



The CareSource Foundation utilizes an online application and grant reporting system. Please use this guide to help you navigate, and to answer questions.

We hope you find it helpful!

Getting Started:



All grant requests must begin with an email to Cathy Ponitz, VP CareSource Foundation, at cathy.ponitz@caresource.com. Your request must include information about your organization, how you will use the funding provided and how it aligns with the CareSource Foundation focus areas.

If it is determined that your request is a good fit to receive funding, you will be invited to apply via email. The email will include a link to log into our online grant portal.

First time users/grantees: After you have received your invitation to apply email from Cathy Ponitz, follow the link in the email, then click “New Applicant” and fill out all fields to create an account.

Returning Users: If you have received a grant from the CareSource Foundation in the past, please enter the email and password used to create your account.

Helpful Tip: We know organizations experience staffing changes.

If your organization received funding in the past, it is likely that you have an existing account with us. If you are unsure, feel free to contact us prior to submitting an application to avoid creating duplicate accounts. We can transfer accounts to any new staff member handling the grants for your organization.

FOR QUESTIONS: Call Amy Lowry at (937) 531-3888 or email caresourcefoundation@caresource.com

Please Sign In

Welcome to The CareSource Foundation!

RETURNING USER?

- If you have used our system in the past, enter the email and password used to create your account

FIRST TIME USER?

- Click "New Applicant"

Helpful Tips:

- If you are having trouble logging in, please click "Forgot Password" and a temporary password will be sent
- If a password auto-populates, clear it and enter manually
- Do not copy and paste temporary password. Enter manually

Thank You!

E-mail	Password
<input type="text"/>	<input type="password"/>
<input data-bbox="1908 1268 2023 1290" type="button" value="New Applicant?"/>	<input data-bbox="2265 1268 2379 1290" type="button" value="Forgot Password?"/>
<input data-bbox="2023 1340 2074 1363" type="button" value="Login"/>	

Forgot Password?



If you forget your password, please enter your login email address and click **FORGOT PASSWORD**.

Re-enter login email, click “Send Password”
Check email and follow instructions
Notice: The “Forgot Password” link can be used ONCE in 24-hours

Please Sign In

Welcome to The CareSource Foundation!

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FIRST TIME USER?

- Click "New Applicant"

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- Do not copy and paste temporary password. Enter manually

Thank You!

E-mail

Password

Forgot Password?

Please enter your e-mail address and click Send Password. We will e-mail you a temporary password.

E-mail

[Return to login](#)

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Applications and Requirements



Applications tab

- You will see all applications you are working on

Requirements tab

- Is visible **only** after a requirement is assigned by the CareSource Foundation staff

A screenshot of the CareSource Foundation web application. At the top, there are tabs for "Login", "Account", and "Form". Below these is the CareSource Foundation logo. A horizontal bar contains links for "Account:", "Change E-mail/Password", "Last Log in:", "Contact Us", and "Exit". On the right of this bar is a "Default" dropdown menu. Below the bar are two tabs: "Applications" (highlighted with a red circle) and "Requirements". The "Applications" tab is active, showing a heading "Applications" and a message: "To view your In Progress or Submitted applications, please select from the drop down box at the right side." To the right of this message is a "Show" dropdown menu currently set to "In Progress Applications". Below this is a table with the following columns: "Application Name", "Project Title", "Requested", "ID", "Last Updated", and "Action". The table contains one row with the following data: "Sample Application Name", "Sample Project Title", "1234.00", "1234", "11/3/2017", and a trash icon. A red arrow points from the text "Double click the Application or Requirement to open it." to the "Sample Application Name" in the table.

Double click the
Application or
Requirement to open it.

Applications and Requirements

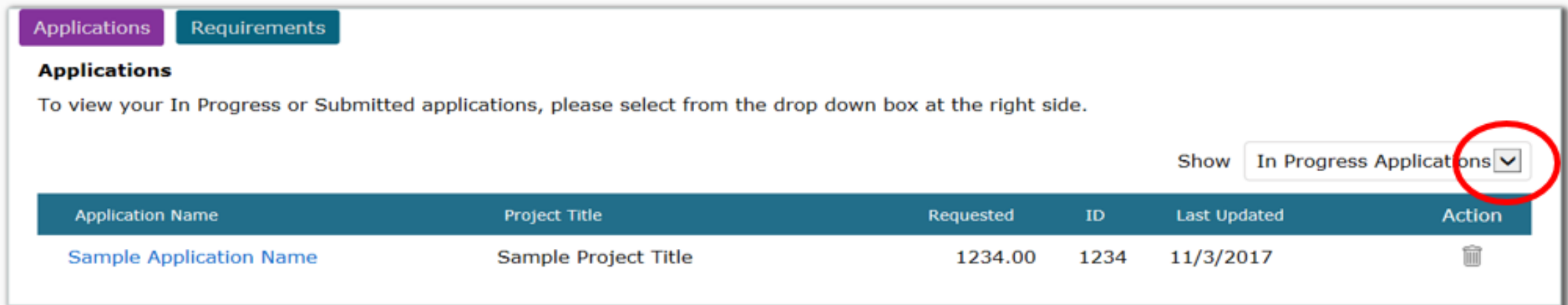
By clicking on the drop down box, you will have the following options available


If you click the “Applications tab”, you will see:

- In Progress Applications
- Submitted Applications

If you click the “Requirements tab”, you will see:

- New Requirements
- In Progress Requirements
- Submitted Requirements

A screenshot of a web application interface. At the top, there are two tabs: "Applications" (highlighted in purple) and "Requirements" (highlighted in teal). Below the tabs, the heading "Applications" is displayed. A text instruction reads: "To view your In Progress or Submitted applications, please select from the drop down box at the right side." To the right of this text is a "Show" button followed by a dropdown menu currently set to "In Progress Applications". The dropdown menu is circled in red. Below this is a table with the following columns: "Application Name", "Project Title", "Requested", "ID", "Last Updated", and "Action". The table contains one row of sample data: "Sample Application Name", "Sample Project Title", "1234.00", "1234", "11/3/2017", and a trash can icon in the "Action" column.

Application Name	Project Title	Requested	ID	Last Updated	Action
Sample Application Name	Sample Project Title	1234.00	1234	11/3/2017	

Why can't I see the report requirement I need?

1) Maybe you're not the primary owner of the grant record – this is typically the person who submitted the grant application. You must have ownership of the requirement before receiving access to the requirement.

- The primary owner must login and click the “**Transfer to new owner**” icon under the Action column
- If the primary owner is not available, please call us for help.

2) Your account was created by us, and you received an email stating that an account had been created for you, but when you logged in, you used a different email address than what we used to create your account. If you feel this is what has happened, you will need to go back and log in using the email your notification was sent to or contact us to have your account transferred. Once you've successfully logged in using the original email that the notification was sent to, you can change your email address if needed.

Account Options:

Grantees will have the ability to transfer applications or requirements

A) Transfer to new owner

Action



Transfer to new owner

*Your Name

Your E-mail a_luvmykids@hotmail.com

*E-mail

Check Email

*Subject CareSource Foundation Application Ownership Transfer

Memo to New Owner

This message is to notify you that ownership of Application 20168 has been transferred to you. You must accept transfer of ownership in order to complete this process.

Please login to complete the application.
You can login to your account, «Account_Login_URL», at any time.
NOTE: If you are a new user, a separate_email will be sent to you with the login web page and your initial password. For security reasons you will be asked to change the password when you first log in.

Maximum (5000) characters

* Required

Transfer

Cancel

Account Options:



Grantees will have the ability to manage viewers

B) Manage Viewers:

Action



IMPORTANT: Changes are not permanent until you click Update

Manage Viewers

*E-mail

Add Viewer(s)

There are no Viewers

E-mail to New Viewers

*Your Name

Your E-mail a_luvmykids@hotmail.com

*Subject

Application Viewer Access

Memo to New Viewers

This message is to notify you that you have been granted Viewer access for Application 20169.
Please login to view the Application.
You can login to your account, «Account_Login_URL» at any time.

Maximum (5000) characters

* Required

Update

Cancel

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Account Options:

Grantees will have the ability to delete and email copy of application or requirements

C) Delete Application and D) Email Copy

Action



Note: You will not be able to delete the application or requirement once it has been submitted.



Have more questions?

Please refer to the FAQ section on the CareSource Foundation website, found here:

Link to website:

[CareSource Foundation Grant Applications](#)