

# DAIL HOUSING PORTAL TRAINING

## Home Safety Inspections for Shared Living Homes

Updated May 2023



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# AGENDA

Introduction

Assessment Overview

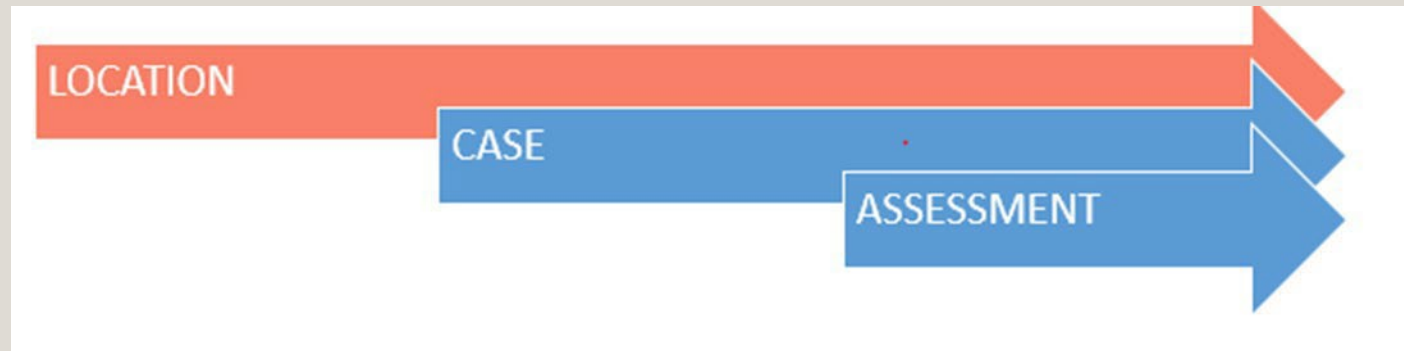
Housing Portal

# OVERALL PROCESS FLOW

- **LOCATIONS** are the master record which contain Location specific information.
  - Within each unique Location record, the **CASE** is created which contains Participant-specific information.
    - Within the participant Case, a new **ASSESSMENT** is created which contains the inspection items.

# LOCATIONS, CASES AND ASSESSMENTS

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**Remember the overall process:**

First create a Location, then add a Case to the Location, lastly add an Assessment to the Case.

# IF THE LOCATION AND CASE EXISTS, CHECK THE ASSESSMENT EXPIRATION DATE

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**If there is a date that hasn't expired, you don't need a Home Safety Assessment because the Location already has a current Home Safety Assessment.**

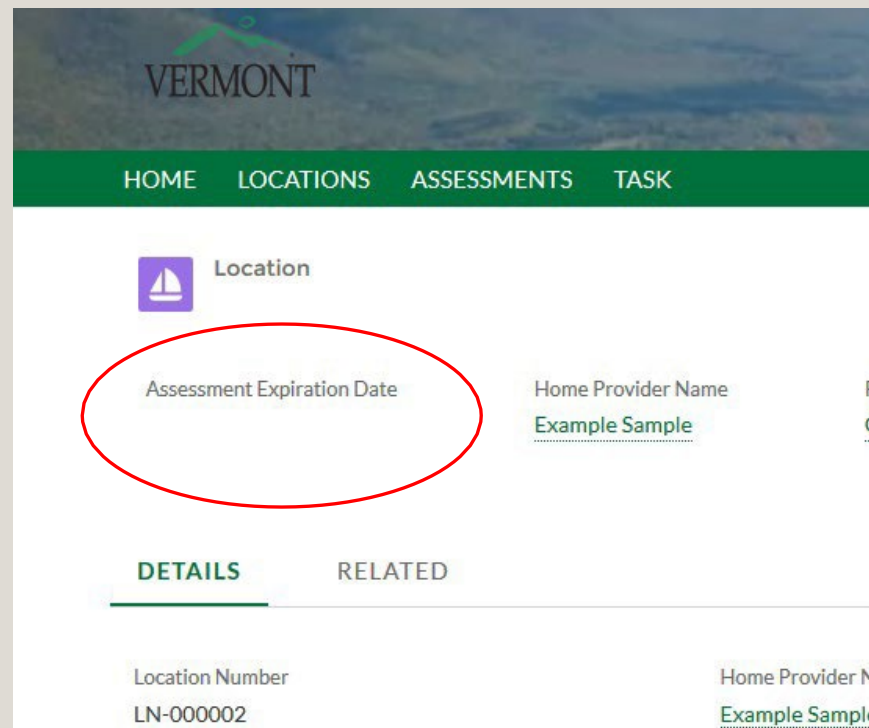
*There may be circumstances in which a Location needs to have a new Assessment entered prior to the expiration date. In these situations, please contact DAIL.*



**If there is no date, or the expiration date has expired, then you need to create and start the Assessment process.**


# SAFETY INSPECTION EXPIRATION DATE

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VERMONT

HOME LOCATIONS ASSESSMENTS TASK

 Location

Assessment Expiration Date

Home Provider Name  
Example Sample

**DETAILS** RELATED

Location Number  
LN-000002

Home Provider Name  
Example Sample

## EXCEPTION CLAUSE

Home safety inspections completed prior to July 1, 2011 are not required to have a five (5) year reinspection, unless:

- A new individual moves into the home;
- The documentation of the inspection cannot be located or does not show compliance;
- The home has significant alterations completed;
- An Accessibility Assessment is necessary; or
- DAIL Quality Management staff or the Provider Agency feels there are safety concerns in the home.



# Current Home Safety Assessment Needed

**BEFORE** entering any information into the Housing Portal or contacting the Housing Contractor, the agency will:

- Perform a pre-inspection home assessment using the Pre-Inspection Housing Standards and Checklist form. This form will need to be filled out by the agency and uploaded into the Housing Portal in the Related tab of the Initial Home Safety Assessment.
  - ALL potential bedrooms in the home should be inspected for the Home Safety Assessment.
  - Discuss any non-compliant items with the homeowner and assist them in correcting any issues.
- Ensure that all required testing has been completed (ex: water test, chimney inspection); and all documentation for the home are available for the Contractor on the day of the Assessment.
- After completing these items, the agency will create a Home Safety Assessment in the Housing Portal, upload all required documents, and contact the Housing Contractor using the required Assessment Request form to schedule the Assessment.

*Manual instructions and forms can be found at:*

<https://ddsd.vermont.gov/services-providers/services/housing-safety-and-accessibility-process/forms>



# WATER TEST

Any home that is not on a public water system is required to have a water test completed. It is up to the homeowner to request this test.

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If a **water test** is required:

- The test has been requested and the results have been received and uploaded into the DAIL Housing Portal before scheduling the Home Safety Assessment with the Housing Contractor; **OR**
- The test has been requested and the results will be received and uploaded into the DAIL Housing Portal by the time the Home Safety Assessment takes place.

## **IMPORTANT:**

The shared living provider will need to have a copy of the water test results to show the Housing Contractor at the scheduled Assessment.

The water test results are required to be uploaded into the Housing Portal by the agency, in the Related tab of the Initial Home Safety Assessment before the Assessment can be approved.



# CHIMNEY CLEANING AND INSPECTION VERIFICATION

A Shared Living Provider must have masonry chimneys, woodburning furnaces, stand-alone pipes, or fireplaces being used for wood in the home, should be cleaned and inspected:

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- Professional chimney cleaning and inspection needs to be completed prior to when the home safety assessment is conducted. The certificate or report on company letterhead is required to be uploaded into the Portal.
- Annually, chimneys should be cleaned and inspected. Annual cleanings not within 12 months of the home's scheduled safety inspection or reinspection can be done by a non-professional. Fill out the *Chimney Cleaning and Inspection by Non-Professional* form found on the Housing Safety and Accessibility Process page and keep it in agency records. This documentation will be requested during DAIL Quality Services Reviews.

**IMPORTANT:** The shared living provider will need to have a copy of the certificate or report to show the housing contractor at the Home Safety Inspection.



# Home Safety Assessment Process

After performing the Pre-Inspection Home Safety Assessment, working with the home provider, and ensuring any necessary assessment items are corrected, and any required testing and forms have been obtained:

1. Enter the necessary information and documentation into the Housing Portal per the Service Coordinator Manual (Location, Case, Assessment)
2. Fill out the Home Safety Request for Housing Contractor form and e-mail it to the Housing Contractor to request a date for the inspection to be completed.
  - Before sending the form, it must be renamed using the same type of naming convention as the forms for the Housing Portal, “**AR\_(Street Address)\_(Town)\_(Agency Acronym)**”
3. Once the date of the inspection has been scheduled, **the agency** must go back into the Housing Portal and enter the Assessment Date.

All forms, and resource information for shared living providers can be found on the housing website at: <https://ddsd.vermont.gov/services-providers/services/housing-safety-and-accessibility-process>

# LOCATION

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- If the Location has living area for the participant that appears to be 'separate' from the main home, please consult with DAIL **prior to** entering the information into the Housing Portal and prior to contacting the Housing Contractor to determine how this Location should be entered into the Housing Portal, and how it should be assessed by the Housing Contractor.
- When searching for a location enter only the street number and name. Please do not enter the street suffix (Road, Rd, street) as different permutations may exist. Enter the location in the search field and click search.

Notes about searching for an address Less info is better!	
123 School	Correct!
123 School Street, Barre VT	incorrect

# LOCATION

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## Important:

When entering a Location in the Housing Portal, always search for a location before adding it.



**NEVER** change the information of a Location that is already in the Housing Portal. If you believe an address has been entered incorrectly, please contact DAIL.



If a participant and/or home provider moves to a new Location, do **NOT** change the information of the existing Location in the Housing Portal.



If you can access a Location but are unable to see the Assessment information, please contact DAIL for assistance.

# Address Naming Standard

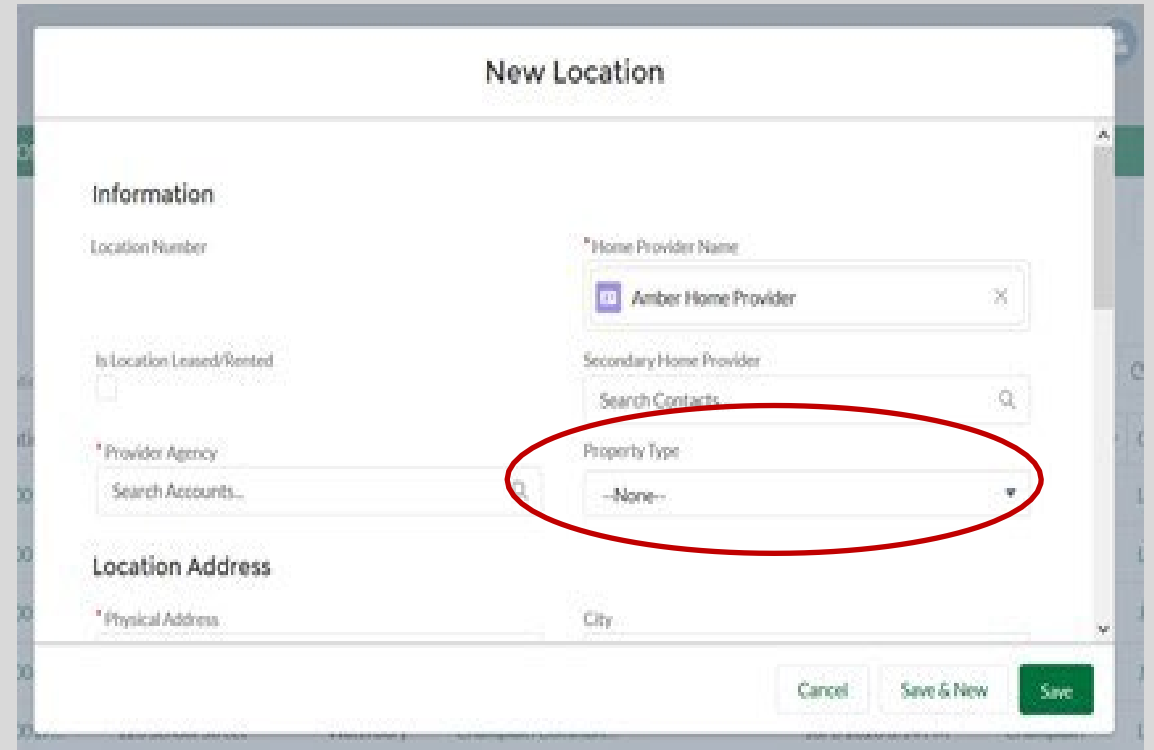
*Reminder:  
Naming  
Standard  
are required.*

	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



# Creating a new Location

**Property Type**  
must be filled in.



The screenshot shows a web form titled "New Location". It contains several sections: "Information" with fields for "Location Number", "Is Location Leased/Rented" (checkbox), "Home Provider Name" (dropdown menu showing "Amber Home Provider"), "Secondary Home Provider" (dropdown menu with "Search Contacts..."), "Provider Agency" (dropdown menu with "Search Accounts..."), and "Property Type" (dropdown menu showing "--None--"). The "Property Type" field is circled in red. Below this is the "Location Address" section with fields for "Physical Address" and "City". At the bottom right are "Cancel", "Save & New", and "Save" buttons.

Condo or Apartment

Duplex

Single Family

\*Single Family with Apartment(s)

\*Special Supportive Unit (SLP not living in unit)

Multi Use Building

\* = Contact DAIL before entering information



# PROPERTY TYPE DEFINITIONS

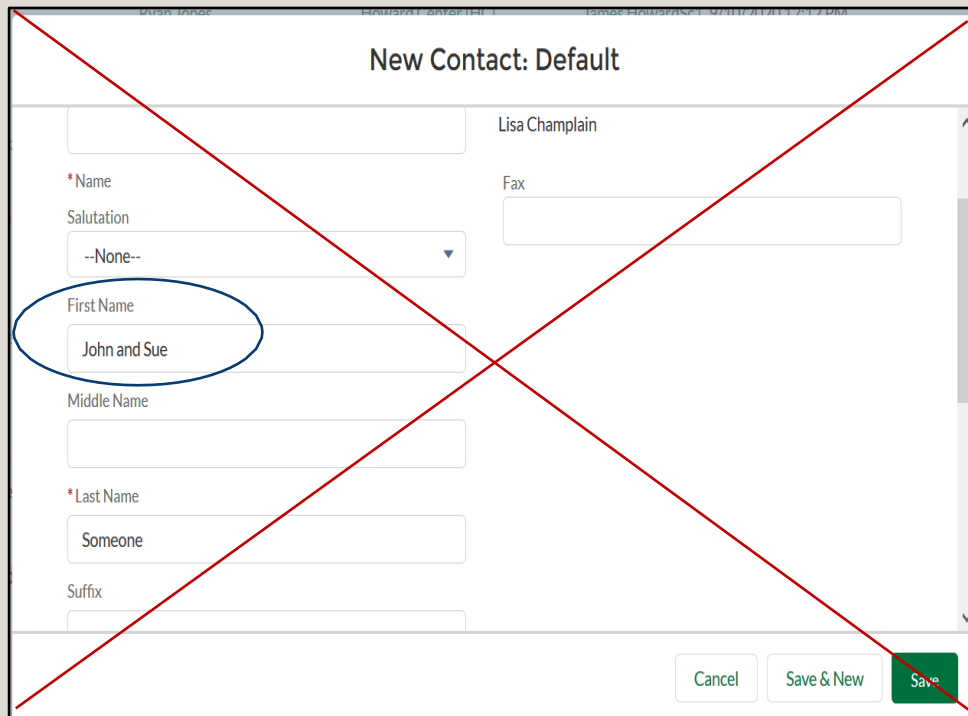
- **Condo or Apartment:** A condo or apartment building
- **Duplex:** A home with two Apartments, two entrances
- **Single Family:** A privately owned home (either by SLP or homeowner)
- \* **Single Family with Apartment(s):** A privately owned home with a separate unit (Approved by DAIL)
- \* **Special Supportive Unit (SLP not living in unit):**  
Units where participants have a full apartment and the SLP does not live in the unit.
- **Multi-Use Building:** Building that includes a business in the same building as apartments.

\* = Contact DAIL before entering information into Portal or scheduling the Assessment

# ADDING A HOME PROVIDER

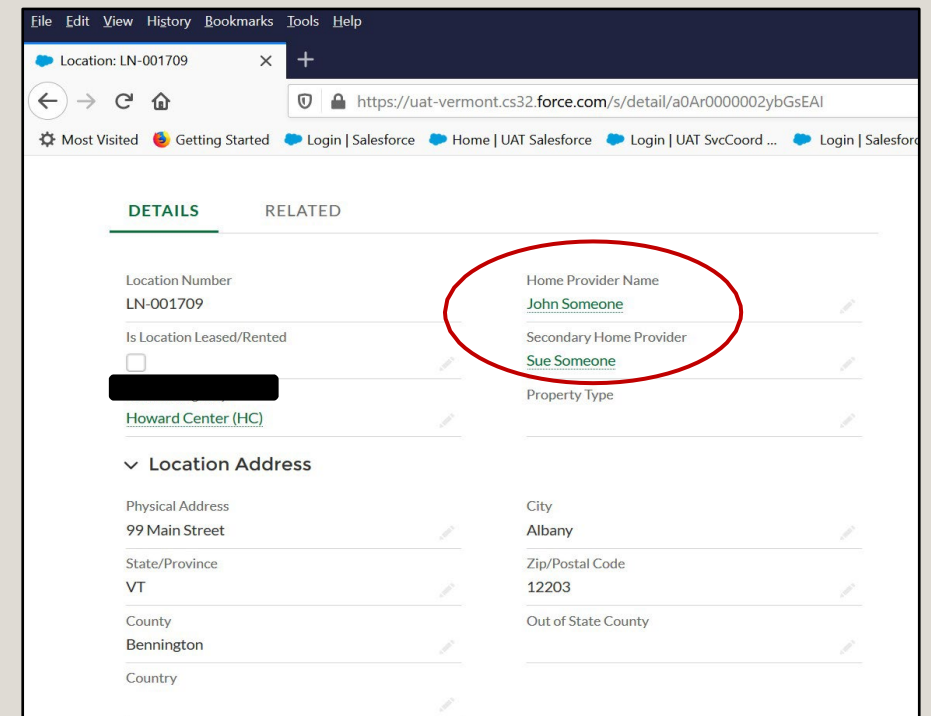
When adding a Contact, there should only be one person per Contact entry. If there are two home providers, there should be two separate contact entries.

**Incorrect:**



The screenshot shows a 'New Contact: Default' form. A large red 'X' is drawn across the entire form, indicating it is incorrect. The 'First Name' field is circled in blue and contains the text 'John and Sue'. Other fields include 'Last Name' (Someone), 'Salutation' (--None--), and 'Middle Name'.

**Correct:**



The screenshot shows a Salesforce record page for Location LN-001709. The 'Home Provider Name' field is circled in red and contains 'John Someone'. The 'Secondary Home Provider' field is also circled in red and contains 'Sue Someone'. The 'Physical Address' field contains '99 Main Street'.

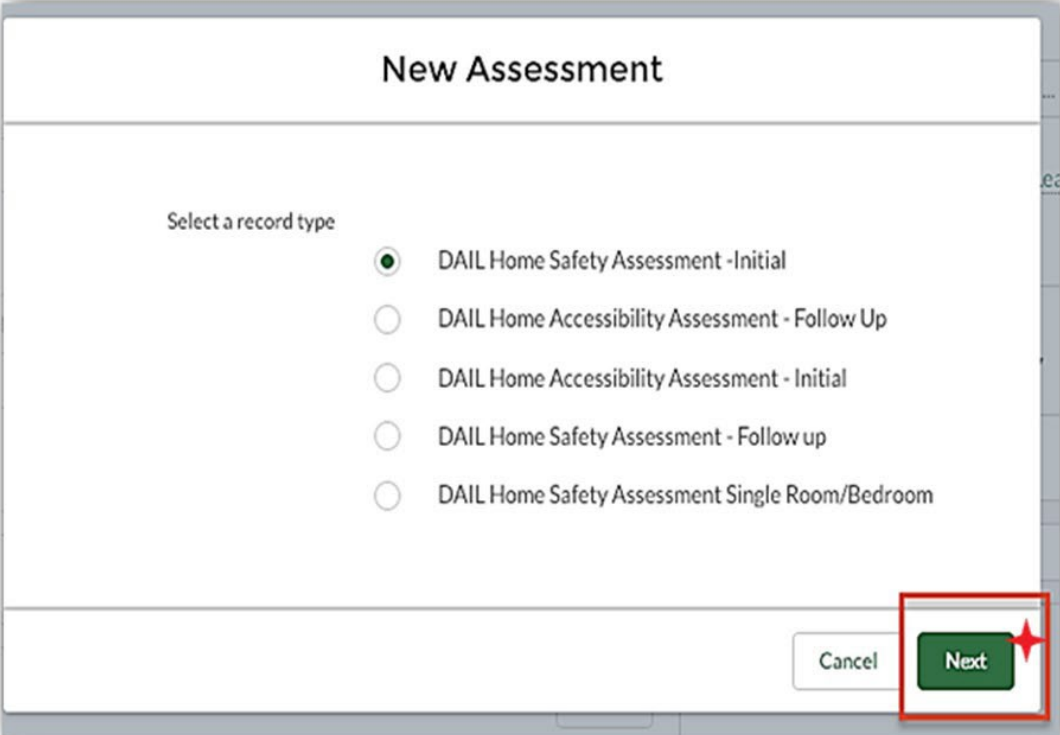
# NEW ASSESSMENT SCREEN

**IMPORTANT:** Only “Initial”

Assessments are created from here.  
Follow Up Assessments are created  
within the Initial Assessment Record.

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If you believe a Single  
Room/Bedroom (aka: bedroom only)  
assessment is needed, contact DAIL  
**before** entering any information into  
Housing Portal or contacting the  
Housing Contractor.



The screenshot shows a web application window titled "New Assessment". Inside the window, there is a section labeled "Select a record type" followed by a list of 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 window, there are two buttons: a "Cancel" button and a green "Next" button. The "Next" button is highlighted with a red rectangular box and a red star icon.

Read the template name *carefully*- It is important the correct template is selected.

Cancel Save & New Save

After saving the Assessment you will return to the assessment screen.

Next click the Related tab.

VERMONT

HOME LOCATIONS ASSESSMENTS TASK

Assessment  
79 Poor Farm Road

+ Follow Non Compliant Items Request Follow Up Edit

City: Colchester Visit Date/Time: 7/3/2019 11:00 AM Status: Inspected with Non-Compliant Location: LN-002063

DETAILS RELATED

Assessment Information

Participant Name: Flintstone Parent Assessment: /

Case: 00003082 Form Template: Initial Home Safety Assessment /

Location: LN-002063 Parent Assessment Name: /

Address & Scheduling

Assessment ID: AID-009877 Status: Inspected with Non-Compliant /

Physical Address: 79 Poor Farm Road Visit Date/Time: 7/3/2019 11:00 AM /

City: Colchester Assigned Service Coordinator: Allison StairClimb /

State/Province: VT Assigned Contractor: Allison Loebs /

Pre-Inspection Section

Fire Escape Plan? ☒ Certificate of Occupancy: ☐ /

Preinspection Complete: ☒ Water Test Requested?: ☐ /

Room Location(s): /

Additional Information

Offline Lock: ☐ Number of Assessment Items: 94

Created By: Allison Loebs, 7/3/2019 11:39 AM Number of Variance Items: 0

Last Modified By: Allison Loebs, 8/14/2019 4:06 PM Number of noncompliant Items: 0

Post

Share an update... Share

Search this feed...

Collaborate here!  
Here's where you start talking with your colleagues about this record

# Documents

Uploading documents into the Assessment is **REQUIRED**. Go to “Files” section and click the Upload Files button.

**IMPORTANT:** ALL documents are to be uploaded into the Related tab of the Initial Home Safety Assessment. The only exception to this is for an Emergency Placement.

*Note: The Housing Contractor may not schedule an assessment until these documents have been obtained.*

HOME LOCATIONS ASSESSMENTS

Assessment AID-000000

DETAILS RELATED

Files (0) Add Files

Upload Files Or drop files

Assessments (1)

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

View All

Assessment History (1)

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

View All





# DOCUMENT TYPES

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Documents that are uploaded into the Housing Portal **need** to have the correct naming convention.

The following documents types are not acceptable:

- Emails with a scanned document attached
- Documents within a document
- IMG

**Note:** *DALL may refuse to accept any documents that are not in the correct format or naming convention and ask the agency to upload them again.*



# Naming Convention for Documents

Documents that are uploaded into the Portal must begin with one of the assigned abbreviations so it may be located easily when needed and assist with the quality assurance and review process.

Manual instructions can be found at:  
<https://ddsd.vermont.gov/sites/ddsd/files/documents/NamingConventions-Documents-HousingPortal.pdf>

Document Type	Use Naming Convention*
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 – Attachment (When additional space is needed)	AMPR-1_(Participant Last Name)_(Date)
Receipts for Accessibility Reimbursement	Receipts_(AID#)_(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)
Fire Safety Escape Plan	FP_(Street and Town)
Chimney Cleaning Verification	Chimney_(Street and Town)
Guardian Support Letter	Support_Guardian_(Participant Last Name)_(Date)
Participant Support Letter	Support_Part_(Participant Last Name)_(Date)
Physical Therapist or Occupational Therapist document	PTOT_(Participant Last Name)_(Date)
Pre-Inspection Form, Home Safety	PI_(Street/Address)
Pre-Assessment Form, Accessibility	PAA_(Participant Last Name)_(Date)
Shared Location Agreement Form	SLA_(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)

# FORM TO SCHEDULE ASSESSMENT

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The Assessment needs to be entered into the housing portal, and documents uploaded,  
before contacting the Housing Contractor to schedule the Assessment.

The agency will fill out the DAIL Home Safety Assessment Request for Housing Contractor form, filling in the Assessment ID number from the Portal and all required information. The form must be saved using a similar naming convention:

**AR\_(Street)\_(Town)\_(Agency Acronym)**

The agency will send the completed form, with the correct naming convention, to the Housing Contractor through e-mail to schedule a time for the housing inspection to be completed.

Link to the [DAIL Housing Inspection Assessment Request Form](#)

# ASSESSMENT DATE

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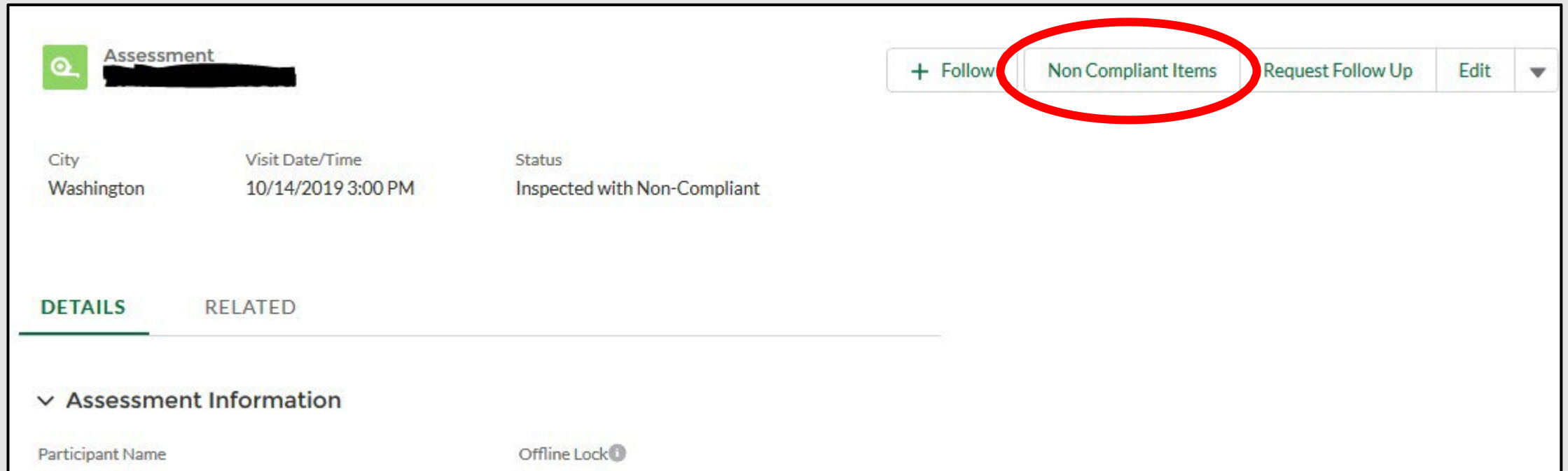
After a date has been established for the Home Safety inspection, the agency will go back into the housing portal to the Home Safety Assessment and do the following:

- Enter the date in which the Home Safety assessment is scheduled.  
When the date is entered, the 'Status' of the Assessment will automatically change from 'To be Scheduled' to 'Scheduled'

*This is an important step that is required in order for the housing contractor to be able to enter the Home Safety inspection information.*

# Non-Compliant Items

To review the Non-Compliant Items, from the ASSESSMENT, click:



The screenshot shows a web interface for an assessment. At the top left, there is a green icon with a magnifying glass and the word "Assessment" next to a redacted name. To the right of this header is a row of buttons: "+ Follow", "Non Compliant Items" (which is circled in red), "Request Follow Up", "Edit", and a dropdown arrow. Below the header, there is a table with three columns: "City", "Visit Date/Time", and "Status". The first row of data shows "Washington", "10/14/2019 3:00 PM", and "Inspected with Non-Compliant". Below the table, there are two tabs: "DETAILS" (which is selected and underlined) and "RELATED". Under the "DETAILS" tab, there is a section titled "Assessment Information" with a downward arrow. Below this section, there are two labels: "Participant Name" and "Offline Lock" with an information icon.

City	Visit Date/Time	Status
Washington	10/14/2019 3:00 PM	Inspected with Non-Compliant

**DETAILS** RELATED

▼ Assessment Information

Participant Name Offline Lock ⓘ

# NON-COMPLIANT ITEMS

Request Variance

Initiate Home Modifications

or

A combination of a variance and  
home modifications

The screenshot shows a web application interface for managing non-compliant items. The top navigation bar includes 'HOME', 'LOCATIONS', and 'ASSESSMENTS'. The main title is 'NON-COMPLIANT ITEMS'. On the left, there is a sidebar with a 'Close' button and a 'Save' button (highlighted with a red star and a red box). Below the sidebar, there are three tabs: 'SAFETY HAZARDS', 'All Non-Compliant' (selected), 'All Variance Items', and 'All Home Modification Items'. The main content area is a table with columns: 'Assessment Item Information', 'Result Resolution', 'Observation Notes', 'Corrective Action Notes', 'Variance Notes', 'Feedback', and 'Actions'. The table contains three rows of data. The first row (AI-7209) has 'Request Variance' in the 'Result Resolution' column. The second row (AI-7208) has 'Request Variance' in the 'Result Resolution' column. The third row (AI-7195) has 'Initiate Home Modifications' in the 'Result Resolution' column. A red box highlights the 'Result Resolution' column. Another red box highlights the 'Variance Notes' column for the second row, which contains the text 'Variance required- client will not access this area of the house'. The 'Actions' column contains icons for each row: a green checkmark and a red prohibition sign for the first two rows, and a green checkmark and a red prohibition sign for the third row. At the bottom of the form, there are 'Close' and 'Save' buttons.

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&C's missing, etc.)	Request Variance					
AI-7208 Electricity: Other findings	Request Variance			Variance required- client will not access this area of the house		
AI-7195 Water Heaters: The water heater has a PRV and a 1/2" discharge pipe from the valve to within 6" of the floor	Initiate Home Modifications					

## SCHEDULING A FOLLOW UP ASSESSMENT

**IMPORTANT:** The follow-up Assessment should always be created from the initial assessment via the request Follow-up button. (screenshot on next slide).



Service Coordinators **MUST** confirm in person that all required home modifications are completed prior to scheduling a Follow Up Assessment with the DAIL Housing Contractor.

A second Home Safety Assessment follow-up should not be necessary.



# Scheduling a Follow Up Assessment

The screenshot shows a web application interface for managing assessments. At the top, there is a green navigation bar with 'HOME', 'LOCATIONS', and 'ASSESSMENTS'. Below this, the header for the assessment 'AID-003806' is displayed. On the right side of the header, there are buttons: '+ Follow', 'Non Compliant Items', 'Request Follow Up' (highlighted with a red box and a red star), and 'Edit'. The main content area is divided into two columns. The left column contains details about the assessment, including 'Record Type' (DAIL Home Safety Assessment -Initial), 'Status', 'Form Template' (Initial Home Safety Assessment), 'Participant Name' (Smith), and a 'Pre-Inspection Section' with checkboxes for 'Fire Escape Plan?' and 'PreInspection Complete'. The right column contains a 'Post' section with a text input field and a 'Share' button, a search bar, and a feed of updates. The first update is from 'Amber DeVoss (Vermont Agency of Human Services)' stating 'updated this record. 36m ago'. Below the feed, there is a section for 'Assessment ID' with a note 'A blank value to AID-003806' and a 'Write a comment...' input field.

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

Case  
00002250

Parent Assessment

Activity Summary

Pre-Inspection Section

Fire Escape Plan?  
☒

PreInspection Complete  
☒

Room Location(s)

Certificate of Occupancy  
☐

Water Test Requested?  
☒

Post

Share an update... Share

Search this feed...

Amber DeVoss (Vermont Agency of Human Services) updated this record. 36m ago

Assessment ID  
A blank value to AID-003806

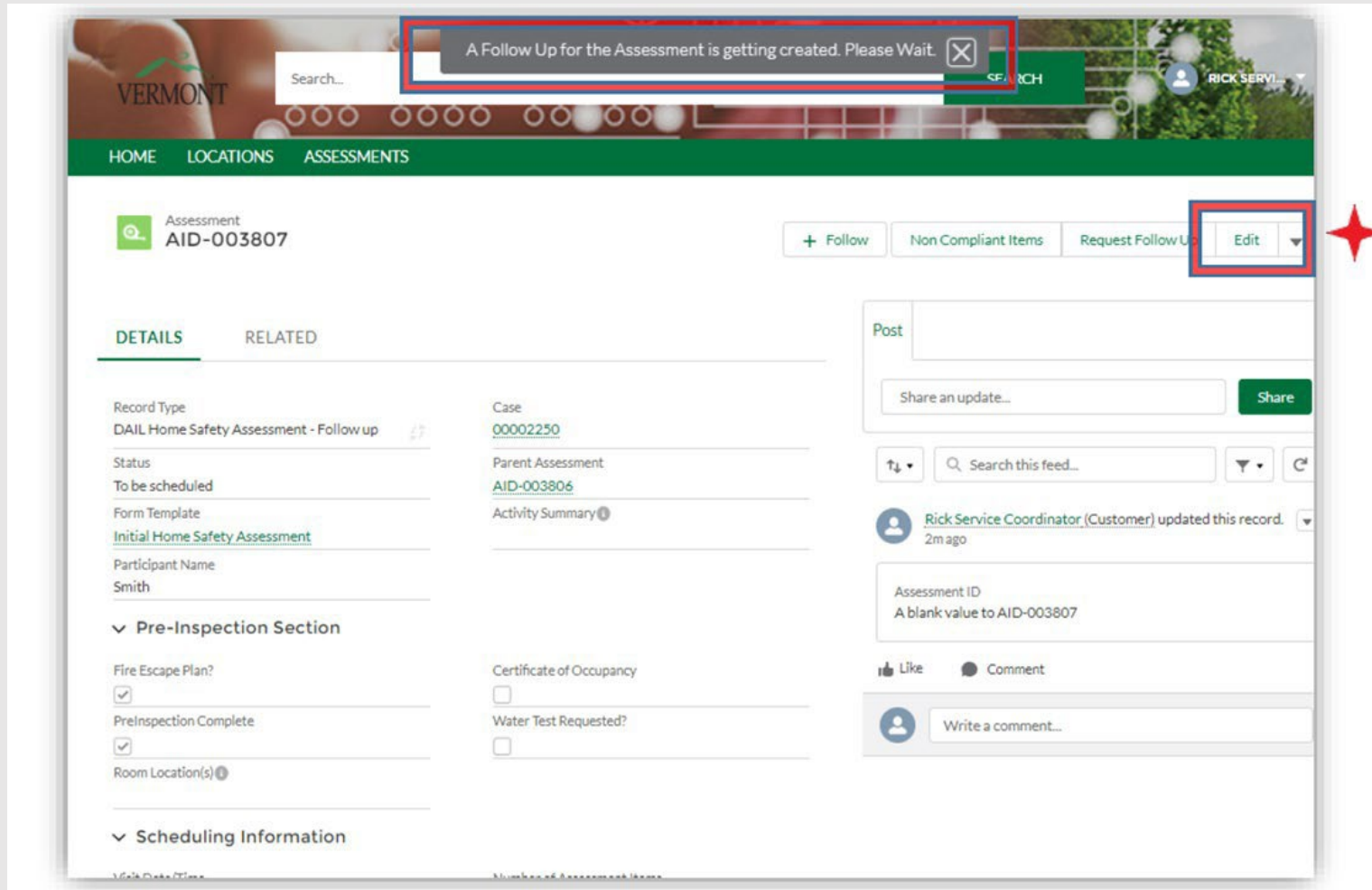
Like Comment

Write a comment...

The system will generate the follow-up Assessment and it may be necessary to refresh your browser to see. (**DO NOT CLICK THIS BUTTON TWICE**)



# Please Wait



The system will generate the follow-up Assessment and it may be necessary to refresh your browser to see.

# Approving a Case

Once ALL of the Assessments have been Approved, the agency needs to go back into the Portal and Approve the Case.

- If the Home Safety Assessment is Approved, but the Accessibility Assessment is not yet Approved, the Case **cannot** be Approved.
- If the Accessibility Assessment is Approved, but the Home Safety Assessment is not yet Approved, the Case **cannot** be Approved.
- If the Home Safety Assessment is Approved and a new Accessibility Assessment is needed (or visa versa), the Case Status should be Open until the new Assessment is successfully completed and Approved, then the Case Status is changed to Approved.

Note: This process includes Cases in which an Emergency Placement has been requested and ALL Assessments have been approved. Once all Assessments have been Approved, the Case Status should be changed from “Emergency Placement Approved” to “Approved.”

## APPROVING A CASE (CONT'D)

### IMPORTANT:

An agency should **NEVER** change the Status of an Assessment once the Housing Contractor has entered information for the Assessment. If the Housing Contractor has entered Assessment information and the agency feels there is an issue with the Assessment, please contact DAIL. *(This includes Non-Compliant Assessments when a Case is closed.)*

# Emergency Placements

1. Service Coordinator Creates the Case.	4. An automatic email will be received once a decision has been made by DAIL.
2. Select YES for Emergency Placement and enter Emergency Placement Comments for DAIL. Save.  <i>Once you save the record you will not be able to edit the Emergency Placement comments.</i>	5. Once the Placement is Approved, the Service Coordinator needs to create an Assessment and proceed as usual.  Note: The Documents uploaded for the Emergency Placement request will need to be uploaded again in the Related tab of the Assessment.
3. Upload documentation of pre-inspection completed by agency and the fire plan into the Related tab of the <u>Case</u> .  Wait for DAIL to submit a decision.	Initial inspections on the home must be completed within 30 calendar days of the approval date.

# CLOSING A CASE

A reason for closing the case is **required**.

The reason should be added in the  
“Description” field. (See list of reasons)

Manual instructions can be found on the Housing website at:  
[https://ddsd.vermont.gov/sites/ddsd/files/documents/DAIL\\_Housing-ClosingCase-AgencyUserManual.pdf](https://ddsd.vermont.gov/sites/ddsd/files/documents/DAIL_Housing-ClosingCase-AgencyUserManual.pdf)

DETAILS

RELATED

▼ Location & Participant Information

Participant Name

██████████

Case Number

0000██████

Location

LN-██████████

Status

Approved

Program

Home and Community Based Services

Assessment Expiration Date

9/28/2016

▼ Emergency Placement

Emergency Placement?

Emergency Placement Comment

▼ Additional Information

Account Name

Washington County Mental Health Services

Case Owner

Anne Maurice

Internal Comments

Description

▼ System Information

Created By

Deep Vakharia, 2/4/2019 4:15 PM

Last Modified By

Deep Vakharia, 2/5/2019 7:30 AM

Contact Name

Anne Maurice

Priority

Medium

Case Origin

Web

Web Email

Subject

# Reasons for closing a case

List of *potential reasons* that may be added to the “Description” of the Case when the Case is Closed:

5 Year Reinspection being done
Participant passed away
Participant moved out of the home
Participant left the program
SLP and Participant moved to new location

## CLOSING A CASE

### IMPORTANT:

- If a Participant and/or home provider moves to a new Location, do **NOT** change the information of the existing Location in the Housing Portal. The Case in the current Location needs to be Closed; the process for Location, Case, Assessment is followed to enter the information of the new Location.
- An existing Case needs to be closed and a new Case opened when a 5-year Reinspection is being completed – even if it is in the same Location or the same Participant.
- When a Case is closed, if the Assessment Status is Non-Compliant, it should NOT be changed.
- It is important to close any Cases for Participants who are not currently at a Location.



# How to close a Case

Within the case you will notice a spectrum with various statuses.

Click “Closed” - it will be highlighted in blue. Then Click “Mark as Current Status”

The screenshot shows a web browser window displaying a Salesforce case record for Case 00204254. The browser's address bar shows the URL: <https://uat-vermont.cs32.force.com/s/case/500r0000007UCSQA4/detail>. The user is logged in as LISA CHAM... The navigation bar includes links for HOME, LOCATIONS, ASSESSMENTS, and TASK. The case details section shows the case number 00204254, priority Medium, and status Open. A status spectrum is displayed with the following stages: Open, Emergency Placement Approved, Approved, Closed, and Mark as Current Status. The 'Closed' stage is highlighted in blue. Below the spectrum, there is a 'Mark as Current Status' button. The 'DETAILS' tab is selected, and the 'Location & Participant Information' section is expanded. The Windows taskbar at the bottom shows the time as 10:55 AM on 1/13/2021.

Case: 00204254

https://uat-vermont.cs32.force.com/s/case/500r0000007UCSQA4/detail

LISA CHAM...

HOME LOCATIONS ASSESSMENTS TASK

Case

Priority: Medium, Status: Open, Case Number: 00204254

Open Emergency Placement Approved Approved Closed Mark as Current Status

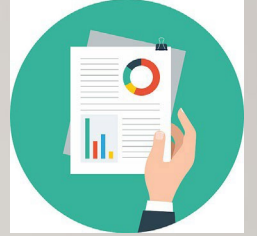
DETAILS RELATED

Location & Participant Information

Type here to search

10:55 AM 1/13/2021

# REPORTS



Manual instructions can be found on the Housing website at:

[https://ddsd.vermont.gov/sites/ddsd/files/documents/DAIL\\_Housing-PrintCase\\_Assessment\\_Reports-AgencyUserManual.pdf](https://ddsd.vermont.gov/sites/ddsd/files/documents/DAIL_Housing-PrintCase_Assessment_Reports-AgencyUserManual.pdf)

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The Reports available in the Housing Portal include:

- A record of all Home Safety Assessments for all shared living providers of your agency;
- List of Assessments that need to be completed;
- List of Assessments that have had non-compliant items for over 30 days;
- Locations that need 5-year re-inspections;
- Pending Variances, Shared Location Requests, and Emergency Placements

If you have suggestions of any reports that would be helpful that are not available, or if there are reports in which you feel different information would be helpful, please contact DAIL.

# TIDBITS

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- If you get an error message in the Portal, **Cancel**. If you cancel, it will not accept any information you tried to enter. If you 'x' out, some information may remain saved.
- Share information about new processes, forms, requirements for the Housing Portal with staff at your agency. There may be agency staff who do not work in the Portal but may need to know the correct process and requirements for the housing portal. Please share housing information widely with your agency staff.

If you have any questions, suggestions or  
need more information, please reach out to  
DAIL staff.

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DAIL Portal Workgroup  
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Please review and use the DAIL Housing Safety and Accessibility Manual when working in the Housing Portal, which can be found on the website at:

<https://ddsd.vermont.gov/services-and-providers/services/housing-safety-and-accessibility-process/inspection-accessibility-portal-manual>

DAIL Housing forms, protocol, training information, and other information can be found on the website at:

<https://ddsd.vermont.gov/services-providers/services/housing-safety-and-accessibility-process>

