

# **Caregiver Portal Resource Guide**

What am I able to do in the Caregiver Portal?

 Register for memberships, sign up for additional programs, pay balances due, store payment methods, view household details, review recent transactions, and update member information.

Access to the Caregiver Portal can be found on our website or by clicking here.

Please bookmark this URL for quick access: <a href="https://mch-foxvalley.my.site.com/portal/s/login-home">https://mch-foxvalley.my.site.com/portal/s/login-home</a>

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If you have questions that this Caregiver Portal Guide was unable to answer, please ask your question on the form on the Caregiver Portal page by clicking here.

## **Login to Existing Account**

Step	Action				
1	Open the Caregiver Portal link and then enter your username (email) & password under ALREADY HAVE AN ACCOUNT?				
	If you do not recall your password, Click <b>Forgot Password?</b> To have a reset link sent to the email associated with your existing account.				
	ALREADY HAVE AN ACCOUNT?				
	Login Below				
	Username (Email)				
	Password				
	View My Account				
	Forgot Password?				

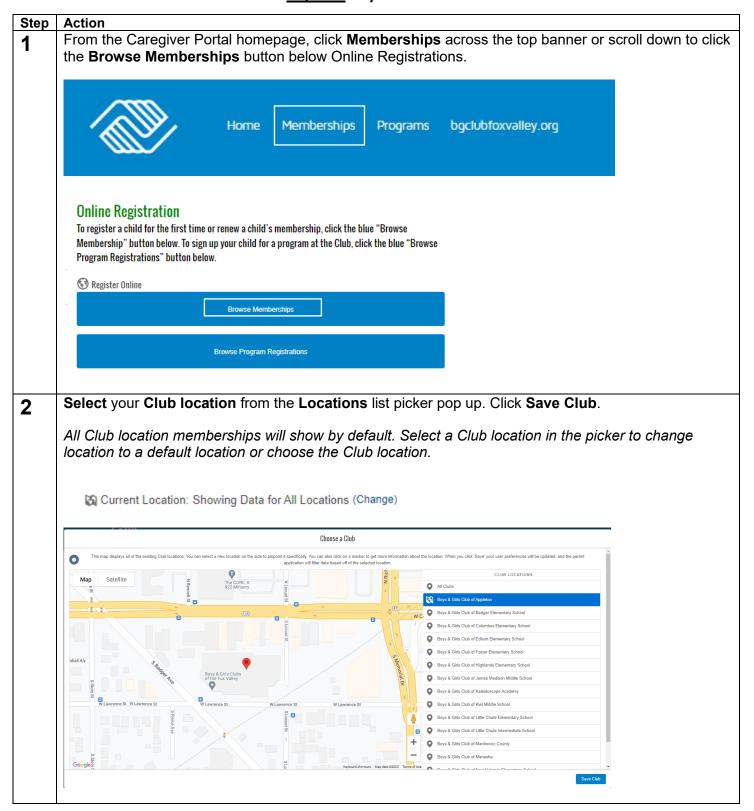
# **Create New Caregiver Portal Account**

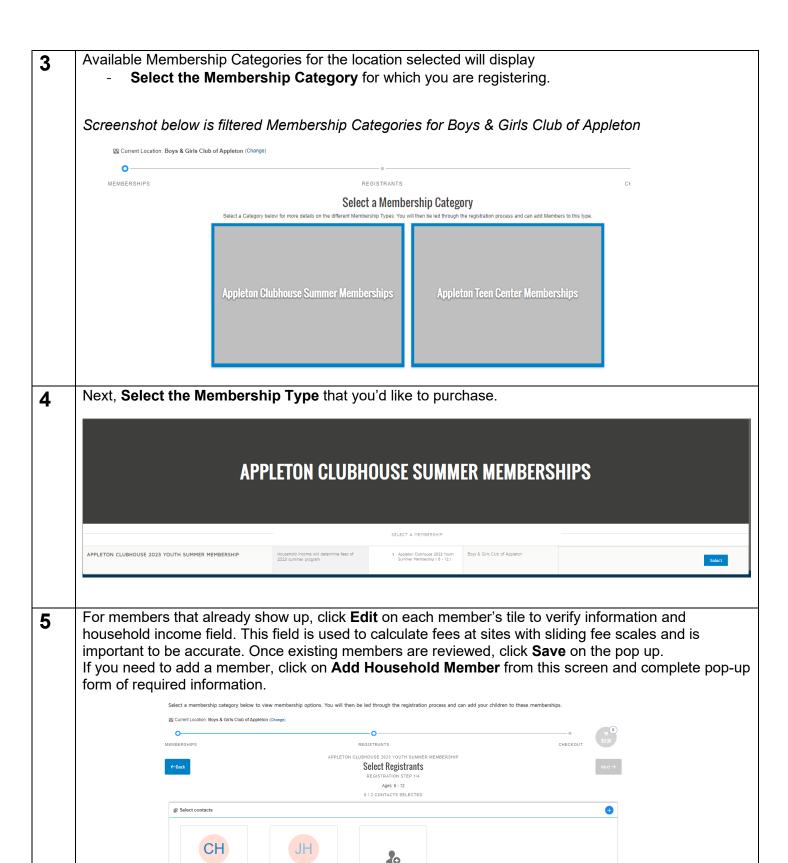
Step	Action			
1	Open the Caregiver Portal link and then click CREATE ACCOUNT for first-time			
-	logins only.			
	NEW TO THE PORTAL?			
	Register for a new Household Account			
	CREATE ACCOUNT			
	CREATE ACCOUNT			
	If you are returning to the Club but it is your FIRST time in this Parent Portal,			
	use the same parent/guardian first and last name and email address that you Club has on file, your account will be linked.			
	If you are unsure of the information your Club has on file, or receive an error message, please contact the Club.			
	Create Account Screen:			
2	Enter Required Field Information w	ith YOUR info	ormation, not the child's	
		iii i oortiine	ormation, not the orma o	
	Click Submit to create the new acco	unt. Please m	ake sure to use a valid email	
	address that you have access to.			
		* First name	*Lest rame	
		* Birthdate	'Emel	
		* Mobile Phone	Alternative Phone	
		*Street	¹City	
		*State	*Zip Cook	
		* Country	Employer/Organization	
		Role in HouseholdNone	•	
			Submit	
	Upon clicking <b>Submit</b> , you may see a pid	ture arid non u	n to verify security	
2	An automatic email with subject line "			
3	the email address provided. <i>Please c</i> .			
	First Olightha langulinkin amail ta	h - h	the Observe Very Become	
	First, Click the long link in email to be brought to the Change Your Password Screen			
	00.0011			
	Next, Create a Password. Make note that your email address is your user			

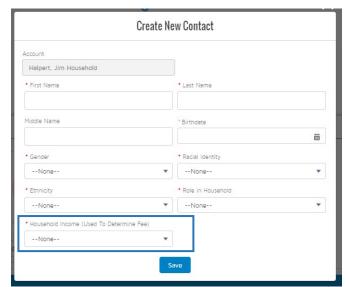
# Sandbox: Welcome to the Caregiver Portal Inbox x MyClubHub Caregiver Portal donotreply@bgclubfoxvalley.org via 3f6a1zl54vue.7e-jhehaeaj.cs193.bnc.sandbox.salesforce.com Hi Nancy, Welcome to the Caregiver Portal! To get started, go to <a href="https://mch-foxvalley--sandbox.sandbox.my.site.com/portal/login?c=dhRH5sC">https://mch-foxvalley--sandbox.sandbox.my.site.com/portal/login?c=dhRH5sC</a> $\underline{4tCYf3j3LUSsMzaYscF5n7h8LOSBZs8z.M7s6YxTdxaUtNtnXHTw6XD18M4NCDpTyEbXFL\_7boPt5wx31G6bsF9COy\_QqkbS9moEq.zYFS}$ Username: myclubhubtester@gmail.com Thanks, Boys & Girls Clubs of the Fox Valley ← Reply → Forward Change Your Password Enter a new password for s (Your email Here) Make sure to include at least: 8 characters 1 letter O 1 number \* New Password \* Confirm New Password Password was last changed on 2/22/2023, 4:20 PM. Now you are logged into the Caregiver Portal homepage!

# **Adding a Membership**

This is a required step for ALL families.





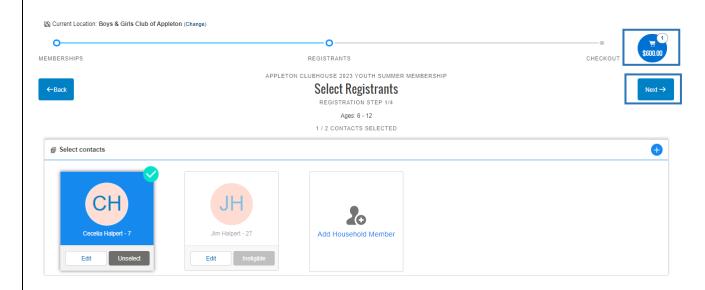


Click **Save** on the Create New Contact pop up once all information is entered.

After all members have been reviewed/added, **Select** each member you want to enroll in this membership by **clicking on their blue Select button in each tile**.

If they are eligible their blue button will say Select.

If they are not eligible, it will say Ineligible in grey. For ineligible household members, hover over the ineligible button to see why. There may be age restrictions on the membership.



Members selected will show a green check box on their contact square.

The shopping cart in the upper right will update to the amount owed. Please reference your site's webpage for additional information regarding fees.

Click **Next** (blue rectangular Next on right of screen)

### Membership Questions: 7

Click the member's name and answer the Membership Questions form. Toggle between members (if registering multiple) on the top, underneath the Membership Question header.

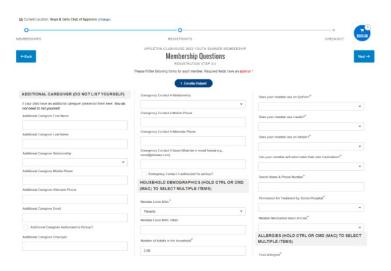
Each member will have their own set of questions to be answered. This section is where most of your time will be spent. If you are an existing member, the data we have on file will pre-populate for certain questions making this process quicker.

Please review and complete ALL information on the Membership Question Form for each member.

Additional Caregivers are not considered Emergency Contacts. You must have one additional Emergency Contact/Authorized Pick Up. There are spaces for up to 4 Emergency Contacts.

Helpful Hint: Hold CTRL/CMD + Select options for questions requesting multiple selections

(example: on Medical/Allergy Questions)



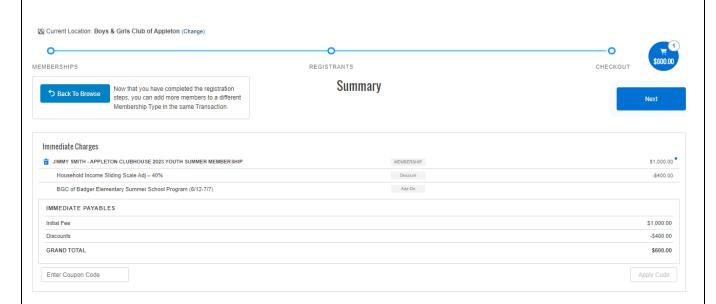
- Next it will bring you to the Sign Contracts Page. For each child, you will need to click the Sign 8 button, then Confirm, then Complete. By clicking Confirm and Complete, you agree to the terms described in the materials both on the registration website and the written instructions.
  - Contracts you may see include Caregiver Release, Authorized Pick Up & Acceptance of Family Handbook.



Once all contracts are signed, click the **Finish** button.

You will then be led to a **Summary Page**. This is where you can see all due fees and any scholarship reductions applied based on the sliding fee scale or age.

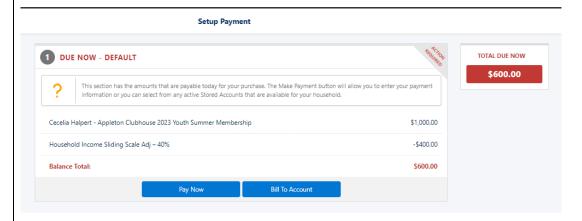
If all information on the summary page is correct, select the **Next** button to be taken to a payment screen.



Note: Please disregard the Coupon Code field as that is not being used by our organization.

### 10 Click either Pay Now or Bill to Account.

Note: By clicking Pay Now, you will be prompted to enter your credit card information.



If you click **Bill to Account**, the balance will be added to your household account. This can be paid later in one of the following ways:

- On the Caregiver Portal via credit card
- In person at our Club locations via cash, check or credit card
- Mailed in check to our Appleton office (160 S Badger Ave, Appleton, WI 54914)

If you need additional financial assistance or have questions on the fees being shown, select **Bill to Account** and contact your Club site directly.

### School Year Billing Notes:

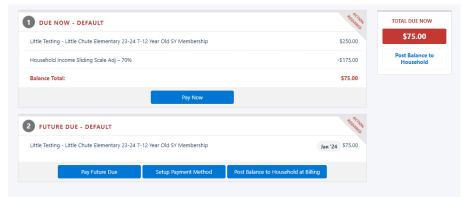
For sites with Semester Billing, additional options will show on the Payment Screen (ex: Elementary School Sites during School Year Programming)

### Semester 1 Fee "Due Now" Options

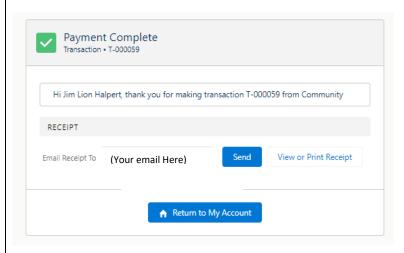
- Pay Now collect payment now via credit card
- Post Balance to Household pay amount at a later date with options indicated previously

### Semester 2 Fee "Future Due" Options

- Pay Future Due collect payment for Semester 2 fees now via credit card
- Setup Payment Method put card on file for us to automatically charge for future due amount
- Post Balance to Household at Billing— when we bill future amounts, this will be added as a balance due on your household account to be paid with options indicated previously



- 11 From the next **Payment Complete Page**, you have the following options:
  - Send Receipt
  - View or Print Receipt
  - Navigate back to the Account home page



Once your registration is complete, you will receive a general automatic email. *Check your junk or spam folders.* 

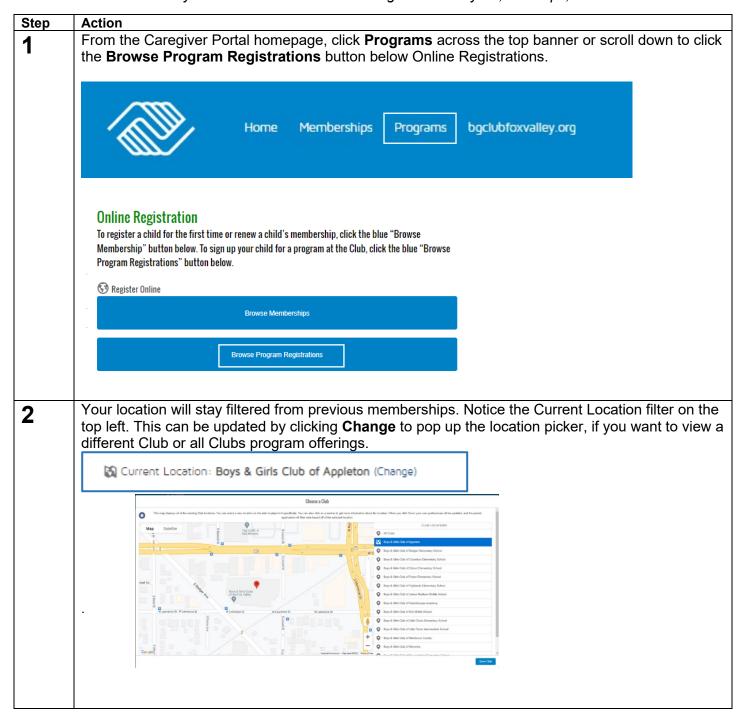
Please also watch for more Club specific information from your site as follow up.

# **Adding a Program Registration**

This is an additional step after the Membership completion.

Registered Programs are additional, <u>optional</u>, program registrations that require sign ups for events or programs beyond the typical membership attendance.

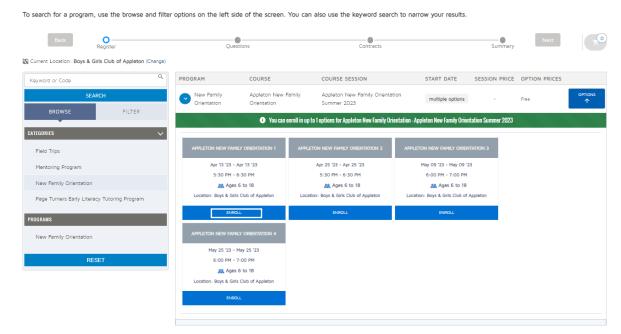
Examples of registered programs include our Page Turners literacy program, Non School & break days at our branch locations during the school year, field trips, etc.



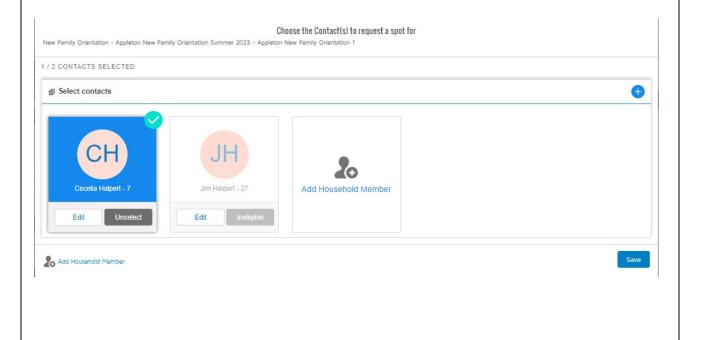
3 Available programs for the location selected will display

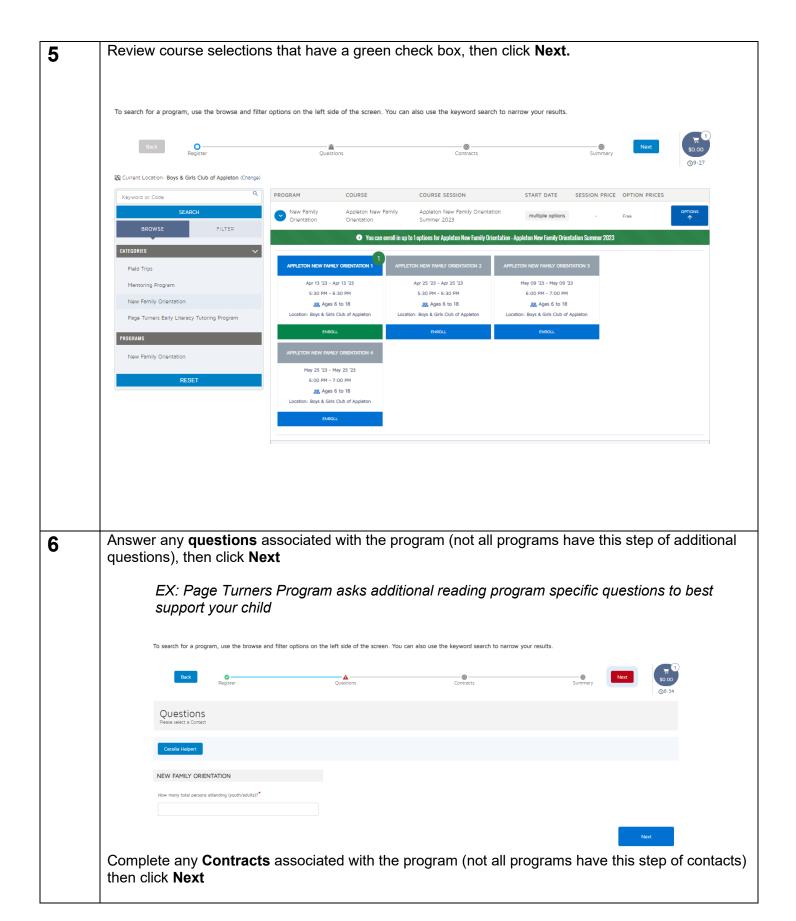
Select the program category and course option you wish to sign up for

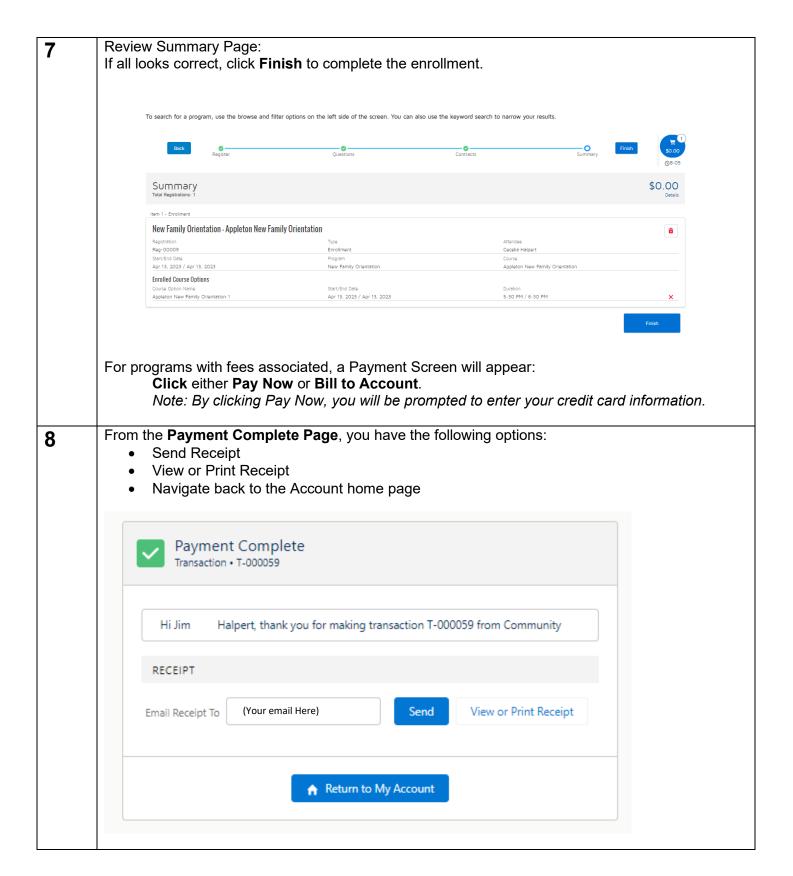
Screenshot below is filtered for programs for Boys & Girls Club of Appleton > New Family Orientation



Click **Enroll** on the course option selection you wish to sign up for, then click the blue **Select** button on each member. Click **Save.** 

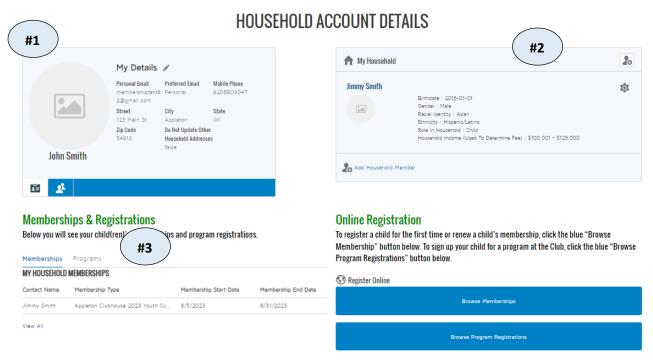






# **Caregiver Portal Homepage**

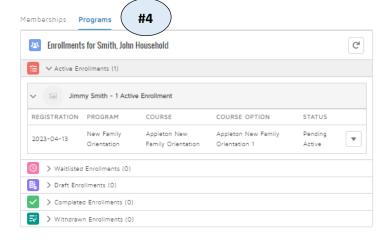




- 1. Your Information
- Additional Household Members
- 3. Memberships
- 4. Program Registrations

### Memberships & Registrations

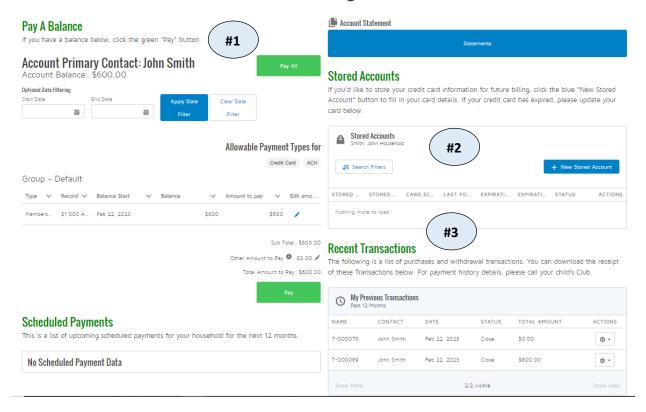
Below you will see your child(ren)'s memberships and program registrations.



# **Caregiver Portal Billing Tab**



### **Household Billing Details**



- 1. Pay a Balance
- 2. Add Stored Credit Card Accounts (+ New Stored Account)

Adding a store account makes paying balances & completing sign ups easier. Credit card numbers are secure & encrypted for your security. Full card information is not visible to us. We will also never charge a card on file without your consent.

3. Recent Transactions

# **Update your Information**

The steps below cover the process to update your child's information (e.g., emergency contact information & authorized pick ups) originally captured during the membership application process.



After logging into the Caregiver Portal, locate the **Update Your Information** tab.

**Select** a **household member** from the Select Household Member drop-down menu. **Select** a **form** from the **Form to Update** field. Click **Next**.

On the next screen, fill in all necessary fields and click Next.

**Click** the **Finish** button to complete. Your information is now updated!

