

The VIVÉ Case Notes Reference Guide

VIVÉ is a customized client management system designed by NYC Aging. This system supports NYC Aging contractors in managing their client interactions and reporting on services provided. This reference guide provides instructions on creating and viewing, editing, and finalizing **Case Notes**.

Case Notes is a common functionality within VIVÉ. You may access this guide from the VIVÉ Knowledge Base or from a program specific reference guide. At the beginning and end of this document is a link to return to the [VIVÉ Knowledge Base](#). Users can also use their browser's back button to return to the program reference guide.

This guide provides navigational and functional instructions. For assistance with program operations or policy, please refer to your program officer or view [NYC Aging's Program Standards](#).

In this guide you will learn:

- **Case Notes Overview**
- **Entering Case Notes**
- **Editing Case Notes**
- **Finalizing Case Notes**
- **Printing Case Notes**
- **Linking Case Notes to Units**

Case Notes Overview

Case Notes detail interactions with clients and record important client information. They are an opportunity to provide a deeper understanding of your client and their situation. **Case Notes** document what is happening with your client: what are the client's needs, how they are addressed, explanation and record of services provided, and if there are any outstanding issues. Additionally, they are a vehicle for supervision and oversight.

TIP: *Be considerate and careful when writing case notes. They are legal documentation, which maybe reviewed during audits, assessments, and legal proceedings.*

Entering Case Notes

Step 1: From the **Top Menu**, click **Client Search**, find the desired client and click on their name link.

Step 2: From the **Details** menu, click on the **Enrollment** tab and your program enrollment link.

Step 3: From the **Enrollment Details** menu, click on the **Case Notes** tab section and select **New Case Note** button.

The screenshot shows the 'Case Notes' tab in the system. At the top, there are tabs for 'Enrollment Details', 'Forms', 'Event Signup', 'Case Notes', 'Unit Entry', 'Follow up', 'Contacts', 'Documents', and 'Status History'. Below these tabs, there are input fields for 'From' and 'To' dates, and a 'Filter' button. A table titled 'Case Notes (2)' displays two entries. The 'New Case Note' button is highlighted with a red box.

Subject	Note Type	Service Date	Status	Comments	Program Name	Own/Shared Note	Created By	Created Date
1 Discussed Living Situ...	Office Visit	01/12/25	Draft	Nat is experimenting ...	Older Adult Center - ...	Own	David Dring	01/26/25
2 Benefits Discussion	Office Visit	01/19/25	Final	Nat wanted an overvi...	Older Adult Center - ...	Own	David Dring	01/26/25

Step 4: A pop-up menu will appear to enter the notes. Keep in mind fields preceded by a red asterisk (*) are required. Follow these instructions when entering the fields:

The 'New Case Note' form contains the following fields:

- Service Date:** A date picker showing 'Nov 7, 2024'.
- Contact With:** A dropdown menu showing 'Katie Client (Client)'.
- Status:** A dropdown menu showing 'Draft'.
- *Note Type:** A dropdown menu showing 'Phone Call'.
- *Subject:** A text input field containing 'Calling to check in on client'.
- Comments:** A large text area containing 'Client has not been at the center in two weeks which was unusual. Client reported she was in the hospital recently due to a fall at home. She is home now and feeling better and reports she plans to be back at the center next week.' The character count is '232 / 10000 characters'.
- Share with Other Programs?:** A checkbox that is currently unchecked.

At the bottom of the form are 'Cancel' and 'Submit' buttons.

Service Date defaults to today's date. It can be a previous date, but not one in the future. **Contact With** can be either the client or one of the client's contacts. **Status** defaults to draft until finalized. **Note Type** varies depending upon your program (required). **Subject** is a title for the note (required). **Comments** (the actual Case Note) allows up to 10,000 characters for your note.

Select **Submit** to save the note.

TIP: The system will become inactive, and you could lose your work, if you do not click/type for 20 minutes. Clicking or typing within the text area within that 20 minutes will start the clock over.

Editing Case Notes

Step 1: From the **Details** menu, click on the **Enrollment** tab and your program enrollment link.

Step 2: From the **Enrollment Details** menu, click on the **Case Notes** tab.

Step 3: Click on the Subject name link to access the details of the **Case Note**.

Enrollment Details Forms Event Signup Case Notes Unit Entry Follow up Contacts Documents Status History

From To Filter

Case Notes (2) New Case Note Print Case Notes

	Subject	Note Type	Service Date	Status	Comments	Program Name	Own/Shared Note	Created By	Created Date
1	Discussed Living Situ...	Office Visit	01/12/25	Draft	Nat is experimenting ...	Older Adult Center - ...	Own	David Dring	01/26/25
2	Benefits Discussion	Office Visit	01/19/25	Final	Nat wanted an overvi...	Older Adult Center - ...	Own	David Dring	01/26/25

Showing 1 of 1 Page(s) << First < Previous Next > Last >> Total Records: 2

Step 4: Click on the pencils within the **Case Note** details to edit the fields. Once finished select **Save** located at the bottom of the form.

Details

Service Date
12/13/2024

Subject
Intake details

Program Name
Older Adult Center - BAY RIDGE - Life Long

Comments
Met with client and completed the intake in person. Still need to enter details into VIVE.

Created By
David Dring

Owner
Older Adult Center - BAY RIDGE - Life Lo

Status
Draft

Note Type
Phone Call

Share with other programs?
☐

Last Modified By
David Dring

TIP: When editing the note (comments), you can drag the lower right corner down to expand the window and view more of the note.

Finalizing Case Notes

To complete the note taking process, Case Notes must be finalized. The pathway for this process is to access the details of the **Case Notes**. There all the information about the note can be reviewed and the status can be changed to final. Once final, the case note can no longer be edited.

Details

* = Required Information

Service Date
12/13/2024

*Subject
Intake details

Program Name
Older Adult Center - BAY RIDGE - Life Long

Comments
Met with client and completed the intake in person. Still need to enter details into VIVE.

Status
Final
--None--
Draft
✓ Final
Inactive

Printing Case Notes

Step 1: There is a button to **Print Case Notes** from the list view of the **Case Notes** section. Click this button to initiate a print view of all the case notes for this client. The notes will be printed as a PDF file.

Enrollment Details Forms Event Signup **Case Notes** Unit Entry Follow up Contacts Documents Status History

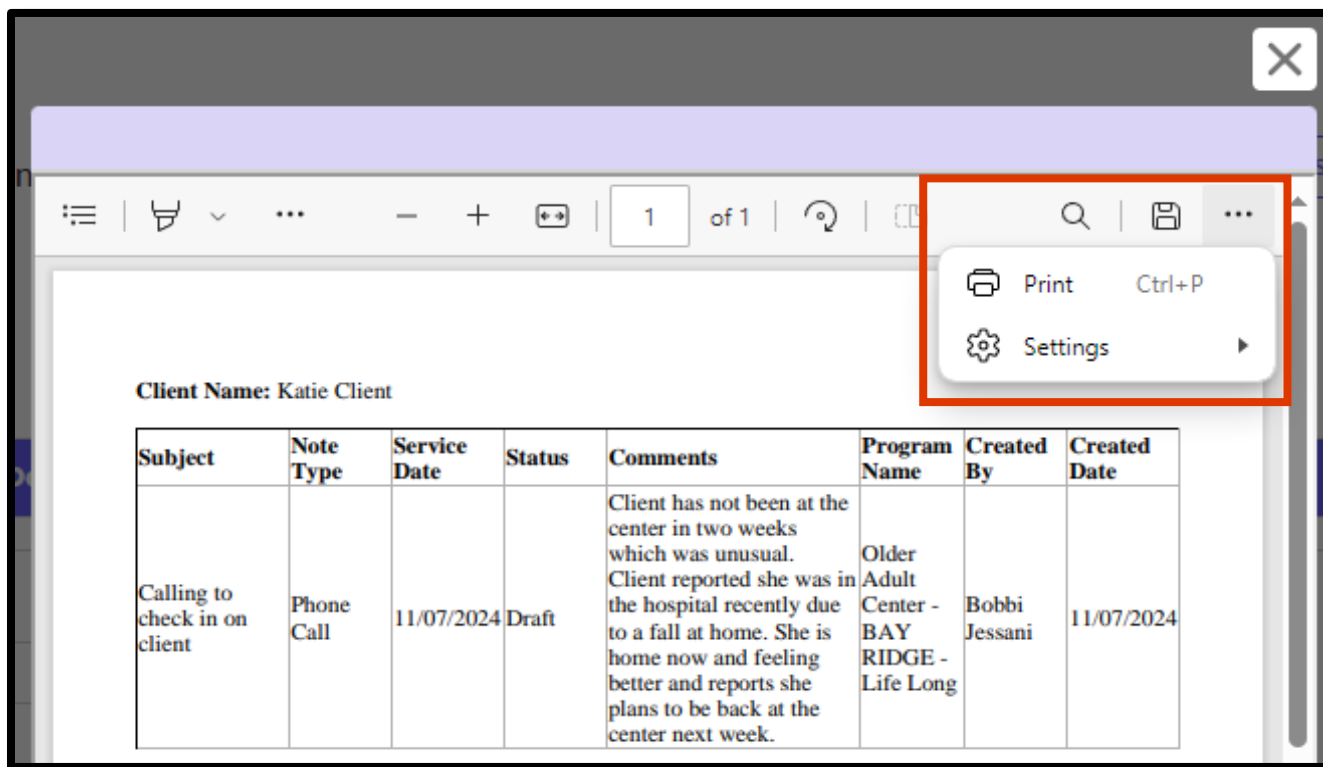
From To Filter

Case Notes (8) New Case Note Print Case Notes

	Subject	Note Type	Service Date	Status	Notes	Program Name	Own/Shared Note	Created By	Created Date
1	Calling to check in on...	Phone Call	02/23/25	Draft	Client has not been a...	Older Adult Center - ...	Own	David Dring	02/23/25
2	Follow up phone call ...	Phone Call	12/16/24	Draft	SNAP confirmed they...	Older Adult Center - ...	Own	Bobbi Jessani	12/16/24
3	Karyn's Case Note an...	Phone Call	11/26/24	Final	here is my case note	Older Adult Center - ...	Own	Karyn Velez	11/26/24

To make it easier to find a particular note you can enter a date range in the “From” and “To” fields.

Step 2: A PDF print pop-up window will appear. Use your local printer's settings to print the notes.

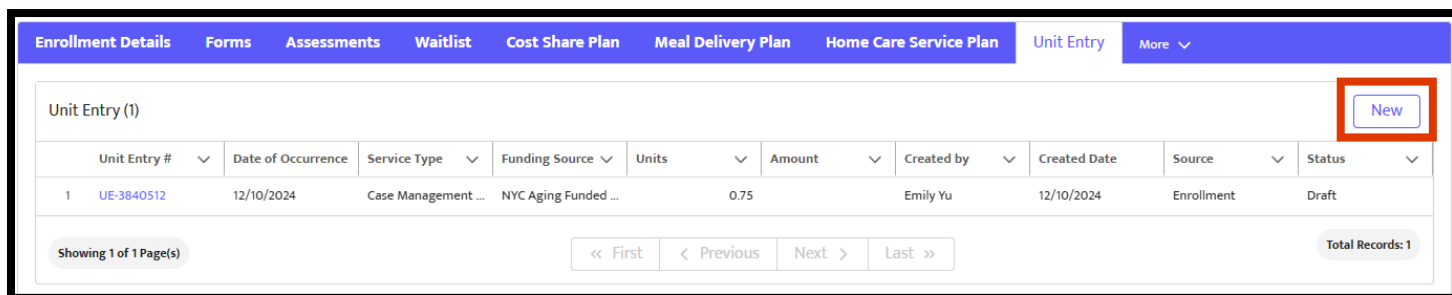


Linking Case Notes to Units

For those programs where it applies, case notes can be attached to units to track agency activities. At the bottom of the **Unit Entry** form, there is a list of the finalized case notes.

Step 1: Access **Unit Entry** from **Enrollment Details Menu**.

Step 2: Select **New** to enter a new unit.



VIVÉ Knowledge Base – Case Notes

Step 3: At the bottom of the **Unit Entry** form, is a list of finalized case notes. Use the check box to the left of the row to indicate the related case note. There can be more than one case note linked to a unit.

Unit Entry

* Date of Occurrence

Jan 27, 2025

Enrollment

Case Management - NSHOPP - CMA

* Service Type

Case Management - DFTA Funded

* Funding Source

NYC Aging Funded Service

* Time Spent

60 min

Service Comments

see case note

* Status

Draft

Client

Everything VIVÉ

Host Type

Telephonic

Unit Type

Hour

* Total Units

1.00

Case Notes

<input checked="" type="checkbox"/>	Subject	Note Type	Contact Name	Service Date	Status	Created Date	Created Name
<input checked="" type="checkbox"/>	Spoke with Landlord on behal...	Phone Call	Everything VIVÉ	01/27/2025	Final	01/28/2025	David Dring

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Total Records: 1

Cancel

Save

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

- [VIVÉ Knowledge Base](#) contains reference guides, short videos and recorded trainings.
- Direct toward ticketing vs email: If you have any questions, please contact the **VIVÉ Application Support Center** by submitting a ticket through the **Ticketing Module** under **Program Tools**.

[Return to VIVÉ Knowledge Base](#)

VIVÉ a Product of NYC Aging

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Last Updated: 4/15/2025