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### Team Sideline Exporting:

- USA Softball Report Export & Custom Setup
    - Reports>Report Exports>
    - *Customer>Custom>USA Softball Volunteer/Player*
      - Save a custom copy with your volunteers enrollment fields pre-filled
  - Exporting
    - Select the current Program
      - Player or Volunteer export
      - Update Date Range as appropriate
      - Export
- ★ Detailed Video Walkthrough > [TS Export Reports for USAS 4:26](#)
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### USA Softball Uploading:

- Upload Intervals Best Practice:
  - ◆ Midway through your regular registration \*check with Cassi to be sure USAS is ready. Head start for many volunteers completing their BG & SS
  - ◆ Close of your regular registration
  - ◆ Weekly thereafter while accepting waitlist players or new volunteers
  - ◆ Real time for any in-season additions
- Scrubbing Reports, **0:00 - 4:42**
  - ◆ Be sure all data sets are complete and accurate
    - DOB's, Address & Zip, Full Name (no nicknames), contact info
  - ◆ **Sheet1** - this must be the **exact** name of your report sheet for a successful upload
- Upload via Registrar USAS login, **4:43 - 8:03**
  - ◆ Be sure you go to the current Year, League & Season (Spring, Fall, etc)
  - ◆ HomePlate>My Leagues>2023 Spring>Upload
    - Select player or coach & upload the appropriate file
  - ◆ If everything was done correctly you'll now see a "generate invoice" button that was not there before - this is for your new uploads



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→ Invoice Payment Processing, **8:03-10:49ers**

- ◆ Pay with PayPal as you complete each upload - this is the fastest route
- ◆ Give treasurer your Registrar login and instructions on where to find unpaid invoices so they can login and make payments
- ◆ Download & Email copy of your invoices to your treasurer and Cassi at USAS requesting payment and notice once payment is received by Cassi so you can follow-up with Coaches who have received a welcome email to begin BG & SS

★ **Detailed Video Walkthrough >** [USA Softball Player & Coach Uploading](#) **10:49ers**

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**Background Checks & SafeSport (BG & SS):**

★ [BG & SS Completion Tips](#): **4:01**

- USAS Status Review & Reporting
  - Key columns
    - **Paid, ✓** = USAS Payment received & Welcome Email to being BG & SS has been emailed to volunteer
    - **BG, ✓** = requirements completed, all clear
    - **SafeSport, ✓** = requirements completed & properly sync'd, all clear
  - Any not marked as **Paid** - signifies they have not been sent their welcome email to begin BG authorization & SS completion
    - Follow-up on your invoice with your treasurer to be sure payment was sent and received by Cassi at USAS
- Non Compliant Coach Report from USAS
  - Export Coach list & delete those with both BG & SS completed
  - copy/paste all emails into bcc
- Keep an eye out for duplicates - any coach listed 2x
- Or one who entered incorrect DOB & now has a new USAS Account but their SS is linked to their old account
- They will have to link their SS to their new USAS account or manually email in SS completion certificates

★ **Detailed Video Walkthrough >** [USA Softball Coach Status Report & Follow up](#) **5:08**



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### Best Practice Tips:

- Set clear expectations up front:
  - ◆ BG & SS must be completed to participate and be on the fields or in the dugouts
  - ◆ Set a clear deadline for them to be cleared: give yourself at least a week of buffer time for stragglers & late additions
  - ◆ Outreach: Midway through your regular registration, At close of registration, weekly thereafter. Daily in final week before practices begin
  - ◆ Communication: Phone, Email, Text - hit them with the trifecta if they're not responding timely. Get their commitment to an acceptable date/time on when they will have their requirements completed.
  - ◆ Helpers: other BOD members, Division Reps, Head Coaches, Managers, etc
- Recourse - coaches pressure points
  - ◆ Let all non compliant staff know the week before taking the fields they are not allowed to be on the fields or in the dugouts until their requirements are met
  - ◆ Withhold team uniforms until all members of that teams staff are compliant
  - ◆ If staff have left the team or are no longer planning to participate; remove them from the roster in TS & let Cassi/USAS know to cancel their registration
    - You won't get a refund but you won't be out of compliance for backouts :)
- Have fun!
  - ◆ We're all volunteers so support each other, be compassionate and do your best!

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### Recap or Q&A:

- Does anyone want to quickly revisit any part of the presentation
- Any questions about anything covered or not covered

***Thank you from your friends at Rocklin Girls  
FastPitch Softball League & USA Softball!***