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## USING THE CHASE ONLINE APPLICATION PORTAL

### Register as an Applicant

An applicant can be an individual, an institution or an organization. If this is the first time applying online, then you are required to register the applicant. Otherwise you may proceed to “Login”.

The screenshot displays the CHASE online application portal. The header features the CHASE logo and the text "Culture, Health, Arts, Sports & Education Fund" and "Working for you". The main content area is divided into two sections. On the left, the "About Us" section provides information about the fund's incorporation and its focus areas: Sports Development, Early Childhood Education, Health, and Arts and Culture. Below this is the "GOVERNANCE" section, which lists the Board of Directors, Sub-sector Committees, and the Management Team. On the right, the "Login" section contains a "User Name" field (with a note "(Enter your TRN number)"), a "Password" field, and a "Login" button. Below the login fields are links for "Applicants" (To register as an Applicant click here) and "Suppliers" (To register as a Supplier click here). A red arrow labeled "For registration" points from the top left towards the "Applicants" link. A purple arrow labeled "For Login" points from the top right towards the "User Name" field.

All areas with a red asterisk (\*) MUST be completed.

First Name and Last Name: - For an Institution or Organization, First Name and Last Name may be given as the institution/organization name split, for example “Chase Fund Basic School” could be registered as First Name: Chase Fund, Last Name: Basic School.

Email Address: - applicants without an email address may still register but must contact the CHASE Fund for login information afterward.

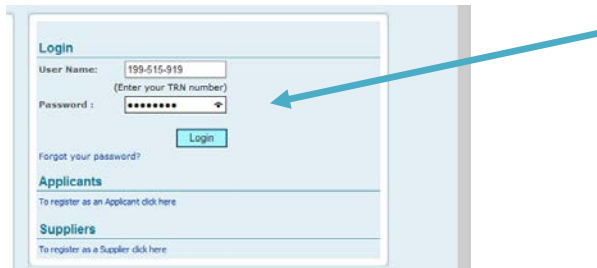
Contact Number, Mobile Number, and Fax Number: - the area code must be included e.g. type 8769015555. It will then automatically display as (876)901-5555.

City: - if your city/town/community is not listed, select the city/town/community nearest to you.

## Login

Login to the homepage using your TRN, and the password that was provided to you in email or verbally.

Clicking “Forgot your password” will send a recovery email to the email address you registered with. If no email address was used, then please call CHASE for password recovery.



The image shows a login form with the following elements:

- Login** (Section Header)
- User Name:** Input field containing "199-615-919" with a subtext "(Enter your TRN number)".
- Password:** Input field with masked characters "\*\*\*\*\*" and a dropdown arrow.
- Forgot your password?** Link.
- Login** (Submit Button)
- Applicants** (Section Header) with a link "To register as an Applicant click here".
- Suppliers** (Section Header) with a link "To register as a Supplier click here".

A blue arrow points from the right side of the page towards the password input field.

## Funding Application

If you wish to view an already application or project, you will see it listed and you may click on the “ID” for viewing.

The screenshot shows the CHASE website interface. The header includes the CHASE logo and the text "Culture, Health, Arts, Sports & Education Fund". A navigation menu on the left lists "Personal Data", "Change Password", "Funding Application", "My Projects", and "My Proposals". The main content area displays instructions for submitting applications and a table of "My Open Proposals". A red arrow points to the "ID" column header in the table.

ID	Title	Type	Category	Status	Created Date	Project Officer	Project Manager
APP-EDU-0202-15	Test Basic School	Early Childhood Education	Building of Basic Schools & Resource Centres	Level 1 Recommendation	11/11/2015 11:22:16 AM	Project Officer 3	Project Manager

## Start a New Application

Click on “Funding Application” on the left to start a new application.

The screenshot shows the CHASE website interface. The header includes the CHASE logo and the text "Culture, Health, Arts, Sports & Education Fund". A navigation menu on the left lists "Personal Data", "Change Password", "Funding Application", "My Projects", and "My Proposals". The main content area displays instructions for submitting applications. A red arrow points to the "Funding Application" link in the navigation menu.

All areas with a red asterisk (\*) MUST be completed.

Project Title: - The project title is open to discretion and as a guide is preferred as a short name for the project which includes the applicant’s name, examples are, “Yellow Rock Infant School – Fencing of Yard”, “Mary Brown Scholarship 2016”, “John Silver – Cancer Treatment”, “Green Park Community Art Festival 2016”, etc. etc. Please check the spelling of the project title.

Project Type: - It is very important to at first select the correct “Project Type” of either “Arts and Culture”, “Early Childhood Education” or “Health Sector” from the drop down list.

The screenshot shows a web application interface for a 'Funding Application'. The breadcrumb trail is 'Personal Site > Pages > FundingApplication.aspx'. The main heading is 'Funding Application'. Below this, there is a navigation menu with 'Change Password', 'Funding Application', 'My Projects', and 'My Proposals'. The 'Funding Application' section contains instructions: 'To complete an application form; first state the "project title", then choose a "project type" and "project category" relevant to your funding needs from the dropdown'. The 'General Information' section includes the following fields:

- Project Title \***: A text input field.
- Project Type \***: A dropdown menu with 'Select...' at the top and three options: 'Arts and Culture', 'Early Childhood Education', and 'Health Sector'.
- Project Category \***: A dropdown menu.
- Purpose of Funding \***: A text input field.
- Application Date**: A date input field.
- Specific Objectives \***: A text input field.

On the left side, there is a table with currency conversion rates:

Currency	Rate
CAD	88.00
Euro	95.00
Jamaican dollar	1.00

Project Category: - Scholarship applicants should select only the “Scholarship” project category in all cases.

Note that the “Training” category is NOT for scholarship recipients, but for participants in training programs funded by CHASE

This screenshot shows the 'Funding Application' form with the 'Project Type' dropdown set to 'Early Childhood Education'. The 'Project Category' dropdown is open, displaying a list of categories:

- Select...
- Health Screening of Basic School Children
- Building of Basic Schools & Resource Centres
- Child Care Centres
- Improvement of Nutritional Status
- Institutional Strengthening
- Provision of out-of-school hour's child care
- Public education programmes
- Research and development of resource materials
- Scholarship
- Training of Early Childhood Practitioners
- Upgrading/Equipping of Basic School and Resource

The 'List project impact (direct or indirect)' field is also visible below the dropdown.

City: - if your city/town/community is not listed, select the city/town/community nearest to you.

## Project Budget & Schedule

Total Project Cost: - state here the entire estimated or definitive amount that the entire project is expected to cost. For scholarship applicants, this would be your entire estimated school expenses (tuition, books, residence).

Total requested from CHASE: - state here the amount you wish for CHASE to contribute to the project.

Total Equity: - this is the amount that the applicant is putting forward to the project, if any. Leaving this field at 0 is acceptable.

Total from Other Sources: - if any other entity is providing funding for the project. Leaving this field at 0 is acceptable as it is populated from the sum of the “State Other Sources” fields.

State Other Sources: - state the name and amount from each of the “Other source” funding the project one at a time. You must click the “add” button to submit. If there are no other funding sources, you should leave these fields blank. The “Commitment” field indicates if the “Other Source” has already formally confirmed that they will be providing the funds.

*Project Budget and Schedule: Example 1 – A project is estimated to cost \$500,000, and the applicant is requesting that \$500,000 from CHASE.*

Project Budget and Schedule			
Total Project Cost (J\$) *	<input type="text" value="500,000"/>	Total requested from CHASE (J\$) *	<input type="text" value="500,000"/>
Total Equity (J\$) *	<input type="text" value="0"/>	Total from Other Sources (J\$) *	<input type="text" value="0"/>
State other sources	Name * <input type="text"/>	Amount * <input type="text"/>	Select... <input type="button" value="Add"/>
<input type="text" value="There are no other sources stated for this application."/>			

*Project Budget and Schedule: Example 2 – A project is estimated to cost \$500,000, and the applicant is requesting that \$350,000 from CHASE, the applicant already has or will secure \$150,000 to contribute.*

Project Budget and Schedule				
Total Project Cost (J\$) *	<input type="text" value="500,000"/>	Total requested from CHASE (J\$) *	<input type="text" value="350,000"/>	
Total Equity (J\$) *	<input type="text" value="150,000"/>	Total from Other Sources (J\$) *	<input type="text" value="0"/>	
State other sources	Name *	Amount *	Select... ▼	Commitment * Select... ▼ <input type="button" value="Add"/>
<input type="text" value="There are no other sources stated for this application."/>				

*Project Budget and Schedule: Example 3 – A project is estimated to cost \$500,000, and the applicant is requesting that \$270,000 from CHASE, the applicant already has or will personally secure \$100,000 to contribute, and then there is another organization funding 130,000 of the project.*

Project Budget and Schedule														
Total Project Cost (J\$) *	<input type="text" value="500,000"/>	Total requested from CHASE (J\$) *	<input type="text" value="270,000"/>											
Total Equity (J\$) *	<input type="text" value="100,000"/>	Total from Other Sources (J\$) *	<input type="text" value="130,000.00"/>											
State other sources	Name *	Amount *	Select... ▼	Commitment * Select... ▼ <input type="button" value="Add"/>										
<table border="1"> <thead> <tr> <th>Source</th> <th>Amount</th> <th>Currency</th> <th>Amount (J\$)</th> <th>Commitment</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Blue Grove Upliftment Fund</td> <td>130,000.00</td> <td>Jamaican dollar</td> <td>130,000.00</td> <td>Yes</td> </tr> </tbody> </table>					Source	Amount	Currency	Amount (J\$)	Commitment	<input checked="" type="checkbox"/> Blue Grove Upliftment Fund	130,000.00	Jamaican dollar	130,000.00	Yes
Source	Amount	Currency	Amount (J\$)	Commitment										
<input checked="" type="checkbox"/> Blue Grove Upliftment Fund	130,000.00	Jamaican dollar	130,000.00	Yes										

*Project Budget and Schedule: Example 4 – A project is estimated to cost \$500,000, and the applicant is requesting that \$200,000 from CHASE, and there is another organization funding 300,000 of the project.*

**Project Budget and Schedule**

Total Project Cost (J\$) *	<input type="text" value="500,000"/>	Total requested from CHASE (J\$) *	<input type="text" value="200,000"/>
Total Equity (J\$) *	<input type="text" value="0"/>	Total from Other Sources (J\$) *	<input type="text" value="300,000.00"/>

State other sources

Name \*  Amount \*   Commitment \*

Source	Amount	Currency	Amount (J\$)	Commitment
<input checked="" type="checkbox"/> Blue Town High Past Students Association	300,000.00	Jamaican dollar	300,000.00	Yes

*Project Budget and Schedule: Example 5 – A project is estimated to cost \$500,000, and the applicant is requesting that \$250,000 from CHASE, and there are two Other Sources contributing 100,000 and 150,000 respectively.*

**Project Budget and Schedule**

Total Project Cost (J\$) *	<input type="text" value="500,000"/>	Total requested from CHASE (J\$) *	<input type="text" value="250,000"/>
Total Equity (J\$) *	<input type="text" value="0"/>	Total from Other Sources (J\$) *	<input type="text" value="250,000.00"/>

State other sources

Name \*  Amount \*   Commitment \*

Source	Amount	Currency	Amount (J\$)	Commitment
<input checked="" type="checkbox"/> Yellow Park Foundation	100,000.00	Jamaican dollar	100,000.00	Yes
<input checked="" type="checkbox"/> Curly Tree Association	150,000.00	Jamaican dollar	150,000.00	No

Note that in all cases, the Total requested from CHASE, Total Equity, and Total from Other Sources, MUST precisely add up to the Total Project Cost.

### Proposed Implementation Dates

Select the identified dates of when the project is intended to start and end. For scholarship applicants, this is the beginning and end of the school enrollment period being applied for funding to cover.

The format that the date should be written in is dd/mm/yyyy, example - June 1, 2016 is written 01/06/2016. There may be a calendar icon displayed in your browser that you may click on to pick a date from a popup calendar. If the calendar icon does not appear, then type the date directly in the field using the required format.



### Proposed Implementation Dates

Project Start Date \*

01/06/2016

Project End Date \*

28/10/2016

## Produce Budget and Implementation Schedule

Schedule type: - select from the drop down list your project schedule in either, duration of **months**, or, specific **dates**.

Example of your schedule could be: Month 1 to buy stove, Month 2 to buy bathroom fixtures. Etc.

Another Example is July 1<sup>st</sup> to start roofing, August 1<sup>st</sup> to start flooring, etc.

Activity: - this is to break down tasks and/or materials into phases, e.g. building and installing gate, repairing roof, buying chairs, tuition, textbooks, buying musical instrument, etc. The amounts declared for each item, **MUST** add up to the total project cost.

Activity Funding Source: - For each activity, an indication of whose part of the funding is to be allocated to cover the cost is required. This is the distribution between total amount requested from CHASE, equity, and other sources, if any.

In "Activity example 1" below shows for a project activity "Item Cost" of 400,000. In activity funding source, CHASE contribute 250,000 and the remaining 150,000 is from a "other source".

### "Activity example 1"

Proposed Implementation Dates	
Project Start Date *	01/06/2016
Project End Date *	28/10/2016
Produce Budget and Implementation Schedule *	
Schedule Type	Date
Activity *	Paint Entire Building
Type *	Works
Date *	01/06/2016
Unit Cost *	400,000
Quantity *	1
Items Cost	400,000.00
Currency *	Jamaican dollar
Activity Funding Source	
CHASE	250,000
Equity	0
Other Source	150,000
Curly Tree Association	
Add	
There are no items defined for this application's budget and schedule.	

CLICK THE ADD BUTTON TO SAVE THE ENTRY

**Proposed Implementation Dates**

Project Start Date \*   Project End Date \*

**Produce Budget and Implementation Schedule \***

Schedule Type

Activity \*  Type \*   Date \*

Unit Cost \*  Quantity \*  Items Cost  Currency \*

Activity Funding Source

CHASE  Equity  Other Source

	Item Name	Item Type	QTY	Cost	Total Cost	Curre
<input type="button" value="X"/>	Paint Entire Building	Works	1	400,000.00	400,000.00	Jamaican c

<  >

In an exclusively funded CHASE project, Item Cost will be allocated in the CHASE field under activity funding source as seen for “Activity example 2”.

“Activity example 2”

Project Budget and Schedule			
Total Project Cost (J\$) *	48,000	Total requested from CHASE (J\$) *	48,000
Total Equity (J\$) *	0	Total from Other Sources (J\$) *	0.00
State other sources			
Name *	Amount *	Select...	Commitment * Select... Add
There are no other sources stated for this application.			
Proposed Implementation Dates			
Project Start Date *	01/06/2016	Project End Date *	28/10/2016
Produce Budget and Implementation Schedule *			
Schedule Type	Date		
Activity *	Rent chairs for the event	Type *	Goods
Unit Cost *	400	Quantity *	120
Items Cost	48000.00	Currency *	Jamaican dollar
Date *	01/06/2016	Add	
Activity Funding Source			
CHASE	48,000	Equity	0
Other Source	0	Select...	

## Applicant's Information

Alternative contact: - After filling in alternative contact information, click the add button.

Applicant is the beneficiary: - Tick this box if this is an application for your individual funding, e.g. scholarship, medical assistance. Otherwise, the name of Benefiting Institution is required.

## Reviewing the Status of your Application

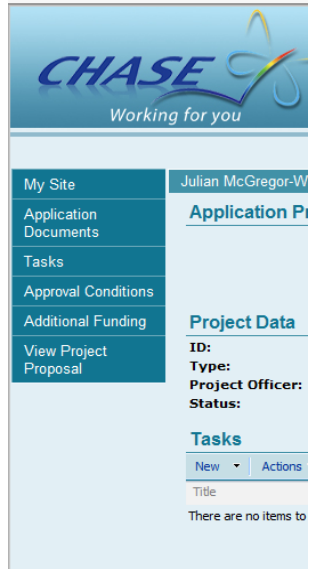
After filling out all required information, click the "Submit" at the bottom of the page.

To review your application, go to the applicant's homepage and click "my proposal" on the left menu.

To submit a new project, click "Funding Application" on the page.





## To submit additional documentation and information

click on “Application Documents” over on the left menu.











Click on the edit button beside the type of the document you are uploading.

Application Documents  
 Tasks  
 Approval Conditions  
 Additional Funding  
 View Project Proposal

- Click the  icon to edit the corresponding item.
- Click  to select the relevant file to be uploaded.
- Click  to upload the selected file.
- Click  to save the uploaded file.
- Click  to cancel item selection.





### Application Documents

New Document

Document Type	Mandatory	Comments	Attachments
Copy of TRN	Yes		Contains 0 attachment(s). 
Supporting information	Yes		Contains 0 attachment(s). 
Supporting information	Yes		Contains 1 attachment(s). 
Photograph	Yes		Contains 1 attachment(s). 
Acceptance Letter	Yes		Contains 1 attachment(s). 
Transcript	Yes		Contains 1 attachment(s). 
Essay	Yes		Contains 1 attachment(s). 
Resume	Yes		Contains 1 attachment(s). 











Click on browse to locate it on your computer, then click the save button.

Application Documents  
 Tasks  
 Approval Conditions  
 Additional Funding  
 View Project Proposal

- Click the  icon to edit the corresponding item.
- Click  to select the relevant file to be uploaded.
- Click  to upload the selected file.
- Click  to save the uploaded file.
- Click  to cancel item selection.

### Application Documents

New Document

Document Type	Mandatory	Comments	Attachments
Copy of TRN	Yes		Contains 0 attachment(s). 
Supporting information	Yes	<input style="width: 100%;" type="text"/>	<input type="button" value="Browse..."/>    There are no files attached to this item.
Supporting information	Yes		Contains 1 attachment(s). 
Photograph	Yes		Contains 1 attachment(s). 
Acceptance Letter	Yes		Contains 1 attachment(s). 
Transcript	Yes		Contains 1 attachment(s). 
Essay	Yes		Contains 1 attachment(s). 
Resume	Yes		Contains 1 attachment(s). 

If you do not see a document type/name that you wish to upload, then click on “New Document” to facilitate this new upload

**Application Documents: New Item**

Attach File Spelling... \* indicates a required field

**Document Type \***

**Mandatory**

**Comments**

**ProjectDocumentId**

OK Cancel

Put the document type to indicate what the document is about, example “Building Material Invoice”, “School Text Books Quotation”, etc.