

# USA Swimming: Member Data Validation Service Overview

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## AUTHORIZE TEAM UNIFY AS THE VENDOR FOR YOUR TEAM

SwimOffice allows you to use USA Swimming's Member Data Validation Service to verify member information and submit your registration batch(s) directly to the LSC/USA Swimming without emailing a file. If your team has never done this, you will first need to authorize TeamUnify as a third-party vendor with SWIMS. This is a one-time procedure.

Once that is complete, it is a two-step process every time thereafter.

1. Compare member data with SWIMS database—This allows you to correct any discrepancies or errors before registering them.
2. Register your swimmers with USA Swimming—This uses a file-less batch registration to send the data directly to USAS.

After submitting the batch, SwimOffice automatically checks with USAS once a day as to its status. Assuming it was successful, it will update the *LastReg Conf'd* field with the process date for each member submitted, and the USA Swimming badge for registered athletes will be set to the year you selected in which to register them. You can also check the status on your own.

For security purposes, the person performing either procedure must be a valid **non-athlete member** of USA Swimming and know the club portal password for the club (you can get this from the Ohio Swimming Office if you don't have it). **You will not be able to login for this with an account where you are registered as an athlete with USAS.** Make sure that you have a user account on the USA Swimming website and that your account is linked to your USA Swimming membership record.

1. Chameleon users: In the side menu click **Team Admin > Account/Member Admin > USA Swimming Registration** tab.
2. New CMS users: In the side menu click **Team Tools > USA Swimming Registration**.
3. Click **USA SWIMS Integration > Check Reg Status**.
4. If the *Check Registration Status* dialog appears, you have already authorized TeamUnify as a vendor. Click **Finish** to dismiss it and skip to the next process, Compare Member data.
5. When you have not yet authorized TeamUnify as a vendor, the below dialog will appear.

Compare Member Information ✖

TeamUnify is proud to announce that you can now connect to USA Swimming directly!

You can now submit your USAS Member Registration Batches filelessly, while catching common registration errors and automatically letting you know if transfer paperwork is required!

This new system also allows you to compare your member information against USA Swimming's SWIMS database, allowing you to compare and keep your member information accurate and up to date.

To begin you'll need to log into your team's USAS account and authorize TeamUnify as the vendor for your team:

[Open USA Swimming Registration Page](#)

Enter the provided vendor code below.

**Vendor Code:**

[Next ➞](#)

6. Click **Open USA Swimming Registration Page**.
7. It will open the MDVS Vendor Activation page in a new browser tab.
8. Follow their instructions to activate TeamUnify as a third-party vendor. (Please note: The 'Club Administrator Password' is case-sensitive. This password will be alpha-numeric with capitalized letters.)
9. Once you do this, it will list an *ACTIVATION CODE*. Copy or note this code.

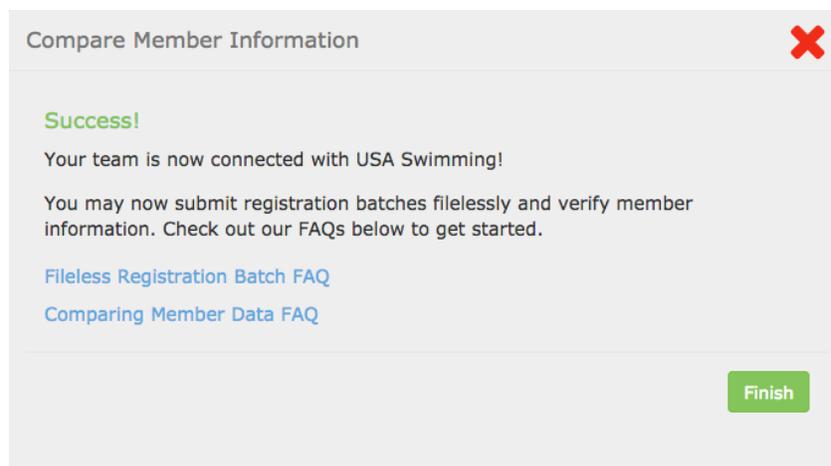
### APPROVED VENDORS FOR COLORADO SPRINGS RACQUET CLUB



VENDOR	CURRENT STATUS	AUTHORIZED BY	ACTIVATION CODE
VENDOR 1	PENDING	gilliamcolorado	B59A2B40

Vendors with a status of "PENDING" are waiting for the completion of the connection which must be done from the vendor's software. Please log onto their system and complete the activation.

10. Switch back to your SwimOffice website and paste or enter the Activation Code in the *Vendor Code* field and click **Next**.
11. If the process was successful, you will see the following dialog. Click **Finish**.



12. If the *Check Registration Status* dialog appears, click **Finish** to dismiss it.
13. Back on the USA Swimming site, the *CURRENT STATUS* will change from PENDING to ACTIVE.
14. You are now ready for the next process; see the first article below.

## STEP 1: COMPARE MEMBER DATA

SwimOffice lets you directly connect with USA Swimming's SWIMS database to verify member information and submit registrations. The information below covers the most important step so that you can choose which data is accurate—yours or USA Swimming's—and make the data match in both.

1. Chameleon users: In the side menu click **Team Admin > Account/Member Admin > USA Swimming Registration** tab.
2. New CMS users: In the side menu click **Team Tools > USA Swimming Registration**.
3. To see athletes who need to be verified,
  - a. Click **Customize Columns**.
  - b. In the left column, click **USAS Connected**, then drag and drop that column that's on the right to where you want it.
  - c. Click **Done**.
4. To filter which athletes you select,
  - a. Click **Customize Filters**.
  - b. In the left column, click **USAS Connected**.
  - c. Click **Not Connected** on the right.
  - d. Click **Done**.
5. Select one, many, or all athletes with the checkboxes.
6. Click **USA SWIMS Integration > Compare Member Information**.

The screenshot shows a software interface with a top navigation bar containing buttons for 'Edit', 'Communicate', 'Export', and 'USAS SWIMS Integration'. A dropdown menu is open under 'USAS SWIMS Integration', with 'Compare Member Information' highlighted in a green box. Other options in the menu are 'Submit Reg Package' and 'Check Reg Status'. Below the menu is a table with columns: 'Last Name', 'First Name', 'USAS Connected', 'ID Card', 'LastReg Gen'd', and 'LastR Conf'. Two rows are visible: one for 'Agstrom, Bill' and one for 'Anderson, Serge'. Both rows have a checked checkbox in the 'Last Name' column and 'Registration Required' in the 'USAS Connected' column.

7. If you see a dialog with a *Vendor Code* field at the bottom, you will need to first to log into your team USAS account and authorize TeamUnify as the vendor for your team (See page 1 of this document). If the process was successful, click **USA SWIMS Integration > Compare Member Information** again.
8. You will see a list of your selected athletes. Click **Verify Member Information**.

Compare Member Information				
Verify Member Information				
Last Name	First Name	ID Card	USAS Connected	Reg. Status
Anderson	Carolyn		Not Connected	New
Baker	Steven	090501STEIBAKE	Not Connected	Renew
Baker	Kathryn	070205KAT*BAKE	Not Connected	New

9. Note: In the following screens, if you click the red **X** it will abort the process and you will need to start over, which, in some cases, you will need to do to make corrections. Otherwise, if you have a small screen you may need to scroll down to see the **Next** or **Finish** button.
10. If any athletes are missing data, they will be listed. For missing IDs, you can check the box by their name and click **Build ID For Selected Members** to fix it. As of this writing, you can generally ignore all the others if it doesn't specify what data is missing (this will be fixed in a future release).

### Compare Member Information

#### Missing Data

The following athletes are missing data.

	Last Name	First Name	ID Card	Date of birth
<input checked="" type="checkbox"/>	Anderson	Carolyn		2007-04-05
<input type="checkbox"/>	Baker	Steven	090501STEIBAKE	2001-09-05

- a. From here, you can either click **Cancel** to abort the process and fix any other missing data or click **Next** to go on anyway.

11. Then you may see a list of those athletes whose data is missing from or does match that in SWIMS for the reasons listed on the screen. If you know they've previously been registered, it's likely because their name or ID doesn't exactly match in both systems. Click **Next**.

### Compare Member Information ✕

Processing complete Export

160 Member's data did not match USA Swimming's records. This is because the member information did not match, the member is not registered or there are multiple matches within the USA Swimming database.

Because of this you will be unable to verify and compare them against USA Swimming's data.

This will be resolved when submitting the member for the next USA Registration. ? Need Help?

Last Name	First Name	ID Card	USAS Connected	Reg. Status
Cook	Raktim	100106RAKTCOOK	Registration Required	New
Carpenter	Julia	081310JULLCARP	Registration Required	New

12. After this, athletes without any issues are listed, if any. Click **Next**.
13. Then you will see athletes whose data does not match USAS's but for which you can make a choice.

### Compare Member Information ✕

Processing complete Export

1 Member's data did not match USA Swimming's record. You can either accept the information passed by USA Swimming, or keep your version and update USA Swimming during the next registration.

Keep Current Version
Accept USAS Version

	Member Name	Team Information	USAS Information
<input checked="" type="checkbox"/>	* Steven Atwater	<input checked="" type="checkbox"/> Preferred Name: <input type="checkbox"/> Address: 2387 NW Cheno Blvd <input checked="" type="checkbox"/> Ethnicity Code #1: S	Preferred Name: Steve Address: <span style="color: red;">Hidden</span> Ethnicity Code #1:

\* USA Swimming has determined that this member is not currently associated with your team and is not displaying Address and Phone information currently in the SWIMS database until the swimmer is officially registered with your team. It is suggested you use the information in the TeamUnify database in this scenario. Finish

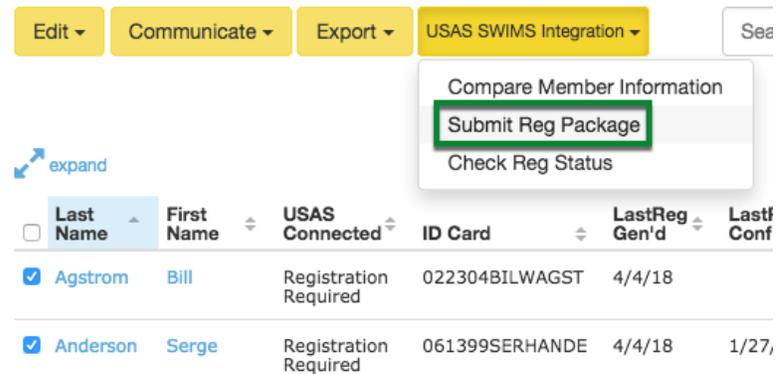
- a. See Appendix 1 at the end of this document for best practices on handling discrepancies.
- b. Select those and their fields whose data you want to override USAS's data and click **Keep Current Version**. Those rows will turn green.
- c. Next select the opposite list of fields and click **Accept USAS Version**. Those rows will turn blue and the member's data will be updated with the USAS information.

14. Click **Finish**.

## STEP 2: REGISTER SWIMMERS WITH USA SWIMMING

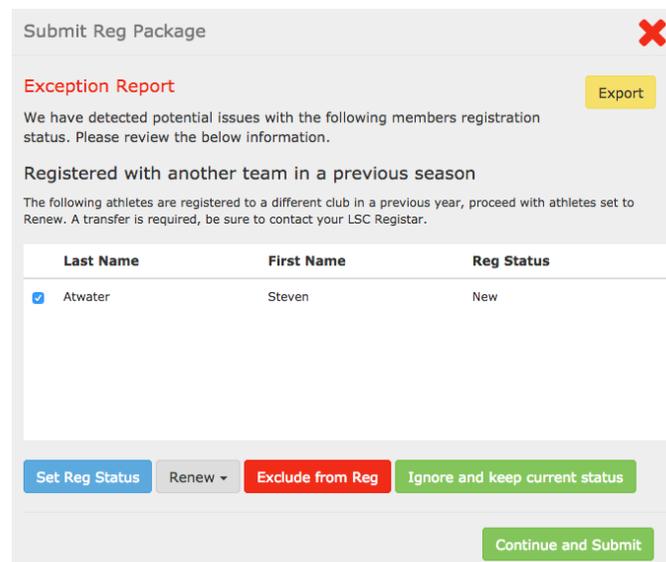
**IMPORTANT:** You must Compare Member Information *before* submitting your registration (See Step 1 in this article).

1. Chameleon users: In the side menu click **Team Admin > Account/Member Admin > USA Swimming Registration** tab.
2. New CMS users: In the side menu click **Team Tools > USA Swimming Registration**.
3. Set any filters you need with **Customize Filters**.
4. Select one, many, or all athletes with the checkboxes whom you want to register.
5. Click **USA SWIMS Integration > Submit Reg Package**.



The screenshot shows a user interface with several yellow buttons: 'Edit', 'Communicate', 'Export', and 'USA SWIMS Integration'. The 'USA SWIMS Integration' dropdown menu is open, showing three options: 'Compare Member Information', 'Submit Reg Package' (highlighted with a green box), and 'Check Reg Status'. Below the buttons is a table with columns: 'Last Name', 'First Name', 'USAS Connected', 'ID Card', 'LastReg Gen'd', and 'Lastf Conf'. Two rows are visible, both with checkboxes checked. The first row is for 'Agstrom, Bill' with 'Registration Required' status and ID '022304BILWAGST'. The second row is for 'Anderson, Serge' with 'Registration Required' status and ID '061399SERHANDE'.

6. Select your registration year and click **Submit to LSC**.
7. If you see a dialog with a *Vendor Code* field at the bottom, you will need to first to log into your team USAS account and authorize TeamUnify as the vendor for your team. If the process was successful, click **USA SWIMS Integration > Submit Reg Package** again.
8. If any athletes have non-valid data, such as a blank ID or *Reg Status* of **Not Set**, you will need to correct them and then make your selections and submit again.
9. Note: In the following screens, if you have a small screen you may need to scroll down to see **Next**, **Finish**, or a similar button. If you click the red **X** it will abort the process and you will need to start over.
10. Any athletes with issues will be listed in an Exception Report. **You will need to select the appropriate action for every athlete listed before continuing.** You may need to scroll down if there are multiple issues, such as already being registered for the selected year.



The screenshot shows a dialog box titled 'Submit Reg Package' with a red 'X' in the top right corner. It contains an 'Exception Report' section with a yellow 'Export' button. The text reads: 'We have detected potential issues with the following members registration status. Please review the below information.' Below this, it says 'Registered with another team in a previous season' and 'The following athletes are registered to a different club in a previous year, proceed with athletes set to Renew. A transfer is required, be sure to contact your LSC Registrar.' A table lists one athlete: 'Atwater, Steven' with a 'New' registration status. At the bottom, there are buttons for 'Set Reg Status', 'Renew', 'Exclude from Reg', 'Ignore and keep current status', and a large green 'Continue and Submit' button.

- a. To change someone's registration status, check the box by their name, set the Reg Status dropdown to what it should be and click **Set Reg Status**. Their row will turn blue.
- b. For others, select them and either click **Exclude from Reg Batch** (which will turn their row red) or **Ignore and Keep Current Status** (which will turn their row green).
- c. **TRANSFERS**: When you get the exceptions screen, select the checkbox next to their name and set the reg status to NEW (since they are new to your team). Then Select the green button (**Ignore and keep current status**) to include the athletes in the batch sent over to USA Swimming. Then **Continue and Submit**. Be sure to notify the families to fill out the online transfer form. These registrations will be held in the USA Swimming holding tank until the transfer request has been received. Athletes will swim in meets unattached until the transfer request has been received.

11. Click **Continue and Submit**.

12. The system will generate an SDIF file and submit it to USA Swimming. You will either see a success message or error message if there were any problems.

Submit Reg Package

**Success!**  
Your Registration Package has been sent!  
Your registration batch has been sent and is currently pending approval. Check the Registration Status option to monitor your registration batches.

Registration Status	Member Count	Registration Fee	LSC Fee	Count* (Reg. Fee + LSC Fee)
Change - Year-round	16	0	0	0
New - Year-round	146	60	10	10220
<b>Total</b>	<b>162</b>			<b>10220</b>

[Print Cost Table](#)

**Next**

13. Once the Ohio Swimming Office processes the batch, your team account will be invoiced for payment. You can enter the fees in the above screen to help determine how much you will owe. Click **Next** when finished.

14. After a successful submission, you will see any transfer members. Export those exceptions for your records and notify those families they will need to submit the online transfer form. Click **Finish**.

Submit Reg Package ✘

**Transfer Members** Export

The following members are listed as being last registered to another team or LSC, please contact your LSC Registrar for the appropriate transfer paper work.

Last Name	First Name	ID Card	LastReg Gen'd	Reg. Status
Atwater	Steven	081204STEFATWA	Not Connected	New

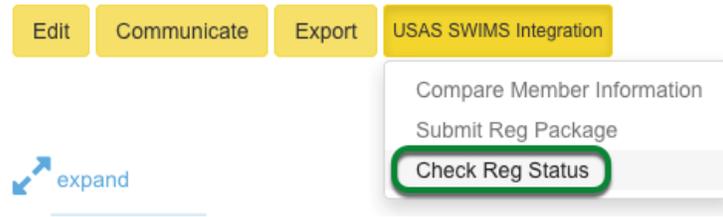
**Finish**

15. SwimOffice automatically checks once a day as to its status of membership processing. Assuming it was successful, it will update the *LastReg Conf'd* field with the process date for each member submitted, and the

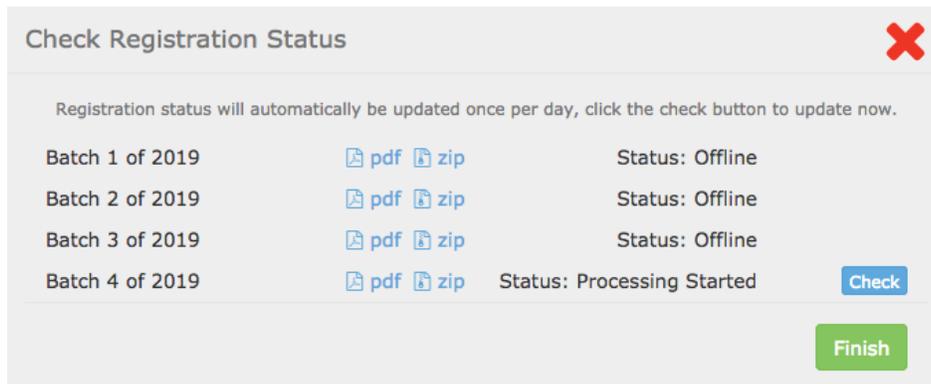
USA Swimming badge for registered athletes will be set to the year you selected to register them. To check the status:

- a. Chameleon users: In the side menu click **Team Admin > Account/Member Admin > USA Swimming Registration** tab.
- b. New CMS users: In the side menu click **Team Tools > USA Swimming Registration**.

16. Click **USA SWIMS Integration > Check Reg Status**.



17. Scroll to the bottom, if needed, and then click **Check** by any submitted batch. The status will change to *Complete* when finished.



18. Click **Finish**. You will need to refresh the screen to see the *LastReg Conf'd* column update.

## APPENDIX 1: BEST PRACTICES FOR MEMBER COMPARE DISCREPANCIES

### Best practice for swimmer(s) not found in the USA Swimming database

- Member not found in the USA Swimming SWIMS database, but you know they have been previously registered.  
**Most common reason:** Their First Name, Last Name, and/or ID Number are not a 100% match with their information in TeamUnify. Example: Last Name in TeamUnify is Smith Jr. and in SWIMS it is Smith.  
**Recommendation:** Please consult your athlete roster in your USA Swimming Club Portal to determine the proper information that should be in the TeamUnify database.

### Best practices for mismatches

- **First Name, Last Name, Preferred Name**  
**Most common reason:** The upper/lowercase of the letters do not match.  
**Recommendation:** Use your best judgment.  
**Note:** If, after submitting the registration batch, you do the member compare again and the same mismatch appears you will need to submit a change to the LSC.
- **Middle Name**  
**Most common reasons:** No Middle Name vs Middle Name, Middle Initial vs Middle Name, sam vs Sam  
**Recommendation:** Accept the USAS information.  
**Reason:** This swimmer has been registered before and what the USA Swimming database has is what they were previously registered with.
- **ID Numbers**  
**Most common reason:** You previously either took the Compare Member Information step and/or submitted a Registration Batch with the ID Number that USA Swimming now has.  
**Recommendation:** Verify that the USA Swimming ID number is the proper ID by going to your USA Swimming Club portal. If this is correct, select it and click **Accept USAS Version**. If results are associated with the old/wrong ID you can use the Merge ID function in the Member Profile to merge the results to the proper ID.  
If the ID number in the TU system is correct and the swimmer is already registered for the current year please submit a change.
- **Address**  
**Most common reasons:** Drive vs Dr or Street vs St, Uppercase letter vs lowercase, A “.” at the end of Dr. vs Dr, Apt # in the Address 1 Line vs Address 2 Line, northridge vs. Northridge, 01473-2014 vs 01473  
**Recommendation:** Accept the USAS information.  
**Reason:** The USA Swimming database uses a software to validate addresses and formats them in a certain way. If you do not accept the USAS information you will always get these mismatches when using the Compare Member Information tool.
- **Phone Numbers**  
**Most common reason:** Formatting: 888-555-1212 vs 8885551212  
**Recommendation:** Leave alone.  
**Reason:** In a future release we will update the logic to not look at the formatting and these will not appear as mismatches.
- **US Citizen, FINA, Ethnicity, Disability**  
**Most common reasons:** This information has not been submitted in the past to USA Swimming. It is a transfer swimmer that was registered with USA Swimming with this information previously, but it has not been selected yet in the TU database.  
**Recommendation:** Use your best judgment.  
**Note:** If, after submitting the registration batch, you do the member compare again and the same mismatch appears you will need to submit a Change to the LSC.