

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

## **Printing Case, Assessment, Record and Reports**

March 2023

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

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

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

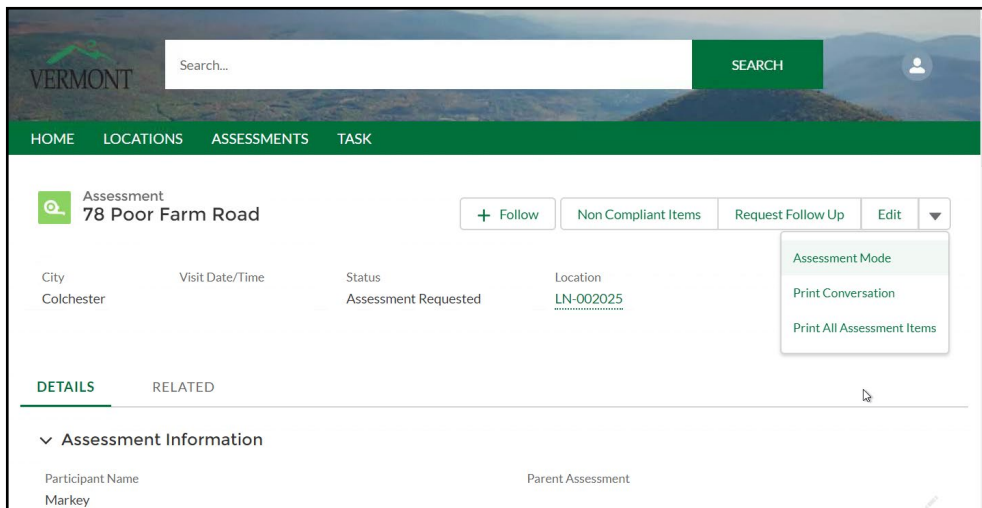
## Printing Assessment Items

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

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

Reminder:

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



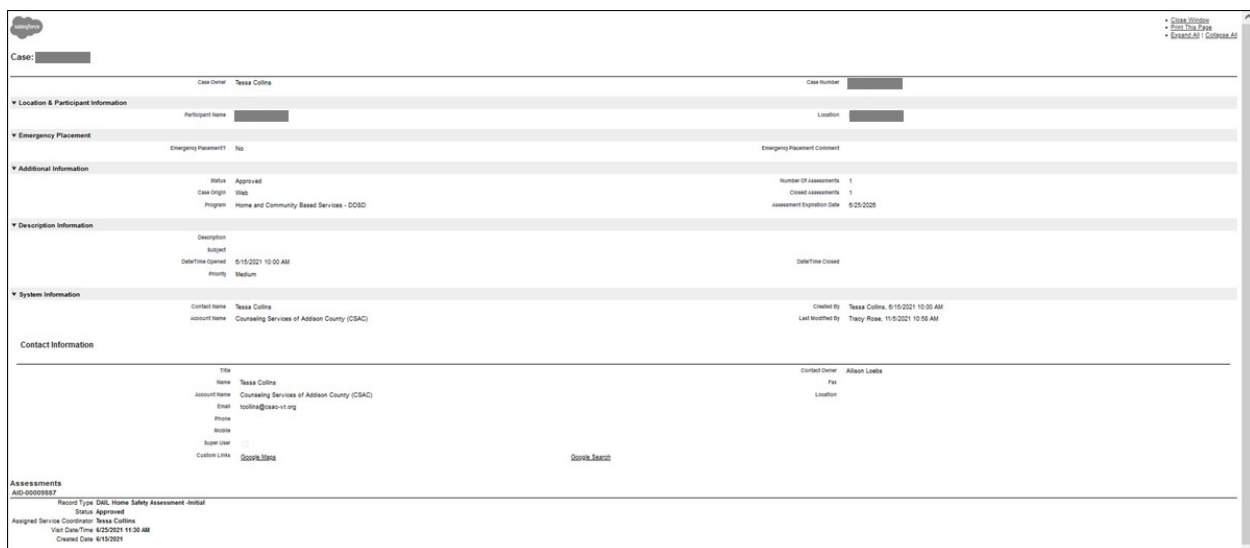
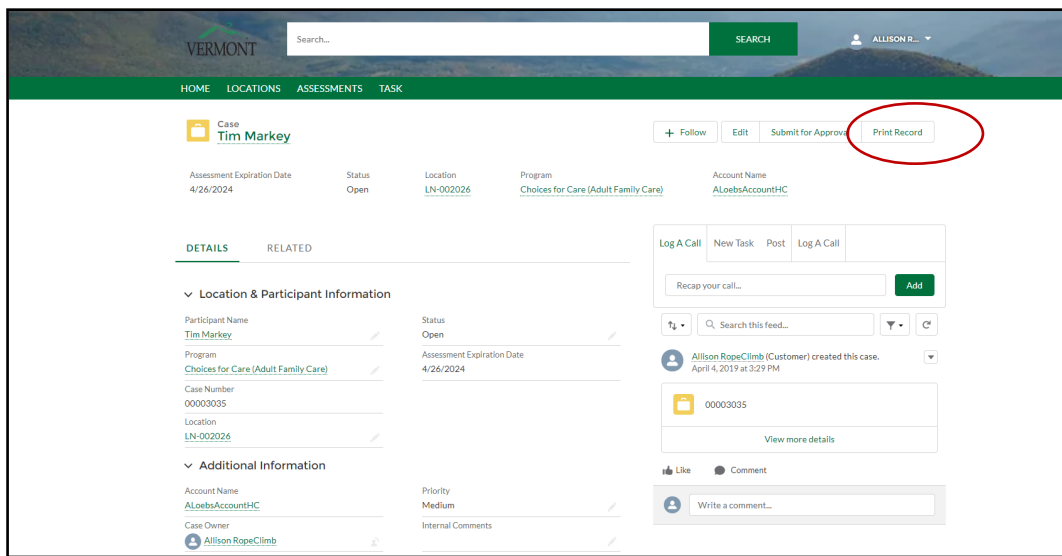
Category	Assessment Item Information	Result Resolution	Observation Notes	Corrective Action Notes	Variance Notes	Feedback
KITCHEN	AI-185306 Fire Extinguisher is a Minimum 3 pounds	N/A				
KITCHEN	AI-185368 Fire Extinguisher is Charged	N/A				
KITCHEN	AI-185367 Fire Extinguisher is mounted between heat source & exit path	N/A				
KITCHEN	AI-185365 GFCI at all electrical duplex 6' from sink	N/A				
KITCHEN	AI-185361 Other Findings	N/A				
BEDROOM 1	AI-185370 BDRM1 Location - looking from street to home:	N/A				
BEDROOM 1	AI-185371 BDRM1- Minimum Size 6.5' (height) x 8' (length) x 8' (width)	N/A				

## Print Case Record

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

### Reminder:

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

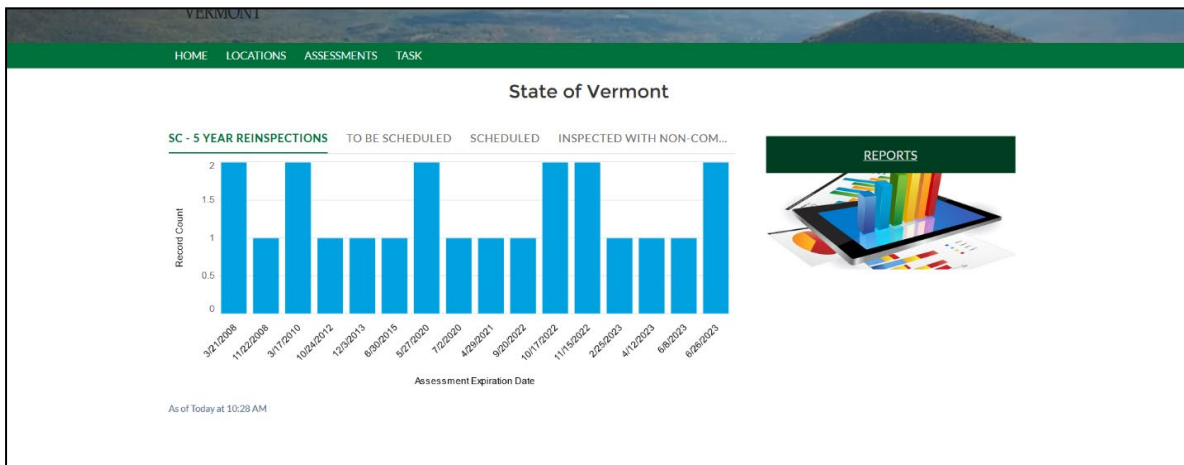


## Reports

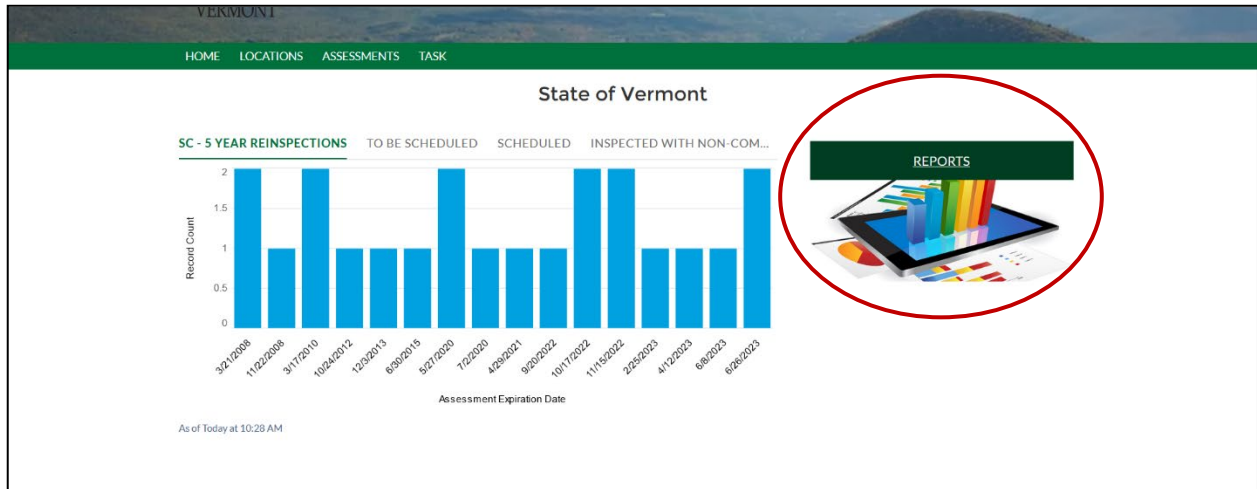
Some of the frequently used reports can be found on the Home Page or Dashboard. On the Dashboard click on a tab (SC-5 Year Reinspection, To be Scheduled, Scheduled, or Inspected with Non-Compliant), click on the chart, and View Report.

Once a Report is opened:

- The columns can be sorted (See below)
- The Report can be downloaded into an Excel Spreadsheet. (See below)



All reports, including the Dashboard reports, can be viewed by clicking **Reports** on the dashboard.



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

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

The screenshot shows the Vermont Reports page with a navigation bar (HOME, LOCATIONS, ASSESSMENTS, TASK) and a main section titled 'Reports'. It features a search bar and a table with columns: Name, Created By, Created On, Last Modified By, Last Modified Date. The table contains one row: Service Co-ordinator Reports, Data Service, 2/2/2019, 11:56 AM, Data Service, 2/2/2019, 11:56 AM.

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Service Co-ordinator Reports	Data Service	2/2/2019, 11:56 AM	Data Service	2/2/2019, 11:56 AM

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HOME LOCATIONS ASSESSMENTS TASK

Reports  
**All Folders > Service Co-ordinator Reports** Search all folders...

7 Items

REPORTS	Name	Description	Folder	Created By	Created On	Subscribed
Recent	SC - All Active Cases by Status	all active Cases by status excluding closed Cases.	Service Co-ordinator Re	Data Service	2/2/2019, 11:57 AM	
Created by Me						
Private Reports						
All Reports	SC - Inspected with Non-Compliant	All Assessments with a status of Inspected with Non-compliant. Exclude closed Cases from the report	Service Co-ordinator Re	Data Service	2/2/2019, 11:57 AM	
FOLDERS						
All Folders						
Created by Me	SC - 5 year Reinspections	All Assessment not closed that expired or will be expiring within the next six months.	Service Co-ordinator Re	Amber DeVoss	4/7/2019, 3:31 PM	
Shared with Me						
FAVORITES						
All Favorites	SC Assessment Status - Scheduled	Report for Service Coordinators of Assessments with sta-	Service Co-ordinator Re	Data Service	2/2/2019, 11:57 AM	

**Once a Report is opened:**

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

