

Action	Details
<b>Merge Two Accounts</b>	<p><b>We need:</b> The primary email addresses of both accounts, who the adult/parent is, and which email they want to be the primary (login) after the merge.</p> <p><b>Things to consider:</b></p> <ul style="list-style-type: none"> <li>• When there are two different parties involved in the merge, say mom and dad, it's important that both parties know and agree to have their accounts combined. Be mindful of divorced or split families.</li> <li>• Is anyone a staff/coach and needing a background screen? There can only be one member per account who can take a background screen, and they must be the adult/self-profile.</li> </ul>
<b>Merge Two Profiles within the Same Household</b>	<p><b>We need:</b></p> <ul style="list-style-type: none"> <li>• Links/URLs to both profiles in the directory.</li> <li>• Confirmation of their name and DOB.</li> </ul>
<b>Move a Sub-Profile from One Account to Another (Must be done with caution)</b>	<p><b>We need:</b></p> <ul style="list-style-type: none"> <li>• The account the profile is being moved to must be created first prior to the request.</li> <li>• The email address the profile CURRENTLY exists under and the email of the account we are MOVING the profile to.</li> <li>• If the moving profile is an adult (18+): Do they need to be on their own account <b>-OR-</b> is the profile a child being moved from one parent to another, and are both parents aware and in agreement to the move?</li> </ul>
<b>Move Memberships</b>	<p><b>We need:</b></p> <ul style="list-style-type: none"> <li>• The URL/Link to BOTH profiles (the one the membership is currently on and the one the membership needs to go to) and very clear details of which is which.</li> <li>• Which membership(s) need to be moved (if multiple exist).</li> <li>• Confirmation of the receiving profile's, Name, DOB, &amp; Gender to ensure the verified data is correct.</li> </ul> <p><b>Things to consider:</b></p> <ul style="list-style-type: none"> <li>• Does this person have any credentials or items that they will have to re-take if we move their membership?</li> <li>• The member's current Member ID: We can either move the member ID or give them a new ID once moved.</li> </ul>
<b>Move Background Screen</b>	<p>In limited scenarios, we can <a href="#">move a background screening</a> from one profile to another. Examples include:</p> <ul style="list-style-type: none"> <li>• An 18-year-old's profile is under their parent's account and <b>they</b> completed their background screen under their parent's profile rather than creating their own account.</li> <li>• When we move a membership, we can also move the background screen to the new profile depending upon who's information was submitted for screening.</li> </ul>
<b>Accept a Club Assignment for a Parent</b>	<p><b>What we need:</b></p> <ul style="list-style-type: none"> <li>• The member must already have purchased the necessary membership or had it gifted to them.</li> <li>• The member must already have an account created and claimed their profile.</li> <li>• The correct club assignment should already have been sent by either the region or the club.</li> </ul> <p style="text-align: right;"><i>*Should only be used in urgent scenarios.</i></p>
<b>Clear a Club Assignment</b>	<p><b>What we need:</b></p> <ul style="list-style-type: none"> <li>• Link/URL to the profile or clear identifying information.</li> <li>• Details on the membership type and club name that we need to clear the club assignment for.</li> </ul>
<b>Claim a Profile if the User has Already Created an SE Account.</b>	<ul style="list-style-type: none"> <li>• If the email address being invited to claim already created an account, we can login and accept that invite.</li> <li>• If an account does not exist, we cannot claim the profile.</li> </ul>

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<b>Change an Adult/Self/Me Profile to a Sub-Profile</b>	<ul style="list-style-type: none"> <li>• Instead, have the adult create a new account in their own name under a different email. We can then merge the old account into the new, making the old profile a sub-profile of the new account.</li> </ul>
<b>Grant Permissions</b>	<p>This is a longstanding policy SportsEngine support adheres to and will continue to adhere to. We will not <a href="#">grant permissions</a> to users, and there are very few exceptions.</p> <ul style="list-style-type: none"> <li>• If the club is paying for SE Premium, we will NEVER grant permissions, EVER, as this club could have financial and private material.</li> <li>• If the club's HQ already has someone with the correct permissions to grant others permissions, all resources must be exhausted prior to our assistance.</li> </ul>
<b>Sanction/Provision a Club's HQ (i.e. give them the USAV tab)</b>	<p><b>We need to:</b></p> <ul style="list-style-type: none"> <li>• Check to see if duplicate HQs exist.</li> <li>• Review list of active clubs provided to SE before launch.</li> <li>• Review the region sanctioning/application to see if the club has completed the registration.</li> </ul> <p>If the club is found in any of the three steps above, we (SE Support) can submit a request to our professional services team to get the sanctioned club setup/provisioned correctly. As another group must complete this task, support is not in control of the timeline.</p> <p>If we cannot confirm the club's sanctioning status through the three ways above, we'll ask that the club complete the region sanctioning/application registration. Once the application is submitted and the region has changed its entry to APPROVED, the information is sent automatically to professional services.</p>
<b>Move Credentials</b>	<ul style="list-style-type: none"> <li>• Any historical credentials can be added to a profile using the credential lookup (RTM: Real-Time Migration).</li> <li>• The Region or USAV can do an IMPORT of SafeSport certifications.</li> <li>• We can move a background screen that was taken through SE.</li> </ul> <p><b>Things to consider:</b></p> <ul style="list-style-type: none"> <li>• We cannot move any USAV Academy credentials taken post 9/1/2020 at this time.</li> <li>• We cannot remove credentials (except background screen) without developer intervention which may not happen immediately.</li> </ul>
<b>Create a SportsEngine Account</b>	<p>We cannot <a href="#">create a SportsEngine account</a> on behalf of a member as they need to confirm their email address and create a password.</p>
<b>Delete Profiles that have ANY History</b>	<p>Profiles with any of the following data cannot be "deleted" but can be merged into other existing profiles.</p> <ul style="list-style-type: none"> <li>• Has been claimed (meaning they have the check-mark in the profile status column)</li> <li>• Any financial history (SE registration, SE invoice. Membership purchase, etc.)</li> <li>• Have ever been rostered either in the Governing season OR through SE Premium website team pages.</li> </ul>
<b>Update Eligibility Requirements</b>	<p>Any override of an eligibility requirement should be completed by a region or USAV admin, depending on the specific requirement.</p> <ul style="list-style-type: none"> <li>• SafeSport certifications can be imported if the member has their certificate with completion code.</li> <li>• Regions can do an override of any REGION specific waivers. Only USAV administrators can override the USAV Waivers.</li> </ul>
<b>Change Member IDs</b>	<p>Old Member IDs can be migrated through the credential lookup flow (RTM: Real-Time Migration). Otherwise, we cannot edit a person's Member ID.</p>
<b>Cancel Memberships and/or Issue Refunds</b>	<p>The region must cancel and refund any region memberships and USAV must cancel and refund any USAV memberships.</p>