sportsengine hq



USA Softball Guide

USA SOFTBALL ®

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Introduction

Welcome to SportsEngine HQ! There are some new concepts to go along with a new system. This guide is designed to walk your Club or League through using your SportsEngine HQ Account with Season Management.

SportsEngine HQ is an easy-to-use feature that houses all of your organization's administrative tools needed for the upcoming season, including:

- Memberships
  - Eligibility
- Season Management
  - Team Creation
  - Roster Submission

To learn more about all of the other tools SportsEngine has to offer, check out the Help Center, or click the **Need Help?** button to select the Academy tab for a series of training modules.

NEW CONCEPTS/TOOLS

- **SportsEngine HQ** - The administrative area where admins have access to all of SportsEngine HQ's tools and functions.
- **Member Directory** - Product within SportsEngine HQ that houses and compartmentalizes organizational member data.
- **Memberships** - Links a player/staff to USA Softball, and ensures that they're playing within the rules.
- **Eligibility** - Requirements that need to be completed once a member purchases a membership. Eligibility requirements vary depending on membership level.
- **Roles** - Permissions that are given to SportsEngine HQ accounts that allow for club admins to perform administrative tasks within SportsEngine HQ.
- **Season Management -** A one stop shop to managing and sharing the entire season.
- **Connected Season** - Makes the connection between your Club's and USA Softball League's Season.
- **Shared Divisions** - Divisions that teams are assigned to depending on specific division rules. These divisions are selected upon sharing the roster.
- **Division Rules** -Established rules that segment shared divisions. Rules include: age, gender, team fee payment, membership level, roster sizes, etc.

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- **Affiliation Status** - Alerts you when a team needs attention so that you can act/print rosters.
- **Digital Cards** - A scannable digital player or staff card that allows for quick membership validation.

SportsEngine HQ

HOW TO ACCESS SPORTSENGINE HQ

1. Go to sportsengine.com.
2. In the top right-hand corner of the screen, click **Sign In.**
3. Enter your email address **> Next.**
4. Enter your password **> Sign In.**
   - If you have forgotten your password, click **Forgot** to reset.
5. Once logged in, click **My Organizations** on the SE Bar.
6. Click the "name" of your Club.
   - You are redirected to your Club's SportsEngine HQ site.

Members

The Members tab is a free SportsEngine HQ feature. Members features the following:

- **Directory:** Where player and staff information is kept.
- **Memberships:** The area where you view/send membership invites and view eligibility.
- **Electronic Documents:** Are where waivers, consent forms, agreements, etc. can be added and edited as eligibility requirements.

DIRECTORY

The Member Directory is home to your organization's Members. Members are added into the directory through manual entry, import, or by sharing a public club assignment (see Memberships for more information.) Here is where you will search for and communicate with members, assign roles, and create groups for reporting. It is also where player and staff profile information is kept.

HOW TO MANUALLY ADD MEMBERS

1. Sign in to "SportsEngine HQ."
2. Once in "SportsEngine HQ" click on the **Members** tab then choose **Directory**.
3. In the top-right corner of the screen, click **Add Person**.
4. Input the member's Name and Email Address plus any optional fields. It is imperative that you use the correct email address.
5. Click **Add**.

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6. To add multiple members, check the box next to **Add Another**.
7. The member you added will receive an email asking them to accept your invitation.

HOW TO IMPORT MEMBERS

1. Sign in to your account and go to "SportsEngine HQ."
2. On the left-hand navigation, click **Members > Directory**.
3. On the top-right side of the screen, click the **3 dots**, and select **Import**.
4. On the *Upload a File* screen, first click on the option to **Download the Template**.
5. Open the upload template CSV.
6. Input your new roster and team information into the CSV file. The following fields are mandatory:
   - First Name
   - Last Name
   - Email
     - **NOTE:** Please use the correct email address for either the staff member. Failure to do so will result in technical consequences that lead to member duplicates or merging complications.
   - Date of Birth (DOB)
   - Gender
   - Address
   - City
   - State
     Zip Code
   - Phone number
7. On the *Upload a File* screen, click **Add File** to add and open your CSV template or click, drag, and drop the file into that area.
8. Click **Next**.
9. The next screen will match your import columns. Green means you are good to go, while red means you will need to make some edits.
10. Click **Next**.
11. The *Review* page will show you your summary. Click **Import** if everything looks good to go.
12. Members will receive an email invite that they must accept in order to become an active member in the directory.
    - **NOTE:** This is a separate invite than a membership email.

HOW TO SEARCH/VIEW MEMBERS

1. Sign in and go to "SportsEngine HQ."
2. From the left navigation menu, click on **Members > Directory.**
   - Use the search bar to find specific members by inputting their name or email .
3. Under the *Name* column, click on the "name" of the member.
4. Scroll down to view contact information or click the sub tabs to see memberships, roster history, and more.

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HOW TO MESSAGE INDIVIDUAL MEMBERS

1. Sign in and go to "SportsEngine HQ."
2. From the left navigation menu, click on **Members > Directory.**
3. Under the *People* sub tab, search for the member you'd like to message by their name or their email address.
4. Select the member(s) you'd like to email.
5. In the top right corner, click **Message.**
6. Input your message and click **Send.**

HOW TO CREATE A GROUP

1. Sign in and go to "SportsEngine HQ."
2. From the left navigation menu, click on **Members > Directory.**
3. Under *Directory*, choose the **Groups and Rosters** sub tab.
4. In the top-right corner, click **Add Group**.
5. Input the "Group Name," select the "Privacy Setting" and click **Add**.
6. On the right side, click on the **three dots**.
7. Choose **Add Group Members**.
8. Type in the "names" of the members you want to add to the group and click **Add.**

HOW TO CREATE A SMART GROUP

1. Sign in and go to "SportsEngine HQ."
2. From the left navigation menu, click on **Members > Directory.**
3. Choose the blue Filter button.
4. Filter by a Registration, SportsEngine HQ profiles, or a Team Roster.
5. Choose your data or source, then finish your filter selections. In the top-right corner, click **Message.**
6. Click Done.
7. A finalized list of your members will appear.
8. Click Add Smart Group.
9. Name the group and click Add.

HOW TO MESSAGE A GROUP

1. Sign in and go to "SportsEngine HQ."
2. From the left navigation menu, click on **Members > Directory.**
3. Click the **Groups and Rosters** sub tab.
4. Click the "name" of the group you want to message.
5. In the top-right corner, click **Message.**
6. Input your message and click **Send.**

HOW TO ASSIGN ROLES TO MEMBERS

"Roles" are named permission sets that can be assigned to staff members within your organization.

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To assign roles:

1. Sign in and go to "SportsEngine HQ."
2. From the left navigation menu, click on **Members > Directory.**
3. Search for the person that you want to assign a role to and click into their profile.
4. Choose the **Roles** sub tab.
5. Click the **+** ---OR--- choose **Assign Role.**
6. A new modal screen will appear.
7. Click the drop down by *Select Role*.
8. Choose a role. Users are able to have multiple roles (example: Org Admin.)
   - **Organization Admin**: Can access your club's SportsEngine HQ features (Directory, Registration, etc.) but cannot access shared data.
9. Click **Save**.

Role Functions:

Functions	Organization Admin	USAS Manager	USAS Viewer
Input teams, players, and staff into the Governing Season		√	
Print official rosters & member cards		√	√
View teams, players, and staff within Governing Season		√	√
View player/staff information in Member Directory	√		
Cancel memberships		√	
Certify eligibility requirements are complete		√	

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Memberships

Memberships allow USA Softball to ensure eligibility requirements are being met while also allowing them to utilize the member directory.

Eligibility requirements can include:

- Background Screens, Waivers
- SafeSport, ACE Training, Umpire Exams

BACKGROUND SCREEN PROCESS

Coach & Staff paying for their own Background Screen can be completed via:

- Email from Membership Selection
- MySportsEngine

Organizations paying for Coach & Staff Background Screen must buy codes from USA Softball. Codes must then be distributed to Coaches & Staff. Background Screens can then be completed via:

- Email from Membership Selection
- MySportsEngine

There are four ways for a membership to be selected:

- **Public Club Assignment** - Generate an open link you can share to add members to your club. Upon purchase, new members will be added to your directory.
- **Direct Club Assignment** - Send, view, remind, or revoke club assignments. Direct assignments are private invites for specific members currently in your directory.
- **On behalf of a member** - This membership is selected by an admin through the Member Directory.
- **Share Team Memberships Path** - You are directed to select player membership as a part of the rostering process in cases where a State/Metro set up only one membership acceptable per the divisions submitting.

PUBLIC REQUESTS AND STAFF MEMBERSHIPS

SENDING A PUBLIC CLUB ASSIGNMENT

This path is recommended. After sharing the link with your staff participants, members are guided to select the correct membership. Following this path, your staff participants are automatically accepted to your club, appear in the directory and can now be rostered to teams.

1. From the left-hand navigation menu, click **Members** > **Memberships**.
2. Below the *Public Club Assignment* heading, click **Generate an open link**.
   - A link is generated that can be copied and shared to participants either through email or website.

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- The system determines the appropriate membership based on their profile and the data provided.

DIRECT CLUB ASSIGNMENT

Send, view, remind, or revoke club assignments. Direct assignments are private invites for specific members currently in your directory. After a member is added to the directory, this path sends the member an invite from the Club to purchase a Membership.

1. From the left-hand navigation menu click **Members** > **Memberships**.
2. On the Memberships page below the *Direct Club Assignment* header, click **Send, view, remind, or revoke club assignments.**
3. In the upper-right corner, click **Send**.
4. Add people to receive the club assignment.
5. Enter a subject and custom message (optional) to be sent with the club assignment.
6. Click **Send**.

SELECT MEMBERSHIPS ON BEHALF OF MEMBERS FROM THE DIRECTORY

This path allows an admin to select memberships for members that exist in the directory. Upon selecting, members are emailed their memberships and may begin to complete their eligibility.

1. Sign in and go to "SportsEngine HQ."
2. Click **Members > Directory**.
3. Search or use the filters to find the members to select a membership for.
4. In the upper-right corner, click the **three dots** icon.
5. Click **Buy Memberships**.
6. Choose the membership you'd like to select.
7. Enter the date the membership is valid.
8. Click **Review Order**.
9. If needed, add any missing information and click **Continue**.
10. Follow the steps to complete payment. Click **Continue**.
11. Once memberships are selected, a receipt is emailed and the members are emailed their memberships and can begin to complete any eligibility requirements.

Create & Share the Season

CREATE AND CONNECT THE SEASON

1. From HQ, click **Competition > Season Management**.
2. Click **Add Season**.
3. Enter the "Season Name," "Sport," "Start Date," and "End Date."

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4. Click **Add Season**.
5. From the *Overview* tab, click **Connect** to connect your season with USA Softball.
   - If the USA Softball season is not yet active, you will not be able to connect. You may still proceed with creating your season and complete the share process later.
6. Choose the "USA Softball League" and the "Season" you want to connect with.
7. Click **Save**.

CREATE DIVISIONS AND TEAMS

1. Create **Divisions**
2. Click the **Divisions** tab.
3. Click **Add Divisions**. Enter the "Division Names" for each.
4. Click **Add Divisions** when completed.
5. Within the season, click the **Teams** tab to begin creating teams.
6. To the right of the team search, click the three vertical dots. You'll be able to either **Add Teams** or **Import Teams**.

Add Teams Manually

1. Choose the **Add Teams** option.
2. Enter the "team name" and choose the "division."
3. Repeat step 2 until all teams have been created.
4. Click **Create**.

Import Teams/Rosters

Importing teams is helpful if your members are not yet in your directory or if your teams/rosters have already been created in a spreadsheet or using a third-party system. It is recommended to stay within a max number of 100 per import.

Fill out this template before completing this step. Need help completing the template? Click here.

NOTE: Address is required for Memberships. If not provided initially, Admins must provide this for each member who is imported without this information.

Imported members will be sent an invitation to join your organization.

1. Choose the **Import Teams** option.
2. Click **Add File** or drag and drop the file to upload it.
3. Add a file by selecting it from where it is saved on your computer and click **Open**.
4. Click **Next**.
5. Once the file is uploaded, ensure that the columns match.
6. Click **Next**.
7. The system will check for errors and search for duplicates.
8. Errors found with your files will need to be resolved within the spreadsheet and

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saved. Click **Restart** to try again.
9. Fields that need to be resolved can be done on the next screen. Fix the errors and click Next.
10. Review and click **Import**.
11. It may take several minutes for the upload to complete.
12. Your teams and players will appear on the roster.

ROSTERING

The rostering tool can be used whether you've imported your teams or created them manually. It can be especially useful to make small changes to the roster if you initially imported teams.

1. From within the season, click **Rostering**.
2. To the right of *Assign*, select either **Players** or **Staff**.
3. You can also search by name or use the Filters button to pull up a list of players/staff.
4. Drag the player/staff member to their team.

SUBMITTING TEAMS

Teams may be submitted at any time. If there are any changes to the roster, you must submit the roster again.

1. From the Teams tab, click the "Team Name."
2. Click **Share Roster**.
3. Check that the organization and division are correct. Click **Next**.
4. Choose the "Staff Role" from the drop-down.
5. Click **Next**.
6. Review the roster and click **Share**.
7. All players will receive a membership during submission, you will be prompted to obtain/select them.
8. Review the memberships that have been selected as needed, and click **Review Order**.
9. If a person has missing information, click **Add Information**. Enter the required information, and click **Continue**.

Tournament Teams

CREATE TEAMS

NOTE: Tournament teams must be added within the same season as the regular season teams.

1. From HQ, click **Competition** > **Season Management**.
2. Within the season where regular season rosters were submitted, click the **Teams** tab.

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- To comply with tournament rules, players submitted in tournament rosters must have been submitted to a regular season roster within the same season .

3. Click **Add Teams** and select either Manually Add Teams or Import Teams.
   - If creating teams manually, roster players before moving on to team submission.

SUBMIT TEAMS

NOTE: Before submitting teams, your season needs to be connected to the affiliated organization. If the regular season rosters have been submitted previously, the connection to the affiliated organization is already in place.

1. From the *Teams* tab, click the "Team Name" to share.
2. Click **Share Roster**.
3. Check that the organization and tournament and division are correct. Click **Next**.
4. Choose the "Staff Role" from the drop-down.
5. Click **Next**.
6. Review the roster and click **Share**.

APPROVAL STATUSES

Once teams have been submitted, the Affiliation's compliance rules are applied, and statuses will be given to the team, players, and staff. Learn more about approval statuses here.

NOTE: To ensure that rosters are approved, resubmit teams whenever changes are made to the rosters, including when players are added or dropped. Click here to learn more.

Team Roster Statuses

- **Done**: No errors or issues are present on the submitted team roster.
- **Needs Attention**: Errors or violations exist for the team and/or individual member(s).

Player/Staff Individual Statuses

- **Approved**: All compliance and eligibility rules have been completed correctly.
- **Incomplete**: There is missing information regarding compliance or eligibility rules.
- **Denied**: A compliance rule has been violated.

Independent Teams

CREATE AN INDEPENDENT TEAM

If your organization is not using SportsEngine HQ, you can create an Independent team

1. Click **Create Team**.
2. Enter the team name and select the Sport, Sate/Metro and district, and Season.
3. Click **Create Team**.

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4. Confirm the state/metro connection by clicking **Yes, Create Team**.

ADD PEOPLE TO AN INDEPENDENT TEAM ROSTER

NOTE: The following steps are intended for teams who have not yet rostered any players or staff.

1. From your Team Center, click the **Roster** tab.
2. Click **Add People**.
3. Enter the first and last name and participant type.
   - If the participant type is "Staff", you have the option to grant Team Administrator access.
4. Enter in email addresses, gender, and birth-date.
   - These details are needed to properly identify users within the system.
   - To add more people, check the box for "Add Another. "
5. Click **All Done**.

Once people have been rostered, the Add People button will no longer be visible on the Roster page. To add people after rostering has begun:

1. Navigate to the team Roster page.
2. In the upper-right corner, click the **three-dots icon** >Add Person.
3. Enter the details and click **All Done** once complete.

SHARE INDEPENDENT TEAMS

1. From the Roster, click the **three-dot icon** in the upper-right.
2. Click **Share Roster to USA Softball**.
3. Confirm by clicking **Got It**.
   - If player and staff members are missing information, click **Submit Later** and return to share once information has been completed.
   - **NOTE:** In order to verify eligibility, most governing bodies will require birth-date, gender, and email address,
4. Select the correct division from the drop-down and click **Next**.
5. Select people and assign roles, once complete click **Next**.
   - If members without memberships are rostered, a notice will appear to prompt membership purchases for the needed members. Click **Get Memberships** to continue and complete the share process.

MANAGE INDEPENDENT TEAMS

Once members have been added to the team, the *Roster* tab will display the members with their names, participation types, permissions, status and messaging preferences.

Use the three-dot icon in the upper-right corner of the roster to:

- Add People or Invite People

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- Send Messages
- Print Contact Lists and Rosters
- Share Rosters with USA Softball

TEAM COMPLIANCE

Ensure your team meets division rules from the roster page.

1. From the *Roster*, click the **Division** tab.
2. Click **Team Compliance.**
   - If division rules are not met, "Needs Attention" will appear to the division.
   - Division rules will be displayed with a red or green icon to indicate if rules have been met.

Team Management

Once teams are submitted, you may need to make adjustments and communicate with teams to keep them informed.

ADD/REMOVE PLAYERS & STAFF FROM THE SUBMITTED ROSTER

There may be times that you need to adjust the roster to add or remove players/staff.

1. From HQ, go to **Competition > Season Management**.
2. Under your season, click **Rostering**.
3. From the Assign drop-down, choose either **Players** or **Staff**.

To add additional players/staff:

1. Use the search or filters to pull up the appropriate list of players/staff members.
2. Drag the player/staff member to their team.

To remove players/staff:

1. To the right of the "team name," under the *Action* column, click **Expand**.
2. To the right of the player/staff member you wish to remove, click the **x**.
3. Type in the player/staff member's "name."
4. Click **Delete**.

Deleting a player/staff member from the roster removes their connection with the affiliated season and cannot be undone.

After adjusting a previously submitted roster, you will need to resubmit the changes. If a team has unsubmitted changes, they appear on the Teams tab with an Affiliation Status of "Needs Attention." There will also be an icon next to the team name alerting the admin of unsaved changes to the roster.

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TO RESUBMIT PLAYERS/STAFF:

If there are any differences between the default and shared roster, Review Changes button will appear and prompt the user to submit or ignore the changes.

1. Click on the **Teams** tab within your season.
2. Click the "team name" that needs attention.
3. From the slide-out, click **Review Changes**.
4. Check the rows of each change you would like to re-share.
5. Once all desired rows are checked, click **Share**.

HOW TO MESSAGE TEAMS

1. Sign in and go to "SportsEngine HQ."
2. From the left navigation menu, click **Competition > Season Management**.
3. Find the season, and click **Teams**.
4. To message a single team, click the **three vertical dots** to the right of the team name. To message multiple teams, select them, and click the **three vertical dots** to the right of the search bar.
5. Click **Message Team(s).**
6. Select the recipients, and fill out the subject line, message, and attach any files.
7. Click **Send**.

Eligibility

To ensure official rosters may be printed, all team members must be eligible for the roster to be "Done." Eligibility is comprised of meeting compliance rules and completing individual eligibility requirements.

ELIGIBILITY SEARCH

To find members and their eligibility status:

1. Navigate to "SportsEngine HQ."
2. From the left navigation menu, click **Members** > **Eligibility Search**.
3. Use the search bar or the filter button to the right of the search bar to narrow results.
   - When using the search box, enter at least 2 characters of the member's name, email, or member ID.
   - Filter options include Membership and Age Range.
4. Members meeting the criteria appear with their Eligibility, Membership, State-Metro, District, and League-Club.
   - Click on a member's name to view more information about their eligibility requirements, save their membership card, or view their profile.
   - To the right of the membership, click the **three vertical dots** to cancel or refresh eligibility.

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CHECK TEAM ELIGIBILITY

Teams breaking roster rules, or players that have not completed their eligibility requirements may prevent the official roster from being printed. After submitting the team, possible team roster statuses are:

- **Done:** No errors or issues are present on the submitted team roster.
- **Needs Attention:** Errors or violations exist for the team and/or individual member(s).

Player/staff individual statuses count towards the minimum and maximum roster size compliance rule. Possible statuses are:

- **Approved:** All compliance and eligibility rules have been completed correctly.
- **Incomplete:** There is missing information regarding compliance or eligibility rules.
- **Denied:** A compliance rule has been violated.

To review the team:

1. Within HQ, navigate to **Competition > Season Management**.
2. Under your affiliated season, click **Teams**.
   - Under the *Affiliation Status*, teams that need to be reviewed will appear as **Needs Attention**.
3. Click the "Team Name.
4. Open the affiliated drop-down to review any roster errors.
   - If rostered members are listed as *Needs Attention*, you can click their name to see the items preventing them from being eligible so you can act.

NOTE: If changes are made to players or staff members, you will need to resubmit the roster to USA Softball.

SEND ELIGIBILITY REMINDERS TO INDIVIDUAL INELIGIBLE MEMBERS

1. Sign in and go to "SportsEngine HQ."
2. From the left navigation menu, click **Competition > Season Management**.
3. Find the season, and click **Teams**.
4. Click on the team name that "Needs Attention."
5. Expand the tab that "Needs Attention."
6. Scroll to the Incomplete member and click their name.
7. To the right of the ineligible membership, click the **three vertical dots**.
8. Click **Send Reminder**.

SEND ELIGIBILITY REMINDERS TO MULTIPLE INELIGIBLE MEMBERS

1. Sign in and go to "SportsEngine HQ."
2. From the left navigation menu, click **Members > Memberships**.
3. To the right of the membership, click **View Active Eligibility**.
4. Select the ineligible members by checking the box to the left of their name(s), and click **Send Reminders**.

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BULK SHARING MEMBERSHIP LINKS

Use a registration to create a Smart Group of members to send club assignments to.

NOTE: You will need to have a registration with registered members to complete the following steps.

1. Within SportsEngine HQ, click **Registration** > **Registrations**.
2. Click on the "title" of the registration you want to create the group from.
3. Create a Saved Report.
4. In the top-right of the saved report, click **Create Smart Group**.
5. Name the group and click **Create Smart Group**.
6. In the left-hand navigation, click **Members** > **Memberships**.
7. Click the **USA Softball** tab.
8. Click the link to **Send, view, remind or revoke club assignments**.
9. In the upper-right corner, click **Send**.
10. In the *To* drop-down box, enter in the name of the smart group that was created.
11. Customize the subject line and welcome message as needed, then click **Send**.
    - Upon receiving the club assignment, members will be prompted to complete information that will direct them to the correct membership type.

VERIFY PROOF OF BIRTH

Proof of Birth is a one-time credential attached to the player's profile. Proof of birth documents are submitted by the member and reviewed by the State/Metro. Learn more about how members can upload proof of birth documents here.

Print Rosters

Once all rosters are "Done" and team members are eligible, you may print the official rosters.

PRINTING INDIVIDUAL ROSTERS

Once your rosters' are "Done," team members are eligible, and the roster no longer has a "Needs Attention" affiliation status, you may print your official rosters by:

1. Within HQ, navigate to **Competition > Season Management**.
2. Under your affiliated season, click **Teams**.
3. Click the **Team Name**.
4. To the right of your affiliation's name, click the **three vertical dots**.
5. Click **Print Roster**.
6. A print screen opens.

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PRINT MULTIPLE ROSTERS

Once your rosters are "Done," and team members are eligible, you may print your official rosters by:

1. Within HQ, navigate to **Competition > Season Management**.
2. Under your affiliated season, click **Teams**.
3. Select the teams to print rosters.
4. To the right of the search bar, click the **three vertical dots**.
5. Click **Print League Rosters**.

Additional Help Resources

NEED HELP TAB

The blue Need Help? tab is available to logged in users and is located on the right-hand side of every page in SportsEngine HQ. Here you will find specific content for USA Softball under the Walkthrough and Academy tabs.

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