PADMISSION JOURNEY

SUBMITTING A FLEX FUND REQUEST FOR FURNITURE

Flex Fund Workflow Training Guide

WORKFLOW AT A GLANCE

Search Neighbor -> Submit Payment -> Furniture -> Tenancy: NONE -> Furniture One -> Enter Amount -> Leave Account & Invoice Blank -> Add a Hold OFF -> Enter Unit Address -> Complete Notes -> Upload Lease -> File Type: Other

FURNITURE REQUEST WORKFLOW

1 | SEARCH FOR THE NEIGHBOR

In the search bar, type the Neighbor's name.

2 | OPEN SUBMIT PAYMENT

Go to the Household Profile tab and click Submit Payment.

3 | SELECT EXPENSE TYPE

Under Expense Type, select "Furniture."

4 | SELECT TENANCY

Under Tenancy, select "NONE."

5 | SELECT VENDOR

Under Vendor, select "Furniture One."

6 | ENTER THE AMOUNT

Enter the cost of the package or individual item(s) in the Amount field.

7 | LEAVE ACCOUNT & INVOICE BLANK

Leave both the Account and Invoice fields blank.

8 | ENTER THE DATE

Enter the date the request is being made.

9 | VERIFY REPORTING PERIOD

The Reporting Period will auto-fill with the first day of the current month.

10 | TURN OFF "ADD A HOLD"

Ensure that "Add a Hold" is toggled OFF.

IMPORTANT - PROCESSING DELAY

If "Add a Hold" is left on, processing of the furniture request will be delayed.

11 | ENTER UNIT ADDRESS

Enter the Neighbor's complete Unit Address.

REQUIRED FIELD
The Unit Address must be entered as part of the furniture request.

12 | COMPLETE THE NOTES SECTION

In the Notes section, provide enough detail to identify the furniture order and coordinate delivery.

☐ Indicate the items being ordered a la carte, when applicable.

☐ List each requested item and the total amount requested.

☐ Requesting Agency.

☐ Service Provider/Case Manager Name.

☐ Service Provider/Case Manager Phone Number.

☐ Service Provider/Case Manager Email Address.

☐ Neighbor Phone Number.

EXAMPLE - FURNITURE ONE / SINGLE INDIVIDUAL
A la carte items: Queen Bed - $260; Dining Table - $100; 2 Chairs - $70; Delivery Fee - $75.
Total Requested: $505

MOVE-IN KIT REMINDER
Move-In Kits must be submitted separately. The Move-In Kit vendor is Life Startup Essentials. Final pricing varies by location.

13 | UPLOAD THE LEASE

Click "Upload Files" -> "Add a File to Upload" and upload the lease document.

LEASE REQUIREMENT
Ensure all household members are listed on the lease.

14 | SELECT FILE TYPE

Under File Type, select "Other."

FINAL REQUEST CHECK

☐ Correct Neighbor selected

☐ Expense Type is "Furniture"

☐ Tenancy is set to "NONE"

☐ Vendor is "Furniture One"

☐ Amount matches the package or individual item(s) requested

☐ Account field is blank

☐ Invoice field is blank

☐ Date reflects the date the request is being made

☐ Reporting Period auto-filled correctly

☐ "Add a Hold" is toggled OFF

☐ Complete Unit Address is entered

☐ Notes identify a la carte items, when applicable

☐ Notes list requested item(s) and total amount

☐ Requesting Agency is included

☐ Service Provider/Case Manager name, phone number, and email address are included

☐ Neighbor phone number is included

☐ Lease is uploaded

☐ All household members are listed on the lease

☐ File Type is "Other"

KEY REVIEW PRINCIPLE

Ensure all entries are accurate and reflect eligible Flex Fund usage before completing the request.