



DAIL HOUSING INSPECTION AND ACCESSIBILITY
PORTAL MANUAL
PROVIDER AGENCY



August 2020
(With added addendums)

Table of Contents

| | |
|---|----|
| Portal Information (See separate document, Getting Started, dated April 2023)..... | 3 |
| Home Screen (See separate document, Getting Started, dated April 2023)..... | 3 |
| Easy Access Reports (See separate document, Printing Assessment, Case and Reports dated March 2023) | 3 |
| Navigation Menu (See separate document, Getting Started, dated April 2023)..... | 3 |
| Overall Process Flow (See separate document, Getting Started, dated April 2023)..... | 3 |
| Location..... | 4 |
| Step 1 - Home Provider Name..... | 7 |
| Step 2 – Provider Agency | 8 |
| Step 3 – Location Address..... | 8 |
| Address Naming Standard..... | 8 |
| Creating a Case..... | 9 |
| Step 1 – Enter Participant Name | 12 |
| Adding a New Participant..... | 12 |
| Step 2 - Check for Current Home Safety Assessment and Expiration Date..... | 14 |
| Step 3 - Check for Accessibility Assessment | 15 |
| View an Existing Assessment (Home Safety or Accessibility) | 17 |
| Assessment - Home Safety (See separate document Agency Portal User Manual: Accessibility Assessment – Accessibility Project for information on Accessibility Assessments)..... | 17 |
| Pre-Inspection Tasks | 20 |
| Requesting a Home Safety Assessment (See separate document Agency Portal User Manual: Accessibility Assessment – Accessibility Project for information on Accessibility Assessments)..... | 20 |
| Step 1 – Pre-Inspection Section..... | 20 |
| Step 2 – Creating An Assessment | 20 |
| Step 3 - Schedule Information | 22 |
| Step 4 – Contact Housing Contractor | 22 |
| Step 5 – Enter Assessment Date/Time..... | 22 |
| Documents (See separate document, Naming Conventions: Documents, dated October 2022) | 24 |
| Assessment Results | 24 |
| Approving a Case | 24 |

- Non-Compliant Assessment Items 25
 - Resolve Non-Compliant Items (Request Variance or Initiate Home Modifications)..... 26
 - Request A Variance 27
 - Review Variance Decision 28
 - Variance Approvals 30
 - Variance Denials/More Information Needed..... 30
 - Scheduling a Follow Up Assessment..... 31
 - Approving a Case 34
- Re-Inspection (5 year or when required)..... 37
 - 5-Year Re-Inspection 37
 - Other Re-Inspections 38
- Placing Multiple Individuals at One Location/Moving Participant into an Existing Location..... 38
 - Create a Case for Additional Participants at One Location..... 39
 - Home Safety Assessment Approved and an Accessibility Assessment is NOT required 39
 - Home Safety Assessment Approved and an Accessibility Assessment IS required 41
- Shared Location: Requesting Access of a Location Used by Another Agency (*See separate document, Shared Location, dated April 2023*)..... 41
- Certificate of Occupancy or Residency (*See separate document on Certificate of Occupany or Residency dated September 2023*) 41
- Printing a Case, Assessment, or Record (*See separate document, Printing Assessment, Case and Reports dated March 2023*) 41
- Print Case Function (*See separate document, Printing Assessment, Case and Reports dated March 2023*) 41
- Print Assessment Items (*See separate document, Printing Assessment, Case and Reports dated March 2023*) 41
- Print Case Record (*See separate document, Printing Assessment, Case and Reports dated March 2023*) 41
- Closing a Case (*See separate document, Closing a Case, dated January 2023*)..... 41
- Emergency Placement 42
- Reports (*See separate document, Print Assessment, Case, and Reports Documents, dated March 2023*) 44

The DAIL Housing application and process is continually evolving to improve the process. There may be some areas in this manual that have been updated since its publishing. The Service Coordinator should contact the Super User at their agency to obtain any updates to this information.

Portal Information *(See separate document, Getting Started, dated April 2023)*

Home Screen *(See separate document, Getting Started, dated April 2023)*

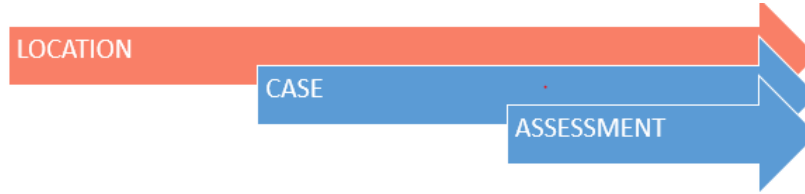
Easy Access Reports *(See separate document, Printing Assessment, Case and Reports dated March 2023)*

Navigation Menu *(See separate document, Getting Started, dated April 2023)*

Overall Process Flow *(See separate document, Getting Started, dated April 2023)*

Location

Remember the overall process: First create a **Location**, then add a **Case** to the Location, lastly add an **Assessment** to the Case.



From the home screen Click on **LOCATIONS** tab in the Navigation Menu - A list of the locations in which you have access will appear.

IMPORTANT

Always search for the location before adding it into the system. If the location already exists, do **not** enter it into the system again.

Click on the **SEARCH LOCATION** button to the right and the screen below will appear.

HOME LOCATIONS ASSESSMENTS

Vermont AHS

Welcome to the Agency of Digital Services. We are a team of information technology professionals providing services and resources to our partners in state government of the residents, businesses and visitors of the State of Vermont.

Assessments
All Assessments ▼ New

5 items • Sorted by Participant Name • Filtered by all assessments • Updated a few seconds ago

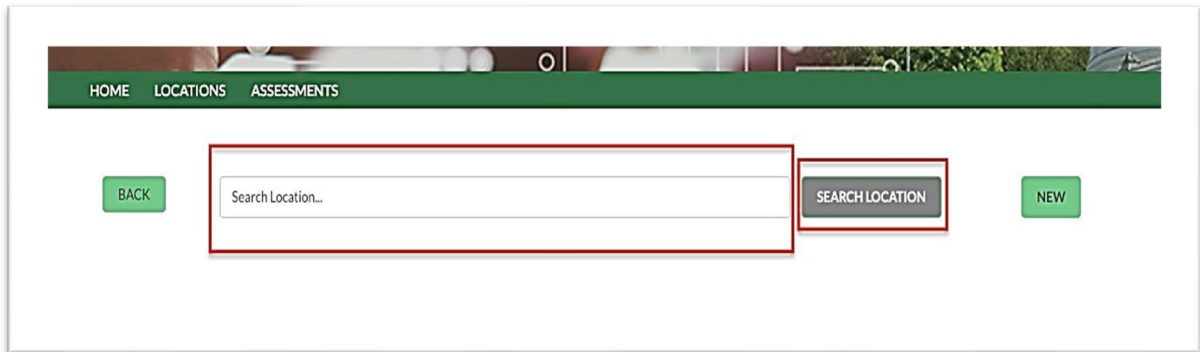
Search this list

| | PARTI... ↓ | ASSESS... ▼ | RECORD TYPE ▼ | STATUS ▼ | VISIT DATE/TI... ▼ |
|---|------------|-------------|----------------------------------|----------------------|--------------------|
| 1 | Test | AID-000045 | DAIL Home Accessibility Asses... | Scheduled | 1/15/2019 12:00 PM |
| 2 | Test | AID-000047 | DAIL Home Safety Assessment ... | Scheduled | 1/15/2019 12:00 PM |
| 3 | Done | AID-000046 | DAIL Home Safety Assessment | Assessment Requested | |

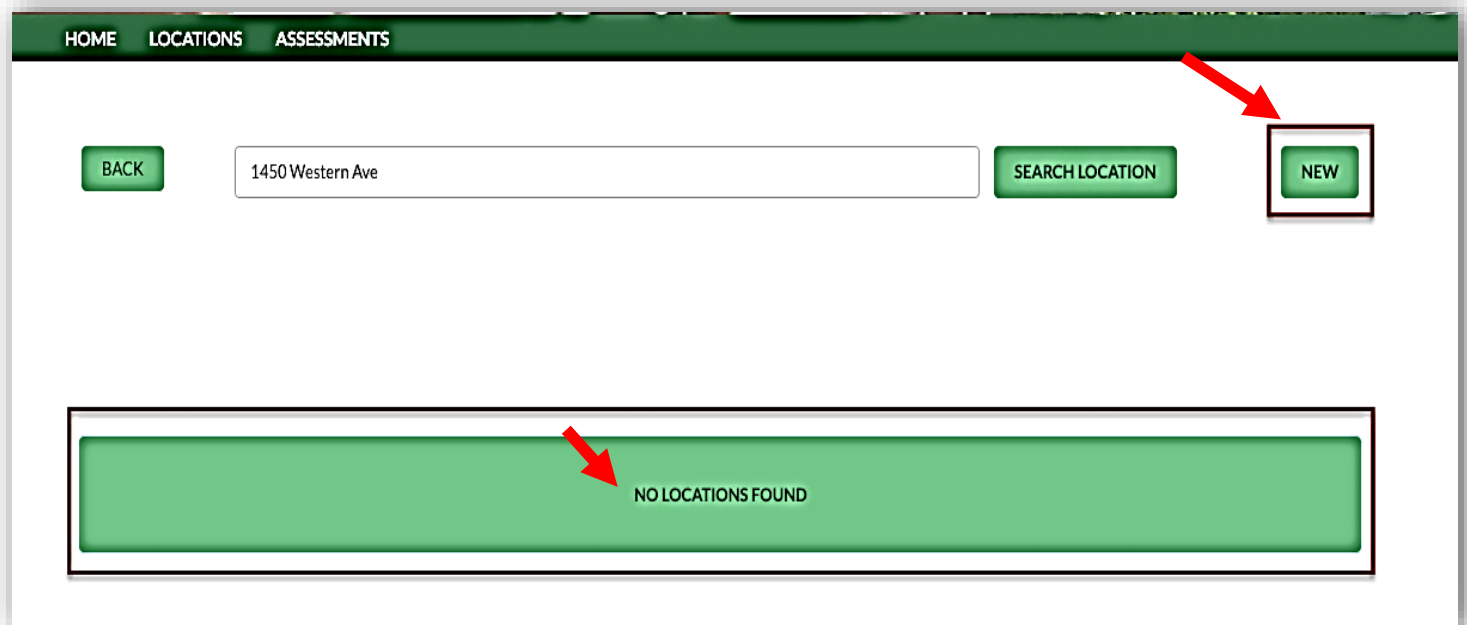
When searching for a location in the system, enter only the street number and name. Do **not** enter the street suffix (Road, Rd, Street, Str., etc.) as different permutations may exist.

Enter the location in the search field and click **SEARCH LOCATION**.

| | |
|--|-----------|
| Searching for an address. Less info is better! | |
| 123 School | Correct! |
| 123 School Street | Incorrect |
| 123 School Street, Barre VT | Incorrect |



- If the **location** IS found, go to section on **Creating A Case**.
- If the **location** is not found, click **NEW** on the right-hand side.



Complete the fields according to the steps below and click on the **SAVE** button on the bottom right. The fields with red ✦ must be entered for users to save the record.

New Location

Information

Location Number

* Home Provider Name

Click New Contact

Is Location Leased

Provider Agency

Start typing the name of your agency (eg. Howard Center), click on your agency when it comes up

Rick Test Service Coordinator
Howard Center (HC)

+ New Contact

Assessment Dates

First Assessment Date

Assessment Expiration Date

Last Assessment Date

Location Address

* Physical Address

City

Enter address using
the standards below

Mailing State/Province

Mailing Zip/Postal Code

* County

Mailing Country

None

System Information

Cancel

Save & New

Save

Step 1 - Home Provider Name

In the **Home Provider Name** field, start typing the home provider's name. NOTE: You may need to try typing the provider's name a few different ways, example: Robert, Bob, Rob; or Chris, Christopher, etc.

- If the name is already in the system, it will show. **Click** on the name and proceed to the next step.
- If it is not in the system, Click **NEW CONTACT**.
- If the home is an agency staffed home, the Home Provider Name of "Staffed Home" should be chosen.

Add a New Home Provider

Complete the fields for the **New Contact** and click the **SAVE** button on the bottom right. The fields with red ✨ MUST be entered for users to save the record.

- Account Name for a Home Provider is always Citizen Provider

After **New Contact** information is entered, Click **SAVE**

The screenshot shows a 'New Contact' form with the following fields and annotations:

- Contact Information** (Section Header)
- *Name** (Required field)
- Salutation** (Dropdown menu, currently set to "--None--")
- Contact Owner** (Text field, value: Amber DeVoss)
- First Name** (Text field, highlighted with a yellow box and a red star icon ✨. A yellow callout box next to it says "Always enter full name (eg. Johnathan vs. John)").
- Middle Name** (Text field)
- *Last Name** (Required field, highlighted with a yellow box and a red star icon ✨).
- Suffix** (Text field)
- *Account Name** (Required field, highlighted with a yellow box and a red star icon ✨. The value is "Citizen Provider").
- Reports To** (Text field, value: Search Contacts... with a search icon)
- Title** (Text field)
- Department** (Text field)
- Email** (Text field)
- Fax** (Text field)
- Phone** (Text field, highlighted with a red star icon ✨. A yellow callout box with a red border says "Phone number is required, and e-mail if available").
- Location** (Text field)

At the bottom right, there are three buttons: "Cancel", "Save & New", and "Save" (highlighted with a red star icon ✨).

Step 2 – Provider Agency

Start typing the name of the agency (ex: Howard) and **Click** on the agency name when it appears on the list.
Note: You should never have to type in the agency name.

Step 3 – Location Address

Using the **Naming Standard** below, type the 911 address of the home.

- The State/Province should always be the abbreviation, capitalized (i.e. VT, NH, etc.)

Address Naming Standard

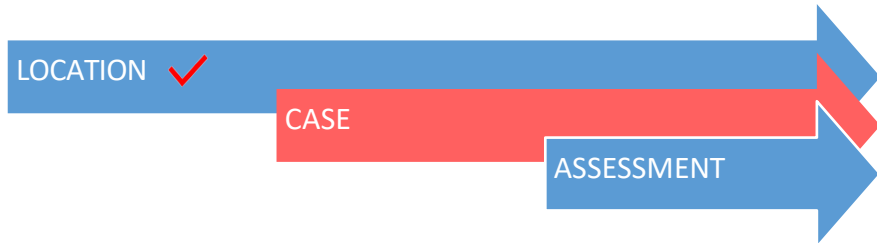
Do not use “.” or “#”. The only abbreviations that are allowed are VT and Apt.

| | USE THIS | Comments | Example |
|-----------|----------|---|---|
| Apartment | Apt | Do not use “.” at the end | Apt 1 |
| Avenue | Avenue | | 24 Prospect Avenue |
| East | East | | 24 East Prospect Road |
| Highway | Highway | | 24 Prospect Highway |
| Lane | Lane | | 24 Prospect Lane |
| Lot | Lot | Do not use “#” | 24 Prospect Road, Lot 1 |
| North | North | | 24 North Prospect Road |
| Number | | Enter number/letter only; do not use any symbol | Apt A, Apt 1, Lot 1, Unit 1 |
| Parkway | Parkway | | 24 Prospect Parkway |
| Road | Road | | 24 Prospect Road |
| Route | Route | Do not use “VT” or “US” before the Route | Route 14 |
| Saint | Saint | | 24 South Prospect Road, Saint Johnsbury |
| South | South | | 24 South Prospect Road |
| Street | Street | | 24 Prospect Street |
| Unit | Unit | Do not use “#” | 24 Prospect Street, Unit 4 |
| Vermont | VT | Both capital; Do not use “.” at the end | |
| West | West | | 24 West Prospect Road |

Step 4 – Click SAVE to save the Location.

Creating a Case

The Location **MUST** be in the database before a **Case** can be created.



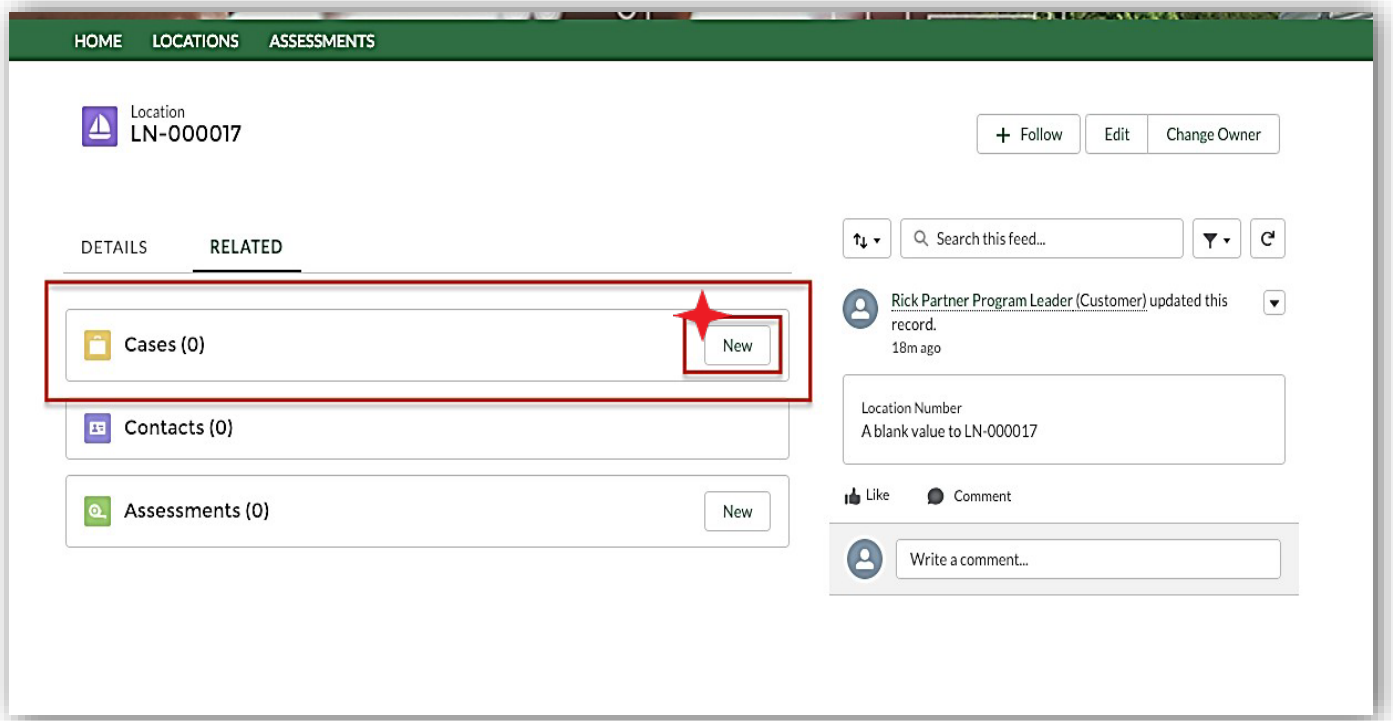
From the **Location** screen/window, click the **RELATED** tab.


The screenshot shows a web application interface for a 'Location' record. At the top, there is a navigation bar with 'HOME', 'LOCATIONS', and 'ASSESSMENTS'. Below the navigation bar, the page title is 'Location LN-000017'. There are two tabs: 'DETAILS' and 'RELATED'. The 'RELATED' tab is highlighted with a red border and a red star icon. Below the tabs, there are several fields for location information:

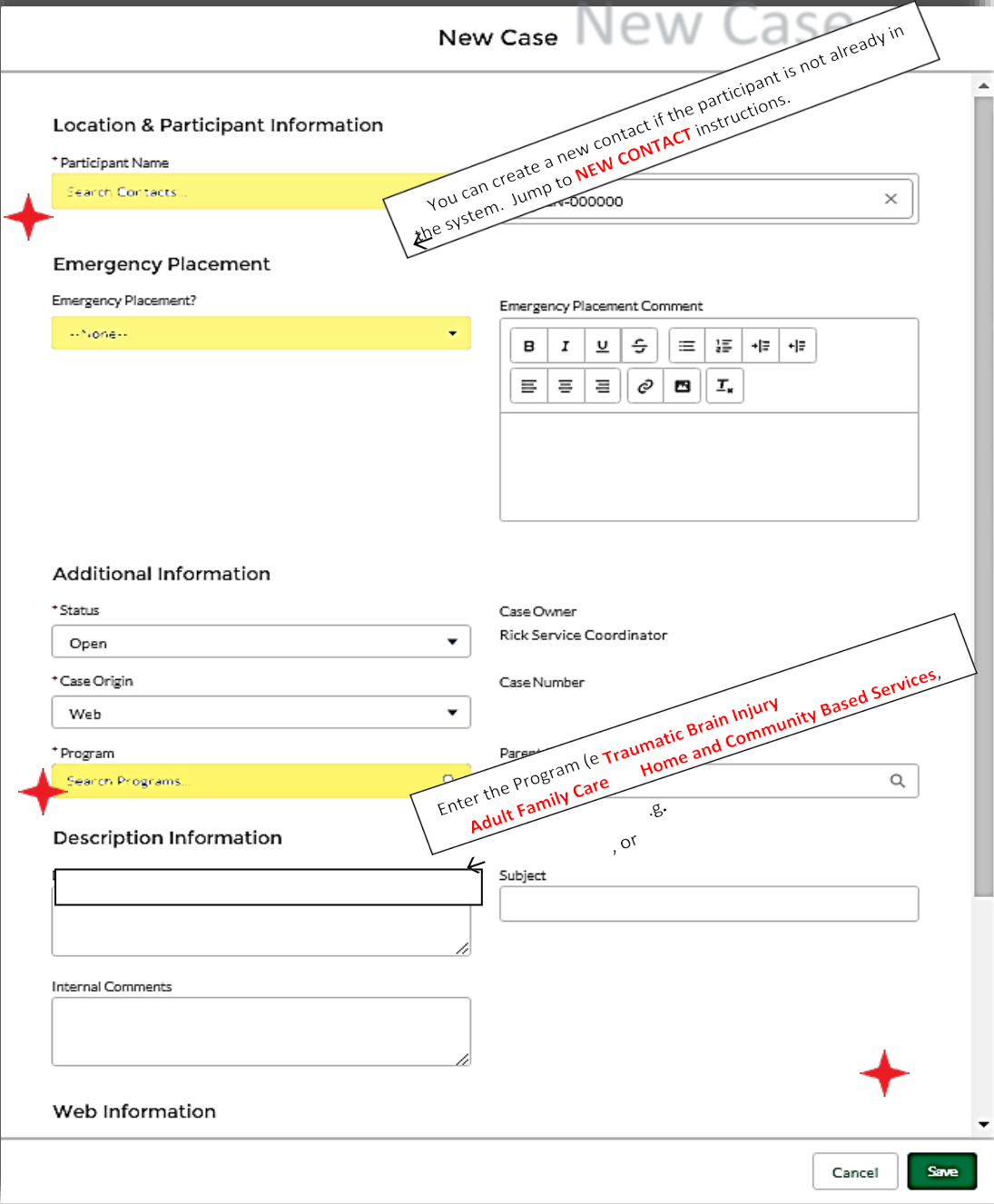
| | |
|--|---------------------------------|
| Location Number LN-000017 | Home Provider Name Demi Demo |
| Is Location Leased <input type="checkbox"/> | Property Type Single family |
| Provider Agency Adult Services Division | |

At the bottom, there is a section for 'Assessment Dates' with a downward arrow icon.

- If there IS a **Case** already in the system, go to section on **Check for Current Home Safety Assessment and Expiration Date**
- If the **Case** is not found in the system, go to the **CASES** section, Click **New** and follow the steps below:




Complete the fields according to the steps below and click on the **SAVE** button on the bottom right. The fields with red  must be entered for users to save the record.




New Case

Location & Participant Information

* Participant Name
 Search Contacts...

Emergency Placement

Emergency Placement?
 --None--

Emergency Placement Comment
[Rich text editor with icons for Bold, Italic, Underline, Link, etc.]


Additional Information

* Status

Case Owner
Rick Service Coordinator

* Case Origin

Case Number

* Program
 Search Programs...


Enter the Program (e.g. Traumatic Brain Injury, Adult Family Care, Home and Community Based Services, ...)

Description Information

Subject

Internal Comments

Web Information



Step 1 – Enter Participant Name

Start typing the **Participant's Name**. If the Participant is already in the system, it will appear. NOTE: You may need to try typing the participant's name a few different ways, example: Robert, Bob, Rob; or Chris, Christopher, etc.

- If the Participant IS in the system, click on the Participant's name to choose that participant.
 - Note: If there are two Participants in the system with the same name, contact DAIL before proceeding.
- If the Participant is NOT in the system, click **NEW CONTACT** (See section on **Adding a New Participant**)

Adding a New Participant

Complete the fields for the New Contact and click the **SAVE** button on the bottom right. The fields with red ✨ MUST be entered for users to save the record.

- Account Name for a Participant is always **Citizen Public**.

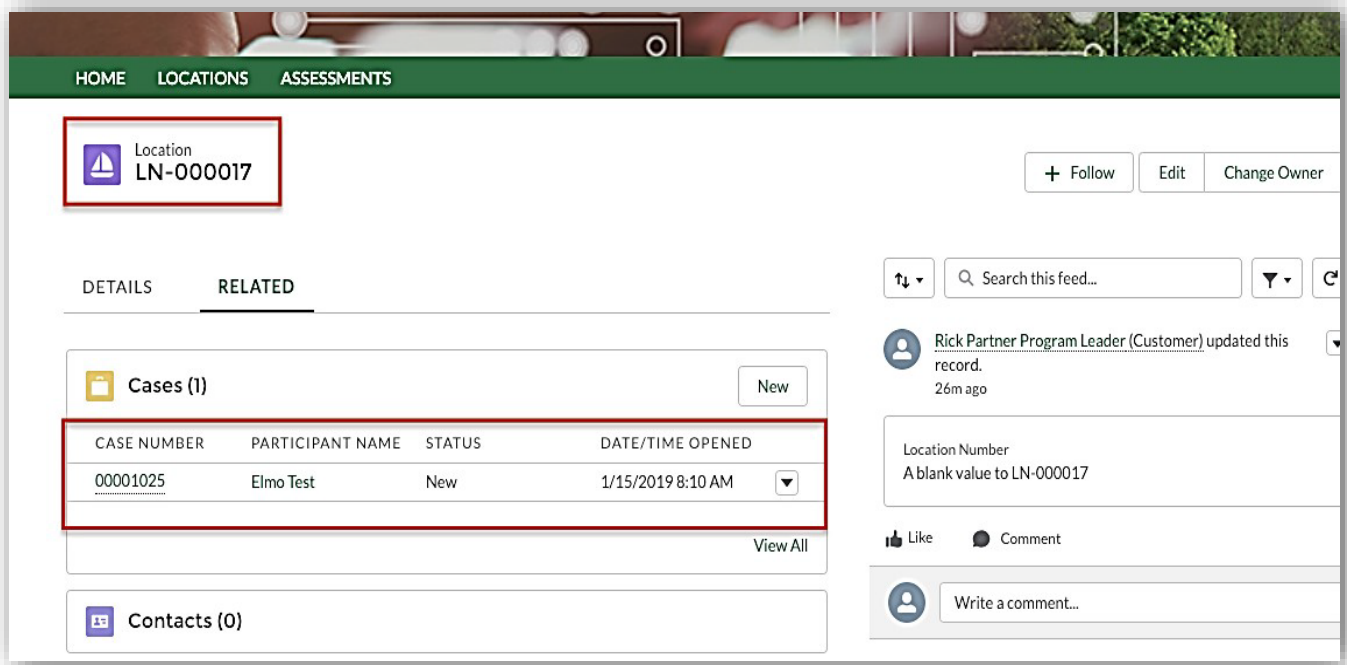
After the **New Contact** information is entered, Click **SAVE**.

The newly created **CASE** is now related to the **LOCATION**

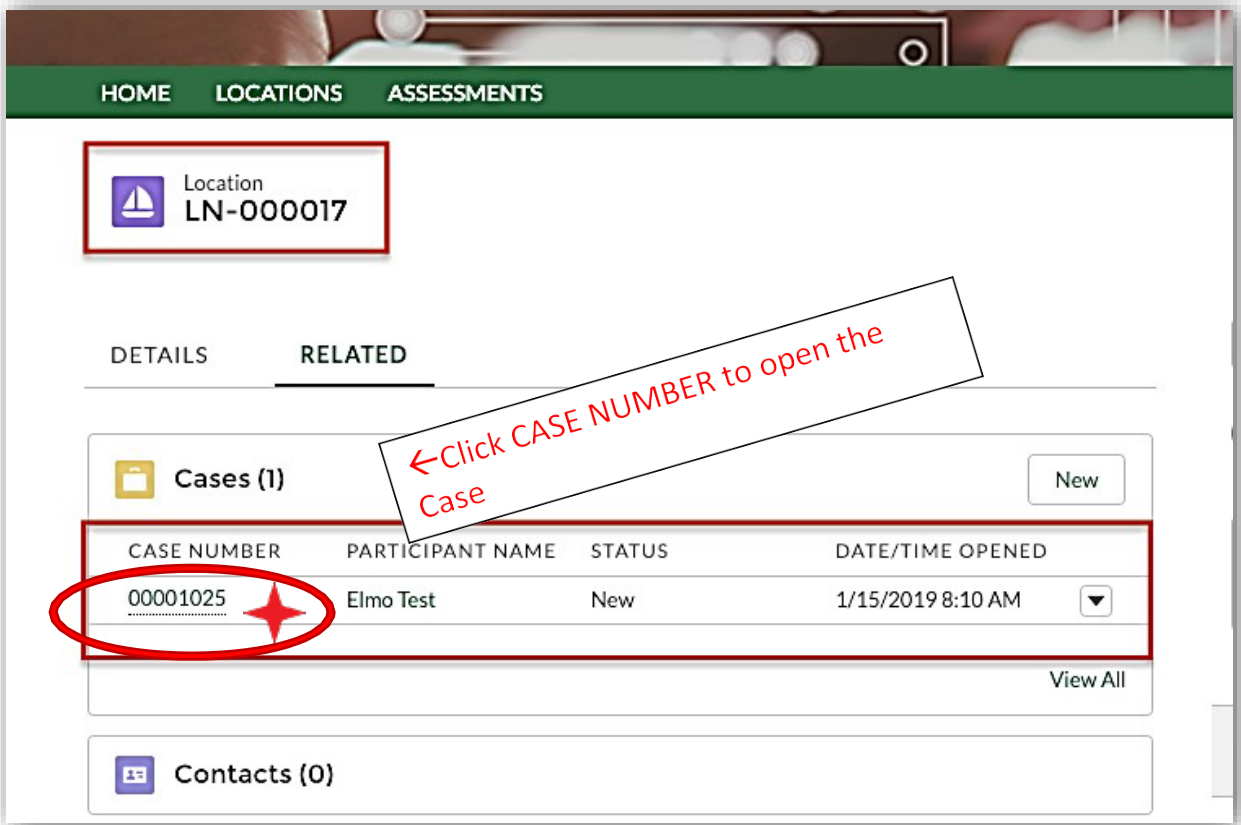
The screenshot shows a 'New Contact' form with the following fields and values:

- Contact Information**
 - *Name: (empty)
 - Salutation: --None--
 - First Name: (empty)
 - Middle Name: (empty)
 - *Last Name: (empty)
 - Suffix: (empty)
- Account Name**: Citizen Public (highlighted in yellow)
- Reports To**: Search Contacts... (with magnifying glass icon)
- Title**: (empty)
- Department**: (empty)
- Email**: (empty)
- Fax**: (empty)
- Phone**: (empty)
- Location**: (empty)

At the bottom right, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The 'Save' button is highlighted in blue and has a red star icon next to it.



To open the **Case**, click the **CASE NUMBER**.



Step 2 - Check for Current Home Safety Assessment and Expiration Date

To check for a current Home Safety Assessment and expiration date go to the **Case** and check the **ASSESSMENT EXPIRATION DATE**. Note: If there is more than one Case (i.e. Participant at that Location), only one Home Safety Assessment is necessary for a Location and the Assessment may be found under the other participant's **Case**.

- If the **Assessment Expiration Date** has not expired, a Home Safety Assessment is not required because the **Location** already has a current **Home Safety Assessment** (exceptions listed below);
 - Exceptions: A new **Home Safety Assessment** may be required prior to an **Assessment Expiration Date** if the DAIL Quality Reviewer is requesting a new home assessment, or if the homeowner has made home modifications and the home needs to have a new assessment completed. For these instances, contact DAIL before proceeding any further.
 - A new **Accessibility Assessment** MAY still be requested if the date of the Home Safety Assessment has not expired. Follow the steps under **Creating a New Assessment**.
- If the **Assessment Expiration Date** is blank, or the expiration date has passed, then a new **Home Safety Assessment** needs to be created and scheduled;
 - Note: A new **Home Safety Assessment** cannot be created if there is a Home Safety Assessment with an expiration date in the future. DAIL's Housing Policy will allow a 90-day grace period after the **Home Safety Assessment** expires to complete a new **Home Safety Assessment**. (Exceptions to this are listed above.)
 - If needed, whenever possible, the **Accessibility Assessment** should be requested at the same time as the **Home Safety Assessment**.

IMPORTANT:

A new Home Safety Assessment should **NOT** be added to the current case.

A new **Case** needs to be created for a new **Home Safety Assessment**.

If there is more than one Case (i.e. Participant at the Location), only one Home Safety Assessment is necessary for the Location. The Home Safety Assessment for that location may be found under the other participant's case.

The screenshot displays the Vermont Home Safety Assessment system interface. At the top, there is a search bar and a user profile for 'CHIQUITA S...'. The navigation menu includes 'HOME', 'LOCATIONS', 'ASSESSMENTS', and 'TASK'. The main content area shows a case for 'Maple Participant' with a red circle around the case name. Below the case name, there are buttons for '+ Follow', 'Edit', 'Submit for Approval', and 'Print Record'. The case details include: Program (Traumatic Brain Injury), Assessment Expiration Date (highlighted with a red box), Status (Open), Case Owner (Chiquita ServiceCoordinator), and Account Name (Duxbury Community HomeShare). At the bottom, there is a status bar with buttons for 'Open', 'On Hold', 'Emergency Placement...', 'Approved', 'Closed', and 'Mark Status as Complete'.

Step 3 - Check for Accessibility Assessment

DAIL Housing Safety and Accessibility Inspection Process (in part)

To maximize the individual's independence, all individuals receiving DAIL-funded services should be able to utilize all appropriate spaces in the home they share with a shared living provider. When an individual, who uses a wheelchair, a walker, or has other mobility or accessibility needs (e.g. low vision, hearing loss that affect the individual's ability to freely navigate the home environment), receives home supports funded by the state and/or federal government, an accessibility inspection of the residence is **required**.

The Contractor will conduct the accessibility Inspection using the checklist form provided in the DAIL Housing Portal to evaluate if the home meets the specific ADA accessibility standards and identify areas that are noncompliant as deficiencies. The inspection is of the home, **specific to the home** in terms of the universal ADA standards, not specific to the individual.

NOTE

Accessibility Assessments are done for a home; however, they are only required for homes that have participants in the home that have mobility or accessibility needs. The Accessibility Assessment is requested in the Case of that participant.

If there are multiple participants in the home, only one **Accessibility Assessment** has to be completed on the home; however, an Occupational (OT) or Physical Therapist (PT) must complete an evaluation.

Please see the process for the Housing Portal below, and refer to the **DAIL Housing Safety and Accessibility Inspection Protocol**.

Accessibility Assessments do not have an expiration date; however, a new Accessibility Assessment may be requested if it is found needed (See the exceptions listed below)

- **If an Accessibility Assessment is NOT required, see Step 2.**
- **If an Accessibility Assessment IS required:**
 - Go to the **Case** for the Location and check the **Home Safety Assessment** and **Assessment Expiration Date**. Note: If there is more than one **Case** (i.e. Participant at that Location), the Home Safety Assessment may be with a different participant's Case.
 - If the **Assessment Expiration Date** has not expired, a new Home Safety Assessment is not required because the **Location** already has a current **Home Safety Assessment** (exceptions listed below);
 - A new **Home Safety Assessment** may be required prior to an **Assessment Expiration Date** if the DAIL Quality Reviewer is requesting a new home assessment, or if the homeowner has made home modifications and the home needs to have a new assessment completed. For these instances, contact DAIL before proceeding any further.

- A new **Accessibility Assessment** MAY still be requested if the date of the Home Safety Assessment has not expired. Follow the steps under **Creating a New Assessment**.
 - If the **Assessment Expiration Date** is blank, or the expiration date has passed, then a new **Home Safety Assessment** needs to be created and scheduled along with the **Accessibility Assessment**. (See section on **Creating a New Assessment (Safety/Accessibility)**).
- Go to the **Case** for the Location and the participant in which an Accessibility Assessment is needed to see if an **Accessibility Assessment** has been completed.
 - If an Accessibility Assessment has been completed and has been Approved, a new **Accessibility Assessment** is not required. (Exceptions listed below):
 - Exceptions: A new **Accessibility Assessment** may be required if the DAIL Quality Reviewer or Service Coordinator is requesting a new assessment, or if the homeowner has made home modifications and a new assessment needs to be completed. For these instances, contact DAIL before proceeding any further.
 - If an Accessibility Assessment has not been completed, an **Accessibility Assessment** needs to be created and scheduled. (See **Creating a New Assessment (Safety/Accessibility)**).
- **If an Accessibility Assessment IS required for multiple participants in the home:**

Accessibility Inspection for second or subsequent participant in a home that has previously had an Accessibility Inspection successfully completed:

 - The Provider Agency will enter the Accessibility Assessment under the Case for the additional participant(s);
 - The Assessment Status should be “To Be Scheduled”;
 - After the Assessment is entered, the Provider Agency will notify DAIL, by e-mail, of the Assessment number and the Location number;
 - The Housing Contractor does **not** need to be contacted for a second or subsequent Accessibility Assessment in this situation.
 - DAIL will enter the information from the originating Accessibility Assessment from the same location into the subsequent Accessibility Assessment for the additional participant and will notify the Provider Agency when this has been completed;
 - The Provider Agency will contact a PT or OT to perform a functional evaluation of the additional participant to determine their needs. If there were any deficiencies in the originating Accessibility Assessment, the PT or OT must include in the review their determination of the deficiencies and how they relate to the participant.
 - The Provider Agency will upload the PT or OT evaluation into the Related tab of the Initial Accessibility Assessment for the additional participant and follow the Variance and home modification process for the successful completion of the Accessibility Assessment for this participant.

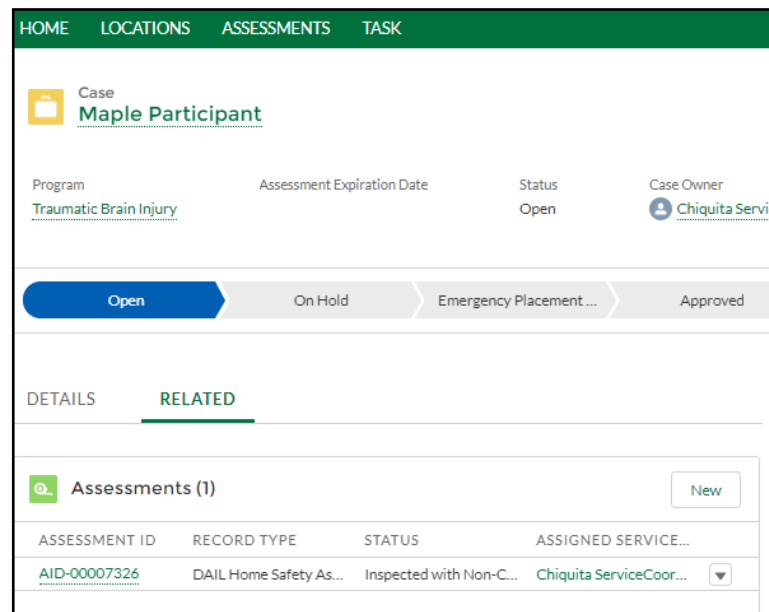
IMPORTANT:

Whenever possible, the **Accessibility Assessment** should be scheduled at the same time as the **Home Safety Assessment**.

If there is more than one Case (i.e. Participant at the Location), only one Home Safety Assessment is necessary for the Location. The Home Safety Assessment for the location may be found under the other participant’s case.

View an Existing Assessment (Home Safety or Accessibility)

To view an Assessment, Click on the **Case number** and with the Case open, click on the **RELATED** tab, and click on the **ASSESSMENT ID**.



Assessment- Home Safety *(See separate document Agency Portal User Manual: Accessibility Assessment – Accessibility Project for information on Accessibility Assessments)*

Please disregard any reference to Accessibility Assessments in this section. For information and process on “Accessibility Assessments”, see separate document [Agency Portal User Manual: Accessibility Assessments - Accessibility Project](#)

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



BEFORE creating and scheduling a new Assessment, check for a current **Home Safety Assessment** and/or **Accessibility Assessment** (See **Check for Current Home Safety** Assessment and Expiration Date, and **Check for Accessibility Assessment**.)

BEFORE initiating contact with the housing contractor or creating a new assessment in the database: The agency **MUST** ensure that the **Pre-inspection Tasks** have been completed for a **Home Safety Assessment** (See **Pre-Inspection Tasks** Section) and all required documents have been obtained and uploaded (See section on **Adding Document to the Assessment**).

NOTE:

These steps must be completed prior to contacting the housing contractor for every new Assessment.

A **DAIL Home Safety Assessment Request for Housing Contractor form** is required to be filled out for each Home Safety Assessment being requested or scheduled.

IMPORTANT

Only **“Initial”** Assessments are created from here. Follow Up Assessments are created within the Initial Assessment Record

The screenshot shows a web form titled "New Assessment". Below the title is a section labeled "Select a record type" with five radio button 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

At the bottom right of the form, there are two buttons: "Cancel" and "Next". The "Next" button is highlighted with a red rectangular box and has a red star icon next to it.

Complete the fields according to the steps below and click on the **SAVE** button on the bottom right. The fields with red ✨ must be entered for users to save the record.

New Assessment

Assessment Information

| | |
|--|--|
| Record Type DAIL Home Safety Assessment -Initial | Case 00001009 |
| *Status Change Status to TO BE SCHEDULED | Participant Name Smith |
| *Form Template Start typing SAF.. Select HOME SAFETY ASSESSMENT | Parent Assessment Search Assessments... |
| + New Form Template | |

Fire Escape Plan?

Preinspection Complete

Room Location(s)

Certificate of Occupancy

Water Test Requested?

Document MUST be uploaded after saving the information on this page.

Scheduling Information

| | |
|---|----------------------------------|
| Visit Date/Time Date Time Estimated Duration | Number of Assessment Items 94 |
| Assigned Service Coordinator Assigned Contractor Search People... | Number of Variance Items 1 |

Assessment Address

Cancel Save & New **Save**

Pre-Inspection Tasks

BEFORE the housing contractor is contacted to schedule an Assessment or an Assessment is entered into the database:

- A Pre-Inspection **MUST be completed** by the agency, and the agency should work with the home provider to correct any easily identifiable non-compliant items (For example, a missing smoke detector, fire extinguisher, missing/broken railings, etc.)
- For Home Safety Assessments, the **Pre-Inspection form, Fire Safety Plan, Water Test** (if applicable), and proof of **Chimney Cleaning** (if applicable) **MUST be uploaded** into the **Related** tab of the **Assessment**.
 - Note: A Water Test is required for any home that is not on a public water source. The agency should work with the home provider to have the testing done timely, in order for the results to be received by the time the housing contractor does the Assessment.
 - Note: A Shared Living Provider must provide documentation to show that any chimney used for wood or wood pellet heat that is being used in the home has been cleaned and inspected by a professional.

NOTE: The **Pre-Inspection Tasks** MUST be completed every time a new Assessment is requested.

Requesting a Home Safety Assessment *(See separate document Agency Portal User Manual: Accessibility Assessment – Accessibility Project for information on Accessibility Assessments)*

Please disregard any reference to Accessibility Assessments in this section. For information and process on “Accessibility Assessments”, see separate document [Agency Portal User Manual: Accessibility Assessments - Accessibility Project](#)

Step 1 – Pre-Inspection Section (See section on **Pre-Inspection Tasks** above which are required to be completed prior to initiating an Assessment with the housing contractor or entering Assessment information into the database.)

Step 2 – Creating An Assessment

- Click the **Case** number and with the **Case** open, click on the **RELATED** tab.
- Go to the **ASSESSMENT** section and click **NEW**, a **NEW ASSESSMENT** screen will appear.
- Select a **RECORD TYPE** of the inspection and click **NEXT**. **Note: Only an INITIAL assessment should be selected in this step.**
- Check the **Pre-Inspection Complete, Fire Escape Plan, Water Test Requested** (if applicable), and **Chimney Cleaning** (if applicable)
 - After completing and saving the information on this page, **these document MUST be uploaded** (see instructions for **Adding Documents to the Assessment**);
 - These documents are required every time a new Safety Assessment is requested.
- Room Location(s) - If specific instructions would be helpful, or there are multiple bedrooms, they can be described in the **Room Location(s)** area in the Pre-Inspection Section.

- Status – The Status should be **To Be Scheduled**.
- FORM TEMPLATE – Type ‘Safety’ or ‘Accessibility’ and select the correct template.

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**.

New Assessment

Select a record type

- 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

Cancel Next

Edit AID-000005

Assessment Information

Record Type: DAIL Home Safety Assessment -Initial
 Case: 00001009
 Status: **To Be Scheduled**
 Participant Name: Smith
 Parent Assessment: Search Assessments...

* Form Template: Initial Home Safety Assessment

Pre-Inspection Section

The Escape Plan?
 PreInspection Complete?
 Certificate of Occupancy
 Water Test Requested?

Room Location(s)

Bedroom #1_ facing house from street- 2nd Floor, right side of house
 Bedroom #2_ facing house from street - 1st Floor, left side of house

< If there are multiple bedrooms you can describe the bedrooms here.

Scheduling Information

Visit Date/Time: Date [] Time []
 Number of Assessment Items: 94
 Estimated Deadline: []
 Number of noncompliant Items: 2
 Assigned Service Coordinator: []
 Number of Variance Items: 1
 Assigned Contractor: Search People...

Step 3 - Schedule Information

- Visit Date/Time – To be entered later, after the Assessment is scheduled. (See section on **Enter Assessment Date/Time**)
- Search for the **ASSIGNED SERVICE COORDINATOR** in the box by typing the first part of their name. A list of contacts with that name will appear. Click on the **Assigned Service Coordinator**.
- **ASSIGNED CONTRACTOR** - The **Assigned Contractor box** should be left empty. The Assessment contractor will fill in this box.

NOTE: If this assessment is related to a **Certificate of Occupancy**, see the instructions for **CERTIFICATE OF OCCUPANCY**.

Step 4 – Contact Housing Contractor

- Agency will contact Housing Contractor to schedule a date and time for the Assessment(s)

Step 5 – Enter Assessment Date/Time

- After a date is established for the Assessment(s), go into the Assessment, then click **EDIT** (upper right-side). You will see the below screen pop-up. Enter the **VISIT DATE/TIME**. **SAVE**.
- **Update the Status to SCHEDULED**. Once the Assessment is in **SCHEDULED** Status, everything is ready for the agency staff to meet the Housing Contractor at the property.

IMPORTANT:

The Housing Contractor does **not** see the same information as the Service Coordinators, and will only know if an **Assessment** is ready to be completed if the Status is changed to **SCHEDULED**, with the **VISIT DATE/TIME** entered.

If a Home Safety Assessment and an Accessibility Assessment is being scheduled, these steps will need to be repeated for each Assessment

HOME LOCATIONS ASSESSMENTS

Assessment
AID-003752

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

DETAILS RELATED

Record Type: DAIL Home Safety Assessment - Initial Case: 00002236

Smith

* Form Template: Initial Home Safety Assessment Parent Assessment: Search Assessments...

Pre-Inspection Section

Fire Escape Plan? Certificate of Occupancy
Preinspection Complete Water Test Requested?

Room Location(s)

Scheduling Information

| Visit Date/Time | | Number of Items |
|------------------------------|---------|---------------------------------|
| Date | Time | |
| 1/23/2019 | 9:00 AM | 2 |
| Estimated Deadline | | Number of noncompliant items: 2 |
| Assigned Service Coordinator | | Number of variance items: 1 |
| Assigned Contractor | | |

← Enter Visit Date and Time

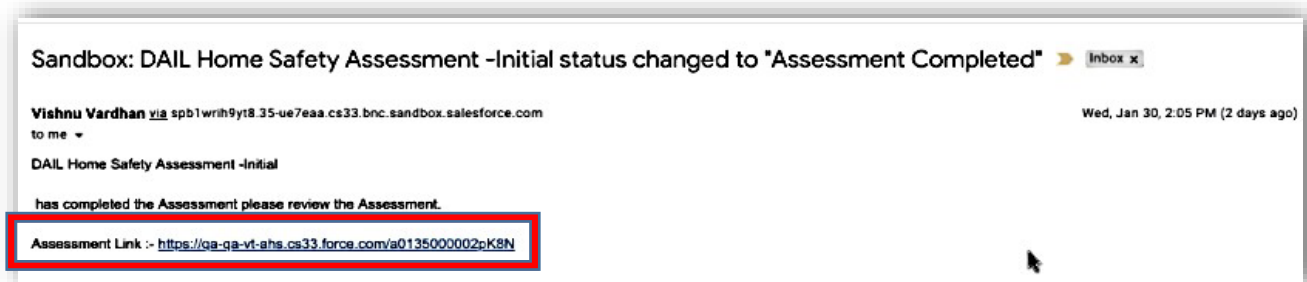
Cancel Save & New **Save**

Documents *(See separate document, **Naming Conventions: Documents**, dated October 2022)*

For information and process on “Documents”, see separate document Agency User Manual, **Naming Conventions: Documents**, dated October 2022

Assessment Results

Once the Housing Contractor has finished the Assessment(s) and has uploaded the results into the database, the Service Coordinator will receive an e-mail notification through the system to view the results. The notification will look like this. Click **ASSESSMENT LINK**.



Approving a Case

If the Housing Contractor finds all the Assessment items are compliant for the Assessment(s) , the Assessment(s) will be **Approved** by the Housing Contractor. If ALL of the Assessments are Approved (Home Safety Assessment and Accessibility Assessment, if applicable), the Service Coordinator needs to approve the **Case**. If the Housing Contractor finds non-compliant items on an Assessment, see section on **Non-Compliant Assessment Items**.

In the case of a Certificate of Occupancy, if the DAIL Quality Management Team finds the information acceptable and the Home Safety Assessment is Approved by DAIL, the Service Coordinator needs to approve the Case.

- To approve the Case, go to the **Case** and then the **DETAILS** tab, **ADDITIONAL INFORMATION**, Click **STATUS** and change it to **APPROVED**.

NOTE

A Case can **NOT** be approved if there are any Assessments that have not yet been Approved. If the Assessment has non-compliant items, please see **Review Noncompliant Assessment Items**.

Non-Compliant Assessment Items

If non-compliant items are found during the Assessment, they will be noted in the **Assessment**.

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
DAIL Home Safety Assessment -Initial

Status

Form Template
Initial Home Safety Assessment

Participant Name
Smith

▼ Pre-Inspection Section

Fire Escape Plan?

Preinspection Complete

Room Location(s)

▼ Scheduling Information

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

Estimated Deadline

Assigned Contractor
Mark Evergreen Contractor

Case
00002250

Parent Assessment

Activity Summary

Certificate of Occupancy

Water Test Requested?

Number of Assessment Items
94

Number of noncompliant Items
3

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...

Resolve Non-Compliant Items (Request Variance or Initiate Home Modifications)

For information and process on “Accessibility Assessments”, please see separate document **Agency Portal User Manual: Accessibility Assessments - Accessibility Project**

There are two ways to resolve non-compliant items:

- **REQUEST VARIANCE** (Add notes for DAIL to review. If applicable, upload any supporting documents in the **RELATED** tab of the **Assessment**.
Important: Do not upload the supporting document in the variance request.
- **INITIATE HOME MODIFICATIONS** (Working with the homeowner to complete repairs/home modifications)

NOTE:

There may be a combination of resolutions, some items may need a **VARIANCE** approval AND some items may need **HOME MODIFICATIONS** by the homeowner.

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

Variance requests need to be reviewed and approved and/or all home modifications completed **BEFORE** creating a follow-up assessment and contacting the housing contractor for a follow-up Assessment.

Request A Variance

To review the Non-Compliant Items in an Assessment, from the **Assessment** click **NONCOMPLIANT ITEMS**. Go to **RESULT RESOLUTION** column.

The screenshot displays the 'NON-COMPLIANT ITEMS' interface. The table has the following columns: Assessment Item Information, Result Resolution, Observation Notes, Corrective Action Notes, Variance Notes, Feedback, and Actions. The items listed are:

| Assessment Item Information | Result Resolution | Observation Notes | Corrective Action Notes | Variance Notes | Feedback | Actions |
|--|-------------------|-------------------|-------------------------|---|----------|---------|
| AI-7209 Electricity: The Circuit Breaker Box is in good condition (no KO's missing, etc.) | Request Variar | | | | | |
| AI-7208 Electricity: Other findings | Request Variar | | | Variance required-client will not access this area of the house | | |
| AI-7195 Water Heaters: The water heater has a PRV and a discharge pipe form the valve to within 6" of the floor | Initiate Home | | | | | |

To request a variance on an item:

- Add **VARIANCE NOTES** that will assist DAIL when reviewing the request and upload any supporting documents in the **RELATED** tab of the **Initial Assessment**. Do not upload the supporting document in the variance request.
- (The Variance notes and document upload **MUST** be entered before this step.) Change entry in **RESULT RESOLUTION** column to **REQUEST VARIANCE** for the items in which a variance is being requested.
- Click **SAVE**

NOTE:

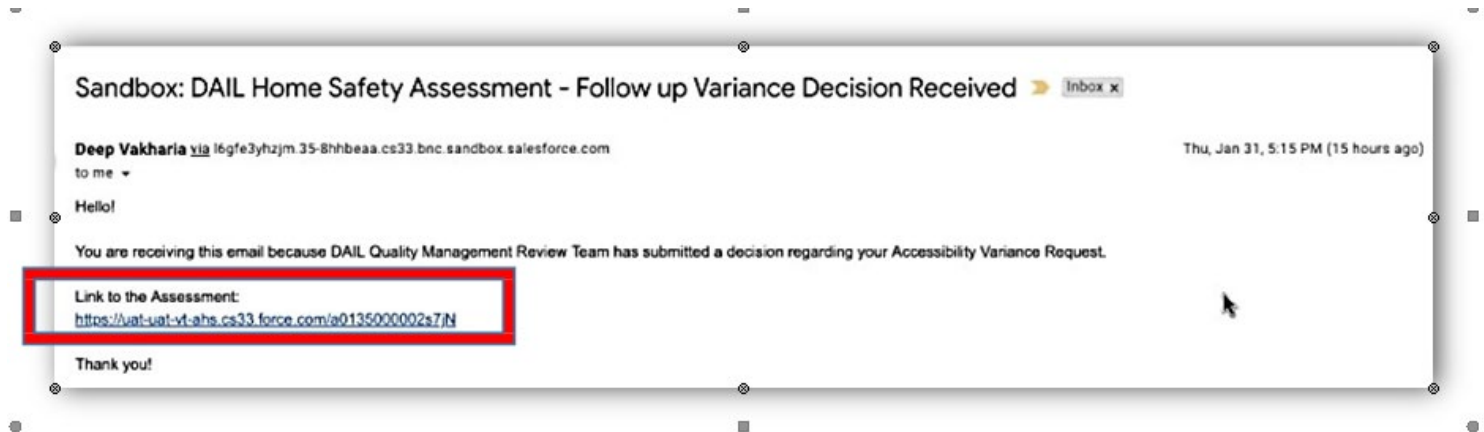
There is a limit of 255 characters for the **Variance Notes**. If a longer note is needed, create a separate document with the comments, write the note in the **Variance Notes** to "See attached note," and upload the document in the **Related** tab of the Initial Assessment.

Each item in which a variance is being requested needs to follow the steps above

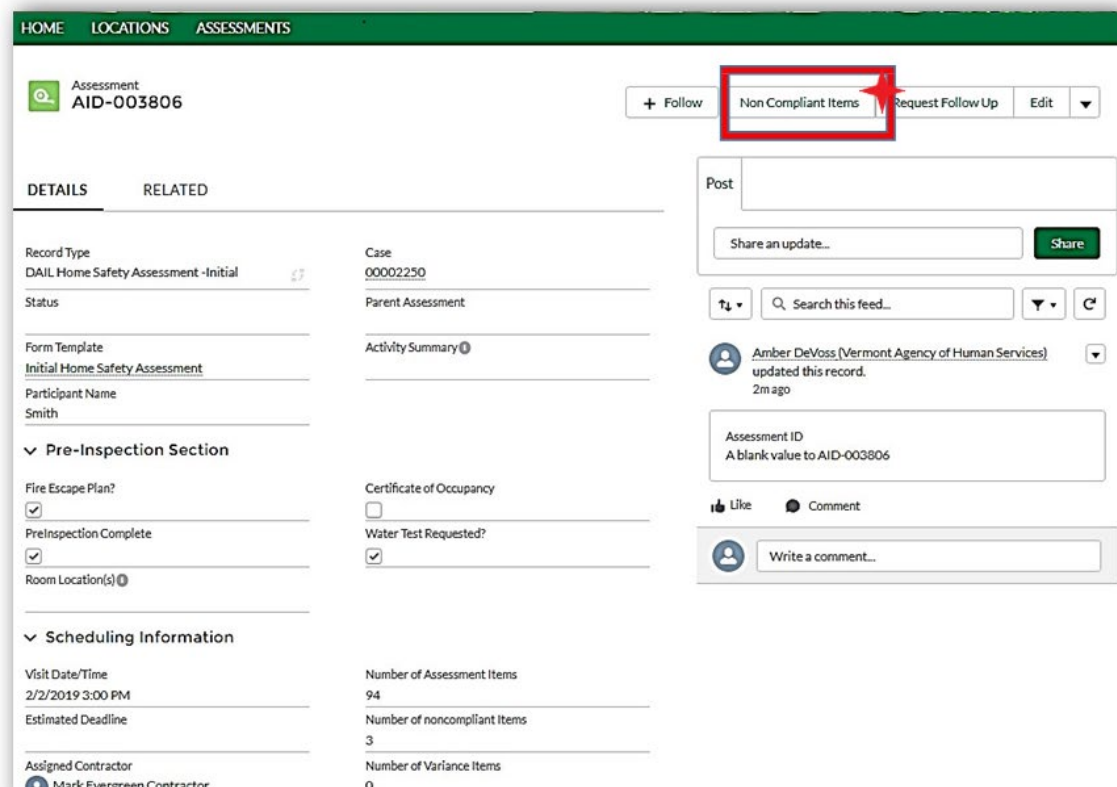
Review Variance Decision

Once the request for variance has been submitted by the Service Coordinator, an e-mail notification will be sent to the DAIL Quality Management Team who will review the variance request(s).

Once the DAIL Quality Management Team Reviewer has responded to the variance request, the Service Coordinator will receive an e-mail notification. It will look like this:



Click **Link to the Assessment** in the e-mail notification; or from the **Assessment**, Click **NONCOMPLIANT ITEMS**.



Click **ALL VARIANCE ITEMS** to view the decision by the DAIL Quality Management Team.

Click **CONVERSATION HISTORY** on upper right to view any comments or questions related to the variance request.

Variance decisions:

- If the variance is approved, no further action is necessary **for the item(s)** and the item(s) will show as **VARIANCE APPROVED**.
- If additional information is needed for a variance, the item(s) will still show as **NONCOMPLIANT ITEMS**. Follow the steps below for **Variance Denials/More Information** and provide the additional information that is being requested by the Quality Management Team.
- If the variance is denied, the agency will need to work with the home provider to correct the non-compliant item(s).

Note: There may be a combination of the above actions.

It is important to read the Variance Notes:

If the variance being requested is for additional time to make home modifications (for example, a window needing replacement), if the Quality Management Team Reviewer grants the time extension this will be indicated in the Variance Notes; however, the variance will not show Approved. The Variance will show as Denied and the item(s) will remain Non-Compliant. Once the home modification has been completed, the agency will need to request a follow-up Assessment.

Variance Approvals

- If the DAIL Quality Management Team approves all of the variance requests and there are **no other** Home Modifications needed, then a Follow up Assessment does **not** need to be created. The Quality Management Team will approve the Assessment, and the Service Coordinator will receive an e-mail notification that the Assessment has been Approved. The Service Coordinator can then **Approve the Case**.
- If the DAIL Quality Management Team approves all of the variance requests, but there **are other non-compliant items**, the Service Coordinator will need to work with the homeowner to ensure all other home repairs have been completed and then request for a **Follow-up Assessment** with the housing contractor.

Variance Denials/More Information Needed

If the DAIL Quality Management Team does not approve the variance request(s),

- Additional information may be needed for the variance; or
- The variance request has been denied.

Note: There may be a combination of the above actions.

If a variance is denied, the item(s) will still show as **NONCOMPLIANT ITEMS**. Click **CONVERSATION HISTORY** on upper right to view any comments or questions related to the variance request.

If additional information is necessary

Follow the steps to **Request a Variance** and include the additional information requested by the Quality Management Team in the comments and/or upload additional information into the **RELATED** tab of the **initial** assessment.

If the variance is denied

If the variance is denied, the Service Coordinator will need to work with the home provider on the home modifications for the non-compliant items.

Once the homeowner has completed **all** of the necessary home repair/modification, and the Service Coordinator has confirmed that they have been corrected, it is time to create a **Follow Up Assessment**.

IMPORTANT

Service Coordinators must confirm all required home modifications are completed prior to entering the information into the database and scheduling a Follow Up Assessment with the housing contractor.

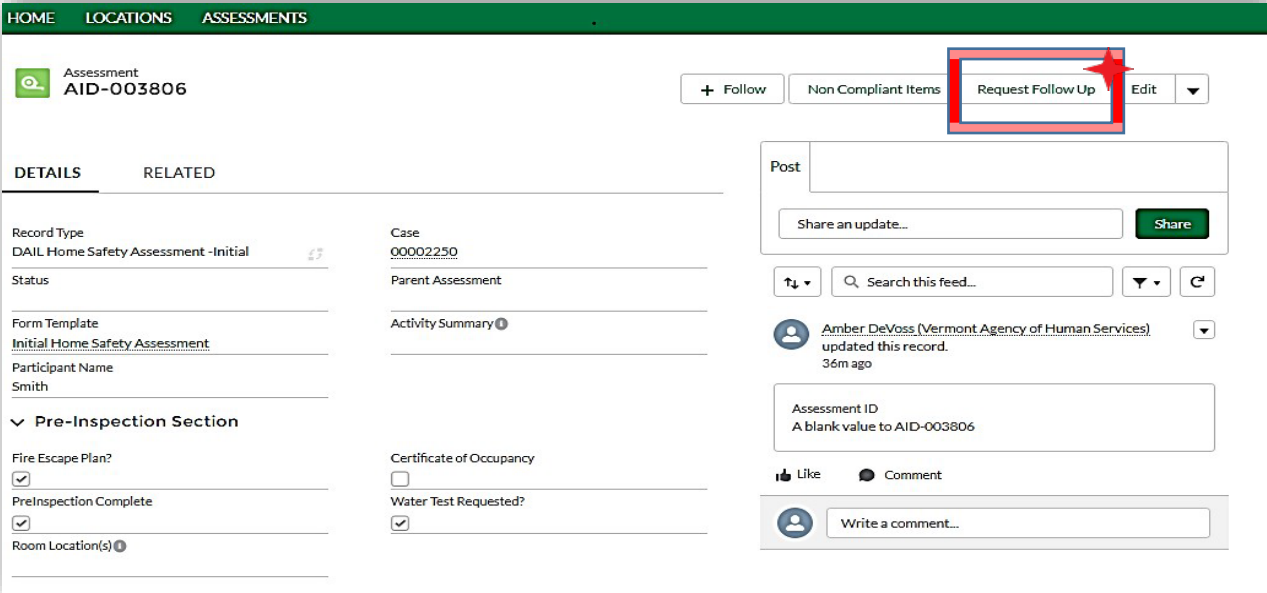
Scheduling a Follow Up Assessment

After any variances have been requested and approved, and the agency has verified the completion of home modifications for any remaining initial non-compliant items that need to be re-assessed, the Follow Up Assessment is created in the Housing Portal and the Housing Contractor is contacted.

IMPORTANT

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.



The screenshot displays the 'ASSESSMENTS' section of a web application. At the top, there are navigation tabs for 'HOME', 'LOCATIONS', and 'ASSESSMENTS'. Below this, the assessment details for 'AID-003806' are shown. A toolbar contains buttons for '+ Follow', 'Non Compliant Items', 'Request Follow Up', and 'Edit'. The 'Request Follow Up' button is highlighted with a red rectangular box and a red arrow pointing to it. Below the toolbar, there are sections for 'DETAILS' and 'RELATED' information, including record type, case number, status, and various inspection checkboxes. On the right side, there is a 'Post' section with a text input field, a 'Share' button, and a search bar. Below that, a user profile for 'Amber DeVoss (Vermont Agency of Human Services)' is shown, along with a comment area for the assessment.

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.

VERMONT

Search... SEARCH

RICK SERVI...

HOME LOCATIONS ASSESSMENTS

Assessment
AID-003807

+ Follow Non Compliant Items Request Follow Up Edit

DETAILS RELATED

Record Type
DAIL Home Safety Assessment - Follow up

Status
To be scheduled

Form Template
[Initial Home Safety Assessment](#)

Participant Name
Smith

▼ Pre-Inspection Section

Fire Escape Plan?

Preinspection Complete

Room Location(s)

Case
[00002250](#)

Parent Assessment
[AID-003806](#)

Activity Summary

Certificate of Occupancy

Water Test Requested?

Post

Share an update... Share

Search this feed...

Rick Service Coordinator (Customer) updated this record. 2m ago

Assessment ID
A blank value to AID-003807

Like Comment

Write a comment...

Follow the same steps that are used for an initial Assessment.

Enter **VISIT DATE** and **VISIT TIME**. Click **SAVE**

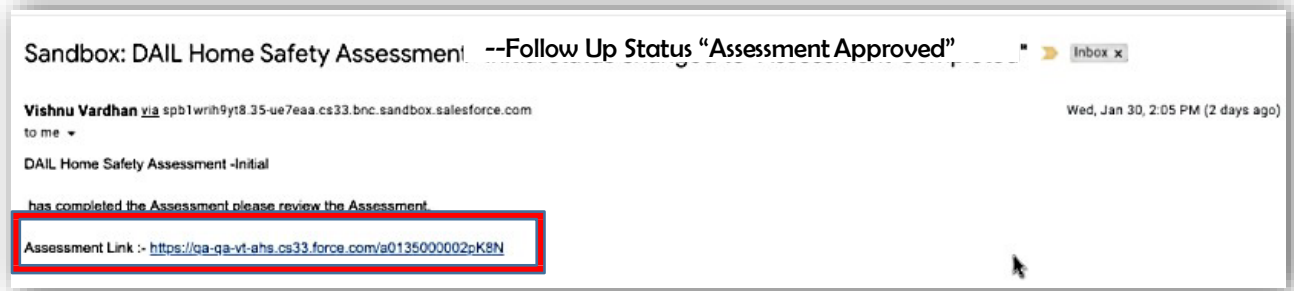
Complete the fields according to the steps below and click on the **SAVE** button on the bottom right. Make sure the **FORM TEMPLATE** field says Initial Home Safety Assessment. The fields with red ✦ must be entered for users to save the record.

The screenshot shows the 'Edit AID-003807' form with the following sections and fields:

- Record Type:** DA/L Home Safety Assessment - Follow up
- Case:** 00002250
- * Status:** To be scheduled
- * Form Template:** Initial Home Safety Assessment
- Parent Assessment:** AID-003806
- Activity Summary:** (Rich text editor)
- Participant Name:** Smith
- Pre-Inspection Section:**
 - Fire Escape Plan?
 - Preinspection Complete
 - Certificate of Occupancy
 - Water Test Requested?
- Room Location(s):** (Rich text editor)
- Scheduling Information:**
 - Visit Date/Time: Date and Time fields
 - Number of Assessment Items: 3
 - Estimated Deadline: (Date field)
 - Number of Noncompliance Items: 3
 - Assigned Contractor: **✦ Make sure to enter Service Coordinator Name**
 - Number of Variance Items: 0
 - Assigned Service Coordinator: Search People...
- Assessment Address:**
 - Physical Address: **✦ Enter DATE**
 - Exam Structure: **✦ Enter TIME**

At the bottom right, there are three buttons: 'Cancel', 'Save & New', and a green 'Save' button highlighted with a red box.

Once the Contracted Inspector has completed the Follow-Up Assessment and all items are “compliant” you will receive Notification of Approved Assessment

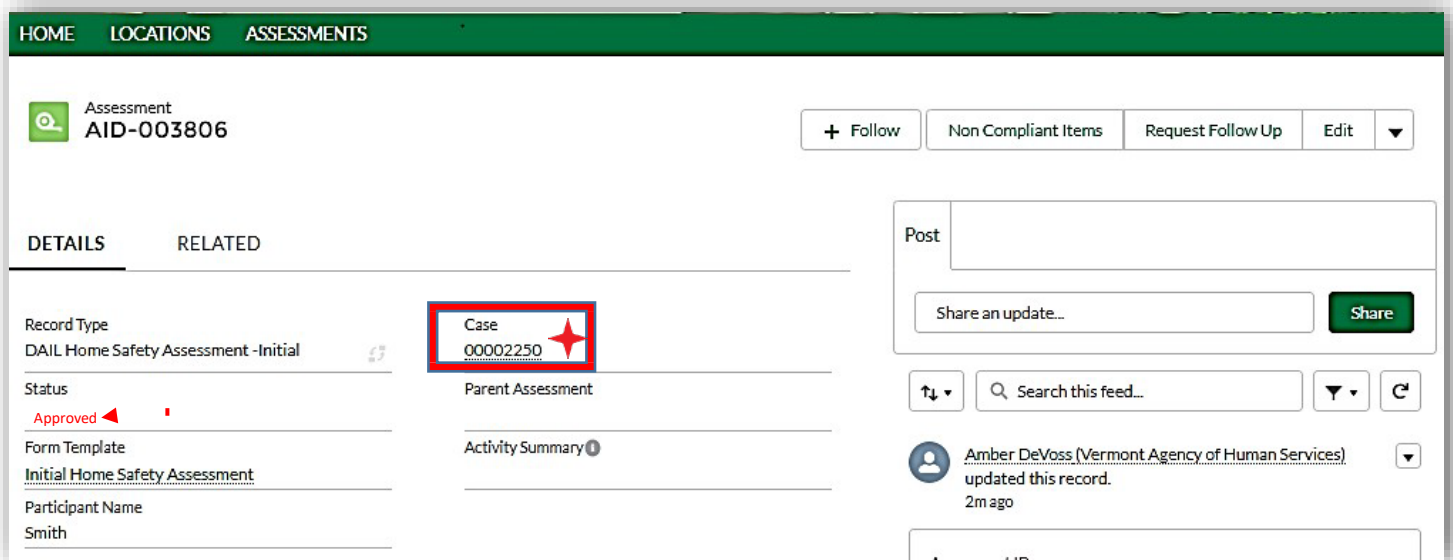


Approving a Case

IMPORTANT

A Case cannot be approved until ALL Assessments are Approved.

From the **Approved Assessment**, click **CASE** number.



From the **Case** click **EDIT**.

The screenshot shows a web application interface for case management. At the top, there is a navigation bar with 'HOME', 'LOCATIONS', and 'ASSESSMENTS'. Below this, a 'Case' header is visible. A table displays case details: Priority (Medium), Status (Open), and Case Number (00002250). The main content area is divided into 'DETAILS' and 'RELATED' sections. Under 'DETAILS', there are three expandable sections: 'Location & Participant Information' (showing Participant Name: Jasmine Smith and Location: LN-000000), 'Emergency Placement' (with fields for Emergency Placement? and Emergency Placement Comment), and 'Additional Information' (showing Status: Open and Case Owner: Amber DeVoss). On the right side, there are action buttons: '+ Follow', 'Edit' (highlighted with a red box), 'Submit for Approval', and 'Print Record'. Below these buttons is a 'Post' section with a text input field and a 'Share' button. A search bar for the feed is also present. At the bottom right, there is a summary card for case 00002250 with a 'View more details' link.

Update case **STATUS** from **OPEN** to **APPROVED**. Click **SAVE**.

Edit 00002250

Location & Participant Information

* Participant Name

Jasmine Smith

Location

LN-000000

Emergency Placement

Emergency Placement?

--None--

Emergency Placement Comment

Rich text editor with icons for Bold, Italic, Underline, Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, Paragraph, and Text Color.

Additional Information

Case Status
Approved

Case Owner
Amber DeVoss

Case Origin
Web

Case Number
00002250

* Program
Home and Community Based Services

Parent Case
Search Cases...

Description

Subject

Internal Comments

Web Email

System Information

Created By
Amber DeVoss, 2/2/2019 4:53 PM

Date/Time Opened
2/2/2019 4:53 PM

Contact Name

Date/Time Closed

Priority
Medium

Cancel Save

Re-Inspection (5 year or when required)

The Home Safety Assessment will be conducted every five (5) years for homes originally inspected on or after July 1, 2011. A re-inspection is also required when there are significant alterations to the home that may impact the safety of the individual living in the home, or if the DAIL Quality Management reviewer or Service Coordinator from the Provider Agency feels there are safety concerns in the home following a DAIL Quality Services Review and/or home visit. (See the Housing Safety and Accessibility Inspection Process Protocol.)

A new Accessibility Assessment will need to be completed on the home every 5 years, with the Home Safety Assessment reinspection, as long as an individual with mobility or accessibility needs is living in the home. A new Accessibility Assessment may also be requested by the DAIL Quality Management Reviewer or Service Coordinator before the 5 years, if they feel there are safety concerns in the home.

5-Year Re-Inspection

The agency staff should review the report that shows the assessment expiration date on the shared living homes expire. This report will show when the 5-year re-inspection is due on a home.

IMPORTANT

A 5-year inspection cannot be done before the 5-years has ended.

There is a 90-day grace period after the 5-years has ended in which an agency is required to schedule the 5-year inspection and for the home to meet all requirements.

When a home is due for the 5-year inspection, **the agency must CLOSE all of the current CASE(S) for the participant(s) in that location** before they can request a new assessment.

- Go into the **Case** for that Location.
- Add **5 Year** in the **DESCRIPTION**.
- Change the **STATUS** to **CLOSED**, and then **SAVE**.
- Do these steps for each **CASE** for the location.
- Then create a new **CASE** for each participant at the location (See **Creating a Case**)
- In the **CASE**, request a new Assessment (See **Initial Home Assessment**). If there are multiple participants at the same home, only one home assessment is necessary. Choose one of the CASES to use to request the initial home assessment.

IMPORTANT

It is important to include the note in the **CASE** when it is closed (See **Closing a Case**)

Other Re-Inspections

If a home has had significant alterations or the DAIL Quality Manager Reviewer or Service Coordinator from the Provider Agency feel there are safety concerns in the home following a DAIL Quality Services Review and/or home visit:

- Contact DAIL for assistance in scheduling the Re-Inspection. DAIL staff will need to make some edits in the database before a new Assessment can be requested by the agency.

Result of **Print Record** at the **Case** Level *(See separate document, Print Assessment, Case, and Reports Documents, dated March 2023)*

Placing Multiple Individuals at One Location/Moving Participant into an Existing Location

This step is used when an agency wants to place additional individual(s) in a Location that is already being used by that agency.

When placing an individual in a Location used by another agency, follow the steps for the section on **Shared Location**.

Create a Case for Additional Participants at One Location.

Go to the Location. From **Location**, click **RELATED** then click the **NEW** button within the Case area

Location
LN-000000

DETAILS **RELATED**

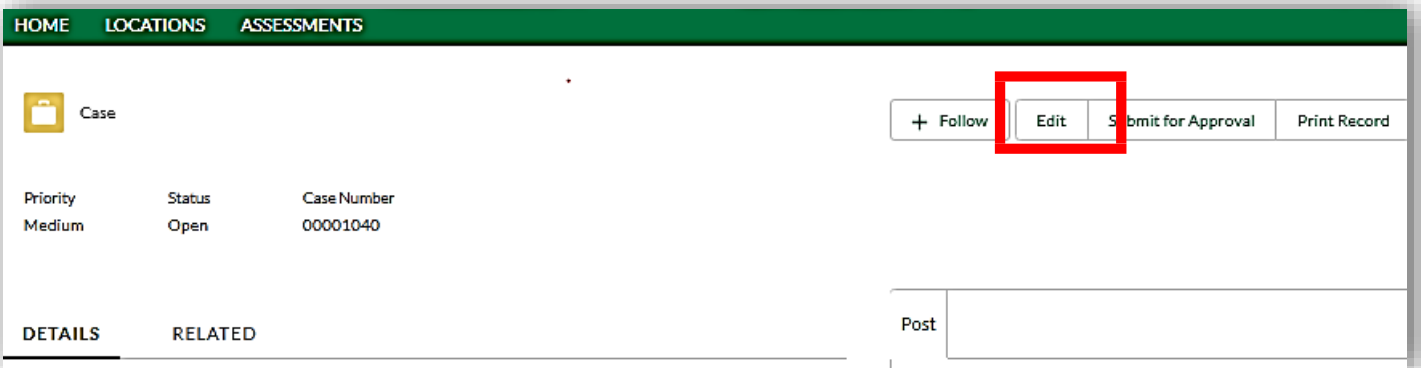
| | |
|---|---|
| Location Number LN-000000 | Home Provider Name <u>Jane Home Provider</u> |
| Is Location Leased/Rented <input type="checkbox"/> | Property Type |
| Provider Agency <u>Howard Center (HC)</u> | |
| Assessment Approved Date | |

Create the **Case** by following the instructions under **Creating a Case**.

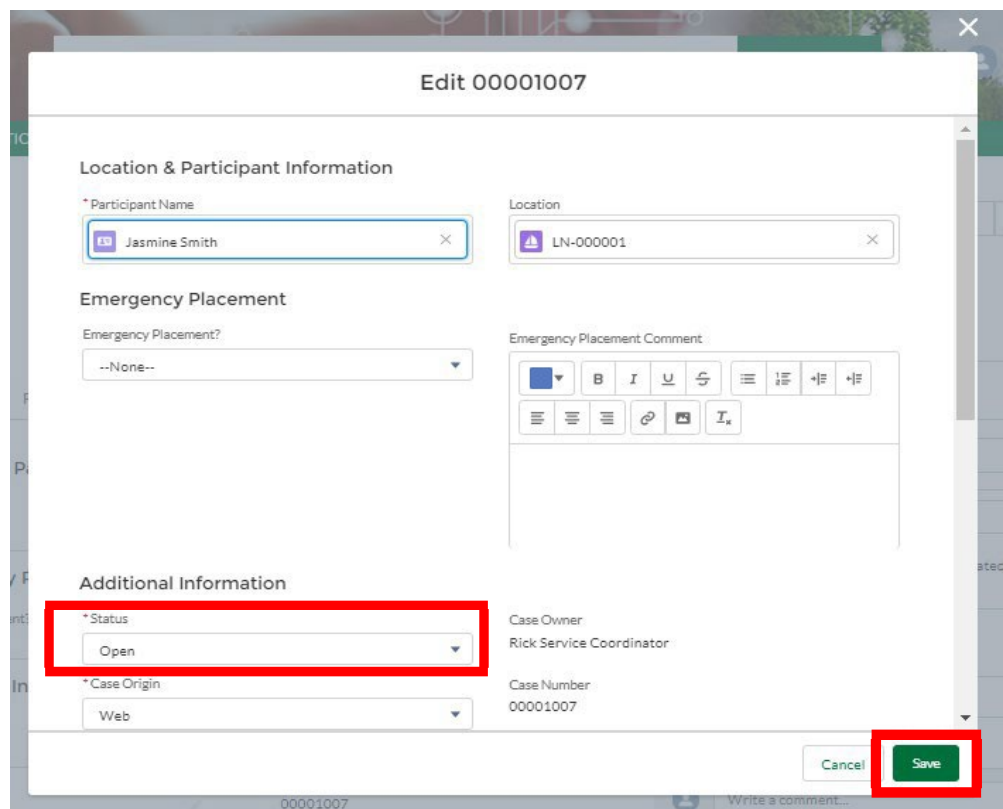
- If there is already a current, Approved Home Safety Assessment for the Location, and an Accessibility Assessment is **NOT** required for this participant, the **Case** needs to be Approved. (See **Approving a Case**)
- If there is already a current, Approved Home Safety Assessment for the Location, and an Accessibility Assessment **IS** required for this participant, an Accessibility Assessment will need to be scheduled. See section on **Check for Accessibility Assessment**. The Case cannot be Approved until the Accessibility Assessment is completed.
- If the Home Safety Assessment for the Location is not Approved, or if the assessment has expired; a new Home Safety Assessment is needed for the location. (See **Creating A New Assessment (Safety/Accessibility)**)

Home Safety Assessment Approved and an Accessibility Assessment is NOT required

Step 1: Go to the Case for this participant and Click **EDIT** on the Case.



Step 2: Change **STATUS** from **Open** to **Approved** and click **SAVE**.



Home Safety Assessment Approved and an Accessibility Assessment IS required

If there is already a current Safety Assessment for the Location, and an Accessibility Assessment IS required, create a case as explained above; however, leave the case **OPEN**.

Create a new Accessibility Assessment in the case as explained in the section **Check for Accessibility Assessment**.

Shared Location: Requesting Access of a Location Used by Another Agency *(See separate document, Shared Location, dated April 2023)*

Certificate of Occupancy or Residency *(See separate document on Certificate of Occupancy or Residency dated September 2023)*

Printing a Case, Assessment, or Record *(See separate document, Printing Assessment, Case and Reports dated March 2023)*

Print Case Function *(See separate document, Printing Assessment, Case and Reports dated March 2023)*

Print Assessment Items *(See separate document, Printing Assessment, Case and Reports dated March 2023)*

Print Case Record *(See separate document, Printing Assessment, Case and Reports dated March 2023)*

Closing a Case *(See separate document, Closing a Case, dated January 2023)*

*For information and process on “Closing a Case”, see separate document Agency User Manual, **Closing a Case**, dated January 2023*

Emergency Placement

DAIL Housing and Safety Inspection Protocol (in part)

Emergency home placement of an individual may be made on a case-by-case basis. Crisis or emergency placements are defined as the **unexpected and imminent** homelessness of an individual that would put their health and safety in jeopardy due to no fault of their own. Approval of such emergency placements, without prior inspection of the home, may be granted only by the appropriate DAIL Quality Management staff, after a review of the individual circumstances and documentation of all efforts to complete the required inspections and place the individual in the home within standard timelines.

In the case of a crisis or emergency placement, the Provider Agency shall conduct a preliminary safety assessment, using the DAIL Pre-Inspection Housing Standards and Checklist, before the individual moves into the home.

NOTE:

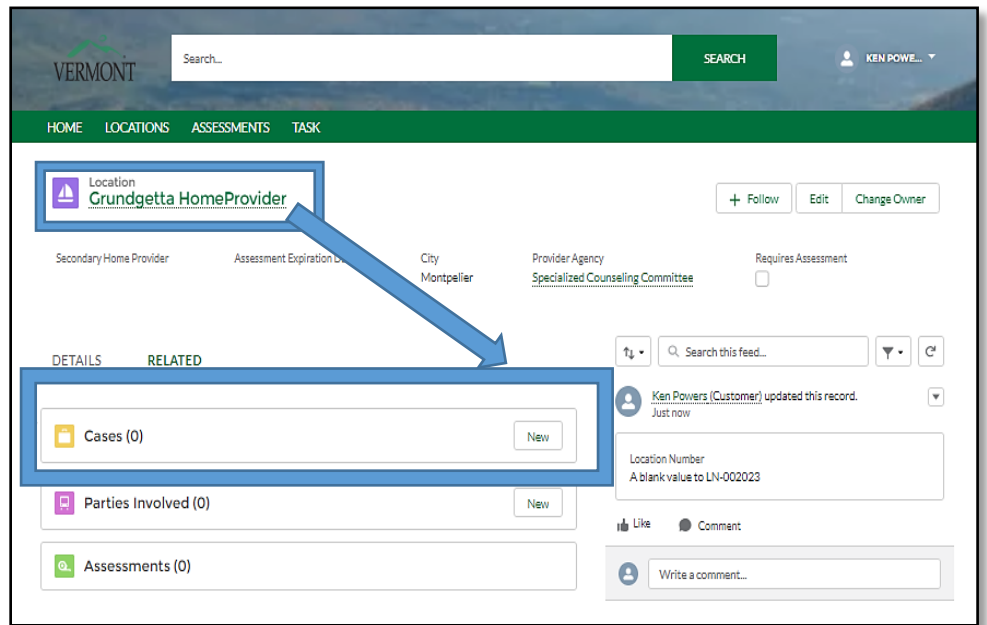
If the location is in the Housing Portal and it has an Approved Home Safety Assessment in which the expiration date is still valid, an Emergency Placement is not required unless an Accessibility Assessment is required for the participant.

In the case of a crisis or emergency placement:

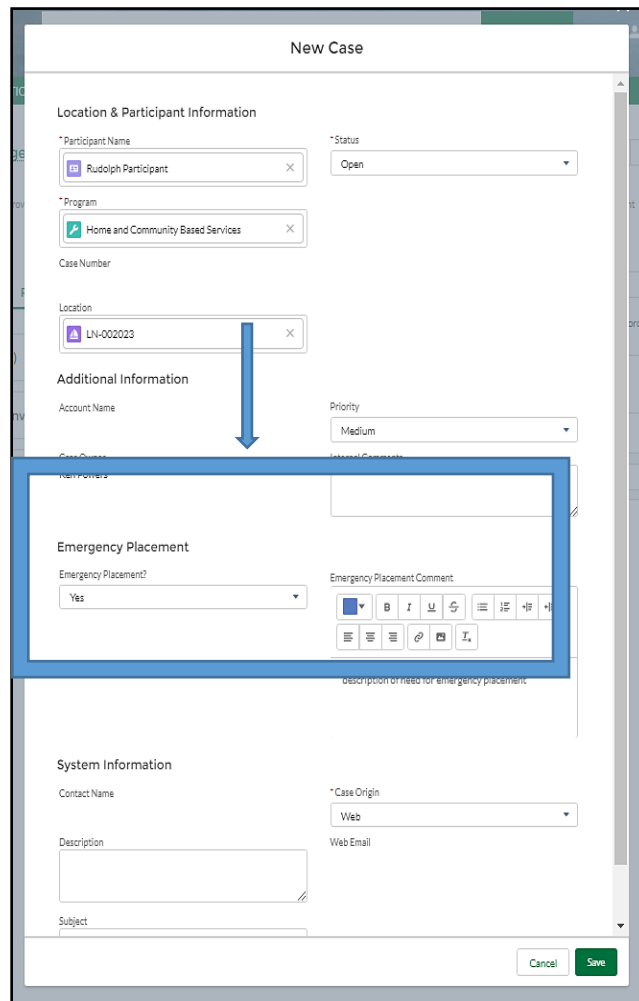
- The agency will do a pre-inspection of the home and fill out **the DAIL Pre-Inspection Housing Standards and Checklist**.
- The Service Coordinator will follow the steps for **Location** and **Creating a Case**.
- In the **Case**, enter Emergency Placement **COMMENTS** for the Quality Management Team;
- Under **EMERGENCY PLACEMENT** select **YES**, and Click **SAVE**. (Note: Once the record has been Saved, the Emergency Placement Comments cannot be edited and the Case is locked; however, documents can still be uploaded in the **Related** tab of the **Case**.)
- The **DAIL Pre-Inspection Housing Standards and Checklist**, and the Fire Safety Plan for the home **NEED** to be upload it into the **Related** tab of the **CASE**. (Important: This is a different tab than is used for any other attachments. A copy of these forms will also need to be uploaded into the **Related** tab of the Assessment, once that has been created.)
- Once the Quality Management Team has made a decision on the Emergency Placement request, the Service Coordinator will receive an email notifying them of the decision that has been made.
 - If the **Emergency Placement** is Approved, the Service Coordinator can create an **Assessment** and proceed as usual to complete pre-inspection items and contact the housing contractor to schedule a visit date/time. (See **Creating an Assessment**)
 - If the Emergency Placement is Denied, other arrangements for the participant need to be made.

Step #1: Search for the Location and create the location if it is not already in the system. (See **Location**)

Step #2: Create a new **Case** (See **Creating a Case**)



Step #3: Add **COMMENTS** for DAIL Select **YES** for **EMERGENCY PLACEMENT**. **SAVE**. Go back in the Case and upload the required documents.



The Case is now locked (cannot Edit) until DAIL submits a decision for the Emergency Placement.

The screenshot shows a web application interface with a green header containing 'HOME', 'LOCATIONS', and 'ASSESSMENTS'. Below the header, there is a location icon and the text 'Location LN-000000'. The interface is divided into 'DETAILS' and 'RELATED' tabs, with 'RELATED' selected. Under the 'RELATED' tab, there is a 'Cases' section with a 'New' button and a table. The table has columns for 'CASE NUMBER', 'PARTICIPANT NAME', 'STATUS', and 'DATE/TIME OPENED'. Below the 'Cases' section, there is a 'Contacts (1)' section, which is highlighted with a red box. This section contains a table with columns for 'NAME', 'ACCOUNT NAME', and 'PHONE'. The 'NAME' column contains 'Donald Duck', and the 'ACCOUNT NAME' column contains 'Citizen'. A red arrow points to the 'NAME' column header, and a red vertical line is drawn between the 'NAME' and 'ACCOUNT NAME' columns.

| CASE NUMBER | PARTICIPANT NAME | STATUS | DATE/TIME OPENED |
|--------------------------|----------------------|-----------------------|-------------------|
| 00001006 | Lee Test Participant | Emergency Placemen... | 1/21/2019 2:25 PM |
| 00001008 | Jasmine Smith | Open | 1/22/2019 1:12 PM |
| 00001016 | Lee Test Participant | Open | 1/24/2019 9:35 AM |
| 00001648 | Donald Duck | Approved | 1/30/2019 2:11 PM |
| 00002248 | Lee Test Participant | Open | 2/2/2019 10:08 AM |
| 00002250 | Jasmine Smith | Open | 2/2/2019 4:53 PM |

| NAME | ACCOUNT NAME | PHONE |
|-----------------------------|--------------|-------|
| Donald Duck | Citizen | |

- **If the Placement is approved**, the Service Coordinator needs to create an home safety **Assessment** and proceed as usual to complete the pre-inspection items, upload the fire plan, and contact the Housing Contractor to schedule a visit date/time.
- **If the Placement is not approved**, the agency will need to make other arrangements for the participant.

Reports *(See separate document, Print Assessment, Case, and Reports Documents, dated March 2023)*