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!

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

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.

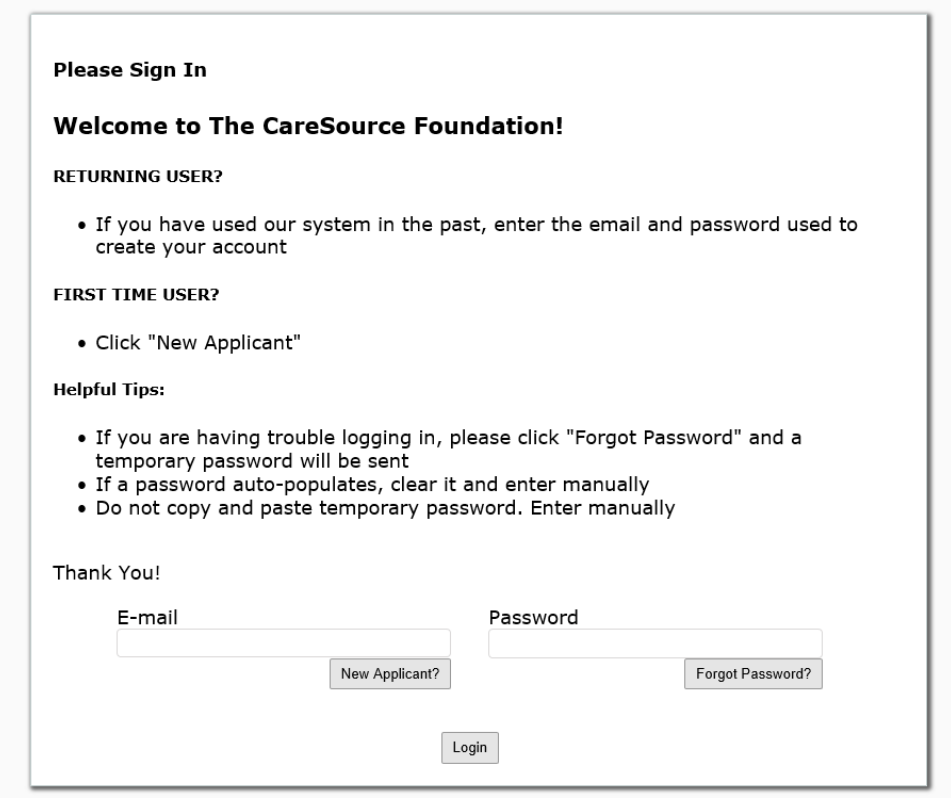
If it is determined that your request is a good fit to receive funding, you will be invited to apply via email. The email will include a link to log into our online grant portal.

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

New Applicant? Forgot Password?

Login

Forgot Password?

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

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

New Applicant?

Forgot Password?

Login

Re-enter login email, click "Send Password"

Check email and follow instructions

Notice: The "Forgot Password" link can be used ONCE in 24-hours

Forgot Password?

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

E-mail

Send Password

Return to login

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

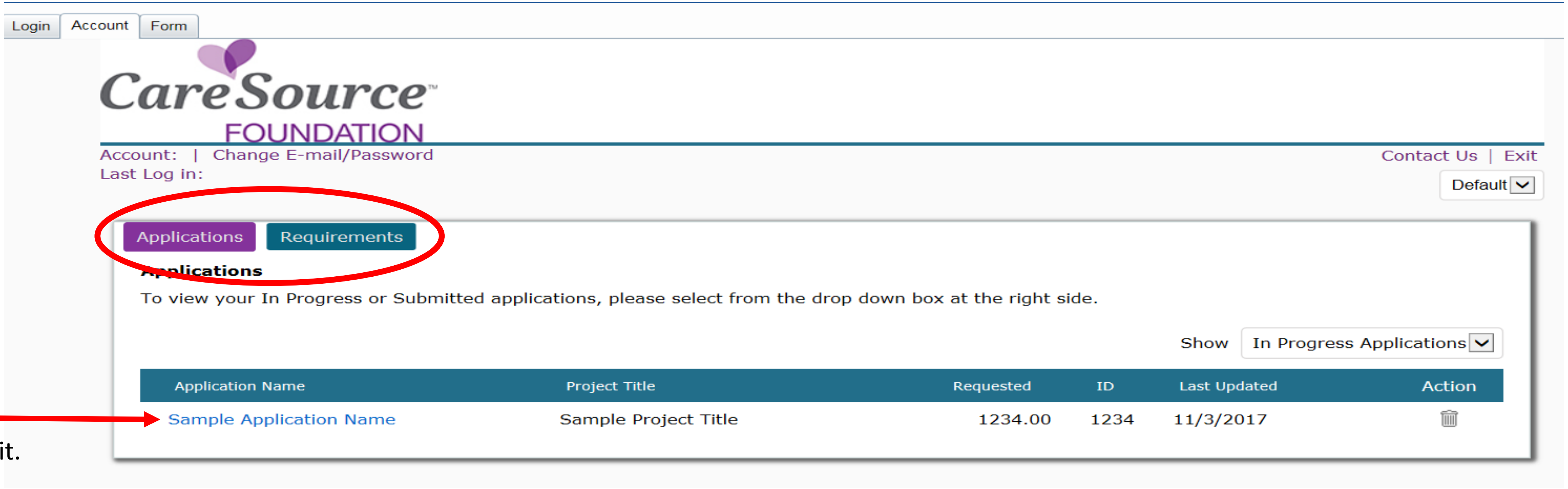
Applications and Requirements

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



Double click the Application or Requirement to open it.

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

Applications and Requirements

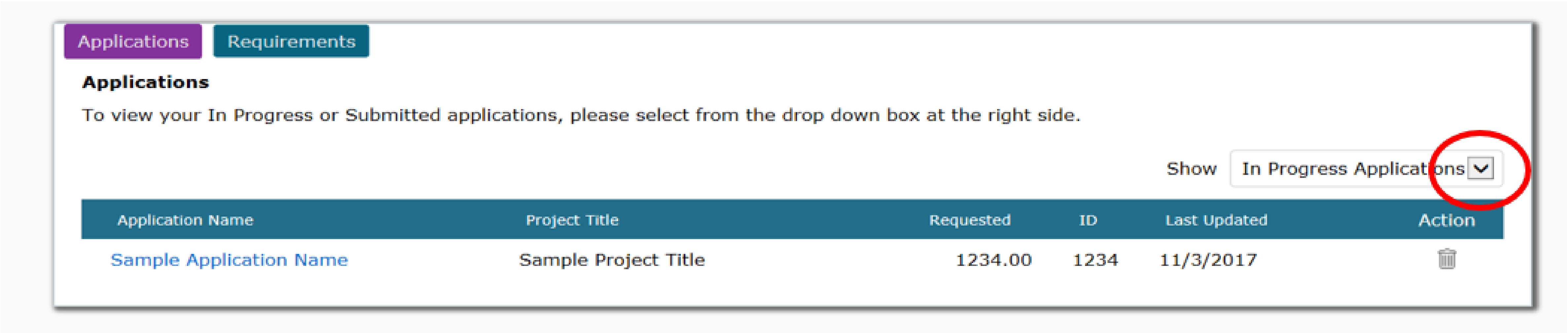
By clicking on the drop down box, you will have the following options available

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



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

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

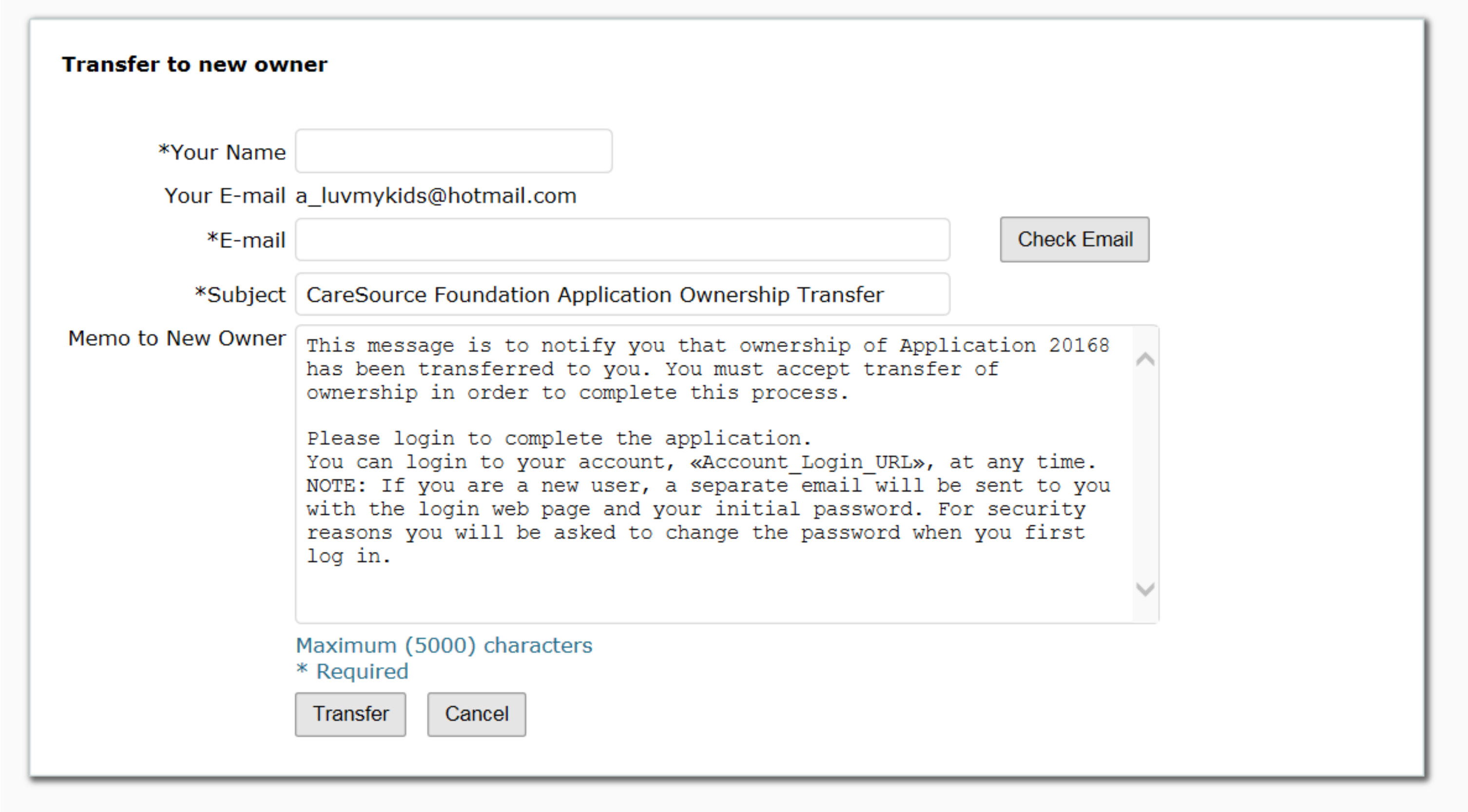
1) Maybe you’re not the primary owner of the grant record – this is typically the person who submitted the grant application. You must have ownership of the requirement before receiving access to the requirement.

- 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

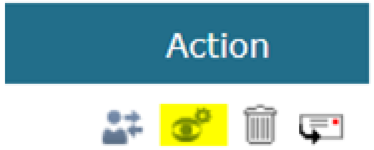


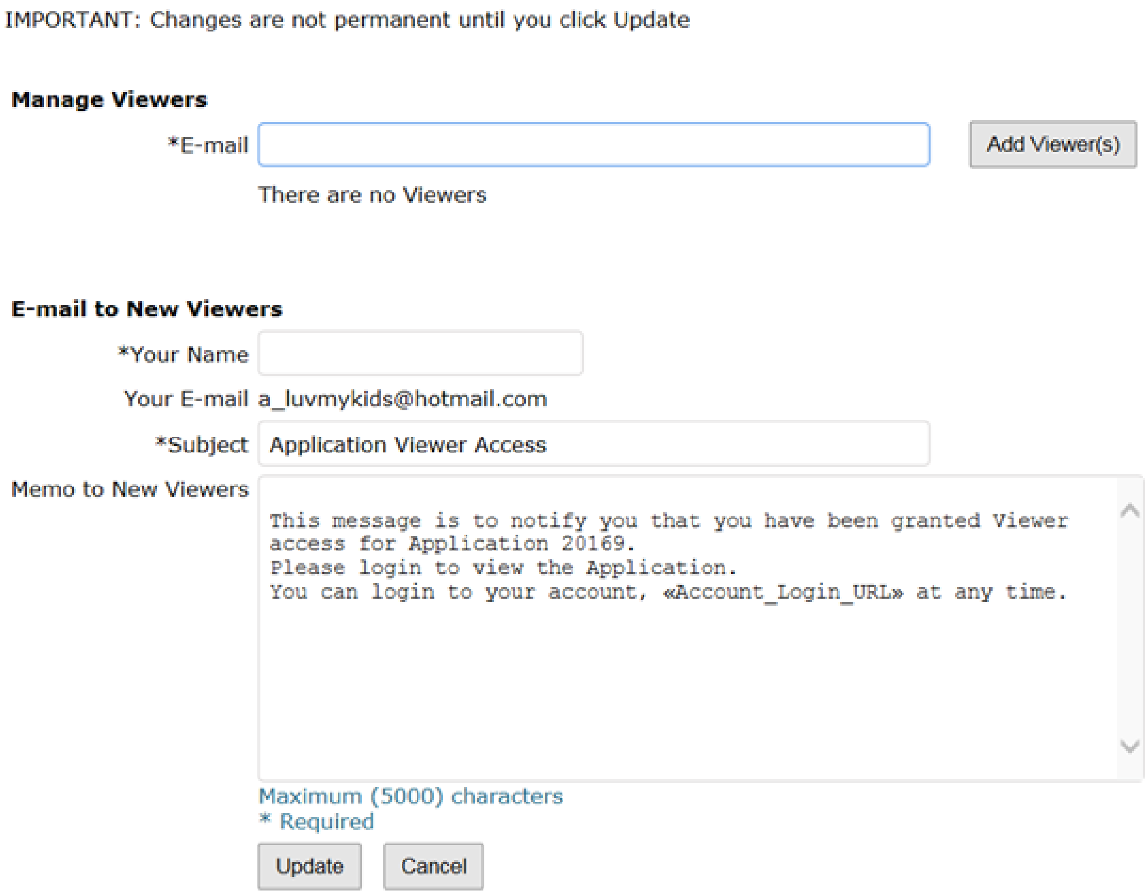
FOR QUESTIONS: Call Amy Lowry at (937) 531-3888 or email caresourcefoundation@caresource.com

Account Options:

Grantees will have the ability to manage viewers

B) Manage Viewers:





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

Account Options:

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

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

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

Have more questions?

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

Link to website:
[CareSource Foundation Grant Applications]

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