

Online Membership System

Summary Guide

www.swimmingmembers.org




Online Membership System


Welcome to our new look Online Membership System.

If this is the first time you have used OMS please click on Activate Membership to get started.

Any questions [click here](#) to download our Renewals User Guide, email [renewals](#) or call us on 01509 640727



LOG-ON AREA ACTIVATE MEMBERSHIP

USERNAME 

PASSWORD

[> LOG-IN](#) [> FORGOTTEN PASSWORD?](#)

NEWS

OMS Summary Guide

Welcome

This summary has been created to guide you through the Online Membership System so you are able to view and amend your membership details as well as completing the tasks required as an Online Administrator, particularly during the annual renewal period.

Contents

Welcome	2
Activating Your Account	3
Activation Enabled	4
Activation Failed	6
Logging In	7
Logging in as Member	8
Member Detail	8
Workforce	8
Clubs Information	9
Amending your Ranked Club	9
Uploading Certificates/Qualifications	9
Amendments	10
Data Protection Choices	10
Diversity Profile	10
Logging in as Club Administrator	11
Navigating Around the OMS as an Online Administrator	11
Club Home	11
Club Details	12
Amending Club Details	12
Membership	14
Membership	14
Add New Member	16
Invite New Member	18
View Member Invites	19
Lapse Member Finder	20
Batch Management	21
Removing/Amending Members in Batch Management	22
Submitting a Batch	23
Club Admin	24
Adding Members to the Workforce	25
Reports	26
Club Finances	26
Credit Balance	26
Unapplied Invoices	26
Downloading Invoices	27
Membership Reports	27
Messages	28
Change Login	28

OMS Summary Guide

Activating Your Account

Welcome to the Online Membership System (OMS). If this is the first time you have visited the OMS, you will need to activate your account. This can be found on the homepage (www.swimmingmembers.org) followed by selecting the “**Activate Membership**” tab as illustrated below. To activate your account, you will need the following:

- Your membership number
- The email address held by Swim England
- Your surname

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LOG-ON AREA **ACTIVATE MEMBERSHIP**


MEMBERSHIP NUMBER ?

EMAIL ADDRESS

SURNAME

> ACTIVATE

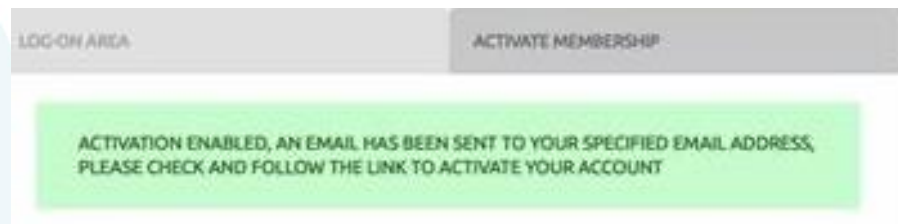
OMS Summary Guide

LOG-ON AREA	ACTIVATE MEMBERSHIP
MEMBERSHIP NUMBER	<input type="text" value="123456"/> 
EMAIL ADDRESS	<input type="text" value="renewals@swimming.org"/>
SURNAME	<input type="text" value="Bloggs"/>
	<input type="button" value=" > ACTIVATE"/>

Once you have filled the above boxes with the required information, please select “**Activate**”.

Activation Enabled

If the activation was successful, a message will appear informing you that an email has been sent to the specified email address.



Please open this email within your inbox (please ensure you check your spam and junk mail folders) which will be titled “*ASA Online Membership System – Account Activation enabled*”. You will need to click on the link within this email to complete your activation.

PLEASE NOTE:

This link is only valid for 24 hours. This link will expire after this period and you will need to restart the activation process.

Once you have clicked the link within the email, it will direct you back to the OMS. You will again need your membership number to finish activating your account. Once you have entered your membership number, please select “**Continue**”.

OMS Summary Guide

ACTIVATE ACCOUNT

Membership Number •

The next page will display your details (name, DOB and address) that are held within our central database and can be amended once you have logged in to OMS. If this is not you, please select “**Cancel**”.

The bottom of this page requires you to create a password. As instructed, this password must be at least 8 characters long and contain a mix of letters and numbers. Once you have created and confirmed your password, please select “**Continue**”.

Name

Date of Birth

Address

Town

Postcode

Please confirm your details and provide a password. If these are not your details please press the cancel button.

Passwords must be at least 8 characters long. They must contain a mix of letters and numbers. At least one of each uppercase, lowercase, and number must be present. Symbols and spaces are not permitted. Repetition is not permitted (e.g., "e;yhhyh"e;).

Password •

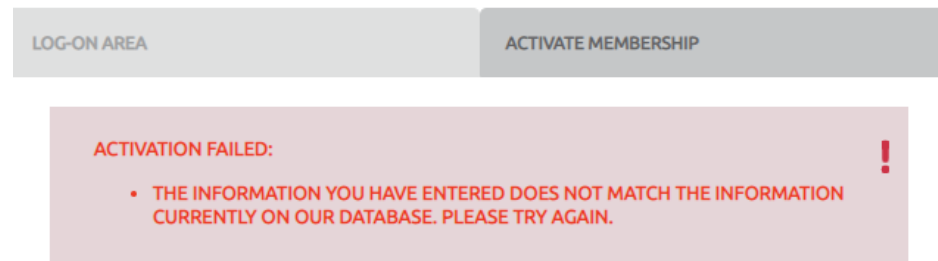
Confirm Password •

Congratulations! You have successfully activated your OMS account. Please keep a note of your password and membership number as you will need these to log in.

OMS Summary Guide

Activation Failed

If the details you have entered (membership number, email address or surname) do not match the information held within our database, you will be presented with the below message.



Please check the information you have entered and re-enter if necessary. You may need to refresh the page before re-selecting “**Activate**”.

If the system is still not recognising your information, please contact the membership team either via email or telephone who will be able to check and update your details:

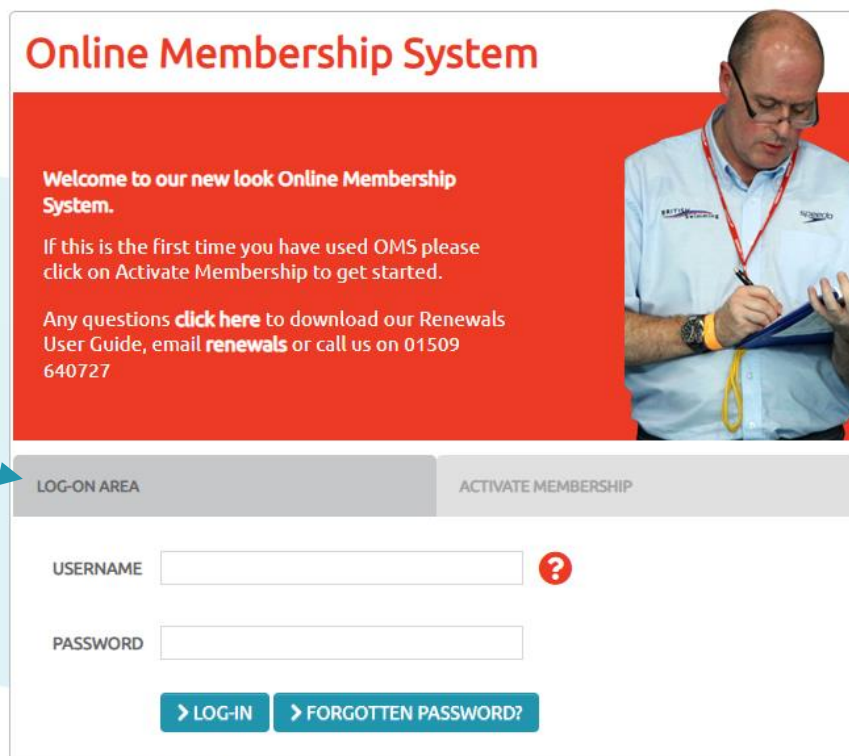
renewals@swimming.org

01509 640727

OMS Summary Guide

Logging In

On the welcome page, there is a “Log-On Area” as displayed below.



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If this is the first time you have used OMS please click on Activate Membership to get started.

Any questions [click here](#) to download our Renewals User Guide, email [renewals](#) or call us on 01509 640727

LOG-ON AREA ACTIVATE MEMBERSHIP

USERNAME ?

PASSWORD

> LOG-IN > FORGOTTEN PASSWORD?

You will need to enter your username (this will either be your membership number or registered email address) and password. Your password is the password entered upon activating your account.

When you have entered both your username and password, please select the blue “Log-In” button.

PLEASE NOTE:

If you cannot remember your password, please select “Forgotten Password?”.

Upon logging in you will be presented with a “Welcome Back” message which provides an option to “Log Out” and “Help”. Selecting “Help” will provide contact details for the Swim England Membership team and this OMS Summary Guide.

PLEASE NOTE:

If you are an Online Administrator or Deputy for your club, you will be given the option to either “Login as Club Online Administrator” or “Login as Member”. If you are logging in as a Club Administrator, please see page 11 for further instructions.

OMS Summary Guide

Logging in as Member

Once you have logged into your member profile, you will be taken to the **Member Summary** page which will include any notifications, your most recent activity, the list of clubs you are a member of, your personal details and an option to change your password.

To view and amend any details linked to your membership, please select **“Edit Details”**. This will list the following tabs:

- **Member Detail**
- **Workforce**
- **Clubs Information**
- **Amendments**
- **Data Protection Choices**
- **Diversity Profile**

Member Detail

The member detail tab will list your personal details and club category.

You are able to amend all the details listed on this page aside from your membership number, category and sex.

To amend/upgrade your club category, please contact your club in order to get this change processed. This must be requested through your fee paying club which is the club you have been a member of the longest.

To amend your sex, you will need to contact the membership team (renewals@swimming.org) in order to get this processed. We may need further details from you when processing this change however this is on a case-by-case basis.

If you are a **Club Compete** member, your country of representation will be listed here. If you need to amend this, please contact the membership team (renewals@swimming.org) in order to get this amended. We may need further details from you when processing this change however this is on a case-by-case basis.

Workforce

If you are a committee member, a technical official, a coach/teacher or support the club in various roles, this will be listed within this tab.

If your position is missing from this tab, please contact your club's online administrator to ensure this has been added correctly.

OMS Summary Guide

Clubs Information

The Clubs Information tab will list the details of the club(s) you are registered with and any relevant qualifications/certificates such as officials, teaching and coaching qualifications as well as Safeguarding and DBS certificates.

Amending your Ranked Club:

If you need to update your ranked club, you are able to do this by ticking the box under “**Ranked**”. Your ranked club is the club that will appear on the ranking lists. The ranked club is normally the club whose name you will compete under in major events.

PLEASE NOTE:

You can only select one ranked club however you can update this as and when required.

Uploading Certificates/Qualifications:

Teaching & Coaching

- There is not an option to upload teaching or coaching qualifications via OMS. If you have your certificate(s), please email renewals@swimming.org with your membership number in order to get this added to your membership record. If you **DO NOT** have your certificate(s), please email either coachingcertificates@swimming.org OR info@swimenglandqualifications.com. For assistance with Team Manager certificates, please contact volunteering@swimming.org.

Officials & Timekeepers

- Officials and Timekeeper certificates must be uploaded as instructed by the assessor and/or your officials coordinator
- For assistance with Officials Qualifications or Timekeeper Certificates, please contact swimmingofficials@swimming.org
- If you have queries regarding your Officials Licence, please contact officialslicensing@swimming.org

Safeguarding

- To view/upload your Safeguarding certificate(s), you will need to register/login to your Member Options account – https://www.swimmingresults.org/member_options/
- Once you have registered/logged into Member Options, selection the option to upload certificates where you are able to select the relevant safeguarding qualification from a dropdown menu
- If you are struggling to upload this via Member Options, please send a copy of your Safeguarding certificate along with your membership number to renewals@swimming.org
- If you have recently completed the Swim England Safeguarding Training and have not yet received your certificate, please contact IOSadmin@swimming.org who will be able to retrieve this for you
- To view a list of the Safeguarding qualifications we accept, please follow this link: <https://www.swimming.org/swimengland/wavepower-child-safeguarding-for-clubs/>

OMS Summary Guide

DBS

- If you hold a valid DBS, this will be displayed here, as illustrated below:

DBS Status	Valid From	Valid To
DBS Check	27/07/2022	27/07/2025

> BACK > SAVE

- If you have queries or issues regarding DBS, please either contact the club's Welfare Officer or our DBS team (DBS@swimming.org)

Amendments

The amendments tab will display any amendments made by your club (past and present).

Data Protection Choices

The Data Protection Choices tab is where you are able to select and amend what personal details and/or qualifications/certificates are visible on Swim England's swimmingresults.org website. Please ensure you have read through our Privacy Policy to ensure you are aware of how your personal data will be used.

PLEASE NOTE:

Hiding your details could affect your results and the way your times are reported if you are planning to compete.

Diversity Profile

The Diversity Profile tab is an optional tab that provides Swim England with information that identifies areas of under representation and helps guide our inclusion strategies.

There is an option to "Prefer Not to Say" for each question if you do not wish to disclose this information.

Please ensure you have selected "**Save**" at this bottom of this tab once you have updated your Diversity Profile.

PLEASE NOTE:

Updating your Birth Sex within the Diversity Tab does not update your membership record and as such, you will need to contact the membership team to get this formally amended.

OMS Summary Guide

Logging in as Club Administrator

Once you have selected “Login as Club Administrator”, you will be taken to the club’s home page which will look like the below:

The screenshot shows the OMS interface for a club administrator. At the top, there is a navigation bar with buttons for Club Home, Club Details, Membership, Batch Management, Club Admin, Reports, Messages, and Change Login. Below this is a teal header for the 'Online Membership System' with a welcome message for Martyn and links for LOG-OUT and HELP. The main content area is divided into several sections:

- Warning:** A red warning icon and text stating: "Your club details have not been checked in the last 3 months. [Click here](#) and confirm details are correct".
- Recent activity:** A clock icon and text: "Martyn Swimming was last logged into this swimming club at 08:47 on 18/07/2022". Below it, "Batch TESQ00123 has not been submitted yet."
- Administrators:** A section titled "This club has 4 administrators:" listing Martyn Swimming, Graham Spratt, Emmajc Langham, and Christopher Bostock. To the right are links for "View governance positions", "View administrators", and "View finance details".
- Total Members:** A summary showing 52 total members, broken down by category: SE Club Train (14), SE Club Compete (27), and SE Club Support (11).
- Volunteer Prompt:** A question: "How many of your Club Train and Compete members volunteer in your club?" with an input field containing '200' and a green arrow button.
- MY MESSAGES:** A section titled "SUBMIT YOUR RENEWALS BY 28TH FEBRUARY" with a red cross icon. The message text reads: "Dear Registration Officer Renewals batches must be completed and submitted to Swim England Membership Services by 28th February 2022 this includes your OMS submission and payment. Failure to submit your full renewals by this time will result in your club being suspended and a late fee of either 10% of your 2021 renewal fees or £50.00 whichever is the greater. If you have any queries with regard to completing your renewals please contact Swim England Membership Services Team by emailing renewals@swimming.org. If you have completed and returned your renewal information please accept our thanks and ignore this message. Kind regards Swim England Membership Services".
- EXTERNAL LINKS:** A section with links to "British Swimming Website", "Swim England Coronavirus Advice", "www.swimming.org", and "www.swimmingresults.org".

At the bottom right, it says "Site produced by: nemisvs".

Navigating Around the OMS as an Online Administrator

Club Home

Upon logging in to the club’s account, you will automatically be taken to the Club’s Home Page which lists the **Club Summary**. This section will detail any urgent notifications, recent activity, a list of online administrators and a total count of members within the club with a breakdown for each category.

The bottom of this section will prompt you to list any members who volunteer within the club who are Club Compete or Club Train members. Please ensure this is completed and/or updated during the renewals period (1st Jan – 28th Feb).

OMS Summary Guide

To the right of this section, there is a “**My Messages**” tab which will list the most recent messages specific to the club, county or region. If you wish to delete these messages, please select the red **X** in the top right-hand corner of the message.

There is also an “**External Links**” tab which will detail other relevant websites which may be of use to yourself and other members.

Club Details

The Club Details tab lists the information specific to the club which is displayed via Poolfinder (<https://www.swimming.org/poolfinder/>). This includes the club name, the club’s website, a list of pools that are used for training and the specific activities and disciplines offered to members within the club.

CLUB DETAILS

Club Name

Website

Pools Used For Training

Activities offered

Competitors	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Improvers	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Newcomers	<input type="radio"/> Yes	<input checked="" type="radio"/> No

I confirm I have checked these details and they're correct.

Disciplines	Offering	Recruiting For
Swimming	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No
Para-Swimming	<input type="checkbox"/>	
Masters Swimming	<input type="checkbox"/>	
Diving	<input type="checkbox"/>	
High Diving	<input type="checkbox"/>	
Masters Diving	<input type="checkbox"/>	
Artistic Swimming	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No
Masters Artistic Swimming	<input type="checkbox"/>	
Water Polo	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No
Masters Water Polo	<input type="checkbox"/>	
Open Water	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No
Masters Open Water	<input type="checkbox"/>	
Learn to Swim	<input type="checkbox"/>	

Amending Club Details:

Club Name & Website

- If you wish to amend the club’s name, please contact the region in order to start the name changing process.
- To update the link to the club’s website, please copy this link into the box next to “**Website**”. You may only add one website.

OMS Summary Guide

Pools Used for Training

- To add the pools used for training, please select **“Add Pool”**.
- After selecting “Add Pool”, a pop-up box will appear which will prompt you to enter the name of the pool.
- As you begin to type, if we have this pool listed within our database, it will pop-up with the relevant pool. If this is the correct pool, please select this. This will then be automatically added to the Club Details page.
- You can do this multiple times and add as many pools as necessary.

Pools Used For Training

> ADD POOL

Start to enter the name of the pool below to find an existing pool to add to your club.

Pool Name

If you can not find the pool you're trying to add press the 'Contact Swim England' button to send a message to Swim England to add it for you.

CONTACT SWIM ENGLAND

- If a specific pool does not pop-up, please select **“Contact Swim England”** and enter the relevant details in order for us to update and add this manually.
- To remove a pool, please select the red **X** next to the pool name.

Enter pool name and postcode below then press the 'Send' button to send a message to Swim England to add it for you.

Pool Name

Postcode

SEND

CANCEL

Activities Offered

This section prompts you to indicate what type of member the club is able to accommodate:

- **Competitors** – Those with experience in a club setting training towards competition.
- **Improvers** – Those with some club experience looking to develop their skills.
- **Newcomers** – Those who are new to the club environment or the sport.
- **Once selected, please ensure you tick the box underneath these options which prompts you to confirm that these details are correct.**

Disciplines

This section details the relevant disciplines of the club.

- If you are primarily a swimming club, for example, you would tick the box underneath **“Offering”** for Swimming.
- If you have space to take on new members, you will need to select “Yes” under the **“Recruiting For”** heading. If your club is currently full for the specific discipline, please select “No”.

PLEASE NOTE:

Please ensure you select the green “Save” button at the bottom of the Club Details tab to save and update your changes.

Disciplines

	Offering	Recruiting For	
Swimming	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Para-Swimming	<input type="checkbox"/>		
Masters Swimming	<input type="checkbox"/>		
Diving	<input type="checkbox"/>		
High Diving	<input type="checkbox"/>		
Masters Diving	<input type="checkbox"/>		
Artistic Swimming	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Masters Artistic Swimming	<input type="checkbox"/>		
Water Polo	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Masters Water Polo	<input type="checkbox"/>		
Open Water	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Masters Open Water	<input type="checkbox"/>		
Learn to Swim	<input type="checkbox"/>		

OMS Summary Guide

Membership

This section will outline how to search for and view all club members, add new members, make amendments to current members and how to both lapse and renew members. This section is particularly important for the annual renewal period (1st Jan – 28th Feb).

Membership

The first option under this tab is “**Membership**”. This will display all current club members as illustrated below:

The screenshot shows the OMS interface. At the top, there is a navigation menu with options: Club Home, Club Details, Membership, Batch Management, Club Admin, Reports, Messages, and Change Login. Below this is a blue header for the 'Online Membership System' with a 'LOG-OUT' button and a 'HELP' link. The main content area is titled 'CLUB MEMBERSHIP' and includes a legend for membership statuses:

- = Fees payable to this club
- = Member subject to unsubmitted batch
- = Member subject to unconfirmed amendment for another club
- = Member subject to verification by the governing body

 Below the legend is a search bar with filters for 'Choose a filter', 'Enter forename or part to search...', and 'Enter surname or part to search...'. There are also buttons for 'ADD NEW MEMBER', 'PRINT', and 'ADD TO BATCH'. The main table lists members with columns for First Name, Last Name, No., Category, D.O.B., Sex, Join Date, Action, Renew, Lapse, Workforce, and Detail. The table shows several members with various status icons in the first column.

A vertical navigation menu for the Membership section. The menu items are:

- Membership (highlighted in yellow)
- Add New Member
- Invite New Member
- View Member Invites
- Lapse Member Finder
- SE Club Train
- SE Club Compete
- SE Club Support

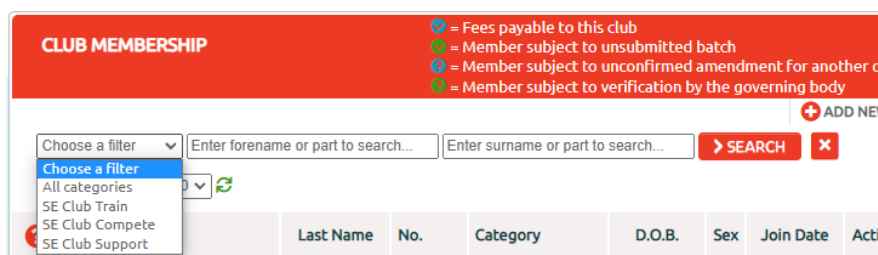
Takes you to the last page of club members

The top of this section provides a key to indicate the status of each individual's membership. The description for each status is detailed below:

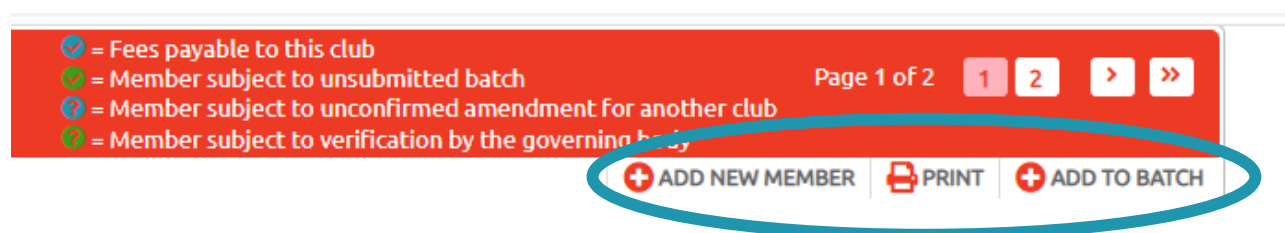
= Fees payable to this club	<p>This indicates that the club is this member's fee paying club. The fee paying club is the member's longest unbroken membership club.</p>
= Member subject to unsubmitted batch	<p>This member's information has been amended / updated / renewed / lapsed however the batch has not yet been submitted for processing.</p>
= Member subject to unconfirmed amendment for another club	<p>This member belongs to another club and their information is in the process of being amended / updated / renewed / lapsed.</p>
= Member subject to verification by the governing body	<p>This indicates that Swim England are processing a submitted batch that included this member.</p>

OMS Summary Guide

You are able to check the status of members using the search function as illustrated below:



Underneath the key there is an option to **Add New Members**, **Print** and **Add to Batch**, as illustrated below:



Adding New Members

- To add a new member, please click **“Add New Member”**
- Please see page 16 for detailed instructions on adding new members

Print

- Selecting **“Print”** will open a new web page to print a full list of all club members as displayed on the Club Membership page
- You will also be able to save a PDF version of this list if required using the **“Print”** function by amending the print destination to **“Save as PDF”**

Add To Batch

- **This function is specifically for the annual renewal period and will not be visible throughout the rest of the membership year**
- As you work through the membership list and choose either “Renew” or “Lapse”, you are able to bulk add these amendments to your renewals batch through selecting **“Add To Batch”**

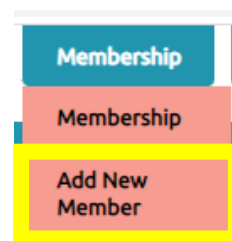
PLEASE NOTE:

The **“Renew”** and **“Workforce”** options will only be available during the annual renewal period (1st Jan – 28th Feb). If a member is over the age of 14, you will need to select whether this member is workforce or not. Any amendments to workforce throughout the rest of the membership year will need to be done via the Club Admin tab.

OMS Summary Guide

Add New Member

The second option listed under the Membership tab is to add a new member. Once you have selected this, you will be taken to the below page:



ADD NEW MEMBER

Category: ?

Membership Number (if known):

No fees payable? ?

Title: ?

First Name: ?

Initials: ?

Last Name: ?

Known As: ?

Date of Birth: / /

Postcode:

Address:

Town:

County:

Home Telephone:

Work Telephone:

Mobile Telephone:

An Email Address is a mandatory field. If the member is under 13 then a parent e-mail needs to be added

Home Email:

Work Email:

Parent Email:

Sex: ?

Join Date: / /

Mandatory Fields

Please tick any of the relevant boxes below.

Activity

- Diver
- High Diver
- Master Diver
- Open Water Swimmer
- Master Open Water Swimmer
- Swimmer
- Master Swimmer
- Para-Swimmer
- Artistic Swimmer
- Master Artistic Swimmer
- Water Polo Player
- Master Water Polo Player
- Official / Volunteer
- Paid Workforce
- Other (Parent / Life Member)
- Educator

Swim England privacy policy

Here at Swim England we take our members privacy seriously and will only use their personal information in accordance with our [Privacy Policy](#). Please ensure your members have read the policy and understand how their personal data will be used.

The three different categories that can be selected for a member are as follows:

- **Club Train** - For individuals in a club who are either learning to swim, or training in any discipline
- **Club Compete** - For individuals who are part of a club and looking to compete in any discipline in open competitions
- **Club Support** - For anyone involved in a club who volunteers or is employed by the club, including committee members, officers, teachers and coaches as well as any parent members

PLEASE NOTE:

You will only be able to amend a member's category if you are their fee paying club.

- If you are aware of a current or previous membership number, please enter this in the relevant field (this will enable the membership team to link the correct record to the correct member if they are a current or past member of Swim England)
- Under the “**Activity**” field, you are able to select multiple options if, for example, this member is both a swimmer and a volunteer

Please ensure you are inputting the correct information for the member however if you are struggling please contact the membership team who will be able to assist (renewals@swimming.org)

OMS Summary Guide

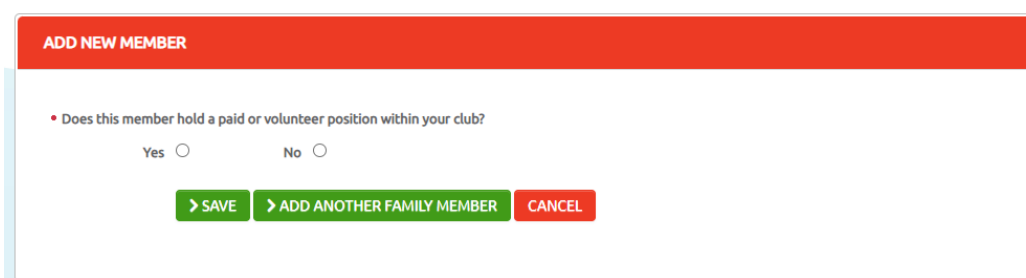
PLEASE NOTE:

Please ensure you tick next to the main phone number and email address as this is what Swim England will use to contact the member and what the member will need to login to their own account and various other affiliated websites. You will only be able to tick one main phone number and one main email address.

Once you have inputted the relevant information, please select the green “**Save**” button at the bottom right-hand corner of the screen. This will add this member to a new or existing batch (if not yet submitted). For more information on batch management, please see page 21.

If you are adding multiple members that belong to the same family, please select “**Save And Add A Family Member**” as this will save you having to re-add related information for these members.

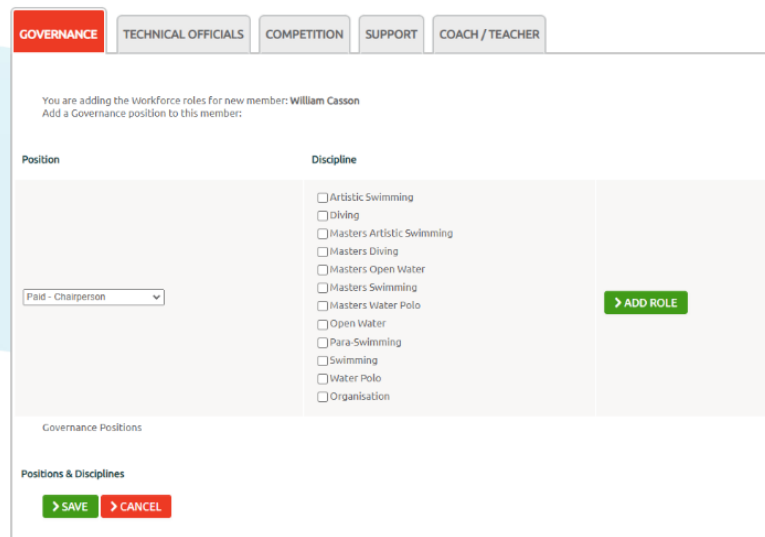
Once you have selected “**Save**”, you will then need to mark whether this member is part of the club’s workforce before continuing as illustrated below:



If this member is a part of the club’s workforce, you will then need to mark their specific position(s) within the club.

You are able to add as many roles as needed however please ensure you select “**Add Role**” for each position before selecting “**Save**”.

For more details on club workforce, please see page 24.



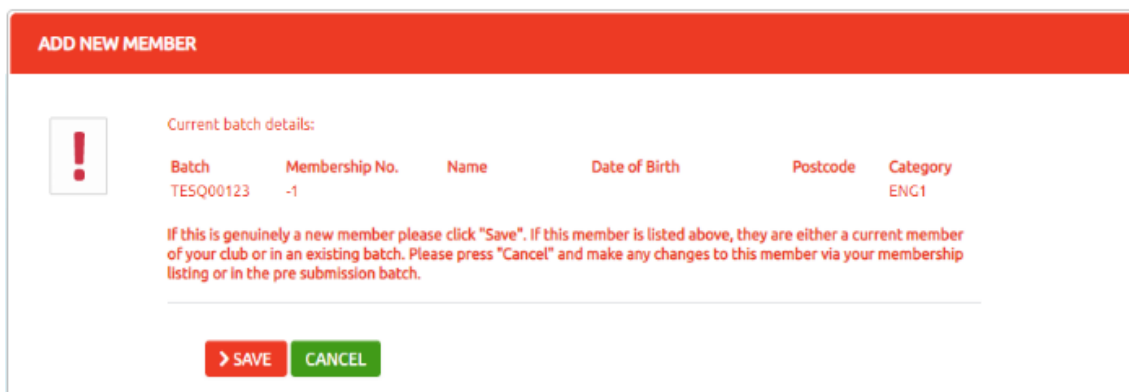
PLEASE NOTE:

The roles added for each tab will only show on the corresponding tab and will not show across all tabs. Once you have added all the relevant positions, please select “**Save**”.

OMS Summary Guide

Cannot Add Member:

If there is a member in a batch with similar or identical details to the member you are trying to add, you will be presented with the below message:



ADD NEW MEMBER

! Current batch details:

Batch	Membership No.	Name	Date of Birth	Postcode	Category
TESQ00123	-1				ENG1

If this is genuinely a new member please click "Save". If this member is listed above, they are either a current member of your club or in an existing batch. Please press "Cancel" and make any changes to this member via your membership listing or in the pre submission batch.

> SAVE CANCEL

If you are adding a genuine new member who is not already in the batch, please continue by selecting **"Save"**.

If the details you have entered are identical to the ones being flagged, please select **"Cancel"** as this will prevent you adding duplicate members to the same batch.

If you add them as a duplicate by mistake and need to remove them, please see page 23 for further details.

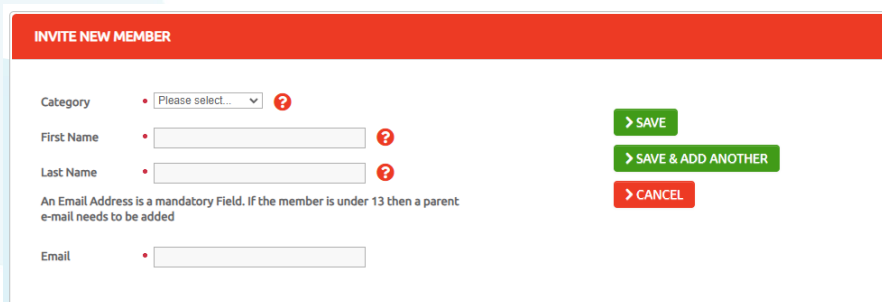
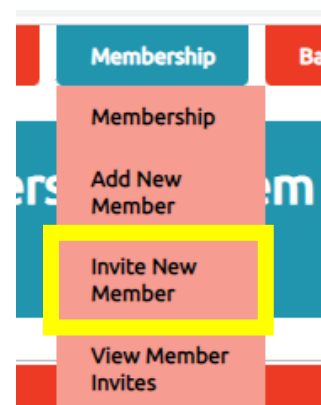
Invite New Member

An alternative method of adding a new member to the club is via the Invite New Member option highlighted in yellow.

PLEASE NOTE:

Please ensure you have the prospective member's email address to hand before proceeding with this option.

Once you are ready to send the invite, you will be presented with the below screen:



INVITE NEW MEMBER

Category • Please select... ?

First Name • ?

Last Name • ?

An Email Address is a mandatory Field. If the member is under 13 then a parent e-mail needs to be added

Email •

> SAVE

> SAVE & ADD ANOTHER

> CANCEL

OMS Summary Guide

Please ensure you have completed ALL of the fields listed before selecting “Save”. Once you have selected “Save”, the invite will be sent to the member.

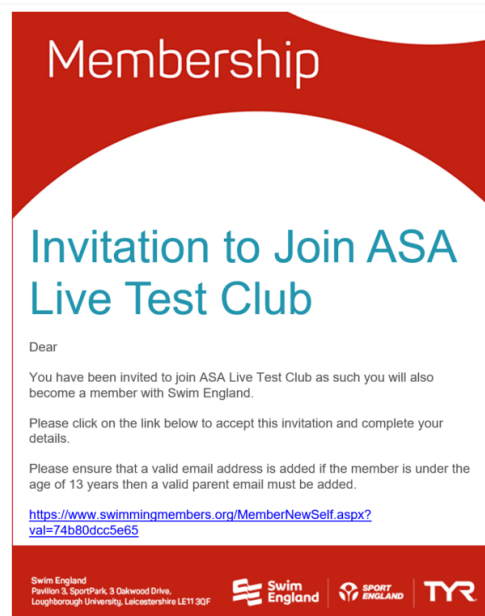
If you wish to send multiple invites, please select “Save & Add Another”.

To the right is a copy of the email that is sent to the prospective member.

The link at the bottom of this page will take them to the same page as “Add New Member” (page 16 of this guide) where they can fill their details out themselves.

Even if this individual is already a member of another club or Swim England, they will still need to complete the form to become a member of the club.

When we process the batch, and if they hold a current or previous record with Swim England, we will match this information with this record.





View Member Invites

Underneath the Invite New Member tab there is an option to View Member Invites.

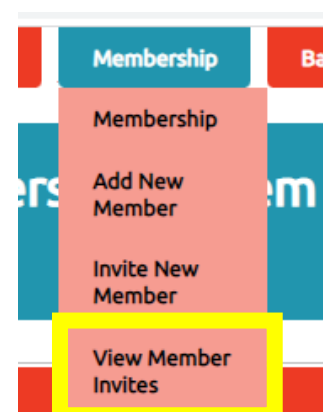
This page will display all invites that have been sent to individuals and what date the invite was sent.

Resending or Cancelling Member Invites:


Under the heading “Tools”, you have the option to either resend or cancel the invite.

Invite Date	Tools
21/08/2018	 

- To resend the invite, please select the green arrows
- To cancel the invite, please select the red cross



Once the member has completed the membership form, a green plus button will appear next to their name to prompt you to complete the above-mentioned workforce question (page 18).

Renewals	Swimming	renewals@swimming.org	03/08/2022	
----------	----------	-----------------------	------------	---------------------------------------------------------------------------------------

OMS Summary Guide

Once this process has been completed, they will automatically be added to a batch and will disappear from the View Member Invites tab.

Lapse Member Finder

If you need to search for and/or re-add a lapsed member of the club, you are able to do this via the Lapse Member Finder tab.

PLEASE NOTE:

This function only stores the lapsed member's details for 3 months from the date they were lapsed. If after 3 months, you will need to add them as a new member.

MEMBER FINDER

Membership No.: Firstname:

 Lastname: Date of Birth:

Membership No.	First Name	Last Name	Date of Birth	Source	Details
319138	Martyn H	Hudson	01/01/2019	Core	<input type="button" value="➔"/>

To re-add this member, you will need to select the arrow underneath **“Details”**.

Please check through these details and make any necessary amendments.

Once these details have been checked, please select **“Save”** at the bottom of the page. This will automatically add this previously lapsed member to a batch.

The last three options listed under the Membership Tab are as follows:

SE Club Train - lists all current Club Train members of the club

SE Club Compete - lists all current Club Compete members of the club

SE Club Support - lists all current Club Support members of the club

OMS Summary Guide

Batch Management

BATCH HISTORY						
Page 1 of 16 1 2 3 4 5 6 7 8 9 10 > >>						
Click here to view your club finances						
Batches for Year						
All <input type="button" value="SEARCH"/> <input type="button" value="X"/>						
Batch No.	Date Submitted	Estimated Fees at Submission	Current Fees	Member Summary	Status	Estimate
TESQ00123	18/12/2021 (added) 0	(unsubmitted)	£940.25	Amend/Renew Club Compete - 3 New Club Compete - 1 Lapse Club Compete - 1 Renew Club Compete - 23 New Club Support - 1 Renew Club Support - 11 New Club Train - 2 Renew Club Train - 13 <hr/> PreSubmission: 53	Pre-Submission	View Estimate
TESQ00823	23/05/2022 0	£0.00	£0.00	<hr/> Complete: 1	Complete	View Invoice
TESQ00723	23/05/2022 0	£0.00	£0.00	<hr/> Complete: 1	Complete	View Invoice
TESQ00623	08/02/2022 0	£10.35	£10.35	New Club Train - 1 <hr/> Complete: 1	Complete	View Invoice
TESQ00523	08/02/2022 0	£29.15	£29.15	New Club Compete - 1 <hr/> Complete: 1	Complete	View Invoice
TESQ00423	08/02/2022 0	£29.15	£29.15	New Club Compete - 1 <hr/> Complete: 1	Complete	View Invoice

Batch No.	Each time a batch is created, a new batch number is generated. Please quote this number when contacting Swim England with batch queries.
Date Submitted	States the date and time a batch was last amended/updated.
Estimated Fees at Submission	Total fees for the batch at submission. This will say unsubmitted for batches in pre-submission.
Current Fees	<ul style="list-style-type: none"> If the batch has not been submitted/processed, this will match estimated fees. Once the batch has been processed and the members have been correctly matched, this will show the correct fees for the batch at point of completion.
Member Summary	Breakdown of categories of membership/amendments to be made

OMS Summary Guide

Status	<p>This will display either pre-submission, awaiting ITC, match members, admin amendments, or complete.</p> <ul style="list-style-type: none"> • Awaiting ITC – awaiting international transfer certificate applies to water polo players, specifically those who have registered to compete for a European club in recent years and therefore need to transfer back. • Match Members/Admin Amendments – currently being processed by the membership team.
Estimate	<ul style="list-style-type: none"> • If the batch has not yet submitted, you are able to view an estimate invoice to view the breakdown of categories and fees. • Once the batch has been processed and completed, you will be able to view and download the invoice.

The Batch Management tab will list all batches created by the club and the Swim England membership team, including batches from previous years and those not yet submitted.

PLEASE NOTE: There may be a difference between estimated and current fees once the batch has been processed. This is because some members may have been incorrectly marked as not owing fees or may be second claim members to your club which would either reduce or increase the batch total.

Removing/Amending Members in Batch Management

- To remove a member from a batch, please select the red **X** within the “Remove” column
- To amend a member within a batch, please select the pencil button within the “Amend” column to make any necessary amendments before submitting the batch

Please ensure you have selected “Save” when making any amendments within the batch.

BATCH DETAILS

Renewals Batch: **TESQ00123** Fees: **£940.25** (pre-submission)

Membership number <input type="text" value="Enter membership number..."/>	Forename <input type="text" value="Renewals"/>	Surname <input type="text" value="Swimming"/>	Category <input type="text" value="Please select..."/>	Action <input type="text" value="Please select..."/>
------------------------------------------------------------------------------	---------------------------------------------------	--------------------------------------------------	-----------------------------------------------------------	---------------------------------------------------------

Results per Page:

Name	No.	Category	D.O.B.	Fees payable	Action	Renew	Lapse	Workforce	Remove	Amend
Renewals Swimming		Club Compete	01/01/1980	£29.15	New					

OMS Summary Guide

- If you have submitted the batch and need to remove or amend a member, please contact the renewals team with the batch reference number and relevant amendments – renewals@swimming.org

Submitting a Batch

When you have submitted the batch, you will be presented with the below page:

CONFIRM BATCH SUBMISSION

Before clicking on "Continue" below, you must tick or complete the following:

- The club will make full and prompt payment for this batch, if required.
- The club will make any additional payments due to lapse of members by other clubs.
- The club has provided a copy of the Swim England privacy policy to all new members within this batch.

Payment is required within 7 days of your batch submission.

Please find our bank details as follows:

Bank Name: Lloyds

Sort Code: 30-65-85.

Account Number: 49344968.

Account Name: ASA (Swim England) Limited

*****Once payment has been made please send an e-mail to: -
membershipaccountqueries@swimming.org With the following information: - Club Name, Club Code, Amount of Payment, Batch Number, Date of Transfer.

Note:
Please make your cheque payable to Swim England and record the club code and the batch number on the back of the cheque.
Send cheques to Swim England Memberships, Pavilion 3, SportPark, 3 Oakwood Drive, Loughborough University, LE11 3QF.

[> CONTINUE](#)

Please ensure you have read and ticked the three statements before proceeding.

Payment is required within 7 days of your batch submission. Once payment has been made, please email membershipaccountqueries@swimming.org with the following information:

- Club Name
- Club Code
- Amount of Payment
- Batch Number
- Date of Transfer

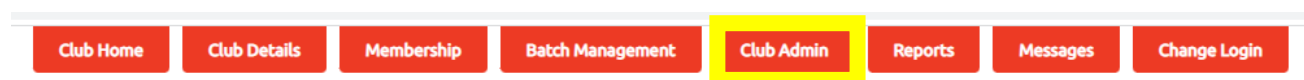
PLEASE NOTE:

If you are paying via bank transfer, please ensure you have taken note of the SE bank details when submitting a batch in order to make a payment. If you have any issues with payment, please contact membershipaccountqueries@swimming.org

OMS Summary Guide

Club Admin

The club admin tab allows the club to add and remove workforce, set up governance positions and allows the main online administrator to set up four additional deputies to access the Online Membership System.



Governance	The Governance tab is for the main workforce positions in the club such as secretary, treasurer, chairperson and welfare officer among others
Technical Officials	The technical officials tab is for any officials registered with the club
Competition Positions	The competition positions tab is for any members who assist with competitions, such as chaperones, team managers and event organisers amongst other positions
Support Positions	The support positions is for those who are not covered by the other workforce tabs, such as pool helpers, accreditation coordinators or lifeguards among others.
Club Coaches / Teachers	This tab is for any registered club coaches and/or teachers who are active with the club.
Online Administrators	Only the main online administrator for the club will have access to this tab. This is where additional deputies can be added and their privileges set.

PLEASE NOTE: the club can only have five online administrators at any one time. This consists of one main online administrator who will have access to set deputies and their privileges. If the club needs to add a new deputy to the club but is already at the maximum four additional administrators, one of the existing deputies will need removing.

OMS Summary Guide

Adding Members to the Workforce

Club Home Club Details Membership Batch Management Club Admin Reports Messages Change Login

Online Membership System > LOG-OUT > HELP

Welcome Back Martyn to ASA Live Test Club [TESQ]

Swim England

To add a member to their workforce position, you will need to click on the relevant drop down tab from the club admin tab and select "Add Member to Role"

GOVERNANCE POSITIONS

ADD MEMBER TO ROLE

Membership No.	Name	Email	Positions & Disciplines	DBS Expires	Safeguarding Expires	Detail
----------------	------	-------	-------------------------	-------------	----------------------	--------

Membership Number [] - OR - First Name [] Last Name []

FIND MEMBERS CANCEL

ADD MEMBER TO ROLE

Once you have pressed "Add Member to Role" you will be able to search for the member using the defined search boxes

ADD MEMBER TO ROLE

Membership No.	Name	Date of Birth	Position	Discipline
1421820	Martyn Swimming	01/01/1968	Paid - Chairperson	<input type="checkbox"/> Artistic Swimming <input type="checkbox"/> Diving <input type="checkbox"/> Masters Artistic Swimming <input type="checkbox"/> Masters Diving <input type="checkbox"/> Masters Open Water <input type="checkbox"/> Masters Swimming <input type="checkbox"/> Masters Water Polo <input type="checkbox"/> Open Water <input type="checkbox"/> Para-Swimming <input type="checkbox"/> Swimming <input type="checkbox"/> Water Polo <input type="checkbox"/> Organisation

ADD NEW CANCEL

Here you can select the position from the drop down and the discipline if relevant. Once these have been selected you can press "Add New" and this will add them to the listed workforce for the club. You can select as many disciplines as necessary.

Warning

Your club is missing these officer roles: Chairperson. [Click here](#) to manage your club's officers.

Discipline

- Artistic Swimming
- Diving
- Masters Artistic Swimming
- Masters Diving
- Masters Open Water
- Masters Swimming
- Masters Water Polo
- Open Water
- Para-Swimming
- Swimming
- Water Polo
- Organisation

PLEASE NOTE: If you log into OMS and see the above message, you will need to ensure the position, which is flagged (in this case "Chairperson"), is marked as "Organisation" in addition to any other tick boxes under discipline

OMS Summary Guide

Reports

The OMS has a variety of reports available to download which can be accessed via the “**Reports**” tab. The reports tab enables club administrators to view their club finances which will show all invoices raised and all payments received and processed by the membership team.

Please be aware this is where you will find and download the club personnel report which is required for SwimMark and Stronger Affiliation.



Club Finances

The Club Finances tab will display the club’s balance, payments and invoices as illustrated below.

CLUB FINANCES						
For account queries contact SE Membership Services. Email: membershipaccountqueries@swimming.org or Telephone: 01509 640 727						
Credit Balance:	£0.00	UNAPPLIED INVOICES		Show all items	SEARCH	X
Page 1 of 1						
Date	Invoice/Payment Details	Batch Ref.	Other Information	Amount	Type	Action
04/07/2022	REC307176		CC Batch : 001	-£10.00	Payment	
11/03/2022	MEMINV4129758	TWAL00123		£50.50	Invoice	£ £
10/01/2022	REC298877		CC BATCH: 00123	-£40.50	Payment	

Credit Balance

- If your credit balance is **green**, you are in credit and this will be used against future batches.
- If your credit balance is **red**, you owe the balance shown. Payments may take a few days to appear on your account – please allow up to 48 hours for this to be processed.

PLEASE NOTE:

If you owe over £200, the club’s account will be placed on a credit block. You will be unable to make membership amendments until this is cleared.

Unapplied Invoices

- Unapplied invoices will show batches that have been processed but not yet posted on the finance page.

OMS Summary Guide

Downloading Invoices

Type	Action
Payment	
Invoice	£ £
Payment	

Under the “Action” heading, you are able to download two types of invoices:

Selecting the [blue £](#) will trigger an automatic download of a **sales invoice** will detail an overview of the batch that has been processed.

Selecting the [green £](#) will trigger an automatic download of a **batch invoice** will include details of the member, category and the relevant fees associated to this batch.

Membership Reports

To download a report, you will need to ensure you have enabled pop-ups on your web browser.

When you are ready to download a report, please select the red “Run” button.



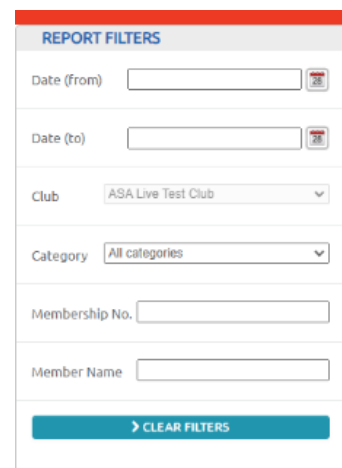
- **Club Personnel Record** – Lists all workforce in Excel format
- **Full Member Data Report** – Lists all members of the club in numerical order (membership number) in Excel format (includes DOB, address, discipline and qualifications)
- **Member Change Log** – Lists any changes a member has made in chronological order in Excel format
- **Member History** – Lists any amendments the club has made for club members (includes renewals and category changes) in Excel format
- **Membership Details** – List details of all members
- **Membership Summary** – Lists full names, DOB, country of representation, membership number and category of club members in Excel format
- **Club Officer List** – Lists all club officers, volunteers and vacant positions within the club in a report/printable format
- **Club Personnel Report** – This is the same as a Club Personnel Record report however is in a PDF format which is required for **SwimMark and Stronger Affiliation**
- **Club Teacher/Coach List** – Lists all teachers and coaches in a PDF format
- **Club Technical Official List** – Lists all technical officials and the relevant qualifications/courses in a report/printable format

OMS Summary Guide

- **Detailed Membership List** – Provides a detailed, printable/report format of all members within the club in category and surname order
- **Membership Numbers** – Lists the number of members for each category with a total count of club members in a printable/report format
- **Membership Renewal List** – Lists all members' status (i.e. renew or lapse) for the annual renewal period in surname order in a printable/report format
- **New and Amended Members** – Lists new members and recent amendments

You are also able to search for reports based on date, category and member using the report filters on the left-hand side of the screen.

Once you have added the relevant filters, please select the red **“Run”** button on the required report and this will only download the information specified within these filters.



The screenshot shows a 'REPORT FILTERS' form with the following fields and options:

- Date (from): 28
- Date (to): 28
- Club: ASA Live Test Club (dropdown)
- Category: All categories (dropdown)
- Membership No.:
- Member Name:
- A red button labeled 'RUN' is located to the right of the date fields.
- A blue button labeled 'CLEAR FILTERS' is at the bottom.

Messages

This tab will list all recent messages relevant to the club sent by the Swim England membership team.

Change Login

This tab will allow you to switch from the club's account to your personal account.