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VIVÉ Dashboard 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 navigating the **Dashboard**.

Dashboard 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. Or you can 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.

In this guide you will learn:

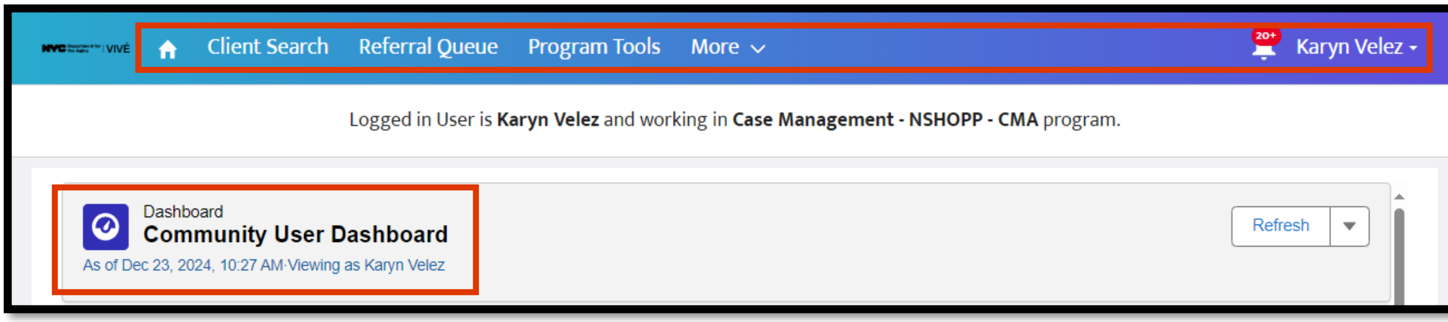
- **A Dashboard Overview**
    - The Top Menu Navigation
        - Notifications
        - User Name Profile
        - Refresh Button
- **My Enrollments**
    - Accessing the Client Profile
    - Accessing Enrollment Menu
- **My Follow-Ups**
    - Accessing the Follow-Up Request Screen
- **My Tasks**
    - Accessing the Task Details

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

A Dashboard Overview

The **Community User Dashboard** or **Dashboard** is your home page. Here you will have access to the **Top Menu**, as well as hyperlinks associated with enrolled clients, pending follow-ups for clients, and tasks that are to be completed.

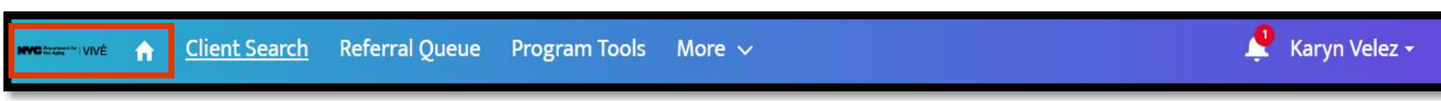
The **Dashboard** will be the first page to appear once you have logged into VIVÉ. Below are details of key navigational elements and details of their features.



The Top Menu Navigation

The **Top Menu** is displayed on every screen in VIVÉ streamlining access to critical navigational tools.

From any screen within VIVÉ you can return to the **Dashboard** home page by selecting either the **NYC Aging VIVÉ** logo or the **Home** icon.



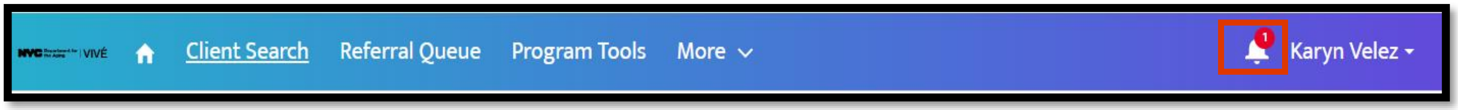
These are the critical links from the **Top Menu**:

- Client Search – This functionality conducts a search of clients, contacts or professionals. It includes an intelligent search. For example, it can search nicknames, such as Bob, and return results for Robert.
- Referral Queue – This functionality provides access to referrals that are either created, sent, or received by your program
- **Program Tools** – This functionality varies by program. Universally, users are able to access event profiles and the monthly unit summary. Depending upon the program, one or more of the following are available: ability to download blank forms, access links to surveys, print ID cards. manage wait lists for services, and send notifications to enrolled clients via email or text messaging.
- Admin Tools – This functionality is only available to Program Administrators who manage users, such as adding new users or making edits to current user details. For certain programs, this functionality will also manage staff who deliver meals.

- **Reports** – This functionality provides users with access to their program specific reports.
- **Field Service** – This funtionality is specific to route management of Home Delivered Meals programs.

Notifications

The **Bell Icon** alerts you to your **Notifications.** There is a number with a red background indicating how many notifications you have not yet reviewed. These notifications alert you to client related issues such as being assigned as the worker for a specific client or requests to follow-up on certain client issues.

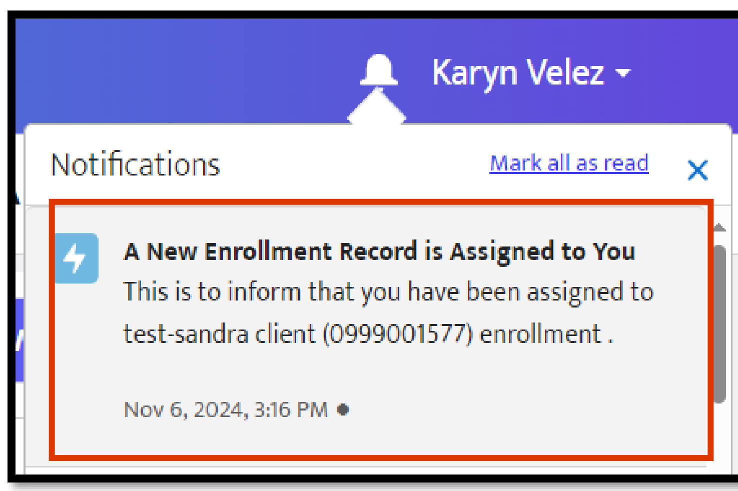


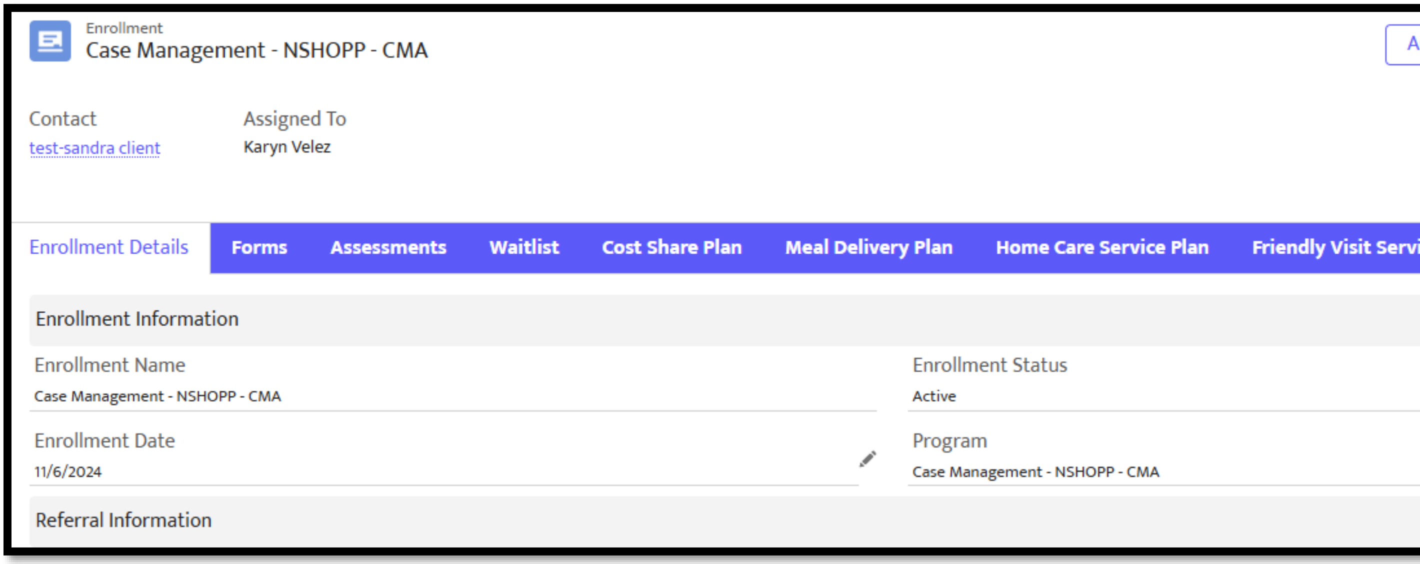
To view and access **Notifications**:

Step 1: Click the **Bell Icon** to view **Notifications**. A pop-up displaying all **Notifications** will appear. **Notifications** that are pending will be greyed out. The selection will also remove any numbers that previously were displayed on the **Bell Icon**.

Step 2: Once displayed, **Notifications** can be accessed by selecting the desired notification. This selection will bring you to the page associated with that specific notification.

In the example below, the notification was for a new **Enrollment** assigned to you for the client, Test-Sandra. Once the notification is selected, you will be directed to Test-Sandra's **Enrollment Details** (see graphic). You can now decide to either review information about this client or begin work on Test-Sandra's case file.



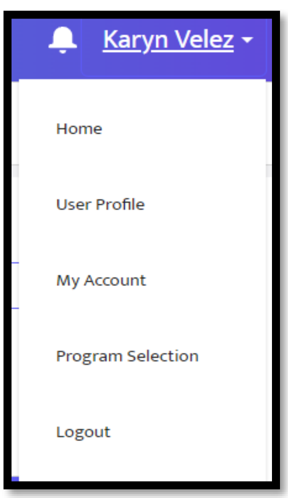


Notifications are ordered so that the most recent one appears at the top of the list. If you want to view others, scroll down.

NOTE: *Once a notification has been selected, it will no longer have a grey background.*

User Name Profile

User Name Profile is located on the **Top Menu** ribbon to the right of the **Bell Icon**. Clicking this link displays the options associated with your account. These include:



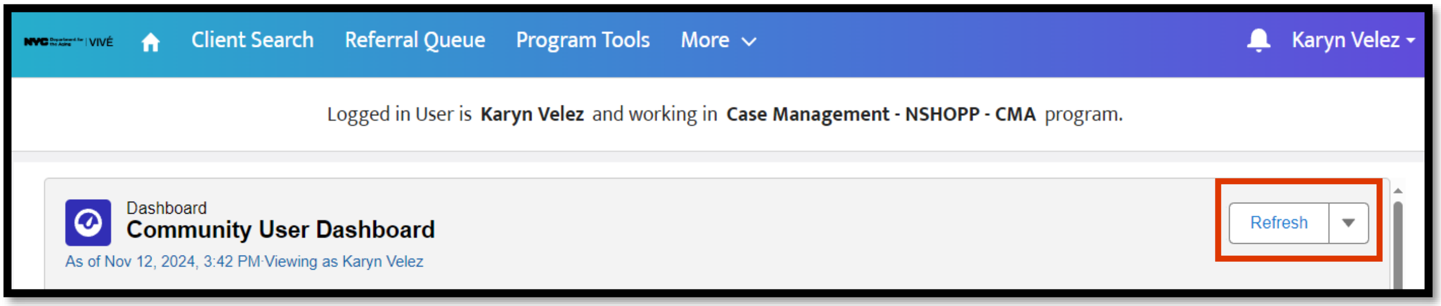
- **Home** – This functionality is used to bring you back to the **Dashboard** from any screen page in VIVÉ.
- **User Profile** – This functionality provides access to information about you including your 1) title, 2) supervisor's name, 3) email address, 4) company name, telephone number and address and 5) mobile number.
- **Program Selection** – If you are associated with more than one program, this functionality provides the means to switch among those programs.
- **My Account** – This functionality for **My Account** is basic information on your account in VIVÉ.
- **Logout** – This functionality enables you to log out of VIVÉ.

NOTE: *For a non-administrative user, this drop down list will default to their specific program and they will not have access to any other programs. On the* ***Dashboard*** *home page, your name as well as the program you are logged into will be displayed dircetly under the* ***Top Menu***.

Refresh Button

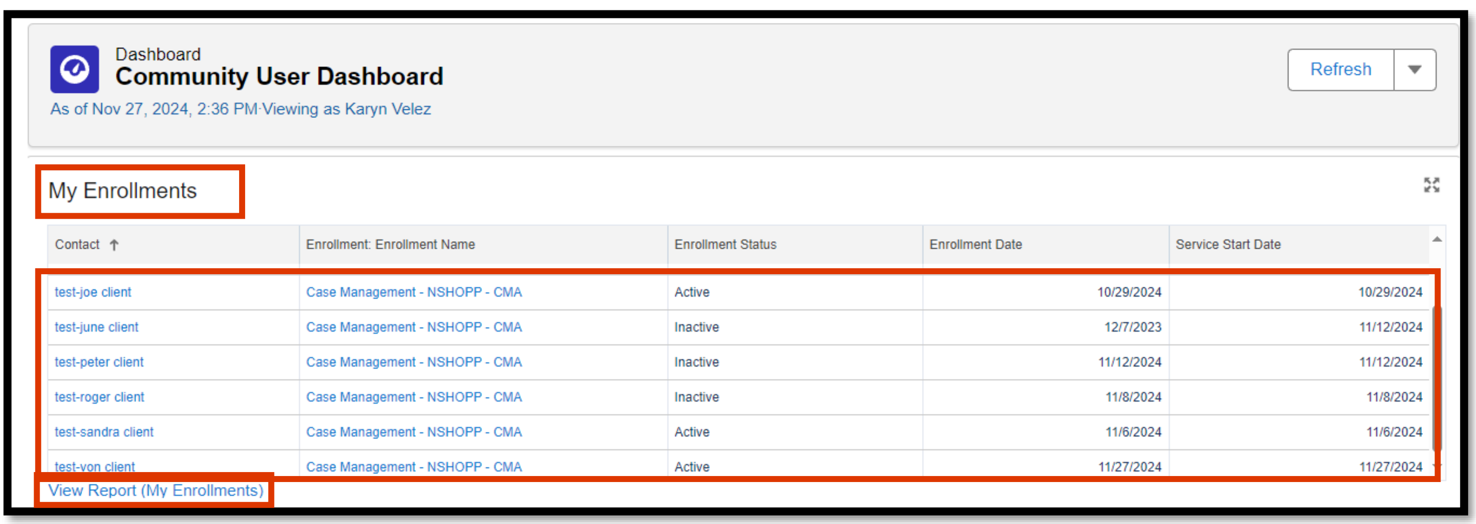
The **Refresh** button is used to “refresh” the various sections of the **Dashboard** page – **My Enrollments**, **My Follow-Ups** or **My Tasks**. Updates could include a listing of a newly assigned client or follow-up request. Also, the **Refresh** button will update any status changes with an enrolled client or follow-up request.

To update the **Dashboard**, select the **Refresh** button.



My Enrollments

All clients assigned to you will be displayed under **My Enrollments** on the **Dashboard**. This section includes information such as the client’s name, the date the client was enrolled in the program, and the status of the enrollment (**Active** or **Inactive**).

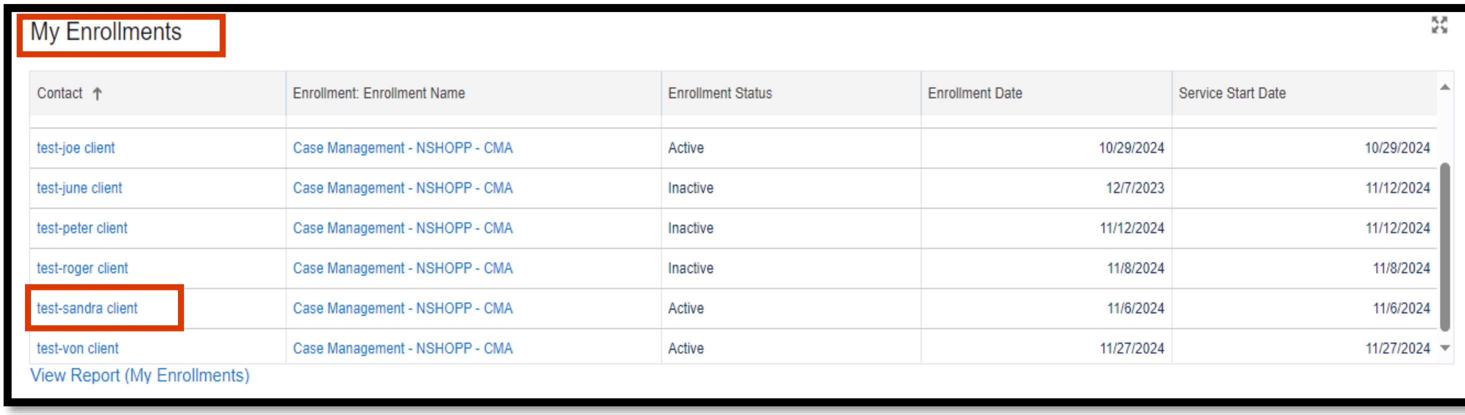


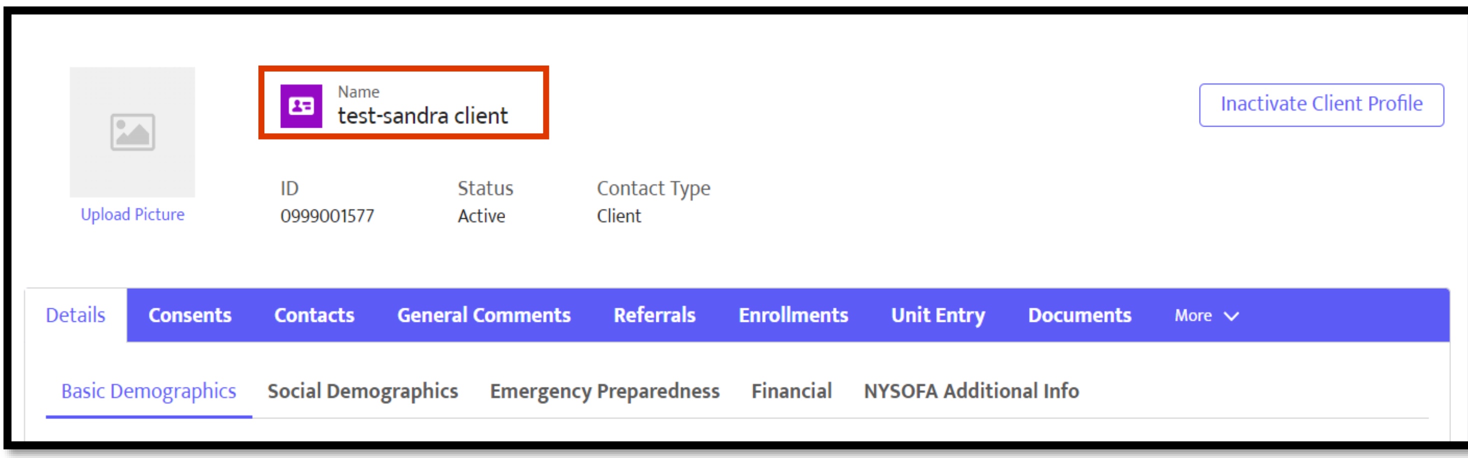
You can also review any reports associated with assigned clients on this portion of the page by clicking the hyperlink **View Report (My Enrollments)** at the bottom left. Finally, you can also access client files directly from **My Enrollments**.

When accessing a client file from **My Enrollments**, you have the option to access information on the **Client Profile** level or the **Enrollment** level for your program type.

Accessing the Client Profile

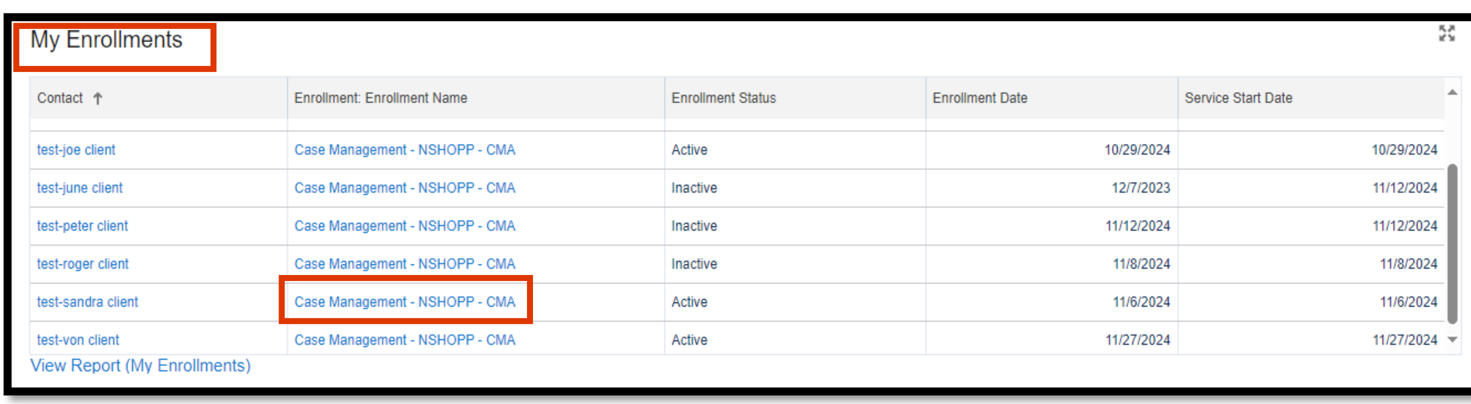
On **My Enrollments**, click the **Contact** link associated with the client's name. Once clicked, the **Details Menu** will appear.





Accessing Enrollment Menu

On **My Enrollments**, click the **Enrollment: Enrollment Name** link associated with the desired client. Once clicked, the **Enrollment** screen for your program type will appear for the client with the



default for the tab of **Enrollment Details**. On this tab page, an overview of the client's enrollment can be found.

My Follow-Ups

The section on the **Dashboard** directly underneath **My Enrollments** is **My Follow-Ups**. This section provides you with a List View of follow-up requests assigned to you for various clients. For each follow-up request you will be able to see overview information including the follow-up request type, its status (Open, Completed or Inactive) and the client associated with the request.

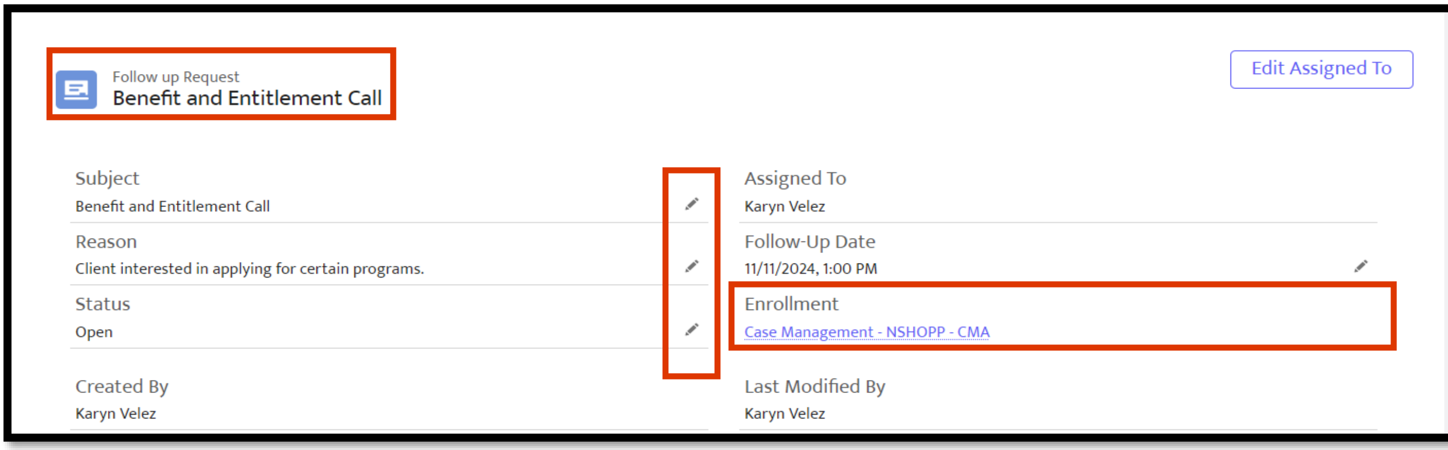
You can also review any records associated with assigned requests on this portion of the page by clicking the **View Report (My Follow-Ups)** link at the bottom left of this section.

Accessing the Follow-Up Request Screen

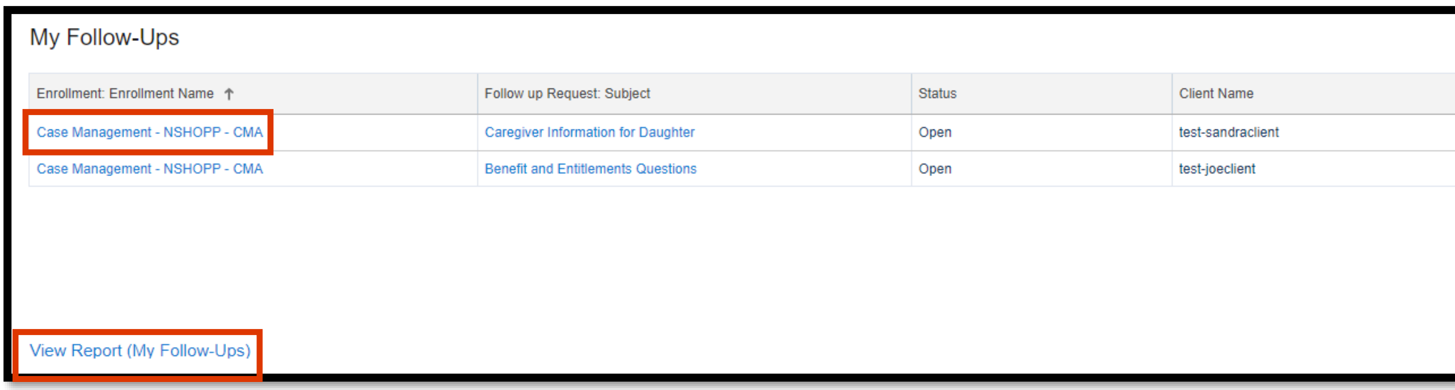
From the Dashboard's **My Follow-Ups** section, click the **Follow-Up Request Subject** link.

Once clicked, the **Follow-Up Request** screen will appear providing additional information, such as the reason for the request, the date and time the request is asked to be completed by and the person who created the request.

Use the pencil icons to edit the **Subject**, **Reason**, **Status** and/or **Follow-Up Date**.

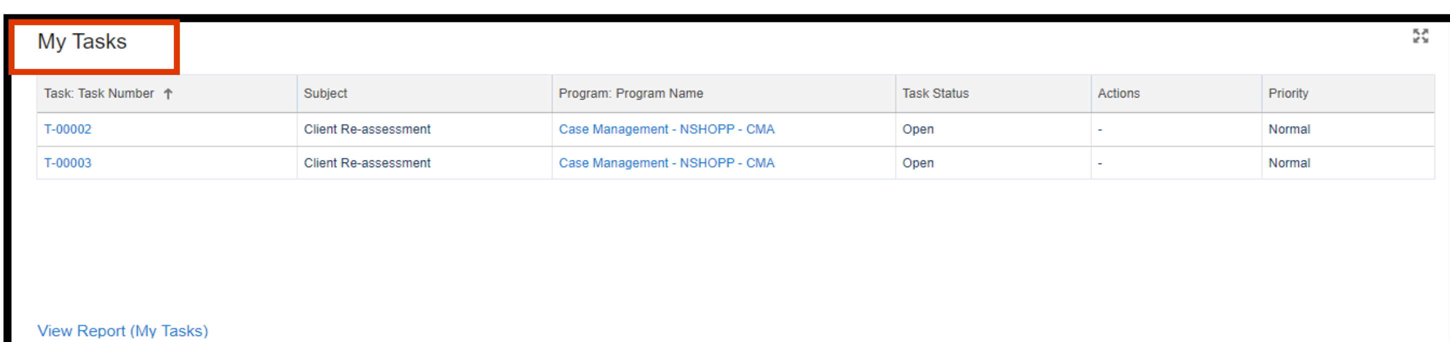


Also available from **My Follow-Ups** on the **Dashboard** is a link to the client's **Enrollment Menu**.



My Tasks

My Tasks is a program specific "tickler" for yearly client profile updates such as the Annual Client Enrollment Update or Reassessments. Unlike **My Enrollments** or **My Follow-Ups**, **My Tasks** will automatically alert all your VIVÉ program users of the clients who need their records updated.

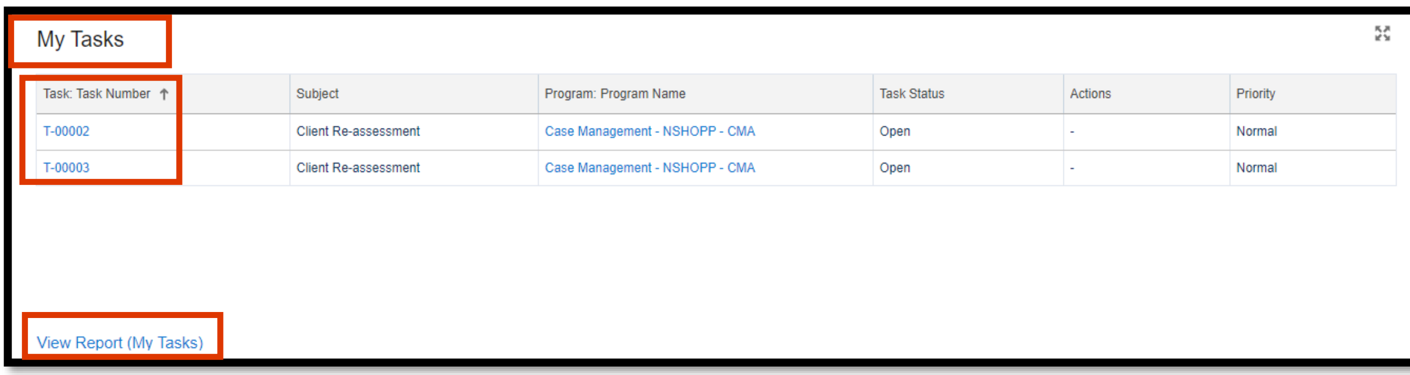


My Tasks displays information such as the type of client profile update needed, the **Task Status** (Open, In Progress or Closed), any **Actions** that have been taken regarding the task and the task's **Priority** level (Normal, Medium or High). In addition, under the heading **Task: Task Number**, upcoming tasks are given an identification number that can be sorted as needed.

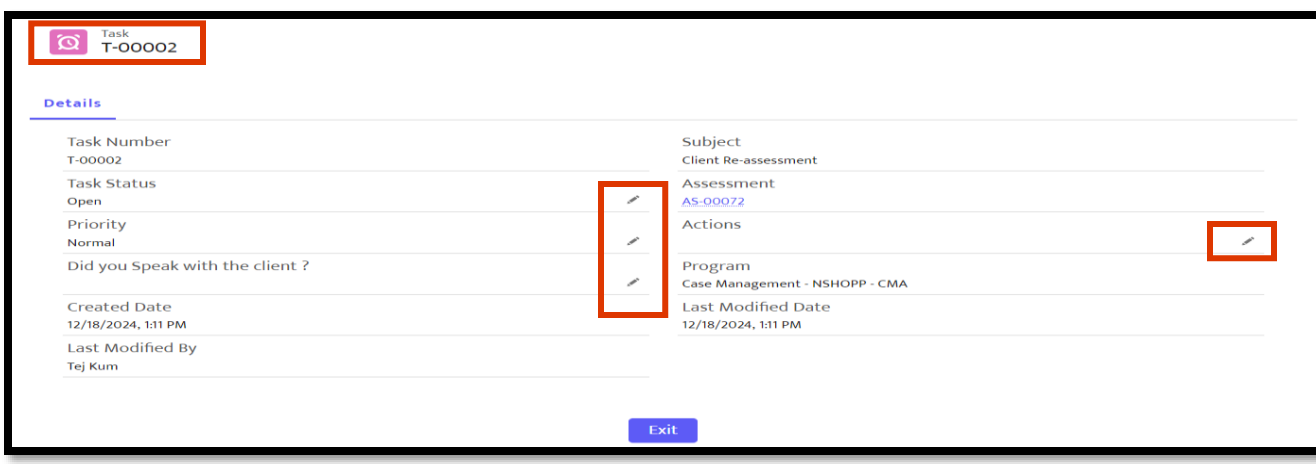
VIVÉ program users can also review a report on their **My Tasks** by clicking the link **View Report (My Tasks)** on the bottom left.

Accessing the Task Details

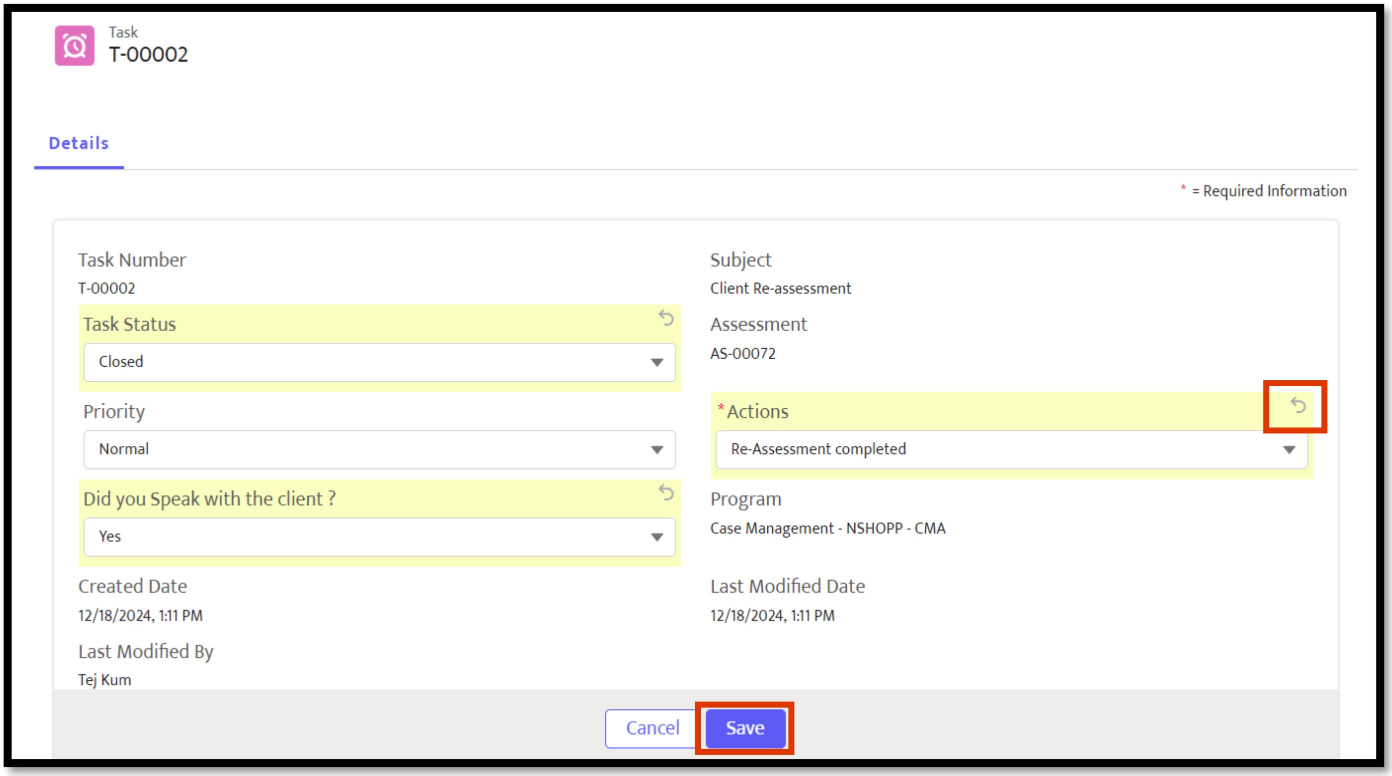
Step 1: From **My Tasks**, click the **Task: Task Number** link for the desired task. Once clicked, the **Task Details** screen will display related task information such as a hyperlink that directs you to the last Client Enrollment or **Assessment** created for the client. You will also be able to edit the screen by selecting any of the pencil icons.



Step 2: Select pencil icons to make the task details editable.



After making an edit, the area around the edited field is highlighted and there is an undo icon that appears. Clicking the undo icon returns the value to the last time the page was saved.



Saving the screen will bring you back to the **Task Details** screen where your updates will be noted.

Note: *The Exit button returns you to the* ***Dashboard****. Any updates made will not be seen on the* ***My Tasks*** *list view until the* ***Dashboard*** *is "refreshed."*

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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