



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: www.bgclubfoxvalley.org > 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)"/> <input type="password" value="Password"/> <input type="button" value="View My Account"/> Forgot Password? </div> </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?</p> <p>Register for a new Caregiver Account</p> <div style="border: 2px solid #76b82a; padding: 10px; display: inline-block; background-color: #76b82a; color: white; font-weight: bold; margin: 10px auto;">CREATE ACCOUNT</div> </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> <div style="display: flex; flex-wrap: wrap; justify-content: center; gap: 10px;"> <div style="width: 45%;"><input type="text" value="First name"/></div> <div style="width: 45%;"><input type="text" value="Last name"/></div> <div style="width: 45%;"><input type="text" value="Birthdate"/></div> <div style="width: 45%;"><input type="text" value="Email"/></div> <div style="width: 45%;"><input type="text" value="Mobile Phone"/></div> <div style="width: 45%;"><input type="text" value="Alternative Phone"/></div> <div style="width: 45%;"><input type="text" value="Street"/></div> <div style="width: 45%;"><input type="text" value="City"/></div> <div style="width: 45%;"><input type="text" value="State"/></div> <div style="width: 45%;"><input type="text" value="Zip Code"/></div> <div style="width: 45%;"><input type="text" value="Country"/></div> <div style="width: 45%;"><input type="text" value="Employer/Organization"/></div> <div style="width: 45%;"><input type="text" value="Role in Household"/></div> <div style="width: 45%;"><input type="text" value="--None--"/></div> </div> <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Submit"/> </div> </div> <p><i>Upon clicking Submit, you may see a picture grid pop up to verify security.</i></p>

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
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

* Confirm New Password

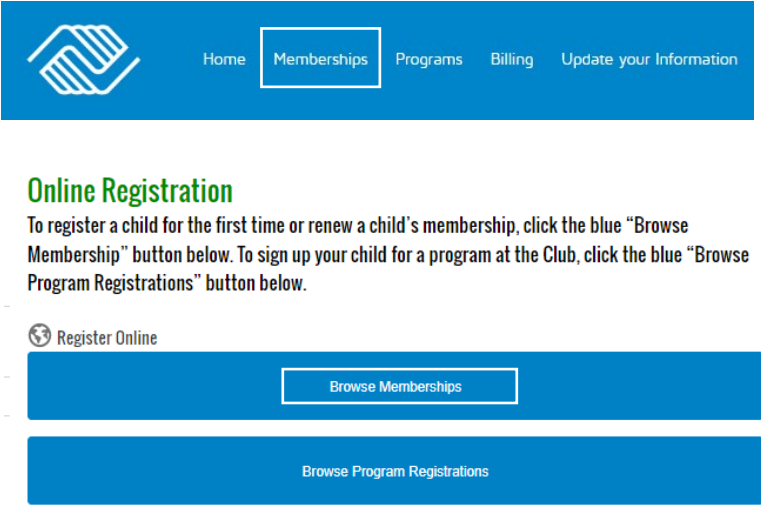
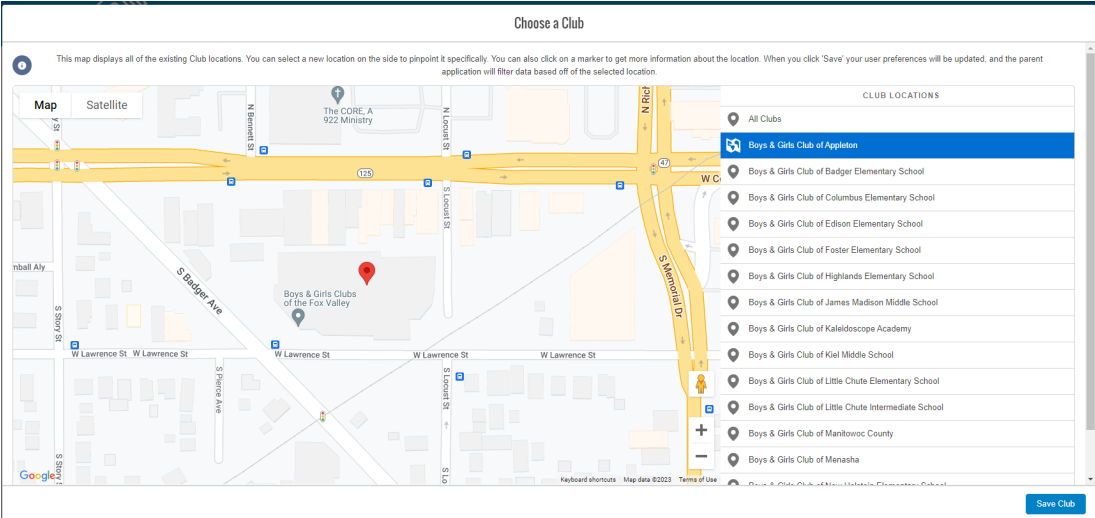
Change Password

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

Now you are logged into the Caregiver Portal homepage!

Adding a Membership

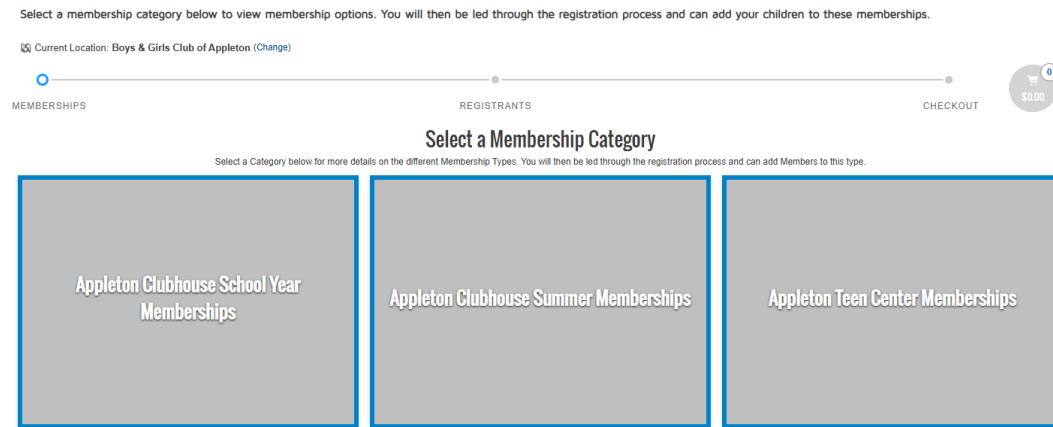
This is a required step for ALL families.

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> <p>Register Online</p> <p>Browse Memberships</p> <p>Browse Program Registrations</p>
2	<p>Select your Club location from the Locations list picker pop up. Click Save Club.</p> <p><i>'All Clubs' location will show by default. Select a specific Club location in the picker to change your default location or choose another Club location.</i></p>  <p>Current Location: Showing Data for All Locations (Change)</p> <p>Choose a Club</p> <p>This map displays all of the existing Club locations. You can select a new location on the side to pinpoint it specifically. You can also click on a marker to get more information about the location. When you click 'Save' your user preferences will be updated, and the parent application will filter data based off of the selected location.</p> <p>Map Satellite</p> <p>CLUB LOCATIONS</p> <ul style="list-style-type: none"> All Clubs Boys & Girls Club of Appleton Boys & Girls Club of Badger Elementary School Boys & Girls Club of Columbus Elementary School Boys & Girls Club of Edison Elementary School Boys & Girls Club of Foster Elementary School Boys & Girls Club of Highlands Elementary School Boys & Girls Club of James Madison Middle School Boys & Girls Club of Kaleidoscope Academy Boys & Girls Club of Kiel Middle School Boys & Girls Club of Little Chute Elementary School Boys & Girls Club of Little Chute Intermediate School Boys & Girls Club of Manitowoc County Boys & Girls Club of Menasha <p>Save Club</p>

3

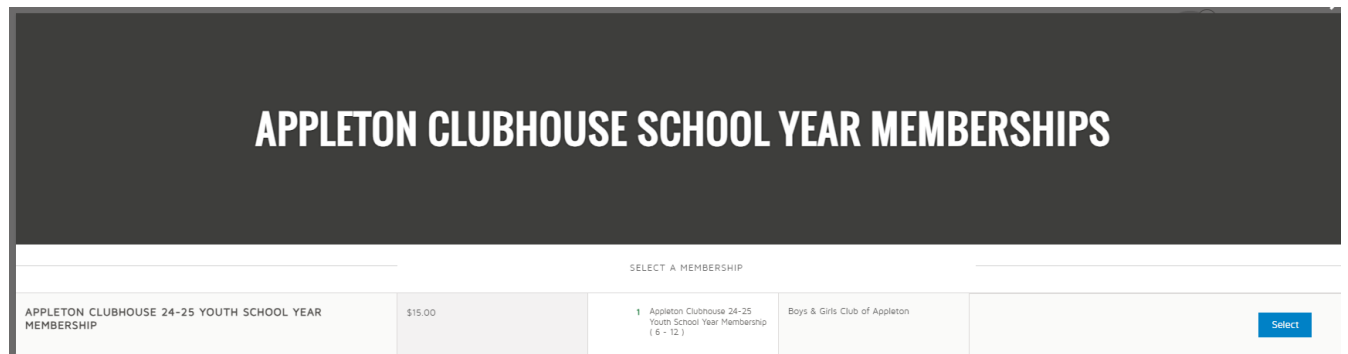
Available Membership Categories for the selected location will display
- **Select the Membership Category** for which you are registering.

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



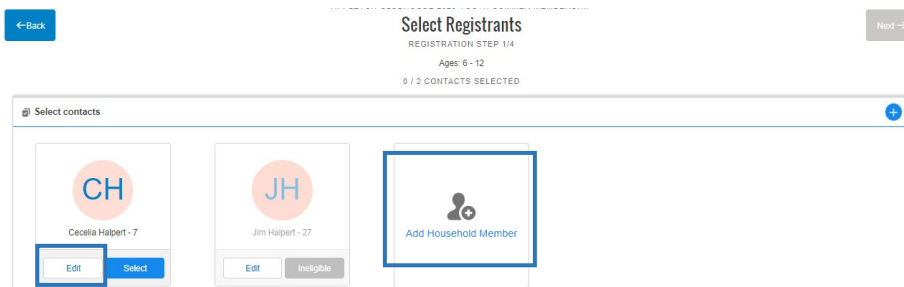
4

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 the pop-up form of the required information.



Create New Contact

Account
Halpert, Jim Household

• First Name • Last Name

• Birthdate • Gender

• Racial Identity • Ethnicity

• Role in Household • Household Income (Used To Determine Fee)

[Save](#)

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 are enrolling in this membership type 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 show Ineligible in grey. For ineligible household members, hover over the ineligible button to see the reason why. There are age restrictions on certain memberships.

MEMBERSHIPS REGISTRANTS CHECKOUT

← Back

APPLETON CLUBHOUSE 24-25 YOUTH SCHOOL YEAR MEMBERSHIP



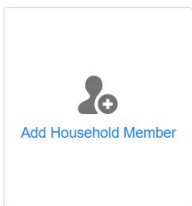
Select Registrants

REGISTRATION STEP 1/3

Ages: 6 - 12

1 / 2 CONTACTS SELECTED

Select contacts

		
---	---	---

Shopping cart: \$15.00

Next →

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.

Note: You must have one additional Emergency Contact/Authorized Pick Up. There are spaces for up to 4 Emergency Contacts & 1 Additional Caregiver.

Helpful Hint: Hold CTRL/CMD + Select options for questions requesting multiple selections (example: on Medical/Allergy Questions)

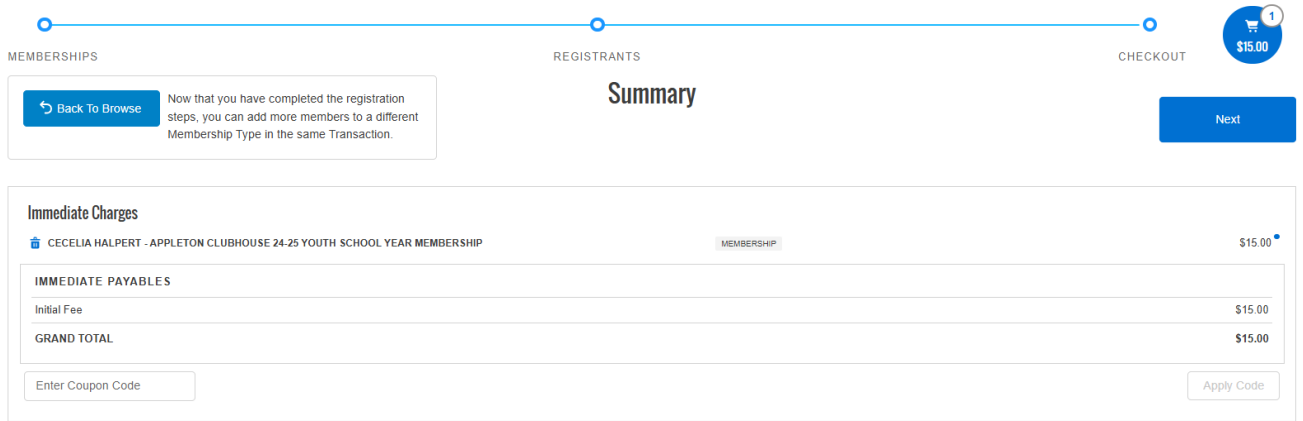
8 Next it will take you to the **Sign Contracts Page**. For each member, you will need to click the **Sign** button, then **Confirm**, then **Complete**. By clicking Confirm and Complete, you agree to the terms described in the materials both on the registration website and the written instructions.

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

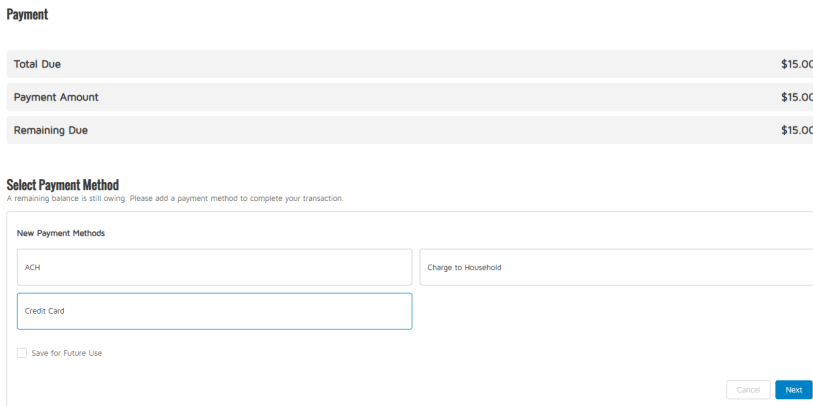
CONTRACT NAME	CONTRACT STATUS	SIGNATURE	LAST MODIFIED	ATTACHMENT	COMPLETED ON	REQUIRED
Cecelia - Acceptance of Family Handbook	Draft	Sign		N/A	N/A	Prior to Purchase
Cecelia - Authorized Pick Up Policy	Draft	Sign		N/A	N/A	Prior to Purchase
Cecelia - Caregiver Release	Draft	Sign		N/A	N/A	Prior to Purchase
Cecelia - 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 fee adjustments for age rules. 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 ACH, Credit Card or Charge to Household.**
Note: By clicking either ACH or Credit Card, you will be prompted to enter your credit card or banking information.



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



- On the Caregiver Portal via credit card or ACH
- In person at our Club locations via cash, check or credit card

If you need additional financial assistance or have questions about the fees being shown, select **Charge to Household** to complete your registration then contact your Club site directly.

Billing Schedules

ONLY for specific sites with Semester Billing, additional options will show on the Payment Screen (ex: Little Chute Elementary during School Year Programming)

Review Future Payments: *Select Payment Method to determine how you would like to pay for the billing schedules.*

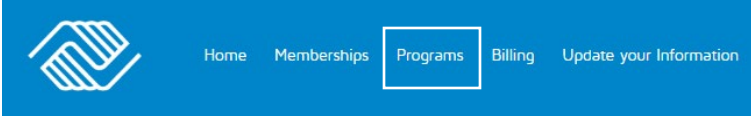
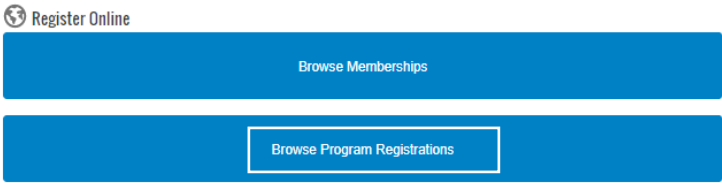
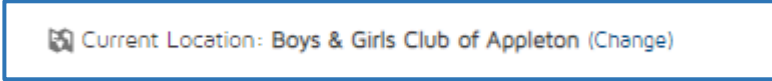
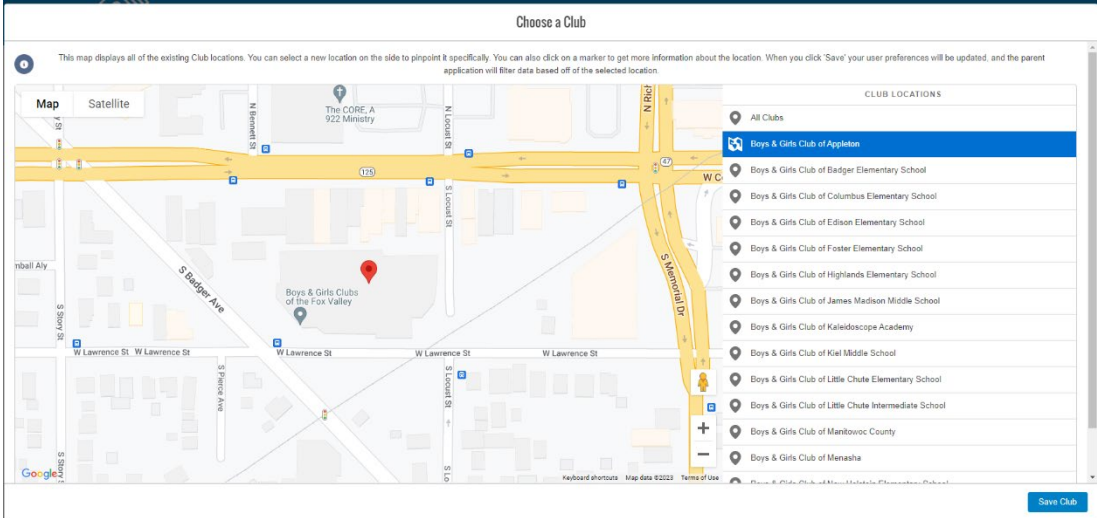
11	<p>A “Complete” message in addition to a green circle with a checkmark indicating the transaction is complete & was processed.</p> <p>There is an option to print your receipt from this screen. Receipts can also be accessed on the Billing tab of the Caregiver portal.</p> <div data-bbox="280 415 490 594" style="text-align: center;"> Complete </div>
12	<p>Once your registration is complete, you will receive a general automatic email confirmation. <i>Check your junk or spam folders.</i></p> <p>Please be aware that you may also receive additional Club specific information from your site directly.</p>

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
1	<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> 
2	<p>Your location will stay filtered from previous transactions. Notice the Current Location filter on the top left. This can be updated by clicking Change to select a different location in the pop up location picker.</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 > Summer Program

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.

4

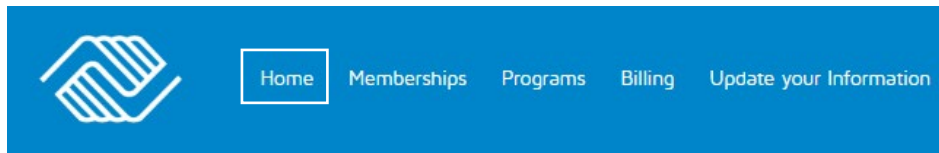
Click **Enroll** on the course option selection you wish to sign up for, then click the blue **Select** button on each member. Click **Save**.

If they are not eligible, it will show Ineligible in grey. For ineligible household members, hover over the ineligible button to see the reason why. Some programs have age restrictions or additional criteria.

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

<p>6</p>	<p>Not all programs have the additional Questions or Contract steps.</p> <p>Answer any Questions associated with the program, then click Next</p> <p>Complete any Contracts associated with the program, then click Next</p>
<p>7</p>	<p>For programs with fees, a Payment Screen will appear:</p> <p>Click either ACH, Credit Card or Charge to Household. <i>Note: By clicking either ACH or Credit Card, you will be prompted to enter your credit card or banking information.</i></p> <div data-bbox="256 621 1284 915" data-label="Form"> <p>Select Payment Method <small>A remaining balance is still owing. Please add a payment method to complete your transaction.</small></p> <div style="border: 1px solid #ccc; padding: 10px;"> <p><small>New Payment Methods</small></p> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;">ACH</div> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;">Charge to Household</div> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 45%; margin-top: 5px;">Credit Card</div> <p><input type="checkbox"/> Save for Future Use</p> <div style="text-align: right; margin-top: 10px;"> Cancel Next </div> </div> </div> <p>If you click Charge to Household, the balance will be added to your household account. This can be paid for later in one of the following ways:</p> <ul style="list-style-type: none"> On the Caregiver Portal via credit card or ACH In person at our Club locations via cash, check or credit card <p>If you need additional financial assistance or have questions about the fees being shown, select Charge to Household to complete your registration then contact your Club site directly.</p>
<p>8</p>	<p>A “Complete” message in addition to a green circle with a checkmark indicating the transaction is complete & was processed.</p> <p>There is an option to print your receipt from this screen. Receipts can also be accessed on the Billing tab of the Caregiver portal.</p> <div data-bbox="315 1457 522 1631" data-label="Image"> </div>

Caregiver Portal Homepage



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

HOUSEHOLD ACCOUNT DETAILS

#1

John Smith

My Details

Personal Email membershiptest8 2@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	

#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.

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

#3

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](#)

Memberships & Registrations

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

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

#4

Enrollments for Smith, John Household

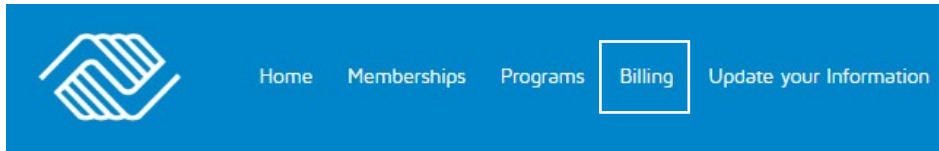
Active Enrollments (1)

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



1. Pay A Balance

Summary of all outstanding items. Use the checkboxes to select the items you wish to pay (edit Payment Amount for partial payments) > Click Next to proceed to a Credit Card or ACH payment.

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

4. Account Statement

Pay A Balance

If you have a balance below, click the green "Pay" button. To pay a partial amount, use the edit pencil to adjust the amount you wish to pay on each outstanding charge.

Make a Payment

Account Details

Account Name: [Redacted] Outstanding Balance: \$600.00

#1

Select Items for Payment [Select All Items](#)

Show selected items only

Items	Contact	Due Date ↑	Original Amo...	Outstanding ...	Payment Am...
<input type="checkbox"/>			\$150.00	\$150.00	\$0.00
<input type="checkbox"/>			\$150.00	\$150.00	\$0.00
<input type="checkbox"/>			\$150.00	\$150.00	\$0.00
<input type="checkbox"/>			\$150.00	\$150.00	\$0.00

Showing 1-4 of 4 Items

Total Amount: \$0.00 [+ Add Credit](#) [Next Step](#)

Scheduled Payments

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

Finance Hub

Account Statement

Statements

#4

Stored Payment Methods

Stored Accounts

#2

[+ New Stored Account](#)

Status	Stored Account Name	ID
Active	[Redacted]	[Redacted]

[Rename](#) [Replace](#) [Delete](#)

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.

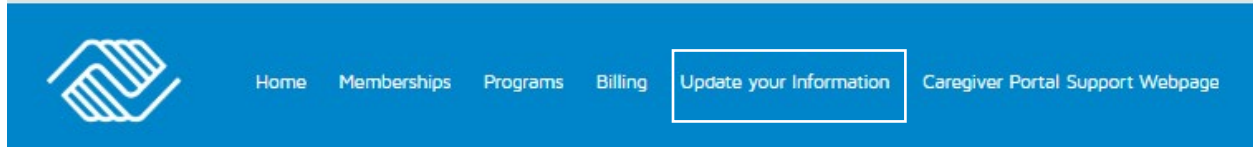
My Previous Transactions
Past 12 Months

Name	Contact	Date	Status	Total Amount	Actions
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Download
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Download
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Download
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Download
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Download

#3

Update your Information

The steps below cover the process to update your child's information (e.g., emergency contact information & authorized pickups) 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