# Update information online and pay with a credit card (NO FEES) or mailed paper check

Visit StrathmoreBelPre.org/annual-assessment for links. As you navigate the site, make sure to click "Update," "Continue," "Add Family Member," or "Finished" at the bottom of each page to save changes.

eSoft Menu Choices you will use to complete steps below:



- Steps 2, 3, 6 and 7: Hover over My Account for the drop down menu to update My Profile, review My • Memberships, update My Interests or Add Family Member.
- Steps 4 and 5: <u>Click</u> Memberships on the top menu for the Swim Membership list.
- 1. Log in to your account.
  - a. Click here for the BPRA Community Portal Login Screen (right click to open in a new tab)
  - b. Your user name is probably NOT your email address. Use the link on the login page to retrieve your login or reset your password as necessary. If you cannot retrieve your information with those links, please visit StrathmoreBelPre.org/pool-access-esoft and fill out the eSoft Planner help form.
- 2. Review your PROFILE, ensure that your name, street address, and email are correct, and make any necessary updates. Make sure all necessary household members are listed in My Profile. You can add additional members in step 3. Note: Please do **not** add the primary account holder as a Family Member.
- 1 My Account My Profile My Memberships My Interests Add Family Member ce

Change Password

a. Hover over My Account, click on My Profile.

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- b. Review/Update Profile Information: (Click "Continue" at the bottom when you are done.)
  - i. First Name, Last Name: This is the household member who will manage the account. On another page, you may add other homeowners and household members (Family Members).
  - ii. Organization/Team: This is your BPRA Property Address, but with this specific format: Street Name Street Number (example: Bustleton LN 9999). Important: Please do not delete any portion of this pre-populated field.
  - iii. Address: Please enter your mailing address, which may be different from your BPRA property address. Please complete all required fields, including ZIP + 4 if available.
  - Birthdate: Please enter your birthdate. iv.
  - V. Family Members: These are your Household Members as defined by the BPRA Recreational Facilities Policy. Please note: just because a family member is listed in My Profile does not mean they are set up for check-in at the pool. The family member must be enrolled in the 2024 BPRA Annual Assessment - due March 1, 2024 Swim Membership (Step 4 below) to be available for pool check in. If a family member is not listed already from a previous year, you can add them in Step 3 below. If you rent out your BPRA home, do not list family members. Fill out this help form to get your renters set up for pool check in.

### c. Custom Information:

- i. Please answer all questions in this section.
- ii. Please indicate if your property is a rental property; and if so, who will use the pool (Owner or Renter). This information assists the BPRA with mandatory Montgomery County rental home reporting, and helps us set up pool access for the correct users. If your property is a rental, don't add family members to your account; your renters will be set up with a separate account. Do fill out this <u>help form</u> so we can verify renter identity for pool use and check-in.
- iii. The SBP Civic Association (SPBCA) publishes a community directory for purchase by community members every few years. Please opt out if you do not want your information in the directory.

### 3. ADD HOUSEHOLD/FAMILY MEMBERS, and upload photos as necessary.

- a. These are your Household Members as defined by the BPRA Recreational Facilities Policy. Please note: just because a family member is listed in My Profile does not mean they are set up for check-in at the pool. The family member must be enrolled in the <u>2024 BPRA Annual Assessment due March 1, 2024</u> Swim Membership (Step 4) to be available for pool check in.
- b. **To add a family member:** Hover over My Account, click Add Family Members. Fill in required information. Click "Add Family Member" at the bottom of the page. Repeat as necessary.

Here are more detailed instructions. If you don't need them, skip down to Page 4.

Add family member: Add everyone besides the primary account holder (in the screenshots below, that's Jenny Dolphin). Hover over My Account, then click Add Family Member.



The below screen will appear. Scroll way down to "Add Family Member."

Primary Account Holder					
The Primary Account Holder is already set up and should not be added as a family member. First Name: Jenny Last Name: Dolphin					
Family Picture					
No Image	Upload New Pictur Choose File N *(must be jpg, gif Upload Picture	re: o file chosen , or png)			
Add Family Member					
*First Name: Dolphin					
*Birthdate: V *Gender Not Sel	<ul> <li>✓</li> <li>✓</li> <li>✓</li> </ul>				
o b B Z E *(must b	ew Picture: Choose File e jpg, gif, or png)	] No file chosen			
Family Members Already Added					
Name	Birthdate	Picture			

- Add your family member's first and last name.
- Add their date of birth.
- Add their gender.
- You may add a photo of the person now or later, but it must be done before visiting the pool.
- Scroll to the bottom and click "Add Family Member" to save changes.
- Repeat these steps for other family members.
- When done, choose My Account, then My Profile to confirm everyone is added who should be.
- c. **If you need to delete a family member:** visit StrathmoreBelPre.org/pool-access-esoft and fill out the eSoft Planner <u>help form</u>.

- 4. ENROLL in the 2024 BPRA Annual Assessment due March 1, 2024 membership to pay your assessment and get set up for pool check in (you may pay online or by check.)
  - a. Pay your BPRA Annual Assessment:
    - i. <u>**Click**</u> "Memberships." (Ignore the dropdown menu that appears if you just hover.)
    - ii. Click "Sign Up" next to 2024 BPRA Annual Assessment due March 1, 2024.
    - iii. Complete the steps for enrollment. Select pay by credit card or pay by check.

Here are detailed instructions. If you don't need them, skip down to Page 9.

Click directly on **Memberships** at the top of the screen. (if you hover over Memberships instead, you'll get a dropdown menu that doesn't apply yet)



To pay your 2024 BPRA Assessment click "Sign Up" at the top right of the screen, next to <u>2024 BPRA Annual</u> <u>Assessment - due March 1, 2024.</u>

Membership Manager
In the membership manager, you can enroll yourself into the membership programs. Click the details button to view more information and purchase the membership.
Swim Memberships Available for Enrollment
BPRA Annual Assessment (Required)

	Membership Name	Annual Price	Late Fee				
-	2024 BPRA Annual Assessment - due March 1, 2024 Jan 1, 2024 - Dec 31, 2024	Full: \$400.00	After Mar 31, 2024 \$42.00 late fee	Details	Sign Up		

After you click on "Sign Up," you will see the following screen. For the sections labeled A, B and C, look below the screenshot for detailed instructions.



Choose the specifics of the membership you are creating for the client. \* indicates a required field.

Important - One time fees will be charged immediately.

Membership Information - Step 1						
Membership Name:	2024 BPRA Annual Assessment - due March 1, 2024					
	FOR POOL CHECK IN SET UP: PLEASE ADD FAMILY MEMBERS* TO YOUR ACCOUNT UNDER "MY PROFILE" BEFORE COMPLETING THIS STEP.					
	*Admission for all family members/individuals residing in your home.					
Details:	Names and photos of each household member must be on file.					
	See BPRA Recreational Facilities Policy (adopted 11/10/2020).					
	The Recreational Facilities Policy can be found at StrathmoreBelPre.org/government- documents.					
Membership Dates: Membership For: Max 10 people	Jan 1, 2024 - Dec 31, 2024 Unselect any family members to not be included. Jenny Dolphin George Dolphin Jack Dolphin Jan Dolphin Joe Dolphin V					
Select Payment Options						
Annual Dues:	Full Payment - \$400.00 V					
Additional Options						
Child Care Pass:						
Totals						
	One Time Charge: \$400.00					
	Monthly Charge: \$ 0.00					
	Continue to Payment C					

- A. Make sure the correct family members are listed. These are the people who will be able to check in at the pool front desk. Unselect anyone that should not be there. If someone is missing, cancel your enrollment and return to Step 4 above to add a family member.
- B. You can add up to two child care providers under Additional Options at no cost. Click Yes, then how many you want to "purchase" (but it's free). Then add their name. (You may also add someone later in the year.)
- C. Click Continue to Payment.
- On the next screen, verify that your address and such are correct.
- Scroll down and either
  - Fill in credit card information, or
  - Check "I would like to send in a check for my payment."
- Check the box to agree to the membership agreement, then click Purchase Now.



On the payment screen, enter your credit card or banking information to process the payment. \*All fields are required.

Important - You will immediately receive a receipt for the one-time payments. You will receive receipts each month for your monthly payments.

# If you need to go back to the previous page to review your membership purchase, DO NOT HIT THE BACK BUTTON ON THE WEB BROWSER, use the button below.

	Go back to previous page
Payment Information -	Step 2
First Name on Card:	Jenny
Last Name on Card:	Dolphin
Billing Address:	the pool
Billing City:	Silver Spring
Billing State:	MD
Billing Zip Code:	20906
Email Address:	BPRAPool02@gmail.com
One Time Charge:	\$400.00
• Pay using Credit or Deb	it Card
Credit Card Type:	- Select a CC Type - 🗸
Credit Card Number:	
Credit Card CVV2:	(security code on back of credit card)
Expiration Date	01 🗸 2024 🗸
Send in Check	

Send in Check

Send in Check
If paying by check: After completing all membership enrollment selections, please write a <b>single</b> <b>check</b> to cover all enrollments. Make checks payable to BPRA, and note your property address on the check or on a separate piece of paper.
Please mail your check to: BPRA P.O. Box 6370 Silver Spring, MD 20916
Due date: March 1, 2024
Late fee and interest applies to all payments postmarked after March 31, 2024.
If you have questions about your assessment, please email treasurer4BPRA@gmail.com.
Please note: If you are paying by check, you will see a message that reads "membership suspended pending payment." This is a system-generated message. After your payment is processed, the message will no longer appear, and your membership status will appear as "Active."
I would like to send in a check for my payment.
Check must be postmarked by: March 31
View Membership Agreement  I agree to the Membership Agreement
Go back to previous page Purchase Now

- When you get to the next page, you may see a "Suspended pending payment" message. This message will be cleared after BPRA volunteers note your check payment in the eSoft Planner system.
- Make sure the appropriate family members (those that may show up for pool check in) are listed under Family Member. If anyone is missing, fill out this <u>help form</u>.
- Ignore any previous year memberships (Mar 1, 2021 Feb 28, 2022, Jan 1, 2022 Dec 31, 2022, Jan 1, 2023 Dec 31, 2023) that are listed.



In the membership manager, you can enroll clients into the membership program of their choice. All you have to do is hit the enroll button.

#### Membership purchased successfully

Show Deleted Memberships

Swim Memberships Purchased/Enrolled								
Title	Member #		Family Member		Membership Start Date	Membership End Date	Account	Attendance
2024 BPRA Annual Assessment - due March 1, 2024*			Jenny Dolphin George Dolphin Jack Dolphin Jan Dolphin Joe Dolphin		Jan 1, 2024	Dec 31, 2024	Details	History
2 Passes - Season Pass Membership - Must Show Pass for Entry	Ignore	pre	evious year men	nt	erships.	Feb 28, 2022	Details	History
Household Membership - Upload names/photos	10649902		Jenny Dolphin George Dolphin Jack Dolphin Jan Dolphin Joe Dolphin		Mar 1, 2021	Feb 28, 2022	Details	History
CHECK IN for Season Pass - MUST SHOW PASS	10627663		SeasonPass1 Dolphin SeasonPass2 Dolphin		Mar 1, 2021	Feb 28, 2022	Details	History

Be sure to add family member photos before you go to the pool for the first time. Instructions for uploading photos can be found at the end of these instructions.

- 5. ENROLL in any desired SBPCA membership, or make a Pet Waste Station, SBP Dolphins donation or Summer Entertainment & Street Festival Donation.
  - a. Click "Memberships."
  - b. Scroll down on the "Swim Memberships Available for Enrollment" page.
  - c. Click "Sign Up" next to your selections.
  - d. Complete the steps for selection. The steps are similar to those in Step 4 above.
  - e. Select pay by credit card or pay by check.
  - f. Repeat for each selection. There will be a separate credit card transaction for each.

# Membership Manager

In the membership manager, you can enroll yourself into the membership programs. Click the details button to view more information and purchase the membership.

Swim Memberships Available for Enrollment							
BPRA Annual Assessment (Required)							
Membership Name	Annual Price	Late Fee					
2024 BPRA Annual Assessment - due March 1, 2024 Jan 1, 2024 - Dec 31, 2024	Full: \$400.00	After Mar 31, 2024 \$42.00 late fee	Details	Sign Up			
Strathmore Bel Pre Civic Association (Optional)							
Membership Name	Annual Price	Late Fee					
SBPCA Membership Jan 1, 2024 - Dec 31, 2024	Full: \$25.00	No Late Fee	Details	Sign Up			
SBP Summer Entertainment & Street Festival Donation \$500 - SBP Superstar Jan 1, 2024 - Dec 31, 2024	Full: \$500.00	No Late Fee	Details	Sign Up			
SBP Summer Entertainment & Street Festival Donation \$250 - Community Champion Jan 1, 2024 - Dec 31, 2024	Full: \$250.00	No Late Fee	Details	Sign Up			
SBP Summer Entertainment & Street Festival Donation \$100 - Oscar Winner Jan 1, 2024 - Dec 31, 2024	Full: \$100.00	No Late Fee	Details	Sign Up			
SBP Summer Entertainment & Street Festival Donation \$50 - Band Leader Jan 1, 2024 - Dec 31, 2024	Full: \$50.00	No Late Fee	Details	Sign Up			
SBP Summer Entertainment & Street Festival Donation \$25 - Super Fan Jan 1, 2024 - Dec 31, 2024	Full: \$25.00	No Late Fee	Details	Sign Up			
SBP Summer Entertainment & Street Festival Donation \$200 Jan 1, 2024 - Dec 31, 2024	Full: \$200.00	No Late Fee	Details	Sign Up			
SBP Summer Entertainment & Street Festival Donation \$30 Jan 1, 2024 - Dec 31, 2024	Full: \$30.00	No Late Fee	Details	Sign Up			
SBP Summer Entertainment & Street Festival Donation \$20 Jan 1, 2024 - Dec 31, 2024	Full: \$20.00	No Late Fee	Details	Sign Up			
SBP Summer Entertainment & Street Festival Donation \$15 Jan 1, 2024 - Dec 31, 2024	Full: \$15.00	No Late Fee	Details	Sign Up			
SBP Summer Entertainment & Street Festival Donation \$10 Jan 1, 2024 - Dec 31, 2024	Full: \$10.00	No Late Fee	Details	Sign Up			
SBP Summer Entertainment & Street Festival Donation \$5 Jan 1, 2024 - Dec 31, 2024	Full: \$5.00	No Late Fee	Details	Sign Up			
Pet Waste Station Donations (Optional)							
Membership Name	Annual Price	Late Fee					
Pet Waste Station Donation \$5 Jan 1, 2024 - Dec 31, 2024	Full: \$5.00	No Late Fee	Details	Sign Up			
Pet Waste Station Donation \$10			Detelle				

6. Click on MY MEMBERSHIPS, and VERIFY that your membership is set up correctly. Family members must be listed in your <u>2024 BPRA Annual Assessment - due March 1, 2024</u> membership to show up for pool check in.

### 2024

a. Hover over My Account, then choose My Memberships.



# My Memberships

This is a listing of your membership(s). You can view the payment details of the membership by clicking on the Details button.

Swim Memberships Purchased/Enrolled							
Title	Member #		Family Member	Membership Start Date	Membership End Date	Account	Attendance
2024 BPRA Annual Assessment - due March 1, 2024*	10007000		Jenny Dolphin George Dolphin Jack Dolphin Jan Dolphin Joe Dolphin	Jan 1, 2024	Dec 31, 2024	Details	History
2 Passes - Season Pass Membership - Must Show Pass for Entry	Previous	ye	ar memberships	s can be ign	ored , 2022	Details	History
Household Membership - Upload names/photos	10649902		Jenny Dolphin George Dolphin Jack Dolphin Jan Dolphin Joe Dolphin	Mar 1, 2021	Feb 28, 2022	Details	History
CHECK IN for Season Pass - MUST SHOW PASS	10627663		SeasonPass1 Dolphin SeasonPass2 Dolphin	Mar 1, 2021	Feb 28, 2022	Details	History

Ignore previous year (Mar 1, 2021 - Feb 28, 2022, Jan 1, 2022 - Dec 31, 2022, Jan 1, 2023 - Dec 1, 2023) memberships. Valid memberships for 2024 are dated Jan 1, 2024 - Dec 31, 2024.

Please note: If you are paying by check, you will see a message that reads "Suspended pending payment." This is a system-generated message. After your payment is processed, the message will no longer appear, and your membership status will appear as "Active." Please allow 2-3 weeks for your payment to be processed and the system to be updated.

- 7. Complete MY INTERESTS to express interest in volunteering for the community.
  - a. Hover over My Account, Click My Interests.

### 2024

- b. Indicate your BPRA and/or SBPCA Volunteer interests by checking all that apply. Check at least one box ("None" is an option)
- c. Click "Continue"
- 8. If you opted for check payment: After completing all membership enrollment selections, please write a single check to cover all enrollments. Make check payable to BPRA, and note your property address on the check or on a separate piece of paper. Please mail your check to BPRA P.O. Box 6370, Silver Spring, MD 20916. Payments must be received or postmarked by March 31, 2024 to be considered on-time.

Questions? Email <u>BPRAPool02@gmail.com</u>

# Instructions for uploading photos

To add a photo:

- Log into your account.
- Hover over My Account and select My Profile.
- Scroll down to the family member's name.
- Click Choose File (see red arrow in the screenshot below), and select the file you want to upload (jpg, gif, or png format only).
- Click Open (or Select, Choose, or whatever command option that appears) in the selection window. You should then see the file name next to "Choose File" in eSoft.
- Scroll all the way to the bottom of the screen and click "Update."
- The message "Profile updated successfully" should appear toward the top of the screen, and the photo should be visible in the square that says "No Image" in the screenshot below.

Family Member 1 Information	
	*First Name Jack
	*Last Name Dolphin
No	*Birthdate Jan 🗸 01 🗸 2000 🗸
<u> </u>	Gender Male 🗸
	Barcode ID
Upload New Picture: Choose File No file	chosen
*(must be jpg, gif, or pro	1)
Family Member 2 Information	

Add photo for primary account holder:

SBPCA Directory? C 103 C 110					
Profile Picture					
	No Image	Upload New Picture: Choose File No file chosen *(must be jpg, gif, or png)			
<b>Family Picture</b>					

Questions? Email BPRAPool02@gmail.com