

## Registration

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

### Contacts & Resources

*Order additional registration cards, direct questions about specific registration submittals and magazine subscriptions to:*

**Membership Coordinator**

Tracy Grilli  
P.O. Box 185  
Londonderry, NH 03053-0185  
Telephone: (800) 550-SWIM or (603) 537-0203  
Fax: (603) 537-0204  
E-mail: USMS@usms.org

*Direct general questions about registration to:*

**Registration Committee Chair**

George Simon  
10229 Boxelder Dr  
Raleigh, NC 27613-6139  
Telephone: (919) 264-3490 (cell) (919) 847-1877 (home)  
Email: georgesimon@usms.org, RegChair@usms.org

*Direct questions about registration software to:*

**Registration Software Developer**

usms@clubassistant.com

*Direct specific database questions to:*

**National Database Administrator**

Esther Lyman  
E-mail: Registration@usms.org

*Converse with other Registrars:*

**Registrars Discussion Forum**

Go to [www.usms.org](http://www.usms.org), click on "Discussion Forums", you must have an ID as this is a private forum

*Report problems*

regissue@usms.org

### 2010 Fees

- A. There are no fees required to register your LMSC. Submit a list of your current LMSC officers to the National Office (usms@usms.org). For your own use, you may enter your officer's names into the LMSC Settings screen of the Registrar Interface Application, but this information is not automatically transmitted to the National Office.
- B. The club registration fee is \$30.00.
- C. For swimmers registering from November 1, 2009 to August 31, 2010, the fee payable to USMS is \$27.00. The swimmer's registration expires on December 31, 2010.
- D. For swimmers registering (for 2010) from September 1, 2010, to December 31, 2010, the fee payable to USMS is reduced to \$22.00. (This is called an "End of Year" registration.) The swimmer's registration expires on December 31, 2010. LMSCs may also choose to reduce their "End of Year" registration fee.
- E. For swimmers registering for one event, the fee payable to USMS is \$12.00. (LMSCs are not required to offer one-event registration.) Swimmers will not have access to perform this task via the Swimmer On Line Registration Interface Software.

- F. For swimmers converting from a one-event registration to a full 2010 membership, the fee payable to USMS is the difference of the full fee minus \$12.00 (in other words, it is \$15.00 until August 31, 2010, and \$10.00 from September 1, 2010 through December 31, 2010). Swimmers must convert within a month of the one event registration. Swimmers will not have access to perform this task via the Swimmer On Line Registration Interface Software, the registrar must complete this conversion via the Club Assistant Registrar Interface Application.
- G. For swimmers transferring membership from one club to another, the fee payable to USMS is \$1.50. Swimmers will not have access to perform this task via the Swimmer On Line Registration Application, the registrar for the LMSC into which the swimmer is transferring, must complete this conversion via the Club Assistant Registrar Interface Software.

### **Registration Application**

For 2010, registrations of swimmers and clubs are implemented via a web based application provided by Club Assistant. There will be two different interfaces to Club Assistant's Application, one for registrars and one for swimmers.

- A. The Registration Application maintains a database for new registration of all individuals and renewals for all members who have been assigned a permanent ID. The Registration Application also will register clubs and maintain a database for clubs registered since 2007. Current LMSC officers can also be listed.
- B. The software generates and assigns a USMS ID number for each new swimmer registered, and maintains the swimmers permanent ID for renewals. The last five characters of the number comprise the swimmer's permanent ID number. The software will retrieve the permanent ID for any swimmer, nationwide, who has previously been assigned a permanent ID (to avoid generating a duplicate ID for that swimmer).
- C. The Application is a real time application with a database maintained by Club Assistant (every time a swimmer is registered, the information is available to every registrar and the USMS National Office). The Registrar Interface will generate reports of swimmer 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 swimmer from the online application and one for cash/checks processed by the registrar. Both provide the swimmers' names, addresses, phone numbers, email addresses, date of birth, and historical registration data.
- D. The main report is the Club and Member Registration Summary report. This report should be created after the end of each month by the registrar and given to 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 be accounting for those funds from the real time database during the same monthly period that closes at 11:59 pm Pacific Time.
- E. Specific reports using individual option fields can be used to select individuals for rosters and mailing labels. Some of these fields can be included on the registration card or mailing labels.
- F. The format of reports is user-selectable, and the selections can be stored for future use. Reports can be saved to disk in an Excel format that can be read by most word processors, for merging with standard forms.
- G. 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.
- H. The Application accommodates USMS Foundation and ISHOF Foundation donations, and if options are properly set up by the registrar for their LMSC, LMSC donations, club fees, and LMSC/Club transfer fees. The Application 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 application for periods that the registrar can specify. For Swimmer Interface entries, the Club and LMSC yearly fee 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 on a monthly basis. It is the registrar's responsibility to notify the treasurer as to how to distribute club fees and local donations (should they be collected) based on the monthly report of those fees that are reported by the application (see item D above).

- H. 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.
- I. Fields exist for customization by the registrar so that the questions may be available for the Swimmer Interface Application and/or additional fields just for the registrar for unique questions for LMSCs (such as local newsletter distribution),
- J. For those LMSCs that have clubs with associated Workout groups, the Application allows selection of the Workout group. The application will not allow collection of any fees associated and unique to a Workout group.
- K. The Registration Application 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 at the end of the month. 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 on page 5 for the suggested format of registration data to send to the National Office.

### **LMSC and Club Registration Procedure**

#### **LMSC Registration:**

- A. There is no longer a requirement to annually register your LMSC or to pay an annual LMSC registration fee.
- B. Submit a list of your current LMSC officers to the National Office (usms@usms.org) by December 31<sup>st</sup> of each year. Updates should also be sent to the National Office any time you have new officers. For your own use you may enter the officers into the LMSC Settings screen in the Club Assistant application, but this information is not automatically transmitted to the National Office.
- C. The official name and number of each LMSC is listed in the USMS Rule Book, and should be used in contacts with athletes and the National Office. Only the House of Delegates has the authority to change the name of an LMSC.

#### **Club Registration:**

- A. **Existing clubs** must re-register each year before any swimmer can register for the current year with the club. Clubs may register starting in October and must be registered by November 1<sup>st</sup> of each year so new members can register on line with the club. The club should complete a *Club Membership Application* (suggested form is in the USMS Guide to Operations online) and returning it to the LMSC registrar. Please note that the location of the team's pool is requested, to facilitate inquiries at the National Office regarding locations. 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 1<sup>st</sup> via the Registrar Interface Application.

**NOTE:** A club **must** be registered before individual swimmers can be registered with that club. If a swimmer 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

- B. **New clubs** may register at any time by completing the *Club Membership Application* and submitting it to the LMSC registrar. New club abbreviations must be confirmed by the National Office to avoid duplication of abbreviations. Once the verification has been completed, the registrar must enter the information into the Registration Application .
- C. 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 swimmers card. The card has the Club number – Club Abbreviation.

- D. 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.]
- E. **Club Abbreviations** The 2 to 4 letter club abbreviation, once verified by the National Office 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 1<sup>st</sup> renewal time, and if available, it will be changed for the new registration year effective November 1<sup>st</sup>. If a request is made for a club abbreviation that was previously used, but not used in the most recent year, after 3 years of non use the abbreviations become available, however all attempts to contact previous owners of the abbreviation will be made to determine if the old abbreviation is planned to be renewed before the old abbreviation is given to the new club.
- F. Workout Groups associated with Clubs can be listed in the Registration Software by the registrar.

### Swimmer Registration Procedure (Annual Memberships)

#### New Registrations:

- A. Review the swimmer’s *2010 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 swimmers as soon as possible.
- B. Register a swimmer by choosing Registration >> Enter the name in the Search Box and select the year >> Choose the appropriate swimmer 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 15<sup>th</sup>, 2010, a registrar may choose a discounted 2009 registration or a full 2010 registration. Effective January 1<sup>st</sup>, only the current year is allowed. Note: A swimmer registering online only has a choice of the current year, i.e., a November 2010 registration will register the swimmer for 2010.
- C. The USMS registration software will assign a registration number to each swimmer. 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 swimmer’s permanent ID and will not change from year to year.
- D. Registration cards print out automatically on your computer’s printer from a pdf formatted file created by the Registration Application. If cards are lost, they are easily printed again by selecting the member checking print new card or a swimmer 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. If you have a need to type a registration card, please do so as follows:
  - 1. Copy the format exactly as it is in the pdf of the card. **DO NOT HANDWRITE CARDS**
  - 2. **USMS number:** XXYA-BCDEF, as described above.
  - 3. **Club number:** Type as club number-club abbreviation. The LMSC number is not necessary. Example: 1-MOVY. Include *both* number and abbreviation.
  - 4. **Name:** Type last name first, then first name, then middle initial. Put titles or Jr or Sr in the APP field. Typing 2nd, 3rd or 4th is easier to interpret than Roman numerals.

## *United States Masters Swimming*

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5. **Address:** Be sure to include apartment number, if any. Where possible use Apt, Unit, or Suite instead of the # sign. If you must use the latter, make sure there is a space both before and after so the post office OCR systems can interpret it. Do not use periods or commas; hyphens are fine.
6. **USPS Standardized Address:** You can view the proper format for any address by going to the US Postal Service web site: [www.usps.com](http://www.usps.com). Click on "Find a ZIP Code."
7. Registration dates are in the format MM/DD/YY. Example: 7/4/08 or 12/31/08. Birthdates are MM/DD/YYYY Do NOT use 4-JUL-08 or DEC 31, 2008.

### **Re-Registrations:**

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

### **Transfers:**

- A. A swimmer 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 swimmers who change club affiliation at the time of renewal.
- B. A swimmer 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 swimmer has transferred to another LMSC, the real time Registration Database will automatically have the swimmer's association with the new LMSC listed at the time of transfer. Printing of reports for your LMSC will no longer list the swimmer who has transferred out of your LMSC.
- D. The registration Application reports will include appropriate transfer fee with their registration summary for payment to the national registrar.
- E. Make a note in the notes area about the Club change and notify the National Registrar by email about transfers as soon as possible. Include swimmer's name, permanent ID, and old and new club.

### **Tryout Period:**

Unregistered swimmers may try out U. S. Masters with a club. The try out period must not exceed 30 consecutive days in any 12-month period, during which time 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 following.)

To maintain USMS insurance coverage (which covers registered members only), 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. When 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.

### **Name Changes**

When swimmers change their names for any reason, enter a note in the Notes area of the online database and email the National Registrar with the old and new names along with the permanent ID.

### **Verification of a swimmer's age**

1. Sometimes a registrar will receive an application where the swimmer'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 swimmer'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 swimmer can be contacted.
3. If the swimmer has competed in an event with the DOB that is in question, the swimmer should be contacted and the DOB verified by the swimmer providing legal identification documentation.
4. Note, the Registration Application will not allow a swimmer to renew their registration with a different DOB than what is already in the system.

### Swimmer Registration Procedure (One-Event registrations)

#### Policy:

One-event registration is an optional policy that an LMSC may use to register swimmers 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 as soon as possible 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 swimmer per row, preferably in a spreadsheet.

LNAME FNAME MI ADDRESS CITY ST ZIP PHONE DOB SEX LMSC REG/EVENT\_DATE LMSC-ID

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 if any additional fees are credited against full registration.

#### Swimmer requirements:

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

#### Event director:

A one-event swimmer may not represent any club and must be listed as "OEVT" on the heat sheet and in the results. Use the *One-Event USMS Registration Application* or add the words "One Event" to standard membership applications, indicating the start date of the event. Event Directors must do due diligence to ensure that the One Event Registration form is completed with the swimmer's name, address, date of birth, and is signed and dated. Event directors must forward all OEVT applications to the LMSC registrar at the completion of the event, along with 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 swimmer 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 swimmer participated (use the *first day's* date if the event spanned more than one day).

- C. A one-event swimmer converting to a full membership may only do so within the same membership year. In other words, a swimmer 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. Since the conversion rate is very low, the Membership Application software does not have the ability to convert One Events to full membership. As a registrar, you should register the swimmer as a full registration at the full year price (\$27) USMS fee, and notify the National Office of a credit that is due to your LMSC for this conversion.

### **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.

### **Monthly Submission to National Office**

**There are no longer submissions to the National Office: For paper registrations, the LMSC registrar must have entered the new and renewal registrations into the Registrar Interface of the On Line System by the following dates for magazine subscription cutoffs.**

Each registrar should strive to enter as many registrations as received by the month end cutoff for the update to the National Office. Note December 31<sup>st</sup> year end close out, paper registrations in your possession must be entered as required by controller for financial year end accounting.

If One Event registrations were available during any of the monthly periods, please email to the National Office the report by the end of each month.

<b>Date Due</b>	<b>Deadline to Receive USMS Magazine</b>
November 30, 2009	January/February 2010 Issue , month end summary
December 31, 2009	2009 Year End Close Out, Year end summary
January 31, 2010	March/April 2010 Issue, month end summary
February 28, 2010	Month end registration summary
March 31, 2010	May/June 2010 Issue, month end summary
April 30, 2010	Month end registration summary
May 31, 2010	July/August 2010 issue, month end summary
June 30, 2010	Month end registration summary
July 31, 2010	September/October 2010 Issue, month end summary
August 31, 2010	Month end registration summary
September 30, 2010	November/December 2010 Issue, month end summary
October 31, 2010	Month end registration summary
November 30, 2010	January/February 2010 Issue, month end summary

### **Foundation donations:**

Swimmers 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 Application in the registration summary.

### **USMS Magazine:**

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

### **Additional mailings and emails:**

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

### **Items to Note**

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

- A. The Registration Software absolutely *will not* accept a swimmer’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. Swimmers must be at least 18 years of age. If a younger swimmer is entered the program will indicate the error.
- D. The Registration Application CANNOT process the registration of a swimmer attached to an unregistered club. The LMSC registrar should hold registrations of individuals until their club has registered for the current year. If a swimmer wishes to compete but the club has not yet registered, the registration must be submitted as “unattached.” The swimmer can then transfer (paying all applicable fees) once the club has registered.
- E. Update changes to club officers throughout the year in Clubs menu of the Registration Application.
- F. Make all changes & updates to swimmers information through the online applications in the update screens. It is NOT necessary to also send changes to the National Office.
- G. Common errors on cards not produced by the Registration Application include:
  1. Omitting club number or club abbreviation.
  2. Not printing name with last name first.
- H. The name/abbreviation of workout groups, may, at a registrar’s set up of the Registration Application, appear on the right-side fold of the registration card set.
- I. The Club Assistant Application has backup procedures in place for data entered into the system. As a registrar, if you use other software to record checks received, you are encouraged to back up your data on a routine basis!
- J. 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.
- K. Note that the waiver statement on the registration forms MAY NOT be modified. Refer to Article 203 of the USMS Rule Book.

## **Other Important Responsibilities of the LMSC Registrar**

*from the Management of Corporate Documents section of the USMS Guide to Operations*

### **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 Application 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.

### **LMSC contact information**

1. Obtain permission of LMSC officers before posting contact information on the LMSC web site or before transmitting it to the USMS National Office for posting on the USMS web site.
2. Consider listing “encrypted” or partially disguised e-mail addresses on the LMSC web site to deter E-mail address harvesting programs
  - a. use (AT) instead of “@” when listing address
  - b. use (DOT) instead of “.” when listing address
  - c. other ways to disguise or encrypt addresses