



WHOLE GAME SYSTEM

FA Charter Standard - Annual Health Checks
CRM Guidance Note - Version 1.1

Introduction

This guide covers the various processes which County FA users will need to follow within CRM for the management and monitoring of FA Charter Standard Annual Health Checks.

It is important to note that most of the changes which form part of the FA Charter Standard Annual Health Check process are done to “live” data – e.g. if a new coach or manager is appointed to a team, this will update the live team record. Ideally the FA Charter Standard Annual Health Checks should be completed before the club concerned starts its affiliation process – if a Health Check is still in progress once the club has created its affiliation form for the new season, then any amendments to the Health Check form (which affect teams in the current season) will not be reflected in the affiliation data for the new season, and may therefore need to be input again by the club in its affiliation form.

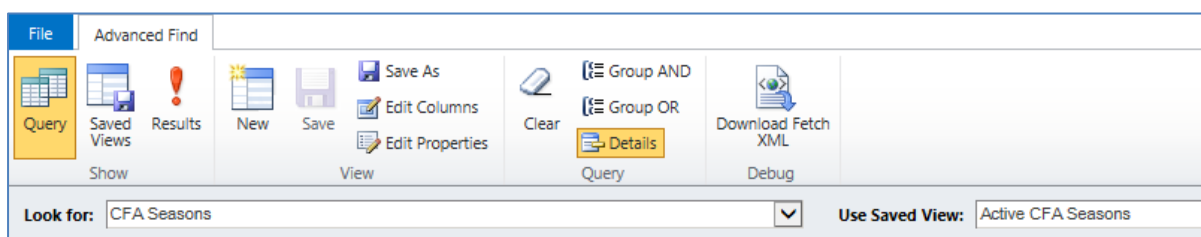
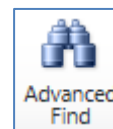
Contents

CFA Season Setup	3
Linking Clubs	4
Accessing the FA Charter Standard Annual Health Check Form in Portal	5
Creating FA Charter Standard Annual Health Check Forms	6
Printing FA Charter Standard Annual Health Check Forms	7
Reviewing FA Charter Standard Annual Health Check Forms	8
Approving FA Charter Standard Annual Health Check Forms	9
Rejecting FA Charter Standard Annual Health Check Forms	9
Suspended and Lapsed FA Charter Standard Clubs	9
Checklist for Club Setup for FA Charter Standard Annual Health Checks	10

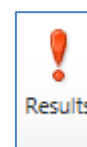
CFA Season Setup

The dates for FA Charter Standard Annual Health Checks may be set individually by each County FA, and control when their FA Charter Standard Annual Health Check window opens and closes, as well as the dates for FA Charter Standard Status being set as suspended and lapsed.

To update your CFA Season click on “Advanced Find” and select “CFA Seasons” in the “Look for” dropdown and in the “Use Saved View” section, select “Active CFA Seasons”.



Once you have got CFA Seasons and Active CFA Seasons selected, click on Results and you will get a list of seasons displayed. Double click on the current season. This will open up a CFA Season record – check it is the correct county and season.



CFA Season

Amateur Football Alliance 2015 - 2016

General

Name *

County FA * [Amateur Football Alliance](#)

League Sanction Dates

Navigate down the page to the CS Annual Health Check Application section, where you can set the appropriate dates for the Annual Health Checks. The dates you should set are as follows:-

Start Date – the date on which the Health Check window should be opened. This cannot be earlier than 1st September.

End Date – the date on which the Health Check window should be closed (after this date, clubs will no longer be able to update or submit their Health checks). This date cannot be later than 30th June. County FAs will still be able to process Annual Health Checks after this date.

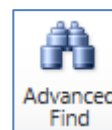
Auto Suspend Date – the date on which any clubs with Health Checks which have not been submitted will have their FA Charter Standard Status set as Suspended.

Auto Lapse Date – the date on which any clubs with Health Checks which have not been submitted will have their FA Charter Standard Status set as Lapsed. If an FA Charter Standard Club has its FA Charter Standard status set as lapsed, it will not be able to complete the Annual Health Check, so it is recommended that the End Date and the Auto Lapse Date are the same.

CS Annual Health Check Application	
Start Date *	01/09/2015
End Date *	30/06/2016
Auto Suspend Date *	28/04/2016
Auto Lapse Date *	31/05/2016

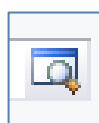
Linking Clubs

Within the WGS Portal, clubs can link themselves as long as the proposed Parent and Child clubs both have the same Club Secretary. If however, the Club Secretaries of the two clubs are different people, then linking will need to be done by the CFA within CRM.



To link a club to a new parent, open up the club Organisation Record in CRM.

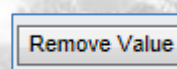
Once opened, navigate to the Club Details section - the Parent Club box will be empty (unless the club already has a Parent Club set). To update the Parent Club click on the



lookup icon and you can search for the new parent club.

Once you have found the new parent club, select it and it will automatically update the child Club Record to show the new Parent Club.

Note that if you need to remove a Parent Club for a child club, then you follow the same process, but instead of Searching for a new club, when you are in the Look Up Record, use the “Remove Value” button at the bottom right hand corner.



This will clear the Parent Club field.

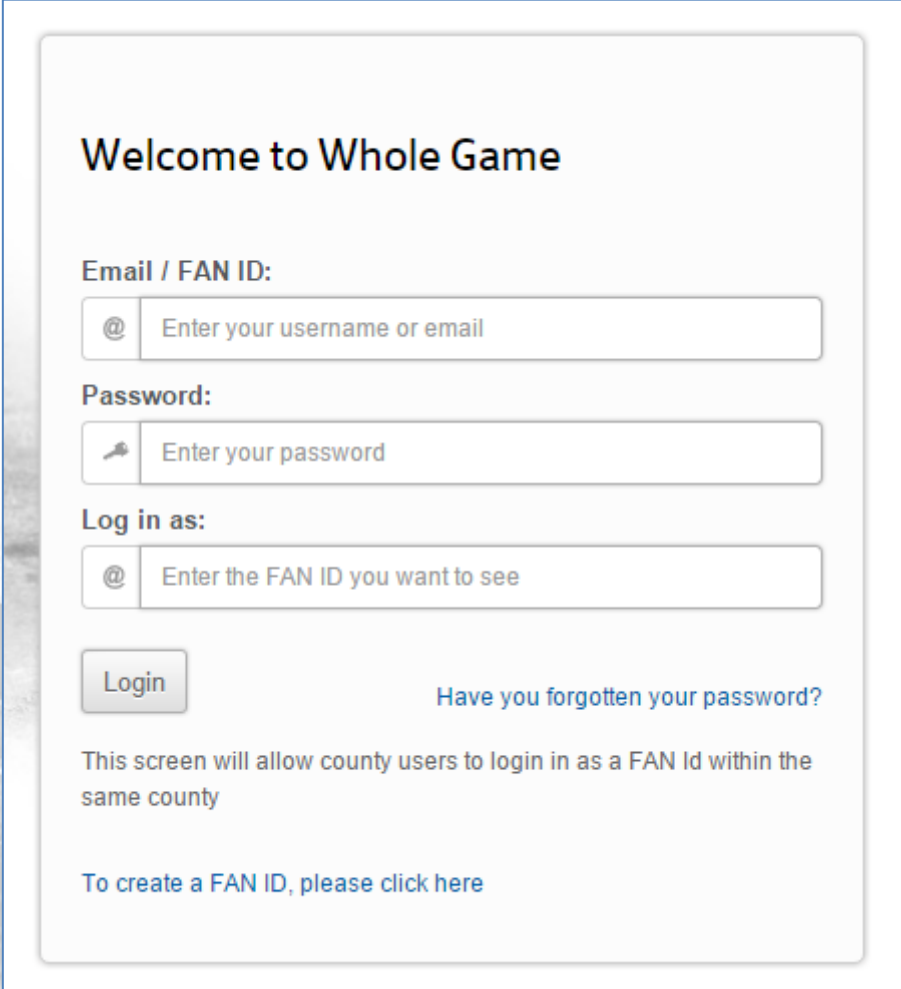
Important note: do **NOT** try and remove a child club by navigating to the Linked Clubs section of the Club Record for the parent club. This section is for information only, and if you select a club within here and click “deactivate” or “delete”, you will be deactivating or deleting the whole club record, not removing the link to the parent club.

Linked Clubs			
<input type="checkbox"/>	Organisation Name ▲	Onside Clu...	Current Season
<input type="checkbox"/>	Abbey Rangers	92779	Completed
<input type="checkbox"/>	Abbey Rangers Girls	93222	Completed
<input type="checkbox"/>	Abbey Rangers Ladies	93223	Completed
1 - 3 of 3 (0 selected)			

Accessing the FA Charter Standard Annual Health Check Form in Portal

To monitor the day to day aspects of a FA Charter Standard Annual Health Check Form, County FA users will need to login to a special page on the WGS Portal – this page then allows them to select a specific user via their FAN number, and login to be able to see their club FA Charter Standard Health Check data. The County FA user concerned must have a CRM account set up on Whole Game System and this must have been linked to their FAN number. In addition, the individual concerned must have a role with their County FA (e.g. as a Club Secretary).

Using your browser, navigate to <http://wholegame.thefa.com/Account/countylogin> rather than the normal WGS Login page, and you will be presented with a login screen which requires you to enter your FAN and your Portal Password (this is your FAN password and not your network password), as well as the FAN ID of the person whose club's FA Charter Standard Annual Health Check Form you wish to access.



Welcome to Whole Game

Email / FAN ID:

Password:

Log in as:

[Have you forgotten your password?](#)

This screen will allow county users to login in as a FAN Id within the same county

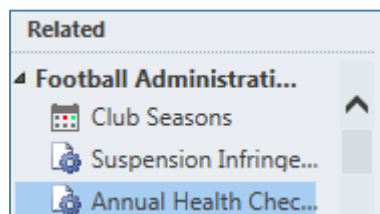
[To create a FAN ID, please click here](#)

Creating FA Charter Standard Annual Health Check Forms

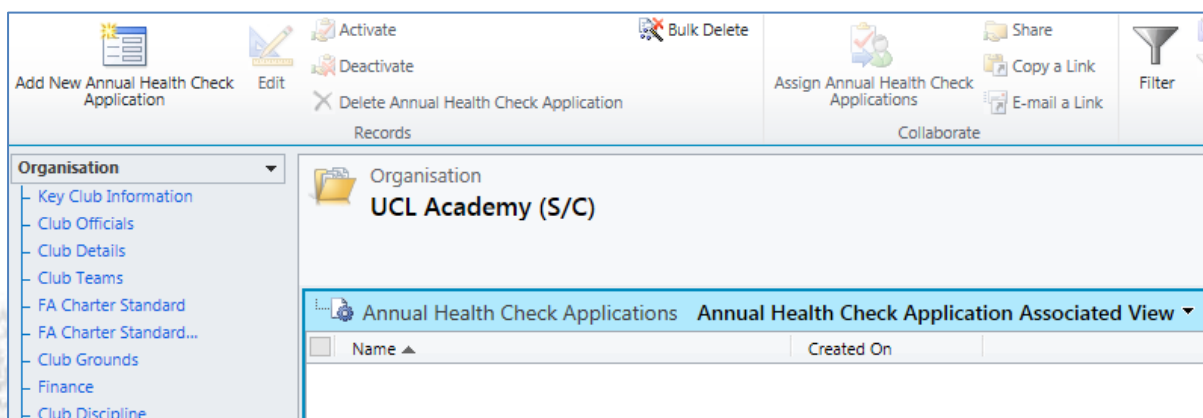
The normal process for creating FA Charter Standard Annual Health Check Forms is that the club concerned will generate the form from within the Portal, as long as the FA Charter Standard Annual Health Check window has been opened (this is recommended, as you can then see which clubs are active in Portal). However, if required the Health Check Form can be created directly in CRM, for example in order to print off a paper Health Check Form.

These forms can be created by selecting a club, and navigating to the first “Annual Health Check” link under the Related section, click on this link.

This will open up the “Annual Health Check Application” view and you can see within this view whether the club has got an FA Charter Standard Annual Health Check form already created.

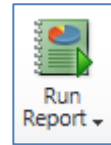


If the form has not yet been created, click on the “Add New” button and a new form can be created and saved, which will also be visible to the club in the Portal. When you give the Health Check form a name, make you use the club name to make it easily identifiable.



Printing FA Charter Standard Annual Health Check Forms

CRM users may also generate a printed copy of the FA Charter Standard Annual Health Check Form. First, the actual form in CRM needs to have been created, but once created the form can be printed for one or more clubs by the following steps.



Select one or more clubs, and click on the Run Report icon on the ribbon, and then select the option for CS Annual Health Check form. The printed form will then be generated as a PDF document which can be downloaded and printed as required.

If you are sending a paper copy of the Printed form to a club, you will probably also want to record that it has been printed within CRM. From the view of FA Charter Standard Annual Health Check forms, double click on the form required to open up the record.

The screenshot shows the "Annual Health Check Application" form for "Beechholme Belles (Youth) - Annual Health Check Application - 2015 - 2016". The form is divided into a "General" section. Fields include: Name (Beechholme Belles (Youth) - Annual Health Check Application - 2015 - 2016), Owner (Surrey FA), AHC Application Status (Not Started), Club (Beechholme Belles (Youth)), CFA (Surrey FA), Season (2015 - 2016), Status (Active), Is Printed (radio buttons for No and Yes, with Yes selected), and Printed Date (empty). A Rejection Reason field is also present at the bottom.

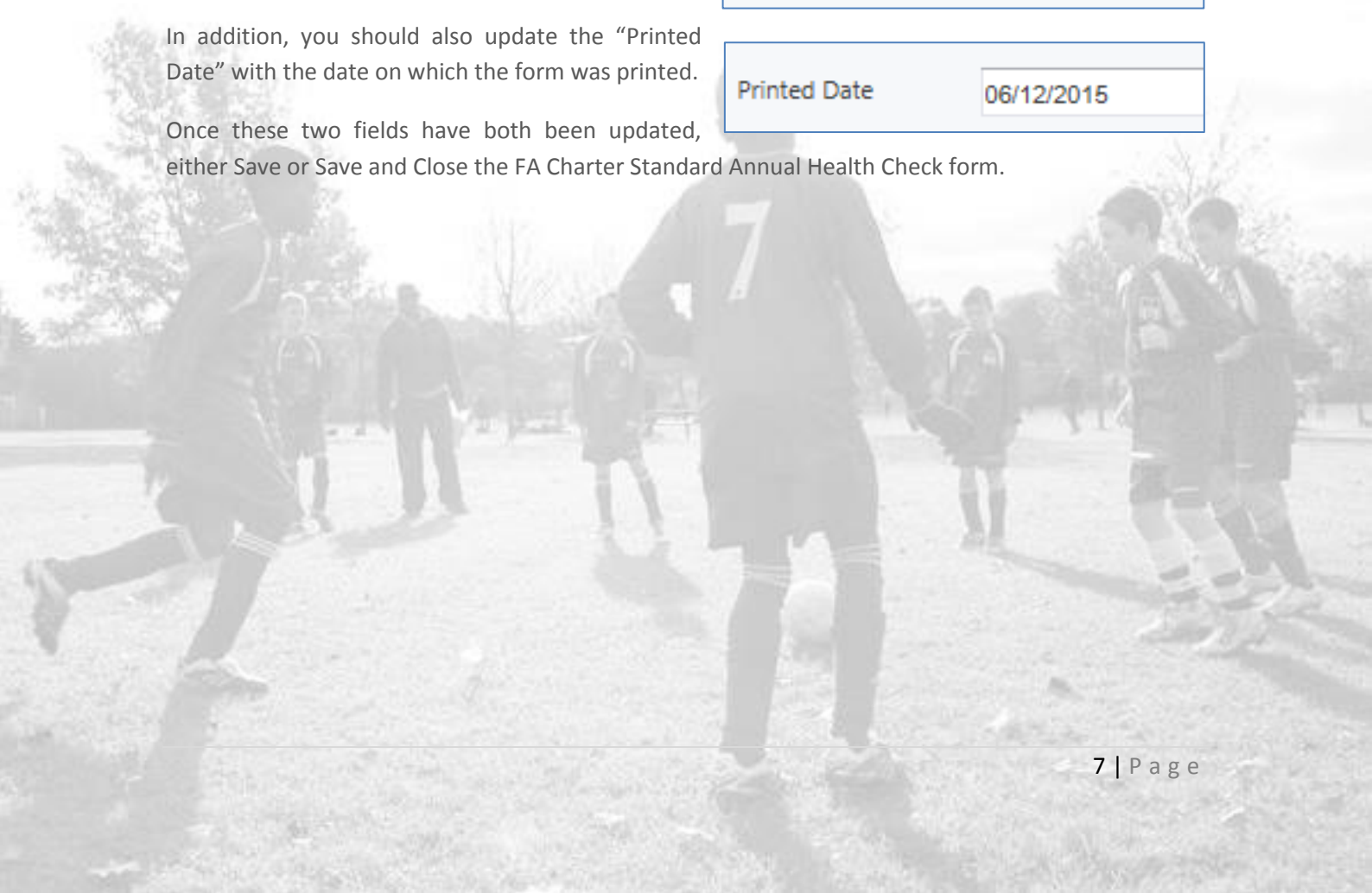
Navigate to the field marked "Is Printed" and check the box marked "Yes".

A close-up of the "Is Printed" field showing two radio buttons: "No" (unselected) and "Yes" (selected).

In addition, you should also update the "Printed Date" with the date on which the form was printed.

A close-up of the "Printed Date" field showing the date "06/12/2015" entered in the text box.

Once these two fields have both been updated, either Save or Save and Close the FA Charter Standard Annual Health Check form.



Reviewing FA Charter Standard Annual Health Checks

To review a FA Charter Standard Annual Health Check form, CFA users should use the WGS Portal to access the form in the same way that a club user will access it. However, the view of FA Charter Standard Annual Health Check forms in CRM can be used to monitor the progress of these, and once a form has been submitted, the forms can be approved when appropriate within CRM.

To open up a FA Charter Standard Annual Health Check form, navigate to the view of Annual Health Check Forms, and double click on the form required.

Annual Health Check Application
Beecholme Belles (Youth) - Annual Health Check Application - 2015 - 2016

General

Name * Beecholme Belles (Youth) - Annual Health Check Application - 2015 - 2016 Owner * Surrey FA

AHC Application Status * Not Started Club * Beecholme Belles (Youth)

CFA * Surrey FA Season * 2015 - 2016

Status * Active

Is Printed No Yes Printed Date

Rejection Reason

When reviewing and approving Annual Health Check forms, the key field is the “AHC Application Status” field, which is used to record the status of the Health Check.

AHC Application Status * Not Started

The settings for this status are as follows:-

Not Started The form has been created for the club to open and progress, but the club has not yet started the process and saved the form.

In Progress The form has been created and saved by the club, but it has not yet been submitted to the County FA for them to review. This does **not** mean that the Club’s FA Charter Standard accreditation is “In Progress” – only that the form has been saved.

Submitted The club have completed their FA Charter Standard Annual Health Check, and have submitted it to the County FA for them to review. Once submitted, a club can no longer update their action points on Step 3 of the Portal Health Check form, though they can still read them. If a County FA wishes to do so, they can change a “Submitted” Annual Health Check form back to “In Progress” or to “Rejected”, so that the club concerned can make further updates to it.

Awarded The County FA have reviewed the submitted FA Charter Standard Annual Health Check form, and having satisfied themselves of the submission, are happy to set the Annual Health Check as awarded.

Rejected The County FA have reviewed the submitted FA Charter Standard Annual Health Check form, but are not satisfied with the submission, and have decided to reject the form. Once rejected, the club will be able to make further updates to their action points within the form once they click on the icon.

Completed At present this status is not being used, and can be ignored.

Approving FA Charter Standard Annual Health Checks

Once a County FA has reviewed a submitted FA Charter Standard Annual Health Check, they have one of three options – approving the form, rejecting the form, or setting it back to “In Progress” so that the club can continue to update it.

If a County FA sets the status of a FA Charter Standard Annual Health Check form to “Approved”, then the following actions will be automatically processed by the system.

- The date for the next annual renewal will be set for 31st March of the following year (i.e. one year is added to the current renewal date). If the County FA has set a different Suspended date, this will be shown for the following season.
- All teams flagged within the Annual Health Check form as no longer running will be deactivated, and notifications sent to the appropriate leagues/competitions (you will be warned that this process will take place).
- A notification will be sent to Kit Locker to inform them that the fulfilment for the Annual Health Check award is now due.

Rejecting FA Charter Standard Annual Health Checks

Once a County FA has reviewed a submitted FA Charter Standard Annual Health Check, they have one of three options – approving the form, rejecting the form, or setting it back to “In Progress” so that the club can continue to update it.

If a County FA sets the status of a FA Charter Standard Annual Health Check to “Rejected”, then they will also be required to put a reason into the “Rejected” field on the Annual Health Check form, explaining why the application was rejected.

When re-entering the Portal, the club will see that their Annual Health Check has been rejected on the Annual Health Check symbol on the left hand side of their dashboard. By clicking on the icon the Annual Health Check will be reset to “In Progress” and the club can then edit the information originally completed on the rejected form and resubmit it.

Suspended and Lapsed FA Charter Standard Clubs

A club may have its FA Charter Standard Status set as either Suspended or Lapsed if it has not submitted its FA Charter Standard Annual Health Check form on or before the date set by the County FA. If the form has been submitted, but not yet approved by the County FA, then the FA Charter Standard Status will not be updated and the club will not have its FA Charter Standard Status set as Suspended or Lapsed.

A club may still access and update its FA Charter Standard Annual Health Check form whilst their status is Suspended, but cannot do so once it has been set as Lapsed – if a club’s FA Charter Standard Status is Lapsed, then the club will need to complete a new FA Charter Standard Application to get their FA Charter Standard re-awarded.

Checklist for Club Setup for FA Charter Standard Annual Health Checks

There shouldn't be a need for counties to set up clubs to do their FA Charter Standard Annual Health Checks through the Whole Game System Portal. However, if clubs are reporting any issues with accessing their Annual Health Check you should check the following:-

- Only Secretary, Chairman, Charter Standard Co-ordinator and Welfare Officer can access.
- The club concerned must have its FA Charter Standard "Status" field set as "Awarded" – if this is not awarded, the system does not think the club is due to have a Health Check.
- The club concerned must have its FA Charter Standard "Due Date" within the current season (e.g. for season 2015-16 this should be 31st March 2016).
- The club concerned cannot have a "Parent Club" set (this can be found in the Club details section in CRM). If the club has a parent club, then the FA Charter Standard Annual Health Check form will appear under that club in the Portal.
- If the club concerned has "linked clubs", ensure that the FA Charter Standard "Status" and "Due Date" (see above) for the linked clubs match those for the parent club.
- The club concerned, and any linked clubs must be affiliated (this can be found in the Club Details section – it must have an affiliation membership) and must also be active.

