

PELHAM Training

How to Update Coach/Volunteer Roles and Qualifications

Coach Roles and Qualification updates

Coach / Volunteer

- Recap – coach/volunteer roles
- Add a new Coach / update
- Add Qualifications
- Add CPD
- Deactivate in case of error
- Coach Directory

Coach Roles - Recap

Coach Types: All are categorised as one of two types:

- Active
- Expired

This determines whether or not the coach can currently be used.

Active coaches must have both of the following certifications in place and up-to-date:

- Disclosure check
- Safeguarding certificate

Active coaches may be used by branches and centres (subject to the restrictions below).

Expired coaches are defined as any coach who is missing either a disclosure check or safeguarding certificate. Expired coaches should not be used until their certifications have been updated.

Accredited coaches must also satisfy all of the criteria below:

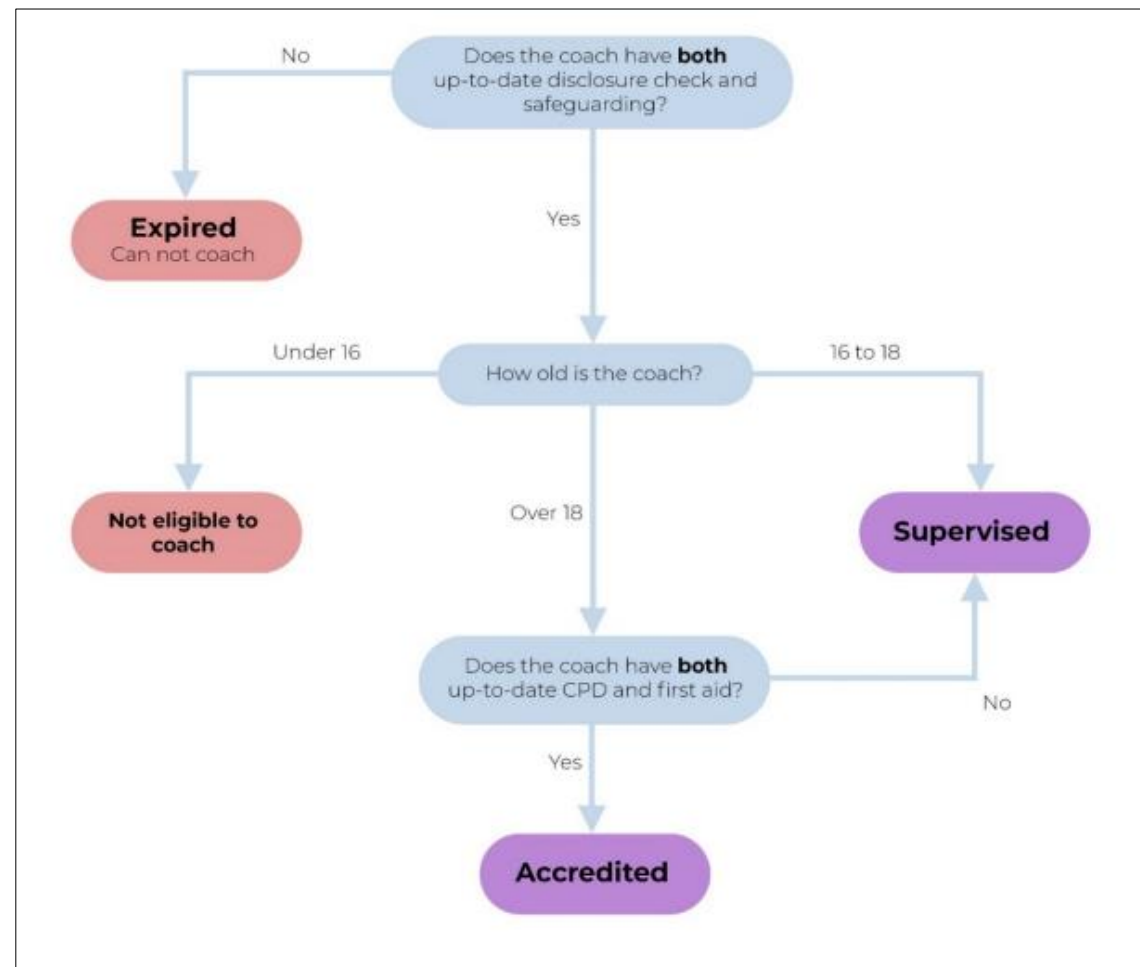
- Aged 18+
- Has up-to-date Pony Club CPD
- Has up-to-date First Aid certificate

Accredited coaches may coach unsupervised, and may also supervise other coaches.

Supervised coaches must also satisfy all of the criteria below:

- Aged 16+

Supervised coaches must be in the presence of an accredited coach at all times.



Add new contacts, for coaches or volunteers not already on PELHAM

- If the person already exists on Pelham either as a parent, member or Branch official, please follow the instructions on “how to add a new role”.
- If they do NOT exist on Pelham you will need to create their personal contact record first.

How to add a New Contact

You have permissions to add a new contact record (person) in the system if they do not already exist. Examples would be new coaches, volunteers or committee members (if not already on as parents)

There are 2 ways to find the Add Contacts screen.

Either from the Branch summary screen, +New Contact on Right:

Members Coaches & Volunteers Achievement History Financial Admin (Branch) General Notes Financial Related

📅 Current Members 244

Last updated: 12/05/2021 00:06

Current Branch Members (Subgrid) ▾

[Click Here](#)

+ New Contact

OR from the Contacts menu in the Navigation menu,
Click +New in the top menu

Branch App

← Show Chart + New Refresh 🔍

Current Branch Members (Branch) ▾

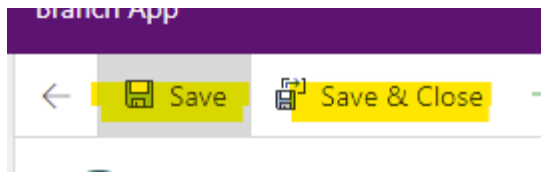
✓ Pony Club Num... ▾ First N... ↑ ▾ Last N...

[click for New Contact](#)

Add new contact

This will open the standard contact summary page.

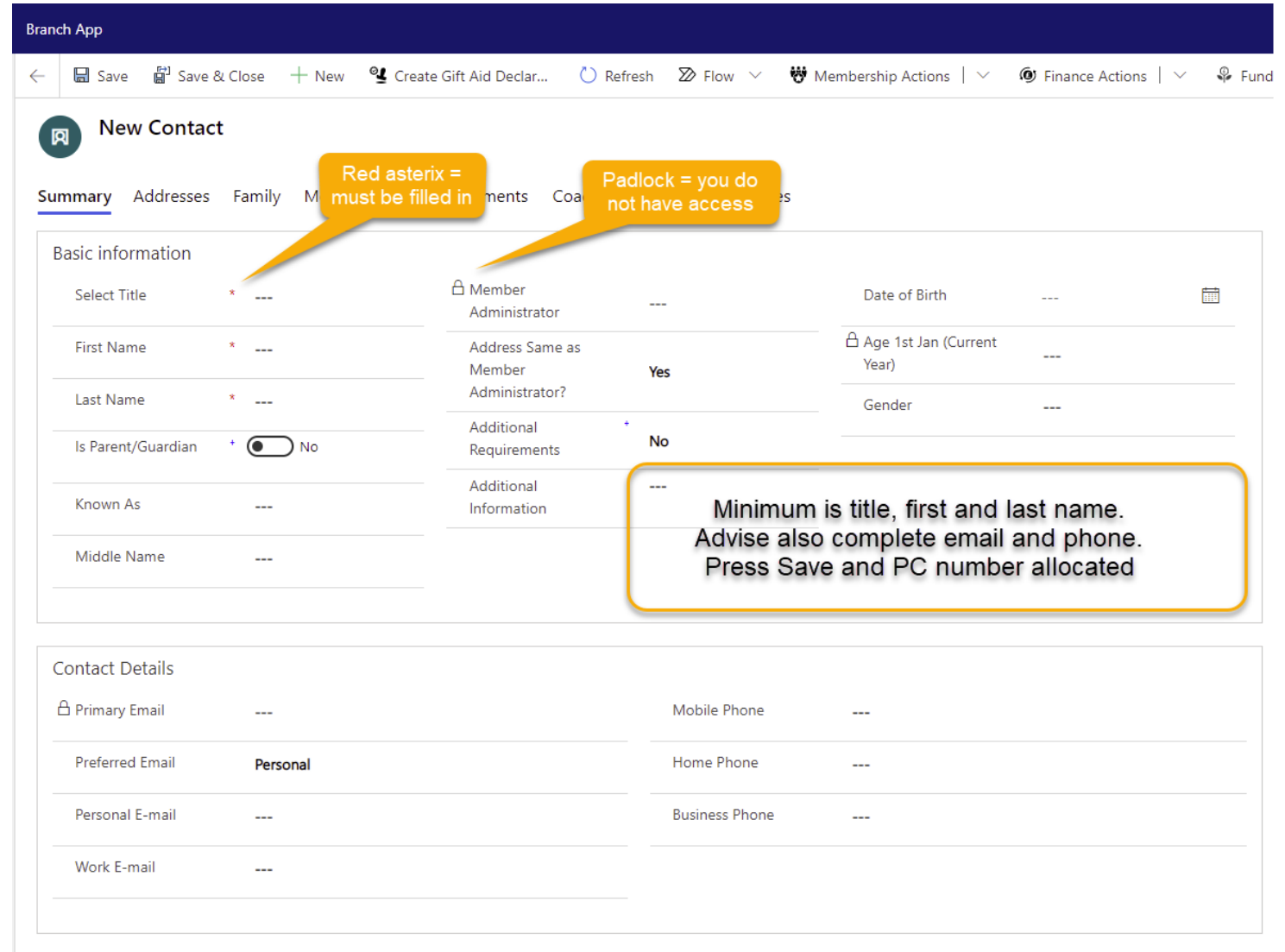
Complete required details and press Save.



A Pony Club number will be assigned and you can then add Address if required.

1003286
Pony Club Number

NB: you do not need to do this for new members that is all done by the membership team at Central Office.



Branch App

Save Save & Close + New Create Gift Aid Declar... Refresh Flow Membership Actions Finance Actions Fund

New Contact

Summary Addresses Family M Red asterix = must be filled in Padlock = you do not have access

Basic information

| | | | | | |
|--------------------|-----------------------------|---------------------------------------|-----|----------------------------|-----|
| Select Title * | --- | Member Administrator | --- | Date of Birth | --- |
| First Name * | --- | Address Same as Member Administrator? | Yes | Age 1st Jan (Current Year) | --- |
| Last Name * | --- | Additional Requirements | No | Gender | --- |
| Is Parent/Guardian | <input type="checkbox"/> No | Additional Information | --- | | |
| Known As | --- | | | | |
| Middle Name | --- | | | | |

Contact Details

| | | | |
|-----------------|----------|----------------|-----|
| Primary Email | --- | Mobile Phone | --- |
| Preferred Email | Personal | Home Phone | --- |
| Personal E-mail | --- | Business Phone | --- |
| Work E-mail | --- | | |

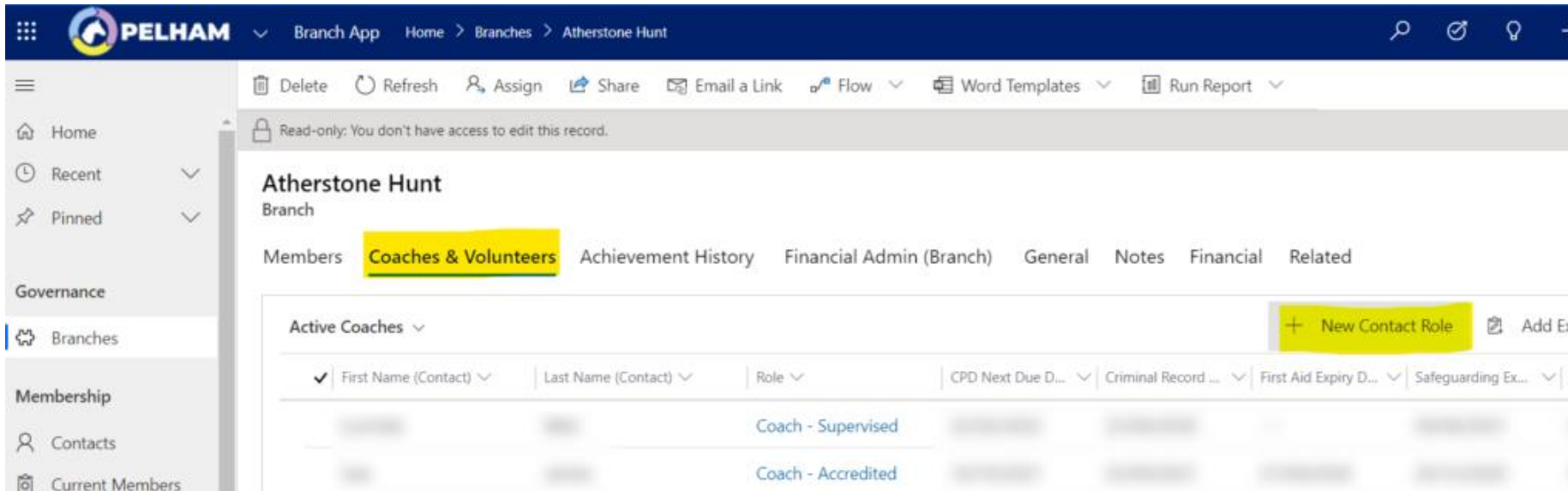
Minimum is title, first and last name. Advise also complete email and phone. Press Save and PC number allocated

How to add a Coach Role

Please Note: at the current time only coach and volunteer roles can be added.

There are 2 ways to do this, either from the contact record once created, or from within the Coaches and Volunteers tab on the Branch Summary page.

From the Branch Summary Page, go to Coaches & Volunteers and select **“+ New Contact Role”**




The screenshot shows the Pelham system interface for the 'Atherstone Hunt' branch. The 'Coaches & Volunteers' tab is selected and highlighted in yellow. Below the tab, there is a table of active coaches. The table has columns for 'First Name (Contact)', 'Last Name (Contact)', 'Role', 'CPD Next Due D...', 'Criminal Record ...', 'First Aid Expiry D...', and 'Safeguarding Ex...'. Two rows are visible: 'Coach - Supervised' and 'Coach - Accredited'. A '+ New Contact Role' button is highlighted in yellow in the top right corner of the table area.

How to add a Coach Role

From the Contact summary page, go to Branch Summary Page, go to Coaches/Volunteer tab and select “+ New Contact Role”
People can have multiple roles assigned to them.

Summary Addresses Family Membership Achievements Coach/Volunteer Preferences Related

Current Pony Club Roles + New Contact Role ↻ Refresh ⋮

| <input checked="" type="checkbox"/> Contact ▼ | Role ↑ ▼ | Organisation ▼ | Committee ▼ | Start Date ▼ | End Date ▼ | Created On ▼ |
|---|------------------------------------|-----------------------------|--------------------------|---------------------------|-------------------------|---------------------------|
|  No data available. | | | | | | |

How to add a Coach Role

Insert the role – start typing “Coach” and the options Coach – Accredited / expired/supervised will come up. It does not matter which level you select, and the system will update it according to the qualifications present. Insert the contact name (this will be defaulted in if the role is created directly from the Contact. The Branch/Area should also be populated.

The screenshot shows the 'New Contact Role' form in the PELHAM Branch App. The form is titled 'New Contact Role' and has a 'General' tab selected. The form fields are as follows:

| | |
|---------------------|------------------------|
| Role | --- |
| Contact | * [icon] |
| Email Address | --- |
| Area | * --- |
| Branch | * --- |
| Centre/Organisation | * --- |
| Committee | --- |
| Owner | * [icon] [icon] [icon] |

Enter the Start date to track when volunteers start work. To remove as a coach enter the end date. The role will be removed overnight.

This close-up shows three fields from the form:

| | |
|--------------------|------------|
| Start Date | 05/06/2022 |
| End Date | --- |
| Reason for Leaving | --- |

Overview

- Certifications held in Pelham are:
 - CRB – DBS (England & Wales), PVG (Scotland) and Access NI (N Ireland)
 - These qualifications must be updated every 3 years in Pelham, even if the annual check is used.
 - Safeguarding – Face to Face, Online
 - First Aid – Face to Face, Online

All are updated as new certifications are ratified for use by The Pony Club

How to add Coach Qualifications

CRB, Safeguarding and First Aid qualification are added in the same way as member badges/ tests. They can even be added using the bulk upload function.

Once you have found your coach, select Coach/volunteer tab:

Summary Addresses Family Membership Achievements Coach/Volunteer Preferences Related

Coaching & Volunteering

| | |
|----------------------------|------------|
| 🔒 Criminal Record | 06/06/2022 |
| Check Expiry Date | |
| 🔒 Safeguarding Expiry Date | 17/06/2022 |
| 🔒 First Aid Expiry Date | 08/03/2022 |
| 🔒 CPD Completed | Yes |
| 🔒 Last CPD Activity | 12/02/2021 |
| 🔒 CPD Next Due Date | 12/02/2023 |
| Availability | --- |

Reminder: these dates are driven by expiry dates on the current qualifications below

DO NOT just open this qualification and change the expiry date. THIS WILL NOT WORK

click here to add new qualification

Coaching - Current Qualifications + New Achievement His... ↻

| ✓ | First Name (Contact) ▾ | Last Name (Contact) ▾ | Qualification ▾ | Date Achieved ↓ ▾ | Expiry Date ▾ | Qualification Type ▾ | Email (Contact) ▾ | C |
|---|------------------------|-----------------------|-------------------|-------------------|---------------|----------------------|-------------------|---|
| | | | Face to face | 17/06/2019 | 17/06/2022 | Safeguarding | | |
| | | | DBS Certification | 07/06/2019 | 06/06/2022 | Disclosure | | |
| | | | FAW Certification | 08/03/2019 | 08/03/2022 | First Aid | | |

How to add Coach Qualifications

Now add the new qualification details, search works in a similar way.

Search examples:

| | |
|-----------------|--|
| Qualification * | sa |
| Date Achieved * | Qualifications/Achievements |
| Expiry Date | <input type="checkbox"/> Face to face Safeguarding |
| Owner * | <input type="checkbox"/> Online Safeguarding |

| | |
|-----------------|---|
| Qualification * | pvg |
| Date Achieved * | Qualifications/Achievements |
| Expiry Date | <input type="checkbox"/> PVG Certification Disclosure |

New Achievement History

General

| | |
|---|---|
| Contact * | [Redacted] |
| Qualification * | <input checked="" type="checkbox"/> DBS Certification X |
| <input type="checkbox"/> Blue Badge Eligible? | No |
| <input type="checkbox"/> Qualification Type | Disclosure |
| Date Achieved * | 09/05/2021 |
| Expiry Date | --- |
| Owner * | <input type="radio"/> Branch Heythrop H |

enter date achieved

| | |
|-----------------|------------|
| Date Achieved * | 09/05/2021 |
| Expiry Date | 08/05/2024 |

Once the qualification is found, enter the date achieved. Press Save and Expiry date will be calculated.

How to add Coach Qualifications

If it is CRB check, after saving, enter the certificate number in the Notes field

Timeline + ⌵

Create a note

Once saved, the date in they summary pane will be updated. The Coach status may also update, but this can take up to 20 minutes to updated.

NB: issue with some updates from Supervised to Accredited – being resolved

Coaching & Volunteering

| | |
|---|------------|
| <input type="checkbox"/> Criminal Record | |
| Check Expiry Date | 08/05/2024 |
| <input type="checkbox"/> Safeguarding Expiry Date | 08/05/2020 |
| <input type="checkbox"/> First Aid Expiry Date | 09/12/2019 |

How to add CPD

The “CPD Diary” is new to the Pony Club, and is not yet implemented so we only use a part of the ability in PELHAM to support this.

| | |
|---------------------|------------|
| 🔒 Last CPD Activity | 12/02/2021 |
| 🔒 CPD Next Due Date | 12/02/2023 |

Coaching - Current Qualifications + New Achievement His... Refresh

| ✓ First Name (Contact) ↓ | Last Name (Contact) ↓ | Qualification ↓ | Date Achieved ↓ | Expiry Date ↓ | Qualification Type ↓ | Email (Contact) ↓ | Created On ↓ |
|--------------------------|-----------------------|-------------------|-----------------|---------------|----------------------|-------------------|------------------|
| [Redacted] | [Redacted] | Face to face | 17/06/2019 | 17/06/2022 | Safeguarding | [Redacted] | 07/04/2020 12:02 |
| [Redacted] | [Redacted] | DBS Certification | 07/06/2019 | 06/06/2022 | Disclosure | [Redacted] | 07/04/2020 11:52 |
| [Redacted] | [Redacted] | FAW Certification | 08/03/2019 | | First Aid | [Redacted] | 07/04/2020 11:52 |

Click Here

CPD Activities + New CPD Activity Refresh Flow Run R

| ✓ Title ↑ | Contact ↓ | Supplier (Org) ↓ | Hours ↓ | Diary ↓ | Completed On D... ↓ | Actual Start ↓ | Period ↓ | Comments ↓ | Date Created ↓ |
|-----------------------------|------------|------------------|---------|------------|---------------------|----------------|----------|------------|----------------|
| PC Conference | [Redacted] | --- | 1 | --- | 20/02/2020 | --- | --- | Latest | 07/04/2020 1: |
| PC Conference 2021 - Virtua | [Redacted] | --- | 3 | [Redacted] | 12/02/2021 | --- | 2021 | --- | 02/03/2021 1: |
| Show Jump Course Building | [Redacted] | --- | 1 | --- | 05/07/2019 | --- | --- | --- | 07/04/2020 1: |



How to add CPD

New CPD Activity

General

| | | | |
|--------------|---|-----|--|
| Title | * | --- | enter title, currently free |
| Contact | * | --- | |
| Supplier | | --- | Enter date completed |
| Completed On | * | --- | |
| Location | | --- | |
| Regarding | | --- | |
| Hours | * | --- | enter number of hours. either actual or 1 if not known |
| Diary | | --- | |
| Evidence | | --- | |
| Period | | --- | |

How to become a brilliant coach

CPD Activity

General Related

| | | |
|--------------|---|---------------------------------|
| Title | * | How to become a brilliant coach |
| Contact | * | --- |
| Supplier | | --- |
| Completed On | * | 09/05/2021 |
| Location | | --- |
| Regarding | | --- |
| Hours | * | 2 |
| Diary | | (No Name) |
| Evidence | | --- |
| Period | | 2021 |

Save and Mark Complete:

Branch App

Save Mark Complete Save & Close Delete

How to become a brilliant coach

CPD Activity

General Related

Title * How to become a brilliant coach

How to become a brilliant coach

CPD Activity

General Related

| | | |
|--------------|---|---------------------------------|
| Title | * | How to become a brilliant coach |
| Contact | * | --- |
| Supplier | | --- |
| Completed On | * | 09/05/2021 |
| Location | | --- |
| Regarding | | --- |
| Hours | * | 2 |
| Diary | | CPD Diary 2021 |
| Evidence | | --- |
| Period | | 2021 |

Creates default diary

How to add CPD

CPD now visible and CPD dates updated:

| Coaching & Volunteering | |
|--|------------|
| 🔒 Criminal Record Check Expiry Date | 08/05/2024 |
| 🔒 Safeguarding Expiry Date | 08/05/2020 |
| 🔒 First Aid Expiry Date | 09/12/2019 |
| 🔒 CPD Completed | Yes |
| 🔒 Last CPD Activity | 09/05/2021 |
| 🔒 CPD Next Due Date | 08/05/2023 |

due date updated

| CPD Activities | | | | | | | | | | + New CPD Activity | Refresh | Flow | Run Report |
|------------------------------|---------|----------------|-------|-------|-------------------|--------------|--------|----------|------------------|--------------------|---------|------|------------|
| ✓ Title ↑ | Contact | Supplier (Org) | Hours | Diary | Completed On D... | Actual Start | Period | Comments | Date Created | Search this view | | | |
| How to become a brilliant cc | | --- | 2 | | CPD C 09/05/2021 | --- | 2021 | --- | 17/05/2021 17:20 | | | | |

For more detailed guidance, use the user guides to be found on here
<https://pelham.pcuk.org/index.php>