



2

CAPS Training Manual

Part 2: Vacancy Control System



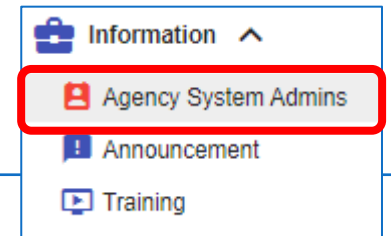


Table of Contents

Part 2: Survey & Application

- 2.1. [VCS Dashboard](#) Pages 3 – 13
- 2.2. [Site Request & Maintenance](#) Pages 14 – 25
- 2.3. [Rosters](#) Pages 26 – 52
- 2.4. [TADs](#) Pages 53 – 65
- 2.5 [Referral Request Queue \(RRQ\)](#) Pages 66 – 84

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



Important:

- **New Users:** Ask your System Administrator in your agency to add you as a 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 from 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



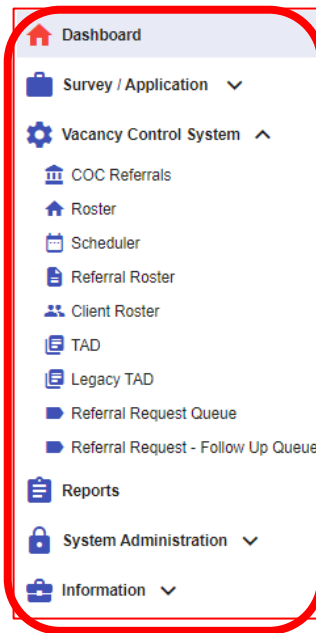
2.1

VCS Dashboard

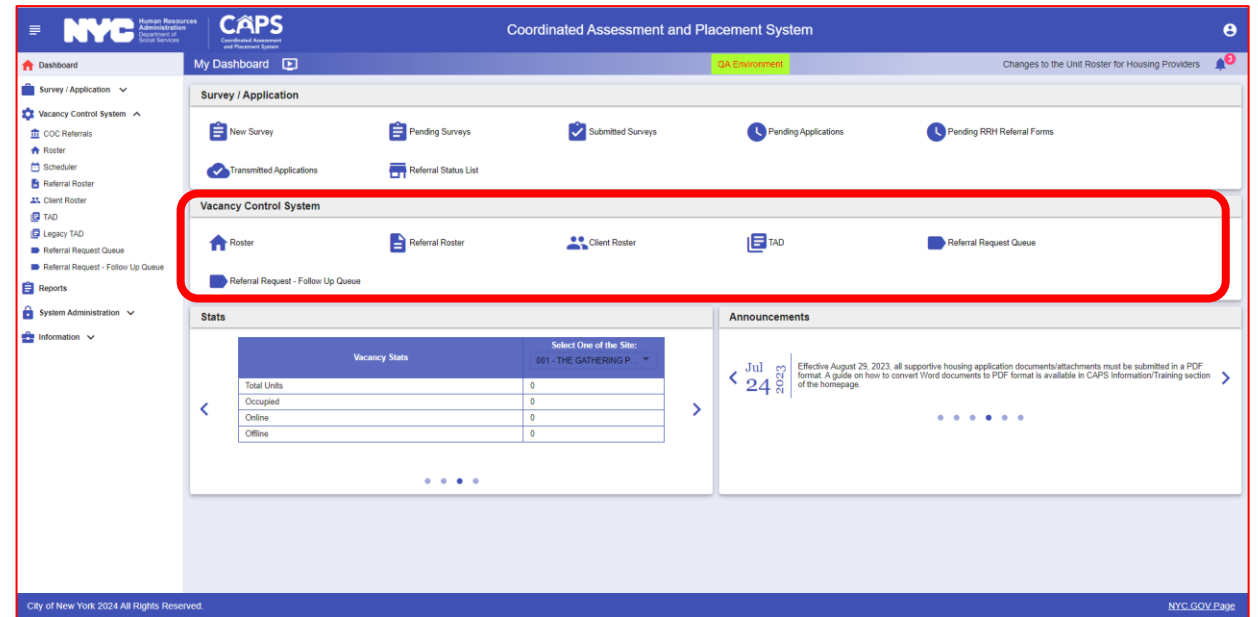
2.1

VCS Dashboard

- **VCS (Vacancy Control System)**
 - VCS includes the majority of NYC's supportive housing stock and allows for electronic referrals
 - Supportive housing providers can report move ins and move outs in real time



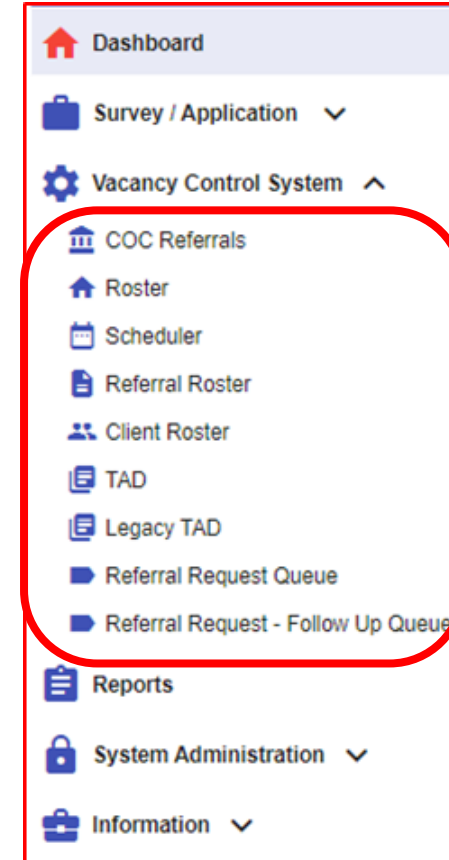
or



2.1

VCS Dashboard

- The **Vacancy Control System (VCS) Dashboard** menu allows users to access:
 - **CoC Referrals** (Currently Inactive)
 - **Roster**
 - **Scheduler**
 - **Referral Roster**
 - **Client Roster**
 - **TAD**
 - **Legacy TAD**
 - **Referral Request Queue**
 - **Referral Request- Follow Up Queue**
- This menu will only be available for users who are responsible for transmitting housing data.



2.1

VCS Dashboard

- **CoC (Continuum of Care) Referrals** directs users to a page that contains a list of the clients that have been referred to units that receive funding from the CoC via the Department of Housing Preservation and Development (HPD). This functionality is currently *Inactive*.

The screenshot displays the Vacancy Control System dashboard. On the left, a navigation menu is shown with the following items: Vacancy Control System (gear icon), COC Referrals (highlighted with a red box), Roster, Scheduler, Referral Roster, Client Roster, TAD, Legacy TAD, Referral Request Queue, and Referral Request - Follow Up Queue. A red arrow points from the COC Referrals menu item to the main content area.

The main content area shows the "CoC Referral Queue [7]" page. At the top right, there is a "QA Environment" label. Below this, there are filters for "Agency Name:" (with a dropdown arrow), "Site Name:" (with a dropdown arrow and "Select One" text), and "CoC Approval Status:" (with a dropdown arrow and "Select One" text). The main part of the page is a table with the following columns: Action, Client Name, Referring Agency/Site, HP Agency/Site, Eligibility, Prioritization, Service Needs, Placements Criteria, CoC Approval Status, Last Updated By, Last Updated Date, and Last Email Notification. The table contains 7 rows of data, each with a red vertical ellipsis icon in the Action column. The bottom right corner of the page shows "1 to 7 of 7" and navigation icons.

Action	Client Name	Referring Agency/Site	HP Agency/Site	Eligibility	Prioritization	Service Needs	Placements Criteria	CoC Approval Status	Last Updated By	Last Updated Date	Last Email Notification
⋮				SMI Singles; N...	SVA - Medium	Community Care; L...	Borough Preference:	Rejected Interview Outco...		06/08/2022	
⋮				SMI Singles; N...	SVA - Medium	Community Care; L...	Borough Preference:Bro...	Rejected Interview Outco...		06/08/2022	
⋮				SMI Singles; N...	SVA - Low	Community Care; L...	Borough Preference:Bro...	Pending Interview Outcome		08/17/2022	
⋮				SMI Singles; N...	SVA - Medium	Community Care; L...	Borough Preference:Bro...	Pending Interview Outcome		08/17/2022	
⋮				SMI Singles; N...	SVA - Medium	Community Care; L...	Borough Preference:	Pending at Placement Ag...		09/01/2022	
⋮				SMI Singles; N...	SVA - Medium	Community Care; L...	Borough Preference:Bro...	Pending Interview Outcome		09/01/2022	
⋮				SMI Singles; N...	SVA - Medium	Community Care; L...	Borough Preference:	Pending Interview Outcome		09/09/2022	

2.1

VCS Dashboard

- **Roster** takes users to the rosters for their assigned sites and allows them to update information for each unit within the program.

The screenshot displays the VCS Dashboard interface. On the left, a navigation menu is shown with the 'Roster' option highlighted in a red box. A red arrow points from this menu item to the main content area. The main content area shows the 'Roster' page, which includes a header with 'Roster' and 'QA Environment'. Below the header, there are two dropdown menus: 'Site Name' (set to 'Select') and 'Primary Service Contract'. The main section is titled 'Roster [0/0]' and contains a form with several fields: 'Name', 'Features', 'Primary Service Contract', 'Contracting Agency', 'Rental Subsidies', 'Status', and 'Type'. There are 'Add' and 'Clear' buttons below the form. At the bottom, there is a table with columns for 'Actions', 'Primary Service Agreement...', 'Contracting Agency', 'Name', 'Type', 'Status', 'Features', and 'Subsidies'. The table is currently empty, showing 'No Rows To Show'. A 'Back' button is located at the bottom right of the page.

2.1

VCS Dashboard

- **The Re-Rental Scheduler** allows users to select dates and times for upcoming re-rental supportive housing interviews via Request a Referral (RRQ).

The screenshot displays the VCS Scheduler interface. On the left is a navigation menu with the following items: Dashboard, Survey / Application, Vacancy Control System, COC Referrals, Roster, Scheduler (highlighted with a red box), Referral Roster, Client Roster, TAD, Legacy TAD, Referral Request Queue, Referral Request - Follow Up Queue, Reports, System Administration, and Information. A red arrow points from the Scheduler menu item to the Scheduler page in the main window.

The Scheduler page features a header with "Scheduler" and "QA Environment". Below the header are input fields for "Agency:" and "Site:". A notification banner states: "Interview preferred time slots must be selected no less than five business days from today's date. Please note preferred time slots can be selected only on the Week and Day view".

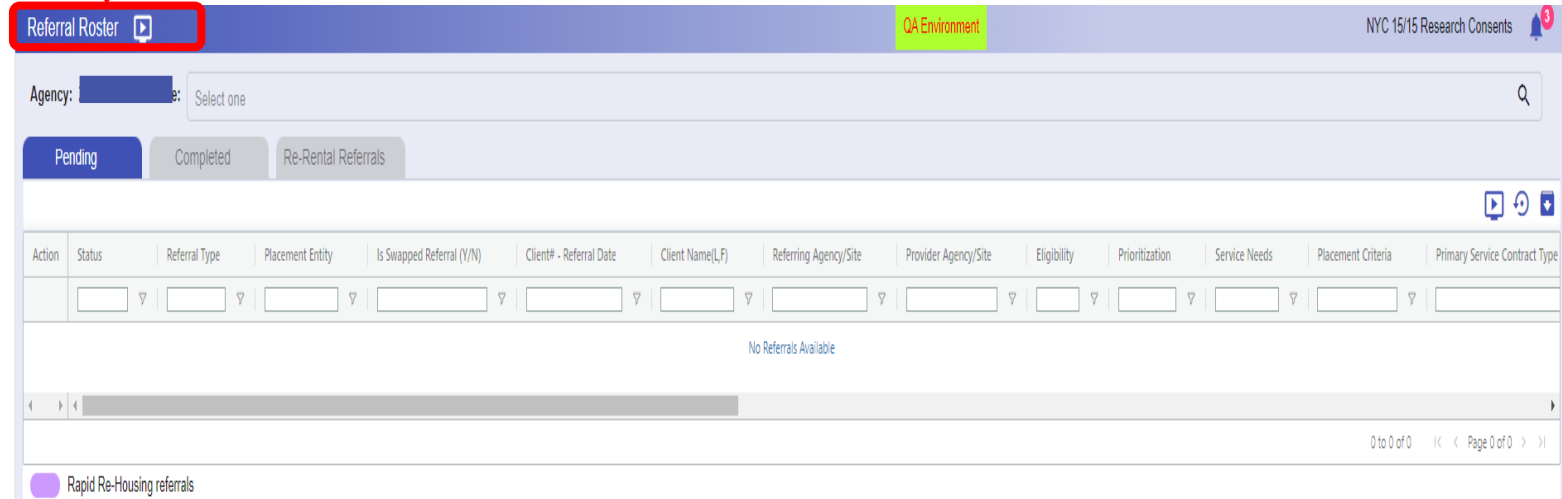
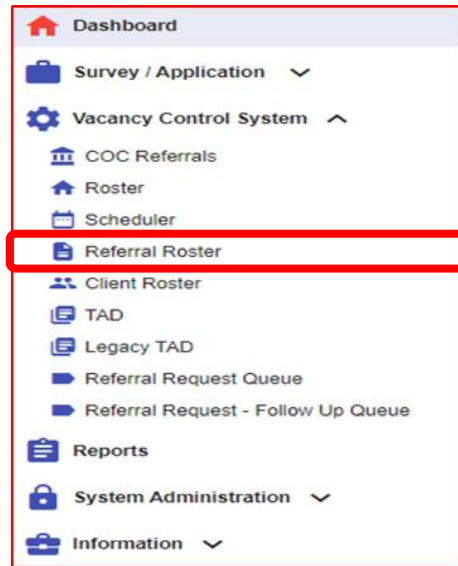
The main content area shows a calendar for "Sep 11 - Sep 17, 2022". The calendar has columns for each day of the week and rows for time slots from 8 AM to 9 PM. A blue bar is visible above the calendar grid. A legend at the bottom indicates that green bars represent "Preferred Interview Slots" and red bars represent "Unavailable (Occupied)".

	Sunday Sep 11	Monday Sep 12	Tuesday Sep 13	Wednesday Sep 14	Thursday Sep 15	Friday Sep 16	Saturday Sep 17
8 AM							
9 AM							
10 AM							
11 AM							
12 PM							
1 PM							
2 PM							
3 PM							
4 PM							
5 PM							
6 PM							
7 PM							
8 PM							
9 PM							

2.1

VCS Dashboard

- **Referral Roster** allows users to update referral outcomes for clients, including interview outcomes and move-in information.



2.1

VCS Dashboard

- **Client Roster** allows users to move clients in and out of specific units for their assigned sites.

The screenshot displays the VCS Dashboard interface. On the left, a sidebar menu lists various navigation options. The 'Client Roster' option is highlighted with a red box. A red arrow points from this menu item to the 'Client Roster' tab in the main application window. The main window shows the 'Client Roster' page with a search bar, summary statistics, and a table of client data.

Client Roster Summary:

- Total Units: 97
- Occupied: 0
- Online: 97
- Offline: 0
- Pending Move-Ins: 0
- Pending Move-Outs: 0

Client Roster Table:

Action	Client# - ReferralDate	Client Name (LF)	Name	Status	Primary Service Contract	Rental Subsidies	Client Voucher	Referring Agency/Site	Client Eligibility	Prioritization	Entry Date
⋮			UNIT-1B	Unit-Online	ESSHI - SENIOR	ESSHI					
⋮			UNIT-1A	Unit-Online	ESSHI - MH-FA	ESSHI					
⋮			UNIT-3A	Unit-Online	NYC 15/15 - FC	NYC 15/15 Rental Su...					
⋮			UNIT-2H	Unit-Online	NYC 15/15 - FC	NYC 15/15 Rental Su...					
⋮			UNIT-3S	Unit-Online	NYC 15/15 - FC	NYC 15/15 Rental Su...					
⋮			UNIT-1C	Unit-Online	ESSHI - SENIOR	ESSHI					
⋮			UNIT-1G	Unit-Online	ESSHI - MH-AD	ESSHI					
⋮			UNIT-1L	Unit-Online	ESSHI - SENIOR	ESSHI					
⋮			UNIT-2C	Unit-Online	ESSHI - SENIOR	ESSHI					
⋮			UNIT-2D	Unit-Online	ESSHI - SENIOR	ESSHI					

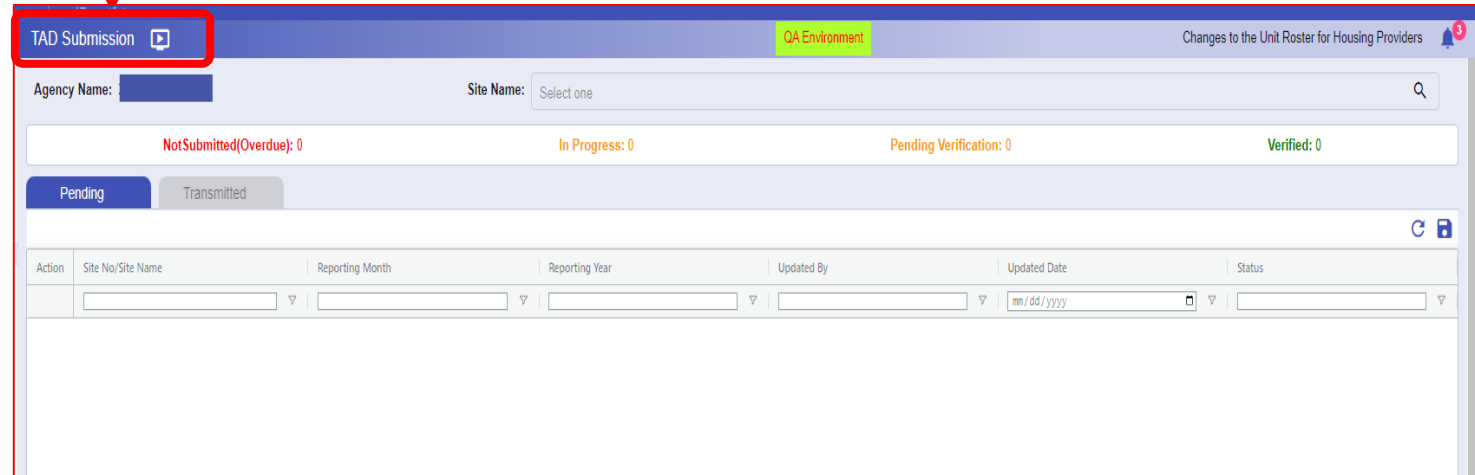
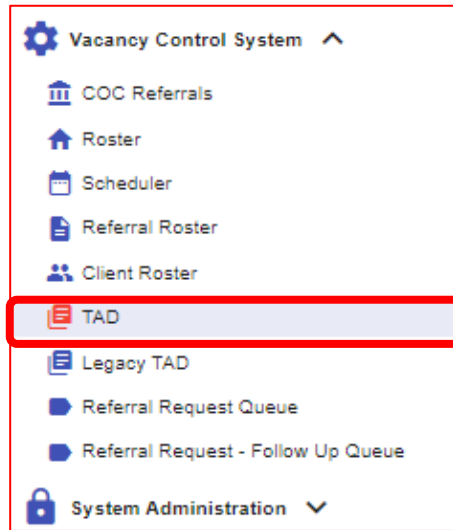
1 to 10 of 97 | Page 1 of 10

Assign Client to #

2.1

VCS Dashboard

- **TAD** takes users to the TAD (Turn Around Document) **Submission** page, which allows users to submit monthly occupancy reports for their assigned sites.



2.1

VCS Dashboard

- **Legacy TAD** allows users to search through the agency's past submitted TADs using the Site, Report Year, and Report Month.

The screenshot displays the VCS Dashboard interface. On the left, a navigation menu is visible with the following items: Vacancy Control System (with a gear icon and an upward arrow), COC Referrals, Roster, Scheduler, Referral Roster, Client Roster, TAD, Legacy TAD (highlighted with a red box), Referral Request Queue, Referral Request - Follow Up Queue, and System Administration (with a lock icon and a downward arrow). A red arrow points from the 'Legacy TAD' menu item to the main content area. The main content area is titled 'Legacy TADS' and includes a 'QA Environment' indicator in the top right corner. Below the title, a red instruction reads: 'Please enter the following information and click Submit in order to proceed.' The form contains five fields: 'Agency:' (a dark blue dropdown menu), 'Site:' (a white dropdown menu), 'Report Year:' (a white dropdown menu), 'Report Month:' (a white dropdown menu), and 'Report Type:' (a white dropdown menu). At the bottom left of the form is a red 'Clear' button, and at the bottom right are blue 'Submit' and 'Exit' buttons.

2.1

VCS Dashboard

- **Referral request Queue** allows users to view active referral request under the Transmitted, Pending and Completed tabs.

The screenshot displays the VCS Dashboard interface. On the left is a navigation menu with the following items: Dashboard, Vacancy Control System (expanded), COC Referrals, Roster, Scheduler, Referral Roster, Client Roster, TAD, Legacy TAD, **Referral Request Queue** (highlighted with a red box), Referral Request - Follow Up Queue, and System Administration. The main content area is titled "Referral Request Queue" and includes a "QA Environment" label and "NYC 15/15 Research Consents" with a notification icon. Below the title is a search bar for "Agency:" with a dropdown menu set to "All" and a search icon. The interface features several tabs: "Pending Schedule.", "Scheduled:", "Withdrawn Request", "Cancelled Request:", and "Referrals Completed:". Below these are three sub-tabs: "Transmitted" (active), "Pending", and "Completed". A table is visible below the sub-tabs, with columns for Action, Transmitted Date, Agency No / Agency Name, Site No / Site Name, Site Address, Primary Service Contract, Rental Subsidies, Name, Type, Wheelchair Accessible, HUD Chronic, and Site Location. The table contains one row with a date input field (mm/dd/yyyy) and several dropdown menus. At the bottom right, there is a pagination indicator showing "1 to 1 of 1" and "Page 1 of 1".



2.2

Site Request & Maintenance

- [Request New Site](#)
- [Agency/Site Maintenance](#)

2.2

Site Request & Maintenance - Request New Site

1. CAPS Dashboard > System Administration > **Agency/Site Profile** will bring you to the **Agency Site Maintenance** page.
2. Click **Request New Site** to start the process of requesting a new site.
3. In the Request a New Site page, **all fields in red must be completed** and cannot be left blank.

15

Part 2: Vacancy Control System

The screenshot illustrates the navigation process within the CAPS system. On the left, the 'System Administration' menu is expanded, with 'Agency/Site Profile' selected. This leads to the 'Agency Site Maintenance' page, where the 'Request New Site' button is highlighted. Clicking this button leads to the 'Request a New Site' form. The form contains several fields that are highlighted in red, indicating they are required for completion: Agency Name, Site Name, Site Address, City, State, Zip, and Borough. The form also includes a 'Proceed' button and a radio button option for 'Is this a housing provider Site?'.

Act...	Agency/Si...	Site Name	Address	Site Status	Housing Program Model/...	Site Categ...	Site Locat...
Active	DHS CONTRACTED DROP-IN ...	Referring Ag...					
Active	DHS SINGLE MUNICIPAL/CO...	Referring Ag...	Congregate S...				
Active	DHS SINGLE MUNICIPAL/CO...	Referring Ag...	Congregate S...				
Active	DHS SINGLE MUNICIPAL/CO...	Referring Ag...	Congregate S...				
Active	DHS FAMILY MUNICIPAL/CO...	Referring Ag...					
Active	HASA TRANSITIONAL RESIDE...	Referring Ag...					
Active	CASE MANAGEMENT SERVICES	Referring Ag...					
Active	MENTAL HEALTH SERVICE	Referring Ag...					
Active	DHS FAMILY MUNICIPAL/CO...	Referring Ag...					
Active	DHS FAMILY MUNICIPAL/CO...	Referring Ag...					
Active	DHS FAMILY MUNICIPAL/CO...	Referring Ag...					

2.2

Site Request & Maintenance - Request New Housing Provider Site

4. When you've added all the necessary information, press the **Add New Site button to save your work.**
 - In the upper right-hand corner of the screen a **green pop-up** message will appear, indicating the information has been saved successfully, and the site name will appear in a blue tab (top of page).
5. Alternatively, if you wish to delete the information entered, press the Clear button.
6. Clicking Proceed before Add New Site will cause an error message to pop up.
7. Only **after all new site info has been entered, click the Proceed** button to fill out the Site Profile sections.

The image displays a screenshot of a web application interface for requesting a new site. The main form area includes fields for Agency Name, Site Name, Site Address, City, State, Zip, Borough, and a dropdown for 'Select the site type'. There are 'Add New Site' and 'Clear' buttons. A 'Proceed' button is located at the bottom of the form. A green pop-up message in the top right corner reads 'Site Added Successfully Added'. A blue tab in the top navigation bar contains the text 'TEST'. Red boxes and arrows highlight the 'Add New Site' button, the green pop-up, the 'TEST' button, and the 'Proceed' button.

2.2

Site Request & Maintenance - Request New Site

8. In the **Site Profile**, you must complete the 3 tabs displayed across the top of the screen. To-do items are marked with the yellow clock icon, and become green check marks upon completion:
- **Site Demographics** → **Site Contact** → **Primary Service Contract and Unit Details**

The screenshot shows the 'Site Profile' form in a 'QA Environment'. The form is divided into three tabs: 'Site Demographics', 'Site Contact', and 'Primary Service Contract and Unit Details'. The 'Site Demographics' tab is currently selected and highlighted with a red box. The form contains the following fields and options:

- Agency Name: [Text Input]
- Agency Address: [Text Input]
- Site Name: [Text Input]
- Site Address: [Text Input]
- Site Demographics (Active Tab):
 - Please select the type of the site: Congregate Site Scatter Site
 - Level of Care: [Dropdown Menu]
 - Housing Program Model: [Dropdown Menu]
 - Site Features: [Dropdown Menu]
 - Is the Interview location same as the site: Yes No

At the bottom of the form, there is a 'Submit' button on the left and a 'Next' button on the right. A yellow clock icon with a red '1' is located in the top right corner of the form area.

2.2

Site Request & Maintenance - Request New Site

9. In Site Profile > **Site Demographics**, select the **type of site, Congregate or Scattered Site**
 - Additional fields will appear depending on type of site selected

Congregate Site

Site Profile

Agency Name: Agency Address: Site Name: Site Address

Site Demographics Site Contact Primary Service Contract and Unit Details

Please select type of the site Congregate Site Scattered Site

TCO (Temporary Certificate of Occupancy) ready? Yes No

Is this a tax credit building? Yes No

Level of Care: Select

Housing Program Model: Select

Site Features: Select

Is the interview location the same as the site? Yes No

Submit Next

- TCO (Temporary Certificate of Occupancy) ready? (Yes/No)
 - If Yes, specify contract start date
 - If No, specify the expected date
- Is this a tax credit building ? (Yes/No)
 - If Yes, Maximum Income for Studio & Maximum Income for One Bedroom

Scatter Site

Site Profile

Agency Name: Agency Address: Site Name: Site Address

Site Demographics Site Contact Primary Service Contract and Unit Details

Please select type of the site Congregate Site Scattered Site

Is the Site Contracted? Yes No

Level of Care: Select

Housing Program Model: Select

Site Features: Select

Is the interview location the same as the site? Yes No

Submit Next

- Is the Site Contracted (Yes/No)
 - If Yes, specify contract start date
 - If No, specify the expected date

2.2

Site Request & Maintenance - Request New Site

10. In Site Profile > **Site Demographics**, select the appropriate **Level of Care** using the drop-down.
 - For the majority of housing providers, the correct entry will be **Community Care** for both Congregate and Scatter sites.
11. Then, select the **Housing Program Model** from the drop-down.
 - For the majority of housing providers, the correct entry will be **Supportive Housing Provider** for both Congregate and Scatter sites.

Congregate Site

The screenshot shows the 'Site Profile' form for a Congregate Site. The 'Site Demographics' tab is active. The form includes fields for Agency Name, Agency Address, Site Name, and Site Address. Below these are several questions and dropdown menus. A red box highlights the 'Level of Care' and 'Housing Program Model' dropdown menus. The 'Level of Care' dropdown is currently set to 'Select', and the 'Housing Program Model' dropdown is also set to 'Select'. Other questions include 'Please select the type of the site' (Congregate Site selected), 'TCO (Temporary Certificate of Occupancy) ready?', 'Is this a tax credit building?', and 'Is the interview location same as the site'.

Scatter Site

The screenshot shows the 'Site Profile' form for a Scatter Site. The 'Site Demographics' tab is active. The form includes fields for Agency Name, Agency Address, Site Name, and Site Address. Below these are several questions and dropdown menus. A red box highlights the 'Level of Care' and 'Housing Program Model' dropdown menus. The 'Level of Care' dropdown is currently set to 'Select', and the 'Housing Program Model' dropdown is also set to 'Select'. Other questions include 'Please select the type of the site' (Scatter Site selected), 'Is the Site Contracted', and 'Is the interview location same as the site'.

2.2

Site Request & Maintenance - Request New Site

12. Continuing in Site Profile > **Site Demographics**, select the applicable **Site Features** (for site overall).
13. Then, answer 'Is the **Interview location** same as the site,' by selecting the Yes or No radio button.
 - If No is selected, you will be prompted to enter the interview address and phone contact number.
14. Click **Next** to proceed to the next section, **Site Contact**.

Congregate Site

The screenshot shows the 'Site Profile' form for a 'Congregate Site'. The 'Site Demographics' tab is active. The form includes fields for Agency Name, Agency Address, Site Name (EST), and Site Address (EST, TESTAA, 11111). Below these are several questions with radio buttons or dropdown menus: 'Please select the type of the site' (Congregate Site selected), 'TCO (Temporary Certificate of Occupancy) ready?' (Yes/No), 'Is this a tax credit building?' (Yes/No), 'Level of Care' (dropdown), 'Housing Program Model' (dropdown), 'Site Features' (dropdown, highlighted with a red box), and 'Is the interview location same as the site' (Yes/No). A 'Next' button is at the bottom right.

Scatter Site

The screenshot shows the 'Site Profile' form for a 'Scatter Site'. The 'Site Demographics' tab is active. The form includes fields for Agency Name (C), Agency Address, Site Name (EST), and Site Address (EST, TESTAA, 11111). Below these are several questions with radio buttons or dropdown menus: 'Please select the type of the site' (Scatter Site selected), 'Is the Site Contracted' (Yes/No), 'Level of Care' (dropdown), 'Housing Program Model' (dropdown), 'Site Features' (dropdown, highlighted with a red box), and 'Is the interview location same as the site' (Yes/No). A 'Next' button is at the bottom right.

Next

✓ Save Success
Successfully Saved

2.2

Site Request & Maintenance - Request New Site

15. In Site Profile > **Site Contact**, all **red** fields must be completed (cannot be left blank).
16. Enter the contact information for the designated System Administrator and **select the 'Sys Admin' box only if the user is brand new**
17. Click **Save** to add the site contact (will appear in list below), and enter any additional site contacts, clicking **Save** after each new contact.
18. Click **Next** to proceed to the next section, **Primary Service Contract and Unit Details**.

✓ **Save**
Contact saved successfully.

2.2

Site Request & Maintenance - Request New Site

19. In **Primary Service Contract and Unit Details**, all units with corresponding details must be entered.
20. Select the **Primary Service Contract** and enter the **Number of Units**, then click **Save** to add the contract to the site (will add contract to list); this will refresh the form, so you may continue adding any other applicable contracts for the site and click **Save** after each to add to the site.
21. Please **have all unit details for the site readily available** to complete the roster for the new site(s)

The screenshot shows a web application interface for 'Primary Service Contract and Unit Details'. At the top, there are three tabs: 'Site Demographics' (checked), 'Site Contact' (checked), and 'Primary Service Contract and Unit Details' (active). Below the tabs, there is a form with a dropdown menu labeled 'Primary Service Contract' (with 'Select' as the current value) and an input field labeled 'No. of Units'. To the right of these fields are 'Save' and 'Clear' buttons. A red box highlights the dropdown and input field. Below the form is a table with columns: 'Actions', 'Primary Service Contract', 'Funding Source', and 'No. of Units'. The table is currently empty, displaying the message 'No primary service contract are available'. At the bottom of the page are 'Exit', 'Submit', and 'Previous' buttons. A red arrow points from the 'Save' button to a green success message box on the right.


✓ **Save**
Primary Service Contract saved successfully.

2.2

Site Request & Maintenance - Request New Site

22. **Roster Details** under each contract must be entered; select the Roster Icon (middle icon in the Action column) next to a contract to open the Roster Details form.
23. Enter the information for a unit in all red (required) fields and click **Add** to save each unit.
24. The **Roster Counter** at the top keeps track of the # of units created for that contract.

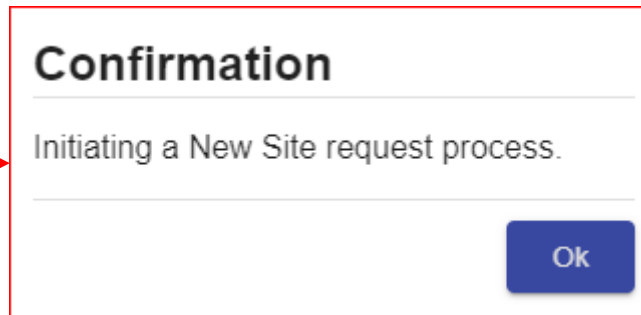
The screenshot displays the 'Roster Details' form for a contract. At the top, a 'Roster Counter' shows 0 units. The form contains several required fields, marked with red boxes: 'Contracting Agency', 'Name', 'Type', 'Status', 'features', and 'Rental Subsidies'. An 'Add' button is also highlighted in red. The form is part of a larger interface with tabs for 'Site Demographics', 'Site Contact', and 'Primary Service Contract and Count Details'. A red arrow points from the 'Roster' button in the 'Actions' column of the 'Primary Service Contract' table to the Roster Details form.



2.2

[Site Request & Maintenance](#) - Request New Site

25. The **Submit (bottom left)** button will be **enabled after all units and corresponding details** are entered; **click to transmit your new site request.**





2.2

Site Request & Maintenance – Agency/Site Maintenance

- **To add an additional Site Contact**, simply go to System Administration > Agency/Site profile and select the site you plan to edit.
- **For any other changes to the site**, including address, Primary Service Contract, number of units and/or unit features, please contact your TAD liaison on the Coordinated Entry team.
- Any time you need to **update** which staff are assigned to specific sites you can do so in **User Security**.
- **All users assigned to sites and the site contacts will receive email notifications** for upcoming referrals, so please keep this up to date



2.3

Rosters

- Roster
- Referral Roster
- Client Roster



2.3

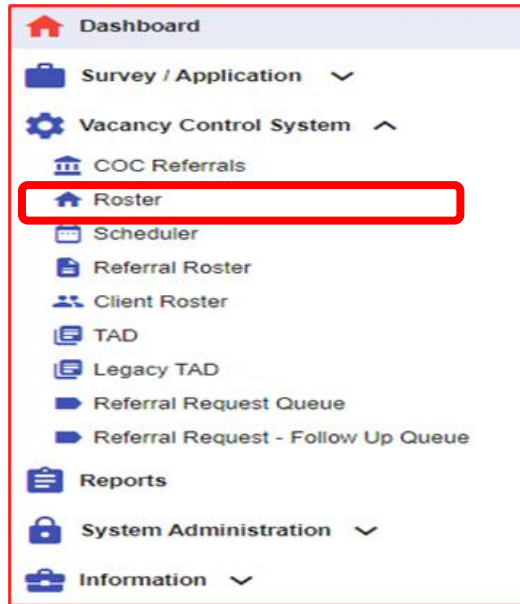
Roster

- You must complete **all unit information before moving-in** any tenants.
- Once a unit is **occupied, you cannot edit some unit details such as unit name or primary service contract**
- You can always update rental subsidy, unit type and unit features regardless of unit status.
- Housing Providers are required to:
 - Enter details about each unit in their site
 - Update referral outcomes
 - Record move-ins and move-outs for each client
- Upon login, users will be prompted to complete their Rosters.
 - CAPS generates pop-up reminders about an incomplete Rosters until all mandatory fields are completed.
 - Until you complete all unit details for each site, you will be re-directed to the site with the largest number of incomplete units.

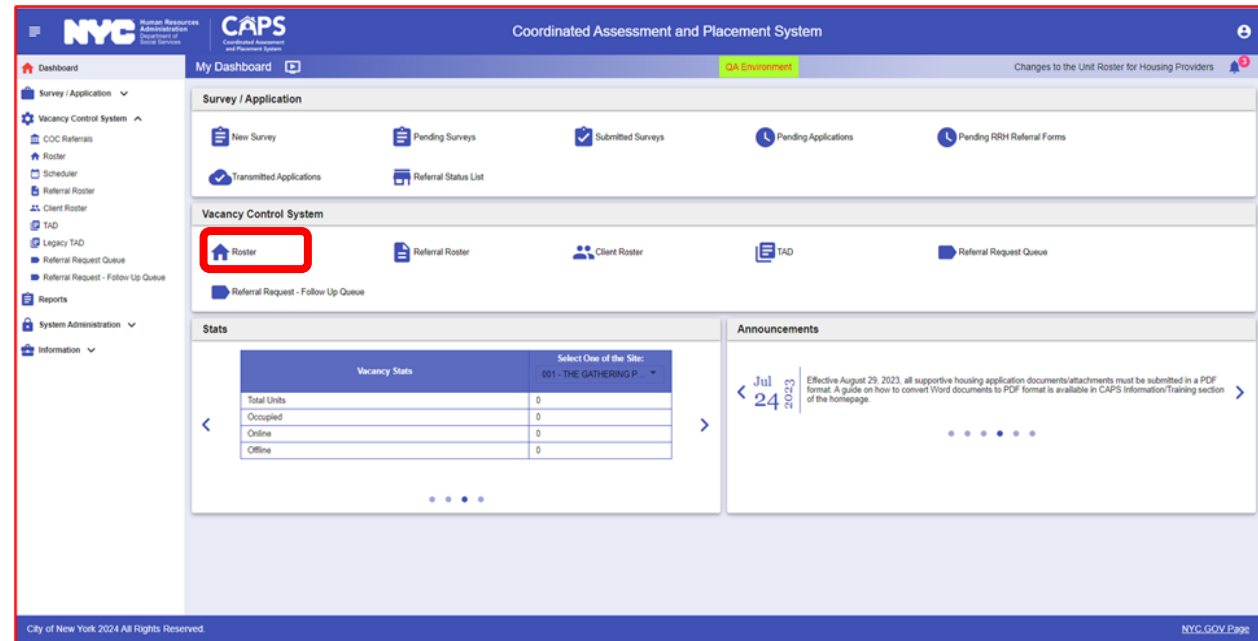
2.3

Rosters – Roster

- Users can access their Rosters by going to Dashboard > VCS > **Roster**.



or



2.3

Rosters – Roster

1. From the Roster screen, select the **Site Name** from the drop-down menu.
 - If you do not find the site, it may mean one of two things:
 - You are not assigned to that particular site. Please contact your System Administrator to have the site assigned.
 - Your site does not exist in the system and must be created by Requesting a New Site.
2. Select the **Primary Service Contract** from the drop-down menu, which lists all approved contracts for the selected site, or select All.

The screenshot shows the 'Roster' screen in a QA Environment. The 'Roster' tab is selected. The 'Site Name' dropdown menu is highlighted with a red box, and the 'Primary Service Contract' dropdown menu is also highlighted with a red box. Below these are various input fields for Name, Features, Contracting Agency, Rental Subsidies, Status, and Type, along with 'Add' and 'Clear' buttons.

2.3

Rosters – Roster

- CAPS provides a **Roster Counter** (located just above the unit details window) which provides a tally of the number of created units vs. the number of total units in the contract.

The screenshot shows the 'Roster' interface in a QA Environment. At the top, there are fields for 'Site Name', 'Site Address', and 'Primary Service Contract' (set to 'ALL'). Below these is the 'Roster Counter' button, which is highlighted with a red box and labeled 'Roster [53/56]'. Underneath the counter is a form for adding units with the following fields:

- Name: UNIT-
- Features: [Dropdown]
- Primary Service Contract: [Dropdown]
- Contracting Agency: [Dropdown]
- Rental Subsidies: [Dropdown]
- Status: [Dropdown]
- Type: [Dropdown]

At the bottom of the interface is a table with the following columns: Actions, Primary Service Agreement..., Contracting Agency, Name, Type, Status, Features, and Subsidies. The table contains the following data:

Actions	Primary Service Agreement...	Contracting Agency	Name	Type	Status	Features	Subsidies
⋮	Community Units		UNIT-2A		Unit-Occupied	Private Bathroom-Yes, Private Kitchen...	NONE
⋮	SMI Singles		UNIT-2B		Unit-Occupied	Private Bathroom-Yes, Private Kitchen...	Section 8 - HPD
⋮	SMI Singles		UNIT-2C		Unit-Occupied	Private Bathroom-Yes, Private Kitchen...	Section 8 - HPD
⋮	SMI Singles		UNIT-2D		Unit-Occupied	Private Bathroom-Yes, Private Kitchen...	Section 8 - HPD
⋮	SMI Singles		UNIT-2E		Unit-Online	Wheelchair accessible unit, Private Ba...	Section 8 - HPD



2.3

Rosters – Roster

4. Required Details for Each Unit:

Adding **Online** units:

- **Primary Service Contract:** Select the applicable contract for the unit (only contracts associated with that site will be available).
- **Unit Name:** Name for unit, to be used across CAPS.
- **Unit Features:** Select all that apply from drop-down menu.
- **Contracting Agency:** Select applicable from drop-down.
- **Rental Subsidies:** Select applicable from drop-down.
- **Unit Status:** **Unit-Online (means unit is available and ready to be filled/leased)**
- **Unit Type:** Select applicable from drop-down.
- Unit Address, City, State, Zip (for scattered site only)

Adding **Offline** units:

- Primary Service Contract:** Select the applicable contract for the unit (only contracts associated with that site will be available).
- **Unit Name:** Name for unit, to be used across CAPS.
- **Unit Features:** Select all that apply from drop-down menu.
- **Contracting Agency:** Select applicable from drop-down.
- **Rental Subsidies:** Select applicable from drop-down.
- **Unit Status:** **Unit-Offline (means unit is NOT available or ready to be filled/leased)**
 - **Offline Reason:** Select applicable from drop-down.
 - **Expected Available Date:** Select date from calendar.
 - Comments (optional)
- **Unit Type:** Select applicable from drop-down.
- Unit Address, City, State, Zip (scattered site only)

2.3

Rosters – Roster

Unit Type Description:

- **Shared Apartment:** Private Bedroom within a shared apartment (scattered site).
- **Shared Unit:** Entire unit, including bedroom, is shared .
- **Suites:** Separate bedroom with connected shared kitchen and/or bathroom (congregate).
- **SRO:** Individual unit, shared kitchen and bathroom .
- **Studio:** Entire apartment is not shared- single person.
- **1-Bedroom:** Apartment for a single adult, adult family or family with one child.
- **2-Bedroom, 3-Bedroom, 4-Bedroom:** Entire apartment is not shared- family units .
- **Unspecified:** Unknown unit type, only applicable for a scattered site unit not yet rented

The screenshot displays the 'Roster [97/97]' form. On the left is a vertical list of unit types: Shared Apartment, Shared Unit, Suites, SRO, Studio, and One-Bedroom. A red arrow points from the 'Shared Apartment' option to the 'Type' dropdown menu in the main form area. The main form contains several fields: Name (UNIT-), Features, Contracting Agency, Rental Subsidies, Status, and Primary Service Contract. The 'Type' dropdown is highlighted with a red box. At the bottom are 'Add' and 'Clear' buttons.

2.3

Rosters – Roster

Adding **Offline** Scatter Site units:

If the housing provider returns a unit to a landlord, no longer has control of a specific unit, or otherwise is not providing services to anyone in the unit, please complete the following steps in CAPS

- **Unit Status:** flip to **Unit-Offline** and complete the rest of the required fields.
- **Offline Reason:** select “**Scatter Site Leasing Issue**”.
- **Expected Available Date:** enter a timeframe by which the housing provider reasonably expects to lease a new unit for this contract. CAPS allows 120 days, but if at the end of the 120 days a new unit has not been found, please update CAPS.
- **Unit Name:** Change to “**No Unit**”. Please do not use “placeholder” “TBD” “Dummy” or any other unit name.
- Delete the unit address information
- Click “Save”

The screenshot shows the CAPS Roster form in the QA Environment. The form is titled "Roster" and "NYC 15/15 Research Consents". The unit name is "UNIT-NO UNIT". The contracting agency is "DOHMH". The status is "Unit-Offline". The type is "One-Bedro...". The unit address field is empty. The offline reason dropdown menu is open, showing "Scatter site leasing issue" as the selected option. The "Save" and "Clear" buttons are visible at the bottom.

2.3

Rosters – Roster

- After all mandatory information has been entered, click the **Add** button to save your work and add the unit to the roster.
 - The number of units counted at the top of the page will increase as units are added.
 - The Roster at the bottom of the screen lists each unit and their details individually.

The screenshot displays the 'Roster' management interface. At the top, there are input fields for 'Site Name', 'Site Address', and 'Primary Service Contract' (set to 'ALL'). Below this is a section for 'Roster [53/56]' with various dropdown menus for 'Name', 'Features', 'Primary Service Contract', 'Contracting Agency', 'Rental Subsidies', 'Status', and 'Type'. A red box highlights the 'Add' button. At the bottom, a table lists existing units with columns for Actions, Primary Service Agreement, Contracting Agency, Name, Type, Status, Features, and Subsidies.

Actions	Primary Service Agreement...	Contracting Agency	Name	Type	Status	Features	Subsidies
⋮	Community Units		UNIT-2A		Unit-Occupied	Private Bathroom-Yes, Private Kitchen...	NONE
⋮	SMI Singles		UNIT-2B		Unit-Occupied	Private Bathroom-Yes, Private Kitchen...	Section 8 - HPD
⋮	SMI Singles		UNIT-2C		Unit-Occupied	Private Bathroom-Yes, Private Kitchen...	Section 8 - HPD
⋮	SMI Singles		UNIT-2D		Unit-Occupied	Private Bathroom-Yes, Private Kitchen...	Section 8 - HPD
⋮	SMI Singles		UNIT-2E		Unit-Online	Wheelchair accessible unit, Private Ba...	Section 8 - HPD

2.3

Rosters – Roster

6. To edit a unit from the Roster, select the row with the unit you'd like to edit, click its 3 red dots/Action button, and select **Edit**.
7. To save your work, press **Save** before exiting or editing another unit.


The screenshot shows the 'Roster' interface with the following elements:

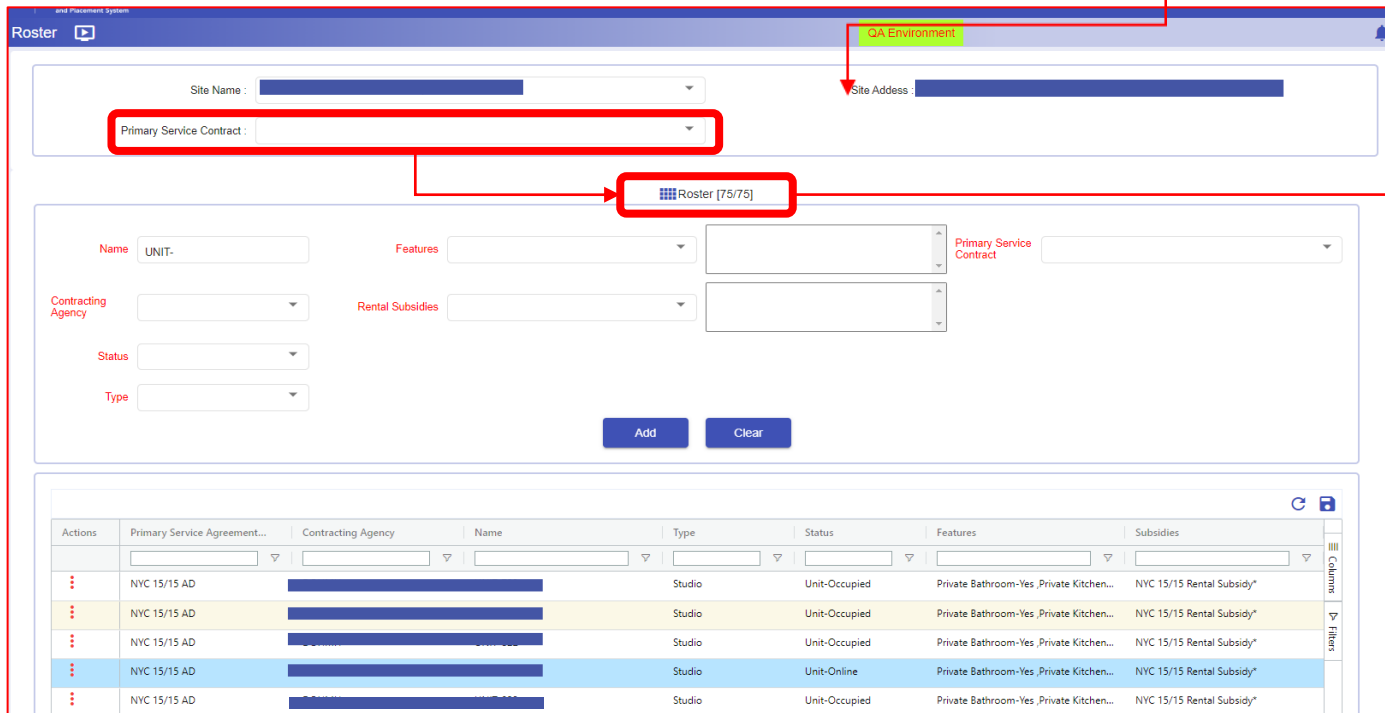
- Form Fields:** Site Name, Site Address, Primary Service Contract (set to ALL), Name (UNIT-), Features, Contracting Agency, Rental Subsidies, Status, Type, and Primary Service Contract.
- Buttons:** Add and Clear.
- Table:** A table with columns: Actions, Primary Service Agreement..., Contracting Agency, Name, Type, Status, Features, and Subsidies. The table contains several rows of unit data, including 'Community Units', 'SMI Singles', and 'SRO Suites-Individual ...'.
- Annotations:** A red box highlights the unit details form. A red box highlights the 'Edit' option in the actions menu for the first 'SMI Singles' row. A callout box on the left shows the 'Edit' and 'Request Referral' options.

Actions	Primary Service Agreement...	Contracting Agency	Name	Type	Status	Features	Subsidies
⋮			Community Units	SRO Suites-Individual ...	Unit-Occupied	Private Bathroom-Yes, Private Kitchen...	NONE
⋮			SMI Singles	SRO Suites-Individual ...	Unit-Occupied	Private Bathroom-Yes, Private Kitchen...	Section 8 - HPD
⋮			SMI Singles	SRO Suites-Individual ...	Unit-Occupied	Private Bathroom-Yes, Private Kitchen...	Section 8 - HPD
⋮			SMI Singles	SRO Suites-Individual ...	Unit-Occupied	Private Bathroom-Yes, Private Kitchen...	Section 8 - HPD
⋮			SMI Singles	SRO Suites-Individual ...	Unit-Online	Wheelchair accessible unit, Private Ba...	Section 8 - HPD

2.3

Rosters – Roster

8. To check the **breakdown of contracts and # of units** in a site, select a Primary Service Contract from the drop-down and check the Roster Counter.
9. A **complete** Roster will have **# of units created = # of units contracted** for all contracts. 



QA Environment

Site Name: [] Site Address: []

Primary Service Contract: []

Roster [75/75]

Name: UNIT- Features: [] Primary Service Contract: []

Contracting Agency: [] Rental Subsidies: []

Status: [] Type: []

Add Clear

Actions	Primary Service Agreement...	Contracting Agency	Name	Type	Status	Features	Subsidies
⋮	NYC 15/15 AD	[]	[]	Studio	Unit-Occupied	Private Bathroom-Yes, Private Kitchen...	NYC 15/15 Rental Subsidy*
⋮	NYC 15/15 AD	[]	[]	Studio	Unit-Occupied	Private Bathroom-Yes, Private Kitchen...	NYC 15/15 Rental Subsidy*
⋮	NYC 15/15 AD	[]	[]	Studio	Unit-Occupied	Private Bathroom-Yes, Private Kitchen...	NYC 15/15 Rental Subsidy*
⋮	NYC 15/15 AD	[]	[]	Studio	Unit-Online	Private Bathroom-Yes, Private Kitchen...	NYC 15/15 Rental Subsidy*
⋮	NYC 15/15 AD	[]	[]	Studio	Unit-Occupied	Private Bathroom-Yes, Private Kitchen...	NYC 15/15 Rental Subsidy*

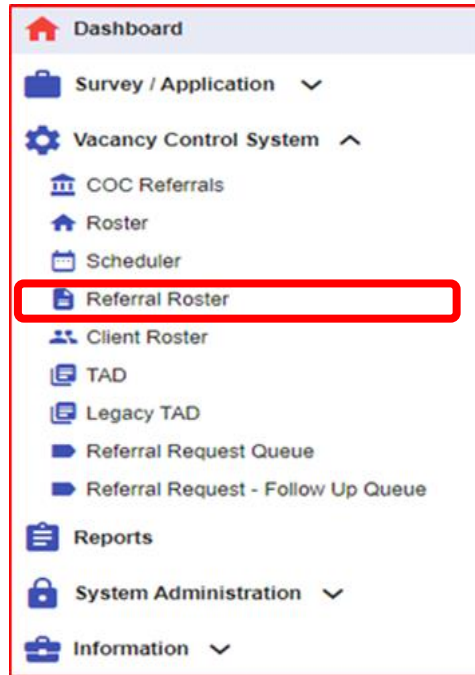
Roster [75/75]

Units Created / # Units Contracted

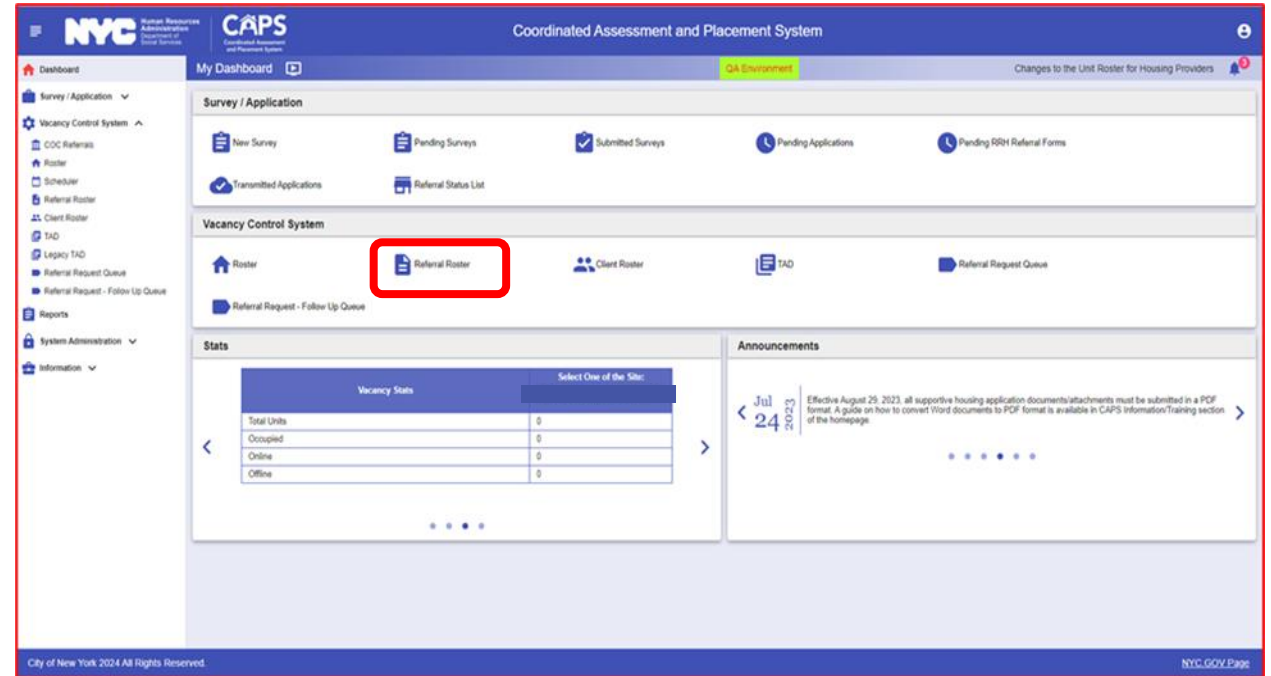
2.3

Rosters – Referral Roster

- Users can access Referral Roster by going to Dashboard > VCS > **Referral Roster**.



or





2.3

Rosters – Referral Roster

- For referrals with statuses “**Pending**”, the referral becomes overdue if no updates **14 days** from the interview date or referral date
- **After 6 months** between interview date and current date and no provider updates in between, the status of the referral is updated to “**Administratively Closed.**”
- For referrals with expired applications (**180+ days** since approval to today), the status of the referral is updated to “**Administratively Closed.**”
- After a referral’s status changes to “**Overdue**”, it stays there until further action is taken or until the application expires. This will **prevent providers from submitting monthly TADs**, you must update the referral outcome to submit your TAD.
- If same **client has multiple pending referrals** and if one of the referrals gets “**Move In Verified**,” remaining referrals status changes to “**Client Accepted Alternate Housing.**”

2.3

Rosters – Referral Roster

1. **Select a site** from the drop-down menu or **select All** to view referrals for all sites.
 - Refer to the **Key Stats Bar** for any Pending, Overdue or In Progress referrals that need to be updated.
 - **Overdue** items will display in red.

Referral Roster QA Environment NYC 15/15 Research Consents 2

Agency: Site: X Q

Key Stats Bar → Pending: 2 Overdue: 0 Accepted/Pending Move In: 0 In Progress: 0 Move-In: 0 Not Accepted: 0

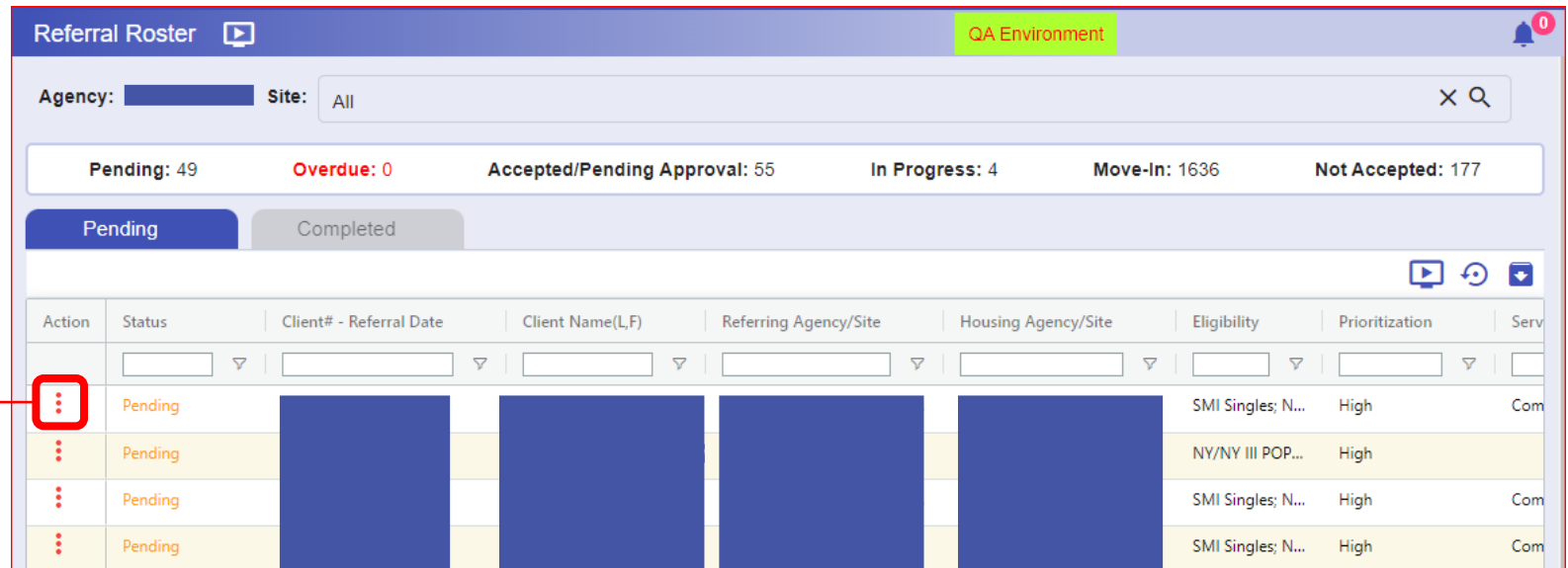
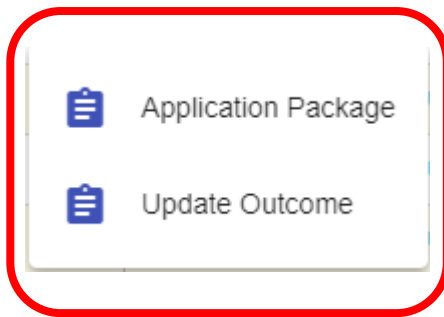
Pending Completed Re-Rental Referrals

Action	Status	Referral Type	Placement Entity	Is Swapped Referral (V/N)	Client# - Referral Date	Client Name(L,F)	Referring Agency/Site	Provider Agency/Site	Eligibility	Prioritization	Service Needs	Placement Criteria
⋮	Pending		OSAHS	N					SMI Singles; N...	High	Community Care; L...	[Borough Preferences
⋮	Pending		OSAHS	N					SMI Singles; N...	High	Level II	[Borough Preferences

2.3

Rosters – Referral Roster

- From the **Actions** column, the following options are available for each client: **Application Package**, **Update Outcome**, and **Update Interview Details**.



Action	Status	Client# - Referral Date	Client Name(L,F)	Referring Agency/Site	Housing Agency/Site	Eligibility	Prioritization	Serv
⋮	Pending					SMI Singles; N...	High	Com
⋮	Pending					NY/NY III POP...	High	
⋮	Pending					SMI Singles; N...	High	Com
⋮	Pending					SMI Singles; N...	High	Com

2.3

Rosters – Referral Roster

- When **Update Outcome** is selected, the Interview Outcomes page will open, which defaults to displaying **Client, Referral, and Housing Agency/Site Details** open at the top of the screen.

The screenshot illustrates the 'Update Outcome' process. On the left, a menu shows 'Application Package' and 'Update Outcome', with 'Update Outcome' highlighted by a red box. A red arrow points from this button to the 'Interview Outcome' page. The page title is 'Interview Outcome' and it is in a 'QA Environment'. The page is divided into three main sections, each with a blue header and a red border: 'Client Details', 'Referral Details', and 'Housing Agency/Site Details'. The 'Client Details' section includes fields for First Name, Last Name, SSN, HRA Client ID, and DOB. The 'Referral Details' section includes Referring Agency, Referral Date, Prioritization, Referred By / Date, Eligibility, Placement Criteria, and Service Needs. The 'Housing Agency/Site Details' section includes Agency Name, Site Address, Site Name, and Primary Service Contract Type. Below these sections are tabs for 'Interview Outcomes' and 'Documents'. The 'Interview Outcomes' tab is active and contains a text area with instructions: 'Please complete the outcome for the referral transmitted to your housing program. Note: HRA is required by Local Law 3 of 2022 to annually report responses entered on referrals made in CAPS.' Below the text area are fields for 'Interview Date' (MM/DD/YYYY), 'Interview Time' (Select), 'Interview Location', and 'Was Interview Conducted' (Select). At the bottom right are 'Transmit' and 'Exit' buttons.

2.3

Rosters – Referral Roster

4. In the section below those details, you have two tabs to complete: **Interview Outcomes** and **Documents**.
 - In the **Interview Outcomes** tab, you can enter data for Interview Date, Interview Time, Interview Location, and Was Interview Conducted, and subsequent respective fields that will appear.
 - In the **Documents** tab, you can attach any documents required for move-in. You may also view documents attached as part of the referral. Attaching new documents is optional/not required.

The screenshot displays a web application interface for a Referral Roster. The interface is divided into several sections:

- Client Details:** Includes fields for First Name, Last Name, SSN, HRA Client ID, and DOB.
- Referral Details:** Includes fields for Referring Agency, Referral Date, Prioritization, and Referred By / Date. It also displays eligibility criteria and placement criteria.
- Housing Agency/Site Details:** Includes fields for Agency Name, Site Address, Site Name, and Primary Service Contract Type.
- Interview Outcome Tab:** This tab is highlighted with a red box. It contains a form for entering interview data, including:
 - Interview Date (MM/DD/YYYY)
 - Interview Time (Select)
 - Interview Location
 - Was Interview Conducted (Select)
- Documents Tab:** This tab is also highlighted with a red box.

A red arrow points from the 'Interview Outcome' tab to the 'Interview Outcomes' section of the form. The form also includes a 'Transmit' button and an 'Exit' button at the bottom right.

2.3

Rosters – Referral Roster

- For Interview Outcomes, if **Interview Conducted = Yes**, a drop-down to select an **Interview Outcome** will appear below.
- Depending on the Interview Outcome (**Accepted**, **Pending Approval**, **Client did not accept housing**, or **Housing provider did not accept client**) selected, subsequent fields to fill out will appear below.
 - All fields in **red** for the Interview Outcome options are **mandatory** and cannot be left blank before clicking **Transmit**.

The screenshot displays the 'Interview Outcomes' form. The form includes fields for 'Interview Date' (MM/DD/YYYY), 'Interview Time' (Select), and 'Interview Location'. Below these, there are two dropdown menus: 'Was Interview Conducted' (set to 'Yes') and 'Interview Outcome' (set to 'Select'). A red box highlights the 'Interview Outcome' dropdown, and a red arrow points to a larger dropdown menu on the right. This menu lists the following options: 'Select', 'Accepted', 'Accepted - Pending Management Approval', 'Client did not accept housing', and 'Housing provider did not accept client'. At the bottom of the form, the 'Transmit' button is highlighted in red.



2.3

Rosters – Referral Roster

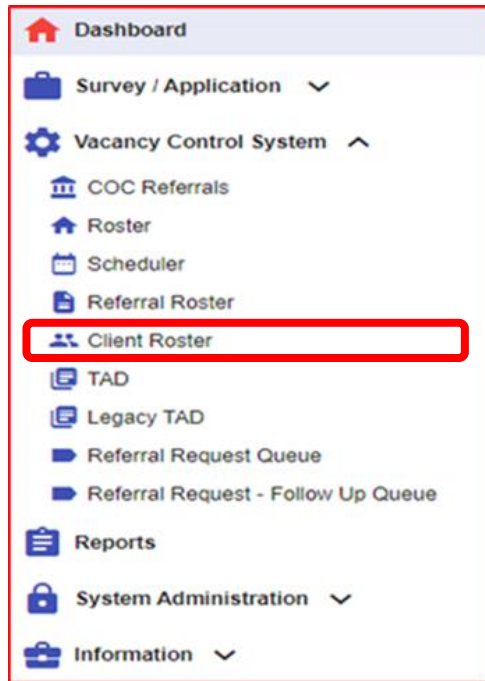
7. Once you have updated all Pending and Overdue referrals for a site, you have **completed your Referral Roster.**



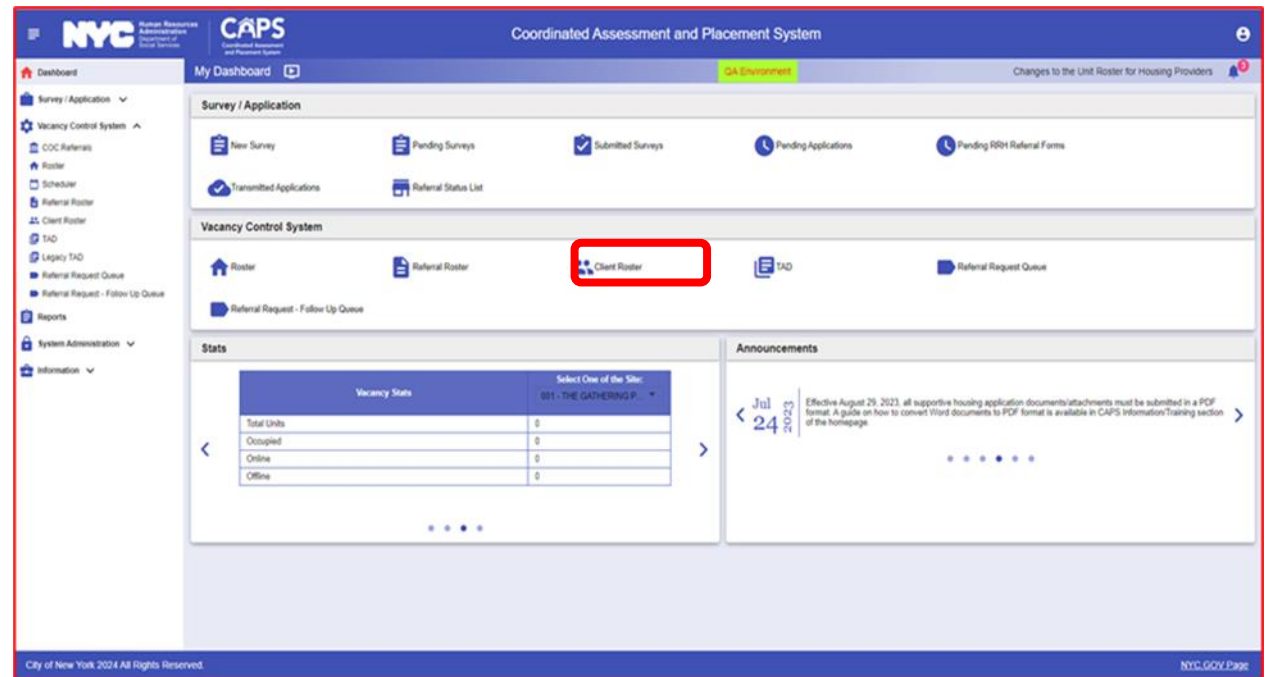
2.3

Rosters – Client Roster

- Users can access Client Roster by going to Dashboard > VCS > **Client Roster**.



or



2.3

Rosters – Client Roster

1. Select a site from the drop-down menu.

- Refer to the **Key Stats Bar** for the Total Units, Occupied, Online, Offline, Pending Move-Ins, and Pending Move-Outs, that need to be updated.
- Overdue items will display in **red**.
- Clients listed in **orange** need to be assigned to a unit.

Key Stats Bar →

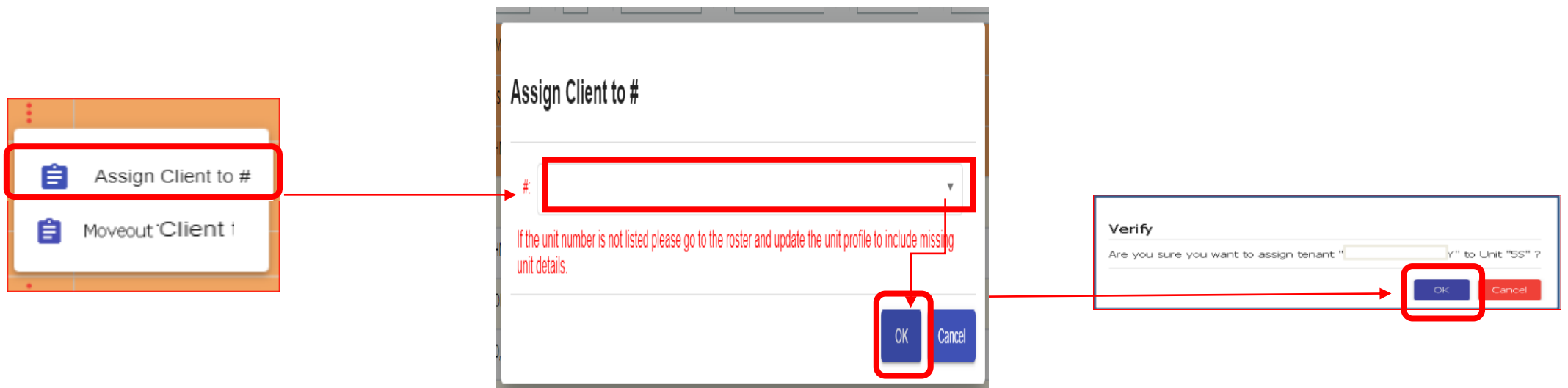
The screenshot displays the 'Client Roster' interface. At the top, there is a header bar with 'Client Roster' and 'QA Environment'. Below this is a search bar for 'Agency: 2'. A red box highlights the 'Key Stats Bar' which contains the following information: Total Units: 72, Occupied: 63, Online: 7, Offline: 2, Pending Move-Ins: 3, and Pending Move-Outs: 1. Below the stats bar are tabs for 'My Clients' and 'Transmitted'. The main area is a table with columns: Action, Client# - ReferralDate, Client Name (L,F), Name, Status, Primary Service Contract, Rental Subsidies, Client Voucher, Referring Agency/Site, Client Eligibility, Prioritization, and Entry. The table contains several rows, with some highlighted in orange. At the bottom, there is a pagination bar showing '1 to 10 of 75' and 'Page 1 of 8'.

Action	Client# - ReferralDate	Client Name (L,F)	Name	Status	Primary Service Contract	Rental Subsidies	Client Voucher	Referring Agency/Site	Client Eligibility	Prioritization	Entry
	04/09/2014										08/2
	03/20/2012										05/1
	05/14/2024										05/1
			UNIT-1P	Unit-Online	SMI - Singles	HPD-HUD COC Renta...					
	22468 - 07/22/2024	DOE, JOHN	UNIT-1Q	Unit-Online	SMI - Singles	HPD-HUD COC Renta...					07/2
	220969 - 07/24/2017	MORRISON, ANNETTE	UNIT-1R	Unit-Occupied	SMI - Singles	HPD-HUD COC Renta...		1319 - HASA / 073 - BROW...	NY/NY III POP H; SM...		10/2
	8024 - 04/20/2022	ACEVEDO, DAVID	UNIT-1S	Unit-Occupied	SMI - Singles	HPD-HUD COC Renta...					09/1
			UNIT-1T	Unit-Online	SMI - Singles	HPD-HUD COC Renta...					
			UNIT-1U	Unit-Online	SMI - Singles	HPD-HUD COC Renta...					
	165704 - 07/17/2012	EDMONDSON, LUKE	UNIT-1V	Unit-Occupied	SMI - Singles	HPD-HUD COC Renta...					12/2

2.3

Rosters – Client Roster

- From the **Actions** column, the following options are available for orange-listed clients: **Assign Client to #** or **Move out Client**.
- When **Assign Client to #** is selected, a pop-up will appear, from which you will **choose the correct #** and press **OK** to save.
 - The system reminds you that if the unit number you are looking for is not listed, you may need to update the roster to include the missing unit details.
- Press **OK** to verify or **Cancel** to make changes.





2.3

Rosters – Client Roster

6. Upon verification, the Client moves from their position at the top of the list, and the orange highlight disappears to show that this individual has been assigned to a unit.
7. Continue until all awaiting (orange) clients have been assigned to their units, and then you have **completed your Client Roster.**




- Note: The client you just assigned will move from the top of the list in orange, to the last occupied unit on the list, which may be several screens away.
 - Locate the client you just assigned to the unit by using the scroll bar on the bottom of the chart.
 - Alternatively, use the filter function in the Name column to locate the client.

2.3

Rosters – Client Roster









- For Online Units, you can move a client in using Client Entry from the Action buttons
- Users now have the option to search for a client's approved supportive housing application and move them into a site using demographic information or the application details


Client Roster 

Agency: Site:

Total Units: 97 Occupied: 0

My Clients Transmitted

Action	Client# - ReferralDate	Client Name (L,F)	Name
	<input type="text"/>	<input type="text"/>	<input type="text"/>
 Client Entry			UNIT-1A
			UNIT-1Q
			UNIT-2H
			UNIT-1S
			UNIT-1C
			UNIT-2G
			UNIT-3F
			UNIT-3G
			UNIT-4F
			UNIT-5F

Add Tenant QA Environment NYC 15/15 Research Consents 

Agency Name: Site Name: Unit#: UNIT-1A Primary Service Contract Type

Client Search

Please select one of below radio buttons to start an application match on the client in order to move into Tenant Roster.

Search by client demographics Search by application details

2.3

Rosters – Client Roster

- If you do not know the HRA ID or Referral date, select search by Demographic information
- You need to enter the client's First Name, Last Name, Date of Birth, Social Security Number or CIN/ Medicaid # and Gender
- If you search by Application Details you need to enter the client's First Name, Last Name, HRA ID and Referral Date
- This information can be found at the top of the supportive housing determination Letter.

The screenshot shows the 'Add Tenant' form in a QA Environment. The form has a header with 'Add Tenant' and 'QA Environment'. Below the header are fields for 'Agency Name:', 'Site Name:', 'Unit#:', and 'Primary Service Contract Type:'. A 'Client Search' tab is active. A message reads: 'Please select one of below radio buttons to start an application match on the client in order to move into Tenant Roster.' Two radio buttons are present: 'Search by client demographics' (which is selected and highlighted with a red box) and 'Search by application details'. Below the radio buttons are input fields for 'Client First Name:', 'Client Last Name:', 'SSN:', 'DOB:' (with a calendar icon), 'Gender:', and 'CIN/Medicaid:'. At the bottom right are 'Search' and 'Exit' buttons.

The screenshot shows the 'Add Tenant' form in a QA Environment. The form has a header with 'Add Tenant' and 'QA Environment'. Below the header are fields for 'Agency Name:', 'Site Name:', 'Unit#:', and 'Primary Service Contract Type:'. A 'Client Search' tab is active. A message reads: 'Please select one of below radio buttons to start an application match on the client in order to move into Tenant Roster.' Two radio buttons are present: 'Search by client demographics' and 'Search by application details' (which is selected and highlighted with a red box). Below the radio buttons are input fields for 'Client First Name:', 'Client Last Name:', 'HRA Client ID:', and 'Referral Date:' (with a calendar icon). At the bottom right are 'Search' and 'Exit' buttons.

2.3

Rosters – Client Roster

- Once you make your selection and click search you will be redirected to the Approved Application page.
- On the approved applications [age, CAPS will list all the approved applications (both active and expired) for this client.
- Identify the application you want to move the client in with and select the box next to the application and click proceed. You should select the application that is Active and Eligible for your unit. If there is no Active Eligible application, please select the most recent approved application that is eligible for your unit. For any questions on which application to select, please reach out to your TAD liaison.

The screenshot displays the 'Approved Applications' page in the UAT Environment. The page title is 'Approved Applications' and the environment is 'UAT Environment'. The page is for 'NYC 15/15 Research Consents' and has 3 notifications. The table below shows the application details:

Select	Action	Referral Date	Referring Agency/site#	Eligibility
<input type="checkbox"/>	⋮	02/21/2024	1008 - BRONX STATE PSYCHIATRIC CENTER / 001 - INPATIENT	SMI Singles; NY/NY I & II; NY/NY III POP A; NYC 15/15 AD;

At the bottom of the page, there are three buttons: 'Start New Search', 'Proceed' (highlighted with a red box), and 'Exit'. The 'Proceed' button is the one to click after selecting an application.

2.3

Rosters – Client Roster

- After selecting the application, you are then directed to the Interview Outcomes page and required to enter the move in details.
- CAPS requires you to answer the interview questions highlighted in red. Once completed click, transmit.

Interview Outcome
QA Environment
NYC 15/15 Research Consents 2

[Hide Details](#)

Client Details:

First Name: CARMINE	Last Name: TROTTO	SSN: XXX-XX-8818	HRA Client ID: 128083	DOB: 07/14/1954
---------------------	-------------------	------------------	-----------------------	-----------------

Referral Details:

Referring Agency: 1087 - BLACK VETERANS FOR SOCIAL JUSTICE / 557 - Amado	Eligibility: SMI Singles; NY/NY I & II; NY/NY III POP A; ESSHI MH-AD
Referral Date: 01/05/2024	Placement Criteria: [Borough Preferences]: No Preference; No Preference; Manhattan; [Apartment Preferences]: 1st floor apartment;
Prioritization: SVA - High	Service Needs: Community Care; Level II

Provider Agency/Site Details:

Agency Name: 2005 - CAMBA	Site Name: 788 - BRONX GROVE 203
Primary Service Contract Type: ESSHI - MH-AD	

Move-In Details | Documents

Please complete the outcome for the referral transmitted to your housing program.
Note: HRA is required by Local Law 3 of 2022 to annually report responses entered on referrals made in CAPS.

Was Interview Conducted:	Select
Referral Received From:	Select
Referral Received Date:	MM/DD/YYYY 📅
Interview Date:	MM/DD/YYYY 📅
Move In Date:	MM/DD/YYYY 📅
Rent/Client Contribution:	<input type="text"/>
Income Source:	Select
Comments:	<input type="text" value="Enter Comments here..."/>

(Maximum entry of 750 characters; 750 characters remaining)

Transmit
Exit



2.3

Rosters – Client Roster

- If a tenant has an active pending referral with your agency, you will be blocked from moving the tenant in through the tenant roster.
- You will receive a pop-up blocker to update the interview outcome in your referral roster.

Alert

The client has referral(s) pending a definite outcome with your site. Please go to Referral Roster and Update the interview outcome to move in this client.

OK

- If a tenant has an active pending referral with another housing provider, you will be blocked from moving the tenant in through the tenant roster.
- You will receive a pop-up blocker to contact your TAD Liaison for assistance

Alert

The client has referral(s) pending a definite outcome with another Agency/Site. Please contact your TAD Liaison for any assistance.

Email: ruffc@hra.nyc.gov

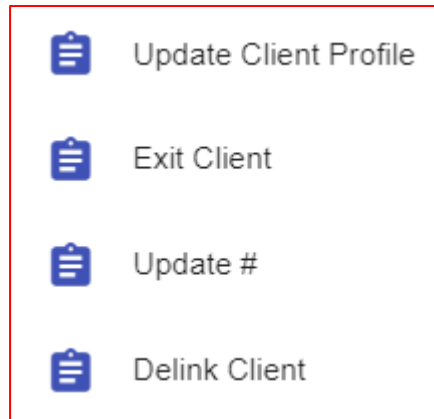
OK



2.3

Rosters – Client Roster

- For Occupied Units, you can: Update the Client Profile, including client rent contribution; Exit the client out; update the unit number (if you are swapping 2 units); or delink the Client.



- Delinking the client removes them from the unit, but they remain on the client roster. If you need to correct any unit information, or if you need to move the same client in but using their HRA ID, delinking is the first step.



2.4

TADs

- [Selecting the TAD](#)
- [Resolving the Roster](#)
- [Resolving the Referral Roster](#)
- [Resolving the Client Roster](#)
- [Submitting the TAD](#)



2.4

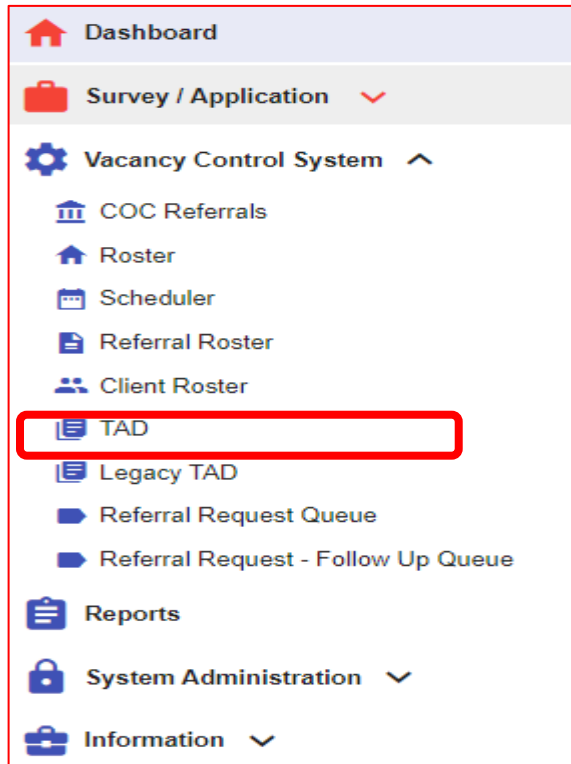
TADs

- **Turn Around Documents (TADS)** are reporting documents, submitted to HRA, which track occupancy in supportive housing programs.
- They are due by the **5th day of the month for SRO-contracted programs**, and the **10th day for all other programs**
- When submitting TADS there are **3 components to complete**:
 - **Roster**
 - **Referral Roster**
 - **Client Roster**

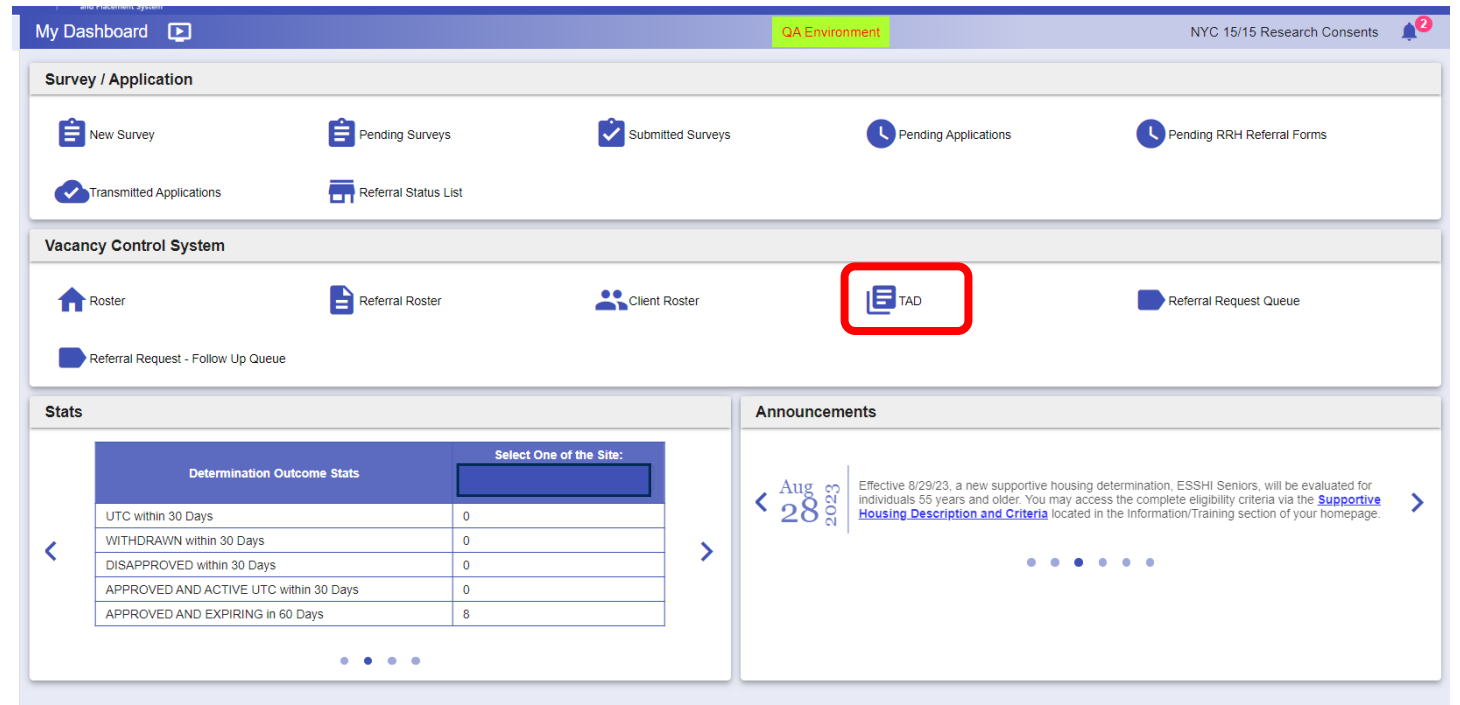
2.4

TADs

- Users can access and complete TADs by going to Dashboard > VCS > **TAD**.
 - You will be routed to the **TAD Submission** screen.



or



2.4

TADs – Selecting the TAD

1. In TAD Submission, **select the site** for which you are completing the TAD, **or select All**.
 - The **Key Stats Bar** indicates what TADs you have in your queue.
 - Pending TADs are made up of TADs with the status = Not Submitted + In Progress.
 - Each stat has a tally that reflects the chart below it.

Key Stats Bar →

TAD Submission QA Environment

Agency Name: [Redacted] Site Name: All

Key Stats Bar: NotSubmitted(Overdue): 8 In Progress: 2 Pending Verification: 0 Verified: 647

TAD Submission Table:

Action	Site No/Site Name	Reporting Month	Reporting Year	Updated By	Updated Date	Status
⋮	[Redacted]	April	2022	[Redacted]	10/12/2022	In-Progress
⋮	[Redacted]	May	2022			Overdue
⋮	[Redacted]	June	2022			Overdue
⋮	[Redacted]	July	2022			Overdue
⋮	[Redacted]	August	2022			Overdue

2.4

TADs – Selecting the TAD

2. Click the 3 red dots/**Action** button next to a site and select **Submit TAD**

The screenshot displays the 'TAD Submission' interface in a 'QA Environment'. At the top, there are search fields for 'Agency Name' and 'Site Name' (set to 'All'). Below these are summary statistics: 'NotSubmitted(Overdue): 8', 'In Progress: 2', 'Pending Verification: 0', and 'Verified: 647'. The interface has two tabs: 'Pending' (selected) and 'Transmitted'. A table lists TADs with columns for 'Action', 'Site No/Site Name', 'Reporting Month', 'Reporting Year', 'Updated By', 'Updated Date', and 'Status'. The first row is highlighted in blue and has a red box around its 'Action' column, which contains three red dots. A red callout box labeled 'Submit TAD' points to these dots. The table shows one 'In-Progress' TAD for April 2022 and seven 'Overdue' TADs for May, June, July, and August 2022, and three 'Not Submitted' TADs for September 2022.

Action	Site No/Site Name	Reporting Month	Reporting Year	Updated By	Updated Date	Status
⋮		April	2022		10/12/2022	In-Progress
⋮		May	2022			Overdue
⋮		June	2022			Overdue
⋮		July	2022			Overdue
⋮		August	2022			Overdue
⋮		September	2022			Not Submitted
⋮		September	2022			Not Submitted
⋮		September	2022			Not Submitted
⋮		September	2022			Not Submitted

2.4

TADs – Resolving the Roster

3. The **missing information** for each TAD is indicated in **red**.
 - **All missing information must be resolved** before continuing in the TAD submission process.

4. Any **incomplete units** (missing details) will appear **on the roster highlighted in orange**.

Dashboard

TAD Reports
(month) 2022

- Unit Roster
- Referral Roster
- Tenant Roster
- TAD

Pending Task for TAD Submission

Agency Name: [redacted] Site Name: [redacted] Site Address: [redacted]

Unit Roster [5/34]

Unit Roster: 1 Field(s) Requiring Entry or Correction

- **Unit Count Mismatch:** The count of units entered do not match with the total count of units defined for the contract. Refer to 'Agency Site Profile ->Site Profile tab' for additional information.

Unit Name Unit features Primary Service Contract

Contracting Agency Rental Subsidies

Unit Status

Unit Type

Add Clear

Actions	Primary Service ...	Contracting Age...	Unit Name	Unit Type	Unit Status	Unit Features	Rental Subsidies
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

2.4

TADs – Resolving the Roster

- Click the 3 red dots/**Action** button and select **Edit**.
 - Scroll back to the top part of the screen, fill in the fields with the missing information, and **Save** before proceeding with anything else.

The screenshot shows the 'TAD Reports' dashboard for the month of 2022. The 'Unit Roster' option is highlighted. Below the dashboard is a table of units with columns for Actions, Primary Service, Contracting Age, Unit Name, Unit Type, Unit Status, Unit Features, and Rental Subsidies. A red box highlights the three red dots in the 'Actions' column of the first row. A red arrow points from this box to a 'Edit Unit' button in a separate window. Below the 'Edit Unit' button is a 'Delete Unit' button. A red arrow points from the 'Edit Unit' button to a 'Save' button, which is highlighted with a red box. To the right of the 'Save' button is a 'Clear' button.

Actions	Primary Service ...	Contracting Age...	Unit Name	Unit Type	Unit Status	Unit Features	Rental Subsidies
⋮	ESSHI :: MH-FA	OMH	TEST	Two-Bedroom	Unit-Online	Wheelchair accessible u...	NONE
⋮	ESSHI :: SUD-FA	OMH	TEST	Two-Bedroom	Unit-Online	Wheelchair accessible u...	NONE
⋮	NV/NY III :: POP D	OMH	TEST	Two-Bedroom	Unit-Online	Wheelchair accessible u...	NONE
⋮	NV/NY III :: POP G	OMH	TEST	Two-Bedroom	Unit-Online	Private Bathroom-Yes ,P...	NONE
⋮	ESSHI :: MH-AD	OMH	TEST	Studio	Unit-Online	Wheelchair accessible u...	ESSHI



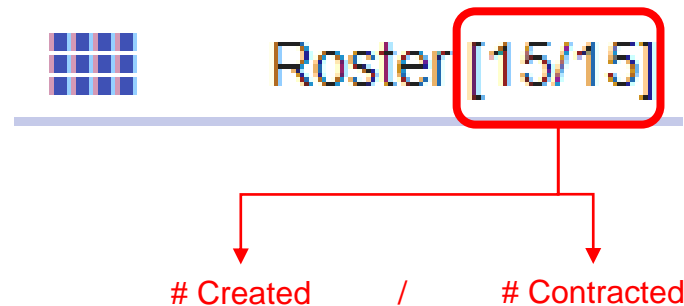
2.4

TADs – Resolving the Roster

Roster: 1 Field(s) Requiring Entry or Correction

- **Unit Count Mismatch:** The count of units entered do not match with the total count of units defined for the contract. Refer to 'Agency Site Profile ->Site Profile tab' for additional information.

- Note: **All contracted units must be created in the CAPS Roster to allow for TAD submission.**
 - An **error** will pop up and prevent you from submitting a TAD if the Roster is incomplete.
 - Incomplete Rosters do not have all contracted units created in CAPS.
 - To **resolve** this error and allow TAD submission, go to your site's Roster and **add all contracted units**.
 - **When Unit Count Mismatch is resolved, the Roster Counter will show the (# of Units Created) equals (# of Units Contracted).**



Ready to proceed to next section

2.4

TADs – Resolving the Referral Roster

7. Click the 3 red dots/**Action** button to enter necessary information for that row.
 - Select **Update Outcome** from the action menu.
8. Complete all required fields and press **Transmit**.
9. Once you transmit, the Key Stats Bar updates with the correct number overdue remaining. Once you complete all required information, you will be directed to resolve the Client Roster.



Ready to proceed to next section

- The **Key Stats Bar** at the top of the TAD Referral Roster indicates critical site information.
- The validation message in **red** summarizes what is due.
- Each row of the chart **highlighted in orange** must be completed.

Key Stats Bar

Total Units: 0	Occupied: 0	Online: 0	Offline: 0	Pending Move-Ins: 0	Pending Move-Outs: 0
----------------	-------------	-----------	------------	---------------------	----------------------

[Dashboard](#)

TAD Reports

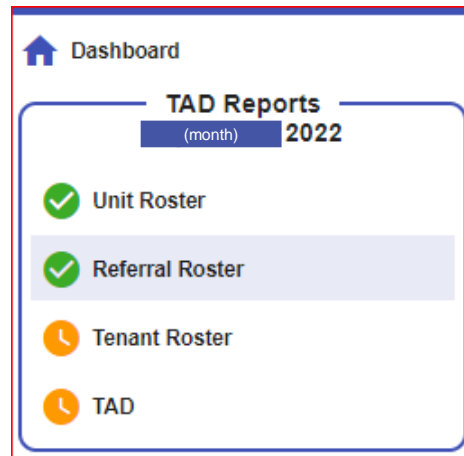
(month) 2022

- ✓ Unit Roster
- ✓ Referral Roster
- 🕒 Tenant Roster
- 🕒 TAD

2.4

TADs – Resolving the Client Roster

10. Resolve all **orange-listed clients** in the **Client Roster** by clicking the 3 red dots/**Action** button and select **Assign Client to #**.
11. A pop-up will appear, from which you will **choose the correct unit for the identified client and press OK** to save.
 - Note: For **Congregate Sites** enter the unit's name as it appears in your building. For **Scatter Sites** you may designate 'to be provided' and update later, once the unit is identified.
 - You will be prompted to verify the choice you've made. Press **OK** to verify or Cancel to change it.





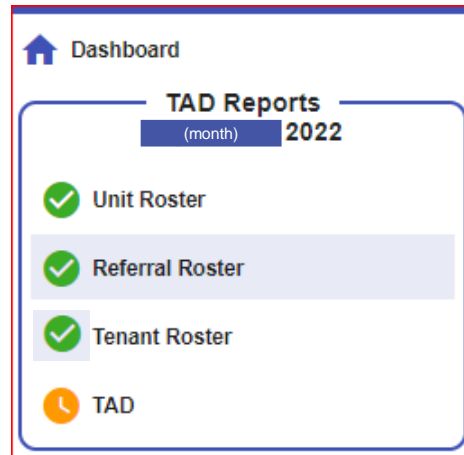
2.4

TADs – Resolving the Client Roster

12. **Continue until all clients are assigned** to their appropriate units.
13. Once your client roster is complete, it will have a **green check mark** beside it in the left navigational menu.
14. You may now submit your TAD.



Ready to proceed to next section





2.4

TADs – Submitting the TAD

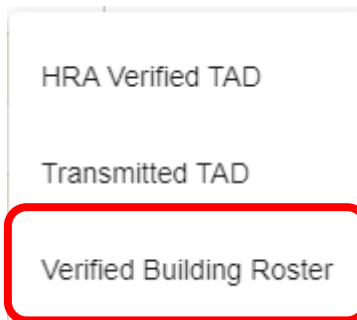
15. With the client roster complete, you are ready to submit your TAD: Select TAD from the left-hand navigational menu. **Scroll to the bottom of the screen to find the verification statement. Check the box to verify.**
16. When you check the box, the **Submit** button appears. **Click** it to complete your TAD submission.
17. The verification message will display, indicating the status on missing information. **Click Yes to submit the TAD or** cancel to continue completing the rosters.
18. Selecting Yes triggers one last pop-up verification alert.
19. Click **OK**. The green message that you have **submitted your TAD successfully** appears in the top-right corner of your screen.
20. Returning to the TAD main page, you can view all of your submitted TADS by clicking the Transmitted tab on the screen.



2.4

TADs – Submitting the TAD

- Once a TAD has been transmitted, you can see it in the Transmitted tab.
- TADS awaiting verification by the Coordinated Entry team will appear in the Pending Verification spot in the key stats bar.
- Once they have been verified by the Coordinated Entry Team, they will appear in the Verified spot on the key stats bar
- Note: Your verified TAD becomes your **Verified Building Roster Report**
- This report can only be accessed through the Transmitted Tad tab





2.5

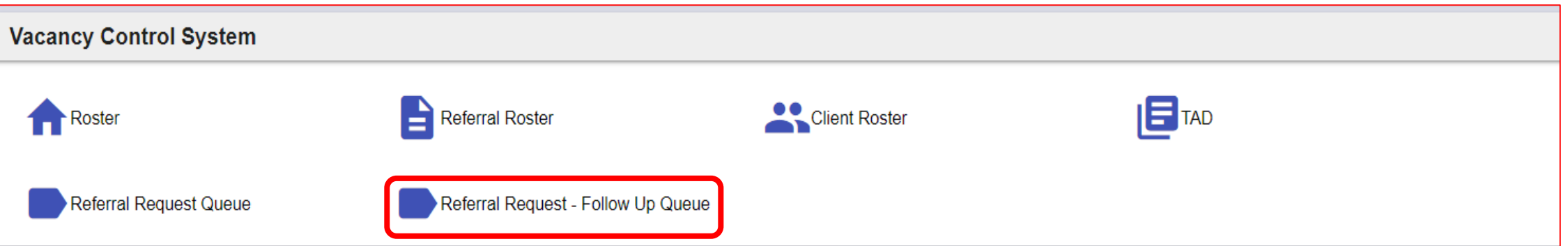
Referral Request Queue (RRQ)




2.5


Referral Request Queue (RRQ)


- The Referral Request Queue (RRQ) function went live on 11/01/22.
- RRQ is for **re-rentals only**.
- HRA Office of Supportive/Affordable Housing and Services (**OSAHS**) is the **only placement agency utilizing RRQ**
- The RRQ function is a workflow to **track referral requests from Housing Providers** (HP's) but there is still a need for staff contact to effectively execute on the entire placement process.
- Housing providers can track their requests, and the status, in their **Referral Request Queue on the Dashboard**
- Housing Providers must update the referral outcomes within **TWO business days of the interview**





Vacancy Control System


 Roster


 Referral Roster

 Client Roster

 TAD

 Referral Request Queue

 Referral Request - Follow Up Queue



2.5

Referral Request Queue (RRQ)

- **Before you begin:**
 - Ensure your Roster information is correct in CAPS. All move ins and outs must be current in CAPS.
 - Ensure Unit Details – both service contract eligibility and rental subsidy – for the unit you will be requesting a referral are correct.
 - NOTE: If HPs need to make any corrections to the roster or specific unit, these must be corrected/coordinated with HRA Coordinated Entry before requesting a referral.
 - NOTE: Currently, only OSAHS has RRQ functionality in CAPS. For referrals from other Placement Entities, please follow the instructions in the pop-up window on how to contact HRA HASA, NYC ACS or CUCS

2.5

Referral Request Queue (RRQ) – Requesting a Referral

1. Go to VCS → **Roster** to Request a Referral.
2. Click the 3 red dots button/**Action** button next to an **ONLINE** unit.
3. Select **Request Referral** from Action drop down.

The screenshot displays the VCS Roster interface. At the top, there is a navigation bar with 'Roster' and 'QA Environment' tabs. Below this, there are search filters for 'Site Name', 'Site Address', and 'Primary Service Contract'. The main area shows a form for adding or editing units, with fields for 'Name', 'Features', 'Contracting Agency', 'Rental Subsidies', 'Status', and 'Type'. At the bottom, there is a table listing units. A red box highlights the 'Request Referral' option in the action menu for a unit with status 'Unit-Online'. A callout box on the right shows 'Unit Status = Unit-Online'.

Service A...	Contracting Agency	Name	Type	Status	Features	Subsidies
DOHMH	DOHMH	UNIT-2Y	Studio	Unit-Online	Private Bathroom-Yes, Priv...	Section 8 - HPD
NYC 15/15 AD	DOHMH	UNIT-3X	Studio	Unit-Online	Private Bathroom-Yes, Priv...	Section 8 - HPD

2.5

Referral Request Queue (RRQ) – Requesting a Referral

3. Complete the **Referral Request Form**

Referral Request

- Referral Request information is populated from the Roster
- All fields in red are required
- Ensure the contact information is correct
- Only use the additional requirements section to communicate mandatory referral factors not captured elsewhere (not preferences)
- Contact person listed in the Request Referral form must be able to schedule the interview
- HOUSING PROVIDER Verifies & Transmits.
- OSAHS staff will confirm the interview dates within one (1) business day of HP's request.

4. Click **Verify & Transmit**, which sends the Referral Request form to OSAHS Vacancy team.



Interview Contact Information:

Name of the Contact for Interview:

Phone:

Extension:

Email:

Are there any additional contract requirements for this unit? Yes No

Additional Contract Requir...	Updated By / Date / Time
No Rows To Show	

0 to 0 of 0 < < Page 0 of 0 > >

Verify & Transmit Exit

2.5

Referral Request Queue (RRQ) – Transmitted Tab

- The **Transmitted** tab tracks the forms **submitted** to OSAHS.
- If you make a request in error, click the 3 red dots/Action button next to the referral, and you can **withdraw** the form if in transmitted queue and OSAHS has NOT started to process your request.
 - However, if OSAHS has already assigned the request to staff, you will not be able to withdraw the request. The Withdraw option will be greyed out and providers will need to contact OSAHS to cancel the request.

The screenshot displays the 'Referral Request Queue' interface in a 'QA Environment'. The 'Transmitted' tab is selected, showing a list of referral requests. A red box highlights the 'Transmitted' tab, and another red box highlights the 'Withdraw Referral Request' option in the dropdown menu for a specific request.

Action	Transmitted Date	Agency No / Agency Name	Site No / Site Name	Site Address	Primary Service Contract	Rental Subsidies	Unit Name	Unit Type	Wheelchair Accessible	HUD Chronic	Site
⋮	12/06/2022	[Redacted]	[Redacted]	[Redacted]	SMI Singles	HPD-HUD COC Renta...	2K	SRO Suites-Ind...	No	Yes	Conc
⋮	12/08/2022	[Redacted]	[Redacted]	[Redacted]	SMI Singles	Section 8 - HPD	2C	SRO Suites-Ind...	No	No	Conc
⋮	12/05/2022	[Redacted]	[Redacted]	[Redacted]	SMI Singles	HPD-HUD COC Renta...	1W	SRO Suites-Ind...	No	Yes	Conc

1 to 3 of 3 | Page 1 of 1



2.5

Referral Request Queue (RRQ) – HRA Scheduling in Re-Rental Scheduler

- The following information will be requested to schedule each interview/apt viewing:
 - Dates for interview
 - Times for interview
 - Interview type (In person or remote)
 - If in person- location address
 - Name of interviewer
 - Email of contact
 - Phone number of contact (for day-of-interview contact)
 - If remote, platform and link
 - Or Dial-In Number
- **Note:** HRA needs 5 business days from the date we receive the above information to schedule candidates for interviews. OSAHS staff will confirm available dates and times with Housing Provider during scheduling time.

2.5

Referral Request Queue (RRQ) – Pending Tab

- Requests move to the **Pending** tab when the interview **scheduling has been** completed by OSAHS.
- The Interview Slots column in the Pending tab will have the date and times you have selected CAPS and have been confirmed by OSAHS .

Referral Request Queue

QA Environment

Agency: A Site: All

Pending Schedule: 0 Scheduled: 1 Withdrawn Requests: 0 Cancelled Requests: 0 Referrals Completed: 0

Transmitted Pending Completed

Action	Transmitted Date	Agency No / Agency Name	Site No / Site Name	Site Address	Primary Service Contract	Rental Subsidies	Unit Name	Unit Type	Wi
	mm / dd / yyyy								
	11/22/2022					Section 8 - HPD	3M	One-Bedroom	No

1 to 1 of 1 Page 1 of 1

Scroll to far-right to view & search Interview Slots column

Interview Slots

2.5

Referral Request Queue (RRQ) – Completed Tab

- Requests move to the **Completed** tab when **eligible applicants have been transmitted by OSAHS to you**
- Referrals will be found in your **Referral Roster**.
- You will receive a **notification email** from CAPS that referrals have been made.
 - All users assigned to the program in CAPS will receive the notification.
 - There is a reminder email notification 2 days prior to the interview date.
- The Completed tab also includes any requests that have been **withdrawn** by the HP or **canceled** by OSAHS.

The screenshot displays the 'Referral Request Queue' interface. The 'Referral Request Queue' tab is highlighted with a red box. The 'QA Environment' label is visible in the top right. Below the search bar, the status summary shows: Pending Schedule: 0, Scheduled: 0, Withdrawn Requests: 0, Cancelled Requests: 0, and Referrals Completed: 1. The 'Completed' tab is selected and highlighted with a red dashed box. The table below shows a single entry with the following data:

Action	Transmitted Date	Referral Request Status	Agency No / Agency Name	Site No / Site Name	Site Address	Primary Service Contract	Rental Subsidies	Unit Name
	11/22/2022	Referral Transmitted						Section 8 - HPD 3M

At the bottom, there is a legend for 'Cancelled / Withdrawn Referral Requests' and a pagination indicator showing '1 to 1 of 1'.



2.5

Referral Request Queue (RRQ) – Referral Email Notification

Dear User,

One or more client referrals have been made in CAPS to your agency and site. Please log into CAPS to view additional details for the referral package(s) listed below:

Client Information		Placement Agency Information		Interview Details		
HRA Client ID	Referral Date	Submitted By/Date	Placement Agency	Interview Date/Time	Contact Person	Contact Phone #
246810	10/17/2022	CAROLE EADY - 11/22/2022	OSAHS	12/05/2022 1:00PM		
13579	07/15/2022	CAROLE EADY - 11/22/2022	OSAHS	12/05/2022 10:00AM		
357911	10/04/2022	CAROLE EADY - 11/22/2022	OSAHS	12/05/2022 11:30AM		
46810	02/23/2022	CAROLE EADY - 11/22/2022	OSAHS	12/05/2022 1:00PM		

2.5

Referral Request Queue (RRQ) – Referral Roster

- The Referral roster lists all clients that are referred to your agency/program.
 - This includes all referrals that may have happened outside of RRQ.
- **Interview Outcomes must be entered in the Referral roster within 2 days of the date interview is conducted.**

The screenshot displays the 'Referral Roster' interface. At the top, there is a navigation bar with 'Referral Roster' and 'QA Environment'. Below this, a summary bar shows statistics: Pending: 33, Overdue: 21, Accepted/Pending Approval: 15, In Progress: 6, Move-In: 1672, and Not Accepted: 216. A filter dropdown is set to 'All'. The main table has columns for Action, Status, Referral Type, Client# - Referral Date, Client Name(LF), Referring Agency/Site, Housing Agency/Site, Eligibility, Prioritization, Service Needs, Placement Criteria, and Primary Service C. A callout menu is open over the 'Action' column, showing options for 'Application Package' and 'Update Outcome'. A red box highlights the 'Referral Roster' header, the 'Pending' filter, and the callout menu options.

Action	Status	Referral Type	Client# - Referral Date	Client Name(LF)	Referring Agency/Site	Housing Agency/Site	Eligibility	Prioritization	Service Needs	Placement Criteria	Primary Service C
Overdue	Overdue	Regular Referral			1245 - WOMEN IN NEED, I...	2005 - CAMBA / 783 - AUS...	NY/NY III POP...	High		[Borough Preferences]: ...	ESSHI - MH-FA
Pending	Pending	Regular Referral			1319 - HASA / 041 - GRAN...	2005 - CAMBA / 042 - CA...	SMI Singles; N...	Medium	Community Care; L...	[Borough Preferences]: ...	NY/NY III - POP H
Pending	Pending	Regular Referral			1319 - HASA / 024 - AMST...	2005 - CAMBA / 030 - LEG...	NY/NY III POP...	Medium		[Borough Preferences]: ...	NY/NY III - POP H
Pending	Pending	Regular Referral			1008 - BRONX STATE PSYC...	2005 - CAMBA / 053 - 212...	SMI Singles; N...	High	Level II; 24 Hour Su...	[Borough Preferences]: ...	ESSHI - MH-AD
Pending	Pending	Regular Referral			1319 - HASA / 073 - BROW...	2005 - CAMBA / 042 - CA...	NY/NY III POP...	Medium		[Borough Preferences]: ...	NY/NY III - POP H
		Regular Referral			1319 - HASA / 024 - AMST...	2005 - CAMBA / 042 - CA...	SMI Singles; N...	High	Community Care; L...	[Borough Preferences]: ...	NY/NY III - POP H
		Regular Referral			1319 - HASA / 051 - QUEE...	2005 - CAMBA / 042 - CA...	SMI Singles; N...	Low	Community Care; L...	[Borough Preferences]: ...	NY/NY III - POP H
		Regular Referral			1319 - HASA / 051 - QUEE...	2005 - CAMBA / 021 - MO...	SMI Singles; N...	Low	Community Care; L...	[Borough Preferences]: ...	NY/NY III - POP H
		Regular Referral			1319 - HASA / 073 - BROW...	2005 - CAMBA / 042 - CA...	SMI Singles; N...	Medium	Community Care; L...	[Borough Preferences]: ...	NY/NY III - POP H
		Regular Referral			1319 - HASA / 024 - AMST...	2005 - CAMBA / 042 - CA...	SMI Singles; N...	High	Community Care; L...	[Borough Preferences]: ...	NY/NY III - POP H

2.5

Referral Request Queue (RRQ) – Referral Roster

- **Special Notes:**

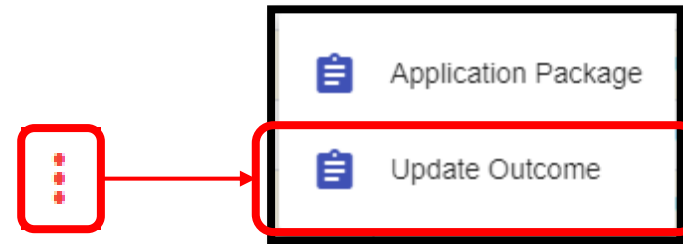
- No new referrals will be sent for this unit until outcomes are updated.
- Clients who have been referred to your building will not be able to be referred to other housing opportunities until you update the results in CAPS.

- **Entering Referral Outcomes:**

- Once interviews have been conducted, enter the outcome by selecting Update Outcome from the 3 red dots button/Action button column.

- Questions to be answered are:

- Was interview conducted?
- If so, what was the outcome?
- If Pending Management Approval, what was the reason?
- If you select Pending Management Approval – you should return to the referral to update details as they occur



2.5

Referral Request Queue (RRQ) – Referral Roster

- **Interview Outcome = Accepted - Pending Management Approval**
 - Client completed clinical intake and is accepted.
 - Client has just begun the property management/leasing process and is gathering and submitting documents.
 - Once the client receives the Acceptance Letter, update the outcome to Accepted/Pending Move In and enter the expected date.
 - **NOTE: Criminal background check and credit check will no longer be options to select in CAPS.**

Was Interview Conducted: Yes

Interview Outcome: Pending Approval

Reason
(specify details in the below Comments field)


Comments:

- Income documents
- SH Application documents
- Property Management / Leasing Interview
- Criminal background check
- Credit Check
- Unit Viewing

2.5

Referral Request Queue (RRQ) – Referral Roster

- **Interview Outcome = Accepted - Pending Move-In**
 - Once the Acceptance Letter is issued, change the status from Accepted-Pending Management Approval to Accepted-Pending Move In.
 - Expected move in date is required. If the expected move in date changes, you must update it in CAPS to avoid TAD submission errors.

Was Interview Conducted:	<input type="text" value="Yes"/>
Interview Outcome:	<input type="text" value="Accepted"/>
Placement Outcome:	<input type="text" value="Pending Move In"/>
Expected Move In-Date:	<input type="text" value="MM/DD/YYYY"/> 
Unit Number:	<input type="text" value="Select"/>
Comments:	<input type="text" value="Enter Comments here..."/>

(Maximum entry of 750 characters; 750 characters remaining)



2.5

Referral Request Queue (RRQ) – Monitoring Referral Requests

- RRQ – **Lists can be filtered** by each site and All sites at your agency.
- **Each tab** (Transmitted, Pending, and Completed) is a separate list in your RRQ that **can be filtered** in the column headers and all lists can be **exported** to Excel for ease of generating reports.
- Check your **email** settings to ensure you are receiving **notifications** from CAPS for referrals sent and the reminder of upcoming interviews.
- Recommend that agencies **review intake procedures and operations** for optimal utilization of the new Referral Request function.



2.5

Referral Request Queue (RRQ) – Communication with OSAHS

Contacts for questions as you move through the Request Referral Queue:

- Scheduling:
 - Melody Reid reidme@hra.nyc.gov
 - Jonathan Ford fordjo@dss.nyc.gov

- Client Referral:
 - Kimberly Butler butlerki@hra.nyc.gov
 - Alathia Barnett barnetta@hra.nyc.gov



2.5

Referral Request Queue (RRQ) – Updates and Requirements

- Effective January 1, 2023, the RRQ will be the only method for requesting a referral from OSAHS
 - The Request Referral email box has been removed.
- **Outcomes for interviews are required for ALL clients within 2 business days of the interview date.**
- OSAHS Staff will share the interview outcomes with client's case manager(s), and/or the case managers can check the Referral Status List for outcomes
- Pending referrals will prevent you from submitting new referral request for the unit and will prevent referred clients from being referred to other housing opportunities.



2.5

Referral Request Queue (RRQ) – Request Referral Process Recap

- Roster → Start here! Ensure unit features and rental subsidies are correct.
- Select Request Referral for Online units from drop down.
- RRQ Form → List a contact who can schedule interviews.
- Use the built in scheduler to indicate viewing dates and times.
- Referral Request Queue → Request will move across three tabs as they are processed:
- Transmitted, Pending, Completed
- Referral Roster → Outcomes are required within 2 business days of interview date.
- Update CAPS with client move in information in real time.
- OSAHS Communication → OSAHS Contacts are available to help you at each step of RRQ
- Monitor Referrals → Review agency procedures for optimal utilization of CAPS Referral Request

2.5

Referral Request Queue (RRQ) – Request Referral Process for other than **OSAHS**

- Roster → Start here! Ensure unit features and rental subsidies are correct.
Select Request Referral for Online units from drop down.
- RRQ Pop Up → Pop up in CAPS of who HP should contact for referrals.

These agencies will accept re-rental requests for referrals to fill online units.

Alert

To request Referrals for this unit, please contact

Center for Urban Community Services
(212) 801-3333 or (212) 801-3300
Email: housinginfo@cucs.org

OK

Alert

To request Referrals for this unit, please contact

HRA HIV/AIDS Services Administration (HASA)
Tommy Shi | Director of Housing | tommyshi@hra.nyc.gov
Alla Zarankina | Housing Unit Team Coordinator | zarankinaa@hra.nyc.gov

OK

Alert

To request Referrals for this unit, please contact

Administration for Children's Services (ACS)
Paul Williams
Director
Email: Paul.williams@acs.nyc.gov

OK

Who do I contact in OSAHS

Rent Ups: Suzie Cadichon cadichons@hra.nyc.gov

Re-Rental Vacancy Control / Scheduling/Rescheduling : Melody Reid
reidme@hra.nyc.gov

Re-Rental Referrals: Kimberly Butler butlerki@hra.nyc.gov

Re-Rental Follow-Up: Alathia Barnett barnettal@hra.nyc.gov

Coordinated Entry / Site Profile : TAD Liaison

Technical Support or Issues with CAPS Access : HRA CAS Support
hracassupport@hra.nyc.gov