

Registration

Registrars should be familiar with Parts 2 and 5 of the USMS Rule Book.

Contacts & Resources

Order additional registration cards, direct questions about monthly invoices or accounting statements, or magazine subscriptions to:

Membership Coordinator
Tracy Grilli
PO Box 185
Londonderry, NH 03053-0185
Phone: 941-556-6282 or 800-550-SWIM
Fax: 603-537-0204
Email: USMS@usms.org

Direct questions about registration software to:

Membership Director
Anna Lea Matysek
655 N Tamiami Trail
Sarasota, FL 34236
Phone: 941-556-6279
Email: AnnaLea@usms.org

Direct questions about registration policy to:

USMS Registration Committee Chair
Leo Letendre
RegChair@usms.org

Read information, instructions, and tutorials for LMSC Registrars:

www.usms.org
Administration >> Guide to Operations
<http://www.usms.org/admin/lmschb/>
Software tutorials:
<http://www.usms.org/admin/lmschb/content/catutorial>

Converse with other Registrars:

Registrars Discussion Forum
www.usms.org >> Home >> Discussion Forums
You must have a login ID as this is a private forum

Report registration software problems:

regissue@usms.org

2012 Fees

	USMS Fee	USMS End-of-year fee (Sept 1 to Dec 31, 2012)
Club Registration Fee	\$30.00	-
Individual Member Registration Fee	\$31.00	\$26.00
One-Event Registration Fee	\$12.00	-
Transfer Fee	\$1.50	-

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- A. The club registration fee (fee to register a club for the year) is \$30.00.
- B. For members registering from November 1, 2011 to August 31, 2012, the fee payable to USMS is \$31.00. The member's registration expires on December 31, 2012.
- C. For members registering (for 2012) from September 1, 2012, to December 31, 2012, the fee payable to USMS is reduced to \$26.00. (This is called an "End of Year" registration.) The member's registration expires on December 31, 2012. LMSCs may also choose to reduce their "End of Year" registration fee.
- D. For members registering for one event, the fee payable to USMS is \$12.00. (LMSCs are not required to offer one-event registration.) Members or registrars do not have access to perform this task via the Member On Line Registration Interface Software.
- E. For members converting from a one-event registration to a full 2012 membership, the fee payable to USMS is the difference of the full fee minus \$12.00 (in other words, it is \$19.00 until August 31, 2012, and \$14.00 from September 1, 2012 through December 31, 2012). Members must convert within a month of the one-event registration. Members will not have access to perform this task via the Member On Line Registration Software. The registrar must complete this conversion via the Club Assistant Registrar Interface Software.
- F. For members transferring membership from one club to another, the fee payable to USMS is \$1.50. Members do not have access to perform this task via the Member On Line Registration Software. The registrar for the LMSC into which the member is transferring, must complete this conversion via the Club Assistant Registrar Interface Software.

Registration Software

Tutorials: <http://www.usms.org/admin/lmschb/content/catutorial>

Registrations of members and clubs are implemented via a web based software application provided by Club Assistant. There are two different interfaces to Club Assistant's software - one for registrars and one for members.

- A. The LMSC registrar is given a user ID and password to carry out registration duties using the Club Assistant Software Application. The Registrar must not share that ID and password with anyone else, as it is the sole responsibility of the Registrar to handle USMS registrations and personal information of its members. The first time a new Registrar logs in, the software will require the Registrar to electronically sign the USMS Confidentiality Agreement.
- B. The Registration software maintains a database for new registration of all individuals and renewals for all members who have been assigned a permanent ID. The Registration software also will register clubs and maintain a database for clubs registered since 2007.
- C. The software generates and assigns a USMS ID number for each new member registered, and maintains the member's permanent ID for renewals. The last five characters of the number comprise the member's permanent ID number. The software will retrieve the permanent ID for any member, nationwide, who has previously been assigned a permanent ID (to avoid generating a duplicate ID for that member).
- D. The software is a real-time application with a database maintained by Club Assistant (every time a member is registered, the information is available to every registrar and the USMS National Office). The Registrar Interface will generate reports of member registrations and fees that can be selected by a range of dates and fee types. It also creates two summary reports (Club and Member Registration Summary), one for credit card receipts entered by the member from the online application and one for cash/checks processed by the registrar. Both provide the members' names, addresses, phone numbers, email addresses, and registration data.
- E. The main report is the Club and Member Registration Summary report. This report can be run after the end of each month by either the registrar or the treasurer. The report shows the funds owed to the National Office for that month from cash/check receipts, as well as the amounts owed to the LMSC (from USMS) from credit card receipts.. The National Office will account for those funds from the real time database during the same monthly period that closes at 11:59 pm Pacific Time.

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- F. Specific reports using individual option fields can be used to select individuals for rosters and mailing labels. The workout group field can be included on the registration card or mailing labels.
- G. The format of reports is user-selectable. Reports can be saved to disk in an Excel format.
- H. The roster and label options include sorting on a number of criteria, including the optional fields. The labels can be sorted in bulk mailing order.
- I. The software accommodates donations to the USMS Swimming Saves Lives Foundation and ISHOF Foundation. It can also be set up to collect LMSC fees, club member fees, LMSC donations, and LMSC/club transfer fees. The software will also allow LMSCs to specify end-of-year (September and October) discounted LMSC, Club, and Transfer fees. These LMSC and Club yearly fees that were specified will be collected and summarized by the software for periods that the registrar can specify.
- J. For online registrations, the Club and LMSC fees will be returned to the LMSC's treasurer on a monthly basis. Likewise USMS will bill the LMSC for the USMS fee and donations entered (from paper registrations) on a monthly basis. The treasurer should distribute club fees and local donations (should they be collected) based on the monthly report of those fees that were collected (see item D above).
- K. Check-off boxes for coaches, opt out for email, magazine, and sponsor postal mailings (only available in the Registrar Interface), the USMS magazine, and officials exist in the application.
- L. Fields exist for customization by the registrar so that questions may be included in the Member Interface for a topic unique to an LMSC (such as whether a member wants to receive a local newsletter). These fields may also be used just by the registrar, without being displayed during the online registration process.
- M. For those LMSCs that have clubs with associated Workout groups, the Software allows selection of the Workout group. The software will not allow collection of any fees associated and unique to a Workout group.
- N. The name/abbreviation of workout groups, may, at a registrar's set up of the Registration Software, appear on the right-side fold of the registration card set.
- O. The Registration Software is not able to handle one-event registrations and conversions. Instead, for each One Event registration held during the month, a summary Excel spreadsheet should be sent to the National Office. The \$12.00 per participant fee will be billed to the LMSC along with the monthly invoices sent from the National Office for cash/check receipts for normal registrations. See One Event Registrations in this document for the suggested format of registration data to send to the National Office.

LMSC and Club Registration Procedure

LMSC Registration:

- A. Submit a list of your current LMSC officers to the National Office (AnnaLea@usms.org) by December 31st of each year. Updates should also be sent to the National Office any time you have new officers.
- B. The official name and number of each LMSC is listed in the USMS Rule Book, and should be used in contacts with members and the National Office. Only the House of Delegates has the authority to change the name of an LMSC.

Club Registration:

Tutorials: <http://www.usms.org/admin/lmschb/content/catutorial>

- A. **Existing clubs** must re-register each year before any member can register for the current year with the club. Clubs may register starting in October and must be registered by November 1st of each year so new members can register on line with the club. The National Office will send electronic renewal notices, which contain customized renewal links, to each club that was registered during the previous year. The club may renew its membership online with a credit card.

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- B. If the club is unable to renew online, it should complete a *Club Membership Application* (suggested form is in the USMS Guide to Operations online) and return it to the LMSC registrar with a check made out to the LMSC. Once the club registration form and check is received, the LMSC registrar should enter it for the new year as soon as possible and by November 1st via the Registrar Interface Software.

NOTE: A club **must** be registered before individual members can be registered with that club. If a member wishes to compete but his/her club has not yet registered, the registration must be submitted as “unattached.” The On Line Registration System will not list the club for the current year unless it has been registered by the registrar via the Registration Software.

- C. **New clubs** may register at any time by completing the *Club Membership Application* and submitting it, with a check made out to the LMSC, to the LMSC registrar. New club abbreviations must be confirmed by the LMSC registrar to avoid duplication of abbreviations.
- D. A club’s number as listed in the USMS Database is **XXY-ZZZ**:
XX=LMSC number,
Y=Last digit of the year
ZZZ=Club number
Example: Club XYZ had the number XX7-015 in 2007. Club XYZ will have the number XX8-015 in 2008.
A club number of "XXY-000" is used to indicate “Unattached”.

NOTE: This numbering system does not show up on a member’s card. The card has the Club number – Club Abbreviation.

- E. Clubs maintain the same number and letter abbreviations from year to year. If a club goes “dormant,” its number should NOT be reassigned to a different club. If the club “resurfaces” and re-registers at a later date, it should be reassigned its original club number. [NOTE: this is a new philosophy for USMS. It is intended to aid the processing of Top Ten.]
- F. **Club Abbreviations:** The 2 to 4 letter club abbreviation, once verified by the LMSC registrar as being available, must be maintained throughout the registration year. The only time a club may request a new abbreviation is prior to the November 1st renewal time, and if available, it will be changed for the new registration year effective November 1st. If a request is made for a club abbreviation that was previously used, but has not been used in the previous 5 years, that abbreviation is available. It is advisable to make every attempt to contact the previous owners of the abbreviation to determine whether they are planning to renew that abbreviation for the current year. The National Office must be contacted to change a club’s abbreviation, as changes must be made “behind the scenes” in both the Club Assistant database and the USMS database.
- G. Update changes to club officers throughout the year in Clubs menu of the Registration Software.
- H. Workout Groups associated with Clubs can be listed in the Registration Software by the registrar.

Annual Memberships - Registration Procedure

Tutorials: <http://www.usms.org/admin/lmschb/content/catutorial>

New Paper Registrations:

- A. Review the member’s *2012 One Year Membership Application* form (suggested form is in the Guide to Operations online) for accuracy, making sure that the liability release is properly signed and enter information into the Registration Database. Distribute registration cards to members as soon as possible.
- B. Note that the waiver statement on the registration forms MAY NOT be modified. Refer to Article 204 of the USMS Rule Book.
- C. Register a member by choosing Registration >> Enter the name in the Search Box and select the year >> Choose the appropriate member once Search has completed, and enter appropriate fees and donations and click the “Done” button. During the November and December period when discounted registrations are still allowed, the previous year may be chosen, e.g., on December 15th, 2011, a registrar may choose a discounted 2011 registration or a full

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2012 registration. Effective January 1st, only the current year is allowed. Note: A member registering online only has a choice of the current year, i.e., a November 2011 registration will register the member for 2012.

- D. The USMS registration software will assign a registration number to each member. An individual's registration number consists of the two-digit LMSC number, the last digit of the registration year, an additional character, a hyphen, and another five characters. ("Character" means alphanumeric.)

Example: XXYA-BCDEF
 XX=LMSC number
 Y=Last digit of year (2003=3)
 A= a unique character that is a checksum of all characters to verify that the registration year
 BCDEF=alphanumeric characters; this sequence of five characters is the member's permanent
 ID and will not change from year to year.

- E. Registration cards print out automatically on your computer's printer from a PDF formatted file created by the registration software. If cards are lost, they are easily printed again by selecting the member checking print new card or a member can be emailed the link to print their own card (Choose the link for membership card, or Compose email and the link will be inserted into the email).

Paper Renewal Registrations:

Follow the same procedure as described above for registering a new member. When you get to the member registration screen, you can enter the member's permanent ID number. This should pull up the member's data (name, address, etc.) from the last time the member registered.

Transfers:

- A. A member must wait 60 days after competing for one club before affiliating with a new club, except at the time of annual renewal. Transfer fees do not apply to members who change club affiliation at the time of renewal.
- B. A member must complete an *Application for Transfer of Club Membership* form (available is in the Guide to Operations online) and submit it to the registrar of the LMSC in which the new club is located (it may be the same LMSC).
- C. If a member has transferred to another LMSC, the real time Registration Database will automatically have the member's association with the new LMSC listed at the time of transfer. Printing of reports for your LMSC will no longer list the member who has transferred out of your LMSC.
- D. The registration Software reports will include appropriate transfer fee with their registration summary for payment to the national registrar.

Tryout Period:

Unregistered swimmers may try out a USMS club before joining the organization. One tryout period per swimmer is allowed, and must not exceed 30 consecutive days. During the 30-day tryout period the swimmer may participate in *swim practices only*. (An unregistered swimmer may separately participate in a single event via one-event registration if the LMSC supports this optional program. See the One-Event Registration Procedure section.)

A swimmer who has been previously registered with USMS in a prior year *is not* eligible for the 30-day tryout.

Each tryout swimmer must fill out the standard membership application form. The coach or contact person should make sure that the liability release is properly signed, write "30 Day Tryout" in the margin, and retain the form for the 30-day period. At the end of the tryout period, if the swimmer elects to join USMS, it is then a simple matter to cross out the annotation, attach the check, and forward the application to the local registrar. (Alternatively, the swimmer could register online.)

The purpose of the 30-day tryout form is to maintain USMS insurance coverage for the USMS-registered members of the club. Note that the club's workout insurance coverage **does not** cover the person trying out.

Name Changes

When members change their names for any reason, change the name in the member's record and enter a note (containing the old and new names) in the Notes area of the online member record.

Verification of a member's age

1. Sometimes a registrar will receive an application where the member's listed date of birth (DOB) is very different from a previous year's registration (not a simple typographical error). The registrar needs to verify the member's real date of birth, and it may require the registrar to request proof such as a photocopy of a driver's license, passport, or other documentation.
2. If it appears that it could be a typographical error, previous year registration forms can be viewed to verify the DOB, and corrected accordingly, or the member can be contacted.
3. If the member has competed in an event with the DOB that is in question, the member should be contacted and the DOB verified by the member providing legal identification documentation.
4. Note, the Registration Software will not allow a member to renew their registration with a different DOB than what is already in the system.

One-Event Memberships - Registration Procedure

One-Event information in the USMS Guide to Operations:

<http://www.usms.org/admin/lmschb/content/oevt>

Policy:

One-event registration is an optional policy that an LMSC may use to register members for a one-time-only event, such as a swim clinic, a meet, or an open water swim. (An event that spans consecutive days, such as a two-day swim meet, counts as "one event.") One-event registration will be a paper process and the LMSC registrar must input the information manually into a spreadsheet and send the information to the National Office after the event's directors have provided the information to the registrar. The suggested format for sending the One Event Report to the National Office follows, listing one member per row, preferably in a spreadsheet:

Lname, Fname, MI, Address, City, ST, ZIP, Phone, DOB, Age, Sex, Reg/Event_Date, Email_address

It is suggested that the meet director fill out the spreadsheet and forward it to the LMSC Registrar.

USMS strongly encourages LMSCs to follow up with one-event registrants to encourage them to join USMS. USMS encourages conversions to full membership within a month of the event and will discount the full registration fee by the \$12 one-event fee. It is up to the LMSC to decide whether any LMSC fees are credited against full registration.

Member requirements:

Members must sign and date the *One-Event USMS Registration Application* (available from the National Office), which must include the liability release and the member's name, address, and date of birth. A check for \$12.00, plus additional LMSC fees (if applicable), made out to the LMSC, must accompany the application.

Event director:

- A. A one-event member may not represent any club and must be listed as "OEVT" on the heat sheet and in the results.
- B. Use the *One-Event USMS Registration Application* or add the words "One Event" to standard membership applications, indicating the start date of the event.

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- C. Event Directors must do due diligence to ensure that the One Event Registration form is completed with the member's name, address, date of birth, and is signed and dated.
- D. Event directors must forward all OEVT applications to the LMSC registrar at the completion of the event, along with the filled-out spreadsheet and the appropriate payment to the LMSC registrar (\$12 USMS fee + local fee for each participant).

Note: OEVT registration is strictly for insurance coverage for the day/event, and no other benefits accrue including relay participation and recognition of competitive results.

LMSC registrar:

- A. Keep a *separate* file of one-event registration applications for a minimum of six (6) years.
- B. You may choose to assign a special one-event registration number to each member and add it as a column in the example above. As an example, XX for the LMSC ID number, Y for a year, the % sign, then a sequence, 139%-0001 for LMSC 13 (NC) for the first One Event Registration in 2009. For the registration date, use the date of the event in which the one-event member participated (use the *first day's* date if the event spanned more than one day).
- C. Contact each OEVT member as soon as possible after the event. Extend an invitation to convert their OEVT membership into a full USMS membership, with a credit for the \$12.00 that was already paid for the OEVT registration. Make sure to say that this conversion is only available for 30 days after the date of the OEVT registration, and that the member will have to mail a check for the difference in price to the LMSC Registrar.
- D. If any members convert, register them as full members in the Club Assistant software. Take their previous \$12.00 payment and include them in your registration deposit, along with the check they sent for the difference in price.
- E. After 30 days have elapsed since the event, submit the remaining OEVT registrations to the National Office by emailing the spreadsheet to USMS@usms.org. Do not send any money or registration forms. The National Office will bill the LMSC as part of the monthly accounting process.
- F. A one-event member converting to a full membership may only do so within the same membership year. In other words, a member could not register with a one-event membership in October, 2010, and convert that to a full 2011 membership in November, 2010 at the reduced (offset) cost for a 2010 membership.

Suggested LMSC responsibilities:

Each one-event registrant should be provided with a packet of information to highlight the benefits of joining USMS. Included in the packet may be any of the following:

- A. Informational brochure from USMS and any material describing the LMSC's activities (e.g., a sample newsletter or local brochure).
- B. A membership reduction coupon to be used toward offsetting the annual cost to USMS. The membership coupon would be valid for only 30 days after the date of registration, which will be indicated on the coupon by the meet director. The value of this coupon will be determined by each individual LMSC and redeemable only in the LMSC of issue.
- C. Registration form for that particular LMSC for full membership.

Items to Note

Foundation donations:

Members may designate on their registration forms a donation of \$1 (or more) to the USMS Foundation or the International Swimming Hall of Fame (ISHOF). The donations will automatically be tallied by the Software in the registration summary.

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USMS Magazine:

The USMS national magazine is included with all USMS annual registrations. If a member requests not to receive the magazine, there is a field in the software to exclude the magazine. In the member form screen, click "Exclude USMS Swimmer Magazine." There is *no* discount if a member does not want the magazine.

Additional mailings and emails:

Some members may request that their name not be included on miscellaneous mailing lists. There are fields in the Registrar Software to address these exclusions. Check the appropriate box.

Please take special care to avoid the following common processing errors:

- A. The Registration Software absolutely *will not* accept a member's registration if the birthdate has not been provided.
- B. Birthdates must be accurate. *Please make every effort to obtain the correct birthdate* before submission to the Registration system. DO NOT "INVENT" BIRTHDATES!
- C. Members must be at least 18 years of age. If a younger member is entered the program will indicate the error.
- D. The Registration Software CANNOT process the registration of a member attached to an unregistered club. If a member wishes to compete but the club has not yet registered, the registration must be submitted as "unattached." The member can then transfer (paying any applicable fees) once the club has registered.

Other Important Responsibilities of the LMSC Registrar

from the Management of Corporate Documents section of the USMS Guide to Operations
<http://www.usms.org/admin/lmschb/>

Registration/Membership Forms

1. Save original forms with signed liability releases for a minimum of six (6) years to be safe (actual statute of limitations for filing a personal injury or wrongful death or other related lawsuit varies from state to state and will affect storage time). Scanned registration forms are an acceptable substitute for hard copies. These files must be backed up and stored.
2. Save a year end registration membership list and store it along with the saved original signed liability release forms

Hard copy reports/lists and electronic reports/lists

1. Archive old registration lists (both physical hard copies and electronic file lists) in a secure location with backup copies in a separate location from the registration program location
2. Store current registration lists and electronic file lists and monthly or periodic updates for the registration year in two secure locations, one of which is separate from the location of the registration program

USMS membership information

1. Membership information which should not be posted in an accessible areas includes birthdates, addresses, telephone numbers, and E-mail addresses due to privacy requirements and identity theft concerns. The Registration Software provides links to display current member registrations for clubs as well as workout groups. This list is current as of the time a member is registered.
2. Partial membership information may be posted in a secure or password protected location for use by meet directors or the LMSC top ten recorder to verify names as listed on USMS card, membership numbers, birthdates, and gender.

Disaster plan

1. Every Registrar is also **STRONGLY** encouraged to have a “disaster plan” on file with someone in the LMSC. If the registrar is somehow incapacitated, the LMSC designee will be able to locate the hard copies of the registration forms, as well as continue the registration process.