

The VIVÉ Enrollments Reference Guide

VIVÉ is a customized client management system designed by NYC Aging. This system supports NYC Aging contractors to help manage their client interactions and report on services provided.

This reference guide provides instructions on **Creating, Approving, Rejecting, Assign Worker, On Hold, and Closing Enrollments**. **Enrollments** 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](#). You can also use your 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](#).

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Overview of Enrollments

Enrollments is the secondary level for client data entry in VIVÉ. This level provides the ability to register the client with your specific program. **Enrollments** enable access to essential database features, including intake and various assessment forms, contact and document management, case notes, unit entry, waiting list management, and other key data entry tasks on the **Enrollment Details**

Menu bar. Additional features available at this level include **Approve**, **Reject**, **Assign Worker**, **On Hold** and **Closing Enrollment**.

Navigating Enrollments

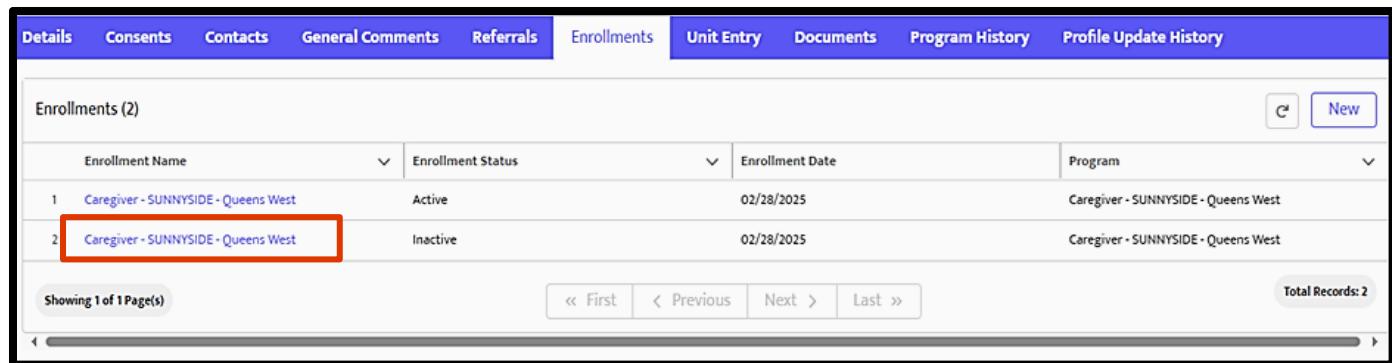
The **Enrollment** menu contains various tabs providing access to capture information about the client and track the work done on their behalf. The default tab on the menu bar will be **Enrollment Details**. Depending on the program type, the status of an enrollment will either default to **Active** or **In Review** unless changed.

Determining Client Enrollment

Step 1: Perform a **Client Search** and select the link of the desired client to open their profile.

Step 2: Select the **Enrollments** tab. A List View of any active or inactive enrollments will appear.

Step 3: If a record is displayed on the List View with an **Enrollment Status** of **Active**, then the client is currently enrolled in your program. To access details about the client's enrollment, select the **Enrollment Name** link for the enrollment you wish to view. A new window will appear.



Enrollment Name	Enrollment Status	Enrollment Date	Program
1 Caregiver - SUNNYSIDE - Queens West	Active	02/28/2025	Caregiver - SUNNYSIDE - Queens West
2 Caregiver - SUNNYSIDE - Queens West	Inactive	02/28/2025	Caregiver - SUNNYSIDE - Queens West

The top portion of the enrollment page will display the client's name, the name of assigned worker, and several navigational buttons that provide access to other database features. In addition, it also provides an overview of the enrollment record, **Referral Information**, **On Hold Details**, **Enrollment Closing Details**, and **System Information**. You may edit any fields by clicking on the pencil icons on the **Enrollment Details** form.

VIVÉ Knowledge Base – Enrollments

The screenshot shows the 'Enrollment' section for 'Older Adult Center - BAY RIDGE - Life Long'. At the top, there are three buttons: 'Assign Worker', 'On Hold', and 'Closing Enrollment', all of which are highlighted with a red box. Below this, the 'Contact' is listed as 'test-joe client' and 'Assigned To' as 'Karyn Velez'. A navigation bar at the top of the page has tabs: 'Enrollment Details' (highlighted with a red box), 'Forms', 'Event Signup', 'Case Notes', 'Unit Entry', 'Follow up', 'Contacts', 'Documents', and 'Status History'. Under the 'Enrollment Information' section, the 'Enrollment Name' is 'Older Adult Center - BAY RIDGE - Life Long' and the 'Enrollment Status' is 'Active'.

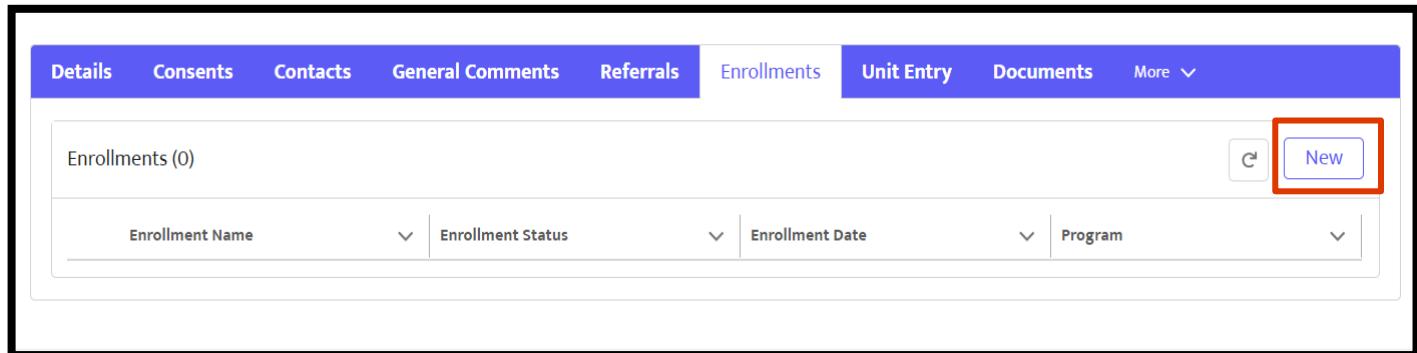
Creating Enrollments

The **Enrollment Status** of the client will also display as **Active** by default unless changed. If no record is displayed on the Enrollments list view, then a new enrollment can be created.

The screenshot shows the 'Enrollment' section for 'Caregiver - SUNNYSIDE - Queens West'. At the top, there are three buttons: 'Assign Worker', 'On Hold', and 'Closing Enrollment'. Below this, the 'Contact' is listed as 'Maybel Mayweather' and 'Assigned To'. A navigation bar at the top of the page has tabs: 'Enrollment Details' (highlighted with a red box), 'Forms', 'Assessments', 'Event Signup', 'Case Notes', 'Unit Entry', 'Follow up', 'Contacts', 'Documents', and 'Status History'. Under the 'Enrollment Information' section, the 'Enrollment Name' is 'Caregiver - SUNNYSIDE - Queens West' and the 'Enrollment Status' is 'Active' (highlighted with a red box). The 'Program' is listed as 'Caregiver - SUNNYSIDE - Queens West'. In the 'Referral Information' section, there is a 'Linked Referral' and a 'Referring Agency Name' field with a red box around it. The 'Referring Worker Name' field is empty. A section titled 'On Hold Details' is shown with 'On Hold Start Date' and 'On Hold End Date' fields. A section titled 'Enrollment Closing Details' is shown with 'Closing Date' and 'Closing Code' fields. The 'Closing Reason' field is empty. In the 'System Information' section, 'Created By' is 'Jamie L Foronda', 'Last Modified By' is 'Jamie L Foronda', 'Created Date' is '2/19/2025, 1:26 PM', and 'Last Modified Date' is '2/19/2025, 1:26 PM'. At the bottom right, there is a blue 'Exit' button.

Creating a new client enrollment

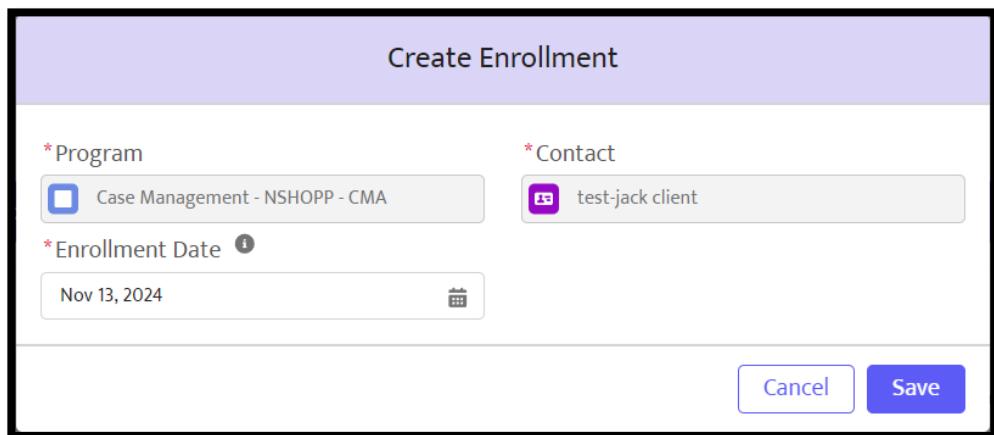
Step 1: Select **New** in the **Enrollments** section and the **Create Enrollment** pop-up will appear. The form will be pre-populated with the program and client's name. These fields are greyed out and cannot be edited.



The screenshot shows the VIVE software interface with a purple navigation bar at the top. The 'Enrollments' section is highlighted. A red box surrounds the 'New' button in the top right corner of the enrollment list area.

Step 2: You may change **Enrollment Date** by selecting the calendar icon or typing in the date. Enrollment can be set to a past date but not a future one.

Step 3: Confirm all information is correct before selecting **Save** and you will be directed to the **Enrollment Details** section.



The screenshot shows the 'Create Enrollment' pop-up window. It includes fields for 'Program' (Case Management - NSHOPP - CMA), 'Contact' (test-jack client), and 'Enrollment Date' (Nov 13, 2024). The 'Save' button is highlighted with a blue box.

The enrollment page for the newly enrolled client will now be displayed. An overview of the enrollment will be available in the **Enrollment Details** section when selected.

For some programs, the **Enrollment Status** field for newly registered clients will display **In Review** until the enrollment has been approved. Once approved, this status will change to **Active**. For other programs, newly enrolled clients will automatically receive an **Enrollment Status** of **Active**.

NOTE: For clients who are entirely new to VIVÉ and do not have a client profile, first complete the steps for entering a new client. (For more information on [Client Search](#) and [Client Profile](#))

Enrollment Status In Review

Enrollment
Case Management - NSHOPP - CMA

Contact: test-Jack.client Assigned To:

Assign Worker Approve Reject

Enrollment Details Contacts Forms Assessments Documents Event Signup Unit Entry Follow up More

Enrollment Information

Enrollment Name: Case Management - NSHOPP - CMA

Enrollment Status: In Review

Enrollment Date: 11/13/2024

Program: Case Management - NSHOPP - CMA

Referral Information

Linked Referral

Referring Agency Name

Referring Worker Name

On Hold Details

On Hold Start Date

On Hold End Date

On Hold Comments

Enrollment Closing Details

Closing Date

Closing Code

Closing Reason

System Information

Created By: Karyn Velez

Last Modified By: Karyn Velez

Created Date: 11/13/2024, 11:12 AM

Last Modified Date: 11/13/2024, 11:12 AM

Exit

Enrollment Details Menu

The **Enrollment Details Menu** provides access to a series of database features that provide programs with opportunities to input various data elements for clients. Some of these features are common to all programs who enroll clients in VIVÉ, while others have associations with only specific programs. These features are displayed on the menu bar as either a tab or as a pick on the **More** dropdown menu.

Common features include:

- [Enrollment Details](#) – Provides an overview of the client's enrollment details.
- [Contacts](#) – Add contacts to the client's file on VIVÉ.
- [Documents](#) – Upload certain client documents into VIVÉ.
- [Unit Entry](#) – Enter a client specific unit of service on VIVÉ.
- [Follow-Up](#) – Assign or be assigned actions to be completed on the client's behalf in VIVÉ.
- Status History – A historical record of the enrollment status of the client in VIVÉ.

Program specific features include:

- **Forms** – Access to forms specific to each program type such as intakes, task list screenings, service plans or the NSI.
- **Assessments** – Access to program specific assessment forms, such as PHQ-9, Assistive Devices, etc.
- [Event Sign-Up](#) – Sign clients up for program specific events such as support groups, supplemental services, and/or educational activities.
- [Case Notes](#) – Create and record case notes associated with services provided for the client.
- **Service Plans: Meal Delivery, Home Care, and Friendly Visiting** – Create and manage various services and delivery plans that a program can authorize for a client's care plan.
- **Cost Share** – Staff in **Case Management** programs can calculate the payment amount for a client's home care services based on the client's finances.
- **Waitlist** – Staff in **Case Management** programs can manage clients who are waiting for certain authorized services.
- **Match Status** – Staff in **Friendly Visiting** programs can match a client with a **Friendly Visiting** volunteer.

Enrollment: Additional Features

There are five additional features that are available to programs on the **Enrollment** level: **Approve**, **Reject**, **Assign Workers**, **On Hold** and **Closing Enrollment**. The display and use of these features will depend on your program type. Please see the chart below for more information on which features are available for your program type. How to navigate each of these features – **Approve**, **Reject**, **Assign Workers**, **On Hold** and **Closing Enrollment** – then follows.

Program Type	Approve	Reject	Assign Workers	On Hold	Closing Enrollment
Caregiver			✓	✓	✓
Case Management	✓	✓	✓		✓
Elderly Crime Victims			✓	✓	✓
Foster Grandparents			✓	✓	✓
HIICAP			✓	✓	✓
Nutrition			✓	✓	✓
Senior Employment			✓	✓	✓
TESS			✓	✓	✓
Volunteer Resource			✓	✓	✓
Elder Justice			✓	✓	✓
Friendly Visiting			✓	✓	✓
Geriatric Mental Health			✓	✓	✓
Home Care			✓	✓	✓
Legal			✓	✓	✓
NORC			✓	✓	✓
Social Adult Day			✓	✓	✓
Transportation			✓	✓	✓

Approve a Client Enrollment

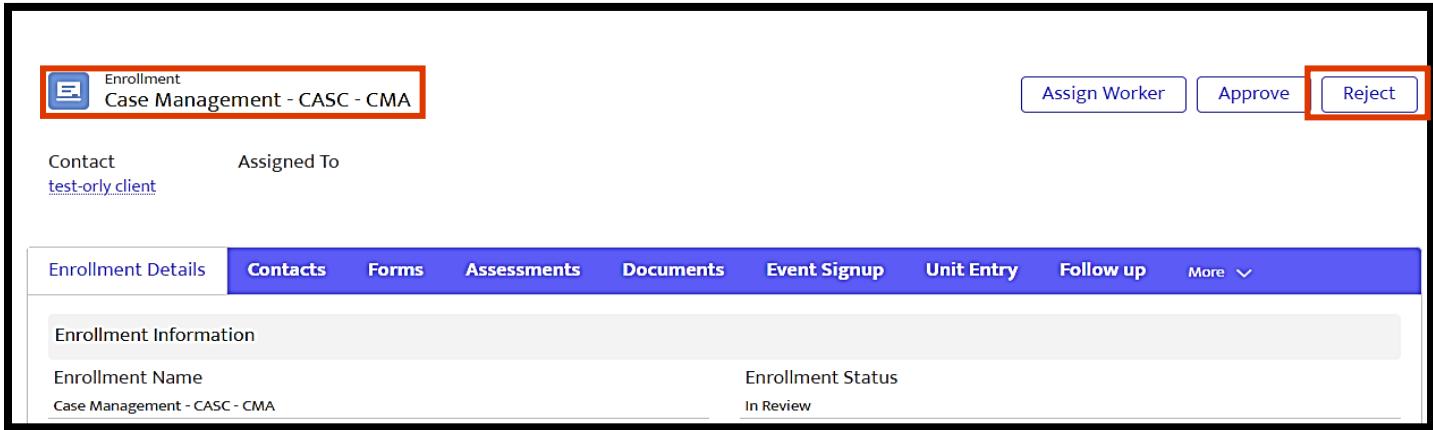
Programs who must **Approve** clients before the status of their enrollment can be updated from **In Review** to **Active** will see the **Approve** button displayed on the **Enrollment** screen. Once the **Approve** button is selected, a notification of successful activation will display. (See below)



The **Approve** and **Reject** buttons from the **Enrollment Details** screen are replaced with a **Closing Enrollment** button. The status of the client's enrollment updates to **Active**.

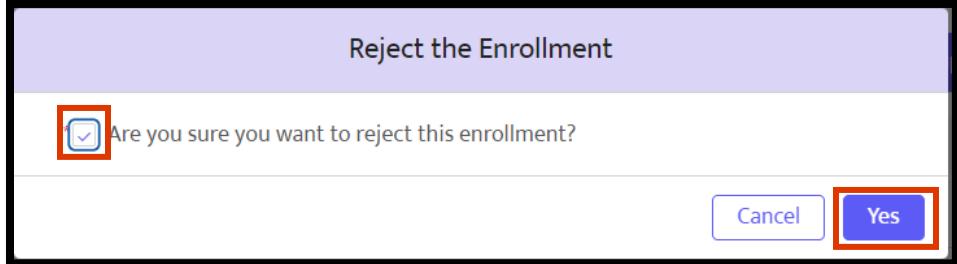
Reject Client Enrollment

Step 1: If a client's **Enrollment Status** is **In Review** and the program does not wish to enroll the client into their program, select the **Reject** button.



The screenshot shows the 'Enrollment Details' page. At the top, there is a header with a logo and the text 'Enrollment Case Management - CASC - CMA'. To the right of the header are three buttons: 'Assign Worker', 'Approve', and 'Reject', with 'Reject' highlighted by a red box. Below the header, there are sections for 'Contact' (labeled 'test-only client') and 'Assigned To'. A navigation bar below these sections includes tabs for 'Enrollment Details', 'Contacts', 'Forms', 'Assessments', 'Documents', 'Event Signup', 'Unit Entry', 'Follow up', and 'More'. Under the 'Enrollment Details' tab, there is a sub-section titled 'Enrollment Information' containing fields for 'Enrollment Name' (labeled 'Case Management - CASC - CMA') and 'Enrollment Status' (labeled 'In Review').

Step 2: The **Reject** the **Enrollment** pop-up will display. You will be prompted to select the checkbox to confirm the rejection. Check the box marked, "Are you sure you want to reject this enrollment?"



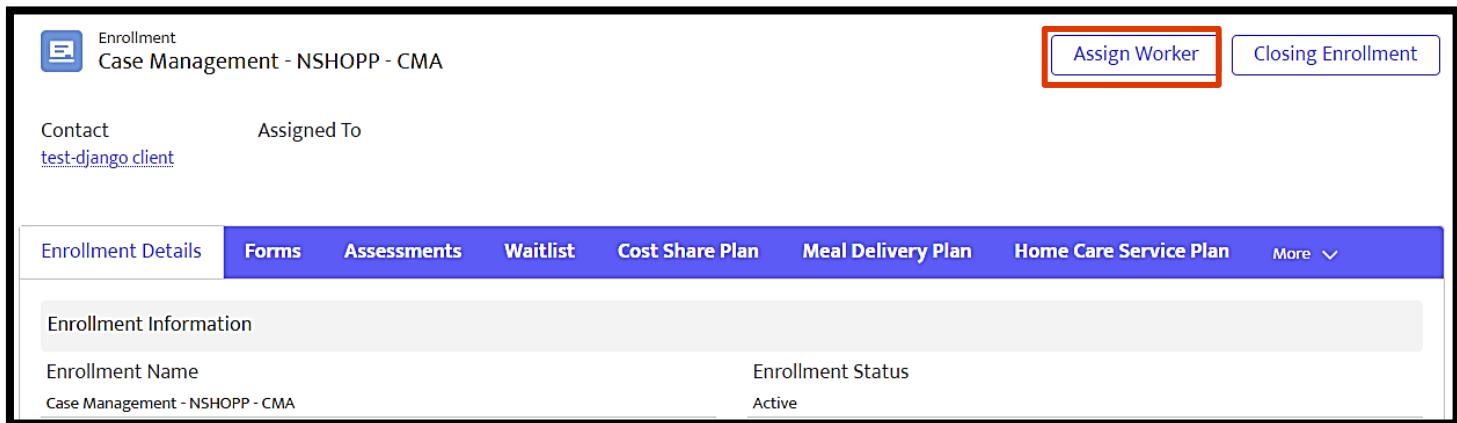
Step 3: Select **Yes**. The **Enrollment Status** will be set to **Inactive** on the **Enrollment Details** page.

NOTE: If the **Reject** button is selected, the client's enrollment will be **Inactivated**. To "reactivate" the client's enrollment, a new **Enrollment** will need to be created.

Assign Worker

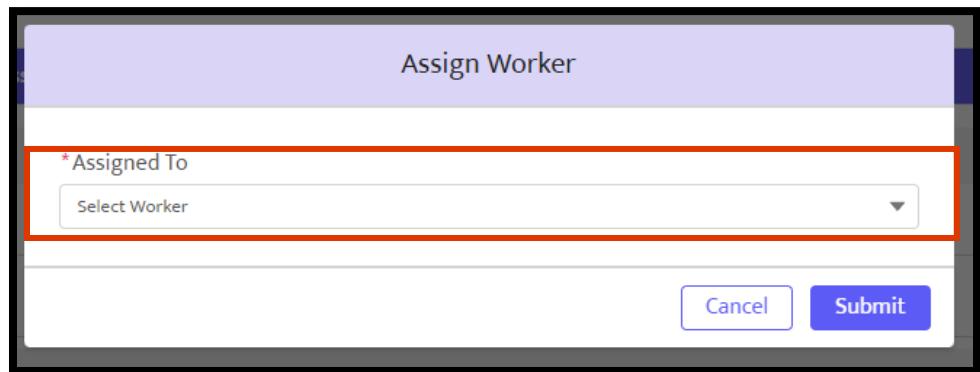
On the **Enrollment Details** screen, the **Assigned To** field will be left blank until a worker is assigned to the client enrollment.

Step 1: Select the **Assign Worker** button. The **Assign Worker** window will pop-up displaying an **Assigned To** dropdown list of all workers associated with the program.



The screenshot shows the 'Enrollment Details' screen. At the top, there is a header with a logo, the text 'Enrollment Case Management - NSHOPP - CMA', and two buttons: 'Assign Worker' (highlighted with a red box) and 'Closing Enrollment'. Below the header, there are two columns: 'Contact' (with 'test-django client' listed) and 'Assigned To'. A navigation bar below these columns includes tabs for 'Enrollment Details', 'Forms', 'Assessments', 'Waitlist', 'Cost Share Plan', 'Meal Delivery Plan', 'Home Care Service Plan', and 'More'. Under the 'Enrollment Details' tab, there is a section for 'Enrollment Information' with fields for 'Enrollment Name' (Case Management - NSHOPP - CMA) and 'Enrollment Status' (Active).

Step 2: Pick the worker's name who will be assigned to the client and select **Submit**. The worker's name will be added to the **Enrollment** screen's **Assigned To** field. A user can also view their assigned enrollment(s) through the **Dashboard** in the **My Enrollments** section.

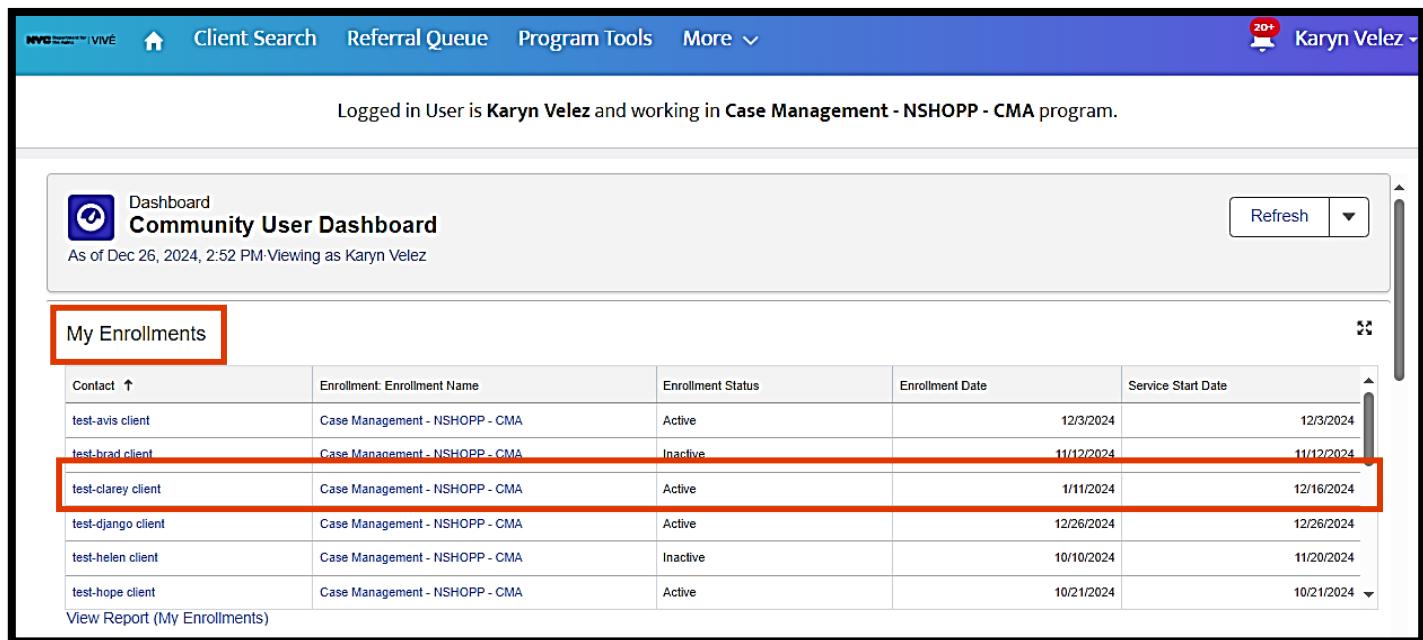


The screenshot shows a 'Assign Worker' pop-up window. The title is 'Assign Worker'. It has a field labeled '* Assigned To' with a dropdown menu labeled 'Select Worker' (highlighted with a red box). At the bottom right are 'Cancel' and 'Submit' buttons.

My Enrollments in Dashboard

Enrollments assigned to a user are listed on the **Dashboard** to streamline access. The client's name, which program enrolled them, the enrollment status, the enrollment date as well as the service start date are listed.

VIVÉ Knowledge Base – Enrollments



Logged in User is Karyn Velez and working in Case Management - NSHOPP - CMA program.

Dashboard
Community User Dashboard
As of Dec 26, 2024, 2:52 PM Viewing as Karyn Velez

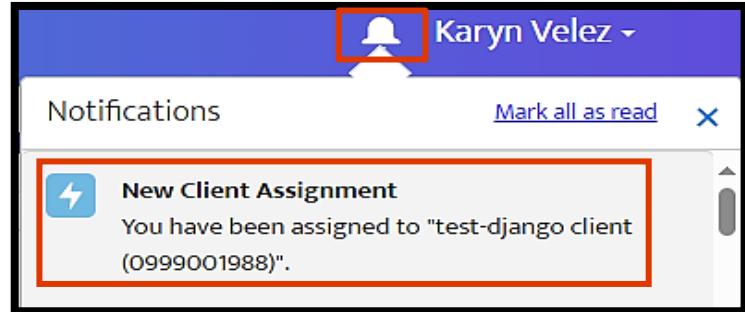
My Enrollments

Contact ↑	Enrollment: Enrollment Name	Enrollment Status	Enrollment Date	Service Start Date
test-avis client	Case Management - NSHOPP - CMA	Active	12/3/2024	12/3/2024
test-brad client	Case Management - NSHOPP - CMA	Inactive	11/12/2024	11/12/2024
test-clarey client	Case Management - NSHOPP - CMA	Active	1/11/2024	12/16/2024
test-django client	Case Management - NSHOPP - CMA	Active	12/26/2024	12/26/2024
test-helen client	Case Management - NSHOPP - CMA	Inactive	10/10/2024	11/20/2024
test-hope client	Case Management - NSHOPP - CMA	Active	10/21/2024	10/21/2024

[View Report \(My Enrollments\)](#)

In addition, a notification prompt regarding the recently assigned Enrollment will display in Notifications. To view this request, select the Bell Icon.

(For more information on [Dashboard](#))



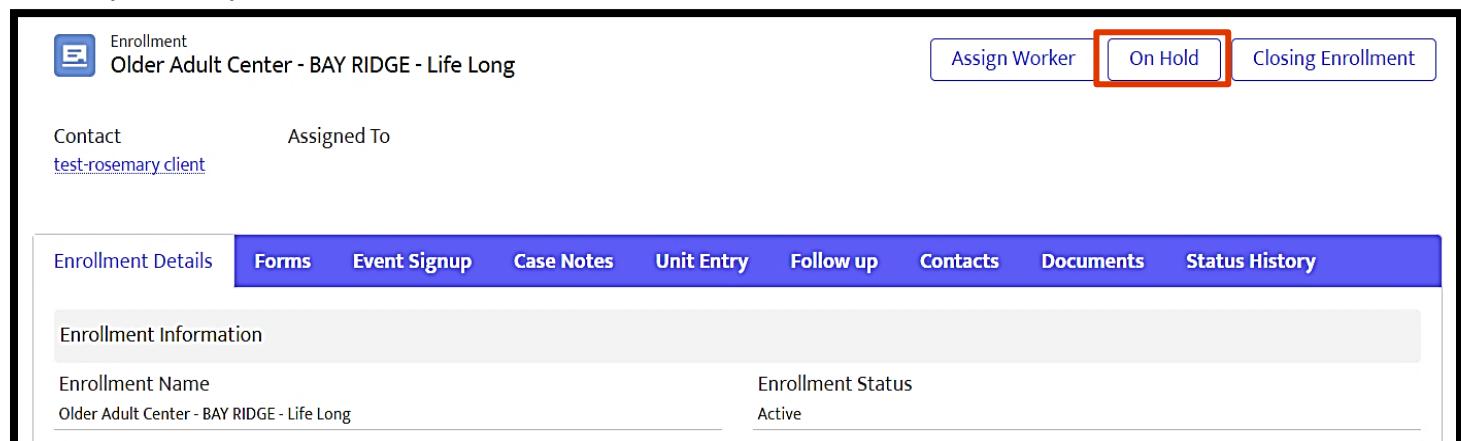
Karyn Velez -

Notifications [Mark all as read](#) [X](#)

New Client Assignment
You have been assigned to "test-django client (0999001988)".

Place an Enrollment On Hold

On the **Enrollment Details** screen, the **On Hold** button places an active client's enrollment **On Hold** for a specified period.



Enrollment
Older Adult Center - BAY RIDGE - Life Long

Contact [test-rosemary client](#) Assigned To

On Hold

[Assign Worker](#) [On Hold](#) [Closing Enrollment](#)

Enrollment Details [Forms](#) [Event Signup](#) [Case Notes](#) [Unit Entry](#) [Follow up](#) [Contacts](#) [Documents](#) [Status History](#)

Enrollment Information

Enrollment Name Older Adult Center - BAY RIDGE - Life Long	Enrollment Status Active
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Step 1: Select the **On Hold** button. The **On Hold Enrollment** pop-up will display.

VIVÉ Knowledge Base – Enrollments

Step 2: Complete the required fields and select the **Save** button. A notification that the **Enrollment** has been scheduled to be placed on hold successfully will display. On the **Enrollment** screen, the dates for the **On Hold** will also appear at the top of the screen. Note that the **Enrollment** itself will remain **Active** during this **On Hold** period.

Fill in all required fields in the **On Hold Enrollment** form. Fields with a red asterisk (*) are required. Select **Save**.

If the **On Hold** request requires editing, select the **Edit On Hold** button from the **Enrollment Details Menu** and make all necessary changes. These changes can be made prior to the start of the **On Hold** date or any time during the scheduled **On Hold** period.

On Hold Enrollment

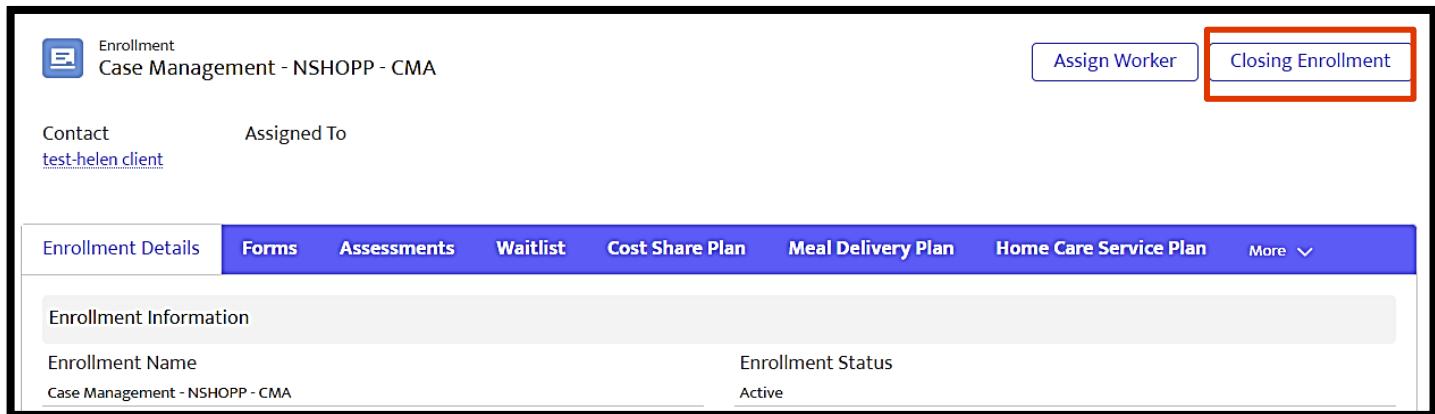
* On Hold Start Date Dec 18, 2024	* On Hold End Date Dec 27, 2024
* On Hold Comments Visiting family in Montana	
Cancel Save	

This Enrollment is scheduled to be On Hold from 12/18/2024 to 12/27/2024

Enrollment Older Adult Center - BAY RIDGE - Life Long	Assign Worker	Edit On Hold	Closing Enrollment
Contact test-rosemary client	Assigned To		
Enrollment Details Forms Event Signup Case Notes Unit Entry Follow up Contacts Documents Status History			
Enrollment Information		Enrollment Status Active	
Enrollment Name Older Adult Center - BAY RIDGE - Life Long			

Closing Enrollment

On the **Enrollment** screen, the **Closing Enrollment** button is available to close a client's record in your specific program.



Enrollment
Case Management - NSHOPP - CMA

Contact: test-helen client Assigned To:

Enrollment Details Forms Assessments Waitlist Cost Share Plan Meal Delivery Plan Home Care Service Plan More ▾

Enrollment Information

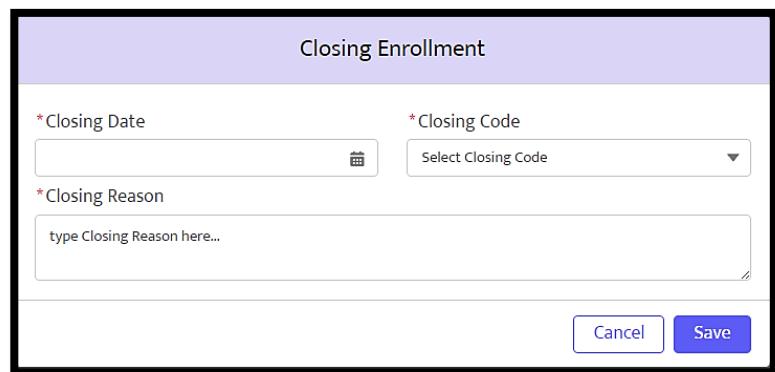
Enrollment Name: Case Management - NSHOPP - CMA Enrollment Status: Active

NOTE: Closing an enrollment only closes the client's enrollment status with your program and does not close the client's enrollment for any other NYC Aging programs. The client's case remains **Active** at the **Client Profile** level until the **Inactivate Client Profile** process has been completed. This process closes the client's file for all NYC Aging programs they are associated with, and the client then becomes "inactive" in the system. Careful to not deactivate a client, because that client maybe enrolled in other programs. (For more information on [Client Profile](#))

Recording an **Enrollment** closure is not bound by whether the closure date has passed, or if the closure has been scheduled for the future. Let us look at the process for both.

Closing an Enrollment: Past date

Step 1: Select the **Closing Enrollment** button. The **Closing Enrollment** pop-up will appear with the required fields **Closing Date**, **Closing Code** and **Closing Reason**.



Closing Enrollment

* Closing Date * Closing Code

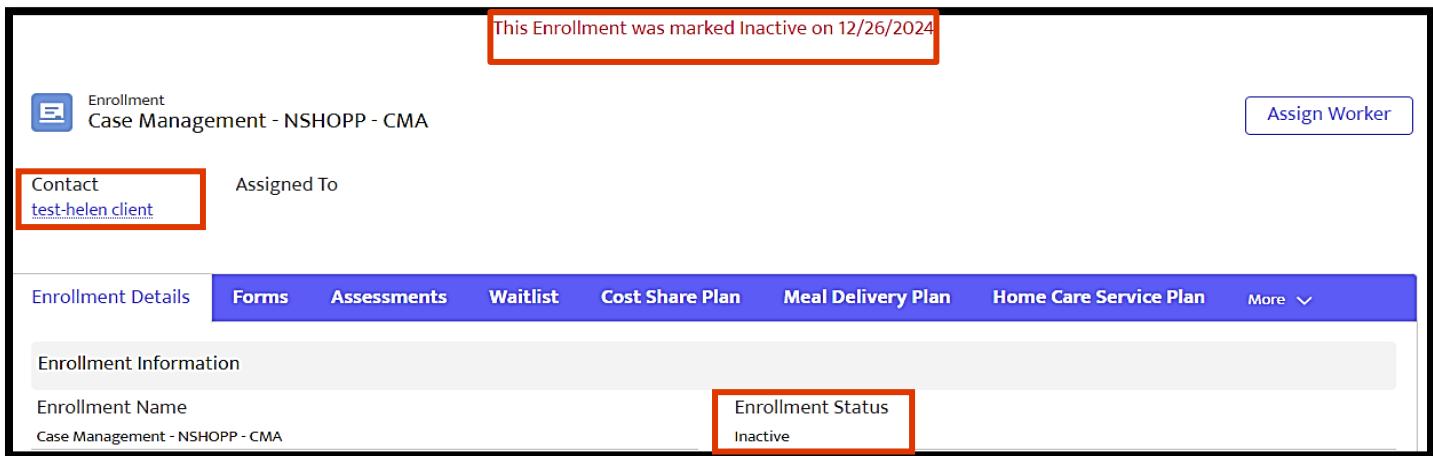
* Closing Reason
type Closing Reason here...

Cancel Save

Step 2: The **Closing Date** field can be completed either by choosing a date from the calendar icon or by typing in the date. The **Closing Code** field provides a dropdown list of possible categories associated with why an enrollment needs to be closed. The **Closing Reason** field is a comment box that provides for a more detailed reason about the closure. Once all fields are updated select the **Save** button.

The system will return to the **Enrollment** screen where a notification will display the **Inactive** status of the **Enrollment** at the top of the page. This **Inactive** status will also be noted under the **Enrollment Status** heading on the **Enrollment Details** page. (See below)

VIVÉ Knowledge Base – Enrollments



This Enrollment was marked Inactive on 12/26/2024

Enrollment
Case Management - NSHOPP - CMA

Contact [test-helen client](#) Assigned To

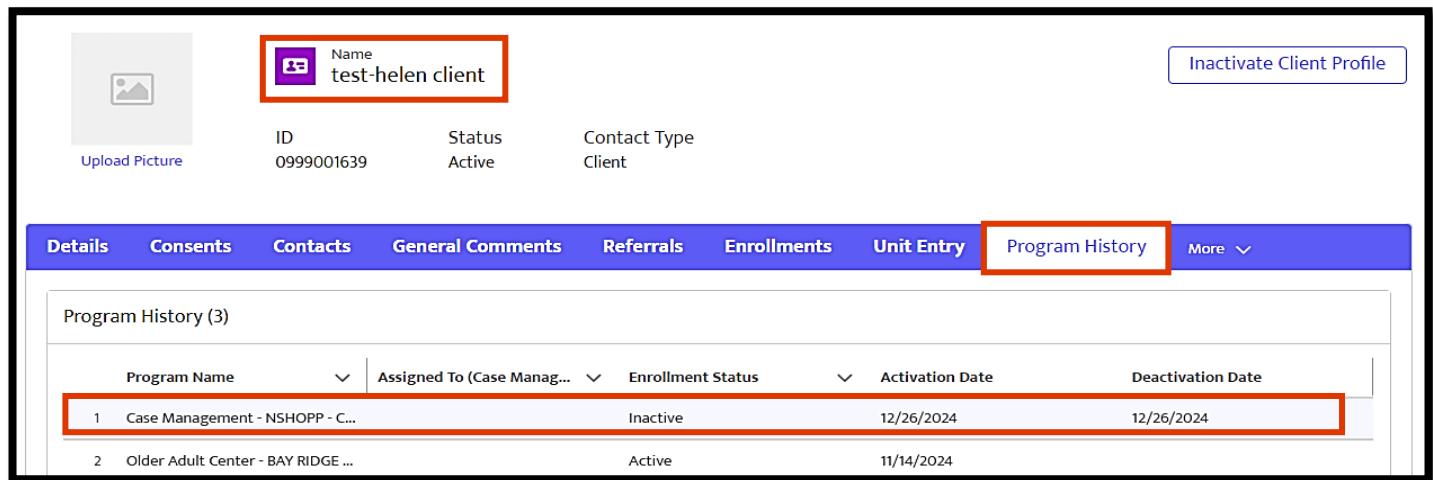
Enrollment Details Forms Assessments Waitlist Cost Share Plan Meal Delivery Plan Home Care Service Plan More

Enrollment Information

Enrollment Name: Case Management - NSHOPP - CMA

Enrollment Status: Inactive

The status of an enrollment can be viewed on the list located in **Program History** on the **Client Details** section.



Name: test-helen client

Upload Picture

ID: 0999001639 Status: Active Contact Type: Client

Inactivate Client Profile

Details Consents Contacts General Comments Referrals Enrollments Unit Entry Program History More

Program History (3)

Program Name	Assigned To (Case Manag...)	Enrollment Status	Activation Date	Deactivation Date
1 Case Management - NSHOPP - C...		Inactive	12/26/2024	12/26/2024
2 Older Adult Center - BAY RIDGE ...		Active	11/14/2024	

NOTE: To protect client confidentiality, there are four programs that will never display the client's enrollment status on Program History. These programs are Elder Justice, Geriatric Mental Health, Elderly Crime Victims Center and Legal Services.

Closing Enrollment: Future Date

Similar to the process of **Closing an Enrollment** for a past date, an enrollment can be closed with a future date. Once closed, the **Enrollment Details** page will display a message with the date and reason for the closure. The **Enrollment Status** will remain active until the scheduled closing date occurs.

VIVÉ Knowledge Base – Enrollments

On the date that the enrollment is scheduled to close, a message located on the top of the client's profile will appear confirming the status has been changed to **Inactive**. This updated status will also be noted under **Enrollment Status**.

This Enrollment is scheduled to be closed on 1/6/2025 with the reason Moving to live with daughter in Queens.

 Enrollment
Case Management - NSHOPP - CMA

Contact [test-joy.client](#) Assigned To Karyn Velez

[Assign Worker](#) [Edit Enrollment Closure](#)

[Enrollment Details](#) [Forms](#) [Assessments](#) [Waitlist](#) [Cost Share Plan](#) [Meal Delivery Plan](#) [Home Care Service Plan](#) [More](#)

Enrollment Information

Enrollment Name Case Management - NSHOPP - CMA	Enrollment Status Active
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NOTE: On the **Program History List View**, the **Enrollment Status** for the client will also remain **Active** until the closure date occurs.

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

- [VIVÉ Knowledge Base](#) contains reference guides, short videos and recorded trainings.
- 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](#)