

September 2025

Understanding the Referral Status List

# Agenda

#### Referral Status List Overview

#### Reviewing the Referral

- Accessing the RSL
- CAPS Referral Email Notification
- CAPS Referral Email Notification to the Client
- Reviewing Referral in the RSL
- Discussing the Referral with the Client
- Confirming the Appointment
- Using RSL Headers
- Reviewing the Interview Results

#### **Resources and Contacts**

#### **Referral Status List Overview**

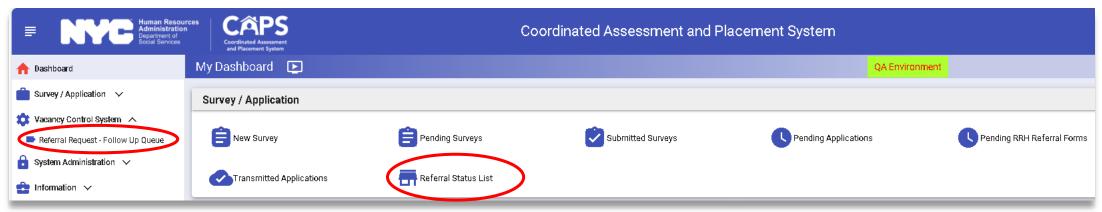
# The Referral Status List (RSL) provides detailed information on supportive housing *REFERRALS* and *APPLICATIONS*

- The supportive housing provider the client has been referred to, the interview date, interview
  modality. the provider contact for the interview, and site/unit information, if available.
- The placement entity that completed that completed the client's referral
- The interview confirmation status
- Interview outcomes entered by the housing provider
- Application approval period, service needs, prioritization, etc

# **Accessing the Referral Status List (RSL)**

The referral status list (RSL) can be located on the dashboard or accessed through the navigation pane.

Once a client has been referred to supportive housing they will appear on the RSL.



#### CAPS Referral Email Notification

Questions about the referral? Reach out to staff in email!

All staff who are assigned to the site in CAPS will receive an autogenerated email notifying them that a referral was transmitted.

#### The email appears as shown below:

The following client(s) currently residing in your shelter have received supportive housing referrals, or have upcoming supportive housing interviews in 3 business days.

Please log into CAPS to review the referral details in your Referral Status List.

The application(s) may have originated from your shelter, or were transferred to your shelter at the time of referral.

Client Information		Placement Agency Information			Interview Details		
HRA Client ID	Referral Date	Submitted By/Date	Placement Agency/Date	Email	Interview Date/Time	Contact Person	Contact Phone#
1111111	07/21/2022	Fuad Rasulov - 03/07/2025	OSAHS	RASULOVF@hra.nyc.gov	03/28/2023 10:00AM	Jane Doe	7181234567
1111111	08/10/2022	Fuad Rasulov - 03/07/202	SOSAHS	RASULOVF@hra.nyc.gov	02/28/2023 12:00PM	Jane Doe	7181234567
1111111	06/27/2022	Fuad Rasulov - 03/07/202	OSAHS	RASULOVF@hra.nyc.gov	03/28/2023 11:00AM	. Jane Doe	7181234567

If you have questions regarding the referral package and/or the interview date/time scheduled, please contact the placement agency staff listed on the referral for assistance. If you require technical assistance, please contact user support at <a href="https://pressystems.org/listed-number-12">https://pressystems.org/liste

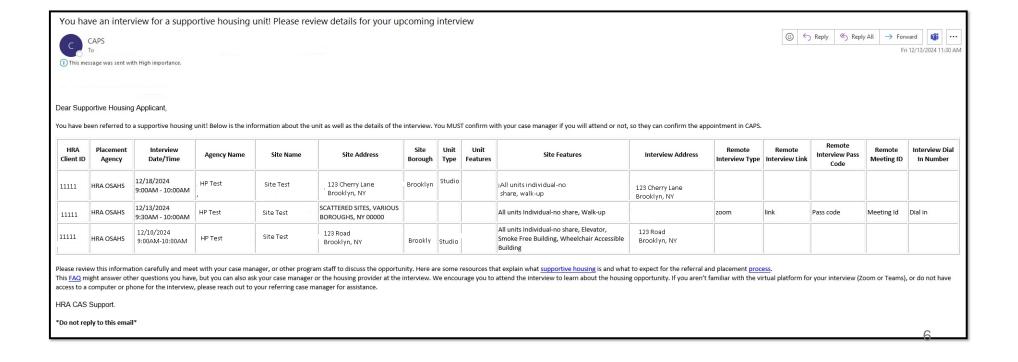
CAPS.

\*Do not reply to this email\*

#### CAPS Referral Email Notification to the Client

For applications submitted as of 12/30/24, clients will receive an email notification when referred to supportive housing. This notification is *only* sent to clients who have provided their email address in the Coordinated Assessment Survey.

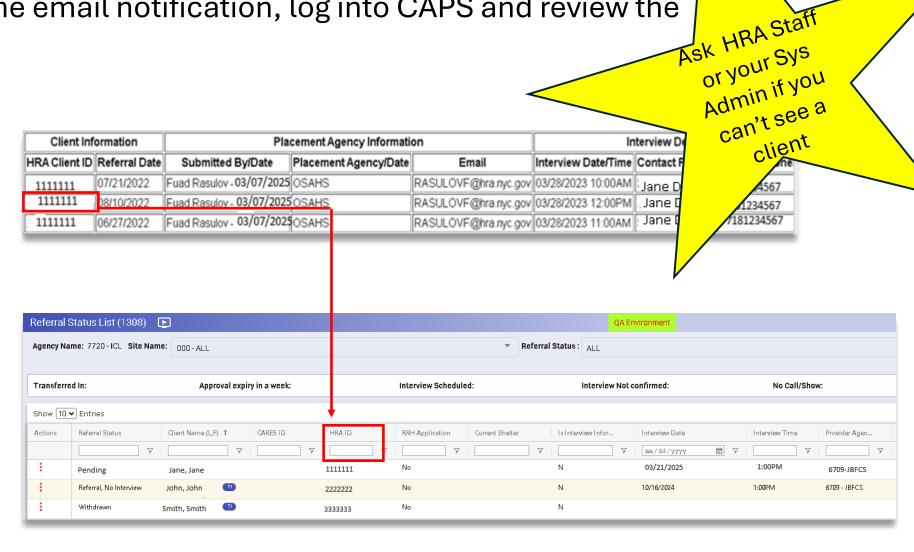
Clients will not receive an email referral notification for Applications approved prior to the date listed above.



# Reviewing the RSL

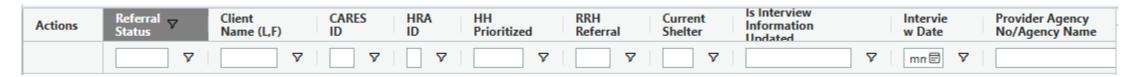
Once you have received the email notification, log into CAPS and review the referral information.

- Copy the HRA ID located in the first column
- Enter the HRA ID in search bar in the column labeled "HRA ID" to filter for the client

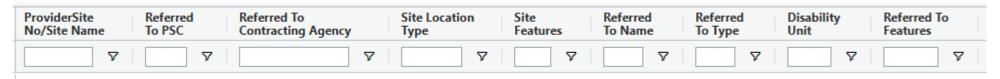


## Reviewing the Referral in the RSL

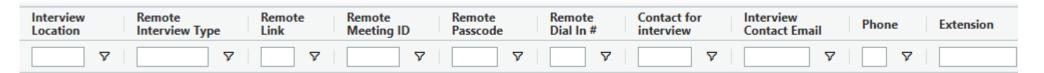
The referral status list contains the following information in the grid from left to right, excluding labels that are self-explanatory:



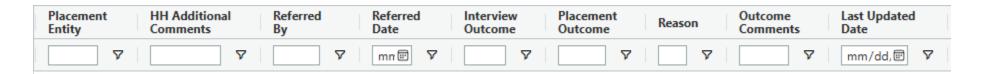
- Actions- Select to take a specific action on the referral (e.g. confirm interview, view application)
- Referral status- The overall status of the referral (e.g. pending, not accepted, withdrawn, move-in verified, etc.)
- HRA ID- Identification assigned to the client in CAPS
- HH Prioritized This client is also an HH patient and their housing team is also involved in the case
- RRH Referral- A "yes" or "no" will be displayed to indicate if this is a rapid rehousing referral
- Current Shelter- The name of the current shelter that the client is assigned
- **Is the Interview Information Updated-** A "yes" or "no" will be displayed to indicate if the interview information has changed
- Provider Agency / Agency Name: Housing provider name



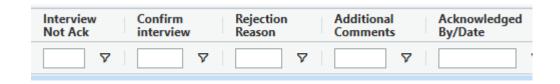
- Prover Site/Site Name- The name of the housing provider's program site
- **Referred to PSC-** The primary service contract of the unit that the client was referred (e.g. ESSHI Senior, NYC 15/15 AD, SMI singles, NY/NY I/II, etc.)
- **Referred to Contracting Agency-** The contracting agency that provides the primary service contract funding (e.g. DHS/HRA, DOHMH, OMH, etc.). The contracting agency is responsible for providing oversight for the funded units by monitoring social services such as: interview and intake processes, case management, unit occupancy, etc.
- Site Location Type- Congregate (social services are located within the building) or scattered site (case managers visit the client in their apartments, which may be at various locations)
- Referred to Name: The unit # the client was referred to
- Site features- This lists the features of <u>the building</u> (e.g. elevator, wheelchair accessible, etc.)
- Referred to type- The unit type (e.g. SRO, Suites, studio, 1 BR, etc.)
- **Disability Unit:** If the unit is designate for Visual, Hearing and/or Mobility impairment
- **Referred to Features:** These are the features of the <u>unit</u> such as: private kitchen: Yes or no, wheelchair accessible unit, walk-up, etc.)



- Interview Location- If in person, the address where the interview will take place. This may not be where the unit is located.
- Remote Interview Type-The name of the platform where the interview will be held virtually (only populated if conducted online)
- **Remote Link-** The link to the platform where the interview will be held virtually (only populated if conducted online)
- Remote Meeting ID- The meeting ID to enter on the listed platform
- Remote Passcode- The meeting passcode to enter on the listed platform
- Remote Dial In#- The phone number that can be used if you are unable to access the platform online
- Contact for Interview- The name of the person conducting the supportive housing interview
- Interview Contact Email Use if running late, or have specific questions about the unit/interview
- **Phone** Use if running late, or have specific questions about the unit/interview

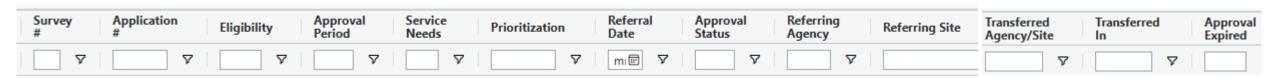


- Placement Entity- The agency that transmitted the referral
- HH Additional Comments generally these are for OSAHS and can be ignored
- Referred by- The name of the staff at the placement entity that transmitted the client referral
- Referred Date- The date that the referral was transmitted
- **Interview Outcome-** The outcome of the interview (e.g. Client did not accept housing, accepted-pending management approval, e.g.)
- Placement Outcome- Once accepted the status of the placement (e.g. pending move-in or move-in)
- Reason- A sub-status of the interview outcome (e.g. No call/no show, interview cancelled, etc.)
- Outcome Comments: Narrative entered by the housing provider to provider more details on the interview outcome
- Last Updated Date:



- Interview Not Ack: Y/N if N, that means that the interview has not be confirmed or declined
- Confirm Interview: Y/N/ blank
  - Y= interview confirmed that client will attend
  - N = interview declined (and we will swap in a new client, if time permits)
  - Blank = interview neither confirmed nor declined (we may swap out your client if you do not confirm or decline!)
- **Rejection Reason:** Reason interview is being declined; drop down entered by referring agency
- Additional Comments: More comments related to interview declination entered by referring agency (free text)
- Acknowledged By / Date: Referring agency staff who confirmed or declined interview

# Reviewing the Application Information in the RSL



- Survey #: Number of the CAPS survey
- Application#: Application # (not often used this is **NOT** the HRA ID)
- **Eligibility-**The client's supportive housing application eligibility usually there are more than one eligibilities (e.g. ESSHI Senior, 15/15 AD, NY/NY III Pop A, General Population, etc)
- Approval Period-The approval period of the supportive housing application
- Service Needs-The level of care determined for the housing eligibility (e.g. Community Care/Level II, level II, Level II/24)
- **Prioritization-** The Standardized Vulnerability Assessment determined (e.g. high, medium, or low)
- **Referral Date-** The date the supportive housing application was submitted to the PACT unit (**NOT** the date the client was referred for an interview).
- Referring Agency / Site: Agency / site the submitted the 2010e
- Transferred Agency / Site: If the application was transferred <u>from</u> the original agency that submitted it, the agency / site
  the app was transferred <u>to</u>
- Transferred In: Y/N
- Approval Expired: Y/N –if a client was referred on an active app, a new app is not required

## Discussing the Referral with the Client

It is important to review the referral details completely with the client before entering a response in CAPS:

- Discuss the housing opportunity with your client, let them know the time/date of the interview
- Review the referral information <u>in detail</u> with the client, making sure to share:

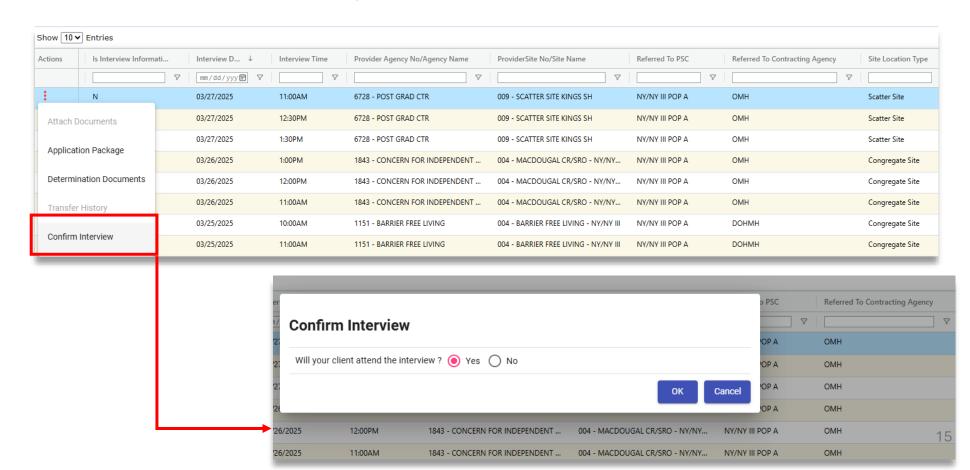
   Where the unit is located (consider showing the client on google maps the location, use street view, etc.)
  - Unit and site features:
  - Is the unit located in an elevator building or walk-up
    Is the unit shared, an SRO, suite, studio, 1br, etc.
    How the interview will be conducted (in-person or virtually)
  - Explain what supportive housing is to help the client make an informed decision: Quick Guide to Supportive Housing for Client or New York City Supportive Housing: Client Frequently Asked Questions (FAOs)
  - Indicate in CAPS if your client plans to attend the interview ASAP. If the client is not interested in attending, provide a detailed reason (e.g. Client has decided to live with family in PA and is no longer interested in supportive housing)
  - Prepare and accompany the client to the interview
    - Show them photos of the project they are being referred to, or other similar projects
    - Explain the benefits of having a rent-stabilized lease and subsidized rent
    - Escort them to the interview; will reduce the no call/no show rate
    - Prepare them for document collection and potential delays in the process
    - Check Client Documents in Survey and Application for birth certificates, SSN Card, and photo IDs

# Confirming the Interview

After discussing the referral details with the client, it is important that a response is entered in CAPS immediately. Clients referred by OSAHS that **have not** been confirmed will be swapped for other eligible clients.

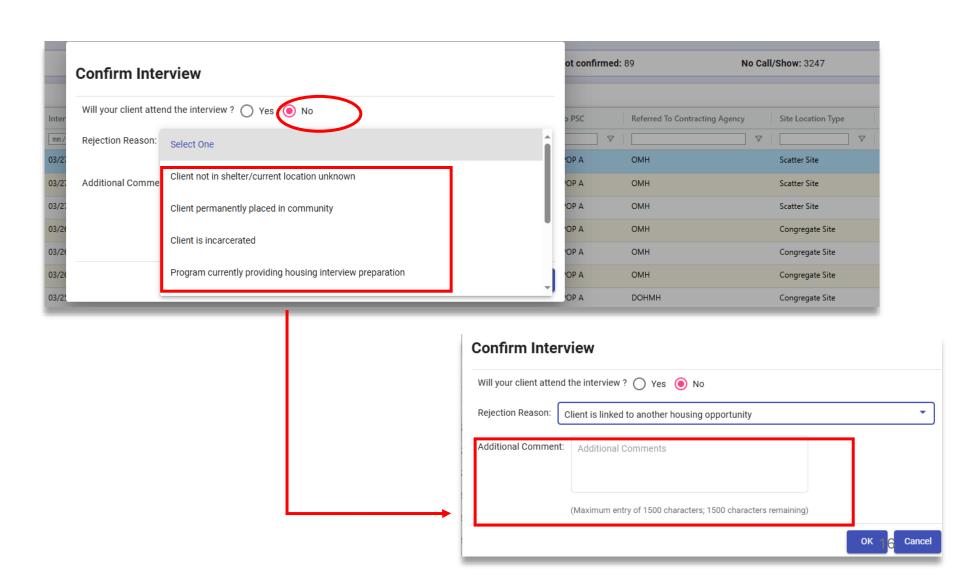
You must confirm in CAPS that your client will attend the interview.

- Click the three red dots in the far-left column.
- 2. Click "confirm interview"
- 3. Select "Yes" or "No". Then "Ok"

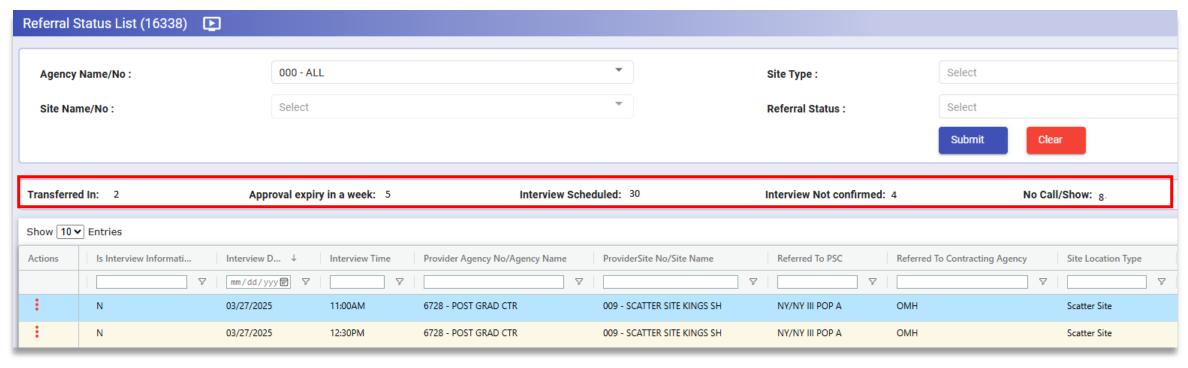


# Confirming the Interview

- 1. If the client declined to attend, enter "No"
- 2. Select from drop down menu the reason the client will not be in attendance
- 3. Add additional comments. Make sure that the comments are detailed and explain the reason selected
- 4. Select "Ok" once each question has been answered



# Using RSL Headers



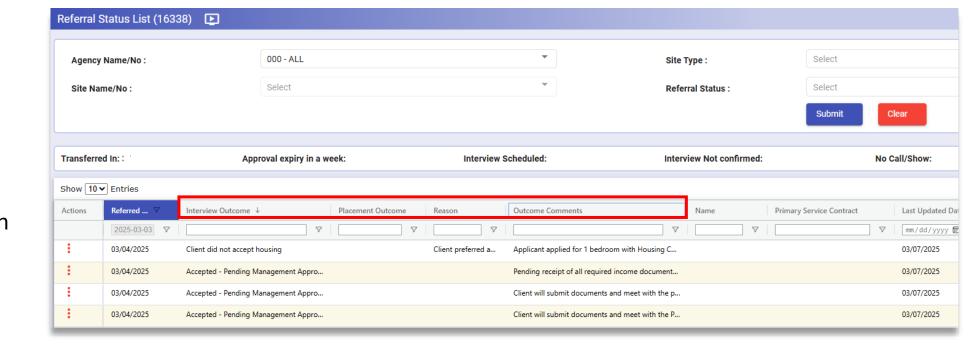
To help manage the referral status list, you can click on any of the following headers to filter. Only client referrals that match the heading will be displayed:

- Transferred in- Applications that were transferred from another referring agency
- Approval expiry in a week- Applications that will expire in a week
- Interview scheduled- Interviews that are upcoming
- Interviews Not Confirmed- Interviews that have not been confirmed "yes" or "no", if the client plans to attend
- No Call/No Show- Clients who didn't attend a scheduled interview

# Reviewing the Interview Results

Supportive Housing Providers typically enter interview results within 48 hours of the interview. Check CAPS for the interview results and once received, review the results with the client.

- Search the list for the client by typing in the name field, HRA ID, etc.
- Scroll over to the "Interview Outcome" column
- 3. Review the information entered in the "
  Interview Outcome",
  "Reason" and
  "Outcome" columns
- 4. Discuss the results with the client



## **RSL Operational Considerations**

- The RSL should be reviewed <u>DAILY</u> at a supervisor level. Who at your site is responsible for this?
  - ✓ Expiring applications
  - ✓ Upcoming interviews
    - ✓ All interviews confirmed?
    - ✓ Has the client been prepped?
    - ✓ Escort arranged?
    - ✓ Basic documents gathered?
  - ✓ Review interview outcomes
    - ✓ NCNS what happened?
    - ✓ Rejections anything in the notes that need to be addressed with the client?
    - ✓ Client declines review and work on managing expectations (e.g. singles will not get a 1BR)
    - ✓ Acceptances Congrats! Start gathering documents, applying for PA and head over to the Follow Up Queue in CAPS to continue the work through to move in.

#### Resources

#### **Supportive Housing Resources**



#### Resources

#### **CAPS Trainings**



#### Who Do I Contact in OSAHS?

Rent Ups: Alyson Zikmund <u>zikmunda@hra.nyc.gov</u>

Re-Rental Vacancy Control / Scheduling/Rescheduling: Melody Reid reidme@hra.nyc.gov

Re-Rental Referrals: Kimberly Butler <a href="mailto:butlerki@hra.nyc.gov">butlerki@hra.nyc.gov</a>

Re-Rental Follow-Up: Lisa James Jackson jamesl@dss.nyc.gov

Coordinated Entry / Site Profile: Robin Pagliuco pagliucor@hra.nyc.gov

PACT/ Eligibility Determinations: Jacqueline McNeil mcneilj@hra.nyc.gov

Technical Support or Issues with CAPS Access: HRA CAS Support <a href="mailto:hracassupport@hra.nyc.gov">hracassupport@hra.nyc.gov</a>