PADMISSION JOURNEY

SUBMITTING A FLEX FUND REQUEST FOR A MOVE-IN KIT

Flex Fund Workflow Training Guide

WORKFLOW AT A GLANCE

Search Neighbor → Submit Payment → Move-In Kit → Tenancy: None → Life Startup Essentials → Enter Amount → Leave Account & Invoice Blank → Verify Hold Is Off → Complete Notes → Upload RFTA or Lease → Submit

MOVE-IN KIT 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 "Move In Kit."

4 | SELECT TENANCY

Under Tenancy, select "NONE."

5 | SELECT VENDOR

Under Vendor, select "Life Startup Essentials."

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 Move-In Kit request will be delayed.

11 | COMPLETE THE NOTES SECTION

In the Notes section, include the requested item(s), total amount requested, and the following:

☐ Requested item(s) and total amount requested

☐ Requesting Agency and Address

☐ Service Provider Name

☐ Service Provider Phone Number

☐ Service Provider Email Address

MOVE-IN KIT REMINDER

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

12 | UPLOAD REQUIRED DOCUMENTATION

Click "Upload Files" → "Add a File to Upload" and upload the RFTA or Lease document.

LEASE REQUIREMENT

If a Lease is uploaded, ensure all household members are listed on the lease.

13 | SELECT FILE TYPE

Under File Type, select "Other."

14 | SUBMIT

Review the request for accuracy and click Submit.

SUBMISSION WARNING

If any required step is missed, the submission will be denied. Review the request carefully before submitting.

FINAL REQUEST CHECK

☐ Correct Neighbor selected

☐ Expense Type is "Move In Kit"

☐ Tenancy is set to "NONE"

☐ Vendor is "Life Startup Essentials"

☐ Amount reflects 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

☐ Notes include requested item(s) and total amount

☐ Requesting Agency and Address are included

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

☐ RFTA or Lease is uploaded

☐ If using a Lease, all household members are listed

☐ File Type is "Other"

KEY REVIEW PRINCIPLE

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