

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

Agency Portal User Manual:

Accessibility Assessments - Accessibility Project

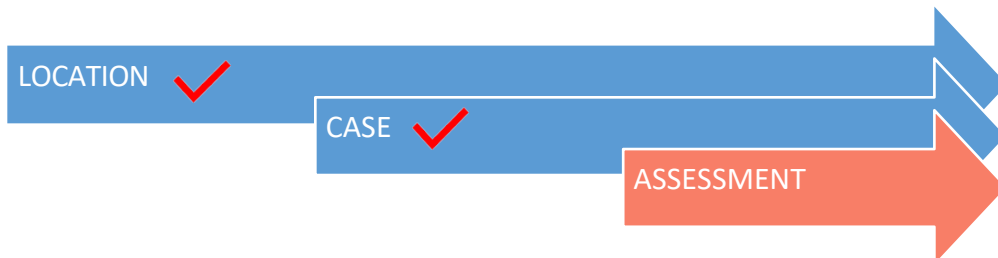
(Please see separate document for Home Safety Assessments)

December 1, 2022

When an individual who uses a wheelchair, a walker, or has other mobility or accessibility needs (such as low vision or hearing loss that affect the individual's ability to freely navigate the home environment) receives home supports funded by DAIL, an Accessibility Assessment of the residence and Participant's needs is required. The Accessibility Assessment is intended to maximize an individual's independence and level of safety and is designed to provide workable and safe environments for caregivers.

The Accessibility Assessment is a person-centered Assessment; each Participant identified as having a mobility or accessibility needs within the home must have an Accessibility Assessment completed by the Accessibility Contractor.

The **Location** and the **Case** must be in the database
before an **Assessment** can be added.



Note: There should **ALWAYS** be a non-expired Home Safety Assessment associated with the Location, or an Open (pending action) Home Safety Assessment.

Pre-Inspection Form

BEFORE an Accessibility Assessment is created in the DAIL Housing Portal:

- A [Housing Accessibility Pre-Inspection Form](#) must be completed by the agency, and the agency should work with the home provider to correct any easily identifiable items that may need correcting or added;
- The **Pre-Inspection form** MUST be uploaded into the **Related** tab of the **Accessibility Assessment** once the Assessment is created in the Portal (See Requesting an Accessibility Assessment below).

The **Housing Accessibility Pre-Inspection Form** MUST be completed every time a new Accessibility Assessment is requested.

Requesting An Assessment

*Definition: **Current Case** means an Approved Case with a current (non-expired) Home Safety Assessment, or an Open Case (pending actions) with a current Home Safety Assessment.*

Step 1 – Pre-Inspection Section: See section on **Pre-Inspection Form** above which is required to be completed prior to creating an Accessibility Assessment in the DAIL Housing Portal.

Step 2 – Creating an Accessibility Assessment

- a) Find the Location and look for a Case for the Participant:
 - If the current Case for the Participant is Open, go to next step
 - If the current Case for the Participant has been **Approved**,
 - Change the Case **Status** from **Approved** to **Open**,
 - **Save**, then go to next step
 - If there is not a current Case for the Participant, the agency will create a new Case (See [DAIL Housing Inspection and Accessibility Portal Manual for Agency Provider](#))
- b) With the **Case** open, click on the **Related** tab
- c) Go to the **Assessment** section and click **New**, a **NEW ASSESSMENT** screen will appear.
- d) **RECORD TYPE:** Select the **Record Type** of the inspection, **DAIL Home Accessibility Assessment – Initial**, and click **NEXT**.

Note: Only an INITIAL assessment should be selected in this step.

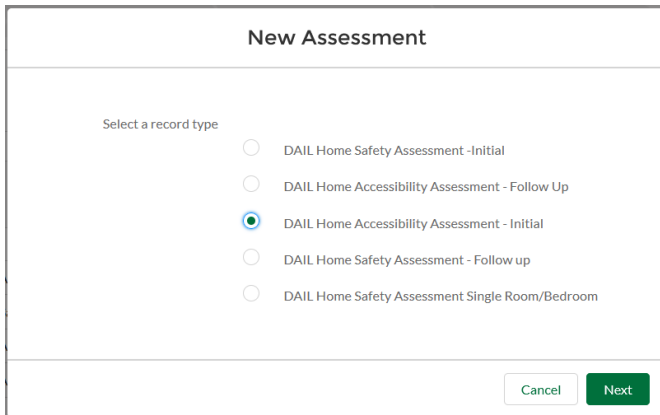
- e) **STATUS:** The Status should be changed to: **To Be Scheduled**.
- f) **FORM TEMPLATE:** Type 'Accessibility' and select the correct template.
- g) Check the **Pre-Inspection Complete** block.
 - After completing and saving the information on this page, **the Housing Accessibility Pre-Inspection Form MUST be uploaded** using the correct naming convention (*For information and process on "Documents", see separate document Agency User Manual, [Naming Conventions: Documents](#), dated October 2022*)

- h) The Pre-Inspection document is required every time a new Accessibility Assessment is requested.
- i) **ASSIGNED CONTRACTOR:** The **Assigned Contractor** box should be left empty. The Accessibility Contractor will fill in this box.
- j) **SAVE**

IMPORTANT

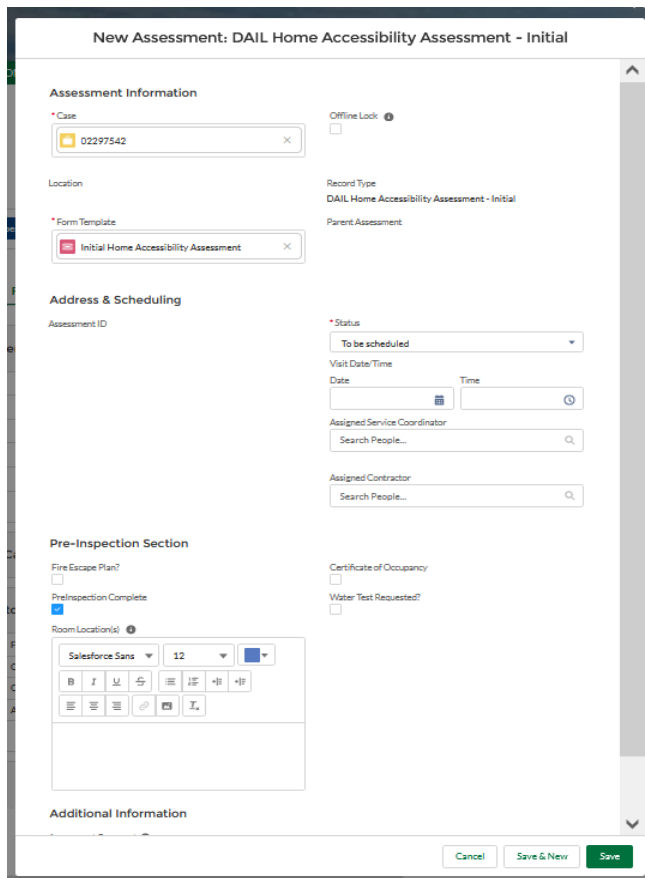
Only INITIAL assessment templates should be selected in this step. Be sure the template chosen in this step is the same as the one chosen in the **Record Type**.

The Accessibility Contractor does **not** see the same information in the Portal as the Agency, and will only know if an **Accessibility Assessment** is ready to be scheduled if the Status is changed to **TO BE SCHEDULED**,



The image shows a 'New Assessment' dialog box with the following content:

- Header: New Assessment
- Section: Select a record type
- Options:
 - DAIL Home Safety Assessment -Initial
 - DAIL Home Accessibility Assessment - Follow Up
 - DAIL Home Accessibility Assessment - Initial
 - DAIL Home Safety Assessment - Follow up
 - DAIL Home Safety Assessment Single Room/Bedroom
- Buttons: Cancel, Next



The image shows a 'New Assessment: DAIL Home Accessibility Assessment - Initial' form with the following sections:

- Assessment Information**
 - * Case: 02297542
 - Location: [Empty]
 - * Form Template: Initial Home Accessibility Assessment
 - Record Type: DAIL Home Accessibility Assessment - Initial
 - Parent Assessment: [Empty]
- Address & Scheduling**
 - Assessment ID: [Empty]
 - * Status: To be scheduled
 - Visit Date/Time: [Empty] [Empty]
 - Assigned Service Coordinator: Search People...
 - Assigned Contractor: Search People...
- Pre-Inspection Section**
 - Fire Escape Plan?:
 - Preinspection Complete:
 - Room Location(s): [Rich text editor with font size 12]
 - Certificate of Occupancy:
 - Water Test Requested?:
- Additional Information**
- Buttons: Cancel, Save & New, Save

Step 3 - Schedule Information

- **Visit Date/Time** – The Accessibility Contractor will contact the agency to coordinate a Visit Date/Time. The Accessibility Contractor will enter this information into the Assessment. Once the **Visit Date/Time** is entered, the **Status** of the **Assessment** will change to **Scheduled**.

The Accessibility Assessment is ready to be completed by the Accessibility Contractor. An agency representative, and the Shared Living Provider are required to be at the home during the Assessment.

Repeat these steps for each Accessibility Assessment needed for the Participants at the location.

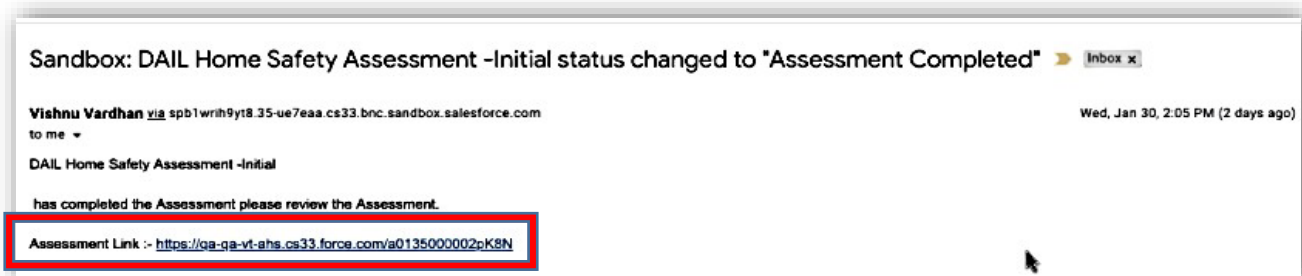
Assessment Results

Once the Accessibility Contractor has finished the Accessibility Assessment and has uploaded the results into the Portal, the Agency will receive an e-mail notification through the system to view the results. The notification will look like the example screen shot below.

If **ALL of the Assessments are Approved** (Home Safety Assessment and Accessibility Assessment), the Provider Agency **Approves the Case**. (See **Approving a Case**)

If the Accessibility Contractor requires or recommends home modifications, they will enter the items as non-compliant on the Assessment, see section on **Non-Compliant Assessment Items**.

Example: System generated e-mail and sent to Agency staff when the Contractor enters the Assessment information. Click **ASSESSMENT LINK** to log into the Assessment and view the results.



Non-Compliant Accessibility Assessment Items

If the Accessibility Contractor finds home modifications are required or recommended during the Accessibility Assessment, the Status of the Assessment will be **“Inspected with Non-Compliant.”**

To review the Non-Compliant Items, from the **Assessment** click **NONCOMPLIANT ITEMS**.

HOME LOCATIONS ASSESSMENTS

Assessment
AID-003806

+ Follow **Non Compliant Items** Request Follow Up Edit

DETAILS RELATED

Record Type
DAHL Home Safety Assessment -Initial

Case
00002250

Status
Parent Assessment

Form Template
Initial Home Safety Assessment

Participant Name
Smith

Activity Summary

Pre-Inspection Section

Fire Escape Plan?

Certificate of Occupancy

Preinspection Complete

Water Test Requested?

Room Location(s) 0

Scheduling Information

Visit Date/Time
2/2/2019 3:00 PM

Number of Assessment Items
94

Estimated Deadline

Number of noncompliant Items
3

Assigned Contractor
Mark Evergreen Contractor

Number of Variance Items
0

Post

Share an update... Share

Search this feed...

Amber DeVoss (Vermont Agency of Human Services) updated this record. 2m ago

Assessment ID
A blank value to AID-003806

Like Comment

Write a comment...

Code	Description	Agency and SLP Responsibility
Red = Immediate Action	Any immediate health or safety risks with potential legal implications.	Agencies must ensure that immediate action is taken to make these corrections or a plan in place to ensure safety until the correction is made. Agencies must incorporate a safety plan within the plan of action.
Yellow = Required	All improvements that will have a considerable impact increasing safety and promoting independence.	Agencies will ensure these required corrections are completed within the 45-day timeline allotted to complete the Assessment.
Green = Encouraged	Medium level solutions requiring extensive modifications to the home.	Agencies and SLP's may choose to make these recommendations or not.
Blue = Innovative	Innovative (blue sky thinking) approaches that may be of benefit.	Agencies and SLP's may choose to make these recommendations or not.

Addressing Non-Compliant Items

The Provider Agency is required to upload an **Agency Accessibility Modification Plan and Request for Reimbursement form** into the **Related** tab of the Accessibility Assessment.

The Plan is required to be uploaded for any Initial Assessment that is Inspected with Non-Compliant items, even if the items are only recommended (Encouraged or Innovative).

There are two ways to resolve non-compliant Assessment items:

- **Initiate Home Modifications:**
 - All Immediate Action or Required items must have home modifications completed. The Agency should work with the homeowner to complete the home modifications within 45 days of the Assessment.
 - Encouraged (Green) or Innovative (Blue) items may, or may not, have home modifications made. This is at the discretion of the Agency and Shared Living Provider.

- **Request a Variance:**

Please see instructions for requesting a variance in the DAIL Housing Inspection and Accessibility Portal Manual for Agency Providers. Note: As the Assessment is person-centered, it is expected that a variance to the assessment will be a rare occurrence.

If a variance is requested on an item and the variance is denied, a home modification will be necessary for that non-compliant item.

All Immediate Action or Required home modifications must be completed, and any Variance requests reviewed and approved, **before** creating a follow-up assessment in the Portal.

Scheduling a Follow Up Assessment

After the Agency has verified the completion of all the home modifications and any Variances have been requested and approved, the **Follow Up Accessibility Assessment** is created in the Housing Portal.

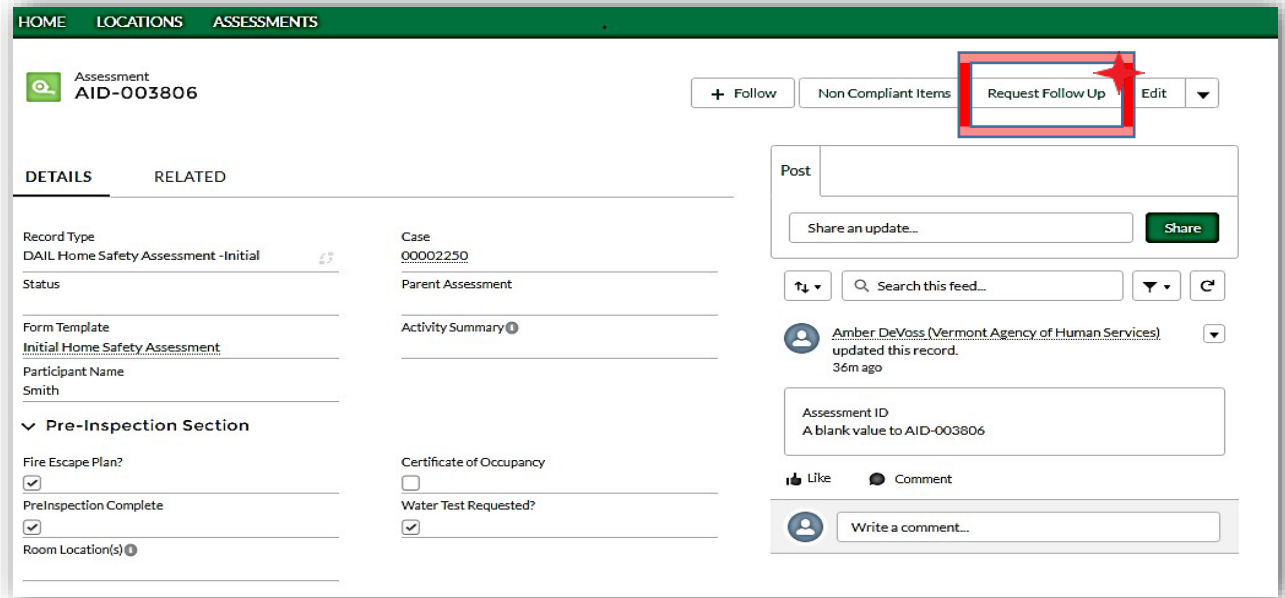
REMINDER: **RED** and **Yellow** non-compliant items are **required to be completed**. Any **Green** or **Blue** non-compliant items are **recommended** and the Agency and SLP may choose to complete these or not.

IMPORTANT

ALL Non-Compliant items on the Initial Assessment, even the Encouraged or Innovative items the Agency and Shared Living Provider choose *not* to make, need to be changed to Initiate Home Modification before the Follow-up Assessment is created.

The follow-up Assessment should always be created from the initial assessment
By using the **REQUEST FOLLOW UP** button.

There should **NEVER** be more than one Follow-up Assessment for each initial assessment.



Follow-up Accessibility Assessment

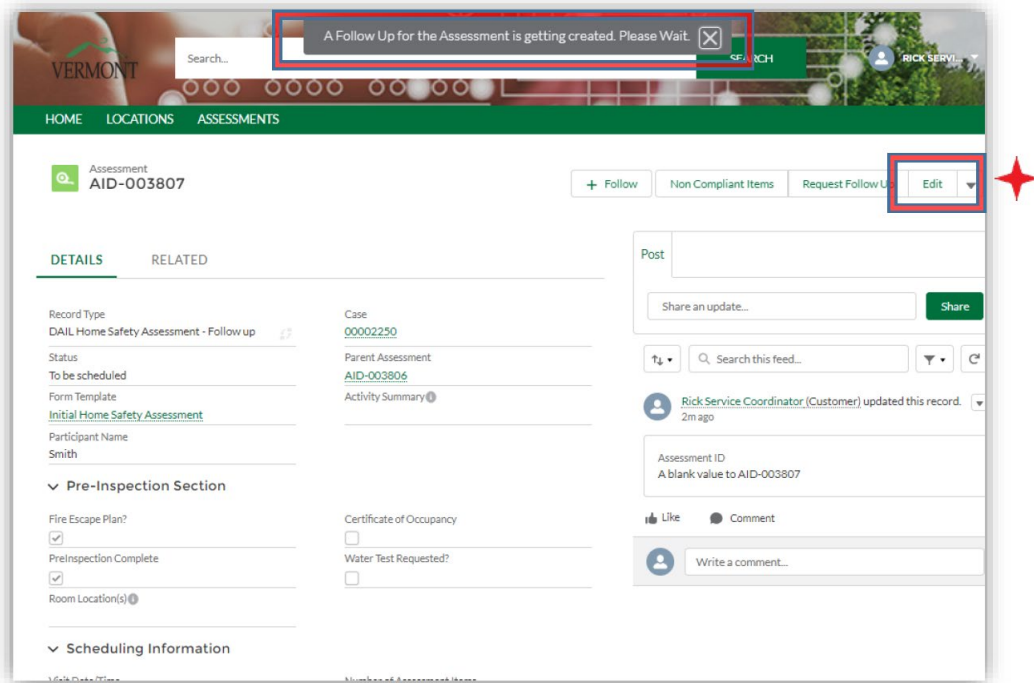
ALL Non-Compliant items on the Initial Assessment, *even the Encouraged or Innovative items the Agency and Shared Living Provider choose **not to make***, need to be changed to Initiate Home Modification before the Follow-up Assessment is created.

- **REQUEST FOLLOW UP:** Click on the **Request Follow Up** button and the system will generate the follow-up Assessment.

It may be necessary to refresh your browser to see this – please **do not** click the button twice as it will create two follow-up assessments.

- **STATUS:** The **Status** should be changed to: **To Be Scheduled**.
- **SCHEDULING:** The Accessibility Contractor will contact the agency to coordinate a Visit Date and Time.
VISIT DATE/TIME: The Accessibility Contractor will enter this information into the Assessment. Once the **Visit Date/Time** is entered, the **Status** of the **Assessment** will change to **Scheduled**.

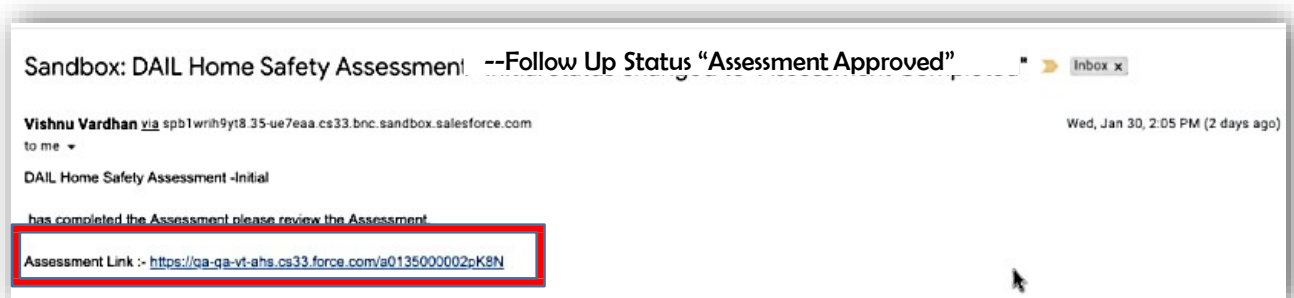
The Follow-up Accessibility Assessment is ready to be completed by the Accessibility Contractor. An agency representative, and the Shared Living Provider are required to be at the home during the Follow -up Assessment.



Once the Accessibility Contractor has completed the Follow-Up Assessment and all items are **“Compliant”** you will receive Notification that the Assessment was **Approved**.

If **ALL** the Assessments, Home Safety Assessment and any Accessibility Assessments, are Approved, the Agency will Approve the Case (See Approving a Case)

Example: System generated e-mail sent to the Agency staff when the Contractor enters the Assessment information, and the Assessment is Approved.



Approving a Case

If the Accessibility Contractor finds the home fully accessibility for the Participant, the Contractor will **Approve** the Accessibility Assessment.

- The Provider Agency **Approves** the **Case IF**:
 - **ALL of the Assessments are Approved** in the current Case (Home Safety Assessment and Accessibility Assessment); or
 - The current Case with the Accessibility Assessment is Approved and there is an Approved, non-expired Home Safety Assessment
- A Case can **NOT** be Approved if:
 - The Accessibility Assessment that has not yet been Approved;
 - There is not an Approved, non-expired, Home Safety Assessment for the Location.

To Approve a Case:

- Open the **Case** and update the case status from **Open** to **Approved** on the bar across the top;
- Click **Mark Status as Complete**

IMPORTANT

A Case can **NOT** be approved if there are **any** Assessments that have not yet been Approved in that Case, or if there is not an Approved, non-expired, Home Safety Assessment for the Location.

The screenshot displays the Vermont Agency Portal interface for a Case. At the top, there is a navigation bar with 'HOME', 'LOCATIONS', 'ASSESSMENTS', and 'TASK'. Below this, the Case details are shown, including a 'Case' header with a '+ Follow', 'Edit', 'Submit for Approval', and 'Print Record' menu. The Case details include Priority: Medium, Status: Open, and Case Number: 02297542. A progress bar at the top shows the current status 'Open' and a 'Mark Status as Complete' button. Below the progress bar, there are tabs for 'DETAILS' and 'RELATED'. The 'DETAILS' tab is active, showing 'Location & Participant Information' with fields for Participant Name (Lisa Test), Case Number (02297542), Location, Status (Open), Program (Home and Community Based Services - DDSD), and Assessment Expiration Date.

Re-Inspection (5 year or when required)

A new Accessibility Assessment will need to be completed every 5 years, as long as the Participant with mobility or accessibility needs is living in the home. *The Provider Agency is responsible to track the reassessment process and will have 90 days to complete the Accessibility Assessment.*

A new Accessibility Assessment may also be requested by the DAIL Quality Management Reviewer or Provider Agency within 5 years, if there was significant construction that changed areas of the home that were previously assessed in relation to the mobility of the participant or if the participant has new or altered mobility needs. (See the Housing Safety and Accessibility Inspection Process Protocol.) In these situations, the Provider Agency must contact DAIL prior to initiating the process.

5-Year Re-Inspection

Follow the steps above to complete a new Accessibility Assessment.