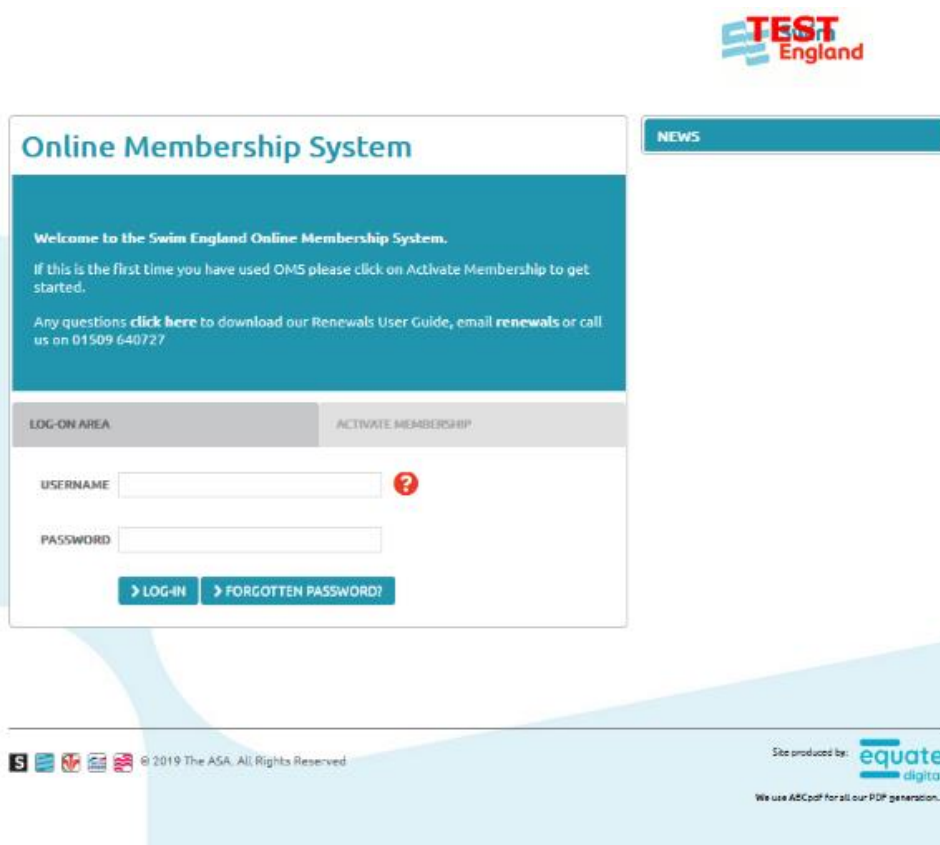


# Swim School Online Management System (SSOMS)

## User Guide

www.swimmingmembers.org



The screenshot shows the 'Online Membership System' interface. At the top right is a 'NEWS' button. The main content area has a blue header with the title 'Online Membership System'. Below the header, there is a welcome message: 'Welcome to the Swim England 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'. Below this is a 'LOG-ON AREA' with two tabs: 'LOG-ON AREA' (selected) and 'ACTIVATE MEMBERSHIP'. The 'LOG-ON AREA' contains a 'USERNAME' field with a red question mark icon, a 'PASSWORD' field, and two buttons: 'LOG-IN' and 'FORGOTTEN PASSWORD?'. At the bottom left, there are several small icons and the text '© 2019 The ASA. All Rights Reserved'. At the bottom right, it says 'Site produced by: equate digital' and 'We use ASCPdf for all our PDF generation...'.

# Swim School OMS Summary Guide

## Welcome

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

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# Swim School OMS Summary Guide

## Activating Your Account

Welcome to the Swim School Online Management System (SSOMS). If this is the first time you have visited the SSOMS, you will need to activate your account. SSOMS can be accessed by going to [www.swimmingmembers.org](http://www.swimmingmembers.org) select the “**Activate Membership**” tab as illustrated below

**Online Membership System**

Welcome to the Swim England 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](mailto:renewals) or call us on 01509 640727

LOG-ON AREA      **ACTIVATE MEMBERSHIP**

MEMBERSHIP NUMBER  ?

EMAIL ADDRESS

SURNAME

**> ACTIVATE**

. To activate your account, you will need the following:

- Your Swim England ID Number
- The email address held by Swim England
- Your surname

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

LOG-ON AREA      **ACTIVATE MEMBERSHIP**

MEMBERSHIP NUMBER  ?

EMAIL ADDRESS

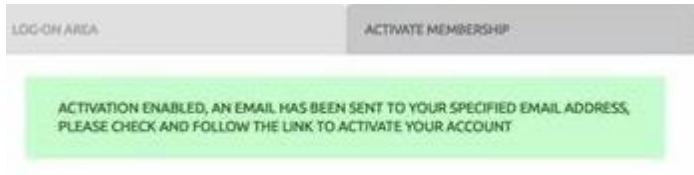
SURNAME

**> ACTIVATE**

# Swim School OMS Summary Guide

## Activation Enabled

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

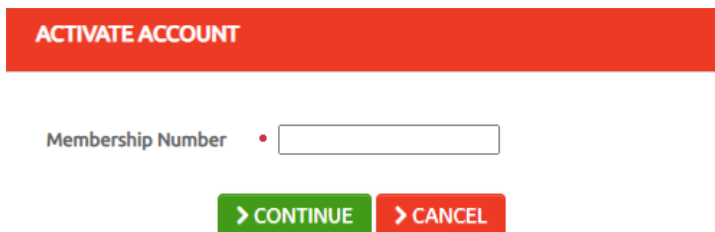


Please open this email within your inbox (please ensure you check your spam and junk mail folders) which will be titled “SE Online Membership System – Account Activation enabled”. You will need to click on the link within this email to complete your activation.

### **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 Swim England ID number to finish activating your account. Once you have entered your Swim England ID number in the box titled Membership Number, please select “Continue”.

A screenshot of the 'ACTIVATE ACCOUNT' form. The title 'ACTIVATE ACCOUNT' is in a red bar at the top. Below it, there is a label 'Membership Number' followed by a red dot and an empty text input box. At the bottom, there are two buttons: a green button with a right arrow and the text '> CONTINUE', and a red button with a right arrow and the text '> CANCEL'.

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 SSOMS. 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”.

# Swim School OMS Summary Guide

Name	<input type="text" value="John Smith"/>
Date of Birth	<input type="text" value="24/10/1967"/>
Address	<input type="text" value="5 Middle Croft Road"/>
	<input type="text" value="Tibberton"/>
	<input type="text"/>
Town	<input type="text" value="Newport"/>
Postcode	<input type="text" value="TF10 8LL"/>

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;yhhyhyh"e;).

Password	<input type="password"/>
Confirm Password	<input type="password"/>

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

## Activation Failed

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

LOG-ON AREA	ACTIVATE MEMBERSHIP
-------------	---------------------

**ACTIVATION FAILED:**

- THE INFORMATION YOU HAVE ENTERED DOES NOT MATCH THE INFORMATION CURRENTLY ON OUR DATABASE. PLEASE TRY AGAIN.

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 Swim School team either via email or telephone who will be able to check and update your details:

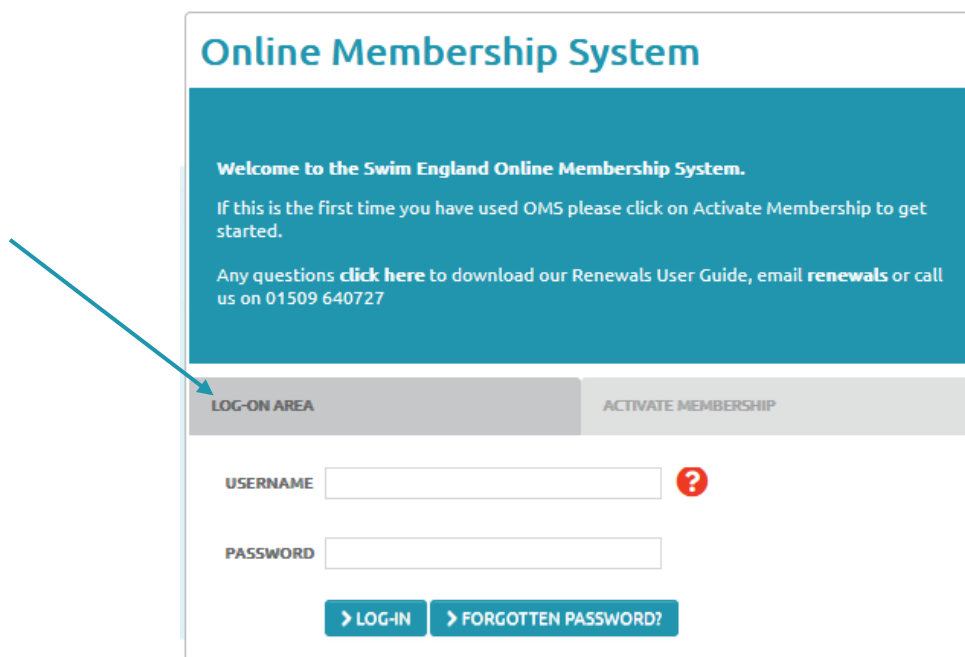
[swimschools@swimming.org](mailto:swimschools@swimming.org)

01509 640727

# Swim School OMS Summary Guide

## Logging In

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



You will need to enter your username (this will either be your ID 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 Swim School team and this OMS Summary Guide.

**PLEASE NOTE:**

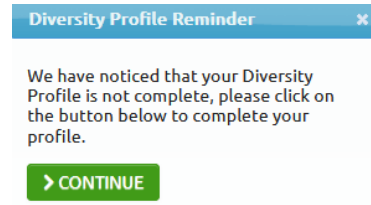
**If you are an Online Administrator or Deputy for your Swim School, you will be given the option to either “Login as a Swim School Online Administrator” or “Login as an individual”. If you are logging in as a Swim School Administrator, please see page 10 for further instructions.**

# Swim School OMS Summary Guide

## Logging in as Swim School Individual

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

If you haven't yet completed your Diversity Profile you will be prompted to complete this before moving on. See page 9 for further instructions



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

- Individual Detail
- Schools
- Amendments
- Data Protection Choices
- Diversity Profile

## Individual Detail

The Individual Detail tab will list your personal details.

**You are able to amend all the details listed on this page aside from your Individual Number and Sex, Name or DOB.**

To amend your Sex, you will need to contact the membership team ([swimschools@swimming.org](mailto:swimschools@swimming.org)) in order to get this processed.

To amend your Name and DOB please contact your Swim School you may have to provide proof of name change to your Swim School.

## Schools

The Schools tab will list the details of the Swim Schools you are registered

## Amendments

The amendments tab will display any amendments made by your Swim School or Club (past and present).

# Swim School OMS Summary Guide

## Data Protection Choices

The Data Protection Choices tab is where you are able to select and amend what information you would like to receive from Swim England and the Institute of Swimming.

## Diversity Profile

The Diversity Profile tab allow you to complete information that Swim England will use to identify 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 Profile does not update your Swim England record and as such, you will need to contact the membership team to get this formally amended.**

# Swim School OMS Summary Guide

## Logging in as Swim School Administrator

Once you have selected “**Login as Swim School Administrator**”, you will be taken to the Swim School home page which will look like the below:

The screenshot displays the Swim School OMS Summary Guide home page. At the top, there is a navigation bar with tabs for Home, Details, Staff, Batch Management, School Admin, Messages, and Change Login. Below this is a dark header area with the text "Online Management System" and a welcome message: "Welcome Back Joe to Martyns Test Swim School [1736699]". To the right of the header are links for "LOG-OUT" and "HELP", and the "TEST Swim England Swim School Member" logo. The main content area is divided into two columns. The left column is titled "SCHOOL SUMMARY" and contains sections for "Recent activity" (showing Joe Bloggs logged in on 07/11/2023), "Status" (with a notification that membership is due for renewal on 02/11/2024), "Administrators" (listing Joe Bloggs and Josephine Bloggs, with a "View administrators" link), and "Total Individuals" (7). The right column contains "OMS USERGUIDE", "MY MESSAGES", and "EXTERNAL LINKS" (listing British Swimming Website, Swim England Coronavirus Advice, www.swimming.org, and www.swimmingresults.org). At the bottom, there is a footer with social media icons, copyright information "© 2019 The ASA. All Rights Reserved", and the logo for "equate digital".

## Navigating Around OMS as an Online Administrator

### Swim School Home Page

Upon logging in to the Swim School’s account, you will automatically be taken to the Swim School’s Home Page which lists the **School Summary**. This section will detail any urgent notifications, recent activity, the date your swim school is due to renew a list of online administrators and a total count of individuals within the Swim School.

To the right of this section, there is a “**My Messages**” tab which will list the most recent messages specific to the Swim School. 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 your swim school.

# Swim School OMS Summary Guide

## Details

The Details tab lists the information specific to your swim school the following will be displayed on Poolfinder (<https://www.swimming.org/poolfinder/>), Swim School name, main email, main contact number and website address. This includes the Swim School name, the main email address, main contact number, website address, Facebook link, Instagram link, Twitter link, Companies House Number and Charity Number.

The Swim School name, the main email address, main contact number are required fields and will be populated from your membership information.

## Amending Details:

### Swim School Name & Website

- If you wish to amend the Swim School's name, please contact the Swim England membership team by email [Swimschools@swimming.org](mailto:Swimschools@swimming.org).
- To add/update the link to the Swim School's website, please copy the link into the box next to "**Website**". You may only add one website.

The screenshot shows the 'Details' tab in the Swim School OMS. At the top, there is a navigation bar with buttons for Home, Details, Membership, Batch Management, School Admin, Messages, and Change Login. Below this is a dark blue header for the 'Online Membership System' with a welcome message: 'Welcome Back Joe to Martyns Test Swim School [1736699]'. To the right of the header are 'LOG-OUT' and 'HELP' links, and the 'Swim England Swim School Member' logo. The main content area is titled 'CLUB DETAILS' and contains a form with the following fields:

Name	<input type="text" value="Martyns Test Swim School"/>	Facebook	<input type="text"/>
Main Email address	<input type="text" value="Somewhere@anywhere.com"/>	Instagram	<input type="text"/>
Main Contact number	<input type="text" value="01509 640700"/>	Twitter	<input type="text"/>
Website	<input type="text"/>	Companies House Number	<input type="text"/>
		Charity Number	<input type="text"/>

At the bottom of the form are two buttons: a green '> SAVE' button and a red '> CANCEL' button.

- To add/update the link to the Swim School's Facebook, Instagram or Twitter account, please copy the links into the box next to the relevant information.
- To add/update Swim School's Companies House number type this in to the box "**Companies House Number**"
- To add/update Swim School's charity number type this in to the box "**Charity Number**"

### PLEASE NOTE:

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

# Swim School OMS Summary Guide

## Staff

This section will outline how to search for and view all swim school staff, add new staff, make amendments to current staff and remove staff. This section is particularly important for the swim school's renewal.

Staff
Batch

Individual's

Add New individual

Lapsed Individual Finder


## Individuals

The first option under this tab is "Individuals". This will display all current swim school staff as illustrated below:

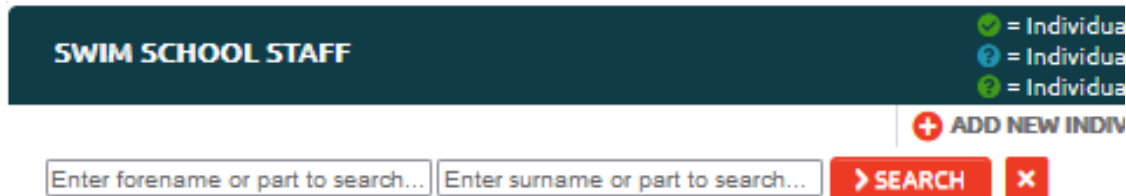
The top of this section provides a key to indicate the status of each individual's registration. The description for each status is detailed below:

= Individual subject to unsubmitted batch	<p>This individual's information has been amended/updated however the batch has not yet been submitted for processing.</p>
= Individual subject to unconfirmed amendment for another School	<p>This Individual belongs to another Swim School or club and their information is in the process of being amended/updated by them.</p>

# Swim School OMS Summary Guide

 = Individual subject to verification by the governing body	This indicates that Swim England are processing a submitted batch that included this individual.
--	--

You are able to search for individuals using the search function as illustrated below:



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

## Adding New Individuals

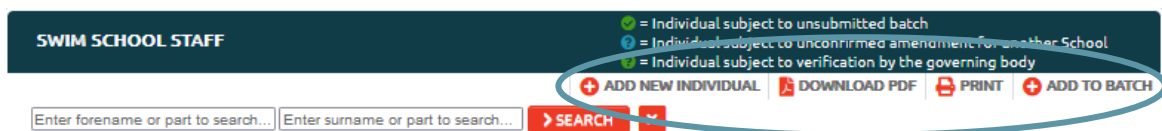
- To add new staff, please click “**Add New Individual**”
- Please see page 14 for detailed instructions on adding new staff

## Download PDF

- Selecting “**Download PDF**” will open a pdf document listing all your current staff, this will list their role within the swim school, DBS valid to date, Safeguarding valid to date and any teaching/coaching qualifications. . **This is the Swim School Personnel Report which will need uploading to the Swim School Portal.**

## Print

- Selecting “**Print**” will open a new web page to allow you to print a full list of all swim school staff as displayed on the School Staff page

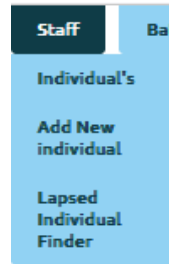


- You will also be able to save a PDF version of this list if required using the “**Print**” function by amending the print destination to “**Save as PDF**”

# Swim School OMS Summary Guide

## Add New Individual

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

A screenshot of the 'ADD NEW INDIVIDUAL' form. The form is titled 'ADD NEW INDIVIDUAL' and contains several input fields: 'Individual Number (if known)', 'Title' (dropdown), 'First Name', 'Initial', 'Last Name', 'Known As', 'Date of Birth' (calendar), 'Postcode', 'Address' (multiple lines), 'Town', 'County', 'Home Telephone', 'Work Telephone', 'Mobile Telephone', 'Home Email', 'Work Email', 'Sex' (dropdown), and 'Join Date' (calendar). There are checkboxes next to the telephone and email fields. A 'LOOK UP ADDRESS' button is located below the postcode field. A 'Mandatory Fields' section is on the right, with a 'Role' dropdown. A 'Swim England privacy policy' box is also present. At the bottom right, there are 'SAVE' and 'CANCEL' buttons.

- If you are aware of a current or previous Swim England membership number, please enter this in the relevant field (this will enable the membership team to link the correct record to the correct individual if they are a current or past member of Swim England)

Please ensure you are inputting the correct information for the Individual however if you are struggling please contact the membership team who will be able to assist ([swimschools@swimming.org](mailto:swimschools@swimming.org))

### PLEASE NOTE:

**Please ensure you tick the box next to the phone number and email address as this is what Swim England will use to contact the individual and what the Individual will need to login to their own account. 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 under the Swim England privacy policy. This will add this Individual to a new or existing batch (if not yet submitted). For more information on batch management, please see page 16.

# Swim School OMS Summary Guide

## Cannot Add individual:

If there is an individual in a batch with similar or identical details to the individual you are

**ADD NEW INDIVIDUAL**

!

Current batch details:

Batch	Membership No.	Name	Date of Birth	Postcode	Category
173669900123	-1	Joe Bloggs	23/01/1997 00:00:00	LE11 3TY	

**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.**

> SAVECANCEL

trying to add, you will be presented with the below message:

If you are adding a genuine new individual 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 individuals to the same batch.

If you add them as a duplicate by mistake and need to remove them, please see page 16 for further details.

## Lapse Individual Finder

If you need to search for and/or re-add a lapsed individual to the swim school, you are able to do this via the Lapse Individual Finder.

### PLEASE NOTE:

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

**MEMBER FINDER**

Membership No.:       Firstname:       > SEARCH ✕

Lastname:       Date of Birth:

Membership No.	First Name	Last Name	Date of Birth	Source	Details
1567439	Josephine	Bloggs	01/01/1963	Core	<span style="background-color: #F44336; color: white; padding: 2px 5px; border-radius: 3px;">&gt;</span>

To re-add this Individual, you will need to select the arrow underneath **"Details"**.

14 | Page

# Swim School OMS Summary Guide

This will open up the individual details page on the “**Action**” section select “**Amend**” and then Save

This will automatically add this previously lapsed individual to a batch.

If you need to make any amendments to a lapsed individual please add the individual to your batch and make changes within the pre-submission tab from your Batch Management tab.

## Batch Management

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

BATCH HISTORY			
Batches For Year			
All <input type="button" value="SEARCH"/> <input type="button" value="X"/>			
Batch No.	Date Submitted	Member Summary	Status
<a href="#">173669900123</a>	03/11/2023 (added) (Joe Bloggs)	PreSubmission: 1	Pre-Submission

<b>Batch No.</b>	Each time a batch is created, a new batch number is generated. Please quote this number when contacting Swim England with batch queries.
<b>Date Submitted</b>	States the date and time a batch was last amended/updated.
<b>Member Summary</b>	Number of individuals in the batch
<b>Status</b>	This will display either pre-submission, match members, admin amendments, or complete.  Match Members/Admin Amendments – are batches currently being processed by the membership team

# Swim School OMS Summary Guide

## Removing/Amending Individuals in Batch Management

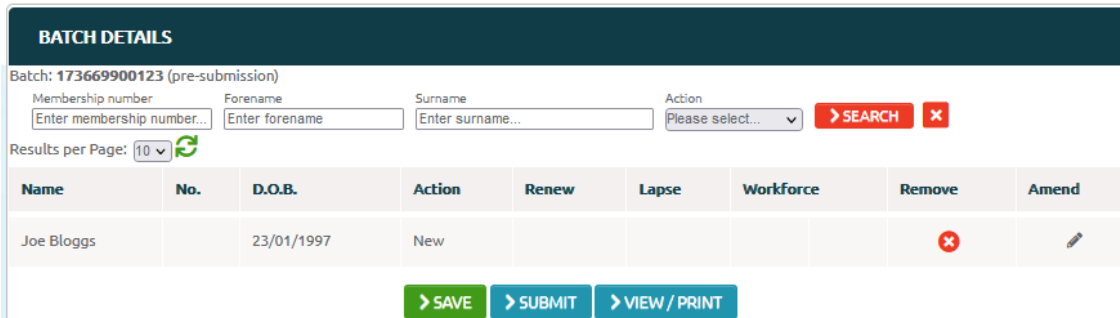
- Click in the Batch Number, this will open the batch so you can view the individuals within the batch
- To remove an individual from a batch, please select the red **X** within the “Remove” column
- To amend an individual within a batch, please select the pencil button within the “Amend” column to make any necessary amendments before submitting the batch

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

- If you have submitted the batch and need to remove or amend an individual, please contact the membership team with the batch reference number and relevant amendments – [swimschools@swimming.org](mailto:swimschools@swimming.org)

## Submitting a Batch

To submit a batch click in the Batch Number, this will open the batch so you can view the individuals within the batch. Click on the “**Submit**” button.



**BATCH DETAILS**

Batch: 173669900123 (pre-submission)

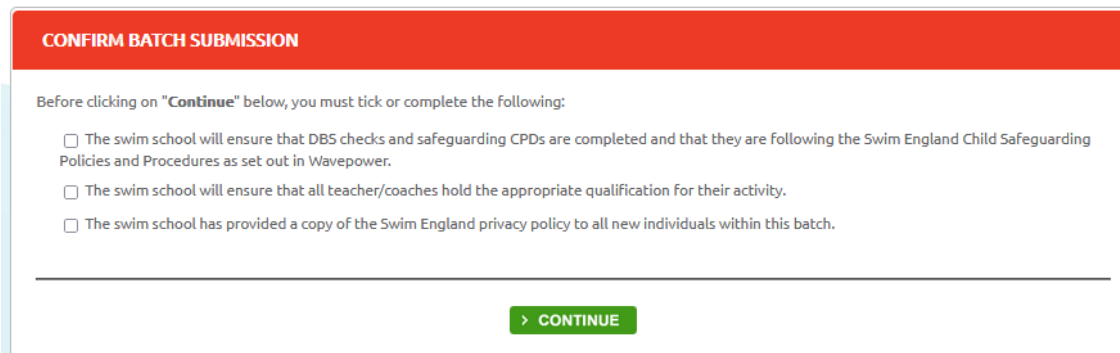
Membership number: [Enter membership number...] Forename: [Enter forename] Surname: [Enter surname...] Action: [Please select...]

Results per Page: 10

Name	No.	D.O.B.	Action	Renew	Lapse	Workforce	Remove	Amend
Joe Bloggs		23/01/1997	New				X	

> SAVE > SUBMIT > VIEW / PRINT

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 swim school will ensure that DBS checks and safeguarding CPDs are completed and that they are following the Swim England Child Safeguarding Policies and Procedures as set out in Wavepower.
- The swim school will ensure that all teacher/coaches hold the appropriate qualification for their activity.
- The swim school has provided a copy of the Swim England privacy policy to all new individuals within this batch.

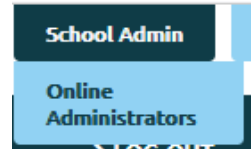
> CONTINUE

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

**Please Note: Your first batch must include your Welfare Officer details, Your Welfare Officer must be an individual who solely does this role. If a Welfare Officer isn't selected you will not be able to submit the batch.**

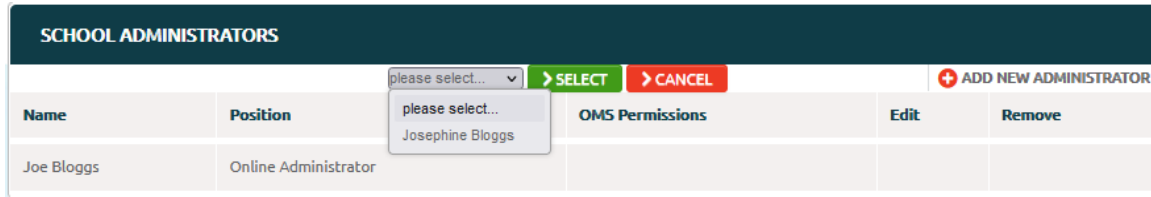
# Swim School OMS Summary Guide

## School Admin



The School admin tab allows the main online administrator to set up four additional deputies to access the Online Management System. You can only add an individual that is listed on your Swim School Staff list as a deputy, you will need to register these individuals prior to adding them.

To add a new online administrator click on “Add New Administrator” a drop down box will appear, select an individual from the list and then select the permissions you wish them to have.



**PLEASE NOTE: the swim school 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, Swim England will set up your main online administrator if you need to amend this please email [swimschools@swimming.org](mailto:swimschools@swimming.org). If the swim school needs to add a new deputy but there is already the maximum four additional administrators, one of the existing deputies will need removing.**

## Messages

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

## Change Login

This tab will allow you to switch from the Swim School’s account to your personal account.