





## 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](mailto:HRACASSUPPORT@hra.nyc.gov)

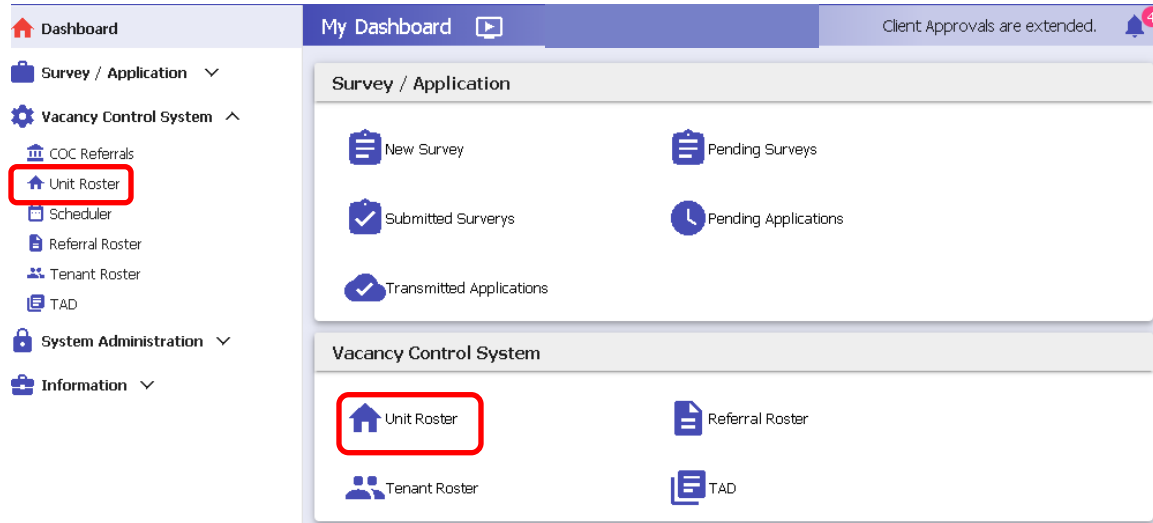
 **PASSWORD RESET:** Email [MISSECURITYADMIN@dss.nyc.gov](mailto:MISSECURITYADMIN@dss.nyc.gov)

 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.

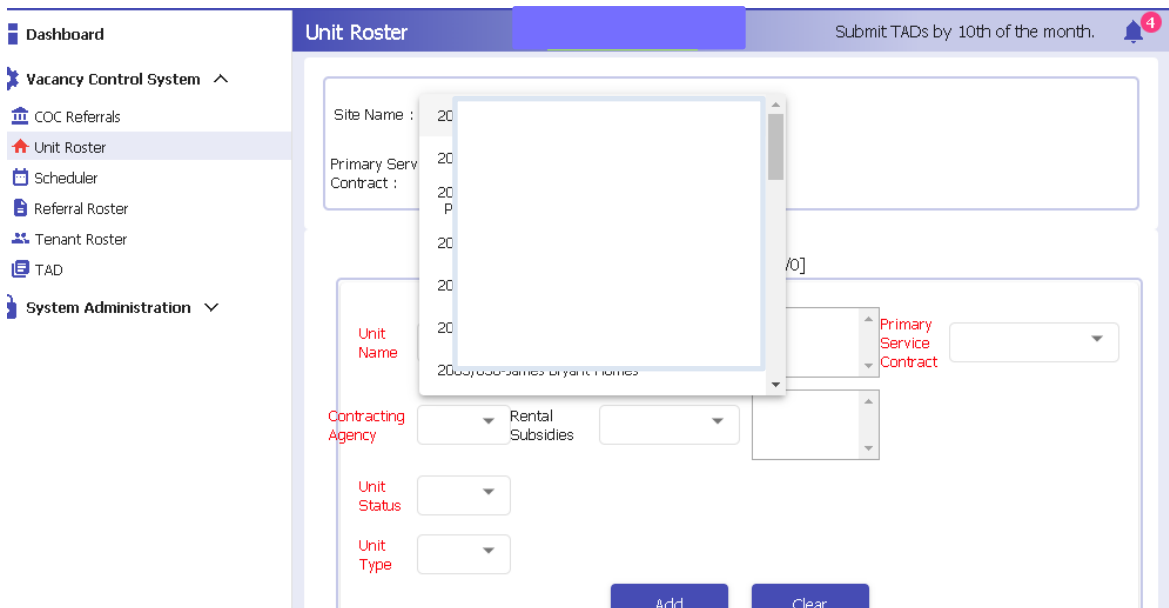
Housing Providers are required to enter details about each unit in their site, update referral outcomes, and record move-ins and move-outs for each tenant. Upon log in, the user will be prompted to complete their Unit Rosters. Until all unit details are complete for each Site, you will be re-directed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



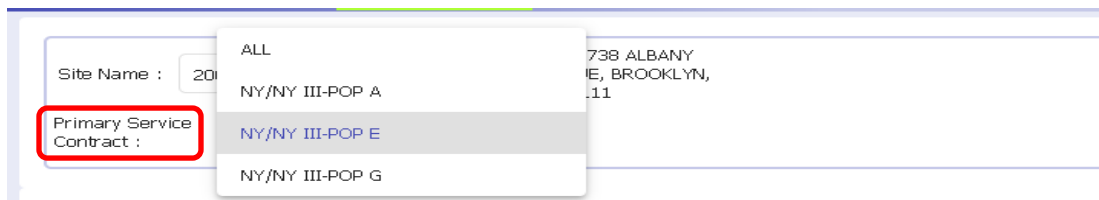
From the Unit Roster screen, select the Site Name from the drop-down menu.



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

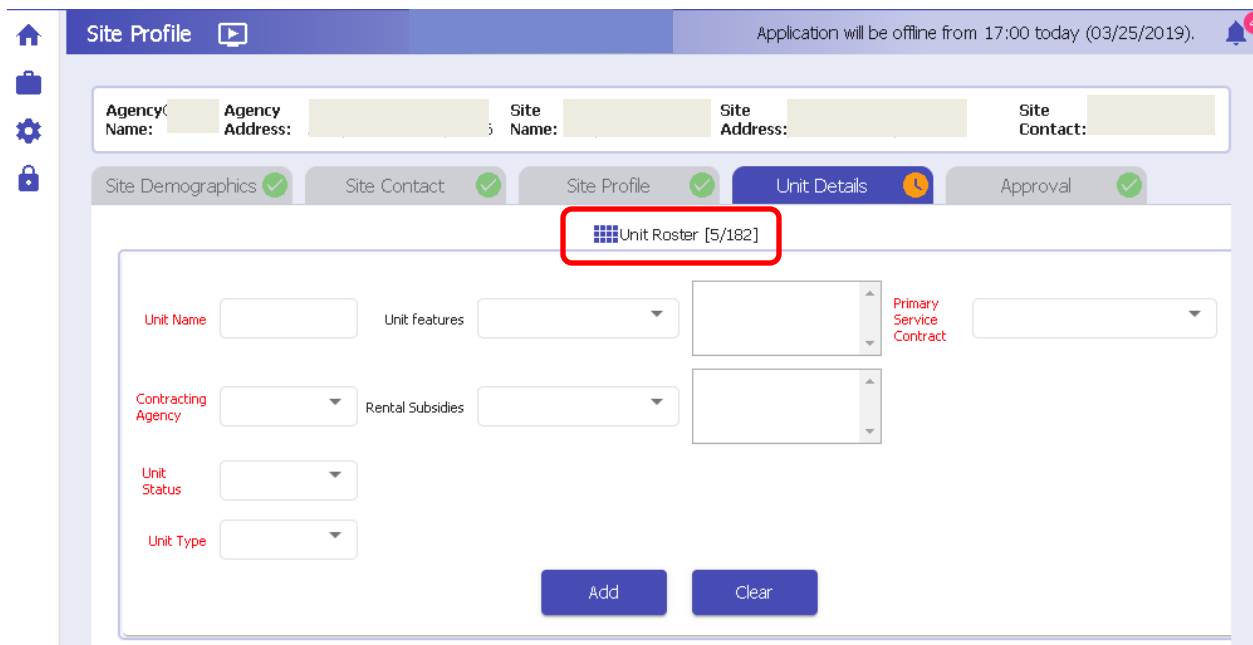
1. You are not assigned to that particular site. Please contact your System Administrator to have the site assigned to you.
2. Your site does not exist in the system and must be created by *Requesting a New Site*; for details, see Module Three: Agency Site Request and Maintenance

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



A screenshot of a web form. The 'Primary Service Contract' field is highlighted with a red box. A dropdown menu is open, showing the following options: ALL, NY/NY III-POP A, NY/NY III-POP E (highlighted), and NY/NY III-POP G. To the right of the dropdown, the site name '738 ALBANY' and address 'IE, BROOKLYN, .11' are visible.

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.



A screenshot of the CAPS 'Site Profile' page. The 'Unit Roster' counter is highlighted with a red box and shows '5/182'. Below the counter are several form fields: Unit Name, Unit Features, Contracting Agency, Rental Subsidies, Unit Status, and Unit Type. There are also 'Add' and 'Clear' buttons at the bottom. The page header shows 'Site Profile' and a notification that the application will be offline from 17:00 today (03/25/2019).

### Fields

**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. Once complete 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):** 1<sup>st</sup> 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.

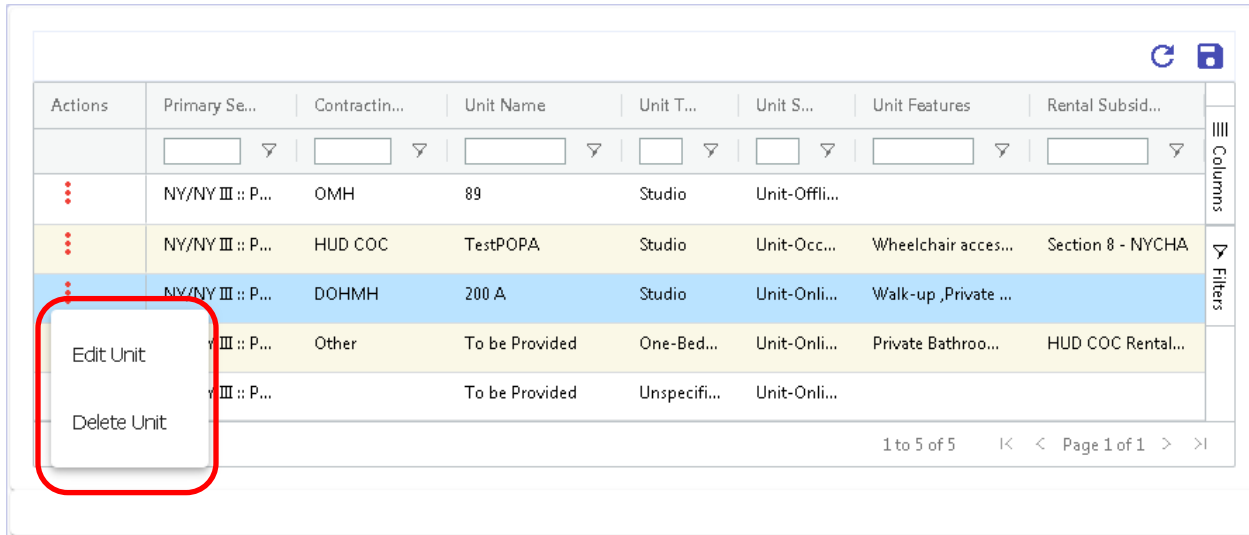
At the bottom of your screen you will see the chart with each unit listed individually. Select the row with the unit you wish to edit.

Site Profile Client Approvals are extended.

Actions	Primary Se...	Contractin...	Unit Name	Unit T...	Unit S...	Unit Features	Rental Subsid...
⋮	NY/NY III :: P...	OMH	89	Studio	Unit-Offli...		
⋮	NY/NY III :: P...	HUD COC	TestPOPA	Studio	Unit-Occ...	Wheelchair acces...	Section 8 - NYCHA
⋮	NY/NY III :: P...	DOHMH	200 A	Studio	Unit-Onli...	Walk-up ,Private ...	
⋮	NY/NY III :: P...	Other	To be Provided	One-Bed...	Unit-Onli...	Private Bathroo...	HUD COC Rental...
⋮	NY/NY III :: P...		To be Provided	Unspecifi...	Unit-Onli...		

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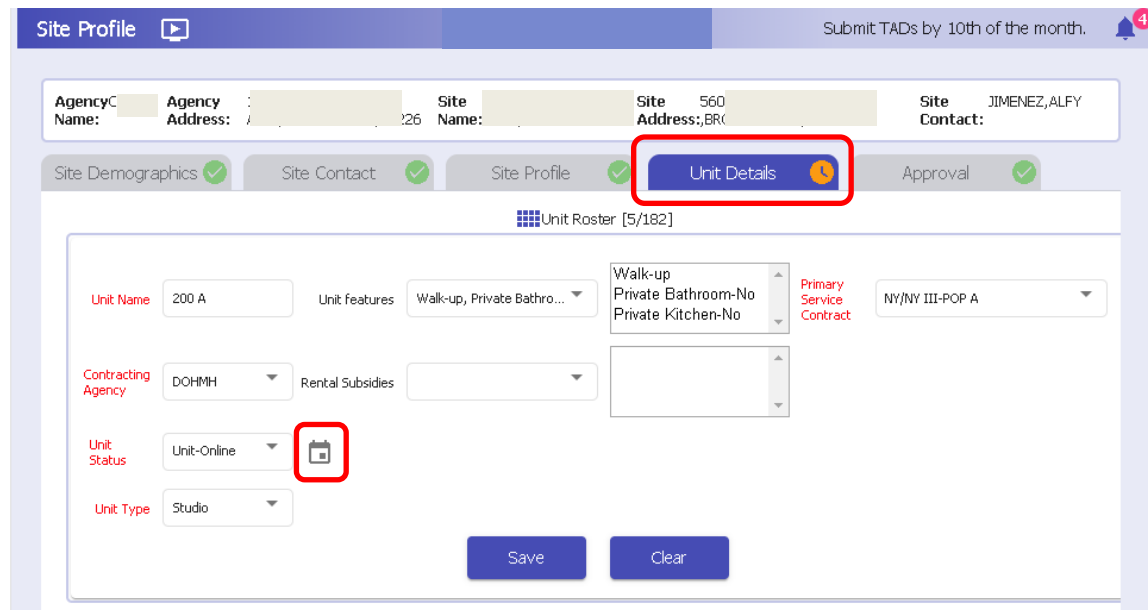
Click the ellipsis (  ) from the Actions column and choose Edit Unit.



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.

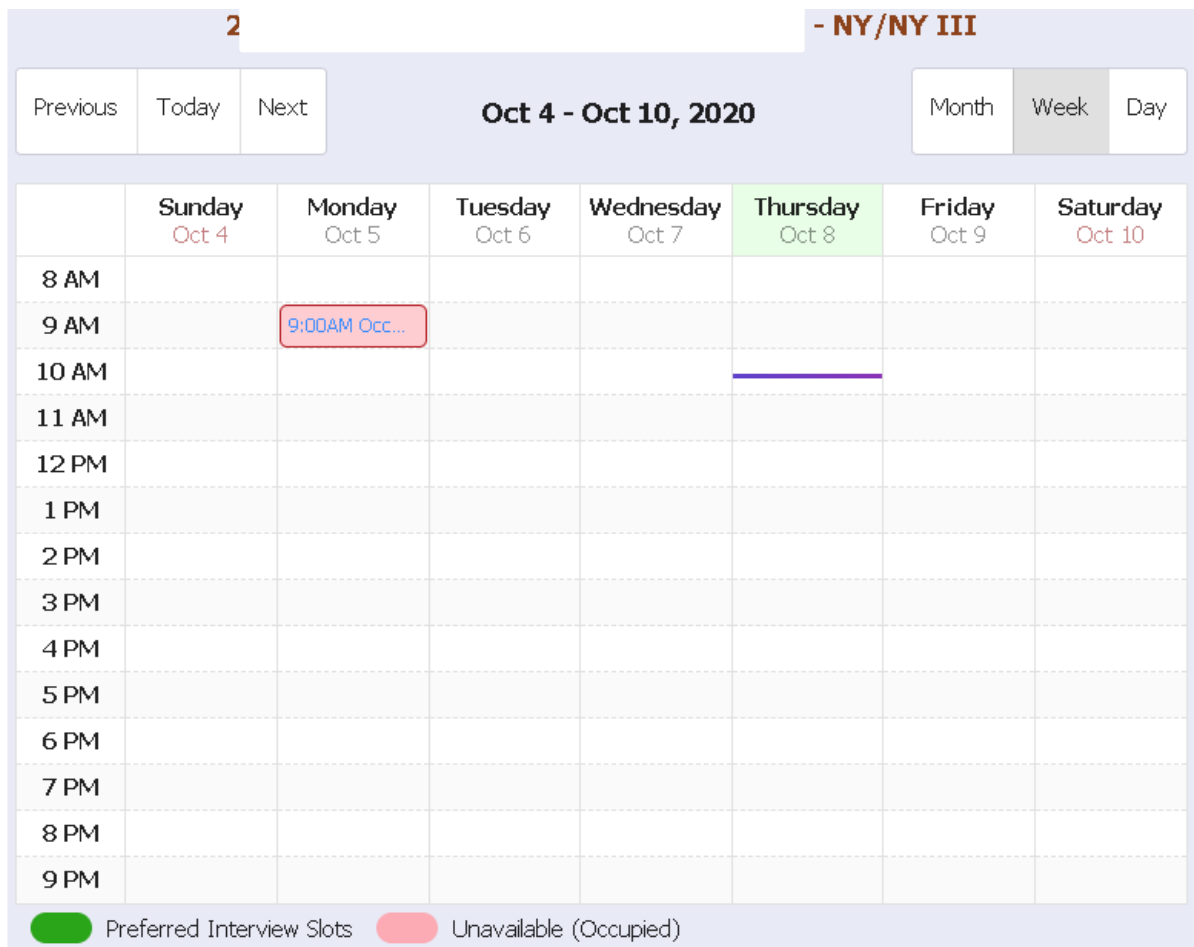
### Creating Interview Appointment Slots

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



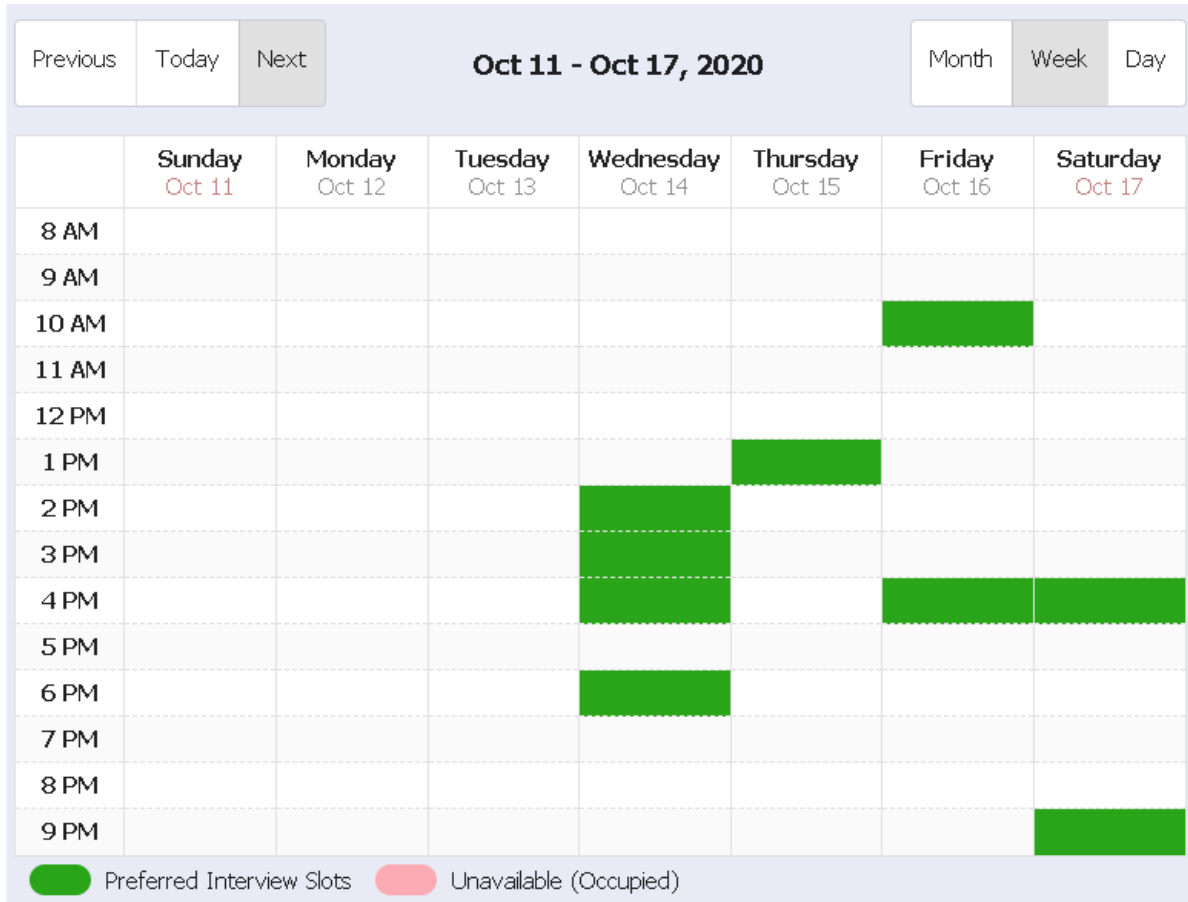
**Note:** Appointment slots can **only** be created for online units! Offline units must be updated to online before creating appointment slots for interviews.

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**.

Dashboard

Vacancy Control System

COC Referrals

Unit Roster

Scheduler

Referral Roster

Tenant Roster

TAD

System Administration

Referral Roster

VCS MoveIn Functionality will be offline from 17:00 today

Agency: 2 Site: EZ APARTMENTS GO

Pending: 3 Overdue: 0 Accepted/Pending Approval: 0 In Progress: 0 Move-In: 174 Not Accepted: 3

Key Stats Bar

Pending Completed


Action	Status	Client# - Referral Date	Client Name(L,F)	Referring Agency/Site	Eligibility
⋮	Pending	240001 - 09/26/2019	BU	8	LL... General P
⋮	Pending	243041 - 09/30/2019	RC	2	K... General P
⋮	Pending	204679 - 08/07/2019	ES	7	L... NY/NY III

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

Application Package

Update Outcome

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  Hide Details 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**.

The screenshot shows a web application interface for 'Interview Outcome'. At the top, there is a blue header with the text 'Interview Outcome' and a notification 'Application will be offline from 17:00 today (03/25/2019)'. Below the header is a '+ Show Details' button. The main content area has two tabs: 'Interview Outcomes' (active) and 'Documents'. The form contains several input fields: 'Interview' (09/30/2020), 'Date:', 'Interview' (12:00PM), 'Time:', 'Interview' (880 WILL O...), 'Location:', 'Was Interview' (Select), and 'Conducted:'. At the bottom right, there are 'Transmit' and 'Exit' buttons.

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*.

The diagram illustrates the relationship between the 'Interview Outcome' and 'Placement Outcome' dropdown menus. On the left, the 'Interview Outcome' dropdown is shown with options: 'Select', 'Accepted', 'Pending', 'Client did not accept housing', and 'Housing provider did not accept client'. The 'Accepted' option is highlighted with a red box. A red arrow points from this box to the 'Placement Outcome' dropdown on the right, which is also highlighted with a red box. The 'Placement Outcome' dropdown shows options: 'Select', 'Pending Approval', and 'Move-In'. This visualizes how selecting 'Accepted' in the first dropdown enables the second dropdown.

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*.

**Interview Outcome:**

**Placement Outcome:**

**Move In-Date:**

**Unit Number:** 
If the unit number is not listed please go to the unit roster and update the unit profile to include missing unit details.

**Rent/Client Contribution:**

**Income Source:**

**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.

Interview Outcomes
Documents

**Attach Documents**

**Document Type:**

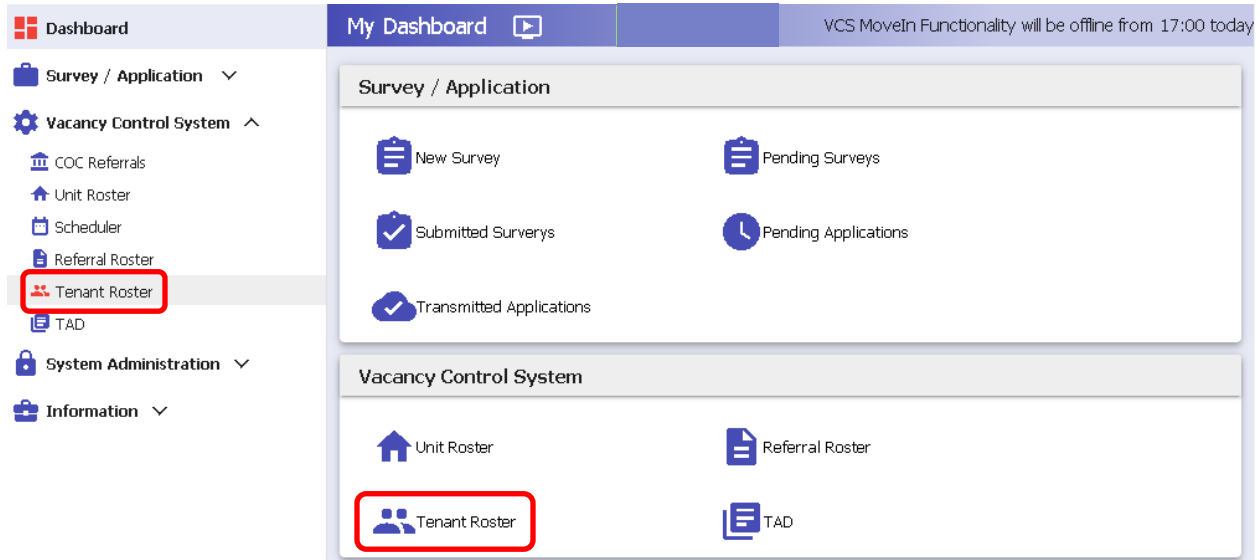
**File to Attach:**

**Document Description:**  +

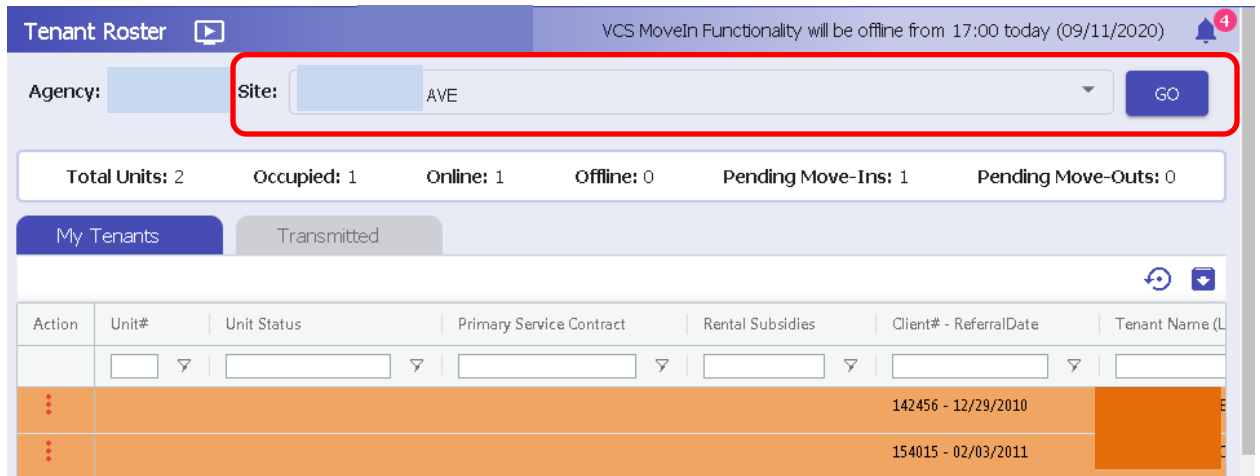
Actions	Type	Name	Description	Attached Date
	Placement Document...	award letter.pdf	AWARD LETTER	10/03/2019
	Placement Document...	BIRTH CERTIFICATE.pdf	birth certificate	10/03/2019
	Placement Document...	IDS.pdf	ids	10/03/2019

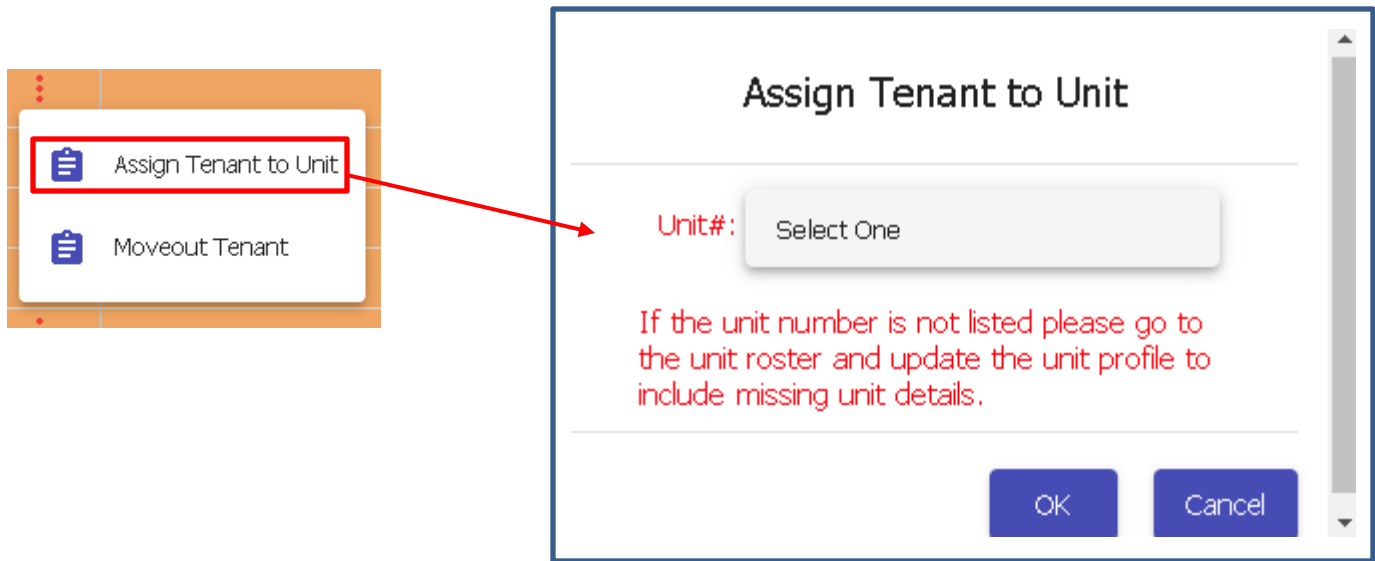
# TENANT ROSTER

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.