



CAPS User Security Manual

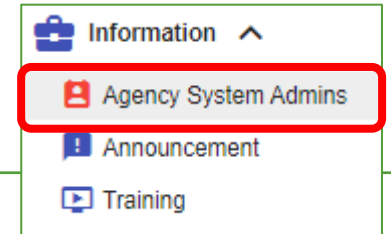




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CAPS URL: <https://a069-ra.nyc.gov/pact>



Important:

- **New Users:** Ask the System Administrator in your agency to add you as a new user. If you do not know who your agency’s System Administrator is, ask any CAPS user at your agency to click the Information icon in the Dashboard menu, and select “Agency System Admins,” or if you do not know any CAPS users at your agency, email: HRACASSUPPORT@hra.nyc.gov



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User Security

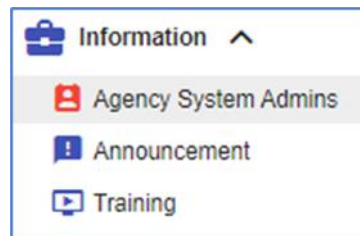
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User Security

- Users are created by **CAPS System Administrator at each agency**, or by HRA CAS Support
 - If there are no active CAPS System Administrators at the agency, HRA CAS Support Admin will create user(s).
 - If CAPS System Administrator's account was deactivated, HRA CAS Support Admin will reactivate CAPS System Administrator's account, and send notification for MFA invitation.
 - If CAPS System Administrator at the agency does not have access, HRA CAS Support Admin will create new CAPS users.
 - If CAPS user has access, but is looking for an Active System Administrator at their agency, they can use the **Agency System Admins lookup** in the left menu under **Information**





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User Security

- If a new CAPS account is created by CAPS System Administrator, they should **notify HRA CAS Support about the new user**. HRA CAS Support will monitor the timeline and work with the MFA team to ensure that the MFA invitation is sent to the new user.
- If an active user with the same First Name and Last Name exists at the same agency or *any other agency*, CAPS will display an error message.
 - Please contact HRA CAS Support to transfer the user account in CAPS
 - **Note: Estimated wait time for the MFA invitation email is 1-2 weeks**
- Users are no longer required to use CAPS Password to sign-in.
 - **When using MFA, users should sign-in with their business/agency email address as a username, and password used for this email address**

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User Security – Adding a New User

- Go to CAPS > System Administration > **User Security**.
 - This will open the **User Administration** page, where you can **add** or **edit** CAPS users for your agency.
 - The default view is of all users for the entire agency, both active and inactive.
 - To see staff of a particular site, select the Site Type and Site Name from the drop-down menus.

The screenshot illustrates the navigation path from the CAPS System Administration menu to the User Administration page. The left sidebar shows the following menu items:

- Dashboard
- Survey / Application
- Vacancy Control System
- System Administration** (highlighted with a red box)
 - Agency/Site Profile
 - User Security** (highlighted with a red box)

A red arrow points from the 'User Security' menu item to the 'User Administration' page. The 'User Administration' page header is also highlighted with a red box. The page displays the following information:

User Administration (QA Environment)

Add New User

Display Users based on selection:

Agency Name: [] Site Type: Select One Site Name: Select one [GO]

Agency: 2005 - CAMBA

Action	Name (L...)	HRA LA...	DHS Do...	Email	Level	Access	Site - Su...	User Stat...	Office Ph...	Last Log In	Juniper
⋮	[]	[]	[]	[]	SYS ADMIN	CARES	[]	I	[]	07/16/2019	Yes
⋮	[]	[]	[]	[]	SUPERVISOR	Transmit	[]	A	[]	04/11/2022	Yes
⋮	[]	[]	[]	[]	SUPERVISOR	Transmit	[]	I	[]	10/07/2020	Yes
⋮	[]	[]	[]	[]	SYS ADMIN	CARES	[]	I	[]	04/26/2018	Yes
⋮	[]	[]	[]	[]	MANAGER	Transmit	[]	I	[]	01/07/2022	Yes
⋮	[]	[]	[]	[]	STAFF	Transmit	[]	I	[]	06/27/2019	Yes
⋮	[]	[]	[]	[]	MANAGER	Transmit	[]	I	[]	08/24/2007	Yes
⋮	[]	[]	[]	[]	STAFF	Transmit	[]	I	[]	07/03/2018	Yes
⋮	[]	[]	[]	[]	STAFF	CARES	[]	I	[]	08/11/2021	Yes
⋮	[]	[]	[]	[]	SYS ADMIN	Transmit	[]	I	[]	06/25/2010	Yes

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User Security – Adding a New User

2. Add a new user by clicking the **Add New User button** (at top of the User Administration page).
 - This will open a blank User form to fill out.
 - Complete **required fields in red**.

User Administration QA Environment

Add New User

Display Users based on selection:

Agency Name: Site Type: Site Name:

Agency: 2005 - CAMBA

Action	Name (L... ≡)	HRA LA...	DHS Do...	Email	Level	Access	Site - Su...	User Stat...	Office Ph...	Last Log In	Juniper
⋮	[Redacted]				SYS ADMIN	CARES Transmit Liason		I	[Redacted]	07/16/2019	Yes
⋮	[Redacted]				SUPERVISOR	Transmit		A	[Redacted]	04/11/2022	Yes
⋮	[Redacted]				SUPERVISOR	Transmit		I	[Redacted]	10/07/2020	Yes
⋮	[Redacted]				SYS ADMIN	CARES Transmit		I	[Redacted]	04/26/2018	Yes
⋮	[Redacted]				MANAGER	Transmit Liason		I	[Redacted]	01/07/2022	Yes
⋮	[Redacted]				STAFF	Transmit Liason		I	[Redacted]	06/27/2019	Yes
⋮	[Redacted]				MANAGER	Transmit		I	[Redacted]	08/24/2007	Yes
⋮	[Redacted]				STAFF	Transmit		I	[Redacted]	07/03/2018	Yes
⋮	[Redacted]				STAFF	CARES Transmit	[Redacted]	I	[Redacted]	08/11/2021	Yes
⋮	[Redacted]				SYS ADMIN	Transmit		I	[Redacted]	06/25/2010	Yes

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User Administration QA Environment

User

Agency Name:

Is the user DSS/HRA staff? Yes No

First Name: Last Name:

Access Level:

Email:

Office Phone: Extension:

Cell Phone: Fax Phone:

Comment:

User Status: Active Inactive

Assign Sites

- 001 - [Redacted] (SH-RA)
- 002 - [Redacted] (SH-RA)
- 003 - [Redacted] (SH-RA)
- 004 - [Redacted] (SH-RA)
- 006 - [Redacted] (SH-HP)
- 007 - [Redacted] (SH-RA)

Sites Assigned

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User Security – Adding a New User

3. **Assign the user to the appropriate site(s)** by checking the box next to a **site name** listed in the Sites List Box on the left.

- This will move the site into the box on the right, which are the sites assigned to the user.
- To deselect a site, simply deselect the box in front of the site on the right.

The screenshot shows the 'User Administration' interface. The 'Assign Sites' section is highlighted with a red box. It contains a list of sites with checkboxes and site names:

Site ID	Site Name	Code
<input type="checkbox"/>	001 - [redacted]	(SH-RA)
<input type="checkbox"/>	002 - [redacted]	(SH-RA)
<input type="checkbox"/>	003 - [redacted]	(SH-RA)
<input type="checkbox"/>	004 - [redacted]	(SH-RA)
<input type="checkbox"/>	006 - [redacted]	(SH-HP)
<input type="checkbox"/>	007 - [redacted]	(SH-RA)

The screenshot shows the 'Sites Assigned' section, which is highlighted with a red box. It contains a list of sites with checkboxes and site names:

Site ID	Site Name	Code
<input checked="" type="checkbox"/>	006 - [redacted]	(SH-HP)

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User Security – Adding a New User

4. After assigning the sites, **Referring Agencies** will have the option to give the new user “Permission to Transmit Application Data to HRA.”
5. After assigning the sites, **Housing Providers** will have the option to give the new user “Housing Liaison” permission.
 - If the user will be **transmitting TADS**, select **Yes** next to Housing Liaison.

The screenshot shows a user configuration form with several sections. A red box highlights the 'Permission to Transmit Application Data to HRA' and 'Housing Liaison' radio button options, with a red arrow pointing to the 'Yes' option for 'Housing Liaison'. Another red box highlights the 'Sites Assigned' list, which contains one entry: '006 - [redacted]' with a checked checkbox. The 'Assign Sites' list on the left contains three entries: '001 - [redacted] (SH-RA)', '002 - [redacted] (SH-RA)', and '003 - [redacted] (SH-RA)', all with unchecked checkboxes. The 'User Status' section shows 'Active' selected.

Permission to Transmit Application Data to HRA: Yes No
Housing Liaison: Yes No

User Status: Active Inactive

Assign Sites

- 001 - [redacted] (SH-RA)
- 002 - [redacted] (SH-RA)
- 003 - [redacted] (SH-RA)

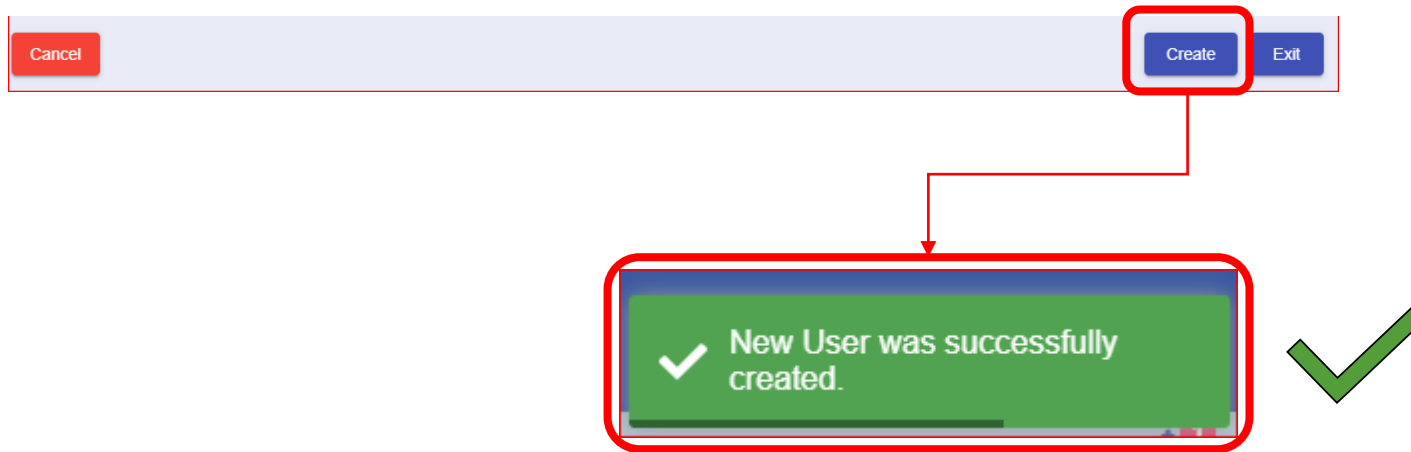
Sites Assigned

- 006 - [redacted]

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User Security – Adding a New User

- At the bottom of the new user form, click **Create** to save the new user to your agency.



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User Security – Managing User Roles

There are **4 levels of access** that you can assign to CAPS users: Staff, Supervisor, Manager, or Sys Admin.

The screenshot shows a form with the following fields: Access Level (dropdown), Email, Office Phone, Cell Phone, and Comment. The dropdown menu is open, showing the following options: Select One, STAFF, SUPERVISOR, MANAGER, and SYS_ADMIN. A red box highlights the 'Access Level' field and the dropdown menu.

CAPS User Roles				
	Survey	Application	TADs (Housing Providers Only)	User Security
Staff	View and submit own	View and submit own	View and submit own	N/A
Supervisor	View and submit for self and staff	View, submit and delete for self and staff	View and submit for self and staff	N/A
Manager	View and submit for self and staff	View, submit and delete for self and staff	View and submit for self and staff	N/A
Sys Admin	View and submit all	View, submit and delete all	View and submit all	Add and update users



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User Security – Managing User Roles

- A System Administrator (Sys Admin) is designated by their agency to manage the agency's users.
- There is no limit on the number of Sys Admins an agency may have, but remember, the function is to manage and maintain user security of the CAPS system at your agency.

Note: Only HRA can set up the first Sys Admins for an agency. Contact HRACASSupport@hra.nyc.gov to set up a new Sys Admin.



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User Security – Updating an Existing User

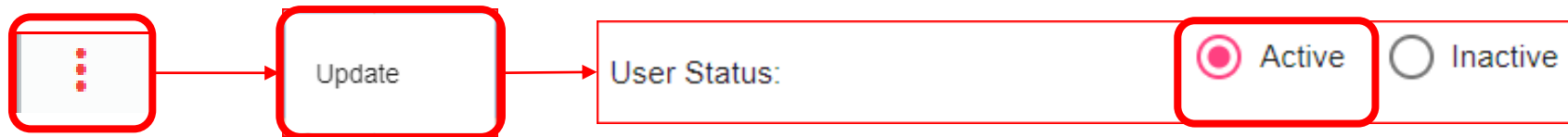
1. In CAPS > System Administration > User Security, find the user you wish to edit, click the 3 red dots/**Action** button next to their name, and select **Update**.
 - If updating the email address, please make sure it is correct in order to receive an MFA invitation
 - If adding or removing sites, please make sure there is at least one active user assigned to each site
2. Be sure to **Save** after making any necessary edits.



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User Security – Reactivating a User ID

1. In CAPS > System Administration > User Security, find the user you wish to edit, click the 3 red dots/**Action** button next to their name, and select **Update**.
2. Scroll down to the middle of the screen and click **User Status = Active**.





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User Security – Reactivating a User ID

3. Click **Save** at the bottom right of the screen

- When you are returned to the user screen, check to make sure that user now has Active status (appears as “A” in the User Status column).



4. User accounts which were Reactivated successfully will be identified by an automated process and MFA Invitation will be scheduled by the MFA team.

Note: Estimated wait time for the MFA invitation email is 1-2 weeks

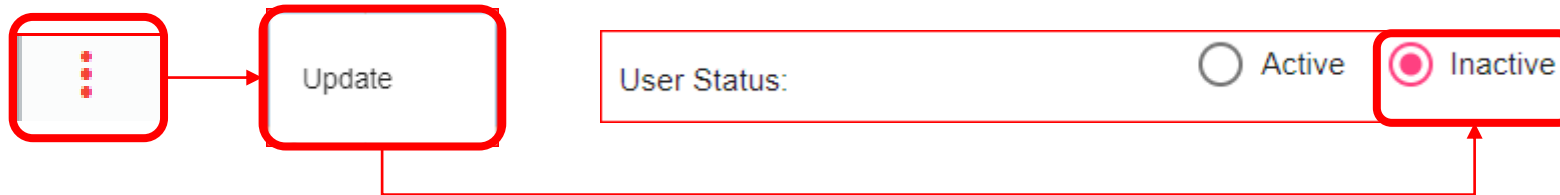
Note: A System Administrator may contact HRACASSupport@hra.nyc.gov to reactivate their own User ID.



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User Security – Deactivating a User ID

1. In CAPS > System Administration > User Security, find the user you wish to edit, click the 3 red dots/**Action** button next to their name, and select **Update**.
2. Scroll down to the middle of the screen and select **User Status = Inactive**.



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User Security – Deactivating a User ID

3. Select a deactivation **reason** from the drop-down menu.
4. Leave a **comment** in the text box explaining further the reason for deactivation.
5. Click **Save** at the bottom right of the screen.
 - When returned to the User Administration page, check to ensure sure that user now has Inactive status (appears as “I” in the User Status column).

The screenshot shows a form for deactivating a user. It includes a 'Reason:' label, a dropdown menu with options: 'Select One', 'Left Agency', 'No activity in more than 90 days', 'Unsuccessful log on - 3 attempts', and 'Other'. A 'Comment:' label is followed by a text input field. A blue 'Save' button is located to the right of the comment field. A green checkmark is positioned to the right of the 'Save' button. Red boxes and arrows highlight the 'Reason' dropdown, the 'Comment' text box, and the 'Save' button.



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User Security – CAPS Password

- When logging into CAPS, **use your agency email as the username, and the password for CAPS should be the same password you use to log into your agency email.**
- If you forget your password, you need to reset your agency email password with your **agency's internal IT team.**
 - You should contact your agency's IT person to see if they can help you with password recovery or reset, as this something only they have access to.