

# Memberships and Eligibility FAQ's

## WHY SHOULD AN ORGANIZATION USE MEMBERSHIPS?

Memberships provide a variety of benefits for an organization:

- Using the memberships and eligibility functionality, organizations can create a safety program that will allow them to create, monitor, and manage safety requirements for staff such as background screening, waivers, and APS training.
- Memberships also allow an organization to strengthen its sponsorship program, giving a simple way to offer discounted services and goods from participating sponsors.
- Optimize an organization's ability to run a booster club. Offering different options for donation can provide tiers of incentives.
- Simplify the tryout process to manage and run tryouts easily.

Additional membership features include digital and printed "Memberships Cards" with QR codes for easily communicated real-time eligibility updates and eligibility emails.

## WHY AM I BEING ASKED TO UPDATE MY FINANCIAL SETTINGS IN ORDER TO CHARGE FOR A MEMBERSHIP?

The membership process requires updated financial settings for the membership purchase flow.

## WHERE CAN I SEE IF I HAVE UPDATED MY FINANCIAL SETTINGS?

To view financial settings:

1. Sign in to "SportsEngine HQ"
2. In the left-hand navigation, click **Settings > Financial Settings**.
3. During the membership creation process, next to *Fee*, if there is a message prompting the user to add or update settings, this indicates that financial settings are not configured for your organization.

## CAN I EDIT THE NAME OF THE MEMBERSHIP?

If the membership has not been purchased yet, the "Name" and *Eligibility Details* can be edited. Once the membership has been purchased it can no longer be edited.

**NOTE:** The "Membership Description" can be edited at all times.

## WHY DO I SEE TWO MEMBERSHIP SECTIONS WITHIN SPORTSENGINE HQ?

If you are a part of an affiliated organization, you may have access to memberships as a result of that partnership. As a premium client, you will now also have access to create and manage your own memberships. This will cause there to be two

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membership sections within SportsEngine HQ.

## **DO I NEED TO HAVE FINANCIAL SETTINGS TO SET UP USER MEMBERSHIPS?**

You do not need to have *Financial Settings* set up to set up memberships. But, if you plan on applying a fee to the membership, your organization will need to set up the *Financial Settings*.

## **DO I HAVE TO SET A PRICE ON MY MEMBERSHIP?**

Memberships do not require a fee to be created and applied. If you wish to apply a price to the membership, you must have *Financial Settings* set up.

## **I CREATED MY MEMBERSHIP AND WANT A WAIVER ADDED, BUT I DON'T SEE ANY WAIVER OPTIONS AVAILABLE?**

In order to add a waiver to your membership, it must have been created before the membership is created. To create a waiver follow the steps outlined [HERE](#).

## **WHAT ARE MEMBERSHIP REQUESTS?**

A membership request is created when an individual tries to purchase a membership with a club when they already have a previous membership with a different club.