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How do I get started?

The best way to act is to start a draft project page.

It is easier than what you may be thinking. There is no application, no grant paperwork. Simply click on “create a project”, answer the qualifying questions, and begin building a draft. After you start, you can save it and go back to it later. You can invite teammates to gain access to the (501(c)(3)) organization page. Once they sign-up they will be able to help you with the drafts you have started or create new ones; all project pages would be associated with your organization page.

STEP 1: REGISTER

To donate to your favorite cause, create an account by registering. You can find the Register button on the top right of our home screen as seen below.

You will then see a pop-up to create an account as seen below. You must submit the following information in order to have an account: **first name**, **last name**, a valid **email**, and a new **password**.

**Important note:** You must use a valid email address that you can access so that way in case you forget your password, you can receive further instructions to reset it.
If you already have made an account, please select the log-in tab as seen below and submit the following information: the email that you used to create your account and password that you used to create your account. **Do not create a new account if you already made one.**

**Forgot password:** If you forgot your password, please click on the “Forgot password?” text. You will then be prompted to submit your email as seen below so that you can reset your password. You can only reset your password by accessing your email, so you need to go to your email account to receive further instructions. These instructions are to reset your password by creating a new one.
Once you access your email, you should receive a message prompting you to reset your password as seen below by clicking on the ‘Reset Your Password’ button.

You will then be taken back to the CaringCrowd website where you will create a new password as seen on the next page.
STEP 2: CREATE A PROJECT

After you have signed up for CaringCrowd, you will come to your profile page. It is not required to connect to create a Biography, connect to LinkedIn or add a profile photo to support a project so you can immediately click on the ‘Create A Project’ Button at the top middle of your screen to get started!

Forgot email: If you forgot which email you used, please contact us at help@caringcrowd.org, and we will advise as soon as possible.
You will then be taken to this screen to answer the screening questionnaire. This begins when you click on ‘Get started’ as seen below.

The criteria questions are as follows:

1. My project is sponsored by a registered 501(c)(3) organization. (Yes/No)
2. My project addresses a legitimate and significant public health problem. (Yes/No)
3. My project reflects currently accepted medical practice and considers the safety of everyone involved. (Yes/No)
4. My project excludes any mentions or allusions to products or specific brands. (Yes/No)

After answering these screening questions with a matched fit, you will then be taken to the dashboard as seen below. This is where you input your project’s information. Much of this information will be required for you to answer, however, some are optional. In your project description, to emphasize the potential health impacts of your project to maximize chances of approval.
Towards the bottom of the screen, you will find two resources as seen below. These are here to help you create a successful campaign as well as guide you through the campaign journey even after the campaign closes.

**STEP 3: SUBMITTING YOUR PROJECT FOR REVIEW**
After you are done creating your draft, you will be taken to the Review page. Hit ‘Submit for final review’ as seen below and we will be in touch with you for our phone screen!
STEP 4: PHONE SCREEN
A member of the CaringCrowd team will schedule a phone call with you for a screening on the project’s status and if any changes need to be made. The CaringCrowd team will also email an additional project owner guide, which includes topics such as “the art science of setting the minimum funding goal” to help set up the campaign for success.

Passing the advisory panel review
The next step is to get reviewed by the advisory panel members.

You will still be able to tweak the description after it is sent to the advisors. However, the description of the underlying project must remain fundamentally the same as what we sent to the advisory panel. Common tweaks made during or after advisory panel review are adjustments to the funding goal, project title and/or campaign duration.

Advisors are allowed seven days to comment. After project approval, you are given the ability to publish at your own convenience and satisfaction!

STEP 5: LAUNCH
What exactly happens after our project description passes review?

You will have control over the exact moment your project page is published online. When it is in “approved” status, the project owner is the only entity that can click “start campaign,” which immediately makes the campaign live on the site.

See the status descriptions in the sidebar to the right. →

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**Project Page Status Types**

*Project pages have 4 possible statuses:*

1. **DRAFT**
   You can save partial drafts and return to them for further work later. It is only in “draft” or “pending information” modes that you can edit the page.

2. **SUBMITTED FOR REVIEW**
   Clicking “submit for review” is a necessary step on the way to publishing online (but NOT a necessary step to get your project page reviewed by the advisory panel. This is because the page is downloaded and sent to them via email). However, we strongly recommend you “submit for review” well in advance of your planned publication date so that you can see any missing information messages. By submitting the page for review, the site will warn you of any errors or missing information. No editing is possible in this mode, but you can see “Pending Information”.

3. **PENDING INFORMATION**
   After a page is submitted for review, an administrator can return it to “Pending Information” mode, which is the equivalent of “Draft” status, allowing editing. After any edits you make in “Pending Information” mode, you must ultimately submit the project page for review again to move it forward.

4. **APPROVED**
   An administrator has approved the project page (from submitted for review status). It is only from “Approved” status that the project page may be published online. Only the project owner can publish the page online, by logging in and clicking “start campaign”.

5. **PUBLISHED**
   This is the last step to making your project live and visible to anyone online. This status means you are able to accept pledges until the maximum funding amount has been reached or the campaign closes after hitting the minimum funding goal. IMPORTANT: The funding goal and campaign duration are no longer able to be changed once you publish your project. The only editing that is possible is made by the CaringCrowd Team upon specific request by email to help@caringcrowd.org.
Link (project web page) to use
All pledging must be done from your project page. Therefore, you need to get that web page link to your potential pledgers. In marketing your campaign, use the same project web page link as the project page had when it was in draft mode.

Important note: the web page address (link) will change if you change the title. Be sure to use the latest version of the web page address in your marketing.

CaringCrowd® campaign rules

1. Time-bound targets
   Campaigns must reach their Minimum Funding Goals by their deadlines, or pledges are cancelled.

2. Campaign durations
   Campaign durations are set by project owners. The minimum is 15 days and maximum 90 days. You can close a campaign (to collect the funds) any time before the deadline after reaching 100%.

Important note: If you chose the “campaign booster” feature before launching, you will have the option to extend the deadline after you pass the Minimum Funding Goal.