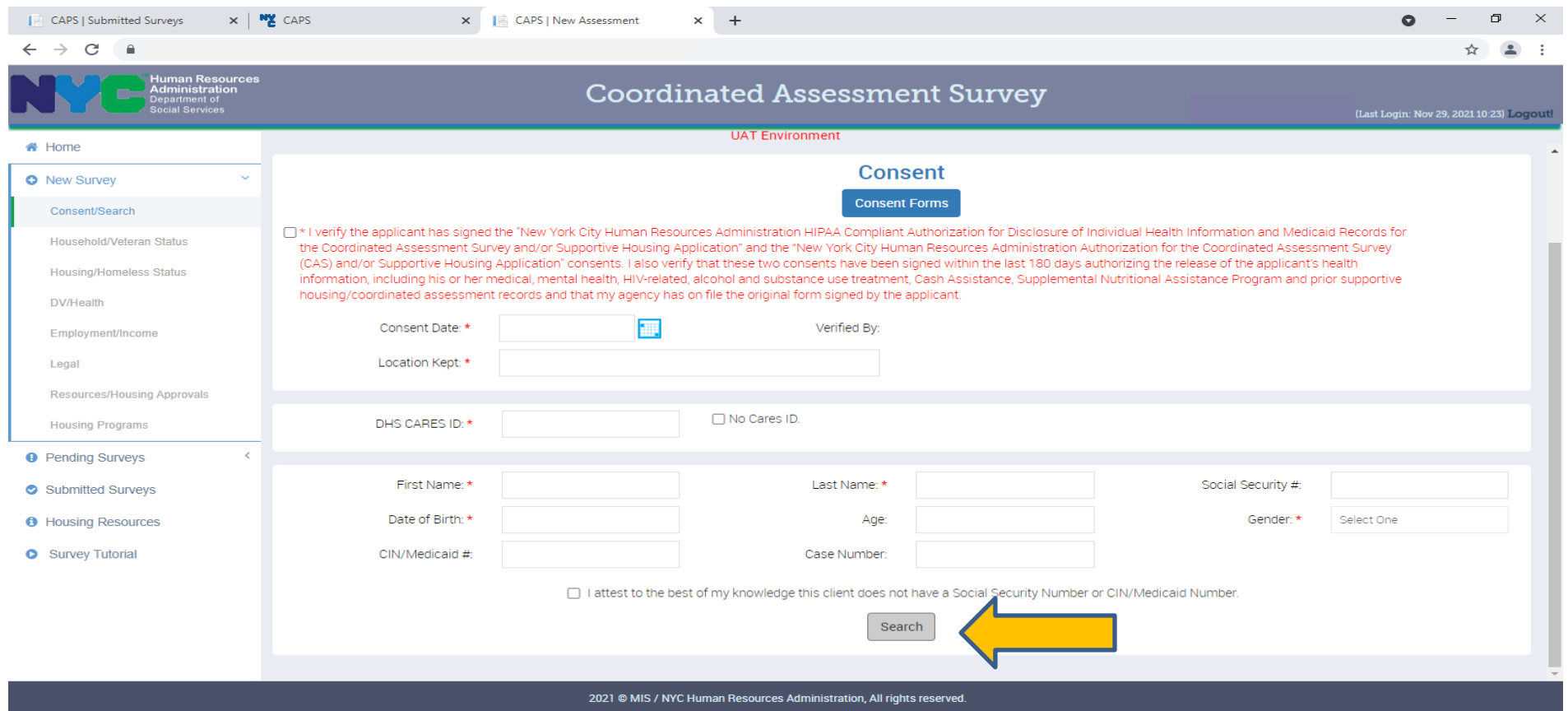


Coordinated Assessment Survey Access Client Documents

The purpose of this document is to show various ways you can access Client Documents in CAPS, which may be useful for completing additional applications.

New Survey ~~ Consent/Search

After obtaining consent from your client, you will enter the clients identifying information First Name, Last Name, Social Security #, Date of Birth, and Gender. Once this information is entered, select the Search button.



CAPS | Submitted Surveys x | CAPS x | CAPS | New Assessment x +

NYC Human Resources Administration Department of Social Services

Coordinated Assessment Survey

(Last Login: Nov 29, 2021 10:23) Logout

UAT Environment

Consent

[Consent Forms](#)

* I verify the applicant has signed the "New York City Human Resources Administration HIPAA Compliant Authorization for Disclosure of Individual Health Information and Medicaid Records for the Coordinated Assessment Survey and/or Supportive Housing Application" and the "New York City Human Resources Administration Authorization for the Coordinated Assessment Survey (CAS) and/or Supportive Housing Application" consents. I also verify that these two consents have been signed within the last 180 days authorizing the release of the applicant's health information, including his or her medical, mental health, HIV-related, alcohol and substance use treatment, Cash Assistance, Supplemental Nutritional Assistance Program and prior supportive housing/coordinated assessment records and that my agency has on file the original form signed by the applicant.

Consent Date: *

Verified By:

Location Kept: *

DHS CARES ID: * No Cares ID.

First Name: * Last Name: * Social Security #:

Date of Birth: * Age: Gender: *

CIN/Medicaid #: Case Number:

I attest to the best of my knowledge this client does not have a Social Security Number or CIN/Medicaid Number.

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Note: If you select that your client does not have a Social Security Number or Medicaid Number, there will be no Client Documents, Prior Survey, or Prior Supportive Housing Application returned.

New Survey ~ Search Results ~ Client Documents

By clicking on Client Documents, you expand the HRA Viewer Documents section that will show the matches in the system for Birth Certificate, Social Security Card, Photo ID, and income documents. You must click on Client Documents in the Search Results to continue completing a survey.

UAT Environment

Search Results

Client Documents

[+] HRA VIEWER DOCUMENTS

PRIOR SUBMITTED SURVEYS WITHIN THE LAST 6 MONTHS

Show 10 entries Search:

Name (LN, FN)	Survey #	Survey Date	Entered By	Agency/Site	Housing Programs
No data available					

Showing 0 to 0 of 0 entries Previous Next

[-] PRIOR SUPPORTIVE HOUSING APPLICATIONS WITHIN THE LAST 5 YEARS

Show 10 entries Search:

Referral Date	NY/NY I & II	NY/NY III	NYC 15/15	General Population	Vulnerability Assessment	SMI Housing	Levels	Type	Approval Period	Referring Agency Name/Site	Placement Agency Name/Site	Move In Move Out	Reason Moved
No data available													

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In this screenshot, there is a list of important documents that were returned in the Client Documents. The type of document is under the Document Description column. Click on the different documents – Birth Certificate, Social Security Card, and Photo ID – to open an image of that document.

The screenshot shows a web browser with three tabs: 'CAPS | Submitted Surveys', 'CAPS', and 'CAPS | New Assessment'. The page title is 'Coordinated Assessment Survey' and it is in the 'UAT Environment'. A search bar is visible at the top right. On the left, a navigation menu includes 'Home', 'New Survey', 'Consent/Search (Completed)', 'Household/Veteran Status (Incomplete)', 'Housing/Homeless Status', 'DV/Health', 'Employment/Income', 'Legal', 'Resources/Housing Approvals', 'Housing Programs', 'Pending Surveys', 'Submitted Surveys', 'Housing Resources', and 'Survey Tutorial'. The main content area is titled 'Search Results' and contains a 'Client Documents' section. Below this is a table of 'HRA VIEWER DOCUMENTS' with columns for 'Document Description', 'CIN', 'CASE #', and 'Entry Date'. A yellow arrow points to the 'Birth/Hospital Certificate' row. A text box next to the arrow contains the instruction: 'Click on the description of the document. An image of the document will display. This document can be saved for use in applications for housing.'

Document Description	CIN	CASE #	Entry Date
Birth Certificate Bureau of Vital Statistics			03/20/2019
Birth Certificate Bureau of Vital Statistics			11/12/2004
Birth/Hospital Certificate			07/13/2017
Birth/Hospital Certificate			12/07/2016
Birth/Hospital Certificate			12/07/2016
Birth/Hospital Certificate			12/02/2011
CBIC-Common Benefit Identification Card			11/12/2004
Medicaid Card			12/18/2003
Other Acceptable ID			03/20/2019
Photo ID any source			07/13/2017
Social Security Card			03/20/2019

Completing New Survey ~~ Client Documents


While you are completing the survey, there is a Client Documents icon that can be selected at any time in the header of the client's survey. Information in the documents returned may be useful for completing the survey.

The screenshot displays the 'Coordinated Assessment Survey' interface in the 'UAT Environment'. The header includes the NYC Human Resources Administration logo, the survey title, and a 'Logout!' link. A navigation menu on the left lists various survey sections, with 'Household/Veteran Status' currently selected. The main content area is titled 'Household Composition' and contains several form fields: Client Mailing Address, Apartment #, City, State, Zip, Care of First Name, Care of Last Name, Client Phone, Client Email, Household Composition (with a 'Select One' dropdown), and Number of children in household under 18 (with a 'Select One' dropdown). In the top right corner of the main area, there is a 'Client Documents' icon (a document with a red 'X') and a progress indicator showing '0% Complete'. A yellow arrow points to the 'Client Documents' icon, and a red-bordered box with the text 'Click on Client Documents.' is positioned below it. At the bottom of the form, there are 'Save' and 'Home' buttons on the left, and '<< Previous' and 'Next >>' buttons on the right. The footer contains the copyright notice: '2021 © MIS / NYC Human Resources Administration, All rights reserved.'

Pending Surveys ~~ Client Documents ~~ PDF Symbol

Saved surveys in the Pending Survey list will have the Client Documents. Click on the PDF symbol to display a list of client documents.


The screenshot shows a web browser window with three tabs: 'CAPS | Submitted Surveys', 'CAPS', and 'CAPS | Pending Surveys'. The application header includes the NYC Human Resources Administration logo, the title 'Coordinated Assessment Survey', and the text 'UAT Environment'. A sidebar on the left contains navigation links: Home, New Survey, Pending Surveys (selected), Submitted Surveys, Housing Resources, and Survey Tutorial. The main content area displays a table titled 'PENDING SURVEYS (1)'. The table has columns for Name (LN, FN), Survey #, Survey Date, Entered By, Agency/Site, DOB - Age, SSN #, Client Documents, CIN/Medicaid#, HRA OPTIONS ID, and CARES ID. A single row is visible with a PDF icon in the Client Documents column. Below the table, it says 'Showing 1 to 1 of 1 entries' and includes 'Previous', '1', and 'Next' navigation buttons. A red 'Exit' button is located below the table. A yellow arrow points from a text box at the bottom to the PDF icon. The text box contains the instruction 'Click on Client Documents.' The footer of the page reads '2021 © MIS / NYC Human Resources Administration, All rights reserved.'

Name (LN, FN)	Survey #	Survey Date	Entered By	Agency/Site	DOB - Age	SSN #	Client Documents	CIN/Medicaid#	HRA OPTIONS ID	CARES ID
		11/29/2021		2005/004						

Submitted Surveys ~~ Client Documents ~~ PDF Symbol

Completed surveys in the Submitted Survey list will have the Client Documents. Click on the PDF symbol to display a list of client documents.

The screenshot shows a web browser window with three tabs open, all titled 'CAPS | Submitted Surveys'. The browser address bar is empty. The page header includes the NYC Human Resources Administration logo, the title 'Coordinated Assessment Survey', and a 'UAT Environment' status indicator. A navigation sidebar on the left contains links for Home, New Survey, Pending Surveys, Submitted Surveys (selected), Housing Resources, and Survey Tutorial. The main content area displays a table of submitted surveys. The table has columns for Name (LN, FN), Survey #, Survey Date, Entered By, Agency/Site, Client Documents, HRA Supportive Housing Application, and Housing Programs. A single survey entry is visible with a date of 06/29/2021 and Agency/Site of 2005/004. A PDF icon is present in the Client Documents column. A yellow arrow points to this icon. Below the table, it says 'Showing 1 to 1 of 1 entries (filtered from 6 total entries)'. There are 'Previous', '1', and 'Next' buttons. An 'Exit' button is in the bottom left, and '<< Previous' is in the bottom right. A footer at the bottom reads '2021 © MIS / NYC Human Resources Administration, All rights reserved.'

Name (LN, FN)	Survey #	Survey Date	Entered By	Agency/Site	Client Documents	HRA Supportive Housing Application	Housing Programs
		06/29/2021		2005/004			Supportive Housing Programs NYC 15/15 - Young Adult CITY/State Housing Programs DHS General Population

Showing 1 to 1 of 1 entries (filtered from 6 total entries)

Previous 1 Next

Exit << Previous

Click on Client Documents.

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Submitted Surveys ~~ Client Documents ~~ PDF Symbol ~~ HRA Viewer Documents Pop Up

In this screenshot, there is a list of important documents that were returned in the Client Documents. The type of document is under the Document Description. Click on the different documents – Birth Certificate, Social Security Card, and Photo ID – to open an image of that document.

SSN #: DOB: Last Name/First Name:

[-] HRA VIEWER DOCUMENTS

Show entries Search:

Document Description	CIN	CASE #	Entry Date
Birth Certificate Bureau of Vital Statistics			03/20/2019
Birth Certificate Bureau of Vital Statistics			11/12/2004
Birth/Hospital Certificate			07/13/2017
Birth/Hospital Certificate			12/07/2016
Birth/Hospital Certificate			12/07/2016
Birth/Hospital Certificate			12/02/2011
CBIC-Common Benefit Identification Card			11/12/2004
Medicaid Card			12/18/2003
Other Acceptable ID			03/20/2019
Photo ID any source			07/13/2017
Social Security Card			03/20/2019
Social Security Card			07/13/2017
Social Security Card			12/07/2016
Social Security Card			12/07/2011

Close 1 Next