Coordinated Assessment and Placement System
Housing Provider User Guide

Module Two – Introduction to CAPS Functionality

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🚨 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

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Welcome to the Coordinated Assessment and Placement System (CAPS). This system is a web-based platform designed to provide centralized access to the Coordinated Assessment Survey, the NYC Supportive Housing Application, and the Vacancy Control System.

- The **Coordinated Assessment Survey** is an automated tool used to assist case managers develop a housing plan for individuals and families who are currently homeless or at risk of becoming homeless. The survey determines potential eligibility for supportive housing and city, state, and federal rental subsidies.

- The **NYC Supportive Housing Application**, formerly known as the *HRA 2010e*, is an electronic application that is completed by a provider agency on behalf of the client to determine eligibility for supportive housing, including General Population housing.

- The **Vacancy Control System** allows easy identification of units available for referral. Supportive housing providers are able to report the status of their units, anticipated unit availability, and interview outcomes for available units.

Successful login to CAPS opens to the Dashboard. Information displayed on **My Dashboard** is user specific. The icons and components available will differ for staff at a Referral Agency, Placement Entity, or Housing Provider. The *Stats* are specific to the staff member's workload.

Many elements in CAPS, however, are universal. We discuss those elements here.

KEY FUNCTIONAL ELEMENTS

Evident at the top of every screen in the system is what is known as the title bar, which most notably displays the name of the system, and its proprietor, the Human Resources Administration (HRA) of the City of New York's Department of Social Services (DSS).

Two icons are displayed on the title bar:

The **User Profile** indicates who is logged in, whether they work with a referral, placement, or provider agency, and when they last logged in. It is also where they log-out of the system.

This icon allows the user to contract or expand the left navigational column on the screen. This function allows for expanded work space in the main window. The contracted view shows only the icons on the left while the expanded view contains the icons and their corresponding titles.

LEFT NAVIGATIONAL MENU ICONS

The **Dashboard** icon allows you to return to the dashboard from wherever you are in the system. It displays in the upper left corner navigational menu of all screens.

The **Survey/Application** icon allows access for Referral Agencies to New, Submitted, and Pending Surveys; and Pending and Transmitted Applications screens.

The **Vacancy Control System** icon provides access to screens related to Housing Provider functions, such as Unit Roster, Referral Roster, Tenant Roster and the TAD screens.
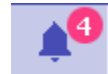
The **System Administration** icon provides access to Agency/Site Profile and User Security screens.

The **Information** icon allows access to Housing Resources, Application Instructions, and Training for all users

The **Page Title Banner**, below, is evident on every screen. The banner displays the screen you're on, on the left, as well as the following two items.

 The **bell** icon indicates that there are **notifications** which may impact the users' work in the system. The circled number beside the bell shows how many notifications there are. The notifications display in scrolling fashion to the left of the bell on the Page Title Banner.

 The video screen icon indicates the availability of **Tutorial Help**. Clicking that icon will route you to a video clip or written training material pertaining to functionality for the screen you are on.
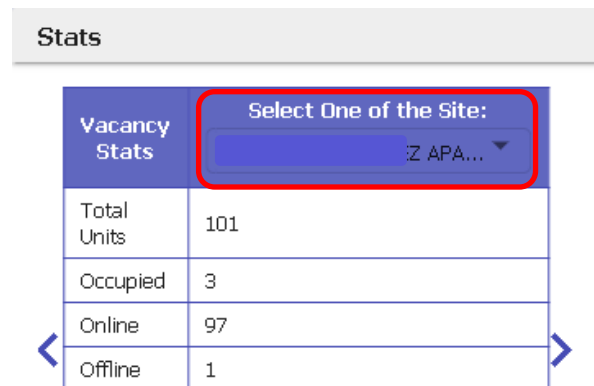
> **NOTE**: Training videos are currently under development. See the Announcements section on the Dashboard for updates.

STATS

The **Stats** box, found on the lower left quadrant of the Dashboard, provides user specific statistics. The chart automatically scrolls to display **Vacancy** and **Referral/ Placement** stats.

- **Vacancy** stats display the number of units currently occupied, online, or offline.

- **Referral/Placement** stats show supportive housing referral outcomes for the time frames listed for the selected site.

You can choose to display the stats of any of your assigned sites by using the drop-down menu under **Select One of the Site(s)**.
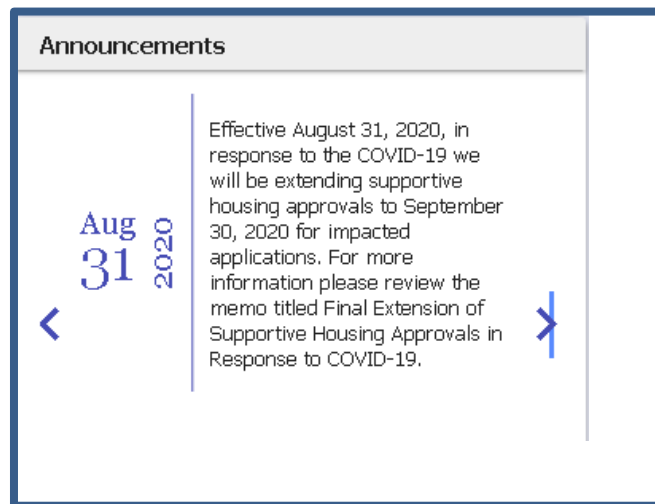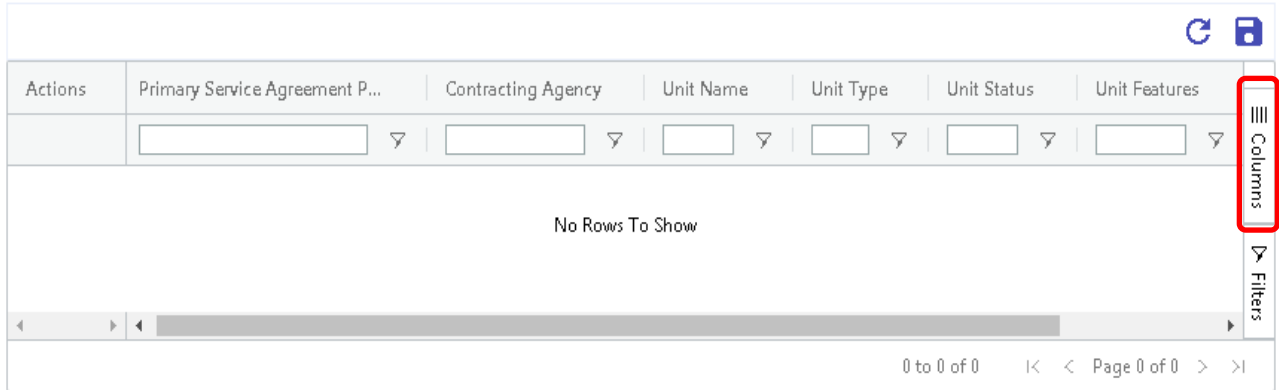
ANNOUNCEMENTS

In the lower right quadrant of the Dashboard are **Announcements**. Announcements present important information regarding changes in the system. The display automatically scrolls through all entered announcements. Memos referenced in the announcement also are available in the Information section.

Note: Users are advised to regularly check the *Announcements* and share the information with staff and co-workers.

Announcements

Aug 31 2020

Effective August 31, 2020, in response to the COVID-19 we will be extending supportive housing approvals to September 30, 2020 for impacted applications. For more information please review the memo titled Final Extension of Supportive Housing Approvals in Response to COVID-19.
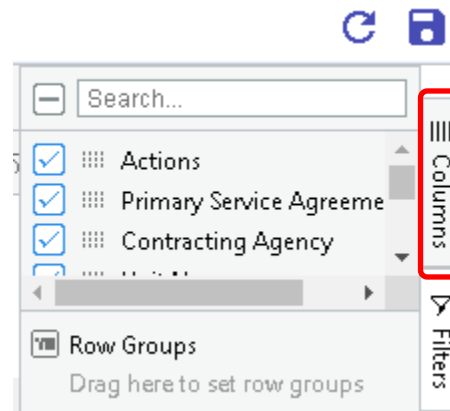
CUSTOMIZE COLUMNS

Within all sections in CAPS, there are customizable charts. The charts default to display a certain set of columns. You may temporarily eliminate columns and re-arrange the order in which they appear. To manipulate the column display, click on the word 'columns' along the right side of the chart. (See the screenshot on the next page.) The column menu list will pop-out. The full list of available columns appears, with check marks beside those columns currently being displayed.

Check or uncheck the header according to the criteria you wish to see. Your cursor will become a hand that allows you to 'grab' the item and move it up or down.

The search function allows you to type in the column header you want. To rearrange the order of columns, move your mouse to the (⃛) icon. When you configure the chart to your specifications, you may export the data to an Excel spreadsheet by clicking the disk icon (🖫) .

CUSTOMIZE FILTERS

To access the **Filter** functionality, click on the funnel (▽) icon. To filter individual columns, select the funnel located beside the individual column headers. To filter several columns at once, select the filter located along the right side of the chart. The filter menu will ▽ pop-out. As shown here, select the category's "Contains" arrow and enter your filter criteria in the field that appears below it. To collapse the pop-out filter menu, click the filter button again.

To reset the filters, click the reset (↻) icon (shown in the screenshot on the previous page).