

# Caregiver Portal Resource Guide

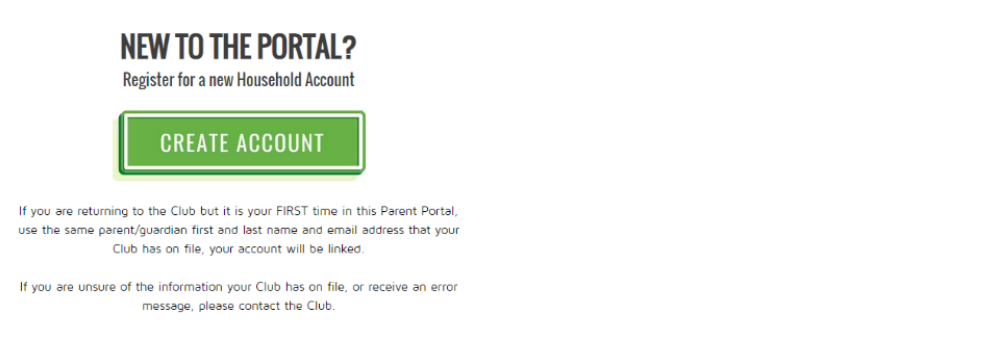
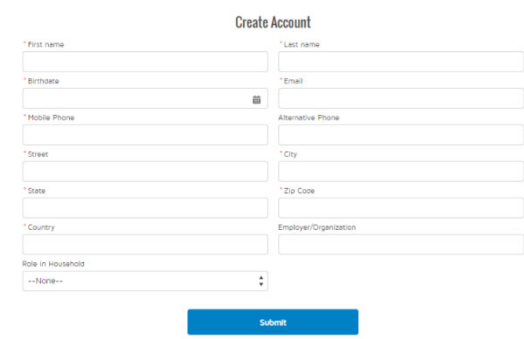
What am I able to do in the Parent Portal?

- Register for memberships, additional programs, pay balances, 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](#).

We will send the Caregiver Portal link out with Caregiver communications but please bookmark this URL for quick access: <https://mch-foxvalley.my.site.com/portal/s/login-home>

## #1 - Creating a Caregiver Portal Account

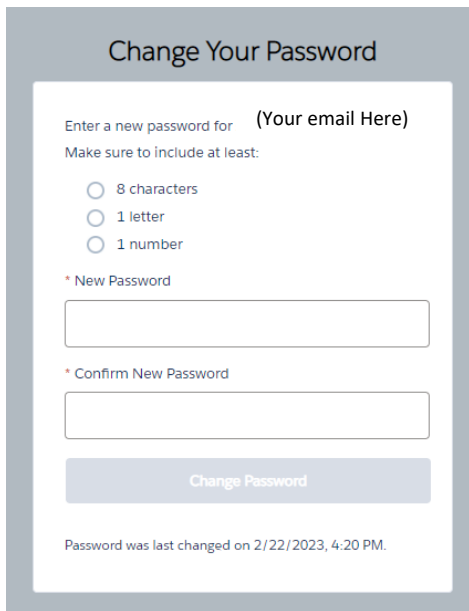
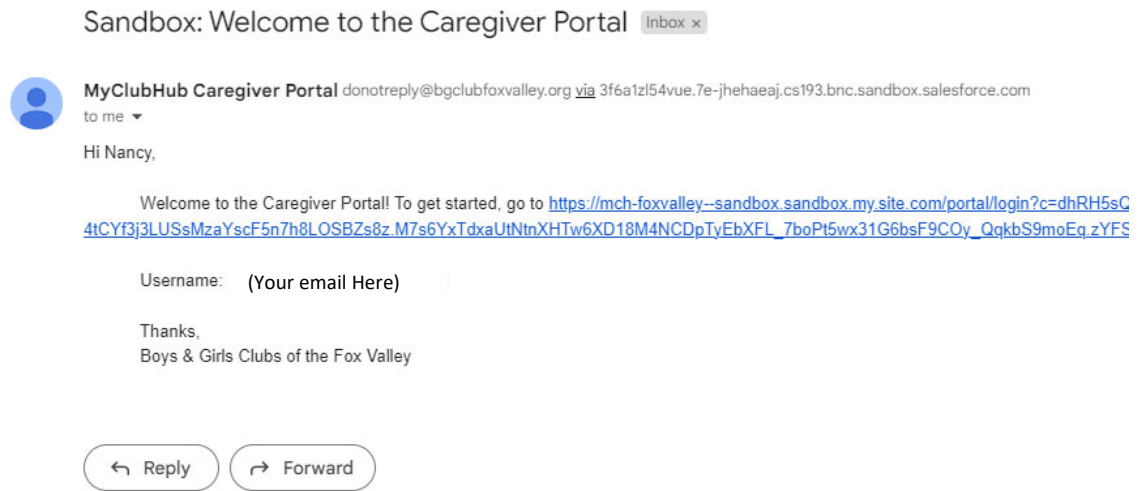
Step	Action
<b>1</b>	<p>Open the <a href="#">Caregiver Portal link</a> and then <b>click CREATE ACCOUNT</b> for all first-time logins.</p> <div style="text-align: center; padding: 20px;">  <p><b>NEW TO THE PORTAL?</b> Register for a new Household Account</p> <p><b>CREATE ACCOUNT</b></p> <p><small>If 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.</small></p> <p><small>If you are unsure of the information your Club has on file, or receive an error message, please contact the Club.</small></p> </div>
<b>2</b>	<p><b>Create Account Screen:</b></p> <p><b>Enter Required Field Information</b> with YOUR information, not the child's</p> <ul style="list-style-type: none"> <li>• Please use the email address we have on file. This will link your account to existing information on file. If you are unsure what email we have on file, please contact us via the support link on the Caregiver Webpage or the Club's Branch or Unit director of the location that your child(ren) attend.</li> </ul> <p><b>Click Submit</b> to create the new account. Please make sure you use a valid email address that you have access to.</p> <div style="text-align: center; padding: 20px;">  <p style="text-align: center;"><b>Create Account</b></p> <p>*First name <input type="text"/> *Last name <input type="text"/></p> <p>*Birthdate <input type="text"/> *Email <input type="text"/></p> <p>*Mobile Phone <input type="text"/> Alternative Phone <input type="text"/></p> <p>*Street <input type="text"/> *City <input type="text"/></p> <p>*State <input type="text"/> *Zip Code <input type="text"/></p> <p>*Country <input type="text"/> Employer/Organization <input type="text"/></p> <p>Role in Household --None--</p> <p style="text-align: center;"><b>Submit</b></p> </div> <p><i>Upon clicking <b>Submit</b>, 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**

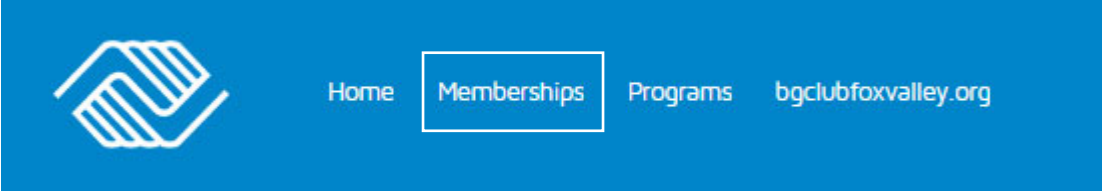
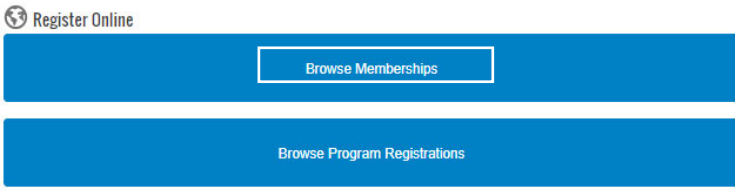
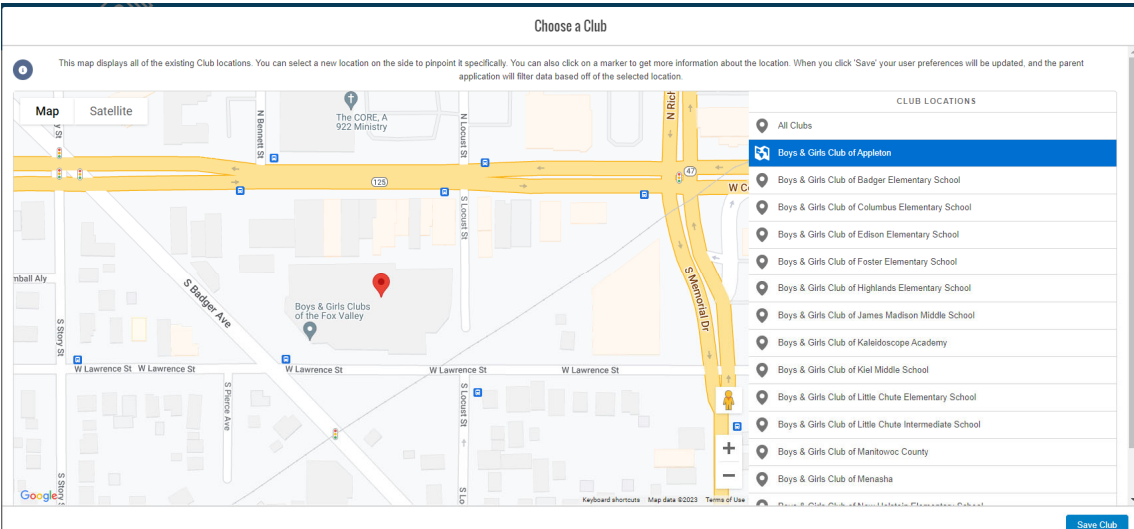
Next, **Create a Password**. Make note that your email address is your username.



Now you are logged into the Caregiver Portal homepage.

## #2 - Adding a Membership

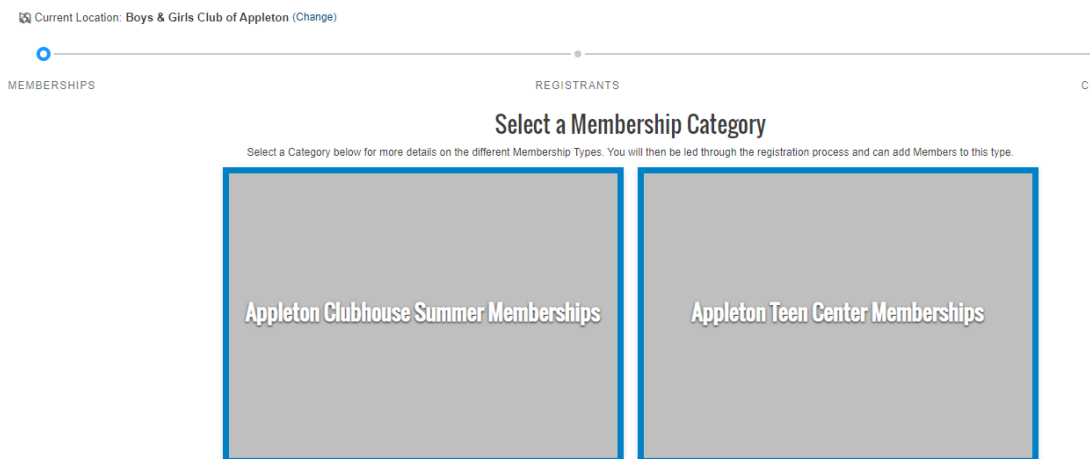
This is a **required** step for ALL families.

Step	Action
1	<p>From the Caregiver Portal homepage, click <b>Memberships</b> across the top banner or scroll down to click the <b>Browse Memberships</b> button below Online Registrations.</p>  <p><b>Online Registration</b> 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 <b>Club location</b> from the <b>Locations</b> list picker pop up. Click <b>Save Club</b>.</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

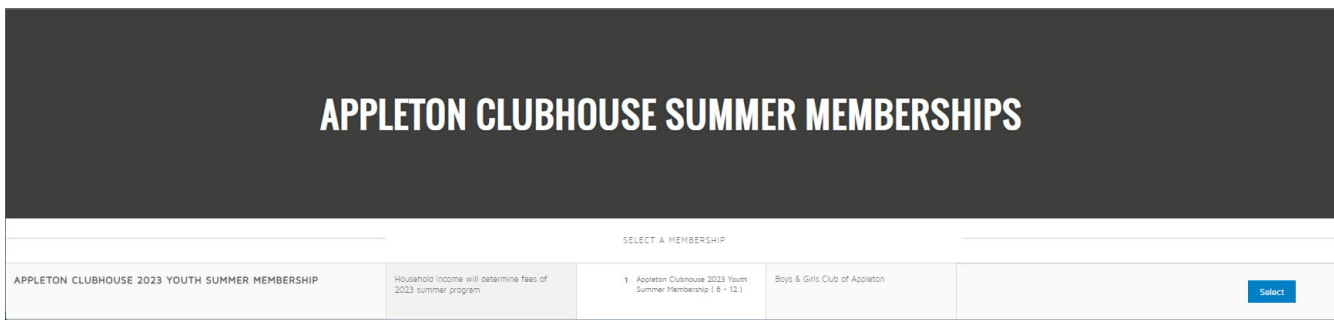
Available Membership Categories for the location selected will display  
- **Select the Membership Category** for which you are registering.

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



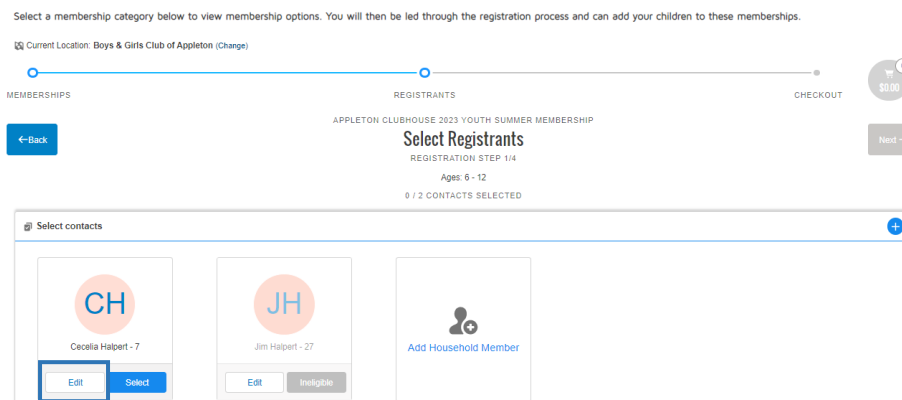
4

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 summer fees 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 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.

Please contact us via the [support form](#) on the **Caregiver Webpage** if you have questions.

Members selected will show a green check box on their contact square. Click **Next** (blue rectangular Next on right of screen)

The shopping cart in the upper right will update to the amount owed.

Please reference the “Fee Information” on the 2023 [Summer Program webpage here](#) for more information about this summer’s fee structure at the Appleton and Menasha branch locations.

Annual Income	Summer 2023 Cost	% Subsidized
<\$27,000	\$60/child	94%
\$27,001 - \$72,000	\$120/child	88%
\$72,001 - \$100,000	\$300/child	70%
\$100,001 - \$125,000	\$600/child	40%
\$125,000+	\$1000/child	0%

## 6 Add Ons

- If your child is also attending one of our school-based summer school sites 6/12-7/7, please select the correct site by clicking **Add**. Once selected they will show on the bottom.
- **If your child is NOT attending one of our school-based summer school sites**, click **Next** to move on with the membership process.

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

MEMBERSHIPS REGISTRANTS CHECKOUT \$500.00

APPLETON CLUBHOUSE 2023 YOUTH SUMMER MEMBERSHIP

**Select Add Ons**  
REGISTRATION STEP 2/4

← Back Next →

CECELIA HALPERT

NAME	AVAILABLE ADD-ONS	PRICE DESCRIPTION
	BGC of Badger Elementary Summer School Program (6/12-7/7)	Add
	BGC of Columbus Elementary Summer School Program (6/12-7/7)	Add
	BGC of Edison Elementary Summer School Program (6/12-7/7)	Add
	BGC of Foster Elementary Summer School Program (6/12-7/7)	Add
	BGC of Highlands Elementary Summer School Program (6/12-7/7)	Add
	BGC of James Madison Middle Summer School Program (6/12-7/7)	Add
	BGC of Kaleidoscope Academy Summer School Program (6/12-7/7)	Add
	BGC of Kiel Middle Summer School Program	Add
	BGC of New Holstein Elementary Summer School Program	Add

NAME	START DATE	END DATE
BGC of Badger Elementary Summer School Program (6/12-7/7)	Jun 5, 2023	Aug 31, 2023

## 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. Some data has been migrated from our old system for existing members, but please review and complete all information on the Membership Question Form for each member. Going forward, most information will be stored in the fields so re-registering will be a quicker process after this first time.

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.

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

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

MEMBERSHIPS REGISTRANTS CHECKOUT \$500.00

APPLETON CLUBHOUSE 2023 YOUTH SUMMER MEMBERSHIP

**Membership Questions**  
MEMBERSHIP STEP 3/4

Please fill the following forms for each member. Required fields have an asterisk \*

Cancel (Close)

**ADDITIONAL CAREGIVER (DO NOT LIST YOURSELF)**

If you need 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

Additional Caregiver Authorized to PickUp?

Additional Caregiver Employer

Emergency Contact 4 Relationship

Emergency Contact 4 Mobile Phone

Emergency Contact 4 Alternate Phone

Emergency Contact 4 Email (Must be an email format e.g., email@domain.com)

Emergency Contact 4 authorized for pickup?

**HOUSEHOLD DEMOGRAPHICS (HOLD CTRL OR CMD (MAC) TO SELECT MULTIPLE ITEMS)**

Member Lives With\*

Physic\*

Member Lives With Other\*

Number of Adults in the household\*

2/08

Does your member use an Epifan?\*

Does your member use insulin?\*

Does your member use an inhaler?\*

Can your member self-administer their own medication?\*

Doctor Name & Phone Number\*

Permission for Treatment by Doctor/Physician\*

Member Medication taken at Club\*

**ALLERGIES (HOLD CTRL OR CMD (MAC) TO SELECT MULTIPLE ITEMS)**

Food Allergies\*

**8** Next it will bring you to the **Sign Contracts Page**. For each child, 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 you may see include Caregiver Release & Acceptance of Family Handbook.

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

MEMBERSHIPS REGISTRANTS CHECKOUT \$600.00

APPLETON CLUBHOUSE 2023 YOUTH SUMMER MEMBERSHIP

← Back Sign Contracts Finish!

REGISTRATION STEP 4/4

CONTRACT NAME	CONTRACT STATUS	SIGNATURE	LAST MODIFIED	ATTACHMENT	COMPLETED ON	REQUIRED
Cecelia - Acceptance of Family Handbook BGC	Draft	Sign		N/A	N/A	Prior to Purchase
Cecelia - Caregiver Release BGC	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.

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

MEMBERSHIPS REGISTRANTS CHECKOUT \$600.00

Summary

Back To Browse Now that you have completed the registration steps, you can add more members to a different Membership Type in the same Transaction. Next

Immediate Charges

JIMMY SMITH - APPLETON CLUBHOUSE 2023 YOUTH SUMMER MEMBERSHIP	MEMBERSHIP	\$1,000.00
Household Income Sliding Scale Adj - 40%	Discount	-\$400.00
BGC of Badger Elementary Summer School Program (6/12-7/7)	Add On	

IMMEDIATE PAYABLES

Initial Fee	\$1,000.00
Discounts	-\$400.00
<b>GRAND TOTAL</b>	<b>\$600.00</b>

Enter Coupon Code Apply Code

*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.

Setup Payment	
<b>1 DUE NOW - DEFAULT</b>	<b>TOTAL DUE NOW</b>
<p>This section has the amounts that are payable today for your purchase. The Make Payment button will allow you to enter your payment information or you can select from any active Stored Accounts that are available for your household.</p>	<b>\$600.00</b>
Cecelia Halpert - Appleton Clubhouse 2023 Youth Summer Membership	\$1,000.00
Household Income Sliding Scale Adj - 40%	-\$400.00
<b>Balance Total:</b>	<b>\$600.00</b>
<a href="#">Pay Now</a>	<a href="#">Bill To Account</a>

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
- Via 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.

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

**Payment Complete**  
Transaction • T-000059

Hi Jim Lion Halpert, thank you for making transaction T-000059 from Community

**RECEIPT**

Email Receipt To  [Send](#) [View or Print Receipt](#)

(Your email Here)

[Return to My Account](#)

12

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

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

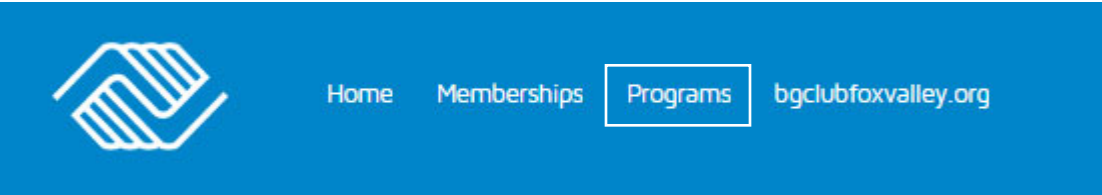
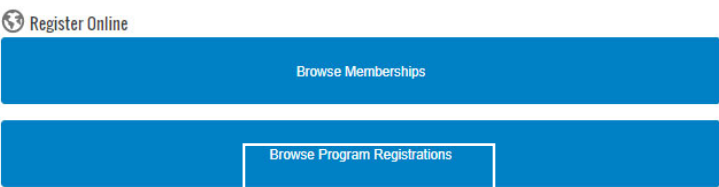

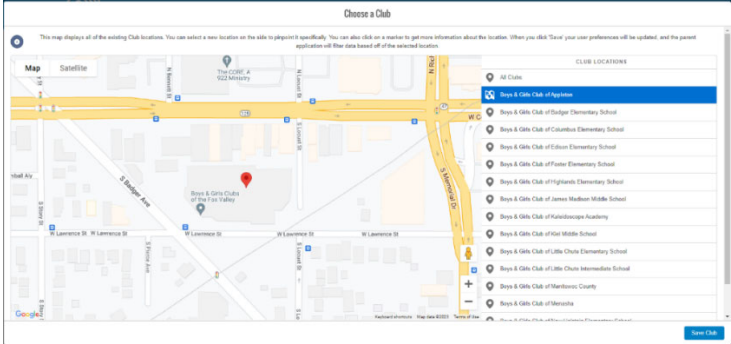


## #3 – Adding a Program Registration

This is an additional step after the Membership completion.

Families new to BGC this Summer will need to sign up for a mandatory New Family Orientation slot.

Additional directed communication will be sent when additional optional program registrations related to targeted programs in literacy, field trips, etc, open up. Some programs require additional reservation to claim a spot due to limited availability.

Step	Action
1	<p>From the Caregiver Portal homepage, click <b>Programs</b> across the top banner or scroll down to click the <b>Browse Program Registrations</b> button below Online Registrations.</p>  <p><b>Online Registration</b> 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 memberships. Notice the Current Location filter on the top left. This can be updated by clicking <b>Change</b> 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.

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

**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

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

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

 Cecelia Halpert - 7 Edit Unselect	 Jim Halpert - 27 Edit Ineligible	 Add Household Member
--	---	--------------------------

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.

The screenshot shows a navigation bar with 'Back', 'Register', 'Questions', 'Contracts', 'Summary', and 'Next' buttons. A shopping cart icon shows '\$0.00' and '09:27'. Below the navigation bar, the current location is 'Boys & Girls Club of Appleton (Change)'. A search and filter sidebar is on the left. The main content area displays a table of course sessions:

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						
Apr 13 '23 - Apr 13 '23 5:30 PM - 6:30 PM Ages 6 to 18 Location: Boys & Girls Club of Appleton						
ENROLL						
APPLETON NEW FAMILY ORIENTATION 2						
Apr 25 '23 - Apr 25 '23 5:30 PM - 6:30 PM Ages 6 to 18 Location: Boys & Girls Club of Appleton						
ENROLL						
APPLETON NEW FAMILY ORIENTATION 3						
May 09 '23 - May 09 '23 6:00 PM - 7:00 PM Ages 6 to 18 Location: Boys & Girls Club of Appleton						
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						

6

Answer any **questions** associated with this program (not all have questions), then click **Next**  
New Family Orientation asks "How many total persons are attending (youth & adults)?"

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.

The screenshot shows a navigation bar with 'Back', 'Register', 'Questions', 'Contracts', 'Summary', and 'Next' buttons. A shopping cart icon shows '\$0.00' and '08:34'. Below the navigation bar, the current location is 'Boys & Girls Club of Appleton (Change)'. The main content area displays a 'Questions' form:

Questions  
Please select a Contact

Cecelia Halpert

NEW FAMILY ORIENTATION

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

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.

Back Register Questions Contracts Summary Finish \$0.00 8:05

### Summary

Total Registrations: 1 \$0.00 Details

Item 1 - Enrollment


<b>New Family Orientation - Appleton New Family Orientation</b>		
Registration Reg-00009	Type Enrollment	Attendee Cecelia Halpert
Start/End Date Apr 13, 2023 / Apr 13, 2023	Program New Family Orientation	Course Appleton New Family Orientation
<b>Enrolled Course Options</b>		
Course Option Name Appleton New Family Orientation 1	Start/End Date Apr 13, 2023 / Apr 13, 2023	Duration 5:30 PM / 6:30 PM

Finish

8

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

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

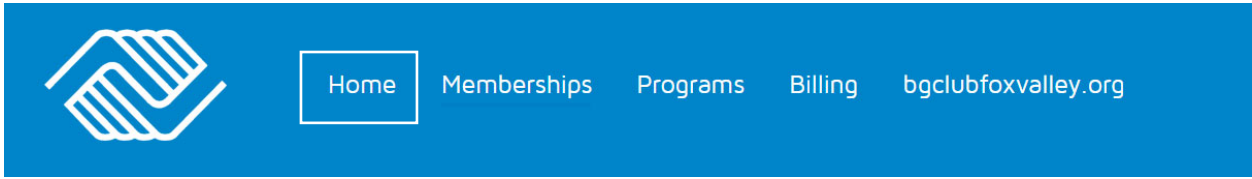
 **Payment Complete**  
Transaction • T-000059

Hi Jim Halpert, thank you for making transaction T-000059 from Community

RECEIPT

Email Receipt To

# #4 - Caregiver Portal Homepage



## HOUSEHOLD ACCOUNT DETAILS

**#1**

### My Details

Personal Email: membershipstest82@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

**#4**

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

### Memberships & Registrations

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

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)

## #5 – Caregiver Portal Billing

[Home](#)[Memberships](#)[Programs](#)[Billing](#)[bgclubfoxvalley.org](#)

### Household Billing Details

#### Pay A Balance

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

#5

#### Account Primary Contact: John Smith

Account Balance: \$600.00

[Pay All](#)

#### Optional Date Filtering

Start Date  End Date  [Apply Date](#) [Clear Date](#)  
[Filter](#) [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	<a href="#">✎</a>

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.

#6

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

#7

#### 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	<a href="#">⚙</a>	
T-000069	John Smith	Feb 22, 2023	Close	\$600.00	<a href="#">⚙</a>	
Show More			2/2 visible		Show Less	

5. Pay a Balance

6. Store Credit Card Accounts

7. Recent Transactions

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](#).