



VIVÉ REFERENCE GUIDE

CASE MANAGEMENT



Welcome to the Detailed VIVÉ Reference Guide on Case Management

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 Case Management 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.

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VIVÉ Knowledge Base – Case Management Programs

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VIVÉ Case Management Programs 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 using the Case Management module of 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 refer to your program officer or view [NYC Aging's Program's Standards](#).

In this guide you will learn:

- [VIVÉ: Flow Diagrams](#)
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 - Waitlist
 - Unit Entry

In addition to these 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 |

VIVÉ: Flow Diagrams

The following flow diagrams illustrate the navigation processes for key aspects of your work. These diagrams provide a general overview of the steps involved in completing key tasks, while also showcasing the various sections of the VIVÉ database. Detailed instructions on how to enter information are provided in each of the sections.

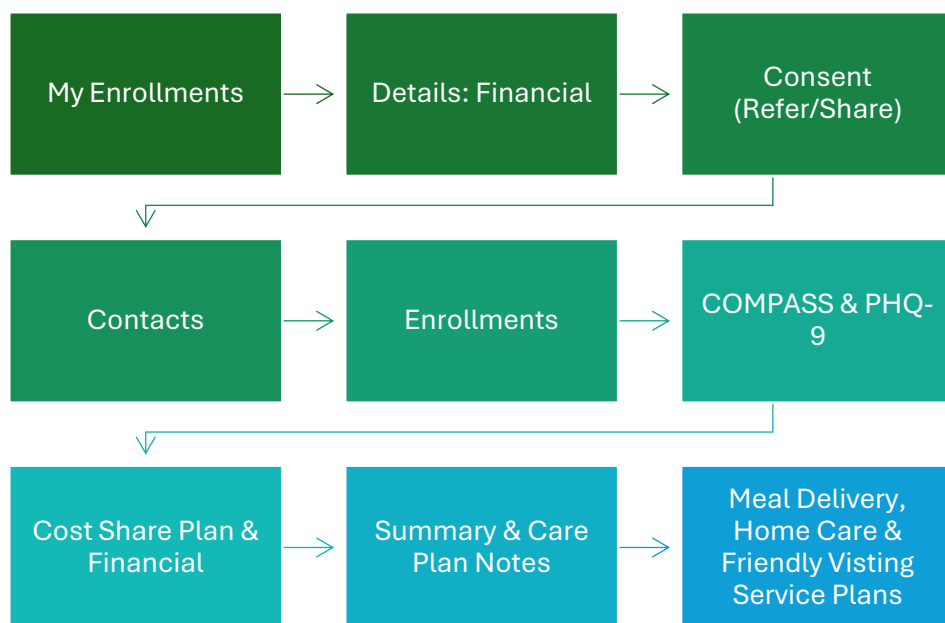
Intake Flow Chart



The diagram above outlines the major steps involved in working with a new client at the time of intake. You can navigate through these steps in this way and once information is entered you can return to previous sections as needed.

Below is a flow diagram for the major steps involved in entering assessment/reassessment information for an assessed client. You can navigate through these steps in this way and once information is entered, you can return to previous sections as needed.

Assessment Flow Chart



Intake Process

Intake Flow Chart



When completing an intake in VIVÉ, the process follows the basic flow that is represented in the **Intake Flow Chart** diagram above.

- Conduct a **Client Search** to see if the older adult is known in the database or needs to be added as a new client.
- Ensure that verbal **Consent to Collect Data** is noted to continue with the collection of client information.
- On the **Client Profile** level, capture information associated with **Basic Demographics, Social Demographics, Emergency Preparedness, Financial**, and **NYSOFA Additional Information**.

NOTE: For clients in need of **Home Care** services, information about their income, assets and expenses **must be** added on the **Financial** form located on the **Details** sub-menu. Information from this form is used to tabulate the client's **Cost Share** on the **Enrollment** level. The **Financial** form and its relation to **Cost Share** is discussed in detail in the **Assessment** section.

- **Contacts** are added as provided by the client on the **Details** level.

NOTE: To help streamline navigation when completing certain sections of the **COMPASS** (e.g., health care status, legal information, IADL/ADLS and caregiver support), add contacts **prior** to accessing the **COMPASS**.

- A new **Enrollment** is then created. The **Enrollment Status** is noted **In Review** until the intake is approved. The status then changes to **Active**.

Focus is now given to these last two components of the Intake Flow Chart – **CMA/HDM Intake/ PEC Meal** and **Review & Worker Assignment**.

There are six forms that are a part of the initial intake for case management services. These forms are divided into two types: Page View or List View.

VIVÉ Knowledge Base – Case Management Programs

- **Page View** forms link directly to the questions. Intake Page View forms are CMA/HDM Intake, APS, and Benefits & Entitlements.
- **List View** forms provide a list of completed forms. The list includes many completed forms, such as someone's severity of depression from the PHQ-9. Intake List View forms are the NSI and PHQ-9.

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

Step 2: From the **Details** Menu, click the **Enrollments** tab, click on an active enrollment link.

Step 3: Click on the **Forms** tab to view the sub-menu of intake forms.

Example Page View form: CMA/HDM Intake. Select **Edit** to begin entering or editing the information.

The screenshot shows the 'Enrollment Details' page with the 'Forms' tab selected. Under the 'Forms' tab, 'CMA/HDM Intake' is selected. The form title 'CMA/HDM Intake' is displayed, and an 'Edit' button is highlighted with a red box. Below the title, the 'Intake Date' is shown as 12/3/2024.

After entering or editing all of the required fields of a Page View form, there are three actions.

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

The screenshot shows three buttons: 'Reset', 'Cancel', and 'Save'. The 'Save' button is highlighted with a red box.

List View forms are the NSI and PHQ-9. While they behave similarly, there is one key difference. For both the NSI and PHQ-9, select **New** to begin entering information or click the form number to edit an

The screenshot shows the 'Enrollment Details' page with the 'Forms' tab selected. Under the 'Forms' tab, 'NSI' is selected. The list title 'NSI (5)' is displayed, and a 'New' button is highlighted with a red box. Below the title, a table lists the forms:

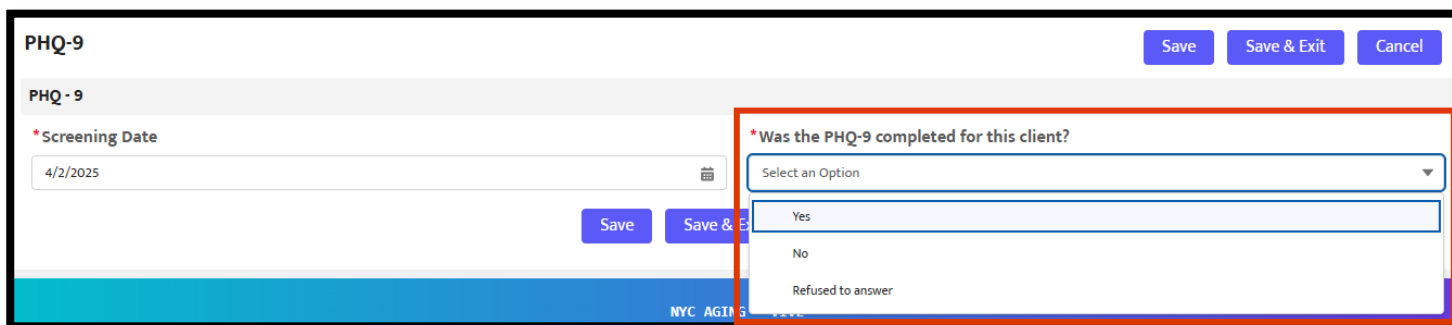
Sr. No.	Date	Author	Total Score	NSI Conclusion	Program	Own/Shared Form
1	02/02/2025	David Dring	14	High	Older Adult Center - BAY RIDGE - Health and W...	Shared Form
2	01/13/2025	David Dring	5	Moderate	Older Adult Center - BAY RIDGE - Health and W...	Shared Form

existing form. Both the NSI and PHQ-9 calculate a score based upon the entered information. They must be saved to calculate the score and then **Save & Exit** will return you to the List View where the score appears.

List View forms have multiple options after you create or edit the page. They are:

- **Reset:** A pop-up box asks you to confirm that you want to clear all the information entered.
- **Cancel:** Does not save any information and returns to the previously 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 previous form.

The PHQ-9 form is unique in that it asks an initial conditional question: **Was the PHQ-9 completed for this client?** A **Yes** answer displays all the required PHQ-9 fields. After all the fields are entered or edited, select **Save** to calculate the score and then **Save & Exit** or **Cancel** to return to the List View.



Other forms that are part of the intake process have unique attributes as well. For example, the Benefits & Entitlements form includes external links to screening services such as AccessNYC and BenefitsCheckUp.

NOTE: The **Intake Date** field on all forms defaults to today's date. Intake dates can be back dated. However, they cannot be dated in the future.

Review & Worker Assignment

The initial status of a client's enrollment is In Review. Once the intake is completed, the case is reviewed by a supervisor and is either approved or rejected. From within any tab of **Enrollment Details** the **Assign Worker**, **Approve** and **Reject** buttons are available in the upper right corner.

To Approve a client enrollment at Intake

Step 1: The Supervisor selects the **Approve** button. The Enrollment Status switches to **Active**. The buttons switch as well. **Closing Enrollment** replaces the **Active** and **Reject** buttons.

The image consists of two overlapping screenshots of the VIVÉ Case Management interface. The top screenshot shows the 'Enrollment Details' tab for a case titled 'Case Management - NSHOPP - CMA'. The 'Contact' is 'test-oliver client' and the 'Assigned To' is blank. In the top right corner, there are three buttons: 'Assign Worker', 'Approve' (highlighted with a red box), and 'Reject'. Below the tabs, the 'Enrollment Information' section shows 'Enrollment Name' as 'Case Management - NSHOPP - CMA' and 'Enrollment Status' as 'Active' (highlighted with a red box). The bottom screenshot shows the same interface after the 'Approve' button was clicked. The 'Approve' button has been replaced by 'Closing Enrollment' (highlighted with a red box). The 'Enrollment Status' remains 'Active' (highlighted with a red box).

To Reject a client enrollment at Intake

Step 1: Select the **Reject** button.

Step 2: Confirm that you are rejecting the client on the **Reject the Enrollment** pop-up by checking the box. Then select **Yes**.

The screenshot shows the 'Enrollment Case Management - NSHOPP - CMA' interface. At the top right, there are buttons for 'Assign Worker', 'Approve', and 'Reject'. The 'Reject' button is highlighted with a red box. Below the main header, there is a navigation bar with tabs: 'Enrollment Details', 'Forms', 'Assessments', 'Waitlist', 'Cost Share Plan', 'Meal Delivery Plan', 'Home Care Service Plan', and 'More'. The 'Enrollment Details' tab is selected. Below the tabs, there is a sub-header with 'CMA/HDM Intake', 'APS', 'NSI', 'PHQ-9', and 'Benefit'. A modal dialog box titled 'Reject the Enrollment' is open. It contains a checkbox with a checkmark, followed by the text 'Are you sure you want to reject this enrollment?'. At the bottom right of the dialog, there are 'Cancel' and 'Yes' buttons, with the 'Yes' button highlighted by a red box.

NOTE: Once the *Reject* button is selected and the client becomes *Inactive*, the only way to “reactivate” the client’s Enrollment, is by creating a new Enrollment.

To Assign Worker

You can assign a worker to distribute the caseload or choose a specific person to help you with the case, such as a supervisor to review the intake.

Step 1: Select the **Assign Worker** button.

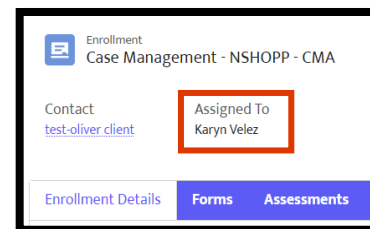
The screenshot shows the 'Enrollment Case Management - NSHOPP - CMA' interface. At the top right, there are buttons for 'Assign Worker' and 'Closing Enrollment'. The 'Assign Worker' button is highlighted with a red box. Below the main header, there is a navigation bar with tabs: 'Enrollment Details', 'Forms', 'Assessments', 'Waitlist', 'Cost Share Plan', 'Meal Delivery Plan', 'Home Care Service Plan', and 'More'. The 'Enrollment Details' tab is selected. Below the tabs, there is a sub-header with 'Enrollment Information', 'Enrollment Name', and 'Case Management - NSHOPP - CMA'. A modal dialog box titled 'Assign Worker' is open. It contains a dropdown menu labeled '* Assigned To' with 'Karyn Velez' selected. At the bottom right of the dialog, there are 'Cancel' and 'Submit' buttons, with the 'Submit' button highlighted by a red box.

Step 2: From **Assigned Worker** pop-up use the dropdown list to pick whom you are assigning the client to. Select the **Submit** button.

Assigned Worker Notifications

There are three ways that workers are informed about their assignment to a client:

- The assigned worker is displayed on the page header.
- The worker receives a notification within their Bell icon on the **Top Menu**.
- The client's name appears within the worker's **My Enrollments** on the Dashboard. You may need to **Refresh** the **Dashboard** page to view new client information.



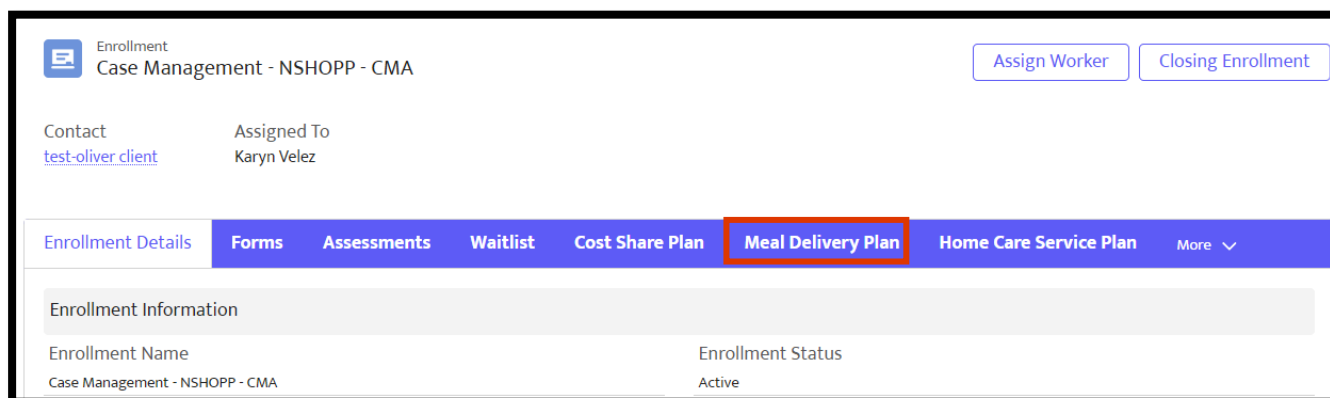
NOTE: If the worker assignment needs to be changed, the **Assign Worker** button continues to be available on the **Enrollment Details Menu**. Complete this same process to re-assign the client's case.

Authorizing a *PEC* Meal

At the time of the **CMA/HDM Intake**, a **Presumptive Eligible Client (PEC)** home delivered meal can be authorized for clients once the intake is completed. A *PEC* Meal can be activated and referred to your HDM provider before the client's in-home assessment is completed.

Initial Activation of the *PEC* Meal

Step 1: From the **Enrollment Details Menu**, click the **Meal Delivery Plan** tab.



Step 2: Select the **New** button to start a new **Meal Delivery Plan**.

Step 3: The Meal Delivery Plan includes fields that are completed by you and others completed by your HDM provider. The fields completed by you are:

- **Authorization Date (required):** While this date is prepopulated to today, it can be changed to either a previous or future date.
- **Cross-Streets & Special Delivery Directions:** Helpful information for the drivers.

These fields are completed **ONLY** by the HDM Provider:

- **Meal Delivery Start Date**
- **Meal Deliver End Date** (optional)
- **Status:** This is the trigger indicating the start of service.

Step 4: Select the **Add Delivery Schedule** button to access the **Service Type** and **Diet Type**. You may need to use the vertical scroll bar on the right side of the window.

After selecting the **Add Delivery Schedule** button, a row appears. The row's column headings include **Service Type**, **Diet Type**, the days of the week and **Funding Source**. **Only Service Type** and **Diet Type** are for you to edit. All other row fields are the responsibility of the **HDM Program**. The **Trash Can** icon can be used to delete its associated row.

Step 5: Select the **Service Type** and **Diet Type** dropdowns to indicate the meal delivery schedule.

Step 6: Re-select the **Add Delivery Schedule** button and add more deliveries, such as 6th (Saturday) or 7th (Sunday) day meals. As the number of rows grow, use the scroll bar to access the **Add Delivery Schedule** button.

The screenshot shows the 'Meal Delivery Plan' form. At the top, there are fields for 'Cross-Streets' and 'Special Delivery Directions'. Below these is a '*Status' dropdown menu set to 'Draft'. The main part of the form is a table with columns for days of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun), 'Funding Source', and a trash can icon. The first three rows of the table are highlighted with a red box. Each row has a '#', 'Service Type', and '*Diet Type' column. The first row is 'Weekday', the second is '6th Meal', and the third is '7th Meal'. All three rows have 'Hot Regular' in the '*Diet Type' column. Below the table, there is a blue 'Add Delivery Schedule' button, also highlighted with a red box. At the bottom right, there are 'Cancel' and 'Save' buttons.

#	Service Type	*Diet Type	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Funding Source	
1	Weekday	Hot Regular								Select an Option	🗑️
2	6th Meal	Hot Regular								Select an Option	🗑️
3	7th Meal	Hot Regular								Select an Option	🗑️

[Add Delivery Schedule](#)

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

Step 7: Confirm that all required fields are completed before selecting **Save**. The meal plan is displayed on the **Meal Delivery Plan** List View in **Draft** status. If changes to the plan are needed, click the **Meal Delivery Plan Name** link to access the plan and make changes.

NOTE: While a Meal Delivery Plan is in Draft status, no new meal plan can be added.

Referral of a *PEC* Meal to the HDM Program

A **PEC Meal Delivery Plan** can be referred to the **HDM Program** directly from the **Meal Delivery Plan** form. The steps for sending this referral type are as follows:

Step 1: From the **Enrollment Details Menu**, click the **Meal Delivery Plan** tab. From its List View, click the desired **Meal Delivery Plan** link.

Step 2: From the **Meal Delivery Plan** page, select the **Create Referral** button.

Step 3: The **Client Referral Form** pop-up appears with pre-populated data from the **Meal Delivery Plan** that cannot be edited. The only editable field is the **Comments** text box where additional information regarding the meal delivery is shared.

The screenshot displays the VIVÉ system interface. At the top, a navigation bar includes tabs for Enrollment Details, Forms, Assessments, Waitlist, Cost Share Plan, Meal Delivery Plan (selected), and Home Care Service Plan. Below the navigation bar, the 'Meal Delivery Plans (1)' section shows a table with one entry: MDP-00192. A 'Create Referral' button is visible in the top right corner of the Meal Delivery Plan form.

The 'Client Referral Form' pop-up is shown in the foreground. It contains the following fields and sections:

- Referral Date:** Dec 31, 2024
- Source Program:** Case Management - NSHOPP - CMA
- Target Program:** Home Delivered Meals - Great Performances Artists as Waitresses INC.
- Comments:** Enter Comments
- *Meal Delivery Plan:** MDP-00192 (Draft)
- *Service Requested:** Bulk Move Citymeals Funded, Bulk Move DFTA Funded, Emergency Meal Citymeals Funded
- Selected Services:** Weekday, 6th Meal, 7th Meal
- Buttons:** Cancel, Save

The background form shows details for Meal Delivery Plan MDP-00192, including Client (test-oliver.client), Assigned To (Karyn Velez), HDM Program (Home Delivered Meals - Great Performances Artists as Waitresses INC.), Authorization Date (Dec 31, 2024), Meal Delivery Start/End Dates, Cross-Streets, Special Delivery Directions, and a table for Service Type, Diet Type, and Meal Frequency.

Step 4: Confirm that all required fields are completed before selecting **Save**. The system returns to the **Meal Delivery Plan** form.

NOTE: To send PEC Meal referrals from the Meal Delivery Plan, a verbal **Consent to Share/Refer** must first be created. This consent type is created by selecting the Consents tab on the "Client Profile" level and completing the form.

Step 5: Obtain consent from the client before sending the referral. Upon selecting **Save**, a new button, **Create Consent to Refer**, appears requiring you to complete the consent if it has not been done. Select the button.

The screenshot shows the 'Client Referral Form' interface. At the bottom, the 'Create Consent to Refer' button is highlighted with a red rectangular box. Other visible fields include 'Referral Date' (Mar 16, 2025), 'Source Program' (Case Management - NSHOPP - CMA), 'Target Program' (Home Delivered Meals - Great Performer), 'Comments' (Enter Comments), 'Meal Delivery Plan' (MDP-00301 (Draft)), 'Available Services' (Bulk Move Citymeals Funded, Bulk Move DFTA Funded, Emergency Meal Citymeals Funded), and 'Selected Services' (Weekday, 6th Meal, 7th Meal). Buttons for 'Cancel' and 'Save' are also present.

Step 6: The **Client Referral Form: New Consent** pop-up appears with pre-populated fields. Remember to select the **Is Verbal Consent?** checkbox and select the **Save** button to complete the process.

Once consent is recognized, the system returns to the **Client Referral Form** pop-up and the **Save** button can be selected.

The screenshot shows the 'Client Referral Form: New Consent' pop-up. The 'Is Verbal Consent?' checkbox is checked and highlighted with a red rectangular box. Other fields include 'Client' (test-oliver client), 'Consent Type' (Consent To Refer), 'Consent Status' (Active), 'Program' (Case Management - NSHOPP - CMA), and 'Referral Program' (Home Delivered Meals - Great Performer). 'Cancel' and 'Save' buttons are at the bottom right.

NOTE: Once the client is assessed, the Consent Refer/Share form must be signed and uploaded into the client's file on VIVÉ.

Best Practice, Confirm Referral is Sent

Use the **Referral Queue** to confirm your referral was sent.

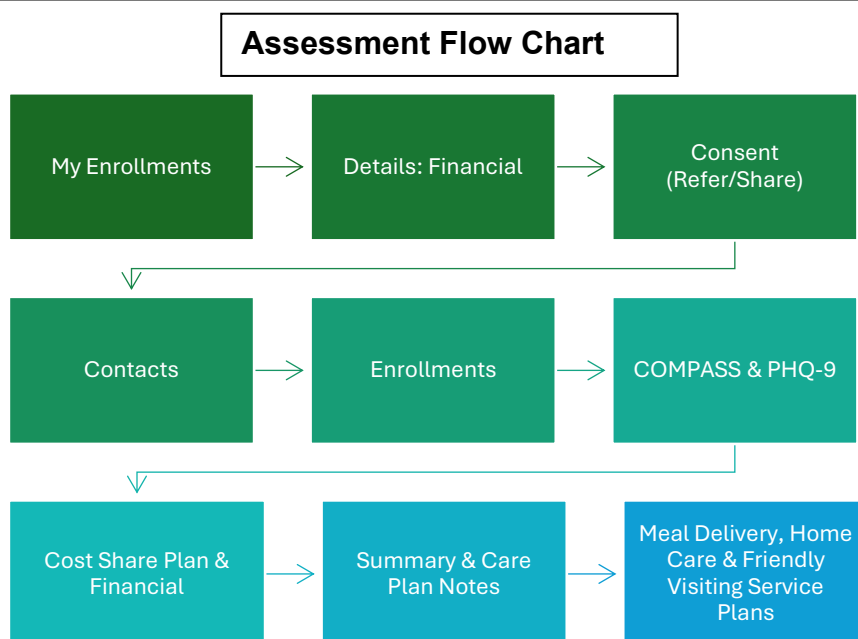
Step 1: From the **Top Menu**, select **Referral Queue**.

The screenshot shows the VIVÉ top navigation bar. The 'Referral Queue' link is highlighted with a red rectangular box. Other visible links include 'Client Search', 'Program Tools', and 'More'. The NYC Aging logo is on the left.

Step 2: From the dropdown, pick **Referrals shared by my Program**. Use either the **Referral Name**, **Referral Date** or **Contact** columns to find the desired referral. Click on the **Referral Name** link to access the referral details.

Referral ...	Referral Sta...	Referral Date	Source Program	Target Program	External Ag...	Contact
1 RF-730	Cancelled	12/31/2024	Case Management - NSHOPP - CMA	Friendly Visiting - NSHOPP - CMA		Buffy Summers
2 RF-758	Referral Sent	12/31/2024	Case Management - NSHOPP - CMA	Home Delivered Meals - Great Performan...		Everything VIVÉ
3 RF-728	Referral Sent	12/31/2024	Case Management - NSHOPP - CMA	Home Delivered Meals - Great Performan...		David Duchovny

Assessment Flow Chart

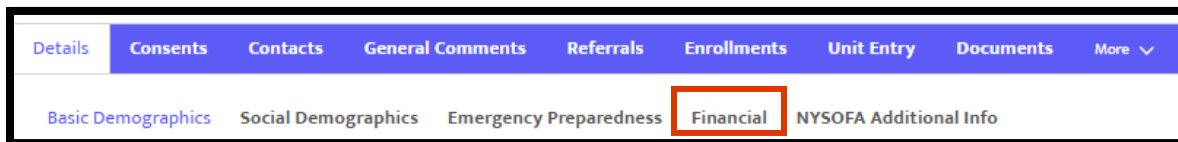


When completing the input of the **COMPASS** assessment data in VIVÉ, the process follows the basic flow that is represented in the **Assessment Flow Chart** diagram above.

- On the **Dashboard**, under **My Enrollments** select the **Contact** link for the client. This will bring you to the **Client Profile** level and its associated menu.

Contact	Enrollment: Enrollment Name	Enrollment Status	Enrollment Date	Service Start Date
Alfred client	Case Management - NSHOPP - CMA	Active	2/6/2025	2/6/2025
Alister Cook	Case Management - NSHOPP - CMA	Active	1/17/2025	1/17/2025

- On the **Client Profile** menu is the **Details** tab and its associated sub-menu. Utilizing the **Financial** sub-tab, add any information regarding the client's finances gathered during the in-home assessment. The **Financial** form and related **Cost Share** are discussed in this section.



- On the **Client Profile** menu is the **Consent** tab. The **Consent to Collect Data** form and any necessary **Consent to Refer/Share** forms are uploaded via this tab.
- On the **Client Profile** menu is the **Contacts** tab. Any **Contacts** shared during the in-home assessment are added via the **Contacts** tab.
- On the **Client Profile** menu is the **Enrollments** tab. On the **Enrollments** List View, click the **Enrollment Name** link to open the **Enrollment Details Menu** where the **Assessments** tab is found.

Focus is now on the last four components of the **Assessment Flow Chart – COMPASS & PHQ-9, Cost Share Plan & Financial, Summary & Care Plan Notes** and **Meal Delivery, Home Care & Friendly Visiting Service Plans**.

COMPASS & PHQ-9

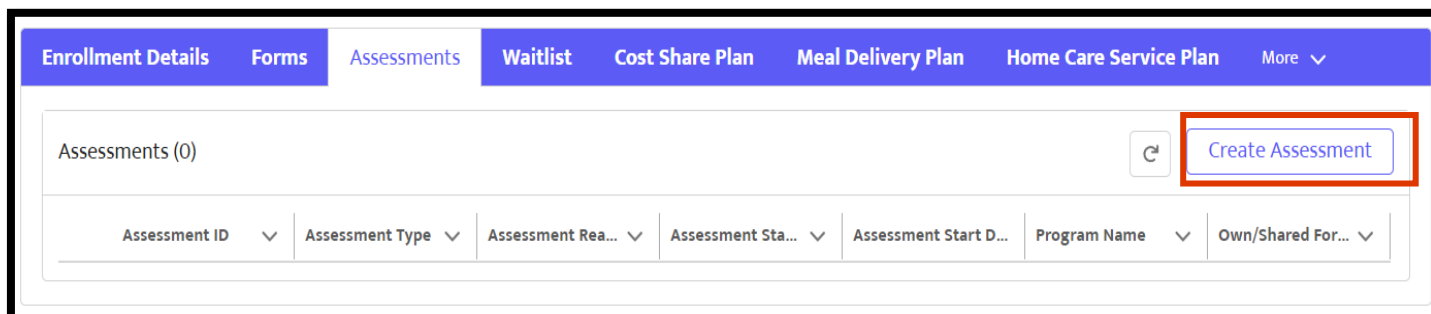
In this section, we discuss the various ways the **COMPASS** form is accessed and provide navigational instructions on how to input data into the form. In addition, we review how to navigate and input data into the **PHQ-9** form.

Accessing the COMPASS form

You can access the **COMPASS** form in one of three ways: 1) by creating a new **Assessment**, 2) by opening an existing **Assessment** that has a status of **Pending** or 3) by **Cloning** an **Assessment** with a status of **Completed**. The steps for each of these options are as follows:

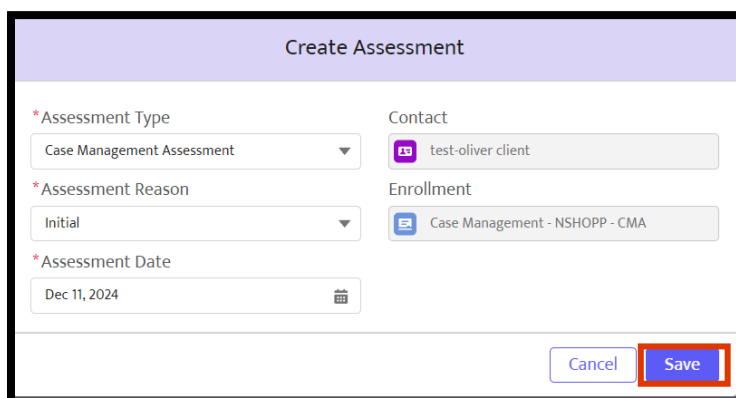
Creating a New Assessment

Step 1: From the **Enrollment Details Menu**, click the **Assessments** tab. Select the **Create Assessment** button to activate a new assessment.



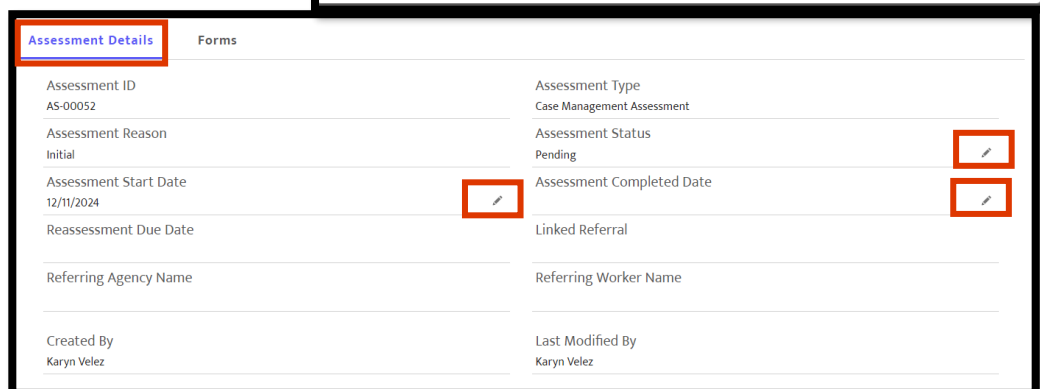
The screenshot shows the 'Assessments' tab selected in the top navigation bar. Below the tab, there is a header 'Assessments (0)' and a 'Create Assessment' button highlighted with a red box. Below this is a table with columns: Assessment ID, Assessment Type, Assessment Reason, Assessment Status, Assessment Start Date, Program Name, and Own/Shared For.

Step 2: From the **Create Assessment** pop-up, complete the **Assessment Type**, **Assessment Reason** and **Assessment Date**. The **Assessment Date** can be a previous, but not a future, date. **Contact** and **Enrollment** is not editable. Confirm that all required fields are completed before selecting **Save**.



The screenshot shows the 'Create Assessment' pop-up form. It contains fields for Assessment Type (Case Management Assessment), Assessment Reason (Initial), and Assessment Date (Dec 11, 2024). There are also fields for Contact (test-oliver client) and Enrollment (Case Management - NSHOPP - CMA). The 'Save' button is highlighted with a red box.

The **Assessment Details** form displays and provides an overview of key information associated with the assessment. Select any pencil icon to make edits.



The screenshot shows the 'Assessment Details' form. The 'Assessment Details' tab is highlighted with a red box. The form displays key information about the assessment, including Assessment ID (AS-00052), Assessment Reason (Initial), Assessment Start Date (12/11/2024), Reassessment Due Date, Referring Agency Name, Created By (Karyn Velez), Assessment Type (Case Management Assessment), Assessment Status (Pending), Assessment Completed Date, Linked Referral, and Referring Worker Name. Pencil icons are visible next to the Assessment Status and Assessment Completed Date fields, indicating they can be edited.

Step 3: Select the **Forms** tab to open the **COMPASS**. The sections on the COMPASS form are divided into sub-tabs. Information for a particular section is added or edited by first selecting its sub-tab. For COMPASS sections not visible among the sub-tabs, click on **More** to access the dropdown of all COMPASS Forms.

NOTE: If there is an Assessment with the status of Pending, you cannot create another. You must change the status of the pending Assessment to **Completed** before creating a new one.

The screenshot shows the COMPASS form interface. The 'Forms' tab is selected and highlighted with a red box. Below it, the 'Client Information' section is visible. To the right, a 'More' dropdown menu is open, showing a list of assessment forms: Nutrition, NSI, CAGE, Psycho-Social Sta..., Loneliness Scale, Medication List, Risk Factors for F..., Assistive Devices, IADLS, ADLS, Benefits and Enti..., and Current Services. The 'More' dropdown is also highlighted with a red box.

Utilizing a Pending Assessment

Step 1: From the **Enrollment Details Menu**, click the **Assessments** tab. The List View displays three assessment types: pending, completed and inactive. Only the pending one is editable. Click the **Assessment ID** link to view its details.

The screenshot shows the 'Assessments' tab in the system. It displays a table with two assessments. The first assessment, with ID AS-22730, is in 'Pending' status and is highlighted with a red box. The second assessment, with ID AS-22729, is in 'Completed' status.

	Assessment ID	Assessment Type	Assessment Reason	Assessment Status	Assessment Start Date	Program Name	Own/Shared Form
1	AS-22730	Case Management Asses...	Follow up	Pending	04/03/2025	Case Management - NSH...	Own Form
2	AS-22729	Case Management Asses...	Initial	Completed	02/25/2025	Case Management - NSH...	Own Form

Step 2: From the **Assessment Details**, click on the **Forms** tab.

Step 3: Click one of the Forms from the sub-tabs. For COMPASS sections not visible among the sub-tabs, click on **More** to access the dropdown of all COMPASS Forms.

Cloning an Assessment

At the time of reassessment, to save time with completing the COMPASS Reassessment, there is the option to clone or copy the previous assessment.

Step 1: From the **Enrollment Details Menu**, click the **Assessments** tab. On the List View, look for the most recent **Assessment** with the **Status** of **Completed**.

Step 2: Click on the **Assessment ID** link associated with the completed **Assessment**.

Assessment ID	Assessment Type	Assessment Rea...	Assessment Status	Assessment Start D...	Program Name	Own/Shared For...
AS-00027	Case Management As...	Initial	Completed	12/04/2024	Case Management - ...	Own Form

Step 3: On **Assessment Details** select the **Clone Assessment** button.

Assessment AS-00027

Clone Assessment

Linked Enrollment: Case Management - NSHOPP...

Contact: test-maxine client

Assigned To: Karyn Velez

Assessment Details | Forms

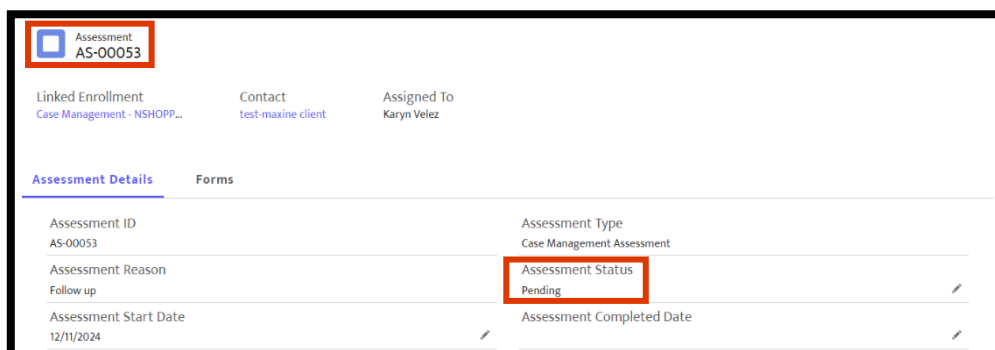
Clone Assessment

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

Step 4: The **Clone Assessment** pop-up confirms the cloning process. If you agree, select **Yes** and you are returned to a new **Assessment Details** page with a new ID with the status **Pending**.

Step 5: Click on the Forms tab. Click on one of the sub-tabs. Click **More** for a dropdown menu of forms not visible.



Assessment AS-00053

Linked Enrollment: Case Management - NSHOPP...
Contact: test-maxine client
Assigned To: Karyn Velez

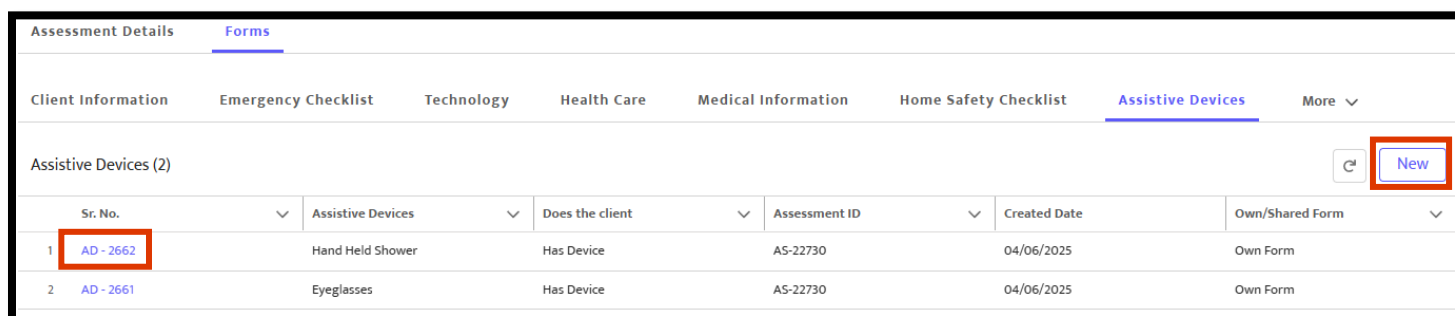
Assessment Details | Forms

Assessment ID	AS-00053	Assessment Type	Case Management Assessment
Assessment Reason	Follow up	Assessment Status	Pending
Assessment Start Date	12/11/2024	Assessment Completed Date	

Inputting Data in the COMPASS forms

While the process of using the forms is similar, there are different styles. The first is a List View, such as Assistive Devices. List View forms display all forms saved. When editing a List View form, click on the form ID number link to access the details. The second is a single Page View form, such as Client Information. Page View is a single form that when edited overwrites the previous entry.

Example List View: Assistive Devices



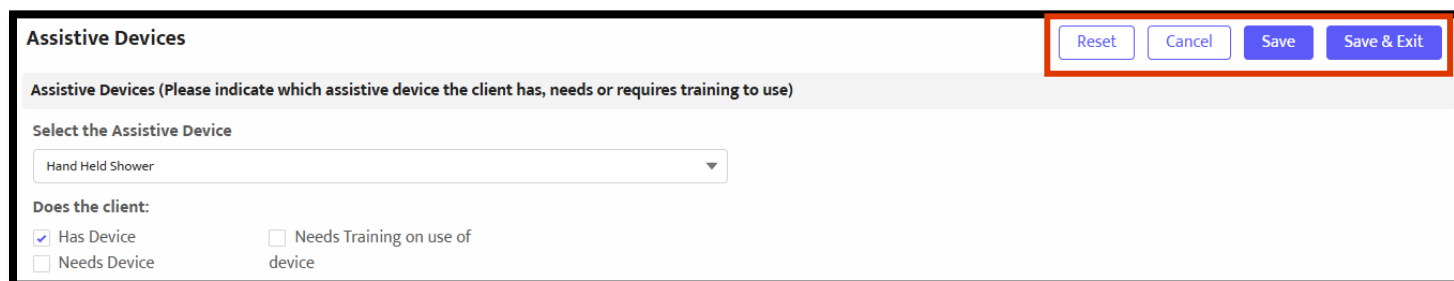
Assessment Details | Forms

Client Information | Emergency Checklist | Technology | Health Care | Medical Information | Home Safety Checklist | Assistive Devices | More

Assistive Devices (2)

Sr. No.	Assistive Devices	Does the client	Assessment ID	Created Date	Own/Shared Form	
1	AD - 2662	Hand Held Shower	Has Device	AS-22730	04/06/2025	Own Form
2	AD - 2661	Eyeglasses	Has Device	AS-22730	04/06/2025	Own Form

Select **New** to create an entry or click on the identification number link to edit an existing entry.



Assistive Devices

Assistive Devices (Please indicate which assistive device the client has, needs or requires training to use)

Select the Assistive Device

Hand Held Shower

Does the client:

☒ Has Device ☐ Needs Training on use of device
☐ Needs Device

Reset Cancel Save Save & Exit

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

- **Reset:** A pop-up box asks 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 return to the List View.

Example of Page View: Client Information

Some fields are grey because they are pre-populated from the **Client Profile**. Select the **Edit** button to make changes.

The screenshot shows a web interface for 'Assessment Details' with a 'Forms' tab. Under the 'Forms' tab, there are several sub-tabs: 'Client Information', 'Emergency Checklist', 'Technology', 'Health Care', 'Medical Information', 'Legal Information', and 'More'. The 'Client Information' sub-tab is selected and highlighted with a red box. Below the sub-tabs, the 'Client Information' form is displayed. It has a section for 'Person's Name' with four input fields: 'Last Name' (pre-filled with 'client'), 'First Name' (pre-filled with 'test-maxine'), 'Middle Name', and 'Preferred Name'. The 'Edit' button is located in the top right corner of the form and is highlighted with a red box. A pop-up box at the bottom right of the form contains three buttons: 'Reset', 'Cancel', and 'Save'.

After editing a Page View form, there are three actions: **Reset**, **Cancel** and **Save**. These actions have the same properties described under List View.

TIP: In most cases, use of the Reset button occurs when updating previously recorded data in a Cloned Assessment.

Here is a list of the case management forms that are either Page View or List View. The chart below highlights which functionality, **Edit** or **New**, is used to input data into the **COMPASS**.

Page View: Edit Button	List View: New Button
Client Information	Medical Information
Emergency Checklist	CAGE
Technology	Loneliness Scale
Health Care	Medications List
Legal Information	Assistive Devices
Nutrition	
NSI	
Psycho-Social Status	
Risk Factors for Falls	
IADLS	
ADLS	
Benefits and Entitlements	
Current Services	
Caregiver Support Status	

NOTE: In VIVÉ, the **Financial** tab takes the place of the **Monthly Income** section found in the hard copy of the **COMPASS**. As a reminder, the **Financial** section is a sub-tab of the **Details** tab.

Assessing the PHQ-9 form

The **PHQ-9** form is found on the **Enrollment Details** Menu. It is on the sub-menu of the **Forms** tab.

Step 1: Click the **PHQ-9** sub-tab. The List View appears providing a general overview of the information associated with each listed record. Select **New** to create an entry.

The screenshot displays the VIVÉ system's 'Enrollment Details' menu. The 'Forms' tab is selected, showing a list of sub-tabs: CMA/HDM Intake, APS, NSI, PHQ-9, Benefits and Entitlements, and HC Consolidated Task List. The 'PHQ-9' sub-tab is highlighted with a red box. Below the sub-tabs, the text 'PHQ-9s (0)' is shown next to a refresh icon. A 'New' button is also highlighted with a red box. At the bottom, a table header is visible with columns: Sr. No., Screening Date, Is PHQ-9 completed?, Total Score, Program Name, and Own/Shared Form.

The **PHQ-9** is a conditional form. You must answer **Yes** to the question **Was the PHQ-9 completed for this client?** for additional questions to display.

The screenshot shows the top portion of the PHQ-9 form. The 'Screening Date' is set to 2/2/2025. A dropdown menu is open for the question '* Was the PHQ-9 completed for this client?'. The menu options are 'Yes', 'No', and 'Refused to answer'. The 'Save' and 'Save & Exit' buttons are visible below the dropdown.

NOTE: The **Screening Date** defaults to today. It can be back-dated but never dated in the future.

The left screenshot shows the full PHQ-9 form. The 'Screening Date' is 3/17/2023. The 'Was the PHQ-9 completed for this client?' question is answered 'Yes'. The form contains 9 questions about various symptoms. The 'Score' section shows a 'PHQ Total Score' of 3 and a 'Depression Severity' of 'Mild Depression'. The 'PHQ Comment' field is empty. The 'Save', 'Save & Exit', and 'Cancel' buttons are at the bottom.

The right screenshot shows the same form, but with the 'Cancel' button highlighted in a red box. The 'PHQ Total Score' is 3 and the 'Depression Severity' is 'Mild Depression'. The 'PHQ Comment' field is empty. The 'Edit' and 'Cancel' buttons are at the bottom.

After answering all the questions, select **Save** and the score is calculated. Then select **Cancel** to return to the List View.

If **No** is selected, indicate why the form could not be completed. Use the dropdown arrow to pick a reason. The selection **Refused to answer**, does not open additional questions.

Cost Share Plan & Financial

The **Cost Share Plan** is a tab on the **Enrollment Details Menu**.

The screenshot shows the 'Cost Share Plan' tab selected in the 'Enrollment Details' menu. Below the menu, there is a section titled 'Cost Shares (0)' with a 'New' button. Below this is a table with columns: Name, Who is providing financial ..., Cost Share Date, Status, and Created Date.

In the **Cost Share Plan** form are three sub-tabs – **EISEP Cost Share**, **Community Medicaid Prescreen** and **Client Agreement Checklist**. Each of these forms must be completed to generate a **Cost Share Plan** used in the creation of a **Home Care Service Plan** referral.

The screenshot shows three sub-tabs: 'EISEP Cost Share', 'Community Medicaid Prescreen', and 'Client Agreement Checklist'. The 'Community Medicaid Prescreen' tab is currently selected.

Cost Share Prerequisite: Financials

The **Financial** form, from the **Details** tab's sub-menu, ***must be completed*** before the **Cost Share Plan** is developed. Information from the Financial section is calculated to determine the cost share. Any changes in financial information must be made within the Financial section.

If the client agrees to provide financial information, select the **Edit** button to answer **Client agrees to provide financial information** and pick **Yes**. Additional questions are revealed. Enter the household size using the dropdown in that field. Select the **Save** button.

The screenshot shows the 'Financial' form in the 'Details' tab. The 'Financial' sub-tab is selected. The form includes fields for Date (Oct 21, 2024), Household Size (dropdown with value 1), and a section for 'Client agrees to provide financial info?' with a dropdown set to 'Yes'. Below this are calculated fields: Total of Household Amount (Yearly) \$10,200.00 and Total of Expenses (Yearly) \$3,600.00.

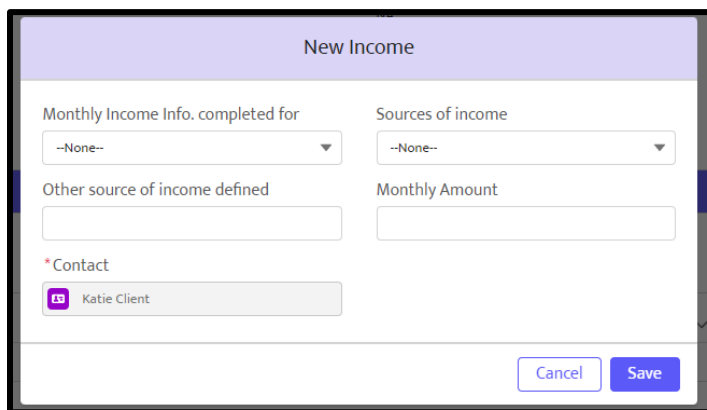
At the bottom of the page, there are three tabs: **Incomes**, **Assets**, and **Expenses**.

The screenshot shows the 'Incomes', 'Assets', and 'Expenses' tabs. The 'Incomes' tab is selected, showing a table with 3 income entries. A 'New' button is visible in the top right corner.

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 appears for you to enter the details of each source of income. Select **Save** and a new row of income appears in the list.



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

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

If you need to add another source of income, click the **Income** tab and complete the **New Income** pop-up.

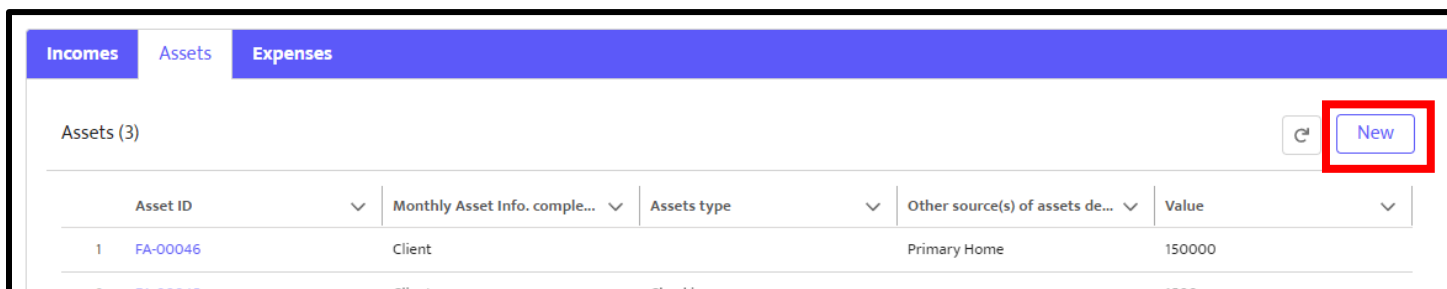
At the top of the page, there is a summary of the household size and its total annual income, total assets and total expenses. If you want to see the Poverty Levels chart, click the hyperlink underneath the **Poverty Level PDF** label.

To edit any of these details, click the **Income** tab then click 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.

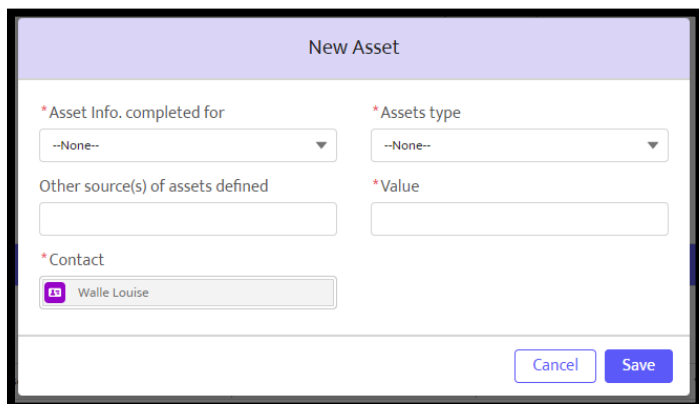
NOTE: The Low Income Minority field pre-populates based on what is entered in the Social Demographics screen.

To Enter Assets

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



Asset ID	Monthly Asset Info. comple...	Assets type	Other source(s) of assets de...	Value
1 FA-00046	Client	Primary Home		150000



The **New Asset** pop-up form is used to add a new asset. It includes the following fields:

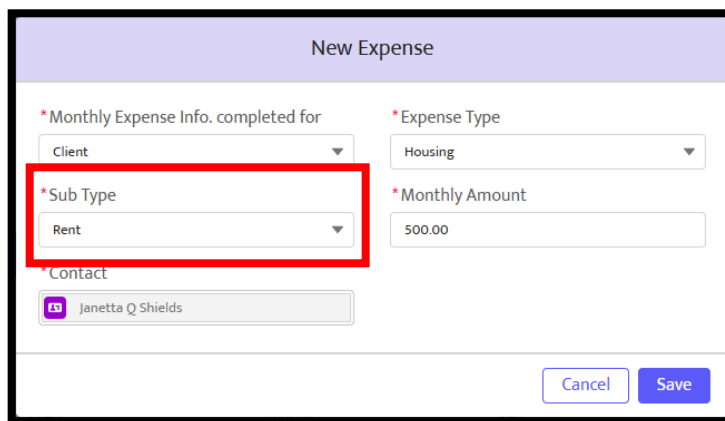
- *Asset Info. completed for:** A dropdown menu with "--None--" selected.
- *Assets type:** A dropdown menu with "--None--" selected.
- Other source(s) of assets defined:** A text input field.
- *Value:** A text input field.
- *Contact:** A dropdown menu showing "Walle Louise".
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

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

The **Asset Total** is 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.

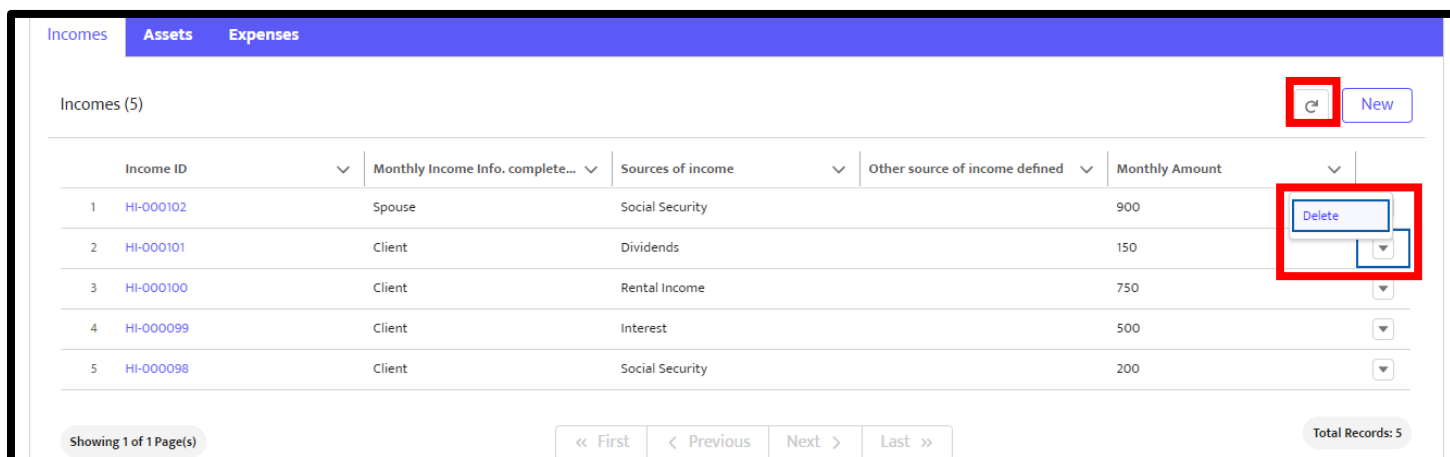


The **New Expense** pop-up form is used to add a new expense. It includes the following fields:

- *Monthly Expense Info. completed for:** A dropdown menu with "Client" selected.
- *Expense Type:** A dropdown menu with "Housing" selected.
- *Sub Type:** A dropdown menu with "Rent" selected (highlighted with a red box).
- *Monthly Amount:** A text input field with "500.00" entered.
- *Contact:** A dropdown menu showing "Janetta Q Shields".
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

To Delete Financial Information

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



The table displays financial information for a client. It has tabs for "Incomes", "Assets", and "Expenses". The "Incomes" tab is selected, showing a list of income records. A "Refresh" button (circular arrow icon) and a "New" button are at the top right. The table has columns for "Income ID", "Monthly Income Info. complete...", "Sources of income", "Other source of income defined", and "Monthly Amount". The first row is highlighted, and a "Delete" button is visible in the right-hand side of the table.

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

Showing 1 of 1 Page(s) « First < Previous Next > Last » Total Records: 5

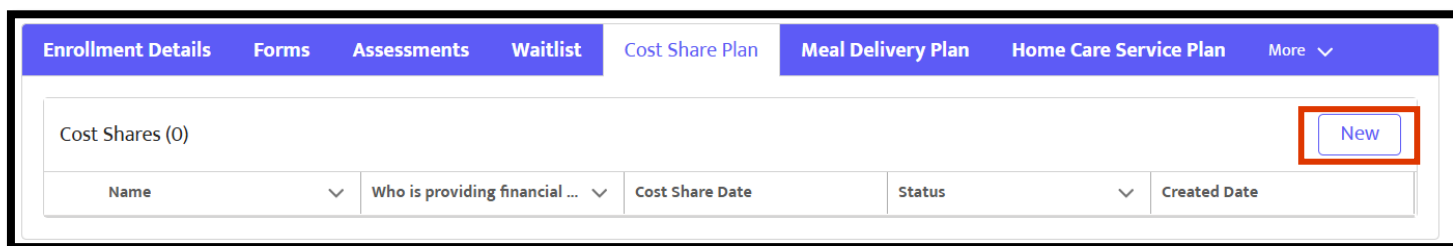
NOTE: Input each specific **Incomes**, **Assets** or **Expenses** source one at a time using the **New** button. In addition, you must input each household member's associated **Incomes**, **Assets** or **Expenses** separately.

Cost Share Plan

Creating a new Cost Share Plan

Step 1: Financial Information entered via **Details** section.

Step 2: Select the **New** button on the **Cost Shares** List View. Certain data from the **Financial** form is pre-populated.

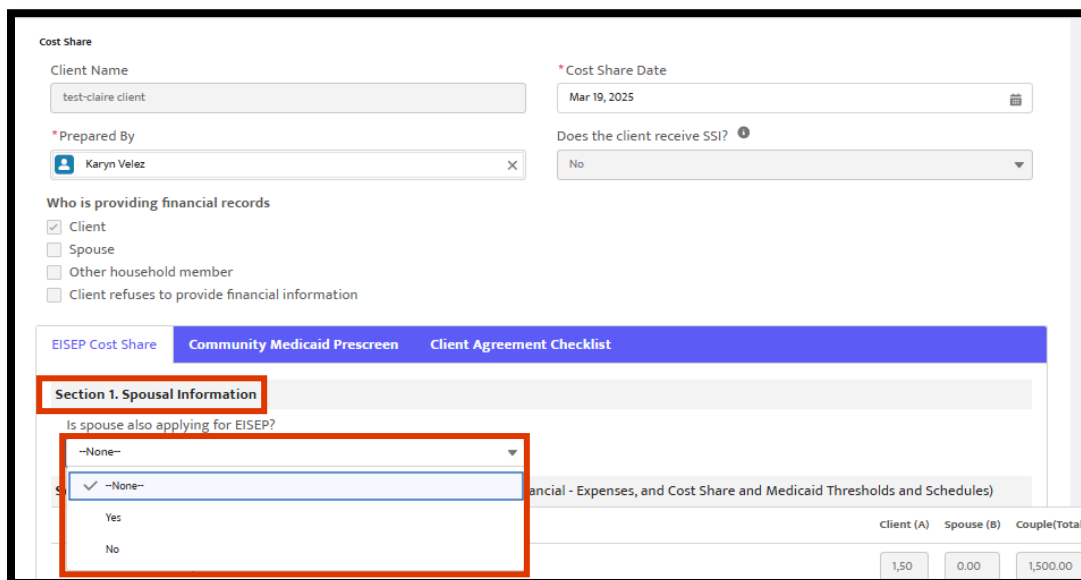


Step 3: Check who is providing this financial information and begin the first of three sub-sections.

EISEP Cost Share

The **EISEP Cost Share** form is divided into six sections – **Spousal Information**, **Monthly Income**, **Housing**, **Housing Adjustment**, **Cost Share** and **Monthly Contribution**.

Section 1. Spousal Information is an editable field, **Is spouse also applying for EISEP?**, is a dropdown menu with three responses – **None**, **Yes** and **No** – with the default being **None**.



If the cost for EISEP services calculated is for an individual without a spouse, the field choice does not need to be changed.

If the cost for EISEP services calculated is for a couple who are both applying for services, select the field choice **Yes**. This prompts a new field, **Name of Spouse**, to display. Then pick the spouse from the dropdown.

Cost Share

Client Name: amber client

* Cost Share Date: Mar 19, 2025

* Prepared By: Karyn Velez

Does the client receive SSI? No

Who is providing financial records:

- ☒ Client
- ☒ Spouse
- ☐ Other household member
- ☐ Client refuses to provide financial information

Section 1. Spousal Information

Is spouse also applying for EISEP? Yes

Name of Spouse: renny client

Other person(s) providing financial info:

If the cost for EISEP services calculated is for an individual whose spouse is not applying for services, select the choice **No**. This prompts a new field, **Non-applicant spouse income unavailable**, to display. Fill in the applicable amount of income that the non-applicant spouse is not able to share for their mutual benefit or the benefit of the client.

Section 2. Monthly Income has no editable fields. Fields are pre-populated with data from the **Incomes** and **Expenses** sub-tabs on the **Financial** form as well as other values associated with calculating an applicant(s) cost share. This is why the **Financial** form must be completed ahead of time.

Section 2. Monthly Income Amounts auto-fill from Financials - Income, Financial - Expenses, and Cost Share and Medicaid Thresholds and Schedules

Monthly Income Source	Client (A)	Spouse (B)	Couple(Total) (C)
2A. Total Social Security:	3,00	0.00	3,000.00
2A1. Medicare Part A Premium: ((Columns A & B auto-fill; Column C = A + B)	0.00	0.00	0.00
2A2. Medicare Part B Premium: ((Columns A & B auto-fill; Column C = A + B)	170.00	0.00	170.00
2A3. Net Social Security: (Row 2A - Row 2A1 - Row 2A2); Note Part D Premium is not subtracted	2,83	0.00	2,830.00
2B. Pension/Retirement: (Columns A & B auto-fill; Column C = A + B)	0.00	0.00	0.00
2C. Interest: (Columns A & B auto-fill; Column C = A + B)	0.00	0.00	0.00
2D. Dividends: (Columns A & B auto-fill; Column C = A + B)	0.00	0.00	0.00
2E. Other income: (Columns A & B auto-fill; Column C = Sum of Rental Income, Salary/Wages, Self-employment, Other Income from Financials - Income form)	0.00	0.00	0.00
2F. Total Monthly Income: (Sum of Row 2A3 thru Row 2E)	2,83	0.00	2,830.00
2G. Non-applicant spouse's income unavailable for mutual needs: (Auto-fill)		0.00	
2H. Total Monthly Income for Cost Share: (Row 2F - Row 2G)	2,83		2,830.00
2I. Cost Share Monthly Income Threshold: (Auto-fill). If Row 2H is less than Row 2I, the Fee Rate is 0%	1,88		2,555.00

Section 3.

Housing has two editable fields, the remaining are pre-populated with data from the **Expenses** sub-tab on **Financial**. Add the associated value for each field as needed.

Section 3. Housing (Auto-fill amounts are from Financial - Expenses)

Monthly Housing Expenses	Total Amount (\$)
3A. Rent: (Auto-fill)	1,500.00
3B. Mortgage: (Auto-fill)	0.00
3C. Maintenance/Common Charge: (Auto-fill)	0.00
3D. Electricity: (Auto-fill)	100.00
3E. Gas: (Auto-fill)	50.00
3F. Oil: (Auto-fill)	0.00
3G. Water/Sewage: (Auto-fill)	0.00
3H. Telephone: Basic phone service only. No internet or data plans. Must choose cell or landline, not both. If no phone, enter 50	60.00
3I. Property Taxes: In NYC school taxes are part of property tax	0.00
3J. Other: Keeps home physically habitable such as snow/garbage removal, yard cleaning, etc. If no other expenses, enter 50	10.00
3K. Monthly Housing Expense (Average Total): (Sum of Rows 3A thru 3J)	1,720.00

Section 4.

Housing

Adjustment has no editable fields.

Fields are pre-populated with values associated with calculating an applicant(s) cost share.

Section 4. Housing Adjustment (Auto-fill amounts are from Cost Share and Medicaid Thresholds and Schedules)

Housing Adjustment	Client (A)
4A. Housing Adjustment Threshold: (Auto-fill)	753.
4B. Excess Housing Expenses: (Row 3K - Row 4A). If the Housing Adj. Threshold (Row 4A) is greater than the Monthly Housing Exp. (Row 3K), client is not eligible for a housing adj.	967.
4C. Net Monthly Income: (Row 2H) (Auto-fill)	2,83
4D. Housing Adjusted Amount: (Either Row 4A or 4B, whichever is less)	753.
4E. Net Monthly Income Minus Excess Housing Expenses (Row 4C - Row 4D)	2,07
4F. Monthly Income Threshold: (Auto-fill)	1,88
4G. Adjusted Monthly Income (Maximum Monthly Fee): (Row 4E - Row 4F)	194.

Section 5. Cost Share has two required fields, **Service Type** and **Authorized Weekly Units**. The

remaining fields are pre-populated with values associated with calculating cost share. Use the dropdown arrows to pick the choice that corresponds with the client's care plan.

Section 5. Cost Share

5A. Authorized Monthly Services (Auto-fill amounts are from client's care plan/service plan)

Service Type *	Auth. Weekly Units *	Estimated Monthly Units	Unit Cost	Monthly Cost
Homemaker/Personal Care ▼	8 ▼	34.40	28.50	980.40

Monthly Cost Calculation

	Total Amount (\$)
5B. Total Monthly Cost for Authorized Services: (Row 5A, Column E) (Auto-fill)	980.40
5C. Fee Rate %	15.00%
5D. Monthly Fee: (Row 5B x Row 5C)	147.06
5E. Maximum Monthly Fee: (Row 5B)	980.40
5F. Monthly Cost Share: (Either Row 5D or 5E, whichever is less, also if less amount is negative, then it will be converted to "Zero")	147.06

Section 6. Monthly Contribution has no required fields. The field is pre-populated with a value associated with cost share contribution amounts.

Section 6. Monthly Contribution A contribution is requested ONLY from clients who do not pay a cost share.

Requested Monthly Contribution (Per Hr. Home Care Rate x Estimated Monthly Units): 49.02

If the client is in receipt of Supplemental Security Income (SSI), they are not eligible for EISEP services because

they are recipients of Medicaid. The **EISEP Cost Share** form therefore, will note **No items to display**.

Cost Share

Client Name: Alfred client

*Cost Share Date: Mar 19, 2025

*Prepared By: Karyn Velez

Does the client receive SSI? Yes

Who is providing financial records

- ☒ Client
- ☐ Spouse
- ☐ Other household member
- ☐ Client refuses to provide financial information

EISEP Cost Share Community Medicaid Prescreen Client Agreement Checklist

No items to display

Cancel Save Mark Complete

Community Medicaid Prescreen

Click the **Community Medicaid Prescreen** sub-tab to display the form with two editable fields and three sections – **Resources**, **Income** and **Monthly Medical Expenses**.

When completing the **Any apply client's household** field select the desired choice from the list in the **Available** field and use the right-pointing arrow to move the choice to the **Chosen** field. To move the item back, choose the list choice again and select the left-pointing arrow. **NOTE:** *Although these fields are not required, it is strongly recommended that you complete them to attain accurate prescreening for Medicaid.*

Cost Share

Client Name: gena client

*Cost Share Date: Mar 19, 2025

*Prepared By: Karyn Velez

Does the client receive SSI? No

Who is providing financial records

- ☒ Client
- ☒ Spouse
- ☒ Other household member
- ☐ Client refuses to provide financial information

EISEP Cost Share Community Medicaid Prescreen Client Agreement Checklist

Any apply client's household?

Available

- Household includes one or more persons in addition to the client and spouse
- Client is under age 65 and is not disabled

Chosen

Who lives in this household?

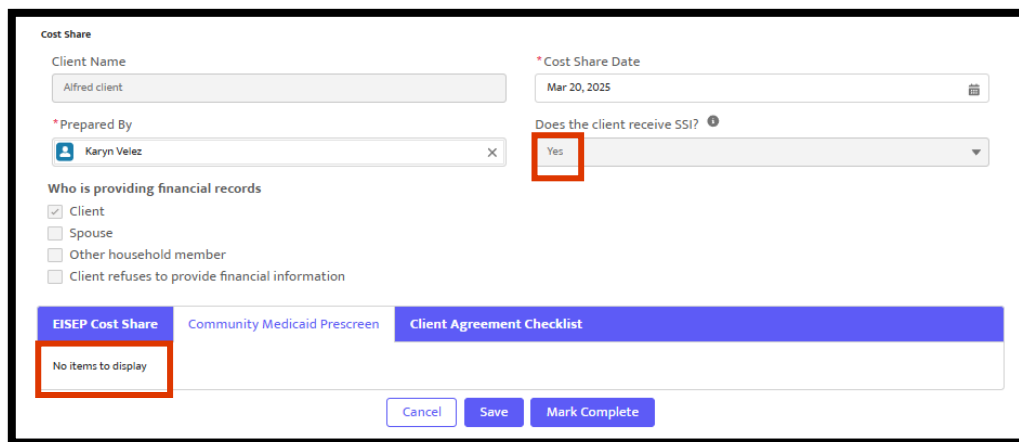
Client and Spouse

Section 1. Resources has no editable fields. Fields are pre-populated with data from the **Assets** and **Expenses** sub-tabs on the **Financial** form as well as other values associated with screening for Medicaid financial eligibility.

Section 2. Income has no editable fields. Fields are pre-populated with data from the **Incomes** and **Expenses** sub-tabs on the **Financial** form as well as other values associated with screening for Medicaid financial eligibility.

Section 3. Monthly Medical Expenses has no editable fields. Fields are pre-populated with data from the **Expenses** sub-tab on the **Financial** form as well as other values associated with screening for Medicaid financial eligibility.

If the client is in receipt of Supplemental Security Income (SSI), they are already in receipt of Medicaid. The **Community Medicaid Prescreen** form therefore, will note **No items to display**.

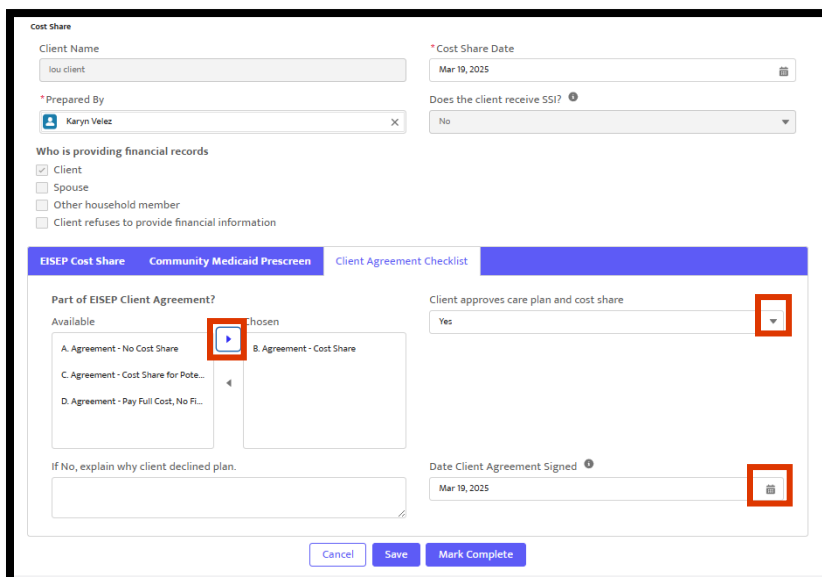


The screenshot shows the 'Cost Share' form with the 'Community Medicaid Prescreen' sub-tab selected. The 'EISEP Cost Share' sub-tab is highlighted with a red box, and the text 'No items to display' is visible within it. Other fields include 'Client Name' (Alfred client), '* Cost Share Date' (Mar 20, 2025), '* Prepared By' (Karyn Velez), and 'Who is providing financial records' (Client checked). The 'Does the client receive SSI?' dropdown is set to 'Yes'.

Client Agreement Checklist

Click the **Client Agreement Checklist** sub-tab to display the form with four editable fields.

When completing the **Part of EISEP Client Agreement?** field select the desired choice from the list in the **Available** field and use the right-pointing arrow to move the choice to the **Chosen** field. To move the item back, choose the list choice again and select the left-pointing arrow. For the field, **Client approves care plan and cost share** use the arrow on the dropdown menu to pick either **Yes** or **No**. If **No** is chosen, provide an explanation for why the client declined the plan in the **Comment** box. Use the calendar icon or type in the date in the **Date Client Agreement Signed** field.

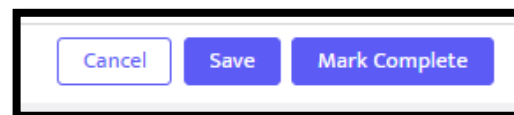


The screenshot shows the 'Cost Share' form with the 'Client Agreement Checklist' sub-tab selected. The 'Part of EISEP Client Agreement?' field is highlighted with a red box, showing a list of options in the 'Available' field and a 'Chosen' field. The 'Client approves care plan and cost share' dropdown is also highlighted with a red box, showing 'Yes' selected. Other fields include 'Client Name' (lou client), '* Cost Share Date' (Mar 19, 2025), '* Prepared By' (Karyn Velez), and 'Who is providing financial records' (Client checked). The 'Does the client receive SSI?' dropdown is set to 'No'.

NOTE: If the client is in receipt of Supplemental Security Income (SSI), they already receive Medicaid, so there is no need to complete the **Client Agreement Checklist** form.

Mark Complete

At the bottom of each of these sections, EISEP, Cost Share, Community Medicaid Prescreen and Client Agreement Checklist, there are three buttons: **Cancel**, **Save**, and **Mark Complete**.



- **Cancel** exits you from the form, returns you to the **Cost Shares** List View, and does not save your data.
- **Save** returns you to the **Cost Shares** List View, saves any entries from any sub-sections and the cost share is in **Draft** status.
- **Mark Complete** opens the **Confirm Mark Complete** pop-up. Select **Yes** if all sub-sections are completed. You return to the **Cost Shares** List View and the cost share will have a status of **Complete** and is ready to use in the **Home Care Service Plan** referral process.

NOTE: A new Cost Share cannot be created if a Cost Share is listed in **Draft** status. The error message, “**Cost share already exists in draft status**” appears and you cannot complete the process. A new Cost Share can only be completed when previous Cost Shares are listed in **Completed** or **Inactive** status.

Summary & Care Plan Notes

The **COMPASS Summary** (assessment, reassessment or event-based) and associated **Care Plan Notes** are a **Note Type** option that can be documented in **Case Notes**. What follows are the navigational instructions for inputting this data into **Case Notes**.

Adding a Summary & Case Note

Step 1: On **Enrollment Details Menu** select the **Case Notes** tab. If you do not see the tab, select **More** and choose **Case Notes** from the dropdown menu. The **Case Notes** List View provides the ability to add notes, print notes and find specific notes using the **Filter** button.

The image shows three overlapping screenshots of the VIVÉ Case Management system interface. The top screenshot displays the 'Enrollment Details' tab with a 'More' dropdown menu where 'Case Notes' is selected. The middle screenshot shows the 'Case Notes' list view, where the 'New Case Note' button is highlighted. The bottom screenshot shows the 'New Case Note' form, which includes fields for 'Service Date' (pre-filled with Mar 20, 2025), 'Contact With' (test-clarey client (Client)), 'Status' (Draft), and 'Note Type' (Assessment Summary, highlighted). The 'Subject' field contains 'Initial Assessment Summary'. The 'Notes' text area contains a sample text about an 82-year-old client. A 'Share with Other Programs?' checkbox is present and highlighted, along with 'Cancel' and 'Submit' buttons.

Step 2: The **New Case Note** pop-up displays fields pre-populated with the current date, the client's name and the note status of **Draft**. Select the dropdown arrow for **Note Type** to choose **Assessment Summary**, enter a **Subject** heading and type in or copy and paste the summary in the **Notes** box which allows up to 10,000 characters. If you want other programs to see the note, click the **Share with Other Programs?** checkbox. Then select **Submit**.

You return to the **Case Notes** List View where pertinent information about the note is displayed such as its **Status** and if it has been shared with other programs or only accessible by your program. The note remains in **Draft** status until it is either determined **Final** or **Inactive**.

The screenshot displays the 'Case Notes' list view. At the top, there are tabs for 'Enrollment Details', 'Forms', 'Assessments', 'Waitlist', 'Cost Share Plan', 'Meal Delivery Plan', 'Case Notes', and 'More'. Below the tabs, there are date filters and a 'Filter' button. The main area shows 'Case Notes (1)' with a 'New Case Note' and 'Print Case Notes' button. A table lists the notes with columns: Subject, Note Type, Service Date, Status, Notes, Program Name, Own/Share, Created By, and Created Date. One note is listed: 'Initial Assessment Summary' (Assessment Summary, 03/20/25, Draft). At the bottom, there are pagination controls showing 'Showing 1 of 1 Page(s)' and 'Total Records: 1'.

Editing a Case Note

Step 1: On the **Case Notes** List View, select the **Subject** link. The note's **Details** form displays with the written note in its entirety as well as other note details which are not editable.

Subject	Note Type	Service Date	Status	Notes	Program N...	Own/Share...	Created By	Created Da...
Initial Assessment	Assessment Su...	03/20/25	Draft	ASSESSMENT S...	Case Managem...	Own	Karyn Velez	03/20/25

Step 2: Select any pencil icon. The **Details** form displays dropdown menus and text fields that can be edited. The **Cancel**, **Exit** and **Save** buttons also display. Selecting **Cancel** removes you from the editable form and brings you back to the original **Details** note form. **Exit** returns you to the **Case Notes** list view without any saved edits. **Save** returns you to the original **Details** form with all edit updates and once reviewed, you can return to the **Case Notes** list view by using the **Exit** button at the bottom of this form.

Details

* = Required Information

Service Date: 3/20/2025

Status: Draft

* Subject: Initial Assessment Summary

Note Type: Assessment Summary

Program Name: Case Management - NSHOPP - CMA

Notes: ASSESSMENT SUMMARY
test-clarey client is an 82-year-old, single, black female of Jamaican descent who

Created By: Karyn Velez

Last Modified By: Karyn Velez

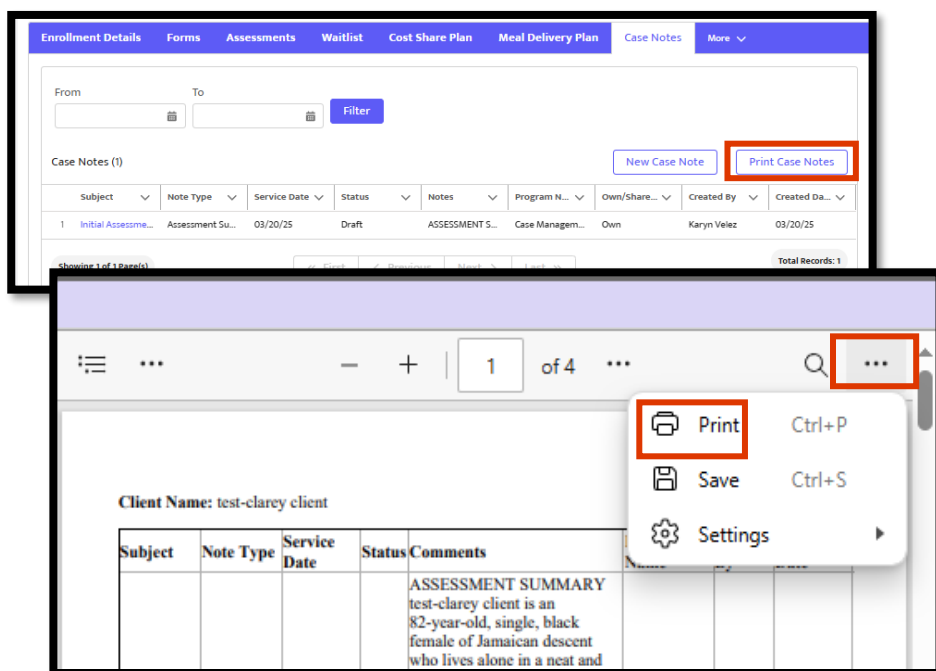
Owner: Case Management - NSHOPP - CMA

Buttons: Cancel, Save, Exit

A note in **Draft** status can continue to be edited. A note in **Final** status cannot be edited in the future and any attempts to edit the note, after **Save** is selected, prompts the error message, **We hit a snag**, stopping the process. You can also change the status of the Note to **Inactive** by picking this action from the **Status** dropdown menu.

Printing a Case Note

Step 1: Select **Print Case Notes** on the **Case Notes** List View. A pop-up displays with the print preview for the note.



Step 2: Select the 3-dots at the top right of the window to access the dropdown menu selection. Choose **Print**. Exit the pop-up and return to the **Case Notes** List View.

TIPS: The **Care Plan Issues/Goals** form is not yet available in VIVÉ. **Create a Care Plan Note** for each of the client’s presenting issues be added at the end of the assessment summary.

To create a note, here are some “best practice” guidelines of what to include:

- Describe the older person’s **Presenting Issue, Want or Desire**.
- State what the older person’s **Goal** is in addressing the issue/want/desire.
- List achievable **Action Step(s)** to accomplish the older person’s goal.
- Describe what **Strengths** the older person brings to help in accomplishing their goal.

It is suggested that a note be created for **each issue** along with an associated goal and action step(s).

For example:

Client needs Home Delivered Meals to address food insecurity. Referral will be made for Hot Regular meals daily, Chilled meals for 6th and 7th meals.

Client needs Home Care to address several unmet needs. Is not eligible for Medicaid. Will complete Cost Share and authorize EISEP Home Care and send referral for service.

Client scored 8 on NSI. Discussed benefits of Nutrition Counseling. Will send referral for service.

Client could benefit from Friendly Visiting due to social isolation. Will send referral to Friendly Visiting Program.

Client agreed to this Care Plan. She has a positive personality, very collaborative and was organized during the discussion.

Meal Delivery, Home Care & Friendly Visiting Service Plans

There are three service plans in VIVÉ: **Meal Delivery Plan**, **Home Care Service Plan** and **Friendly Visitor Service Plan**. Access them from the **Enrollment Details Menu**. If a tab is not visible, select **More** and choose it from the dropdown menu.

Meal Delivery Service Plan

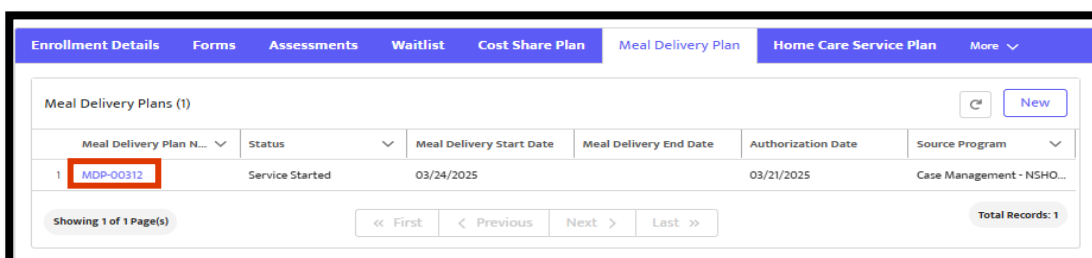
Discussion of how to create an initial **Meal Delivery Plan** can be found in the **CMA/HDM Intake/PEC Meal** section of this guide

Putting a Meal Delivery Plan on Hold

We will now focus on how to put meals on hold and terminate the meal delivery service plan.

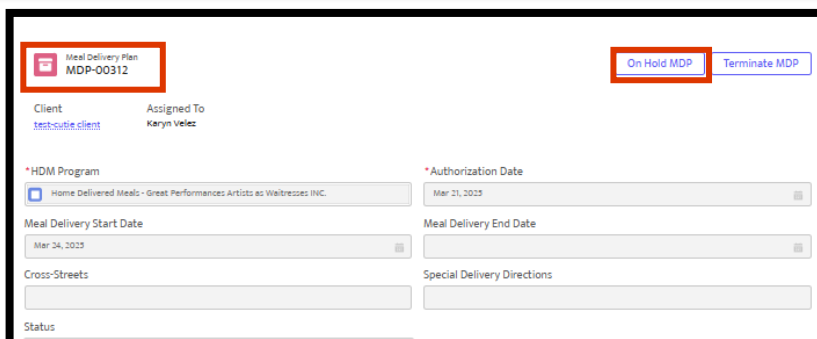
Any **Meal Delivery Plan** started by the home delivered meals program can be placed **On Hold**. To place services **On Hold**:

Step 1: Click the **Meal Delivery Plan** tab on **Enrollment Details Menu**. Click the **Meal Delivery Name** link.



The screenshot shows the 'Enrollment Details' menu with tabs for Forms, Assessments, Waitlist, Cost Share Plan, Meal Delivery Plan, Home Care Service Plan, and More. The 'Meal Delivery Plan' tab is active. Below the tabs is a table titled 'Meal Delivery Plans (1)'. The table has columns: Meal Delivery Plan N..., Status, Meal Delivery Start Date, Meal Delivery End Date, Authorization Date, and Source Program. A single row is visible with 'MDP-00312' in the first column, which is highlighted with a red box. The status is 'Service Started', the start date is '03/24/2025', the end date is '03/21/2025', and the source program is 'Case Management - NSHO...'. At the bottom, it says 'Showing 1 of 1 Page(s)' and 'Total Records: 1'.

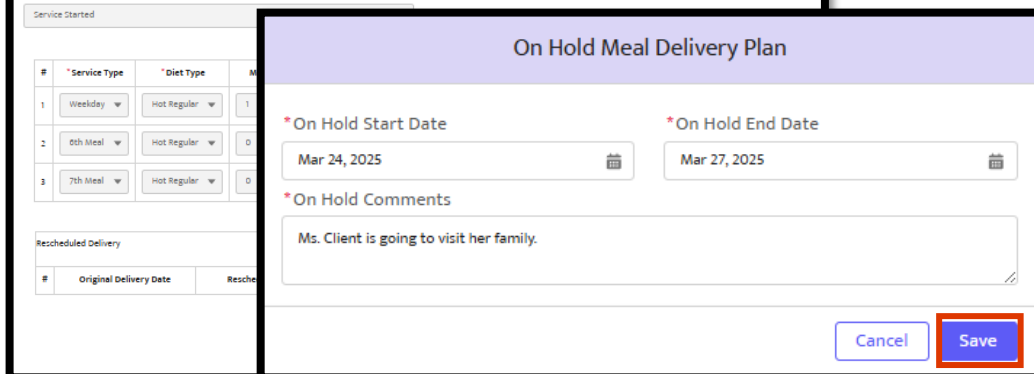
Step 2: On the **Meal Delivery Plan** details, select **On Hold MDP** from the upper right corner.



The screenshot shows the details for 'Meal Delivery Plan MDP-00312'. In the top right corner, there are two buttons: 'On Hold MDP' (highlighted with a red box) and 'Terminate MDP'. Below the buttons, the client is 'test@route.client' and assigned to 'Karyn Velez'. The HDM Program is 'Home Delivered Meals - Great Performances Artists as Waitresses INC.' and the authorization date is 'Mar 21, 2025'. The meal delivery start date is 'Mar 24, 2025'. There are fields for 'Cross-Streets' and 'Special Delivery Directions'. The status is 'Service Started'.

Step 3: The **On Hold Meal Delivery Plan** pop-up displays. Complete all the fields and select **Save**.

You return to the service plan where the **On Hold** dates notification displays. VIVÉ automatically sends an email to the meal provider alerting them to this request.



The screenshot shows the 'On Hold Meal Delivery Plan' pop-up form. It has fields for '* On Hold Start Date' (Mar 24, 2025) and '* On Hold End Date' (Mar 27, 2025). There is a text area for '* On Hold Comments' with the text 'Ms. Client is going to visit her family.' At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

The service plan form now has an **Edit on Hold** button available. The On Hold request can be edited any time before or during the requested timeframe by selecting the **Edit on Hold** button.

Editing an On Hold Request

Step 1: From the **Meal Delivery Plan** page, select **Edit on Hold** button.

Step 2: From the **Edit On Hold Meal Delivery Plan** pop-up, make edits, then select **Save**. If the request needs to be cancelled prior to the start date, select the **Remove on Hold** button. You return to the **Meal Delivery Plan** form where the On Hold request notification is now removed and the **On Hold MDP** button returns. Select **Cancel** to return to the **Meal Delivery Plan** List View.

Terminating a Meal Delivery Plan

Step 1: From the **Enrollment Details** menu, click **Meal Delivery Plan** tab. Click the **Meal Delivery Plan** number link.

Step 2: From the **Meal Delivery Plan** details page, select **Terminate MDP**.

Step 3: From the **Edit Meal Delivery Plan Termination** pop-up enter a future termination date, pick a **Termination Code**, and enter a **Termination Reason** before selecting **Save**.

The screenshot shows the 'Meal Delivery Plan' details page for MDP-00312. The 'Client' is 'test-cutie.client' and 'Assigned To' is 'Karyn Velez'. The 'HDM Program' is 'Home Delivered Meals - Great Performances Artists as Waitresses INC.' and the 'Authorization Date' is 'Mar 21, 2025'. The 'On Hold MDP' and 'Terminate MDP' buttons are highlighted with red boxes. Below this, the 'Edit Meal Delivery Plan Termination' pop-up is shown. It contains fields for 'Termination Date' (Mar 26, 2025), 'Termination Code' (Termination Reason 1), and 'Termination Reason' (Client moving to daughter's home.). The 'Save' button is highlighted with a blue box.

You return to the service plan where the termination date notification is displayed. VIVÉ automatically sends an email to the home care provider alerting them to this request. The service plan form displays the termination date in the **Meal Delivery End Date** field and an **Edit MDP Termination** button is now available.

The screenshot shows the 'Meal Delivery Plan' details page for MDP-00312. A red box highlights the notification: 'This Meal Delivery Plan is scheduled to be Terminated on 3/26/2025'. The 'On Hold MDP' and 'Edit MDP Termination' buttons are highlighted with red boxes. The 'HDM Program' is 'Home Delivered Meals - Great Performances Artists as Waitresses INC.' and the 'Authorization Date' is 'Mar 21, 2025'. The 'Meal Delivery Start Date' is 'Mar 24, 2025' and the 'Meal Delivery End Date' is 'Mar 26, 2025'.

The termination request can be edited or voided any time before the stated date of termination.

Select **Edit MDP Termination**. Make any necessary edits. To void the request, on the pop-up, select **Remove Termination**. Using the check box on the **Remove Termination** pop-up, confirm that the termination is to be voided and select **Save**.

The screenshot shows the 'Edit Meal Delivery Plan Termination' pop-up. It contains fields for 'Termination Date' (Mar 26, 2025), 'Termination Code' (Termination Reason 1), and 'Termination Reason' (Client moving to daughter's home.). The 'Remove Termination' button is highlighted with a red box.

You return to the **Meal Delivery Plan** form where the **On Hold MDP** and **Terminate MDP** buttons now display. Select **Cancel** to return to the **Meal Delivery Plan List View**. VIVÉ automatically sends an email to the home care provider alerting them to this change.

The screenshot shows the 'Remove Termination' pop-up. It contains a checkbox labeled 'Are you sure you would like to remove the Meal Delivery Termination Date which is set in future?'. The 'Save' button is highlighted with a blue box.

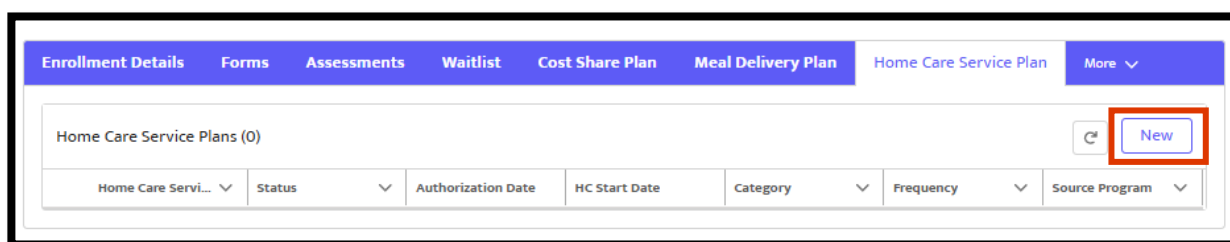
If a termination occurs and the client would like to resume services, a new **Meal Delivery Plan** and referral would need to be created.

Home Care Service Plan

The **Home Care Service Plan** tab enables you to create a service plan and send that referral to your designated **Home Care** provider.

Initial Activation of Home Care Service Plan

Step 1: From the **Enrollment Details** menu, click the **Home Care Service Plan** tab, select the **New** button.



NOTE: If New is selected and a Cost Share Plan is not completed, an error notification appears prompting you to first complete the cost share before creating a service plan for home care.

Step 2: From the **Home Care Service Plan** use the dropdown to pick the client's **Cost Share**. This populates the fields **Service Type**, **Number of Hours**, **Cost Share**

A screenshot of the 'Home Care Service Plan' form. The form contains several fields: '*Home Care Program' (dropdown), '*Status' (dropdown), '*Cost Share' (dropdown, highlighted with a red box), '*Authorization Date' (text field), '*Service Type' (dropdown), '*Category' (dropdown), '*# of Hours' (text field), and '*Frequency' (dropdown). At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red rectangle.

Monthly Amount and **Contribution Rate Per Hour** (if applicable) or **Contribution Rate Per Hour**. Confirm that all required fields are completed before selecting **Save**.

NOTE: Meal Delivery and Home Care Service cannot be referred from the "Client Profile" level because each service needs a service plan once the client is enrolled in your program.

Referring Home Care Service

Step 1: From the **Enrollment Details** menu, click the **Home Care Service Plan** tab, then click the desired **Home Care Service Plan ID** link.

Step 2: On the draft plan, which is editable, select the **Create Referral** button in the upper right corner.

The screenshot shows a form for a Home Care Service Plan (ID: HC-00177). The status is 'Draft'. In the top right corner, there is a button labeled 'Create Referral' which is highlighted with a red box. Other fields include Contact (Mehvash client), Assigned To, Home Care Program (Home Care - PERSONAL TOUCH - Bronx), Cost Share (CD-00307 - Complete), Authorization Date (Mar 20, 2025), Service Type (Homemaker/Personal Care), # of Hours (8), Frequency (weekly), and Contribution Rate Per Hour (1.43).

Step 3: The **Client Referral Form** pop-up displays with pre-populated fields and an editable **Comments** text box. Add any necessary comments and select **Save**.

NOTE: If a Consent to Share/Refer is not completed, the system prompts you to complete one prior to saving. You return to the draft plan where an alert regarding the successful sharing of the plan with the home care provider displays and you no longer see the **Create Referral** button.

The screenshot shows the 'Client Referral Form' pop-up. It contains fields for Referral Date (Mar 21, 2025), Source Program (Case Management - NSHOPP - CMA), Target Program (Home Care - PERSONAL TOUCH - Bronx), and Home Care Service Plan (HC-00177 (Draft)). There is a 'Comments' text box and a 'Service Requested' section with 'Available Services' (Emergency Personal Care, Housekeeping/Chore) and 'Selected Services' (Homemaker/Personal Care). At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

The plan remains in **Draft** status until the home care program decides if the plan is accepted or not. Once the service plan is started by the home care program, the plan's status changes to **Service Started**.

TIP: To confirm that your referral was sent, check the **Referral Queue** with the filter **Referrals Shared by my Program**. See above instructions: *Best Practice, Confirm Referral is Sent*

Requesting a Service Plan to be Placed On Hold

Any **Home Care Service Plan** started by the home care program, can be placed **On Hold**. To place services **On Hold**:

Step 1: From the **Enrollment Details** menu, click the **Home Care Service Plan** tab, click the desired **Home Care Service Plan ID** link.

Step 2: On the **Home Care Service Plan** details page in the upper right corner there are two buttons: **On Hold Home Care** and **Terminate Home Care**. Select **On Hold Home Care**.

The screenshot shows the 'Home Care Service Plan' details page for plan HC-00177. The plan is assigned to Karyn Velez and is currently 'Service Started'. The 'On Hold Home Care' button is highlighted with a red box. Other fields include 'Contact' (test-cutie.client), 'For CMA Only' (checked), 'Home Care Program' (Home Care - PERSONAL TOUCH - Bronx), and 'Status' (Service Started).

Step 3: The **On Hold** pop-up displays. Complete all required fields and select **Save**. You return to the service plan where the requested dates are displayed. VIVÉ automatically sends an email to the home care provider alerting them to the request.

The 'On Hold' pop-up form displays fields for 'On Hold Start Date' (Mar 24, 2025), 'On Hold End Date' (Mar 27, 2025), and 'On Hold Comments' (Ms. Client will be visiting family). The 'Save' button is highlighted with a red box.

The service plan form now has an **Edit on Hold** button available. The **On Hold** request can be edited any time before or during the requested timeframe.

The screenshot shows the 'Home Care Service Plan' details page for plan HC-00177. A red banner at the top states: 'This Home Care Plan is scheduled to be On Hold from 3/24/2025 to 3/27/2025'. The 'Edit on Hold' button is highlighted with a red box. Other fields include 'Contact' (test-cutie.client), 'Assigned To' (Karyn Velez), 'For CMA Only' (checked), 'Home Care Program' (Home Care - PERSONAL TOUCH - Bronx), 'Status' (Service Started), 'Cost Share' (CS-00307), and 'Authorization Date' (Mar 20, 2025).

Editing an On Hold Request

Step 1: Select **Edit on Hold** to open the **On Hold** pop-up. Edits can be made to any of the required fields before selecting **Save**.

If the request needs to be cancelled prior to the start date, select the **Remove on Hold** button. You return to the **Home Care Service Plan** form where the On Hold request notification is now removed and the **On Hold Home Care** button returns.

Terminating Home Care Services

Step 1: From the **Enrollment Details** menu, click the **Home Care Service Plan** tab, click the desired **Home Care Service Plan ID** link.

Step 2: On the **Home Care Service Plan** details page select **Terminate Home Care**.

Step 3: A pop-up displays. Complete all required fields. For the **Termination Code** select from the dropdown menu. Select **Save** when completed.

You return to the service plan where the termination date is displayed. VIVÉ automatically sends an email to the home care provider alerting them to the termination. The service plan form now has an **Edit Home Care Termination** button available.

Edit Home Care Termination

The termination request can be edited any time before the stated date of termination.

Step 1: On the **Home Care Service Plan** details page, select **Edit Home Care Termination**.

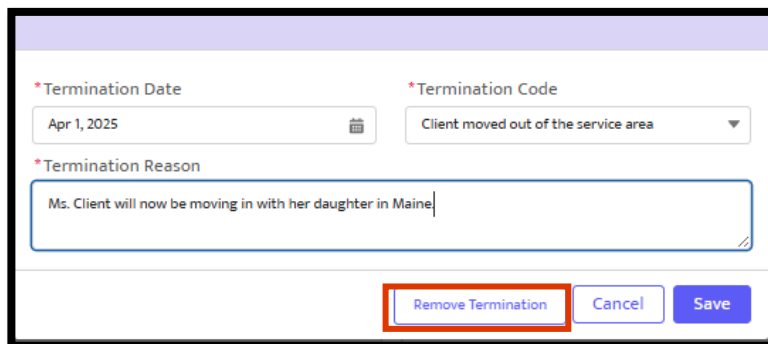
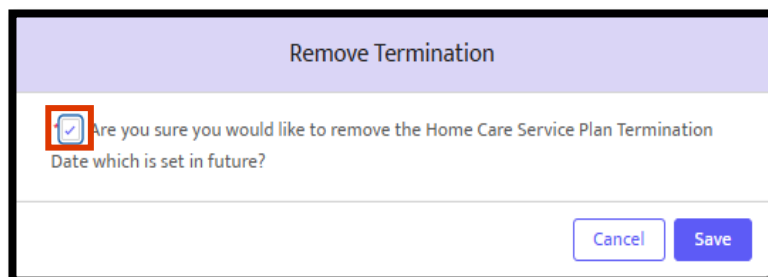
Step 2: On the pop-up, select **Remove Termination**.

Step 3: On the **Remove Termination** pop-up, confirm that the termination is voided and select **Save**.

You return to the **Home Care Service Plan** form where the **On Hold Home Care** and **Terminate Home Care** buttons displays.

Select **Cancel** to return to the **Home Care**

Service Plans List View. VIVÉ automatically sends an email to the home care provider alerting them to this change.

A screenshot of a web form for editing a Home Care Termination. The form has a light purple header. It contains three main sections: 1. Termination Date: A text input field with 'Apr 1, 2025' and a calendar icon. 2. Termination Code: A dropdown menu with 'Client moved out of the service area' selected. 3. Termination Reason: A large text area containing 'Ms. Client will now be moving in with her daughter in Maine'. At the bottom right, there are three buttons: 'Remove Termination' (highlighted with a red box), 'Cancel', and 'Save'.A screenshot of a confirmation pop-up titled 'Remove Termination'. It has a light purple header. The main content area contains a checkbox with a blue checkmark, followed by the text 'Are you sure you would like to remove the Home Care Service Plan Termination' and 'Date which is set in future?'. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

If the termination occurs and the client would like to resume services, a new **Home Care Services Plan** and referral need to be created.

TIP: To ensure the Home Care Service Program's notation regarding the termination of services is in sync with your program's it is suggested that a separate email be sent to the home care service program with the specifics regarding the **Termination Code** and **Termination Reason**.

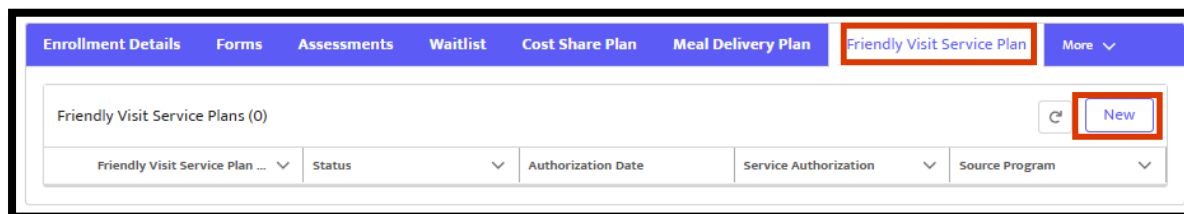
Friendly Visiting Service Plan

The **Friendly Visiting Service Plan** enables you to create a service plan and send that referral to your designated **Friendly Visiting** provider.

NOTE: Referrals for friendly visiting services must **only** be sent via the **Referrals** tab on the **Enrollment** level. Referrals sent from the "Client Profile" level do not generate the Friendly Visiting Service Plan needed by the friendly visiting program to provide services to the client.

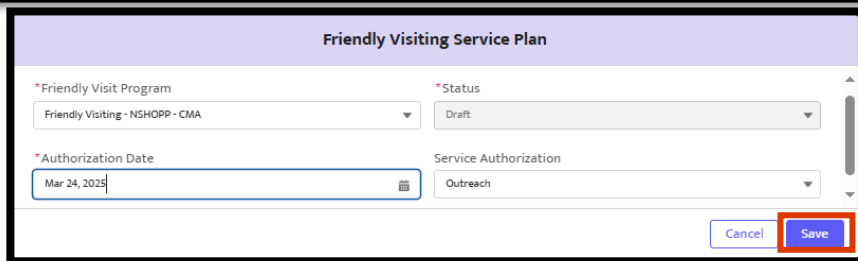
Initial Activation of Friendly Visiting Service Plan – Enrollment Level

Step 1: From the **Enrollment Details** menu, click on the **Friendly Visiting Service Plan** tab. A List View displays. Select **New**.



The screenshot shows the 'Enrollment Details' menu with several tabs. The 'Friendly Visit Service Plan' tab is highlighted with a red box. Below the tabs, there is a list view titled 'Friendly Visit Service Plans (0)'. A 'New' button is highlighted with a red box.

Step 2: The **Friendly Visiting Service Plan** pop-up displays. Confirm that all required fields are completed before selecting **Save**.



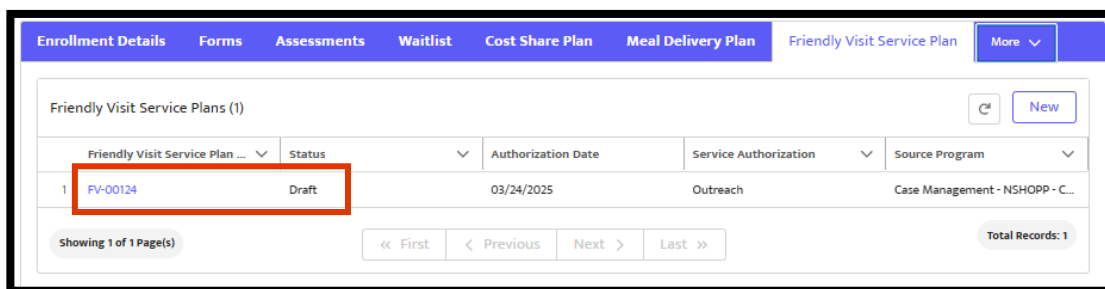
The screenshot shows the 'Friendly Visiting Service Plan' form. The 'Friendly Visit Program' is set to 'Friendly Visiting - NSHOPP - CMA'. The 'Status' is set to 'Draft'. The 'Authorization Date' is 'Mar 24, 2025'. The 'Service Authorization' is set to 'Outreach'. The 'Save' button is highlighted with a red box.

You return to the **Friendly Visiting Service Plan** List View where pertinent information displays, including the status of **Draft**.

NOTE: If a Consent to Share/Refer is not completed, the system prompts you to complete one prior to saving. You return to the Referrals list view where the referral is noted as sent. The system automatically sends an email to the friendly visiting program regarding the request.

Referring the Friendly Visiting Service Plan

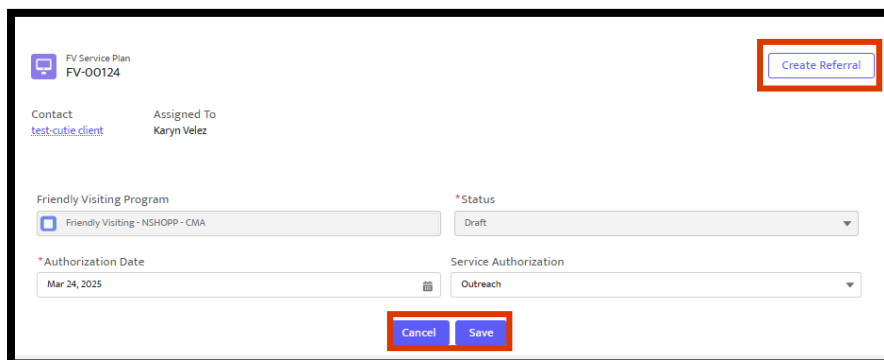
Step 1: From the **Enrollment Details** menu, click on the **Friendly Visiting Service Plan** tab. Click on a draft **Friendly Visiting Service Plan Name** number link.



The screenshot shows the 'Enrollment Details' menu with the 'Friendly Visit Service Plan' tab selected. Below the tabs, there is a list view titled 'Friendly Visit Service Plans (1)'. A table lists the plans. The first row is highlighted with a red box, showing the plan ID 'PV-00124' and status 'Draft'.

	Friendly Visit Service Plan ...	Status	Authorization Date	Service Authorization	Source Program
1	PV-00124	Draft	03/24/2025	Outreach	Case Management - NSHOPP - C...

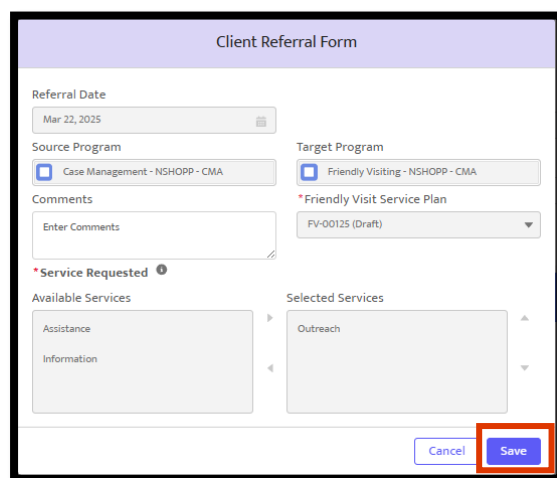
Step 2: The draft plan, which is editable, displays **Cancel**, **Save** and **Create Referral** buttons. Selecting **Cancel** brings you back to the List View. You select **Save** only if you have made edits to the form and are not ready to send the referral. This action also returns you to the List View. When you are ready to send the referral, select **Create Referral**.

The screenshot shows a web form titled "FV Service Plan" with ID "FV-00124". It includes fields for "Contact" (test-joe client), "Assigned To" (Karyn Velez), "Friendly Visiting Program" (Friendly Visiting - NSHOPP - CMA), "Status" (Draft), "Authorization Date" (Mar 24, 2025), and "Service Authorization" (Outreach). At the top right is a "Create Referral" button. At the bottom are "Cancel" and "Save" buttons.

Step 3: The **Client Referral Form** pop-up displays with pre-populated fields and an editable **Comments** text box. Add any necessary comments and select **Save**.

NOTE: If a *Consent to Share/Refer* is not completed, the system prompts you to complete one prior to saving.

You return to the draft plan and no longer see the **Create Referral** button.

The screenshot shows a "Client Referral Form" pop-up. It contains fields for "Referral Date" (Mar 22, 2025), "Source Program" (Case Management - NSHOPP - CMA), "Target Program" (Friendly Visiting - NSHOPP - CMA), "Comments" (with an "Enter Comments" text box), "Service Requested" (with a "Service Requested" icon), "Available Services" (Assistance, Information), and "Selected Services" (Outreach). At the bottom right, the "Save" button is highlighted.

TIP: To confirm that your referral was sent, check the **Referral Queue** with the filter **Referrals Shared by my Program**. See above instructions: *Best Practice, Confirm Referral is Sent*

If the referral is acknowledged or accepted by the friendly visiting program, the update reflects on the **Referral Queue** list **Referrals shared by my Program**. If the referral is rejected, VIVÉ automatically sends an email on the friendly visiting program's behalf regarding the referral rejection.

New York City De... Sandbox: Referral Rejected Sun 3/23/2025 2:47 ... 188 KB
Hello, A referral for "test-joe client (0999001521)" has been rejected from "Friendly Visiting - NSHOPP - CMA". Regards, NYC Aging - VIVÉ <end>

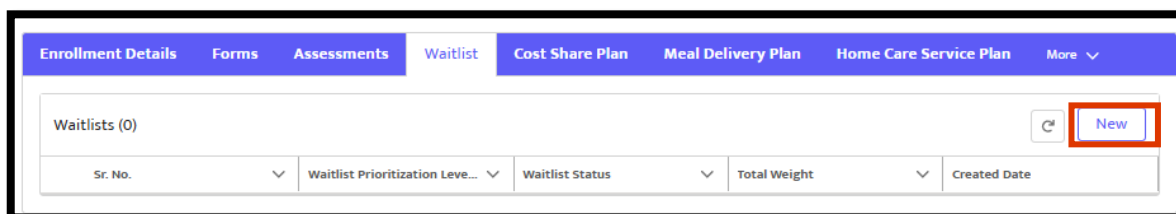
NOTE: Once the Friendly Visiting Service Plan is accepted and starts service for the client, you cannot place the service on hold or terminate the service. Those actions now become the responsibility of the friendly visiting program. Therefore, if you go to the Friendly Visiting Service Plan form for a client in receipt of these services, it is read-only.

Other Program Actions

Waitlist

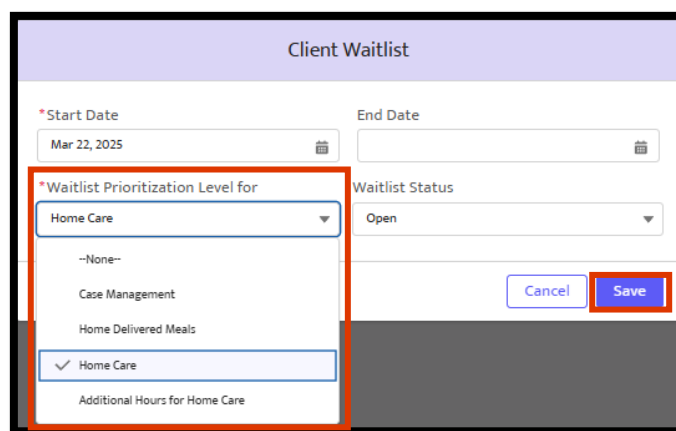
The Waitlist tab provides you with the ability to place a client on the waiting list for **Assessment**, **Home Delivered Meals**, **Home Care** and **Additional Hours for Home Care**. To place a client on the **Waitlist** for services:

Step1: From the **Enrollment Details** menu, click the **Waitlist** tab. A List View displays. Select the **New** button.



The screenshot shows the 'Waitlist' tab selected in the top navigation bar. Below the navigation bar, there is a section titled 'Waitlists (0)' with a 'New' button highlighted by a red box. Below this, there is a table with columns: 'Sr. No.', 'Waitlist Prioritization Level...', 'Waitlist Status', 'Total Weight', and 'Created Date'.

Step 2: The **Client Waitlist** pop-up displays. Pick the service that the client is waiting for from the **Waitlist Prioritization Level** dropdown menu. Confirm that all required fields are completed before selecting **Save**.



The screenshot shows the 'Client Waitlist' pop-up form. It includes fields for 'Start Date' (Mar 22, 2025) and 'End Date'. Below these, there is a dropdown menu for 'Waitlist Prioritization Level for' with 'Home Care' selected. To the right, there is a 'Waitlist Status' dropdown menu with 'Open' selected. At the bottom right, there are 'Cancel' and 'Save' buttons, with 'Save' highlighted by a red box.

The **Waitlist** form opens with pre-populated data drawn from various sections of the **COMPASS** and the **Emergency Preparedness** sub-tab on the **Details** level. The field, **Total Weight**, shows a value of zero.

Three buttons are available, **Edit**, **Re-calculate**, at the top of the form, and **Exit** at the bottom of the form.

Step 3: Select **Re-calculate** for the client's waiting list score. Select **Exit** to return to the **Waitlist** List View which displays information about the client's waiting list status.

Waitlist WL-00081

Client Waitlist

Start Date: Mar 22, 2025

End Date:

Waitlist Prioritization Level for: Home Care

Total Weight: 0

Waitlist Status: Open

IADLS

☒ Unmet Need: Shopping ☐ Unmet Need: Use Transportation

☐ Unmet Need: Laundry ☒ Unmet Need: Housework/cleaning

☐ Unmet Need: Prepare & Cook Meals

ADLS

☒ Unmet Need: Bathing ☐ Unmet Need: Mobility

☐ Unmet Need: Transferring ☐ Unmet Need: Dressing

☐ Unmet Need: Personal Hygiene ☐ Unmet Need: Toileting

☐ Unmet Need: Eating

Informal and Formal Supports

☐ Does the person have family, friends and/or neighbors who help or could help with care? = No ☐ Is the informal support received

NSI

☐ Without wanting to lost or gained 10 more pounds in the last 6 months

Assistive Devices

☐ Wheelchair dependent ☐ Walker

Emergency preparedness

Editing the Waitlist

Step 1: From the **Enrollment Details** menu, click on the waitlists identification number link to bring you to the **Waitlist** form.

Step 2: From the Waitlist details page, select **Edit**.

Step 3: On the **Edit Waitlist** pop-up make all necessary edits. Select **Save**.

If the waitlisted service is now available for the client to receive, enter an **End Date** and change the **Waitlist Status** to **Closed**.

You are notified that the change is successful, and you return to the **Waitlist** form where you can select **Exit**.

Waitlist WL-00081

Edit Waitlist

* Start Date: Mar 22, 2025

End Date: Mar 24, 2025

* Waitlist Prioritization Level for: Home Care

Waitlist Status: Closed

Cancel Save

You return to the **Waitlist** List View where the status column denotes the closure.

Enrollment Details

Forms

Assessments

Waitlist

Cost Share Plan

Meal Delivery Plan

Home Care Service Plan

More

Waitlists (1)

New

Sr. No.	Waitlist Prioritization Leve...	Waitlist Status	Total Weight	Created Date
1	WL-00081	Closed	6	03/22/2025

Showing 1 of 1 Page(s)

« First

< Previous

Next >

Last »

Total Records: 1

NOTE: To change the **Total Weight** for a client on the Wait List, data must be updated in various sections of the **COMPASS** and the **Emergency Preparedness** form.

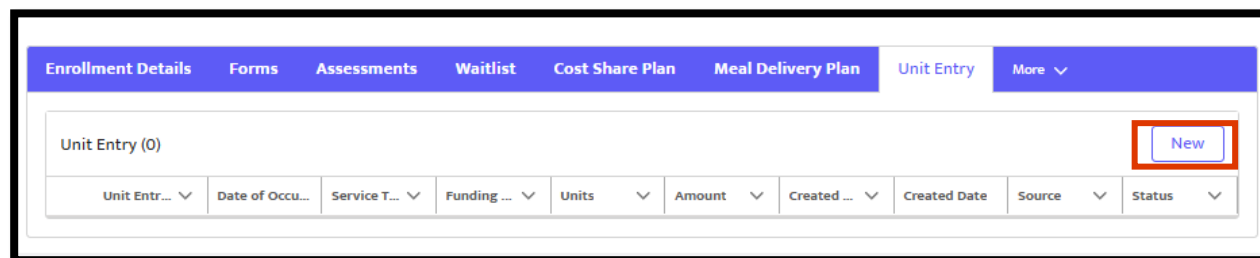
Unit Entry

The **Unit Entry** tab provides access to enter a client specific unit of service on VIVÉ. This tab is located on both the “**Client Profile**” and **Enrollment** levels.

NOTE: For Case Management programs, **Case Notes** can **only** be linked to specific units via the **Unit Entry** tab on the **Enrollment** level.

Linking a Unit Entry and Case Note

Step 1: From the **Enrollment Details Menu**, click the **Unit Entry** tab. A List View displays. Select **New**.



Enrollment Details Forms Assessments Waitlist Cost Share Plan Meal Delivery Plan Unit Entry More ▾									
Unit Entry (0) New									
Unit Entr...	Date of Occu...	Service T...	Funding ...	Units	Amount	Created ...	Created Date	Source	Status

Step 2: The **Unit Entry** form appears. On the top portion of the form, complete all required fields.

NOTE: The **Date of Occurrence** can be backdated but cannot be set in the future.

At the bottom portion of the form, is a list of all **Case Notes** associated with the client's file.

Select the checkbox for the note that pertains to this unit and select **Save**.

You return to the **Unit Entry** tab where the status of the unit is **Draft**. This status remains until the **Monthly Unit Summary** is finalized for the designated month the unit was entered.

Editing a Unit in Draft Status

Step 1: From the **Enrollment Details Menu**, click on the **Unit Entry** tab. Click the desired **Unit Entry Number** link.

Step 2: On the **Unit Entry** details page, make any necessary edits and select **Save**.

You return to the **Unit Entry** list view.

If the unit needs to be deleted, return to the **Unit Entry** details page, select the **Void Unit** button. The unit is voided, and you return to the List View where the voided status is noted.

The screenshot displays the 'Unit Entry' details page. The top section contains several input fields and dropdown menus for unit information. Below these is a 'Service Comments' text area. The bottom section features a 'Case Notes' table with columns for Subject, Note Type, Contact Name, Service Date, Status, Created Date, and Created Name. At the very bottom, there are navigation buttons: 'Cancel', 'Void Unit' (highlighted with a red box), and 'Save'.

Subject	Note Type	Contact Name	Service Date	Status	Created Date	Created Name
<input checked="" type="checkbox"/> Assessment Summary	Assessment Summary	test-cutie client	03/21/2025	Final	03/22/2025	Karyn Velez

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

Cancel **Void Unit** 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 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:

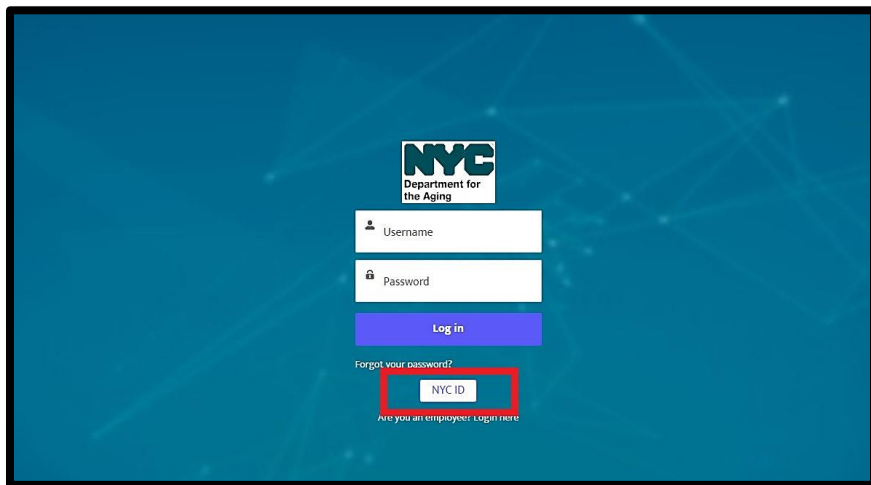
- [Logging into VIVÉ](#)
- [Accessing NYC.ID](#)

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.

VIVÉ Knowledge Base – NYCID

- 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

Google

Microsoft

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.

*** Contact Type**
☒ Client ☐ Contact ☐ Professional

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](#))

The screenshot shows the 'Client Search' form. At the top, the 'Contact Type' section has three radio buttons: 'Client' (selected), 'Contact', and 'Professional'. Below this are input fields for 'First Name' (containing 'Joy'), 'Last Name' (containing 'Chi'), 'Date of Birth', 'Client ID', 'Phone', and 'Email'. There is a checkbox for 'Search by address?'. At the bottom, there are two buttons: 'Search' (highlighted) and '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.



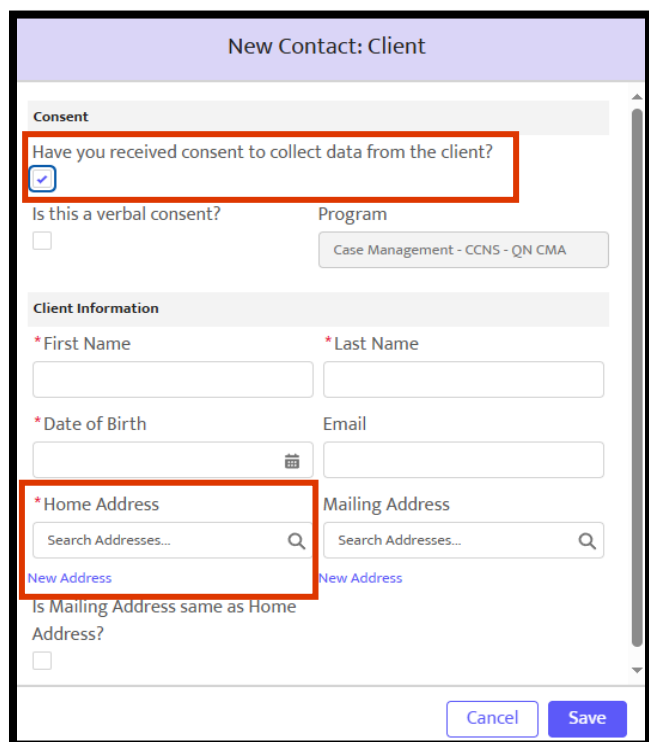
To enable the 'New Client' button, confirm that no matching result was found.

☒ 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](#).)



New Contact: Client

Consent

☒ Have you received consent to collect data from the client?

Is this a verbal consent? ☐ Program Case Management - CCNS - QN CMA

Client Information

* First Name * Last Name

* Date of Birth Email

* Home Address Mailing Address

Search Addresses... Search Addresses...

New Address New Address

Is Mailing Address same as Home Address? ☐

Cancel Save

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

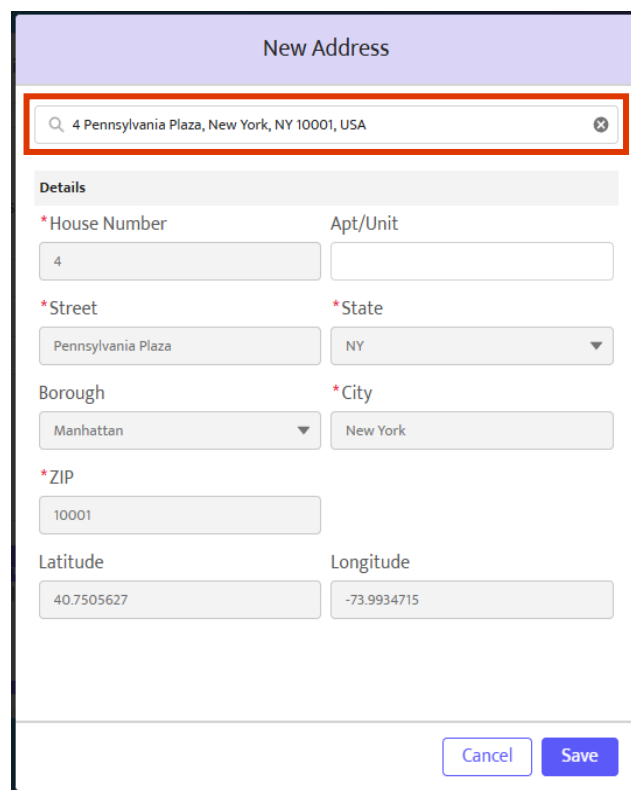
To find addresses, there is a search box for the Home Address. Enter an address and if it was previously entered, then you can select it. Please note the address including the apartment number must match.

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.

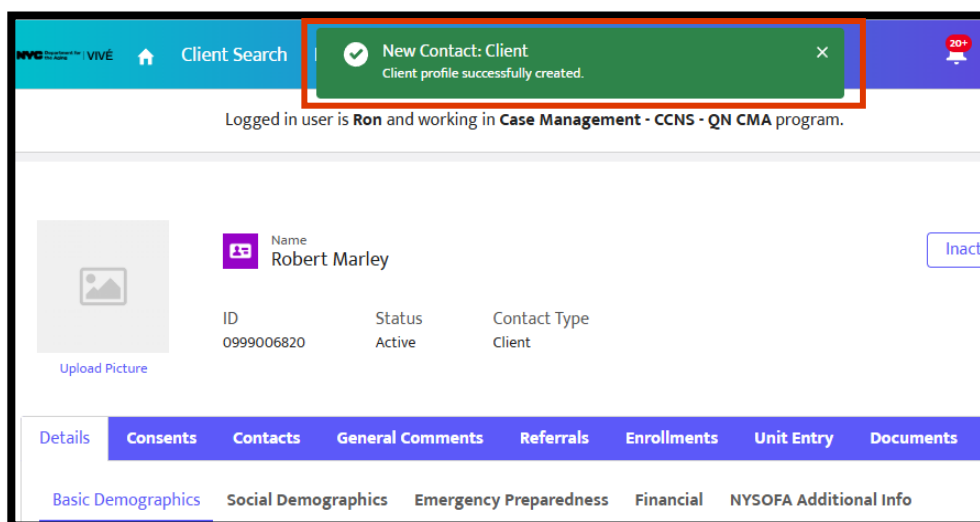
Once you've selected the address, the remaining fields will be populated. **You will need to add the Apt/Unit field.**

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



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:

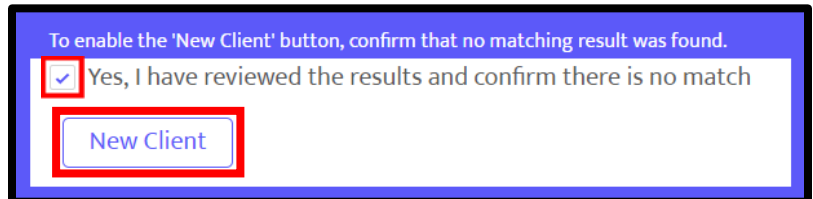
Accessing, updating, or editing information on a client with an existing profile in VIVÉ (e.g. a new client with your program who is/was a client of another NYC Aging-funded program).

NOTE: Unless revoked by the client, you will only be prompted to document and upload 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**.

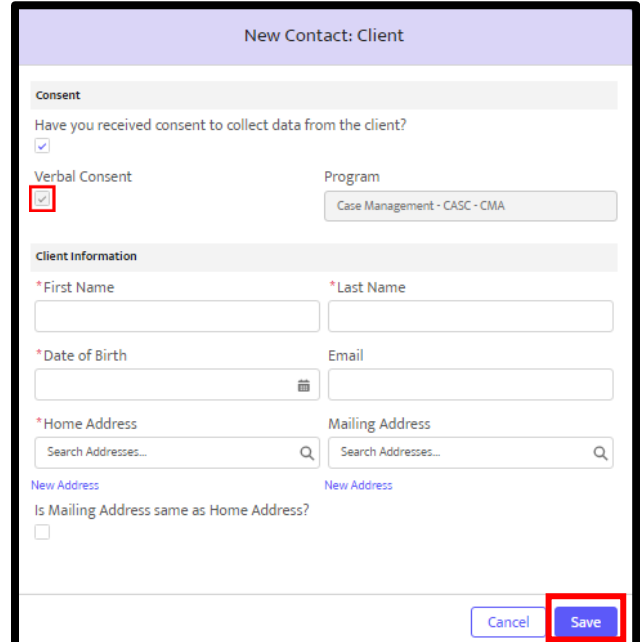


Step 3: In the **New Contact: Client** pop-up window you must first indicate that you have received consent to collect data from your client by checking the box.

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).



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 need first need to obtain their consent to view their record.

VIVÉ Knowledge Base – Consent

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**.

The screenshot shows the client profile for 'CMA Client'. The 'Consents' tab is selected and highlighted with a red box. Below the tab, there is a 'Consents (0)' section with a 'New' button highlighted with a red box. The table below has columns: Number, Consent Status, Consent Type, External Agency, and Is Global Consent?.

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

The 'New Consent' window shows the 'Consent Type' dropdown set to 'Consent To Collect Data' (highlighted with a red box). The 'Consent Status' is set to 'Active'. The 'Program' field is empty. The 'Save' button is highlighted with a red box.

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.

The screenshot shows the client profile with the 'Consents' tab selected. The table below has columns: Number, Consent Status, Consent Type, and External Agency. The first row is highlighted with a red box, showing '1', 'Consent-150578', 'Active', and 'Consent To Collect Data'.

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**

VIVÉ Knowledge Base – Consent

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

The screenshot shows a consent record for 'Consent-151207'. On the left, there is a sidebar with fields: 'Client' (New Client), 'Consent Status' (Active), and 'Program' (Case Management - NSHOPP - CMA). On the right, the 'Consent Type' section is titled 'Consent To Collect Data' and contains two options: 'Verbal Consent' with an unchecked checkbox and 'Signed Consent' with a checked checkbox. A red rectangular box highlights the 'Signed Consent' option. Below these options is an 'Edit' button.

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.

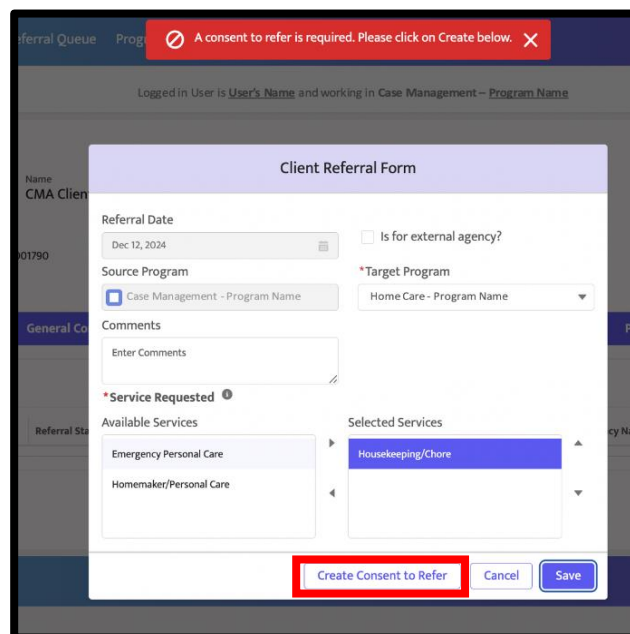
The screenshot shows a notification interface. At the top is a purple header bar with a bell icon and the text 'User's Name' followed by a dropdown arrow. Below the header, the word 'Notifications' is displayed on the left, and a link 'Mark all as read' with a close icon 'X' is on the right. The main content area shows a notification card with a blue lightning bolt icon, the title 'Missing Signed Consent to Collect Data Form', and the message 'A signed Consent to Collect Data Form is missing for "CMA Client"'. At the bottom of the card, it says 'a day ago' with a small dot.

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.



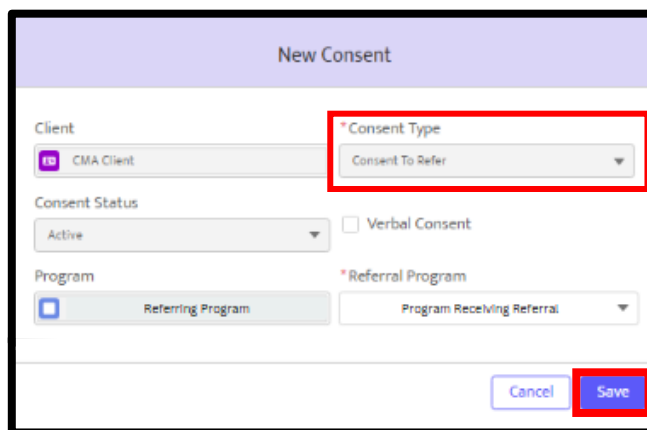
The screenshot shows the 'Client Referral Form' interface. At the top, a red banner states: 'A consent to refer is required. Please click on Create below.' The form includes fields for 'Referral Date' (Dec 12, 2024), 'Source Program' (Case Management - Program Name), 'Target Program' (Home Care - Program Name), 'Comments' (Enter Comments), and 'Service Requested' (Available Services: Emergency Personal Care, Homemaker/Personal Care; Selected Services: Housekeeping/Chore). At the bottom, there are three buttons: '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 screenshot shows the 'New Consent' pop-up window. It includes fields for 'Client' (CMA Client), 'Consent Status' (Active), 'Program' (Referring Program), and 'Referral Program' (Program Receiving Referral). The 'Consent Type' dropdown is highlighted with a red box and shows 'Consent To Refer' as the selected option. At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button also 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.

The screenshot shows the 'Consents' tab in the VIVÉ Knowledge Base. At the top, there are navigation tabs: Details, Consents, Contacts, General Comments, Referrals, Enrollments, Unit Entry, Documents, Program History, and Profile Update History. Below the tabs, there's a section titled 'Consents (1)' with a 'New' button. A table displays the consent record with columns: Number, Consent Status, Consent Type, and External Agency. The first row shows 'Consent-150795' with status 'Active' and type 'Consent To Collect Data'. Below the table, there are pagination controls: 'Showing 1 of 1 Page(s)', 'First', 'Previous', 'Next', 'Last', and 'Total Records: 1'. The 'Consent-150795' link in the table is highlighted with a red box.

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

The screenshot shows the 'Edit' form for 'Consent-150795'. The form includes fields for Client (CMA Client), Consent Status (Active), Program (Program Name), Consent Type (Consent To Collect Data), Verbal Consent (checkbox), and Signed Consent (checkbox). The 'Edit' button is 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 the 'Edit' form for 'Consent-150795' with updates. The 'Consent Status' dropdown is set to 'Revoke'. The 'Consent to Revoke received from client?' checkbox is checked. The 'Date Consent to Revoke Received?' field is set to 'Feb 28, 2025'. 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 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 for Janetta Q Shields. At the top left is a profile picture of an elderly woman with the label 'Upload Picture'. To the right, the name 'Janetta Q Shields' is shown next to a purple ID icon. Further right is a button labeled 'Inactivate Client Profile'. Below the name, fields for 'Contact Type', 'Date of Birth' (3/23/1935), and 'Phone' ((212) 602-4459) are visible. A horizontal menu bar contains tabs: 'Details' (highlighted with an orange background), 'Consents', 'Contacts', 'General Comments', 'Referrals', 'Enrollments', 'Unit Entry', 'Documents', 'Program History', and 'Profile Update History'. Below this, a sub-menu bar includes 'Basic Demographics' (highlighted), 'Social Demographics', 'Emergency Preparedness', 'Financial', and 'NYSOFA Additional Info'. The 'Basic Demographics' section contains form fields for 'ID' (0000000103), 'Status' (Active), '*Last Name' (Shields), 'Suffix', '*First Name' (Janetta), and 'Title' (a dropdown menu currently showing '--None--').

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.

The screenshot shows the 'Basic Demographics' form within the VIVÉ Client Profile. The form is divided into two columns. The left column contains fields for ID (0000000103), Last Name (Shields), First Name (Janetta), Middle Initial/Name (Q), Date of Birth (Mar 23, 1935), and Home Address (300 EAST 5TH STREET, MANHATTAN, NY 10003). The right column contains fields for Status (Active), Suffix, Title (dropdown menu), Preferred Name, Age (89), and a checkbox for 'Is Mailing Address same as Home Address?'. The 'Basic Demographics' tab is highlighted in the top navigation bar.

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 'Social Demographics' sub-tab is highlighted. The form contains the following fields:

- Current Marital Status:** A dropdown menu with 'Widowed' selected.
- Lives With:** A dropdown menu with 'Alone' selected.
- Frail and/or disabled:** A dropdown menu with '--None--' selected.
- Number of pets owned by client:** A text input field.
- Type of pets owned by client:** A section with two columns: 'Available' and 'Chosen'. The 'Available' column lists 'Cat', 'Dog', and 'Fish'. The 'Chosen' column lists '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 this, the 'Emergency Preparedness' sub-tab is highlighted. The form contains the following fields:

- * Date:** A date input field with 'Jan 20, 2025' entered.
- Consents to share emerg prep info:** A dropdown menu with '--None--' selected. Below the dropdown, there are three options: '✓ --None--', 'Yes', and 'Refuses to Provide'.

VIVÉ Knowledge Base – Client Profile

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 tab is highlighted with an orange border. The form includes several sections: 'Basic Demographics' with a date field for '* Date' (Jan 20, 2025) and a consent dropdown for 'Consents to share emerg prep info' (Yes); 'Social Demographics' with a date field for 'Revokes consent to share emerg prep info'; 'Emergency Preparedness' with a note about vaccination documentation, an 'Age' field (80), a 'Lives With' dropdown (Alone), an 'Elevator and/or Steps' dropdown (Elevator only), a 'Reliant on life-sustaining equip (LSE)?' dropdown (No, no one in the home is reliant on LSE), and a 'Client is dependent upon' section with 'Available' (Dialysis, Oxygen, Respirator, Wheelchair) and 'Chosen' (Insulin, Walker or cane) lists; and 'Communication Needs' with a 'Client's primary language' dropdown (English) and a 'Client speaks English' dropdown (Very Well).

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.

VIVÉ Knowledge Base – Client Profile

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 displays the VIVÉ Client Profile interface. At the top, a navigation bar includes tabs for Details, Consents, Contacts, General Comments, Referrals, Enrollments, Unit Entry, Documents, Program History, and a More dropdown. Below this, a sub-navigation bar highlights the Financial tab, which is also outlined with an orange box. To the left of the Financial tab are links for Basic Demographics, Social Demographics, and Emergency Preparedness. To the right is a link for NYSOFA Additional Info. The main content area shows a 'Date' field with the value 'Dec 20, 2024' and a calendar icon. A 'Cancel' button is positioned below the date field. An orange-bordered box highlights a dropdown menu titled '* Client agrees to provide financial info?'. The dropdown is currently set to '--None--' and lists three options: '--None--' (with a checkmark), 'Yes', and 'Refuse to provide'.

VIVÉ Knowledge Base – Client Profile

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 an orange box and set to '1'. Other visible fields include 'Date' (Oct 21, 2024), 'Client agrees to provide financial info?' (Yes), 'Total of Household Amount (Yearly)' (\$10,200.00), 'Total of Asset Value' (\$0.00), and 'Total of Expenses (Yearly)' (\$3,600.00).

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

The screenshot shows the 'Incomes' tab. A table lists two income sources: 'Rental Income' (750) and 'Interest' (500). A 'New' button is highlighted with an orange box in the top right corner.

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 'New Income' pop-up window 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'. It also includes a contact selection field with 'Katie Client' selected and 'Cancel' and 'Save' buttons 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**.

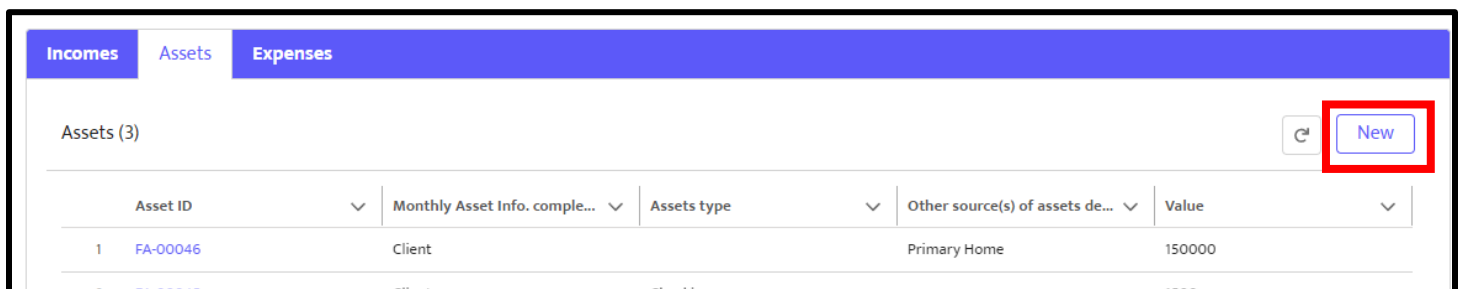
At the top of the page, there is a summary of the household size, total annual income, total assets and total expenses. If you want to see the Poverty Levels chart, click the hyperlink underneath the **Poverty Level PDF** label.

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.

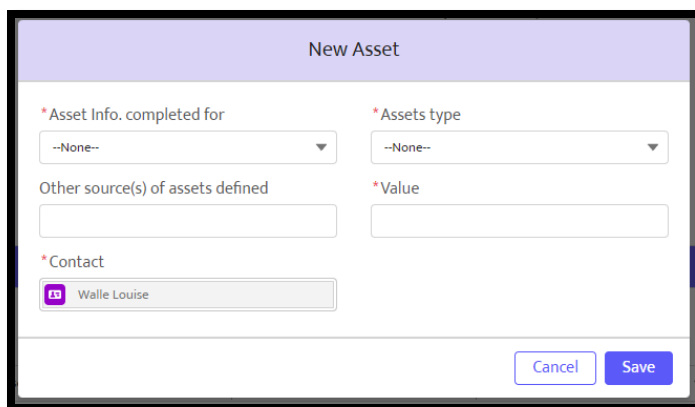
To Enter Assets

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 a blue header bar. Below the header, there's a section titled 'Assets (3)' with a 'New' button highlighted in a red box. Below this is a table with 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: 1, FA-00046, Client, Primary Home, 150000.

	Asset ID	Monthly Asset Info. comple...	Assets type	Other source(s) of assets de...	Value
1	FA-00046	Client	Primary Home		150000



The 'New Asset' pop-up form has a purple header. It contains several 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' (text input with a contact icon and the name '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.

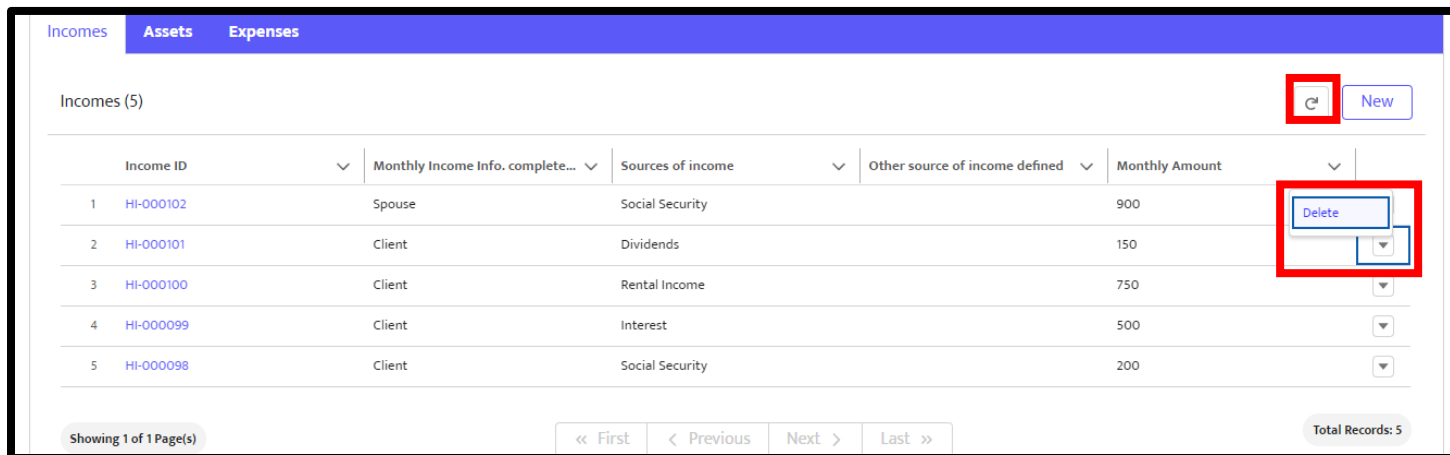
The screenshot shows a 'New Expense' form with the following fields and values:







- * Monthly Expense Info. completed for:** Client (dropdown menu)
- * Expense Type:** Housing (dropdown menu)
- * Sub Type:** Rent (dropdown menu, highlighted with a red box)
- * Monthly Amount:** 500.00 (text input)
- * Contact:** Janetta Q Shields (text input with a profile icon)

Buttons: Cancel, Save

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.

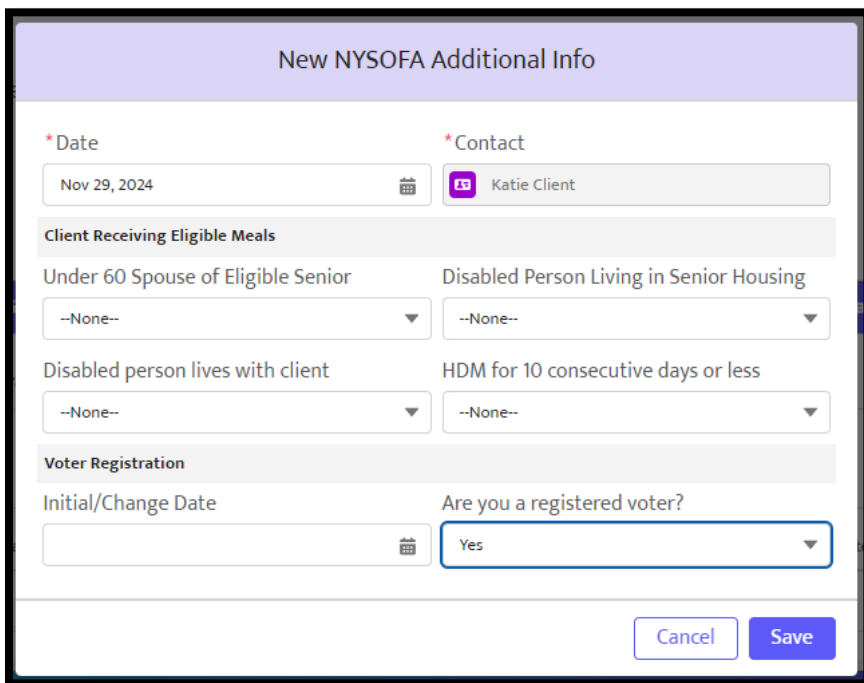


Incomes (5)						 New
Income ID	Monthly Income Info. complete...	Sources of income	Other source of income defined	Monthly Amount		
1 HI-000102	Spouse	Social Security		900		Delete
2 HI-000101	Client	Dividends		150		
3 HI-000100	Client	Rental Income		750		
4 HI-000099	Client	Interest		500		
5 HI-000098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


Showing 1 of 1 Page(s) << First < Previous Next > Last >> Total Records: 5

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: Are you a registered voter?: Yes

[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.

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 VIVE are as follows:

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

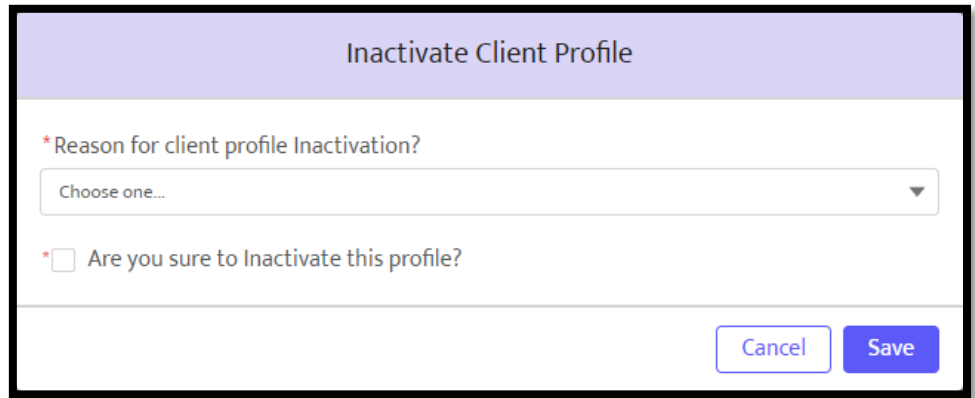
 <p>Upload Picture</p>	<p>Name Janetta Q Shields</p> <p>ID 0000000103</p> <p>Status Active</p> <p>Contact Type Client</p>	<p>Inactivate Client Profile</p>
<p>Details Consents Contacts General Comments Referrals Enrollments Documents Program History Profile Update History</p>		

VIVÉ Knowledge Base – Client Profile

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 red asterisk followed by 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 red asterisk followed by 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 are two buttons: "Cancel" (light blue) and "Save" (dark blue).

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

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- 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 Worker
 On Hold
 Closing Enrollment

Contact
[test-joe client](#)

Assigned To
 Karyn Velez

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

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

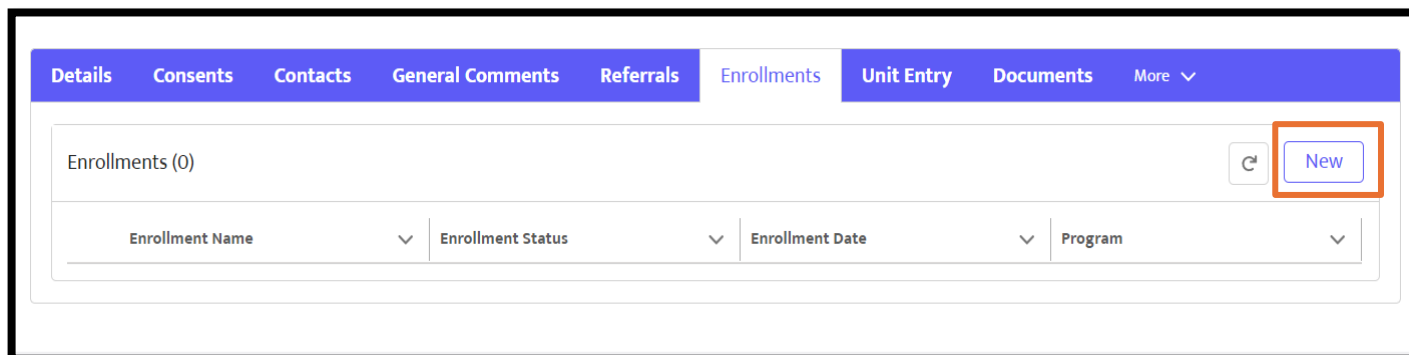
Last Modified Date

2/19/2025, 1:26 PM

Exit

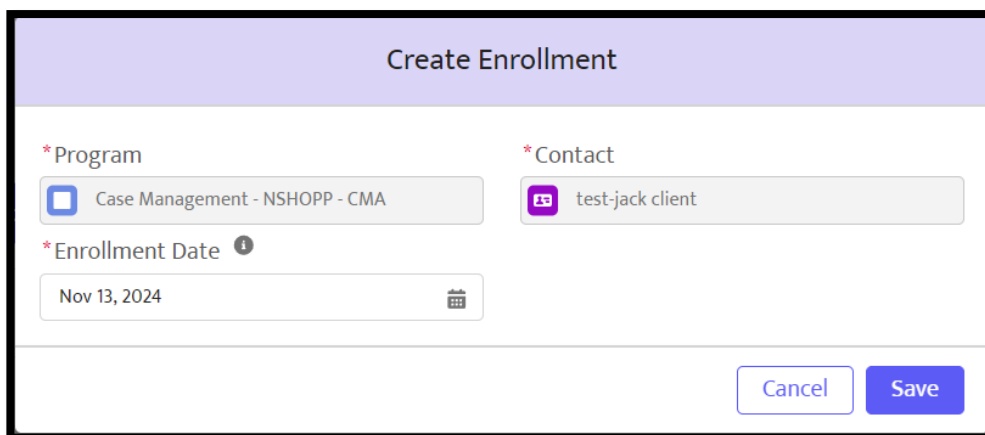
Creating a new client enrollment

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
testjack.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 Status
In Review

Enrollment Date
11/13/2024

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

Last Modified By
Karyn Velez

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

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.

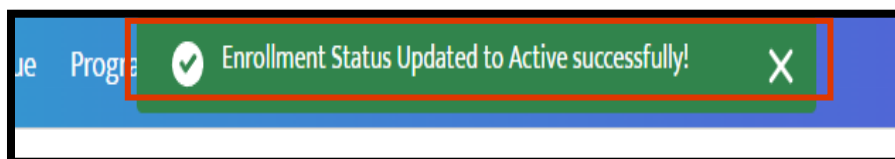
Enrollment: Additional Features

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

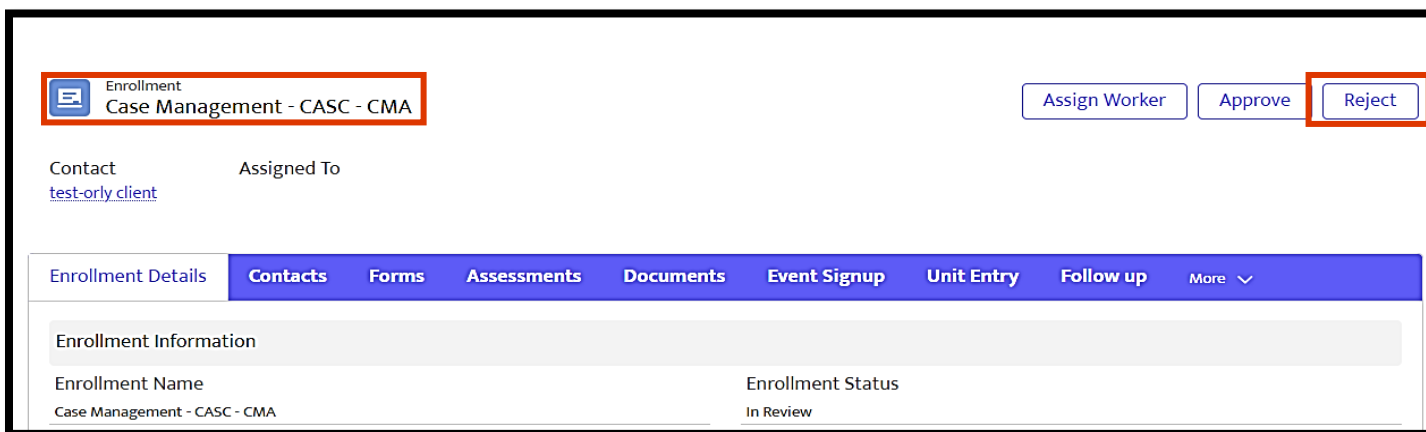
Programs who must **Approve** clients before the status of their enrollment can be updated from **In Review** to **Active** will see the **Approve** button displayed on the **Enrollment** screen. Once the **Approve** button is selected, a notification of successful activation will display. (See below)



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**.

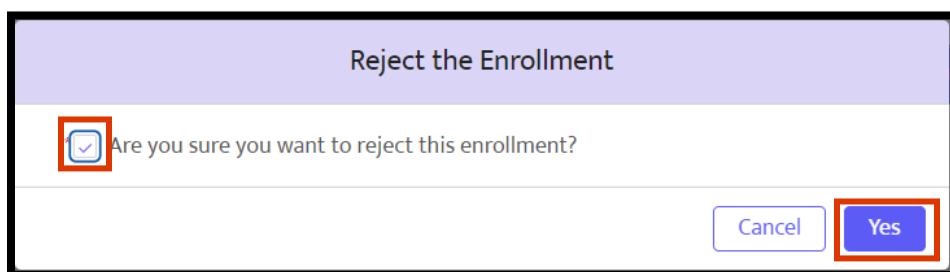
Reject Client Enrollment

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 'Assign Worker' and 'Approve' buttons are also visible. The 'Contact' is 'test-only client' and the 'Assigned To' is blank. The 'Enrollment Information' section shows 'Enrollment Name: Case Management - CASC - CMA' and 'Enrollment Status: In Review'.

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. The checkbox 'Are you sure you want to reject this enrollment?' is checked and highlighted with a red box. The 'Cancel' and 'Yes' buttons are also visible, with 'Yes' highlighted with a red box.

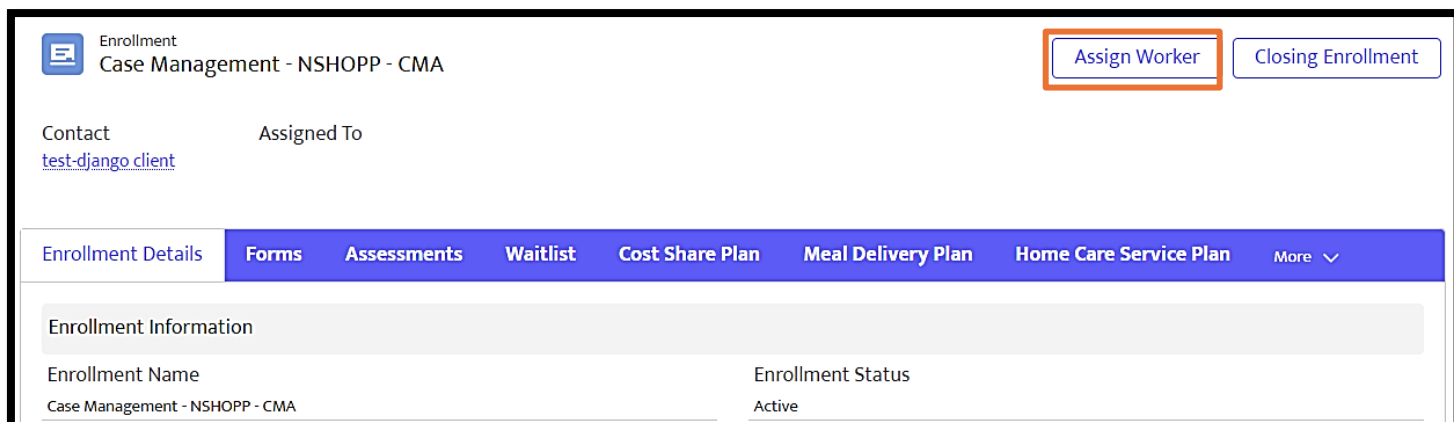
Step 3: Select Yes. The Enrollment Status will be set to Inactive on the Enrollment Details page.

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

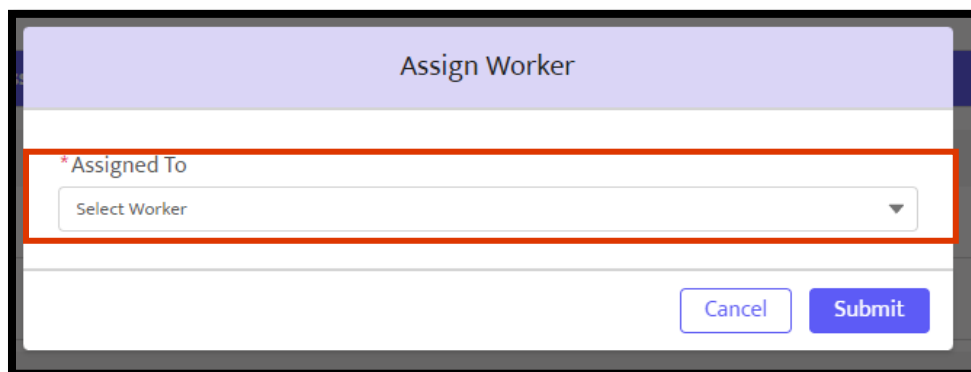
On the **Enrollment Details** screen, the **Assigned To** field will be left blank until a worker is assigned to the client enrollment.

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.



The screenshot shows the 'Enrollment Details' screen for 'Case Management - NSHOPP - CMA'. At the top right, there are two buttons: 'Assign Worker' (highlighted with an orange border) and 'Closing Enrollment'. Below the buttons, the 'Assigned To' field is currently blank, showing only the text 'Assigned To' and a link to 'test-django client'. A navigation bar at the bottom contains tabs for 'Enrollment Details', 'Forms', 'Assessments', 'Waitlist', 'Cost Share Plan', 'Meal Delivery Plan', 'Home Care Service Plan', and 'More'. Below the navigation bar, the 'Enrollment Information' section displays 'Enrollment Name' as 'Case Management - NSHOPP - CMA' and 'Enrollment Status' as '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.



The screenshot shows the 'Assign Worker' pop-up window. It has a purple header with the title 'Assign Worker'. Below the header, there is a dropdown menu labeled '* Assigned To' with the placeholder text 'Select Worker'. At the bottom right of the window, there are two buttons: 'Cancel' and '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](#) X

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

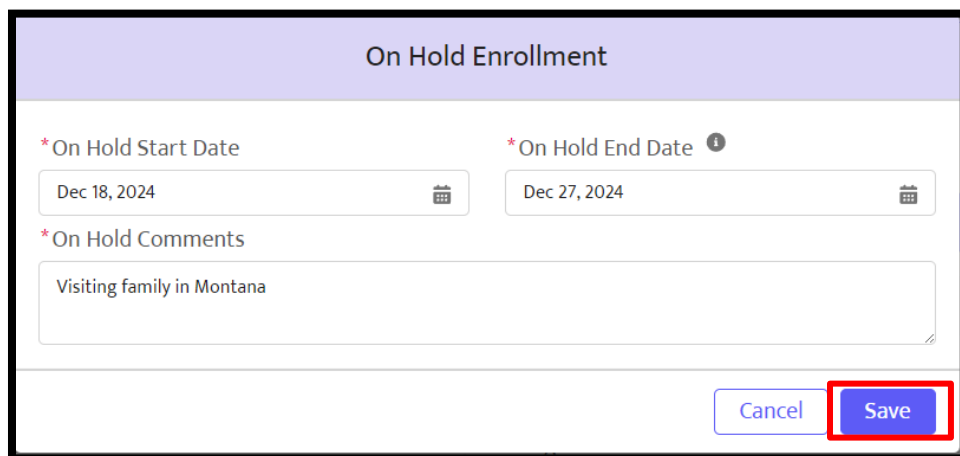
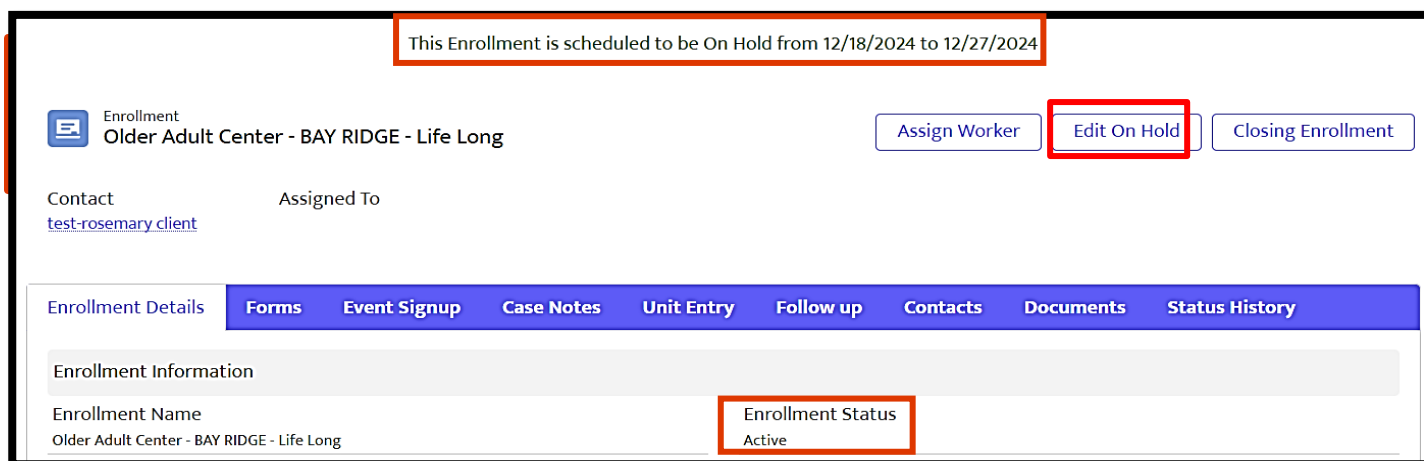
Enrollment Name: Older Adult Center - BAY RIDGE - Life Long
Enrollment Status: Active

Step 1: Select the **On Hold** button. The **On Hold Enrollment** pop-up will display.

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 Details' screen. At the top, a notification bar states 'This Enrollment is scheduled to be On Hold from 12/18/2024 to 12/27/2024'. Below this, the enrollment name is 'Older Adult Center - BAY RIDGE - Life Long'. To the right of the name are three buttons: 'Assign Worker', 'Edit On Hold' (highlighted with a red border), and 'Closing Enrollment'. Below the name, there is a 'Contact' field with the value 'test-rosemary.client' and an 'Assigned To' field. At the bottom, there is a tabbed menu with 'Enrollment Details' selected. Below the menu, there is a table with two columns: 'Enrollment Information' and 'Enrollment Status'. The 'Enrollment Status' column shows the value 'Active'.

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**.

Closing Enrollment

* Closing Date * Closing Code
Select Closing Code

* Closing Reason
type Closing Reason here...

Cancel Save

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)

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 Unit Entry **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.

VIVÉ Knowledge Base – Enrollments

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.*

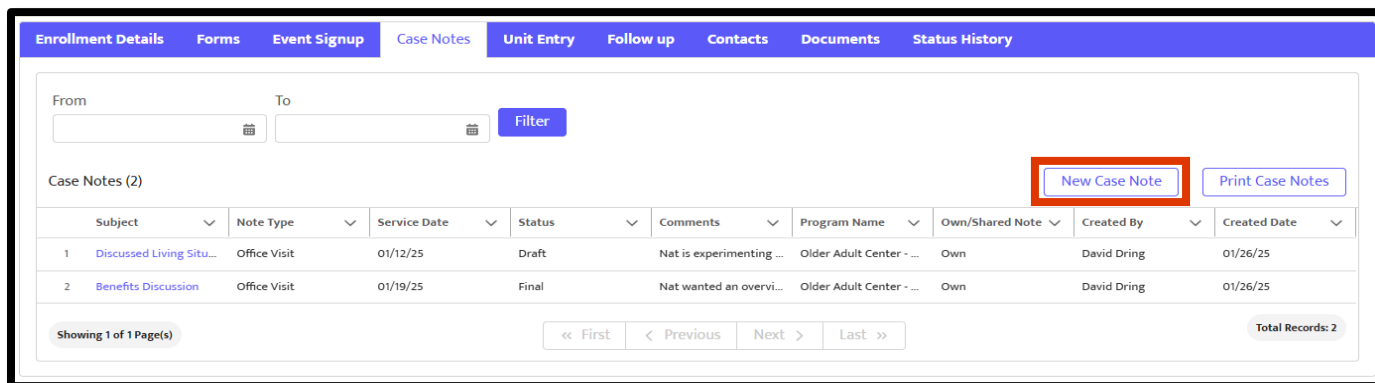
Entering Case Notes

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

VIVÉ Knowledge Base – Case Notes

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

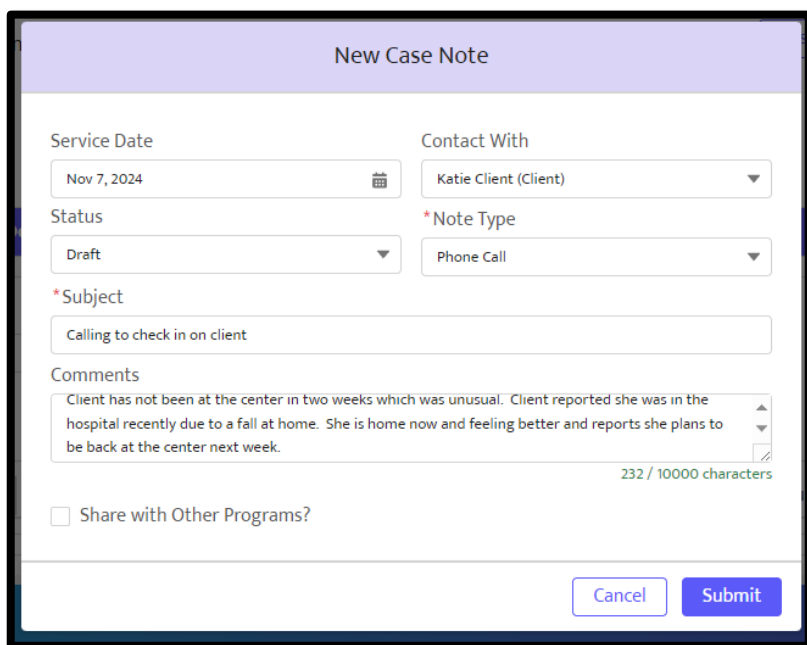
Step 3: From the **Enrollment Details** menu, click on the **Case Notes** tab section and select **New Case Note** button.



The screenshot shows the 'Case Notes' tab in the 'Enrollment Details' menu. At the top, there are tabs for 'Enrollment Details', 'Forms', 'Event Signup', 'Case Notes', '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 includes the following fields: 'Service Date' (calendar icon), 'Contact With' (dropdown menu), 'Status' (dropdown menu), '* Note Type' (dropdown menu), '* Subject' (text input), and 'Comments' (text area). A checkbox for 'Share with Other Programs?' is at the bottom left. 'Cancel' and 'Submit' buttons are at the bottom right. A character count '232 / 10000 characters' is shown at the bottom of the comments area.

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.

VIVÉ Knowledge Base – Case Notes

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**.

The screenshot shows the 'Case Notes' tab in the VIVÉ system. 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 is a search area with 'From' and 'To' date pickers and a 'Filter' button. The main area displays 'Case Notes (2)' with a table. The table has columns: Subject, Note Type, Service Date, Status, Comments, Program Name, Own/Shared Note, Created By, and Created Date. Two case notes are listed. The second note, 'Benefits Discussion', is highlighted with a red box. To the right of the table are buttons for 'New Case Note' and 'Print Case Notes'. At the bottom, there is a pagination bar showing 'Showing 1 of 1 Page(s)' and navigation links: '<< First', '< Previous', 'Next >', and 'Last >>'. A 'Total Records: 2' indicator is also present.

	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

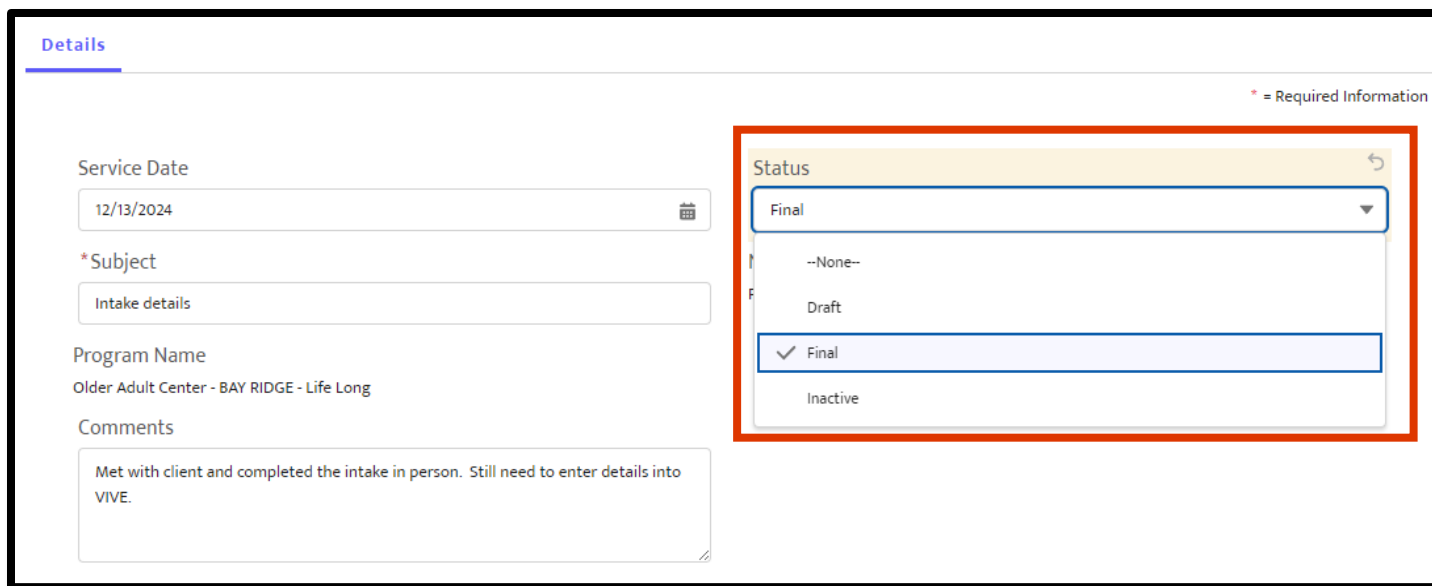
Step 4: Click on the pencils within the **Case Note** details to edit the fields. Once finished select **Save** located at the bottom of the form.

The screenshot shows the 'Details' view of a case note. The form is divided into two columns. The left column contains fields for 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), and Owner (Older Adult Center - BAY RIDGE - Life Lo). The right column contains fields for Status (Draft), Note Type (Phone Call), Share with other programs? (checkbox), and Last Modified By (David Dring). A red box highlights the edit icons (pencils) next to the Service Date, Subject, and Comments fields.

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

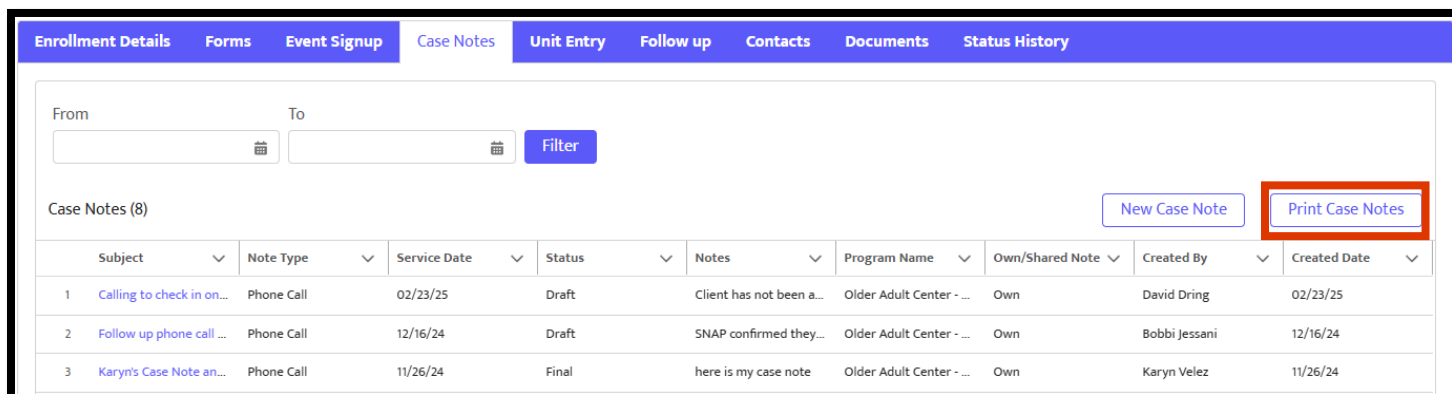
To complete the note taking process, Case Notes must be finalized. The pathway for this process is to access the details of the **Case Notes**. There all the information about the note can be reviewed and the status can be changed to final. Once final, the case note can no longer be edited.



The screenshot shows the 'Details' view of a Case Note. The form includes fields for Service Date (12/13/2024), Subject (Intake details), Program Name (Older Adult Center - BAY RIDGE - Life Long), and Comments (Met with client and completed the intake in person. Still need to enter details into VIVE). A red box highlights the Status dropdown menu, which is currently set to 'Final'. The dropdown options are: --None--, Draft, Final (selected), and Inactive. A legend indicates that an asterisk (*) denotes 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.

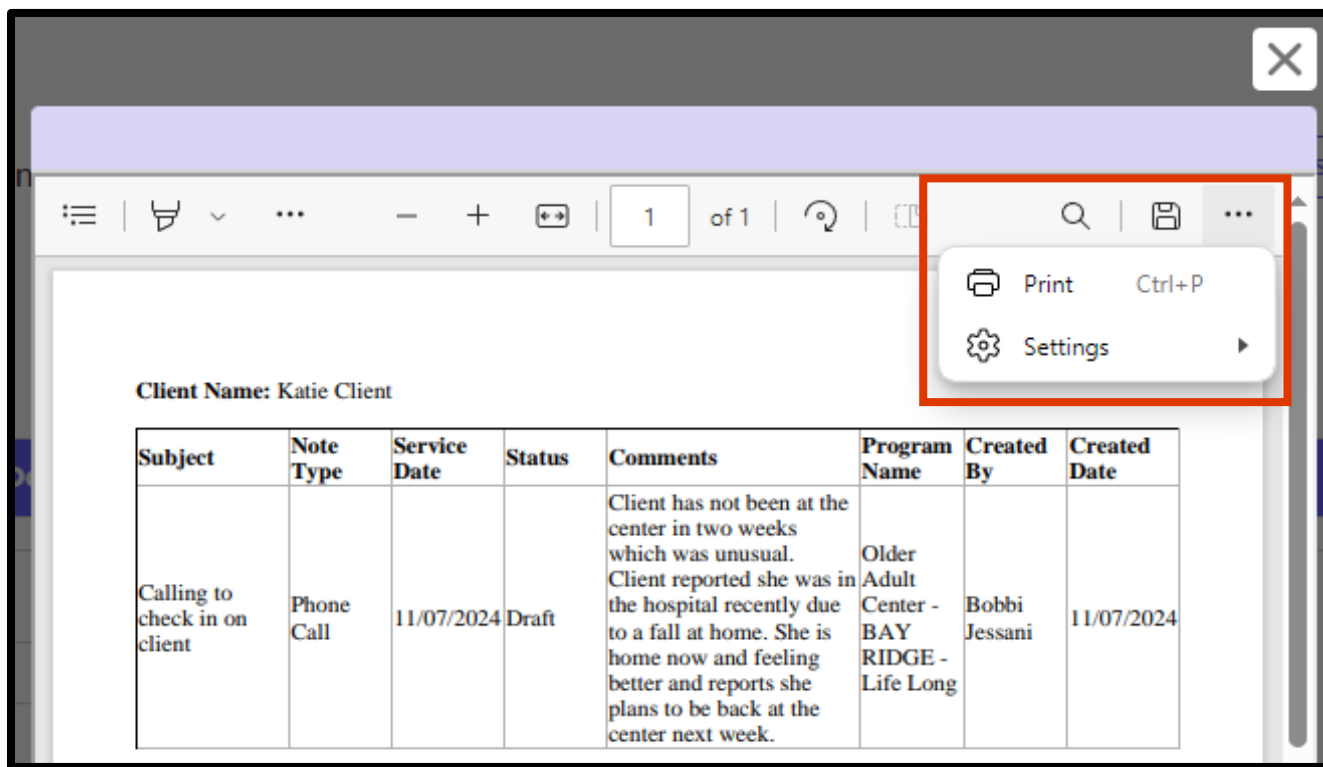


The screenshot shows the 'Case Notes' section of the application. At the top, there are tabs for Enrollment Details, Forms, Event Signup, Case Notes (selected), Unit Entry, Follow up, Contacts, Documents, and Status History. Below the tabs, there are 'From' and 'To' date pickers and a 'Filter' button. The 'Case Notes (8)' section displays a table of case notes. A red box highlights the 'Print Case Notes' button in the top right corner of the table.

	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.

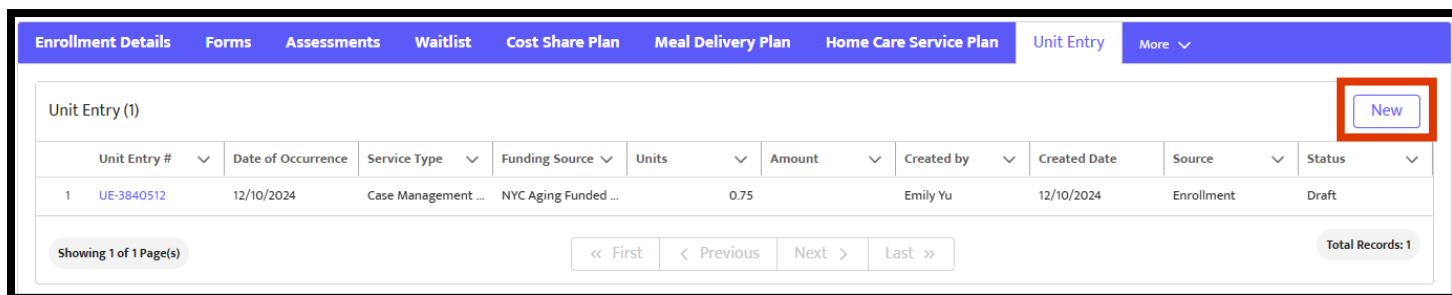


Linking Case Notes to Units

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.



VIVÉ Knowledge Base – Case Notes

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.

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

<input checked="" type="checkbox"/>	Subject	Note Type	Contact Name	Service Date	Status	Created Date	Created Name
<input checked="" type="checkbox"/>	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

99

Last Updated: 6/27/2025

The VIVÉ Follow Up 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, viewing, and assigning **Follow Up**.

Follow Up is a common functionality within VIVÉ that provides the ability for you to either assign to yourself or be assigned by others follow up assistance notifications for clients. 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](#).

- [Follow Up Overview](#)
 - [Create a Follow Up Request](#)
- [Receive a Follow Up Request](#)
- [Edit a Follow Up Request](#)

In this guide you will learn to:

Follow Up Overview

The **Follow Up** task that can be assigned varies in terms of client need. You can create a **Follow Up** request once a client is enrolled. Access the **Follow Up** tab from the **Enrollment Menu**. (For more information on [Enrollment](#).)

Create a Follow Up Request:

Step 1: From the **Details Menu** click on the **Enrollments** tab. Then click on the **Enrollment Name** link to see the **Enrollment Details Menu**.

Enrollments (1)

Enrollment Name	Enrollment Status	Enrollment Date	Program
1 Case Management - RAIN - CMA	In Review	02/05/2025	Case Management - RAIN - CMA

Showing 1 of 1 Page(s) Total Records: 1

Step 2: Click the **Follow Up** tab. This tab displays the follow-ups that are associated with this contact.

Step 3: Click the **New Follow Up Request** button. A pop-up will appear.

Follow up Requests (1)

Subject	Assigned To	Follow-Up Date	Status	Reason	Created Date	Created By ID
1 Benefits and Entitlem...	Karyn Velez	12/06/2024	Open	Clarification on Medi...	12/05/2024	Karyn Velez

Showing 1 of 1 Page(s) Total Records: 1

Step 4: Complete the required fields. You can assign this **Follow Up** request to anyone within your program. The request's due date must be in the future – either regarding date and/or time. The **Reason** field is a space to provide more information than the subject field allows. Select **Submit**.

NOTE: The **Follow Up** request will prompt a notification to the assignee and the details will appear on their **Dashboard**. (For more information on the [Dashboard](#))

Follow-Up Request

*Assigned To
Karyn Velez

Follow-Up Date
*Date
Dec 6, 2024
*Time
1:30 PM

*Subject
Benefits and Entitlements Questions

Reason
Clarification on Medicaid and SCRIE are requested.

Cancel Submit

Receive a Follow Up Request

Follow Up requests will appear on the assignee's **Dashboard** under **My Follow-Ups** for easy access.

VIVÉ Knowledge Base – Follow Up

There will be two links for each row of the **Follow Up** requests. The first link under **Enrollment Name** leads to the client's enrollment details. The second link under **Follow up Request Subject** leads to the details of the **Follow Up** request.

My Follow-Ups			
Enrollment: Enrollment Name ↑	Follow up Request: Subject	Status	Client Name
Case Management - NSHOPP - CMA	Caregiver Information for Daughter	Open	test-sandra client
Case Management - NSHOPP - CMA	test	Inactive	test-peter client
Case Management - NSHOPP - CMA	Benefits and Entitlements Questions	Open	test-maxine client

In addition, a notification prompt will be displayed in the assigned worker's **Notifications**. To view this request, the worker can select the **Bell Icon** on the **Top Menu**. Key information about the **Follow Up** will be included in the notification.

Edit a Follow Up Request

Information details in the **Follow Up** request can be edited prior to the request's **Follow Up** due date or after the request has been completed.

Step 1: Click the **Follow Up** tab on the client's **Enrollment Details Menu**.

Step 2: Click the **Subject** link to access information on the desired request.

Enrollment Details

Contacts

Forms

Assessments

Documents


Event Signup

Unit Entry

Follow up

More ▾

Follow up Requests (1)



[New Follow up Request](#)

Subject ▾	Assigned To ▾	Follow-Up Date	Status ▾	Reason ▾	Created Date	Created By ID ▾
1 Benefits and Entitle...	Karyn Velez	12/06/2024	Open	Clarification on Medi...	12/05/2024	Karyn Velez

Showing 1 of 1 Page(s)

<< First

< Previous

Next >

Last >>

Total Records: 1

Step 3: Click the pencil icons to edit those fields or select the **Edit Assigned To** button to change the assignee.

Follow up Request

Benefits and Entitlements Questions

Edit Assigned To

Follow-Up Date	12/6/2024, 1:30 PM	Client Name	test-maxine client
Assigned To	Karyn Velez	Status	Open
Subject	Benefits and Entitlements Questions	Reason	Clarification on Medicaid and SCRIE are requested.
Enrollment	Case Management - NSHOPP - CMA		
Created By	Karyn Velez	Last Modified By	Karyn Velez

If the status of the **Follow Up** is marked completed, it will be removed from the **Dashboard**. All **Follow Up** requests are listed, with their status, within the client's **Follow Up** section.

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

- [VIVÉ Knowledge Base](#) contains reference guides, short videos and recorded trainings.
- If you have any questions, please contact the [VIVÉ Application Support Center](#) by submitting a ticket through the [Ticketing Module](#) under **Program Tools**.

[Return to VIVÉ Knowledge Base](#)

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.

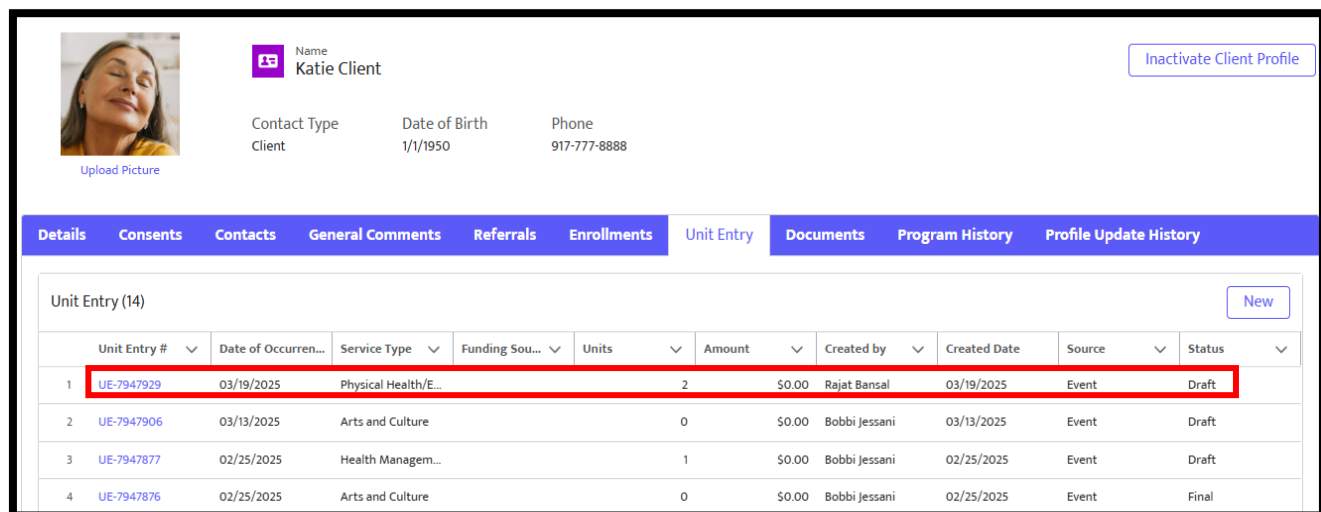
You can enter units in VIVÉ in three places: **Details Menu**, **Enrollment Menu**, or **Program Tools**. For more information on [Events](#).

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.

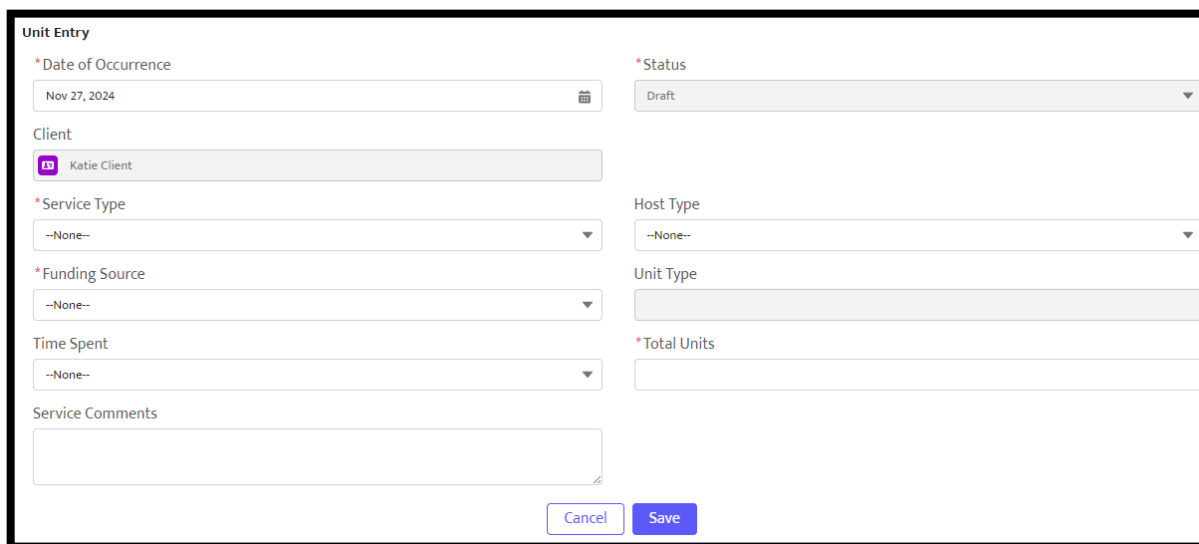
Step 2: From the **Unit Entry** tab. Click on a Unit Entry # link to view details.



Unit Entry (14)

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	02/25/2025	Arts and Culture		0	\$0.00	Bobbi Jessani	02/25/2025	Event	Final

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--

Host Type: --None--

* Funding Source: --None--

Unit Type:

Time Spent: --None--

* Total Units:

Service Comments:

Cancel Save

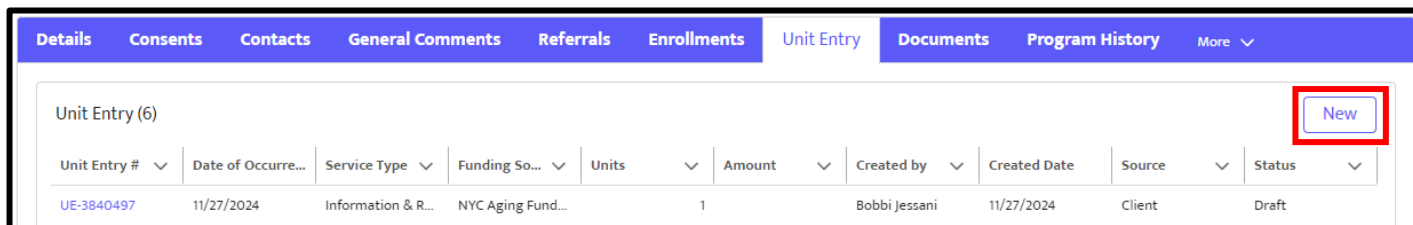
NOTE: Units are in draft status until the Monthly Unit Summary is finalized. More on that below.

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**.

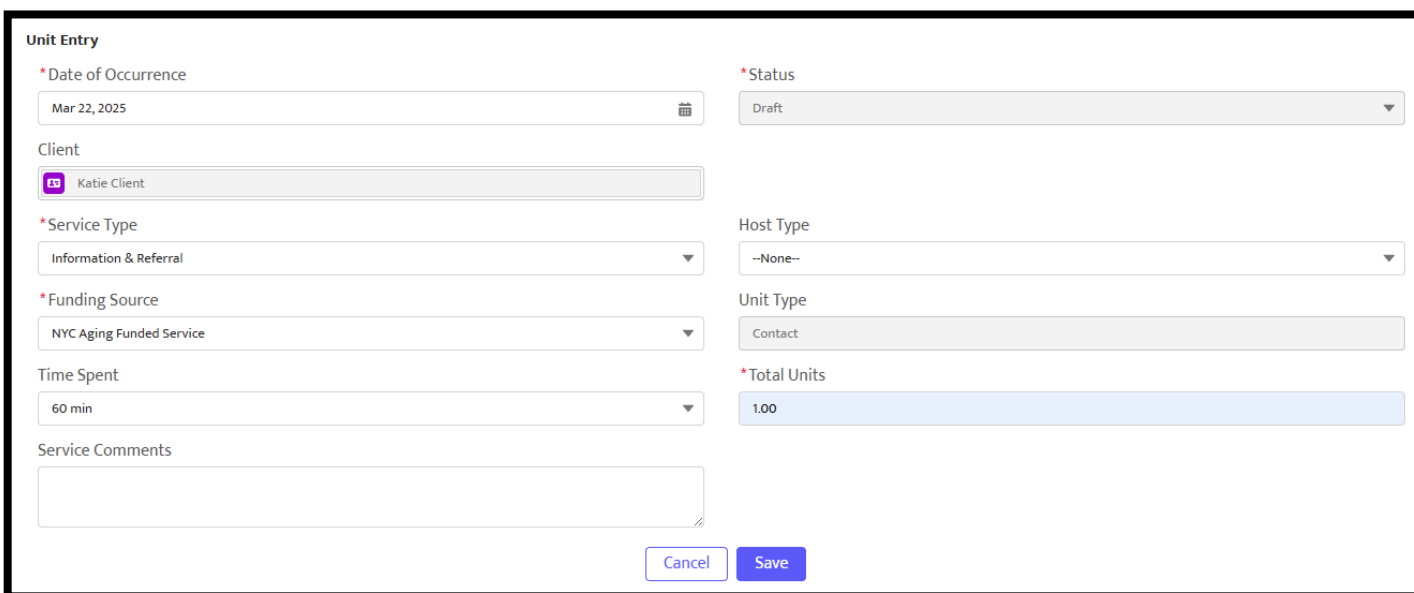
Step 1: From the **Top Menu**, click **Client Search**, and click desired client's name.

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



The screenshot shows a table titled "Unit Entry (6)". The table has columns: Unit Entry #, Date of Occurrence, Service Type, Funding Source, Units, Amount, Created by, Created Date, Source, and Status. A row is visible with values: UE-3840497, 11/27/2024, Information & R..., NYC Aging Fund..., 1, Bobbi Jessani, 11/27/2024, Client, and Draft. A "New" button is highlighted in a red box in the top right corner of the table area.

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



The screenshot shows the "Unit Entry" form. Required fields are marked with a red asterisk (*):

- *Date of Occurrence: Mar 22, 2025
- *Status: Draft
- *Service Type: Information & Referral
- *Funding Source: NYC Aging Funded Service
- *Total Units: 1.00

Other fields include Client (Katie Client), Host Type (--None--), Unit Type (Contact), Time Spent (60 min), and Service Comments. There are "Cancel" and "Save" buttons at the bottom right.

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

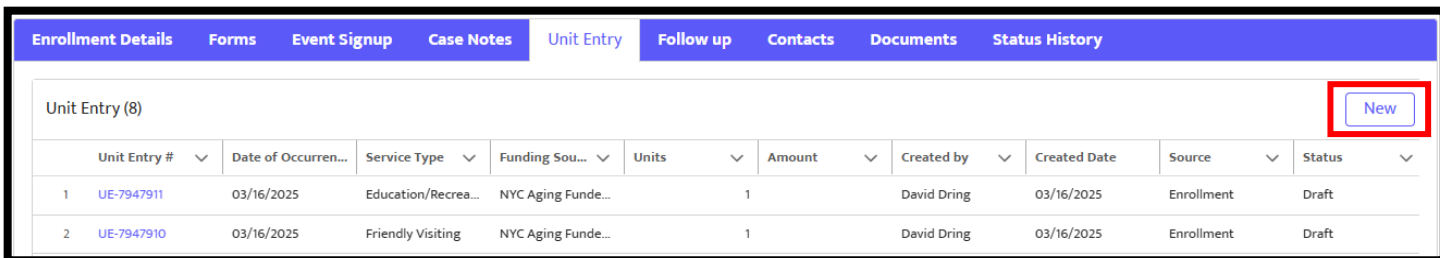
Enrollment units are specific to your programs and services. From the **Enrollment Details Menu** you are entering units specific to your client.

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.



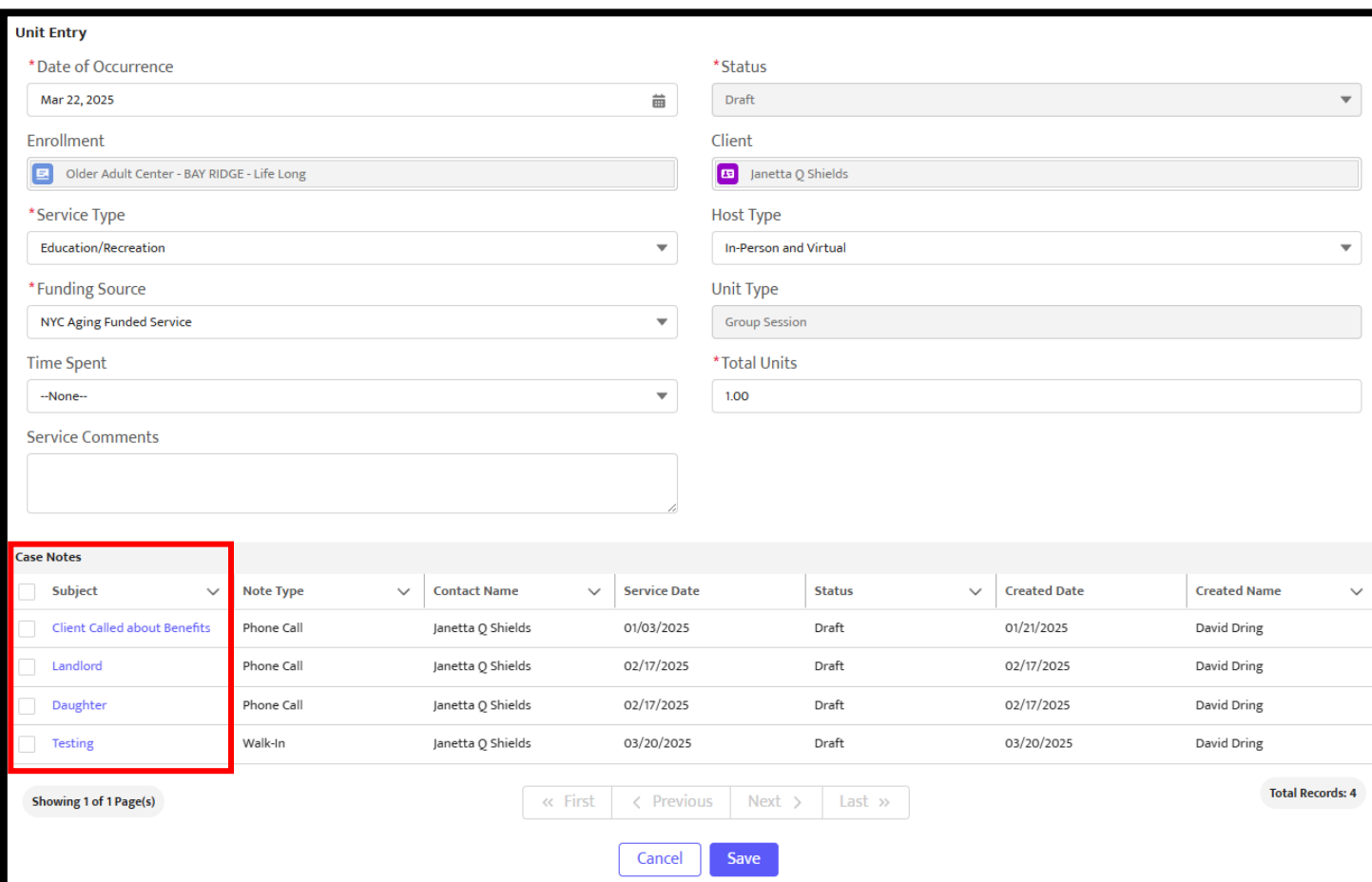
Unit Entry (8)

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 Funded Service	1		David Dring	03/16/2025	Enrollment	Draft
2 UE-7947910	03/16/2025	Friendly Visiting	NYC Aging Funded Service	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	Note Type	Contact Name	Service Date	Status	Created Date	Created Name
<input type="checkbox"/> Client Called about Benefits	Phone Call	Janetta Q Shields	01/03/2025	Draft	01/21/2025	David Dring
<input type="checkbox"/> Landlord	Phone Call	Janetta Q Shields	02/17/2025	Draft	02/17/2025	David Dring
<input type="checkbox"/> Daughter	Phone Call	Janetta Q Shields	02/17/2025	Draft	02/17/2025	David Dring
<input type="checkbox"/> Testing	Walk-In	Janetta Q Shields	03/20/2025	Draft	03/20/2025	David Dring

Showing 1 of 1 Page(s)

« First < Previous Next > Last »

Cancel Save

Total Records: 4

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 Funded Service	1		David Dring	03/16/2025	Enrollment	Draft	
2 UE-7947910	03/16/2025	Friendly Visiting	NYC Aging Funded Service	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. Then select **Save** at the bottom of the page.

Unit Entry

* Date of Occurrence

Mar 16, 2025

* Status

Draft

Enrollment

Older Adult Center - BAY RIDGE - Life Long

* Service Type

Education/Recreation

* Client

Janetta Q Shields

* Funding Source

NYC Aging Funded Service

Host Type

--None--

Time Spent

--None--

Unit Type

Group Session

Service Comments

* Total Units

1.00

Case Notes

<input type="checkbox"/> Subject	Note Type	Contact Name	Service Date	Status	Created Date	Created Name
<input checked="" type="checkbox"/> Entered intake	Other	Janetta Q Shields	12/18/2024	Final	01/21/2025	David Dring
<input type="checkbox"/> Client Called about Benefits	Phone Call	Janetta Q Shields	01/03/2025	Draft	01/21/2025	David Dring

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.

The screenshot shows the VIVÉ Program Tools interface. The top navigation bar includes 'Client Search', 'Referral Queue', 'Program Tools' (highlighted with a red box), 'Admin Tools', and 'Reports'. The user is logged in as Janice Farmer. The main content area shows the 'Event Profile' tab selected. Below the tabs, there is a section for 'Active Event (50)' with a 'New Event Profile' button. A table lists active events with columns: Event Name, Cost Type, Event Type, Unit Type, Event Start Date, and Event End Date. The first row, 'Balance Class FY24', is highlighted with a red box.

	Event Name	Cost 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 Hobbies FY24	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 4: Click the Unit Entry Link from the sub-menu. Select the **New** button.

The screenshot shows the 'Unit Entry' sub-menu. The top navigation bar includes 'Details', 'Event Signup', and 'Unit Entry' (highlighted with a red box). The main content area shows a section for 'Unit Entry (4)' with a 'New' button (highlighted with a red box). Below the button, there is a table listing unit entries with columns: Unit Entry #, Date of Occurrence, Service Type, Total Clients, Total Units, Total \$, Created by, Created Date, Source, and Status.

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

- 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									
Unit Entry (4)									
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.



Cancel Void Unit Save

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**.

NYC Department for the Aging | VIVÉ | Client Search | Referral Queue | **Program Tools** | Admin Tools | Reports | 20+ | David Dring

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](#)
 - [_Toc196819919](#)
 - [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

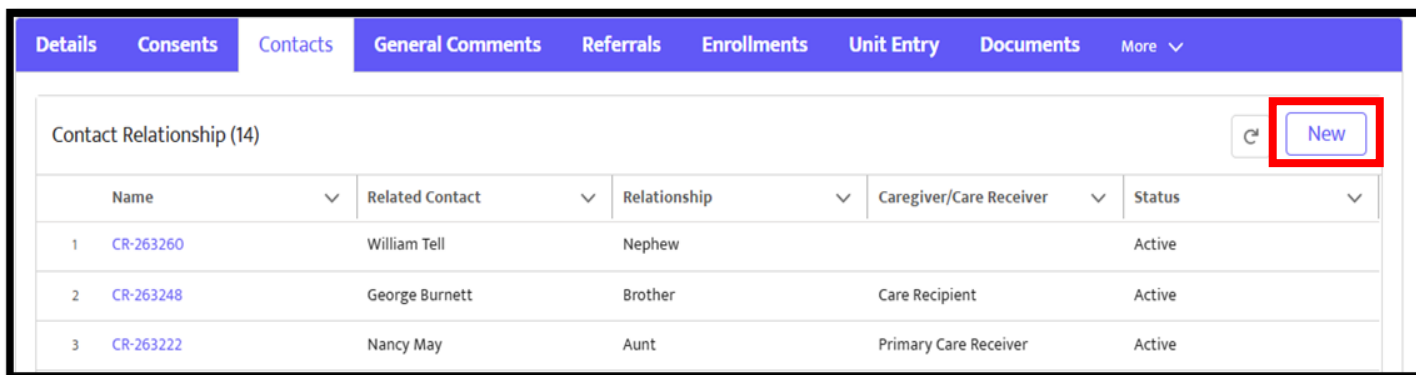
As there are three types of contacts, there are three pathways to associate them with your client. However, each of these pathways start the same way: searching for an existing contact.

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.

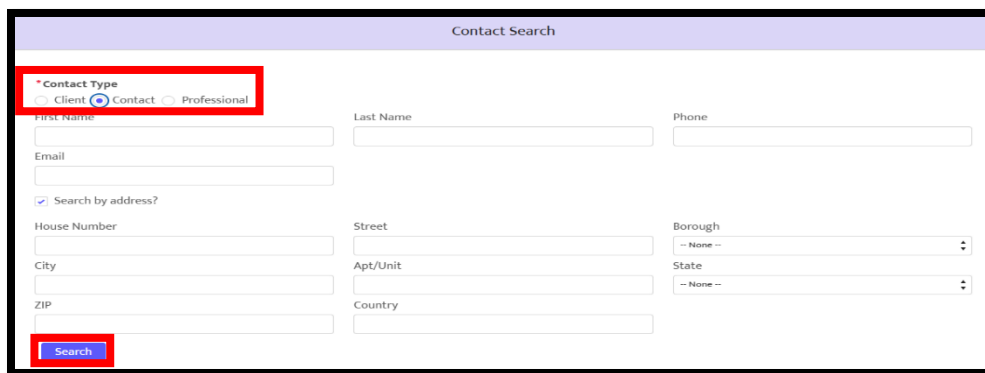


The screenshot shows the 'Contacts' tab selected in the top navigation bar. Below the navigation bar, there is a 'Contact Relationship (14)' section with a 'New' button highlighted in a red box. Below this is a table with columns: Name, Related Contact, Relationship, Caregiver/Care Receiver, and Status. 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.).



The screenshot shows the 'Contact Search' pop-up form. At the top, there are radio buttons for 'Contact Type' with options: 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, ZIP, and Country. A 'Search' button is at the bottom left, highlighted with a red box.

- 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.

VIVÉ Knowledge Base - Contacts

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
<input checked="" type="radio"/> 0999006828	Karen Burnett	Client	05/07/1955				262 61ST STREET, BRO...	
<input type="radio"/> 1501452534	Kari Burnett	Client					, NY	
<input type="radio"/> 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

Contact Relationship to Client

*What is Contact relationship to Client?: --None--

Contact Type: --None--

Care support type: --None--

Emergency Contact: --None--

Client Relationship to Contact

What is Client relationship to Contact?: --None--

Contact Type: --None--

Care support type: --None--

*Status: Active

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

Client Relationship to Professional

*What is Contact relationship to Client?: --None--

Contact Type: --None--

Care support type: --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.

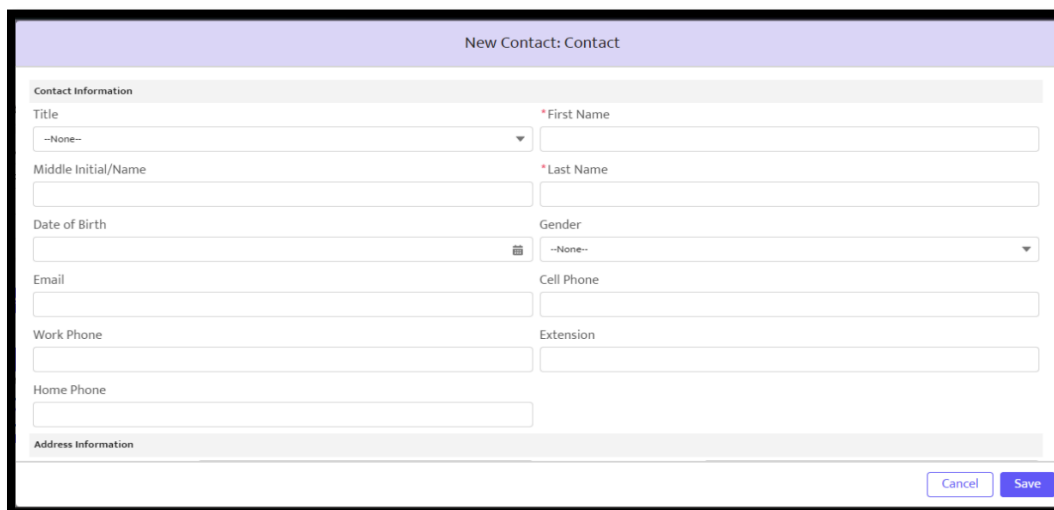
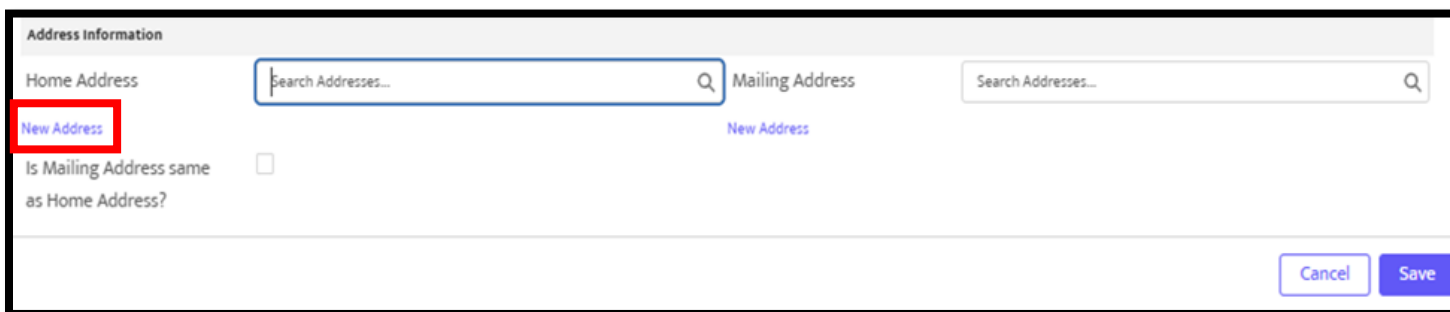
Yes, it can be confusing when talking about a contact type that is contact. We appreciate your understanding.

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**.

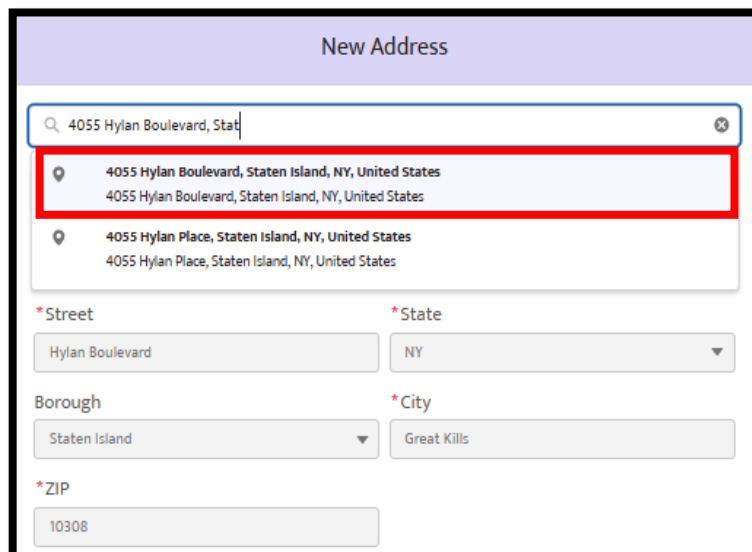
A screenshot of a web form titled "New Contact: Contact". The form is divided into two main sections: "Contact Information" and "Address Information". The "Contact Information" section includes fields for Title (a dropdown menu with "--None--" selected), First Name (marked with a red asterisk), Last Name (marked with a red asterisk), Middle Initial/Name, Date of Birth (with a calendar icon), 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.A screenshot of the "Address Information" section of the form. It features 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, the text "New Address" is highlighted with a red rectangular box. Below the search boxes, there is a checkbox labeled "Is Mailing Address same as Home Address?". At the bottom right are "Cancel" and "Save" buttons.

VIVÉ Knowledge Base - Contacts

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

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

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



New Address

4055 Hylan Boulevard, Stat

4055 Hylan Boulevard, Staten Island, NY, United States
4055 Hylan Boulevard, Staten Island, NY, United States

4055 Hylan Place, Staten Island, NY, United States
4055 Hylan Place, Staten Island, NY, United States

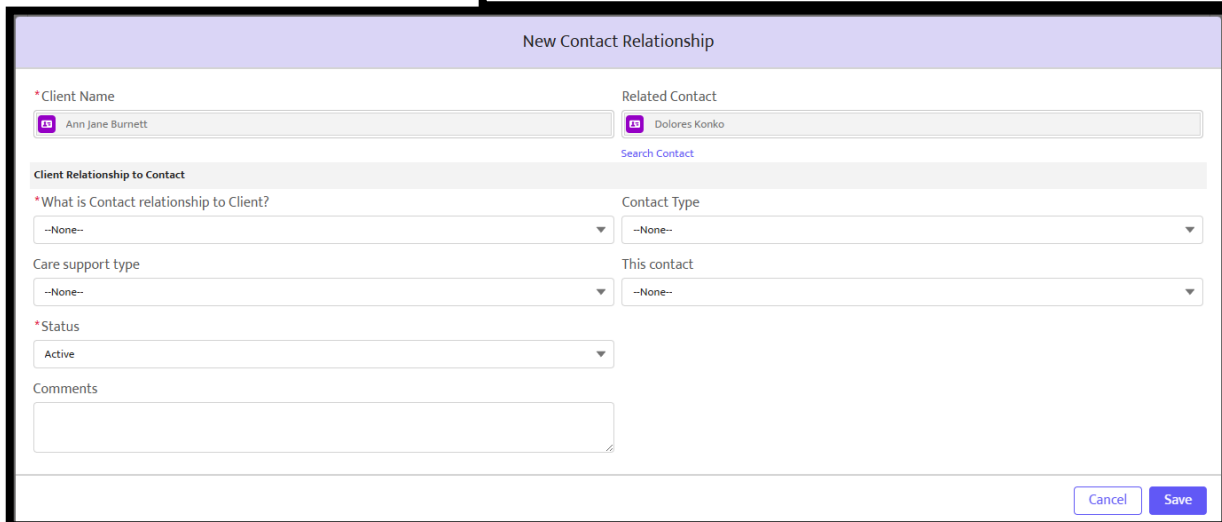
*Street
Hylan Boulevard

*State
NY

Borough
Staten Island

*City
Great Kills

*ZIP
10308



New Contact Relationship

*Client Name
Ann Jane Burnett

Related Contact
Dolores Konkko

Search Contact

Client Relationship to Contact

*What is Contact relationship to Client?
--None--

Contact Type
--None--

Care support type
--None--

This contact
--None--

*Status
Active

Comments

Cancel Save

Entering a New Professional Contact

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

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

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

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

New Contact: Professional

Professional Information

Title --None-- First Name *

Middle Initial/Name Last Name *

Position Organization

Search Organizations...

New Organization | Populate Organization Details

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

Walgreens - Tarrytown

New Organization | Populate Organization Details

Enter a New Organization

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

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

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

Status

Active

Related Contact

[Ginger Whitaker](#)

Contact Type

Primary Care Physician

This contact

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:

- 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.

VIVÉ Knowledge Base - Contacts

- 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 shows the 'Contact Details' form in the VIVÉ system. The 'Status' field is highlighted with a red box. The form is organized into two columns. The left column contains fields for Name, Client Name, Relationship, Care support type, Comments, and Created By. The right column contains fields for Status, Related Contact, Contact Type, This contact, and Last Modified By. Each field has a pencil icon next to it, indicating it can be edited. The 'Status' field is currently set to 'Active'. The 'Created By' and 'Last Modified By' fields show the user 'Nancy Nybergh' and the timestamp '2/3/2025, 10:31 AM'. An 'Exit' button is located at the bottom center of the form.

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

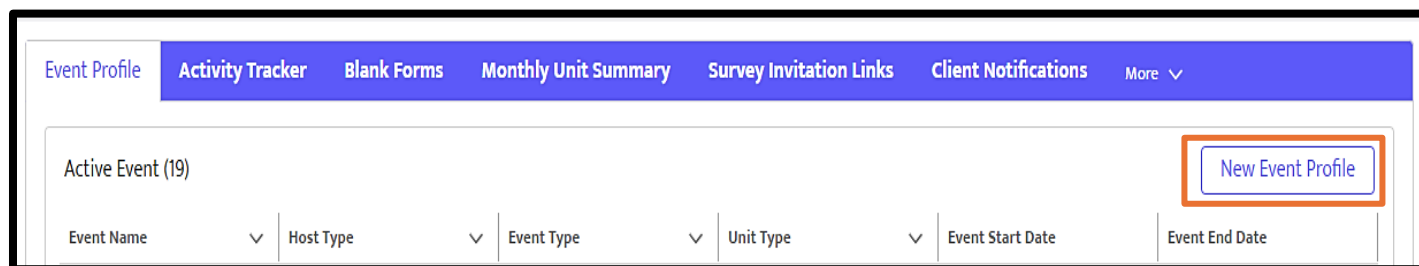
This guide provides navigational and functional instructions. For assistance with program operations or policy, please refer to your program officer or view [NYC Aging's Programs' Standards](#).

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](#)
 - [Entering Meals Provided for Other Eligible Seniors, Ineligible Meals and Eligible Volunteers](#)
- [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.



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 and options:

- * Start Date:** Text input with 'Mar 3, 2025' and a calendar icon.
- 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 'Search Addresses...' and a magnifying glass icon.
- * Unit Type:** Dropdown menu with '--None--' selected.
- Event Capacity:** Text input.
- Fee Amount:** Text input.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

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.

The screenshot shows the VIVÉ Program Tools menu. The 'Program Tools' tab is highlighted in the top navigation bar. Below it, the 'Event Profile' tab is selected. A table lists active events with columns for Event Name, Host Type, Event Type, Unit Type, Event Start Date, and Event End Date. The first event, 'Balance Class FY24', is highlighted with a red box.

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

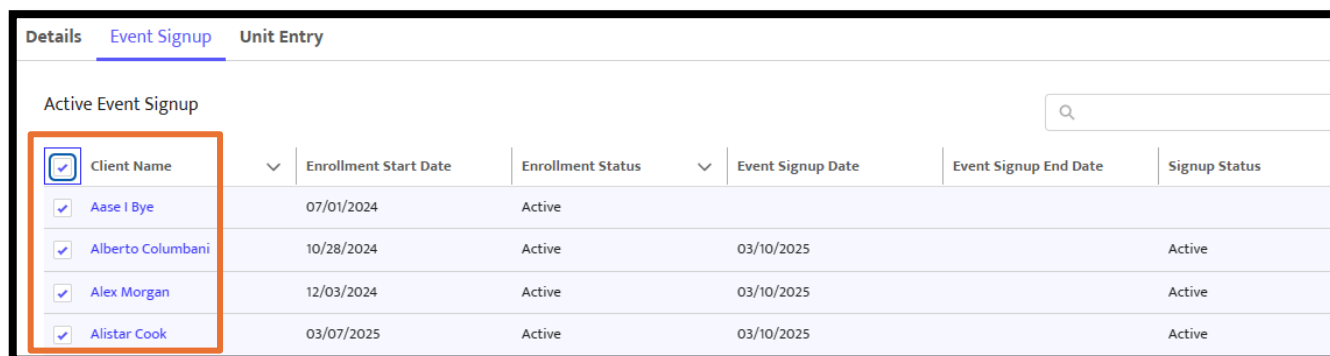
Step 3: Click **Event Signup**.

The screenshot shows the Event Profile page for 'Balance Class FY24'. The 'Event Signup' tab is selected. Below it, a table lists active event signups with columns for Client Name, Enrollment Start Date, Enrollment Status, Event Signup Date, Event Signup End Date, and Signup Status. The 'Event Signup' tab is highlighted with a red box.

Client Name	Enrollment Start Date	Enrollment Status	Event Signup Date	Event Signup End Date	Signup Status
Alberto Columbari	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.



Client Name	Enrollment Start Date	Enrollment Status	Event Signup Date	Event Signup End Date	Signup Status
<input checked="" type="checkbox"/> Aase I Bye	07/01/2024	Active			
<input checked="" type="checkbox"/> Alberto Columbani	10/28/2024	Active	03/10/2025		Active
<input checked="" type="checkbox"/> Alex Morgan	12/03/2024	Active	03/10/2025		Active
<input checked="" type="checkbox"/> 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.

Event Name	Host Type	Event Type	Unit Type	Event Start Date	Event End Date	Event Signup Date	Event Signup End Date	Signup Status
Active Exercises FY24	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 FY24	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**.

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

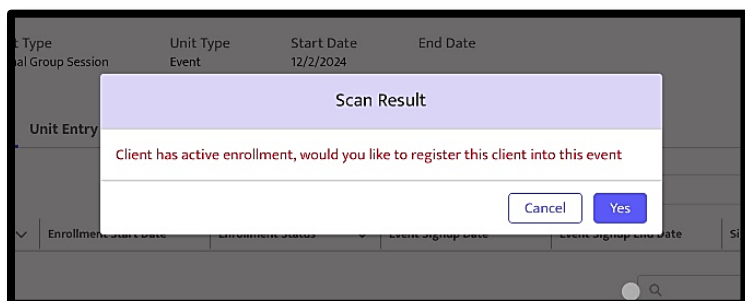
Step 3: Click **Event Signup** link. Then select **Scan QR Code** button. ([More information on QR Code Scanning](#))

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	

VIVÉ Knowledge Base – Events

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:

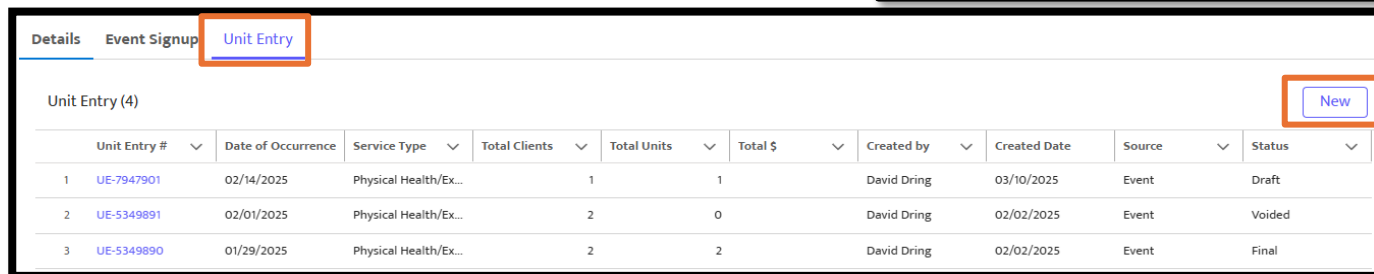
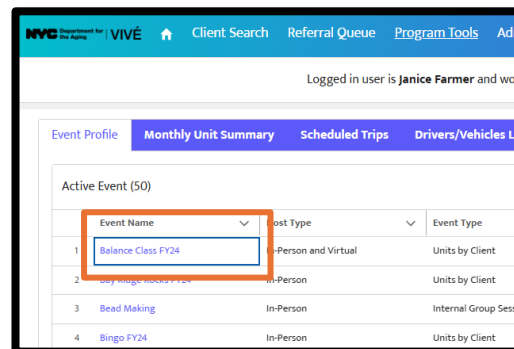
- Entering units from the **Events Profile** (good for entering units quickly for multiple clients).
- Entering a unit for a client from the **Enrollment Details** Menu.
- By using the **Scan QR Code** feature (most accurate way to enter units).

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.

- 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.

Unit Entry

Event Details

Event Profile: Balance Class FY24

Event Location: [Empty]

Fee Amount: \$0.00

Event Type: Units by Client

Unit Type: Participant

Event Manager: [Empty]

Unit Entry Details

* Date of Occurrence: Mar 10, 2025

* Status: Draft

Total Units: 2.00

Total \$: 0.00

Filter & Auto Fill

Name: [Empty] Filter

Funding Source: --None--

Units: 0

Amount: 0

Auto Fill

Select all Attended? ☐

Scan QR Code

Client List

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

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.

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

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 #	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? ☐

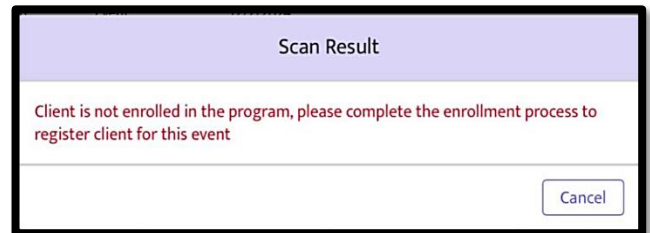
Step 6: A windowpane appears showing the image from the back facing camera. Maneuver the camera so that the member's ID card is clearly within the windowpane.



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.



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

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.

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.

Unit Entry	
Event Details	
Event Profile Congregate Meal Spring	Event Type Congregate
Event Location 15 BAY RIDGE AVENUE, BROOKLYN, NY 11209	Unit Type Meal
Fee Amount	Event Manager
Unit Entry Details	
* Date of Occurrence Mar 16, 2025	* Status Draft
Total Units	Total \$
Meals Ordered	Meals Received
Anonymous Units	

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

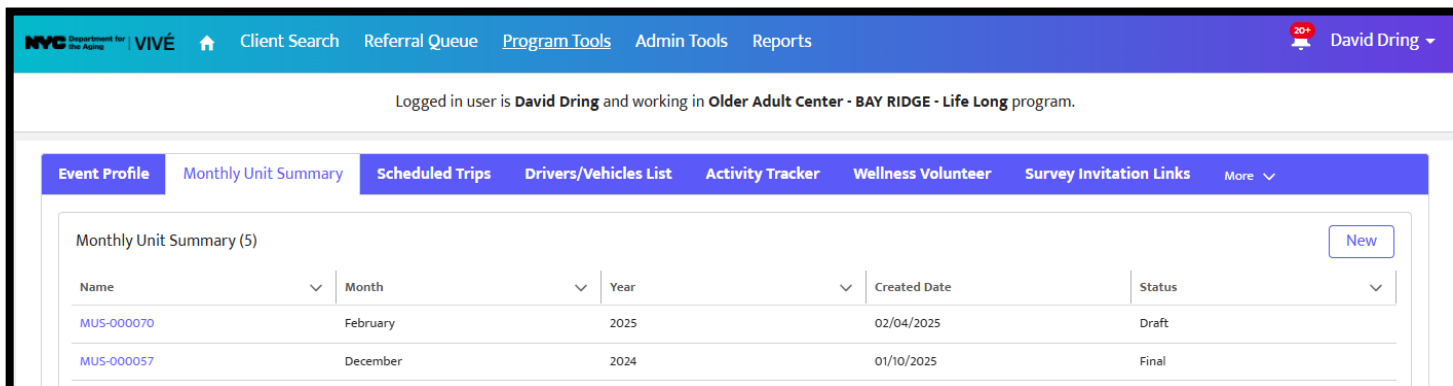
Eligible Meals	
Eligible Funding --None--	Eligible Volunteers regardless of Age
Other Eligible Seniors ⓘ	Total Eligible ⓘ
Ineligible Meals	
Ineligible Funding --None--	Staff Under 60
Guests Under 60	Total Ineligible ⓘ

Keeping Track of Other Types of Meals Provided: When entering units for a congregate 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

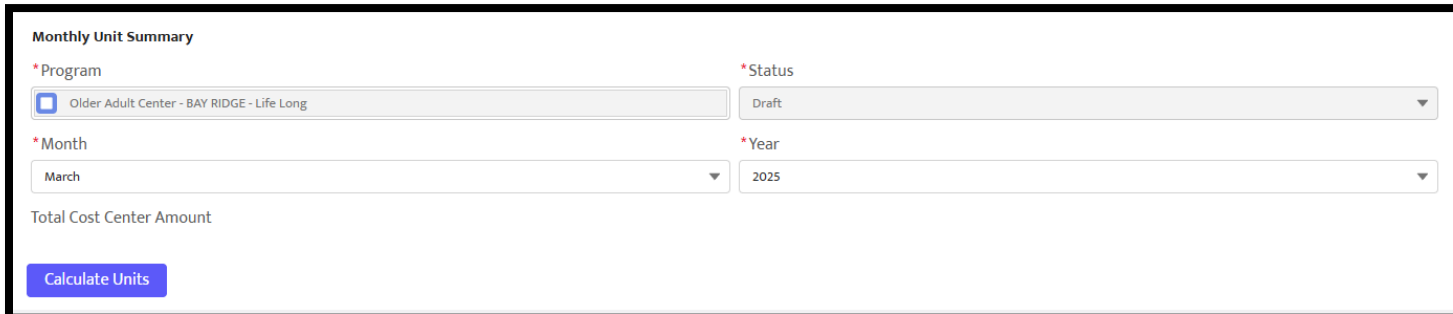
The Monthly Unit Summary summarizes units recorded by service type in a month. Once you have confirmed these amounts, you must finalize the report. **Once a report is finalized, units can no longer be entered or edited. If you need to unlock the Monthly Unit Summary, contact your program officer.**

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:

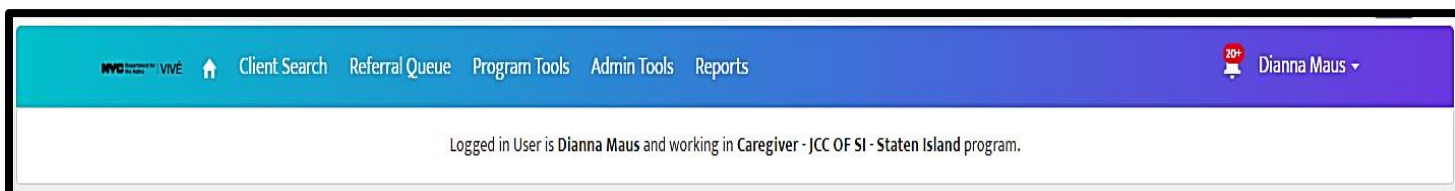
- [Overview of Referrals](#)
- [Viewing Referrals](#)
- [Referral Details](#)
 - [Accepting an Enrollment](#)
 - [Rejecting an Enrollment](#)
 - [Cancelling a Referral](#)
 - [Referral Notes](#)
- [Making a Referral](#)
 - [Completing Consent to Refer](#)

Overview of Referrals

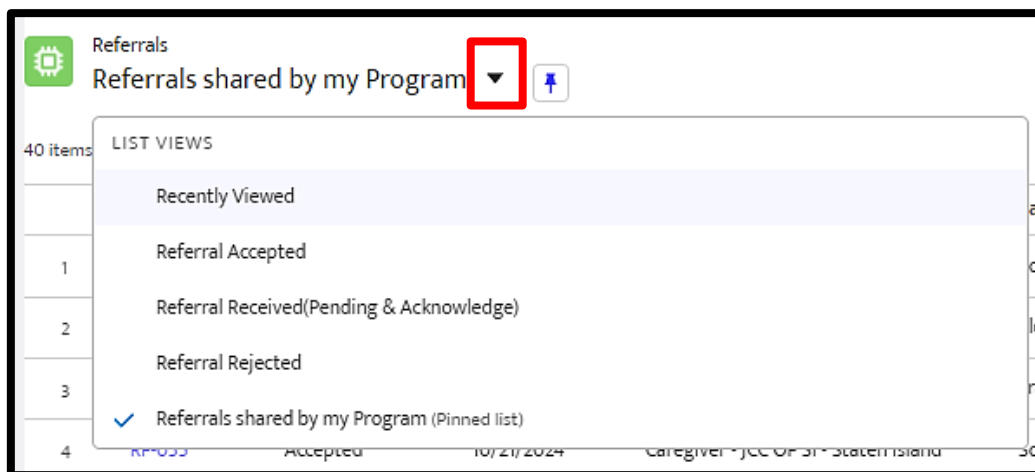
The **Referral Queue** enables users to view and manage referrals. Users are able to refer a client from one NYC Aging program to another. Each program has different places (targets) that they can refer a client. Referrals can be in various states: sent, pending, acknowledged (reviewed by the target 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 ...	Referral St...	Referral Date	Source Program	Target Program	External Age...	Contact
1 RF-044	Referral Sent	10/21/2024	Caregiver - JCC OF SI - Staten Island		NYC Connect	Henry Farber
2 RF-095	Referral Sent	10/25/2024	Caregiver - JCC OF SI - Staten Island	Case Management - CASC - CMA		Dorothy Buscemi

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.

VIVÉ Knowledge Base – 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

AcknowledgeAcceptReject

Referral DetailsNotes

Referral Information

Referral Name
RF-84483

Referral Date
3/13/2025

Source Program
Elder Justice - NSHOPP - Bronx North

Is for external agency?
☐

Referral Comments

Referral Status
Referral Sent

Contact
[Bill Cipher](#)

Target Program
Older Adult Center - BAY RIDGE - Life Long

External Agency Name

Services Requested

Friendly Visiting

System Information

Created By
Eva Amigon

Created Date
3/13/2025, 9:27 AM

Last Modified By
Eva Amigon

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

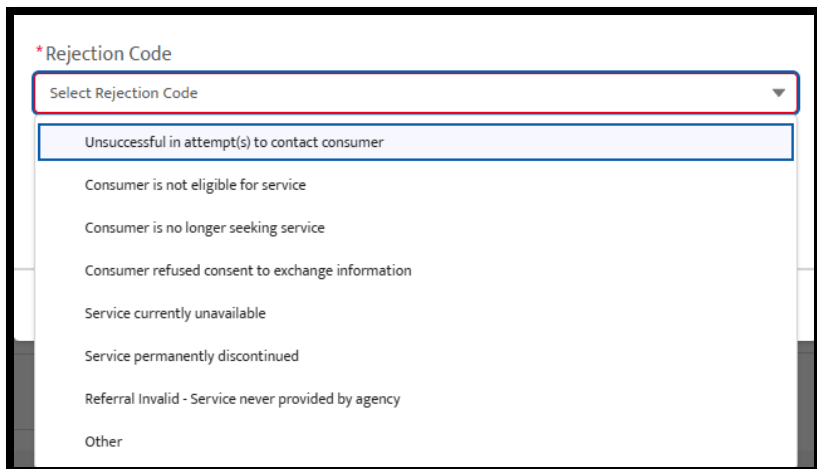
Go to Enrollment

Referral DetailsNotes

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 titled "*Rejection Code". It features a dropdown menu with the placeholder text "Select Rejection Code". The dropdown is open, showing a list of rejection codes: "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", and "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 a header with a green gear icon and the text "Referral RF-248". On the right side of the header, there is a red-bordered button labeled "Cancel Referral". Below the header, there are two tabs: "Referral Details" (which is active) and "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.



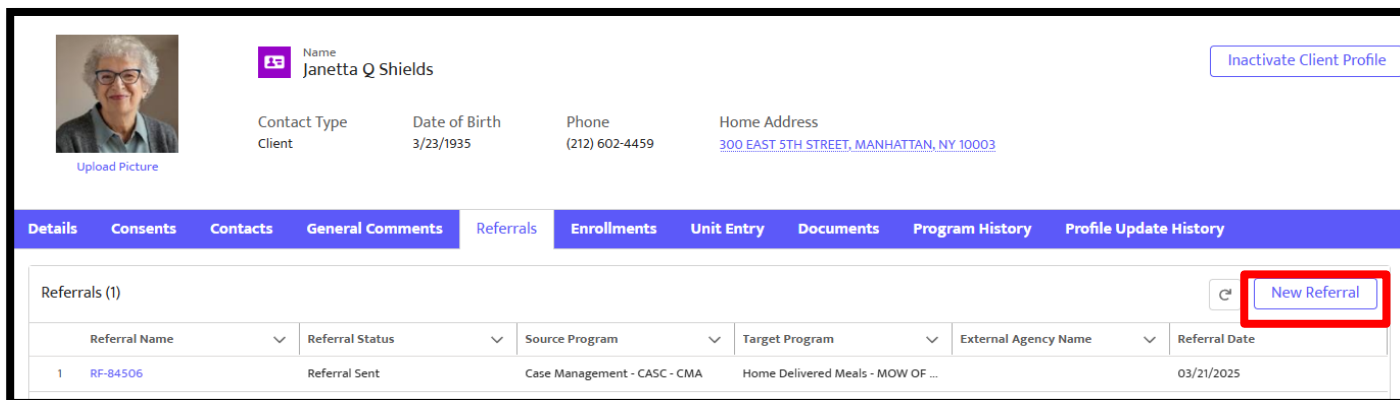
A screenshot of the "Referral RF-044" page, specifically the "Notes" tab. The page has a header with a green gear icon and the text "Referral RF-044". Below the header, there are two tabs: "Referral Details" and "Notes" (which is active and highlighted with a red border). Below the tabs, there is a search and filter section with "From" and "To" date pickers, a "Filter" button, and a "Notes (0)" label. At the bottom, there is a table with columns: "Event Date", "Subject", "Comments", "Created By", "Last Modified By", and "Program Name". There are also "New Note" and "Print Notes" buttons.

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.



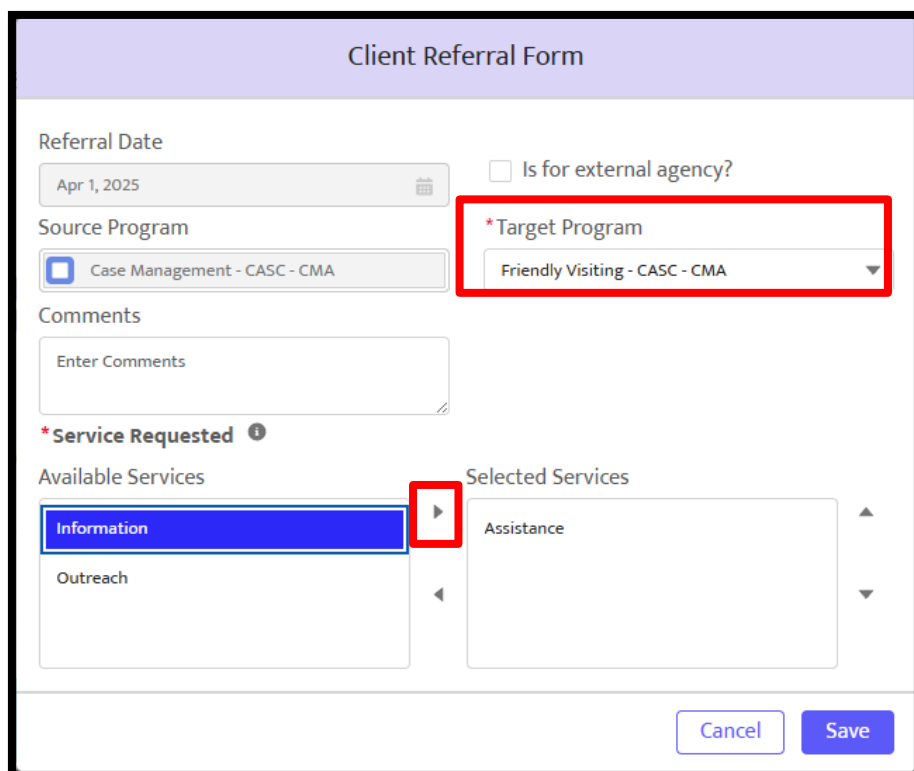
The screenshot shows the client profile for Janet Q Shields. The 'Referrals' tab is active. A table lists one referral with ID RF-84506. A 'New Referral' button is highlighted with a red box.

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

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**.



The screenshot shows the 'Client Referral Form'. The 'Target Program' dropdown is highlighted with a red box. The 'Information' service is selected in the 'Available Services' list, and the 'Assistance' service is shown in the 'Selected Services' list.

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 'Client Referral Form' interface. At the top, a red error banner states: '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), 'Target Program' (Friendly Visiting - CASC - CMA), and a 'Comments' section. Under the '*Service Requested' section, 'Available Services' lists 'Information' and 'Outreach', while 'Selected Services' lists 'Assistance'. At the bottom right, 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

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- 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](#).

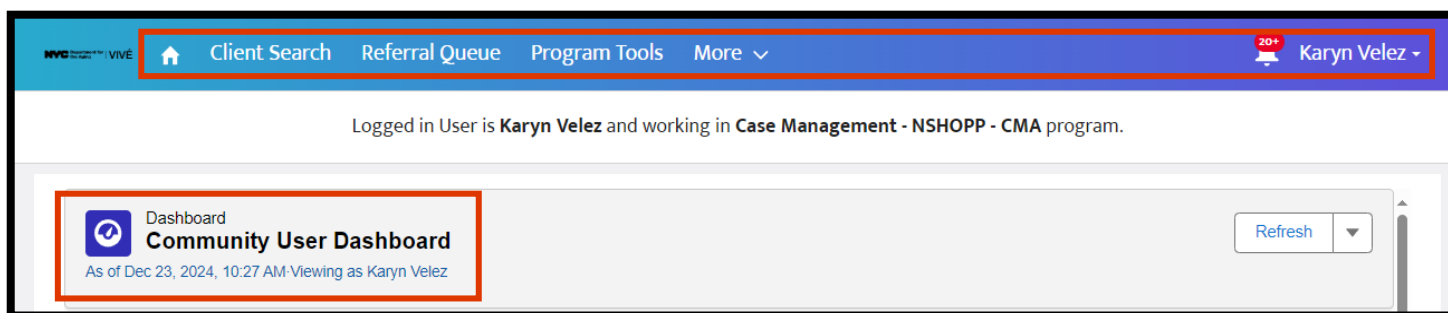
In this guide you will learn:

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.

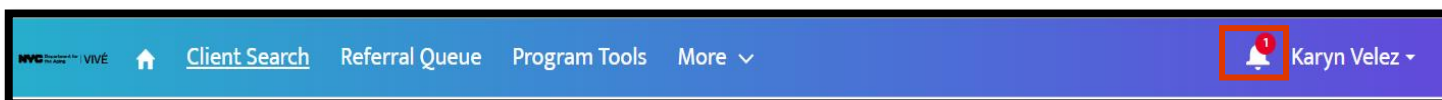


These are the critical links from the **Top Menu**:

- **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.



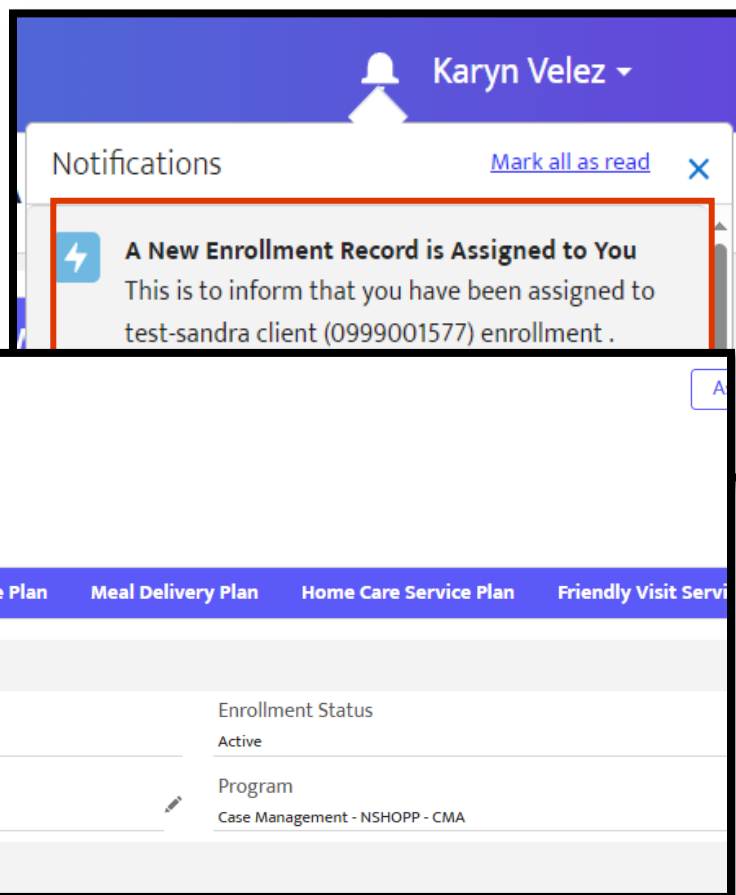
To view and access **Notifications**:

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.

VIVÉ Knowledge Base – Dashboard

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.

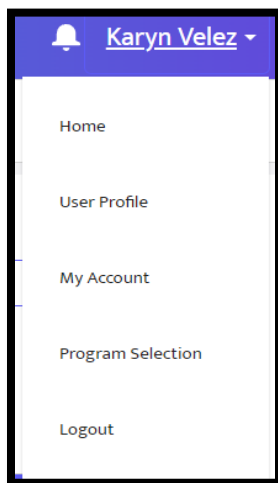


Notifications are ordered so that the most recent one appears at the top of the list. If you want to view others, scroll down.

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:



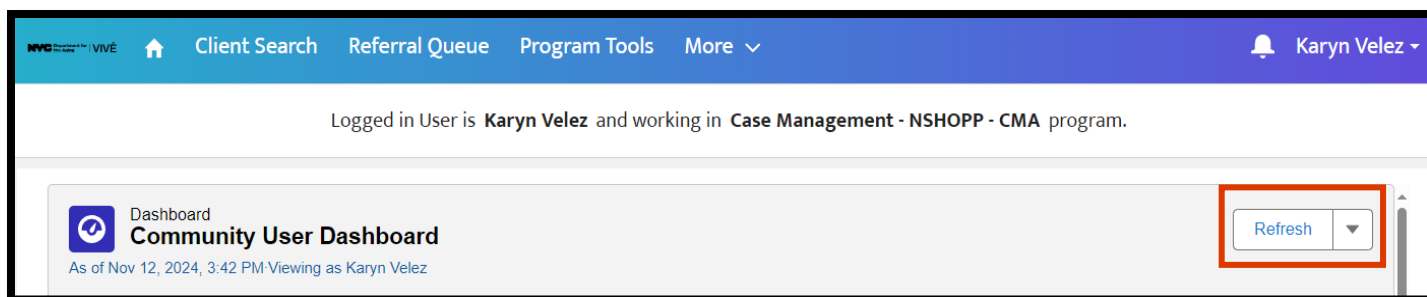
- **Home** – This functionality is used to bring you back to the Dashboard from any screen page in VIVÉ.
- **User Profile** – This functionality provides access to information about you including your 1) title, 2) supervisor's name, 3) email address, 4) company name, telephone number and address and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

Inactivate Client Profile

Upload Picture

ID

Status

Contact Type

0999001577

Active

Client

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

Task Status

Open

Priority

Normal

Did you Speak with the client ?

Created Date

12/18/2024, 1:11 PM

Last Modified By

Tej Kum

Subject

Client Re-assessment

Assessment

[AS-00072](#)

Actions

Program

Case Management - NSHOPP - CMA

Last Modified Date

12/18/2024, 1:11 PM

Exit

VIVÉ Knowledge Base – Dashboard

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

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.

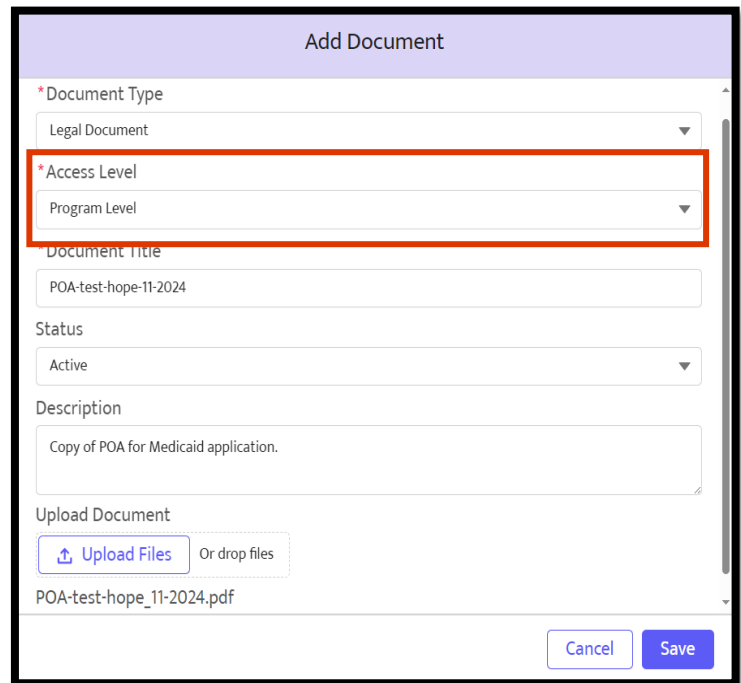
Step 3: Select the **Add Document** button to bring up a pop-up to enter document details.

Document Type	Document Title	Access Level	Uploaded By	Status	Uploaded Date	Program Name	
1	Consent to Collect Data	Consent to Collect Info Sign...	Program Level	David Dring	Active	Mar 31, 2025	Case Management - NSHOP...

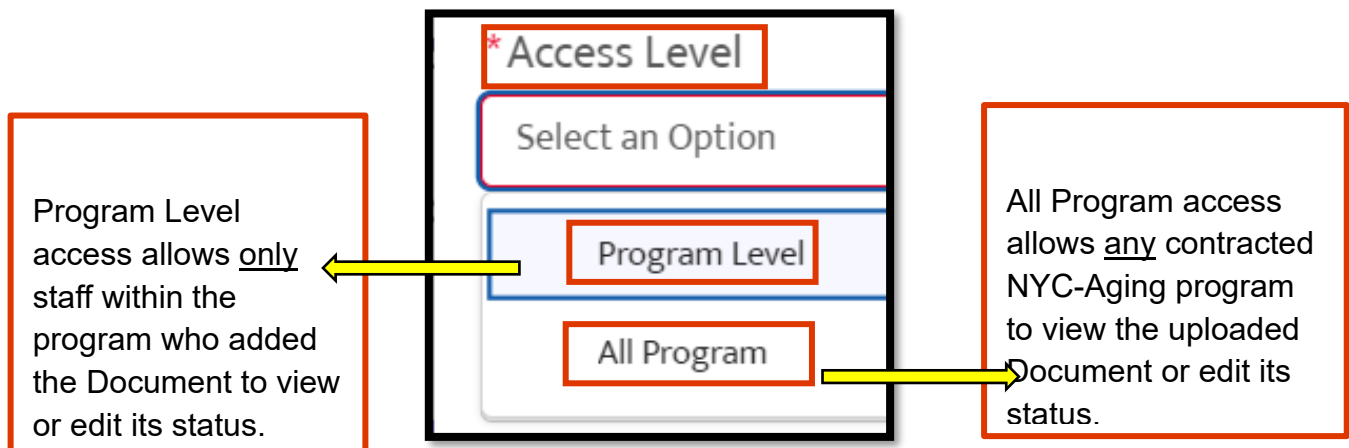
Step 4: On the **Add Document** pop-up, complete the required fields of **Document Type**, **Access Level** and **Document Title**. The **Status** field will automatically default to the status of **Active**. If needed, provide a **Description** of the documentation.

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.

TIP: Keeping various client documentation in one central location can be helpful when the need to 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.

Details

Consents

Contacts

General Comments

Referrals

Enrollments

Unit Entry

Documents

Program History

Profile Update History

Documents (2)

Add Document

	Document Type	Document Title	Access Level	Uploaded By	Status	Uploaded Date	Program Name	
1	Consent to Collect Data	Consent to Collect Info Si...	Program Level	David Dring	Active	Feb 23, 2025	Case Management	Edit Status
2	Client ID	Test.jpg	All Program	Sonia Torres Community	Active	Jan 31, 2025	Case Management	Download

Edit Document Status

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

VIVÉ Knowledge Base - Documents

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.

Details Consents Contacts General Comments Referrals Enrollments Unit Entry Documents Program History Profile Update History							
Documents (2)							
	Document Type	Document Title	Access Level	Uploaded By	Status	Uploaded Date	Program Name
1	Consent to Collect Data	Consent to Collect Info Si...	Program Level	David Dring	Active	Feb 23, 2025	Case Manager
2	Client ID	Test.jpg	All Program	Sonia Torres Community	Active	Jan 31, 2025	Case Manager

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

Edit Document Status

Status

Inactive

Cancel

Save

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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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 administering 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:

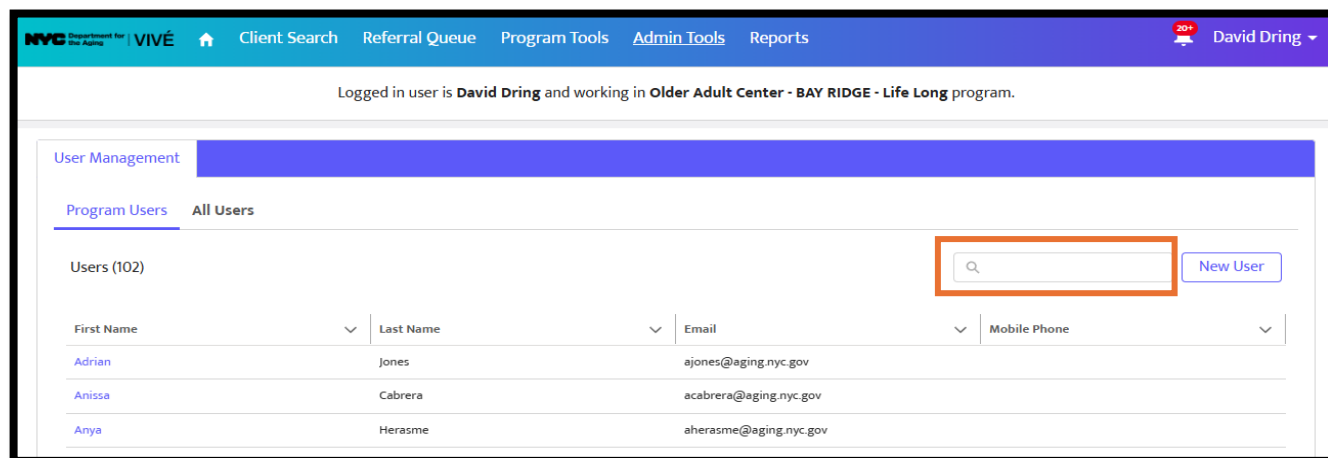
- [Accessing Admin Tools](#)
- [Viewing Users](#)
 - [Searching for Users](#)
- [Creating a New User](#)
- [Editing a User](#)
 - [Editing Basic Information](#)
 - [Editing User Roles with Program Associations](#)
- [Inactivating a User from a Program Association](#)

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.



NYC Department for the Aging | VIVÉ

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

20+ David Dring

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

User Management

Program Users **All Users**

Users (102)

Search [] New User

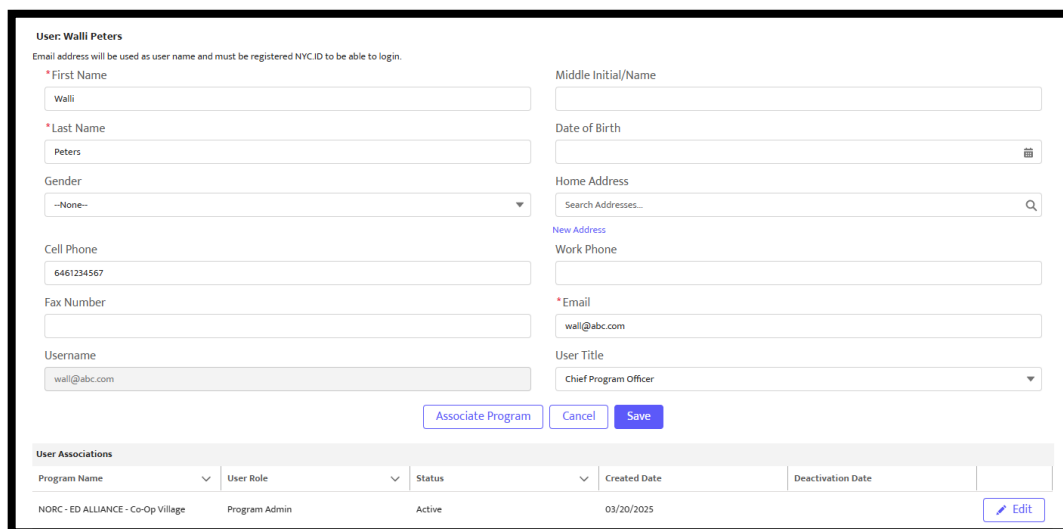
First Name	Last Name	Email	Mobile Phone
Adrian	Jones	ajones@aging.nyc.gov	
Anissa	Cabrera	acabrera@aging.nyc.gov	
Anya	Herasme	aherasme@aging.nyc.gov	

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.



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: wall@abc.com

Middle Initial/Name:

Date of Birth:

Home Address: Search Addresses...

New Address

Work Phone:

* Email: wall@abc.com

User Title: Chief Program Officer

Associate Program Cancel Save

User Associations

Program Name	User Role	Status	Created Date	Deactivation Date
NORC - ED ALLIANCE - Co-Op Village	Program Admin	Active	03/20/2025	

Edit

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.

Program Name	User Role	Status	Created Date	Deactivation Date
NORC - ED ALLIANCE - Co-Op Village	Program Admin	Active	03/20/2025	

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.

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

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

Program
Older Adult Center - BAY RIDGE - Life Long

User Role
Program Staff

Status
Active

Cancel Save

Inactivating a User from a Program Association

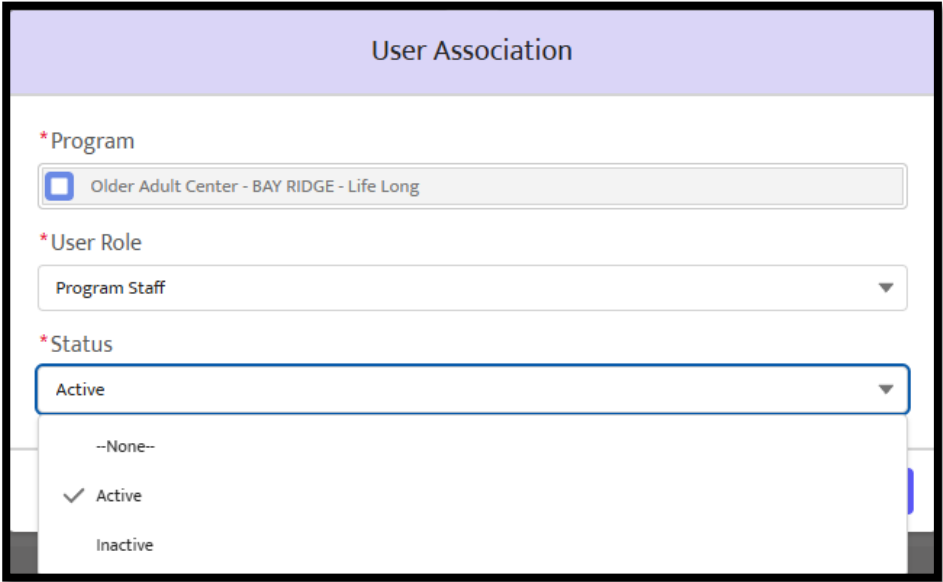
While users are never deleted from the system, they are inactivated from a program. In this way, they can be reactivated with another program later.

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 displays the 'User Association' form. It features three main sections: '* Program' with a text input field containing 'Older Adult Center - BAY RIDGE - Life Long'; '* User Role' with a dropdown menu set to 'Program Staff'; and '* Status' with a dropdown menu currently set to 'Active'. The 'Status' dropdown is open, showing three options: '--None--', 'Active' (which has a checkmark next to it), and 'Inactive'.

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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