

# Guide to Navigating the CAPS Follow-up Queue

For Referring Agencies

September 2023

# Agenda

- Review of the CAPS new Follow Up Queue
  - Overview of dashboard and navigation panel
  - Overview of new Follow Up Queue screens
- Future Enhancements
- FAQs

# Referral Request- Follow-up Queue

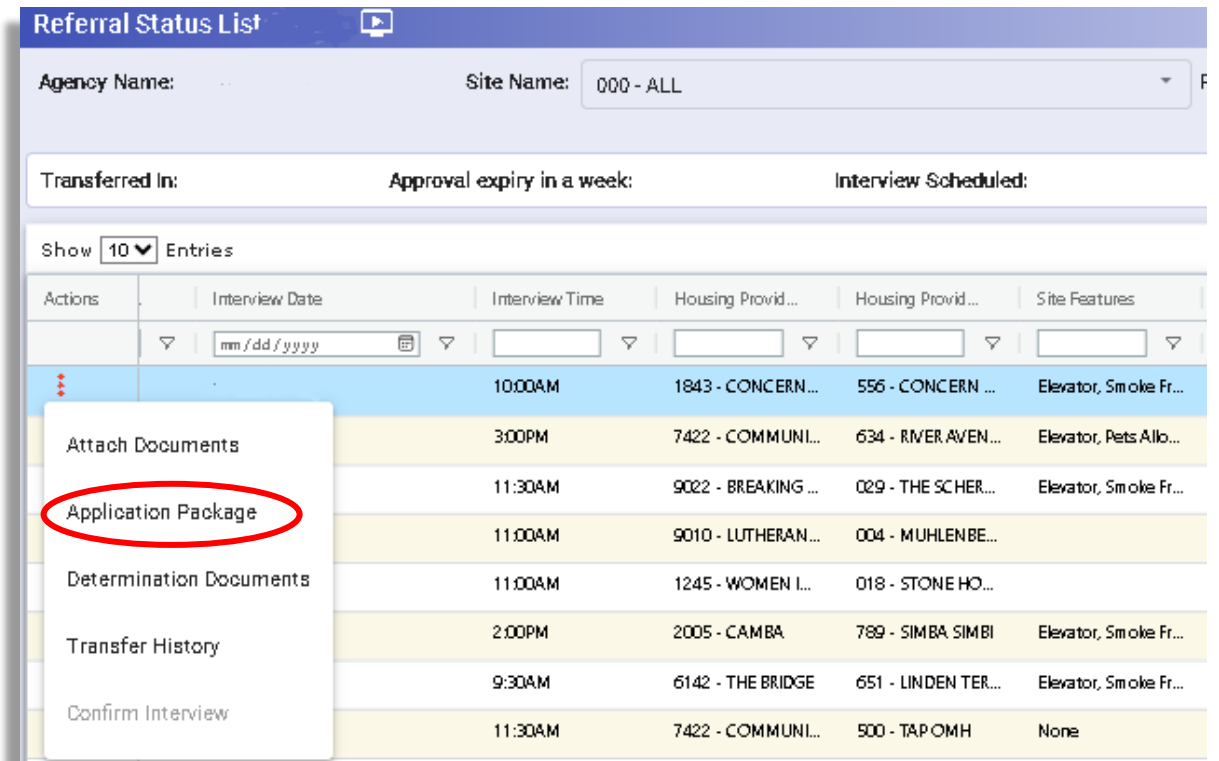
Effective **August 29, 2023**, the Coordinated Assessment Placement System (CAPS) will include new functionality to manage the placement process for clients referred by HRA's Office of Supportive/Affordable Housing Services (OSAHS) to rental supportive housing units.

The Referral Request- Follow-up Queue is accessible to supportive housing (HP) and Referring Agency (RA) providers (e.g. shelters, outpatient program, etc.) to update a client's referral status and upload post-placement documents. OSAHS' follow-up team will now facilitate the placement process through this queue. During this transition period HP and RA will continue to receive a follow-up team introduction by email. Starting, **October 31, 2023**, you will no longer receive an introduction email from the Placement Specialist through the SHAcceptedRental inbox. Thereafter, all communications will occur in the follow-up queue.

# Referral Status List

After a client has completed the housing interview, the HP is required to enter outcomes in CAPS within 48 hours. The results can be retrieved from the **Referral Status List**. The provider may include with the **Interview Outcome**, the document list and/or comments with the next steps. If document list was uploaded, it can be found in **The Post Approval** section of the **Application Package**.

Remember to discuss the **Interview Outcome** with the client to confirm their ongoing interest in the unit and to review the HP requested items.



The screenshot displays the 'Referral Status List' interface. At the top, there are filters for 'Agency Name' and 'Site Name' (set to '000 - ALL'). Below these are sections for 'Transferred In:', 'Approval expiry in a week:', and 'Interview Scheduled:'. A 'Show 10 Entries' dropdown is visible. The main table has columns for 'Actions', 'Interview Date', 'Interview Time', 'Housing Provid...', 'Housing Provid...', and 'Site Features'. A context menu is open over the first row, with 'Application Package' circled in red. Other menu items include 'Attach Documents', 'Determination Documents', 'Transfer History', and 'Confirm Interview'.

Actions	Interview Date	Interview Time	Housing Provid...	Housing Provid...	Site Features
⋮	mm/dd/yyyy	10:00AM	1843 - CONCERN...	556 - CONCERN ...	Elevator, Smoke Fr...
Attach Documents		3:00PM	7422 - COMMUNI...	634 - RIVER AVEN...	Elevator, Pets Alb...
Application Package		11:30AM	9022 - BREAKING ...	029 - THE SCHER...	Elevator, Smoke Fr...
Determination Documents		11:00AM	9010 - LUTHERAN...	004 - MUHLENBE...	
Transfer History		11:00AM	1245 - WOMEN L...	018 - STONE HO...	
Confirm Interview		2:00PM	2005 - CAMBA	789 - SIMBA SIMBI	Elevator, Smoke Fr...
		9:30AM	6142 - THE BRIDGE	651 - LINDEN TER...	Elevator, Smoke Fr...
		11:30AM	7422 - COMMUNI...	500 - TAP OMH	None

# Follow up Queue Introduction

After the interview outcome is updated to Accepted or Accepted/Pending Management Approval, it will appear in OSAHS' follow-up team's assignment queue. Upon assignment to a placement specialist, the client will appear in the HP and RA's follow-up queue. In the interim, staff will email the HP and the RA to initiate the follow-up process to provide guidance on the next steps.

The email will request the contact information for the individuals who will be responsible for facilitating the placement process for the client.

**Subj:** Supportive Housing Acceptance: [HP Agency Name / HP Program Name / Unit # / Client HRA ID / CARES ID]

**Body of the email:**

Good afternoon,

Client [NAME] has been accepted to the above referenced supportive housing project and has been referred to the Supportive Housing Follow Up Team. The Team is dedicated to assisting with the move in process to ensure a smooth and expeditious transition for client from shelter to supportive housing re-rental units. Moving forward all communication should be documented in the "Referral Activity" tab of the Follow Up Queue in CAPS. Please only use the [SHAcceptedRental@hra.nyc.gov](mailto:SHAcceptedRental@hra.nyc.gov) for issues that need to be escalated. All parties need to make sure that contacts who need to be in the loop on this case are included in the "Case Contacts" tab the Follow Up Queue. **These emails will no longer be sent after 10/31/23; CAPS will send autogenerated emails nightly to contacts included in the "Case Contacts" tab.**

\*\*\*\* NOTE\*\*\* Please Do Not Respond to or include Any Previous Email Threads.

**@HP:** Please verify that there is no rental subsidy and that client is linked to unit X. Any changes to this info must be updated in CAPS. List the documents needed to move forward with process.

**@RA:** Documents are a vital component to client securing housing. Currently client has the following documents uploaded in CAPS [X,X,X]. Upload any other documents indicated by the housing provider in the "Attach Documents" tab of the Follow Up Queue in CAPS.

Please note currently client Public Assistance case status is X

Thank you in advance for your time and assistance in working to move this client quickly into supportive housing.

For access to CAPS,

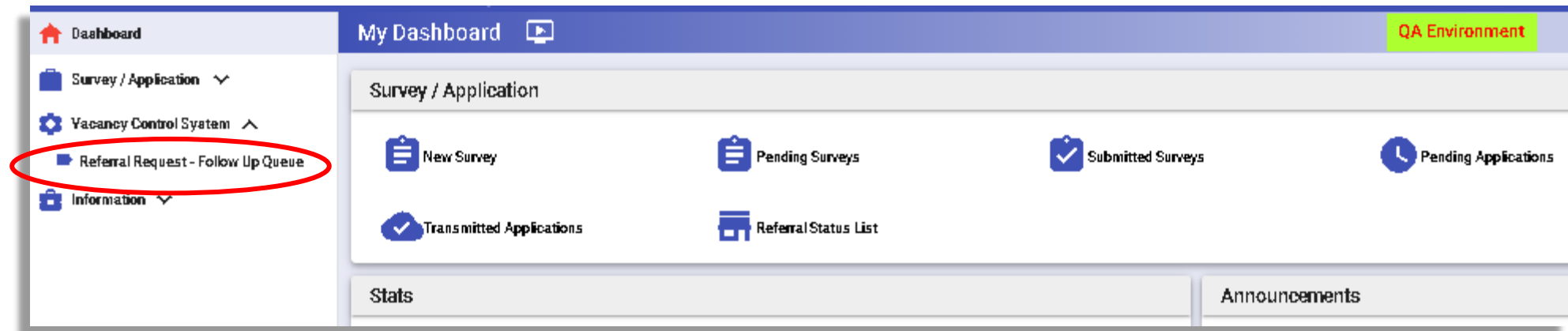
- Identify who is the CAPS system administrator for your program
- Ask that person to add you as a user for that program
- Complete the multifactor authentication (MFA) process
- If you have issues accessing CAPS, contact [hracassupport@hra.nyc.gov](mailto:hracassupport@hra.nyc.gov)

- Staff must have a CAPS ID to be added to the **Case Contact** list
- All staff assigned to that site in CAPS can access the queue
- If a staff member doesn't have access to CAPS, the site system administrator can create an ID

Instructions for creating a CAPS ID are available in the **Information** section of CAPS.

# CAPS Dashboard- Follow up Queue

The *referral request-follow-up queue* can be found in the CAPS navigation panel under *Vacancy Control System*.



# Follow-up Queue Home Screen

In the follow-up Queue Home screen, there are three tabs available as follows:

- ▶ **Follow-up Queue-** Contains all the active client cases in the placement process
- ▶ **Completed/Closed-** Contains all the client cases that have successfully moved into the unit
- ▶ **Discontinued Referrals-** Contains all the client cases that have been discontinued at the request of either the referring agency and/or supportive housing provider. For example, the client has declined to move forward with the unit

Dashboard

Vacancy Control System

Referral Request - Follow Up Queue

Referral Request - Follow Up Queue

Agency: 1006 - SAMARITAN VILLAGE Site: Select one

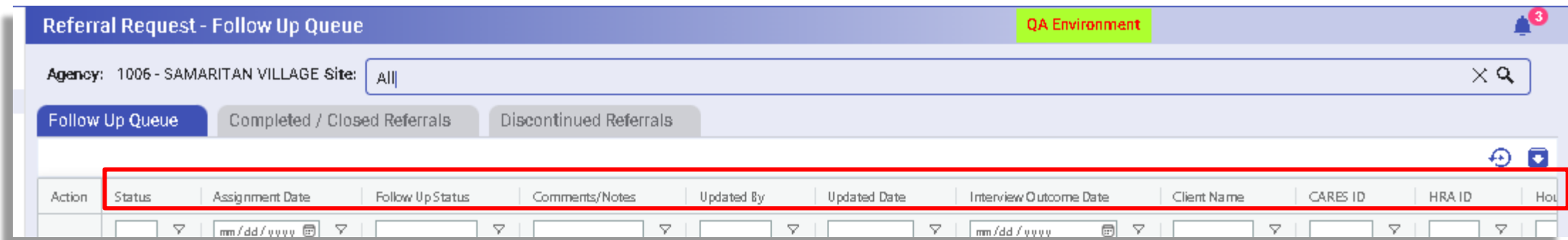
Follow Up Queue | Completed / Closed Referrals | Discontinued Referrals

Action	Status	Assignment Date	Follow Up Status	Comments/Notes	Updated By	Updated Date
		mm/dd/yyyy				

No records to show for follow up rel

# Follow-up Queue Home Screen

While the client case is active, most of the required tasks will be completed in the follow-up queue tab. The follow-up queue provides a wealth of information for the listed clients. The options to reposition columns, filter, etc. are the same as the grid functions across CAPS. Below are the explanations for the grid categories, excluding those that are self-explanatory:



Status: This is the interview outcome status and only cases with outcomes of “Accepted / Pending Move In” or “Pending Approval” will make it to the FUQ

Assignment Date: The date the client’s case was assigned to a follow-up team member

Follow-up status: This is the most recent Follow Up Status as entered in the “Referral Activity” tab in the FUQ

Comments/Notes: These are populated from the Follow Up Status in the “Referral Activity” tab in the FUQ

Interview outcome date: The date that the interview outcome was entered by into CAPS



# Follow-up Queue Home Screen

Referral Request - Follow Up Queue QA Environment

Agency: 1006 - SAMARITAN VILLAGE Site: All

Follow Up Queue | Completed / Closed Referrals | Discontinued Referrals

Action	Referral Requested Unit	Expected Unit Name	Primary Service Contract	Rental Subsidies	Contact For Interview	Email	Current Shelter Agency/Site
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Referral Requested Unit: This is the unit submitted from the Referral Request by the HP.

Expected Unit Name: Entered by HP in Interview Outcome screen. This can be changed and should be updated by HP, if necessary.

Current Shelter Type: CARES= client in DHS shelter, Unsheltered = client in outreach, drop-in, stabilization bed program

# Follow-up Queue Home Screen

Referral Request - Follow Up Queue QA Environment 3

Agency: 1006 - SAMARITAN VILLAGE Site: All X Q

Follow Up Queue Completed / Closed Referrals Discontinued Referrals

Action	Expected Move In Date	Outcome Comments	Outcome Updated By/Date	Interview Outcome	Placement Outcome	Reason	Comments
	mm/dd/yyyy						

Expected Move In Date: This comes from the Interview Outcome screen and is entered by the HP. It can be updated and should be kept current.

Outcome Comments: From Interview Outcome screen entered by HP., which can be updated.

Reason: From the Interview Outcome screen entered by HP, which can be updated.

Comments: From Interview Outcome screen entered by HP, can be updated.

# Follow-up Queue Client Screen

To update the follow-up status and/or attach placement related documents, navigate to the **Follow-up Queue** in the action menu for the selected client.

The **Follow-up Queue** will open to the page below. The client header will be displayed, including the client's name, shelter, unit referred to and the HP information.

Follow Up Queue

QA Environment

Client Name: Client Shelter: Housing Provider Agency:

Primary Service Contract: Unit Referred To: Housing Provider Site:

Attach Document Case Contacts View Application Package Referral Activity

Attach Documents

\*\* System will accept only PDF documents, please make sure the documents uploaded are in PDF format

Document Type: Select One

File to Attach: Browse File

Document Description: +

Referral Request - Follow Up Queue

Agency: Site: All

Follow Up Queue Completed / Closed Referrals Discontinued Referrals

Action	Housing Agency Name	Housing Agency Site	Site Address
	1245 - WOMEN IN NEED, I...	018 - STONE HOUSE - N...	91 JUNIUS STREET, BROOKLY
	RAN SOCIAL S...	004 - MUHLENBERG RESI...	510 ATLANTIC AVENUE, BRO
		778 - HILL HOUSE	1616 GRAND AVE, BRONX, N

There are four tabs available:

- **Attach Document**
- **Case Contacts**
- **Application Package**
- **Referral Activity**

# Follow-up Queue- Attach Document

The **Attach Document** tab is the first page that you will land on in the **Follow up Queue Client Screen** for the selected client. You can attach placement documents in this section, which will become instantaneously viewable to HRA, the RA team, and the HP staff. Select the correct category from the **Document Type** menu list (e.g., Income, Identification, etc.), this will help all teams working to place the client easily identify uploaded items. Remember to provide a description and a file name that relates to the document being uploaded.

Follow Up Queue QA Environment NYC 15/

Client Name: Client Shelter: Housing Provider Agency:  
Primary Service Contract: Unit Referred To: Housing Provider Site:

**Attach Document** Case Contacts View Application Package Referral Activity

**Attach Documents**

\*\* System will accept only PDF documents, please make sure the documents uploaded are in PDF format

Document Type: Select One

File to Attach: Income

Document Description: Identification

Citizenship

Rental Assistance Application

Actions	Type
	Placement Doc
	Application Sum r
	Other Docs

ADDENDUM doc addendum 08/22/2023 - 06:09 PM

Note that copies of One Shot Deal Checks will be uploaded here

All documents must be in **PDF**

# Follow-up Queue- Contacts

The first person that appears in the **Case Contacts** is the assigned placement specialist from OSAHS' follow-up team( agency name will appear as Department of Homeless Services). You can search the list of CAPS users from your agency's site to add contacts to the case. If the individual(s) doesn't appear in the menu, the system administrator can review the **User Security** module to see if the staff person(s) is associated with the program site. If a contact is added in error or if the contact person(s) change, you can delete the staff entry using the action menu.

The screenshot shows the 'Follow Up Queue' interface. At the top, there's a blue header with 'Follow Up Queue' and a green 'QA Environment' badge. Below the header, there are fields for 'Client Name', 'Client Shelter', 'Housing Provider Agency', 'Primary Service Contract', 'Unit Referred To', and 'Housing Provider Site'. A red circle highlights the 'Case Contacts' tab. Below the tabs, there's a search form with 'Agency: 6728 - POST GRAD CTR Site: 032 - ECHO PLACE - NY/NY III POP A CITY' and a 'Contact Person:' search box. A note reads: 'NOTE: Please contact your Sys Admin if you would like to update the email/phone #'. Below the note, there are fields for 'First Name', 'Last Name', 'Email Address', 'User Role: MANAGER', 'Phone Number', and 'Extension'. A green plus sign is next to the 'Email Address' field. At the bottom, there's a table with columns: Action, First Name, Last Name, Agency No/Name, Site No/Name, Type of Contact, Email Address, Phone Number, and Ext. The table has one row with data: MARIA-ANDREINA, 2001 - DEPARTMENT OF ..., 999 - SINGLE SHELTER PL..., Supportive Housing Place..., ga...

Action	First Name	Last Name	Agency No/Name	Site No/Name	Type of Contact	Email Address	Phone Number	Ext
	MARIA-ANDREINA		2001 - DEPARTMENT OF ...	999 - SINGLE SHELTER PL...	Supportive Housing Place...	ga...		

Search for the staff name

To add the selected staff, click the plus sign

# Follow-up Queue- Application Package

The **Application Package** tab allows you to view the application on file for the client. Please review the **HRA Document Viewer** tab in the application package to see if the requested documents are already available. The HRA Viewer documents section allows you to access select identifying and financial documents on file for a client through HRA's document repository. Additionally, you should also review the application package, as placement related documents are sometimes included with the package. The HP and OSAHS will also be reviewing these sections to identify available client documents.

QA Environment

### Application Package

Housing Application and Supporting Documents

Agency/Site : Client Name : HRA Client # :  
Approval Expiry Date : Application # :

Application Package

Determination Documents

Post Approval Documents

HRA Viewer Documents

Document Description	CIN	CASE #	Entry Date
<a href="#">Pay Stubs</a>			03/02/2023
<a href="#">Bank Account Statement</a>			03/02/2023
<a href="#">Current Bank Records</a>			02/23/2023
<a href="#">Birth Certificate Bureau of Vital Statistics</a>			05/30/2022
<a href="#">Social Security Card</a>			05/30/2022

# Follow-up Queue- Referral Activity

The **Referral Activity** tab is how you will primarily communicate with the HP team and OSAHS. Updates entered in this tab are viewable by all parties.

## Current Responsible Party for the Case:

- **Pending at Placement Entity:** The agency that is responsible for providing referral for the vacancy. For this queue, the entity is HRA. Action is required by HRA to proceed with placement.
- **Pending at Housing Provider:** Action required by the HP to proceed with placement.
- **Pending at Referring Agency:** The agency that referred the client for supportive housing application. Typically, the shelter. Action is required by the shelter or RA to proceed with placement.

The screenshot displays the 'Follow Up Queue' interface. At the top, there is a header bar with 'Follow Up Queue' on the left, 'QA Environment' in a yellow box in the center, and 'NYC 15/15 Research Consents' on the right with a notification icon. Below the header, there are several input fields: 'Client Name:', 'Client Shelter:', 'Housing Provider Agency:', 'Primary Service Contract:', 'Unit Referred To:', and 'Housing Provider Site:'. A navigation bar contains 'Attach Document', 'Case Contacts', and 'View All'. The main form area has a red box around the 'Current Responsible Party for Case:' label. A dropdown menu is open, showing three options: 'Pending at Placement Entity', 'Pending at Housing Provider', and 'Pending at Referring Agency'. Below the dropdown is a 'Comments:' field with a character count '(Maximum entry of 1500 characters; 1500 characters remaining)'. At the bottom right of the form are 'Save' and 'Exit' buttons. At the very bottom, there is a table with columns: 'Date Submitted', 'Current Responsible Party', 'Follow Up Status', 'Agency/Site', 'Action Updated By', 'Type of Contact', and 'Comments'. Each column has a dropdown arrow.

# Follow-up Queue- Referral Activity

To update the status of a client's case in follow-up, you must determine who is the responsible party for the next action. Depending on the party selected, the drop-down values will change in the **Follow up Status Menu**. As the RA, the parties that will typically be selected are **Pending at Referring Agency** or **Pending at Housing Provider**. OSAHS' role is to facilitate the placement process, troubleshoot where appropriate and support a timely move out of the client.

The follow-up queue referral activity process:

- The first activity status seen in the queue will be from the placement specialist
- The placement specialist upon receipt of the assignment will review the information entered from the **Interview Outcome** and various administrative systems to provide instructions on the next step in the placement process
- The responsible party will receive a deadline by which to complete the assigned task, typically, within 3 days (e.g. Pending at Referring Agency , status: Gathering documents, please upload ID by 9/14/23)
- It is critical that staff log into the system regularly to check the follow-up status and provide updates to all parties



# Follow-up Queue- Referral Activity

Once you've reviewed the previously entered status, comments and documents attached (if applicable), enter a new follow-up status as follows:

1. Select the **Current Responsible Party for the Case** from the drop-down menu
2. Select the **Follow-up Status Reason**
3. Enter a detailed comment about what is required or what has been completed or other specific details related to the status selected

4. Click **Save** when done

The screenshot shows a web application interface for 'Referral Activity'. It features a navigation bar with tabs: 'Attach Document', 'Case Contacts', 'View Application Package', and 'Referral Activity'. The main form area includes:

- 'Current Responsible Party for Case:' with a dropdown menu showing 'Select One'.
- 'Follow Up Status:' with a dropdown menu showing 'Select One'.
- 'Comments:' with a text area and a note: '(Maximum entry of 1500 characters; 1500 characters remaining)'.
- A 'Save' button at the bottom right.

Below the form is a table with the following columns: Date Submitted, Current Responsible Party, Follow Up Status, Agency/Site, Action Updated By, Type of Contact, and Comments.

Date Submitted	Current Responsible Party	Follow Up Status	Agency/Site	Action Updated By	Type of Contact	Comments
2023-09-07	Pending at Housing Provider	Pending Management Approval	7320- SUS/024- BLAKE SHELTE...		Supportive Housing Referring A...	All documents uploaded.
2023-09-07	Pending at Referring Agency	Gathering Documents	2001 - DEPARTMENT OF HOME...		Supportive Housing Placement ...	Please upload ID by 9/08

# Follow-up Queue- Referral Activity Status

Follow-up Status	Definition
<b>Pending at Placement Entity</b>	
OSD Checks Ready for Pick up	Checks are available for pick up at HRA
Other	Otherwise not listed
<b>Pending at Housing Provider</b>	
Documents Needed	The HP's list of documents required by funding source and/or a specific document that needs to be supplied by HP
Pending Management Approval	Client's submitted documentation is under review by the housing provider's property management team
Pending HDC Or 3 <sup>rd</sup> Party Compliance	Pending review by HDC or 3 <sup>rd</sup> party compliance
Pending Apartment Viewing	The client is accepted and is awaiting a scheduled appointment to view the available unit
Pending Acceptance Letter	A letter of acceptance drafted by HP including housing address, rent, tentative move-in date, etc. This letter is provided post property management approval (HPD/NYCHA approval, if receiving rental subsidy)
Pending HQS (Housing Quality Standards)	Pending the scheduling and/or upcoming date for unit inspection by NYCHA or HPD
Pending HPD (Housing Preservation and Development)/NYCHA Briefing	A required appointment with NYCHA/HPD if the unit and/or client receive a rental subsidy administered by these agencies. This appointment is scheduled after the approval of the application
Pending Move-in Date	The client has received property management approval and is awaiting a move-in date. This can be pre or post receipt of first month's rent /security.
Pending Lease Signing	HP awaiting signature of the lease
Other	Otherwise not listed

# Follow-up Queue- Referral Activity Status

Follow-up Status	Definition
<b>Pending at Referring Agency</b>	
Applied for PA	The client has applied for public assistance
OSD Submitted	The request and application for one shot deal was submitted
<b>Gathering documents</b>	The referring agency and client are working to gather required documents
Other	Otherwise not listed

# Follow-up Queue- Referral Activity Tips

The following are tips to consider as you update the referral activity for a client:

- Check the referral status activity daily to ensure you remain abreast of updates
- Check the attach document section for uploaded documents. The most recently uploaded item should appear at the top of the documents list. If unsure, check the attached date/time
- If the client didn't previously view the apartment and would like to schedule a viewing, request this by selecting ***Pending at Housing Provider*** and ***Pending Apartment Viewing***. In the comments section you can note the client's availability. This should be completed earlier in the placement process to avoid delays
- When possible, escort the client to their housing appointments. The housing provider is expected to conduct **only one** interview prior to an offer of acceptance (except in rare circumstances). All subsequent appointments should be for the completion of management applications and/or document gathering or apartment viewing purposes. If there are concerns regarding the nature of the appointment, please alert your supervisor as well as the assigned placement specialist
- If the client is requested to complete documents, review the package with the household. If the client doesn't have the documents requested, you may substitute based on the following chart: [HPD & HDC Rental subsidy & Tax Code documents chart.xlsx \(nyc.gov\)](#)
- For clients that do not have SSI/SSDI, ensure that their public assistance case remains active for the duration of the housing process. Applications for public assistance will take at least 45 days to be processed. This should be initiated as soon as possible. If it becomes inactive, immediately work with the client to resolve
- For clients with SSI/SSDI, please apply for the One Shot Deal when close to receiving an acceptance letter., so that the client is reviewed for a single issuance case. As these cases do not remain open in the same manner as active PA case

# Follow-up Queue- Discontinue Referral Activity

If a client referral needs to be discontinued, you must submit a request to HRA. The HP is unable to discontinue the referral without approval from HRA to unlock the **Interview Outcome**. For the RA, this request would typically apply if the client is declining the unit. For the HP, this request would apply if the client is determined to be ineligible after property management review or for other reasons. Prior to submitting a request to HRA, it is advised that you review with the client the reasons that they may be declining the unit. This will give the client an opportunity to discuss their concerns and to receive additional information. Clients can learn more about supportive housing here: [Supportive Housing Client Brochure](#). Please note that the HP must adhere to the [Placement Policy Guidance for NYC Supportive Housing](#) and comply with the City's guidelines.

Below are not permissible reasons to discontinue a referral:

- Prospective tenant does not acknowledge their mental illness
- Prospective tenant is not truthful during interview about mental health or substance use
- Prospective tenant uses substances
- Prospective tenant does not currently take prescribed medications
- A reason related to a protected class under Fair Housing Law
- Prospective tenant doesn't want services

# Follow-up Queue- Discontinue Referral Activity

To request a discontinuation of a referral, complete the following steps:

1. Select **Pending at Placement Entity**
  2. Select “other” as the **Follow-up Status Reason**
  3. Provide a detailed comment describing the reason for the request to discontinue the referral
  4. Click **Save**
- HRA will review the request and update the status accordingly

The screenshot shows a web application interface with a navigation bar at the top containing tabs: 'Attach Document', 'Case Contacts', 'View Application Package', and 'Referral Activity'. The 'Referral Activity' tab is active. Below the navigation bar, there are three dropdown menus: 'Current Responsible Party for Case:' set to 'Pending at Placement Entity', 'Follow Up Status:' set to 'Other', and 'Comments:' containing the text 'Requesting to discontinue referral because the client declined the unit. The client plans to move to another unit in the community.' Below the comments field, there is a note: '(Maximum entry of 1500 characters; 1368 characters remaining)'. At the bottom of the form, there is a table with columns: 'Date Submitted', 'Current Responsible Party', 'Follow Up Status', 'Agency/Site', and 'Action Updated By'. The table contains one row of data: '2023-09-01', 'Pending at Housing Provider', 'Pending HPD (Housing Preserva...', '2001 - DEPARTMENT OF HOME...', and '..'.

Date Submitted	Current Responsible Party	Follow Up Status	Agency/Site	Action Updated By
2023-09-01	Pending at Housing Provider	Pending HPD (Housing Preserva...	2001 - DEPARTMENT OF HOME...	..

# Follow-up Queue- Discontinue Referral Activity

## Discontinue Referral Activity Denied

Upon review of the request, HRA will unlock the ability to update the interview outcome, where appropriate. For the RA, typically a request is made due to a change in the client's decision or circumstances. HRA may request additional information to clarify the reasons for request. For requests from the HP, HRA may consult the HP's contracting agency to discuss the request for discontinuation, if the reasons identified are not permitted. If the request is denied, the HP will not be able to update the interview outcome or request a new referral for the unit in CAPS. The client will remain in the follow-up queue. You can request to speak with a supervisor for further assistance.

## Discontinue Referral Activity Approved

If the request is approved, the ***Interview Outcome*** will be unlocked. The HP will update the Interview outcome to either the ***Client Did Not Accept Housing*** or the ***Housing Provider Did No Accept Client***. The case record will move from the ***Follow up Queue*** to the ***Discontinued Referral*** tab. The updated outcome is also viewable in the ***Referral Status List***. Depending on the reason for the request the client may be placed on a temporary referral hold (e.g. The client has accepted another housing opportunity in the community).

# Follow-up Queue- Discontinue Referral Activity

Approved discontinued referrals will appear in the **Discontinued Referrals** tab of the **Referral Request Follow up Queue**. You can view the follow-up details in **View Follow up Details**. The change in status will not automatically update the **Interview Outcome**.

The screenshot displays the 'Referral Request - Follow Up Queue' interface. At the top, it shows the Agency: 9016 - VOA Site: 039 - E.119 Street SRO. Below this, there are three tabs: 'Follow Up Queue', 'Completed / Closed Referrals', and 'Discontinued Referrals'. The 'Discontinued Referrals' tab is highlighted with a red circle. Below the tabs is a table with columns: Action, Status, Discontinued Date, Discontinued By, and Discontinued Reason. The table contains one row with the following data: Action (indicated by a red vertical bar), Status: Accepted/Pending Move In, Discontinued Date: 09/07/2023, Discontinued By (empty), and Discontinued Reason: Client Linked to Other Housing. Below the table, there is a button labeled 'View Follow Up Details' with a document icon, which is also circled in red.

Action	Status	Discontinued Date	Discontinued By	Discontinued Reason
	Accepted/Pending Move In	09/07/2023		Client Linked to Other Housing

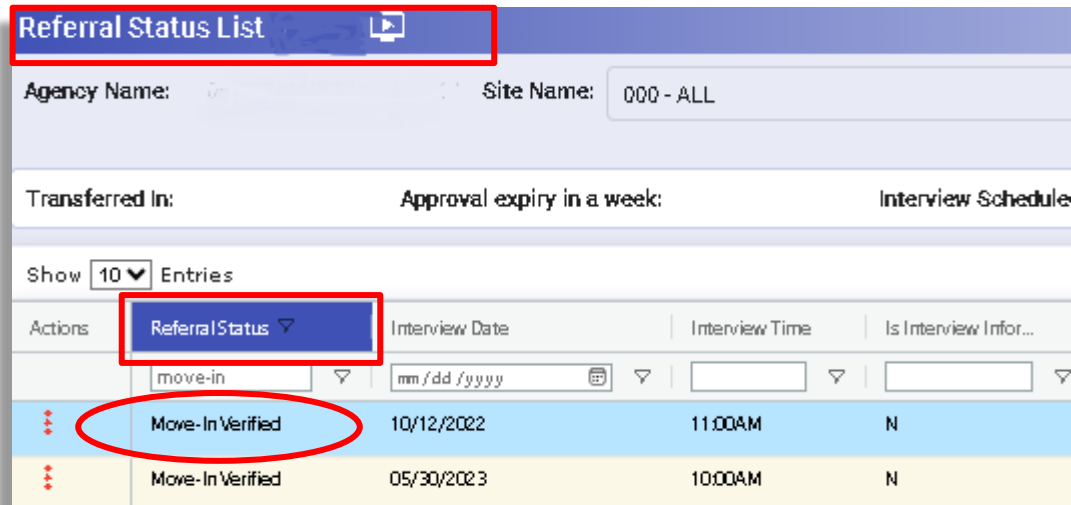


# Follow up Queue Completed/Closed Referrals

A referral will move to the **Completed/Closed** tab of the **Referral Request- Follow up Queue** once the HP updates the **Interview Outcome** to **Move-in**. The HP doesn't have to request that HRA unlock the **Interview Outcome** to proceed. Once a client moves in, the **Interview Outcome** must be updated by the HP within 48 hours to ensure that the referral is moved out of the follow-up queue.

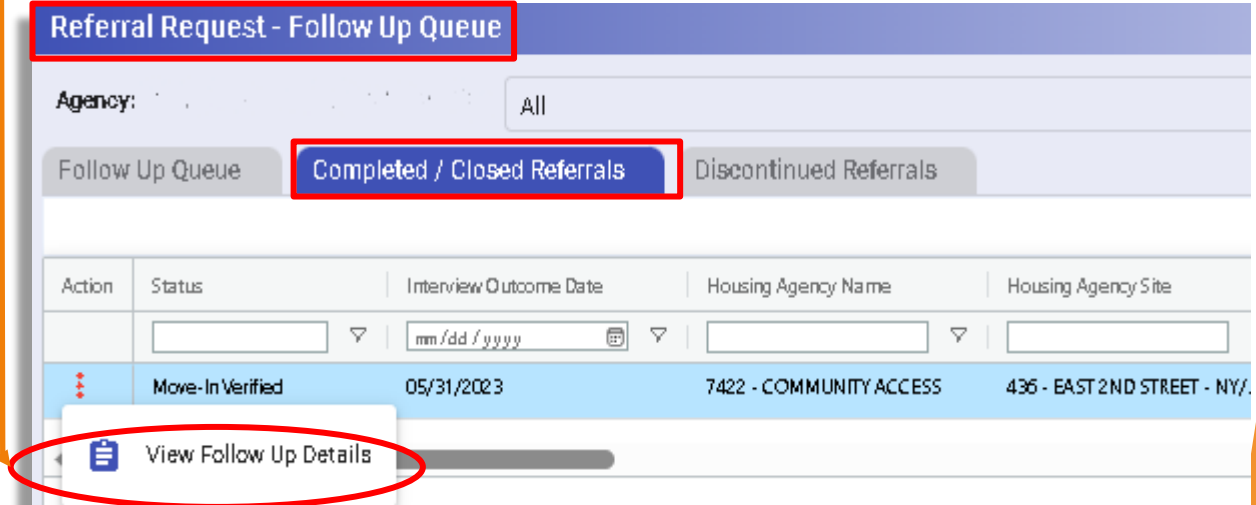
Additionally, the client referral will be updated in the **Referral Status List** in the **Referral Status Column** as **Move-in Verified**.

To view the prior Follow up Activity, select **View Follow up Details** from the action menu



The screenshot shows the 'Referral Status List' interface. At the top, there are filters for 'Agency Name' and 'Site Name: 000 - ALL'. Below these are fields for 'Transferred In:', 'Approval expiry in a week:', and 'Interview Schedule'. A 'Show 10 Entries' dropdown is visible. The main table has columns for 'Actions', 'Referral Status', 'Interview Date', 'Interview Time', and 'Is Interview Infor...'. The 'Referral Status' column is highlighted with a red box. The first two rows of the table are highlighted with red circles: the first row shows 'Move-In Verified' with an interview date of 10/12/2022 and time of 11:00AM, and the second row shows 'Move-In Verified' with an interview date of 05/30/2023 and time of 10:00AM.

Actions	Referral Status	Interview Date	Interview Time	Is Interview Infor...
	Move-In Verified	10/12/2022	11:00AM	N
	Move-In Verified	05/30/2023	10:00AM	N



The screenshot shows the 'Referral Request - Follow Up Queue' interface. At the top, there are filters for 'Agency:' and 'All'. Below these are tabs for 'Follow Up Queue', 'Completed / Closed Referrals', and 'Discontinued Referrals'. The 'Completed / Closed Referrals' tab is highlighted with a red box. The main table has columns for 'Action', 'Status', 'Interview Outcome Date', 'Housing Agency Name', and 'Housing Agency Site'. The 'Action' column is highlighted with a red box, and the 'View Follow Up Details' option is circled in red. The first row of the table shows 'Move-In Verified' with an interview outcome date of 05/31/2023, housing agency name of 7422 - COMMUNITY ACCESS, and housing agency site of 436 - EAST 2ND STREET - NY/.

Action	Status	Interview Outcome Date	Housing Agency Name	Housing Agency Site
View Follow Up Details	Move-In Verified	05/31/2023	7422 - COMMUNITY ACCESS	436 - EAST 2ND STREET - NY/

# Shelter Exit Codes (DHS Use Only)

When a client exits shelter into permanent supportive housing, CARES must be updated with the correct exit code. It is critical that these codes accurately reflect the setting where the client was placed. The codes are based on the supportive housing category or type. If unsure of which code to enter look at the tables below.

CARES Exit Codes		
Exit Category	Exit Reason	Exit Reason CD
Subsidized	General Population Supportive Housing	CER019
Subsidized	NYNY Supportive Housing-Congregate	CER037
Subsidized	NYNY Supportive Housing - Scattered-site	CER054
Subsidized	NYC 15/15 Congregate	CER147
Subsidized	NYC 15/15 Scattered Site	CER148
Subsidized	ESSHI (Empire State Supportive Housing Initiative)	CER171

Match the **Primary Service Contract** to the CARES exit code in the table.

Referral Request - Follow Up Queue

Agency: All Site: All

Staff Assignment Follow Up Queue **Completed / Closed Referrals** Discontinued Referrals

Action	Housing Agency Site	CARES ID ↑	HRA ID	Primary Service Contract
***	002 - TIMES SQUARE HOTEL			NY/NY I & II
***	002 - TIMES SQUARE HOTEL			NY/NY I & II
***	003 - CASA RENACER - NY/NY II			NY/NY I & II
***	005 - THE KENMORE			General Population

# Future Enhancements

Tentatively, scheduled for **late September/Early October** release, case contacts listed in the follow up Queue will receive the following email notifications for these status changes:

- When a client has been assigned to follow up
- Reminder email to the responsible party 5 days after a status update has been entered in the follow up queue
- Once the Interview outcome has been updated to moved-in and the referral has moved to the ***Completed Tab*** of the follow-up queue
- Once a referral has been discontinued and moved to the ***Discontinued Referral*** tab

# FAQs

**Can I still communicate with the Follow up team through the SHAcceptedRerental inbox?**

Yes, you can still communicate with your assigned placement specialist and/or supervisor. However, all referral updates must be entered in the follow up queue. The inbox should be used to ask questions and/or receive assistance.

**The client referral was discontinued, will HRA automatically send new referrals?**

Your client will be referred once a housing opportunity becomes available, based on prioritization and eligibility.

**I would like to speak to a supervisor, who should I contact?**

You may contact Kimberly Butler at [butlerki@hra.nyc.gov](mailto:butlerki@hra.nyc.gov), Program Manager, who oversees the follow up team or Alathia Barnett at [barnettal@hra.nyc.gov](mailto:barnettal@hra.nyc.gov), Executive Director of Supportive Housing Rerentals.

**I am experiencing technical difficulties with CAPS, who should I contact?**

You can contact [hracassupport@hra.nyc.gov](mailto:hracassupport@hra.nyc.gov) to assist with technical issues.