

# How to request flex funding in HMIS

Instructions for service providers to request flex funding through Street Reach or HomeNow Indy.

Please email [StreetReach@CHIPIndy.org](mailto:StreetReach@CHIPIndy.org) for assistance or follow up on Street Reach requests.

Please email [HomeNow@RDOOR.org](mailto:HomeNow@RDOOR.org) for assistance or follow up on HomeNow Indy requests.

1 Go to the client's dashboard. Click "Client Enrollment and Client Services"

The screenshot shows a client dashboard with a left-hand navigation menu and a main content area. The navigation menu includes options for COVID-19 Intake, COVID-19 Vaccines, Profile, Common Client Assessments, Other Client Assessments, Client Enrollment and Client Services (highlighted with a red circle), and Vet Master List. The main content area displays client information for 'Bird, Big', including gender and ethnicity, and a table of Case Manager Assignments.

Indy Case Manager Assignments	
Case Manager	Period
▼ Active	
...	Danielle Bagg
	Since 01/06/2
▼ Inactive	
...	Matt Holland
	11/16/22 - 03/

## 2 Click "Flex Funding Referrals"

The screenshot shows a web application interface. On the left is a dark blue navigation sidebar with a white menu. The menu items are: Profile, Common Client Assessments, Other Client Assessments, Client Enrollment and Client Services (expanded), Enrollments, Referrals, Flex Funding Referrals (highlighted with an orange circle), Services, Quick Services, Indirect Services, CE Services, and Vet Master List. The main content area on the right has a header with a yellow cone icon. Below the header is a section titled 'Indy Case Manager Assignments' with a table. The table has columns for 'Case Manager' and 'Period'. It is divided into 'Active' and 'Inactive' sections. The 'Active' section shows a row for 'Danielle Bagg' with the period 'Since 01/06/2'. The 'Inactive' section shows a row for 'Matt Holland' with the period '11/16/22 - 03/'. Below this is a section titled 'Big's Enrollments'.

	Case Manager	Period
▼ Active		
...	Danielle Bagg	Since 01/06/2
▼ Inactive		
...	Matt Holland	11/16/22 - 03/

## 3 Click "Add New Flex Funding Referral"

The screenshot shows a web application interface. At the top right, there is a user profile icon with 'DB' and a notification bell icon. Below the header is a search bar with a back arrow and a help icon. The main content area has a text instruction: 'ent. To add a new referral, click the "Add New Flex Funding Referral" button.' Below this is a button with a plus sign and the text '+ Add New Flex Funding Referral'. Below the button, it says '20 results found.' Below that is a table with columns for 'To Provider', 'Referral Status', and 'Result'. The table has two rows: 'HomeNow Indy' and 'Street Reach Indy'.

To Provider	Referral Status	Result
HomeNow Indy		
Street Reach Indy		

4

Instructions for the request are provided at the top of the referral form. Please read these in detail before submitting a request. Once you are ready to submit a request, choose the referral service that indicates what you are requesting the funds for. Currently the following items can be paid for via this process:

Street Reach

- First Month's Rent
- Substance abuse treatment
- Relocation (i.e. Greyhound bus ticket)
- Birth Certificates/Vital Docs

HomeNow Indy

- Security Deposit
- Utility Arrears
- Application Fees
- Moving Expenses
- Utility Deposit
- PHA Debt/Rental Arrears

The screenshot shows a web form with the following fields:

- Referral Date:** A date input field containing "05/26/2023" with a calendar icon to its right.
- Referral Service:** A dropdown menu with "-- SELECT --" and a magnifying glass icon to its right.
- Enrollment:** A dropdown menu with "-- SELECT --" and a downward arrow icon to its right.
- Refer to Provider:** A text input field with a red "x" icon and a magnifying glass icon to its right.
- Referred From:** A text input field with a magnifying glass icon to its right.

Below the "Refer to Provider" field, there is a line of text: "al source as the Refer from Provider."

5 Select the reason for the funds.

Refer to Provider: \*

Refer from Provider.

Referred From:

Referred By:

Person:

Phone:

Requested: \*

- Problem Solving/Diversion/Rapid Resolution intervention or service
- Problem Solving/Diversion/Rapid Resolution intervention or service
- Referral
- Referral
- Referral to a Housing Stability Voucher
- Referral to a Housing Stability Voucher
- Referral to scheduled Coordinated Entry Crisis Needs Assessment
- Referral to scheduled Coordinated Entry Housing Needs Assessment
- Security Deposit
- SSVF
- SSVF
- SSVF Self-Match
- SSVF Self-Match
- SSVF Self-Match
- SSVF Self-Match
- Street Reach Referral
- Street Reach Referral

Vendor Address

Amount payable to

(if approved)

6 Choose the client's current enrollment in HMIS.

Referral Date: \* 05/26/2023

Referral Service: \* Security Deposit

Enrollment: \* --SELECT--


Refer to Provider: \*


Original source as the Refer from Provider.


Referred From:

Referred By: Danielle Baqq

7 Choose the client's current enrollment in HMIS.

Referral Date: \* 05/26/2023 

Referral Service: \* Security Deposit 

Enrollment: \* -- SELECT -- 

Refer to Provider: \* -- SELECT --


- 05/25/2023 - PIH/Anthem - Safe Haven - SH
- 05/25/2023 - HRZ - Day Shelter - DS - CoC
- 05/24/2023 - HIP Holistic Housing Diversion
- 03/29/2023 - DII - Downtown Outreach - SO
- 01/30/2023 - YLY - System Navigation - SSO - YHDP
- 01/06/2023 - HNI - HOME ARP - SSO - HH
- 12/19/2022 - HVAF - Villa - PH
- 12/15/2022 - PBSO - Street Outreach
- 12/02/2022 - OUT - Outreach Inc - DS


source as the Refer from Provider.


Referred From:



Referred By:

8 Click "Search for Refer to Provider"


Referral Date: \* 05/26/2023 


Referral Service: \* Security Deposit 

Enrollment: \* 05/25/2023 - PIH/Anth 

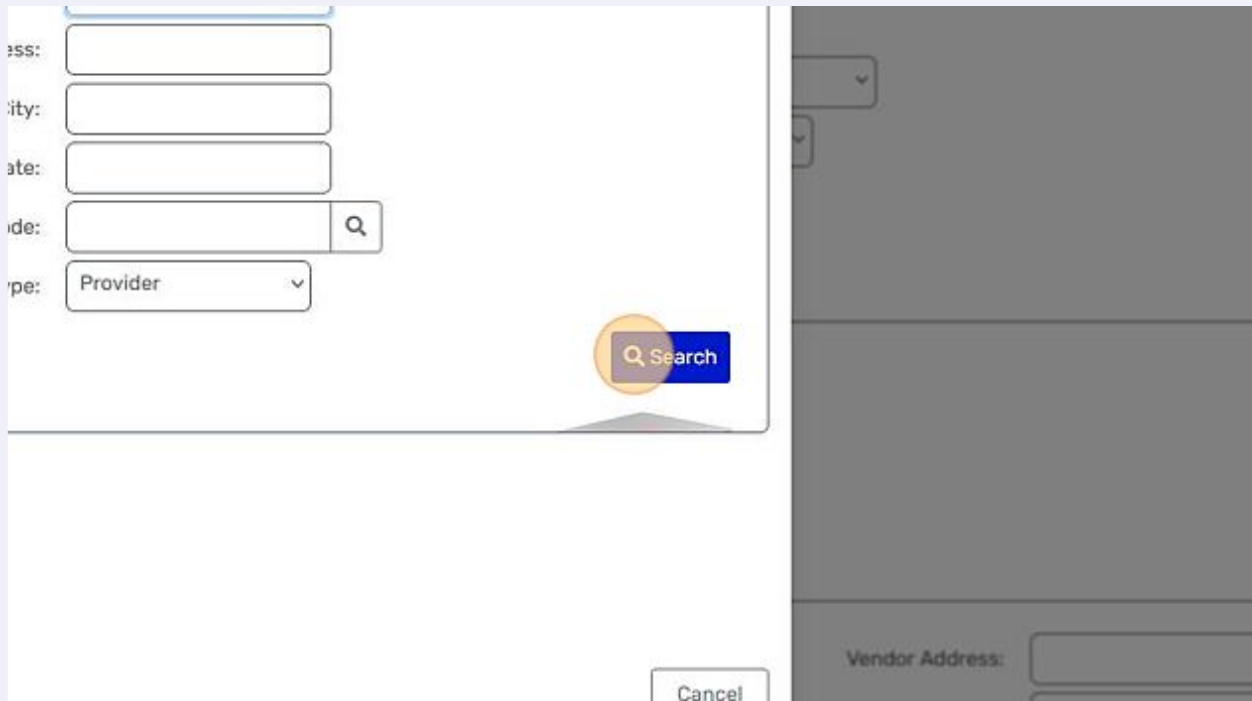
Refer to Provider: \*  

Provider:

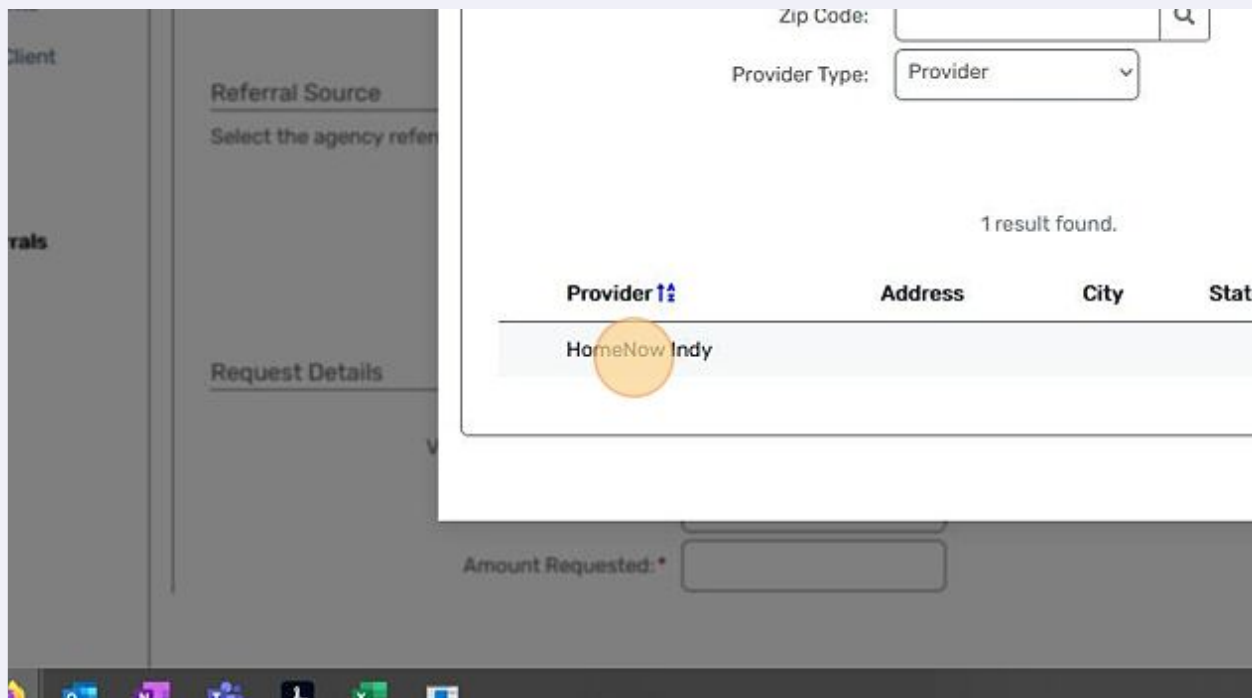
Referred From: 

Referred By: Danielle Bagg 

9 Click "Search"



10 The provider list will automatically display Street Reach or HomeNow, depending on which funding source covers that expense. Choose the one displayed.



11 Fill out the entire form with as much information as you have available.

Select the agency referral source as the Refer from Provider.

Referred From:

Referred By:

---

**Request Details**

Vendor Contact Person:

Vendor Phone:

Amount Requested: \*

Request Reason AND Client Location:

12 Fill out the entire form with as much information as you have available.

ClientTrack | Airtale | Indianapolis Contin... | Profile - chp2473 | Sub... | ClientTrack - Training | Hub - Planner | Google Sheets | Slack | Jobs | CoC ABs... | ChatGPT | Eva | IHMS Data Standard... | CHP Notion | Excel Formula Generat... | Sonia - M School of S.

Search

Clients / Flex Funding Referrals / Referral

Big Bird | 11/1/1995 | ClientID: 166599

**Referral**

Referral Source

Select the agency referral source as the Refer from Provider.

Referred From:

Referred By:

---

**Request Details**

Vendor Contact Person:

Vendor Address:

Vendor Phone:

Check made payable to:

Amount Requested: \*

Method of Payment (if approved): -- SELECT --

Request Reason AND Client Location:

---

**Invoice**

Upload documentation of funds needed

+ Add File

Display: Icons Grid

13 Fill out the entire form with as much information as you have available.

Search

Search

Vendor Address:

Check made payable to:

Method of Payment (if approved): -- SELECT --

14 Fill out the entire form with as much information as you have available.

Profile - chp7478 | Tab... ClientTrack - Training Hub - Planner Google Sheets Slack (jobs) | CoC All... ChatGPT Eva HMS Data Standards... CHP Notes Excel Formula Generat... Sonia - IJ School of S... Video Conferencing ...

Clients / Flex Funding Referrals / Referral

Big Bird 11/1/1995 ClientID 166599

**Referral**

Referral Source  
Select the agency referral source as the Refer from Provider.

Referred Firm:

Referred By: Danielle Bagg

Request Details

Vendor Contact Person: John Ron

Vendor Address: 125 Main St

Vendor Phone:

Check made payable to:

Amount Requested:

Method of Payment (if approved): -- SELECT --

Request Reason AND Client Location:

Invoice  
Upload documentation of funds needed

Display: None Grid

+ Add File Multi File Download

Save Cancel



15 Fill out the entire form with as much information as you have available.

Referred By:

---

**Request Details**

Vendor Contact Person:

Vendor Phone:

Amount Requested: \*

Request Reason AND Client Location:

---

**Invoice**

Upload documentation of funds needed

16 Fill out the entire form with as much information as you have available.

Search

Clients / Flex Funding Referrals / Referral

Big Bird 11/1/1995 Client ID 166599

**Referral**

Referral Source

Select the agency referral source as the Referral Provider.

Referred From:

Referred By:

---

**Request Details**

Vendor Contact Person:

Vendor Address:

Vendor Phone:

Check made payable to:

Amount Requested: \*

Method of Payment (if approved):

Request Reason AND Client Location:

---

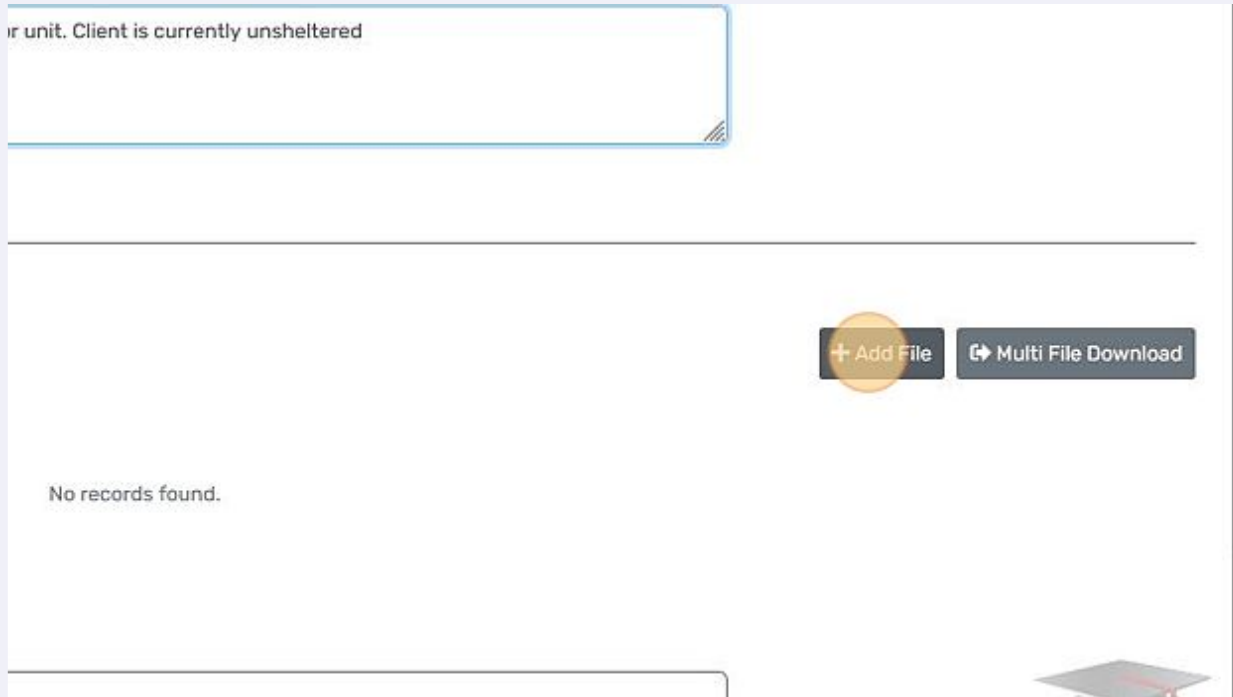
**Invoice**

Upload documentation of funds needed

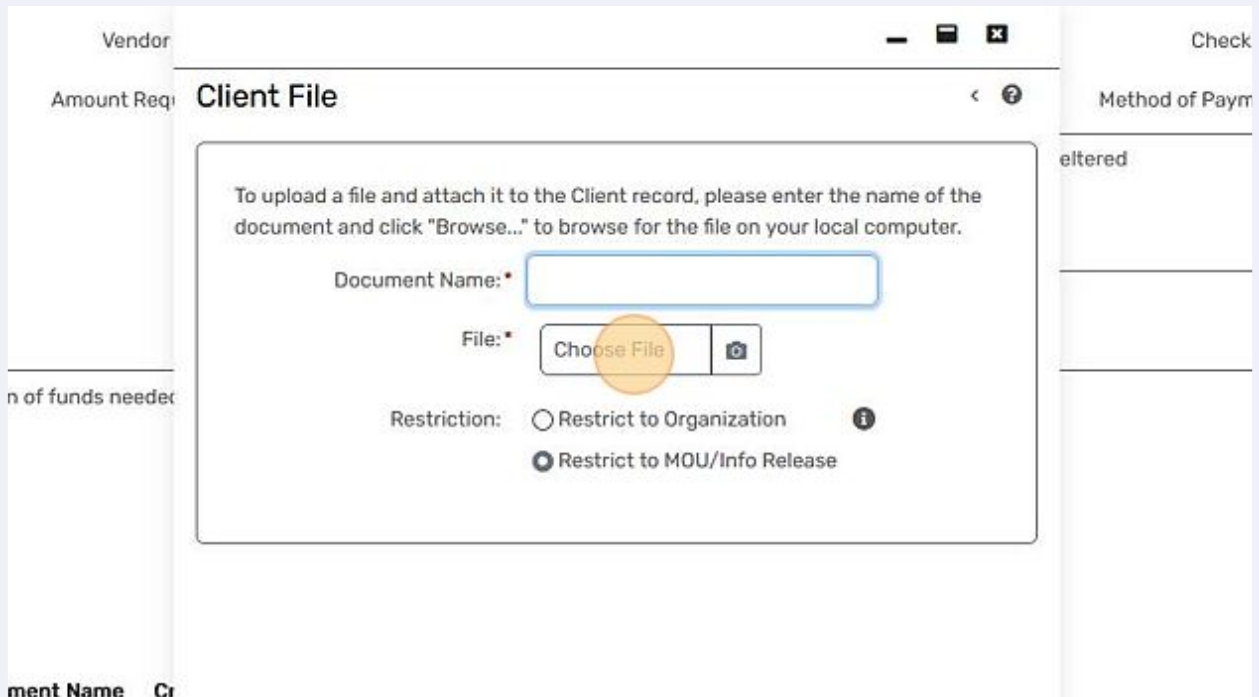
+ Add File

Display: Icons Grid

17 If you have a document to upload, click the "+Add File" button.



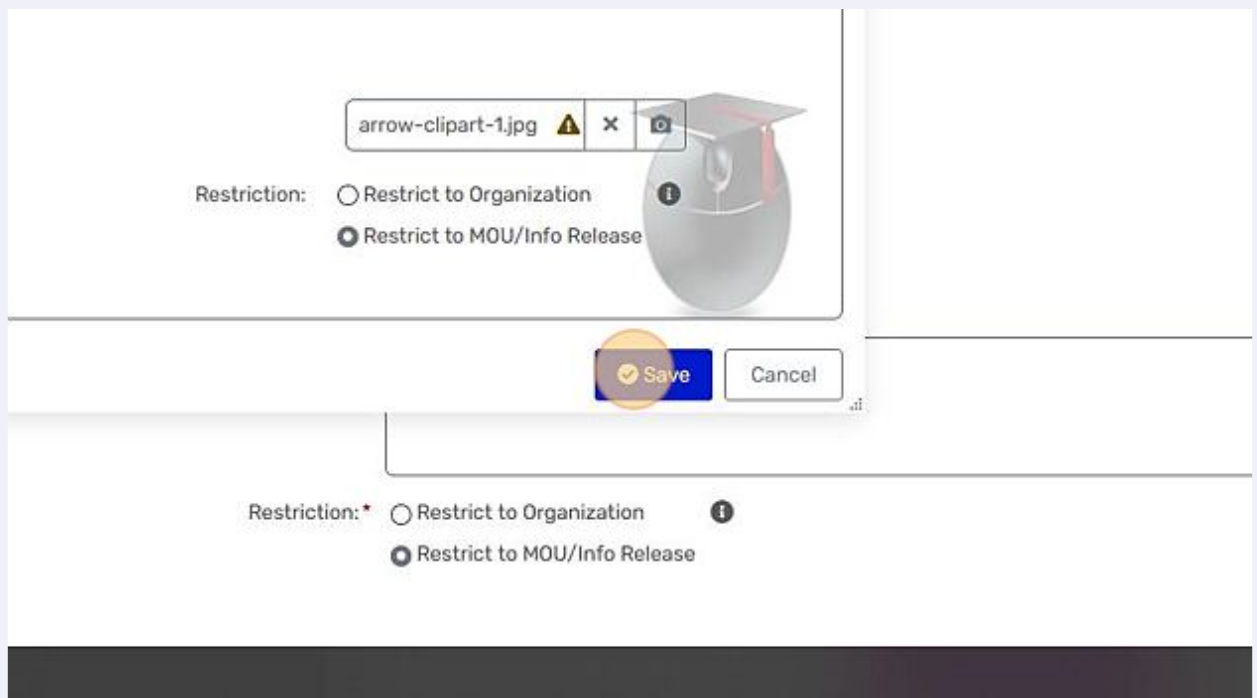
18 This will pop open a new window. Click "Choose File" to upload a document from your device.



19 Click "Document Name" and enter in a name for the document

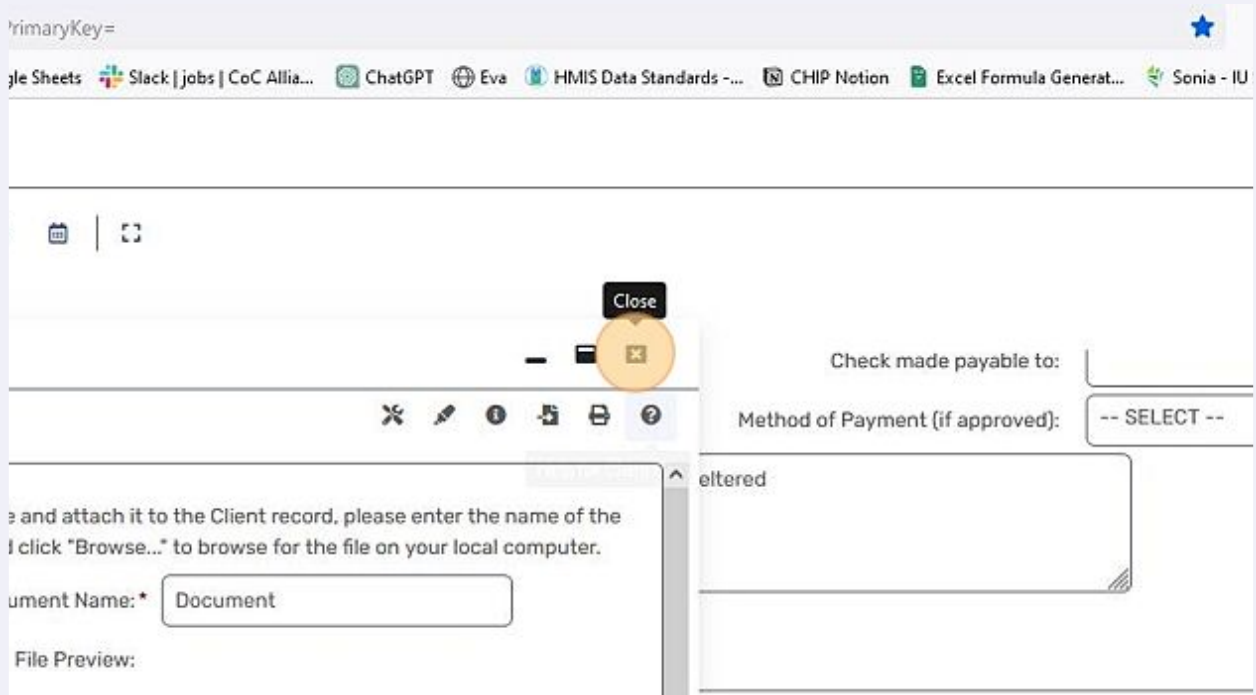


20 Click "Client File"



21

Once you click Save, it will not appear that anything happened, but I assure you, it saved. If you click save again, you will get an error. Disregard. Click "Close"



22

Fill out the entire form with as much information as you have available.




23 Once the form has been filled out, click "Save"

No records found.

er helpful. Big Bird's rent will be paid by an ongoing voucher.

ization ⓘ  
Info Release



Save Cancel

3:19 PM  
5/26/2023

24 You will now see the request under the referrals section of the client's dashboard.

Big Bird 11/1/1995 166599

Disability Verification: ✖

Big's Referrals

Displaying 1-1

Service	Referral Date	To Pro
Security Deposit	05/26/2023	HomeN
HomeNow Indy Referral	05/23/2023	HomeN
First Month's Rent	05/23/2023	Street F
Payment for ID or Documentation	05/23/2023	HomeN
CEE - DRU Referral	05/18/2023	Colony

25

You can also go back to "Flex Funding Referrals" to see the list of referrals that have been made or to submit a new request. You will also be able to see the status of the referral (Received) and the result. Attained means it was approved for pay out. Not attained means it was rejected.

The screenshot shows a web application interface for a client dashboard. The left sidebar contains navigation options such as 'Client Dashboard', 'Add Client', 'Find Client', 'Intake', 'Indy Non-HMIS Workflow', 'COVID-19 Intake', 'COVID-19 Vaccines', 'Profile', 'Common Client Assessments', 'Other Client Assessments', 'Client Enrollment and Client Services', 'Enrollments', 'Referrals', 'Flex Funding Referrals', 'Services', 'Quick Services', 'Indirect Services', 'OE Services', and 'Vet Master List'. The main content area displays the client's information: 'Big Bird', 'TVV/1995', 'Client ID 166599', and a 'Disability Verification' status with a red 'x' icon. Below this is a section titled 'Big's Referrals' which contains a table with the following columns: 'Service', 'Referral Date', 'To Provider', 'Referral Status', and 'Status'. The table lists 12 referrals, including 'Security Deposit', 'HomeNow Indy Referral', 'First Month's Rent', and 'Payment for ID or Documentation'. The 'Referral Status' column shows 'Received' for some items and 'New' for others. A 'Flex Funding Referrals' menu item in the sidebar is circled in orange.

Service	Referral Date	To Provider	Referral Status	Status
Security Deposit	05/06/2023	HomeNow Indy		New
HomeNow Indy Referral	05/23/2023	HomeNow Indy		New
First Month's Rent	05/23/2023	Street Reach Indy		New
Payment for ID or Documentation	05/23/2023	HomeNow Indy	Received	New
CES - RRH Referral	05/18/2023	Colum Place RRH - CES	Received	New
Payment for ID or Documentation	03/30/2023	Street Reach Indy		New
Payment for ID or Documentation	03/30/2023	Street Reach Indy		New
CES - ES Referral	03/30/2023	VOA Contract - CES		New
Payment for ID or Documentation	03/30/2023	Street Reach Indy		New
Payment for ID or Documentation	03/30/2023	Street Reach Indy		New

26

Click the action button to edit the referral. You can use this if you need to add additional information later.

This screenshot shows a close-up of the 'Flex Funding Referrals' section in the client dashboard. The left sidebar is partially visible, showing navigation options like 'Find Client', 'Intake', 'Indy Non-HMIS Workflow', 'COVID-19 Intake', 'COVID-19 Vaccines', 'Profile', 'Common Client Assessments', 'Other Client Assessments', 'Client Enrollment and Client Services', 'Enrollments', 'Referrals', and 'Flex Funding Referrals'. The main content area displays a list of referrals under the heading 'This page lists all of the Flex Funding referrals (Street Reach and HomeNow Indy Referrals)'. The list includes: 'Security Deposit', 'HomeNow Indy Referral', 'First Month's Rent', 'Payment for ID or Documentation', 'CES - RRH Referral', and 'Payment for ID or Documentation'. Each item has a three-dot action button to its left. A tooltip labeled 'Actions for Security Deposit' is shown over the first item's action button, which is circled in orange.

27

Click "Edit Flex Funding Referral" to open the referral back up. You can use this if you need to add additional information later.

This page lists all of the Flex Funding referrals (Street Reach and HomeNow Inc

Service	Refer
Security Deposit	05/20
Edit Referral	05/20
<b>Edit Flex Funding Referral</b>	05/20
Referral Outcome	05/20
Delete Referral	05/20
Payment for ID or Documentation	05/20
CES - RRH Referral	05/18
Payment for ID or Documentation	03/30
Payment for ID or Documentation	03/30

28

Once you go back into the referral, you will see the file that you uploaded when you created the referral request.

11/1/1995 166599

or funds needed

Display: Icons Grid

1 result found.

Document Name	Created Date	Download File
IPM		

Information you would like the committee to know when considering this request:

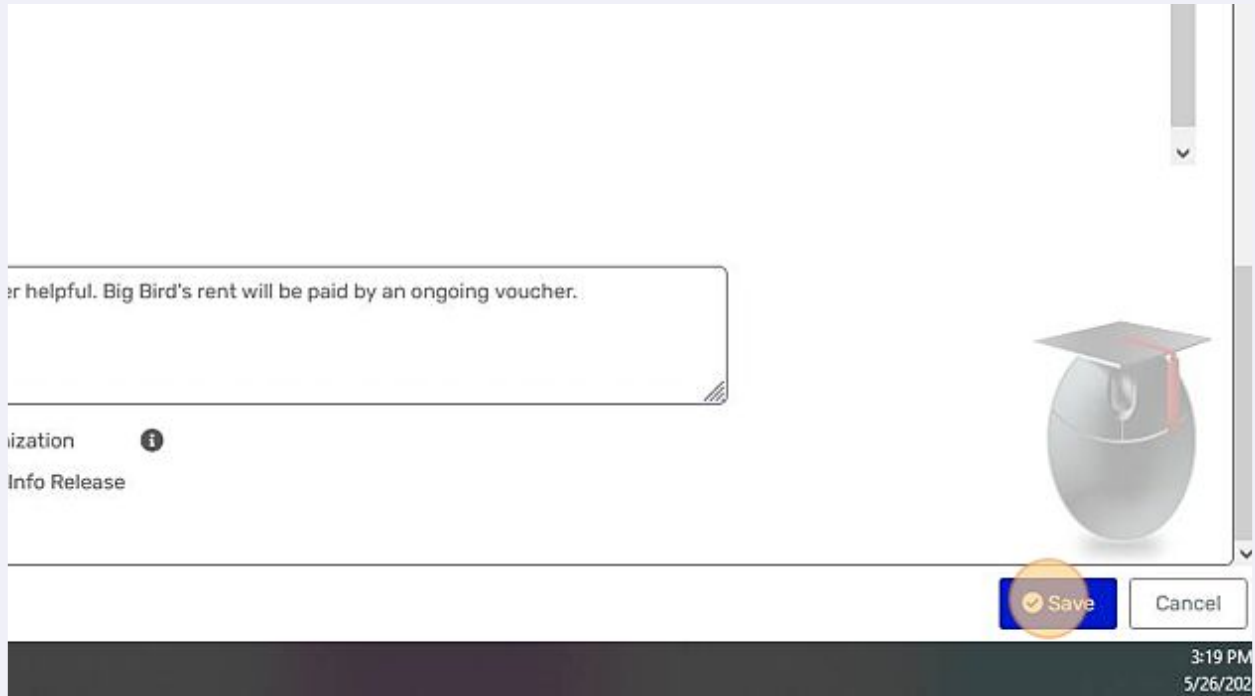
This would be super helpful. Big Bird's rent will be paid by an ongoing voucher.

Restriction:\*

Restrict to Organization

Restrict to MOU/Info Release

29 Click "Save" to save any changes and to exit.



## Street Reach Referrals

30 This next section will provide the same instructions but show you what it looks like to submit a request to Street Reach instead of HomeNow Indy.



31 Click "Add New Flex Funding Referral"

ent. To add a new referral, click the "Add New Flex Funding Referral" button.

+ Add New Flex Funding Referral

21 results found.

To Provider	Referral Status	Result
HomeNow Indy		
HomeNow Indy		

32 Click "Referral Service."

Referral Date: \* 05/26/2023

Referral Service: \* -- SELECT --

Enrollment: \* -- SELECT --

Refer to Provider: \*

se as the Refer from Provider.

Referred From:

33 Choose the reason for the request.

Source as the Refer from Provider.	Problem Solving/Diversion/Rapid Resolution intervention or service Referral
Referred From:	Referral
Referred By:	Referral to a Housing Stability Voucher
	Referral to a Housing Stability Voucher
	Referral to scheduled Coordinated Entry Crisis Needs Assessment
	Referral to scheduled Coordinated Entry Housing Needs Assessment
	Security Deposit
	SSVF
	SSVF
Contact Person:	SSVF Self-Match
Vendor Phone:	SSVF Self-Match
Amount Requested: *	SSVF Self-Match
	SSVF Self-Match
	Street Reach Referral
	Street Reach Referral


34 Choose an open enrollment


Referral Date: *	05/26/2023
Referral Service: *	Street Reach Referral
Enrollment: *	-- SELECT --
Refer to Provider: *	-- SELECT --
Source as the Refer from Provider.	05/25/2023 - PIH/Anthem - Safe Haven - SH
Referred From:	05/25/2023 - HRZ - Day Shelter - DS - CoC
Referred By:	05/24/2023 - HIP Holistic Housing Diversion
	03/29/2023 - DII - Downtown Outreach - SO
	01/30/2023 - YLY - System Navigation - SSO - YHDP
	01/06/2023 - HNI - HOME ARP - SSO - HH
	12/19/2022 - HVAF - Villa - PH
	12/15/2022 - PBSO - Street Outreach
	12/02/2022 - OUT - Outreach Inc - DS
	11/05/2022 - HFS - Holy Family Emergency Shelter - ES - ESG
Contact Person:	
Vendor:	


35 Click "Search for Refer to Provider"



CREFID:

---

Referral Date: \* 05/26/2023 


Referral Service: \* Street Reach Referral 


Enrollment: \* 03/29/2023 - DII - Do  Search for Refer to Provider

Refer to Provider: \*  


---


Provider:


Referred From:  

Referred By: Danielle Bagg  

36 Click "Search"



Provider 

 Search

---

Vendor Address:

37

For Street Reach eligible expenses, Street Reach Indy will show up as the only option for provider.

Referral Source  
Select the agency referral source

Request Details

zip code:

Provider Type:

1 result found.

Provider	Address	City	State
Street Reach Indy			

Amount Requested: \*

38

Fill out the rest of the form as completely as possible.

Select the agency referral source as the Refer from Provider.

Referred From:

Referred By:

Request Details

Vendor Contact Person:

Vendor Phone:

Amount Requested: \*

Request Reason AND Client Location:

39 Fill out the rest of the form as completely as possible.

Client Dashboard  
Add Client  
Find Client  
Intake  
Indy Non-HMS Workflow  
COVID-19 Intake  
COVID-19 Vaccines  
Profile  
Common Client Assessments  
Other Client Assessments  
Client Enrollment and Client Services  
Enrollments  
Referrals  
Flex Funding Referrals  
Services  
Quick Services  
Indirect Services  
DE Services  
Vet Master List

Big Bird 11/1/1995 ClientID 166599

### Referral

Referral Source  
Select the agency referral source as the Refer from Provider.

Referred From:   
Referred By: Danielle Bagg

### Request Details

Vendor Contact Person: Tim Smith  
Vendor Phone:   
Amount Requested: \*   
Request Reason AND Client Location:

Vendor Address:   
Check made payable to:   
Method of Payment (if approved): -- SELECT --

### Invoice

Upload documentation of funds needed

+ Add File

Display: Icons Grid

40 Fill out the rest of the form as completely as possible.

Referred By: Danielle Bagg

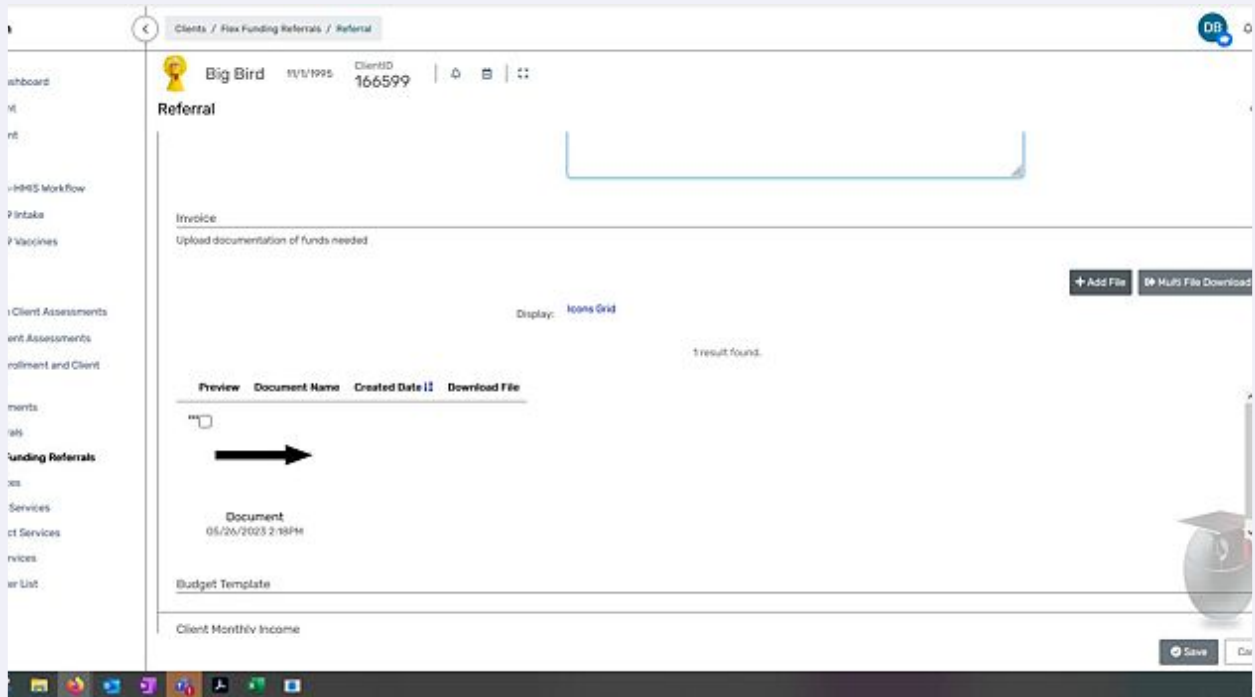
### Request Details

Vendor Contact Person: Tim Smith  
Vendor Phone:   
Amount Requested: \*   
Request Reason AND Client Location:

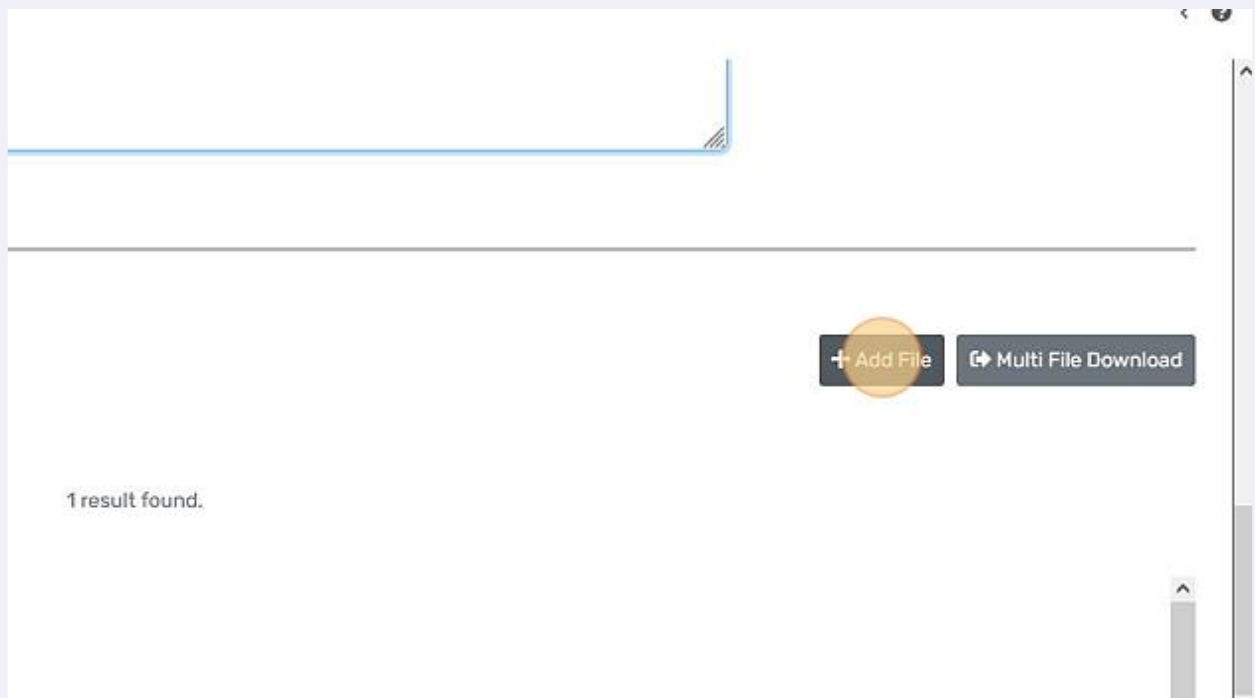
### Invoice

Upload documentation of funds needed

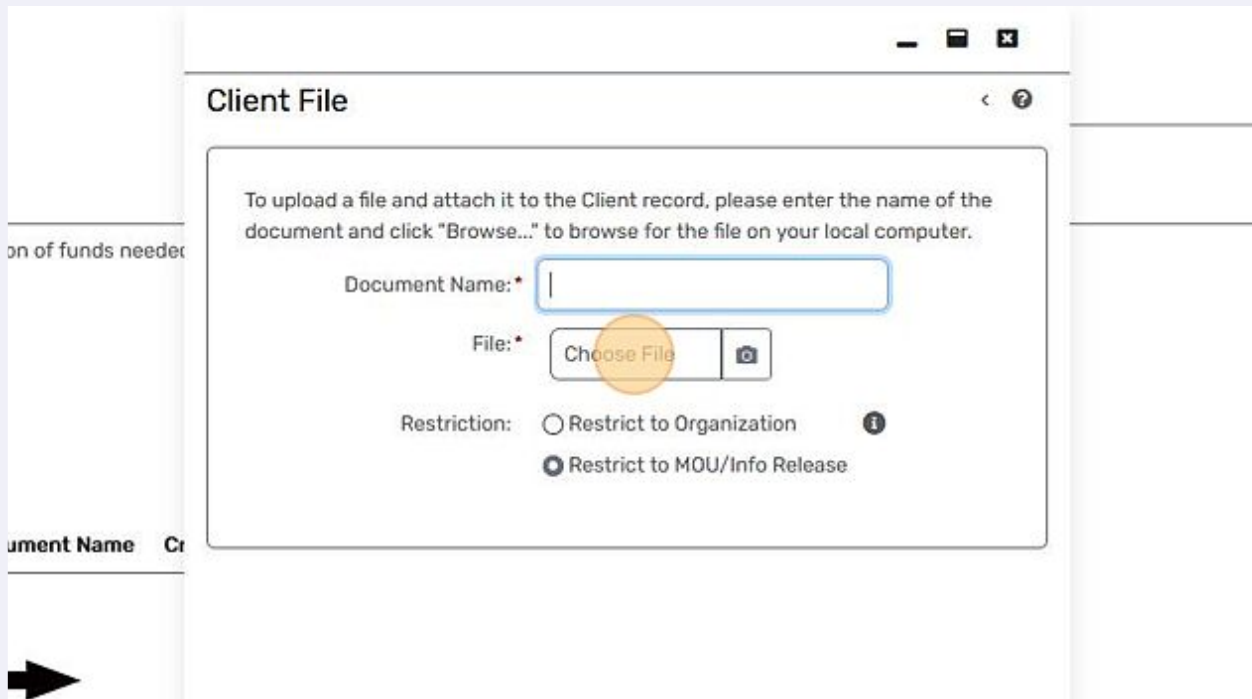
41 You'll see any documents that have previously been uploaded for this client.



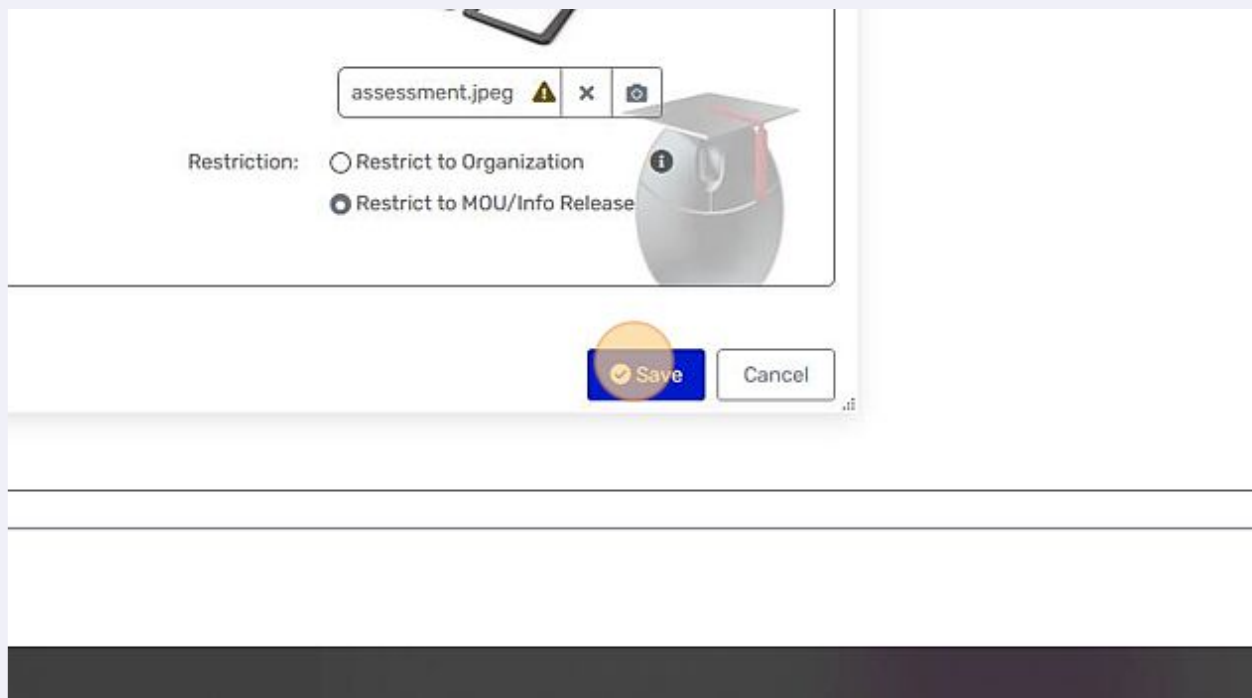
42 Click "+ Add File" to add another document



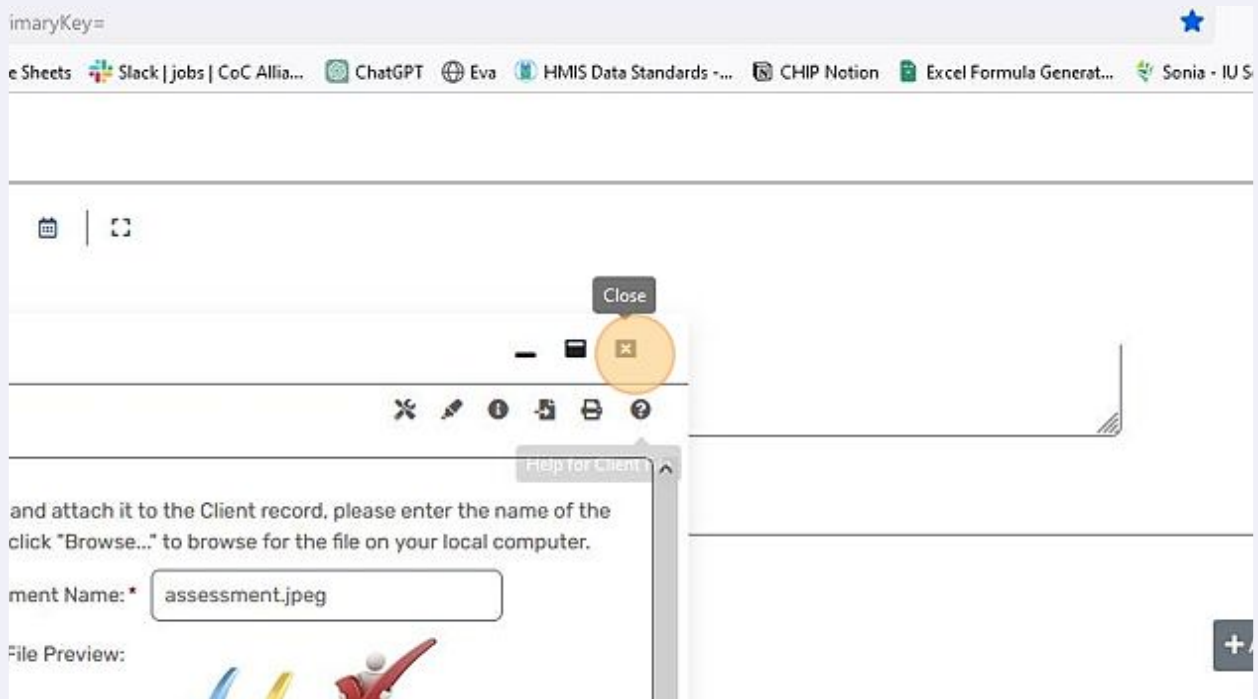
43 Click "Choose File"



44 Click "Save"



45 Click "Close"



46 Fill out the rest of the form as completely as possible.

1 result found.

**Download File**

---

Earned income after taxes: \*

Savings that client can access and use if needed:

Food stamps:

Disability:

ources (example: child support, regular gifts, etc):

Type of other income or resour

**Total Monthly Inco**



47

Street Reach requests will also display the budget and sustainability sections. Please complete these or your request may be denied.

48

Fill out the rest of the form as completely as possible.

49

Fill out the rest of the form as completely as possible.

arch Clients / Flex Funding Referrals / Referral

Big Bird 11/1/1995 ClientID 166599

**Referral**

Food and other supplies:

Car expenses (example: bus fares, car loan, insurance, parking, gas):

Amount of other expenses:

Type of other expenses:

Total Monthly Expenses: \$50.00

**Sustainability Plan**

Has client applied for any other resources or agency help: Yes

Which ones and what were the responses/contributions:

The last time the client received income was: MM/DD/YYYY

The client is expected to resume income on: MM/DD/YYYY

Notes and Additional Information you would like the committee to know when considering this request:

Restriction:  Restrict to Organization  Restrict to MOU/Info Release

Save

50

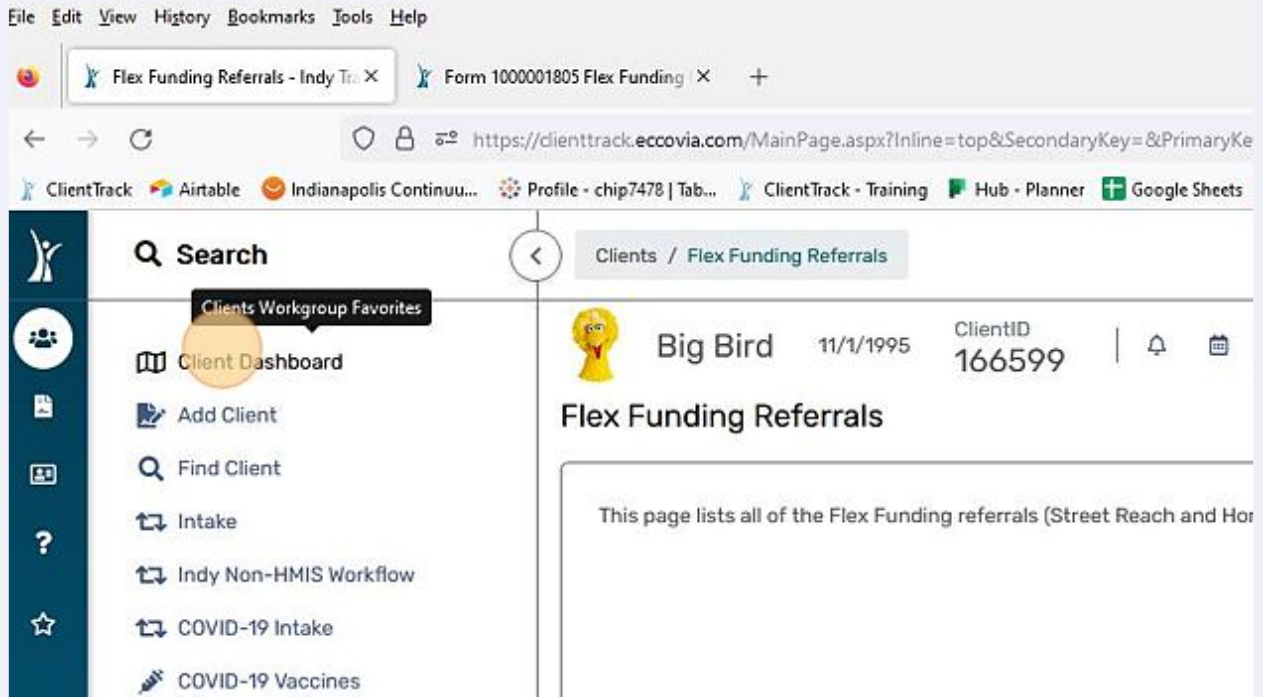
Click "Save"

ization  Restrict to Organization  Restrict to MOU/Info Release

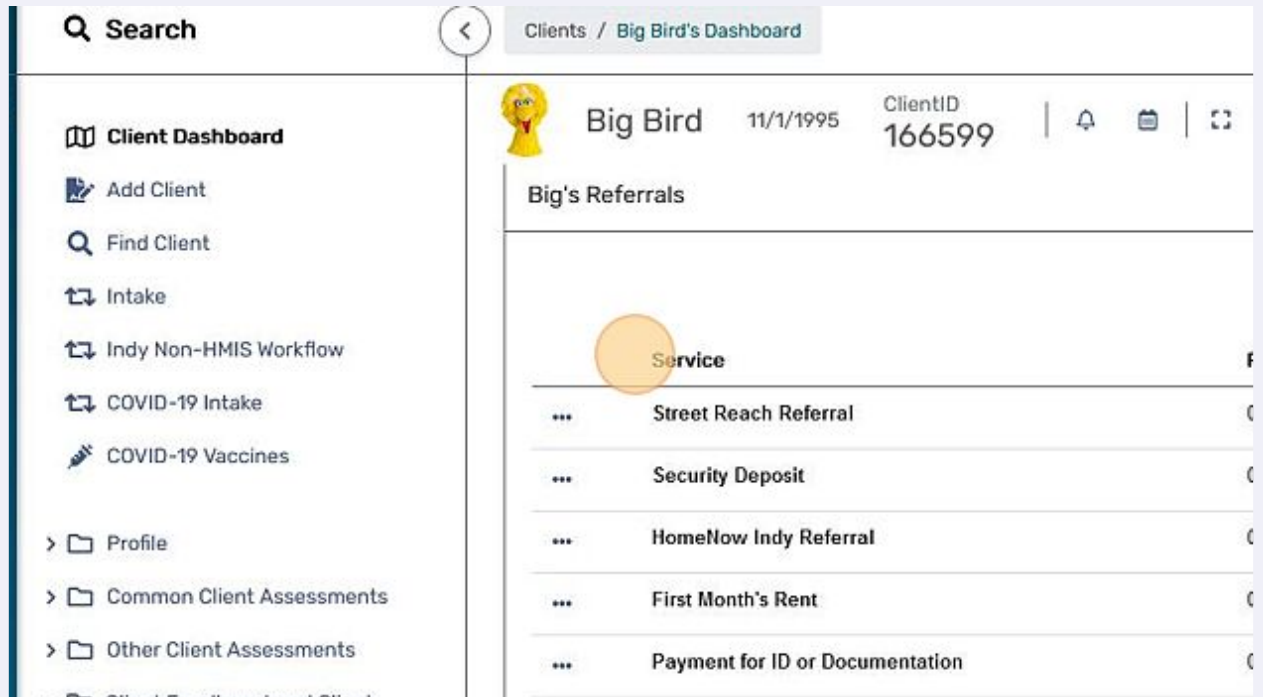
Save Cancel

3:21 PM 5/26/2022

51 Click "Client Dashboard"



52 You will now see the referral request in the Referrals or services section on the client's dashboard.



53

If you have any questions about this process, please email [StreetReach@chipindy.org](mailto:StreetReach@chipindy.org) for Street Reach requests or [HomeNow@RDOOR.org](mailto:HomeNow@RDOOR.org) for HomeNow Indy requests.