

# Portal User Guide



# Portal User Guide

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# Club Excellence

## Introduction

Club Excellence is an online portal system designed to give approximately 1,500 youth USA Hockey associations a unique home to drive organizational success. The portal walks youth hockey leadership through the day-to-day tasks of running a youth hockey association, and provides resources to assist in delivering the best youth sport option to the community.

This manual is designed to help users navigate their association's portal.

## Gain Access

To gain access to the portal, the local association's President or Vice President must first sign up at <http://www.usahockey.com/clubexcellence>. The registrant will then be confirmed by USA Hockey. Once confirmed, the user will receive an email confirmation from [system@portal.usahockey.com](mailto:system@portal.usahockey.com) with additional information to log in to the system.

If a user cannot select their association from the registration page, the association has already been claimed.

If an association is not listed, contact [ClubExcellence@usahockey.org](mailto:ClubExcellence@usahockey.org) to request that it be added.

## Invite Users

Users may invite other currently serving board members to join Club Excellence. There are currently nine standard roles available: President, Vice President, Secretary, Treasurer, Hockey Development Coordinator, 8U Growth Coordinator, Registrar, Player Safety Coordinator and SafeSport Coordinator. Each member has a job description, monthly tasks and a resource center with quick reference templates & best practice guides for their position.

Note that the 8U Growth Coordinator's primary task is the 2 and 2 Challenge, so the majority of their time will be spent completing tasks in the 2 and 2 Challenge section of their portal.

Prior to inviting users, consider these tips:

- If users already have a portal account (i.e. registry, 2 & 2 Challenge, Try Hockey for Free), use the email address associated with that account
- Please confirm board members' preferred email addresses prior to adding them to Club Excellence
- Consider using position specific association email addresses within your association; for example, [registrar@yourassociation.com](mailto:registrar@yourassociation.com) or [associationregistrar@provider.com](mailto:associationregistrar@provider.com). This will help maintain the association's history in the portal when that email address is passed on to the next individual serving.
- We recommended that users do not use a work email address (unless that address is tied to their association in some way, i.e. a registrar works at their association's ice rink)
- If an email address associated with a portal account needs to be updated, please contact [clubexcellence@usahockey.org](mailto:clubexcellence@usahockey.org)

To add/invite a member:

1. Go to the Club Excellence tab and select Manage Users
2. Click Add Member
3. Enter the member's information
4. Click Add Member. This will trigger an email to the new user to let them know that they can access the association's portal.

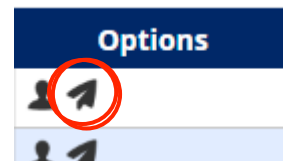
## Edit User

Be sure that the information entered is accurate. If there is a mistake in a user's name, phone number or email address, contact [ClubExcellence@USAHockey.org](mailto:ClubExcellence@USAHockey.org).

To remove a user, first clear them from the seat(s) they hold on the board. Then click the “-” icon located on the Board Members page.

## Send a Login Reminder

1. Select 'Manage Users' in the navigation on the left of the Club Excellence page
2. Click the paper airplane button next to the user who will receive the reminder
3. Confirm that you want to send the reminder by clicking OK



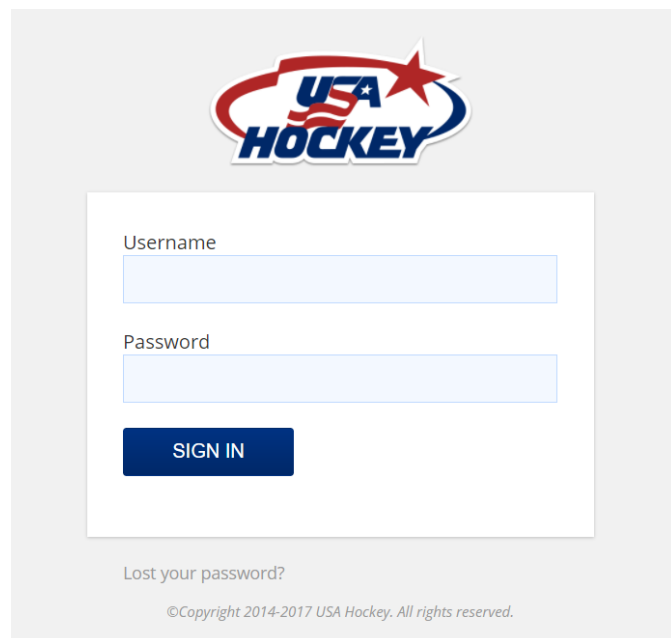
## Getting Started

### Recommended Browsers:

Device	Recommended Browser(s)
Windows 7	Chrome, Firefox
Windows 8	Chrome, Firefox
Windows 10	Edge, Chrome, Firefox
Mac OS X 10.8	Firefox
Mac OS X 10.9	Chrome, Firefox
Mac OS X 10.10	Safari, Chrome, Firefox
Android Tablet	Chrome
Android Phone	Chrome
iPad	Safari, Chrome
iPhone	Safari, Chrome

### User Login Page:

<https://portal.usahockey.com/tool/login>



# Navigation

## HOME Page



[Sign Out](#)

[Home](#) [Club Excellence](#) [Tasks](#) [Events](#) [Resource Center](#)

### Club Excellence News & Notes

#### Welcome to the 2017-2018 season!

Your task list has been cleared to give you a fresh start to the season.

Thank you for your commitment to youth hockey! If you have any questions, please contact us at [ClubExcellence@usahockey.org](mailto:ClubExcellence@usahockey.org).



The purpose of the Club Excellence program is to equip your youth hockey association boards with the knowledge and tools necessary to achieve this goal. As a leader of your association, utilize the resources, structure, and protection available within this portal to help create the best possible environment for your athletes, coaches, parents, and officials.

If you have any questions about this portal and its content, please contact Kevin Erlenbach at (719) 538-1119 or [ClubExcellence@usahockey.org](mailto:ClubExcellence@usahockey.org).



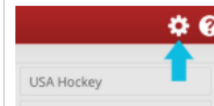
Quick



User

#### PASSWORD TIP

You can change your password at any time. To change your password go to the settings screen.



You will see a form to change your password. Just enter your current password along with the new one you want. Your new password must be at least 8 characters long. Remember all passwords are case sensitive.



[Get Adobe Reader](#)

## CLUB EXCELLENCE Page

Access information about current board members, manage users, and learn more about what it means to be



[Sign Out](#)

Home Club Excellence Tasks Events Resource Center



Board Members

Manage Users

Manage Tasks

USA Hockey Proud

### MICHIGAN AHA

Position	Last Name	First Name	Progress	Options	Position Options
President	Greenman	Patrick	<div><div></div></div>		N/A
Vice President	Abbott	John	<div><div></div></div>		N/A
Hockey Development Coordinator	Bonish	Mike	<div><div></div></div>		N/A
8U Growth Coordinator	Gibson	Andy	<div><div></div></div>		N/A
Treasurer	Spencer	Jayne	<div><div></div></div>		N/A
Secretary			<div><div></div></div>		N/A
SafeSport Coordinator	Spencer	Jayne	<div><div></div></div>		N/A
Registrar			<div><div></div></div>		N/A
Player Safety Coordinator	Margarucci	Kevin	<div><div></div></div>		N/A
Goaltending Development Coordinator	Osaer	Phil	<div><div></div></div>		N/A

Create a new position

USA Hockey Proud.

**'Create a new position'** button- this allows the administrator to create a custom position for their board.

1. Click 'Create a new position'
2. Enter a Position Name and Description. Click Submit.
3. Once the custom position is created, a member can be assigned to the role
4. A custom position can be edited by clicking the pencil icon in the Position Options column
5. A custom position can be removed by clicking the "-" icon in the Position Options column

**Left navigation:**

Left **Board Members**

*Options:*

- Person icon – contact information
- Person icon with a "+" – assign member to a position
  - i. Multiple people may be assigned to a position. People sharing a role will also share a single set of tasks; tasks cannot be assigned to an individual.
- Person icon with "-" – remove member from position
- Envelope icon – send the user an email
- "i" icon – job description
- Person icon with a "-" – remove member from a position

*Progress:*

Options

First Name	Progress	Options
Patrick	<div><div></div></div>	
John	<div><div></div></div>	
Mike	<div><div></div></div>	
Andy	<div><div></div></div>	
Jayne	<div><div></div></div>	
Karen	<div><div></div></div>	
Dominic	<div><div></div></div>	
	<div><div></div></div>	

The green bar indicates total progress on tasks. Progress on individual tasks can be tracked by clicking on an individual's progress bar. The user will then see the task list with items marked as complete or incomplete.

## ii. Manage Tasks

Manage Tasks							
<input type="text"/>							
Date	Type	Role	Description	Show Task	Custom Task	Options	
Pre-Season	Hockey Development	President	Review your association's 8 & Under participation totals and understand your <a href="http://www...	<a href="#">Yes</a>	No		
Pre-Season	Hockey Development	President	A growing base of 8U participants is a strong indicator of the long-term health of an organization. ...	<a href="#">Yes</a>	No		
Pre-Season	Hockey Development	President	Connect with the Hockey Development Coordinator and Growth Coordinator to evaluate your transitional...	<a href="#">Yes</a>	No		
Pre-Season	Hockey Development	President	Chances are that you have heard a lot about the American Development Model (ADM), USA Hockey's playe...	<a href="#">No</a>	No		
				<a href="#">Yes</a>	Yes		
				<a href="#">Yes</a>	Yes		

### Columns

- Date- the month or date in which the task is due
- Type – the category the task falls under
- Role – the role responsible for completing the task
- Description – the start of the task's description
- Show Task – this column indicates if a task will show on a user's task list (Yes), or if it will be hidden from view (No)
- Custom Task – this column indicates if the task is custom (Yes) or not (no)
- Options
  - Eye icon – view task
  - Pencil icon – edit task
  - “-” icon – remove task

Add Custom Task – create a custom task

Create Task

File Information

Role:

Type:

Short Description:

Full Details (read more):

Due Date

Type:

ADD TASK

### iii. Manage Users



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[Tasks](#)
[Events](#)
[Resource Center](#)

## Manage Users

Last Name	First Name	Position(s)	Email	Options
Abbott	John	Vice President	npteam+vicepresident@neuralplanet.com	
Barnett	Todd	Secretary	npteam+secretary@neuralplanet.com	
Bonish	Mike	Hockey Development Coordinator	npteam+hockeydev@neuralplanet.com	
Drake	Gary	SafeSport Coordinator	npteam+safesport@neuralplanet.com	
G	Dominic	Growth Coordinator	dom@dmafx.com	
Greenman	Patrick	President	npteam+president@neuralplanet.com	
Hodge	Kelly	Registrar	npteam+registrar@neuralplanet.com	
Planet	Neural		npteam@neuralplanet.com	
Spencer	Jayne	Treasurer	npteam+treasurer@neuralplanet.com	

Add Member

**THIS IS USA HOCKEY**

USA Hockey provides the foundation for the sport of ice hockey in America; helps young people become leaders, even Olympic heroes; and connects the game at every level while promoting a lifelong love of the sport.

As an association of USA Hockey, here are our core values to guide you with your planning, programming and play, both now and in the future.

**SPORTSMANSHIP** - Foremost of all values is to learn a sense of fair play. Be humble in victory, gracious in defeat. We foster friendship with teammates and opponents alike.

**RESPECT FOR THE INDIVIDUAL** - Treat all others as you expect to be treated.

**INTEGRITY** - We seek to foster honesty and

#### Options:

- Person icon – contact information
- Paper airplane icon – send a login reminder
- Add Member button – add a user to the association’s portal
  - The Contact Information will be available to the board
  - The user may be assigned to a role that has not yet been assigned
  - Once a member is added, they will be sent an email with information on accessing the Portal

### iv. USA Hockey Proud – learn more about what it means to be a USA Hockey association



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## USA Hockey Proud

USA Hockey provides the foundation for the sport of ice hockey in America; helps young people become leaders, even Olympic heroes; and connects the game at every level while promoting a lifelong love of the sport.

To help you understand what it means to be USA Hockey Proud, please review the below reference documents.

- [This is USA Hockey](#) - this document will help explain what USA Hockey represents as you continue to carry out our mission.
- [USA Hockey Structure](#) - this document will help you better understand how ice hockey is structured to improve the delivery of our sport.
- [Benefits of Being a USA Hockey Association](#) - USA Hockey ensures that you and your volunteers are kept safe from accidents and protects you from criminal acts and lawsuits. This document gives a general overview of everything available to you as a USA Hockey association.

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**RESPECT FOR THE INDIVIDUAL** - Treat all others as you expect to be treated.

**INTEGRITY** - We seek to foster honesty and fair play beyond mere strict interpretation of the rules and regulations of the game.

**PURSUIT OF EXCELLENCE** - Each member of the organization, whether player, volunteer or staff, should seek to perform each aspect of the game to the highest level of his or her ability.

**ENJOYMENT** - It is important for the hockey experience to be fun, satisfying and rewarding for all participants.

**LOYALTY** - We aspire to teach loyalty to the ideals and fellow members of the sport of hockey.

**TEAMWORK** - We value the strength of learning to work together. The use of teamwork is reinforced and rewarded by success in the hockey experience.



## TASKS Page

Tasks are organized on a monthly basis. Users can track their progress from Preseason to Postseason as they check tasks. The green progress bar (below the title of each month) will expand as tasks are completed/checked.

Home Club Excellence Tasks Events Resource Center

Board Members  
Manage Users  
USA Hockey Proud

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**Preseason**

**President**

**Hockey Development**

- ☒ Review your association's 8 & under participation totals and understand your [2 and 2 Challenge goals for the upcoming season](#)
- ☒ Connect with the Growth Coordinator to make sure the association is registered to participate in the [2 and 2 Challenge](#)
- ☒ Connect with the President to evaluate your transitional programming that will take a Try Hockey for Free participant to an association member
- ☐ Have the board review the American Development Model resources in their portal and reinforce the message that your association is committed to providing the best local youth sport option
  - Hockey Development Resource Center documents**
    - ADM Guide
    - ADM Talking Points
    - Coaching Education Program Overview
- ☐ Connect with the Hockey Development Coordinator and the board to review Tryout protocol
  - Review Tryout policies
  - Make sure it matches with what is posted in your bylaws
  - Set a plan for communication with parents over the selection process
  - Determine which board members will be involved at each level with player placement
- ☐ Develop a stronger relationship with the local officiating association
  - Review the Hockey Development Resources Center document "Hockey Associations Relationships with Officiating Groups"
  - Meet with the leadership of the local officiating association to build a working relationship
  - Invite a member of the officiating association board to join your board to increase collective efforts

## EVENTS Page


Create events and/or meetings for the board, and track attendance.

Home Club Excellence Tasks Events Resource Center

Board Members  
Manage Users  
USA Hockey Proud

THIS IS USA HOCKEY

**My Events & Meetings**

Date	Name	Status	Start Time	End Time	Options
9/1/2016	Event Name	Owner	6:00:00 PM	7:00:00 PM	

Create Event

### Create an event:

1. From the Events page, click Create Event
2. Enter information for the event in the pop up box (Name, Start Time, End Time, Description)
3. Click Add Event

### Delete an event:

1. Only the event owner may delete the event.
2. From the Events page, click the “-“ icon
3. Click OK to confirm the deletion

## Calendar Icon – event details page

Home Club Excellence Tasks Events Resource Center

Edit Event

### Event Name

9/1/2016 6:00:00 PM - 7:00:00 PM

Event Description . . .

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RESPECT FOR THE INDIVIDUAL - Treat all others as you expect to be treated.



INTEGRITY - We seek to foster honesty and fair play beyond mere strict interpretation of the rules and regulations of the game.

PURSUIT OF EXCELLENCE - Each member of the organization, whether player, volunteer

### Invited Participants

Bonish	Mike	DECLINED
G	Dominic	INVITED
Greenman	Patrick	ACCEPTED

### Event Resources (1)





Name	File Type	Options
User Manual	PDF	 

Add Resource

## Invite Participants to an event

1. On the event details page, click the paper airplane icon in the top right corner of the Invited Participants box (see above image)
2. Select members by clicking the person icon. Selected participants will be added below the green Selected Members section
3. Click Invite

### Select Members

Last Name	First Name	
Abbott	John	
Barnett	Todd	
G	Dominic	
Planet	Neural	

SELECTED MEMBERS

Last Name	First Name
-----------	------------

INVITE

**Track members** who plan to attend on the event details page Invited Participants box. Invited participants will show an invited, accepted or declined status.

### Invited Participants

Bonish	Mike	ACCEPTED
Drake	Gary	INVITED
Greenman	Patrick	ACCEPTED
Hodge	Kelly	INVITED
Spencer	Jayme	DECLINED

in the

## Add a Resource for the event

1. On the event details page, click Add Resource
2. Enter a Display name
3. Click Choose File to select a file to upload
  - a. The file name should include the file extension (.pdf, .docx, etc.)
4. Click Save Resource

### Add Resource

File Information

Display Name:

File:  No file chosen

## Update Invitation Status

1. On the event details page, click the pencil icon

### Edit Invitation Status

Current Status: ACCEPTED

Status:

2. Select a status (Accept/Decline) from the dropdown menu
3. Click Update Status

## Resource Center

All the documents users may need to help their association have a successful youth hockey season broken into sections based on the user's role:

- Hockey Development
- Parent Development
- Governance
- Financial
- Affiliate
- Coach Development
- Communication
- Budget

## Additional Assistance

### Contact:

[ClubExcellence@USAHockey.org](mailto:ClubExcellence@USAHockey.org)

Brittany Bobak

(719) 576-8724 ext. 102

[Brittany.Bobak@USAHockey.org](mailto:Brittany.Bobak@USAHockey.org)

Kevin Erlenbach

(719) 576-8724 ext. 119

[KevinE@USAHockey.org](mailto:KevinE@USAHockey.org)

## Portal Suggestions and/or Concerns

Click the question mark on the right side of the navigation bar to Make a Suggestion or Report an Issue.



[Sign Out](#)

Home Club Excellence Tasks Events Resource Center

