

## The VIVÉ Enrollments Reference Guide

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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

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**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

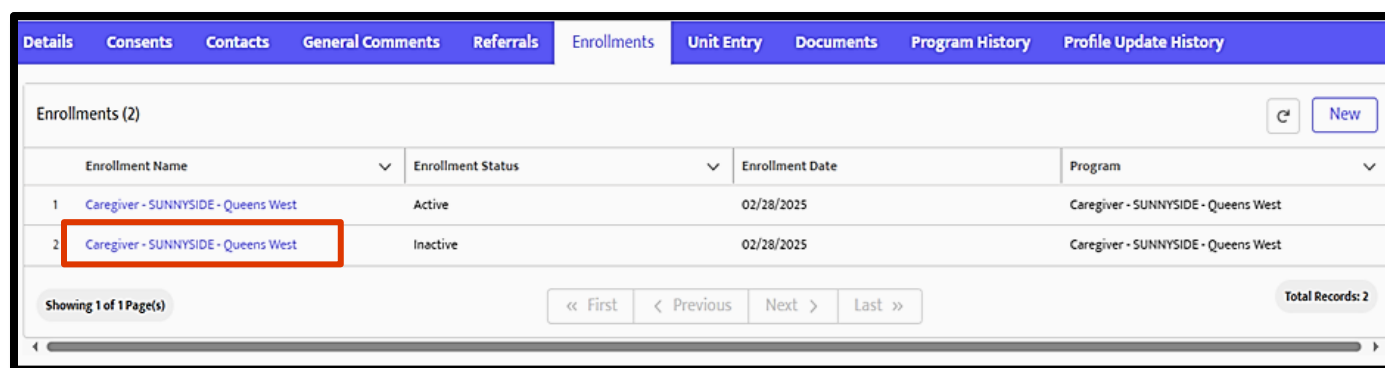
The **Enrollment** menu contains various tabs providing access to capture information about the client and track the work done on their behalf. The default tab on the menu bar will be **Enrollment Details**. Depending on the program type, the status of an enrollment will either default to **Active**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



Details Consents Contacts General Comments Referrals Enrollments Unit Entry Documents Program History Profile Update History				
Enrollments (2)				<a href="#">New</a>
Enrollment Name	Enrollment Status	Enrollment Date	Program	
1 <a href="#">Caregiver - SUNNYSIDE - Queens West</a>	Active	02/28/2025	Caregiver - SUNNYSIDE - Queens West	
2 <a href="#">Caregiver - SUNNYSIDE - Queens West</a>	Inactive	02/28/2025	Caregiver - SUNNYSIDE - Queens West	
Showing 1 of 1 Page(s)		<a href="#">« First</a> <a href="#">&lt; Previous</a> <a href="#">Next &gt;</a> <a href="#">Last »</a>		Total Records: 2

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.

**Enrollment**  
**Older Adult Center - BAY RIDGE - Life Long**

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

Contact

Assigned To

[test-joe client](#)

Karyn Velez

[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

## 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.

**Enrollment**  
**Caregiver - SUNNYSIDE - Queens West**

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

Contact

Assigned To

[Maybel Mayweather](#)

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

Enrollment Information

Enrollment Name

Caregiver - SUNNYSIDE - Queens West

Enrollment Status

Active

Enrollment Date

2/19/2025

Program

Caregiver - SUNNYSIDE - Queens West

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

Jamie L Foronda

Last Modified By

Jamie L Foronda

Created Date

2/19/2025, 1:26 PM

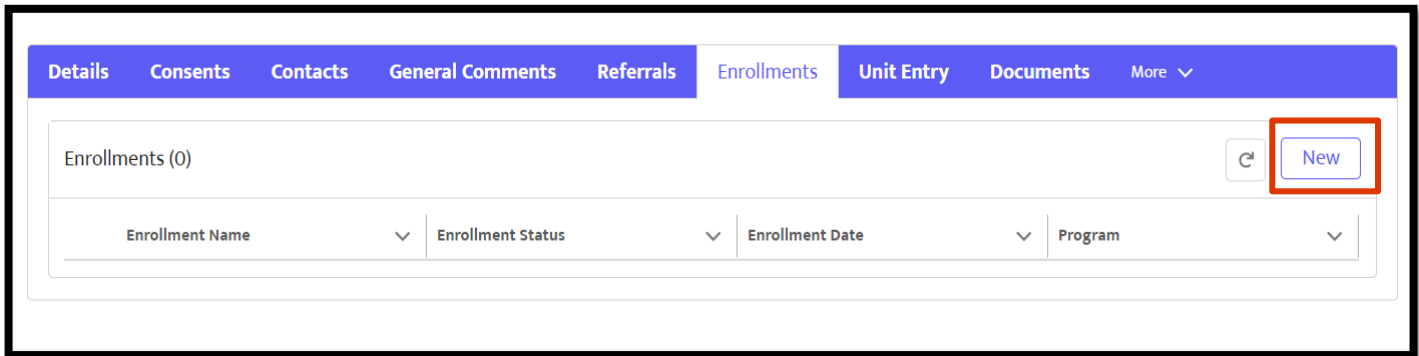
Last Modified Date

2/19/2025, 1:26 PM

[Exit](#)

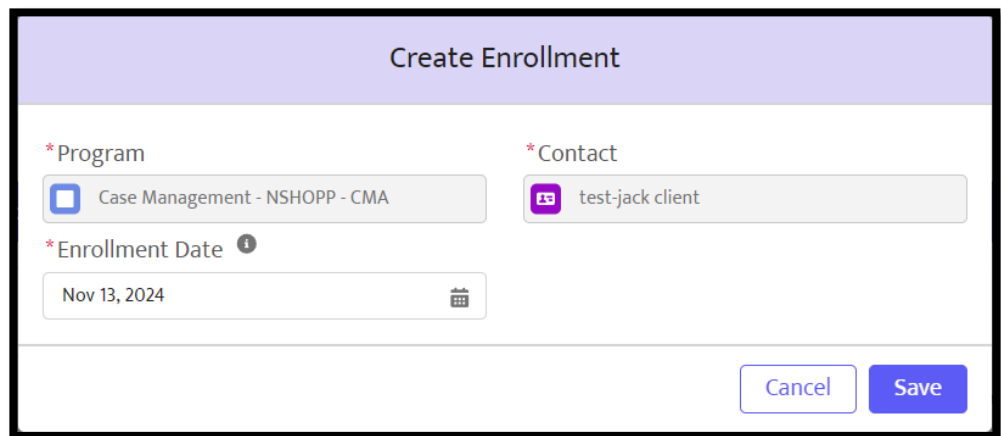
## Creating a new client enrollment

**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.



**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 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 Worker Name

Referring Agency Name

On Hold Details

On Hold Start Date  
  
On Hold Comments

On Hold End Date

Enrollment Closing Details

Closing Date  
  
Closing Reason

Closing Code

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.

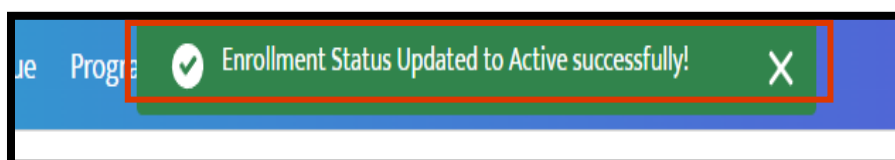
## Enrollment: Additional Features

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

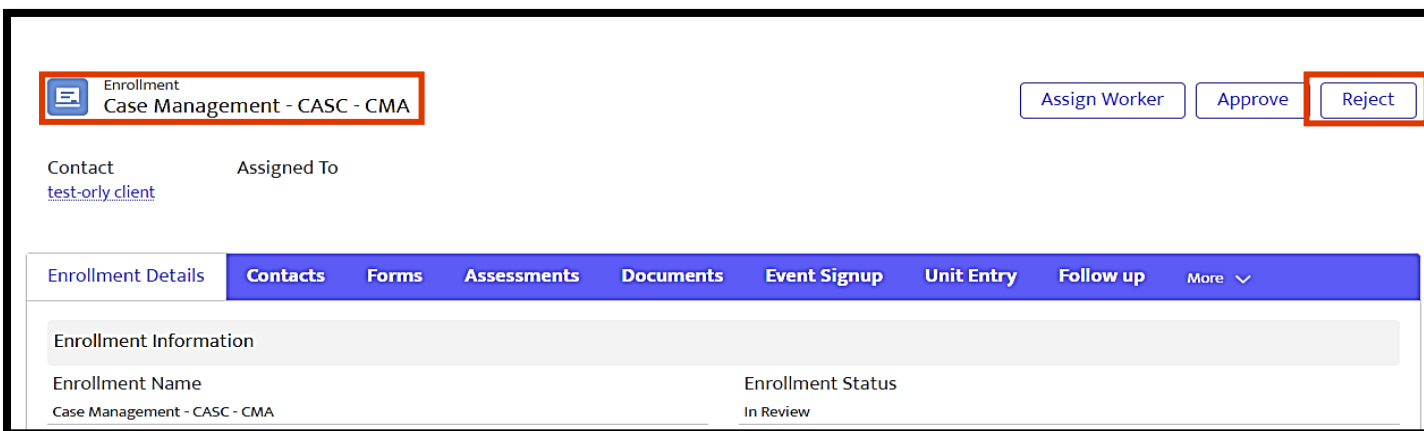
Programs who must **Approve** clients before the status of their enrollment can be updated from **In Review** to **Active** will see the **Approve** button displayed on the **Enrollment** screen. Once the **Approve** button is selected, a notification of successful activation will display. (See *below*)



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**.

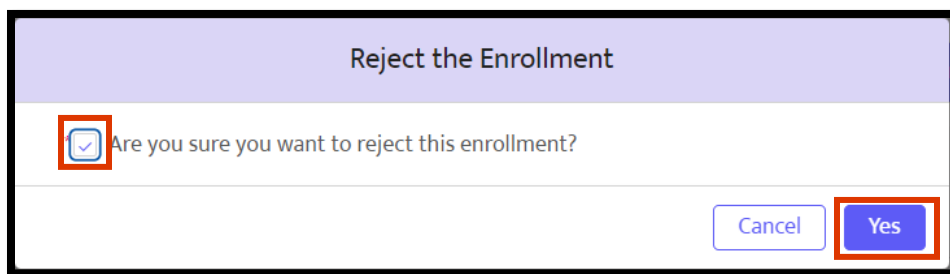
## Reject Client Enrollment

**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 Management - CASC - CMA' interface. At the top, there are buttons for 'Assign Worker', 'Approve', and 'Reject', with the 'Reject' button highlighted by a red box. Below these buttons, the 'Contact' is listed as 'test-only client' and 'Assigned To' is blank. A navigation bar includes 'Enrollment Details', 'Contacts', 'Forms', 'Assessments', 'Documents', 'Event Signup', 'Unit Entry', 'Follow up', and 'More'. The 'Enrollment Information' section shows 'Enrollment Name' as 'Case Management - CASC - CMA' and 'Enrollment Status' as '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?"



The screenshot shows a 'Reject the Enrollment' pop-up dialog. It contains a checkbox with a checkmark, which is highlighted by a red box, and the text 'Are you sure you want to reject this enrollment?'. At the bottom right, there are 'Cancel' and 'Yes' buttons, with the 'Yes' button highlighted by a red box.

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

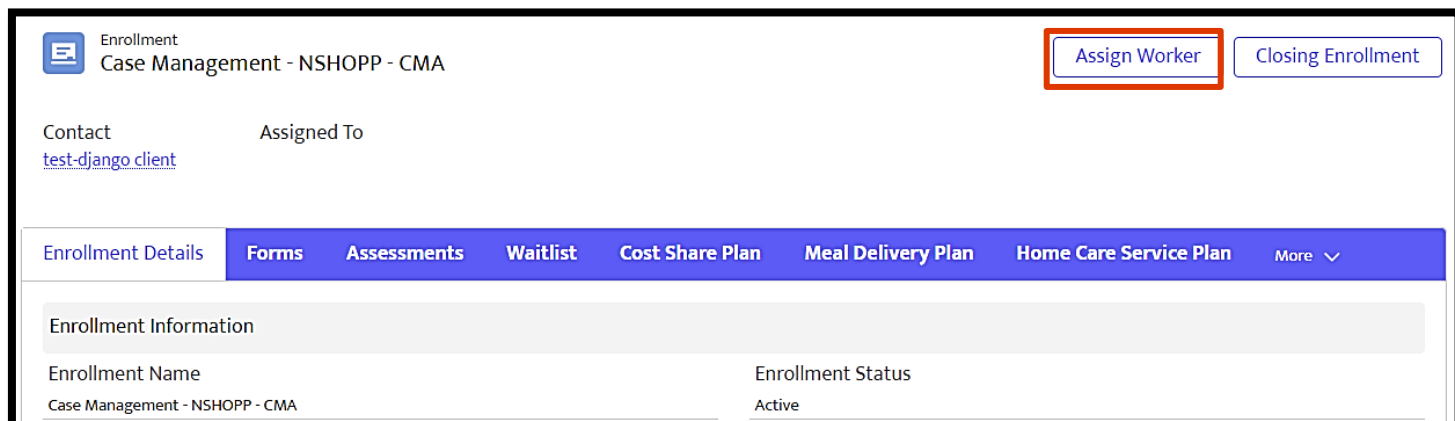
**NOTE:** If the **Reject** button is selected, the client's enrollment will be **Inactivated**. To "reactivate" the client's enrollment, a new **Enrollment** will need to be created.



## Assign Worker

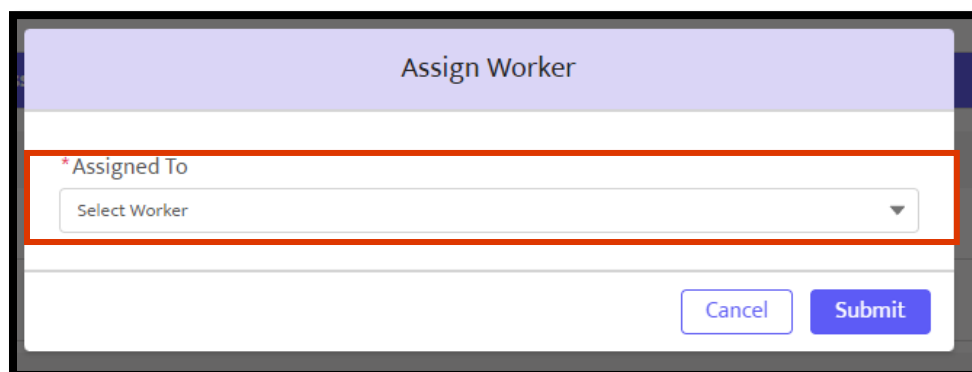
On the **Enrollment Details** screen, the **Assigned To** field will be left blank until a worker is assigned to the client enrollment.

**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 for 'Case Management - NSHOPP - CMA'. At the top right, there are two buttons: 'Assign Worker' (highlighted with a red box) and 'Closing Enrollment'. Below the header, there is a section for 'Contact' with the value 'test-django client' and an 'Assigned To' field which is currently blank. A horizontal menu bar contains several tabs: 'Enrollment Details' (selected), 'Forms', 'Assessments', 'Waitlist', 'Cost Share Plan', 'Meal Delivery Plan', 'Home Care Service Plan', and 'More'. Below the menu, there is a section titled 'Enrollment Information' with two columns: '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 the 'Assign Worker' pop-up window. It has a title bar 'Assign Worker'. Below the title bar, there is a section labeled '\* Assigned To' with a dropdown menu that currently shows 'Select Worker'. At the bottom right of the window, there are two buttons: 'Cancel' and 'Submit'.

The **Assign Worker** button will continue to be available. If the **Assigned Worker** needs to be changed, repeat the steps.

## 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.

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](#))

Notifications [Mark all as read](#)

**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

Assign Worker **On Hold** Closing Enrollment

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

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

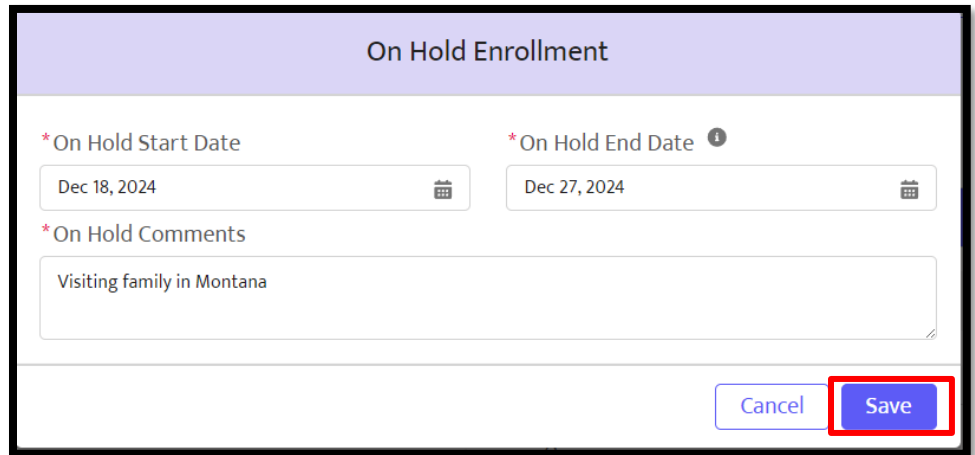
Enrollment Information

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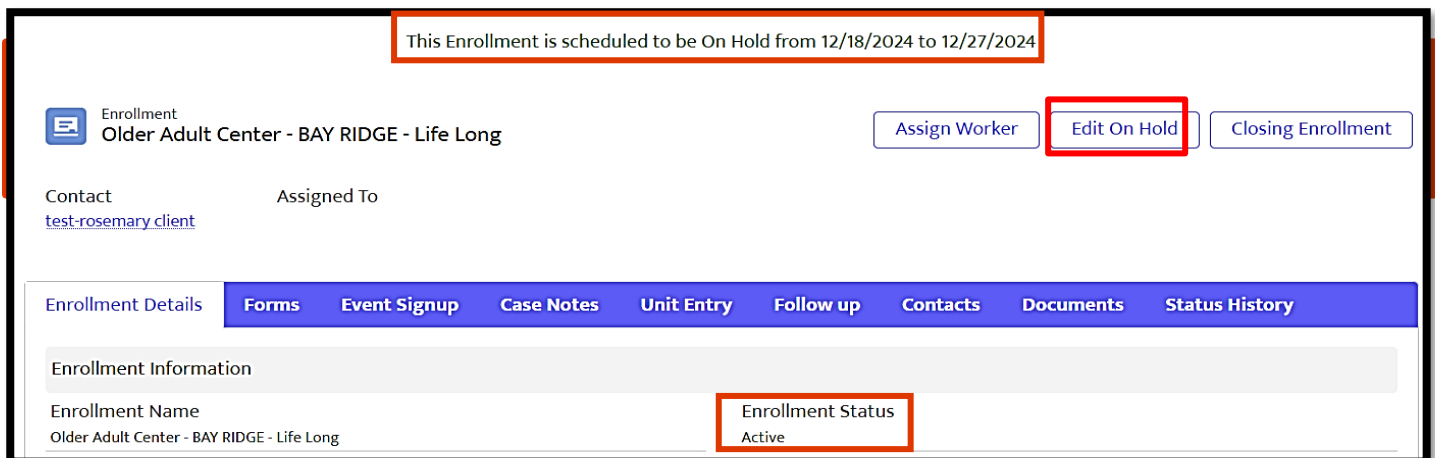
**Step 1:** Select the **On Hold** button. The **On Hold Enrollment** pop-up will display.

**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**.

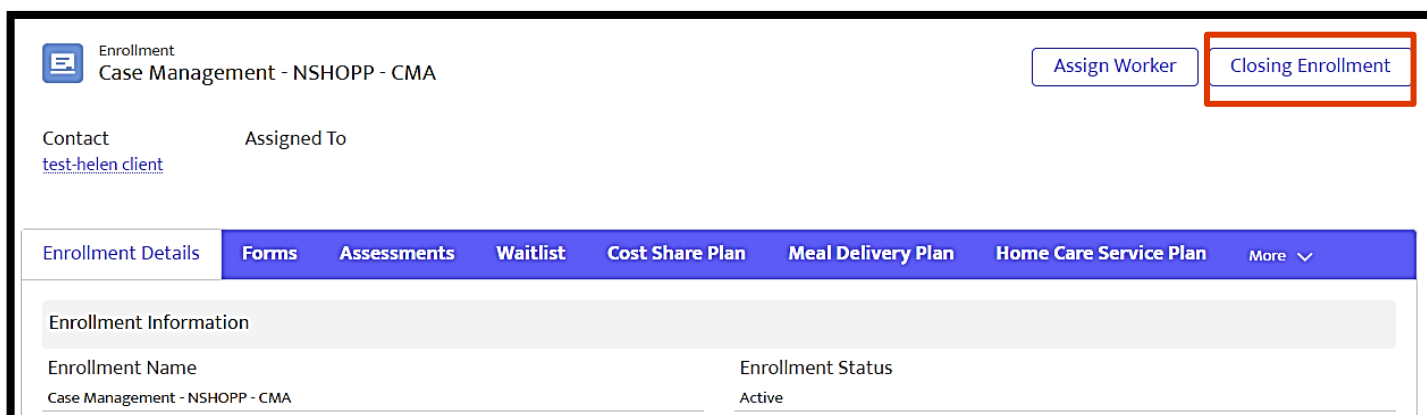
A screenshot of the 'On Hold Enrollment' form. The form has a purple header with the title 'On Hold Enrollment'. Below the header, there are two date fields: '\* On Hold Start Date' with the value 'Dec 18, 2024' and '\* On Hold End Date' with the value 'Dec 27, 2024'. Both fields have a calendar icon. Below these is a text area for '\* On Hold Comments' with the value 'Visiting family in Montana'. At the bottom right, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red border.

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.

A screenshot of the 'Enrollment Details' screen. At the top, a notification bar states 'This Enrollment is scheduled to be On Hold from 12/18/2024 to 12/27/2024'. Below this, the enrollment is identified as 'Older Adult Center - BAY RIDGE - Life Long'. There are three buttons: 'Assign Worker', 'Edit On Hold' (highlighted with a red border), and 'Closing Enrollment'. The 'Contact' is listed as 'test-rosemary client'. Below this is a tabbed menu with 'Enrollment Details' selected. The 'Enrollment Information' section shows 'Enrollment Name' as 'Older Adult Center - BAY RIDGE - Life Long' and 'Enrollment Status' as 'Active' (highlighted with a red border).

## Closing Enrollment

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

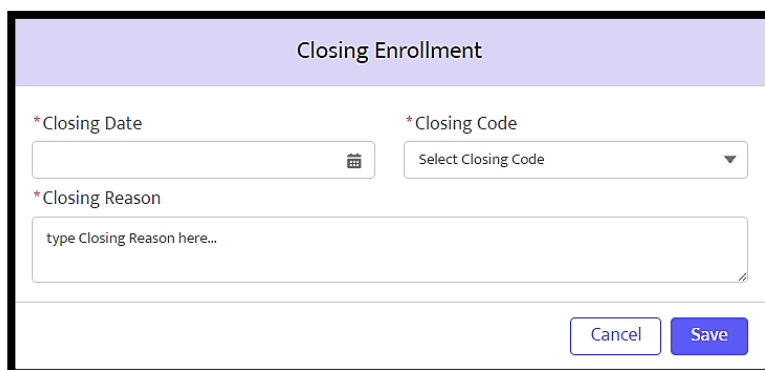


**NOTE:** Closing an enrollment only closes the client's enrollment status with your program and does not close the client's enrollment for any other NYC Aging programs. The client's case remains **Active** at the **Client Profile** level until the **Inactivate Client Profile** process has been completed. 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 inactivate 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**.



**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)

This Enrollment was marked Inactive on 12/26/2024

Enrollment  
Case Management - NSHOPP - CMA

Assign Worker

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.

Upload Picture

Name  
test-helen client

Inactivate Client Profile

ID 0999001639 Status Active Contact Type Client

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**.

The screenshot displays the 'Enrollment' page for 'Case Management - NSHOPP - CMA'. At the top, a red-bordered box contains the message: 'This Enrollment is scheduled to be closed on 1/6/2025 with the reason Moving to live with daughter in Queens.' Below this, the page header includes the enrollment title and two buttons: 'Assign Worker' and 'Edit Enrollment Closure'. The 'Contact' section lists 'test-joy.client' and the 'Assigned To' section lists 'Karyn Velez'. A navigation bar with tabs for 'Enrollment Details', 'Forms', 'Assessments', 'Waitlist', 'Cost Share Plan', 'Meal Delivery Plan', 'Home Care Service Plan', and 'More' is present. Under the 'Enrollment Information' section, the 'Enrollment Name' is 'Case Management - NSHOPP - CMA' and the 'Enrollment Status' is 'Active', with the status field highlighted by a red-bordered box.

**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](#)