

Department of Disabilities, Aging, and Independent Living (DAIL)
Shared Living Program, Home Safety Inspection
Agency User Manual

Naming Conventions: Documents

August 2023

Overview

To easily locate documents in the Housing Portal, it is important that the type of document uploaded is accessible, and the naming convention for the document is used.

All documents are to be uploaded into the **Related** tab of the Initial Home **Safety or Accessibility Assessment**, unless otherwise directed by DAIL. Exceptions to this process are Emergency Placements and Shared Location Requests. (See Emergency Placement and Shared Location documents)

Document Types

Documents that are uploaded into the DAIL Housing Portal should be in a format that is accessible to multiple people and requires only 'one click' to access the document. Usually this would be a Microsoft Word document, a PDF, or an Excel Document. (PDF is preferred)

An uploaded photo must be in jpeg or gif, or included in a PDF or Microsoft Word document.

Naming Convention for Uploaded Documents

All documents, and photos, uploaded into the Portal should have one of these Naming Conventions.

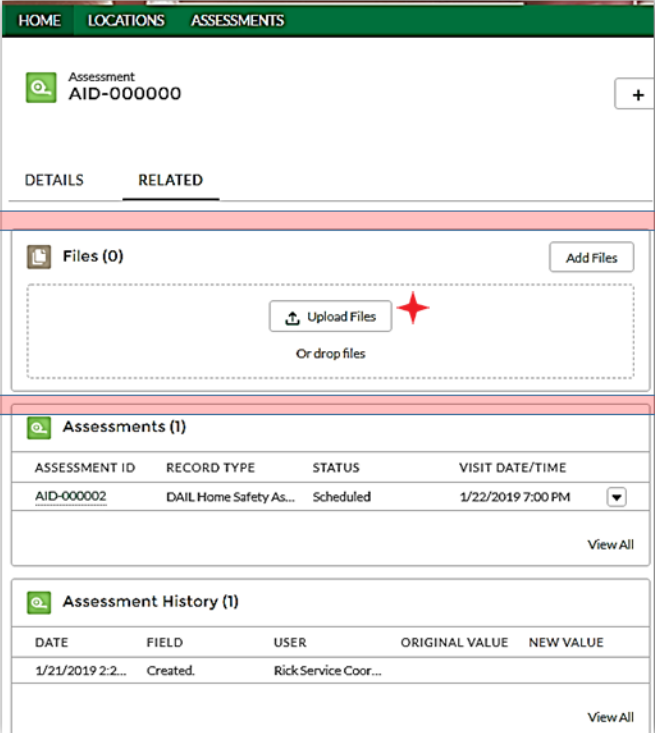
Document Type	Use Naming Convention*
Accessibility Reimbursement Receipts	Receipts_(AID#)_(Participant Last Name)_(Date)
Accessibility Assessment Verification of Modifications	A1-ModVerification_(Participant Last Name)_Date
Agency Accessibility Modification Plan and Request for Modification Reimbursement Form	AMPR_(Participant Last Name)_(Date)
Agency Accessibility Modification Plan and request for Modification Reimbursement Form – <i>Attachment</i> (When additional space is needed)	AMPR-1_(Participant Last Name)_(Date)
Assessment Request form - For Housing Safety Contractor	AR_(Street and Town)
Certificate of Occupancy or Residency (Fire Marshall or Housing Authority assessment, Certification of Occupancy, any other housing assessment by another organization)	CR_(Street and Town)
Chimney Inspection Verification	Chimney_(Street and Town)
DAIL Information or Notes (DAIL use only)	DAILInfo-(Street and Town)
Fire Safety Escape Plan	FP_(Street and Town)
Physical Therapist or Occupational Therapist document	PTOT_(Participant Last Name)_(Date)
Pre-Assessment Form, Accessibility	PAA_(Participant Last Name)_(Date)
Pre-Inspection Form, Home Safety	PI_(Street/Address)
Shared Location Agreement Document or Form	SLA_(Participant Last Name)_(Street and Town)
Variance Support Document or Form <i>(If there is more than one document – indicate “Agency” “Participant” or “Guardian” after VAR; Example: VAR_Guardian_XXXX_123SchoolStreet_Montpelier</i>	VAR_(Participant Last Name)_(Street and Town)
Water Test	Water_(Street and Town)
Other type of document	Other_(Street and Town or Participant Name)_(Information about Document)

* Street and Town are the 911 location (the State and zip code not required on the name of the document.) The document name must start with these naming conventions.

Adding Documents to the Assessment

Name the files on your computer using the required naming conventions. With the **Assessment** open, Click **RELATED**.

Go to the **FILES** section in the **Related Tab**. Select the document(s) on your computer and drop the files into the database or click **UPLOAD FILES** and select the document(s) from your computer and click **UPLOAD**.



The screenshot shows the 'ASSESSMENTS' page for assessment ID AID-000000. The 'RELATED' tab is active. A red box highlights the 'Files (0)' section, which includes an 'Add Files' button, an 'Upload Files' button with a red star icon, and the text 'Or drop files'. Below this are two tables: 'Assessments (1)' and 'Assessment History (1)'. The 'Assessments (1)' table has columns for ASSESSMENT ID, RECORD TYPE, STATUS, and VISIT DATE/TIME. The 'Assessment History (1)' table has columns for DATE, FIELD, USER, ORIGINAL VALUE, and NEW VALUE.

ASSESSMENT ID	RECORD TYPE	STATUS	VISIT DATE/TIME
AID-000002	DAIL Home Safety As...	Scheduled	1/22/2019 7:00 PM

DATE	FIELD	USER	ORIGINAL VALUE	NEW VALUE
1/21/2019 2:2...	Created.	Rick Service Coor...		

Glossary for Documents

- **Accessibility Reimbursement Receipts:** Receipts and invoices for Accessibility modifications that were completed in the modification plan. (Accessibility Modification Plan and Request for Modification Reimbursement Form should always be included with this document.)
- **Agency Accessibility Modification Plan and Request for Modification Reimbursement Form:**
 - Accessibility Assessments started after December 1, 2022 require an Accessibility Modification Plan to address any safety concerns found during the Assessment process.
 - Effective December 1, 2022, until notified otherwise, a Provider Agency may request reimbursement for accessibility home modifications found on the Accessibility Assessment. The Updated form with reimbursement information must be uploaded into the Housing Portal with any invoices.
- **Assessment Request form - For Housing Safety Contractor:** Form required to be filled out and sent to the Housing Contractor to schedule a Home Safety Inspection.
- **Certificate of Occupancy or Residency:** “Certificate of Occupancy”, or CO, means an inspection by the Division of Fire Safety, the Vermont Department of Labor and Industry, the Vermont State Housing Authority, Section 8 Housing or a local housing authority. The CO must be the actual certificate, or document, on authorized letterhead and if there are multiple units or apartments, the CO must address the address location and which unit(s) or apartment(s). A letter stating a CO exists is not acceptable.
- **Chimney Cleaning Verification:** At the time of a Home Safety Assessment, a Shared Living Provider must provide documentation to show that any chimney used for wood or wood pellet heat being used in the home has been cleaned and inspected by a professional within last year. A certificate or report from a professional cleaner is required, an invoice is not acceptable.
- **Fire Safety Escape Plan:** ALL Initial Home Safety Inspections are required to have a Fire Safety Escape Plan. (Note: A new Fire Safety Escape Plan is required for 5-year reinspections.)
- **Physical Therapist or Occupational Therapist Note:** (Prior to December 2022) Physical Therapist or Occupational Therapist assessment reports for Accessibility Assessment variance requests is required.
- **Pre-Assessment Form, Accessibility:** ALL new Accessibility Assessments need a Pre-Assessment completed by the agency, and uploaded into the Housing Portal, prior to contacting the DAIL Contractor.
- **Pre-Inspection Form, Home Safety:** ALL new Safety Assessments need a Pre-Inspection completed by the agency, that is uploaded into the Housing Portal, prior to contacting the DAIL Contractor.

- **Shared Location Agreement Form:** Once two agencies contracting with the same Shared Living Provider have consulted about the placements of Participants, a Shared Location Request (RAN) is required to be completed in the DAIL Housing Portal. The Shared Location Agreement Form is required to be completed by both agencies for this process; this form includes Participant or Guardian signature.
- **Variance Support Document or Form:** A statement from the Participant receiving DAIL-funded services and their guardian (if applicable) is required for all variance requests. The statement must acknowledge and support the request, confirming the proposed solution will not result in safety risks of the individual receiving DAIL-funded services.
- **Water Test:** Any home that is not on a public water system is required to have a water test completed. This is up to the home owner to request this test, and it needs to be requested prior to the inspection being completed by the Housing Contractor.
- **Other:** There may be other types of documents or photos that need to be uploaded to provide additional information. Adding the reason, or type, of the other document in the name is necessary.