













Secretaries Portal User Guide

v1.0



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Version History

Version	Updated by	Date	Comments
1.0	R While	16/10/2015	Initial version

Introduction

The Secretaries Portal has been created to aid a club in managing its members, club membership fees and England Athletics affiliation.

This guide has been created to help both new, and existing, users of the Secretaries Portal understand the features offered and use the portal to its fullest potential.



Club Profile

The Club Profile section gives you an overview of your club showing the affiliation status of your club and the number of members.

Club Profile

The Club Profile section allows you to view the following information:

Name – The name of the Club

Reference – Unique reference number assigned to the club

Area – The England Athletics area the Club is assigned to

Affiliation – Current England Athletics Affiliation of the Club

Clubmark – Clubmark status

Voting Quota – Number of votes, between 1 and 5, assigned to the club based on the number of registered athletes

Disciplines – Disciplines the club competes in

You can also edit the club image. To Change the club image:

1. In the Club Profile section, click the 'Edit Image' link
2. Click the 'Browse...' button and choose a file from your local computer
3. Click the 'Save' button

My Club

The My Club section allows you to view and edit the following information:

Club Secretary and Membership Secretary – You can see the name(s) of the Secretary, or Secretaries if there are more than one. You can change a Secretary to another member of your Club or resign a Secretary.

To resign a Secretary:

1. Click on the name of the Secretary you wish to resign

Note - You can only resign a Secretary when there is more than one Club Secretary or more than one Membership Secretary.
2. Click the orange 'Resign' button
3. Confirm the resignation

To change a Secretary:

1. Click on the name of the Secretary you wish to resign
2. Click the 'Change' button
3. Search for a member of your club who you wish to make Secretary
4. Click the Save button

Primary Venue – This displays the Primary venue for your club. The Primary and Secondary venues can be edited from this screen.

To edit the Primary or Secondary venue:

1. Click the 'Edit' button to the right of Primary Venue
2. Click the 'Edit' button next to either Primary Venue or Secondary Venue, depending on which one you want to edit
3. Enter the new address by using the postcode lookup tool or manually entering the address
4. Click the Save button

Training times – The times your club meets for training

To edit the Training Times

1. Click the 'Edit' button to the right of Training Times
2. Enter the new times in the text box
3. Click the Save button

Website – The website of your club.

To edit the website address:

1. Click the 'Edit' button to the right of Website
2. Enter the new website address in the text box
3. Click the Save button

Contact Preferences – Choose to share your information to receive promotions

To edit Contact Preferences:

1. Click on 'Update' to the right of Contact Preferences
2. Tick or untick the check box for if you wish to receive promotions
3. Click Save

Census – Details about the number of members at your Club. This enables England Athletics to monitor participation levels in the sport.

To update the Club Census:

1. Click on 'Update' to the right of Census
2. Complete the Census by entering the required values in the boxes
3. Click the Save button

Membership Summary

A brief overview of the number of members at your clubs and their roles.



Pay Club Membership

The Pay Club Membership section allows you to manage and keep track of your clubs annual subscriptions.

You can add your own Membership Types and assign different users to different Membership Types, which can include the England Athletics registration fee.

The club can use this section to use the Online Member Payment facilities. Any Membership Type which includes the registration fee which is then paid by the member using the Online Membership Payment feature, will register the member automatically without needing to make a separate payment to England Athletics and moneys will be sent directly into the Clubs Bank Account and England Athletics Bank Account.

Alternatively, if the club wish to record Club Membership payments which have paid the club. The club then will bank any monies and then arrange any England Athletics registration fees to be sent in.

Searching Membership Payments

You can find club members by using the search bar, or you can further filter the list by using the Payment Status dropdown menu. The menu contains 4 Options:


All – All members of your club

Outstanding – Members that have not paid their Membership Fee and are not on a proposed payment

Proposed – Members that have been selected and are in your basket ready to be marked as paid or marked ready to request Online Membership Payment

Paid – Members marked as Membership Fee paid

Changing Membership Type

You can change the Membership Type of a member by clicking the green pencil icon  then selecting the new Membership Type from the dropdown list. Once have selected the Membership Type you wish to assign click the 'OK' button. A new Membership Type can be created from the Settings menu

Sending an Online Membership Payment Request

A Membership Fee can be paid by the member using the Online Membership Payment.


If a members annual club membership does not have a status of either 'Paid' or 'Requested' and they have a valid email address, a payment request can be sent. To do this:

1. Tick the 'Pay checkbox of the member(s) you want to send a request to
2. Click the 'Request Payment' button
3. Check the names of the member(s) which will be sent payment requests then click 'Send Payment Requests'

More details about Membership Fees can be found in the Online Membership Payment part of the guide.

Mark member as Paid or request payment

Select the checkbox in the 'Pay' column of the table to select the member you wish to mark as Paid or request payment from.

Note: If no membership Type has been select the member will have a warning icon  in the Pay column where the checkbox should be.

Once you have selected the members, they will appear in the basket which can be seen in the top right of the screen. You can clear all payments by clicking the 'Clear Proposed Payments' button.

You can then click either the 'Mark as Paid' button to record their payment (this does not affiliate them to England Athletics) or 'Request Payment' to request an Online Membership Payment.



Pay England Athletics

The Pay England Athletics section allows you to manage the England Athletics affiliation status of your Club and its members. You can also resign an athlete from your club on the page.

Searching Registration Payments

You can find club members by using the search bar, or you can further filter the list by using the Payment Status dropdown menu. The menu contains 4 Options:

- All – All members of your club
- Outstanding – England Athletics registration has not been paid yet
- Paid to Club – If a member has a Membership Type that includes the England Athletics registration fee and the Membership Payment has been marked as paid then the status will show that the member has paid their registration fee to the club
- Proposed – Members that have been selected and are in your basket ready for an order to be created
- Payment Sent – The order which a member is due to be paid by cheque or BACS transfer, but the payment has not yet been received
- Paid – Registration fee has been paid for the member

Paying the Registration Fee (Member and Club)

Tick the box in the Pay column for the member you wish to pay for, or tick the 'Pay Club Affiliation Fee' box at the bottom of the page. Members with a Payment Status of 'Paid', 'Payment Sent' or 'Paid to Club' have the tick box greyed out and cannot be selected.


Any member with a status of 'Paid to Club' will automatically be included in the next order raised.

Once you have selected the members you wish to pay for, click the 'Pay Online' button. You can now either continue to pay the order by credit/debit card or generate an invoice to pay by cheque or BACS transfer.

Online payment will register members as soon as the payment process has been completed.

Cheque and BACS transfer require additional time for payment to be received and processed.

Resigning an athlete

You can resign an athlete from a club by clicking the 'Resign Athlete' button  by their name.



Order History

Here you can view all orders generated by the club. You can check the status of orders, view details, pay for them online or cancel an order.

Search Orders

You can search by the Reference Number of an order by using the Search Bar above the Order table.

Orders Table

Reference Number – Automatically generated Reference Number for the order

Date Generated – The date the order was created

Status – An order which England Athletics have received payment for will have a status of 'Paid'. Any order for which payment has not been received will have a status of 'Pending'

Total Amount – Total of the order


Details – View the contents of the order

Remittance – view and print the Remittance Advice for the order

Online Payment – Click here to pay for the order online

Pay/Cancel/Resend Online Payment

By clicking on 'Pay/Cancel' in the 'Online Payment' column you can cancel the online payment request, resend the request, pay the request from the Secretaries Portal or enter a manual payment. If you enter a manual payment, and the order contains England Athletics registration fees, they will have to be paid manually to England Athletics.



Requested Payment Details

Date Payment Requested: 25 Sep 2015
Invoice Reference: 29305-PayZip

Cancel Invoice


Resend Payment Request

Pay Online

Manual Payment

Close

Cancel an Order

To cancel an order click the 'Cancel Order' button  in the same row as the order you want to cancel. Then click 'Yes' to confirm the action or 'No' to go back to the previous page without any changes.



All Members

Here you can view all members of a club and edit a members roles.






Search Members

You can find club members by using the Search Bar above the Members table.

Members Table

URN – England Athletics reference number

First Name / Last Name – Name of the member


Roles – Shows the roles the member holds at the club. These are Athlete , Coach , Official , and Volunteer . The roles assigned to a member can be changed by using the Edit icon .

DOB – Date Of Birth of the member

Email – Primary email address of the member

Phone – Default phone number of the member

Editing a role

Click the Edit icon  then in the Edit Roles screen, select or deselect which roles you wish to assign to or remove from the member. Click save when you have finished.



Athletes

Here you can manage the athletes registered to your club.


Athletes Filters

Athlete – Here you have 4 options:

All (Not Lapsed) – All active athletes at the club

Competitive – All competitive athletes at the club

Non Competitive – All Social Athletes at the club

Lapsed – All inactive, or lapsed members of a club. If an athlete does appear in the Registration Payments, Membership Payments or All members sections of the Portal then you can reactivate them from this page. Click on the Edit icon  and change 'Is an athlete?' to 'Yes' and choose to make the athlete either 'Competitive' or 'Non Competitive' then click the save button. The athlete will now appear on other parts of the portal.

Claim – Filter First Claim and Second Claim athletes




Age Group – Filter by age of athletes

Gender – Filter male or female athletes

Other – Filter Foreign or Higher Competition athletes

Or you can search by name by clicking 'Show Search' and using the search box.

Other Actions

To edit an athlete's role, click the edit icon  then click 'Save' once changes have been made. To resign an athlete from the club, click the resign athlete icon  then 'Yes' to confirm the action. To view any notes on the athlete click the notes icon .



Coaches

Here you can manage the athletes registered to your club.

Coaches Filters



Search – Search for a coach by name

Level – Filter to coaches of a certain level

Qualification – Show coaches who have achieved a particular qualification

Location – Choose a coach who resides in a particular county.

Other Actions

To resign a coach from the club, click the resign athlete icon  then 'Yes' to confirm the action. To view any notes on the athlete click the notes icon .



Officials

Here you can manage the athletes registered to your club.

Officials Filters


Search – Search for an official by name

Level – Filter to officials of a certain level

Qualification – Show officials who have achieved a particular qualification

Location – Choose an official who resides in a particular county.

Other Actions

To resign an official from the club, click the resign an official icon  then 'Yes' to confirm the action.

To view any notes on the athlete click the notes icon  .



Volunteers




Here you can manage the athletes registered to your club.

Volunteers Filters

Search – Search for a volunteer by name

Role – Filter to volunteers of a certain role








Other Actions

To edit a volunteer's role, click the edit icon  then click 'Save' once changes have been made. To resign a volunteer from the club, click the resign athlete icon  then 'Yes' to confirm the action. To view any notes on the athlete click the notes icon .

Groups

The 'Groups' feature of the Secretaries Portal is designed to allow club officials to place Club members into groups for easier administration, or to quickly email, export details or add notes to a specific, predetermined group of people.

The ability to add a group is available from the following Portal sections

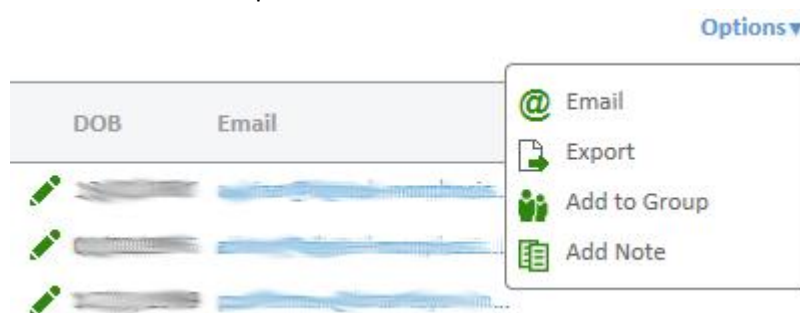
-  Membership Payments
-  Registration Payments
-  All Members
-  Athletes
-  Coaches
-  Officials
-  Volunteers

Creating and Editing Groups

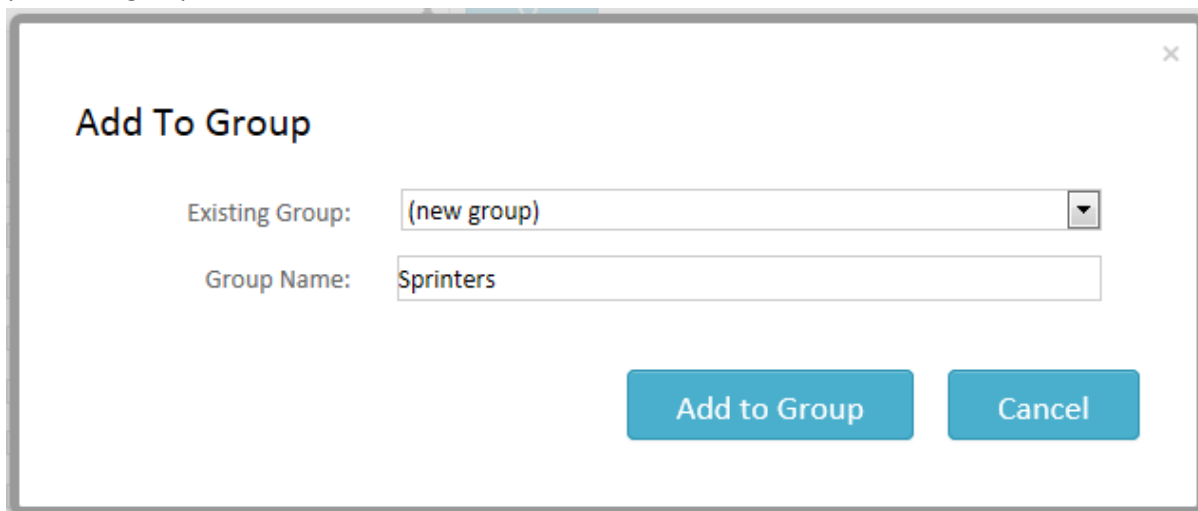
Creating Groups

To create a group:

1. Select the people you want to be included in the new group by placing a tick the check box next to their URN. You can select people on multiple pages where the list of people spans over multiple pages.
2. On the right-hand side of the screen, above the column headers, click the 'Options' then choose 'Add to Group'



- On the 'Add To Group' screen, select 'Existing Group' as '(new group)' then type the name of your new group.

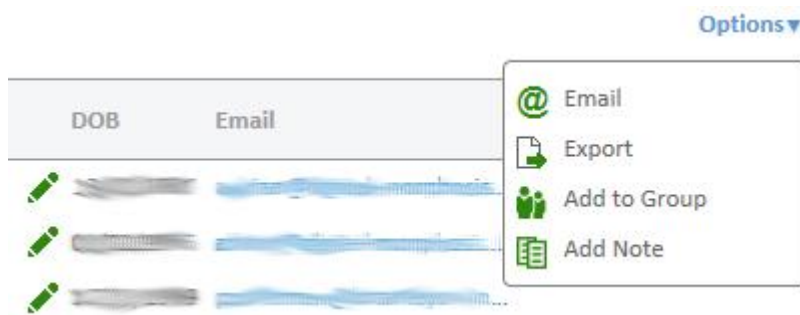


- The people selected are now members of the group.

Adding to a Group

Adding to a group:

- Select the people you want to be included in the new group by placing a tick the check box next to their URN. You can select people on multiple pages where the list of people spans over multiple pages.
- On the right-hand side of the screen, above the column headers, click the 'Options' then choose 'Add to Group'



- On the 'Add To Group' screen, change 'Existing Group' to the name of the group you want to add the selected people to

Add To Group

Existing Group:

Sprinters

Group Name:

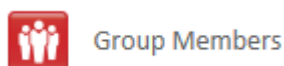
Add to Group

Cancel

- The people selected are now members of the group.

Removing Members and Deleting Groups

- Click on the 'Group Members' option on the left-hand menu.



- On the 'Group Members' page, choose the group from which you wish to remove a member from the drop down list.

Group Members

Below are the members currently added to groups in the system.

Search


×

🔍

Group

Sprinters

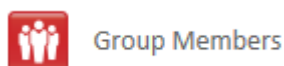
	URN	First name	Last name	DOB

- Click the 'Remove from Group' icon  next to the name of the member you wish to remove.
- To delete a Group, remove all members from the Group.

Using Groups

Using Groups:

- Click on the 'Group Members' option on the left-hand menu.



- On the 'Group Members' page, choose the group you wish to use from the drop down list. You can also search for and select individuals with a group.

Group Members

Below are the members currently added to groups in the system.

✕
Q

Group

Sprinters ▼

<input type="checkbox"/>	URN ▼	First name	Last name ▲	DOB
--------------------------	-------	------------	-------------	-----

- You can now select individual members of the group, or select every member of the group (leaving all check boxes unticked will also select all members) then click the options button.
- A box with option will now appear. From here you can choose to Email all members in the group (or only the ones you have selected), export details, Add members to another group (Or create a new group) or add a note to the members.



Settings

Here you can add and edit Membership Fees, choose your membership year type.

To manage Club memberships, ensure the 'Manage my Club memberships' box is ticked.

Add a new Membership Fee

Click Add Membership Fee then enter the name of the Fee, amount and whether the England Athletics Registration Fee is included then click 'Save'.

Edit/Delete a Membership Fee

Click on Edit by the Membership Fee to be edited or deleted then click on Delete to remove the Membership Fee or make any required changes and click Save.


Online Membership Payments

Online Membership Payments enable Clubs to manage their own membership payments and allow their club members to make online payment.

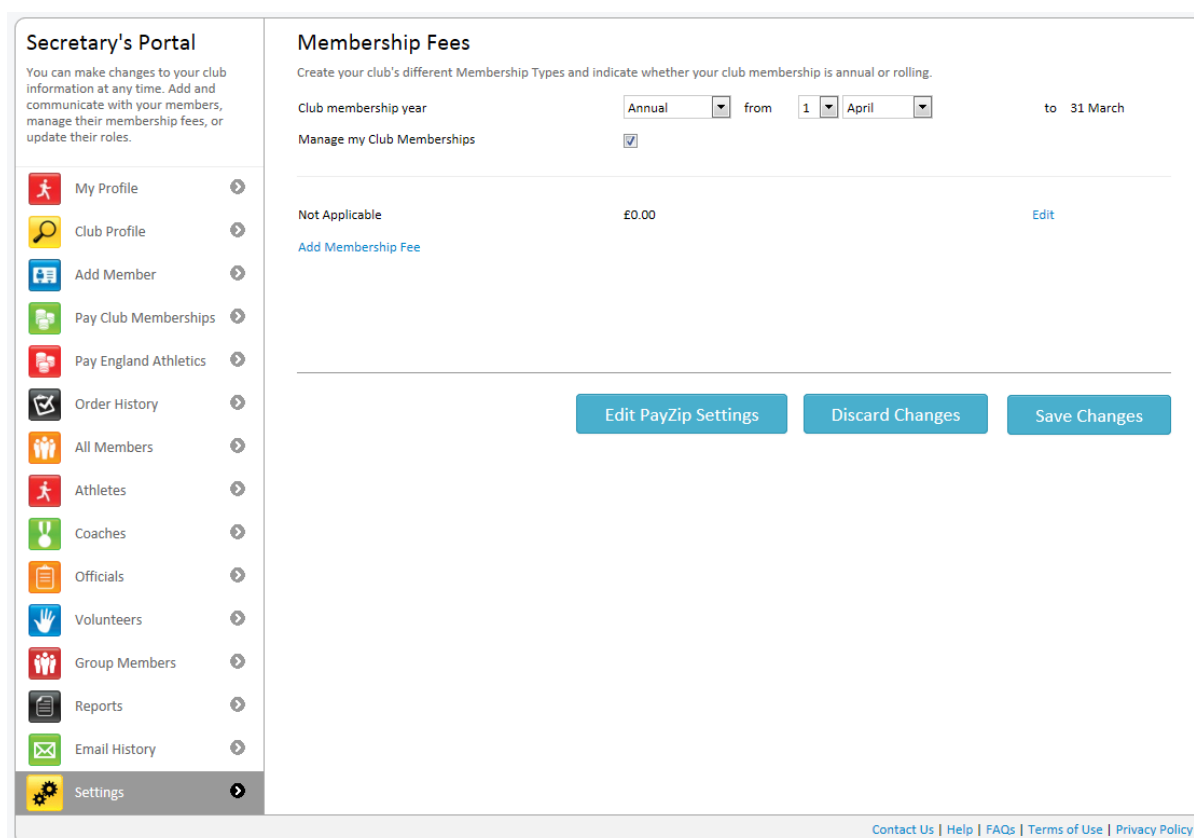
Once the online payment process has been completed, funds from the athlete's payment are automatically transferred to the club's bank account. If the club has included the England Athletics registration fee in their membership, the registration fee will be automatically paid to England Athletics and the member will be registered to compete.

England Athletics have negotiated an online payment fee of 2.25% of the total amount plus 25p per transaction. The club can decide if they pass this charge onto the member or if they absorb this charge in the club membership fee.

Setup Online membership Payments

In  Settings, ensure the 'Manage my Club Memberships' box is ticked.

Click the 'Edit PayZip Settings' button



Secretary's Portal
You can make changes to your club information at any time. Add and communicate with your members, manage their membership fees, or update their roles.

- My Profile
- Club Profile
- Add Member
- Pay Club Memberships
- Pay England Athletics
- Order History
- All Members
- Athletes
- Coaches
- Officials
- Volunteers
- Group Members
- Reports
- Email History
- Settings**

Membership Fees
Create your club's different Membership Types and indicate whether your club membership is annual or rolling.

Club membership year: Annual from 1 April to 31 March

Manage my Club Memberships ☒

Membership Type	Fee	Action
Not Applicable	£0.00	Edit
Add Membership Fee		

[Edit PayZip Settings](#) [Discard Changes](#) [Save Changes](#)

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To pass the PayZip fees on to the member, check the 'Member pays PayZip fees' checkbox. To absorb the fees in the cost of the membership, uncheck the box.

Click on 'Create Organisation in PayZip'

Secretary's Portal

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PayZip Settings

Alter the settings related to the integration with the PayZip online payments system.

Member pays PayZip fees ☒

PayZip Organisation Id [Create Organisation in PayZip](#)

[Return to Settings](#)
[Discard Changes](#)
[Save Changes](#)

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Enter details

Secretary's Portal

You can make changes to your club information at any time. Add and communicate with your members, manage their membership fees, or update their roles.

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- Officials
- Volunteers
- Group Members
- Reports
- Email History
- Settings

Create Organisation in PayZip

The details below will be used to create your organisation in PayZip. Please make any adjustments you feel are required and click 'Create'.

First Name

Last Name

Email

[Create](#)

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Click 'Setup Banking Details' and follow the process

Secretary's Portal

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- Group Members
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- Email History
- Settings

PayZip Settings

Alter the settings related to the integration with the PayZip online payments system.

Member pays PayZip fees ☒

PayZip Organisation Id

[Set up Banking Details](#)

If you wish to change the details of the user associated with your invoicing, please contact PayZip at help@payzip.co.uk.

[Return to Settings](#)
[Discard Changes](#)
[Save Changes](#)

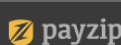
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- Email History
- Settings

Bank Details



Enter Bank Details

Please enter the bank details for your club below. Make sure you enter them correctly, as you will need to contact us to make any changes.

We will use these details to pay you weekly when your members make online payments.

Account Name

Account Number
















Sort Code

[Save Bank Details](#)

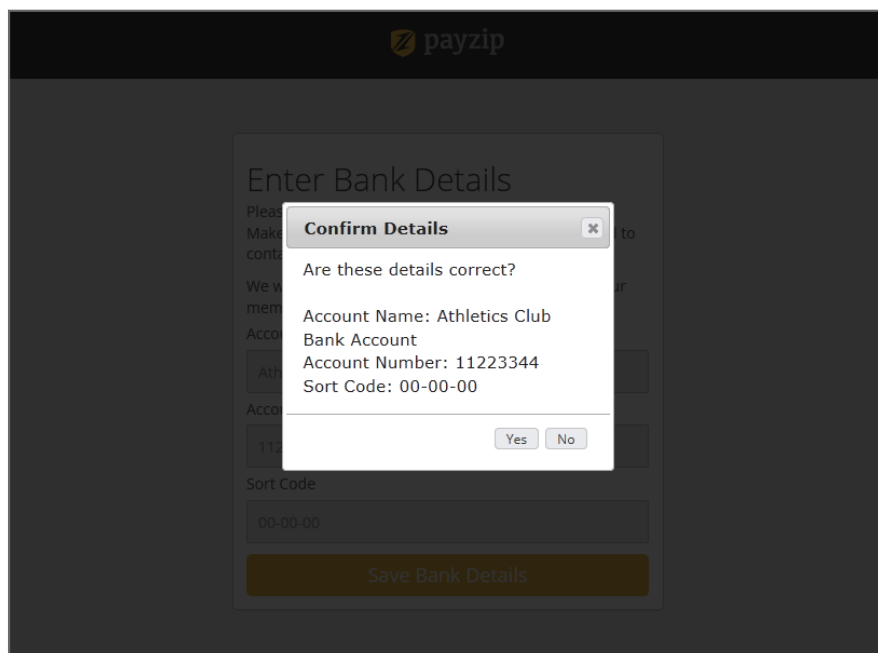
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Secretary's Portal

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-  Volunteers >
-  Group Members >
-  Reports >
-  Email History >
-  Settings >

Bank Details



The screenshot shows the 'Enter Bank Details' form on the payzip website. A modal window titled 'Confirm Details' is overlaid on the form, asking 'Are these details correct?'. The modal displays the following information:
















- Account Name: Athletics Club
- Bank Account
- Account Number: 11223344
- Sort Code: 00-00-00

At the bottom of the modal are 'Yes' and 'No' buttons. The background form has fields for Account Name, Account Number, and Sort Code, with a 'Save Bank Details' button at the bottom.

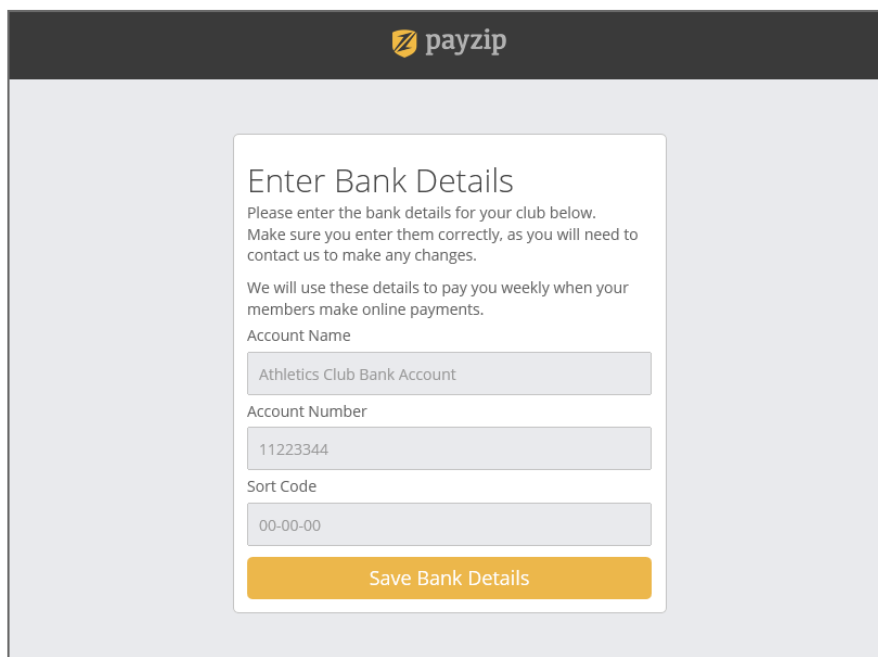
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Secretary's Portal

You can make changes to your club information at any time. Add and communicate with your members, manage their membership fees, or update their roles.

-  My Profile >
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-  Email History >
-  Settings >

Bank Details

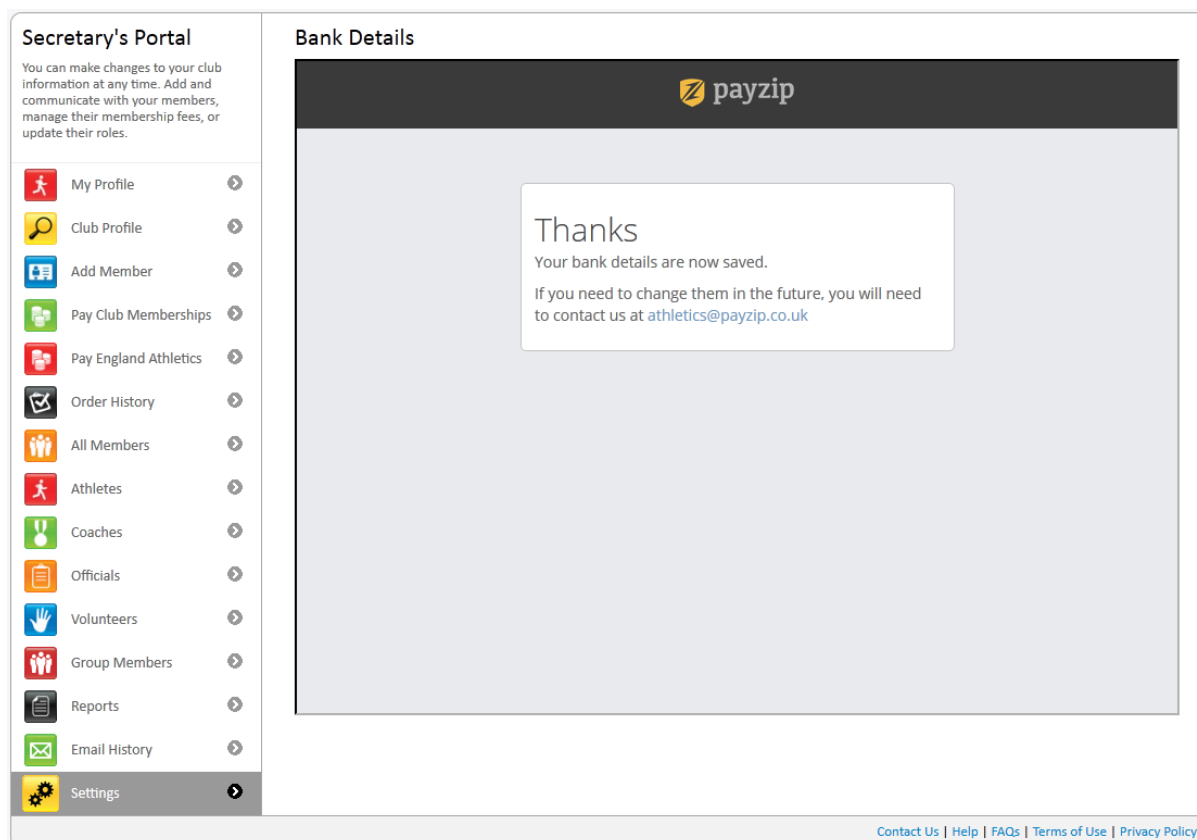


The screenshot shows the 'Enter Bank Details' form on the payzip website. The form includes the following fields and instructions:

- Account Name:** Athletics Club Bank Account
- Account Number:** 11223344
- Sort Code:** 00-00-00


Below the fields is a yellow 'Save Bank Details' button. The form also contains introductory text: 'Please enter the bank details for your club below. Make sure you enter them correctly, as you will need to contact us to make any changes. We will use these details to pay you weekly when your members make online payments.'

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The Club is now setup to request online membership Payments from its members.

Setup Membership Fees

In  Settings, click Add Membership Fee then enter the name of the Fee, amount and whether the England Athletics Registration Fee is included then click 'Save'.

Edit/Delete a Membership Fee

In  Settings, click on Edit by the Membership Fee to be edited or deleted then click on Delete to remove the Membership Fee or make any required changes and click Save.

? FAQ

Q. How do I set up Membership Types for my club?

A. Click on “Settings” on the left menu.

Click on “Add Membership Fee”.

Enter the name of the club membership and price remembering not to include the £.

The “Includes Fee” tick box indicates the entered membership fee plus the England Athletics Registration fee.

Click “Save Changes”.

The new Membership Type will now appear in the “Membership Type” dropdown on the “Add Member” screen.

Q. How do I add Membership Types to new members?

A. From the “Add Member” screen select the appropriate Membership Type from the “Membership Type” dropdown. See “How do I set up Membership Types for my club?” for more information on setting up your membership fees.

Q. How do I change a Club/Membership Secretary?

A. Click on “Club Profile” on the left menu.

In the “My Club” section, click on the name of the Club/Membership Secretary you wish to change, then click the “Change” button. You can now search for any member of your club wish to replace the existing secretary with. When you have selected the new secretary, click the “Save” button.

Q. What if I have forgotten my Username?

A. You will be asked to provide your DOB, First Name and Last Name. If your details are unique, you will be prompted with your security question.

If you answer your security question correctly, you will be presented with your username. If not you will be asked to contact Membership Services

Q. How do I add membership types to existing members?

A. Click on “Membership Payments” on the left menu.

Search for the required member and click the “Green Pencil” (Change Membership Type)

Select the required “Membership type” and “Amount” and click “OK”. See ‘How do I set up Membership Types for my club?’ for more information on setting up your membership fees.

Q. How do I indicate a club membership fee as paid?

A. You can indicate your club membership fee as paid by clicking “Membership Payments” on the left menu.

Tick the “Pay” check box next to the member(s) you wish to indicate as “Paid” and click “Mark as Paid”

Enter a Payment Method and Reference and change the Date Paid as required.

For multiple members you can click the “Cog” icon next to Payment Method, Date Paid or Reference to update all with a single value.

See “How do I set up Membership Types for my club?” for more information on setting up your membership fees.

Q. How can I pay England Athletics the athlete Registration Fee?

A. You can pay an athletes “Registration Fee” to England Athletics by clicking “Pay England Athletics” on the left menu.

Tick the “Pay” check box next to the Athlete(s) you wish to register and the time you click “Pay Online” the fee will be added. If you have ticked the “Pay Club Affiliation Fee” check box fee will also be added. See “How can I pay England Athletics the club affiliation fee?” for more information.

Once generated you can then pay online or click ‘Click here to generate an invoice instead’ “View” or “Print” an order.

Please do not send cash through the post. Cheques should be made payable to “England Athletics” and returned with this remittance advice to:

England Athletics Affiliation
Athletics House
Alexander Stadium
Walsall Road
Birmingham
West Midlands
B42 2BE

Please remember to write the Order Reference Number on the back of the cheque.

Q. How can I pay England Athletics the club affiliation fee?

A. You can pay the club affiliation fee to England Athletics by clicking “Registration Payments” on the left menu.

Tick the “Pay Club Affiliation Fee” check box and the next time you click “Pay by Invoice” the fee will be added. If you have ticked the “Pay” check box next to any Athlete(s) these fees will also be added. See “How can I pay England Athletics the athlete registration fee?” for more information

Once generated you can then pay online or click ‘Click here to generate an invoice instead’ “View” or “Print” an order.

Please do not send cash through the post. Cheques should be made payable to “England Athletics” and returned with this remittance advice to:

England Athletics Affiliation
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Alexander Stadium
Walsall Road
Birmingham
West Midlands
B42 2BE

Please remember to write the Order Reference Number on the back of the cheque.

Q. Can I export information about my members’ club fee payments?

A. You can export all or selected payment information by clicking “Membership Payments” on the left menu and then click on “Options”(top right) and select “Export”.

You can search for individual members or filter by “Payment Status” selecting multiple members by ticking the check box on the left side of each member.

To export all members, do not select any members and click on “Options”(top right) and select “Export”.

Q. What if I have forgotten my Password?

A. You will be asked to provide your username or email address.

If found an email will be sent to the registered email address with information on how to reset your password.

Q. Where can I register to access this system?

A. You will need to be a Club Secretary registered within the England Athletics systems. If not please contact Membership Services.

Q. How can I add a member?

A. You can add a member by clicking “Add Member” on the left menu.

You will need to provide Title, First Name, Last Name and Date of Birth. The system will automatically check whether you can add that person as rules exist to protect the member from being duplicated.

You may use the address lookup to speed up address entry by entering a House Number and Post Code and clicking on “Find Address”. If you wish to add the address manually, click “Cannot find Address”.

Although Email Address and Phone Number are not essential, their inclusion will allow you to email the members from within your portal.

“Membership Type” allows you to select one of the various Memberships your club offers.

New Membership Types can be added by clicking on “Settings” then “Add Membership Fee”. See “How do I set up my clubs Membership Types?” for more information.

In the “Athlete Registration” dropdown you will need to indicate whether you wish to register the member as a Competitive Athlete, Non Competitive Athlete or not an Athlete.

Any further roles a member may perform at your club can be added from “Volunteer Role(s)”.

The Date of Election is set to today’s date, but can be changed as needed.

If you are adding an under 11 member you will be prompted to provide the name of a parent / guardian, their email address and confirmation of consent.

Once created, the system will show a “Success” message and present you with the registration number for the member.

Q. How can I indicate my Club Membership fee is paid?

A. You can pay your club membership fee by clicking “Pay Club Memberships” on the left menu.

Tick the “Pay” check box next to the members(s) you wish to indicate as “Paid” and click “Mark as Paid”

Enter a Payment Method and Reference and change the Date Paid as required.

Clicking a “Cog” next to Payment Method, Date Paid or Reference will let you update all items with a single value.

See “How do I set up Membership Types for my club?” for more information on setting up your membership fees.

Q. Where can I view my Orders and Payments?

A. Your order and payment history can be accessed by clicking on “Order History” on the left menu.

You can search for an “Order” using the search tool. By default “Order History” is displayed with the most recent “Order” at the top. To change the order in which the “Order History” is displayed, click the “Date Generated” column heading.

You can “View” the details of any of your “Orders” as well as reprint a remittance.

If you have any problems with an order, please contact Membership Services

Q. Can I send emails to my club members?

A. You can send emails to club members with a valid email address from “All Members”, “Athletes”, “Coaches”, “Officials” or “Volunteers” sections.

You can either click on the members email address or you can select multiple members by ticking the check box on the left side of each member. All members in a section can be selected or deselected by ticking the check box on the left side of the grey title bar.

You can send an email to selected members by clicking on “Options”(top right) and selecting “Email”.

From the “Send Email” screen, you can see the number of people you will be sending the email to.

A copy of the email will be sent to the sender’s email address.

Q. What can I change about my Club?

A. You can change your “Club Secretary” and “Membership Secretary” by clicking “Club Profile” on the left menu and clicking on the member’s name in the “My Club” section.

If your club has multiple club or membership secretaries you will have the option to “Resign” anyone of them if they no longer perform the role.

You can set your “Primary Venue”, “Training Times” and club website by clicking on edit next to that item.

“Contact Preferences” and “Census” can be updated by clicking on edit next to them.

Q. Why does the Census update panel keep bothering me?

A. To enable England Athletics to monitor participation levels across the sport, and assist in our reporting to Sport England and UK Sport, you are required to submit accurate census information regularly. The system registers when this is last updated and requires you to reconfirm this at specific intervals.

Q. What if the Membership Summary info is incorrect?

A. It means that the system has not yet been given all the information about your

“Athletes”, “Coaches”, “Officials” and “Volunteers”. These numbers relate to the people you can see in each section and the “Membership Summary” found in “Club Profile”

Q. How do I find a member at my club?

A. Click on “All Members” on the left menu, then type part of the member’s name in the search box and click the magnifying glass.

You will then be presented with individuals matching that information.

For a more specific search you can click on “Athletes”, “Coaches”, “Officials” or “Volunteers” from the menu.

Q. How do I update what a member does at my club?

A. Click on “All Members” on the left menu to show you all members registered in your club.

You can see what roles they have via the icons representing, “Athletes”, “Coaches”, “Officials” and “Volunteers”.

You can change the roles a person has by clicking on the “Edit Member Role(s)” pencil on the right of the “Roles” column.

From here you can change your member's Athlete Registration between "Competitive", "Non Competitive" or "Not an Athlete" and you can choose from a series of other roles.

Choosing other roles for the member will cause them to appear in the relevant section i.e. "Athletes", "Coaches", "Officials" or "Volunteers"

Q. Why are Coaching, Officials and Volunteers separated into different sections?

A. Each of these sections allows you to administer people with these roles easily.

Enabling role specific filtering for each of these roles on "All Members" would make it too difficult to use for many users.

More role specific information can be provided for people in specific groups. E.g. "Qualifications and Licensed status for Coaches and Officials".

Q. How do I set up Membership Types for my club?

A. Click on "Settings" on the left menu.

Confirm if your club runs its membership annually from a specific date, e.g. Jan to Dec, or April to March.

Next click on "Add Membership Fee".

Type in the name of the first membership fee type, specify the price of the membership without including the £ but you can include .00 e.g. 50.00 or 35.50

The tick box indicates if the fee paid to the club already includes the England Athletics Registration fee. This makes it easier to administer this part of forwarding on the fees to England Athletics.

Next hit Save.

The new Membership type now shows on the screen.

It is important to hit Save Changes at the bottom of the screen otherwise it does not save your changes.

The membership type will then appear in the dropdown on the Add Member screen.

Q. Can I export information about my club?

A. You can export all or selected member information by clicking on "Options"(top right) and selecting "Export".

Multiple members can be selected by ticking the check box on the left side of each member.

To export all members simply do not select any members