



# Compliance Assistant *Information and Training*



***Tucson, Arizona – May 16-20, 2011***  
***Tampa, Florida – June 6-10, 2011***





# Compliance Assistant

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# Compliance Assistant

## ***WHAT IS COMPLIANCE ASSISTANT?***

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Compliance Assistant is a tool designed to help administrators ensure that their athletics department and student-athletes are in compliance with NCAA legislation. In addition to applying NCAA legislation in the areas of financial aid, eligibility, recruiting, athletics personnel and playing and practice seasons, it is a data-collection system that can be used to generate NCAA-required forms and reports created by the user. This program, documentation and technical support are provided free to the NCAA membership.

## ***RESOURCES AND SUPPORT***

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The Compliance Assistant team at the NCAA national office is made up of academic and membership affairs and information services professionals working together to create new modules and develop updates based on innovative ideas and legislative changes adopted by the membership. The team is available to assist compliance assistant administrators on campus by email at **[complianceassistant@ncaa.org](mailto:complianceassistant@ncaa.org)**.

Support of the program is also available via the NCAA.org website. The site includes links to helpful resources including the user guide, helpful hints documents, frequently asked questions documents and others deemed helpful to the users. Users may access these valuable resources at **[NCAA.org/Governance/Compliance, Waivers & Reinstatement/Compliance Assistant \(CA\)/Compliance Assistant Internet Help](http://NCAA.org/Governance/Compliance, Waivers & Reinstatement/Compliance Assistant (CA)/Compliance Assistant Internet Help)**.

## ***TRAINING OPPORTUNITIES***

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The compliance assistant team provides users with opportunities to learn more about the program and all of its sections via electronic and in-person training. In addition to the NCAA Regional Rules Seminars, the team has developed recorded web casts which allows users to view sessions on specific sections of compliance assistant at the user's convenience. The web casts are accessible via the CA User Guide found on the CA website or on the main screen in the CA program. User can also access the web casts in LSDBi through "Resources" along with other AMA Education On Demand training.

Wherever the video icon  appears there is a recorded web cast associated with the topic. The topics currently available via web cast are: Getting Started in Compliance Assistant, Financial Aid, Eligibility, New Academic Year, CSV Import/Export, Playing and Practice Seasons and Ad Hoc Reporting.

## ***Compliance Assistant Schedule of Sessions***

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### ***Monday***

8:30 - 10 a.m.	Getting Started with Compliance Assistant
10:15 - 11:15 a.m.	Playing and Practice Seasons
11:30 a.m. - 12:30 p.m.	Division I Financial Aid
2 - 3 p.m.	Division I Lessons in Eligibility
3:15 - 4:15 p.m.	Getting Ready for the Next Academic Year

### ***Tuesday***

8:30 - 10 a.m.	Tools - CSV Import/Export
10:15 - 11:15 a.m.	Help Desk
11:30 a.m. - 12:30 p.m.	Ad Hoc Reporting

### ***Wednesday***

9 - 10 a.m.	Playing and Practice Seasons
10:15 - 11:15 a.m.	Division I Financial Aid
11:30 a.m. - 12:30 p.m.	Division I Lessons in Eligibility
2 - 3:30 p.m.	Getting Started with Compliance Assist
3:45 - 4:45 p.m.	Tools - CSV Import/Export

### ***Thursday***

8:30 - 9:30 a.m.	Help Desk
9:45 - 10:45 a.m.	Division II Financial Aid
11 a.m. - Noon	Getting Ready for the Next Academic Year
1:30 - 3 p.m.	Ad Hoc Reporting
3:15 - 4:15 p.m.	Division II Lessons in Eligibility

### ***Friday***

No Compliance Assistant Sessions

## ***Compliance Assistant Training Session Descriptions***

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*Computer access is limited and available on a first come, first serve basis.*

<i><b>Session Name</b></i>	<i><b>Description</b></i>	<i><b>Dates and Times</b></i>
<i><b>Ad Hoc Reporting</b></i>	Recommended for users with an understanding of Compliance Assistant standard reports and want to know how to create custom reports using the information tracked in the program. This session will include hands-on examples for attendees with computer access. Attendees are expected to review the AMA Education On Demand video, "Basics in Ad Hoc Reporting" prior to attending this session.	<i><b>Tuesday 11:30 a.m. Thursday 1:30 p.m.</b></i>
<i><b>Getting Ready for the Next Academic Year</b></i>	Recommended for users with a basic understanding of Compliance Assistant functionality. This session will provide attendees with a planning calendar for specific steps in preparing Compliance Assistant for use in the next academic year. This session will include a combination of instructor-demonstrated and hands-on examples for attendees with computer access. Attendees are expected to review the AMA Education On Demand video, "New Academic Year: Rolling over Data," prior to attending this session.	<i><b>Monday 3:15 p.m. Thursday 11 a.m.</b></i>
<i><b>Getting Started with Compliance Assistant</b></i>	Recommended for new users, this self-directed session provides beginners the opportunity to learn some basic Compliance Assistant concepts and functions through the online AMA Education On Demand training videos. The videos provide Compliance Assistant users the foundation for the advanced content of other Compliance Assistant sessions. Compliance Assistant staff will be available to assist users and to answer specific questions related to the program.	<i><b>Monday 8:30 a.m. Wednesday 2 p.m.</b></i>
<i><b>Help Desk</b></i>	Recommended for users who have campus specific questions or need additional assistance outside of regular session time.	<i><b>Tuesday 10:15 a.m. Thursday 8:30 a.m.</b></i>
<i><b>Playing and Practice Seasons</b></i>	Recommended for users with an understanding of playing and practice season legislation and Compliance Assistant functionality. This session will use instructor-demonstrated examples to provide an overview of some more advanced Compliance Assistant tools for tracking playing and practice season information. Attendees are expected to review the AMA Education On Demand video, "Compliance Assistant – Playing and Practice Seasons," prior to attending this session.	<i><b>Monday 10:15 a.m. Wednesday 9 a.m.</b></i>

<i><b>Session Name</b></i>	<i><b>Description</b></i>	<i><b>Dates and Times</b></i>
<i><b>Tools - CSV Import/Export</b></i>	Recommended for advanced users with an understanding of Compliance Assistant's functionality and the comma separated value (CSV) file format. This session will focus on Compliance Assistant's ability to create, update and delete data through the import tool. This session will use instructor-demonstrated and hands-on examples for attendees with computer access. Attendees are expected to review the two AMA Education On Demand videos, "Comma Separated Values (1/2)" and "CSV Import/Export: Using the Tool (2/2)" prior to attending this session.	<i><b>Tuesday 8:30 a.m. Wednesday 3:45 p.m.</b></i>
<i><b>Divisions I and II Financial Aid</b></i>	Recommended for users with an understanding of NCAA Divisions I and II financial aid legislation and Compliance Assistant functionality. This session will focus on Compliance Assistant tools for tracking student-athlete and team financial aid information. This session will include hands-on examples for attendees with computer access. Attendees are expected to review the AMA Education On Demand videos, "Division I Financial Aid" or "Division II Financial Aid" prior to attending the session.	<i><b>Division I – Monday 11:30 a.m. Wednesday 10:15 a.m.</b></i>  <i><b>Division II – Thursday 9:45 a.m.</b></i>
<i><b>Divisions I and II Lessons in Eligibility</b></i>	Recommended for users with an understanding of the Divisions I and II eligibility legislation and Compliance Assistant functionality. This session will focus on Compliance Assistant tools for tracking initial, transfer and general eligibility. This session will include a combination of instructor-demonstrated and hands-on examples for attendees with computer access. Attendees are expected to review the AMA Education On Demand video, "Tracking Division I Eligibility" prior to attending the Division I session.	<i><b>Division I - Monday 2 p.m. Wednesday 11:30 a.m.</b></i>  <i><b>Division II - Thursday 3:15 p.m.</b></i>

## ***Compliance Assistant Training Access and Login***

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### ***ACCESS COMPLIANCE ASSISTANT LOGIN SCREEN***

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Click the Compliance Assistant shortcut found on your desktop:



### ***DIVISION I SESSIONS***

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#### ***Login Information:***

NCAA User ID:  
Password:

**CAD1@ncaa.org**  
**catraining1**

### ***DIVISION II SESSIONS***

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#### ***Login Information:***

NCAA User ID:  
Password:

**CAD2@ncaa.org**  
**catraining2**



## *Compliance Assistant*

### *Creating a New Student-Athlete*

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1. If you are not already logged in, log-in to Compliance Assistant (see Compliance Assistant Training Access and Log-in, Page No. 5).
2. Click "**Student-Athletes**" in the Account Links menu.
3. Click the "**New Student**" button located at the top left of the screen.
4. Fill in fields highlighted in yellow (required fields). Please make sure to enter the initial full-time enrollment information that your presenter instructs you to enter.
5. Click the "**Save**" button.
6. Click the "**Sports**" tab.
7. Click the "**Add Sport**" button.
8. Click a sport from the list of sponsored sports. Please make sure to add the student-athlete to the sport(s) that your presenter instructs you to enter.
9. Click the "**Save Sport**" button after selecting a sport that you wish to be added for the student-athlete. Please repeat steps seven through nine to add the student-athlete to an additional sport if the student-athlete is a multisport participant.

