The VIVÉ Unit Entry 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 creating, voiding, and other features of **Unit Entry**.

Unit Entry 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's Standards.

In this guide you will learn:

Overview of Unit Entry

Unit Entry is where you record your events and services. This could be for services provided on an individual client level or at a group or event level.

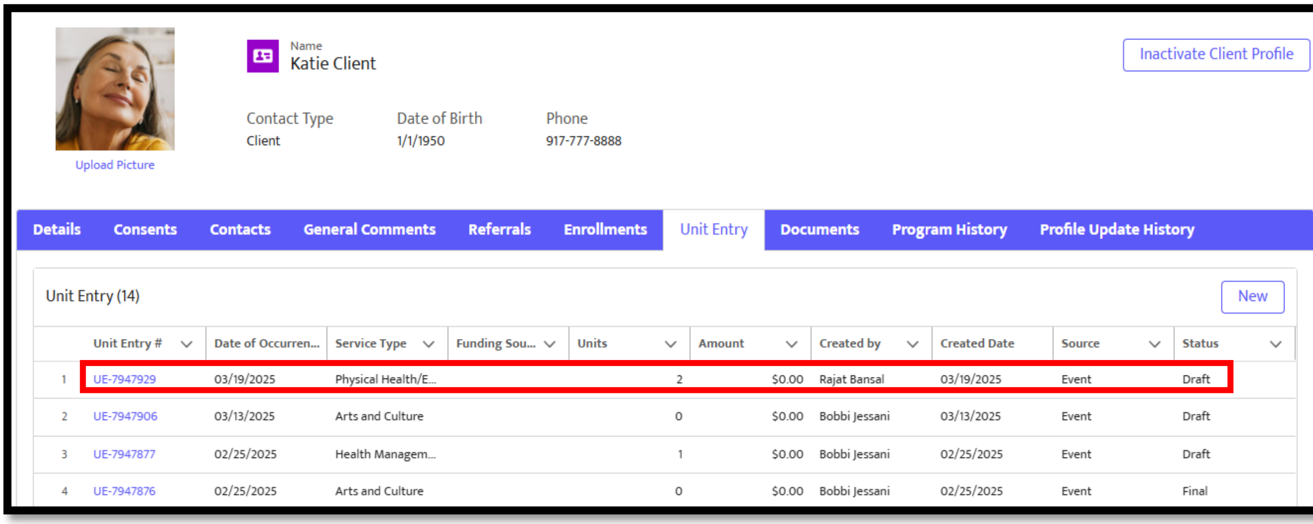
You can enter units in VIVÉ in three places: **Details Menu**, **Enrollment Menu**, or **Program Tools**. For more information on Events.

Editing Existing Units from Details Menu

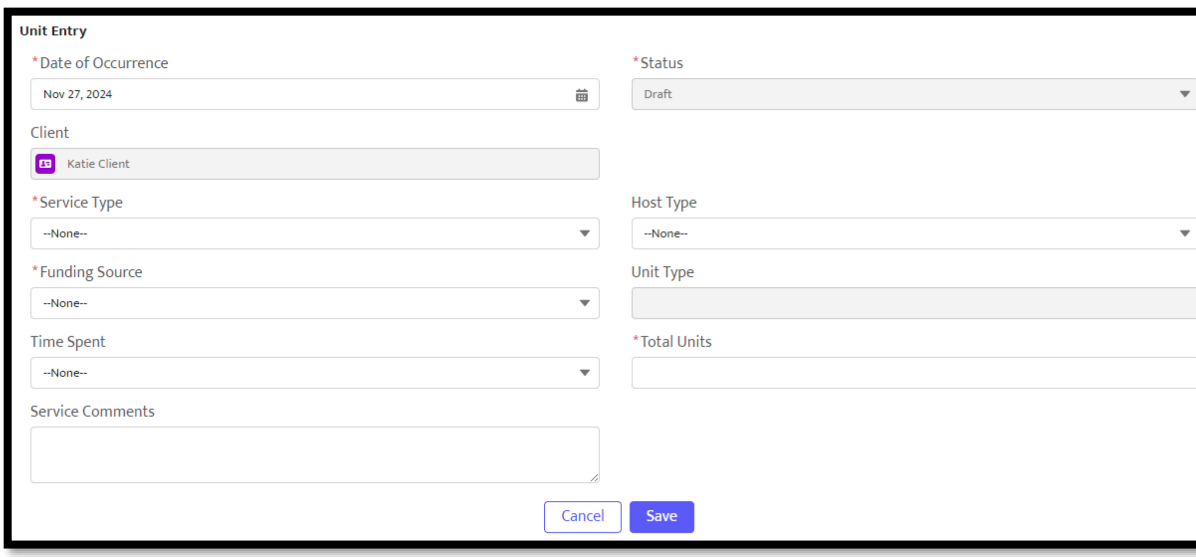
Step 1: From the **Top Menu**, click **Client Search**, find the desired client and click their name link.

Step 2: From the **Details Menu** click the **Unit Entry** tab.

Step 2: From the **Unit Entry** tab. Click on a Unit Entry # link to view details.



Step 4: Edit the unit entry details, then **Save**.



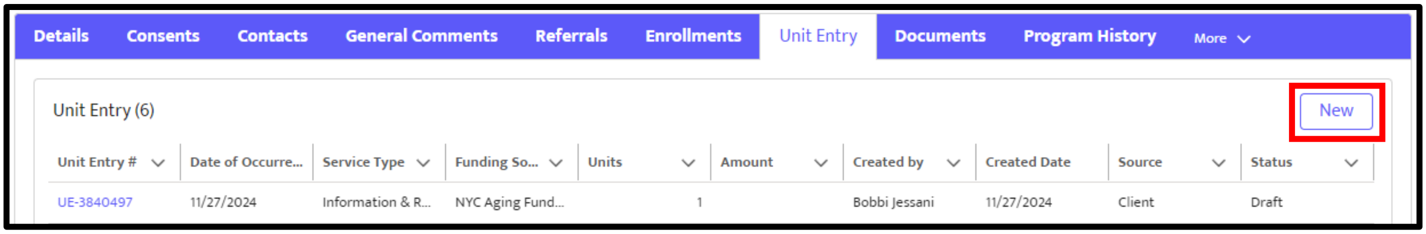
NOTE: *Units are in draft status until the Monthly Unit Summary is finalized. More on that below.*

Entering Units via the Details Menu

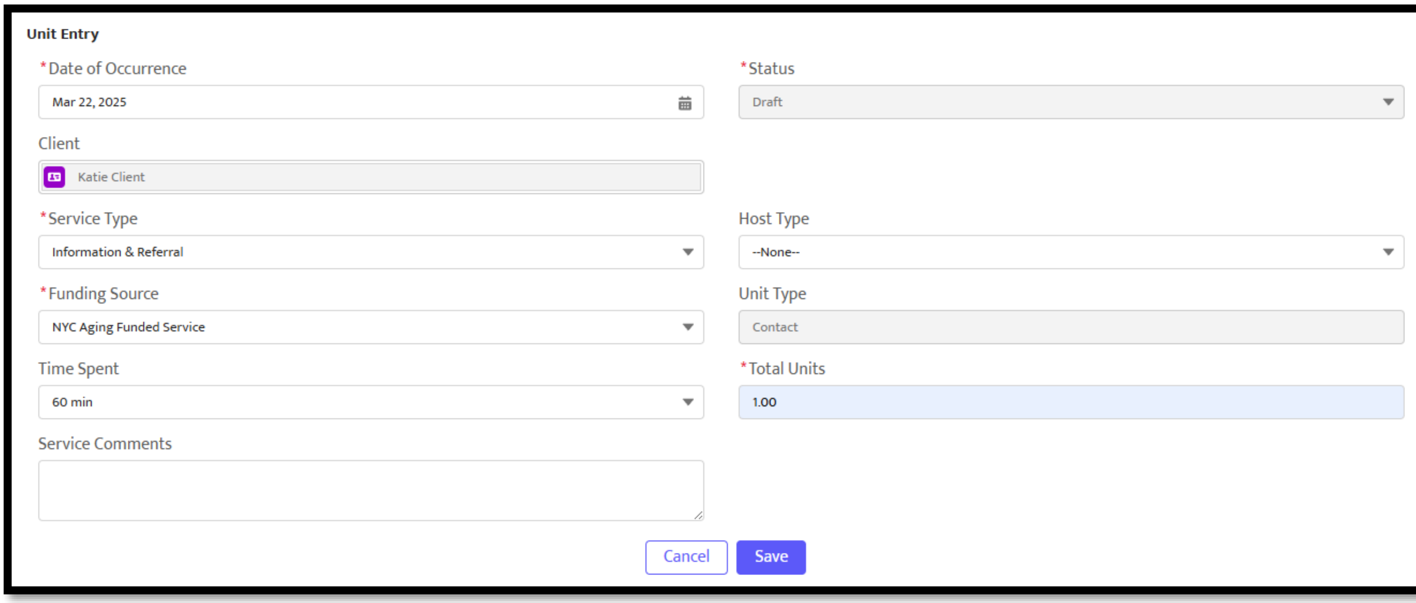
Certain service type units can be entered here entered from the **Details Menu** (also referred to as, Client Profile). For example, Information & Referral (I&R) unit types can be entered here. For other unit types for enrolled clients, access **Units Entry** from the **Enrollment Details Menu**.

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

Step 2: From the **Details Menu**, click **Unit Entry,** and select **New**.



Step 3: Complete the fields - those marked by red asterisk (*) are required and needs to be completed before selecting **Save**.



NOTE: *Service Type and Unit Type are inter-related. Based upon the Service Type selected, VIVÉ will automatically populate the appropriate Unit Type.*

Entering Units from the Enrollment Details Menu

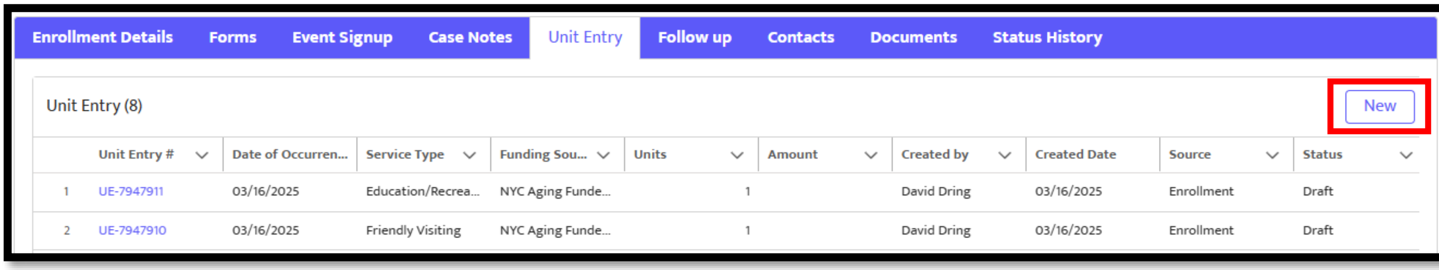
Enrollment units are specific to your programs and services. From the **Enrollment Details Menu** you are entering units specific to your client.

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

Step 2: From the **Details Menu**, click **Enrollment**.

Step 3: From the **Enrollment Details Menu**, click the **Unit Entry** tab. Depending upon your window's width, you may have to select More to access Unit Entry from that dropdown menu.

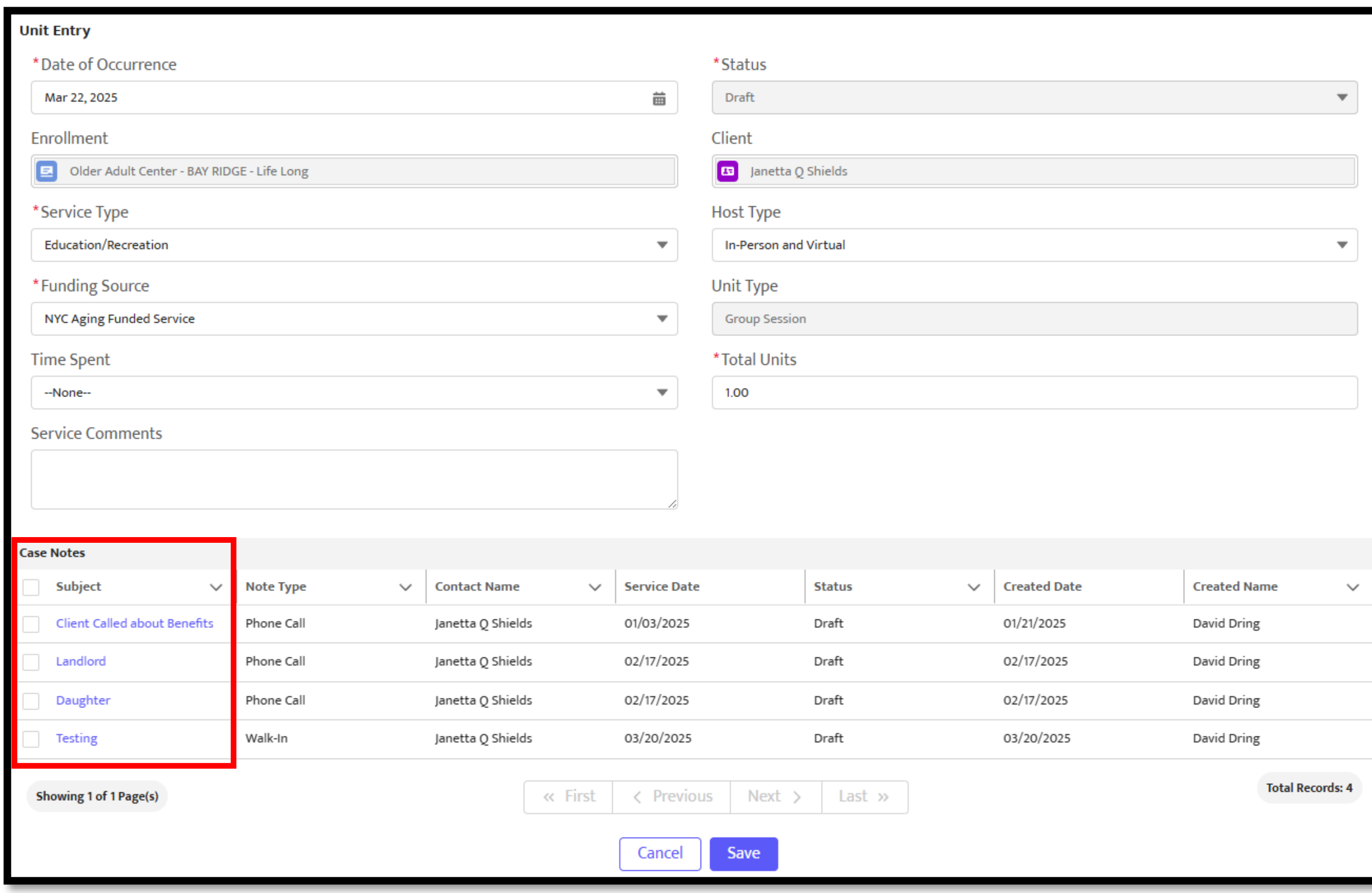
Step 4: Select the **New** button.



Step 5: Enter the details, especially the required fields of your unit.

Step 6: If desired, check the box of a case note (at the bottom of the details page) to associate one or more case notes to the unit.

Step 7: Select **Save**.



TIP: *Service comments are optional; however they can be helpful details when reconciling units.*

Editing Units from Enrollment Details Menu

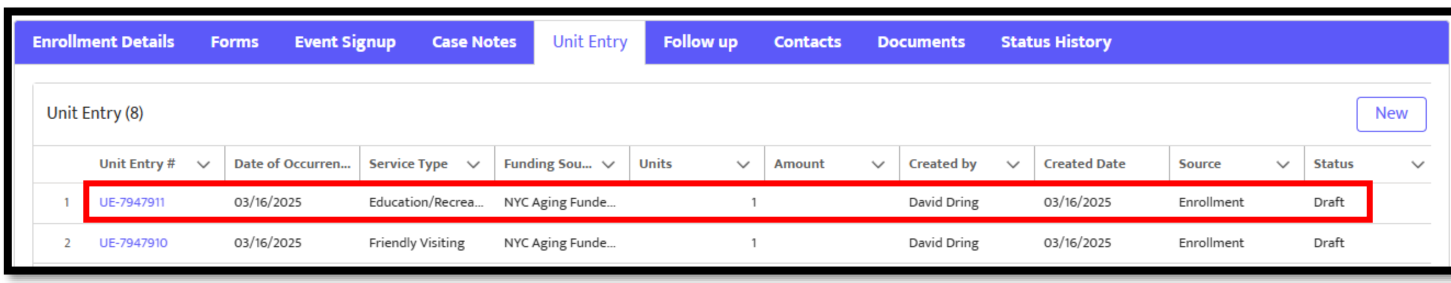
From the **Enrollment Details Menu** you are editing units specific to your client. You can only edit draft units. When units are finalized on the Monthly Unit Summary, all unit entry fields will be locked and can no longer be edited. . To unlock the Monthly Unit Summary after it has been finalized, please contact your Program Officer.

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

Step 2: From the **Details Menu**, click **Enrollment**.

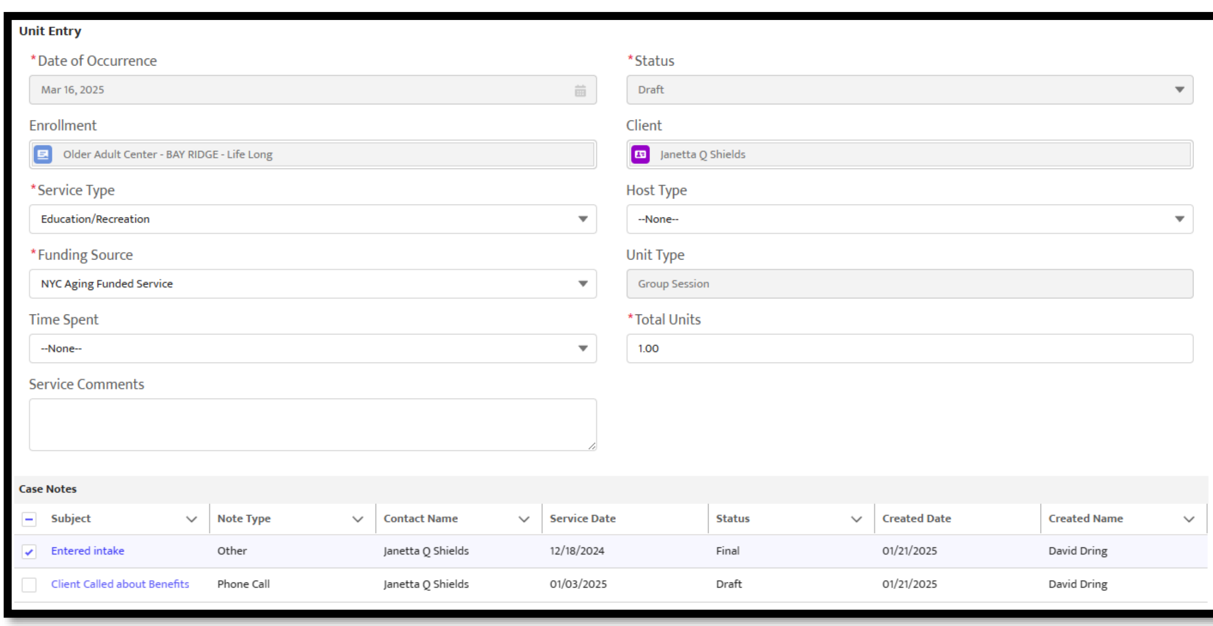
Step 3: From the **Enrollment Details Menu**, click the **Unit Entry** tab. Depending upon your window's width, you may have to select More to access Unit Entry from that dropdown menu.

Step 4: Click the Unit Entry # link of a draft unit to view the details.



Unit Entry details from the Enrollment Details Menu also includes case notes that have been written about the client. Check the box to the left of the Case Note Subject to associate the case note with this unit.

Step 5: Select the fields to edit or check /uncheck case notes to associate them with the client. Then select **Save** at the bottom of the page.



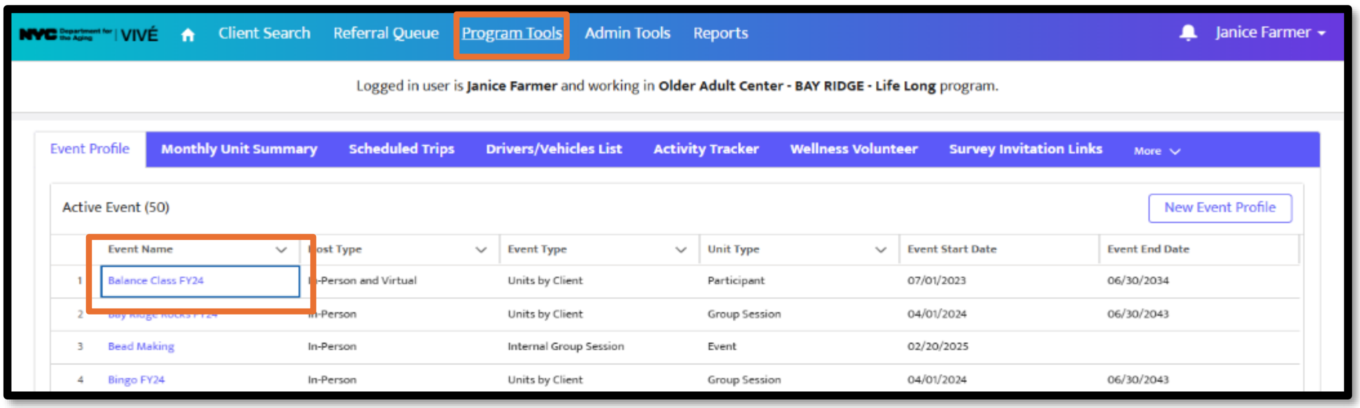
Entering Units from Program Tools

You enter event related units from Program Tools. This method is most often used when entering a group of clients to a unit, such as when they attend a class or support group. For more information on Events.

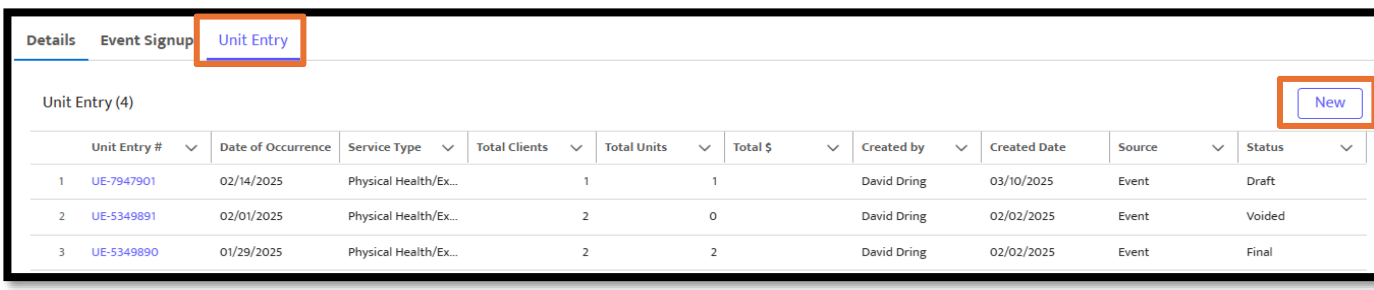
Step 1: From the **Top Menu**, click **Program Tools**.

Step 2: From **Program Tools**, click the **Event Profile** tab.

Step 3: Click a Event Name link.



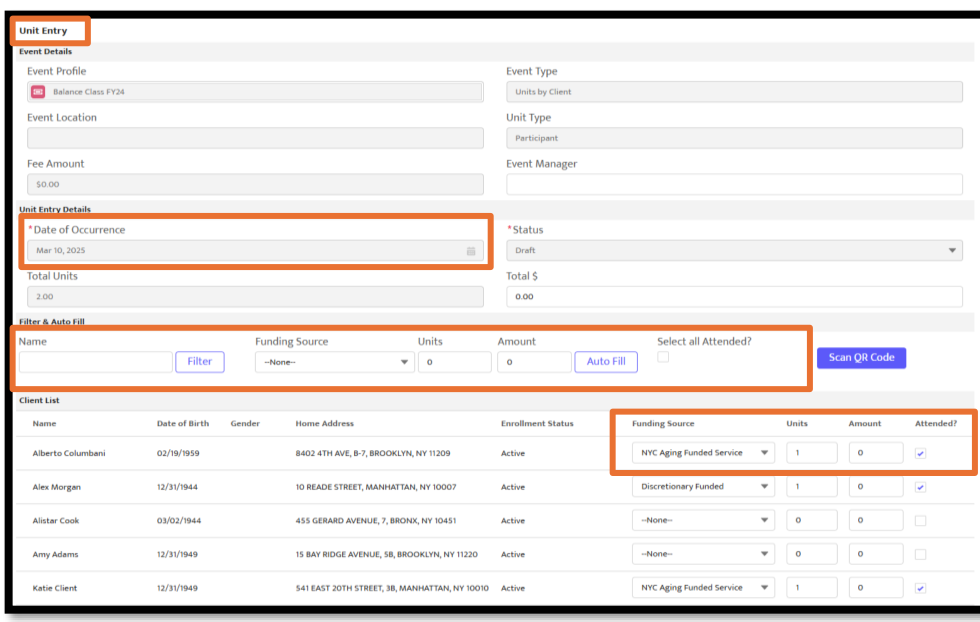
Step 4: Click the Unit Entry Link from the sub-menu. Select the **New** button.



Step 5: From the **Unit Entry** Details page, add the date the event occurred. This can be backdated.

Step 6: Either browse through the list of signed-up clients or use the filter to find the client you want to check attended.

Step 7: Either enter the units via the Auto Fill or individually for each client in attendance.

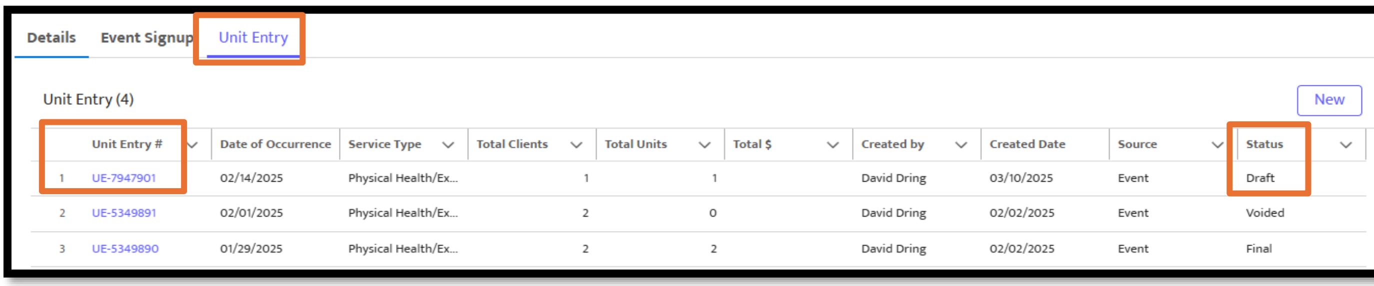


- Enter Funding Source, Units and Amount (optional) then select **Auto Fill**. Also, check the Select all Attended to mark each attended box.
- Enter the Funding Source, Units, Amount (optional) and check the attended box for each client.

NOTE: *The units will not be counted if the attended box(es) are unchecked.*

Editing an Existing Unit Entry via Program Tools

The process of editing an existing unit is similar to creating a new unit. The key difference is on the Unit Entry List view. When editing an existing, draft unit, select the Unit Entry # Link. That will take you to the above Unit Entry Details page. From there you can change the details and/or add or delete clients to the event. A Unit Entry can be changed only while its status is Draft.



	Unit Entry #	Date of Occurrence	Service Type	Total Clients	Total Units	Total $	Created by	Created Date	Source	Status
1	UE-7947901	02/14/2025	Physical Health/Ex...	1	1		David Dring	03/10/2025	Event	Draft
2	UE-5349891	02/01/2025	Physical Health/Ex...	2	0		David Dring	02/02/2025	Event	Voided
3	UE-5349890	01/29/2025	Physical Health/Ex...	2	2		David Dring	02/02/2025	Event	Final

This list view displays the Status of a Unit Entry. There are three different types:

- Draft: This unit is still editable.
- Final: The month that unit was entered has been finalized by the **Monthly Unit Summary**. Therefore, it cannot be changed. If it is essential to unlock the **Monthly Unit Summary** to edit this unit, contact your Program Officer.
- Voided: This is like deleting a unit. It cannot be edited and will no longer be counted.

Entering Units by QR Code Scanning

When entering units for events within Program Tools, you can use scan QR Codes to improve accurate unit reporting. For more information on QR Code Scanning.

Anonymous Unit Entry

Only Information & Referral and Meals can be entered anonymously through the **Event Profile** feature (see the VIVÉ Reference Guide: Event.**) DO NOT CREATE ANONYMOUS CLIENTS**.

Voiding a Unit

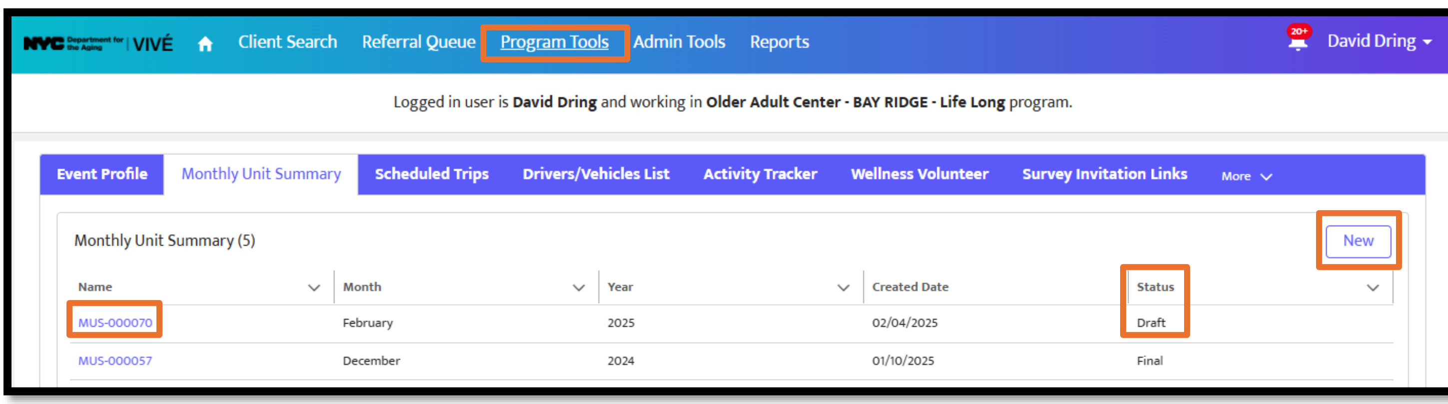
The process of voiding a unit is similar for all three pathways to unit entry. However, units can only be voided if they are in the draft status. Once a Monthly Unit Summary is finalized units cannot be voided. At the bottom of each Unit Entry details page, is a **Void Unit** button. Select it and the unit is voided.

NOTE: *Once a unit is voided it cannot be edited. Therefore, it cannot be un-voided. If you need that unit, a new one would need to be created.*

Monthly Unit Summary

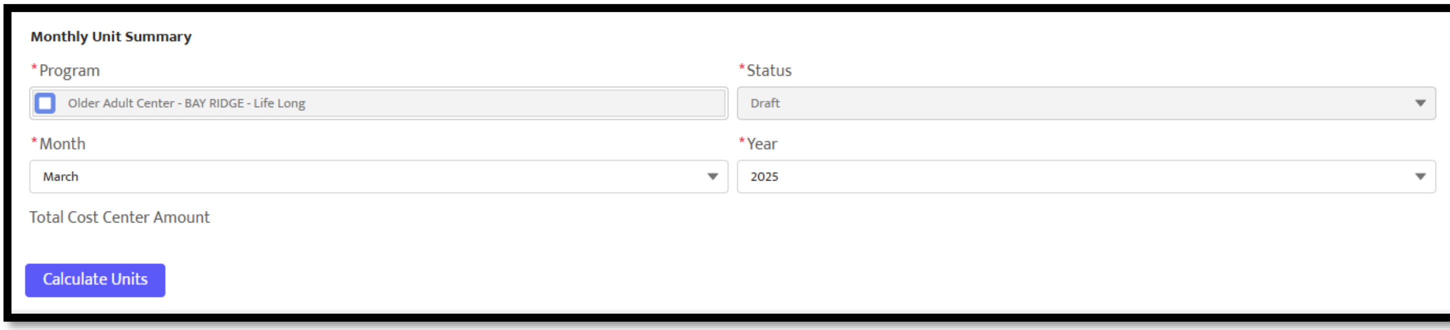
The Monthly Unit Summary reports the summary of units recorded in a month. Once you have confirmed these amounts, then you must finalize the report. ***Once a report is finalized, units can no longer be entered or edited. If you need to unlock a Monthly Unit Summary, contact your program officer.***

Step 1: From the **Top Menu**, click on **Program Tools**. Then click on **Monthly Unit Summary**.



Step 2: Click on either a draft Name link or the **New** button.

Step 3: If you select the **New** button, you must select the month and year. Then calculate the units for that period.



If you select an existing Monthly Unit Summary, then you'll be able to see the units collected for that period. If there are additional units that need to be added, there is a Recalculate button, to confirm that all recent entries are included in that month's totals.

NOTE: *Once a report is finalized, there can be no more additions, deletions or other changes. If you need to make any changes, contact your program officer.*

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