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## The VIVÉ Glossary

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 guidance instructions on the use of VIVÉ.

You may have accessed 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 an alphabetical glossary of the key terms within VIVÉ. For other programmatic terms, please refer to your program officer or view NYC Aging's Program's Standards.

| Term | Definition |
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| **Accept (Referral Action)** | Action by the receiving program to accept and process a client referral for services. (For more information) |
| **Assessment** | Assessment tools consist of multiple forms to understand the client's current state. Once completed, an Assessment is locked and cannot be edited. It can be cloned for future use, with each new assessment reflecting the client's status at that time, supporting ongoing monitoring. |
| **Assessment Status** | An Assessment has three status types: Pending (not yet completed), Completed (reviewed thoroughly) and Inactive (a retrieval form of deleted). |
| **Attendance** | Check this box to mark a client as attending an event. Checking this box automatically adds 1 to the Units column. |
| **Case Notes** | Document interactions and progress with clients. Case notes are legal documentation and must be accurate and thorough. |
| **Case Note Status** | There are three statuses for Case Notes: draft, final (the status given after a review of a Case Note), and inactive. |
| **Client** | A person receiving services through the VIVÉ system. |
| **Client ID** | Unique identifier for each client. |
| **Client Profile** | From the **Details** Tab, where demographic, financial, consent, contacts, enrollments and program history is maintained. |
| **Client Search** | Tool for searching clients, contacts, or professionals by name, DOB, ID, etc. |
| **Clone an Assessment** | Once an Assessment is completed, it can be cloned to streamline the process of updating it. |
| **Community District** | Geographical area within NYC for organizing services, such as home-delivered meals. |
| **Consent** | The process of documenting a client's informed consent to collect and share information includes three forms: Consent to Collect, Consent to Refer and Share, and Revoking Consent. |
| **Contact** | Person associated with a client, like a family member or friend. |

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| **Cost Share Plan** | Documented care plan notes in the COMPASS Summary, recorded in Case Notes. |
| **Current Services** | Screen where users enter services the client is currently receiving. |
| **Dashboard** | Homepage in VIVÉ showing enrolled clients, pending tasks, and notifications. |
| **Documents** | Tool for adding and managing client-specific documents in VIVÉ. |
| **Enrollment** | Process of adding a client to a program. Once enrolled, the client's interactions with the program can be tracked such as events, case notes, and units. |
| **Event Profile, Event Sign Up, and Units** | Tools for creating events, signing clients up for events, tracking attendance, and recording units. |
| **Fee Amount** | Optional field in Event Profile specifying contributions clients make towards the event. |
| **Follow Up** | Feature for setting reminders for client follow-up tasks. |
| **Forms** | Individual tools to evaluate and better understand the client. These vary by program. |
| **Funding Source** | Specifies the financial source for an event or other activities. These include NYC Aging or Discretionary funding sources. |
| **General Comments** | Notes about the client that all users can view. These are not case notes. |
| **Geo-code Match** | Verifies if a client's address matches a specific geographical area. |
| **Host Type** | Specifies the event format (e.g., in-person, virtual, or telephonic). |
| **Inactive or Inactivate** | Nothing within VIVE can be deleted. Inactive or Inactivate indicates something is no longer relevant to a client or would otherwise be deleted. Inactivated items can be re-activated. |
| **Linking Case Notes to Units** | Units are linked with case notes. There can be multiple case notes associated with one unit entry. |
| **List View** | Displays a number of items in a table format to streamline navigation as well as provide an overview of the client. |
| **Login** | Process of accessing VIVÉ via a web-based interface with an NYC ID account. |
| **Monthly Unit Summary** | VIVÉ report that summarizes all units entered for events/services in a month. After review, it must be finalized, locking the month so no further clients or activities can be added. If finalized by mistake, contact your program officer. |
| **More Dropdown Arrow** | Button indicating additional options, usually represented by a down caret ("v"). |
| **My Account** | Section for managing personal account settings. |
| **My Enrollments** | Dashboard section showing clients assigned to the user, with enrollment status and quick access to files. |
| **My Follow-Ups** | Dashboard section showing follow-up requests, including type, status, and client info. |
| **My Tasks** | Dashboard section for task notifications (e.g., yearly profile updates), showing status, priority, and due dates. |
| **Notification Bell Icon** | Icon on the Dashboard for new follow-up requests or updates. Clicking shows notification details. |
| **Pencil Icons** | Icons used in Task Details to make fields editable (e.g., Task Status, Priority level). |
| **Profile Update History** | Tracks changes to a client's profile (e.g., updates to demographic information). |
| **Program History** | Displays the client's history with other enrolled programs. |
| **Program Selection** | Drop-down list for selecting a specific program, with default settings for non-admin users. |
| **Program Site** | Physical or virtual location for an event; auto-filled based on program address but editable. |
| **Program Tools** | Tools for managing events, enrollments, and features within the program. These tools vary among programs. |

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| **QR Code** | Streamlines client search, sign-up for an event or entering units. |
| **Recalculate Units** | Recalculates and includes newly entered units in the Monthly Unit Summary after initial generation. |
| **Referral Queue** | View and manage referrals, allowing client contact info sharing with other NYC Aging programs. |
| **Referral Status** | Indicates the current status of the referral (e.g., sent, accepted, rejected). |
| **Referrals Shared by My Program** | Displays referrals sent from your program. |
| **Refresh Button** | Refreshes Dashboard sections (e.g., My Enrollments) to reflect recent updates. |
| **Reports** | Where to access reports other than the Monthly Unit Summary, which is accessed from Program Tools. |
| **Service Type** | Required field defining the type of service provided (e.g., Education & Recreation, Counseling, Group Session, etc.). |
| **Share with Other Programs** | Makes case notes accessible across linked programs (e.g., case management and friendly visiting). |
| **Source Program** | Program referring a client to another program for further care/services. |
| **Status History** | Displays a client's historical enrollments in your program. |
| **Territory Management** | Feature for administrators to manage program boundaries and responsibilities. |
| **Top Menu** | Persistent menu for accessing Client Search, Referral Queue, Program Tools, Reports. Plus, other key tools, notifications, and user profile info across all pages. |
| **Unit Entry** | Feature to input specific service units for clients in VIVÉ, at multiple levels. |
| **Unit Type** | Type of unit associated with an event, populated based on Service Type (e.g., "Event" for Arts and Culture). |
| **Upload Files** | Functionality for attaching files or documents to client records. |
| **User Management** | Tool for managing user access and permissions in VIVÉ. |
| **VIVÉ** | Web-based system for managing nutrition counseling, client data, and administrative tasks. |

**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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