Online Membership System
Renewals Summary Guide
Welcome

This summary has been created in order to guide you around the system, describing how to complete most of the tasks required for an Online Administrator to make the club’s annual return.

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How to activate your account

Welcome to the Online Membership System (OMS), the web address is: www.swimmingmembers.org

If this is the first time you’ve visited the OMS, you will need to activate your account. Follow the instructions below, you will need to have your membership number, the main email address held by association & surname to hand.

On the main Welcome Page, there is a “Log-On Area” and there is an “Activate Membership” area. If you cannot remember your password select the ‘Forgotten Password’ button and the system will email you a link to set up a new password.

To activate your account click on the grey “Activate Membership” tab and the three main fields will appear.

Type your details into all three fields and then click on the blue Activate button.
Activation Enabled

If the activation was successful a message will appear stating that an email has been sent to your email address.

Please open the email from Swim England OMS which will be titled: “Swim England Online Membership System - Account activation enabled” and click on the link contained within it.

Please also check your spam & junk email folders as the email may have arrived in one of these rather than your inbox.

⭐ Please note – this message is only valid for 24 hours, after that time the link will expire and you will need to start the activation process again.

Once you’ve clicked on the link within the email, the OMS website opens to display the Activate Account page, please enter your membership number here and then click on the green Continue button.

The top half of the Activate Account page now displays your details; these details are held in our central database and can be amended once logged into the OMS. If this is not you, press cancel.

The bottom half of the Activate Account page requires a password to be entered and then confirmed. This password needs to be at least 8 Characters long and can be made up of Alpha & Numeric characters.

When you have confirmed your password please click on the green “Continue” button, which will display options to select your role.

Activation Failed

If the details you have entered cannot be matched to the information held on our database you will see the following message “Activation Failed” and then a description of the information that has not matched. Please check the information and re-enter if necessary – you may need to refresh your internet browser page before clicking the Activate button again.

If the system still does not recognise your information please contact us on 01509 640727 or renewals@swimming.org
Congratulations – you have successfully activated your account and are now logged into the OMS, please keep a note of the password you have entered and your membership number as you will need them in the future to log in.

If you are not registered with Swim England as the Club Registration Officer or Online Administrator, you will not be able access the Club Membership details upon login. Instead the Personal membership page will be displayed.

If you are registered with Swim England as the Club Registration Officer or Administrator, you will see the option to “Select your role”

To Log out of the OMS use the blue “Log-Out” button

Any problems please call Membership Services on 01509 640727.

Logging In

On the main Welcome Page, there is a “Log-On Area” displayed.

Enter your membership number & password – Your password is the password entered when activating your account. If you cannot remember the password select Forgotten Password.

When you have entered these two fields click on the blue “Log-On” button.

Selecting your Role

Upon logging in you immediately land on the “Welcome Back” page, which contains the Welcome message, “Log-Out” and “Help” buttons.

Here you will also see a “Login As” box, where you need to choose your role.
The roles you have been registered for are displayed here, using this example the individual logged in, is an Online Administrator for Macclesfield Swimming Club and is a member.

Therefore this individual would need to choose whether they want to login as the Club Administrator to access the Club’s membership information or if they want to view their own membership information.

If an individual has links with multiple clubs and the Online Administrator has set them up with the access, they will be seen here.

Please note – if you are a Club Officer and need to access the Member information for your club via the OMS, please contact the Online Administrator for your Club.

Click on the blue “Select” button to the right of the role you wish to log in as.

Navigating Around the OMS

When you choose the role of Club Online Administrator or Deputy Online Administrator you will arrive in the main view which may look similar to the image below. The main page is made up of 6 parts:

★ OMS heading buttons
★ Welcome with log-out & help buttons
★ SE Logo
★ My Messages
★ My Shortcuts
★ Club Summary
Annual Renewals Summary Guide for the OMS

**OMS heading buttons;** please see the table below for a brief description of each item:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Club Home</td>
<td>View the Club Summary page</td>
</tr>
<tr>
<td>Membership</td>
<td>Search for and view all Club members, add new members, make amendments to</td>
</tr>
<tr>
<td></td>
<td>members information and lapse &amp; renew members at renewals time</td>
</tr>
<tr>
<td>Batch Management</td>
<td>View submitted &amp; pre-submitted batches of new, amended, lapsed &amp; renewed</td>
</tr>
<tr>
<td></td>
<td>members for this club</td>
</tr>
<tr>
<td>Online</td>
<td>View the OMS Club Online Administrator and Deputy Online Administrators, add</td>
</tr>
<tr>
<td>Administrators</td>
<td>new Deputy Online Administrator’s users and amend user rights.</td>
</tr>
<tr>
<td></td>
<td>Add or remove Club Officers and amend Club Officers personal details</td>
</tr>
<tr>
<td>Reports</td>
<td>Access different reports available in the OMS and then export information</td>
</tr>
<tr>
<td></td>
<td>to Microsoft Excel and printable PDF’s</td>
</tr>
<tr>
<td>Messages</td>
<td>View communication messages posted to your club</td>
</tr>
<tr>
<td>Change Login Context</td>
<td>Log Out of your current log in and swap roles i.e. to another club if you</td>
</tr>
<tr>
<td></td>
<td>have access or log in to your membership information</td>
</tr>
</tbody>
</table>

The **Club Summary** page gives you the handy Club summary so you can see exactly who has access to the Club information on OMS and your total membership with category breakdown in one place.

- **Recent Activity - Last log in date & time**
- **Total Members** – Gives the total number of active members in red, with a breakdown below of each category
- **Administrators** – Number of Online Administrators who can access the Club information on the OMS in red, with their names detailed below
- **My Messages** – the most recent regional, national and Club specific messages will be displayed here
- **View Club Officers and Administrators** – View more details about the individuals listed on the left
Annual Renewals Summary Guide for the OMS

The membership information is reflective of the data behind it, to access membership information you need to use the “Membership” option in the menu bar at the top of the page.

The My Messages area is where we will post communication messages that we think are important and relevant to you and your club.

Next to some of the headings or options in the OMS, you may see the question mark button.

Hovering over this button will produce a tool tip telling you more information about this heading or option.

Membership

This section will outline how to search for and view all Club members, add new members, make amendments to member’s information and lapse & renew members at renewals time.

Navigating around the membership page

Click on the Membership heading and in the list that appears click on “Membership”

All current Club members are displayed in a table similar to the image below, the table columns are made up of some of the member’s information:
The icons tell you at a glance the status of each person’s membership. Please see table below for the explanation of the descriptions:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✅ = Fees payable to this club</td>
<td>This is the member's longest unbroken membership Club</td>
</tr>
<tr>
<td>✅ = Member subject to unsubmitted batch</td>
<td>Members information has been amended / updated / renewed / lapsed but the batch has not yet been submitted to the SE</td>
</tr>
<tr>
<td>✅ = Member subject to unconfirmed amendment for another club</td>
<td>Members belongs to another Club and their information is in the process of being amended / updated / renewed / lapsed</td>
</tr>
<tr>
<td>✅ = Member subject to verification by the governing body</td>
<td>SE are processing a previously submitted batch</td>
</tr>
</tbody>
</table>

In the table multiple rows of members are displayed at any one time, you can move through these details by clicking on the page numbers to jump to specific pages, or you can click on the next / previous buttons to jump through the membership records.

First page Previous page Next page Last page

Printing a membership list

The “Print” button on this page will print a list of your membership. A full & detailed membership list can be printed from the Reports page.

Searching for a Member

Directly underneath the red Club Membership banner are the search options:

Choose a filter – click in this dropdown list to select the different categories of membership and then click on the Search button to run the search

The main search box – type in the surname or part of the surname and then click on the Search button to run the search

Clear – This X button clears any of the search filters you may have applied

Both the “main search box” and the “choose a filter” can be used at the same time to narrow the search criteria and display a more specific result.
Viewing Member details

As described above, the table columns are made up of some of the member’s information.

For more information about that member and to amend the details, click on the “View & Amend details” button in the detail column for that member.

In the page that opens there are three tabs; Member Detail, Clubs / Qualifications and Amendments.

The Member Detail Tab

The member detail tab is the default tab that opens when you click on the “Details” button; the tab contains information with regards to the individual’s membership, recorded on our database.

Amending a Members details

To make day to day amendments to a member’s record, overtype the information in the relevant field and, in the Action drop down list, click on “Amend” then click on the green “Save” button. If you are amending a telephone number or email address please select the tick box next to the field.

When you visit the main membership page the table will display “Amend” in the Action column for that member, to notify you that their record has been amended.

If you have no changes or have made a mistake click on the red “Cancel” button.

The Other Info Tab

The Other Info tab lists the names of clubs the individual is a member of, the joining dates, club codes, officer roles and status of membership.

The Amendments Tab

The amendments tab will list the amendments that have been made on this individual’s record.
Add a New Member

From the main membership page, click on the button for “Add New Member”.

Complete the information in the online form; the fields marked with the red dots are mandatory fields that must be completed before any record can be saved.

Please note – if you are entering a telephone number and an email address tick the small box next to the fields to ensure the system picks up the information. You will only be able to select one main telephone number and one main email address.

Please also complete the data protection opt out as relevant, on the right side of the page and ensure that if your member has chosen that they do not want their details visible on the British Swimming website, you tick the box for Website Visibility. This will ensure the information is not published to the website.

Once the fields have been completed, click on the green “Continue” button.

The next page displayed will confirm that the new member has been added, select the appropriate option to “Add another new member” or go “Back to the membership list”.

Should any of the mandatory fields be missing or incomplete, a message will be displayed, detailing those mandatory fields that are missing.
Lapse Member Finder

The newest feature of the OMS is the Lapse Member Finder which can be found under the Membership tab.

The Lapse Member Finder allows you to reinstate a member that has been removed from your OMS within the last three months. You will be able to find their details by searching for their name, membership number, postcode or date of birth.

The member's details will appear in a list, select the Details button to open their Member Details page. To reinstate the member select the Add New button at the bottom of the page which will add their details to a pre-submission batch, submit the batch to us and we will process their membership. Once the batch shows as complete you will be able to find the member in your Membership List.
Renewals / Lapses

During the renewals period, which is from the start of a new year and until the Club has renewed and lapsed all of its members, the main membership table will also include “Lapse” & “Renew” buttons for quickness in the clubs renewal processing. Renewing & lapsing members creates one batch, this means you do not have to renew & lapse all of your members in one sitting.

Click the button for renew or lapse in the corresponding row of the table for each member.

After you have renewed / lapsed the members on the first page this needs to be submitted (added) to the batch, by clicking on the submit button.

Then click on the “next page button” to renew & lapse other members, ensuring each page of renewals / lapses has been submitted (added) to the current batch.

Should any member details require amending / updating click on the “Detail” button and overtype the information in the relevant fields. Then select Renew from the Action drop down list. However, if you have already renewed the member, click on the green “Save” button to save the amendment.
Understanding Batches

The OMS links back to our main database, requiring any amendments, new members, lapses or renewals to be submitted in batches.

For example, you may log into the OMS, renew 5 of your members, amend 2 member’s details and lapse 1 member. Remember to click on the “Submit” button before moving to the next page.

Clicking on the “Submit” button will either:

- Create a new batch, or
- Add these amendments to an existing batch ready for submission to SE.

Should the “Submit” button be pressed without any amendment having been made, the message below will appear in the main Membership table.

- Please Note – Changes to submitted amendments can be made in the “Batch Management” page whilst the batch is in Pre Submission status. Therefore if you’ve made a mistake and submitted (added) them to the batch, you can still amend.

Batches can be accessed by clicking on the “Batch Management” heading button at the top of any page in the OMS. To view the contents of any batch, click on the batch number. During the renewals period you will be able to lapse/renew every member from within the batch, remember to save each page as you go along and submit after each member has been actioned.

If the batch status is “PreSubmission”, you are able make further amendments to members and delete new members.

<table>
<thead>
<tr>
<th>Batch No.</th>
<th>Status</th>
<th>Added</th>
<th>View Estimate</th>
</tr>
</thead>
</table>

- Status – displays the current status of the batch:
  - PreSubmission – not yet sent to SE
  - Submitted – batch sent to SE

- View Estimate – Opens another Internet Browser window and displays the estimated membership fees now due

**Please Note**

- Changes to submitted amendments can be made in the “Batch Management” page whilst the batch is in Pre Submission status. Therefore if you’ve made a mistake and submitted (added) them to the batch, you can still amend.

**Batches can be accessed by clicking on the “Batch Management” heading button at the top of any page in the OMS.** To view the contents of any batch, click on the batch number. During the renewals period you will be able to lapse/renew every member from within the batch, remember to save each page as you go along and submit after each member has been actioned.

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- Status – displays the current status of the batch:
  - PreSubmission – not yet sent to SE
  - Submitted – batch sent to SE

- View Estimate – Opens another Internet Browser window and displays the estimated membership fees now due
Submitting batches to Swim England (SE)

Once all of your members have been renewed or lapsed, with amendments made, the next step is to submit the batch to SE.

Click on the batch number to open the batch

A table will be displayed listing all of your members and giving you a final opportunity to amend.

Should you wish to amend any details, click on the green “Amend” pencil button in the amend column.

To ensure that these amendments are saved, click on the green “Save” button at the bottom of the table.

When you are ready to submit the batch to SE, click on the blue “Submit” button at the bottom of the table.

Click on the “OK” button in the confirmation message to continue. A page will appear with further instructions and 2 tick boxes.

The Batch Submitted confirmation message will be displayed, with a link to return to the batch listing.

When you click on the link and re-visit the batch listing the batch status will now state “Submitted”
Annual Renewals Summary Guide for the OMS

If you try and submit the batch before putting an action against every member the OMS will display a message, you will be able to view a report showing those without an action.

The batch was not submitted because of the following errors:
All members must have their membership set to either “Renew” or “Lapse”

Please correct the errors and and resubmit the batch for processing

Once the batch is submitted the membership team will process, there are a few different stages before it is complete:
- Pre-submission
- Awaiting payment (only during renewals)
- Match members
- Admin amends
- Complete

Access & User Rights to OMS

Understanding the access rights for OMS

Clubs membership information will only be able to be accessed initially by the Club Registration Officer who will be the Club Online Administrator (COA).

Once the COA has activated their account they will login using their own membership number or email address and password. If the Member holds the role of COA at more than one club, they will then be prompted to select which club they wish to work with, as described in the “Logging In” section.

Once the COA has activated their account, they are able to assign up to three other Club Officers access to this area of the OMS and assign them user rights as they see fit.

Please Note - It is recommended that only the COA can submit a built batch.

The main Club Summary page displays the number & names of administrators who have access to the membership for the club. On the right there is a link to “View Club Officers” and “View Administrators”
Annual Renewals Summary Guide for the OMS

Club Officers are: Coaches, Secretary, Chair, Treasurer etc

Administrators are: COA and any deputies the COA has nominated

To become a Deputy Administrator, the members needs to also be a verified Club Officer.

COA’s can customise the user rights of their deputies granting access to different sections of the OMS based upon the requirements of the club, this can be found under the Club Administrators page.

Sections of OMS:

- View Membership
- View and amend Officers
- Submit Batches
- View Financials
- Build Batch
- View Reports

★ Please Note - Club Officer's must first be verified members of the club to be able to give them rights in the OMS

Adding a Club Officer

Click on the “View Club Officers” button

This page displays the full list of Club Officers in a table with the ability to view more details about that individual’s membership.

Click on the “Add New Officer” button, on the right hand side of the Officers section.

Type in the Membership Number or either name and then click on the “Find Members” button. Both fields can be populated to narrow your search.

If no members are found matching the criteria, the following message will be displayed:

No matching member found
If more than one member matching the criteria is found, the results will be displayed with the option to “Select” the member or to “View” more details about that member.

When selected, the member’s details are displayed with a drop down list requiring a role to be selected. Select the appropriate role and click the “Add New” button.

The table of Club Officers will then be displayed with the new Officer added.

If the Officer has more than one role please repeat this process.
Annual Renewals Summary Guide for the OMS

Adding a Club Online Administrator

Only Club Officers can be given the role of Deputy Administrator in the OMS.

Click on the “View Administrators” button

This page displays the full list of OMS Administrators in a table, with the ability to view more details about that individual’s membership.

Click on the “Add New Administrator” button, on the right hand side of the Club Online Administrators section.

Select the Club Officer you would like to make Deputy Administrator from the dropdown list, and then click on “Select”.

In the table that is displayed, place a tick in the box for the relevant permissions that you would like the Deputy Administrator to have. Then click on the green “Save” button.

⭐ Please Note – It is recommended that only the COA can submit a batch.

The table of OMS Administrators will then be displayed with the new addition added.

You can edit the amount of access each Deputy has by clicking on the green edit button next to their name. You can also remove a Deputy by clicking the red remove button.

If you wish to make another Club Officer the main Online Administrator please contact the Membership Services office on 01509640727 or renewals@swimming.org
Reports

The OMS has a suite of reports available, which can be accessed by the “Reports” heading button at the top of the page.

Specify any filters for the report, then click on the “Run” button for the report you require.

★ Please Note – Depending upon the security settings on the computer you are using, you may need to allow pop ups from the OMS

Troubleshooting

I can’t log in

If the “Invalid Username and Password” message is displayed, please check and re-enter the information.

If you still cannot log into your account, contact us using our details below:

Tel: 01509 640727
Email: renewals@swimming.org

How do I reset my password?

If you cannot remember your password or would like to reset it, click on the link for “Forgotten Password?”

Enter your membership number and your email address entered in the activation process and then click on the blue “Send” button

You will then receive an email from SE OMS containing a link back to the site. Click on the link in the email. The page displayed is the reset password page, select a new password and continue, please make a note of the new password for future use.

★ Please Note – The email may go into your spam or junk mail, please check these if you don’t receive the email into your inbox.

Accessing Help in the OMS

To access help in the OMS, a red “Help” button is displayed at the top of every page. Click on the red “Help” button to access the full user guide and contact details for SE.
About the Online Membership System (OMS)

What is the OMS?

OMS will allow certain club officers to view live club members data from our database via a secure web-link.

OMS will allow club officers to renew or lapse members, add new members, amend member details, calculate fees due, print / export membership reports.

OMS will provide members with the ability to amend some of their own personal details via a secure web-link.

OMS will provide functionality to facilitate communication between the clubs and SE

OMS will provide a scalable and flexible application to accommodate the current and future data storage strategies of SE

The benefits of using OMS

OMS will accelerate the annual renewals processing and day to day registrations.

OMS will help you share the work load.

To note

OMS will replace the Club Management System (CMS) and current paper based processes.

OMS is not a system to replace existing club management software e.g. Swim Club Manager.

Accessing the OMS

Club Officers will require an internet connection. It is preferable that a broadband connection is available to ensure an acceptable speed of data transfer, which will provide a positive user experience.

To access the OMS the club officer will require their computer to run one of the many free and readily available browsers such as the latest versions of Internet Explorer, Mozilla Firefox or Google Chrome.

User Rights

Club Online Administrator (COA)

Clubs membership information will only be able to be accessed initially by the Club Registration Officer who will be the Club Online Administrator (COA).

Once the COA has activated their account they will login using their own membership number or email address and password. If the Member holds the role of COA at more than one club, they will then be prompted to select which club they wish to work with. Once logged-in in the context of a given club the officer will only be able to view and perform operations on the membership of that club.
Deputy Administrators

Once the COA has activated their account they will be able to assign up to three other Club Officers access to this area of the OMS and assign them user rights as they see fit. **It is recommended that only the COA can submit a built batch.**

- View Membership
- View and amend Officers
- Submit Batches
- View Financials
- Build Batch
- View Reports

The club officer needs to be verified by SE before they can be given Deputy rights.

Login Context

Once a COA, or one of their assigned Deputies, has successfully activated their account and logged in they must then choose whether they wish to view their clubs membership or view their own profile to make amendments (from Spring 2012). If the COA or Deputy has access to more than one clubs membership details, they will be able to select which club they wish to work with.

If the COA or Deputy chooses to access their clubs membership they will be taken to the Clubs page. This page will contain a summary of the club information, a list of the most recent messages received and a link to the users chosen shortcuts.

Submitted Data

Once data has been submitted it will be verified by SE.

> Please note that during renewals new members cannot be sent separately, therefore all new members are insured at the point the club has added them to a batch. After renewals new members will be insured once data has been submitted to SE.

Annual Return

It is important to note that clubs will need to submit their data through the OMS and payment before the 28th February deadline.

If data and payment are not with SE by the 28th February clubs will be automatically suspended and it’s members will not be insured.

In addition clubs will be fined 10% of its previous year’s membership fees or £50 whichever is the greater. Competitive members belonging to suspended Clubs may not participate in competitions.

Contact Details

Swim England Membership Services Department
SportPark, Loughborough University
3 Oakwood Drive
Loughborough
Leicestershire
LE11 3QF

Tel: 01509 640727
Email: renewals@swimming.org