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!

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

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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

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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. You will receive an email notification letting you know a requirement has been published to your account.

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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
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.

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Account Options:

Grantees will have the ability to transfer applications or requirements

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Account Options:

Grantees will have the ability to manage viewers

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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.

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Have more questions?

Please refer to the FAQ section on the CareSource Foundation website, found here: CareSource.com/Foundation FAQs

Link to website: CareSource.com