

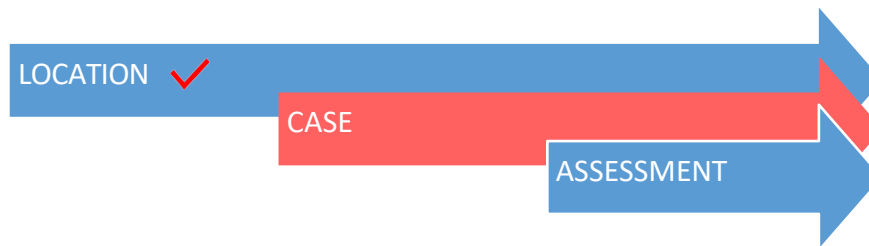
Department of Disabilities, Aging, and Independent Living (DAIL)
Home Safety Inspection and Accessibility for Shared Living

Agency Portal User Manual

Creating a Case

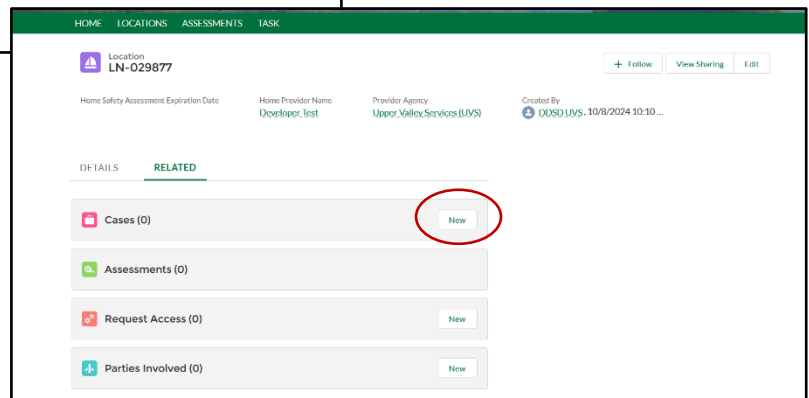
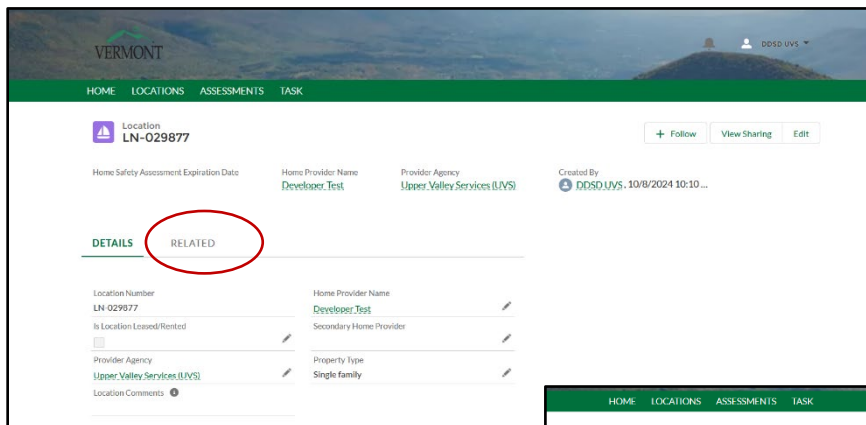
November 2024

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



A new Case is created when a Participant moves to an existing Location, a new Location, or when a 5-year reinspection is required for the Location.

Open the **Location**, click the **Related** tab, go to **Cases** section and click **New**



Complete the fields according to the steps below

Step 1 – Enter Participant Name

Start typing the **Participant's Name**. If the Participant is already in the system, it will appear. 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.
 - *If there are two Participant names in the system that are the same name, contact DAIL before proceeding.*
- If the Participant is NOT in the system, click **NEW CONTACT** to add a new Participant.

Adding a New Participant:

- Click on **New Contact**
- Enter Participant's **First Name** and **Last Name**
- Enter **Account Name** - For a Participant this is always **Citizen Public**
- *Remaining fields may be left blank*
- **Save Contact**

Step 2 – Status

Status remains Open; there is nothing to change in this field.

Step 3 – Move In Date

Enter the date the Participant moved into the home (If date is not available when creating the Case, it may be added later)

Step 4 – Choose the Program

Start typing the name of the program in which the Participant is receiving services, and it will appear.

- Home and Community Based Services - DDSD
- Choices for Care (Adult Family Care)
- Brain Injury Program

Step 5 – Enter Mobility and Accessibility Needs

- Click on item to highlight,
- Click on chevron to move it to the next column, Chosen

Repeat this step to add all Mobility and Accessibility Needs (multiple items may be Chosen)

Step 6 - Save

The newly created **Case** is now related to the **Location**

New Case: DAIL

* = Required Information

Location & Participant Information

* Participant Name: Stage Tester
Move-in Date: 10/2/2024
Case Number: LN-029877

* Status: Open
* Program: Home and Community Based Services - DDSD
Accessibility Assessment Expiration Date

Mobility and Accessibility Needs

Available: Independent, Hearing impairment, Visual impairment
Chosen: Uses a walker or oth..., Other mobility assist...

Emergency Placement

Emergency Placement?: --None--
Emergency Placement Comment: Salesforce Sans, 12

Buttons: Cancel, Save & New, Save

HOME LOCATIONS ASSESSMENTS TASK

Location LN-032801

Home Safety Assessment Expiration Date: Home Provider Name: Developer Test, Provider Agency: Upper Valley Services (UVS), Created By: Dailds Uvs, 11/14/2024 9:25 AM

DETAILS RELATED

Cases (1)

Case Number	Participant Name	Status	Date/Time Opened
02380170	Stage Tester	Open	11/14/2024 9:28 AM

Assessments (0)

Request Access (0)

To open the **Case**, click the **Case Number**