



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

### Module Five – Completing the Turn Around Document (TAD)

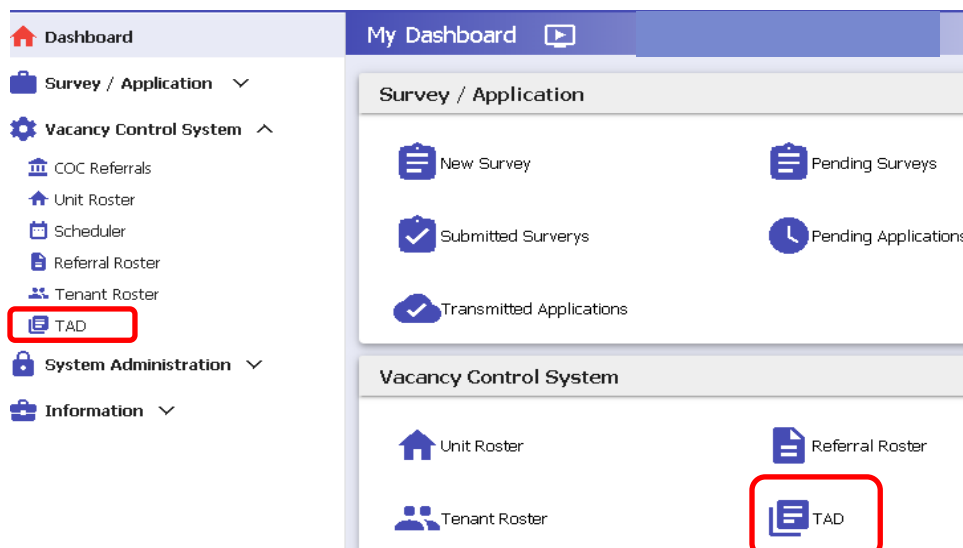
#### IMPORTANT

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

 **PASSWORD RESET:** Email [MISSECURITYADMIN@dss.nyc.gov](mailto: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 10<sup>th</sup> 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.



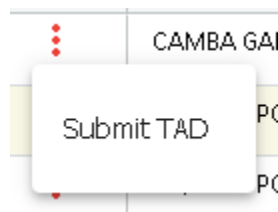
Here, first select the site for which you are completing the TAD. You may select **All** or choose a specific site.

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.

The screenshot shows the 'TAD Submission' interface. At the top, there is a header with 'TAD Submission' and a notification 'Client Approvals are extended.' with a bell icon and the number 4. Below the header, there are filters for 'Agency Name: 2005 - CAMBA' and 'Site Name: All' with a 'GO' button. A 'Key Stats Bar' is highlighted with a red box and an arrow, showing: 'NotSubmitted(Overdue): 3', 'In Progress: 7', 'Pending Verification: 0', and 'Verified: 0'. Below the stats bar, there are tabs for 'Pending' (selected) and 'Transmitted'. A table of pending TADs is shown with columns: Action, Site Name, Rep..., Rep..., Upd..., Upd..., and Status. The table contains six rows of data, with the first five rows having a status of 'In-Prog...' and the last row having a status of 'Overdue'. A red box highlights the 'Action' column, specifically the ellipsis icon (three red dots) in the first row.

Action	Site Name	Rep...	Rep...	Upd...	Upd...	Status
⋮	[REDACTED] / III	August	2020	[REDACTED]	09/23/2...	In-Prog...
⋮	[REDACTED]	August	2020	[REDACTED]	09/23/2...	In-Prog...
⋮	[REDACTED]	August	2020	[REDACTED]	09/24/2...	In-Prog...
⋮	[REDACTED]	August	2020	[REDACTED]	09/23/2...	In-Prog...
⋮	[REDACTED] ATE	August	2020	[REDACTED]		Overdue
⋮	[REDACTED] III POP G	August	2020	[REDACTED]	09/21/2...	In-Prog...

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.

Agency Name: 20 Site Name: Site Address: 65 LYN,NY,11111

Unit Roster [145/293]

**Unit Roster: 4 Field(s) Requiring Entry or Correction**


- **Units/Tenants Count:** No. Of units and tenants are not the same, please correct the data
- **Unit Features:** 134 Unit(s) with missing Unit Features
- **Rental Subsidy:** 135 Unit(s) with missing Rental Subsidy
- **Unit Type:** 2 Unit(s) with missing Unit Type

Unit Name  Unit features   Primary Service Contract


Contracting Agency  Rental Subsidies

Unit Status

Unit Type

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.

Actions	Primar...	Contr...	Unit Na...	U...	U...	Unit Fea...	Rental S...
	NY/NY III ...	DHS/HR...	690-1A	SRO S...	Unit...	Wheelchair ...	NONE
	NY/NY III ...	DHS/HR...	690-1B	SRO S...	Unit...		
	NY/NY III ...	DHS/HR...	690-1C	SRO S...	Unit...		
	NY/NY III ...	DHS/HR...	690-1D	SRO S...	Unit...		

Then click the ellipsis (  ) and select **Edit Unit**. Scroll back to the top part of the screen 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.

Agency: 2 \ Site: ( ) GO

Pending: 1 **Overdue: 16** Accepted/Pending Approval: 0 In Progress: 1 Move-In: 416 Not Accepted: 4 ← Key Stats Bar

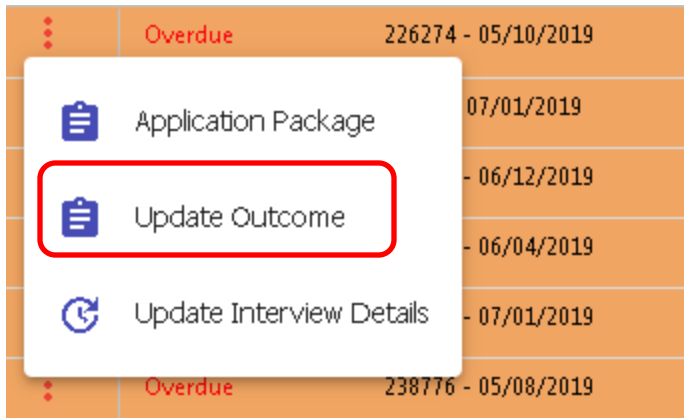
**Referral Roster: 1 Field(s) Requiring Entry or Correction**

- Overdue Referrals: 16 Overdue Referral(s) Requiring Outcomes Entry**

Pending Completed

Action	Status	Client# - Referral Date	Client Name(L,F)	Referring Agency/Site	Eligibility	Prioritization
	Overdue	226274 - 05/10/2019		2001 - DEPARTMENT OF H...	NY/NY III POP...	High
	Overdue	99843 - 07/01/2019		2001 - DEPARTMENT OF H...	NY/NY III POP...	Medium

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



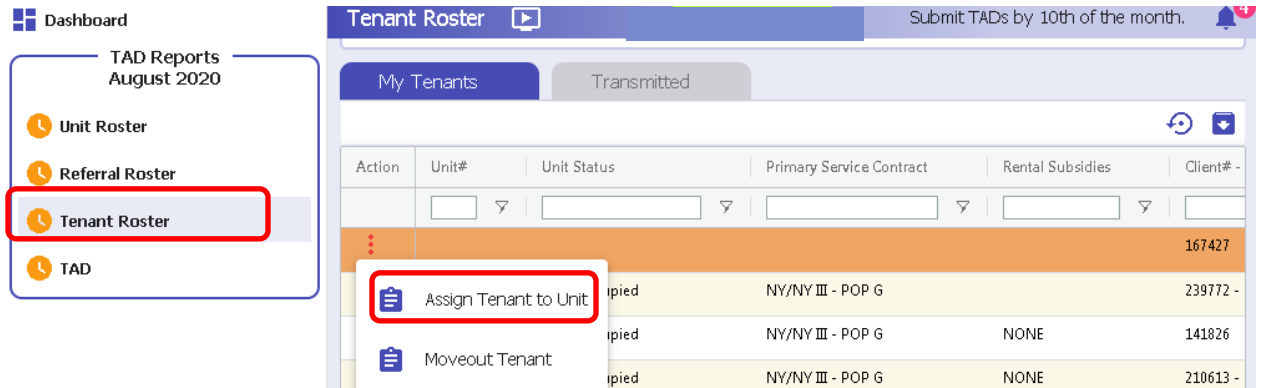
Complete all required fields and press **Transmit**.

A screenshot of a web form titled 'Interview Outcome'. At the top right, it says 'Client Approvals are extended.' with a notification bell icon. The form is divided into sections: 'Referral Details' and 'Housing Agency/Site Details'. The 'Referral Details' section includes fields for 'Referring Agency', 'Referral Date', 'Prioritization', 'Eligibility', 'Placement Criteria', and 'Service Needs'. The 'Housing Agency/Site Details' section includes fields for 'Agency Name', 'Site Address', 'Site Name', and 'Primary Service Contract Type'. Below these sections are two tabs: 'Interview Outcomes' (selected) and 'Documents'. The 'Interview Outcomes' section contains a form with fields for 'Interview' (with a date picker), 'Date', 'Was Interview' (with a dropdown menu), 'Interview' (with a dropdown menu), 'Time', 'Location', and 'Conducted'. A red rectangular highlight is drawn around the 'Interview' and 'Was Interview' fields.

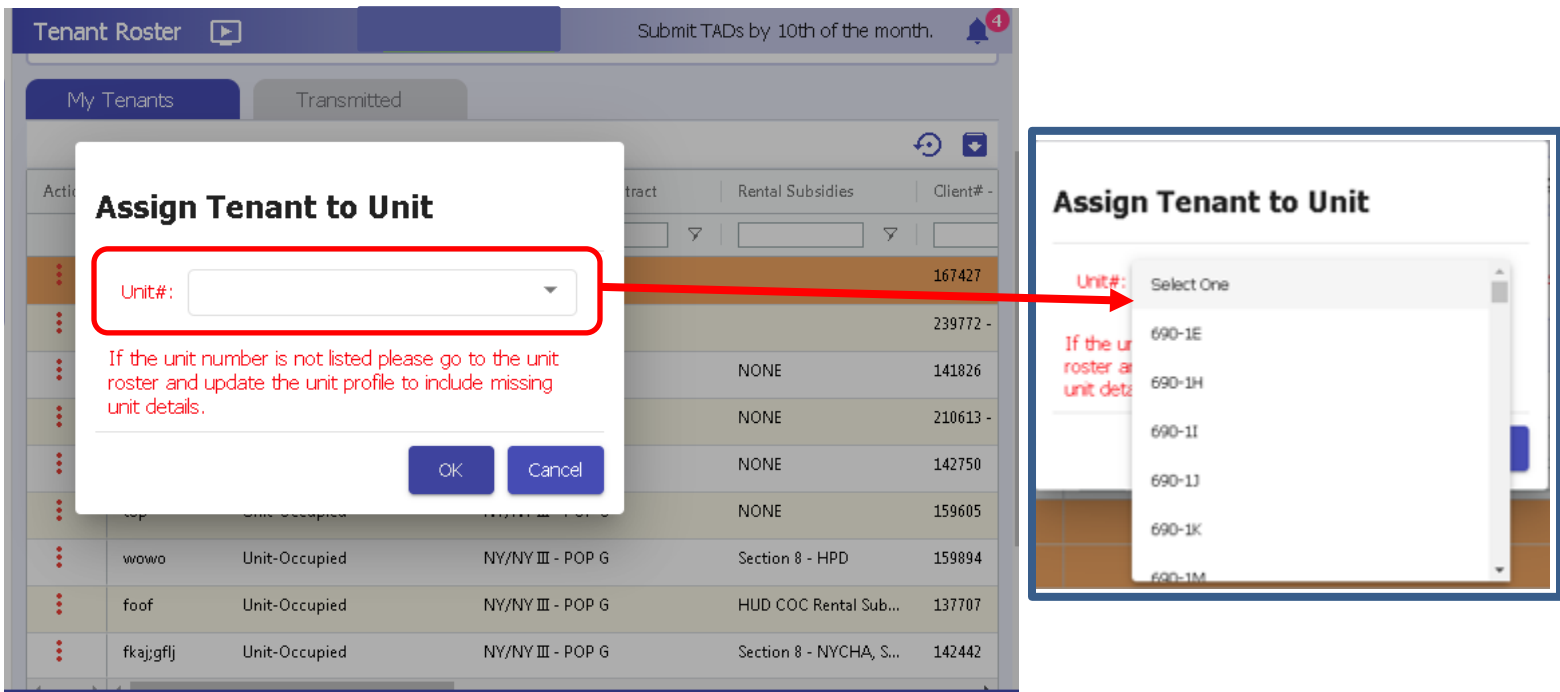
Once you transmit, the Key Stats banner updates with the correct number overdue remaining.

# TENANT ROSTER

From the ellipsis, select Assign Tenant to Unit.

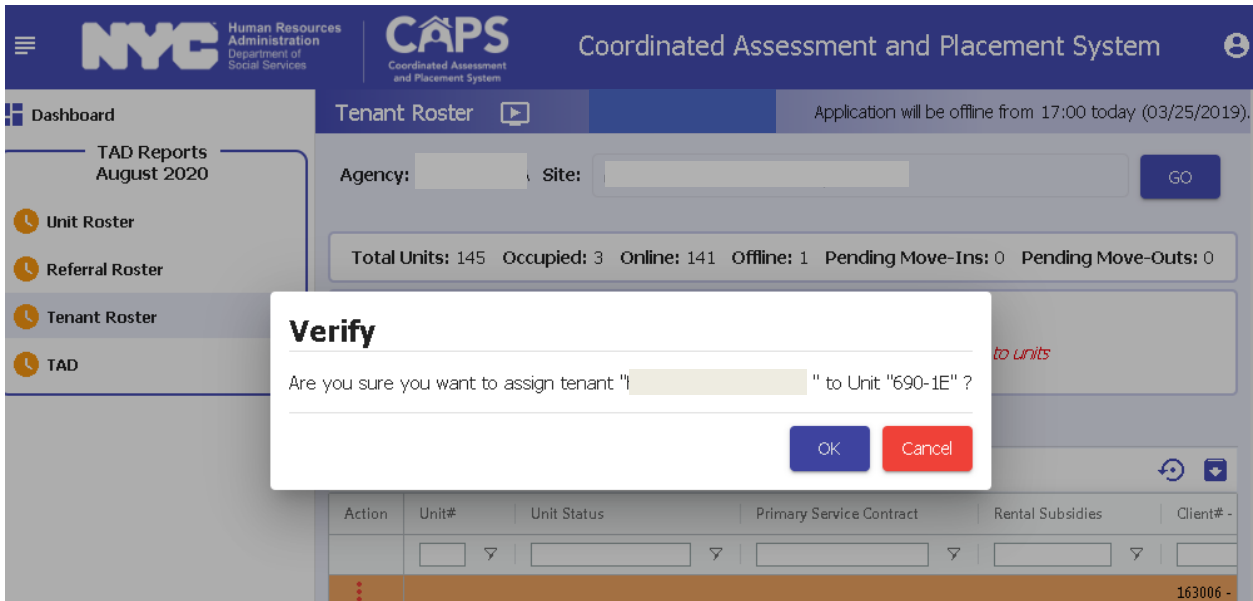


A pop-up box will display. Select the intended unit from the drop-down menu in the box and click **OK**.



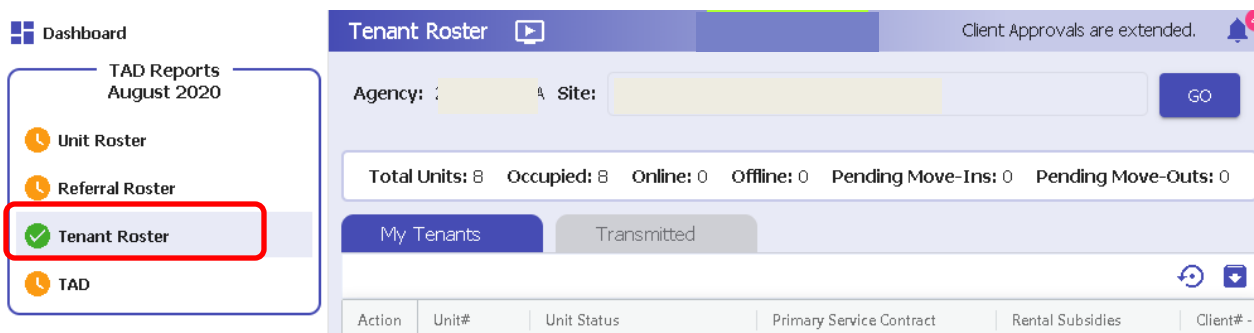
**Note:** For Congregate Sites enter the unit name as it appears in your building. For Scatter Sites you may designate 'to be provided' and update later, once the unit is identified.

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



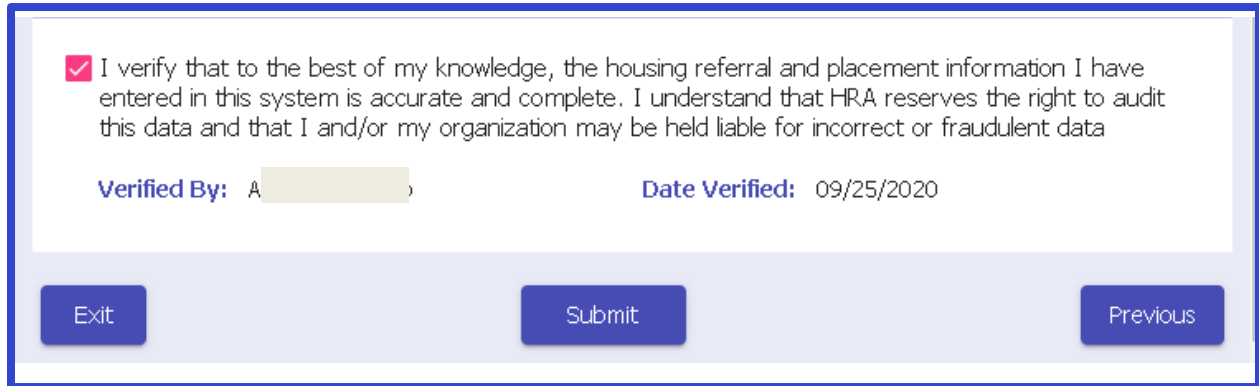
Continue in this manner until all tenants are assigned to their appropriate units.

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.

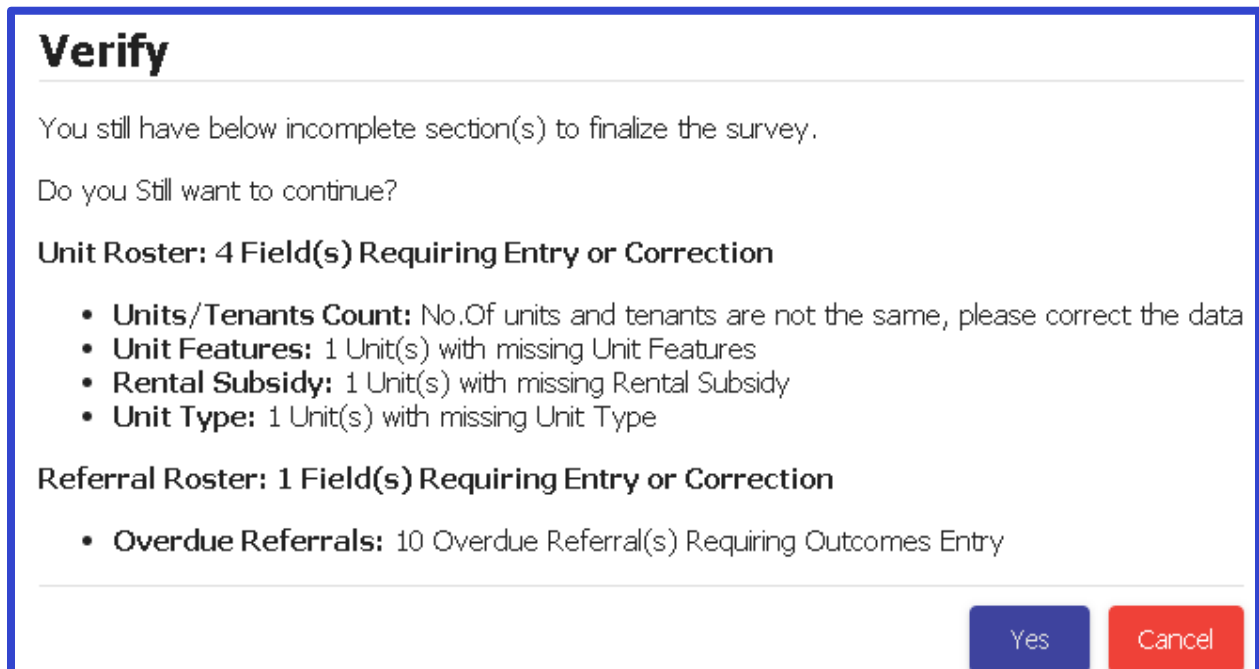
With the tenant roster complete, you are ready to submit your TAD. Select TAD from the left-hand navigational menu. Scroll to the bottom of the screen to find the verification statement. Check the box to verify.



A screenshot of a verification form. At the top, there is a checked checkbox followed by the text: "I verify that to the best of my knowledge, the housing referral and placement information I have entered in this system is accurate and complete. I understand that HRA reserves the right to audit this data and that I and/or my organization may be held liable for incorrect or fraudulent data". Below this, there are two fields: "Verified By: A [redacted]" and "Date Verified: 09/25/2020". At the bottom of the form, there are three buttons: "Exit", "Submit", and "Previous".

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.



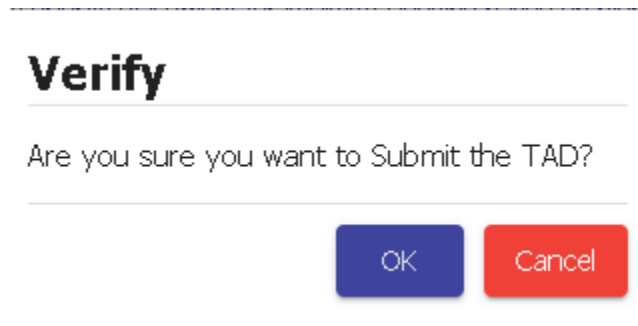
A screenshot of a "Verify" message dialog. The title is "Verify". The text reads: "You still have below incomplete section(s) to finalize the survey. Do you Still want to continue?". Below this, there are two sections of missing information:

- Unit Roster: 4 Field(s) Requiring Entry or Correction**
  - **Units/Tenants Count:** No.Of units and tenants are not the same, please correct the data
  - **Unit Features:** 1 Unit(s) with missing Unit Features
  - **Rental Subsidy:** 1 Unit(s) with missing Rental Subsidy
  - **Unit Type:** 1 Unit(s) with missing Unit Type
- Referral Roster: 1 Field(s) Requiring Entry or Correction**
  - **Overdue Referrals:** 10 Overdue Referral(s) Requiring Outcomes Entry

At the bottom right of the dialog, there are two buttons: "Yes" (blue) and "Cancel" (red).

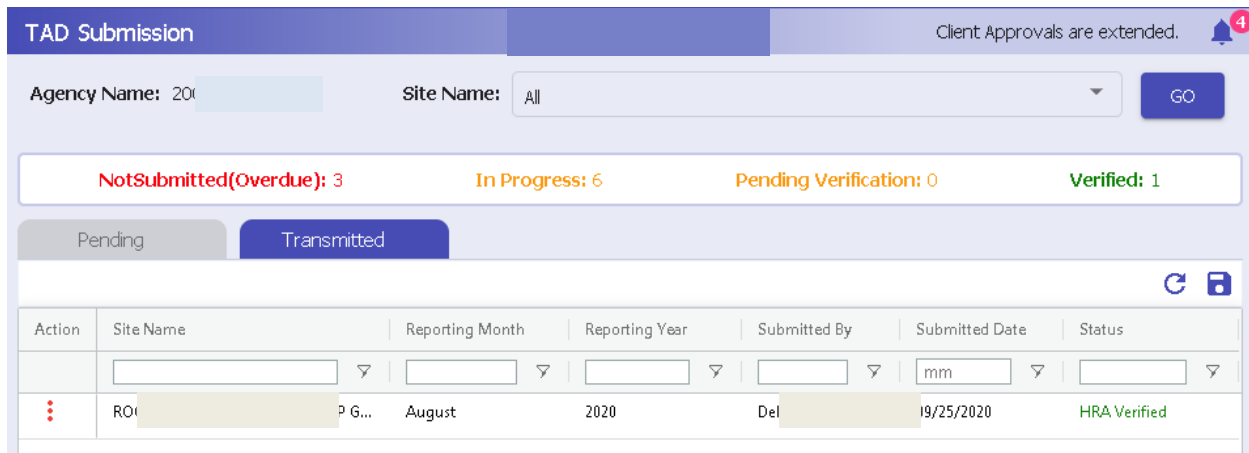


Selecting **Yes** triggers one last pop-up verification alert.



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.



The screenshot shows the "TAD Submission" dashboard. At the top, there is a header with "TAD Submission" on the left and "Client Approvals are extended." on the right with a notification bell icon. Below the header, there are search filters for "Agency Name" (with "200" entered) and "Site Name" (with "All" selected), followed by a "GO" button. A key stats bar displays: "NotSubmitted(Overdue): 3" in red, "In Progress: 6" in orange, "Pending Verification: 0" in yellow, and "Verified: 1" in green. Below the stats are two tabs: "Pending" and "Transmitted", with "Transmitted" selected. A table below the tabs shows a list of TADs with columns: Action, Site Name, Reporting Month, Reporting Year, Submitted By, Submitted Date, and Status. The first row shows a TAD with Site Name "RO...", Reporting Month "August", Reporting Year "2020", Submitted By "Del...", Submitted Date "19/25/2020", and Status "HRA Verified".

Action	Site Name	Reporting Month	Reporting Year	Submitted By	Submitted Date	Status
	RO...	August	2020	Del...	19/25/2020	HRA Verified

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.