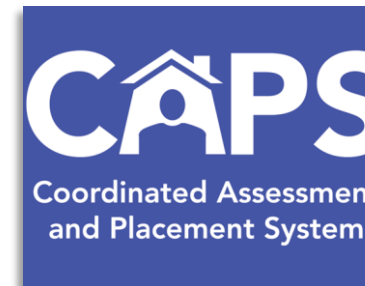


Referral Request Queue (RRQ)

December 15, 2022



Welcome!

- All participants will be on mute.
- Use the Chat for questions/comments
- We are recording!
- Slides will be shared
- All user access/technical CAPS issues should be directed to:
hracassupport@hra.nyc.gov

CAPS Training

Description:

The training will provide an overview of the Referral Request Queue (RRQ) function for supportive housing providers. We will review navigation in CAPS and learn how to make a referral request for vacant units to HRA OSAHS.

Aim:

Housing Providers will learn how to request a referral for vacant supportive housing units, monitor progress on the request, and enter interview outcomes.

Agenda

- Welcome
- Keep In Mind
- Demo in CAPS
- Instructions/Review Referral Request Process
- Monitor Process
- Communication with OSAHS
- Additional Training Opportunities
- Q&A

Keep in Mind

- The RRQ function went live effective 11/01/22!
- RRQ shows processes that are happening in real time.
- RRQ is for re-rental of vacant supportive units only.
- HRA Office of Supportive/Affordable Housing and Services (OSAHS) is currently the only placement agency utilizing RRQ.
- The RRQ function is the new way for Housing Providers (HP's) to request referrals for vacant supportive housing units. There will still be communication between HRA and HPs outside of CAPS to effectively execute on the entire placement process.
- HPs are required to enter interview outcomes within 2 business days of interview. Move ins are required to be entered in real time.

Demo of the RRQ function



Before Making a Referral Request...

1. Ensure your **Unit Roster** information is correct in CAPS. All moves in and out must be current in CAPS.
2. Ensure **Unit Details** – both service contract eligibility and rent subsidy – **for the unit you will be requesting a referral** are correct.

NOTE: If HPs need to make any corrections to unit roster or specific unit, these must be corrected/coordinated with HRA Coordinated Entry before requesting a referral.

Unit Roster

Go to VCS → Unit Roster to Request a Referral.

Click the 3 red dots button/ Action column next to an online unit.

Select **Request Referral** from Action drop down.

This option only appears for **online supportive housing units**.

The screenshot shows the 'Unit Roster' interface for 'PACTQA New Environment'. At the top, there are filters for Site Name (2005/006-ANA GONZALEZ APARTMENTS), Site Address (880 WILLOUGHBY AVENUE, BROOKLYN, NY 11221), and Primary Service Contract (ALL). Below these are various filter fields for Unit Name, Unit features, Contracting Agency, Rental Subsidies, Unit Status, and Unit Type. There are 'Add' and 'Clear' buttons. The main part of the interface is a table with columns: Actions, Primary Service Agreement, Contracting Agency, Unit Name, Unit Type, Unit Status, Unit Features, and Rental Subsidies. A dropdown menu is open for the first row, showing options: Edit Unit, Delete Unit, and Request Referral. The 'Request Referral' option is highlighted with a red box. The table contains several rows of unit data, including unit names like '1W', '2B', '3J', '4A', '4C', and '4E', and their respective features and subsidies.

Actions	Primary Service Agreement	Contracting Agency	Unit Name	Unit Type	Unit Status	Unit Features	Rental Subsidies
⋮	SMI :: Singles	DHS/HRA SRO	1W	SRO Suites-Individu...	Unit-Online	Private Kitchen-Yes, Private Bathr...	HPD-HUD COC Rental Subsidy
Edit Unit	Units ::	DHS/HRA SRO	2B	SRO Suites-Individu...	Unit-Online	Private Bathroom-Yes, Private Kitc...	NONE
Delete Unit	Population ::	DHS/HRA SRO	3J	SRO Suites-Individu...	Unit-Online	Private Kitchen-Yes, Private Bathr...	HUD COC Rental Subsidy
	Population ::	DHS/HRA SRO	4A	SRO Suites-Individu...	Unit-Online	Private Bathroom-Yes, Private Kitc...	HUD COC Rental Subsidy
	Units ::	DHS/HRA SRO	4C	SRO Suites-Individu...	Unit-Online	Private Bathroom-Yes, Private Kitc...	NONE
	Community Units ::	DHS/HRA SRO	4E	SRO Suites-Individu...	Unit-Online	Private Bathroom-Yes, Private Kitc...	NONE

Complete the Referral Request Form

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.

HP Verifies & Transmits.

OSAHS staff will contact within one (1) business day of HP's request.

Referral Request

PACTQA New Environment

Housing Provider Details:

Agency No-Name: 2005 - CAMBA Agency Address: 1720 CHURCH AVE., BROOKLYN, NY 11226 Site Type: Congregate Site
Site No-Name: 006 - ANA GONZALEZ APARTMENTS Site Address: 880 WILLOUGHBY AVENUE, BROOKLYN, NY 11221 Site Features:

If you need to make any changes to the above details, please exit the form and contact your HRA TAD Liaison

Unit Details:

Unit Name: 1W DHS/HRA SRO: Yes Primary Service Contract Type: SMI Singles
HUD Chronic: Yes Unit Type: SRO Suites-Individual Apartments Wheelchair Accessible: No
Rental Subsidy: HPD-HUD COC Rental Subsidy Unit Address:

If you need to make any changes to the Unit details, exit the form and click 'Edit Unit' from action column on the Unit Roster to make updates

Interview Contact Information:

Name of the Contact for Interview: Anusha Kuruganti
Phone: 121-212-1212
Extension: 12345
Email: test@org.goom

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

Additional Contract Requirements for this unit:

Test

(Maximum entry of 250 characters. 240 characters remaining)

Additional Contract Requirements Updated By / Date

No Rows To Show

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

Verify & Transmit Exit

Referral Request Information is Populated from Unit Roster

Transmitted Requests

Shows the referral requests submitted to OSAHS.

If you make a request in error, you may withdraw the 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.

Request Referral Queue – Transmitted Tab

NYC Human Resources Administration Department of Social Services CAPS Coordinated Assessment and Placement System

Referral Request Queue QA Environment NYC 15/15 Research Consents

Agency: 2005 - CAMBA Site: All

Pending Schedule: 1 Scheduled: 1 Withdrawn Requests: 0 Cancelled Requests: 0 Referrals Completed: 2

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	Wheelchair Accessible	HUD Ch
View Referral Request Withdraw Referral Request	12/05/2022	2005 - CAMBA	006 - ANA GONZALEZ AP...	880 WILLOUGHBO...	SMI Singles	HPD-HUD COC Renta...	1W	SRO Suites-Ind...	No	Yes

1 to 1 of 1 < > Page 1 of 1

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HRA Scheduling Vacancy

OSAHS staff will email HPs within one (1) business day of submitted referral request.

An email will be sent to the contact person on the initial request.

The contact person must be able to schedule interviews.

The following information will be requested to schedule each interview/apt viewing:

- › Name of person conducting interview
- › Email of contact
- › Phone number (for day-of-interview contact)
- › Dates for interview
- › Times for interview
- › In person or remote
- › If remote, platform and link
- › If in person- address

Note: HRA needs 7-10 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.

Pending Referrals

Requests move to the Pending tab when scheduling has been coordinated with the provider and completed by OSAHS.

The Interview Slots column in the Pending tab will have the date and times you have coordinated and confirmed with OSAHS.

Request Referral Queue – Pending Tab

The screenshot displays the 'Referral Request Queue' interface in the 'Pending' tab. The top navigation bar includes the NYC logo, 'Human Resources Administration Department of Social Services', and 'CAPS Coordinated Assessment and Placement System'. The main header shows 'Referral Request Queue' and 'QA Environment'. Below the header, there are filters for 'Agency: 2005 - CAMBA' and 'Site: All'. A summary bar indicates: 'Pending Schedule: 0', 'Scheduled: 1', 'Withdrawn Requests: 0', 'Cancelled Requests: 0', and 'Referrals Completed: 0'. A tabbed interface shows 'Transmitted', 'Pending' (highlighted with a red box), and 'Completed'. A table lists referral requests with columns: Action, Transmitted Date, Agency No / Agency Name, Site No / Site Name, Site Address, Primary Service Contract, Rental Subsidies, Unit Name, Unit Type, and Interview Slots. A red box highlights the table header, and a red arrow points to the right edge of the table, indicating that the 'Interview Slots' column is currently hidden. Below the table, a button labeled 'Interview Slots' is shown, which is also highlighted with a red box. A red line connects this button to the right edge of the table header. The footer contains 'City of New York 2020 All Rights Reserved.' and 'NYC.GOV.Page | Support'.

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

Completed Requests

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.

Referral Request Queue – Completed Tab

The screenshot shows the 'Referral Request Queue' interface in the CAPS system. The header includes the NYC logo, 'Human Resources Administration Department of Social Services', the CAPS logo, and 'Coordinated Assessment and Placement System'. The page title is 'Referral Request Queue' and it is in a 'QA Environment'. The agency is '2005 - CAMBA' and the site is '038 - KING GARDENS - NY/NY III POP A'. 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 box. Below the summary is a table with columns: Action, Transmitted Date, Referral Request Status, Agency No / Agency Name, Site No / Site Name, Site Address, Primary Service Contract, Rental Subsidies, and Unit Name. A single row is visible with the following data: Action (three dots), Transmitted Date (11/22/2022), Referral Request Status (Referral Transmitted), Agency No / Agency Name (2005 - CAMBA), Site No / Site Name (038 - KING GARDENS - N...), Site Address (211 RIVERDALE A...), Primary Service Contract (NY/NY III POP A), Rental Subsidies (Section 8 - HPD), and Unit Name (3M). At the bottom, there is a section for 'Cancelled / Withdrawn Referral Requests' which is currently empty. The footer contains 'City of New York 2020 All Rights Reserved.' and 'NYC.GOV Page | Support'.

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		

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 within 2 days of the date interview is conducted.

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.

VCS → Referral Roster

The screenshot displays the NYC CAPS Coordinated Assessment and Placement System dashboard. The navigation menu on the left includes 'Vacancy Control System' and 'Referral Roster', both highlighted with red boxes. The main content area features a 'Survey / Application' section with links for 'New Survey', 'Pending Surveys', 'Submitted Surveys', and 'Pending Applications'. Below this is the 'Vacancy Control System' section, which includes a 'Referral Roster' link highlighted with a red box. The 'Stats' section shows a table of 'Vacancy Stats' for '001 - THE GATHERING P...' with columns for 'Total Units', 'Occupied', 'Online', and 'Offline', all showing a value of 0. The 'Announcements' section contains a notice dated Nov 28, 2022, regarding the discontinuation of the Request a Referral form and email box as of 12/31/22, and the requirement to use the Referral Request feature from Actions in the Unit Roster.

Vacancy Stats	Select One of the Site: 001 - THE GATHERING P...
Total Units	0
Occupied	0
Online	0
Offline	0

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

Questions to be answered are:

→ Was interview conducted?

→ If so, what was the outcome?

If you select Pending Approval – you should return to the referral to update property management details.

Referral Roster → Entering Interview Outcomes

The screenshot displays the NYC CAPS (Coordinated Assessment and Placement System) interface. The header includes the NYC logo, Human Resources Administration, Department of Social Services, and CAPS logo. The main content area shows a 'Referral Roster' for Agency: 2005 - CAMBA and Site: 038 - KING GARDENS - NY/NY III POP A. The interface includes a navigation bar with 'Pending' and 'Completed' tabs, and a summary row showing: Pending: 3, Overdue: 0, Accepted/Pending Approval: 1, In Progress: 1, Move-In: 32, and Not Accepted: 17. Below this is a table of referrals with columns for Action, Status, Referral Type, Referring Agency/Site, Housing Agency/Site, Eligibility, Prioritization, Service Needs, Placement Criteria, Primary Service Contract Type, and Unit. A red box highlights the 'Update Outcome' button in the 'Action' column of a row with status 'Pending Approval'.

Action	Status	Referral Type	Referring Agency/Site	Housing Agency/Site	Eligibility	Prioritization	Service Needs	Placement Criteria	Primary Service Contract Type	Unit
⋮	Pending	Regular Referral	1060 - DEPARTMENT OF C...	2005 - CAMBA / 038 - KIN...	SMI Singles; N...	High	Community Care; L...	[Borough Preferences]; ...	NV/NY III - POP A	
📁	Application Package	ular Referral	9022 - BREAKING GROUND...	2005 - CAMBA / 038 - KIN...	SMI Singles; N...	Low	Community Care; L...	[Borough Preferences]; ...	NV/NY III - POP A	
📄	Update Outcome	ular Referral	6179 - PROJECT RENEWAL ...	2005 - CAMBA / 038 - KIN...	SMI Singles; N...	Medium	Community Care; L...	[Borough Preferences]; ...	NV/NY III - POP A	
⋮	Pending Approval	ular Referral	9022 - BREAKING GROUND...	2005 - CAMBA / 038 - KIN...	SMI Singles; N...	Medium	Community Care; L...	[Borough Preferences]; ...	NV/NY III - POP A	One
⋮	Pending Approval	Regular Referral	6179 - PROJECT RENEWAL ...	2005 - CAMBA / 038 - KIN...	SMI Singles; N...	Medium	Community Care; L...	[Borough Preferences]; ...	NV/NY III - POP A	One

Client completed supportive service provider 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.

Interview Outcome = **Accepted / Pending Approval**

The screenshot shows a form with the following fields:

- Was Interview Conducted:** Yes
- Interview Outcome:** Pending Approval (highlighted with a red box)
- Reason:** (specify details in the below Comments field)
- Comments:** (empty text area)
- Checkboxes:**
 - Income documents
 - SH Application documents
 - Property Management / Leasing Interview
 - Criminal background check
 - Credit Check
 - Unit Viewing

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.

Interview Outcome = **Accepted / Pending Move-In**

Was Interview Conducted:	Yes
Interview Outcome:	Accepted
Placement Outcome:	Pending Move In
Expected Move In-Date:	MM/DD/YYYY
Unit Number:	Select
Comments:	Enter Comments here...

(Maximum entry of 750 characters; 750 characters remaining)

Monitor 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

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:

Nyasha Olliver ollivern@hra.nyc.gov

Alathia Barnett barnettal@hra.nyc.gov

Updates and Requirements

- Effective January 1, 2023, the RRQ will be THE method for requesting a referral.

(The Request Referral email box will be removed)

- **Outcomes for interviews are required for ALL clients referred within 2 business days of the interview date**
- OSAHS Staff will share the interview outcomes with client's case manager(s)
- 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

Stay Tuned

Virtual Office Hours will be held by OSAHS and Coordinated Entry for assistance with the referral request process:

Jan 10th 10 a.m. to 11 a.m.

Jan 24th 10 a.m. to 11 a.m.

Request Referral Process Recap

Unit 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.

OSAHS Staff will contact this person to schedule interviews.

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.

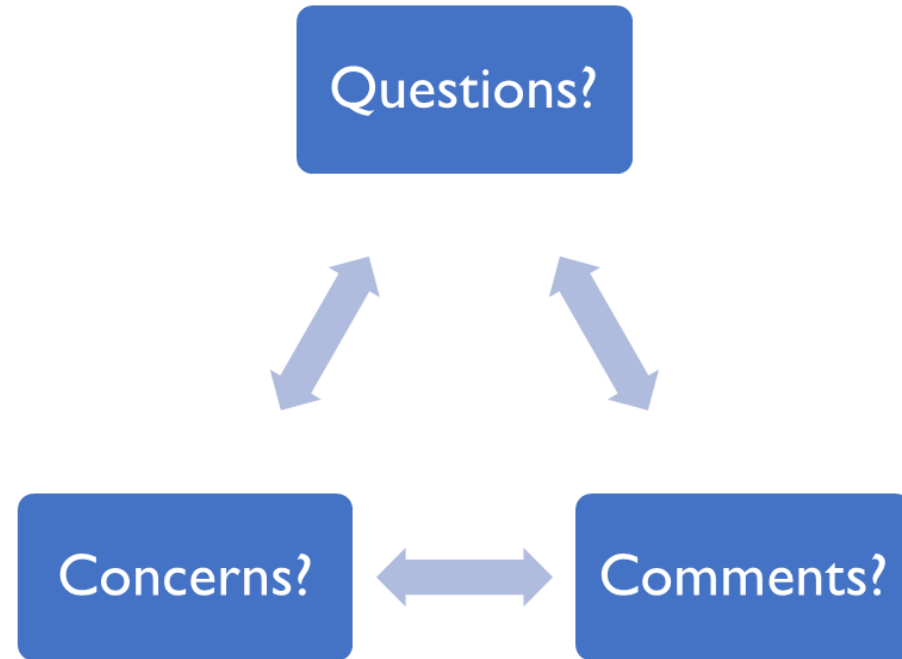
OSAHS Communication →

OSAHS Contacts are available to help you at each step of RRQ

Monitor Referrals →

Review agency procedures for optimal utilization of CAPS Referral Request

Q & A



Thank you!

