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The VIVÉ Contacts Reference Guide

VIVÉ is a 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 guidance instructions on the use of VIVÉ.

Contacts 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.

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's Standards.

In this guide you will learn:

- **Overview of Contacts**
- **Navigating to Contacts**
  - First Check to See if the Contact Already Exists
  - Associating an Existing Client as Your Contact
  - Associating an Existing Contact
  - Associating an Existing Professional
- **Entering in New Contacts**
  - Entering a New Contact
  - Entering a New Professional Contact
  - Enter a New Organization
- **Editing Contacts**
- **Inactivating Contacts**

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

Overview of Contacts

The Contact section is designed to keep information about individuals connected to the client. For ease of maintaining this information, **Contacts** is available on both the **Details Menu** and **Enrollment Details Menu**.

Contacts Shared Across Programs

Contacts are a shared resource, accessible across multiple programs. This interconnected approach ensures that client data remains consistent and up to date, fostering improved collaboration and reducing duplication of effort. However, because updates to contact details impact all programs, it's important to carefully review changes to avoid unintended consequences for shared clients.

Types of Contacts
There are three contact types:

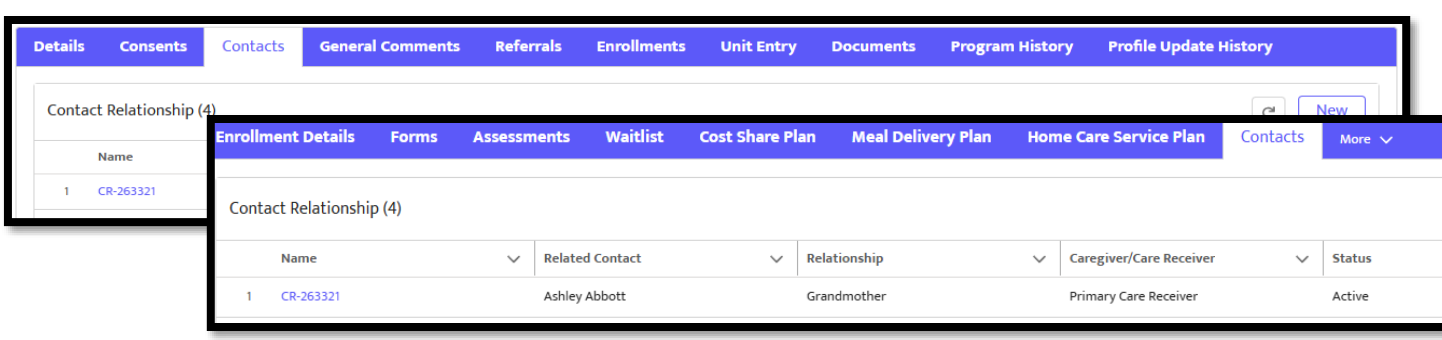
- **Client**: A person who is or has been enrolled in at least one NYC Aging program.
- **Contact**: A trusted person known to the client but not enrolled in an NYC Aging program.
- **Professional**: A service provider for the client, such as a doctor, pharmacy, or other professional.

When you add a contact as the Client type, the relationship is reciprocal—the added client will also have the original client listed as their contact. The information captured varies based on the contact type.

Navigating to Contacts

Contacts are located within the **Details Menu** and the **Enrollment Details Menu.**

Step 1: From the **Details Menu** or **Enrollment Details Menu**, click on the **Contact Tab**. Depending upon the width of your window, there may appear a **More** dropdown menu with additional navigational links.



Associating Contacts with Your Client

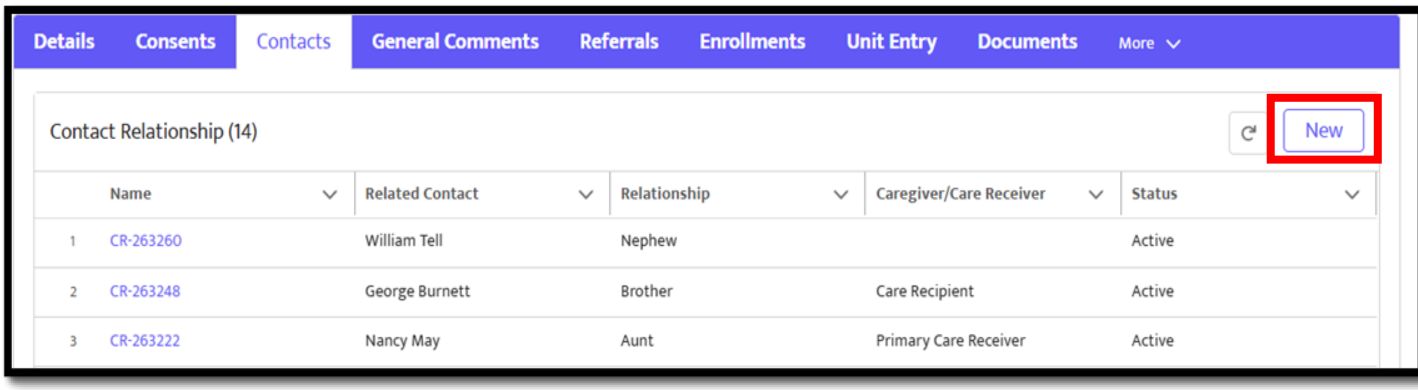
As there are three types of contacts, there are three pathways to associate them with your client. However, each of these pathways start the same way: searching for an existing contact.

First Check to See if the Contact Already Exists

It is often the case that two or more people may have the same contact. To streamline the contact management process and before entering a new contact you need to see whether the contact is already entered.

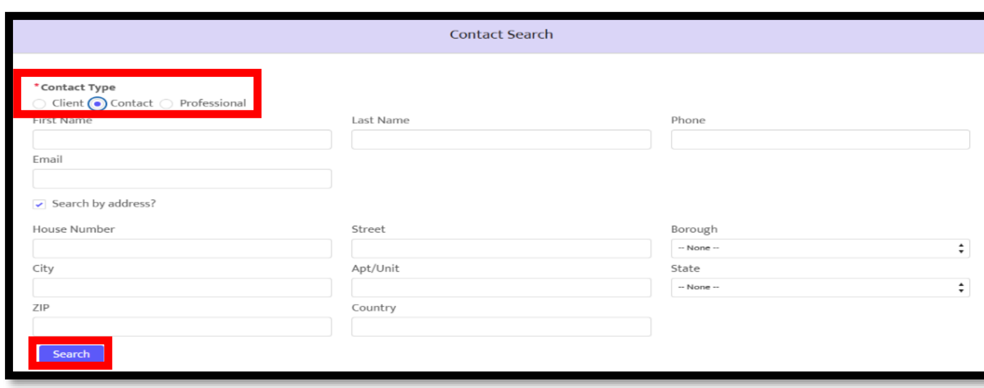
Step 1: From the **Top Menu**, click **Client Search**, click the desired client's name. Then, click the **Contacts** tab.

Step 2: After navigating to **Contacts**, select the **New** button.



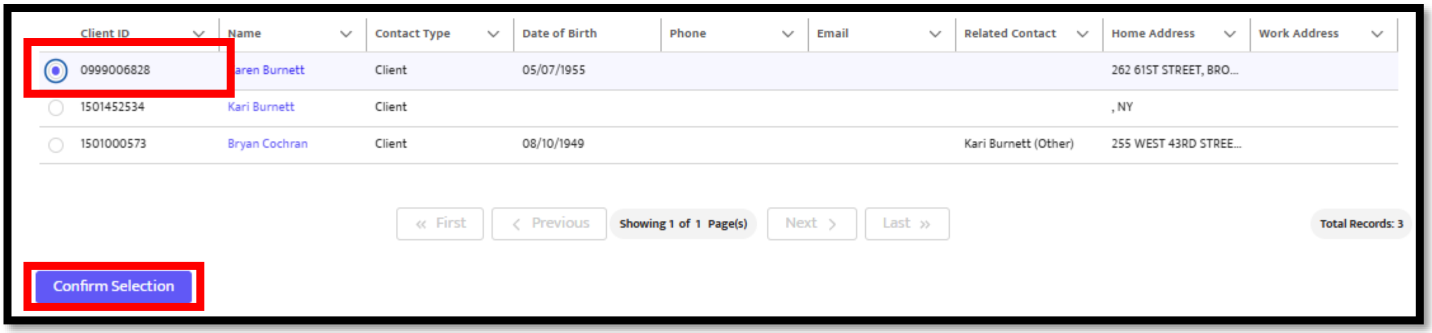
Step 3: Search to either find a match or confirm there isn't one to begin entering a new contact.

- From the **Contact Search** pop-up, select **Contact Type** by clicking the radio button next to it.
- Enter any known details about the contact (such as name, birth date phone number, etc.).

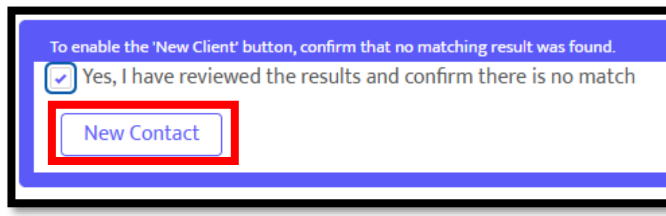


- To include a search by address, check the **Search by Address** box and enter the address.
- Select the **Search** button once all relevant information is entered.

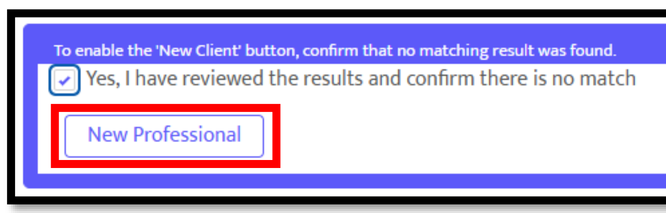
The search results for each type share the same selection process. There is a radio button to the left of an existing contact. Check that then select the **Confirm Selection** button to associate that person with your client. See below for more details on how existing contacts are associated with your client.



If a contact is found via the **Contact** search, mark the selection and confirm it as above. If a contact is not found, check the box to confirm there are no matches then select the **New Contact** button.



Similarly, if a **Professional Contact** is found, mark the selection and confirm it as above. If a professional contact is not found, check the box to confirm there are no matches then select the **New Professional** button.



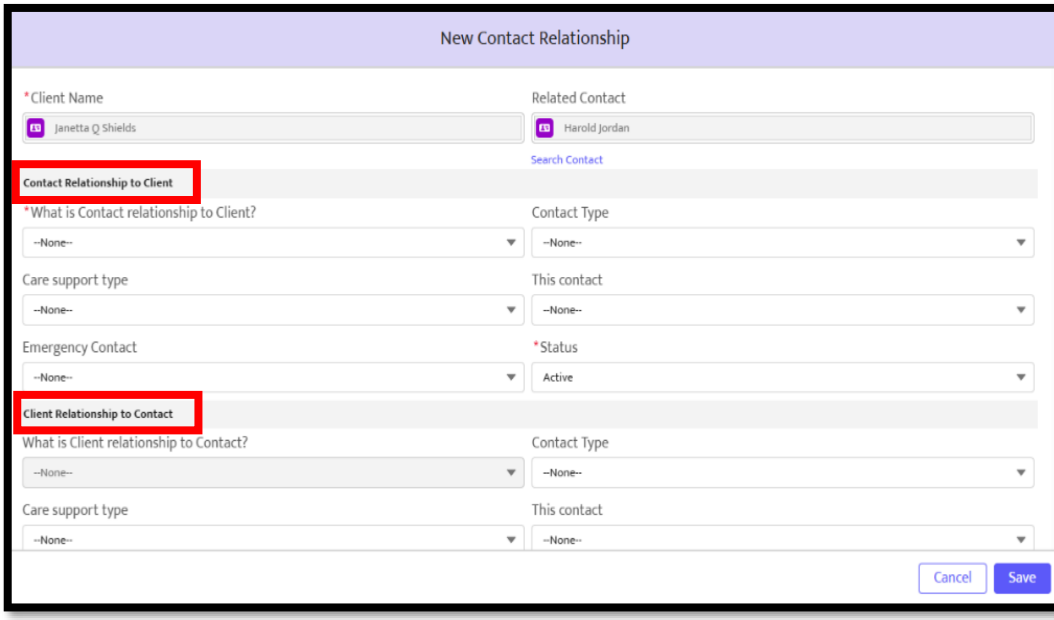
NOTE: *If the contact is not found via a Client type search, then proceed to searching the other types. You can search for only one type of contact at a time. Also, you are not able to enter a new client via Contacts.*

Associating an Existing Client as Your Contact

The information that is captured on a contact depends on the Contact Type. The Client as a contact **New Contact Relationship** pop-up asks questions about both the Contact Relationship to Client and the Client Relationship to Contact.

Step 1: After selecting the **Confirm Selection** button, you must complete the **New Contact Relationship** pop-up.

Step 2: Use the dropdown menus to identify the recipient or receiver of care, primary or other contacts, type and status of relationship. Keep in mind fields preceded by a red asterisk (*) are required. The comments section can be helpful to further describe the relationship.



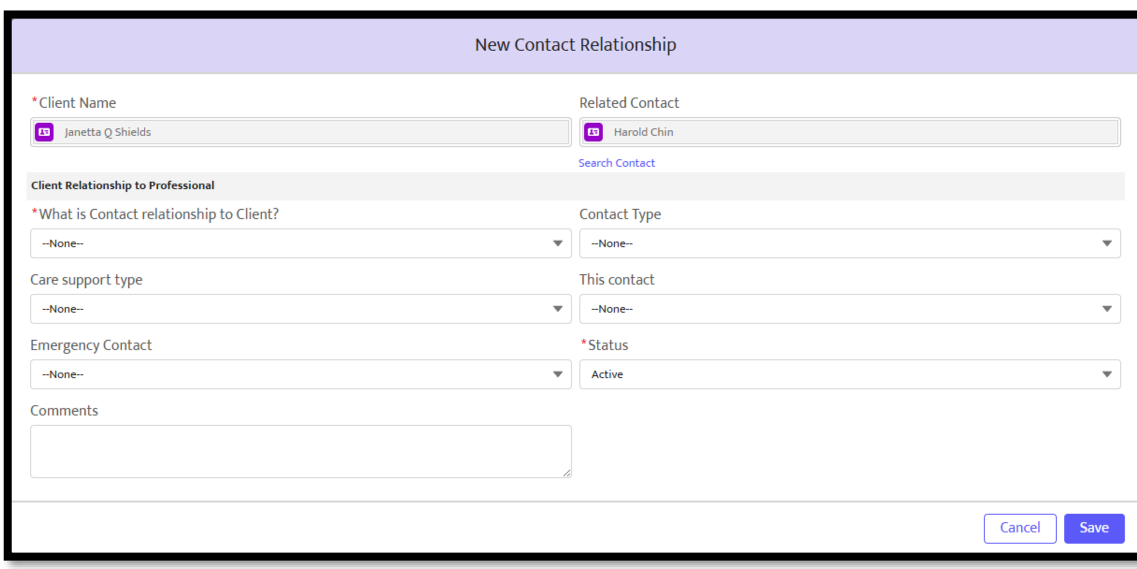
NOTE: *When you add a Client as a contact for another client, the relationship is reciprocal—the added client will also have the original client listed as their contact*.

Associating an Existing Contact

The **New Contact Relationship pop-up** for existing Contacts has fewer questions.

Associating an Existing Professional

The New Contact Relationship pop-up for existing professions has the least number of questions.

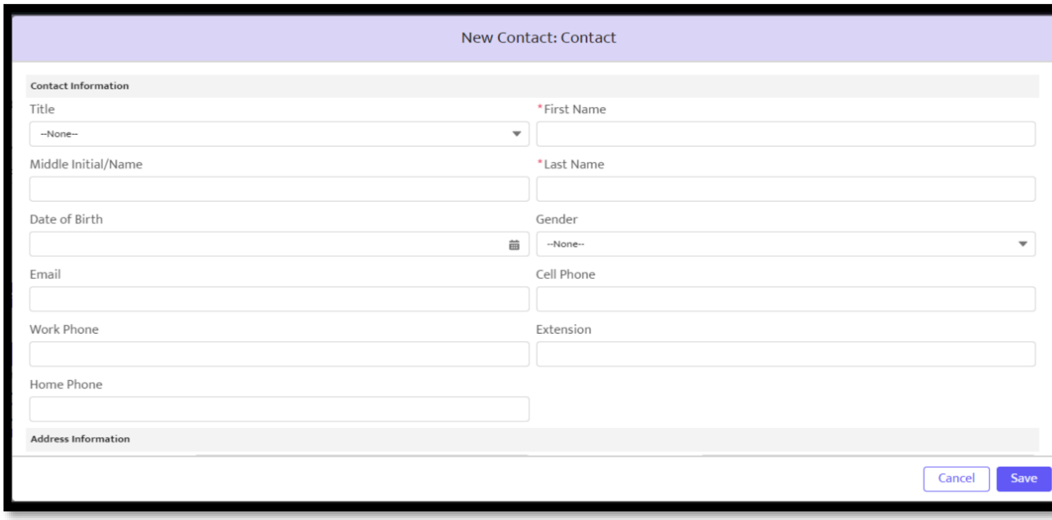


Entering in New Contacts

You can only enter in new Contact and Professional contact types. Each follow a different pathway when entering a new contact.

Yes, it can be confusing when talking about a contact type that is contact. We appreciate your understanding.

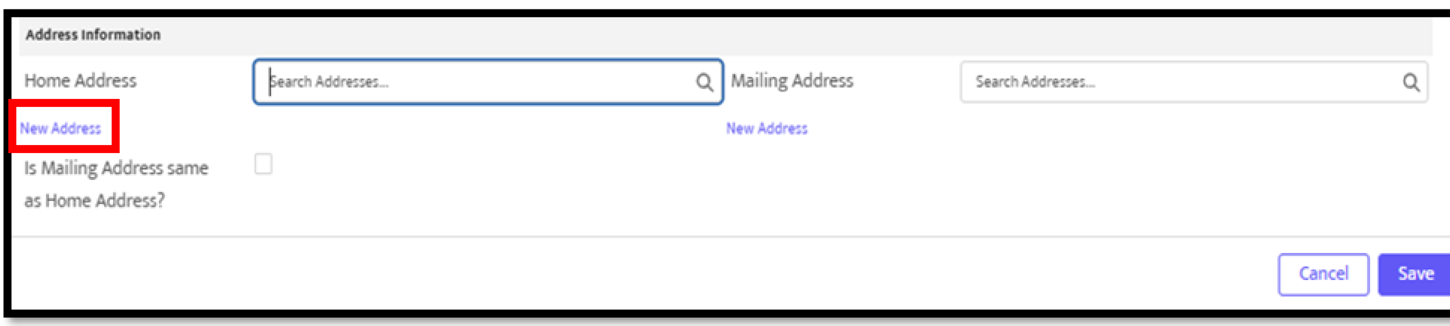
Step 1: After confirming no matches and selecting the New Contact button, complete the New Contact: Contact pop-up.



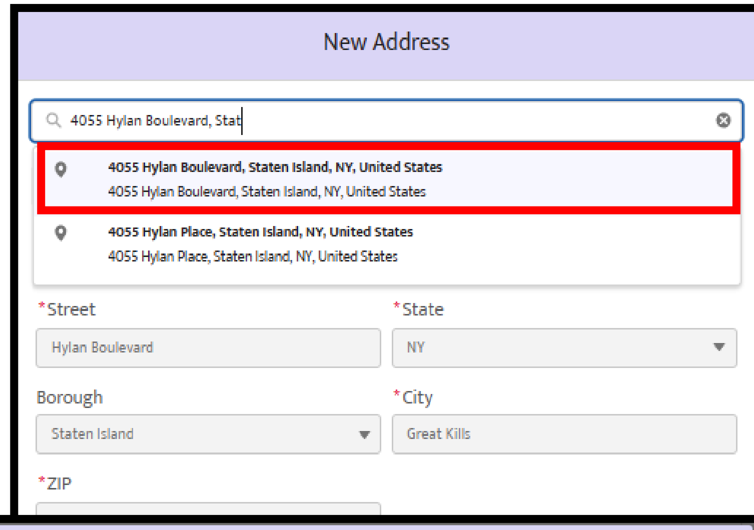
Step 2: While not required, it's best practice to always enter a phone number and an email address.

Step 3: Scroll down the page and enter the address.

Step 4: If the address cannot be found within the Search Address box, click **New Address**.

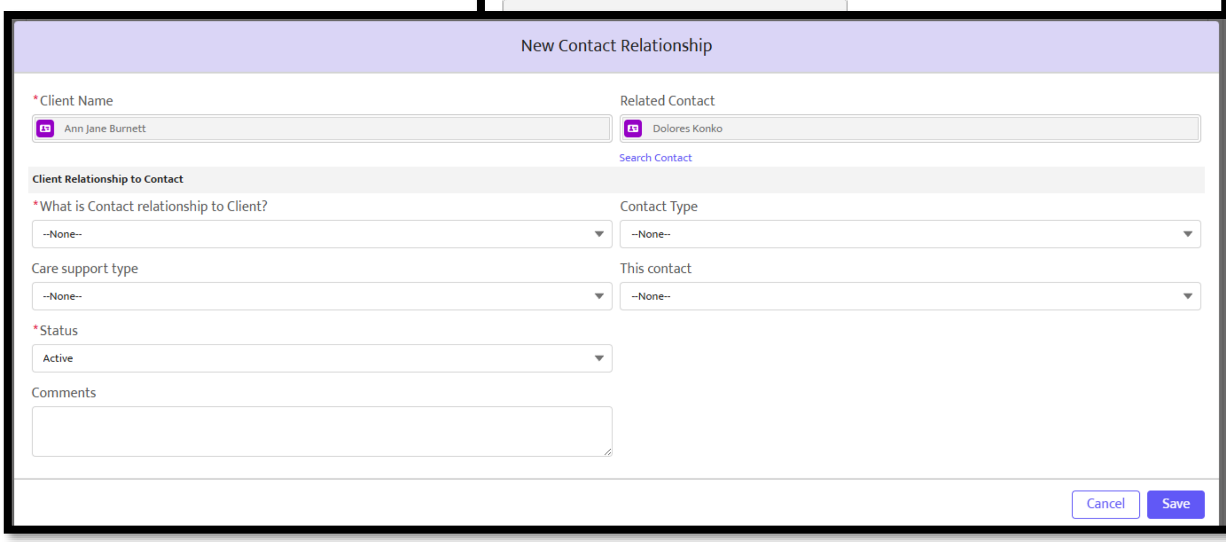


Step 5: When entering a new address, the type-ahead technology speeds finding address. Once you've found it, click on it and the details will autofill the fields. Review the entry to be sure all information is included, especially apartment information.



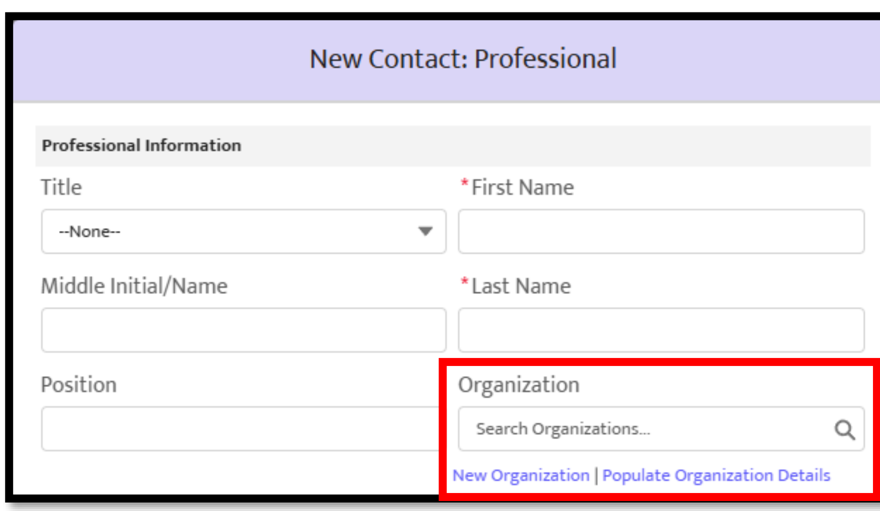
Step 6: Follow the similar process for Mailing Address. Or if they are the same, check the box that Mailing Address is the same as Home Address.

Step 7: Similarly, complete the same New Contact Relationship pop-up.



Entering a New Professional Contact

There are more steps to entering a professional contact, because professionals have organizations. Additionally, professional organizations, such as pharmacies can be associated with a client's Medication List.



Step 1: After confirming no matches and selecting the **New Professional** button, complete the New Contact: Professional pop-up.

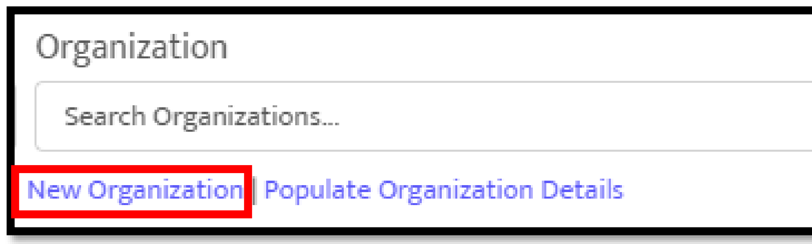
Step 2: While not required, it's best practice to always enter a phone number and email address.

Step 3: Use the type-ahead technology to find organizations previously entered or click on **New Organization**.

TIP: You can associate an organization with any Professional. When you do, the work address and phone number for the organization will auto-populate.

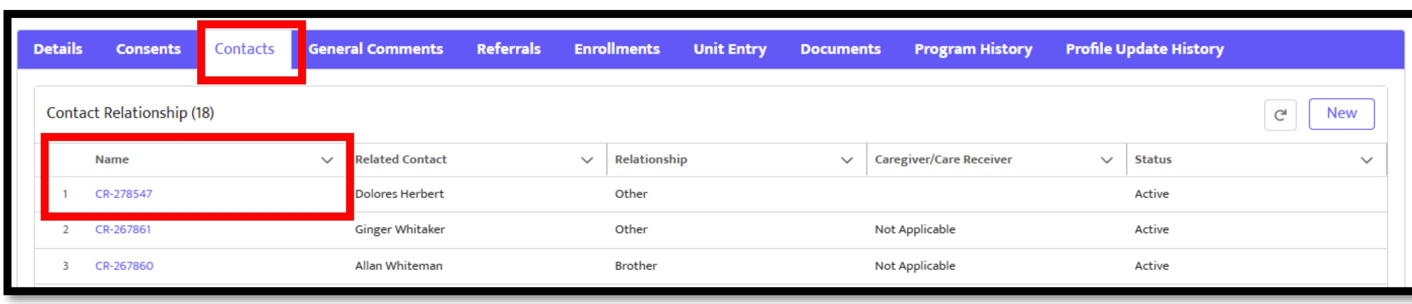
Enter a New Organization

- Click on the link underneath the input box **New Organization**. A new dialog box will pop-up.
- Enter the information you want to associate with the organization's name.
- If the address isn't found, then click on the New Address link.
- Enter the organization's information then select the Save button.

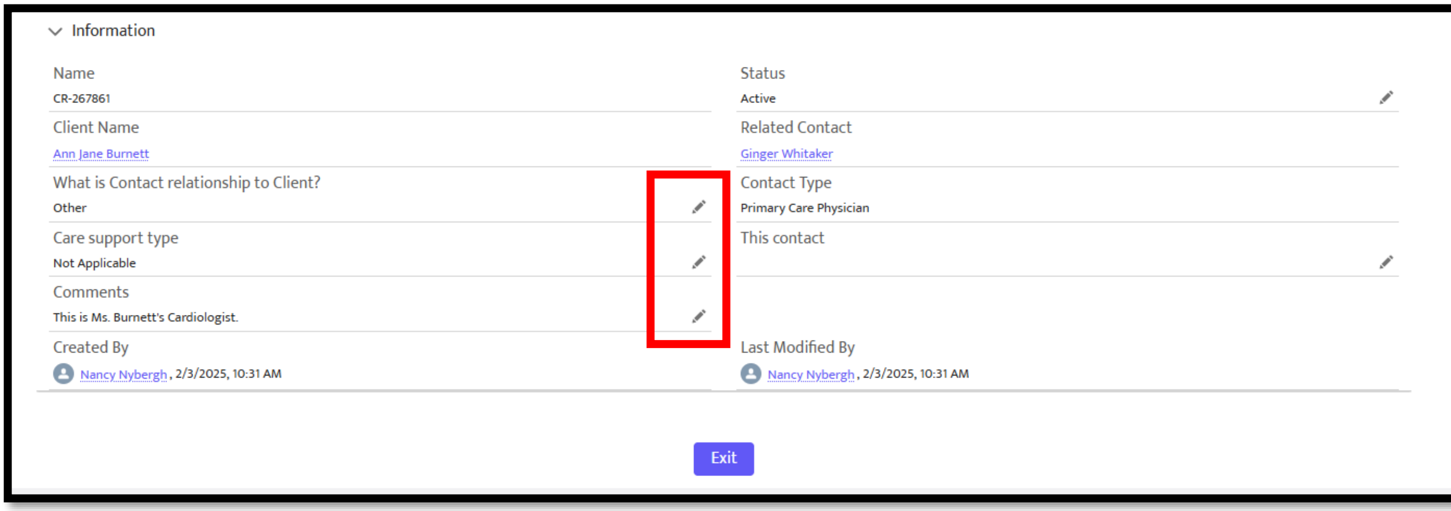


Editing Contacts

Step 1: From the **Contact** List View, click on the link in the **Name** column. The Contact Details displays.



Step 2: Click on the pencils within the **Contact** details to edit the fields. Once finished select **Save** located at the bottom of the form.



TIP: *Only fields that have the pencil or pen to the right of them can be edited. The Contact details display will be different depending on the contact type you are editing.*

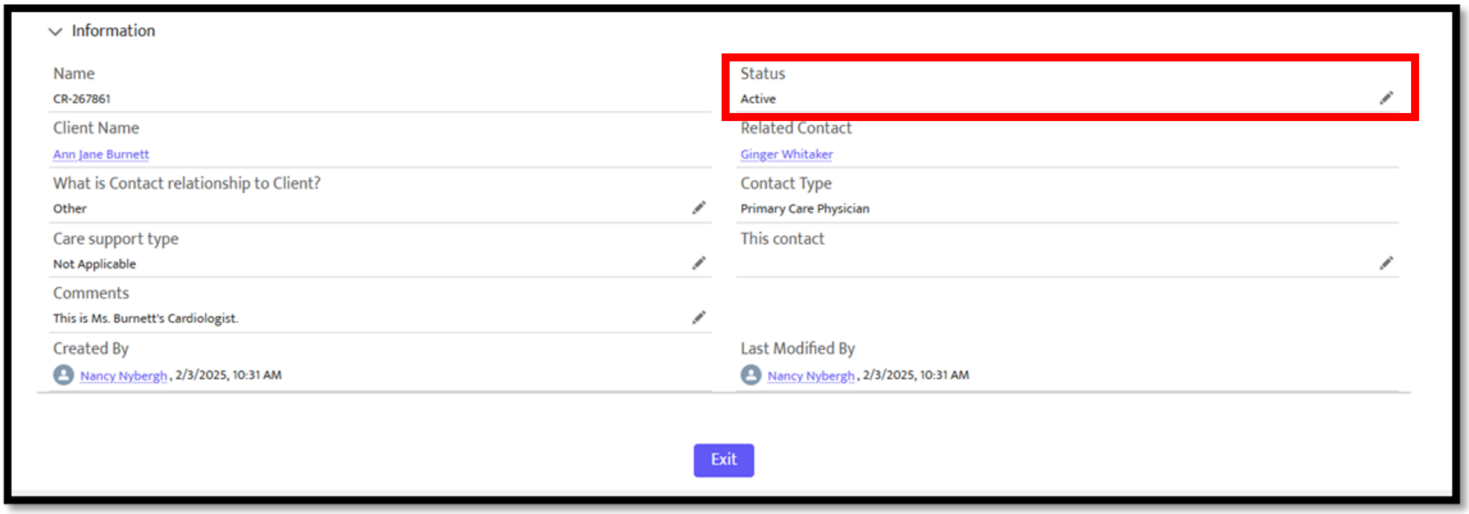
Inactivating Contacts

Inactivating a contact has the following impact:

- The contact is no longer a valid contact for the associated client. However, if the contact is associated with other clients that status remains the same.
- If the contact was a care receiver, they will no longer be able to be selected during a care receiver type assessment.

Step 1: From the **Contact** List View, click on the link in the **Name** column as done above. The Contact Details displays.

Step 2: Click on the pencils within the **Contact** details to edit **Status**.



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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