



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, add stored payment methods, view household details, review recent transactions, and update member information.

Access to the Caregiver Portal can be found on our website, by clicking [here](#), or scanning the QR Code.



Bookmark this URL for quick access: <https://mch-foxvalley.my.site.com/portal/s/login-home>

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If you have questions unable to be answered by this Caregiver Portal Guide, please submit your question to the form found on the Caregiver Portal support webpage page, by [clicking here](#), or scanning the QR Code.



Caregiver Portal Support Webpage: Website > Join > Caregiver Portal Support

Login to Existing Account

Step	Action
1	<p>Open the Caregiver Portal link and then enter your username (email) & password under ALREADY HAVE AN ACCOUNT?</p> <p>If you do not recall your password, Click Forgot Password? To have a reset link sent to the email associated with your existing account.</p> <div style="text-align: center;"> <p>ALREADY HAVE AN ACCOUNT?</p> <p>Login Below</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin: 0 auto;"> <input type="text" value="Username (Email)"/> </div> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin: 5px auto;"> <input type="password" value="Password"/> </div> <div style="background-color: #0070c0; color: white; padding: 5px; width: fit-content; margin: 5px auto; text-align: center;"> View My Account </div> <p style="margin-top: 5px;">Forgot Password?</p> </div>

Create New Caregiver Portal Account

Step	Action																
1	<p>Open the Caregiver Portal link and then click CREATE ACCOUNT for first-time logins only.</p> <div style="text-align: center;"> <p>NEW TO THE PORTAL? Register for a new Household Account</p> <div style="border: 2px solid #0070c0; background-color: #0070c0; color: white; padding: 10px; display: inline-block; margin: 10px auto;"> <p>CREATE ACCOUNT</p> </div> <p style="font-size: small; margin-top: 10px;">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 your Club has on file, your account will be linked.</p> <p style="font-size: x-small; margin-top: 10px;">If you are unsure of the information your Club has on file, or receive an error message, please contact the Club.</p> </div>																
2	<p>Create Account Screen: Enter Required Field Information with YOUR information, not the child's</p> <p>Click Submit to create the new account. Please make sure to use a valid email address that you have access to.</p> <div style="text-align: center;"> <p>Create Account</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;"><input type="text" value="First name"/></td> <td style="width: 50%;"><input type="text" value="Last name"/></td> </tr> <tr> <td><input type="text" value="Birthdate"/></td> <td><input type="text" value="Email"/></td> </tr> <tr> <td><input type="text" value="Mobile Phone"/></td> <td><input type="text" value="Alternative Phone"/></td> </tr> <tr> <td><input type="text" value="Street"/></td> <td><input type="text" value="City"/></td> </tr> <tr> <td><input type="text" value="State"/></td> <td><input type="text" value="Zip Code"/></td> </tr> <tr> <td><input type="text" value="Country"/></td> <td><input type="text" value="Employer/Organization"/></td> </tr> <tr> <td colspan="2"><input type="text" value="Role in Household"/></td> </tr> <tr> <td colspan="2" style="text-align: center;"><input type="button" value="Submit"/></td> </tr> </table> </div> <p><i>Upon clicking Submit, you may see a picture grid pop up to verify security.</i></p>	<input type="text" value="First name"/>	<input type="text" value="Last name"/>	<input type="text" value="Birthdate"/>	<input type="text" value="Email"/>	<input type="text" value="Mobile Phone"/>	<input type="text" value="Alternative Phone"/>	<input type="text" value="Street"/>	<input type="text" value="City"/>	<input type="text" value="State"/>	<input type="text" value="Zip Code"/>	<input type="text" value="Country"/>	<input type="text" value="Employer/Organization"/>	<input type="text" value="Role in Household"/>		<input type="button" value="Submit"/>	
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<input type="text" value="Country"/>	<input type="text" value="Employer/Organization"/>																
<input type="text" value="Role in Household"/>																	
<input type="button" value="Submit"/>																	

3

An automatic email with subject line “Welcome to the Caregiver Portal” will be sent to the email address provided. *Please check your junk or spam folders.*

First, **Click the long link in email** to be brought to the **Change Your Password Screen**

Next, **Create a Password**. Make note that your email address is your username.

Sandbox: Welcome to the Caregiver Portal Inbox x



MyClubHub Caregiver Portal donotreply@bgclubfoxvalley.org via 3f6a1zl54vue.7e-jhehaej.cs193.bnc.sandbox.salesforce.com to me ▾

Hi Nancy,

Welcome to the Caregiver Portal! To get started, go to https://mch-foxvalley--sandbox.sandbox.my.site.com/portal/login?c=dhRH5sC4tCYfj3LUSsMzaYscF5n7h8LOSBZs8z_M7s6YxTdxuUtnXHTw6XD18M4NCDpTyEbXFL_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 scray.marissa@gmail.com.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

* Confirm New Password

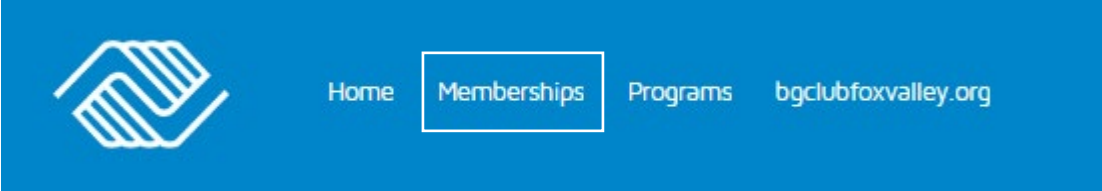
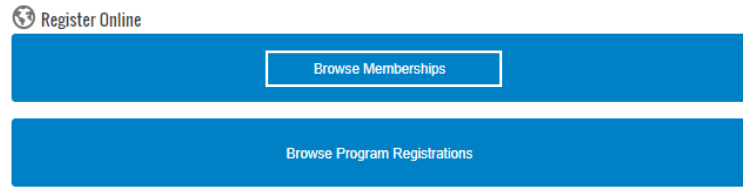
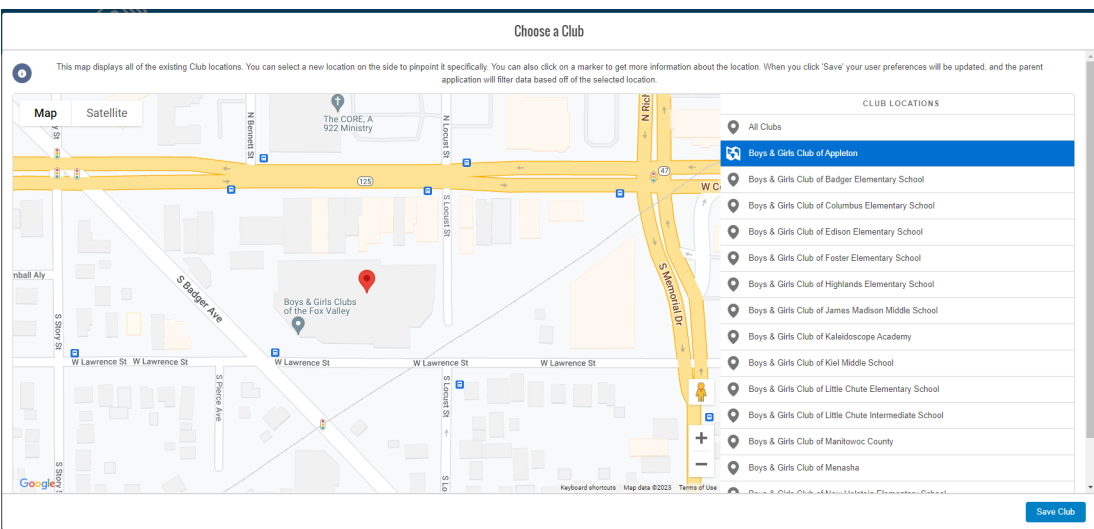
Change Password

Password was last changed on 2/22/2023, 4:20 PM.

Now you are logged into the Caregiver Portal homepage!

Adding a Membership

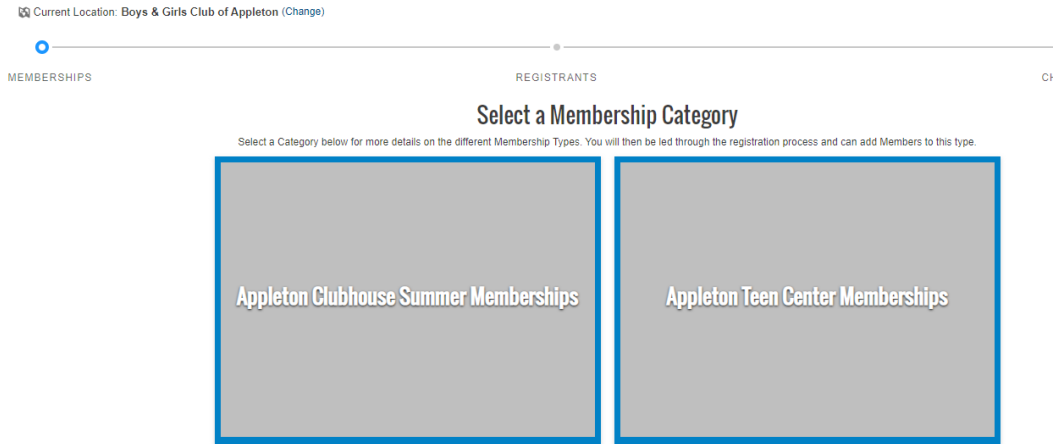
This is a required step for ALL families.

Step	Action
1	<p>From the Caregiver Portal homepage, click Memberships across the top banner or scroll down to click the Browse Memberships button below Online Registrations.</p>  <p>Online Registration To register a child for the first time or renew a child's membership, click the blue "Browse Membership" button below. To sign up your child for a program at the Club, click the blue "Browse Program Registrations" button below.</p> 
2	<p>Select your Club location from the Locations list picker pop up. Click Save Club.</p> <p><i>All Club location memberships will show by default. Select a Club location in the picker to change location to a default location or choose the Club location.</i></p> 

3

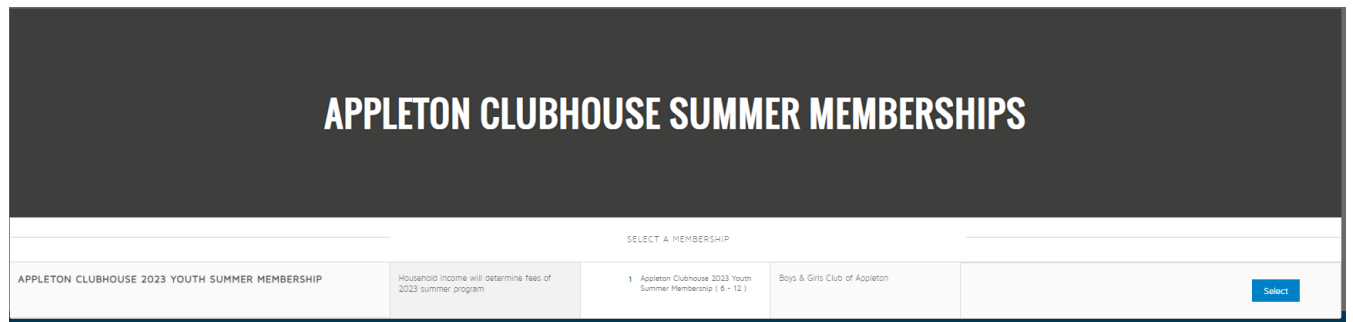
Available Membership Categories for the location selected will display
- **Select the Membership Category** for which you are registering.

Screenshot below is filtered Membership Categories for Boys & Girls Club of Appleton



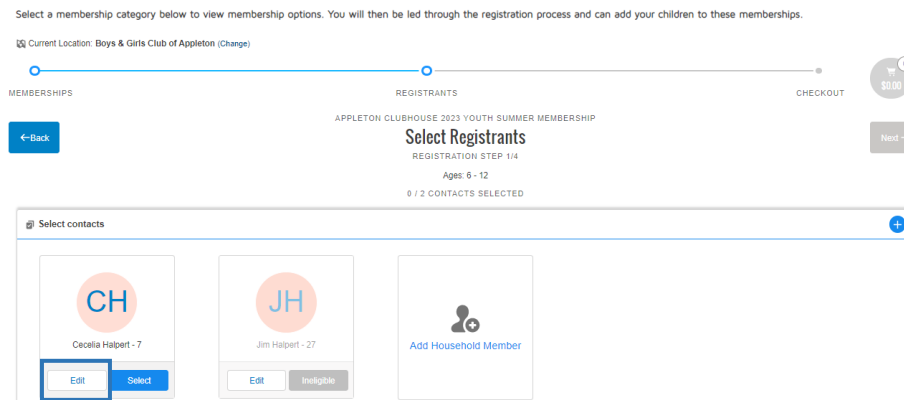
4

Next, **Select the Membership Type** that you'd like to purchase.



5

For members that already show up, click **Edit** on each member's tile to verify information and household income field. This field is used to calculate fees at sites with sliding fee scales and is important to be accurate. Once existing members are reviewed, click **Save** on the pop up. If you need to add a member, click on **Add Household Member** from this screen and complete pop-up form of required information.



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 the reason why. There are age restrictions on certain memberships.

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)

7 Membership Questions:
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 they are an existing member, certain questions will pre-populate with the data we have on file.

Please review and complete ALL information on the Membership Question Form for each member. A red message will appear if any required questions are not completed. All required questions are necessary to move forward.

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)

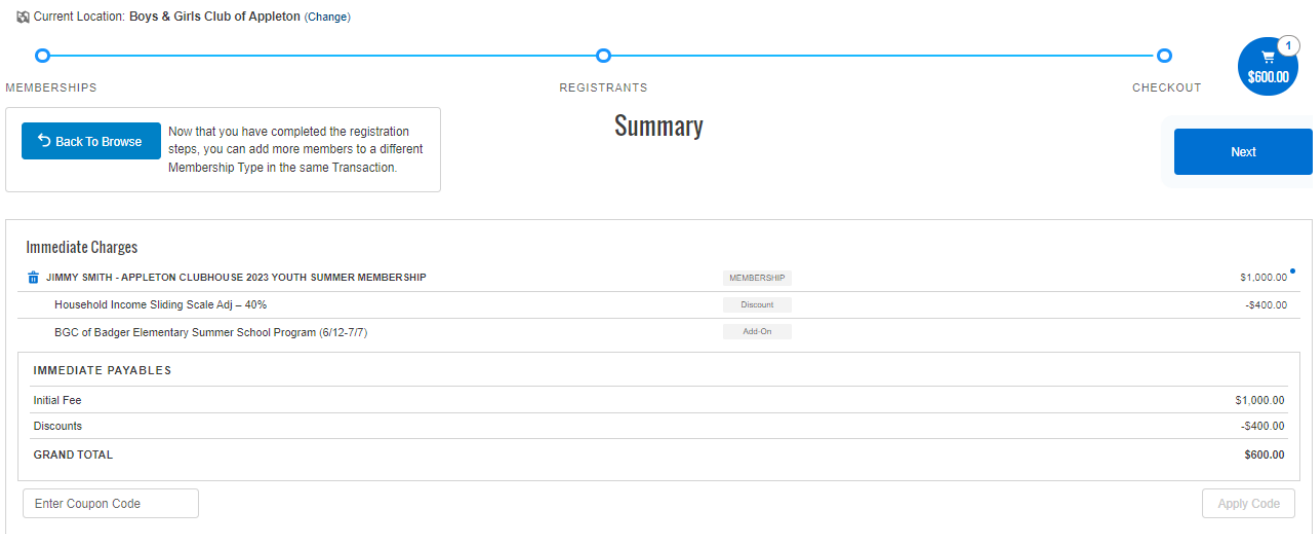
8 Next it will take you to the **Sign Contracts Page**. For each member, you will need to click the **Sign** button, then **Confirm**, then **Complete**. By clicking Confirm and Complete, you agree to the terms described in the materials both on the registration website and the written instructions.

- Contracts to sign include Acceptance of Family Handbook, Authorized Pick Up Policy, Caregiver Release & Technology Usage.

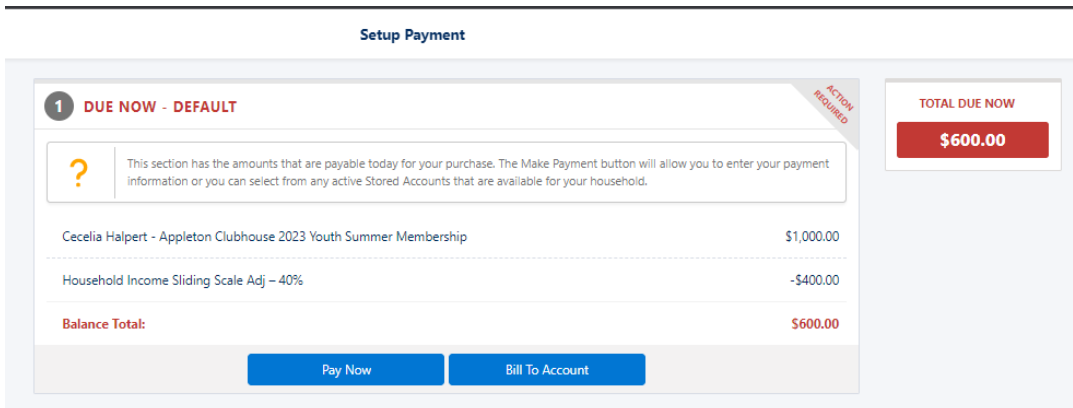
CONTRACT NAME	CONTRACT STATUS	SIGNATURE	LAST MODIFIED	ATTACHMENT	COMPLETED ON	REQUIRED
Little - Acceptance of Family Handbook	Draft	Sign		N/A	N/A	Prior to Purchase
Little - Authorized Pick Up Policy	Draft	Sign		N/A	N/A	Prior to Purchase
Little - Caregiver Release	Draft	Sign		N/A	N/A	Prior to Purchase
Little - Technology Usage	Draft	Sign		N/A	N/A	Prior to Purchase

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

9 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.



10 On the payment screen, **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 about the fees being shown, select **Bill to Account** and contact your Club site directly.

School Year Billing Notes:

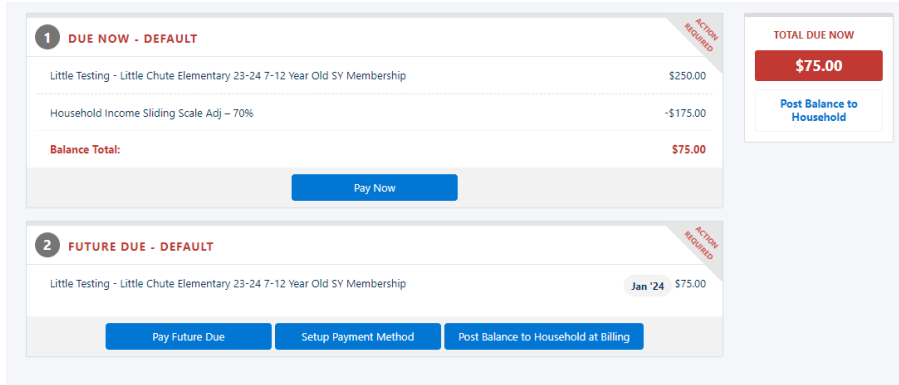
For sites with Semester Billing, additional options will show on the Payment Screen (ex: certain Elementary School Sites during School Year Programming)

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

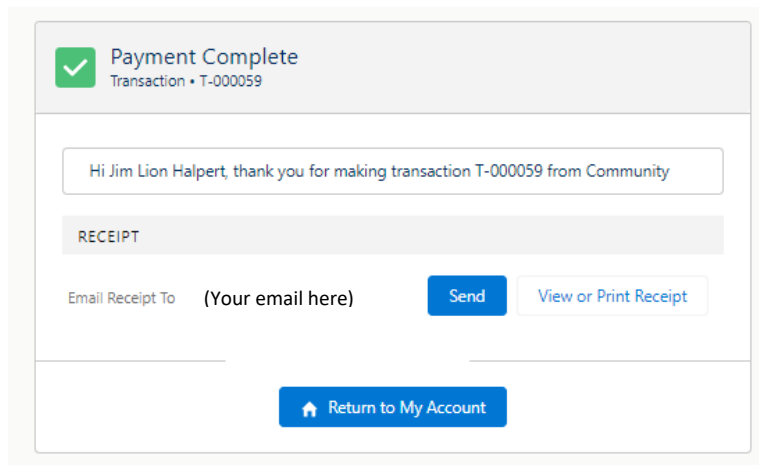
- Pay Future Due - collect payment for Semester 2 fees now via credit card
- Setup Payment Method – put card on file for us to automatically charge for future due amount
- Post Balance to Household at Billing– when we bill future amounts, this will be added as a balance due on your household account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



12

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

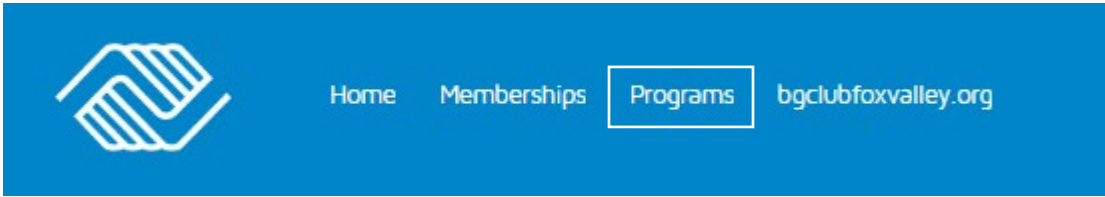
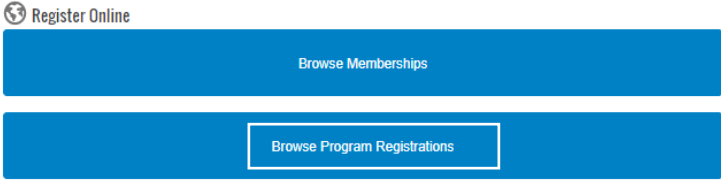
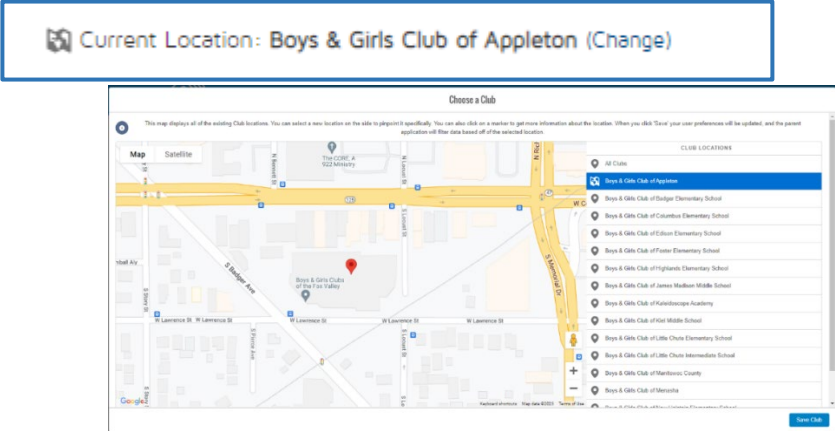
Please be aware that you may also receive additional Club specific information from your site directly.

Adding a Program Registration

Registered programs (required or optional) are an additional step after the Membership & will be communicated as needed by your location.

Examples of required registered programs include weekly Summer Program at Appleton, Menasha & Manitowoc branch locations, school year transportation at Appleton or Manitowoc.

Examples of optional registered programs include field trips, Page Turners Early Literacy program, school year non school days at our branch locations, etc.

Step	Action
<p>1</p>	<p>From the Caregiver Portal homepage, click Programs across the top banner or scroll down to click the Browse Program Registrations button below Online Registrations.</p>  <p>Online Registration To register a child for the first time or renew a child's membership, click the blue "Browse Membership" button below. To sign up your child for a program at the Club, click the blue "Browse Program Registrations" button below.</p> 
<p>2</p>	<p>Your location will stay filtered from previous memberships. Notice the Current Location filter on the top left. This can be updated by clicking Change to pop up the location picker, if you want to view a different Club or all Clubs program offerings.</p> 

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

To search for a program, use the browse and filter options on the left side of the screen. You can also use the keyword search to narrow your results.

Back Register Questions Contracts Summary Next

Current Location: Boys & Girls Club of Appleton (Change)

Keyword or Code SEARCH

BROWSE FILTER

CATEGORIES

- Field Trips
- Mentoring Program
- New Family Orientation
- Page Turners Early Literacy Tutoring Program

PROGRAMS

- New Family Orientation

RESET

PROGRAM	COURSE	COURSE SESSION	START DATE	SESSION PRICE	OPTION PRICES	
New Family Orientation	Appleton New Family Orientation	Appleton New Family Orientation Summer 2023	multiple options	-	Free	OPTIONS ↑
You can enroll in up to 1 options for Appleton New Family Orientation - Appleton New Family Orientation Summer 2023						
APPLETON NEW FAMILY ORIENTATION 1		APPLETON NEW FAMILY ORIENTATION 2		APPLETON NEW FAMILY ORIENTATION 3		
Apr 13 '23 - Apr 13 '23 5:30 PM - 6:30 PM Ages 6 to 18 Location: Boys & Girls Club of Appleton		Apr 25 '23 - Apr 25 '23 5:30 PM - 6:30 PM Ages 6 to 18 Location: Boys & Girls Club of Appleton		May 09 '23 - May 09 '23 6:00 PM - 7:00 PM Ages 6 to 18 Location: Boys & Girls Club of Appleton		
ENROLL		ENROLL		ENROLL		
APPLETON NEW FAMILY ORIENTATION 4						
May 25 '23 - May 25 '23 6:00 PM - 7:00 PM Ages 6 to 18 Location: Boys & Girls Club of Appleton						
ENROLL						

4

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

Choose the Contact(s) to request a spot for

New Family Orientation - Appleton New Family Orientation Summer 2023 - Appleton New Family Orientation 1

1 / 2 CONTACTS SELECTED

Select contacts

CH Cecelia Halpert - 7 [Edit] [Unselect]

JH Jim Halpert - 27 [Edit] [Ineligible]

Add Household Member

Save

5

Review course selections that have a green check box, then click **Next**.

To search for a program, use the browse and filter options on the left side of the screen. You can also use the keyword search to narrow your results.

Back Register Questions Contracts Summary Next \$0.00 09:27

Current Location: Boys & Girls Club of Appleton (Change)

Keyword or Code SEARCH BROWSE FILTER

CATEGORIES Field Trips Mentoring Program New Family Orientation Page Turners Early Literacy Tutoring Program PROGRAMS New Family Orientation RESET

PROGRAM	COURSE	COURSE SESSION	START DATE	SESSION PRICE	OPTION PRICES	
New Family Orientation	Appleton New Family Orientation	Appleton New Family Orientation Summer 2023	multiple options	-	Free	OPTIONS ↑
You can enroll in up to 1 options for Appleton New Family Orientation - Appleton New Family Orientation Summer 2023						
<div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid #ccc; padding: 5px; width: 30%;"> <p>APPLETON NEW FAMILY ORIENTATION 1</p> <p>Apr 13 '23 - Apr 13 '23 5:30 PM - 6:30 PM Ages 6 to 18 Location: Boys & Girls Club of Appleton</p> <p>ENROLL</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 30%;"> <p>APPLETON NEW FAMILY ORIENTATION 2</p> <p>Apr 25 '23 - Apr 25 '23 5:30 PM - 6:30 PM Ages 6 to 18 Location: Boys & Girls Club of Appleton</p> <p>ENROLL</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 30%;"> <p>APPLETON NEW FAMILY ORIENTATION 3</p> <p>May 09 '23 - May 09 '23 6:00 PM - 7:00 PM Ages 6 to 18 Location: Boys & Girls Club of Appleton</p> <p>ENROLL</p> </div> </div>						
<div style="border: 1px solid #ccc; padding: 5px; width: 100%;"> <p>APPLETON NEW FAMILY ORIENTATION 4</p> <p>May 25 '23 - May 25 '23 6:00 PM - 7:00 PM Ages 6 to 18 Location: Boys & Girls Club of Appleton</p> <p>ENROLL</p> </div>						

6

Answer any **questions** associated with the program (not all programs have this step of additional questions), then click **Next**

EX: Page Turners Program asks additional reading program specific questions to best support your child

To search for a program, use the browse and filter options on the left side of the screen. You can also use the keyword search to narrow your results.

Back Register Questions Contracts Summary Next \$0.00 08:34

Questions
Please select a Contact

Cecelio Halpert

NEW FAMILY ORIENTATION

How many total persons attending (youth/adults)? *

Next

Complete any **Contracts** associated with the program (not all programs have this step of contracts) then click **Next**

7

Review Summary Page:
If all looks correct, click **Finish** to complete the enrollment.

To search for a program, use the browse and filter options on the left side of the screen. You can also use the keyword search to narrow your results.

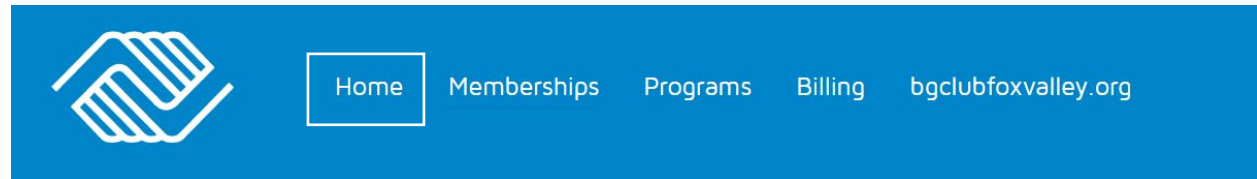
For programs with fees associated, a Payment Screen will appear:
Click either Pay Now or Bill to Account.
Note: By clicking Pay Now, you will be prompted to enter your credit card information.

8

From the **Payment Complete Page**, you have the following options:

- Send Receipt
- View or Print Receipt
- Navigate back to the Account home page

Caregiver Portal Homepage



HOUSEHOLD ACCOUNT DETAILS

#1

My Details ✎

Personal Email
membershiptest82@gmail.com

Preferred Email
Personal

Mobile Phone
9206803047

Street
123 Main St

City
Appleton

State
WI

Zip Code
54913

Do Not Update Other Household Addresses
false

John Smith

#2

My Household

Jimmy Smith

Birthdate : 2016-01-01
Gender : Male
Racial Identity : Asian
Ethnicity : Hispanic/Latino
Role in Household : Child
Household Income (Used To Determine Fee) : \$100,001 - \$125,000

[Add Household Member](#)

Memberships & Registrations

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

#3

[Memberships](#) [Programs](#)

MY HOUSEHOLD MEMBERSHIPS

Contact Name	Membership Type	Membership Start Date	Membership End Date
Jimmy Smith	Appleton Clubhouse 2023 Youth Su...	6/5/2023	8/31/2023

[View All](#)

Online Registration

To register a child for the first time or renew a child's membership, click the blue "Browse Membership" button below. To sign up your child for a program at the Club, click the blue "Browse Program Registrations" button below.

[Register Online](#)

[Browse Memberships](#)

[Browse Program Registrations](#)

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

Memberships & Registrations

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

#4

[Memberships](#) [Programs](#)

Enrollments for Smith, John Household

Active Enrollments (1)

Jimmy Smith - 1 Active Enrollment

REGISTRATION	PROGRAM	COURSE	COURSE OPTION	STATUS
2023-04-13	New Family Orientation	Appleton New Family Orientation	Appleton New Family Orientation 1	Pending Active

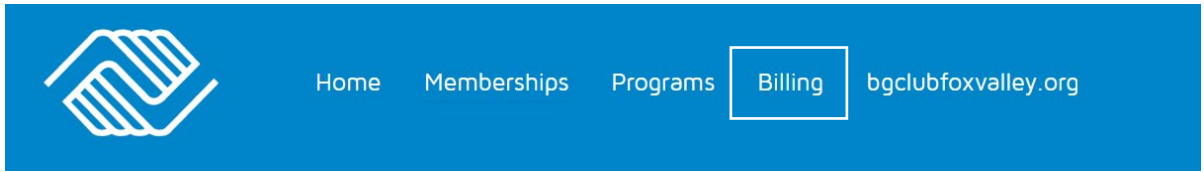
Waitlisted Enrollments (0)

Draft Enrollments (0)

Completed Enrollments (0)

Withdrawn Enrollments (0)

Caregiver Portal Billing Tab



Household Billing Details

Pay A Balance

If you have a balance below, click the green "Pay" button.

#1

Account Primary Contact: John Smith
Account Balance: \$600.00

Pay All

Optional Date Filtering

Start Date: End Date:
 Apply Date Filter Clear Date Filter

Allowable Payment Types for

Credit Card ACH

Group - Default

Type	Record	Balance Start	Balance	Amount to pay	Edit amo...
Members...	\$1,000 A...	Feb 22, 2023		\$600	\$600

Sub Total: \$600.00

Other Amount to Pay: \$0.00

Total Amount to Pay: \$600.00

Pay

Scheduled Payments

This is a list of upcoming scheduled payments for your household for the next 12 months.

No Scheduled Payment Data

Account Statement

Statements

Stored Accounts

If you'd like to store your credit card information for future billing, click the blue "New Stored Account" button to fill in your card details. If your credit card has expired, please update your card below.

Stored Accounts
Smith, John Household

Search Filters + New Stored Account

STORED ...	STORED ...	CARD SC...	LAST FO...	EXPIRATI...	EXPIRATI...	STATUS	ACTIONS
Nothing more to load							

#2

#3

Recent Transactions

The following is a list of purchases and withdrawal transactions. You can download the receipt of these Transactions below. For payment history details, please call your child's Club.

My Previous Transactions

Past 12 Months

NAME	CONTACT	DATE	STATUS	TOTAL AMOUNT	ACTIONS
T-000070	John Smith	Feb 22, 2023	Close	\$0.00	
T-000069	John Smith	Feb 22, 2023	Close	\$600.00	

Show More 2/2 visible Show Less

1. Pay A Balance

2. Add Stored Credit Card Accounts (+ New Stored Payment Method)

Adding a stored payment method makes paying balances & completing signups easier. Credit card numbers are secure & encrypted for your security. Full card information is not visible to us. We will 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!

To update your profile or information for your child, select the appropriate form from the list below.

Please use the dropdowns below to select your household member and which form you would like to update. You will then be given a chance to update the information stored for them!

If you would like to update multiple forms, you can click 'Finish' after saving a form and start again.

*Select Household Member
Member

*Select Form to Update
Additional Caregiver/Emergency Contacts & Auth Pick Up

Next

To update your profile or information for your child, select the appropriate form from the list below.

Custom Questions

ADDITIONAL CAREGIVER (DO NOT LIST YOURSELF)

If your child has an additional caregiver please list them here. *You do not need to list yourself.*

Additional Caregiver First Name

Additional Caregiver Last Name

Additional Caregiver Relationship

Additional Caregiver Mobile Phone

Additional Caregiver Alternate Phone

Additional Caregiver Email (Must be in email format e.g., email@domain.com)

Additional Caregiver Authorized to Pickup?

Additional Caregiver Employer

Emergency Contact 1 Mobile Phone*

Emergency Contact 1 Alternate Phone

Emergency Contact 1 Email (Must be in email format e.g., email@domain.com)

Emergency Contact 1 authorized for pickup?

EMERGENCY CONTACT 2/AUTHORIZED TO PICKUP

Emergency Contact 2 First Name

Emergency Contact 2 Last Name

Emergency Contact 2 Relationship

Emergency Contact 2 Mobile Phone

Emergency Contact 2 Alternate Phone

Emergency Contact 3 Last Name

Emergency Contact 3 Relationship

Emergency Contact 3 Mobile Phone

Emergency Contact 3 Alternate Phone

Emergency Contact 3 Email (Must be in email format e.g., email@domain.com)

Emergency Contact 3 authorized for pickup?

EMERGENCY CONTACT 4/AUTHORIZED TO PICKUP

Emergency Contact 4 First Name

Emergency Contact 4 Last Name

Emergency Contact 4 Relationship