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. If a user cannot select their association from the registration page, the association has already been enabled. If an association is not listed, contact ClubExcellence@usahockey.org to request that it be added.

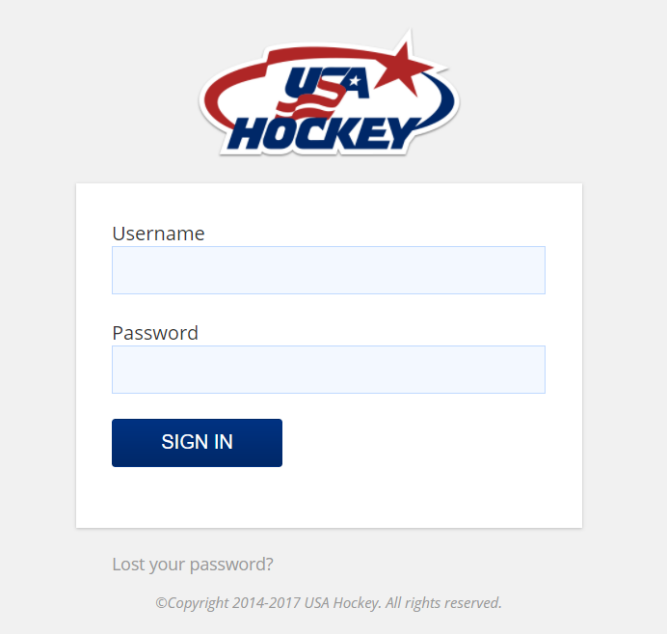
The registration will then be processed by USA Hockey's membership development team. Once completed, the user will receive an email confirmation from system@portal.usahockey.com with additional information to log in to the system. The email sent to a new portal user will include first time login information, including a temporary password. An existing portal user will receive email confirmation that they have been added to an association's Club Excellence portal.

Recommended Browsers & Login Page

Recommended Browsers:

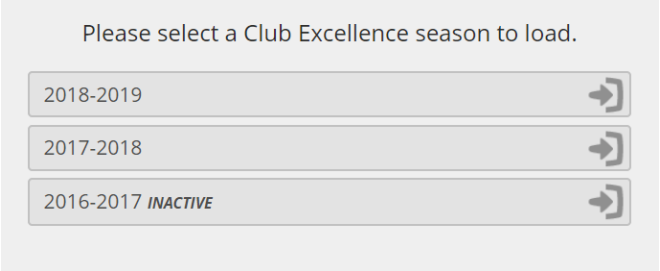
Device	Recommended Browser(s)
Windows 7	Chrome, Firefox
Windows 8	Chrome, Firefox
Windows 10	Edge, Chrome, Firefox
Mac OS X 10.8	Firefox
Mac OS X 10.9	Chrome, Firefox
Mac OS X 10.10	Safari, Chrome, Firefox
Android Tablet	Chrome
Android Phone	Chrome
iPad	Safari, Chrome
iPhone	Safari, Chrome

User Login Page:
https://portal.usahockey.com/tool/login



Season selection

Club Excellence supports multiple seasons.

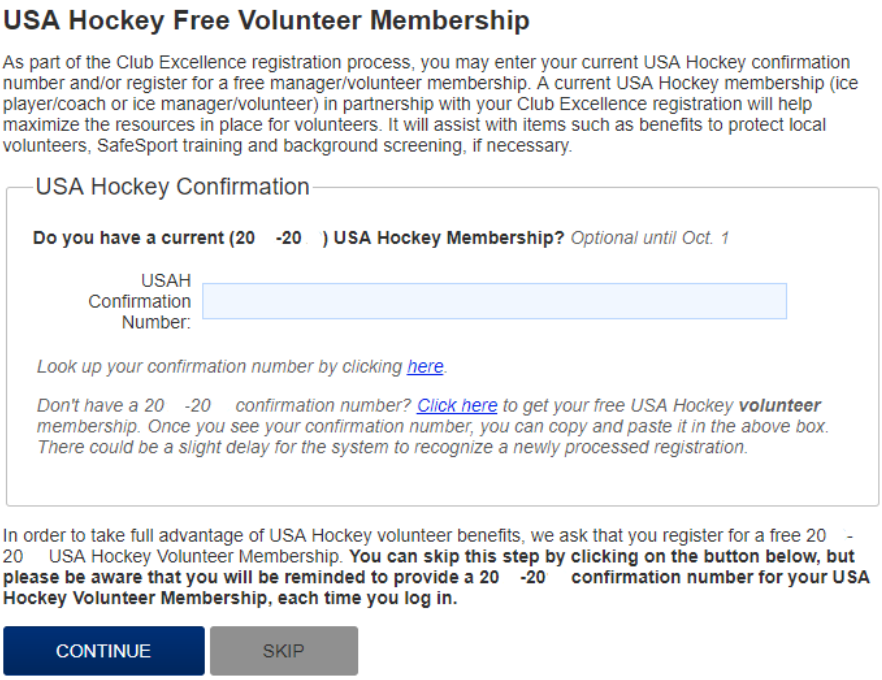


Past seasons are noted as "Inactive". Inactive seasons are read-only, so users can see previous member lists, positions, task lists, and task completion.

Active seasons are the current and/or new season. The newest season will become available once an association's administrator has renewed their commitment to Club Excellence.

Membership / Confirmation Number

Users will be asked to enter their USA Hockey membership/confirmation number. Current Ice Player / Coach (paid membership) and Ice Managers / Volunteers (free membership) registrations will be accepted. Users can get a membership and/or retrieve their current number at USAHockeyRegistration.com.



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 or associationregistrar@provider.com.
- We recommended that users do not use a work email address (unless that address is tied to a current portal account or it is connected to their association in some way, i.e. a registrar works at their association's ice rink)
- If an email address/username needs to be updated, please contact 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.

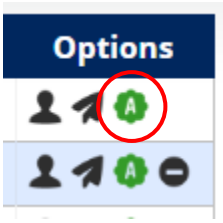
Send a Login Reminder

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

3rd Admin

An association's President and/or Vice President may assign a board member as a 3rd admin. This individual will gain the same administrative rights (adding/removing members, assigning positions, renewing, etc.) as the President and Vice President. The assignment will stay with the user, so if that individual changes positions, they will retain the rights.

To assign 3rd Admin rights:



1. Go to the Club Excellence tab and select Manage Users
2. Click the green "A" icon
3. Confirm your selection by clicking OK

Note: 3rd admin rights may not be removed, but they can be reassigned

Edit and/or Remove Users

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.

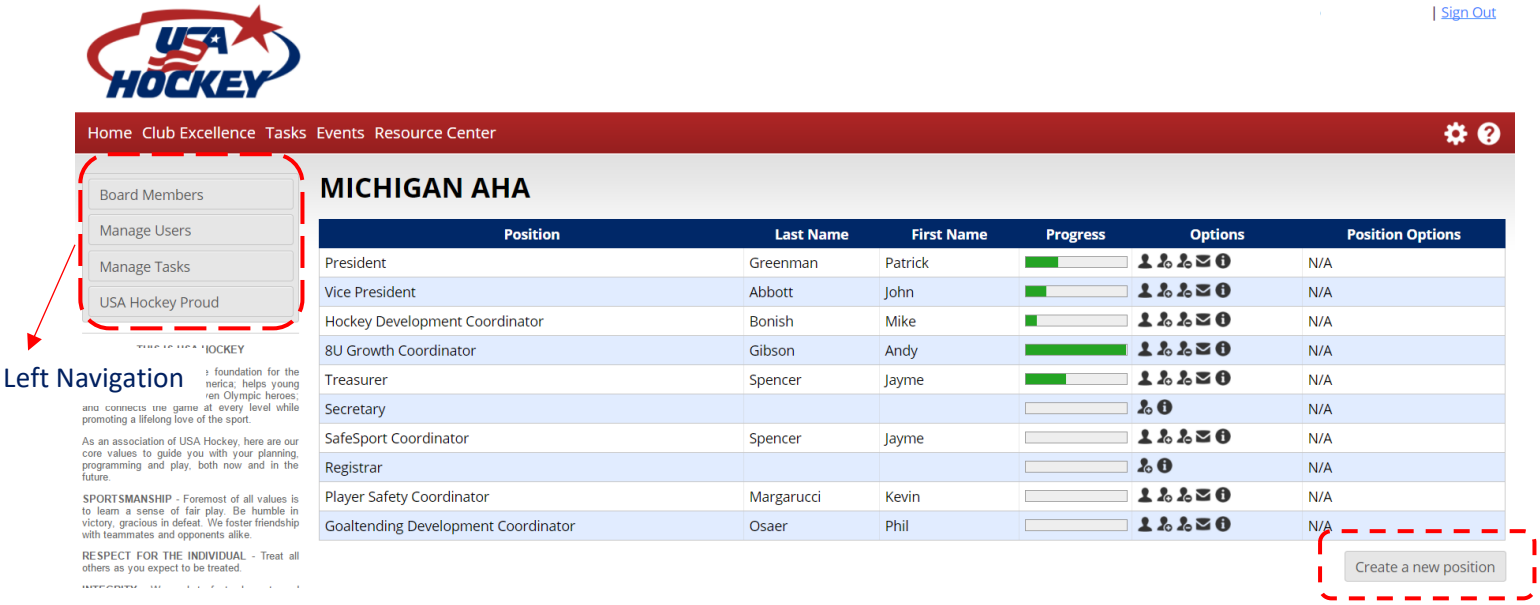
To remove a user, first clear them from the seat(s) they hold on the board. Then click the "-" icon located on the Board Members page.

Navigation

HOME Page

CLUB EXCELLENCE Page

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



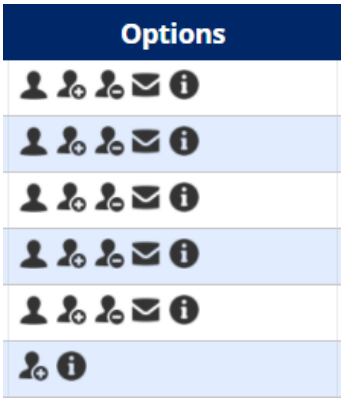
'Create a new position' button- this allows the administrator to create a custom position for their board.

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:

i. Board Members

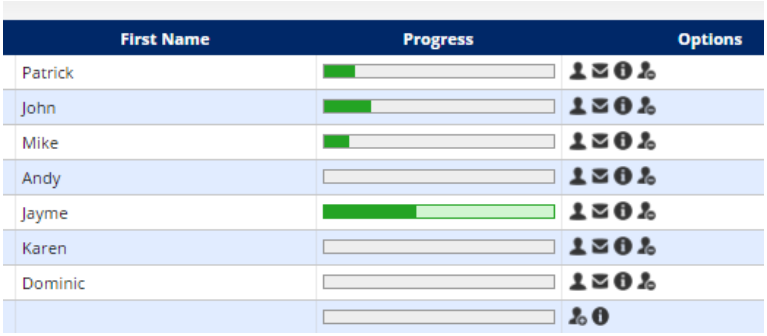
Options:



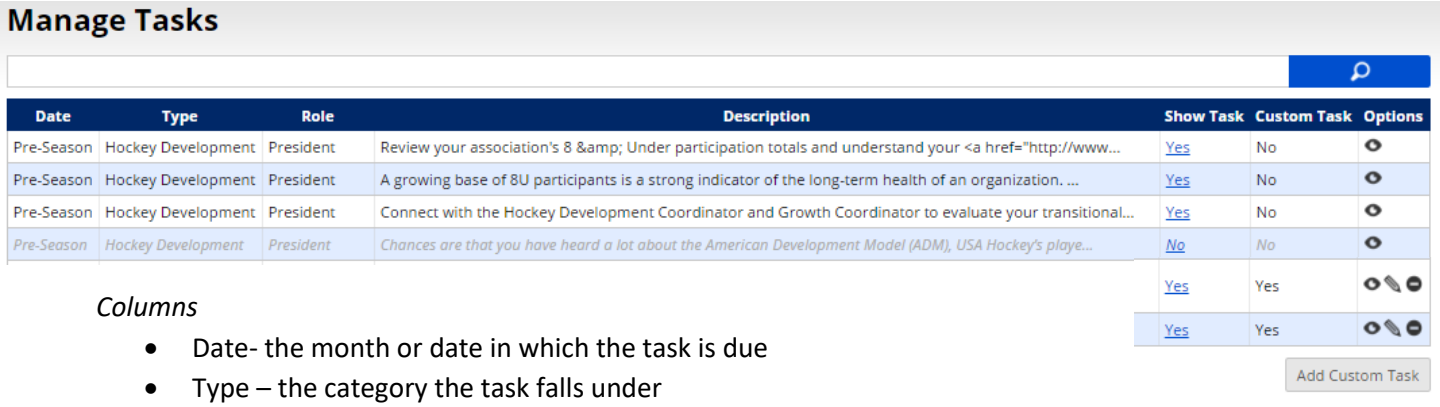
- Person icon – contact information
- Person icon with a "+" – assign member to a position
    i. Multiple people may be assigned to a position. People sharing a role will also share a single set of tasks; tasks cannot be assigned to an individual.
- Person icon with "-" – remove member from position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

Progress:

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.

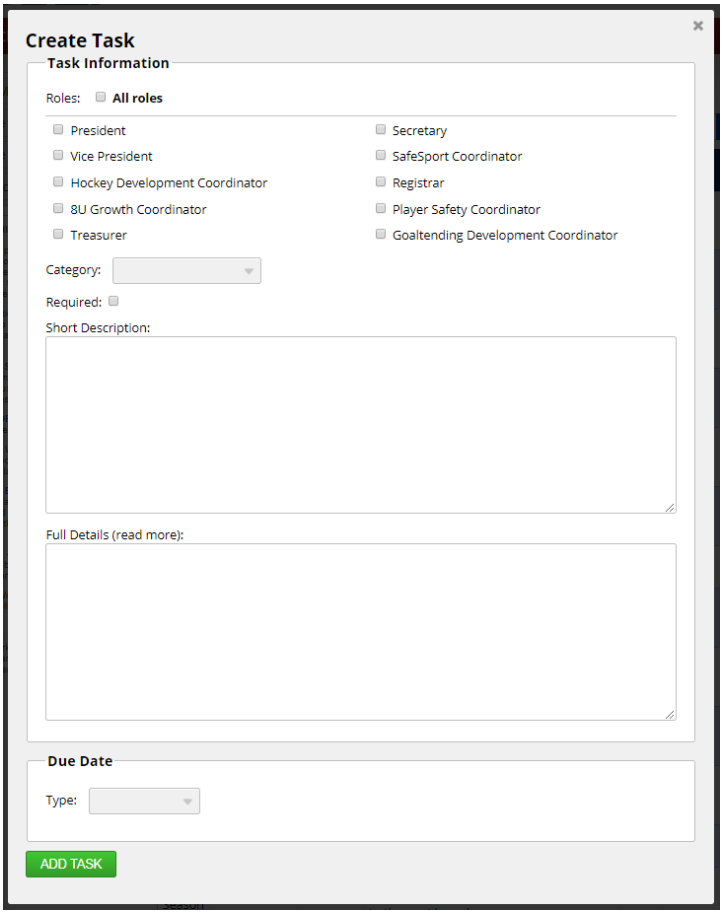


ii. Manage Tasks



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 is not custom (no)
- Options
    - Eye icon – view task
    - Pencil icon – edit task
    - "-" icon – remove task

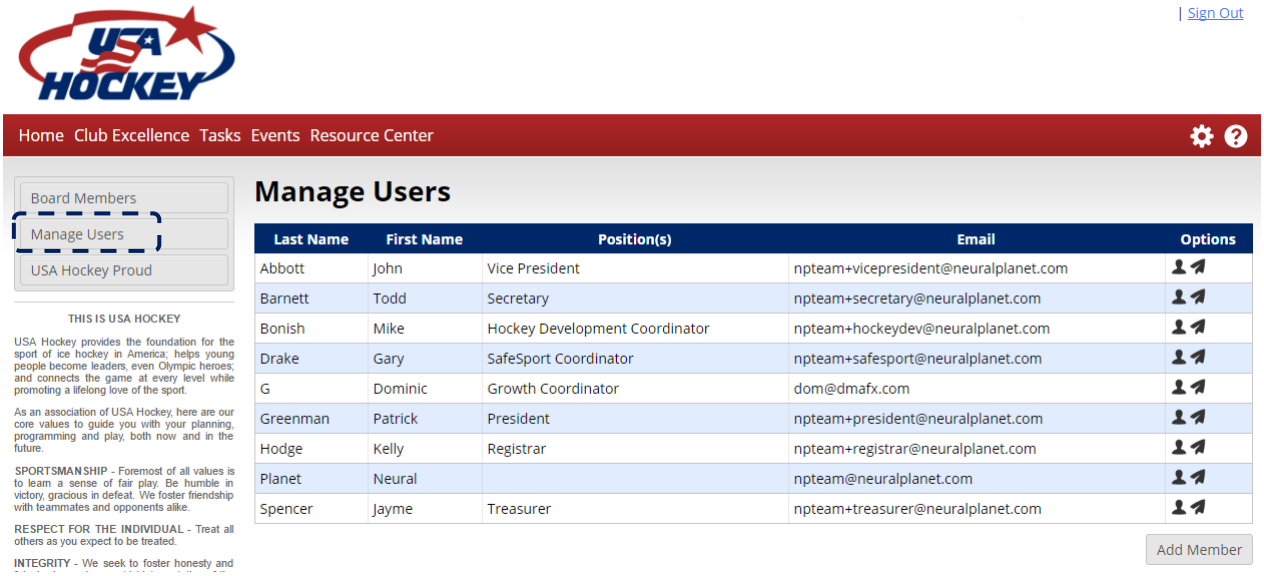


Add Custom Task – create a custom task

- Roles – a task may be added to one role, select roles, or 'All roles'. If more than one role is selected, a task will be created for each role. As a result, users are unable to edit a group of tasks.
- Required – the required checkbox indicates if a user may hide a task from view
- Due date – there are four Due Date Types available:
    - Pre-season

- Season-based
  - Months are generated based on the season-start date entered in the association's registration or renewal. If the season-start date needs to be updated, please contact ClubExcellence@USAHockey.com.
  - If the All months option is selected, an individual task will be created for each month. As a result, users are unable to edit a group of tasks.
- Post-season
- Exact date

iii. **Manage Users**

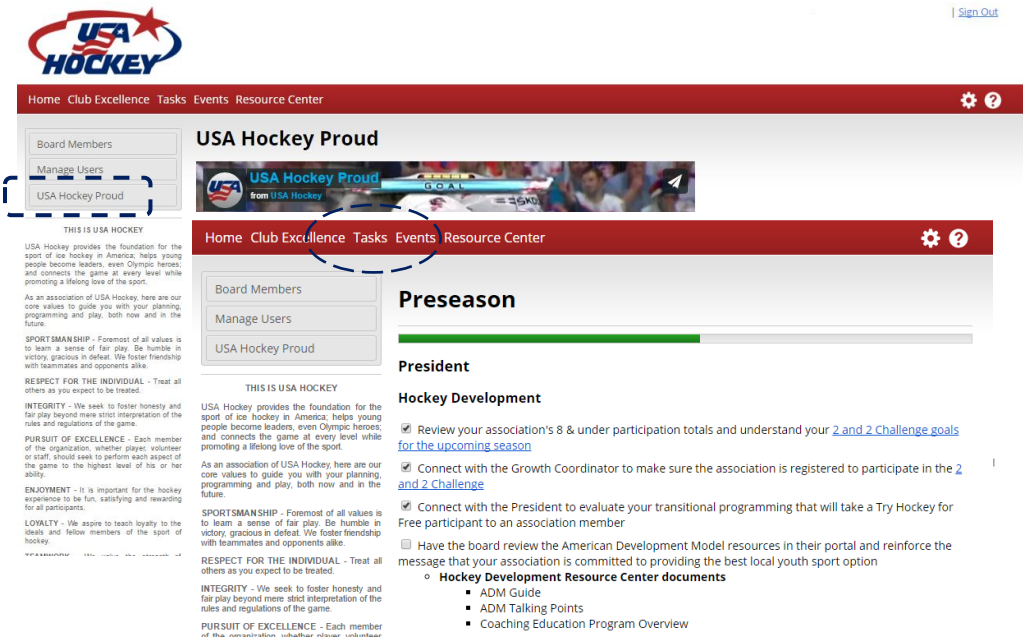


Last Name	First Name	Position(s)	Email	Options
Abbott	John	Vice President	npteam+vicepresident@neuralplanet.com	
Barnett	Todd	Secretary	npteam+secretary@neuralplanet.com	
Bonish	Mike	Hockey Development Coordinator	npteam+hockeydev@neuralplanet.com	
Drake	Gary	SafeSport Coordinator	npteam+safesport@neuralplanet.com	
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	Jayme	Treasurer	npteam+treasurer@neuralplanet.com	

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

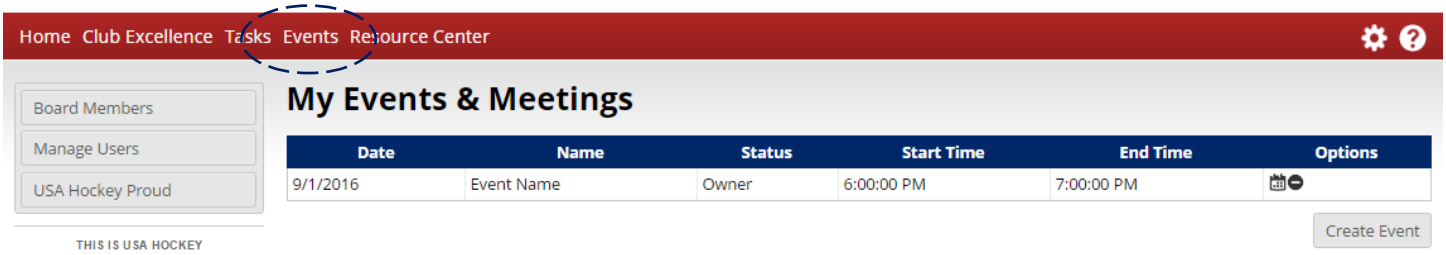


TASKS Page

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.

EVENTS Page

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



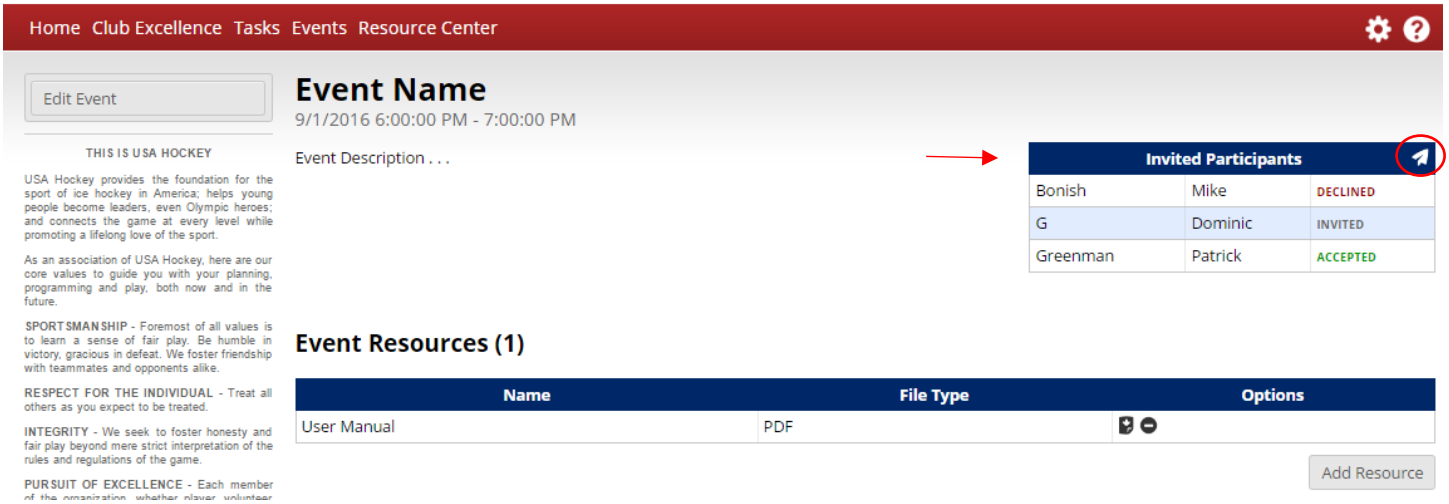
Create an event:

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:

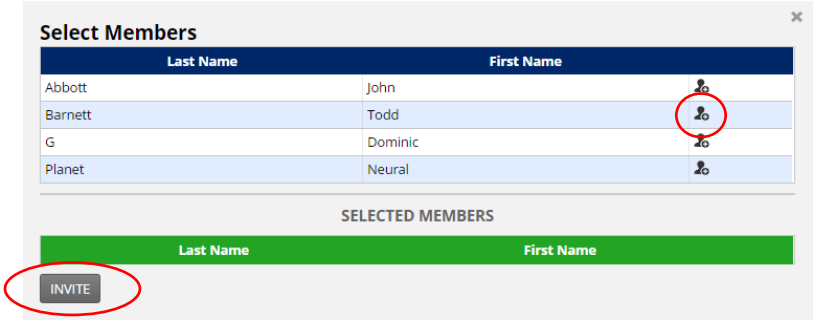
1. Only the event owner may delete the event.
2. From the Events page, click the "-" icon
3. Click OK to confirm the deletion

Calendar Icon – event details page



Invite Participants to an event

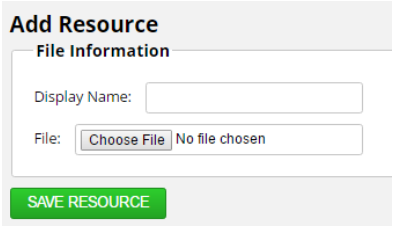
1. On the event details page, click the paper airplane icon in the top right corner of the Invited Participants box (see above image)
2. Select members by clicking the person icon. Selected participants will be added below the green Selected Members section
3. Click Invite



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

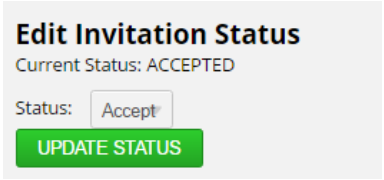
Add a Resource for the event

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



Update Invitation Status

1. On the event details page, click the pencil icon
2. Select a status (Accept/Decline) from the Drop-down 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

Brittany Bobak
(719) 576-8724 ext. 102
Brittany.Bobak@USAHockey.org

Kevin Erlenbach
(719) 576-8724 ext. 119
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.