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VIVÉ Basic Navigation 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 basic instructions on the use of 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. Or you can use your browser's back button to return to a 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:

- **VIVÉ's Five Levels of Navigation**
  - Top Menu
  - Details Menu
  - Sub-details Menu
  - Enrollment Details Menu
  - Assessment & Forms Menu
- **Overall Tips**
  - List Views
  - Form Views
  - Page Refresh
- **Navigational Links**
- **Data Entry Options**
- **Searching by Filtering & Sorting**

If you have any questions, please contact the **VIVÉ Application Support Center** by submitting a ticket through the **Ticketing Module** under **Program Tools.**

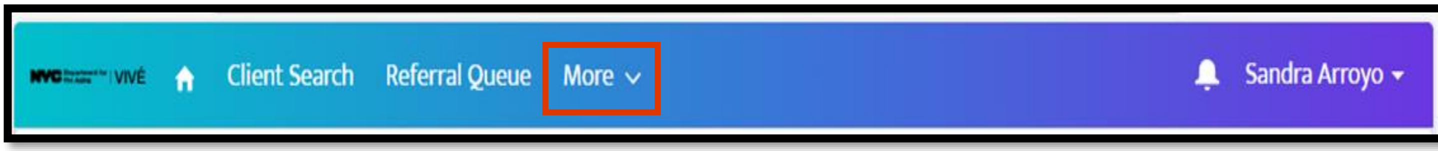
VIVÉ's Five Levels of Navigation

VIVÉ uses horizontal navigation. Clicking on a navigational link reveals the next level of navigation.

Top Menu

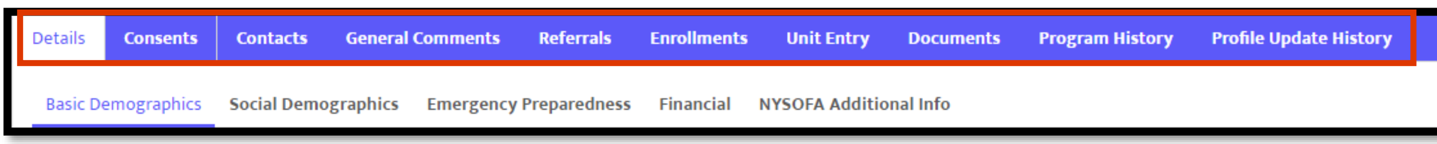
The **Top Menu** is available on every page. It links to overall operational functionality.

VIVÉ uses responsive design. When the width of the browser window gets narrower, a **More** link appears to display any links that don't fit along the top of the narrower window.



Administrators and Home Delivered Meals (HDM) users have different **Top Menus**. (For more information on [Administrator Tools] and [HDM].)

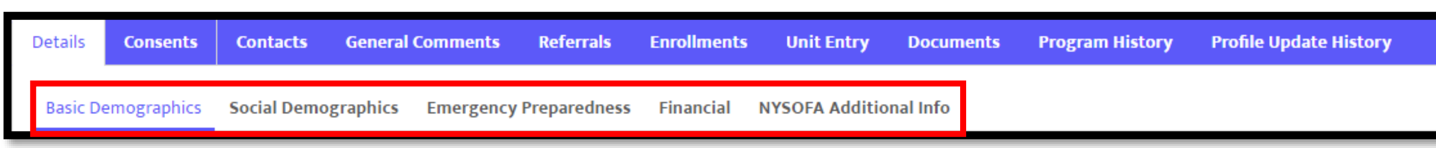
Details Menu



The Details Menu is the destination of any client link. This information is available to any user that has consent to view the client's record.

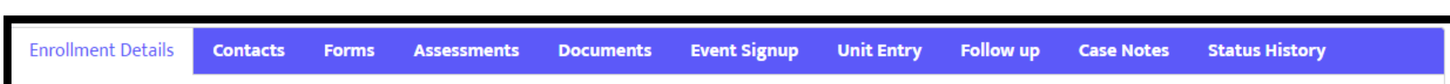
Sub-details Menu

The **Sub-details Menu** is where various client details are entered, viewed, and edited.



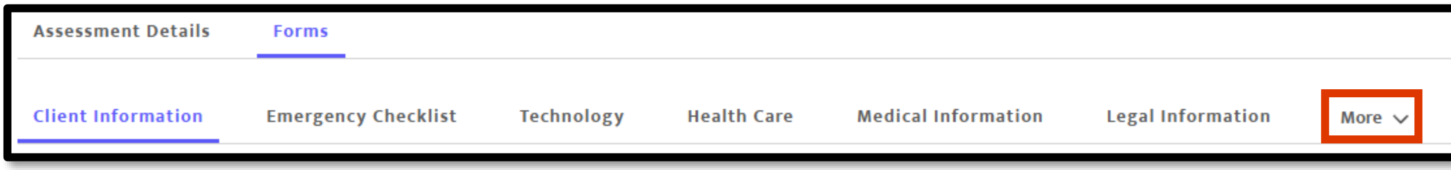
Enrollment Details Menu

The sections within the **Enrollment Details Menu** are program specific information. The tabs displayed on the menu are different per program. For example, there are no **Case Notes** within Home Delivered Meal programs and there are no **Assessments** within the Transportation program.



Assessment & Forms Menu

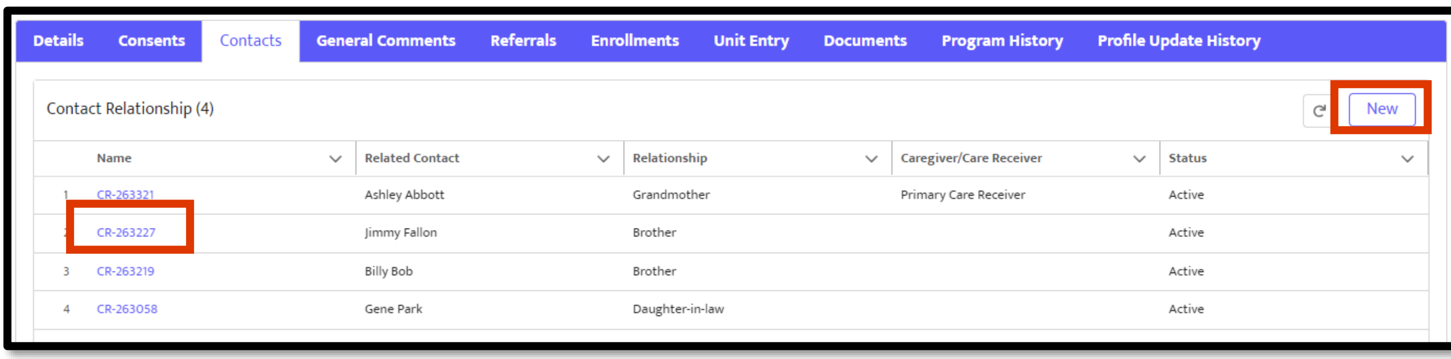
Forms & Assessments Menus are program specific. Refer to your specific program guides for more information.



Overall Tips

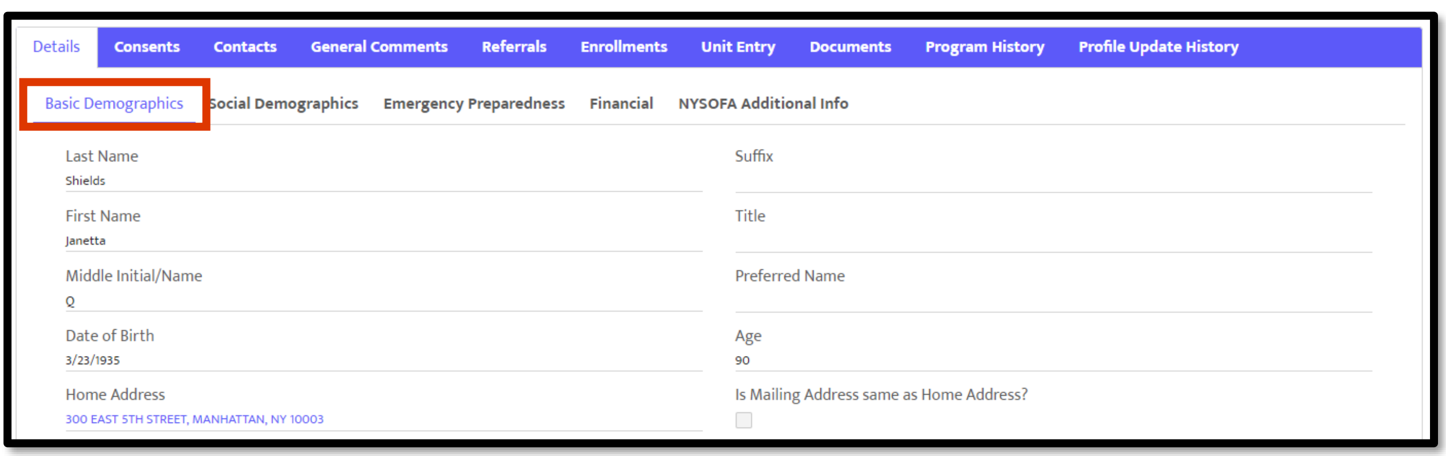
List Views

The list view displays rows of discrete items to select, such as the results from **Client Search** or a list of **Contacts**. Click on the link to access more details.

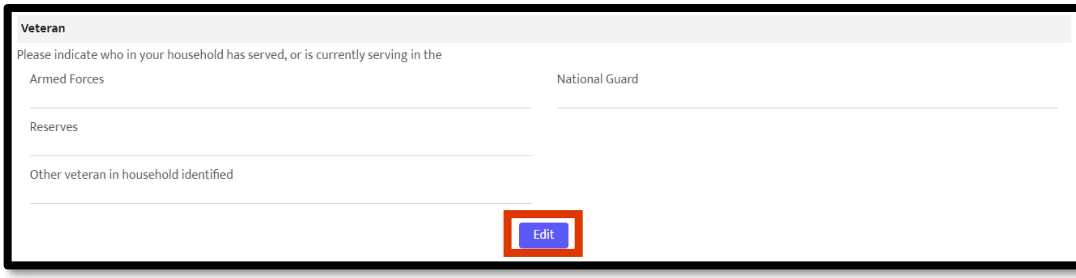


Form Views

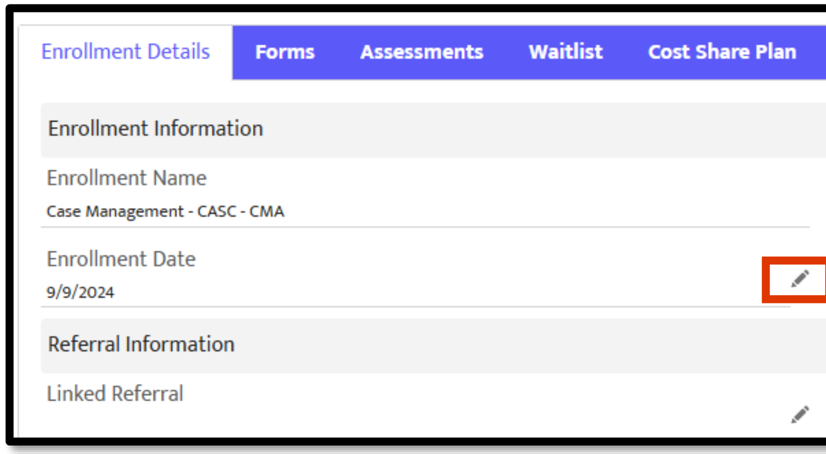
The form view is a single version of client information. This information is the same regardless of which program you are in, such as **Basic Demographics**.



There are two ways to edit information on the form views. The first is via an **Edit** button either at the bottom of the page or in the upper right corner.



The second way to edit information via pencil icons is located to the right of editable fields. Click on the pencil to edit that and any other field on the form.



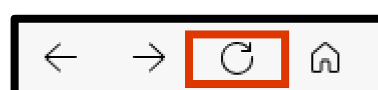
Page Refresh

In some situations, you may need to refresh the page to display the most current information. There are three ways to do this.

First, with the Dashboard's refresh button located on the right-hand side.

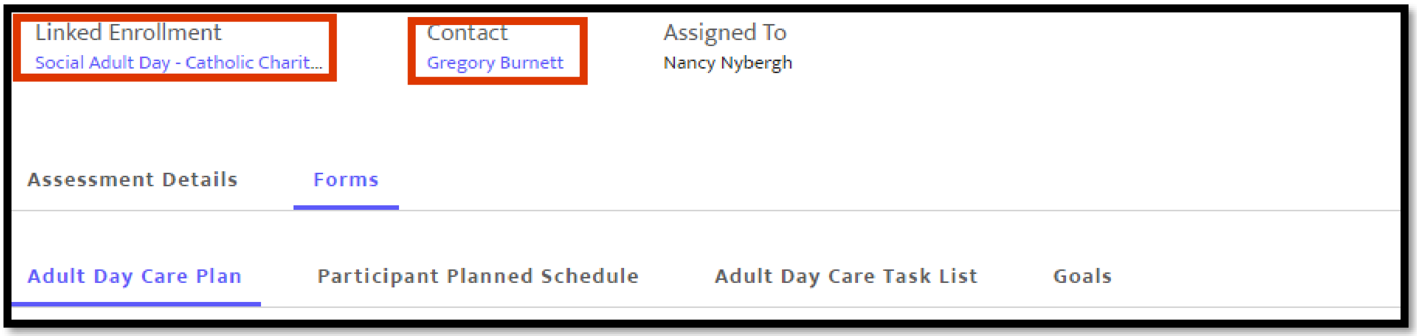
Second is with the refresh icon located on list view forms:

Third is with the browser window's refresh icon. Depicted in the screenshots the refresh button from Microsoft's Edge browser, which is located to the left of the address bar at the top.



Navigational Links

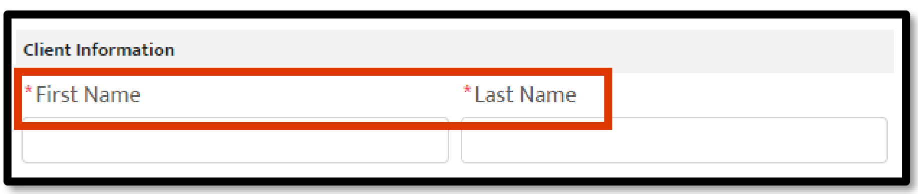
Throughout VIVÉ there are links to either client or enrollment details. The graphic below illustrates the links to additional information about the client's enrollment (Social Adult Day) and to the Client's details.



Data Entry Methods

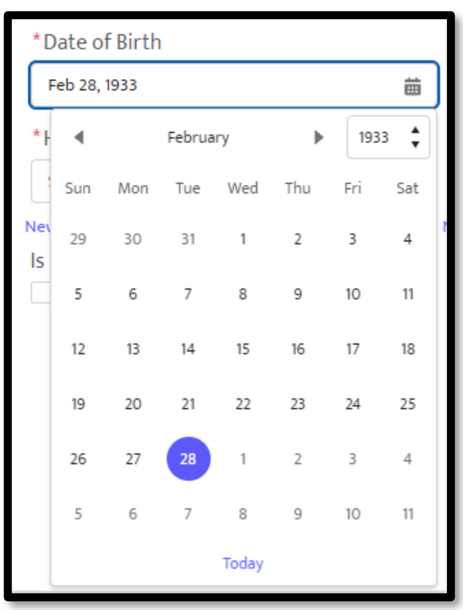
There are multiple ways to enter data into VIVÉ. These include:

- Text boxes, such as First and Last names



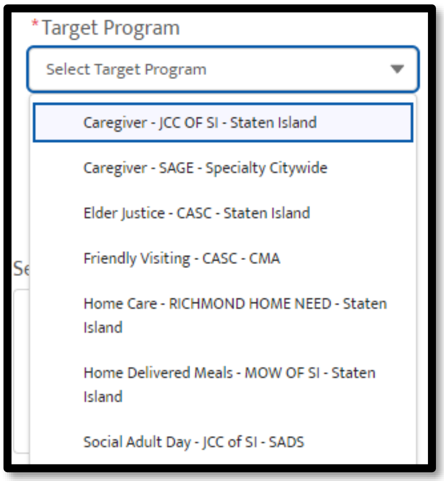
***NOTE**: The red asterisk (*) before both First and Last Name fields indicates these are required fields.*

- Date entries, such as date of birth or enrollment dates



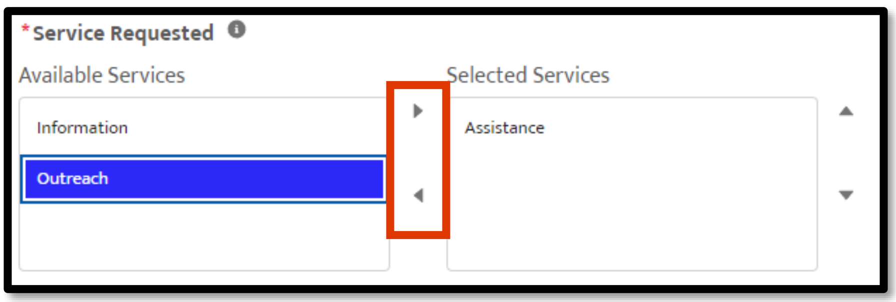
***NOTE**: A date can be entered by clicking through the calendar by month, date and year or typing it in directly. An entry of 2/28/1933 will be transformed to February 28, 1933.*

- Drop down menus, such as answers to assessment questions or referral targets



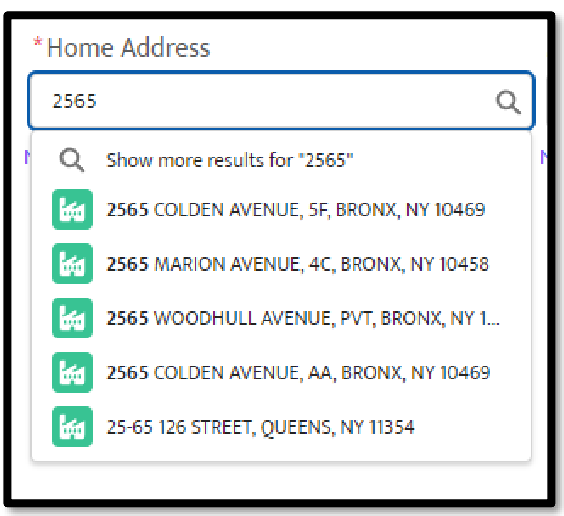
***NOTE**: The drop-down option uses type ahead technology or you can click on the option.*

- Multi-Select Lists, such as **Services Requested**



***NOTE**: The right and left facing triangles move the highlighted services between boxes.*

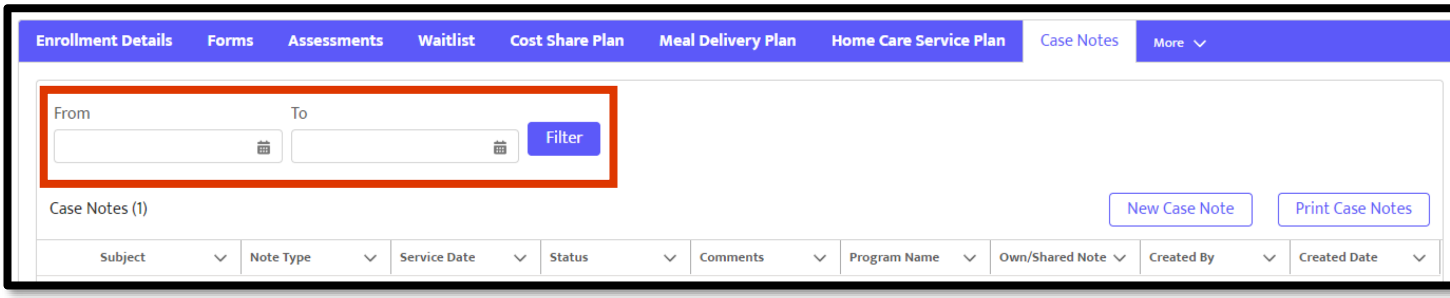
- Type ahead search boxes, such as Home Address

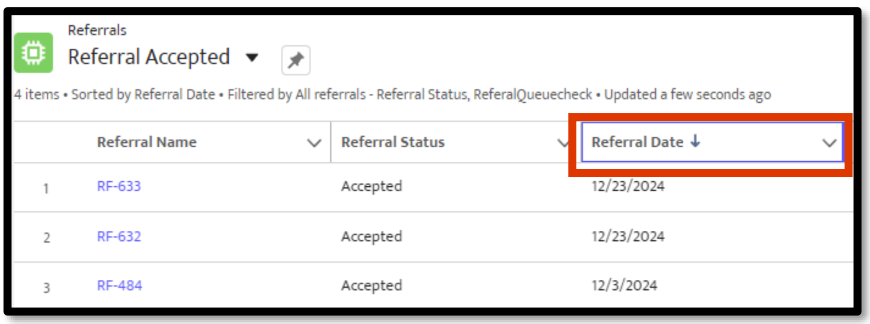


***NOTE**: The entry of "2565" begins to display address options. As more information is entered the list becomes more specific. Users can either click on the name or continue to enter the entire address.*

Searching by Filtering & Sorting

Beyond **Client Search** the user can either filter or sort column headings to find a client. For example, within **Case Notes**, the user can filter the case notes by date range.





Additionally, there are arrows within column headings that can sort the list. In the example to the left, note the downward pointing arrow in the Referral Date column. It sorts the list by the most recent date to the oldest. Clicking the column heading arrow again sorts in the opposite direction.

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.**

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