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

Module Five – Completing the Turn Around Document (TAD)

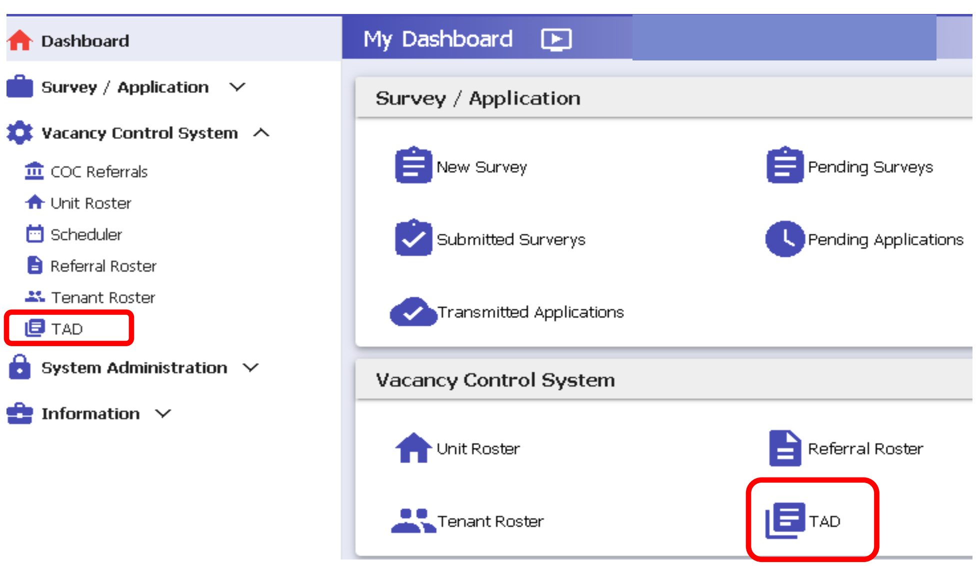
IMPORTANT

- **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

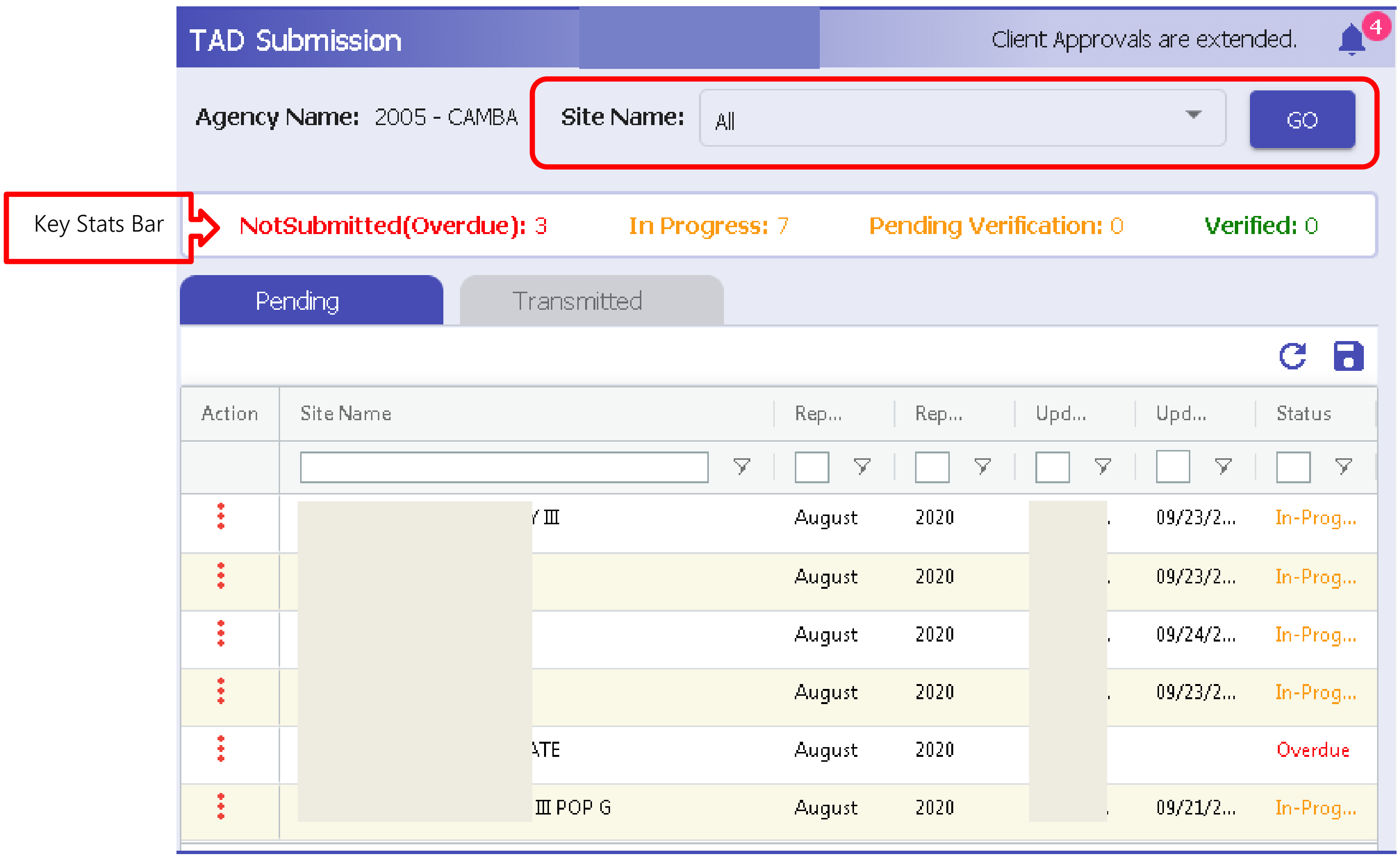
Turn Around Documents (TADS) are reporting documents, submitted to HRA, which track occupancy in supportive housing programs. **They are due by the 10th day of every month.** When submitting TADS there are three components to complete: The *Unit Roster*, *Referral Roster*, and *Tenant Roster*. Once a component is completed the system directs you to the next incomplete roster.

Users can access the TAD via the Vacancy Control System (VCS) from either the left navigational menu, or the dashboard's main screen. You will be routed to the **TAD Submission** screen.

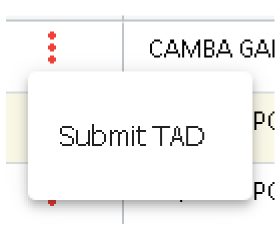


Here, first select the site for which you are completing the TAD. You may select **All** or choose a specific site.

The Key Stats bar indicates what TADS you have in your queue. Pending TADS are a combination of TADS with the status of **Not Submitted** and **In Progress**. Each should have a tally that reflects the chart below it.

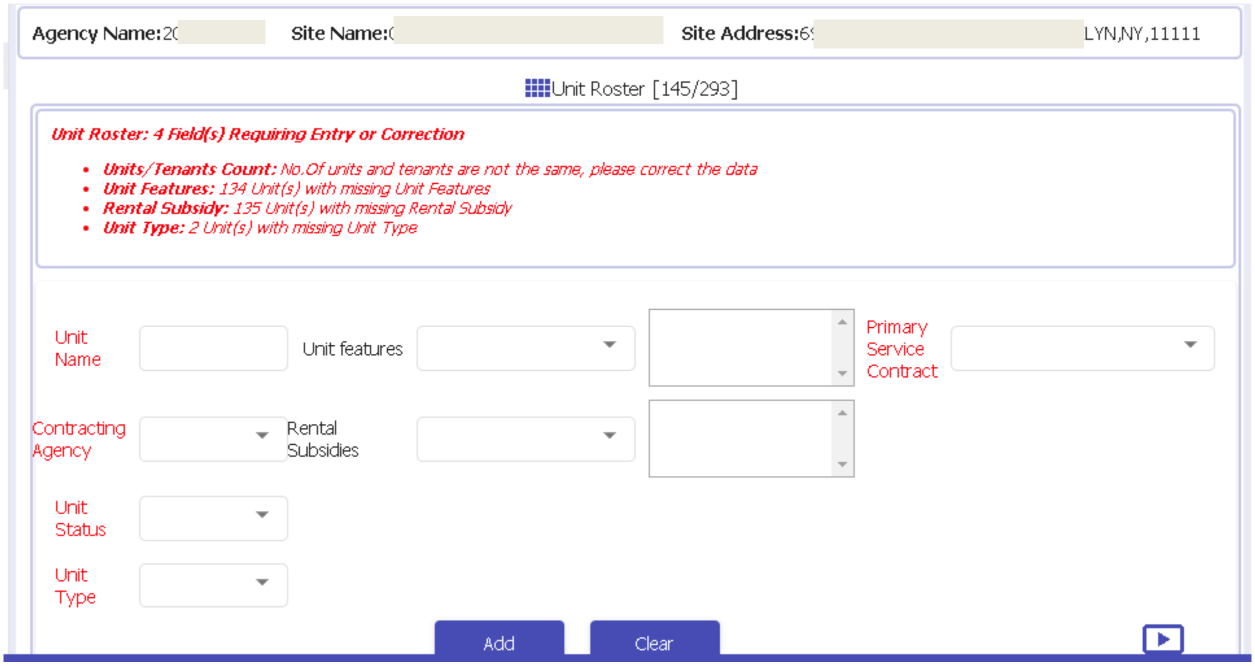


Clicking on the ellipsis (⋮) in the Action column on the row of the selected site will produce the pop-up menu item **Submit TAD**. Selecting it brings you to the unit roster.

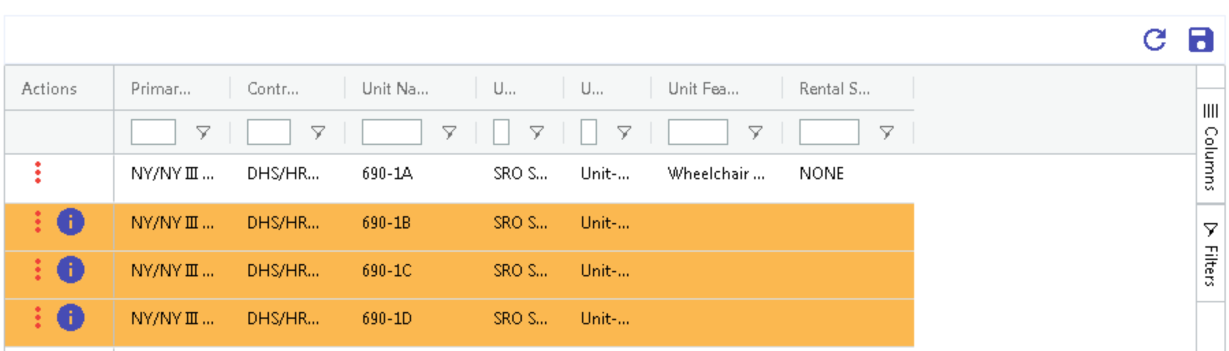


UNIT ROSTER

The box in the screenshot below indicates, in red, the information you need to complete in order to submit your TAD.



Scroll down on your screen to see the incomplete units, highlighted in orange. Hover your mouse over the information icon ( ) to see what specific information is required.



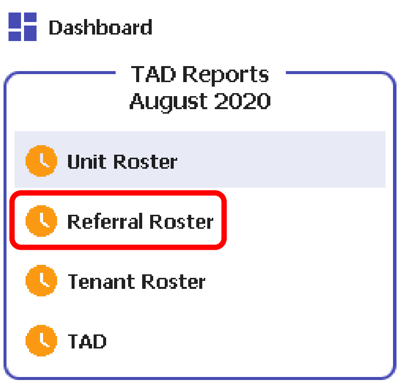
Then click the ellipsis ( ) and select **Edit Unit**. <u>Scroll back to the top part of the screen</u> to fill in the fields with the missing information.

Once you complete all required information, you will be directed to the Referral Roster.

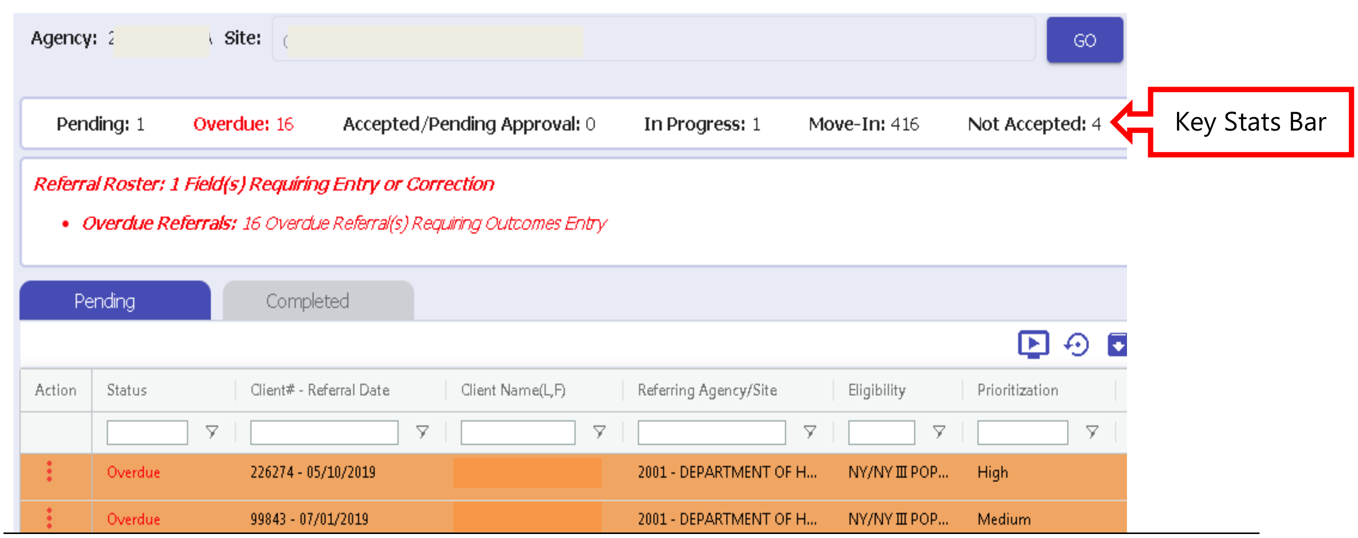
REFERRAL ROSTER

Note: If one of the units on your roster is occupied, you will not be able to edit it. A pop-up message displays in the top right corner of the screen with this alert.

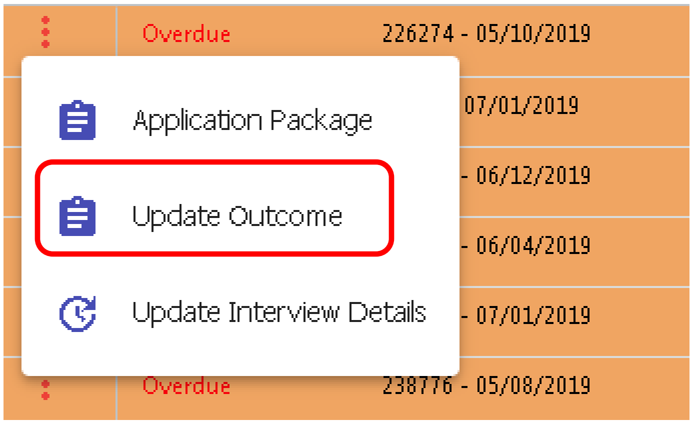
***Temporarily* this will not stop you from submitting a TAD**. Simply update the missing information when the unit becomes vacant. However, when you encounter this situation, you must manually navigate to the Referral Roster from the left navigational column, or click **Next** to be redirected there.



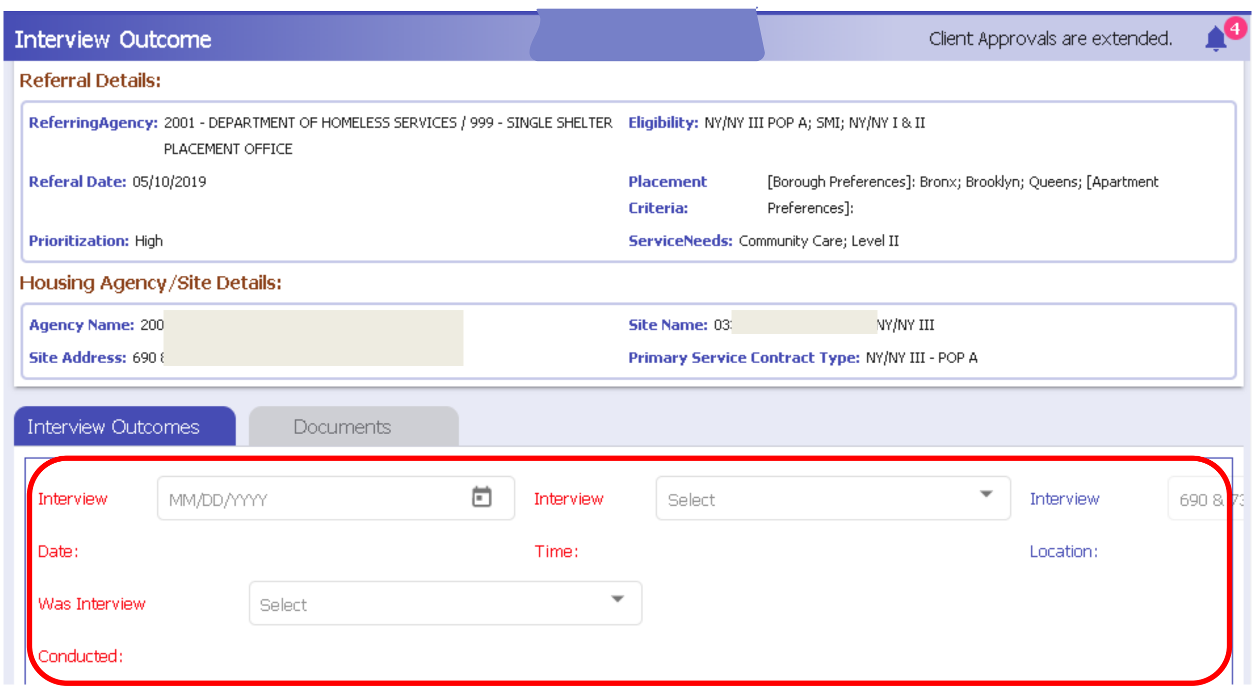
The Key Stats Bar on the Referral Roster screen indicates critical information about this site. The Validation message in red summarizes what is due. Each row of the chart highlighted in orange must be completed.



Click on the ellipsis for each to enter necessary information. Select **Update Outcome** from the action menu.



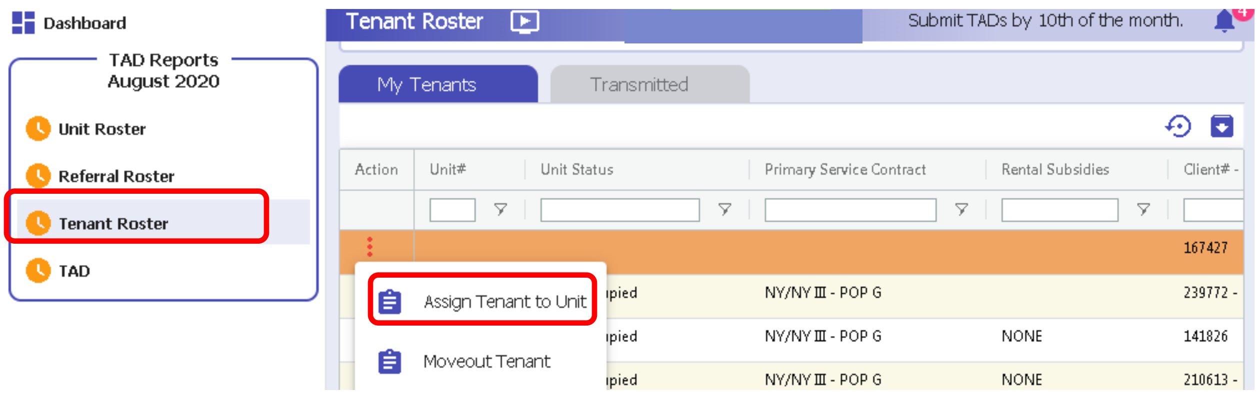
Complete all required fields and press **Transmit**.



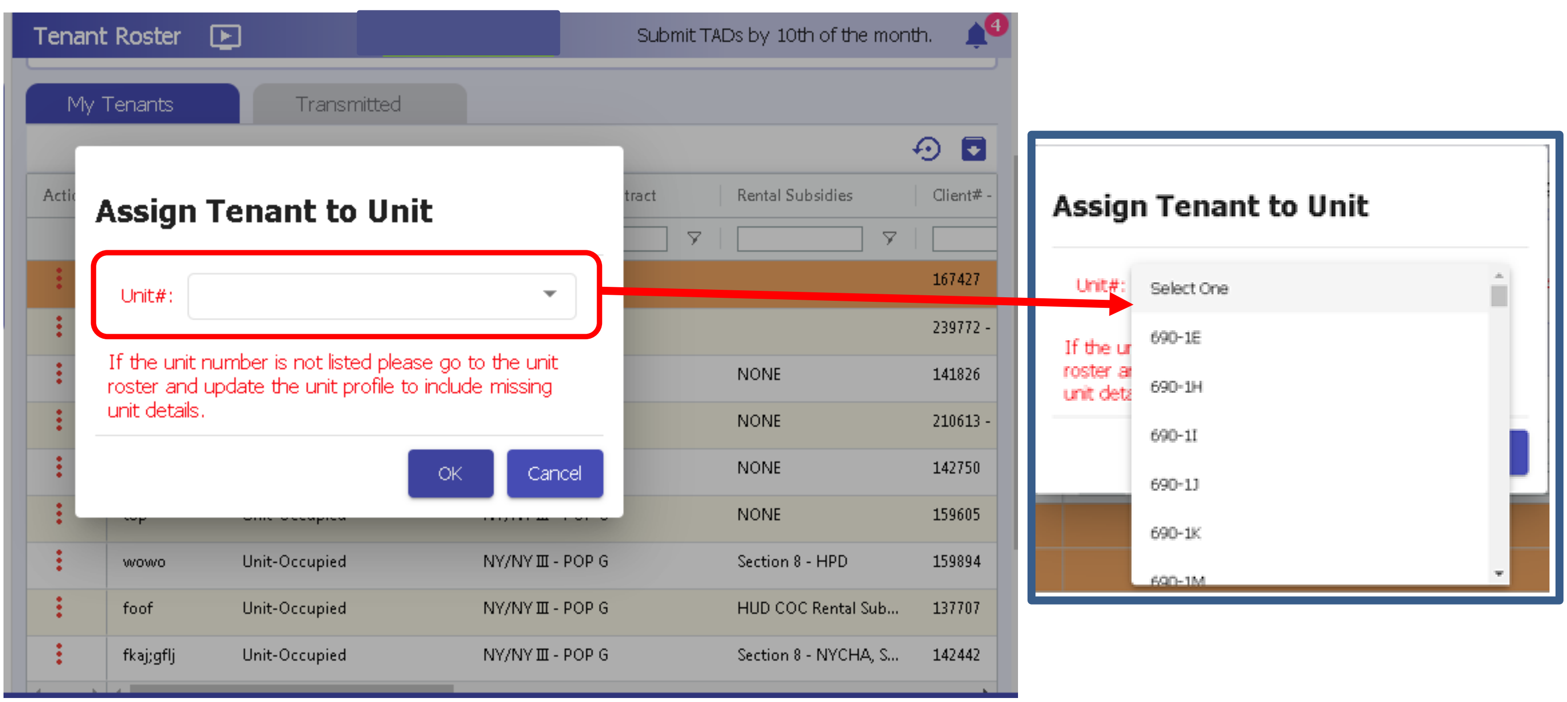
Once you transmit, the Key Stats banner updates with the correct number overdue remaining.

TENANT ROSTER

From the ellipsis, select Assign Tenant to Unit.

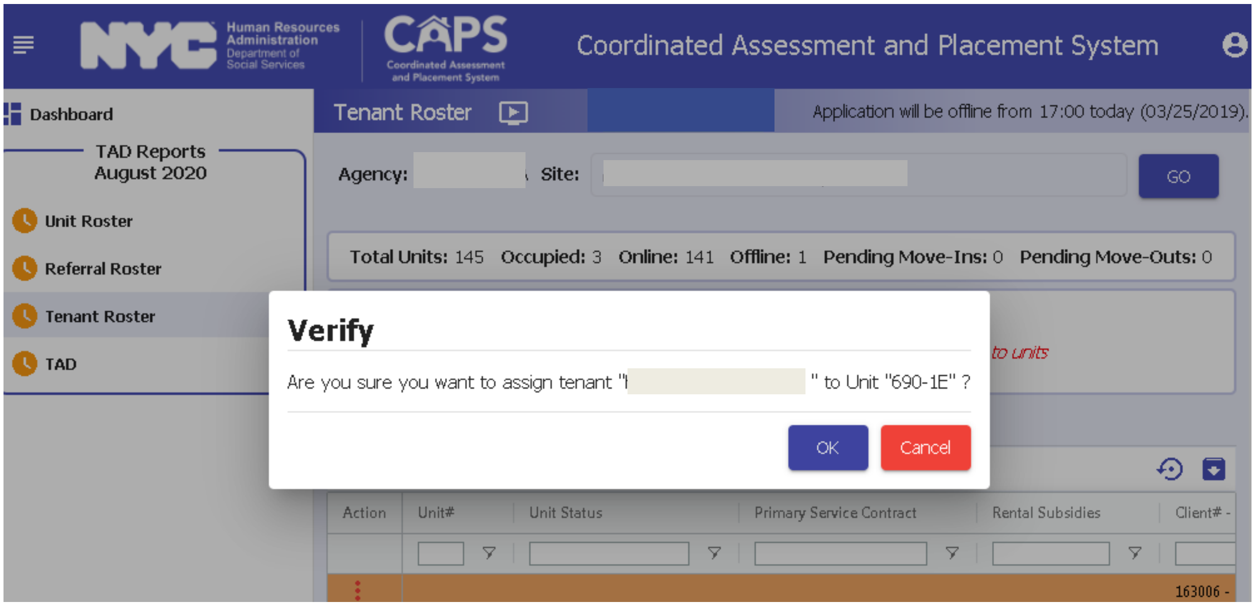


A pop-up box will display. Select the intended unit from the drop-down menu in the box and click **OK**.



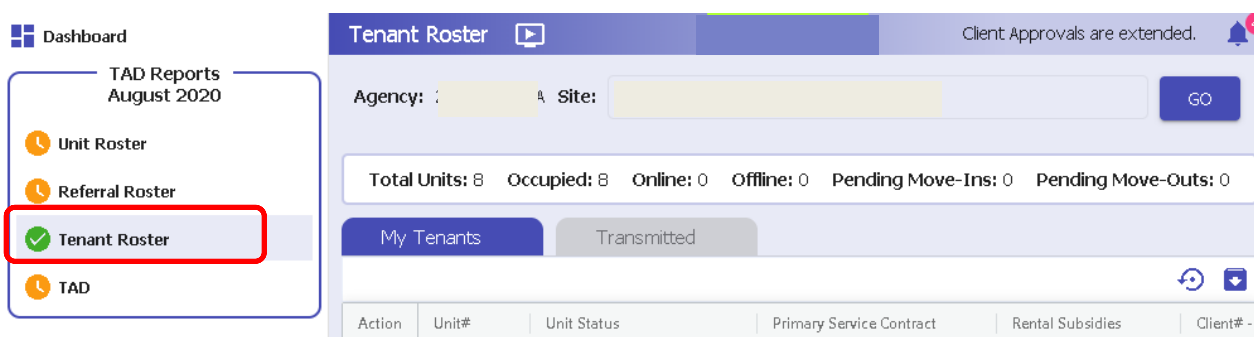
Note: For Congregate Sites enter the unit name as it appears in your building. For Scatter Sites you may designate 'to be provided' and update later, once the unit is identified.

Verify that you are assigning the intended tenant to the chosen unit. Click **OK**.



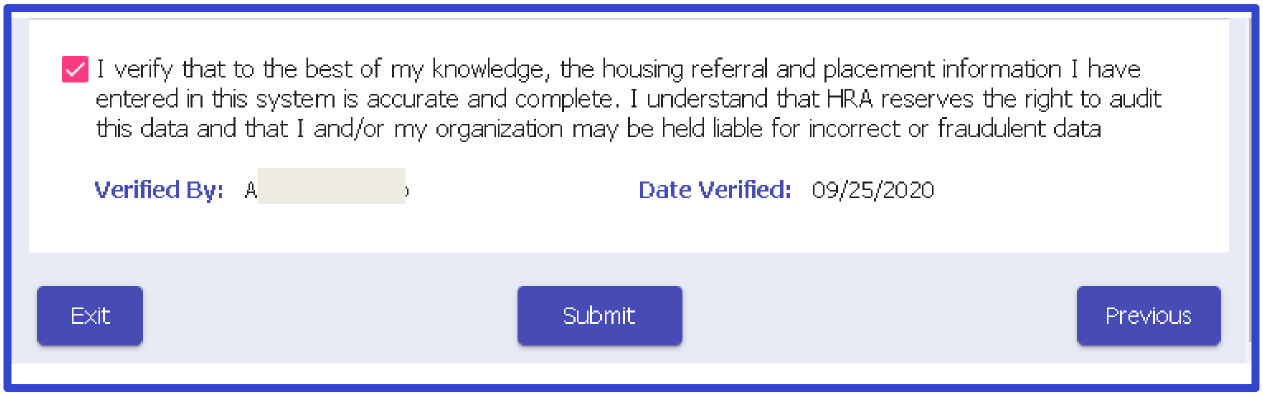
Continue in this manner until all tenants are assigned to their appropriate units.

Once your tenant roster is complete, it will have a green check mark beside it in the left navigational menu. You may now submit your TAD.



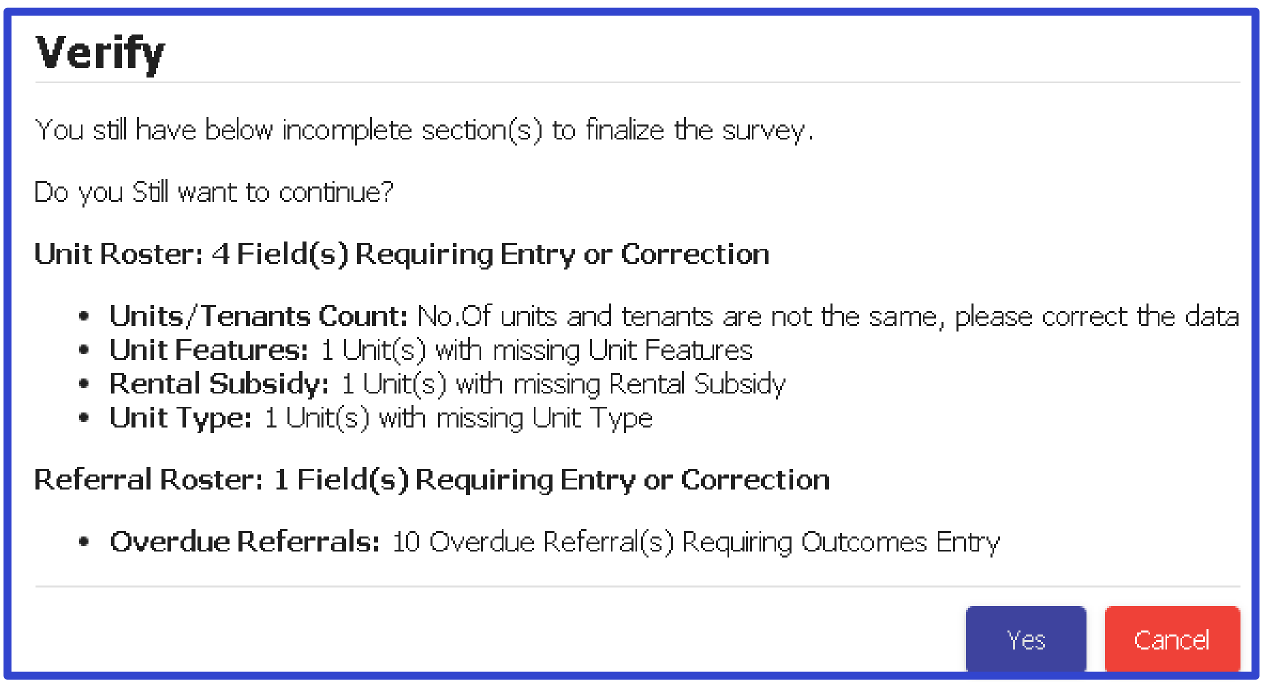
Note: You *will* be able to submit a TAD without a green check mark for each roster. However, your ultimate goal is to have all information complete for each unit, referral, and tenant roster so that all have green check marks here. At an as yet unspecified future date, complete information on **all** rosters will be necessary for TAD submission.

With the tenant roster complete, you are ready to submit your TAD. Select TAD from the left-hand navigational menu. Scroll to the bottom of the screen to find the verification statement. Check the box to verify.

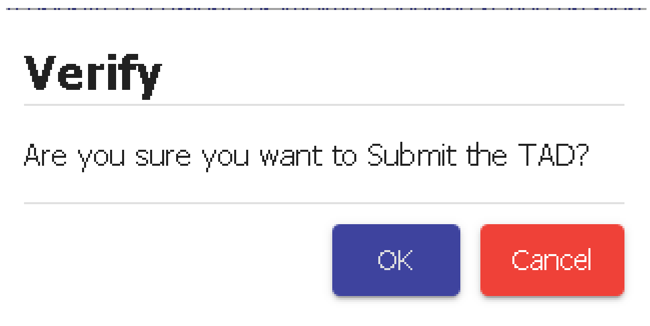


When you check the box, the **Submit** button appears. Click it to complete your TAD submission.

The verification message will display, indicating the status on missing information. Even though the rosters are incomplete, you are still able to submit. Click **Yes** to submit the TAD, or cancel to continue completing the rosters.

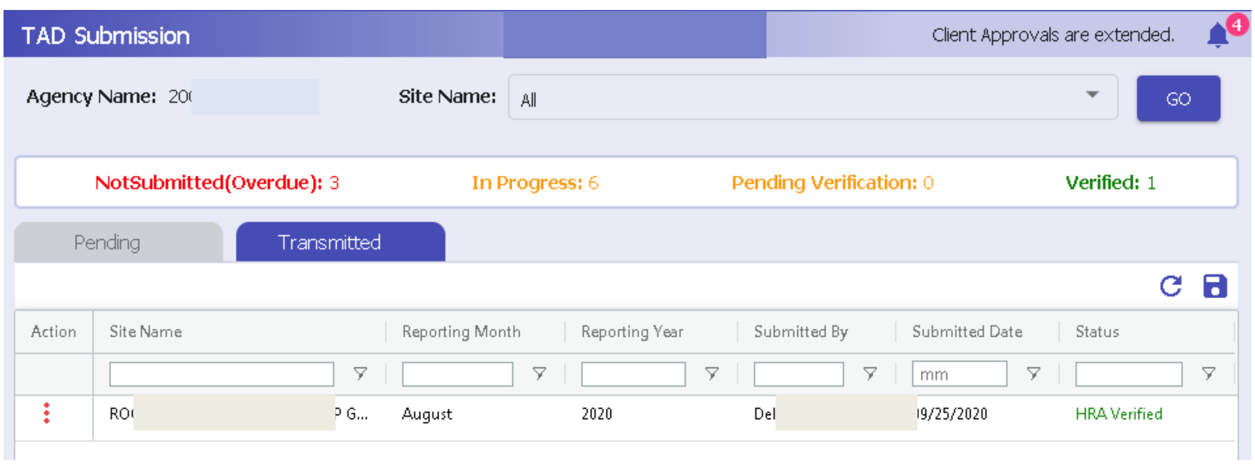


Selecting **Yes** triggers one last pop-up verification alert.



Click **OK**. The green message that you have submitted your TAD successfully appears in the top right-hand corner of your screen.

Returning to the TAD main page you can view all of your submitted TADS by clicking the **Transmitted** tab on the screen.



Once a TAD has been transmitted, you can see it in the **Transmitted** tab. TADS awaiting verification by the Coordinated Entry team will appear in the Pending Verification spot in the key stats bar. Once they have been verified by the Coordinated Entry Team, they will appear in the Verified spot on the key stats bar.