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Member Tracking System – Parent Portal

Listed below is an outline of the Parent Portal, what it includes, requirements and costs.

Here is a brief 5 minutes overview: <https://vimeo.com/158641894> and here is a 2 minute video about the newest Portal feature, the shopping cart <https://vimeo.com/227770442> .

Parent Portal

The Parent Portal is a full featured website that integrates with your Member Tracking System. Parents can enter data for members, contacts, household, general and enrollment-related member information inside your Member Tracking System directly from the website. Data is monitored by club staff instead of being managed by club staff.

Parents can:

- Enroll children in services (as well as withdraw also from some service types)
- Update child information including medical and more
- Manage child contacts (including who can pick up each child)
- View account balance, status, and history
- Make payments and manage credit/debit card information
 - Credit card information is not stored inside Member Tracking System, it is stored with USAePay
- Print payment history for tax purposes

You and your staff can:

- Monitor all data entry performed by parents
- Enjoy the time saved now that parents are doing most of the data entry for you!
- Empower the parents to enroll their children at a convenient time of their choosing
- Give the parents up to date account information and automated payment options

Requirements

- Windows Server 2008 R2 or Higher – size and capabilities appropriate to the number of users in your organization
- Remote Desktop Services with proper user licensing for remote access to the server
- Microsoft SQL Server 2012 or Higher
- Microsoft Office Professional 2010 or Higher with proper user licensing
- Web Server with IIS (Internet Information Services) 7 or above
- USAePay account – send VAR Sheet to Vision to set this up
- Domain Registration for your Parent Portal
- SSL Certificate which encrypts your web site communication
- These requirements can be hosted on either one, two or three servers depending on your needs

Parents sign up for services, they can setup a credit card payment plan which is a set amount each month or week. The payments are processed automatically through the USAePay account.

Someone on your staff would process the payments into MTS on a regular basis. That includes pulling a batch report from USAePay, matching the payments for each member and processing it into MTS through a batch import screen.

The costs associated with the Parent Portal are:

- USAePay account \$74.95 setup and \$20/monthly fee
- Domain Registration could range between \$5 and \$25 per year
- Standard SSL Certificate for one website from GoDaddy.com \$69.99 per year
- If your Member Tracking System™ database is currently an Access database, it must be upsized to an SQL database and there is a one-time charge for this process of \$1,000 (Discounted from \$1,500 for non Portal clients)
- Annual Fee to Vision based on average number of members enrolled in the organization for the last 3 years * \$0.50 Example:
 - Enrolled 1-1-15 to 12-31-15 = 1500
 - Enrolled 1-1-16 to 12-31-16 = 1600
 - Enrolled 1-1-17 to 12-31-17 = 1700
 - Total = 4800 / 3 = 1600 average
 - 1600 * \$0.50 = \$800 / year

The preparation, installation, training and setup for the Portal require a **minimum** of 3-6 weeks before it will be live and can take longer, depending on how promptly we receive all of the required information and prerequisites from your club, how much time your staff have to devote to training and initial setup, and how complicated your services and fee structures are. Please be aware of this when establishing a timeline.

You can view our in depth training webinar at <https://vimeo.com/92730753>