



JUNE 27, 2025

VIVÉ REFERENCE GUIDE

CAREGIVER



Welcome to the Detailed VIVÉ Reference Guide on CAREGIVER

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 detailed navigational and functional instructions on using the CAREGIVER module of VIVÉ. It is a composition of smaller topic-specific reference guides. There are additional instructional tools within the VIVÉ Knowledge Base including, detailed reference guides on other programs, short reference guides on functional activities and videos. (For more information on the [VIVÉ Knowledge Base](#).)

This Table of Contents spans across the topical reference guides as well as a program specific guide. There are links that speed your navigation through the document.

- **VIVÉ Caregiver Reference Guide**
 - [Programmatic Flow Diagram for Caregiver Programs](#)
 - [Caregiver Intake](#)
 - [More on Contacts](#)
 - [Caregiver Program Assessments](#)
 - [Core Caregiver Assessment Processes](#)
 - [Accessing Case Management Assessment Forms](#)
- **The VIVÉ NYC.ID Reference Guide**
 - [Logging into VIVÉ](#)
 - [Accessing NYC.ID](#)
- **Using the VIVÉ Client Search Reference Guide**
 - [Client Search Overview](#)
 - [Client Search](#)
 - [New Client Entry](#)
- **Using the VIVÉ Consent Reference Guide**
 - [Consent Overview](#)
 - [Consent to Collect Data](#)
 - [Uploading Consent Documentation](#)
 - [Consent Notifications](#)
 - [Consent to Refer and Share](#)
 - [Consent Revocation](#)
- **The VIVÉ Client Profile Reference Guide**
 - [Client Profile Overview](#)
 - [Details Tab](#)
 - [General Comments Tab](#)
 - [Program History Tab](#)
 - [Profile Update History Tab](#)
 - [Inactivating a Client](#)
- **The VIVÉ Enrollments Reference Guide**
 - [Overview of Enrollments](#)
 - [Navigating Enrollments](#)
 - [Creating Enrollments](#)
 - [Enrollment Details Menu](#)

- [Enrollment: Additional Features](#)
- [Closing Enrollment](#)
- **The VIVÉ Case Notes Reference Guide**
 - [Case Notes Overview](#)
 - [Entering Case Notes](#)
 - [Editing Case Notes](#)
 - [Finalizing Case Notes](#)
 - [Printing Case Notes](#)
 - [Linking Case Notes to Units](#)
- **The VIVÉ Unit Entry Reference Guide**
 - [Overview of Unit Entry](#)
 - [Editing Existing Units from Details Menu](#)
 - [Entering Units via the Details Menu](#)
 - [Entering Units from the Enrollment Details Menu](#)
 - [Editing Units from Enrollment Details Menu](#)
 - [Entering Units from Program Tools](#)
 - [Editing an Existing Unit Entry via Program Tools](#)
 - [Entering Units by QR Code Scanning](#)
 - [Anonymous Unit Entry](#)
 - [Voiding a Unit](#)
 - [Monthly Unit Summary](#)
- **The VIVÉ Contacts Reference Guide**
 - [Overview of Contacts](#)
 - [Navigating to Contacts](#)
 - [Entering in New Contacts](#)
 - [Editing Contacts](#)
 - [Inactivating Contacts](#)
- **VIVÉ Events Reference Guide**
 - [Creating Events](#)
 - [Signing up Clients for an Event](#)
 - [Event Unit Entry](#)
 - [Entering Anonymous Units for Events](#)
 - [Monthly Unit Summary](#)
- **The VIVÉ Referral Guide**
 - [Overview of Referrals](#)
 - [Viewing Referrals](#)
 - [Referral Details](#)
 - [Making a Referral](#)
- **VIVÉ Dashboard Reference Guide**
 - [A Dashboard Overview](#)
 - [My Enrollments](#)
 - [My Follow-Ups](#)
 - [My Tasks](#)
- **The VIVÉ Documents Reference Guide**
 - [Overview of Documents](#)
 - [Navigating to Documents](#)

- Adding Documents
- Viewing / Editing Documents
- **VIVÉ Admin Tools Reference Guide**
 - Accessing Admin Tools
 - Viewing Users
 - Creating a New User
 - Editing a User
 - Inactivating a User from a Program Association

VIVÉ Caregiver 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 instructions on using the **Caregiver** module in VIVÉ. Follow the links below to access sections of this document or external references.

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 contact to your program officer or view [NYC Aging's Program's Standards](#).

In this guide you will learn about:

- **Programmatic Flow Diagram for Caregiver Programs**
- **Caregiver Intake**
- **More on Contacts**
 - Specific to Caregiver Program Assessments
- **Caregiver Program Assessments**
- **Core Caregiver Assessment Processes**
 - Creating an Assessment
 - Editing Forms
 - Example of List View Forms
 - Example of Page View
 - Listing of the Different Forms and their View
 - Creating a New Form
 - Completing an Assessment
 - Next Reassessment Date
 - Cloning Assessment
 - Inactivating an Assessment
- **Accessing Case Management Assessment Forms**

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

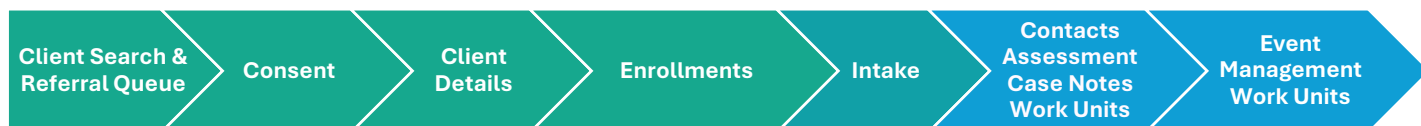
In addition to the program specific instructions, there are the following common guides:

- | | | |
|--|-------------------------------|---------------------------------|
| • Basic Navigation | • Contacts | • Glossary |
| • Case Notes | • Dashboard | • Notifications |
| • Client Profile | • Documents | • NYC.ID Login |
| • Client Search & Initial Data Entry | • Enrollments | • Referrals |
| • Consent | • Events | • Reports |
| | • Follow-Up | • Unit Entry |

Programmatic Flow Diagram for Caregiver Programs

The following flow diagram illustrates the navigation processes for key aspects of your work. This diagram provides a general overview of the steps involved in completing key tasks, while also showcasing the various sections of VIVÉ.

Caregiver Main Flow Chart



The diagram above illustrates the main steps involved in working with a new caregiver client. You can move through these steps sequentially, and once completed, you can revisit any section as needed.

The first four parts of this flow are common functions and links to those guides are listed above.

Caregiver Intake

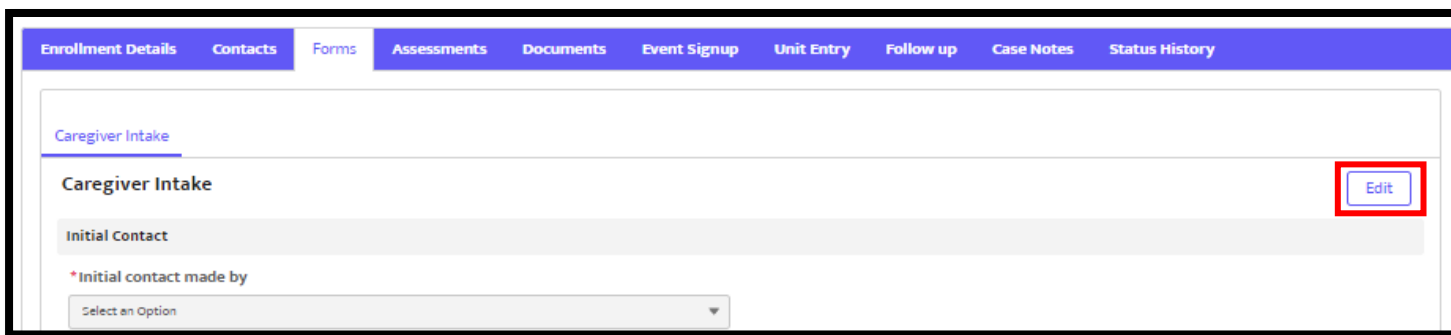
After you have enrolled the client into your program, you should complete the Intake process by collecting specific programmatic information.

Step 1: From the **Enrollment Details Menu**, click on **Forms**. There is only one form: **Caregiver Intake**.

The screenshot shows the VIVÉ system interface for a caregiver client. At the top, there is a header bar with the text "Enrollment Caregiver - Lenox Hill" and three buttons: "Assign Worker", "On Hold", and "Closing Enrollment". Below the header, there is a section for "Contact" and "Assigned To" with the names "Len Bernstein" and "Nancy Nybergh" respectively. A horizontal menu bar contains several options: "Enrollment Details", "Contacts", "Forms", "Assessments", "Documents", "Event Signup", "Unit Entry", "Follow up", "Case Notes", and "Status History". The "Forms" option is highlighted with a red box. Below the menu bar, there is a search bar with the text "Caregiver Intake" entered.

NOTE: If you have questions about the three buttons (Assign Worker, On Hold, Closing Enrollment) at the top right of the page, please consult the [Enrollment reference guide](#).

Step 2. Select on the **Edit** button to begin or make changes. The **Edit** button is also at the bottom.



After entering or editing all of the required fields, there are three actions.

- **Reset:** A pop-up box will ask you to confirm that you want to clear all the information entered
- **Cancel:** Does not save any information and returns to previous form.
- **Save:** The information entered is saved and you remain on the page.



More on Contacts

Contacts within the Caregiver Program are different. Below are instructions specific to the Caregiver program that are in addition to those within the common ([For more information on Contacts.](#))

The **Contacts** tab is located on both the **Details** and **Enrollment Details** menus. To help streamline navigation during the completion of certain sections of the assessment (e.g., care receiver being assessed, IADL/ADLS and caregiver support), it is suggested that contacts be added **prior** to accessing the assessment form.

Specific to Caregiver Program Assessments

The Care Receiver assessments use the Contact module to access the names of the care recipient. You will be unable to start an assessment without first entering contact information.

TIP: *Ensure that care receivers are entered as the care receiver type. Contacts designated this way enables the completion of assessments.*

Caregiver Program Assessments

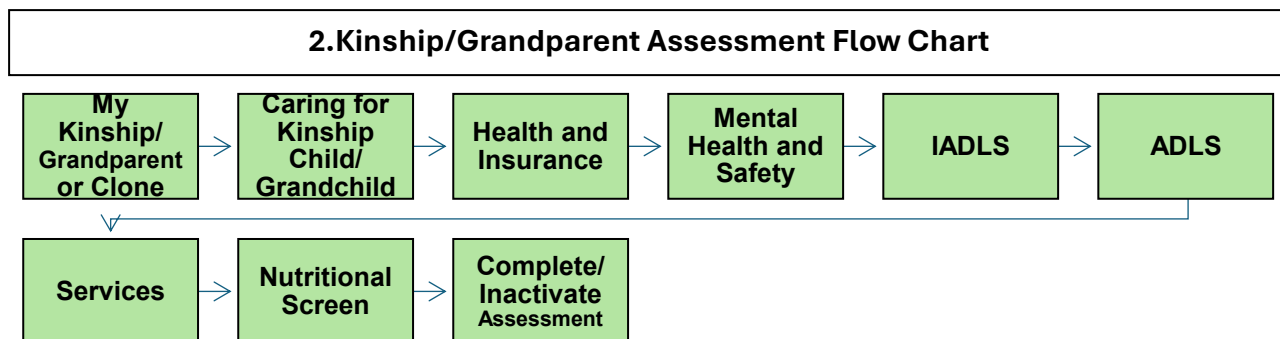
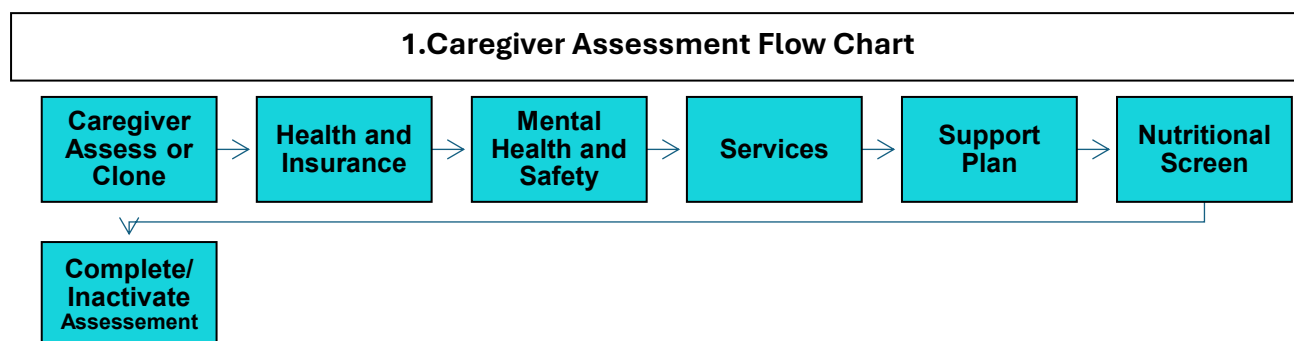
The heart of the Caregiver Program is managed within the Assessment Section. Once you have enrolled ([For more information on Enrollment.](#)) your client, you have access to both your Caregiver Program and Case Management Assessments.

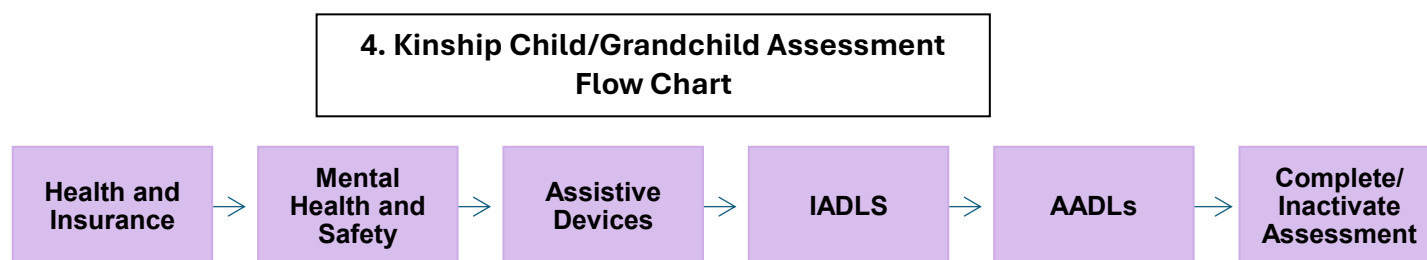
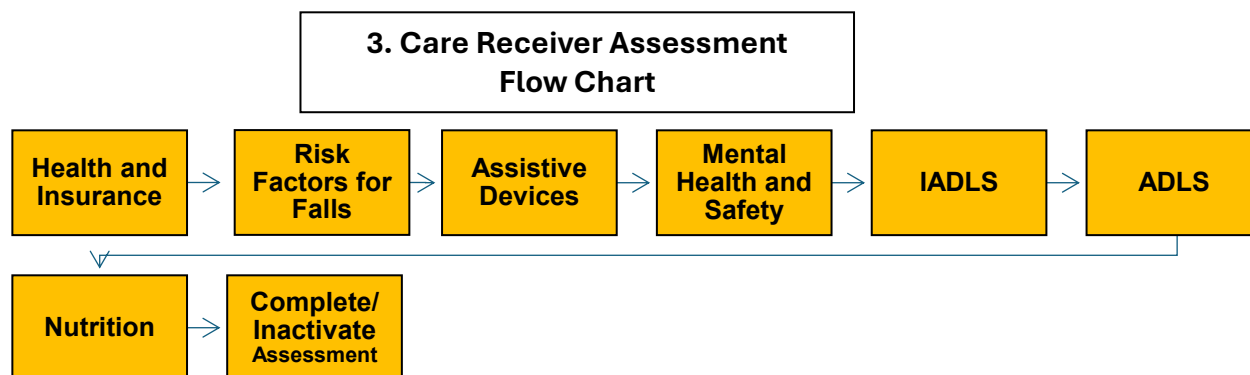
An assessment is a collection of completed forms. There are two parts of an assessment: the details and forms. The details include when the assessment was created, by whom and its status. The forms are different based upon who is the one being assessed (e.g. caregiver vs. care recipient). There are three different status types for assessments: pending, completed and inactive (Nothing is ever

deleted, it's inactivated). Only pending assessments can be edited. The completed status allows you to track your client overtime. There is a cloning feature that streamlines the reassessment process.

For the different types of people being assessed, there are 4 different assessment flows:

1. Caregiver
2. Kinship/Grandparent
3. Care Receiver
4. Kinship Child/Grandchild





Core Caregiver Assessment Processes

While the forms are different depending upon whom is being assessed, the process is the same: create, edit, and clone assessments. The forms are structured in two different styles: form view or list view.

Creating an Assessment

Step 1: From the Enrollment Details menu click on the Assessments tab.

Step 2: Select the **Create Assessment** button to begin the process.

The screenshot shows the 'Enrollment' page for 'Caregiver - JCC OF SI - Staten Island'. At the top right are buttons for 'Assign Worker', 'On Hold', and 'Closing Enrollment'. Below this, the 'Contact' is 'George Burnett' and 'Assigned To' is 'Nancy Nybergh'. A navigation bar includes 'Enrollment Details', 'Contacts', 'Forms', 'Assessments' (selected), 'Documents', 'Event Signup', 'Unit Entry', 'Follow up', 'Case Notes', and 'Status History'. Under the 'Assessments' tab, there is a search bar and a 'Create Assessment' button highlighted with a red box. Below this is a table with columns: 'Assessment Name', 'Assessment Type', 'Assessment Reason', 'Assessment Status', 'Assessment Start ...', 'Program Name', and 'Own/Shared Form'.

Step 3: From the Create Assessment pop-up, complete the required fields. It is important to pick the appropriate Assessment Type.

Assessment Type: Pick among the four types: Caregiver, Kinship/Grandparent, Care Receiver, or Kinship Child/Grandchild.

Assessment Reason: Either Initial or Follow Up.

Assessment Date: The Assessment can be today or earlier; future dates are not allowed.

NOTE: Only one assessment can be pending per type of assessment. If you need to create another assessment of the same type, you must first change the Assessment Status to completed.

Step 4: View the Assessment Details, then click Forms. The forms will be different depending upon the Assessment Type. Complete the form and select **Save**.

Editing Forms

The forms are structured in two different styles: form view or list view. Therefore, there are two different editing methods. Page view is a single form that when edited overwrites the previous entry. List view forms display a list of the forms entered providing historical details on the client. When editing a list view form, click on the form link id to access the form details.

Example of List View Forms

List view forms have multiple options after you have viewed or edited the page. They are:

- **Reset:** A pop-up box will ask you to confirm that you want to clear all the information entered.
- **Cancel:** Does not save any changes and reverts to the last version of the saved form.
- **Save:** The information entered is saved and you stay on the form.
- **Save & Exit:** The information entered is saved and you are returned to the list view.

Example of Page View

Once clicking the link of a Page View form, its details appear. Select the **Edit** button to begin.

After editing, there are three actions: Reset, Cancel and Save.

Listing of the Different Forms and their View

List View	Page View
• Services* • Assistive Devices	• Health and Insurance • Mental Health and Safety • ADLs • IADLS • Support Plan • Nutritional Screen

	• Risk Factors for Falls • Caring for Kinship Child/Grandchild
--	---

* Starts with Conditional Question

Creating a New Form

You can create as many new forms as you would like for your assessment. The process is similar to editing forms. Rather than clicking on an existing link, select the **New** button. Once within the form, you will need to select **Edit** whether you're entering data for the first time or revisiting the form.

Assessment Details		Forms				
		Health and Insurance	Mental Health and Safety	Assistive Devices	IADLS	ADLS
Assistive Devices (1)		New				
Sr. No.	Assistive Devices	Does the client	Assessment ID	Created Date	Own/Shared Form	
1	AD - 2655	Grab Bars	Has Device	AS-00821	03/30/2025	Own Form

Completing an Assessment

Once you have finished editing each of the forms, you should complete the assessment.

Step 1: From the Enrollment Details Menu, click Assessments.

Step 2: From the **Assessment Details** page, click the pencil icon next to the **Assessment Status** field. Pick **Completed** from the list of status options.

NOTE: Once an assessment has the status of completed, a reassessment due date is calculated and none of the forms will be editable. There will no longer be an **Edit** button on any of the pages.

Enrollment Details

Forms

Assessments

Event Signup

Case Notes

Unit Entry

Follow up

Contacts

Documents

Status History

Assessments (5)

Create Assessment

Assessment ID	Assessment Type	Assessment Reason	Assessment Status	Assessment Start Date	Program Name	Own/Shared Form
1 AS-19776	Kinship/Grandparent Caregiv...	Initial	Completed	03/03/2025	Caregiver - JCC OF SI - Staten...	Own Form
2 AS-00821	Care Receiver Assessment	Initial	Pending	01/30/2025	Caregiver - JCC OF SI - Staten...	Own Form

Next Reassessment Date

The next reassessment date will be calculated for you once you mark an assessment as completed. As the next reassessment date gets closer, you will receive a notice in your "My Tasks." ([For more information see Dashboard.](#))

Cloning Assessment

The cloning process duplicates previously entered assessment information speeding up the process by reducing redundant data entry. You can clone any completed assessment.

Step 1: From the Enrollment Details Menu, click the Assessments tab.

Step 2: Click on the **Assessment ID** link of a completed assessment to clone.

Step 3: From the Assessment Details, select the Clone Assessment button.

Step 4: A pop-up will appear confirming your intent to clone. A new assessment will appear on the list with the Assessment Reason = Follow up.

Assessment AS-19776

Linked Enrollment: Caregiver - JCC OF SI - Staten Island

Contact: George Burnett

Assigned To: Nancy Nybergh

Assessment Details | Forms

Assessment ID: AS-19776

Assessment Reason: Initial

Assessment Start Date: 3/3/2025

Clone Assessment

If you clone this assessment, a new assessment will be created for the client with pending status. Are you ready to clone this assessment?

Cancel Yes

Inactivating an Assessment

Follow the same instructions as Completing an Assessment but change the status to Inactive. You can change the status from Inactive to Pending or Completed. Once Inactive, the client will no longer appear in any reports nor will the assessment or any of its forms be editable.

Accessing Case Management Assessment Forms

You can view assessments from your Case Management Agency in a read-only format to better understand your client's situation. ([For more information on Case Management.](#))

Step 1: From the Enrollment Details Menu, click the Assessments tab.

Step 2: Note there is an Assessment ID (AS-19778) with Assessment Type = Case Management Assessment and Program Name = Case Management – CASC – CMA.

Enrollment Details	Forms	Assessments	Event Signup	Case Notes	Unit Entry	Follow up	Contacts	Documents	Status History
Assessments (7)									
Create Assessment									
Assessment ID	Assessment Type	Assessment Reason	Assessment Status	Assessment Start Date	Program Name	Own/Shared Form			
1 AS-19778	Case Management Assesse...	Initial	Completed	03/04/2025	Case Management - CASC - CMA	Shared Form			
2 AS-19777	Kinship/Grandparent Caregiv...	Follow up	Pending	03/30/2025	Caregiver - JCC OF SI - Staten Island	Own Form			

Step 3: Click on that **Assessment ID** link to view the Case Management Agency's work with the client.

From there you will be able to review a host of Care Management Forms:

VIVÉ Knowledge Base - Caregiver

• Client Information	• NSI	• Assistive Devices
• Emergency Checklist	• Nutrition	• ADLs
• Technology	• CAGE	• IADLs
• Health Care	• Psycho-Social Status	• Benefits & Entitlements
• Medical Information	• Loneliness Scale	• Current Services
• Home Safety Checklist	• Medication List	• Caregiver Support Status
• Legal Information	• Risk Factors for Falls	

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.

The VIVÉ NYC.ID 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 and viewing **NYC ID**.

NYC ID are the credentials that allow you to access New York City government's systems and network, such as VIVÉ, which is behind NYC's Firewall. You may be familiar with NYC ID as it is also used to access PASSPort. NYC ID is managed by NYC Office of Technology (OTI) and Innovation, not by NYC Aging.

This guide provides an overview. Specific questions should be made by submitting a ticket to OTI. This guide may also be accessed from the VIVÉ Knowledge Base. At the beginning and end of this document is a link to return to the [VIVÉ Knowledge Base](#). Users can also use their browser's back button to return to the program reference guide.

In this guide you will learn about:

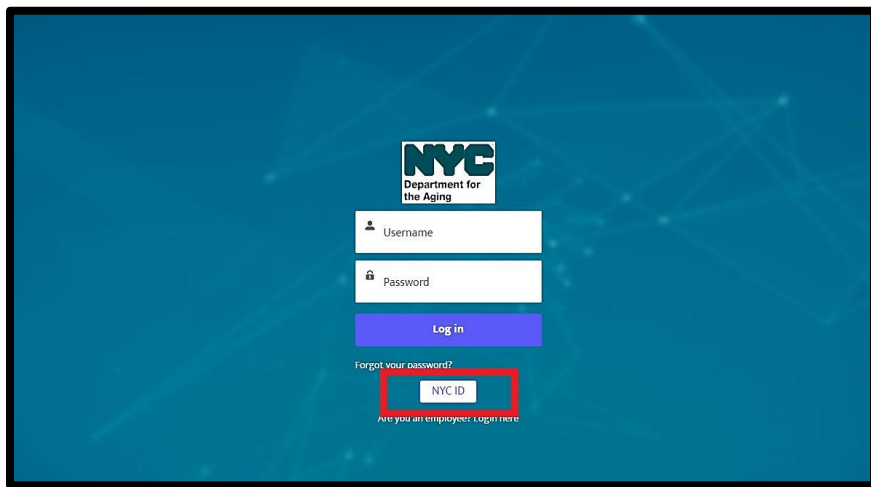
- [Logging into VIVÉ](#)
- [Accessing NYC.ID](#)

If you have any questions, please [report an issue](#) to NYC Office of Technology & Innovations.

Logging into VIVÉ

To log into VIVÉ, enter your NYC.ID email or username and your NYC.ID password, then click the Log In button.

Note: NYC.ID is different from an IDNYC. Don't have an NYC.ID? You must create an NYC.ID account to use VIVÉ.



Accessing NYC.ID

From the VIVÉ login screen, click on the **NYC ID** button or you can access NYC.ID from this [link](#). That link will present the page below. From this page you can:

- Login with a NYC ID account or with the other email options listed.
- Get help with your password
- Create an account

- Report an issue, such as inability to login.

The Official Website of the City of New York

NYC

Login

Log in using your NYC account

Email Address or Username *

Password *

Login

Log in using one of these options

NYC Employees

Microsoft

Google

LinkedIn

Yahoo

or

[Forgot Password](#)

[Create Account](#)

[Report an Issue](#)

WARNING: This system and network belong to the City of New York and are intended solely for users and uses authorized by the City of New York. Unauthorized access or use is strictly prohibited. By using this system you expressly consent to the City of New York monitoring all use of this system, regardless of the purpose. If monitoring reveals possible evidence of criminal activity, damage or other unauthorized use, the City of New York may provide that evidence to law enforcement or others. Systems and networks accessed or used may be subject to additional terms and policies.

TIP: Best to use your work email address when creating an NYC.ID login.

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**.

Using the VIVÉ Client Search 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 conducting client searches in VIVÉ.

Client Search 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 Programs' Standards](#).

In this guide you will learn:

- **Client Search Overview**
- **Client Search**
 - From the dashboard, click Client Search.
- **New Client Entry**

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

Client Search Overview

Client Search allows you to search for clients in VIVÉ. Starting with a client search is an important first step in preventing duplicate client records as well as inaccurate client data entry. VIVÉ offers several ways to search for clients, this guide will go over these different approaches and the next steps in the new client entry process.

NOTE: DO NOT ENTER ANYONYMOUS CLIENTS as anonymous clients are not permitted. All client records must include identifying information. If the person's information is not available, you may still record the unit in the Event Profile—consult the [VIVÉ Reference Guide: Event](#).

Client Search

Beginning Your **Client Search**

From the dashboard, click **Client Search**.



Indicate if you are searching for a Client, a Contact, or a Professional by checking the box.

To begin the client search you can either:

- Use intelligent search for the client by name:
 - You can enter first name within the last name field.
- You can enter a nickname. Entering Bob will find clients named Robert.
- Search for the person by their address:
 - Checking the **Search by address box** button and the address fields will appear.
- Or you can select to Scan QR Code (more information on [QR Codes](#))

*** Contact Type**

☒ Client
 ☐ Contact
 ☐ Professional

*** Contact Type**

☒ Client
 ☐ Contact
 ☐ Professional

First Name

Last Name

Date of Birth

Client ID

Phone

Email

☐ Search by address?

Search

Scan QR Code

If the person you are looking for is on the list, click on the client's name. This opens the client's profile.

Client ID	Name	Contact Ty...	Date of Birth	Phone	Email	Related Co...	Home Add...	Work Add...
1501409794	Chisackal Masy J...	Client	12/16/1944				86-38 188TH ST...	
1500592175	Chin Yueh Joyce ...	Client	03/25/1950				231-25 BAY STR...	
1500592163	Tso Long HSU	Client	10/30/1940			Chin Yueh Joyce...	231-25 BAY STR...	

If the person is not on the list, check the box at the bottom of the page to confirm you have reviewed the results and there is no match. Then click the **New Client** button, to start the new client data entry process.

To enable the 'New Client' button, confirm that no matching result was found.

☒ Yes, I have reviewed the results and confirm there is no match

New Client

New Client Entry

Before entering a new client, the system prompts for confirmation of having obtained Consent to Collect Information. (For more information on [Consent](#).)

The First Name, Last Name, Date of Birth and Home Address are all required fields. These fields are used to check for duplicates. The preceding red asterick (*) indicates that they are required.

To find addresses, there is a search box for the Home Address. Enter an address and if it was previously entered, then you can select it. Please note the address including the apartment number must match.

If the client's address is not already in the system, click on the **New Address** link.

A **New Address** pop-up window will appear. Enter the complete address in the first line. This uses type-ahead technology, so as you're typing the address may appear.

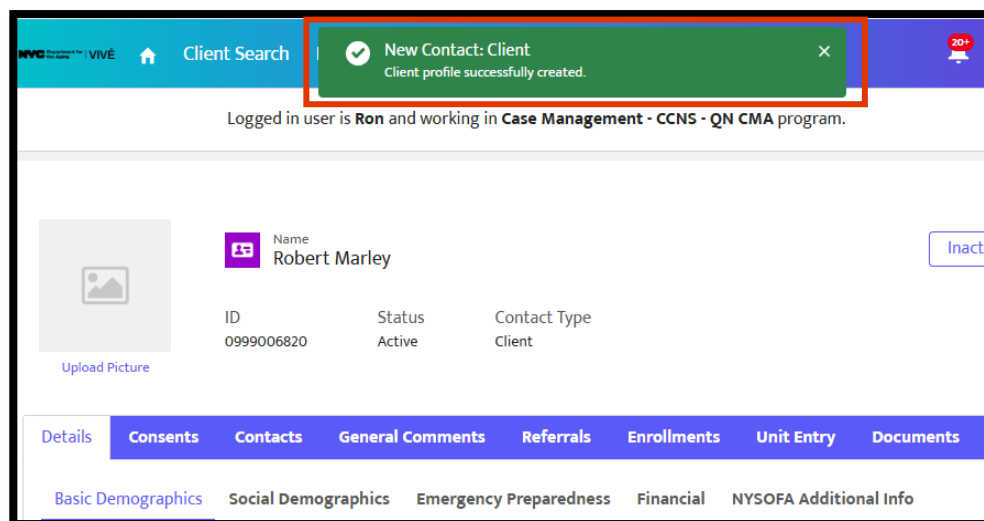
Once you've selected the address, the remaining fields will be populated. **You will need to add the Apt/Unit field.**

This process geo-codes the address to automatically identify the Community District, Council District, and exact location for Home Delivered Meal route creation.

VIVÉ Knowledge Base – Client Search

Once you are finished entering the client's details select the **Save** button.

You will see a pop-up indicating you successfully added a new client and you will be taken to the **Client Profile** section in VIVÉ. (For more information [Client Profile](#).)



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**.

Using the VIVÉ Consent 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 documenting informed **Consent**.

Consent is a common functionality within 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 the program reference guide.

This guide will review:

- **Consent Overview**
- **Consent to Collect Data**
 - New Client Without an Existing Profile in VIVÉ
 - New Client with an Existing Profile in VIVÉ
- **Uploading Consent Documentation**
- **Consent Notifications**
- **Consent to Refer and Share**
- **Consent Revocation**

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

Consent Overview

This reference guide provides VIVÉ navigation instructions for the **Consent** functions that enable you to confirm and upload documents to the client's file.

This document **is** intended to guide you through these consent-related processes in VIVÉ - from a navigational perspective.

This document **is not** intended to provide guidance on any NYC Aging policies or program-specific requirements. For guidance regarding your program's specific policies and requirements, please consult:

- Your NYC Aging Program Officer
- Official NYC Aging and Program-Specific "Standards of Operation"

Consent to Collect Data

Consent must be received and documented prior to creating, viewing, or editing any information in a client's profile. VIVÉ will prompt you to confirm that you have received this consent whether you are:

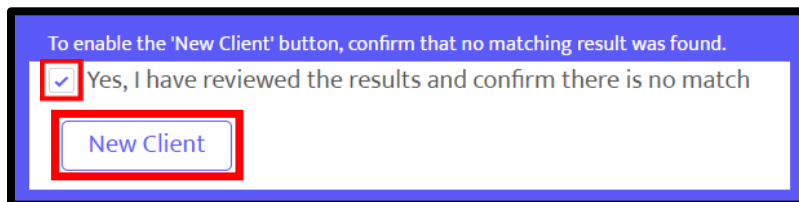
Accessing, updating, or editing information on a client with an existing profile in VIVÉ (e.g. a new client with your program who is/was a client of another NYC Aging-funded program).

NOTE: Unless revoked by the client, you will only be prompted to document and unload consent once.

New Client Without an Existing Profile in VIVÉ

Step 1: Click on **Client Search** from the **Top Level Menu** to search for your client.

Step 2: If your client does not appear in the search results, at the bottom of the page, you will be prompted to confirm this fact prior to selecting **New Client**.

A blue-bordered dialog box with a white background. At the top, it says "To enable the 'New Client' button, confirm that no matching result was found." Below this is a checkbox with a checkmark and the text "Yes, I have reviewed the results and confirm there is no match". At the bottom is a button labeled "New Client".

To enable the 'New Client' button, confirm that no matching result was found.

☒ Yes, I have reviewed the results and confirm there is no match

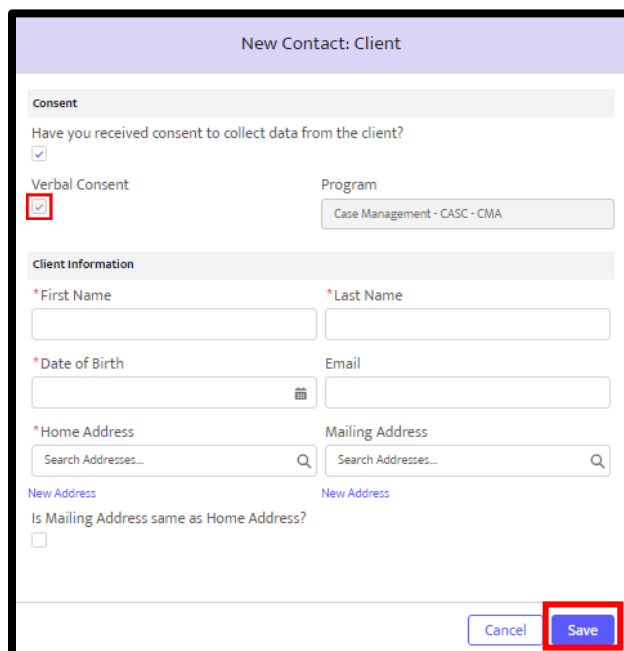
New Client

Step 3: In the **New Contact: Client** pop-up window you must first indicate that you have received consent to collect data from your client by checking the box.

Then the fields for First & Last Name, Birthday and Address, among others will appear.

Step 4: Complete the required fields before selecting **Save**.

NOTE: The Verbal Consent check box will be marked by default. It will remain marked as such until documentation is uploaded (this process is covered later in this guide).

A form titled "New Contact: Client". It has sections for "Consent", "Client Information", and "New Address". The "Consent" section has a checkbox "Have you received consent to collect data from the client?" which is checked. Below it is a "Verbal Consent" checkbox, also checked. To the right of "Verbal Consent" is a "Program" dropdown menu showing "Case Management - CASC - CMA". The "Client Information" section has fields for "First Name", "Last Name", "Date of Birth", "Email", "Home Address", and "Mailing Address". The "Home Address" and "Mailing Address" fields are search boxes. At the bottom, there is a checkbox "Is Mailing Address same as Home Address?" and two buttons: "Cancel" and "Save".

New Contact: Client

Consent

Have you received consent to collect data from the client?

☒

Verbal Consent ☒

Program

Case Management - CASC - CMA

Client Information

* First Name

* Last Name

* Date of Birth

Email

* Home Address

Mailing Address

Search Addresses... Search Addresses...

New Address

Is Mailing Address same as Home Address?

☐

Cancel Save

New Client with an Existing Profile in VIVÉ

The intelligent search of VIVÉ returns robust results. When you click on a client's name who is not yet your client, you will first need to obtain their consent to view their record.

Step 1: Click on **Client Search** from the **Top Level Menu** to conduct your search.

Step 2: Click on the desired name from the search results list.

Step 3: Once in the client's profile, you must click the **Consents** tab and select **New**.

Client Profile: CMA Client

ID: 0999001790 | Status: Active | Contact Type: Client

Consents

Consents (0) New

Number	Consent Status	Consent Type	External Agency	Is Global Consent?
--------	----------------	--------------	-----------------	--------------------

Step 4: When the pop-up window appears, select “Consent to Collect Data” from the consent type dropdown and click “Save”

New Consent

Client: CMA Client

* Consent Type: **Consent To Collect Data**

Consent Status: Active ☒ Verbal Consent

Program: Program Name

Cancel Save

NOTE: Verbal Consent will automatically be selected. The consent status will change to Written Consent only after you have uploaded the written documentation.

Uploading Consent Documentation

Not all programs must obtain written consent. This process illustrates the process for those that do.

Step 1: Navigate to the **Consents** tab of your client’s profile

Step 2: Click on the consent record for which you would like to upload written consent. The first consent record will be for verbal consent. It is important that you add your written consent to that record, if you are required to obtain written consent.

Client Profile: CMA Client

Consents

Consents (1) New

Number	Consent Status	Consent Type	External Agency
1	Active	Consent To Collect Data	

Showing 1 of 1 Page(s) « First < Previous Next > Last » Total Records: 1

Step 3: Once in the consent record, select the **Add Document** button in the bottom right corner.

Consent-150578

Client: CMA Client

Consent Status: Active

Program: Caregiver - PSS - Bronx West

Consent Type: Consent To Collect Data

Verbal Consent: ☒

Signed Consent: ☐

Consent History (1)

Date	Field	User	Original Value	New Value
2/19/2025, 4:20 PM	Created	Ash Abbott		

Documents (0)

Add Document

Exit

Step 4: From the **Add Document** pop-up, complete the required fields.

Pick an appropriate **Document Type**.

Pick **Access Level** either Program Level or All Programs.

Give your document an easy to remember name.

You will be able to confirm your upload as the file name will appear below the Upload file button

Select **Save**.

Add Document

* Document Type: Search Document Type...

* Access Level: Select an Option

* Document Title:

Status: Active

Description:

Upload Document

Upload Files Or drop files

Cancel **Save**

You will now see that the check box for Signed Consent has been automatically marked and Verbal Consent has been unchecked.

Consent-151207

Client: New Client

Consent Status: Active

Program: Case Management - NSHOPP - CMA

Consent Type: Consent To Collect Data

Verbal Consent: ☐

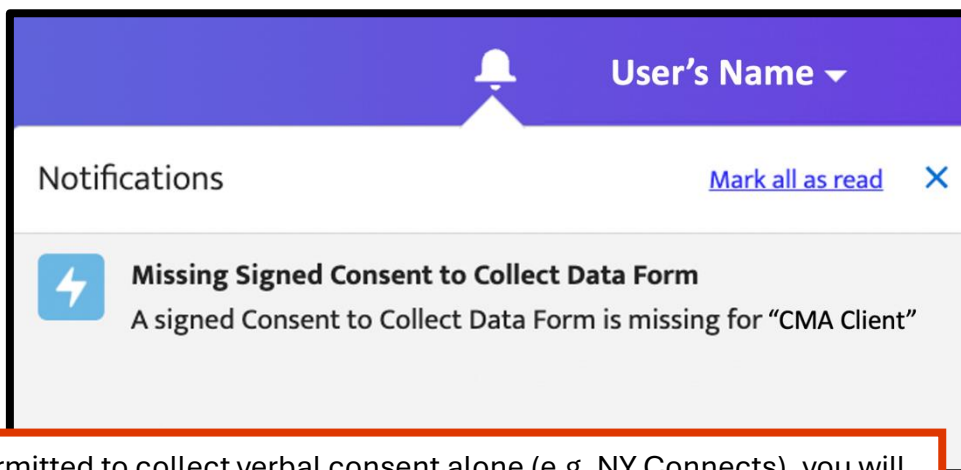
Signed Consent: ☒

Edit

NOTE: Whether you are uploading Consent to Collect or Consent to Refer, always attach the documentation to the consent record. Please do **not** upload the written consent under the **Documents** tab of the client profile.

Consent Notifications

If you create a consent record, and are required to obtain written consent, you should upload the written documentation as soon as you have it. If 30 days pass from the time you create the record, and you do not upload documentation, VIVÉ will issue a notification to remind you.



NOTE: If your program type is permitted to collect verbal consent alone (e.g. NY Connects), you will not receive these notifications.

Consent to Refer and Share

Step 1: The first time you are referring a client to another NYC Aging program, you will be prompted to **Create Consent to Refer** before you can save the referral.

For more information on the [Referral](#) process.

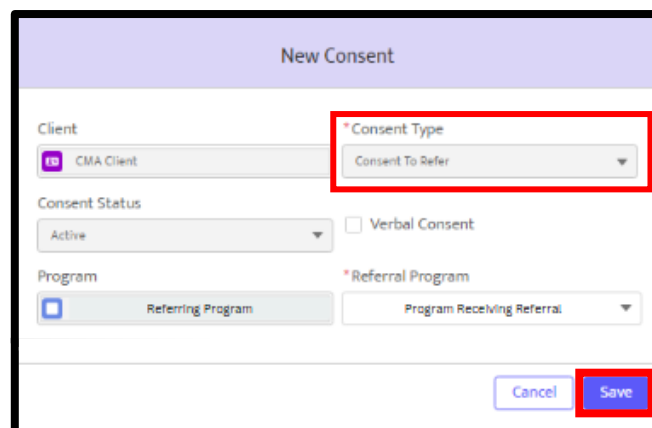
A screenshot of the "Client Referral Form" in the VIVÉ system. At the top, a red error banner states "A consent to refer is required. Please click on Create below." with a close icon. The form is titled "Client Referral Form" and shows fields for "Referral Date" (Dec 12, 2024), "Source Program" (Case Management - Program Name), and "Target Program" (Home Care - Program Name). There are sections for "Comments", "Service Requested", "Available Services" (listing Emergency Personal Care and Homemaker/Personal Care), and "Selected Services" (listing Housekeeping/Chore). At the bottom right, three buttons are visible: "Create Consent to Refer" (highlighted with a red box), "Cancel", and "Save".

Step 2: Complete the required information in the New Consent pop-up window and click save.

This New Consent pop-up is a common form. Notice now that the Consent Type has defaulted to Consent to Refer.

Step 3: You will now be able to save your consent and complete your referral.

Step 4: Upload documentation of your Consent to Refer as indicated in the previous section.



The 'New Consent' form contains the following fields:

- Client:** CMA Client
- Consent Type:** Consent To Refer (highlighted with a red box)
- Consent Status:** Active
- Verbal Consent:** ☐
- Program:** Referring Program
- *Referral Program:** Program Receiving Referral
- Buttons:** Cancel, Save (highlighted with a red box)

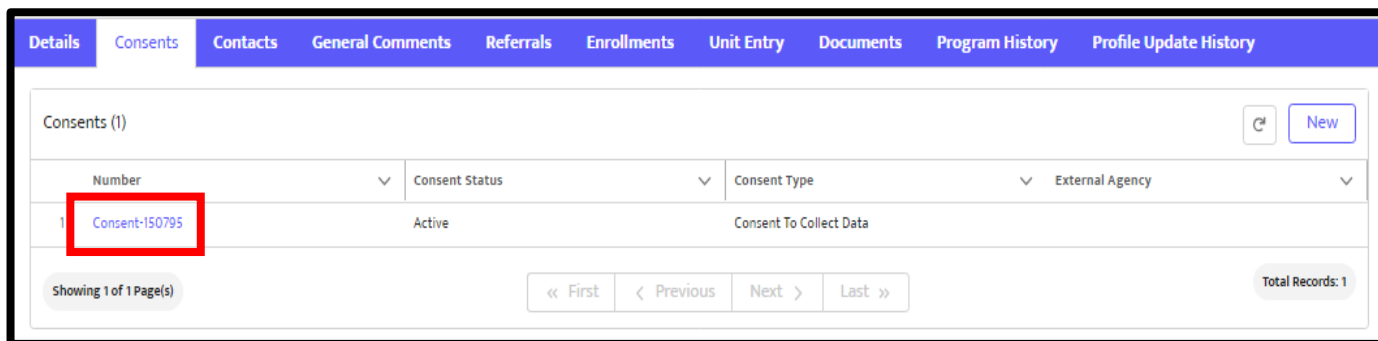
NOTE: You only need to collect a consent to refer once for a client. Each additional time you refer a client to that program; you will not need to obtain another consent to refer.

Consent Revocation

When a client indicates that they would like to revoke consent, they must sign the Consent Revocation. You will then be required to upload it the form.

Step 1: Navigate to the **Consents** tab in their client profile

Step 2: Select the Consent Record for which the client would like to revoke consent. In some cases a client may have revoked consent from one organization and not another.



Number	Consent Status	Consent Type	External Agency
1	Active	Consent To Collect Data	

Showing 1 of 1 Page(s) << First < Previous Next > Last >> Total Records: 1

Step 3: Once in the consent record, select **Edit**



Consent-150795

Client: CMA Client

Consent Status: Active

Program: Program Name

Consent Type: Consent To Collect Data

Verbal Consent: ☐

Signed Consent: ☒

Edit (highlighted with a red box)

Step 4: Update the Consent Status to Revoke

Step 5: Click the checkbox under Consent to Revoke received from client?

Step 6: Select the date that the Consent to Revoke was received. Select **Save**

The screenshot shows a web form titled "Consent" with the ID "Consent-150795". The form is divided into two main sections: "Client" and "Program".

- Client Section:**
 - Client:** CMA Client
 - Consent Status:** A dropdown menu with "Revoke" selected. This field is highlighted with a red box.
- Program Section:**
 - Program Name:** (Empty text field)
 - Consent to Revoke received from client?:** A checkbox that is checked. This checkbox is highlighted with a red box.
- Consent Type Section:**
 - Consent Type:** Consent To Collect Data
 - Verbal Consent:** An unchecked checkbox.
 - Signed Consent:** A checked checkbox.
- Date Section:**
 - * Date Consent to Revoke Received?:** A date field with "Feb 28, 2025" entered. This field is highlighted with a red box.
- Buttons:** "Cancel" and "Save" buttons are at the bottom right. The "Save" button is highlighted with a red box.

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**.

The VIVÉ Client Profile 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, editing, and viewing the Client Profile.

The **Client Profile** 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:

- **Client Profile Overview**
- **Details Tab**
 - Sub-Details: Basic Demographics
 - Sub-Details: Social Demographics
 - Sub-Details: Emergency Preparedness
 - Sub-Details: Financial
 - ☐ To Enter Income
 - ☐ To Enter Assets
 - ☐ To Enter Expenses
 - ☐ To Delete Financial Information
 - Sub-Details: NYSOFA Additional Information
- **General Comments Tab**
- **Program History Tab**
- **Profile Update History Tab**
- **Inactivating a Client**

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

Note: For Case Management Agency providers, there are specific details around referrals, entering Financial information, and inactivating clients that are addressed in the Case Management reference guide.

Client Profile Overview

The **Client Profile** is the summation of basic details, demographics, emergency and financial information. Information entered here is available throughout VIVÉ. For example, the financial information entered within the **Client Profile** is used to calculate the cost share for home care.

The **Client Profile** is the destination of any client name links whether from the **Client Search** results or from an enrollment form. If you are directed to the **Client Profile** from a **Client Search**, you may

VIVÉ Knowledge Base – Client Profile

only view basic information until you confirm that you have consent (for more information on [Consent](#)).

There are two levels to the **Client Profile**. The first is the main details and the second is a sub-category of Details.

The main level of the Client Profile includes the tabs on Consents, Contacts, General Comments, Referrals, Enrollments, Unit Entry, Documents, Program History, and Profile Update History. More information is provided on these tabs below.

The screenshot displays the VIVÉ Client Profile interface. At the top left is a profile picture of an elderly woman with glasses, labeled 'Upload Picture'. To the right, the name 'Janetta Q Shields' is shown next to a purple ID icon. A button labeled 'Inactivate Client Profile' is in the top right corner. Below the name, fields for 'Contact Type', 'Date of Birth' (3/23/1935), and 'Phone' ((212) 602-4459) are visible. A central navigation bar contains tabs: 'Details' (highlighted with an orange border), 'Consents', 'Contacts', 'General Comments', 'Referrals', 'Enrollments', 'Unit Entry', 'Documents', 'Program History', and 'Profile Update History'. Below this bar, a sub-menu for 'Basic Demographics' is active, showing fields for 'ID' (0000000103), 'Status' (Active), '*Last Name' (Shields), 'Suffix', '*First Name' (Janetta), and 'Title' (a dropdown menu currently set to '--None--'). Other sub-menu options like 'Social Demographics', 'Emergency Preparedness', 'Financial', and 'NYSOFA Additional Info' are also listed.

When a tab is clicked, such as **Details** (shown above), the background color is removed. The following tabs are accessible from the **Details Menu**.

- [Details](#) – provides access to the Sub-details menu. (see below for more information on the Sub-details menu)
- [Consent](#) – where details on the types of consent are listed, indicated, and uploaded.
- [Contacts](#) – where to search, edit, and create contacts.
- [General Comments](#) – a place to make general comments; these are not case notes.
- [Referrals](#) – where to view and make client referrals.
- [Enrollments](#) – where to enroll a client into your program, view active and inactive enrollments and manage the client's engagement with your program.
- [Unit Entry](#) – where to enter units of services offered directly to the client.
- [Documents](#) – where to upload, download, and view a list of documents
- [Program History](#) – where to see a list of programs that the client is enrolled in.
- [Profile Update History](#) – Client Details are accessible to every user of VIVÉ. This area lists the changes that anyone makes to the client's record.

Details Tab

The Details tab includes a sub-details menu of **Basic Demographics**, **Social Demographics**, **Emergency Preparedness**, **Financial** and **NYSOFA Additional Information**. Each of these sub-sections are described below.

Sub-Details: Basic Demographics

Once you have either entered a new client or used the hyperlink to get into the client's profile, the destination is **Basic Demographics**. The client's core information, such as address, age, and phone number are maintained here. These fields are editable once the user selects the **Edit** button at the bottom. First and last name, date of birth, and address are required fields (note red asterisk). Once editing, the **Save** button will appear at the bottom of the screen. Select **Save** before leaving the page.

At the bottom of the **Basic Demographics** page there is the **Edit** button (or **Save** if in editing mode) and the **QR Code**. (For more information on [QR Codes](#))



NOTE: The Community District, Council District, and Hurricane Zone are examples of fields auto-filled from entering the client's address.

Sub-Details: Social Demographics

Moving from left to right, the next sub-tab is **Social Demographics** (the underlined and highlighted word lets you know where you are in the system). This form asks questions on pets, language, race, ethnicity, gender and sexual orientation, and veteran status. To edit these fields, select the **Edit** button at the bottom. Before leaving, select the **Save** button at the bottom of the page.

The screenshot shows the 'Social Demographics' sub-tab selected in the client profile system. The top navigation bar includes tabs for Details, Consents, Contacts, General Comments, Referrals, Enrollments, Unit Entry, Documents, Program History, and Profile Update History. Below this, the sub-tabs are Basic Demographics, Social Demographics (highlighted), Emergency Preparedness, Financial, and NYSOFA Additional Info. The Social Demographics section contains several fields: 'Current Marital Status' (dropdown menu with 'Widowed' selected), 'Lives With' (dropdown menu with 'Alone' selected), 'Frail and/or disabled' (dropdown menu with '--None--' selected), and 'Number of pets owned by client' (text input field). There is also a section for 'Type of pets owned by client' with two boxes: 'Available' (containing 'Cat', 'Dog', 'Fish') and 'Chosen' (containing 'No pets').

Sub-Details: Emergency Preparedness

The Emergency Preparedness section operates differently. The first action is to confirm the client is willing to share their emergency information. To document their consent, select the **Edit** button to reveal the consent options: Yes or Refuses to Provide.

The screenshot shows the 'Emergency Preparedness' sub-tab selected in the client profile system. The top navigation bar is the same as the previous screenshot. Below it, the sub-tabs are Basic Demographics, Social Demographics, Emergency Preparedness (highlighted), Financial, and NYSOFA Additional Info. The Emergency Preparedness section contains a 'Date' field (calendar pick list with 'Jan 20, 2025' selected) and a 'Consents to share emerg prep info' dropdown menu. The dropdown menu is open, showing options: '--None--' (selected), '✓ --None--', 'Yes', and 'Refuses to Provide'. A 'Cancel' button is visible at the bottom of the form.

After indicating the response, select the **Save** button at the bottom to reveal the emergency preparedness questions.

There are several different types of data entry field types. Some are calendar pick lists, dropdown menus, as well as the option to select and move one or more items from the Available box to the Chosen box. Once finished, select the **Save** button at the bottom of the page.

The screenshot shows the 'Emergency Preparedness' tab of the VIVÉ Client Profile form. The top navigation bar includes 'Details', 'Consents', 'Contacts', 'General Comments', 'Referrals', 'Enrollments', 'Unit Entry', 'Documents', 'Program History', and 'Profile Update History'. Below this, the sub-tabs are 'Basic Demographics', 'Social Demographics', 'Emergency Preparedness' (highlighted with an orange box), 'Financial', and 'NYSOFA Additional Info'. The form contains several fields: a date field for '* Date' (Jan 20, 2025), a dropdown for 'Consents to share emerg prep info' (Yes), a date field for 'Revokes consent to share emerg prep info', a text box for 'Emergency Preparedness - Shelters require that pet owners have documentation verifying that all vaccinations are current.', a dropdown for 'Age' (80), a dropdown for 'Lives With' (Alone), a dropdown for 'Elevator and/or Steps' (Elevator only), a dropdown for 'Reliant on life-sustaining equip (LSE)?' (No, no one in the home is reliant on LSE), a section for 'Client is dependent upon' with 'Available' (Dialysis, Oxygen, Respirator, Wheelchair) and 'Chosen' (Insulin, Walker or cane) lists, a section for 'Communication Needs' with 'Client's primary language' (English) and 'Client speaks English' (Very Well) dropdowns.

Sub-Details: Financial

The financial form is a critical element of the Client Profile. The information entered here autofills elsewhere within VIVÉ, such as within the Cost Share Plan form for Case Management Agency users. The data fields must be completed in a certain way to calculate the poverty level.

If the client agrees to provide financial information, select the **Edit** button to review the options in the drop-down menu. Select “Yes” client agrees and then select the **Save** button.

The screenshot shows the 'Financial' tab of the VIVÉ Client Profile form. The top navigation bar is the same as the previous screenshot. Below it, the sub-tabs are 'Basic Demographics', 'Social Demographics', 'Emergency Preparedness', 'Financial' (highlighted with an orange box), and 'NYSOFA Additional Info'. The form contains a date field for 'Date' (Dec 20, 2024) and a dropdown menu for '* Client agrees to provide financial info?'. The dropdown menu is open, showing options: '--None--', '✓ --None--', 'Yes', and 'Refuse to provide'. A 'Cancel' button is visible below the date field.

To properly calculate the household poverty level, first select the household size. Enter the household size using the dropdown in that field. Select the **Save** button.

The screenshot shows the 'Financial' tab of the client profile. The 'Household Size' dropdown menu is highlighted with a red box and set to '1'. Other visible fields include 'Date' (Oct 21, 2024), 'Total of Asset Value' (\$0.00), 'Total of Household Amount (Yearly)' (\$10,200.00), and 'Total of Expenses (Yearly)' (\$3,600.00). The 'Financial' tab is also highlighted with a red box in the top navigation bar.

At the bottom of the page, there are three tabs: Income, Assets, and Expenses.

The screenshot shows the 'Incomes' tab with a table of income sources. A 'New' button is highlighted with a red box. The table lists two income sources: 'Rental Income' and 'Interest'.

Income ID	Monthly Income Info. compl...	Sources of income	Other source of income def...	Monthly Amount
1 HI-000100	Client	Rental Income		750
2 HI-000099	Client	Interest		500

To Enter Income

Click on the Income tab then select the **New** button. A pop-up window will appear so that you can enter the details of each source of income. Select **Save** and a new row of income will appear in the list.

The screenshot shows the 'New Income' pop-up window. It contains fields for 'Monthly Income Info. completed for' (set to '--None--'), 'Sources of income' (set to '--None--'), 'Other source of income defined', and 'Monthly Amount'. There is also a 'Contact' dropdown menu showing 'Katie Client'. 'Cancel' and 'Save' buttons are at the bottom.

The **New Income** pop-up asks about income for each member of the household.

At the bottom of the **Income** tab, VIVÉ will calculate the total monthly and annual income of the household.

If you ever need to add another source of income, click the **Income** tab and then select **New Income**.

At the top of the page, there is a summary of the household size, total annual income, total assets

and total expenses. If you want to see the Poverty Levels chart, click the hyperlink underneath the **Poverty Level PDF** label.

To edit any of these details, click the **Income** tab then select the link for a source of income. That brings you to the details for that income source, those details can be edited by clicking any of the pencils. Select **Save** when finished and **Exit** to return to the top of the page.

NOTE: The Low Income Minority field will pre-populate based on what has been entered in the Social Demographics screen.

To Enter Assets

To enter assets click the **Assets** tab. To enter the type and value of an asset, select the **New** button.

The screenshot shows the 'Assets' tab selected in the top navigation bar. Below the tabs, there's a section titled 'Assets (3)' with a 'New' button highlighted by a red rectangle. Below this is a table with the following columns: Asset ID, Monthly Asset Info. comple..., Assets type, Other source(s) of assets de..., and Value. The table contains one row with the following data: Asset ID: FA-00046, Monthly Asset Info. comple...: Client, Assets type: Primary Home, Other source(s) of assets de..., and Value: 150000.

The 'New Asset' pop-up form is shown. It has a purple header. The form includes the following fields: '* Asset Info. completed for' (dropdown menu with '--None--'), '* Assets type' (dropdown menu with '--None--'), 'Other source(s) of assets defined' (text input), '* Value' (text input), and '* Contact' (dropdown menu with 'Walle Louise'). At the bottom, there are 'Cancel' and 'Save' buttons.

The **New Asset** pop-up identifies the owner of the asset, its type and value.

The **Asset Total** will be at the top of the financial form. If you need to edit any of the assets, click the **Asset ID** link and click any pencil.

To Enter Expenses

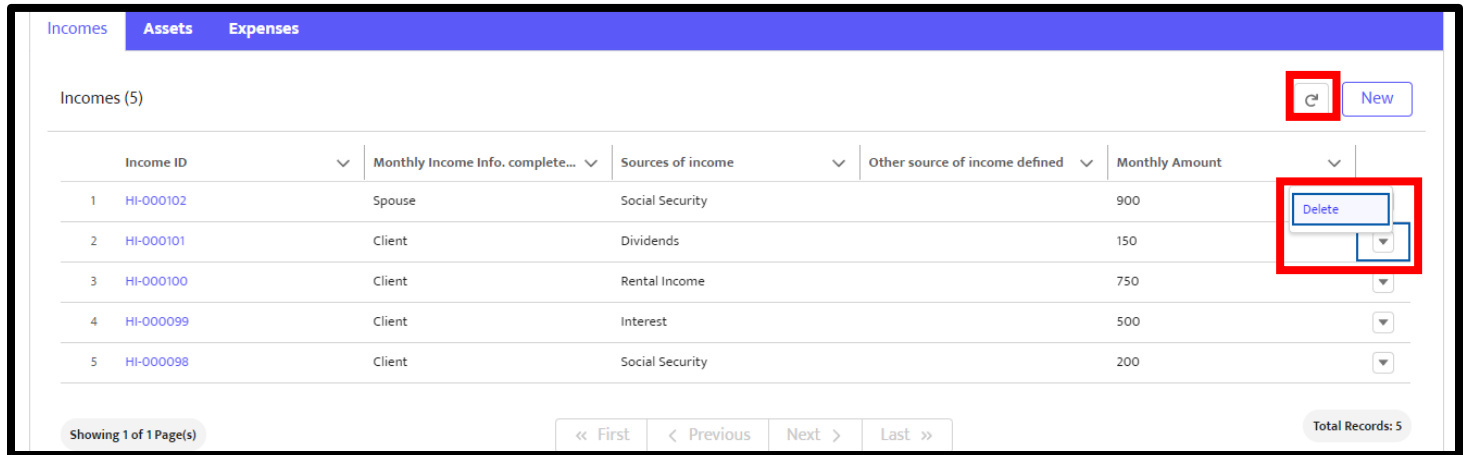
Select **New** to add an expense, or click on the **Expense ID** link to edit using the pencils.

Expenses have a sub-type. For example, an expense type is housing, then Sub-Type can be rent.

The 'New Expense' pop-up form is shown. It has a purple header. The form includes the following fields: '* Monthly Expense Info. completed for' (dropdown menu with 'Client'), '* Expense Type' (dropdown menu with 'Housing'), '* Sub Type' (dropdown menu with 'Rent', highlighted by a red rectangle), '* Monthly Amount' (text input with '500.00'), and '* Contact' (dropdown menu with 'Janetta Q Shields'). At the bottom, there are 'Cancel' and 'Save' buttons.

To Delete Financial Information

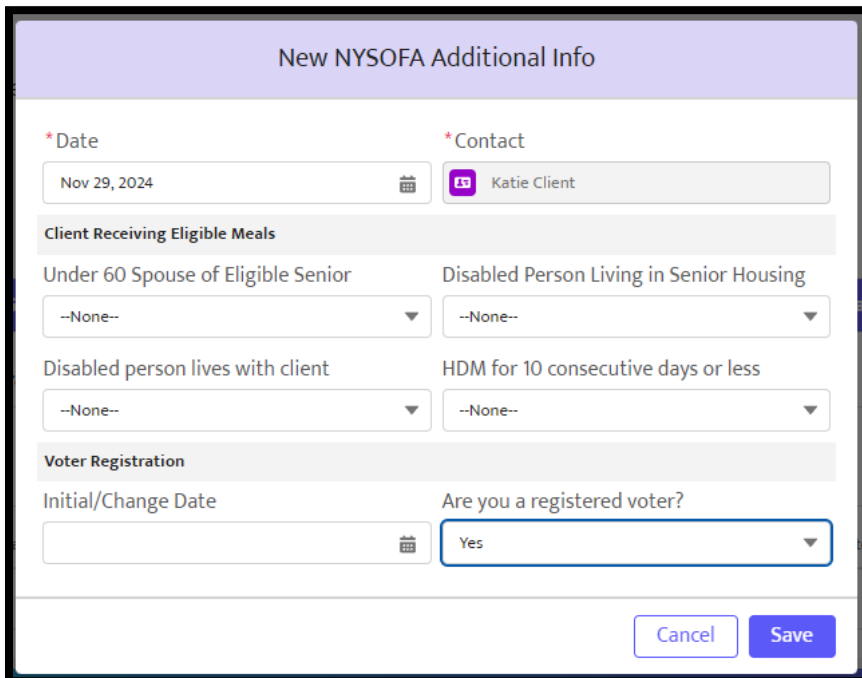
If you need to delete financial information for a client, whether it's income, assets, or expenses you can do so by clicking the down arrow on the righthand side of that row and selecting **Delete**. You may need to select **Refresh** on your screen to see that change.



Income ID	Monthly Income Info. complete...	Sources of income	Other source of income defined	Monthly Amount
1 HI-000102	Spouse	Social Security		900
2 HI-000101	Client	Dividends		150
3 HI-000100	Client	Rental Income		750
4 HI-000099	Client	Interest		500
5 HI-000098	Client	Social Security		200

Sub-Details: NYSOFA Additional Information

NYSOFA Additional Information fields are related to meals eligibility for those under the age of 60, and voter registration . This information is displayed in a list view. To add new additional information, select **New**.



New NYSOFA Additional Info

*Date: Nov 29, 2024

*Contact: Katie Client

Client Receiving Eligible Meals

Under 60 Spouse of Eligible Senior: --None--

Disabled Person Living in Senior Housing: --None--

Disabled person lives with client: --None--

HDM for 10 consecutive days or less: --None--

Voter Registration

Initial/Change Date: [Date Picker]

Are you a registered voter? Yes

Buttons: Cancel, Save

- When finished select **Save**. This will bring you back to the list view of **NYSOFA** information.
- If you need to edit previously entered **NYSOFA** Information, click the hyperlink in the ID column to open the **NYSOFA** screen, select the **Edit** button to make the changes. When you are finished making your edits, select the **Save** button.

General Comments Tab

The **General Comments** tab is where you can enter general information about this client that other providers can read i.e. “client has a service dog, please do not pet.” To add a **General Comment**, select the **New Comment** button. You can also print the comment by selecting the **Print Comments** button. If you want to edit the comment, click the pencil button on the right.

NOTE: General Comments are accessible to all users that have consent to view the client’s information.

To edit a **General Comment**, click the down arrow at the far right of the comment. Then select the **Edit** option . You can also filter the comments by date.

Event Date	Subject	Entered by	Comments
01/21/2025	Client has a service dog	David Dring	Client is legally blind and travels with a service dog ...
12/16/2024	Enter from side of the house	David Dring	The stairs to the front door need repair

Program History Tab

The **Program History** tab is the place in VIVÉ where you can see all of the client’s enrollments, and their enrollment status, with the exception of **DGMH**, Elder Crime, **Elder Justice** and **Legal Services** due to the sensitive nature of these programs.

Details	Consents	Contacts	General Comments	Referrals	Enrollments	Documents	Program History	Profile Update History
Program History								
	Program Name	Assigned To (Case Manager/Staff/Us...	Enrollment Status	Activation Date	Deactivation Date			
1	Friendly Visiting - QCH - CMA	Rheza Lascano	Inactive	01/15/2025	01/20/2025			
2	Friendly Visiting - QCH - CMA	David Dring	Active	01/15/2025				
3	Case Management - CBN - CMA		In Review	01/14/2025				
4	NY Connects - CASC - Staten Island		Active	01/13/2025				
5	Caregiver - SUNNYSIDE - Queens West	Ashley Abbott	Active	01/12/2025				

Profile Update History Tab

Profile Update History is where you will see a record of when the client's profile was created and when changes to their profile was made (i.e. their address).

Details	Consents	Contacts	General Comments	Referrals	Enrollments	Documents	Program History	Profile Update History
Profile Update History								
	Created Date	Created By	Changed Field	Old Value	New Value			
1	11/19/2024	David Dring	Home Address	2 LAFAYETTE STREET, MANHATTAN, NY 100...	300 EAST 5TH STREET, MANHATTAN, NY 10...			
2	10/16/2024	David Dring	created					

Inactivating a Client

When a client is no longer receiving NYC Aging services (i.e. because they moved out of New York City, or are deceased) you are required to inactivate the client in VIVÉ.

NOTE: No more data (client profile edits, case notes, units, etc.) can be entered for a client once they have been inactivated.

The steps for inactivating a client in VIVÉ are as follows:

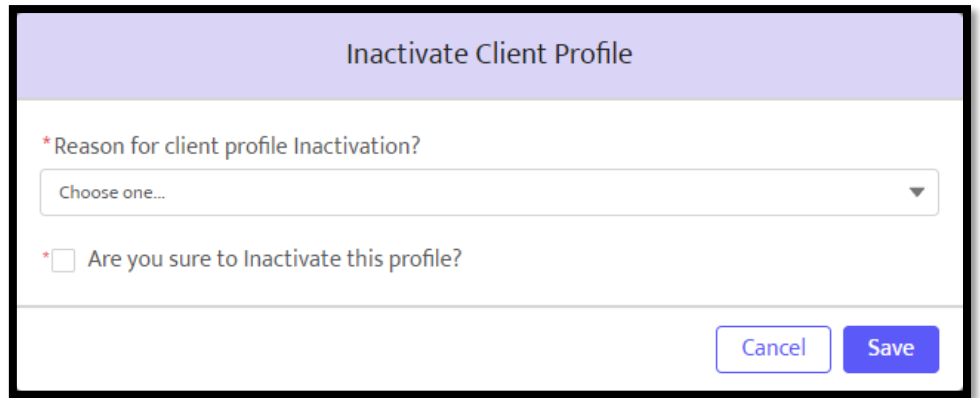
Step 1: Select the Inactivate Client Profile button at the top right of your screen.

 Upload Picture	Name Janetta Q Shields ID 0000000103 Status Active Contact Type Client	Inactivate Client Profile
Details Consents Contacts General Comments Referrals Enrollments Documents Program History Profile Update History		

Step 2: Click the dropdown under Reason for client profile inactivation? Select a reason.

Step 3: Click the box next to Are you sure to inactivate this profile?

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

A screenshot of a web form titled "Inactivate Client Profile". The form has a light purple header bar with the title. Below the header, there is a section with a red asterisk and the text "Reason for client profile Inactivation?". Underneath this is a dropdown menu with the text "Choose one..." and a downward arrow. Below the dropdown is another section with a red asterisk and the text "Are you sure to Inactivate this profile?". To the left of this text is an unchecked checkbox. At the bottom right of the form, there are two buttons: a light blue "Cancel" button and a dark blue "Save" button.

Inactivate Client Profile

* Reason for client profile Inactivation?

Choose one...

* ☐ Are you sure to Inactivate this profile?

Cancel Save

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**.

The VIVÉ Enrollments Reference Guide

VIVÉ is a customized client management system designed by NYC Aging. This system supports NYC Aging contractors to help manage their client interactions and report on services provided.

This reference guide provides instructions on **Creating, Approving, Rejecting, Assign Worker, On Hold, and Closing Enrollments**. **Enrollments** 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](#). You can also 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](#).

- **Overview of Enrollments**
- **Navigating Enrollments**
 - Determining Client Enrollment
- **Creating Enrollments**
 - Creating a new client enrollment
 - Enrollment Status In Review
- **Enrollment Details Menu**
 - Common features include:
 - Program specific features include:
- **Enrollment: Additional Features**
 - Approve a Client Enrollment
 - Reject Client Enrollment
 - Assign Worker
 - My Enrollments in Dashboard
 - Place an Enrollment On Hold
- **Closing Enrollment**
 - Closing an Enrollment: Past date
 - Closing Enrollment: Future Date

Overview of Enrollments

Enrollments is the secondary level for client data entry in VIVÉ. This level provides the ability to register the client with your specific program. **Enrollments** enable access to essential database features, including intake and various assessment forms, contact and document management, case notes, unit entry, waiting list management, and other key data entry tasks on the **Enrollment Details Menu** bar. Additional features available at this level include **Approve, Reject, Assign Worker, On Hold** and **Closing Enrollment**.

Navigating Enrollments

The **Enrollment** menu contains various tabs providing access to capture information about the client and track the work done on their behalf. The default tab on the menu bar will be **Enrollment Details**.

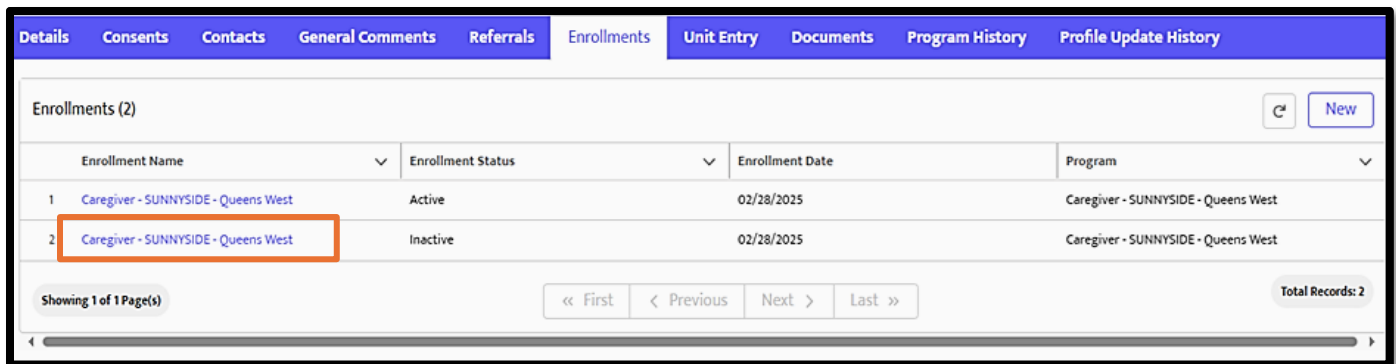
Depending on the program type, the status of an enrollment will either default to **Active** or **In Review** unless changed.

Determining Client Enrollment

Step 1: Perform a **Client Search** and select the link of the desired client to open their profile.

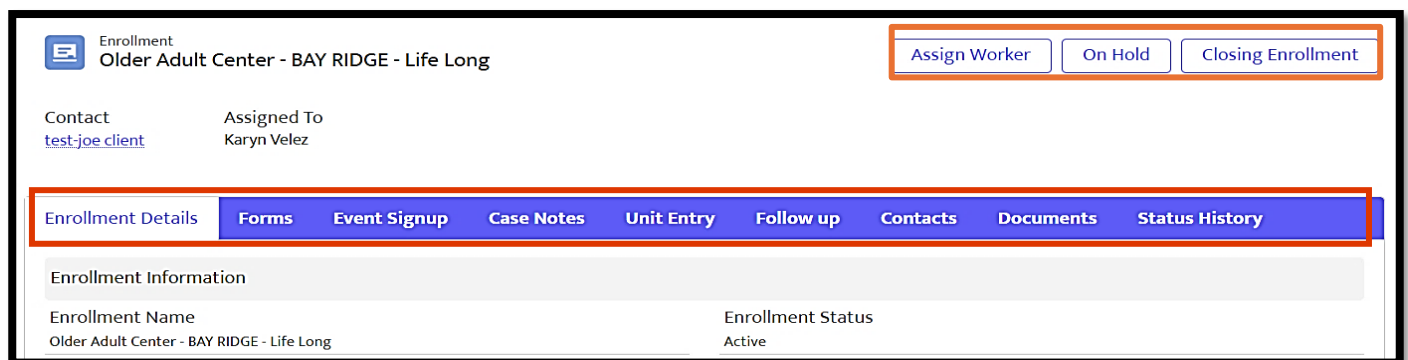
Step 2: Select the **Enrollments** tab. A List View of any active or inactive enrollments will appear.

Step 3: If a record is displayed on the List View with an **Enrollment Status** of **Active**, then the client is currently enrolled in your program. To access details about the client's enrollment, select the **Enrollment Name** link for the enrollment you wish to view. A new window will appear.



	Enrollment Name	Enrollment Status	Enrollment Date	Program
1	Caregiver - SUNNYSIDE - Queens West	Active	02/28/2025	Caregiver - SUNNYSIDE - Queens West
2	Caregiver - SUNNYSIDE - Queens West	Inactive	02/28/2025	Caregiver - SUNNYSIDE - Queens West

The top portion of the enrollment page will display the client's name, the name of assigned worker, and several navigational buttons that provide access to other database features. In addition, it also provides an overview of the enrollment record, **Referral Information**, **On Hold Details**, **Enrollment Closing Details**, and **System Information**. You may edit any fields by clicking on the pencil icons on the **Enrollment Details** form.



Enrollment

Older Adult Center - BAY RIDGE - Life Long

Assign WorkerOn HoldClosing Enrollment

ContactAssigned To

test-joe clientKaryn Velez

Enrollment DetailsFormsEvent SignupCase NotesUnit EntryFollow upContactsDocumentsStatus History

Enrollment Information

Enrollment NameEnrollment Status

Older Adult Center - BAY RIDGE - Life LongActive

Creating Enrollments

The **Enrollment Status** of the client will also display as **Active** by default unless changed. If no record is displayed on the Enrollments list view, then a new enrollment can be created.

Enrollment

Caregiver - SUNNYSIDE - Queens West

Assign Worker

On Hold

Closing Enrollment

Contact

Assigned To

[Maybel Mayweather](#)

Enrollment Details

Forms

Assessments

Event Signup

Case Notes

Unit Entry

Follow up

Contacts

Documents

Status History

Enrollment Information

Enrollment Name

Caregiver - SUNNYSIDE - Queens West

Enrollment Status

Active

Enrollment Date

2/19/2025

Program

Caregiver - SUNNYSIDE - Queens West

Referral Information

Linked Referral

Referring Agency Name

Referring Worker Name

On Hold Details

On Hold Start Date

On Hold End Date

On Hold Comments

Enrollment Closing Details

Closing Date

Closing Code

Closing Reason

System Information

Created By

Jamie L Foronda

Last Modified By

Jamie L Foronda

Created Date

2/19/2025, 1:26 PM

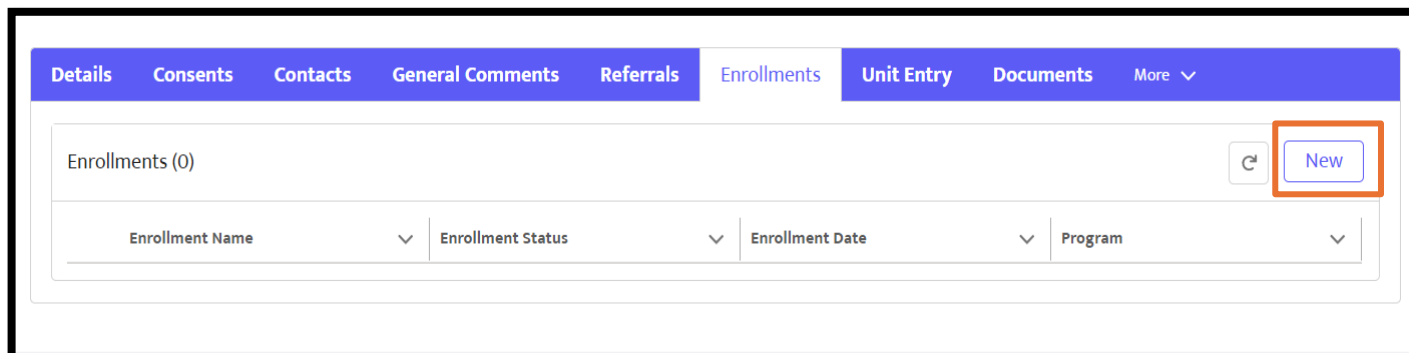
Last Modified Date

2/19/2025, 1:26 PM

Exit

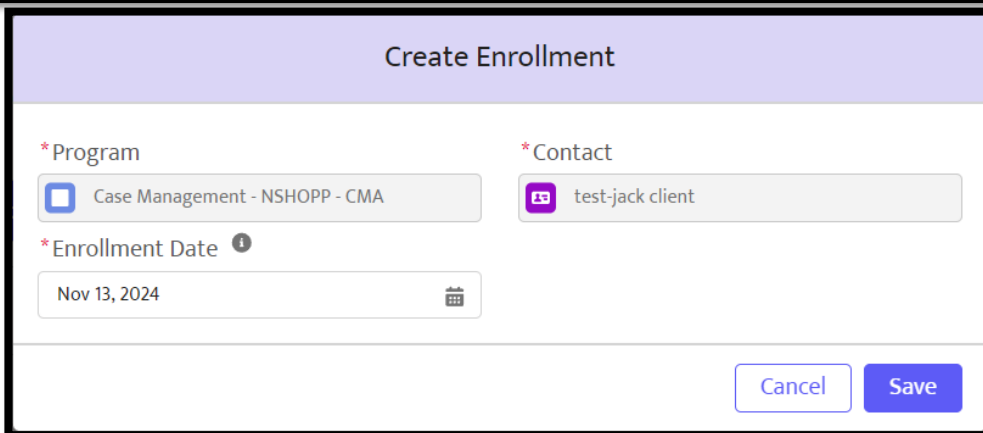
Creating a new client enrollment

Step 1: Select **New** in the **Enrollments** section and the **Create Enrollment** pop-up will appear. The form will be pre-populated with the program and client's name. These fields are greyed out and cannot be edited.



Step 2: You may change **Enrollment Date** by selecting the calendar icon or typing in the date. Enrollment can be set to a past date but not a future one.

Step 3: Confirm all information is correct before selecting **Save** and you will be directed to the **Enrollment Details** section.



The enrollment page for the newly enrolled client will now be displayed. An overview of the enrollment will be available in the **Enrollment Details** section when selected.

For some programs, the **Enrollment Status** field for newly registered clients will display **In Review** until the enrollment has been approved. Once approved, this status will change to **Active**. For other programs, newly enrolled clients will automatically receive an **Enrollment Status** of **Active**.

NOTE: For clients who are entirely new to VIVÉ and do not have a client profile, first complete the steps for entering a new client. (For more information on [Client Search](#) and [Client Profile](#))

Enrollment Status In Review

Enrollment
Case Management - NSHOPP - CMA

Assign Worker
Approve
Reject

Contact
test-jack.client

Assigned To

Enrollment Details
Contacts
Forms
Assessments
Documents
Event Signup
Unit Entry
Follow up
More

Enrollment Information

Enrollment Name
Case Management - NSHOPP - CMA

Enrollment Date
11/13/2024

Enrollment Status
In Review

Program
Case Management - NSHOPP - CMA

Referral Information

Linked Referral

Referring Agency Name

Referring Worker Name

On Hold Details

On Hold Start Date

On Hold End Date

On Hold Comments

Enrollment Closing Details

Closing Date

Closing Code

Closing Reason

System Information

Created By
Karyn Velez

Created Date
11/13/2024, 11:12 AM

Last Modified By
Karyn Velez

Last Modified Date
11/13/2024, 11:12 AM

Exit

Enrollment Details Menu

The **Enrollment Details Menu** provides access to a series of database features that provide programs with opportunities to input various data elements for clients. Some of these features are common to all programs who enroll clients in VIVÉ, while others have associations with only specific programs. These features are displayed on the menu bar as either a tab or as a pick on the **More** dropdown menu.

Common features include:

- [Enrollment Details](#) – Provides an overview of the client’s enrollment details.

- [Contacts](#) – Add contacts to the client’s file on VIVÉ.
- [Documents](#) – Upload certain client documents into VIVÉ.
- [Unit Entry](#) – Enter a client specific unit of service on VIVÉ.
- [Follow-Up](#) – Assign or be assigned actions to be completed on the client’s behalf in VIVÉ.
- [Status History](#) – A historical record of the enrollment status of the client in VIVÉ.

Program specific features include:

- **Forms** – Access to forms specific to each program type such as intakes, task list screenings, service plans or the NSI.
- **Assessments** – Access to program specific assessment forms, such as PHQ-9, Assistive Devices, etc.
- [Event Sign-Up](#) – Sign clients up for program specific events such as support groups, supplemental services, and/or educational activities.
- [Case Notes](#) – Create and record case notes associated with services provided for the client.
- **Service Plans: Meal Delivery, Home Care, and Friendly Visiting** – Create and manage various services and delivery plans that a program can authorize for a client’s care plan.
- **Cost Share** – Staff in **Case Management** programs can calculate the payment amount for a client’s home care services based on the client’s finances.
- **Waitlist** – Staff in **Case Management** programs can manage clients who are waiting for certain authorized services.
- **Match Status** – Staff in **Friendly Visiting** programs can match a client with a **Friendly Visiting** volunteer.

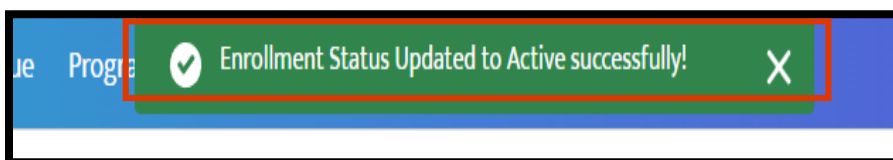
Enrollment: Additional Features

There are five additional features that are available to programs on the **Enrollment** level: **Approve**, **Reject**, **Assign Workers**, **On Hold** and **Closing Enrollment**. The display and use of these features will depend on your program type. Please see the chart below for more information on which features are available for your program type. How to navigate each of these features – **Approve**, **Reject**, **Assign Workers**, **On Hold** and **Closing Enrollment** – then follows.

Program Type	Approve	Reject	Assign Workers	On Hold	Closing Enrollment
Caregiver			✓	✓	✓
Case Management	✓	✓	✓		✓
Elderly Crime Victims			✓	✓	✓
Foster Grandparents			✓	✓	✓
HIICAP			✓	✓	✓
Nutrition			✓	✓	✓
Senior Employment			✓	✓	✓
TESS			✓	✓	✓
Volunteer Resource			✓	✓	✓
Elder Justice			✓	✓	✓
Friendly Visiting			✓	✓	✓
Geriatric Mental Health			✓	✓	✓
Home Care			✓	✓	✓
Legal			✓	✓	✓
NORC			✓	✓	✓
Social Adult Day			✓	✓	✓
Transportation			✓	✓	✓

Approve a Client Enrollment

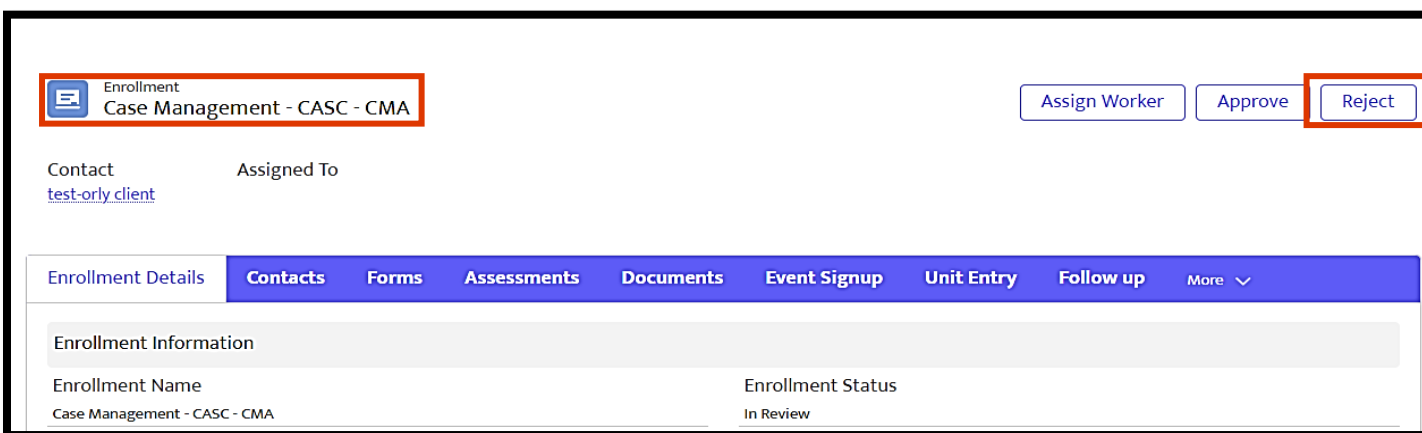
Programs who must **Approve** clients before the status of their enrollment can be updated from **In Review** to **Active** will see the **Approve** button displayed on the **Enrollment** screen. Once the **Approve** button is selected, a notification of successful activation will display. (See below)



The **Approve** and **Reject** buttons from the **Enrollment Details** screen are replaced with a **Closing Enrollment** button. The status of the client's enrollment updates to **Active**.

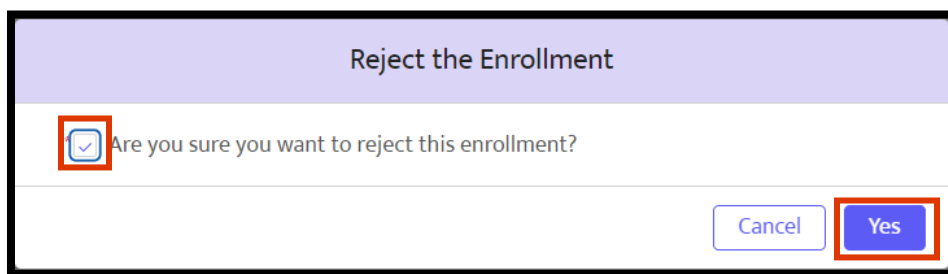
Reject Client Enrollment

Step 1: If a client's **Enrollment Status** is **In Review** and the program does not wish to enroll the client into their program, select the **Reject** button.



The screenshot shows the 'Enrollment Details' screen for 'Case Management - CASC - CMA'. The 'Enrollment Status' is 'In Review'. The 'Reject' button is highlighted with a red box. The 'Assigned To' field is blank. The 'Enrollment Name' is 'Case Management - CASC - CMA'.

Step 2: The **Reject the Enrollment** pop-up will display. You will be prompted to select the checkbox to confirm the rejection. Check the box marked, "Are you sure you want to reject this enrollment?"



The screenshot shows the 'Reject the Enrollment' pop-up dialog. It contains a checkbox labeled 'Are you sure you want to reject this enrollment?' which is checked. The 'Yes' button is highlighted with a red box.

Step 3: Select Yes. The Enrollment Status will be set to Inactive on the Enrollment Details page.

NOTE: If the **Reject** button is selected, the client's enrollment will be **Inactivated**. To "reactivate" the client's enrollment, a new **Enrollment** will need to be created.

Assign Worker

On the **Enrollment Details** screen, the **Assigned To** field will be left blank until a worker is assigned to the client enrollment.

Step 1: Select the **Assign Worker** button. The **Assign Worker** window will pop-up displaying an **Assigned To** dropdown list of all workers associated with the program.

Enrollment Case Management - NSHOPP - CMA

Contact: [test-django client](#) Assigned To:

Buttons: Assign Worker (highlighted), Closing Enrollment

Enrollment Details | Forms | Assessments | Waitlist | Cost Share Plan | Meal Delivery Plan | Home Care Service Plan | More ▾

Enrollment Information

Enrollment Name	Enrollment Status
Case Management - NSHOPP - CMA	Active

Step 2: Pick the worker's name who will be assigned to the client and select **Submit**. The worker's name will be added to the **Enrollment** screen's **Assigned To** field. A user can also view their assigned enrollment(s) through the **Dashboard** in the **My Enrollments** section.

Assign Worker

*Assigned To

Select Worker

Buttons: Cancel, Submit

The **Assign Worker** button will continue to be available. If the **Assigned Worker** needs to be changed, repeat the steps.

My Enrollments in Dashboard

Enrollments assigned to a user are listed on the **Dashboard** to streamline access. The client's name, which program enrolled them, the enrollment status, the enrollment date as well as the service start date are listed.

Dashboard
Community User Dashboard
As of Dec 26, 2024, 2:52 PM Viewing as Karyn Velez

Refresh

My Enrollments

Contact ↑	Enrollment: Enrollment Name	Enrollment Status	Enrollment Date	Service Start Date
test-avis client	Case Management - NSHOPP - CMA	Active	12/3/2024	12/3/2024
test-brad client	Case Management - NSHOPP - CMA	Inactive	11/12/2024	11/12/2024
test-clarey client	Case Management - NSHOPP - CMA	Active	1/11/2024	12/16/2024
test-django client	Case Management - NSHOPP - CMA	Active	12/26/2024	12/26/2024
test-helen client	Case Management - NSHOPP - CMA	Inactive	10/10/2024	11/20/2024
test-hope client	Case Management - NSHOPP - CMA	Active	10/21/2024	10/21/2024

View Report (My Enrollments)

In addition, a notification prompt regarding the recently assigned Enrollment will display in Notifications. To view this request, select the Bell Icon.

(For more information on [Dashboard](#))

Notifications [Mark all as read](#)

New Client Assignment
You have been assigned to "test-django client (0999001988)".

Place an Enrollment On Hold

On the **Enrollment Details** screen, the **On Hold** button places an active client's enrollment **On Hold** for a specified period.

Enrollment
Older Adult Center - BAY RIDGE - Life Long

Assign Worker **On Hold** Closing Enrollment

Contact Assigned To
[test-rosemary client](#)

Enrollment Details Forms Event Signup Case Notes Unit Entry Follow up Contacts Documents Status History

Enrollment Information

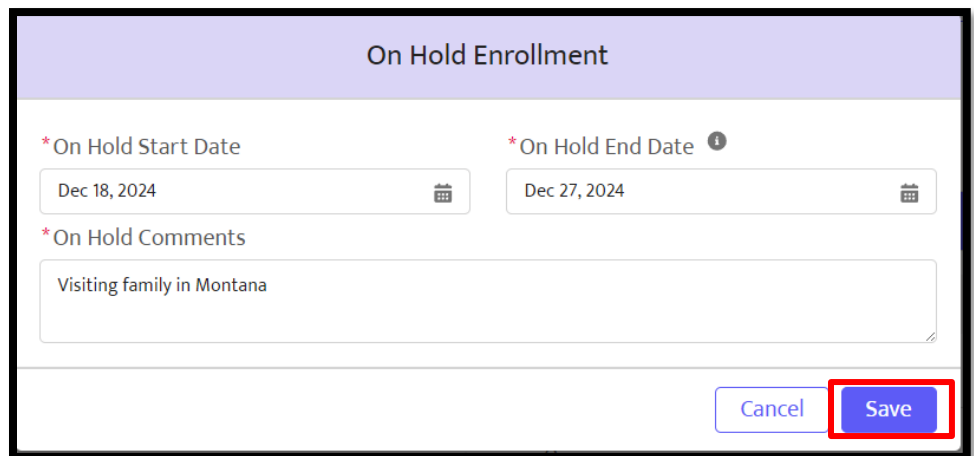
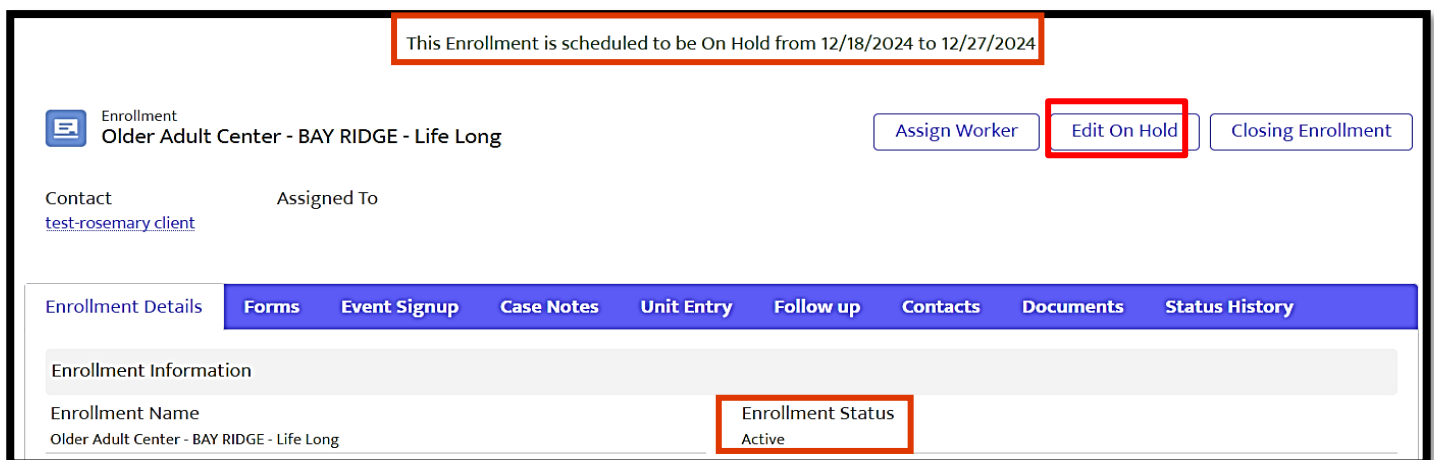
Enrollment Name
Older Adult Center - BAY RIDGE - Life Long

Enrollment Status
Active

Step 2: Complete the required fields and select the **Save** button. A notification that the **Enrollment** has been scheduled to be placed on hold successfully will display. On the **Enrollment** screen, the dates for the **On Hold** will also appear at the top of the screen. Note that the **Enrollment** itself will remain **Active** during this **On Hold** period.

Fill in all required fields in the **On Hold Enrollment** form. Fields with a red asterisk (*) are required. Select **Save**.

If the **On Hold** request requires editing, select the **Edit On Hold** button from the **Enrollment Details Menu** and make all necessary changes. These changes can be made prior to the start of the **On Hold** date or any time during the scheduled **On Hold** period.

A screenshot of the 'On Hold Enrollment' form. The form has a purple header with the title 'On Hold Enrollment'. Below the header, there are two date fields: '* On Hold Start Date' with the value 'Dec 18, 2024' and '* On Hold End Date' with the value 'Dec 27, 2024'. Both fields have a calendar icon. Below these is a text area for '* On Hold Comments' with the value 'Visiting family in Montana'. At the bottom right, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red border.A screenshot of the 'Enrollment' screen. At the top, a red-bordered box contains the text 'This Enrollment is scheduled to be On Hold from 12/18/2024 to 12/27/2024'. Below this, the enrollment details are shown: 'Enrollment Older Adult Center - BAY RIDGE - Life Long'. To the right of this are three buttons: 'Assign Worker', 'Edit On Hold' (highlighted with a red border), and 'Closing Enrollment'. Below the enrollment details, there is a section for 'Contact' and 'Assigned To' with the value 'test-rosemary client'. Below this is a horizontal menu with tabs: 'Enrollment Details', 'Forms', 'Event Signup', 'Case Notes', 'Unit Entry', 'Follow up', 'Contacts', 'Documents', and 'Status History'. Below the menu, there is a section for 'Enrollment Information' with two fields: 'Enrollment Name' with the value 'Older Adult Center - BAY RIDGE - Life Long' and 'Enrollment Status' with the value 'Active'. The 'Enrollment Status' field is highlighted with a red border.

NOTE: An **On Hold** can also be requested for programs that authorize service delivery plans such as Home Delivered Meals, Home Care and Friendly Visiting. For more information regarding **On Hold** for service delivery plans, please see your **Specific Program Reference Guide**.

Closing Enrollment

On the **Enrollment** screen, the **Closing Enrollment** button is available to close a client's record in your specific program.

Enrollment Case Management - NSHOPP - CMA

Assign Worker Closing Enrollment

Contact Assigned To
test-helen client

Enrollment Details Forms Assessments Waitlist Cost Share Plan Meal Delivery Plan Home Care Service Plan More

Enrollment Information

Enrollment Name	Enrollment Status
Case Management - NSHOPP - CMA	Active

NOTE: Closing an enrollment only closes the client's enrollment status with your program and does not close the client's enrollment for any other NYC Aging programs. The client's case remains **Active** at the **Client Profile** level until the **Inactivate Client Profile** process has been completed. This process closes the client's file for all NYC Aging programs they are associated with, and the client then becomes "inactive" in the system. Careful to not inactivate a client, because that client maybe enrolled in other programs. (For more information on [Client Profile](#))

Recording an **Enrollment** closure is not bound by whether the closure date has passed, or if the closure has been scheduled for the future. Let us look at the process for both.

Closing an Enrollment: Past date

Step 1: Select the **Closing Enrollment** button. The **Closing Enrollment** pop-up will appear with the required fields **Closing Date**, **Closing Code** and **Closing Reason**.

Step 2: The **Closing Date** field can be completed either by choosing a date from the calendar icon or by typing in the date. The **Closing Code** field provides a dropdown list of possible categories associated with why an enrollment needs to be closed. The **Closing Reason** field is a comment box that provides for a more detailed reason about the closure. Once all fields are updated select the **Save** button.

The system will return to the **Enrollment** screen where a notification will display the **Inactive** status of the **Enrollment** at the top of the page. This **Inactive** status will also be noted under the **Enrollment Status** heading on the **Enrollment Details** page. (See below)

Closing Enrollment

* Closing Date

* Closing Code

Select Closing Code

* Closing Reason

type Closing Reason here...

Cancel Save

Enrollment
Case Management - NSHOPP - CMA

This Enrollment was marked Inactive on 12/26/2024

Assign Worker

Contact
test-helen client

Assigned To

[Enrollment Details](#)
[Forms](#)
[Assessments](#)
[Waitlist](#)
[Cost Share Plan](#)
[Meal Delivery Plan](#)
[Home Care Service Plan](#)
[More](#)

Enrollment Information

Enrollment Name Case Management - NSHOPP - CMA	Enrollment Status Inactive
---	-------------------------------

The status of an enrollment can be viewed on the list located in **Program History** on the **Client Details** section.

Upload Picture

Name
test-helen client

Inactivate Client Profile

ID
0999001639

Status
Active

Contact Type
Client

[Details](#)
[Consents](#)
[Contacts](#)
[General Comments](#)
[Referrals](#)
[Enrollments](#)

Program History

[More](#)

Program History (3)

Program Name	Assigned To (Case Manag...	Enrollment Status	Activation Date	Deactivation Date
1 Case Management - NSHOPP - C...		Inactive	12/26/2024	12/26/2024
2 Older Adult Center - BAY RIDGE ...		Active	11/14/2024	

NOTE: To protect client confidentiality, there are four programs that will never display the client's enrollment status on Program History. These programs are Elder Justice, Geriatric Mental Health, Elderly Crime Victims Center and Legal Services.

Closing Enrollment: Future Date

Similar to the process of **Closing an Enrollment** for a past date, an enrollment can be closed with a future date. Once closed, the **Enrollment Details** page will display a message with the date and reason for the closure. The **Enrollment Status** will remain active until the scheduled closing date occurs.

On the date that the enrollment is scheduled to close, a message located on the top of the client's profile will appear confirming the status has been changed to **Inactive**. This updated status will also be noted under **Enrollment Status**.

This Enrollment is scheduled to be closed on 1/6/2025 with the reason Moving to live with daughter in Queens.

Enrollment

Case Management - NSHOPP - CMA

Assign Worker

Edit Enrollment Closure

Contact

[test-joy.client](#)

Assigned To

Karyn Velez

Enrollment Details

Forms

Assessments

Waitlist

Cost Share Plan

Meal Delivery Plan

Home Care Service Plan

More

Enrollment Information

Enrollment Name

Case Management - NSHOPP - CMA

Enrollment Status

Active

NOTE: On the **Program History** List View, the **Enrollment Status** for the client will also remain **Active** until the closure date occurs.

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**.

The VIVÉ Case Notes 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 and viewing, editing, and finalizing **Case Notes**.

Case Notes 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](#). Users can also use their 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:

- **Case Notes Overview**
- **Entering Case Notes**
- **Editing Case Notes**
- **Finalizing Case Notes**
- **Printing Case Notes**
- **Linking Case Notes to Units**

Case Notes Overview

Case Notes detail interactions with clients and record important client information. They are an opportunity to provide a deeper understanding of your client and their situation. **Case Notes** document what is happening with your client: what are the client's needs, how they are addressed, explanation and record of services provided, and if there are any outstanding issues. Additionally, they are a vehicle for supervision and oversight.

TIP: Be considerate and careful when writing case notes. They are legal documentation, which maybe reviewed during audits, assessments, and legal proceedings.

Entering Case Notes

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

Step 2: From the **Details** menu, click on the **Enrollment** tab and your program enrollment link.

Step 3: From the **Enrollment Details** menu, click on the **Case Notes** tab section and select **New Case Note** button.

The screenshot shows the 'Case Notes' tab in a software interface. At the top, there are navigation tabs: Enrollment Details, Forms, Event Signup, Case Notes (selected), Unit Entry, Follow up, Contacts, Documents, and Status History. Below the tabs, there are date pickers for 'From' and 'To' with a 'Filter' button. A table titled 'Case Notes (2)' displays two entries. The 'New Case Note' button is highlighted with a red box. Below the table, there are pagination controls and a 'Total Records: 2' indicator.

	Subject	Note Type	Service Date	Status	Comments	Program Name	Own/Shared Note	Created By	Created Date
1	Discussed Living Situ...	Office Visit	01/12/25	Draft	Nat is experimenting ...	Older Adult Center - ...	Own	David Dring	01/26/25
2	Benefits Discussion	Office Visit	01/19/25	Final	Nat wanted an overvi...	Older Adult Center - ...	Own	David Dring	01/26/25

Step 4: A pop-up menu will appear to enter the notes. Keep in mind fields preceded by a red asterisk (*) are required. Follow these instructions when entering the fields:

The 'New Case Note' form contains the following fields: 'Service Date' (calendar icon, value: Nov 7, 2024), 'Contact With' (dropdown, value: Katie Client (Client)), 'Status' (dropdown, value: Draft), '* Note Type' (dropdown, value: Phone Call), '* Subject' (text input, value: Calling to check in on client), and 'Comments' (text area, value: Client has not been at the center in two weeks which was unusual. Client reported she was in the hospital recently due to a fall at home. She is home now and feeling better and reports she plans to be back at the center next week.). There is a character count '232 / 10000 characters' and a 'Share with Other Programs?' checkbox. 'Cancel' and 'Submit' buttons are at the bottom right.

Service Date defaults to today's date. It can be a previous date, but not one in the future. **Contact With** can be either the client or one of the client's contacts. **Status** defaults to draft until finalized. **Note Type** varies depending upon your program (required). **Subject** is a title for the note (required). **Comments** (the actual Case Note) allows up to 10,000 characters for your note.

Select **Submit** to save the note.

TIP: The system will become inactive, and you could lose your work, if you do not click/type for 20 minutes. Clicking or typing within the text area within that 20 minutes will start the clock over.

Editing Case Notes

Step 1: From the **Details** menu, click on the **Enrollment** tab and your program enrollment link.

Step 2: From the **Enrollment Details** menu, click on the **Case Notes** tab.

Step 3: Click on the Subject name link to access the details of the **Case Note**.

Enrollment Details Forms Event Signup Case Notes Unit Entry Follow up Contacts Documents Status History

From To Filter

Case Notes (2) [New Case Note](#) [Print Case Notes](#)

	Subject	Note Type	Service Date	Status	Comments	Program Name	Own/Shared Note	Created By	Created Date
1	Discussed Living Situ...	Office Visit	01/12/25	Draft	Nat is experimenting ...	Older Adult Center - ...	Own	David Dring	01/26/25
2	Benefits Discussion	Office Visit	01/19/25	Final	Nat wanted an overvi...	Older Adult Center - ...	Own	David Dring	01/26/25

Showing 1 of 1 Page(s) << First < Previous Next > Last >> Total Records: 2

Step 4: Click on the pencils within the **Case Note** details to edit the fields. Once finished select **Save** located at the bottom of the form.

Details

Service Date
12/13/2024

Subject
Intake details

Program Name
Older Adult Center - BAY RIDGE - Life Long

Comments
Met with client and completed the intake in person. Still need to enter details into VIVE.

Created By
David Dring

Owner
Older Adult Center - BAY RIDGE - Life Lo

Status
Draft

Note Type
Phone Call

Share with other programs?
☐

Last Modified By
David Dring

TIP: When editing the note (comments), you can drag the lower right corner down to expand the window and view more of the note.

Finalizing Case Notes

To complete the note taking process, Case Notes must be finalized. The pathway for this process is to access the details of the **Case Notes**. There all the information about the note can be reviewed and the status can be changed to final. Once final, the case note can no longer be edited.

Details

Service Date

12/13/2024

*Subject

Intake details

Program Name

Older Adult Center - BAY RIDGE - Life Long

Comments

Met with client and completed the intake in person. Still need to enter details into VIVE.

Status

Final

--None--

Draft

✓ Final

Inactive

* = Required Information

Printing Case Notes

Step 1: There is a button to **Print Case Notes** from the list view of the **Case Notes** section. Click this button to initiate a print view of all the case notes for this client. The notes will be printed as a PDF file.

Enrollment DetailsFormsEvent SignupCase NotesUnit EntryFollow upContactsDocumentsStatus History

From

To

Filter

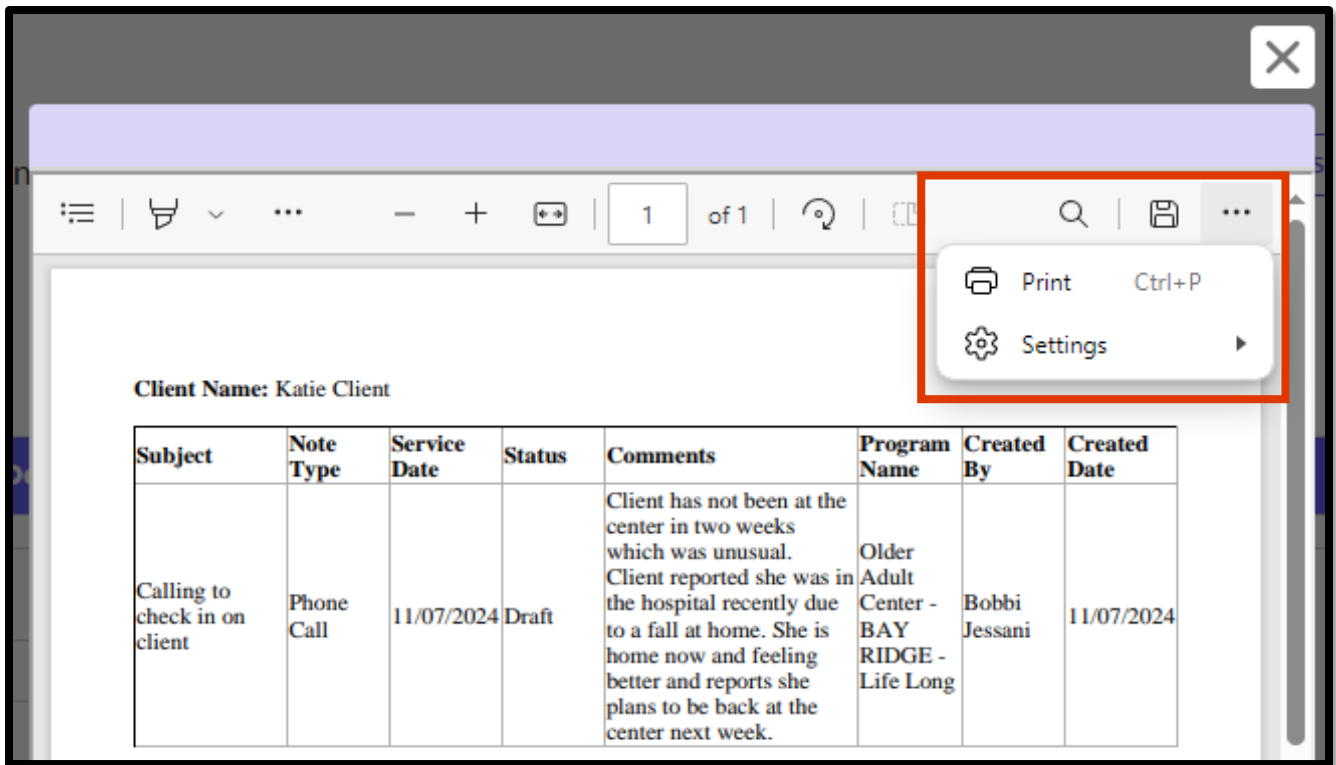
Case Notes (8)

New Case NotePrint Case Notes

	Subject	Note Type	Service Date	Status	Notes	Program Name	Own/Shared Note	Created By	Created Date
1	Calling to check in on...	Phone Call	02/23/25	Draft	Client has not been a...	Older Adult Center - ...	Own	David Dring	02/23/25
2	Follow up phone call ...	Phone Call	12/16/24	Draft	SNAP confirmed they...	Older Adult Center - ...	Own	Bobbi Jessani	12/16/24
3	Karyn's Case Note an...	Phone Call	11/26/24	Final	here is my case note	Older Adult Center - ...	Own	Karyn Velez	11/26/24

To make is easier to find a particular note you can enter a date range in the “From” and “To” fields.

Step 2: A PDF print pop-up window will appear. Use your local printer's settings to print the notes.



Linking Case Notes to Units

For those programs where it applies, case notes can be attached to units to track agency activities. At the bottom of the **Unit Entry** form, there is a list of the finalized case notes.

Step 1: Access **Unit Entry** from **Enrollment Details Menu**.

Step 2: Select **New** to enter a new unit.

Unit Entry (1)

Unit Entry #	Date of Occurrence	Service Type	Funding Source	Units	Amount	Created by	Created Date	Source	Status
1 UE-3840512	12/10/2024	Case Management ...	NYC Aging Funded ...	0.75		Emily Yu	12/10/2024	Enrollment	Draft

Showing 1 of 1 Page(s)

« First < Previous Next > Last »

Total Records: 1

Step 3: At the bottom of the **Unit Entry** form, is a list of finalized case notes. Use the check box to the left of the row to indicate the related case note. There can be more than one case note linked to a unit.

VIVÉ Knowledge Base – Case Notes

Unit Entry

* Date of Occurrence

Jan 27, 2025

Enrollment

Case Management - NSHOPP - CMA

* Service Type

Case Management - DFTA Funded

* Funding Source

NYC Aging Funded Service

* Time Spent

60 min

Service Comments

see case note

* Status

Draft

Client

Everything VIVÉ

Host Type

Telephonic

Unit Type

Hour

* Total Units

1.00

Case Notes

☒ Subject	Note Type	Contact Name	Service Date	Status	Created Date	Created Name
☒ Spoke with Landlord on behal...	Phone Call	Everything VIVÉ	01/27/2025	Final	01/28/2025	David Dring

Showing 1 of 1 Page(s)

« First

< Previous

Next >

Last »

Cancel

Save

Total Records: 1

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**.

VIVÉ a Product of NYC Aging

58

Last Updated: 6/27/2025

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**](#)
- [**Editing Existing Units from Details Menu**](#)
- [**Entering Units via the Details Menu**](#)
- [**Entering Units from the Enrollment Details Menu**](#)
- [**Editing Units from Enrollment Details Menu**](#)
- [**Entering Units from Program Tools**](#)
- [**Editing an Existing Unit Entry via Program Tools**](#)
- [**Entering Units by QR Code Scanning**](#)
- [**Anonymous Unit Entry**](#)
- [**Voiding a Unit**](#)
- [**Monthly Unit Summary**](#)

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.

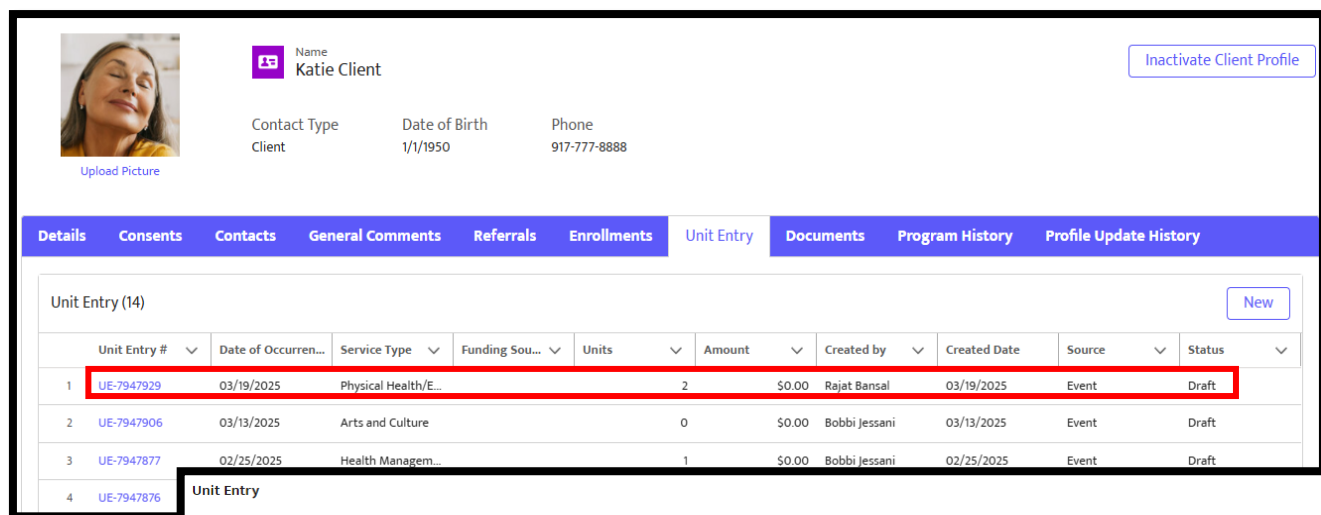
You can enter units in VIVÉ in three places: **Details Menu**, **Enrollment Menu**, or **Program Tools**. For more information on [Events](#).

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.



Client Profile: Katie Client

Upload Picture

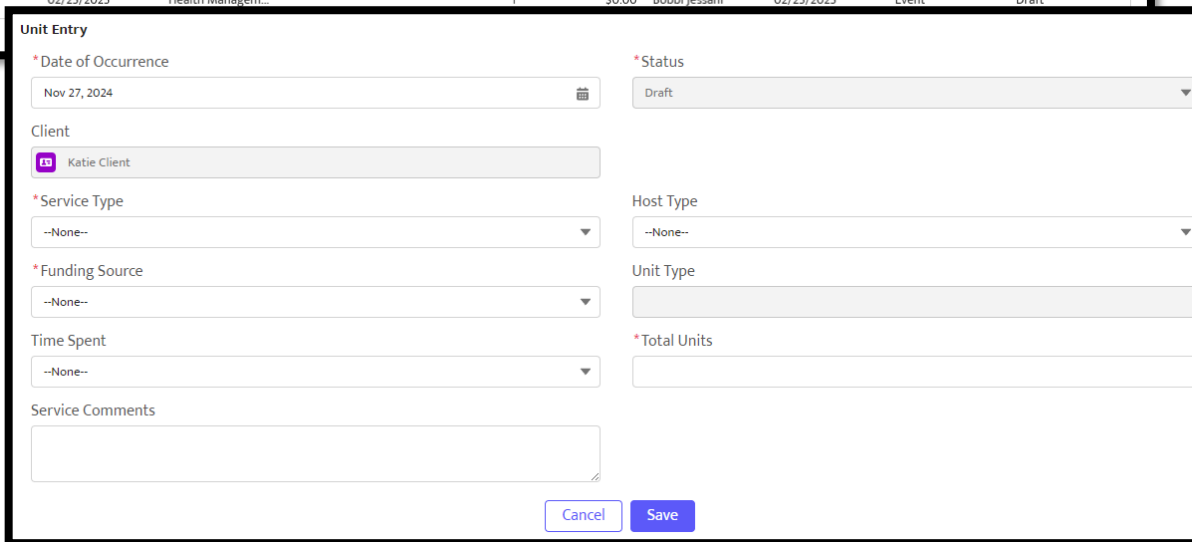
Contact Type: Client | Date of Birth: 1/1/1950 | Phone: 917-777-8888

[Inactivate Client Profile](#)

Unit Entry (14) [New](#)

Unit Entry #	Date of Occurrence	Service Type	Funding Source	Units	Amount	Created by	Created Date	Source	Status
1	UE-7947929	03/19/2025	Physical Health/E...	2	\$0.00	Rajat Bansal	03/19/2025	Event	Draft
2	UE-7947906	03/13/2025	Arts and Culture	0	\$0.00	Bobbi Jessani	03/13/2025	Event	Draft
3	UE-7947877	02/25/2025	Health Managem...	1	\$0.00	Bobbi Jessani	02/25/2025	Event	Draft
4	UE-7947876								

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



Unit Entry

* Date of Occurrence: Nov 27, 2024

* Status: Draft

Client: Katie Client

* Service Type: --None--

* Funding Source: --None--

Host Type: --None--

Unit Type:

Time Spent: --None--

* Total Units:

Service Comments:

[Cancel](#) [Save](#)

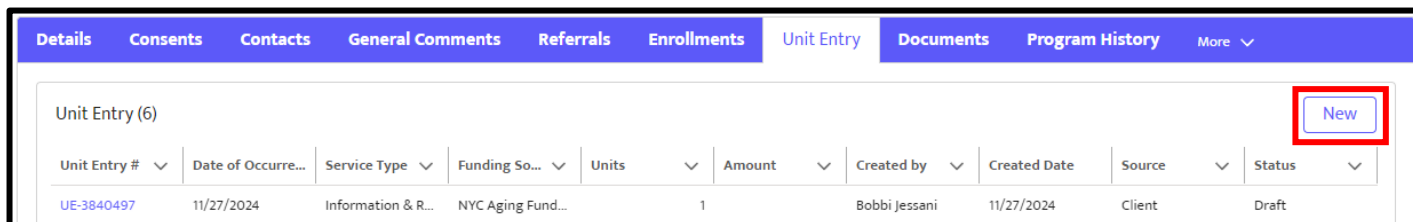
NOTE: Units are in draft status until the Monthly Unit Summary is finalized. More on that below.

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.



Unit Entry (6) [New](#)

Unit Entry #	Date of Occurrence	Service Type	Funding Source	Units	Amount	Created by	Created Date	Source	Status
UE-3840497	11/27/2024	Information & R...	NYC Aging Fund...	1		Bobbi Jessani	11/27/2024	Client	Draft

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

Unit Entry

* Date of Occurrence

Mar 22, 2025

Client

Katie Client

* Service Type

Information & Referral

* Funding Source

NYC Aging Funded Service

Time Spent

60 min

Service Comments

* Status

Draft

Host Type

--None--

Unit Type

Contact

* Total Units

1.00

Cancel

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 **Enrollments**.

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.

Enrollment Details
Forms
Event Signup
Case Notes
Unit Entry
Follow up
Contacts
Documents
Status History

Unit Entry (8)

New

	Unit Entry #	Date of Occurrence	Service Type	Funding Source	Units	Amount	Created by	Created Date	Source	Status
1	UE-7947911	03/16/2025	Education/Recrea...	NYC Aging Funde...	1		David Dring	03/16/2025	Enrollment	Draft
2	UE-7947910	03/16/2025	Friendly Visiting	NYC Aging Funde...	1		David Dring	03/16/2025	Enrollment	Draft

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**.

Unit Entry

* Date of Occurrence

Mar 22, 2025

Enrollment

Older Adult Center - BAY RIDGE - Life Long

* Service Type

Education/Recreation

* Funding Source

NYC Aging Funded Service

Time Spent

--None--

Service Comments

* Status

Draft

Client

Janetta Q Shields

Host Type

In-Person and Virtual

Unit Type

Group Session

* Total Units

1.00

Case Notes

☐ Subject

☐ Client Called about Benefits

☐ Landlord

☐ Daughter

☐ Testing

Note Type	Contact Name	Service Date	Status	Created Date	Created Name
Phone Call	Janetta Q Shields	01/03/2025	Draft	01/21/2025	David Dring
Phone Call	Janetta Q Shields	02/17/2025	Draft	02/17/2025	David Dring
Phone Call	Janetta Q Shields	02/17/2025	Draft	02/17/2025	David Dring
Walk-In	Janetta Q Shields	03/20/2025	Draft	03/20/2025	David Dring

Showing 1 of 1 Page(s)

<< First

< Previous

Next >

Last >>

Total Records: 4

Cancel

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 **Enrollments**.

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.

Enrollment Details Forms Event Signup Case Notes Unit Entry Follow up Contacts Documents Status History										
Unit Entry (8)										New
	Unit Entry #	Date of Occurrence	Service Type	Funding Source	Units	Amount	Created by	Created Date	Source	Status
1	UE-7947911	03/16/2025	Education/Recreation	NYC Aging Funde...	1		David Dring	03/16/2025	Enrollment	Draft
2	UE-7947910	03/16/2025	Friendly Visiting	NYC Aging Funde...	1		David Dring	03/16/2025	Enrollment	Draft

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.

Unit Entry

*Date of Occurrence

Mar 16, 2025

*Status

Draft

Enrollment

Older Adult Center - BAY RIDGE - Life Long

Client

Janetta Q Shields

*Service Type

Education/Recreation

Host Type

--None--

*Funding Source

NYC Aging Funded Service

Unit Type

Group Session

Time Spent

--None--

*Total Units

1.00

Service Comments

Case Notes

☐	Subject	Note Type	Contact Name	Service Date	Status	Created Date	Created Name
☒	Entered intake	Other	Janetta Q Shields	12/18/2024	Final	01/21/2025	David Dring
☐	Client Called about Benefits	Phone Call	Janetta Q Shields	01/03/2025	Draft	01/21/2025	David Dring

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.

Logged in user is Janice Farmer and working in Older Adult Center - BAY RIDGE - Life Long program.

Event Profile | Monthly Unit Summary | Scheduled Trips | Drivers/Vehicles List | Activity Tracker | Wellness Volunteer | Survey Invitation Links | More

Active Event (50) [New Event Profile](#)

	Event Name	Event Type	Unit Type	Event Start Date	Event End Date
1	Balance Class FY24	In-Person and Virtual	Participant	07/01/2023	06/30/2034
2	Bay Ridge Mocks FY24	In-Person	Group Session	04/01/2024	06/30/2043
3	Bead Making	Internal Group Session	Event	02/20/2025	
4	Bingo FY24	Units by Client	Group Session	04/01/2024	06/30/2043

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

Details | Event Signup | **Unit Entry**

Unit Entry (4) [New](#)

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

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.

Unit Entry

Event Details

Event Profile: [Balance Class FY24](#)

Event Location:

Fee Amount: \$0.00

Event Type: Units by Client

Unit Type: Participant

Event Manager:

Unit Entry Details

*Date of Occurrence: Mar 10, 2025

*Status: Draft

Total Units: 2.00

Total \$: 0.00

Filter & Auto Fill

Name: [Filter](#)

Funding Source: --None--

Units: 0

Amount: 0

Select all Attended? ☐

[Auto Fill](#) [Scan QR Code](#)

Client List

Name	Date of Birth	Gender	Home Address	Enrollment Status	Funding Source	Units	Amount	Attended?
Alberto Columbiani	02/19/1959		8402 4TH AVE, B-7, BROOKLYN, NY 11209	Active	NYC Aging Funded Service	1	0	☒
Alex Morgan	12/31/1944		10 READE STREET, MANHATTAN, NY 10007	Active	Discretionary Funded	1	0	☒
Alistar Cook	03/02/1944		455 GERARD AVENUE, 7, BRONX, NY 10451	Active	--None--	0	0	☐
Amy Adams	12/31/1949		15 BAY RIDGE AVENUE, 58, BROOKLYN, NY 11220	Active	--None--	0	0	☐
Katie Client	12/31/1949		541 EAST 20TH STREET, 38, MANHATTAN, NY 10010	Active	NYC Aging Funded Service	1	0	☒

- 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.

Logged in user is David Dring and working in Older Adult Center - BAY RIDGE - Life Long program.

Event Profile | Monthly Unit Summary | Scheduled Trips | Drivers/Vehicles List | Activity Tracker | Wellness Volunteer | Survey Invitation Links | More ▾

Monthly Unit Summary (5)

Name	Month	Year	Created Date	Status
MUS-000070	February	2025	02/04/2025	Draft
MUS-000057	December	2024	01/10/2025	Final

New

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.

Monthly Unit Summary

*Program: Older Adult Center - BAY RIDGE - Life Long

*Status: Draft

*Month: March

*Year: 2025

Total Cost Center Amount

Calculate Units

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**.

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 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.

Name	Related Contact	Relationship	Caregiver/Care Receiver	Status
1 CR-263321	Ashley Abbott	Grandmother	Primary Care Receiver	Active

Associating Contacts with Your Client

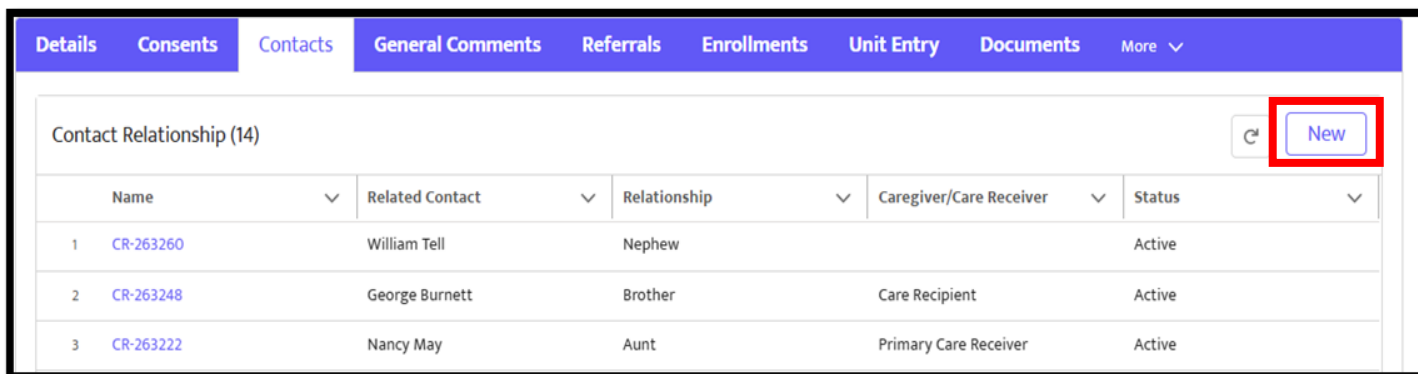
As there are three types of contacts, there are three pathways to associate them with your client. However, each of these pathways start the same way: searching for an existing contact.

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.

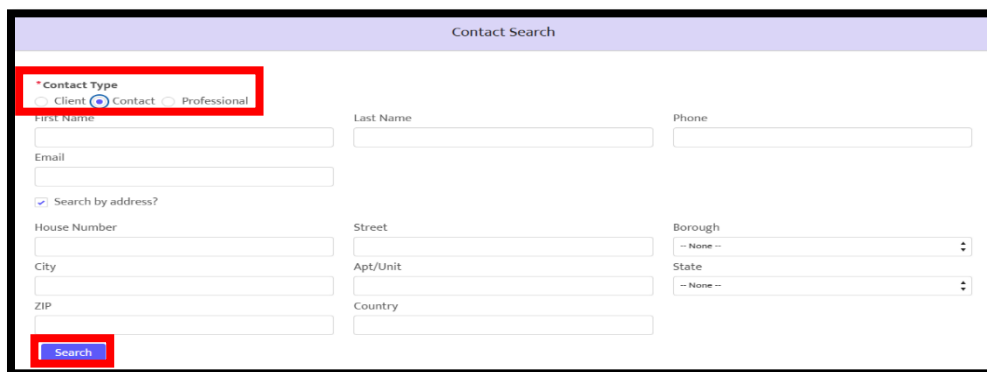


The screenshot shows a software interface with a top navigation bar containing tabs: Details, Consents, Contacts, General Comments, Referrals, Enrollments, Unit Entry, Documents, and More. The 'Contacts' tab is selected. Below the tabs, there is a section titled 'Contact Relationship (14)' with a refresh icon and a 'New' button highlighted with a red box. Below this is a table with columns: Name, Related Contact, Relationship, Caregiver/Care Receiver, and Status. The table contains three rows of contact information.

	Name	Related Contact	Relationship	Caregiver/Care Receiver	Status
1	CR-263260	William Tell	Nephew		Active
2	CR-263248	George Burnett	Brother	Care Recipient	Active
3	CR-263222	Nancy May	Aunt	Primary Care Receiver	Active

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 screenshot shows a 'Contact Search' pop-up form. At the top, there is a section for 'Contact Type' with three radio buttons: Client, Contact (selected), and Professional. Below this are input fields for First Name, Last Name, and Phone. There is also an Email field. A checkbox labeled 'Search by address?' is checked. Below this are input fields for House Number, Street, Borough, City, Apt/Unit, State, and ZIP. A 'Search' button is at the bottom left, highlighted with a red box.

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.

Client ID	Name	Contact Type	Date of Birth	Phone	Email	Related Contact	Home Address	Work Address
☒ 0999006828	Karen Burnett	Client	05/07/1955				262 61ST STREET, BRO...	
☐ 1501452534	Kari Burnett	Client					, NY	
☐ 1501000573	Bryan Cochran	Client	08/10/1949			Kari Burnett (Other)	255 WEST 43RD STREE...	

« First < Previous Showing 1 of 1 Page(s) Next > Last » Total Records: 3

Confirm Selection

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.

To enable the 'New Client' button, confirm that no matching result was found.

☒ Yes, I have reviewed the results and confirm there is no match

New Contact

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.

To enable the 'New Client' button, confirm that no matching result was found.

☒ Yes, I have reviewed the results and confirm there is no match

New Professional

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.

New Contact Relationship

* Client Name: Janetta Q Shields
Related Contact: Harold Jordan
Search Contact

Contact Relationship to Client

*What is Contact relationship to Client? --None--
Contact Type: --None--
Care support type: --None--
This contact: --None--
Emergency Contact: --None--
Status: Active

Client Relationship to Contact

What is Client relationship to Contact? --None--
Contact Type: --None--
Care support type: --None--
This contact: --None--

Cancel Save

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.

New Contact Relationship

* Client Name: Janetta Q Shields
Related Contact: Harold Chin
Search Contact

Client Relationship to Professional

*What is Contact relationship to Client? --None--
Contact Type: --None--
Care support type: --None--
This contact: --None--
Emergency Contact: --None--
Status: Active

Comments

Cancel Save

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**.

The screenshot shows the 'New Contact: Contact' form. It is divided into two main sections: 'Contact Information' and 'Address Information'. The 'Contact Information' section includes fields for Title (a dropdown menu with '--None--' selected), First Name, Middle Initial/Name, Last Name, Date of Birth, Gender (a dropdown menu with '--None--' selected), Email, Cell Phone, Work Phone, Extension, and Home Phone. The 'Address Information' section is partially visible at the bottom. At the bottom right of the form are 'Cancel' and 'Save' buttons.

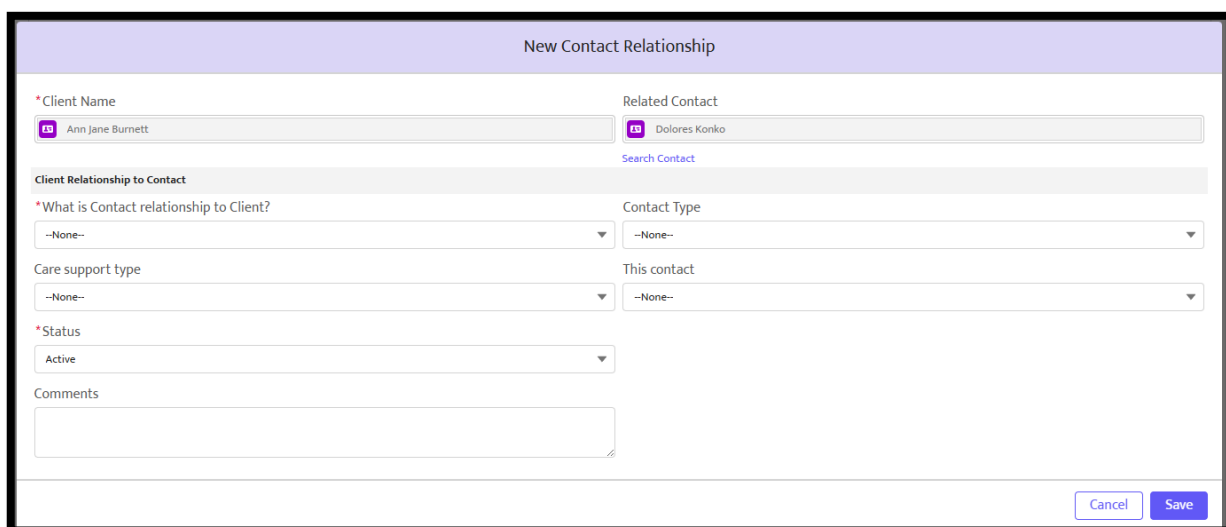
This screenshot focuses on the 'Address Information' section. It shows two search boxes: 'Home Address' and 'Mailing Address', both with 'Search Addresses...' placeholder text and a magnifying glass icon. Below the 'Home Address' search box is a red-bordered button labeled 'New Address'. There is also a checkbox labeled 'Is Mailing Address same as Home Address?'. At the bottom right are 'Cancel' and 'Save' buttons.

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.

The screenshot shows the 'New Address' pop-up. At the top is a search bar with the text '4055 Hylan Boulevard, Stat'. Below the search bar, two address suggestions are listed, each with a location pin icon and a red border around the text: '4055 Hylan Boulevard, Staten Island, NY, United States' and '4055 Hylan Place, Staten Island, NY, United States'. Below the suggestions are several autofill fields: '* Street' (Hylan Boulevard), '* State' (NY), 'Borough' (Staten Island), '* City' (Great Kills), and '* ZIP' (10308). At the bottom right are 'Cancel' and 'Save' buttons.

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



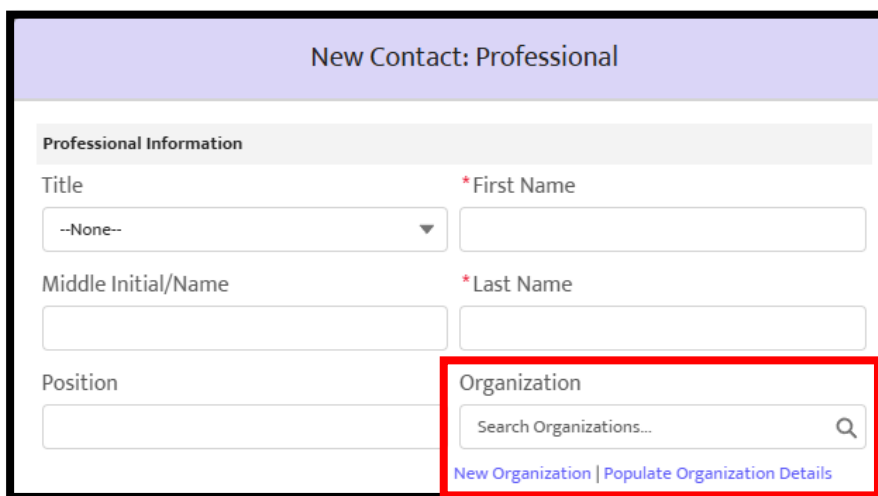
Entering a New Professional Contact

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**



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

Organization.

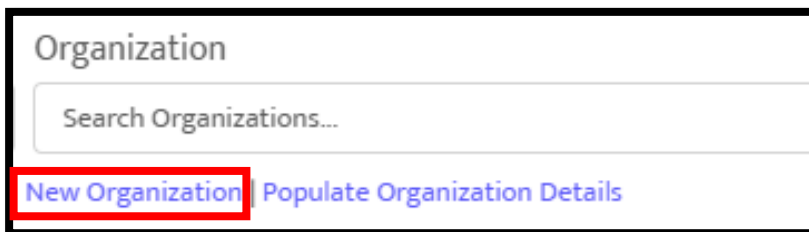


Enter a New Organization

- 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.

VIVÉ Knowledge Base - Contacts

- If the address isn't found, then click on the New Address link.
- Enter the organization's information then select the Save button.



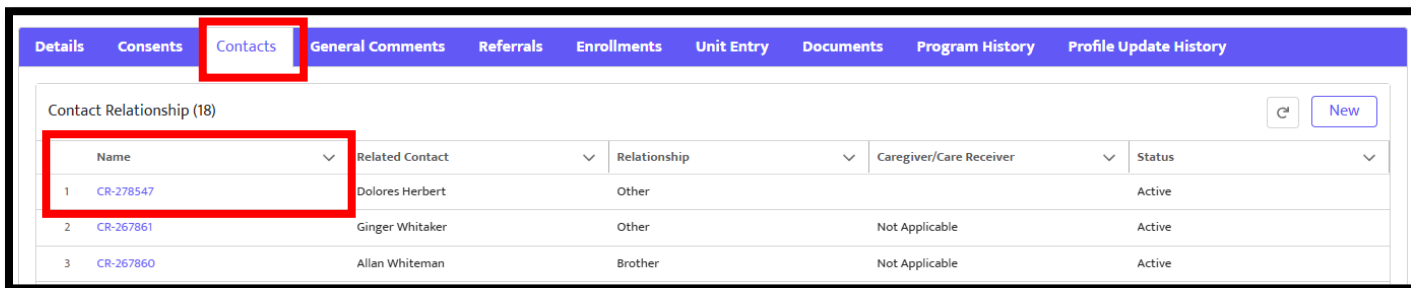
Organization

Search Organizations...

New Organization Populate Organization Details

Editing Contacts

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

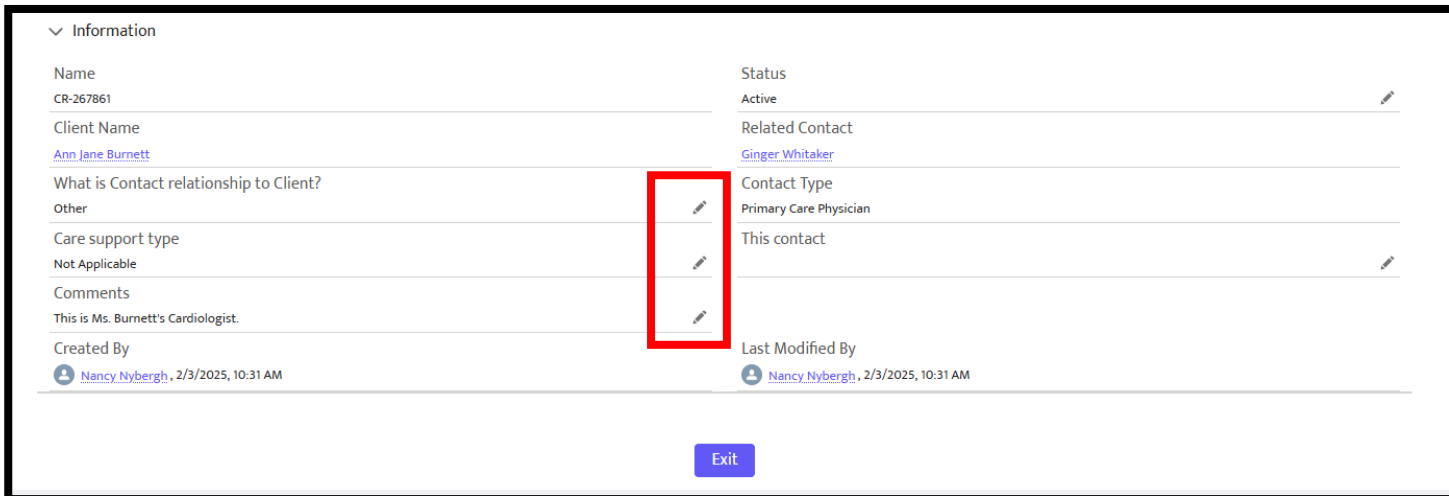


Details Consents **Contacts** General Comments Referrals Enrollments Unit Entry Documents Program History Profile Update History

Contact Relationship (18) 🔍 New

Name	Related Contact	Relationship	Caregiver/Care Receiver	Status
1 CR-278547	Dolores Herbert	Other		Active
2 CR-267861	Ginger Whitaker	Other	Not Applicable	Active
3 CR-267860	Allan Whiteman	Brother	Not Applicable	Active

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.



Information

Name	CR-267861	Status	Active
Client Name	Ann Jane Burnett	Related Contact	Ginger Whitaker
What is Contact relationship to Client?	Other	Contact Type	Primary Care Physician
Care support type	Not Applicable	This contact	
Comments	This is Ms. Burnett's Cardiologist.		
Created By	Nancy Nybergh , 2/3/2025, 10:31 AM	Last Modified By	Nancy Nybergh , 2/3/2025, 10:31 AM

Exit

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

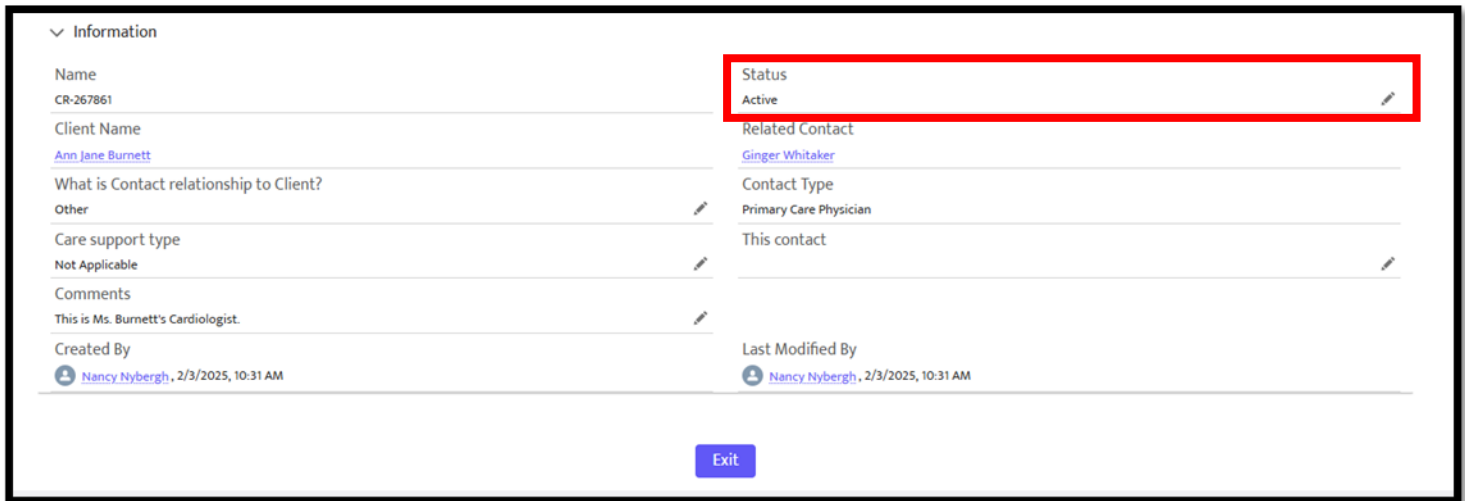
Inactivating a contact has the following impact:

VIVÉ Knowledge Base - Contacts

- 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**.



The screenshot displays the 'Contact Details' form in the VIVÉ system. The form is divided into two main sections: 'Information' on the left and 'Related Contact' on the right. The 'Status' field is highlighted with a red box. The 'Status' field is currently set to 'Active' and has a pencil icon next to it, indicating it can be edited. The 'Related Contact' section shows a list of contacts, with 'Ginger Whitaker' selected. The 'Contact Type' is 'Primary Care Physician'. The 'This contact' section shows 'This contact' with a pencil icon. The 'Created By' and 'Last Modified By' fields both show 'Nancy Nybergh, 2/3/2025, 10:31 AM'. An 'Exit' button is located at the bottom center of the form.

Information	
Name	CR-267861
Client Name	Ann Jane Burnett
What is Contact relationship to Client?	Other
Care support type	Not Applicable
Comments	This is Ms. Burnett's Cardiologist.
Created By	Nancy Nybergh , 2/3/2025, 10:31 AM

Related Contact	
Status	Active
Contact Type	Primary Care Physician
This contact	This contact
Last Modified By	Nancy Nybergh , 2/3/2025, 10:31 AM

Exit

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**.

VIVÉ Events 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, enrolling, removing and other features of **Events**.

Events is a common, core functionality within VIVÉ. There may be some functionality specific to your program, such as entering anonymous units. Guidance on that functionality is within your program's reference guide.

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](#). You can also 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 Programs' Standards](#).

In this guide you will learn:

- **Creating Events**
- **Signing up Clients for an Event**
 - Signing up & Removing Clients via Event Profile
 - Sign up & Removing Clients via Enrollment Details Menu
 - Signing Up Client via QR Code Scan
- **Event Unit Entry**
 - Entering Units from the Events Profile
 - First, create a unit entry.
 - Editing an Existing Unit Entry
 - Enter Units By Scanning QR Codes
- **Entering Anonymous Units for Events**
 - Entering Anonymous Information & Referral Units
 - Entering Anonymous Meal Units
- **Monthly Unit Summary**

Creating Events

Step 1: From the **Top Menu**, click **Program Tools**. Then click the **Event Profile** tab. Then select the **New Event Profile** button.

The screenshot shows the 'Event Profile' tab selected in the top menu. Below the menu, there is a search bar labeled 'Active Event (19)'. To the right of the search bar, the 'New Event Profile' button is highlighted with a red box. Below the search bar, there are several filters: Event Name, Host Type, Event Type, Unit Type, Event Start Date, and Event End Date.

Step 2: Complete the **New Event Profile** pop-up. The required fields are marked with a red asterisk (*).

- **Start Date** can be typed in or you can use the calendar icon to select a date.
- **End Date** is entered when the event will no longer be offered.
- **Event Name** Use clear, yet general, and concise names, e.g. weekday congregate meals.
- **Event Start Time** and **Event End Time** are optional.
- **Host Type** describes where the event took place.
- **Service Type** is critical as it defines the event's unit type.
- **Is this event happening at Program Site?** (*) auto fills the **Location** field when the response is Yes.
- **Location** is auto filled.
- **Unit Type** (*) is auto filled based upon your Service Type selection.
- **Event Capacity** is helpful when hosting an event in a small venue or when a large turnout is expected.
- **Fee Amount** is optional and occasionally used by programs that have a cost associated with an event (i.e. Discounted Broadway tickets).

The screenshot shows the 'New Event Profile' pop-up form. It contains the following fields:

- *Start Date**: Text input with a calendar icon, showing 'Mar 3, 2025'.
- End Date**: Text input with a calendar icon.
- *Event Name**: Text input.
- Status**: Dropdown menu with 'Open' selected.
- Event Start Time**: Text input with a clock icon.
- Event End Time**: Text input with a clock icon.
- *Host Type**: Dropdown menu with '--None--' selected.
- *Service Type**: Dropdown menu with '--None--' selected.
- *Is this event happening at Program Site?**: Dropdown menu with 'No' selected.
- Location**: Text input with a search icon, showing 'Search Addresses...'.
- *Unit Type**: Dropdown menu with '--None--' selected.
- Event Capacity**: Text input.
- Fee Amount**: Text input.

 At the bottom right, there are 'Cancel' and 'Save' buttons.

NOTE: **Unit Type** will vary depending on the **Service Type**. For example, if “Arts and Culture” is selected for **Service Type**, then the **Unit Type** will default to “Event”.

Signing up Clients for an Event

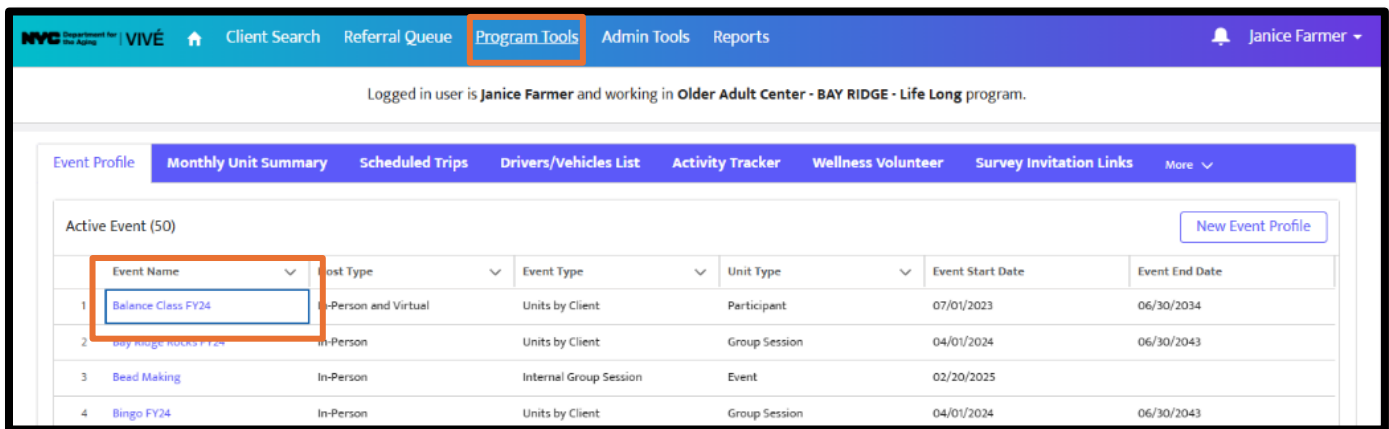
There are three ways to sign up a client enrolled in your program for an event.

- **Events Profile**
- **Enrollment Details** Menu
- **Scan QR Code** feature

Signing up & Removing Clients via Event Profile

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

Step 2: From **Program Tools**, click the **Event Profile** tab. Then click the link to the name of event you wish to manage.



NYC Department for the Aging | VIVÉ

Client Search Referral Queue **Program Tools** Admin Tools Reports

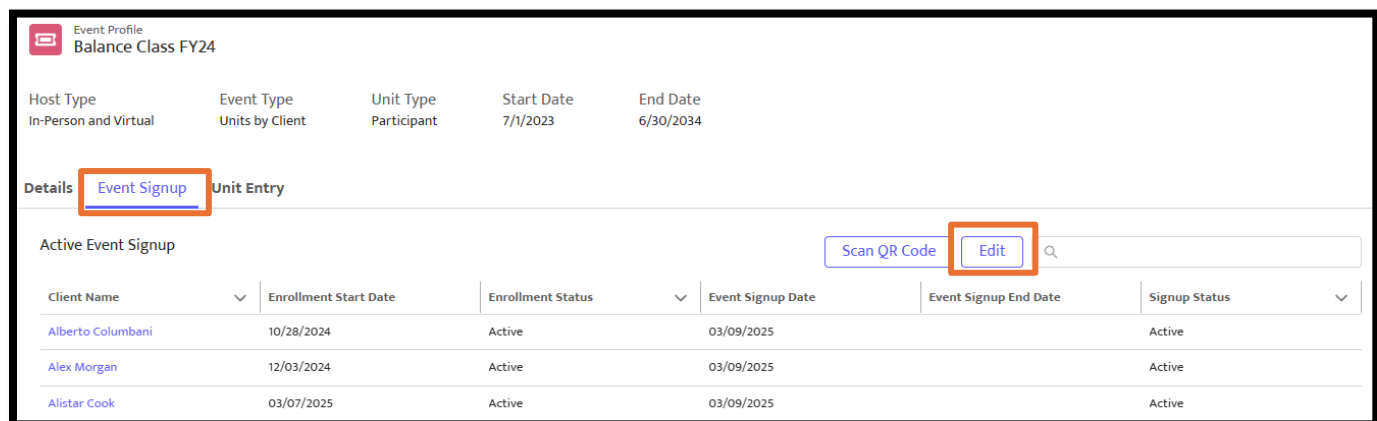
Logged in user is Janice Farmer and working in Older Adult Center - BAY RIDGE - Life Long program.

Event Profile **Monthly Unit Summary** Scheduled Trips Drivers/Vehicles List Activity Tracker Wellness Volunteer Survey Invitation Links More

Active Event (50) [New Event Profile](#)

	Event Name	Host Type	Event Type	Unit Type	Event Start Date	Event End Date
1	Balance Class FY24	In-Person and Virtual	Units by Client	Participant	07/01/2023	06/30/2034
2	Bay Ridge Model Farm	In-Person	Units by Client	Group Session	04/01/2024	06/30/2043
3	Bead Making	In-Person	Internal Group Session	Event	02/20/2025	
4	Bingo FY24	In-Person	Units by Client	Group Session	04/01/2024	06/30/2043

Step 3: Click **Event Signup**.



Event Profile
Balance Class FY24

Host Type: In-Person and Virtual | Event Type: Units by Client | Unit Type: Participant | Start Date: 7/1/2023 | End Date: 6/30/2034

Details **Event Signup** Unit Entry

Active Event Signup [Scan QR Code](#) **Edit**

Client Name	Enrollment Start Date	Enrollment Status	Event Signup Date	Event Signup End Date	Signup Status
Alberto Columbani	10/28/2024	Active	03/09/2025		Active
Alex Morgan	12/03/2024	Active	03/09/2025		Active
Alistar Cook	03/07/2025	Active	03/09/2025		Active

Step 4: On the right you will see two buttons: **Scan QR Code** and **Edit**. Click on **Edit**

Step 5: You will see all the clients that are enrolled in your program with blank boxes to the left of their names. Clients who have already signed up for an event will have their boxes checked. Check the boxes for clients that you would like to sign up for this event.

Details

Event Signup

Unit Entry

Active Event Signup

☒	Client Name	▼	Enrollment Start Date	Enrollment Status	▼	Event Signup Date	Event Signup End Date	Signup Status
☒	Aase I Bye		07/01/2024	Active				
☒	Alberto Columbani		10/28/2024	Active		03/10/2025		Active
☒	Alex Morgan		12/03/2024	Active		03/10/2025		Active
☒	Alistar Cook		03/07/2025	Active		03/10/2025		Active

Step 6: To sign all the members up for an event at the same time, click the box next to **Client Name**

Step 7: When you are done adding clients to the event, click **Save**

- You will return to the **Event Signup** screen. You should be able to view the names of the clients you selected for the events on the **Active Event Signup** list.

Remove Client via Event Profile

To remove a client from that event, uncheck the box to the left of their name.

TIP You can always go back into the client's record to add, remove, or make updates to an event.

Sign up & Removing Clients via Enrollment Details Menu

Step 1: From the **Top Menu**, click **Client Search**, find the desired client and click their name link. Click the **Enrollments** tab and then the desired Enrollment Name link.

Step 2: From the **Enrollments Details Menu**, select **Event Signup**. Then click the **Event Signup** tab. A list will appear displaying the events the client is actively signed up for and those that have been inactivated.

Step 3: Click the **Edit** button to start the signup process.

Step 4: A list of all your **Events** created (both **Active** and **Inactive**) will display with boxes to the left of each event name. Check the box to the left of Event Name to select all events.

Enrollment Details

Forms

Event Signup

Case Notes

Unit Entry

Follow up

Contacts

Documents

Status History

Active Event Signup

☒	Event Name	Host Type	Event Type	Unit Type	Event Start Date	Event End Date	Event Signup Date	Event Signup End...	Signup Status
☒	Active Exercises FY...	In-Person	Units by Client	Participant	12/01/2024	06/30/2043			
☒	Afternoon Movies ...	In-Person	Units by Client	Group Session	07/01/2024	06/30/2043			
☒	Art Pratt / MISC FY...	In-Person	Internal Group Ses...	Group Session	09/01/2024	06/30/2043			
☒	Arts and Crafts	In-Person	Internal Group Ses...	Event	03/11/2025				
☒	Balance Class FY24	In-Person and Virt...	Units by Client	Participant	07/01/2023	06/30/2034			

If the client is signed up for an event, the box to the left of the event name will be checked.

Step 5: Click the check box to sign a client up for the event. Select **Save** at the bottom of the page.

Removing Client via Enrollment Details

To remove a client from that event, uncheck the box to the left of their name.

Signing Up Client via QR Code Scan

Scanning a client's QR Code using a mobile device with a camera, such as a tablet, streamlines the process. QR Code scanning is done via a browser; Chrome or MS Edge are best.

NOTE: The client needs to be enrolled in your program before using the QR Code scanning.

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

NYC Department for the Aging

VIVÉ

Client Search

Referral Queue

Program Tools

Account

Logged in user is **Janice Farmer** and w

Event Profile

Monthly Unit Summary

Scheduled Trips

Drivers/Vehicles

Active Event (50)

	Event Name	Event Type	Event Type
1	Balance Class FY24	In-Person and Virtual	
2	Bay Bridge Hikes &...	In-Person	
3	Bowl Making	In-Person	
4	Bingo FY24	In-Person	

Event Profile

Balance Class

Host Type

In-Person and Virtual

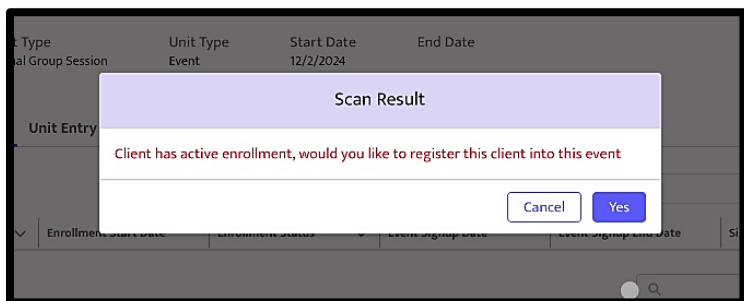
Step 2: From **Program Tools**, click **Event Profile**. Then click the link to the name of the event you wish to view.

Step 3: Click **Event Signup** link. Then select **Scan QR Code** button. ([More information on QR Code Scanning](#))

Event Profile Balance Class FY24					
Host Type	Event Type	Unit Type	Start Date	End Date	
In-Person and Virtual	Units by Client	Participant	7/1/2023	6/30/2034	
Details Event Signup Unit Entry					
Active Event Signup					
Client Name	Enrollment Start Date	Enrollment Status	Event Signup Date	Event Signup End Date	
Alberto Columbani	10/28/2024	Active	03/09/2025		
Alex Morgan	12/03/2024	Active	03/09/2025		
Alistar Cook	03/07/2025	Active	03/09/2025		

Step 4: A window pane appears showing the image from the back facing camera of your device. Maneuver the camera so that the member's ID card is clearly within the windowpane.

Step 5: From the **Scan Result** pop-up, confirm signing client up for this event by selecting **Yes**.



Event Unit Entry

Once you have created and signed clients up for an event, you will be able to enter units for clients who have attended the event. (For more information see guide [Unit Entry](#)).

There are three ways to add units to an event:

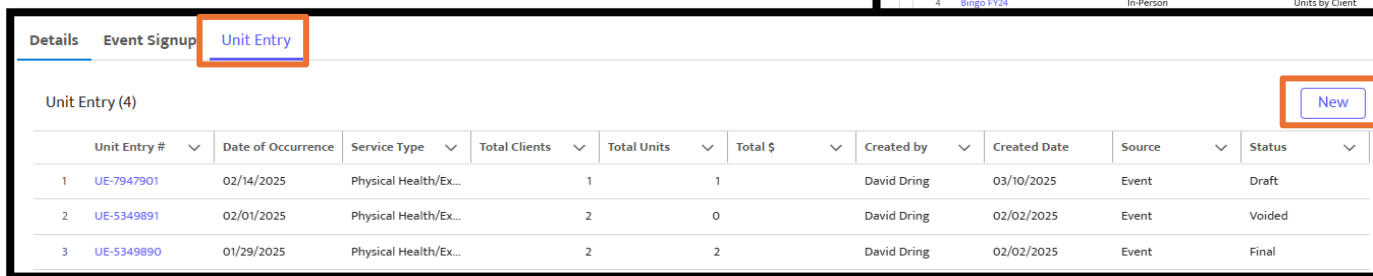
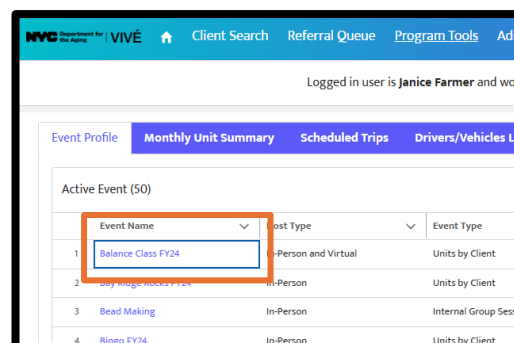
- Entering units from the **Events Profile** (good for entering units quickly for multiple clients).
- Entering a unit for a client from the **Enrollment Details** Menu.
- By using the **Scan QR Code** feature (most accurate way to enter units).

Entering Units from the Events Profile

First, create a unit entry.

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

Step 2: From **Program Tools**, click **Event Profile**. Then click the link to the name of event you wish to manage.



Step 3: Click **Unit Entry**. Then select the **New** button.

Step 4: From the **Unit Entry Details** page, add the date the event occurred. This can be backdated.

Step 5: Either browse through the list of signed up clients or use the filter to find the client you want to check attended.

Step 6: Either enter the units using the Auto Fill or individually by client.

Name	Date of Birth	Gender	Home Address	Enrollment Status	Funding Source	Units	Amount	Attended?
Alberto Columbani	02/19/1959		8402 4TH AVE, B-7, BROOKLYN, NY 11209	Active	NYC Aging Funded Service	1	0	☒
Alex Morgan	12/31/1944		10 READE STREET, MANHATTAN, NY 10007	Active	Discretionary Funded	1	0	☒
Alistar Cook	03/02/1944		455 GERARD AVENUE, 7, BRONX, NY 10451	Active	--None--	0	0	☐
Amy Adams	12/31/1949		15 BAY RIDGE AVENUE, 5B, BROOKLYN, NY 11220	Active	--None--	0	0	☐
Katie Client	12/31/1949		541 EAST 20TH STREET, 3B, MANHATTAN, NY 10010	Active	NYC Aging Funded Service	1	0	☒

- Enter Funding Source, Units and Amount (optional) then select **Auto Fill** if it is the same for everyone. 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

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, select the Unit Entry # Link. That will take you to the Unit Entry Details page. From there you can change the details, 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 Status types:

- **Draft:** This unit is still editable.

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

Enter Units By Scanning QR Codes

QR Code scanning allows real-time access to information on the clients participating in your activities. The process of scanning a client into a pre-selected event, confirming them and then associating the funding and unit value reduces discrepancies with unit reconciliation.

Step 1: From the Top Menu, click Program Tools, then the Event Profile tab.

Step 2: Click on the event you want to scan clients into.

Step 3: From the Event details page, click on Unit Entry.

Unit Entry (5)

Unit Entry #	Date of Occurrence	Service Type	Total Clients	Total Units	Total \$	Created by	Created Date	Source	Status
UE-7947902	03/10/2025	Physical Health/Ex...	2	2	\$0.00	David Dring	03/10/2025	Event	Draft
UE-7947901	02/14/2025	Physical Health/Ex...	1	1		David Dring	03/10/2025	Event	Draft

Step 4: Click on a Unit Entry # link or select the **New** button.

Step 5: Select the Scan QR Code button to initiate scanning.

Unit Entry

Event Details

Event Profile: Balance Class FY24

Event Location:

Fee Amount: \$0.00

Event Type: Units by Client

Unit Type: Participant

Event Manager:

Unit Entry Details

* Date of Occurrence: Mar 10, 2025

* Status: Draft

Total Units: 2.00

Total \$: 0.00

Filter & Auto Fill

Name:

Funding Source: --None--

Units: 0

Amount: 0

Select all Attended? ☐

Step 6: A windowpane appears showing the image from the back facing camera. Maneuver the camera so that the member's ID card is clearly within the windowpane.



Step 5: If the client's QR Code is recognized, a confirmation pop-up will appear. From this pop-up you can Cancel, Rescan, view the client's details or Mark Attendance.

TIP: It is best to use a tablet, PC, or laptop to enroll a client to an event when utilizing the Scan QR Code feature due to the large amount of information that will display on the screen.

If the Client's QR Code is not recognized because the client is not enrolled in the program, a pop-up will appear telling the user to complete the enrollment process.

Scan Result

Client is not enrolled in the program, please complete the enrollment process to register client for this event

Cancel

Step 7: If you select the **Mark Attendance** button, a pop-up will appear to finalize the unit entry.

Client Details

Event Name:

First Name: Janetta

Last Name: Shields

Client ID: 0000000103

DOB: 3/22/1935

Phone: 2126024459

Email:

Home Address: 300 EAST 5TH STREET, MANHATTAN, NY 10003

Mailing Address:

Cancel
Re-Scan
Client Details
Mark Attendance

Step 8: Either enter the Funding Source, Units and Amount here and select Save; or select Save and enter this information on the Unit Entry page.

Enter Client Information

Funding Source

--None--
▼

Units

0

Amount

0

Cancel
Save

Tip: If the client is not enrolled in your program, you have the option to create a new enrollment. Once client enrollment is created, you can sign the client up for an event.

Entering Anonymous Units for Events

There are two Service Types for which you can enter anonymous units: Information & Referral and Congregate Meals. As such, you will only see an Anonymous Units field on these screens. **Creating Anonymous clients is no longer allowed.**

TIP: You may want to name your Information Referral events like I&R Housing or I&R SCRIE to differentiate the types of I&R you provide.

Entering Anonymous Information & Referral Units

Step 1: From the Top Menu, click Program Tools. From Program Tools, click the Event Profile tab.

Step 2: Click on the event you created for Information Referral.

Step 3: From the event details, click on the Unit Entry link.

Step 4: Select the New button.

Step 5: Enter the number of Anonymous units provided that day.

Unit Entry

Event Details

Event Profile

I&R - HEAP

Event Location

15 BAY RIDGE AVENUE, BROOKLYN, NY 11209

Fee Amount

Event Type

Units by Client

Unit Type

Contact

Event Manager

Unit Entry Details

* Date of Occurrence

Mar 16, 2025

* Status

Draft

Total Units

Total \$

Anonymous Units

Entering Anonymous Meal Units

Step 1: From the Top Menu, click Program Tools. From Program Tools, click the Event Profile tab.

Step 2: Click on the event you created for meals, such as Congregate Meals.

Step 3: From the event details, click on the Unit Entry link.

Step 4: Select the New button.

Step 5: Enter the number of Anonymous units provided that day.

NOTE: There are no anonymous clients allowed.

Entering Meals Provided for Other Eligible Seniors, Ineligible Meals and Eligible Volunteers

Keeping Track of Other Types of Meals Provided: When entering units for a congregare meal event, you are able to enter the number of meals provided to volunteers, other eligible seniors and guests and staff under 60 by filling in those fields.

Monthly Unit Summary

The Monthly Unit Summary summarizes units recorded by service type in a month. Once you have confirmed these amounts, you must finalize the report. **Once a report is finalized, units can no longer**

be entered or edited. If you need to unlock the Monthly Unit Summary, contact your program officer.

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

Name	Month	Year	Created Date	Status
MUS-000070	February	2025	02/04/2025	Draft
MUS-000057	December	2024	01/10/2025	Final

Step 2: Click on either a Name link or the **New** button. **Step 3:** If you select the **New** button, you must select the month and year. Then click **Calculate Units** for that period.

Monthly Unit Summary

*Program: Older Adult Center - BAY RIDGE - Life Long

*Status: Draft

*Month: March

*Year: 2025

Total Cost Center Amount

Calculate Units

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

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**.

The VIVÉ Referral 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, accessing and managing Referrals.

Referrals 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](#). You can also 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 Programs' Standards](#).

In this guide you will learn:

- **Overview of Referrals**
- **Viewing Referrals**
- **Referral Details**
 - Accepting an Enrollment
 - Rejecting an Enrollment
 - Cancelling a Referral
 - Referral Notes
- **Making a Referral**
 - Completing Consent to Refer

Overview of Referrals

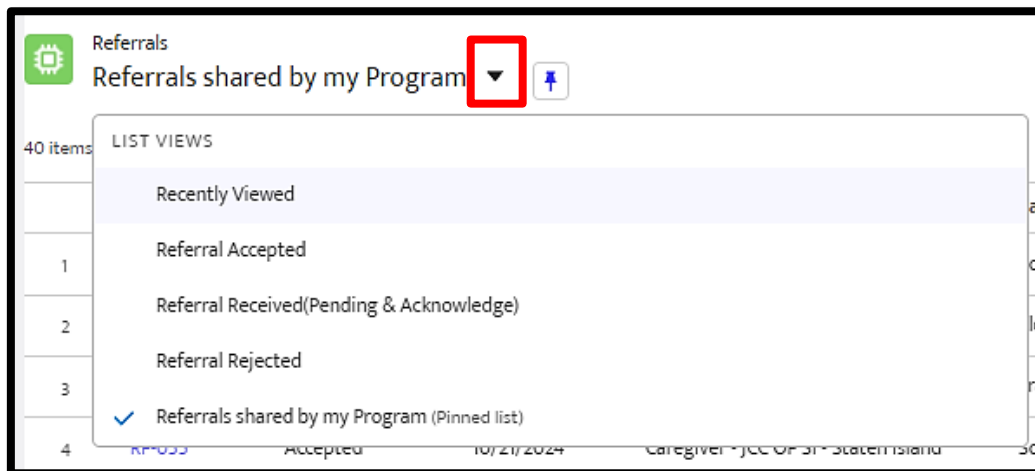
The **Referral Queue** enables users to view and manage referrals. Users are able to refer a client from one NYC Aging program to another. Each program has different places (targets) that they can refer a client. Referrals can be in various states: sent, pending, acknowledged (reviewed by the target program, but not yet approved), approved or rejected.

Viewing Referrals

The referral queue can be accessed from the **Top Menu**.



The Referral Queue displays referrals based upon status. You can pin your default view.



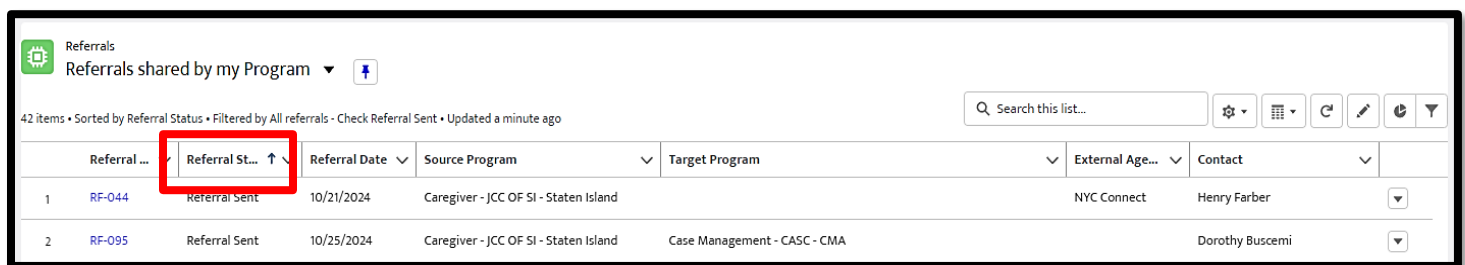
Users can narrow the referral search by filtering by the type or status of referral. These are the referral types in VIVÉ:

- **Recently Viewed** referrals have been

opened and viewed by the receiving program. However, no action has been taken on the referral.

- **Referral Accepted** indicates that the receiving program has viewed the referral and determined that the client will receive services.
- **Referral Received** (Pending & Acknowledge) has not been opened or viewed by the receiving program, and no action has been taken.
- **Referral Rejected** indicates that the receiving program has viewed the referral and determined that the client will not receive services.
- **Referrals Shared by my Program** (Pinned List) are filtered by Program only, which helps to further narrow the search.

Once a list view is selected, referrals can be sorted by column headings. Note the upward arrow next to the Referral Status.



Referral Details

The **Referrals Details** page displays information such as Referral Status, Source Program, Services Requested and who created the referral.

Upon receiving a new referral, the program can Acknowledge, Accept or Reject a referral.

- **Acknowledge:** the user acknowledges the referral.

- **Accept:** the user accepts the referral for services.
- **Reject:** the user rejects the referral, and the client will not receive services.

Referral RF-84483

[Acknowledge](#) [Accept](#) [Reject](#)

[Referral Details](#) [Notes](#)

Referral Information

Referral Name RF-84483	Referral Status Referral Sent
Referral Date 3/13/2025	Contact Bill Cipher
Source Program Elder Justice - NSHOPP - Bronx North	Target Program Older Adult Center - BAY RIDGE - Life Long
Is for external agency? ☐	External Agency Name
Referral Comments	

Services Requested

Friendly Visiting

System Information

Created By Eva Amigon	Last Modified By Eva Amigon
Created Date 3/13/2025, 9:27 AM	Last Modified Date 3/13/2025, 9:27 AM

Accepting an Enrollment

If the user selects the **Accept** button, the user is prompted to enroll the client into their program. The button changes to **Go to Enrollment**.

Referral RF-051

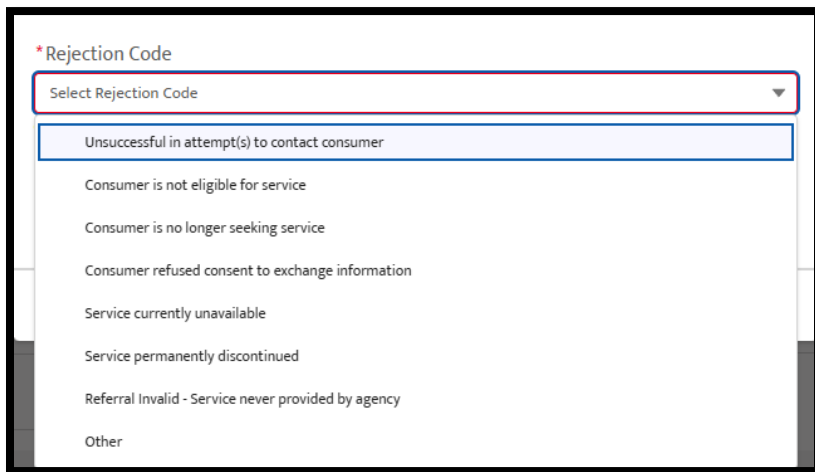
[Go to Enrollment](#)

[Referral Details](#) [Notes](#)

Referral Information

Rejecting an Enrollment

If the target program is unable to provide the requested services, then after selecting the **Reject** button the user must indicate the rejection code and reason.



A screenshot of a web form showing a dropdown menu for "Rejection Code". The dropdown is open, displaying a list of rejection reasons. The first option, "Unsuccessful in attempt(s) to contact consumer", is highlighted. Other options include "Consumer is not eligible for service", "Consumer is no longer seeking service", "Consumer refused consent to exchange information", "Service currently unavailable", "Service permanently discontinued", "Referral Invalid - Service never provided by agency", and "Other".

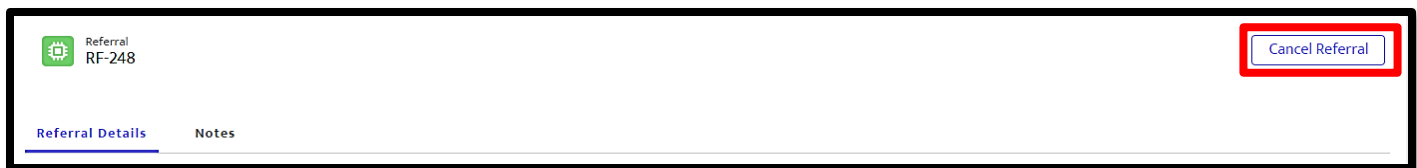
* Rejection Code

Select Rejection Code

- Unsuccessful in attempt(s) to contact consumer
- Consumer is not eligible for service
- Consumer is no longer seeking service
- Consumer refused consent to exchange information
- Service currently unavailable
- Service permanently discontinued
- Referral Invalid - Service never provided by agency
- Other

Cancelling a Referral

Referrals that have not yet been accepted/rejected may be cancelled by the source program.



A screenshot of the "Referral RF-248" details page. The page has two tabs: "Referral Details" and "Notes". In the top right corner, there is a button labeled "Cancel Referral" which is highlighted with a red rectangle.

Referral RF-248

Cancel Referral

Referral Details Notes

Referral Notes

All referrals have a **Notes** tab. These notes are seen by both the source and target programs. A user may search and filter the notes of this specific referral.



A screenshot of the "Referral RF-044" page, specifically the "Notes" tab. The "Notes" tab is highlighted with a red rectangle. Below the tabs, there are search and filter options: "From" and "To" date pickers, and a "Filter" button. Below these are "New Note" and "Print Notes" buttons. At the bottom, there is a table with columns: "Event Date", "Subject", "Comments", "Created By", "Last Modified By", and "Program Name".

Referral RF-044

Referral Details Notes

From To Filter

Notes (0) New Note Print Notes

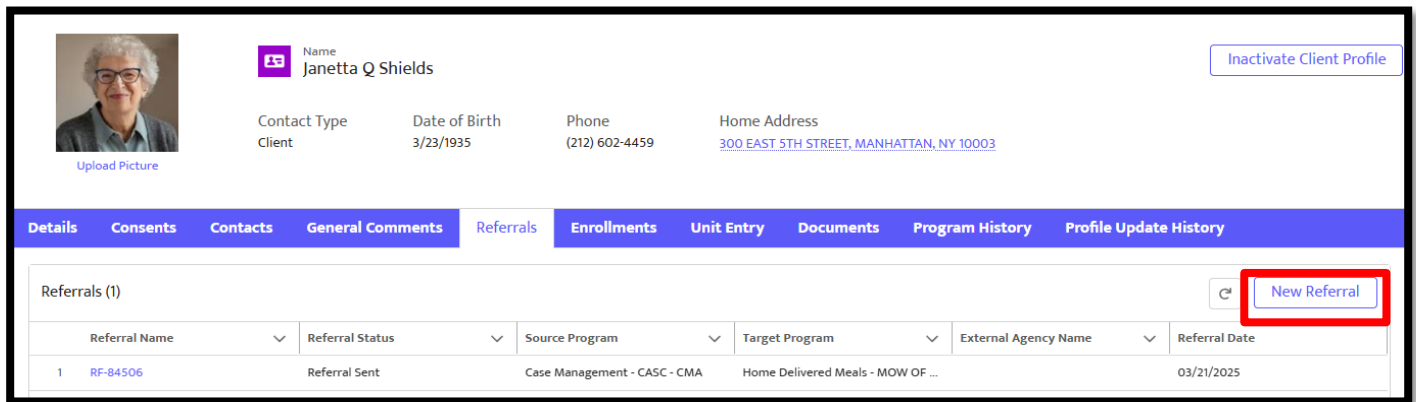
Event Date	Subject	Comments	Created By	Last Modified By	Program Name
------------	---------	----------	------------	------------------	--------------

Making a Referral

Referrals are made from the **Details** menu.

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

Step 2: Select the **New Referral** button.



Client Profile: Janetta Q Shields

Upload Picture

Contact Type: Client | Date of Birth: 3/23/1935 | Phone: (212) 602-4459 | Home Address: 300 EAST 5TH STREET, MANHATTAN, NY 10003

Inactivate Client Profile

Details | Consents | Contacts | General Comments | **Referrals** | Enrollments | Unit Entry | Documents | Program History | Profile Update History

Referrals (1)

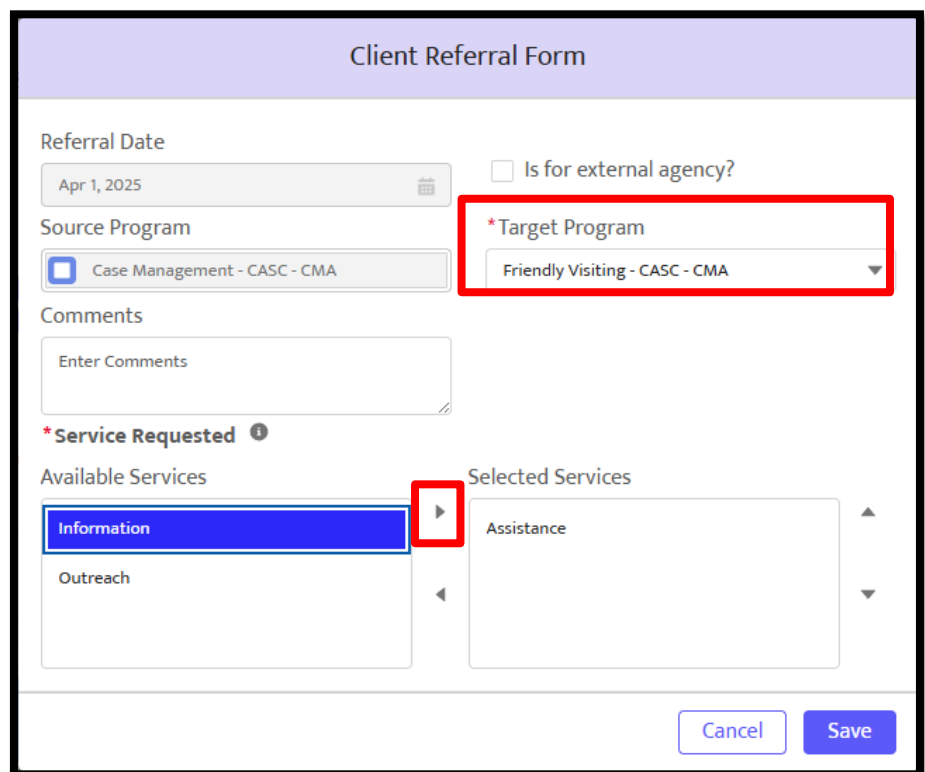
Referral Name	Referral Status	Source Program	Target Program	External Agency Name	Referral Date
1 RF-84506	Referral Sent	Case Management - CASC - CMA	Home Delivered Meals - MOW OF ...		03/21/2025

New Referral

Step 3: From the **Client Referral Form**, select the Target Program first. Depending upon the Target Program, the Available Services will be populated with program specific options.

Step 4: Click on a desired Available Service and then select the right facing triangle to inform the Target Program of client's needs.

Step 5: Select **Save**.



Client Referral Form

Referral Date: Apr 1, 2025

Source Program: Case Management - CASC - CMA

☐ Is for external agency?

***Target Program**: Friendly Visiting - CASC - CMA

Comments: Enter Comments

***Service Requested**

Available Services: Information, Outreach

Selected Services: Assistance

Cancel | Save

Completing Consent to Refer

If the client has not been referred to a Target program before, then a Consent to Refer document must be signed and uploaded. The Consent to Refer document only needs to be completed once per agency.

When there is no consent, then an error message will appear as well as a button to complete the Consent to Refer process.

You will be sent to the **New Consent** pop-up and the Consent Type will be prepopulated with Consent to Refer.

Click **Save** and return to the **Client Referral** pop-up to click Save and submit the referral.

The screenshot displays the 'NEW REFERRAL FORM' interface. At the top, a red error banner reads: 'A consent to refer is required. Please click on Create below.' The form fields include: 'Referral Date' (set to Apr 1, 2025), 'Source Program' (Case Management - CASC - CMA), 'Is for external agency?' (checkbox), '*Target Program' (Friendly Visiting - CASC - CMA), 'Comments' (text area), and '*Service Requested' (Information). Below these are 'Available Services' (Information, Outreach) and 'Selected Services' (Assistance). At the bottom, three buttons are visible: 'Create Consent to Refer' (highlighted with a red box), 'Cancel', and 'Save'.

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**.

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:

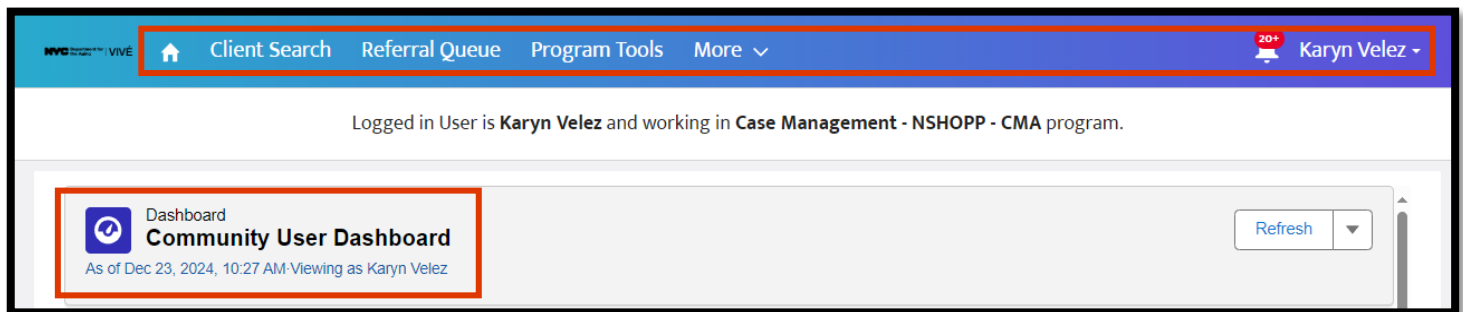
- **A Dashboard Overview**
 - The Top Menu Navigation
 - Notifications
 - User Name Profile
 - Refresh Button
- **My Enrollments**
 - Accessing the Client Profile
 - Accessing Enrollment Menu
- **My Follow-Ups**
 - Accessing the Follow-Up Request Screen
- **My Tasks**
 - Accessing the Task Details

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.

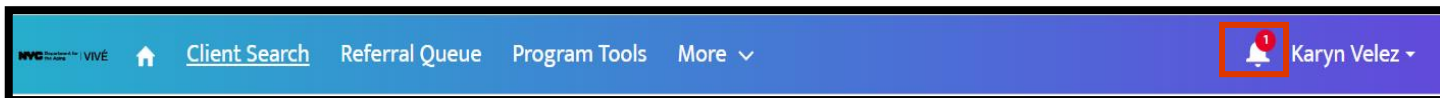


These are the critical links from the **Top Menu**:

- **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 functionality 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.

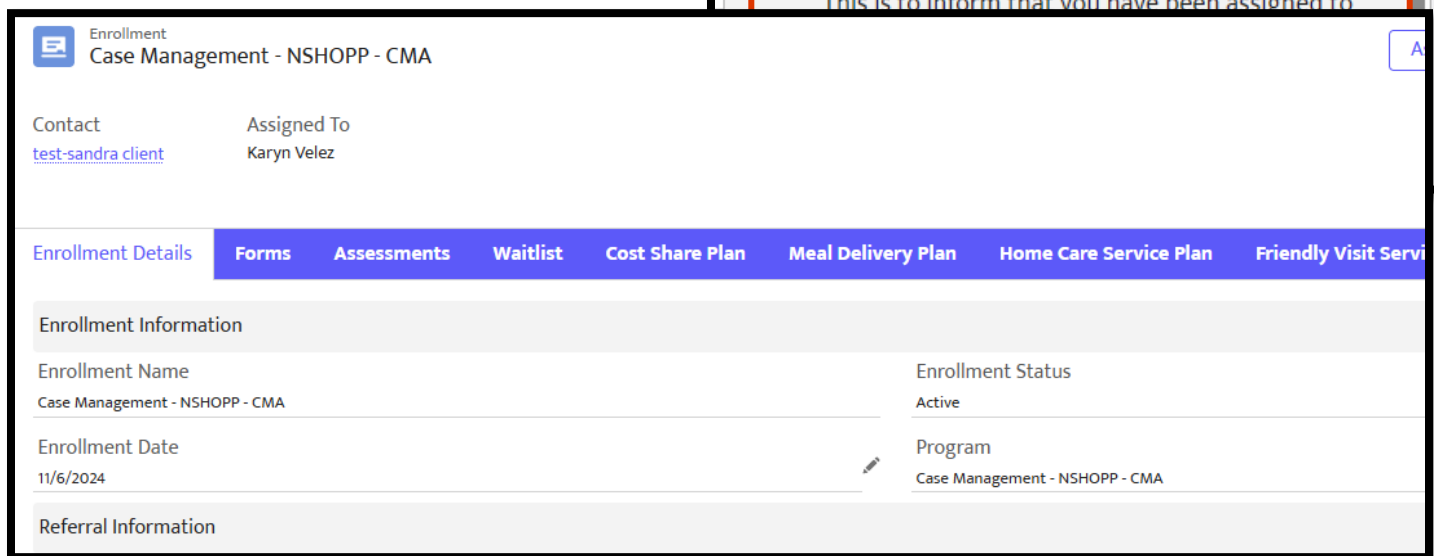
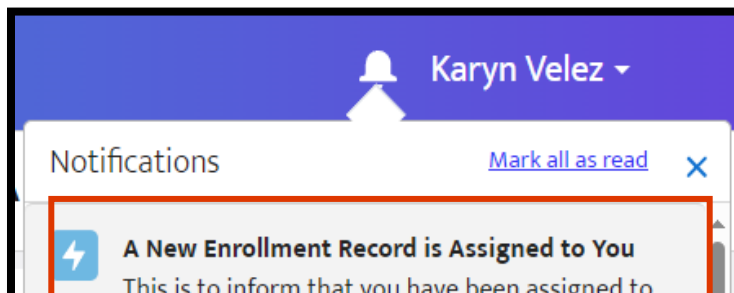


To view and access **Notifications**:

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.

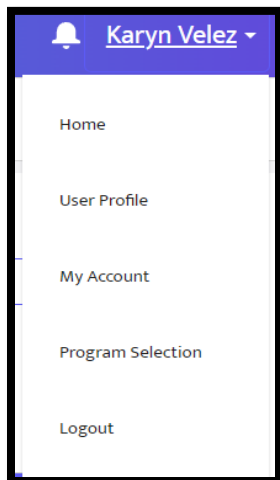


Notifications are ordered so that the most recent one appears at the top of the list. If you want to view others, scroll down.

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:



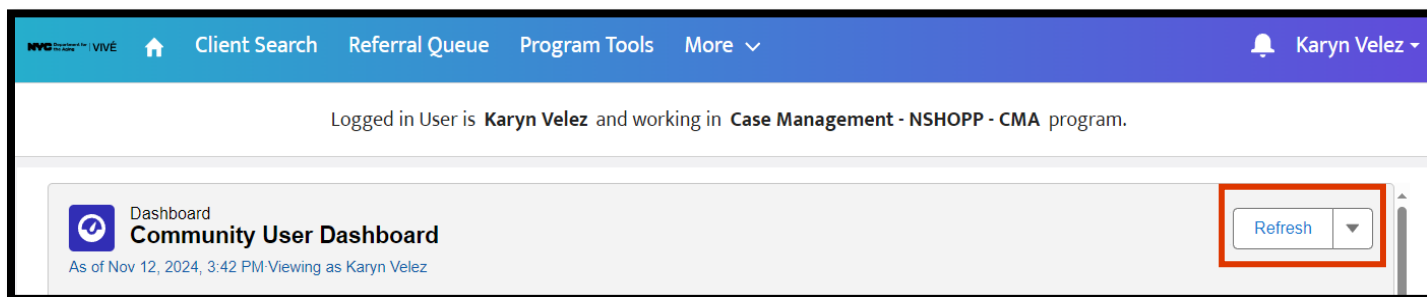
- **Home** – This functionality is used to bring you back to the **Dashboard** from any screen page in VIVÉ.
- **User Profile** – This functionality provides access to information about you including your 1) title, 2) supervisor’s name, 3) email address, 4) company name, telephone number and address 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 directly 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**).

Dashboard
Community User Dashboard
As of Nov 27, 2024, 2:36 PM Viewing as Karyn Velez

Refresh ▼

My Enrollments

Contact ↑	Enrollment: Enrollment Name	Enrollment Status	Enrollment Date	Service Start Date
test-joe client	Case Management - NSHOPP - CMA	Active	10/29/2024	10/29/2024
test-june client	Case Management - NSHOPP - CMA	Inactive	12/7/2023	11/12/2024
test-peter client	Case Management - NSHOPP - CMA	Inactive	11/12/2024	11/12/2024
test-roger client	Case Management - NSHOPP - CMA	Inactive	11/8/2024	11/8/2024
test-sandra client	Case Management - NSHOPP - CMA	Active	11/6/2024	11/6/2024
test-von client	Case Management - NSHOPP - CMA	Active	11/27/2024	11/27/2024

View Report (My Enrollments)

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.

Name
test-sandra client

ID
0999001577

Status
Active

Contact Type
Client

Upload Picture

Inactivate Client Profile

Details
Consents
Contacts
General Comments
Referrals
Enrollments
Unit Entry
Documents
More ▼

[Basic Demographics](#)
Social Demographics
Emergency Preparedness
Financial
NYSOFA Additional Info

My Enrollments				
Contact ↑	Enrollment: Enrollment Name	Enrollment Status	Enrollment Date	Service Start Date
test-joe client	Case Management - NSHOPP - CMA	Active	10/29/2024	10/29/2024
test-june client	Case Management - NSHOPP - CMA	Inactive	12/7/2023	11/12/2024
test-peter client	Case Management - NSHOPP - CMA	Inactive	11/12/2024	11/12/2024
test-roger client	Case Management - NSHOPP - CMA	Inactive	11/8/2024	11/8/2024
test-sandra client	Case Management - NSHOPP - CMA	Active	11/6/2024	11/6/2024
test-von client	Case Management - NSHOPP - CMA	Active	11/27/2024	11/27/2024

View Report (My Enrollments)

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

Contact
test-sandra client

Assigned To
Karyn Velez

Enrollment Details

Forms

Assessments

Waitlist

Cost Share Plan

Meal Delivery Plan

Home Care Service Plan

More ▾

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

My Follow-Ups

My Enrollments				
Contact ↑	Enrollment: Enrollment Name	Enrollment Status	Enrollment Date	Service Start Date
test-joe client	Case Management - NSHOPP - CMA	Active	10/29/2024	10/29/2024
test-june client	Case Management - NSHOPP - CMA	Inactive	12/7/2023	11/12/2024
test-peter client	Case Management - NSHOPP - CMA	Inactive	11/12/2024	11/12/2024
test-roger client	Case Management - NSHOPP - CMA	Inactive	11/8/2024	11/8/2024
test-sandra client	Case Management - NSHOPP - CMA	Active	11/6/2024	11/6/2024
test-von client	Case Management - NSHOPP - CMA	Active	11/27/2024	11/27/2024

View Report (My Enrollments)

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.

My Follow-Ups			
Enrollment: Enrollment Name ↑	Follow up Request: Subject	Status	Client Name
Case Management - NSHOPP - CMA	Caregiver Information for Daughter	Open	test-sandraclient
Case Management - NSHOPP - CMA	Benefit and Entitlements Questions	Open	test-joeclient
View Report (My Follow-Ups)			

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**.

 Follow up Request
Benefit and Entitlement Call

Edit Assigned To

Subject
Benefit and Entitlement Call

Reason
Client interested in applying for certain programs.

Status
Open

Created By
Karyn Velez

Assigned To
Karyn Velez

Follow-Up Date
11/11/2024, 1:00 PM

Enrollment
Case Management - NSHOPP - CMA

Last Modified By
Karyn Velez

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

My Follow-Ups			
Enrollment: Enrollment Name ↑	Follow up Request: Subject	Status	Client Name
Case Management - NSHOPP - CMA	Caregiver Information for Daughter	Open	test-sandraclient
Case Management - NSHOPP - CMA	Benefit and Entitlements Questions	Open	test-joeclient
View Report (My Follow-Ups)			

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					
Task: Task Number ↑	Subject	Program: Program Name	Task Status	Actions	Priority
T-00002	Client Re-assessment	Case Management - NSHOPP - CMA	Open	-	Normal
T-00003	Client Re-assessment	Case Management - NSHOPP - CMA	Open	-	Normal
View Report (My Tasks)					

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.

My Tasks

Task: Task Number ↑	Subject	Program: Program Name	Task Status	Actions	Priority
T-00002	Client Re-assessment	Case Management - NSHOPP - CMA	Open	-	Normal
T-00003	Client Re-assessment	Case Management - NSHOPP - CMA	Open	-	Normal

View Report (My Tasks)

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

Task T-00002

Details

Task Number T-00002	Subject Client Re-assessment
Task Status Open	Assessment AS-00072
Priority Normal	Actions
Did you Speak with the client ?	Program Case Management - NSHOPP - CMA
Created Date 12/18/2024, 1:11 PM	Last Modified Date 12/18/2024, 1:11 PM
Last Modified By Tej Kum	

Exit

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.

Task
T-00002

Details

* = Required Information

Task Number T-00002	Subject Client Re-assessment
Task Status Closed	Assessment AS-00072
Priority Normal	* Actions Re-Assessment completed
Did you Speak with the client ? Yes	Program Case Management - NSHOPP - CMA
Created Date 12/18/2024, 1:11 PM	Last Modified Date 12/18/2024, 1:11 PM
Last Modified By Tej Kum	

Cancel Save

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**.

The VIVÉ Documents 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 adding, viewing, and editing documents.

Documents 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:

- **Overview of Documents**
- **Navigating to Documents**
 - Details Menu: Client Profile
 - Enrollment Details Menu
- **Adding Documents**
 - Access Level
 - Upload Files
- **Viewing / Editing Documents**
 - View Documents
 - Edit Document Status

If you have any questions, please contact the VIVÉ Application Support Center via VIVESupport@aging.nyc.gov.

Overview of Documents

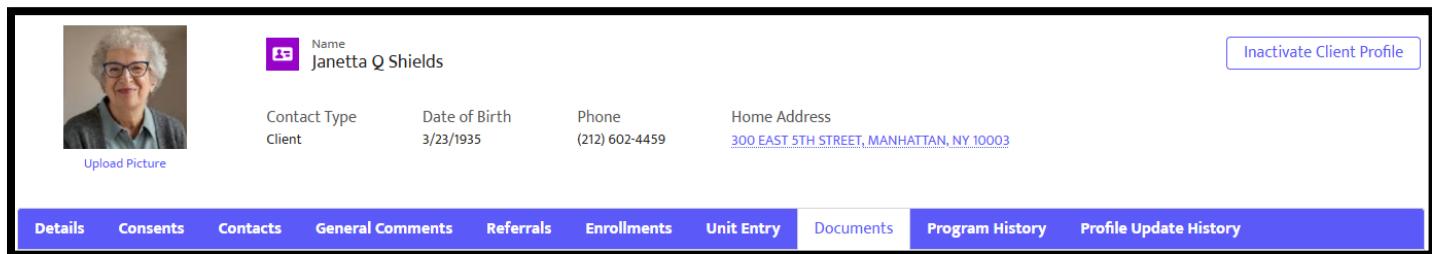
Documents featured in VIVÉ provides the ability for you to add, edit, and view a record of various document types associated with a client's file by uploading them into the database.

Navigating to Documents

The Documents tab is located on the Details Menu: Client Profile and Enrollment Details Menu.

Step 1: Click Documents tab from Details Menu: Client Profile or Enrollment Details Menu.

Details Menu: Client Profile



The screenshot displays the VIVÉ client profile interface. At the top left is a client photo of an elderly woman with the caption 'Upload Picture'. To the right, the name 'Janetta Q Shields' is shown next to a purple ID icon. A button labeled 'Inactivate Client Profile' is in the top right corner. Below the name, client details are listed: 'Contact Type: Client', 'Date of Birth: 3/23/1935', 'Phone: (212) 602-4459', and 'Home Address: 300 EAST 5TH STREET, MANHATTAN, NY 10003'. At the bottom, a blue navigation bar contains several tabs: 'Details', 'Consents', 'Contacts', 'General Comments', 'Referrals', 'Enrollments', 'Unit Entry', 'Documents' (which is highlighted), 'Program History', and 'Profile Update History'.

Enrollment Details Menu

Adding Documents

Adding client documentation follows the same procedure whether the upload is being done on the **Client Profile** or **Enrollment Details Menu**. Let's take a closer look at how to upload Documents to a client's file from the **Client Profile**. (For more information on [Client Profile](#) and [Enrollments](#).)

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

Step 2: From the **Details Menu: Client Profile**, click the **Documents** tab. The **Documents** List View will appear denoting the number of documents that have been uploaded to the client's file.

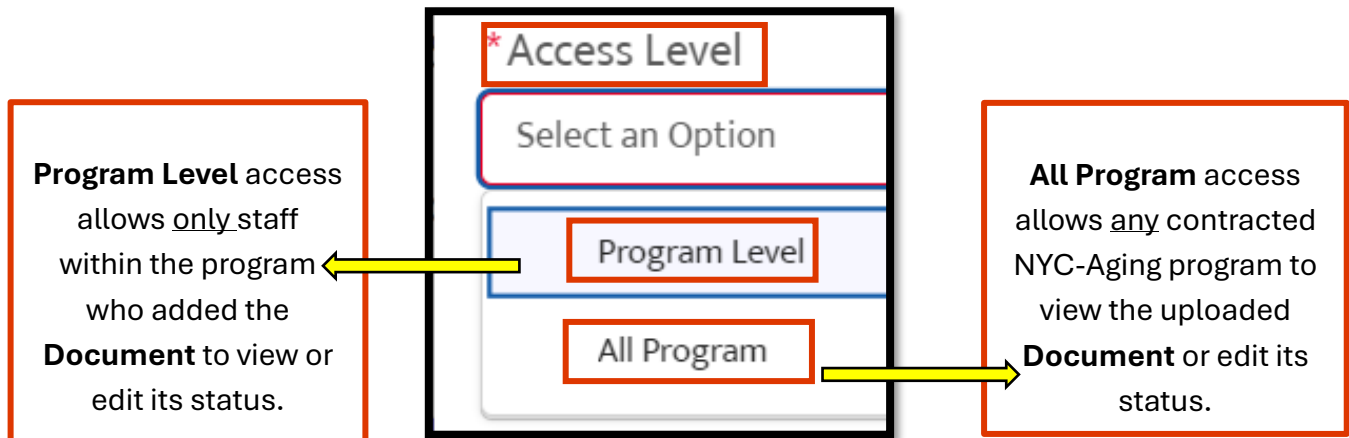
Step 3: Select the **Add Document** button to bring up a pop-up to enter document details.

Step 4: On the **Add Document** pop-up, complete the required fields of **Document Type**, **Access Level** and **Document Title**. The **Status** field will automatically default to the status of **Active**. If needed, provide a **Description** of the documentation.

Access Level

Access to viewing **Documents** that are added to a client's file can either be viewed only by the program that uploaded the documentation or by any program that is contracted with NYC-Aging. Use the **Access Level** dropdown to pick the appropriate level.

The two Access Level options are: Program Level and All Program.



TIP: For sensitive client documentation, add material on the **Enrollment** level with the **Access Level** of **Program Level**. This will ensure that your program will be the only program that can view and edit the status of the documentation uploaded.

Upload Files

Step 5: Finally, select the **Upload Files** button to add the documentation. Select the **Save** button to complete the process.

After selecting **Save**, you will return to the **Documents** List View where general information regarding the recently added documentation is displayed.

The screenshot shows the 'Add Document' form with the following fields and values:

- * Document Type:** Legal Document
- * Access Level:** Program Level
- * Document Title:** POA-test-hope-11-2024
- Status:** Active
- Description:** Copy of POA for Medicaid application.
- Upload Document:** A section containing an 'Upload Files' button (with an upload icon) and the text 'Or drop files'.
- File Name:** POA-test-hope_11-2024.pdf
- Buttons:** Cancel and Save.

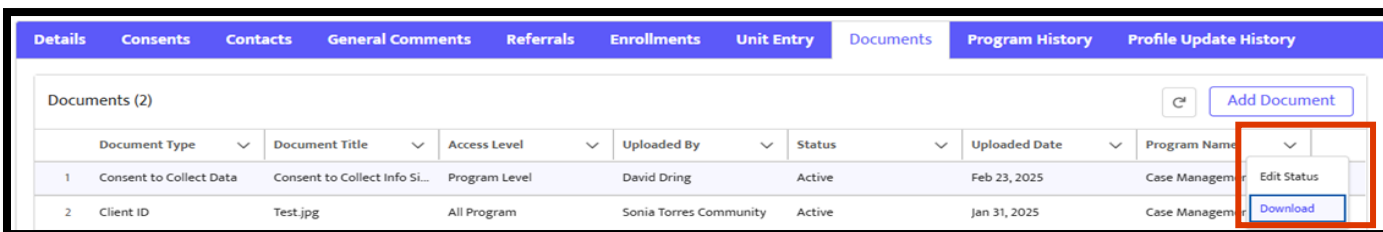
TIP: Keeping various client documentation in one access documents arises. Deciding to upload a client's documentation to the **Documents** feature on either the **Details** level or the **Enrollment** level, not both, may prove useful.

Viewing / Editing Documents

View Documents

While you cannot select and open documentation directly from the **Documents** tab List View, you can download and print a pdf copy of the file by using the List View dropdown. This dropdown feature can be found to the far-right of the List View row. To download the document for viewing or printing:

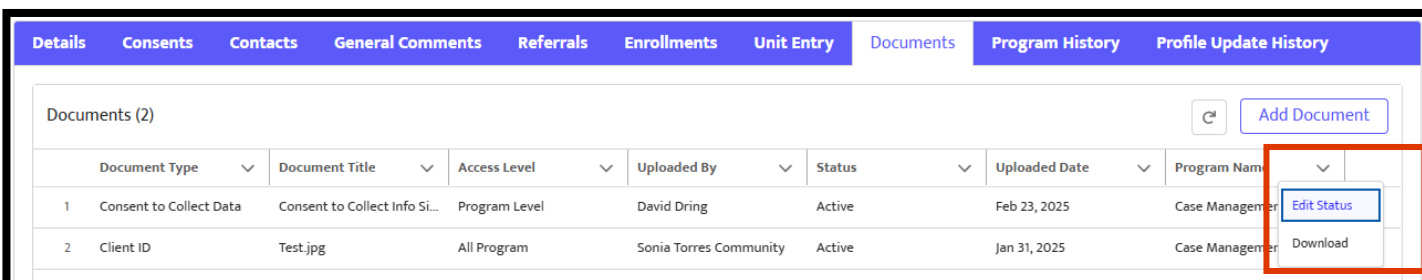
Step 1: Select the dropdown arrow and pick **Download**. Using the browser, the document is placed within your local Downloads folder.



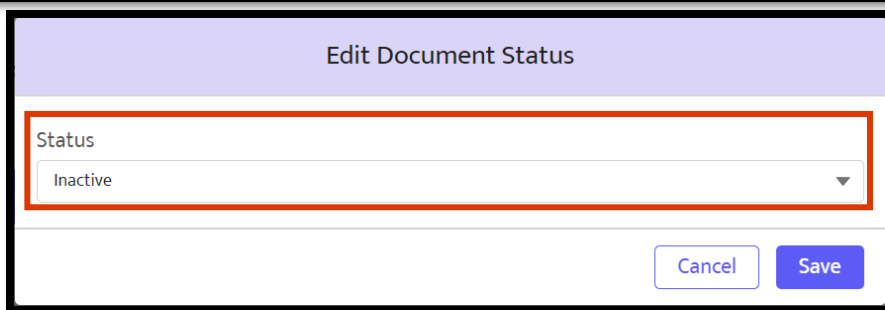
Edit Document Status

The same dropdown arrow feature provides the ability to edit the status of a document.

Step 1: Select the dropdown arrow and pick **Edit Status**. The **Edit Document Status** pop-up will appear. The status of **Active** will be the default in the **Status** dropdown list.



Step 2: If the document is no longer applicable for the client, pick **Inactive** from the dropdown list and select the **Save** button.



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**.

VIVÉ Admin Tools 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, enrolling, disenrolling and the features of Admin Tools.

Admin Tools is a common, core functionality within VIVÉ, which is described within this guide. There is some functionality specific to Home Delivered Meal programs, such as administrating their drivers, is not described here; only within their Program Guide.

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](#). You can also 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 Programs' Standards](#).

In this guide you will learn:

- **Accessing Admin Tools**
- **Viewing Users**
 - Searching for Users
- **Creating a New User**
- **Editing a User**
 - Editing Basic Information
 - Editing User Roles with Program Associations
- **Inactivating a User from a Program Association**

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

Accessing Admin Tools

The core function of Administrative Tools is managing users. This is where users are viewed, created, and edited.

From **Top Menu**, click **Admin Tools**. The **User Management** tab will be displayed by default. This page lists all the users within your program.

The screenshot shows the VIVÉ Admin Tools interface. At the top, there's a navigation bar with links like Client Search, Referral Queue, Program Tools, Admin Tools, and Reports. Below this, a message indicates the user is logged in as David Dring and working in the Older Adult Center - BAY RIDGE - Life Long program. The main section is titled 'User Management' and has two tabs: 'Program Users' and 'All Users'. Under 'All Users', there's a search box (highlighted with an orange border) and a 'New User' button. Below the search box is a table of users with columns for First Name, Last Name, Email, and Mobile Phone. The table lists three users: Adrian Jones, Anissa Cabrera, and Anya Herasme.

Viewing Users

There are two types of users within VIVÉ. The first are Program Users, those users who are associated with your program. The second are all other users. These include every user within VIVÉ. You have access to them should you ever need to associate them with your program.

Searching for Users

There is a search box on **User Management** page. Enter either in part of or a complete user name to retrieve a list matching your search criteria. Clicking on a user's name link displays the user's details, including what programs they are associated with.

The screenshot shows the user details page for Walli Peters. It includes a form with fields for First Name, Last Name, Middle Initial/Name, Date of Birth, Gender, Cell Phone, Fax Number, Email, and User Title. There are also buttons for 'Associate Program', 'Cancel', and 'Save'. Below the form is a table titled 'User Associations' with columns for Program Name, User Role, Status, Created Date, and Deactivation Date. The table shows one association for the NORC - ED ALLIANCE - Co-Op Village program, with a role of Program Admin and a status of Active.

Creating a New User

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

Step 2: From the **User Management** list view, select the **New** button.

Step 3: From the **New User** pop-up, enter the required fields, such as Name, Phone #, Email and User Role.

NOTE: The Email Address must be the same one associated with their NYC.ID.

There are four User Roles:

- **Program Admin:** has the ability to manage users of associated programs.
- **Program Read-Only:** can view but not make any edits to select programs.
- **Program Staff:** the primary users of the system
- **Program Supervisor:** the people responsible for approving and finalizing staff activities. For example, Program Supervisors approve, reject or close a client's enrollment into a program.

Step 3: Once the user's information is saved, the user details page appears to associate the user with their program(s). There is no limit to the number of programs a user can be associated with.

Editing a User

There are two primary edits to a user's details: basic information and user roles with program associations.

Editing Basic Information

Step 1: From the Top Menu, click on Admin Tools.

Step 2: From the User Management list view, click the user’s name link.

Step 3: From the user details page, edit information within any field. Select Save when finished.

Editing User Roles with Program Associations

A user can have different roles with their different program associations. For example, Walli is associated with a NORC as a Program Admin and with the OAC as Program Staff.

Step 1: From the Top Menu, click on Admin Tools.

Step 2: From the User Management list view, click the user’s name link.

Step 3: From the user details page, select the Edit button to manage program association details.

Step 4: Within the User Association pop-up, change either User Role or Status. In this way, you establish the user’s role for that particular program.

User: Walli Peters
Email address will be used as user name and must be registered NYC.ID to be able to login.

*First Name: Walli
*Last Name: Peters
Gender: --None--
Cell Phone: 6461234567
Fax Number:
Username: walli@abc.com

Middle Initial/Name:
Date of Birth:
Home Address:
Work Phone:
*Email: walli@abc.com
User Title: Chief Program Officer

Associate Program Cancel Save

Program Name	User Role	Status	Created Date	Deactivation Date	
NORC - ED ALLIANCE - Co-Op Village	Program Admin	Active	03/20/2025		Edit
Older Adult Center - BAY RIDGE - Life Long	Program Staff	Active	03/20/2025		Edit

User Association

*Program: Older Adult Center - BAY RIDGE - Life Long
*User Role: Program Staff
*Status: Active

Cancel Save

NOTE: You may see a person is associated with other programs, but you can only edit those associations where you are a Program Admin.

Inactivating a User from a Program Association

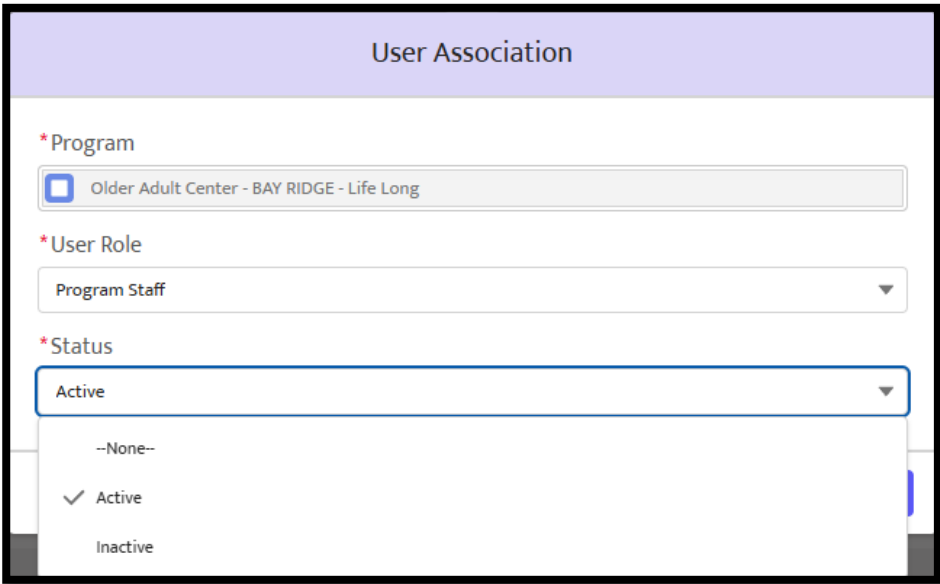
While users are never deleted from the system, they are inactivated from a program. In this way, they can be reactivated with another program later.

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

Step 2: From the **User Management** list view, click the user's name link.

Step 3: From the user details page, **select the Edit** button to manage program association details.

Step 4: Select the Status drop-down to change the user's status. Then **Save**.



The screenshot shows a web form titled "User Association". It contains three main sections, each with a red asterisk indicating a required field:

- * Program:** A dropdown menu with a blue square icon on the left and the text "Older Adult Center - BAY RIDGE - Life Long".
- * User Role:** A dropdown menu with the text "Program Staff" and a downward arrow.
- * Status:** A dropdown menu with "Active" selected. Below the dropdown, a list of options is visible: "--None--", "✓ Active", and "Inactive".

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**.