



2020-21 GOVERNING SEASON CLUB ADMIN CHECKLIST PHASE 14 – MEMBERSHIP UPGRADES/PURCHASE and SEND CLUB ASSIGNMENTS

Creating Groups and Smart Groups (refer to [Phase 10](#))

Member Directory (refer to [Phase 2](#) and [Phase 6](#))

Pre-determine who will be receiving an assignment request and confirm they are in your club's Member Directory.

- If not, [import members](#) into your member directory before continuing.

General guidelines on Selecting Membership Type with Club Assignments

- *Born before June 30, 2002 –*
 - **20-21 NCR Full Coach Membership**
 - **20-21 NCR Full Adults w/Junior Program – Non Coaching Role**
- *Born between July 2002 – June 2003*
 - **20-21 NCR Full Junior Player – 18s age definition only**
- *Born after July 2003 –*
 - **20-21 NCR Full Junior Player – 17 and younger age definitions**
 - **20-21 NCR Full Junior Manager**

OPTION 1 - Club Membership Assignments

Membership assignments are sent to your club's potential players. If the member accepts the invitation, the player is locked into your club and is not able to purchase additional memberships without USAV approval.

Send Club Assignment Requests:

1. Log in to your SportsEngine HQ.
2. From the left navigation menu click the **USA Volleyball** tab.
3. Click **Memberships**.
4. To the right of the membership you wish to share, click the **three verticle dots > Send Club Assignment Request**.
5. Search for people, groups, or rosters within your directory by typing their name and send them their membership invite.
6. Only groups of 50 people or less will populate in the

Send Club Assignment Request ×

From

To

Participants must already exist within your directory.

Subject

Message

Welcome!
North Country Demo Site is requesting you to be assigned to their club for the current North Country Demo Site season. To secure your assignment, click the accept button below. If you will not be participating with North Country Demo Site, you can simply ignore this email.

Add a custom message (optional)

Please be aware of North Country Demo Site's policies as your assignment cannot be changed after acceptance. Only accept this assignment if you will be participating with this club this season.

If you don't currently have 2020 AES Membership Test, you will be required to purchase one when accepting this assignment.

7. Members will receive an "Accept your Assignment Request from *your club's name*," they can then click **Accept Assignment**.

8. If the individual does not already have a membership purchased, they will be directed to purchase a membership before the association is complete. Members will receive an "Accept your Assignment Request from *your club's name*," they can then click **Accept Assignment**.

IMPORTANT – if Fall Membership already purchased by participant, then email address needs to be the same email address associated with the Fall Membership for the upgrade to occur for FULL Membership

OPTION 2 Member Directory – Edit Columns

1. Sign in to your account and go to "SportsEngine HQ".
2. On the left-hand navigation bar, click **Members > Directory**
3. Import Club Participants (Reference [Phase 2](#) and [Phase 6](#) on how-to) if not already completed

REMINDER Parents Assistance REQUIRED – Purchasing Membership
SportsEngine and USA Volleyball require that a parent purchase the membership for the child. How to ensure that this occurs:

- Parent has a SportsEngine account
 - Parent is the head of the SportsEngine "household" account
 - Parent can add household members to the account "add child"
- IMPORTANT** on purchasing a membership for a youth, junior level player
- Use athlete's first name and last name
 - **IMPORT parent's email address when IMPORTING JUNIOR MEMBERS INFORMATION**

4. From the **Member>Directory** select the 3 horizontal buttons next to "ADD GROUP" and select **Edit Columns**
5. Select **SportsEngine Profile**
 - a. Add **Date of Birth**
 - b. Add **Email (parent/guardian/adult in household email)**
 - c. Add **Profile Status**
6. *If any of your club participants have purchased a Fall Membership and that Fall Membership has been assigned to your club, then step 7 applies to you. If no one in your member directory has a membership that is associated with your club, then go to step 8.*

7. Same area as **SportEngine Profile**, now select “**Membership**” (this has been a finicky feature so refreshing browser, logout, log back in if needed)
 - a. Choose Source – select one at a time the memberships type that your participants have purchased and need to upgrade to a full membership (example, Fall Adult Coach, Fall Adult w/Junior Program, Fall Junior Player, Fall Junior 18s Player)
 - b. For each membership type selected, add **Membership Status** (this will allow you to see who has/has not purchased a current membership and the email address associated with the membership purchase). It will also let you know which participants membership is affiliated with your club.
 - c. For participants who have **PAID** associated with their name, it means they have a current membership and the current membership is associated with the email listed in the “email” column and the membership is associated with your club
8. Select **DONE** (bottom right)
9. Sort Columns by **Date of Birth** (select arrow up or down to place member directory names in chronological order by date of birth)
10. **Send Club Assignment and Membership Purchase at the same time**
 - a. Date of Birth and Role will determine which membership should be selected for participants
 - b. Only **25 participants at one time** can be sent a “send club assignment” and “membership purchase” at a time
 - c. Check the box next to participants who meet the Date of Birth and Role requirements for each membership.

General guidelines

Born before June 30, 2002 – 20-21 NCR Full Coach Membership or 20-21 NCR Full Adults w/Junior Program – Non Coaching Role

Born between July 2002 – June 2003 – 20-21 NCR Full Junior Player – 18s age definition only

Born after July 2003 – 20-21 NCR Full Junior Player – 17 and younger age definitions or 20-21 NCR Full Junior Manager
FALL MEMBERSHIPS are LISTED BUT NOT AVAILABLE FOR PURCHASE

11. Select box(es) next to the name(s)
 - a. Who will be coaches in your club
 - b. If a coach has a Fall Membership and that membership is associated with your club (SEE 7c), then make sure to click that box
12. Select **Send Club Assignment Request**
13. Select **20-21 NCR Full Coach Membership**
14. Select **NEXT**
15. Can edit/update **Subject** and/or **Custom Message**
16. Select **SEND**
17. Repeat **11-16** for each membership type



WHAT HAPPENS NEXT WHEN ALL IS PERFECT

- Email (parent's email) will receive the club assignment request. This can be accepted from the email or can be accepted by the parent navigating to their SportsEngine household (login to Sports Engine, click upper right account icon, select My SportsEngine)
- If the member needs to purchase or upgrade membership, then it will request that a membership be purchased
- Once purchased, your club participant and his/her membership has been assigned to your club

POTENTIAL HICCUPS

- Email associated with fall membership is not the same as the full membership and therefore purchase price will be incorrect. Contact Region