



The CareSource Foundation now 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 Logged In:



Do you need to submit a grant application using the online portal? If so, you are considered a new applicant.

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.

Did you submit a grant application using the online portal? If so, you are considered a returning applicant.

Enter the email and password you used to create your account and click LOGIN. Do not click “New Applicant”.

Did you email your grant application to caresourcefoundation@caresource.com, and are now being asked to complete grant requirements for a grant you already received?

You will receive an email indicating that an account was created for you, you *do not* click NEW APPLICANT because we created your account. ***Important:*** You will use the same email address the notification was sent to and the temporary password included then click LOGIN. If you need to change the email address, you may do so after you have successfully created an account.

A screenshot of the CareSource Foundation login page. The page has a white background with a thin grey border. At the top, it says "Please Sign In" in bold. Below that is "Welcome to The CareSource Foundation" in bold. There are three bullet points: "Please create an account by clicking the NEW APPLICANT button below.", "If you already have an account, please log in.", and "If you are having trouble logging in, please click the FORGOT PASSWORD button below." Below the text is "Thank you!". There are two input fields: "E-mail" and "Password". Below the E-mail field is a "New Applicant?" button. Below the Password field is a "Forgot Password?" button. At the bottom center is a "Login" button.

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

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

- Please create an account by clicking the NEW APPLICANT button below.
- If you already have an account, please log in.
- If you are having trouble logging in, please click the FORGOT PASSWORD button below.

Thank you!

E-mail 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

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](#)

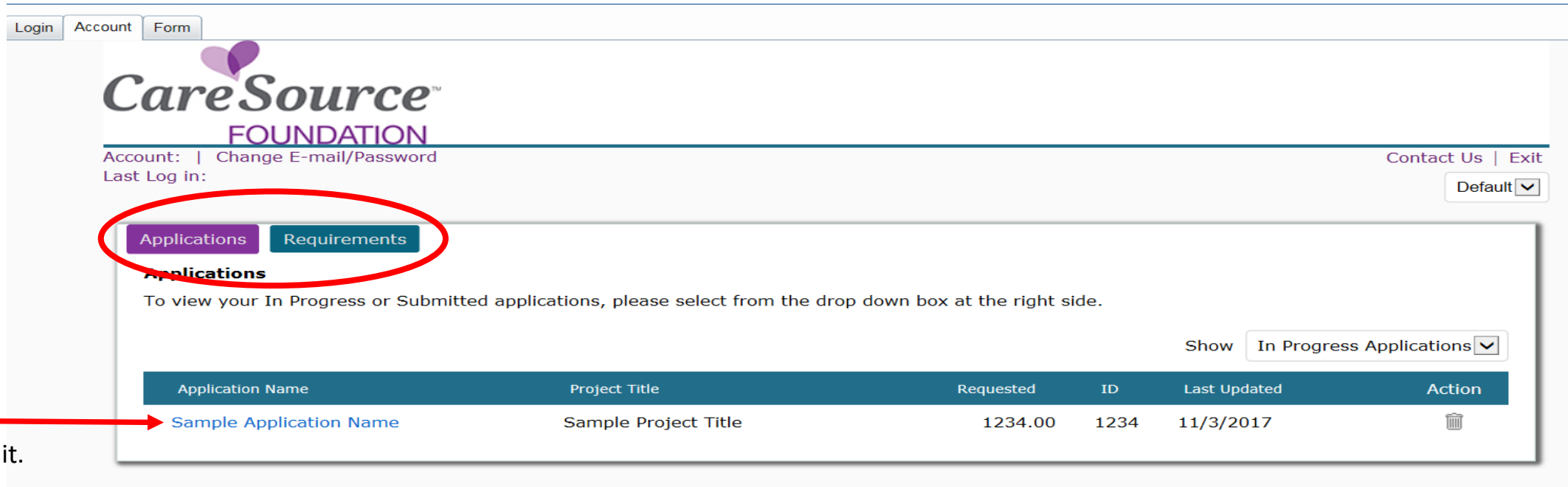
Applications and Requirements

Applications tab

- You will see all applications you are working on

Requirements tab

- Is visible **only** after a requirement is assigned. You will receive an email notification letting you know a requirement has been published to your account.



Account: | Change E-mail/Password
Last Log in: Contact Us | Exit


Default ▾

Applications **Requirements**

Applications

To view your In Progress or Submitted applications, please select from the drop down box at the right side.

Show

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

Double click the Application or Requirement to open it.

Applications and Requirements

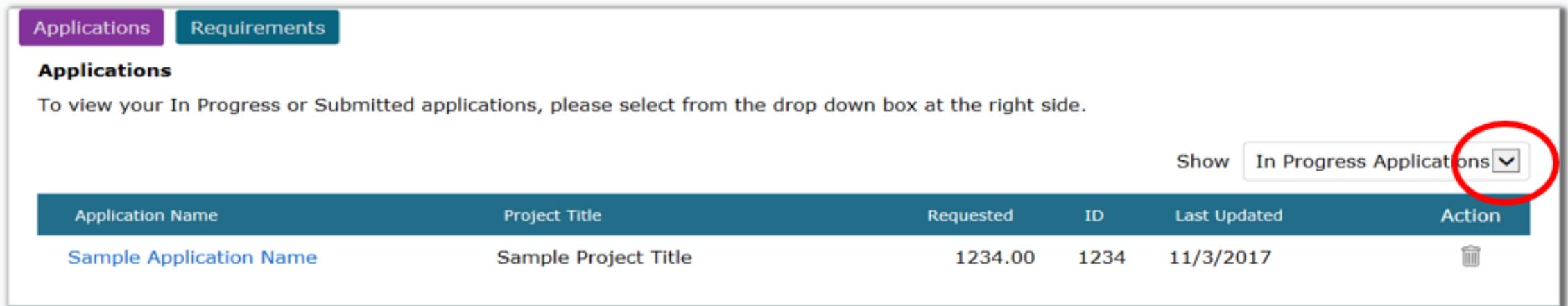
By clicking on the drop down box, you will have the following options available

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



The screenshot shows a web interface with two tabs: "Applications" (selected) and "Requirements". Below the tabs, there is a heading "Applications" and a note: "To view your In Progress or Submitted applications, please select from the drop down box at the right side." To the right of this note is a "Show" button with a dropdown menu currently set to "In Progress Applications". A red circle highlights this dropdown menu. Below the note 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.

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

*Subject

Memo to New Owner

Maximum (5000) characters
* Required

Account Options:



Grantees will have the ability to manage viewers

B) Manage Viewers:



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

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

Account Options:

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

C) Delete Application and D) Email Copy



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:

[CareSource.com/Foundation FAQs](https://www.caresource.com/FoundationFAQs)

Link to website: [CareSource.com](https://www.caresource.com)