Department of Disabilities, Aging, and Independent Living (DAIL)
Shared Living Program, Home Safety Inspection
Agency User Manual
Printing Case, Assessment, Record and Reports
March 2023

It is important for the Provider Agency to use the reports in the Housing Portal to assist in monitoring the status of shared living home inspections and accessibility assessments for their agency. The reporting capabilities allow agencies to monitor outstanding non-compliant assessments, re-inspections that are due, inspections and assessments scheduled, agency homes entered, as well as other information.

Upon the approval of a Home Safety or Accessibility Assessment, a copy of the Assessment (Print All Assessment Items) and a copy of the Case Report (Print Record in the Case) are required to be added to the Participant's file at the agency. In addition, the Provider Agency will ensure the shared living provider has a copy of the Print All Assessment Items for their home book.

- If it is a shared Location and the Provider Agency is not able to view the Assessment in the Location, they should work with the second Provider Agency to obtain a copy.
- If the Provider Agency is not able to view the Assessment for the Location, and it is not a shared Location, the Agency should contact DAIL for assistance in obtaining a copy of the Assessment.
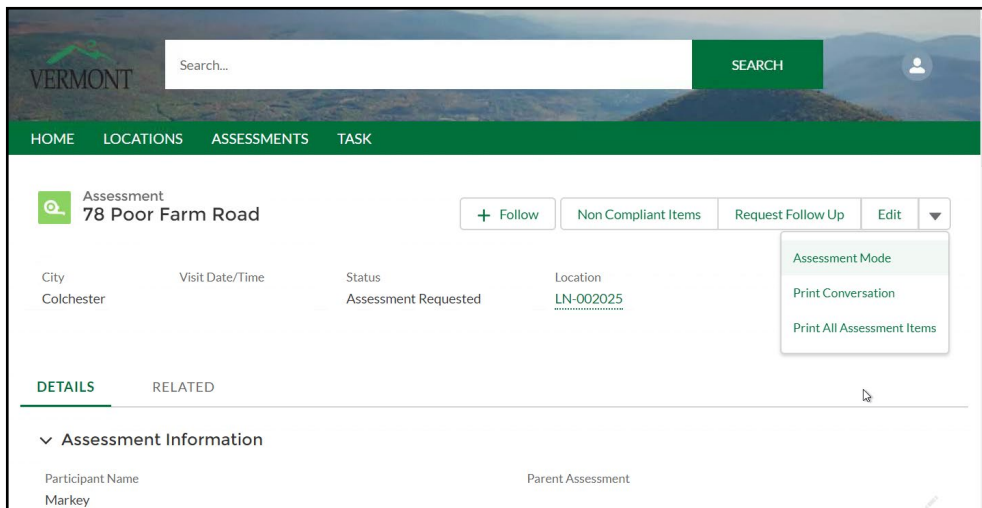
Printing Assessment Items

All of the Assessment Items, and actions taken on each item, is available by using Print All Assessment Items.

Open the *Initial* Assessment and click on the drop-down arrow in the upper right corner.   Click on **Print All Assessment Items.**   The information may be printed, or it can be downloaded.

Reminder:
A copy of the Assessment (Print All Assessment Items) and a copy of the Case Report (Print Record in the Case) are required to be added to the Participant's file at the agency. In addition, the Provider Agency will ensure the shared living provider has a copy of the Print All Assessment Items for their home book.

Print Case Record

Information about the Case is available by opening the Case, then click **Print Record**. You can preview or print the Case information.

Reminder:
A copy of the Assessment (Print All Assessment Items) and a copy of the Case Report (Print Record in the Case) are required to be added to the Participant's file at the agency.
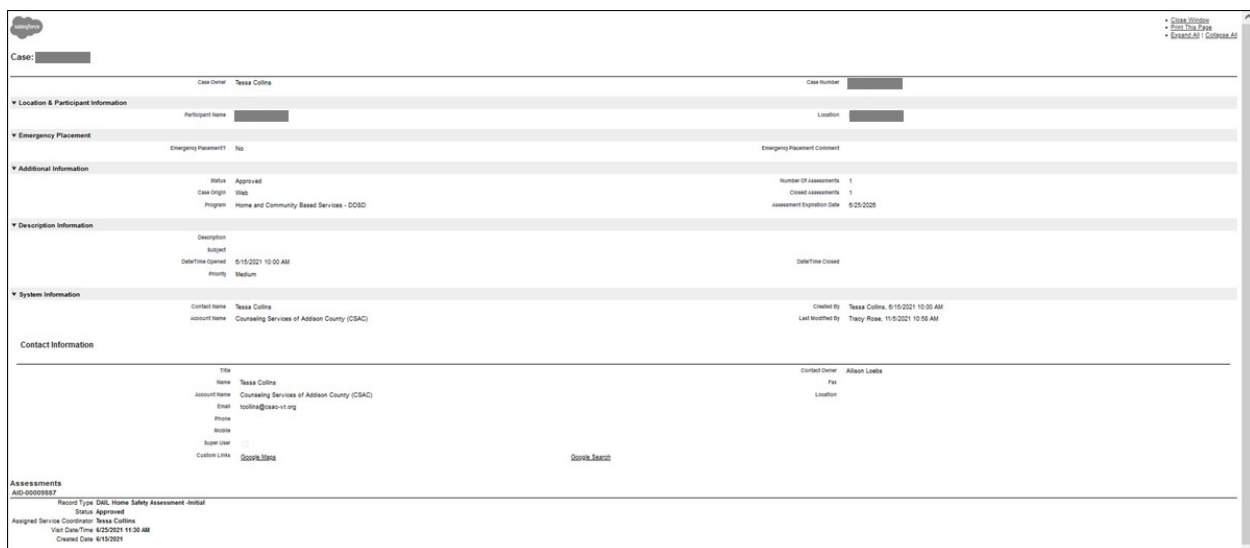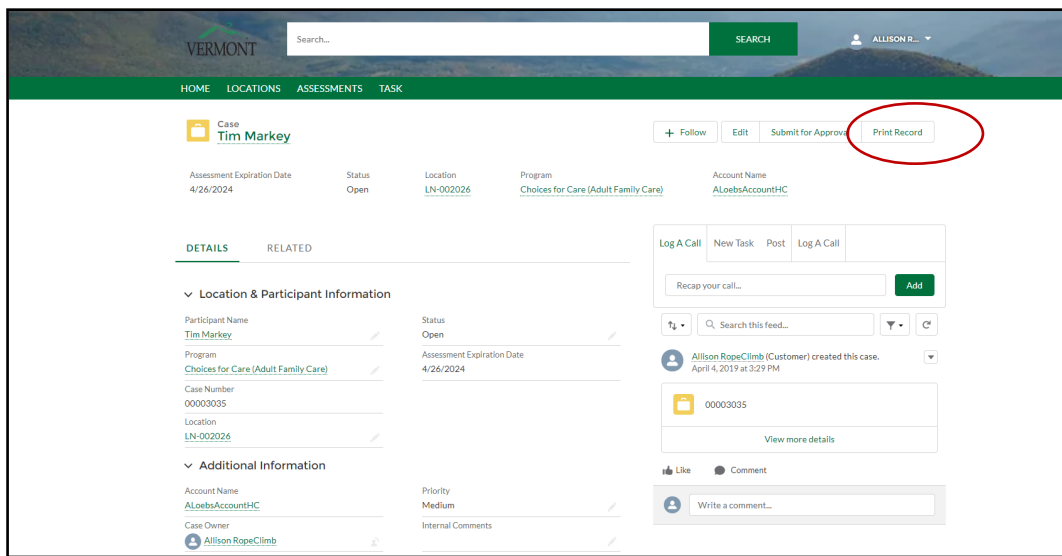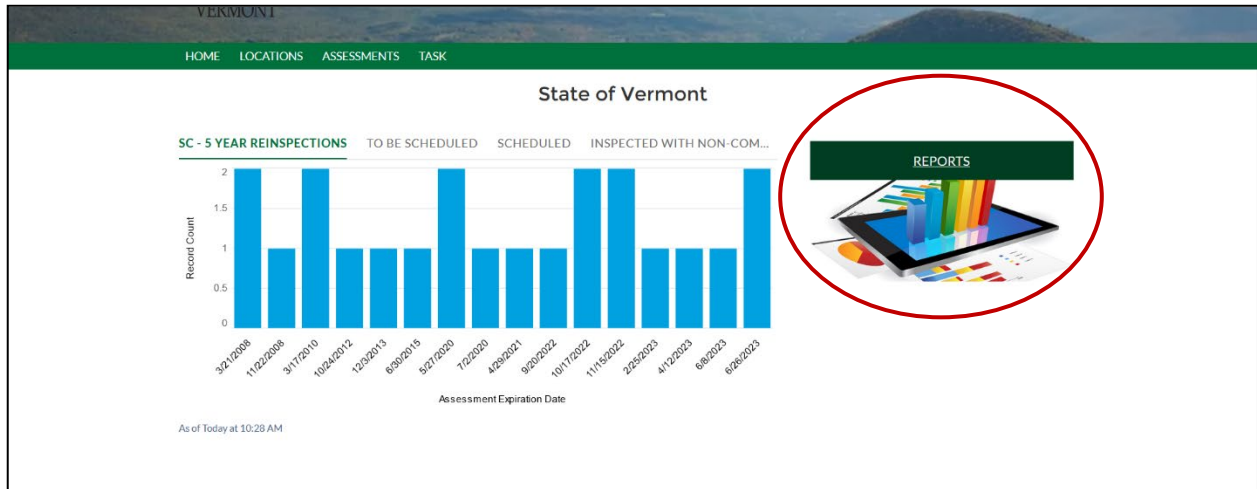
Reports

Some of the frequently used reports can be found on the Home Page or Dashboard.   On the Dashboard click on a tab (SC-5 Year Reinspection, To be Scheduled, Scheduled, or Inspected with Non-Compliant), click on the chart, and View Report.

Once a Report is opened:
- The columns can be sorted (See below)
- The Report can be downloaded into an Excel Spreadsheet.   (See below)
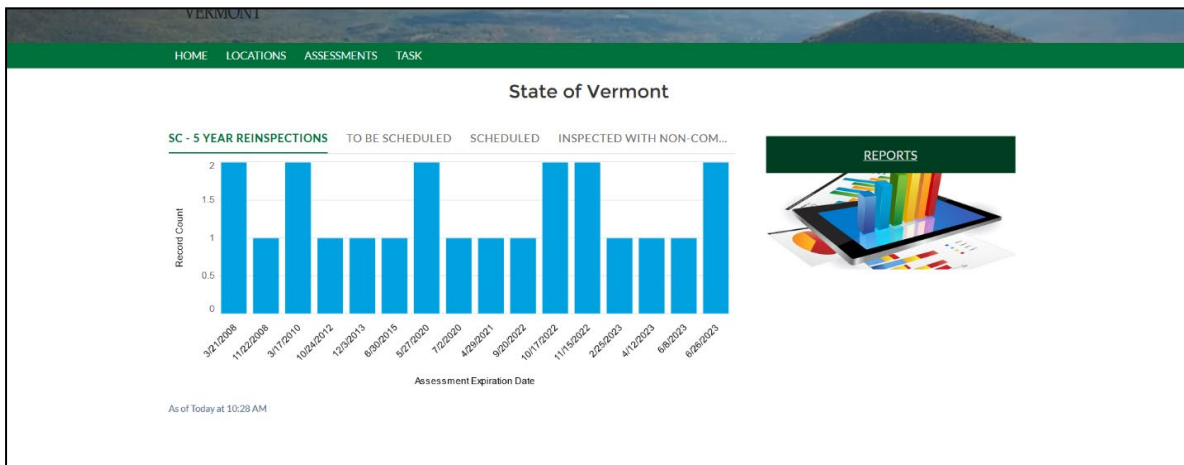
All reports, including the Dashboard reports, can be viewed by clicking **Reports** on the dashboard.

Click **All Folders**, and **Service Co-ordinator Reports**.   A list of available reports will show.

Note: After clicking **All Folders** you may see a folder or an Ellipsis (three dots); click on the folder or Ellipsis.

Once a Report is opened:

- The columns can be sorted in ascending or descending order (click the arrow in the column heading), the size of the columns can be enlarged or made smaller by clicking on the column border. This works like a MicroSoft Excel spreadsheet.
- The Report can be downloaded into an Excel Spreadsheet: In the upper right corner of the report, click on the down arrow next to "Edit", click "Export" and there are different options you may choose, pick "Excel Format" and then click on "Export."