

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

## Shared Location

### Housing Portal Process – Provider Agency

April 2023

DAIL considers a shared living home to be a **shared location** when more than one Provider Agency provides services to more than one individual receiving DAIL funded services at the same shared living location. When there are multiple Provider Agencies overseeing services at one shared living location, it is important for the agencies to clearly communicate with each other regarding relevant issues relating to the shared living home.

To determine if a home is a Shared Location and the actions required prior to Housing Portal entry, see the Shared Location Policy.

Once a shared location request has been reviewed by DAIL, the two agencies must work together on all aspects of the inspection process to ensure the home continues to meet the home safety requirements. Agencies should be in continued contact on any issue relating to the shared living home.

#### Housing Portal

Once both Agencies have completed the necessary steps and a decision has been made to share a Location,

- if the Location in the Housing Portal View button is not enabled (green), then a request for **Shared Access** by the Requesting Agency is necessary for the second Provider Agency to use the same Location. *Note: Only the Super User at each agency can request the **Shared Access** for a location.*
  - Note: During the agency's discussion about sharing the location, if it is determined that the current Provider Agency is not actively using the Location, the Provider Agency who needs access to the Location should contact the DAIL Housing Workgroup for assistance. Please *do not* proceed with the Shared Location process.
- if the Location in the Housing Portal View button is enabled (gray), the Location is already shared. However, a new Shared Location Agreement form **must** be filled out by each agency and uploaded into the Housing Portal each time a different Participant moves into the home (See **Participant in a Shared Location Changes** below)

*Once a Shared Access request is submitted in the Housing Portal, it remains pending until completed. Contact DAIL if the request is no longer necessary or if there are questions.*

The DAIL Quality Management Team will need to review the request to share a location before a participant from a second Provider Agency can be placed in the home.

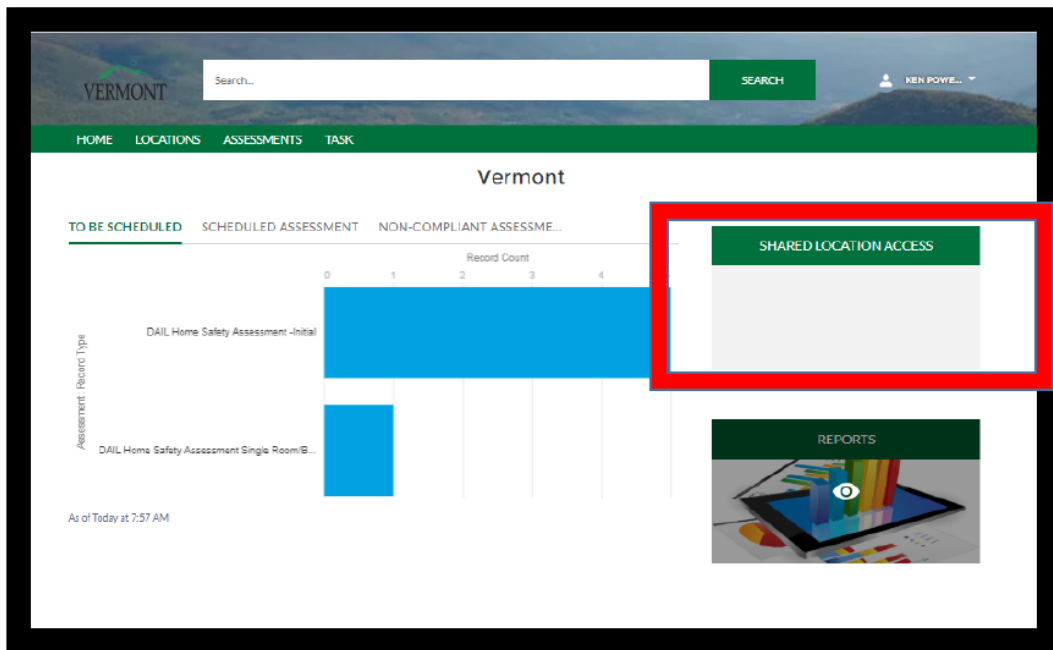
## Requesting Access of a Location Used by Another Agency

**Step 1:** Before requesting a Shared Location in the Housing Portal, see the Shared Location Policy for the steps required prior to the Portal entry.

*Only the Super User at each Provider Agency  
is able to see and take action on a Shared Location request.*

**Step 2:** On the Homepage, the requesting Provider Agency should click on **Shared Location Access** to see if a request for Shared Access has already been submitted. If there is a pending request, use this request to finish the process, **do not** click on the Request Access button again (Step 3).

The Shared Location Access icon opens into multiple lists for the Shared Location Requests involving the agency. Click the arrow at the top of the list to change to a different list.



**Step 3:** The requesting Provider Agency searches for the Location in the Housing Portal and clicks on the **Request Access** button. A confirmation message will appear on top left-hand side.

The current Provider Agency will receive an automated system notification about the request.

The requesting Provider Agency should contact the Super User at the current Provider Agency by phone or email to confirm the request for a shared location was received.

The screenshot shows the Vermont Housing Safety Inspection and Accessibility Portal. At the top, there is a search bar with the text "Search..." and a "SEARCH" button. The user's name "ALLISON S..." is visible in the top right corner. Below the search bar, there is a navigation menu with "HOME", "LOCATIONS", "ASSESSMENTS", and "TASK". A green confirmation banner at the top of the main content area reads "Confirmation Location is Requested. Please wait for Approval". Below this, there is a "BACK" button, a search input field containing "207 fox run", a "SEARCH LOCATION" button, and a "NEW" button. The main content area is titled "List of Locations" and contains a table with the following data:

Location ID	Physical Address	City	State	Zip Code	Last Assessment Date	View
LN-002045	207 Fox Run	Colchester	Vermont	05446		<a href="#">View</a> <a href="#">Request Access</a>

The screenshot shows an email from noreply@salesforce.com on behalf of Allison StairClimb <allison.loeb@vermont.gov>. The subject is "Sandbox: TEST Only: Requesting Guardian Approval for Shared Location". The email content is as follows:

Hello,

You have a Shared Location Request seeking Guardian Approval for

Address: 207 Fox Run, Colchester  
Requesting Provider Agency: ALoebAccountUC

Link :- <https://uat-uat-vt-AHS.CS33.force.com/a0D350000014jig>

Training materials:

Requesting/Approving Shared Locations

The first 10 minutes of the video below reviews the process for requesting/approving shared locations.

Shared Location video link:  
Note: You need only watch the first 10 minutes.  
<https://vimeo.com/328210960>

Password for the video:  
DAILuser

**Step 4:** The current Provider Agency opens the **Request Access Record**, and clicks the **Related** tab.

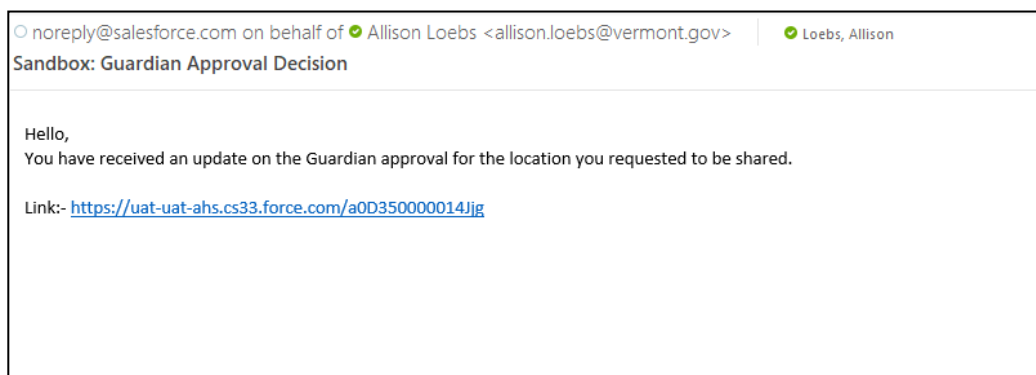
The screenshot shows the Vermont Housing Safety Inspection and Accessibility Portal. The header includes the Vermont logo, a search bar, and the user name 'ALLISON R...'. The navigation menu has 'HOME', 'LOCATIONS', 'ASSESSMENTS', and 'TASK'. The main content area is titled 'Request Access' and 'Incoming Shared Location Request'. It shows 3 items, sorted by Request Access Name, filtered by all request access - Status, Current Provider Agency Check, and updated a few seconds ago. A table lists the requests with columns for Request ID, Physical Address, Location, Requesting Provider, Status, and Created Date.

REQUEST...	PHYSICAL ADDRESS	LOCATION	REQUESTING PR...	STATUS	CREATED DATE	
1	RAN-00035	78 Poor Farm Road, Colchester	LN-002025	ALoebAccountUC	Guardian Approved	4/4/2019 3:18 PM
2	RAN-00037	1145 Malletts Bay Avenue, Colchester	LN-002026	ALoebAccountUC	Waiting on Guardian	4/4/2019 4:00 PM
3	RAN-00042	207 Fox Run, Colchester	LN-002043	ALoebAccountUC	Waiting on Guardian	5/23/2019 2:40 PM

The current Provider Agency will upload the DAIL Shared Location Agreement form into the **Related** tab of the RAN and update the **Guardian Approval** to **Approved**.

The Requesting Provider Agency will receive an automated email notification from the system of the Guardian Approval Decision.

If the Request for **Shared Location** is Denied by the current Provider Agency, other arrangements for the participant will need to be made.



Request Access

**30 Shared Location Street, Montpelier**

Current Provider Agency

[Specialized Counseling Committee](#)

Provider Agency Contact

[Ken Powers](#)

Requesting Provider Agency

[Lamoille County Mental He](#)

DETAILS
RELATED

▼ **Current Provider Agency**

Current Provider Agency <a href="#">Specialized Counseling Committee</a>	Provider Agency Contact <a href="#">Ken Powers</a>
Physical Address 30 Shared Location Street, Montpelier	Location <a href="#">LN-002013</a>

▼ **Requesting Provider Agency**

Requesting Provider Agency <a href="#">Lamoille County Mental Health Services (LCMHS)</a>	Owner <a href="#">Sarah Shirley-Eldred</a>
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▼ **Guardian Section**

Guardian Approval Status	Guardian Comments
Guardian Approval Date	

Request Access Name RAN-00038	Status Waiting on Guardian
Created By <a href="#">Sarah Shirley-Eldred, 5/13/2019 9:36 AM</a>	Last Modified By <a href="#">Sarah Shirley-Eldred, 5/13/2019 9:36 AM</a>

**Step 5:** From the Home screen click, the Requesting Provider Agency goes to the **Shared Location Access** button on the right-hand side of the screen and opens the **Request Access** record. The **Guardian Approval Status** is now **Approved**.

Request Access

**65 Main street, stowe**

Current Provider Agency

[ALoebAccountUC](#)

Provider Agency Contact

[Allison StairClimb](#)

Requesting Provider Agency

[ALoebAccountHC](#)

Created By

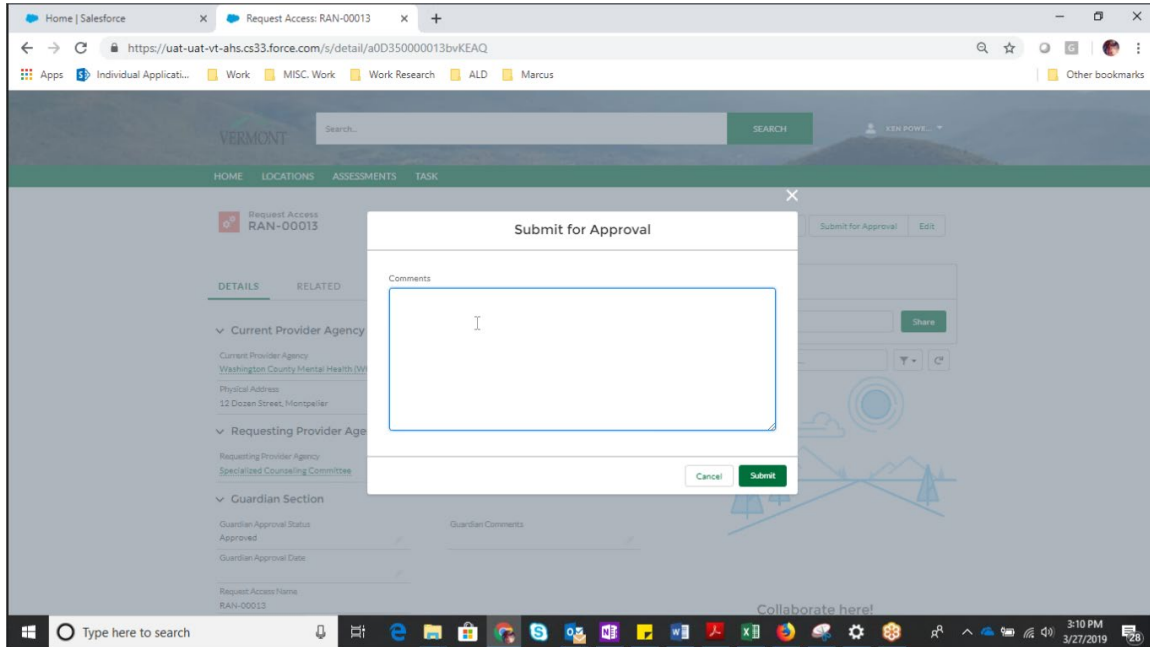
[Allison RopeClimb, 5/14/2019 12:57 PM](#)

Status

Guardian Approved

**Step 6:** The Requesting Provider Agency clicks on the **Related** tab and uploads the DAIL Shared Location Agreement form, then clicks back to **Details** and clicks the **Submit for Approval** button.

An automated system notification email goes to the Super User at the Current Provider Agency requesting them to approve or deny the request.



**Step 7:** The Current Provider Agency clicks the link in the e-mail and scrolls down to the **Approval History** section and clicks **Approve or Deny**.

An automated system notification email will then be sent to the DAIL Quality Management Team for review.

**Step 8:**

The DAIL Quality Management Team will review the Shared Location Agreement forms and any other information that may have been uploaded.

- a) If everything is in order, the Location is Shared and an automated system notification e-mail will go to both the Super User at the requesting Provider Agency and the Super User at the current Provider Agency. The **Shared Location** is now available to be viewed by the requesting providing agency.
- b) If the information does not support sharing the Location, both agencies will receive an automated system notification and other arrangements for the second Participant will need to be made by the requesting Provider Agency.

## Home Safety Inspection or Re-Inspection for Shared Location

Only one Home Safety Assessment is necessary for a Location. The Provider Agencies need to determine which agency will take the lead for the Home Safety Inspection and entry of the information into the Housing Portal. However, both agencies must maintain close communication throughout the process.

## Change of a Participant in a Shared Location

An approved Shared Location Request is person specific. A new Shared Location Request will need to be submitted if a new Participant moves into the home. The process for a new Participant in an existing Shared Location requires different steps.

If one of the Participants move out of a Shared Location home and there is a proposal for a new Participant to move into the Shared Location:

- The two agencies are expected to be in close communication and will complete the required actions prior to the Housing Portal steps. (See Shared Location Policy)

Once it is determined the home will be shared with the new Participant:

**Step 1:** See the Shared Location Policy for the steps required prior to the Portal entry.

**Step 2:** A DAIL Shared Location Agreement form is required to be filled out by each agency and uploaded into the prior RAN request:

- Click on the **Related** tab of the **Location**, then click on the **RAN**

*Only the Super User at each Provider Agency  
is able to see and take action on a Shared Location request.*

**Step 3:** The Provider Agencies will notify DAIL of the uploaded forms by e-mailing [AHS.DAILHousingPortal@Vermont.gov](mailto:AHS.DAILHousingPortal@Vermont.gov) and include the LN number in the Subject line.

**Step 4:** Once the new request is reviewed by DAIL, DAIL will add a note in the **Location Comments** to reflect the updated Shared Location information, and will notify the agency of the update.

## Location and RAN not Available

In limited situations, a Location that may have been used by a Provider Agency in the past and after a period of non-use of the home, the agency will be using the home again and sharing the Location with the current Provider Agency. In these instances, both Provider Agencies already have access to the Location in the Housing Portal and a RAN is not available, and cannot be requested. The process to Share the Location is still required to be completed.

**Step 1:** See the Shared Location Policy for the steps required prior to the Portal entry.

**Step 2:** A DAIL Shared Location Agreement form is required to be filled out by each agency and uploaded into the Related tab of the Case for their Participant.

**Step 3:** The Provider Agencies will notify DAIL of the uploaded forms by e-mailing [AHS.DAILHousingPortal@Vermont.gov](mailto:AHS.DAILHousingPortal@Vermont.gov) and include the LN number in the Subject line.

**Step 4:** Once the new request is reviewed by DAIL, DAIL will add a note in the **Location Comments** to reflect the updated Shared Location information, and will notify the agency of the update.