WVB - CONTACT WTI - QUIET MLA - CONTACT WCC - QUIET WBB - QUIET MTO - QUIET WTO - QUIET MFB - QUIET MBB - QUIET WLA - CONTACT MBA - CONTACT MCC - QUIET WSB - CONTACT MTI - QUIET
3 WSV - CONTACT WVB - CONTACT WTI - QUIET MLA - CONTACT	4 WSV - CONTACT WVB - CONTACT WTI - QUIET MLA - CONTACT	5 WSV - CONTACT WVB - CONTACT WTI - QUIET MLA - QUIET	6 WSV - CONTACT WVB - CONTACT WTI - QUIET MLA - QUIET	7 WSV - CONTACT WVB - CONTACT WTI - QUIET MLA - QUIET	8 WSV - CONTACT WVB - CONTACT WTI - QUIET MLA - QUIET	9 WSV - CONTACT WVB - CONTACT WTI - QUIET MLA - QUIET



5. The sport code and the appropriate "Contact," "Evaluation," "Quiet" or "Dead" period is listed.
6. Please note that the recruiting calendar for the current day is listed on the Main screen under the monthly calendar.