Coordinated Assessment and Placement System (CAPS)
Housing Provider User Guide

Module Four – Vacancy Control System - Completing Rosters

IMPORTANT

NEW USER: Ask your System Administrator in your agency to add you as a user. If you do not have a System Administrator, or do not know who they are, email: HRACASSUPPORT@hra.nyc.gov

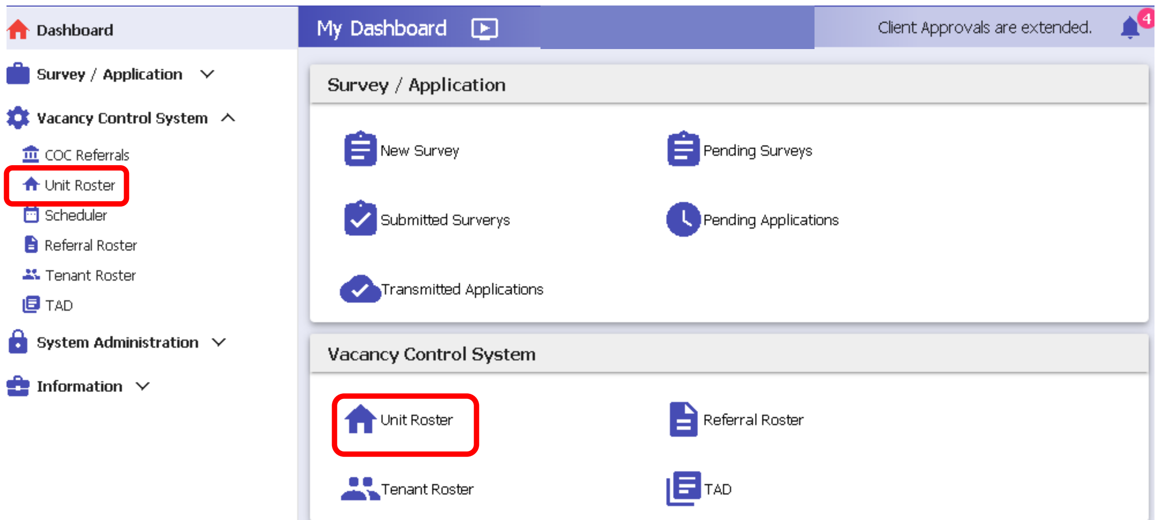
PASSWORD RESET: Email MISSECURITYADMIN@dss.nyc.gov

You must complete all unit information BEFORE you move in any tenants. Once a unit is occupied, you CANNOT update or edit any unit details. Upon log in, CAPS generates pop-up reminders about incomplete Unit Roster until all mandatory fields are completed.

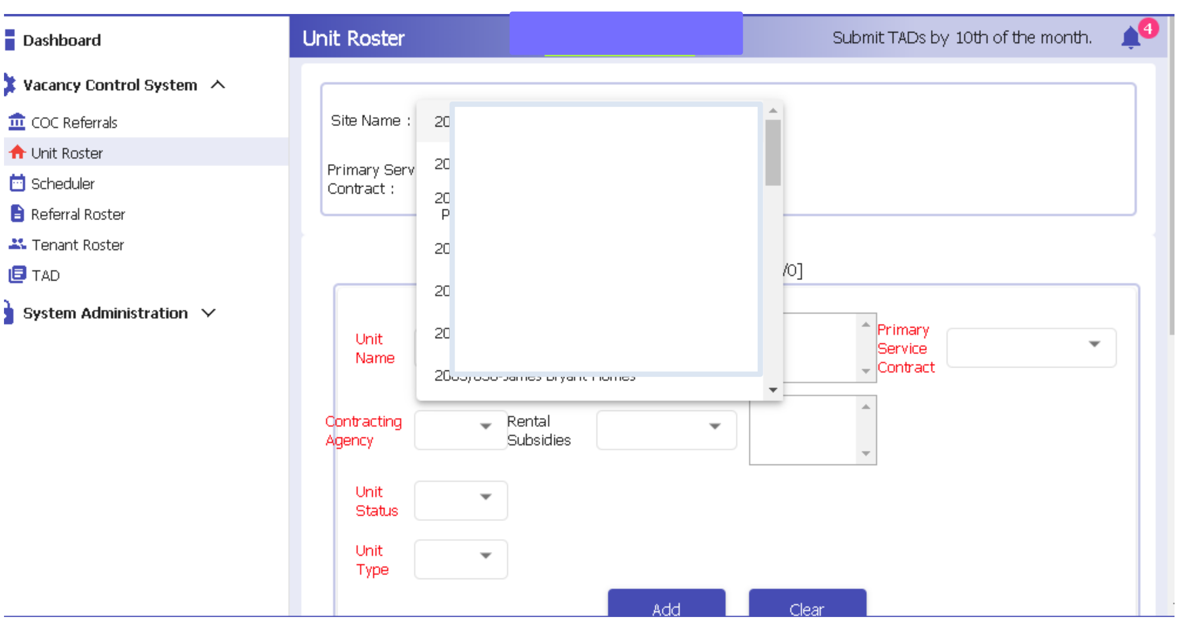
Housing Providers are required to enter details about each unit in their site, update referral outcomes, and record move-ins and move-outs for each tenant. Upon log in, the user will be prompted to complete their Unit Rosters. Until all unit details are complete for each Site, you will be re-directed to the Site with the largest number of incomplete units.

UNIT ROSTER

Users can access the Unit Roster via the **Vacancy Control System** (VCS) from either the left navigational menu, or the dashboard's main screen.



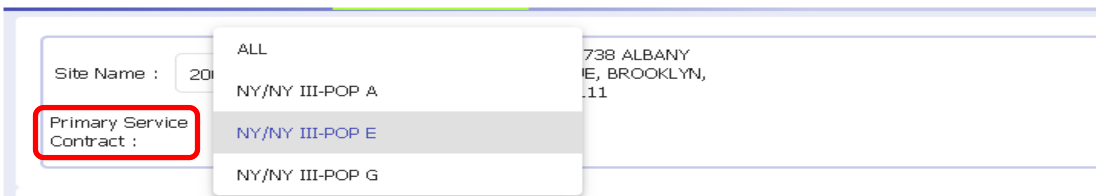
From the Unit Roster screen, select the Site Name from the drop-down menu.



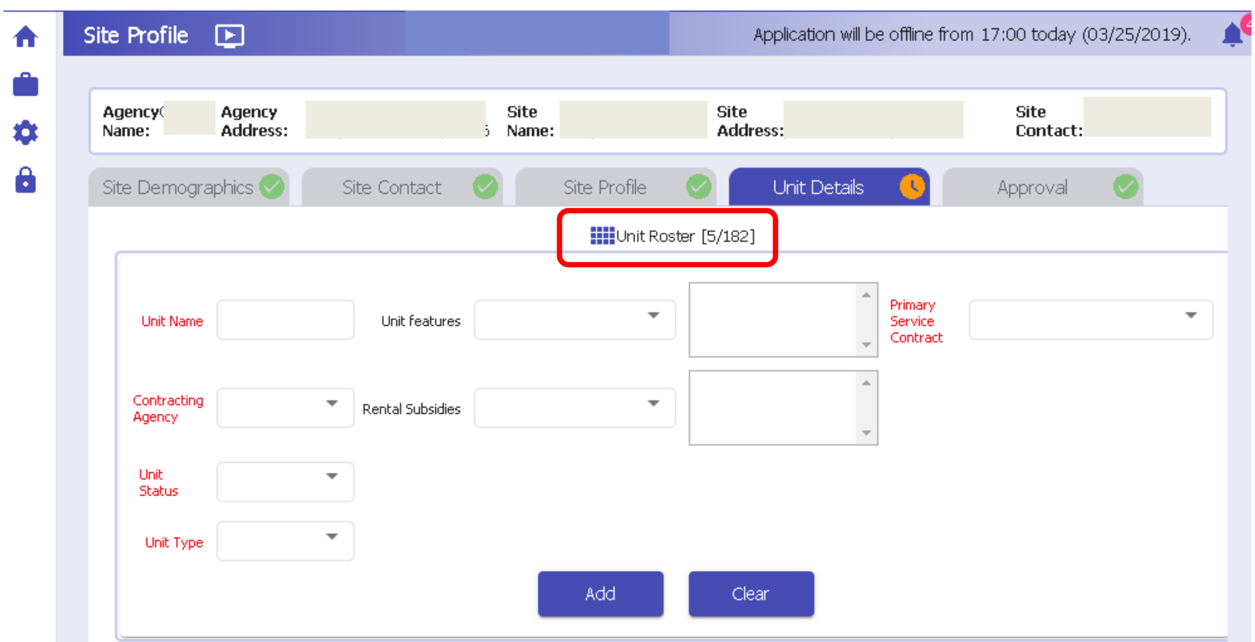
Note: If you do not find the site, it may mean one of two things:

1. You are not assigned to that particular site. Please contact your System Administrator to have the site assigned to you.
2. Your site does not exist in the system and must be created by *Requesting a New Site*; for details, see Module Three: Agency Site Request and Maintenance

The Primary Service Contract's drop-down menu will list all approved contracts for the site selected.



CAPS provides a unit roster counter (located just above the unit details window) which provides a tally of the number of units for which information has been added in relation to the number of total units in the contract. The counter changes as unit information is entered, enabling you to keep track of progress.

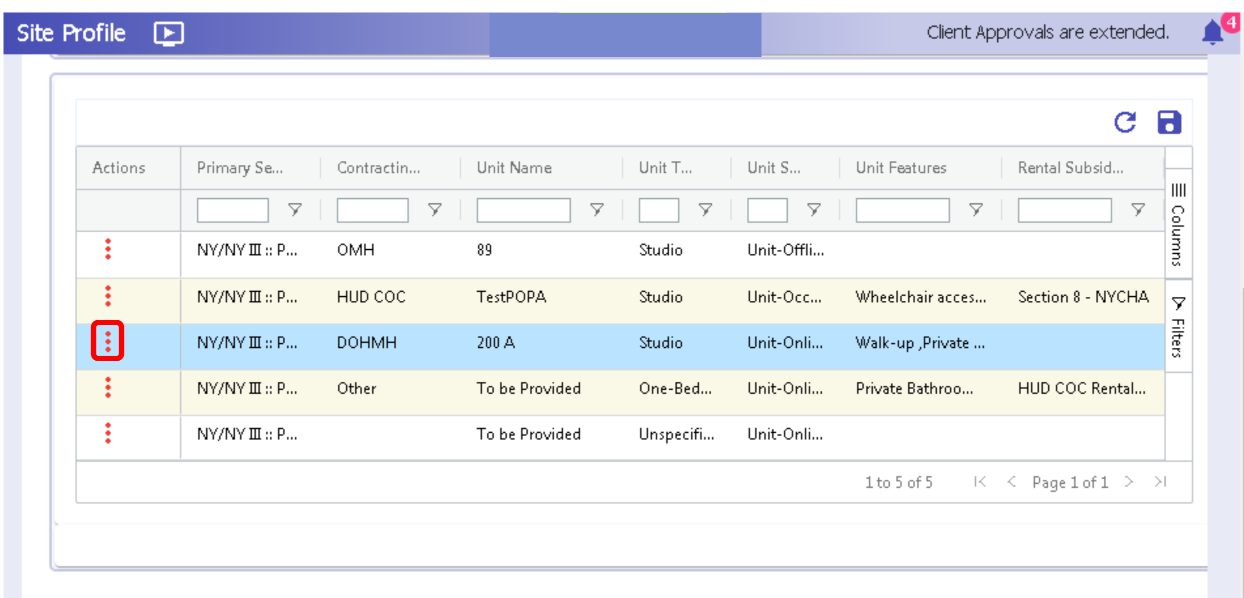


<u>Fields</u>
Unit Name: Actual name of the unit (1A, 2B, etc…)
Contracting Agency: Select Service contract agency for this unit (DOHMH, OMH, OASAS etc…)
Unit Status: Select either *offline* (vacant, renovations, etc…) or *online*. For all occupied units you must select online to set up your unit roster. <u>Once complete</u> you may move in tenants from tenant roster.
Unit Type: Studio, one bedroom, two bedroom, etc…
Unit Features: Select all features that apply from the drop-down menu.
Rental Subsidies: Select applicable subsidy from the drop-down menu.
Primary Service Contract (PSC): 1st select the PSC for the unit you want to enter. You will only see the PSCs associated with that site.
For any questions re: correct entries, contact your Program Director

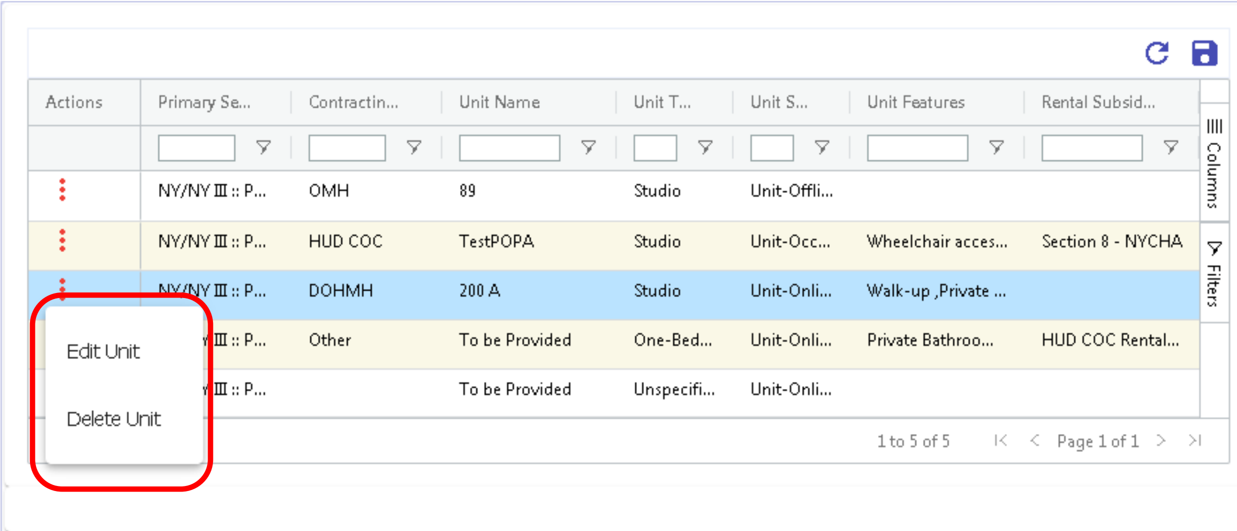
Enter all mandatory details and press the **Add** button. The counter will record the addition of the completed unit, and the details will be recorded in the list below it. You can access the added units to **edit** or **delete** via the Action column.

NOTE: When you complete all required fields, your work will be auto-saved when you navigate to another screen. If any required fields are left blank, your work will not be saved if you navigate to another screen. Make sure to press **SAVE** before you move on.

At the bottom of your screen you will see the chart with each unit listed individually. Select the row with the unit you wish to edit.



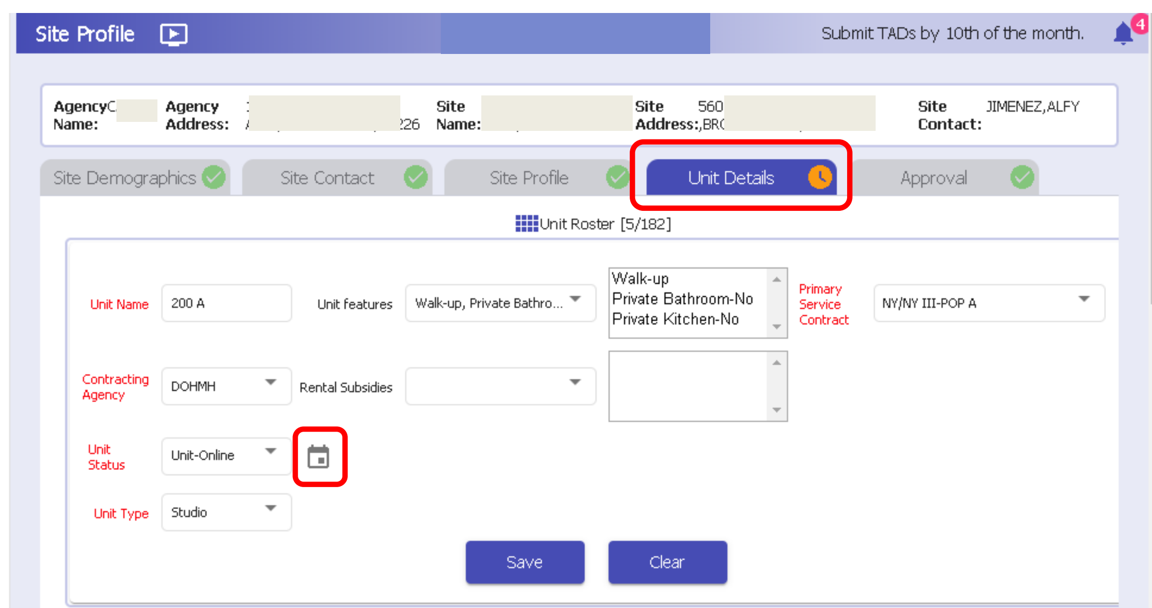
Click the ellipsis (⋮) from the Actions column and choose Edit Unit.



With this unit selected, scroll to the middle of the screen you are on. You will see the Unit Details tab selected (see the screenshot below), populated with information you previously entered. Complete the fields that are blank, and edit any necessary fields.

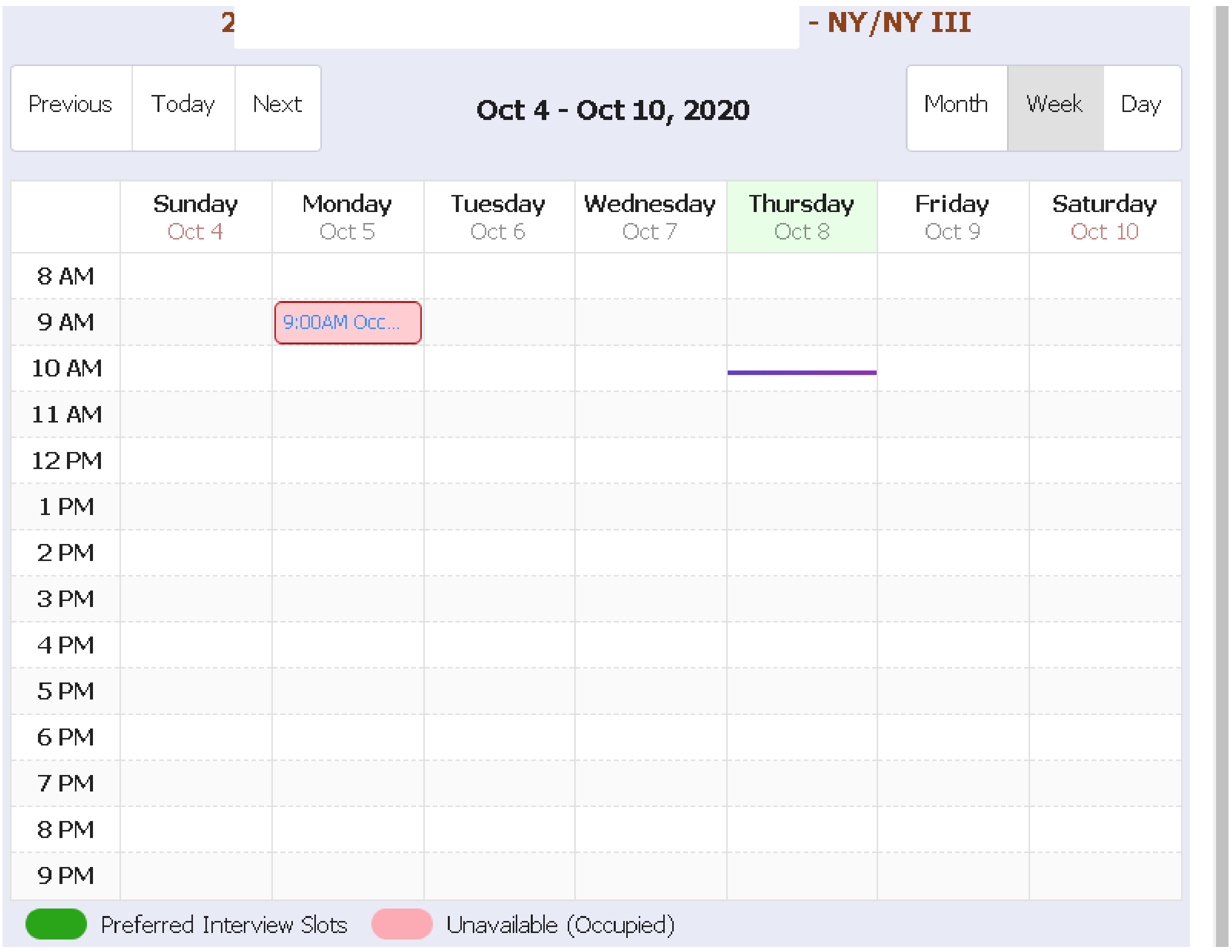
Creating Interview Appointment Slots

The ‘Unit Details’ tab is the screen from which you create appointment slots for tenant interviews.



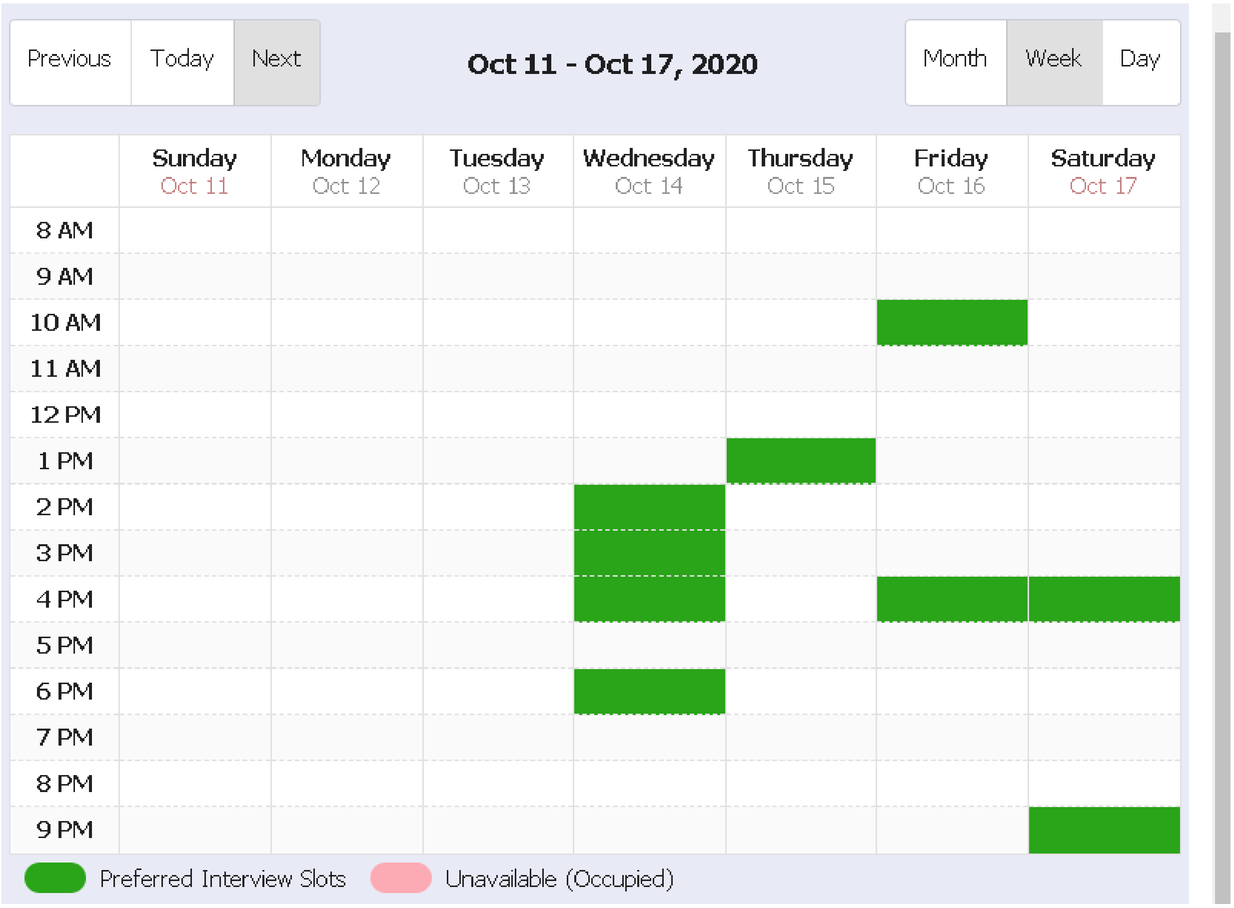
Note: Appointment slots can **only** be created for online units! Offline units must be updated to online before creating appointment slots for interviews.

Click the calendar ( ) icon next to the Unit Status field (above). The calendar will open to display the current week. Appointment slots can only be created in a week or day calendar view. You can toggle between month, week, and day view from the right side of the date, above the calendar.



Note: Interviews must be scheduled no less than five (5) business days from today's date. (Today is visible on the calendar by a highlight on the day and a blue line through the hour.

Select available timeslot(s) for interviews by clicking once on the intended hour(s). The slot will turn green. Clicking again on the same slot will deselect the hour. At this time, only one interview can be scheduled per hour.

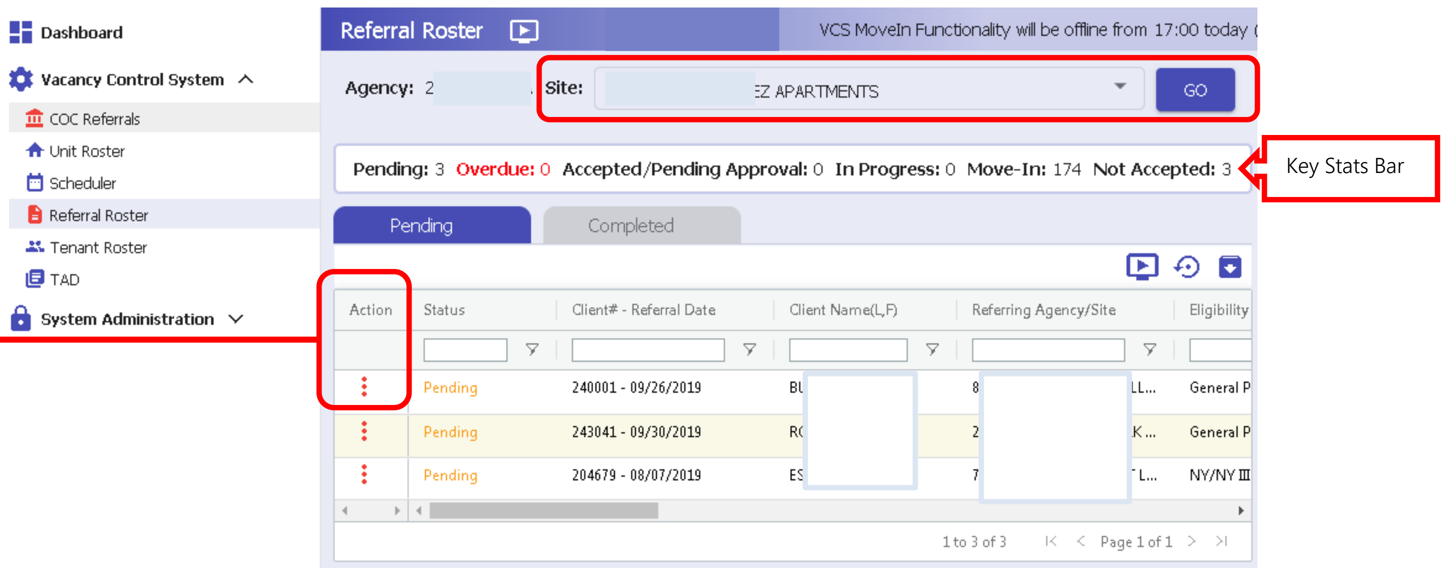


Once an interview is scheduled in a time slot, it will show as unavailable in pink. When you've selected all the slots you wish to make available for interviews, press the **SAVE** button below the calendar.

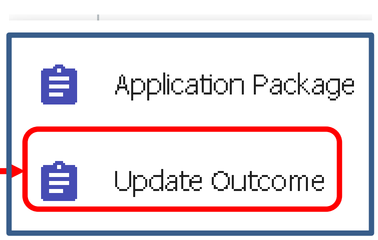
REFERRAL ROSTER

Access the Referral Roster via the Vacancy Control System (VCS) from either the left navigational menu or the dashboard's main window.

Select the site from the drop-down menu, and press **GO**. Refer to the *Key Stats Bar* for any pending, overdue or in progress referrals that need to be updated. Any overdue items will display in red.



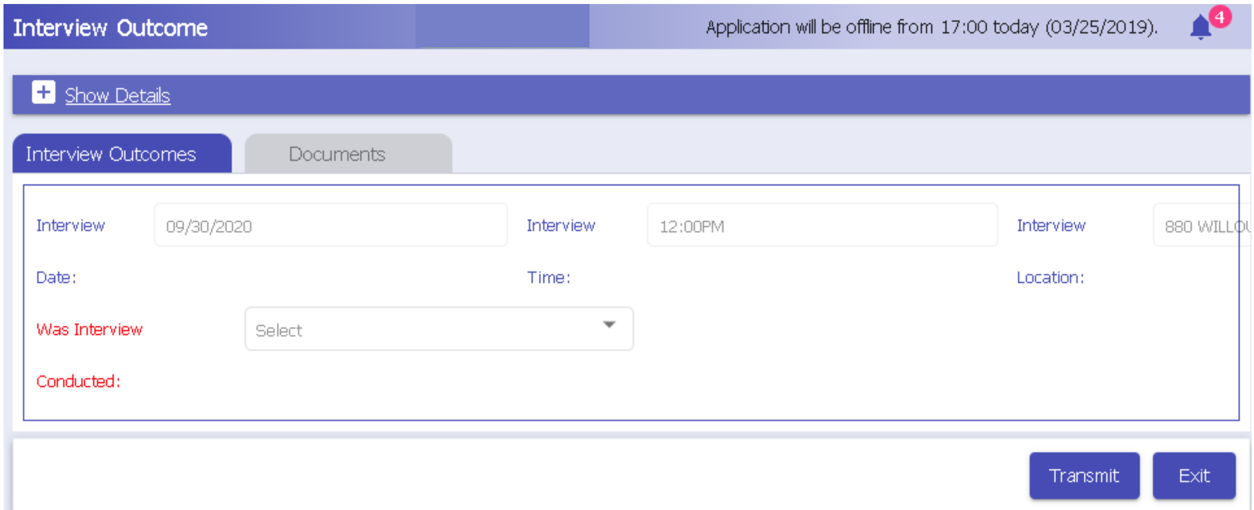
Choose *Update Outcome* from the Action column drop down menu.



The Interview Outcome page will default to displaying Client, Referral, and Housing Agency/Site Details open at the top of the screen. You may toggle between showing and hiding these details by clicking 

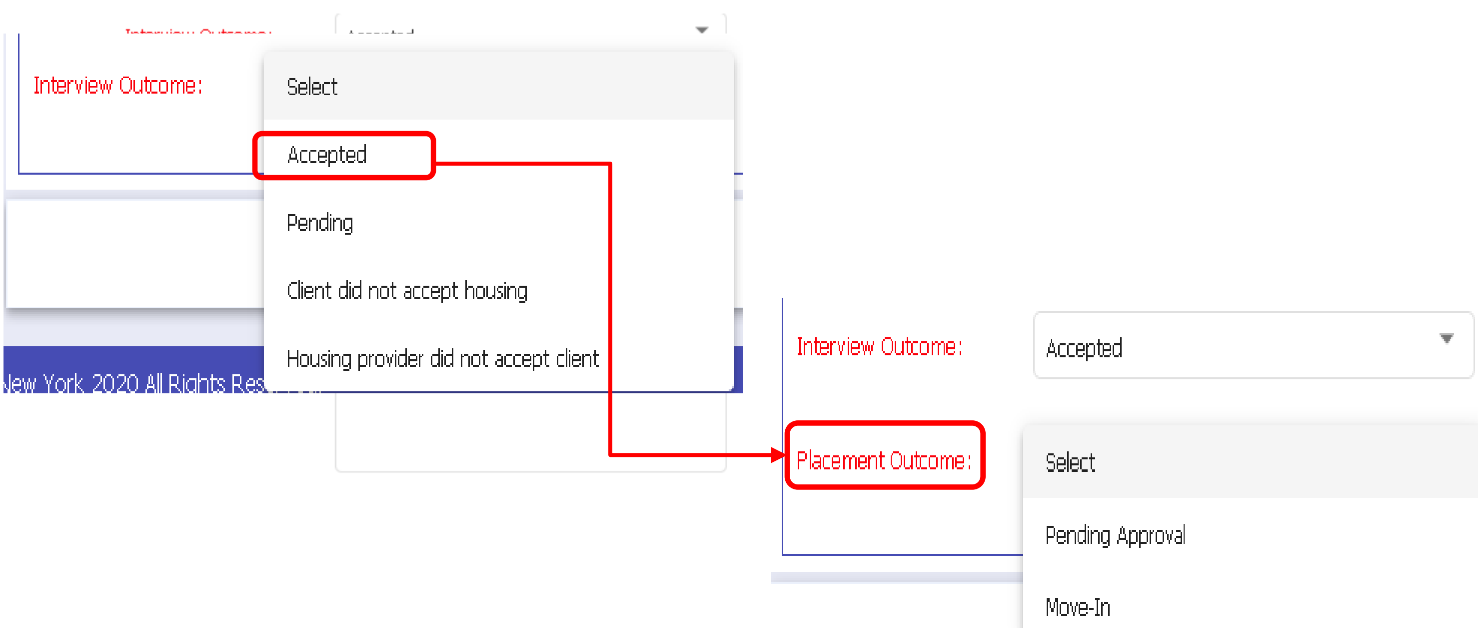
the plus (+) and minus (-) signs at the top of the screen.

In the section below those details, you have two tabs to complete: **Interview Outcomes** and **Documents**.

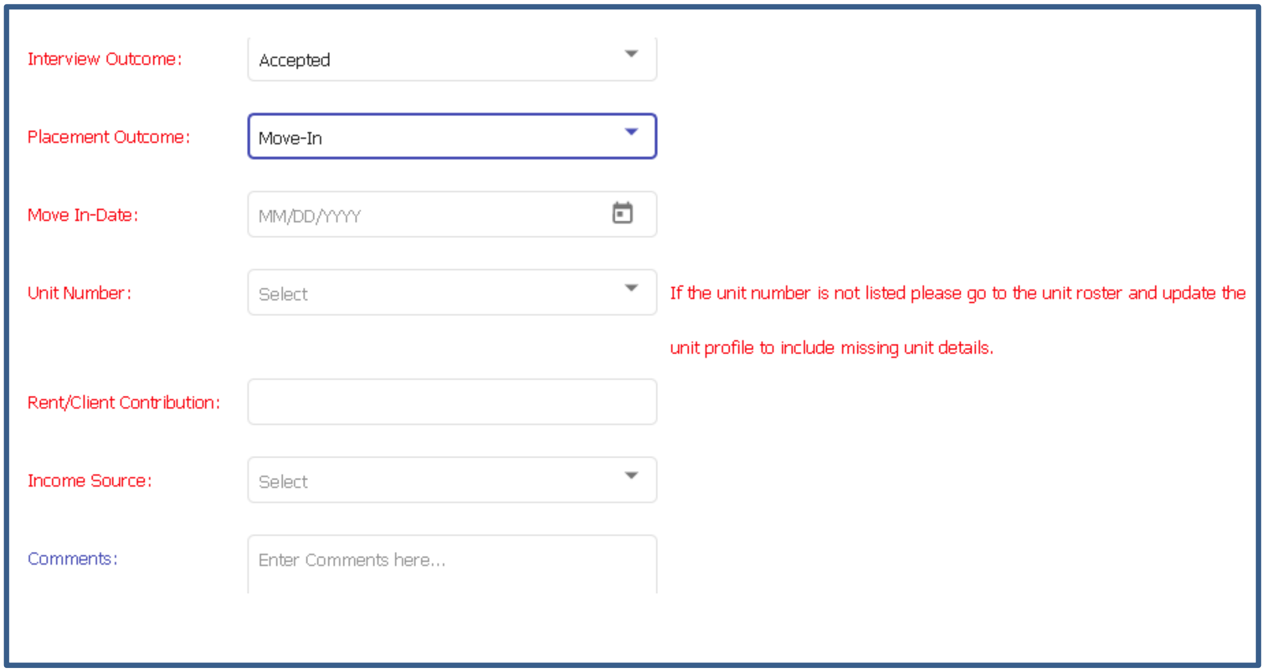


Depending on how you complete the Interview Outcome and Placement Outcome fields, additional fields of required information are enabled. As shown here, indicating that the Interview Outcome was **Accepted** enables the Placement Outcome field.

Selecting a **Placement Outcome** value of ***Pending Approval*** triggers the additional information requirements of *Expected Move-In Date*, and *Comments*, with optional *Unit Number*.

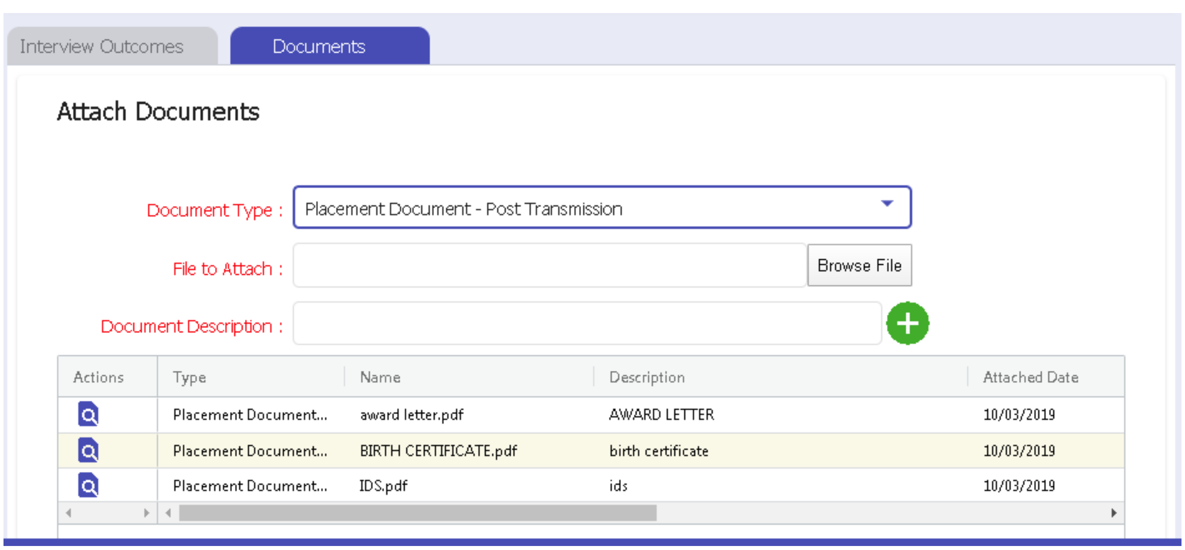


Selecting the **Placement Outcome** value of ***Move-In*** produces the additional information requirements of *Move-In Date*, *Unit Number*, *Rent/Client Contribution* (indicate weekly, monthly, or annually), and *Income Source*, with optional *Comments*.



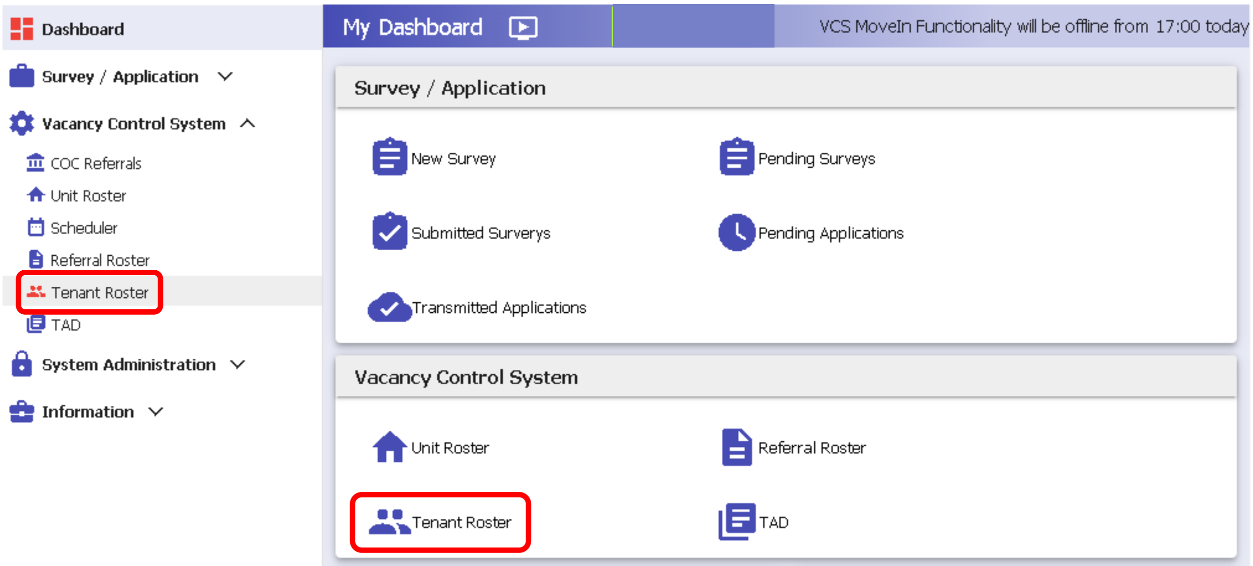
Via the Documents tab attach any documents required for move-in. You may also view documents attached as part of the referral.

Once you have updated all referrals for that site, you have completed your referral roster.

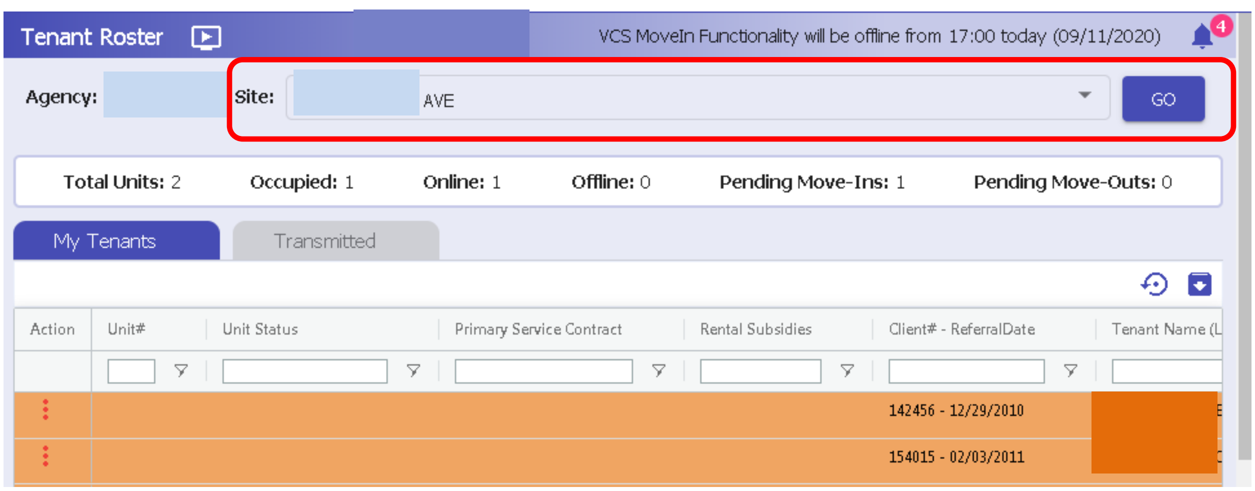


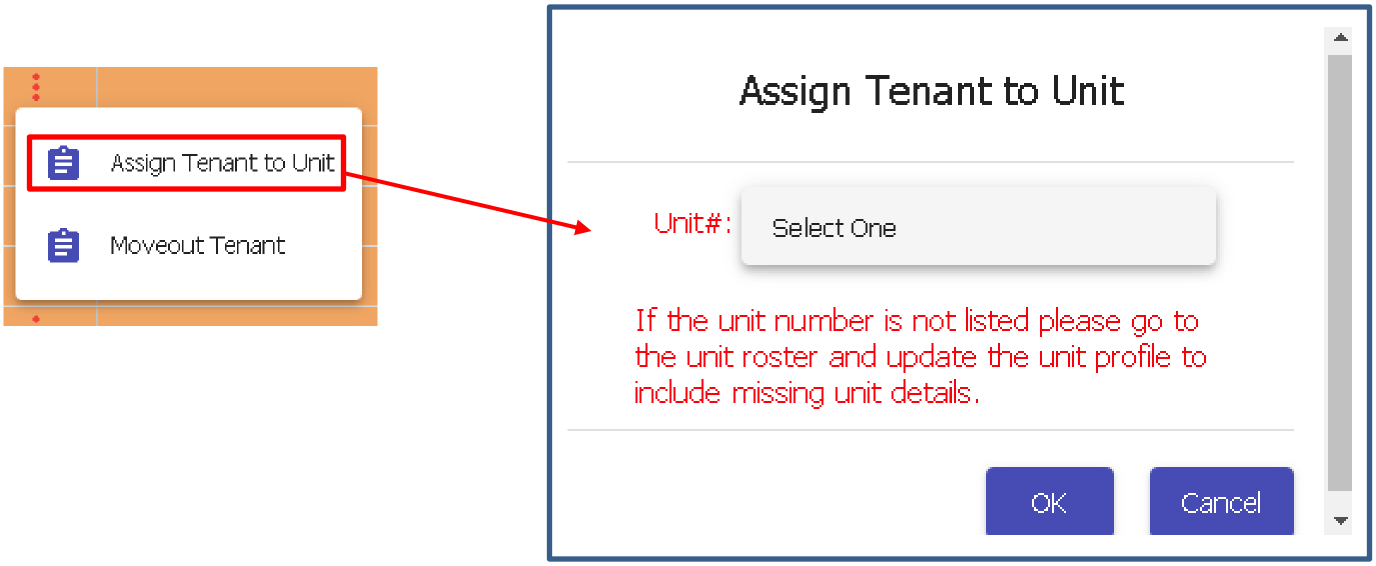
TENANT ROSTER

Navigate to the Tenant Roster in the Vacancy Control System from either the left navigational menu or the main Dashboard screen.



Select the Site from the drop-down menu, and press **GO**. 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.





A pop-up will appear from which you will choose the correct unit for the identified tenant. Press **OK**.

The system reminds you that if the unit number you are looking for is not listed, you may need to update the unit profile to include the missing unit details.

You will be prompted to verify the choice you've made. Press **OK** to verify, or **Cancel** to change it.

Upon verification, the tenant moves from their position on the list, and the orange highlight disappears, as this individual has been assigned. Continue until all awaiting tenants have been assigned to their units.

NOTE: The tenant 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 tenant 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 tenant.