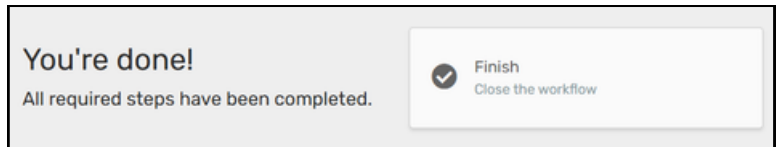


GRANTEES SERVING FAMILIES WITH INNOVATION FUNDS ARE REQUIRED TO COMPLETE ALL STEPS IN THIS GUIDE WHEN UTILIZING THEIR FUNDING.

Innovation Funds - HMIS Guide

BEGIN BY ENROLLING THE FAMILY IN THE INNOVATION FUNDS PROJECT

1. In the Head of Households' Client Dashboard, click the **Intake** button
2. Fill out each page of the intake workflow for each member of the household until you reach the prompt pictured below.



NOTE: Though it is labeled as not required, be sure to fill out the "Gender" field.

DOCUMENT EACH INSTANCE OF ASSISTANCE PROVIDED DURING A FAMILY'S ENROLLMENT.

Each time you provide a family with a service follow these steps to document it. Create a Case Note for the each instance of assistance provided.

1. Click on **Case Notes** in the left-hand menu panel from the head of household's dashboard.
2. Select **"Add a New Case Note"**
3. Type **"Innovation Funds"** into the **Regarding** field.
4. Select **"Innovation Fund"** from the **Template drop-down** options.
 - a. *NOTE: This template should only be used for this project.*
5. Provide a typed response to each question in the Case Note Template within the text box.

Properly Entering Case Notes Using the Innovation fund template

Be sure to select the Innovation Fund from the template drop down.

Please enter your answers after the dash behind the text Answer to Q1-, Answer to Q2-, etc. Please do NOT use dashes in your answer.

Innovation Fund Case Note

Enter a SEPERATE Case Note for each service provided.

[Click here for examples of answers to these questions](#)

- Q1. Location of family being served -	Answer to Q1 -
- Q2. Limited Accessibility Barrier? (Unmet support) -	Answer to Q2 -
- Q3. What is the dollar amount provided for this single service? -	Answer to Q3 -
- Q4. What is the purpose of this funding/what service are you providing? -	Answer to Q4 -
- Q5. Please enter either At Risk of Homelessness or Literally Homeless -	Answer to Q5 -

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Case Note response example:

The Head of Household for a family who is "At-Risk" of Homelessness has experienced a loss of transportation (car has broken down). They are seeking assistance with transportation to safeguard their job security and not be pushed further into crisis.

Direct Service Case Note:

1. Location of the Family Being Served?
a. ex: *Hidalgo County*
2. Limited Accessibility Barrier? (Unmet support)
 - *The current household is seeking assistance with transportation. Our agency only has access to bus passes.*
3. What is the dollar amount provided for this single service?
 - *\$535*
4. What is the purpose of this funding/what service are you providing?
 - *This service will address the families vehicle issue and ensure the head of household maintains their income.*
5. Please answer either At Risk of Homelessness or Literally Homelessness
 - *Literally homeless*

For questions, please reach out to housingsolutions@thn.org

EXIT THE FAMILY FROM THE INNOVATION FUNDS PROJECT

Once you have completed serving a family with Innovation Funds, exit them from the Innovation Funds Project.

1. Navigate to the Head of Household's dashboard in HMIS and click the **Action Button (three dots)** next to the family's Enrollment
2. Select **Exit the enrollment** and fill out each page of the exit workflow, for all family members, until you see the same "You're done" prompt. (*pictured above*)