User Guide to online Club Affiliation and the Governance & Compliance Portal

https://www.swimmark.org/Account/LogOn

Contents

The purpose of evidence submitted by clubs is to demonstrate that the club has met the Club Affiliation criteria showing that the highest standards of safe and effective practice have been put in place. All information provided will be handled in line with Swim England data protection guidelines. For the purposes of club Affiliation this means information will remain confidential and will be viewed only by Swim England Club Development Officers/Regional Officers with access to Club Affiliation online, or club members' allocated "club" or "club admin" roles.

Any queries regarding the Club Affiliation site please direct to **clubdevelopment@swimming.org**

Queries relating to Club Affiliation criteria and evidence should be directed to your Club Development Officer/Regional Officer in the first instance.

Operating System Requirements

Club Affiliation uses the online Governance and Compliance (formerly SwimMark) portal which runs using java script, you will need to enable this before you have full functionality of the site (this is usually automatically enabled through most internet browsers). Mac users may find problems with running the portal in safari, downloading Google Chrome or Mozilla Firefox will resolve this issue. Windows users may find some functionality is not compatible with versions of Internet Explorer before version 10, in this instance run Google Chrome or Mozilla Firefox.
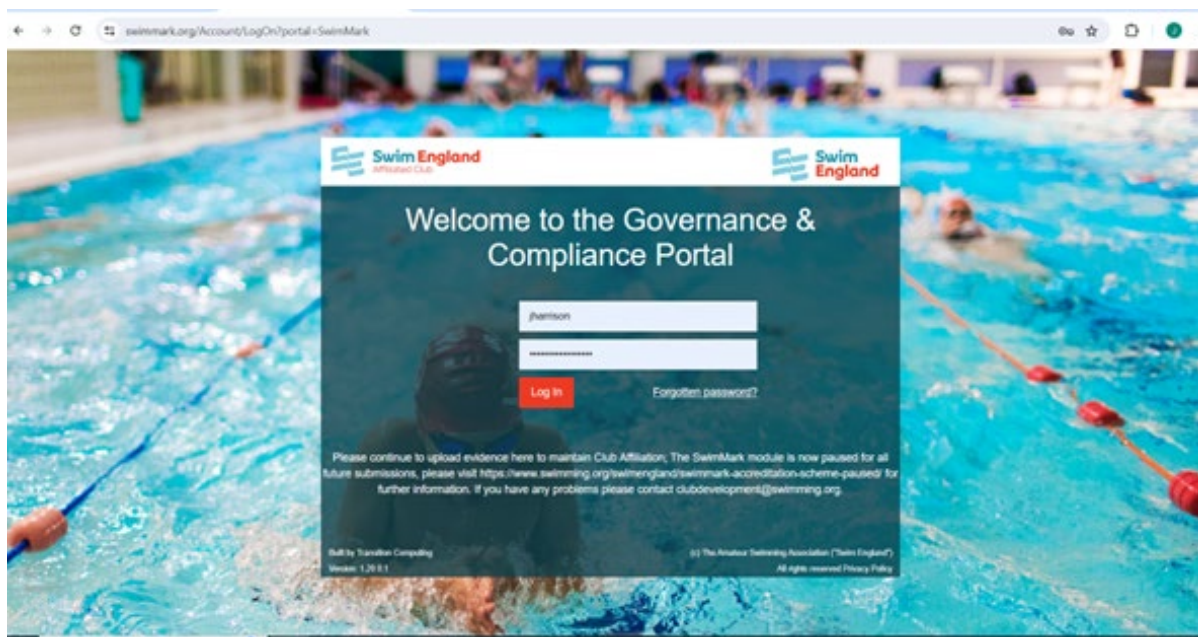
Assistance with running java script on windows computers can be found here http://support.microsoft.com/gp/howtoscript.

Logging in for the First Time

Please follow the link https://www.swimmark.org/Account/LogOn to access the login page.

Username: Is your Swim England individual membership number
Password: Password1 (on your first login (case sensitive))

- When logging onto the portal for the first time, you will be asked to change your password - please choose something memorable, you will also need to include both a capital letter and number in your new password.
- In the event that you are unable to remember your password, once it has been updated, click the forgotten password box on the front screen, and an email will be sent to you with a temporary password; if this fails contact clubdevelopment@swimming.org
- Once you have successfully logged in, you will see the screen below, showing the Club Affiliation and SwimMark Essential Accreditations. The SwimMark module is no longer available for uploads but clubs who have previously gained this accreditation can still access any previous documents by selecting the module and viewing previous submissions. Club Affiliation is now the only module that clubs should be completing. If

you are a school or university club you will see that there is also a specific titled module for you.
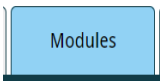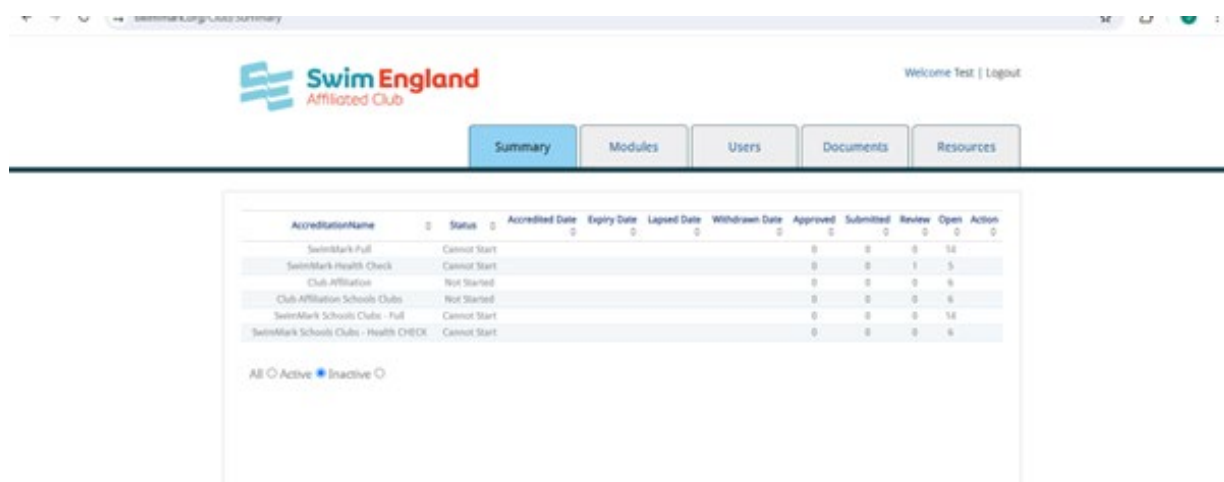

Overview

The 5 tabs you can see hold the following information:

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Summary	This tab shows your current status as a Club Affiliation club. You will also be able to see the number of elements submitted, under review or approved.
Modules	This tab will show the new 5 elements to upload evidence against. Element documents can be downloaded, amended and re-uploaded as well as having access to the templates.
Users	This tab shows all members of your club, and allows you to edit their details. You can also use the refresh button from here.
Documents	This tab allows you to store any files you wish to save.
Resources	This tab holds a library of useful information to help you with your accreditation.

Getting Started

1. To view all Club Affiliation criteria, click on [Modules] tab, this will turn blue once highlighted.
2. The screen below will appear.
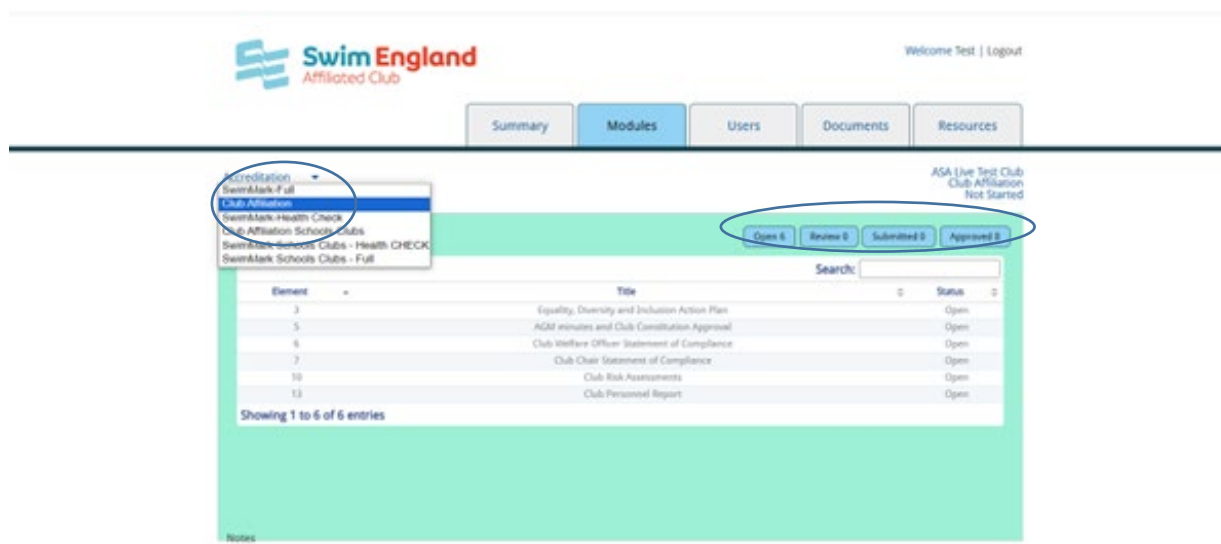
1. The accreditation box circled shows the different modules. If you were a previous SwimMark club you can still select this to view previous accreditation periods and submitted evidence should you wish to download this.
2. The information boxes circled on the right gives an overview of the status of submitted evidence.
   - **Open** – no evidence has been uploaded
   - **Review** – evidence has been submitted by the club, Swim England officer has requested the evidence to be reviewed by the club i.e. changes are required
   - **Submitted** – Evidence submitted for accreditation, awaiting approval from Swim England Officer.
   - **Approved** – Evidence which has been approved by Swim England officer.

To view the elements for Club Affiliation select the drop down box and choose the accreditation you wish to view.
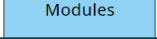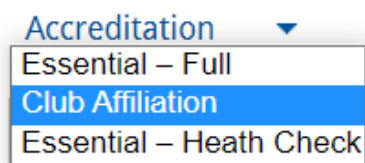

Until you have gone through the process once you will only see one option in the Elements drop down box. This will say 'in progress' or 'not started'
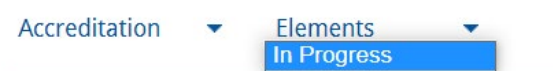
    In progress – the current working submission

Uploading Evidence

1. Click on the [Modules] tab.
2. The list of elements will appear.
3. Click anywhere on the line of the element you wish to view; this will open the element.
4. As shown below the options provided are:
   - **Download** – this allows you to download a piece of evidence from the last accreditation in order to amend it and re-upload.
   - **View** – view a document which you have saved/submitted against the element.
   - **Upload** – attach evidence to the element.
   - **Template** – shows templates and guidance provided by Swim England to assist you with your accreditation; however, you are not obliged to use these.


To upload evidence, select the upload button in the question wizard and then the documents screen will appear as shown below. Once you click upload it will invite you to browse for files from your PC.
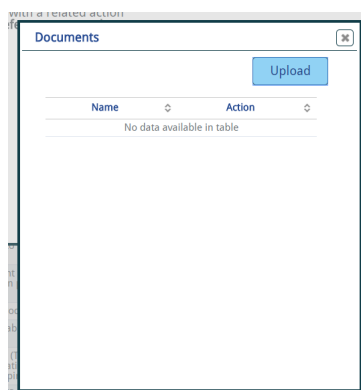
When uploading evidence, you can select most file types such as word, excel, pdf etc.
A pale orange box will provide a percentage complete for upload and show you it is in progress. Once completed the box will list the file name. You are able to upload as many documents as necessary; however, these must not exceed 15MB in size. To view the size of the file right click on the document on your computer and it will advise the size prior to upload.

If your file is too big, you will get a notification box to advise the document you are trying to upload is too large (see below).
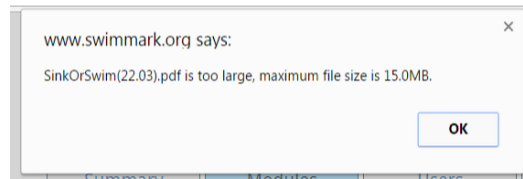
Once the file is showing you need to close the box to come out of it leaving the screen below showing; select submit and then exit the box.


The "Your Comment" box is available for you to send a brief comment to the Swim England Officer, regarding the specific evidence you have uploaded. Please use the format: a comment (maximum length 2 lines), current date, followed by your name.

> *Example: Your Comment/Your Name/01/01/22*

Upload Errors

Should you upload a document in error or wish to change content once it has been uploaded, you can delete any document you have uploaded by simply selecting upload on the Question Wizard and then delete. If you have already submitted the document, you will need to contact your Club Development Officer and ask them to put the element back to 'review' in order for the document to be deleted.
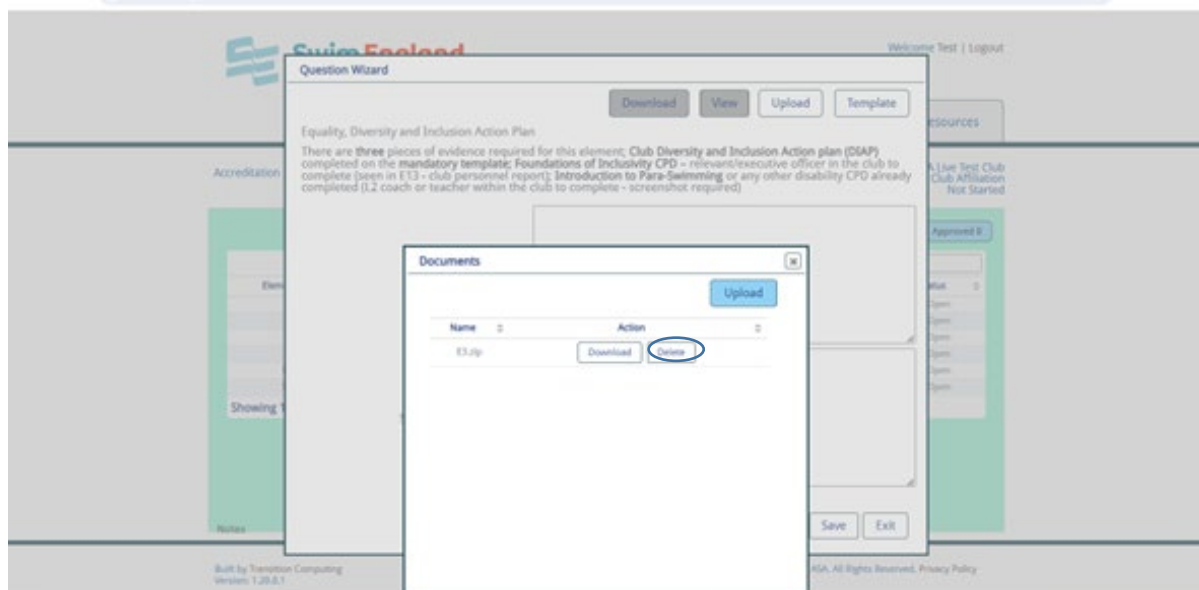
However, the following rules apply.

- Changes cannot be made to documents direct from the upload screen; to do this use the "download" button from the Question Wizard. The site holds a copy of the document with the main document being located on your computer.

Approval of Evidence

An allocated Club Development Officer/Regional Officer will be responsible for approving the evidence uploaded for Club Affiliation; the time this takes may vary dependent on how many clubs are submitting evidence at any one time. **For renewals, evidence should be uploaded no more than 3 months prior to the renewal date.** You will be contacted via email when your renewal is due. For new accreditations clubs are advised to communicate with their relevant Club Officer.

1. Approved – this confirms that the evidence uploaded has been approved for the Club Affiliation elements.
2. Review – this advises that the evidence needs review. The Swim England officer will provide a brief reason using the Swim England comments box or alternatively call/email to discuss what changes/improvements are required.

When all 6 elements are approved by the Swim England Officer these will show as approved with a green tick when you look at the overview.

Retaining Affiliation

Your club is required to submit evidence each year to retain Club Affiliation (regardless of whether evidence is being re-used). This will be 12 months from approval and your Club Development officer will make contact as a reminder to start thinking about renewing your evidence. Approvals will be directed to the nearest quarter for ratification which is January, April, July and October every year.

In the 2nd year you will start the process again; click on the Element drop down arrow and you will notice that 2 entries are now showing both the previous year submission and 'not started', select this and you will notice all elements are now shown as open
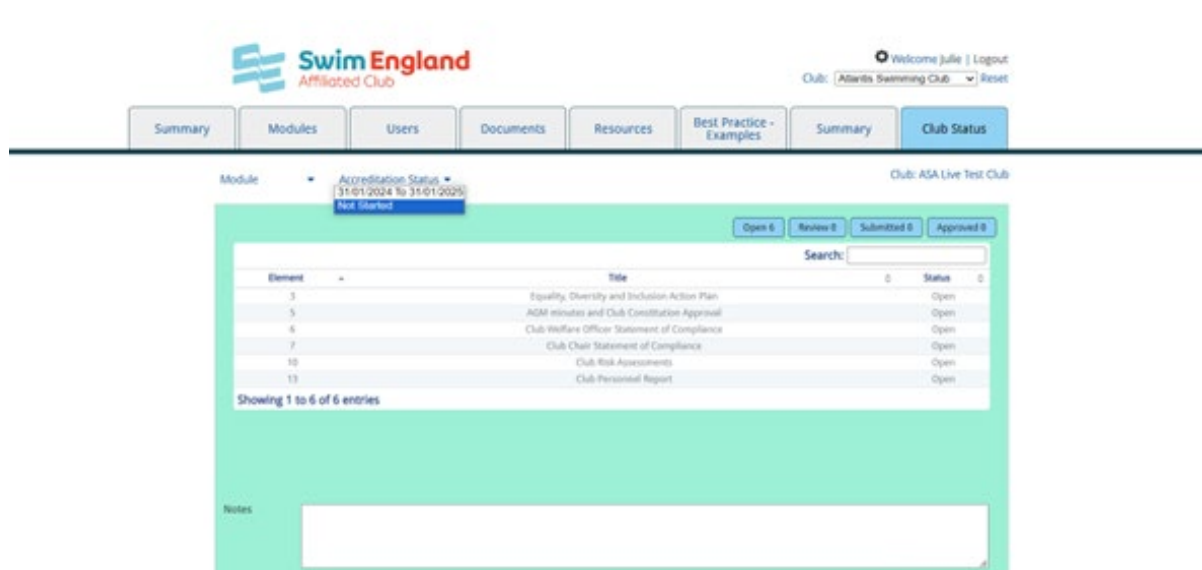
1. You can upload evidence to the' not started' accreditation 3 months before the due date, which will then be reviewed and approved by the Swim England Officers. If there is a problem with the evidence the officer will set it to review and include a comment in the box to advise what is required.
2. If you wish to reuse a document from your previous submission please select the download button - this will allow you to download, amend as necessary and re-upload. If you wish to simply amend the existing document select the download button which will allow you to download, amend and then re-upload.

In order to add users please follow the instructions below:

1. Click on the **Users** tab.

2. Click the **Edit** button next to the members name you wish to add as a Club Admin or Club user i.e. those individuals who will have responsibility for uploading Club Affiliation evidence etc (names and ID have been blocked out for data protection purposes in the diagram below) The list always defaults to active users so make sure you scroll to the bottom and select 'All' to obtain a complete list of members available.
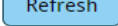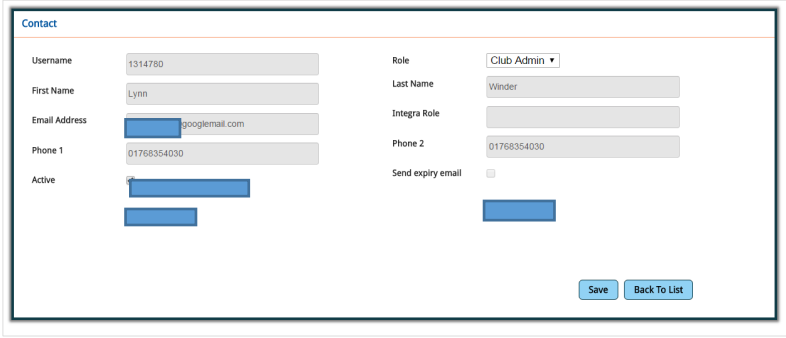
3. If all the members in your club are not displayed on the screen, please make sure you have selected 'All' at the bottom of the page as this will show all members that are both active and inactive; if they are still not showing click the **Refresh** button, which will update the list. **Please be aware this process may take several minutes**. Only those registered with Swim England Memberships will be included. Once you click on the edit button the following screen will appear. If they are still not showing please contact clubdevelopment@swimming.org

4. In the box labelled role select 'club admin' or 'club' from the drop down option. Club admin provides editing rights, or club provides a read only option for the user.
5. Tick the box labelled active.
6. Click 'save' and then 'back to list'.
7. The portal will automatically generate the member a login using their Swim England membership number and a password of Password1 which needs to be changed during initial login (portal will prompt the individual to change the password)
   NB. Swim England will not provide access to the site unless the allocated club admin personnel are experiencing problems. For security purposes the club must ensure that they are responsible for providing editing/read only rights to relevant personnel.

FAQ's

Q1) Do we have to register on the Governance & Compliance Portal?

Each club secretary can access the site using their Swim England affiliation number, alongside the default password (Password1) which should be changed to something memorable. All affiliated clubs are listed on the portal.

Q2) I can't remember my password, what do I do?

Please select the "forgotten password" button on the front screen and if this fails contact clubdevelopment@swimming.org.

Q3) What types of files can I upload?

The portal will accept standard Microsoft formats such as word and excel as well as picture files such as gif and jpeg. If you have the ability to PDF documents, it would be useful to keep your club user area storage to a minimum.

Q4) I am having issues uploading evidence?

All main file types are accepted on the portal. Please check that the document does not exceed 15MB as this will issue an error message due to the document being too large.

Q5) Can only one person access the portal?

You can have as many people as you wish have access to the Club Affiliation content for your club. This means it can be a shared role and not the commitment of just one person. They will need to be members of the club and registered with Swim England via the Online Membership system.

Q6) We have a new volunteer who we would like to give access but they aren't a Swim England member, what do they do?

You will need to register the person via the Swim England Online Membership System as we have designed the portal to directly "talk" to this Swim England system, which collates your club information to avoid you having to duplicate updates and keep the data current.

Q7) I have submitted a piece of evidence but I'm unable to view it?

You may have clicked save instead of submit, please click submit and the information should appear.

Q8) I am having problems accessing the site, what should I do?

Please contact clubdevelopment@swimming.org for assistance with the site

Q9) Is the portal compatible on MAC, iPad etc?

Yes, the site has been tested across windows and Mac applications, however when using a Mac please ensure that you have the capacity to view Office document which can normally be done using Preview.

Q10) I am having problems viewing the Governance & Compliance portal (I am using Internet Explorer)

The site has been robustly tested across all web browsers; however there are many different versions of Internet Explorer and users may have issues reading all the script. Google Chrome and Firefox seem to function better so try to download these and see whether it helps.