VIVÉ REFERENCE GUIDE

CASE MANAGEMENT

NYC Department for the Aging

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.

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 of view NYC Aging's Program's Standards.

In this guide you will learn:

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

VIVÉ: Flow Diagrams

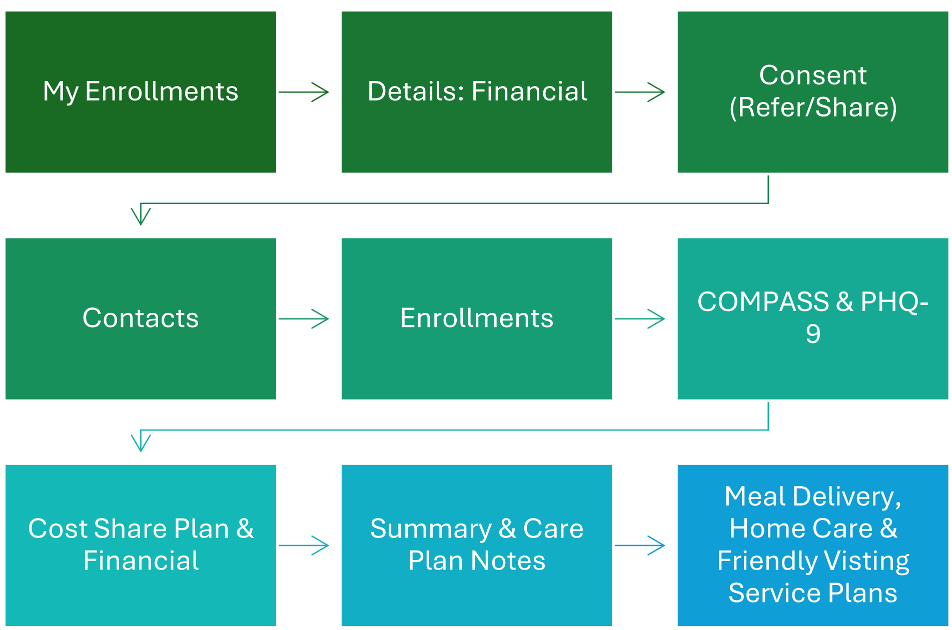
The following flow diagrams illustrate the navigation processes for key aspects of your work. These diagrams provide a general overview of the steps involved in completing key tasks, while also showcasing the various sections of the VIVÉ database. Detailed instructions on how to enter information are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

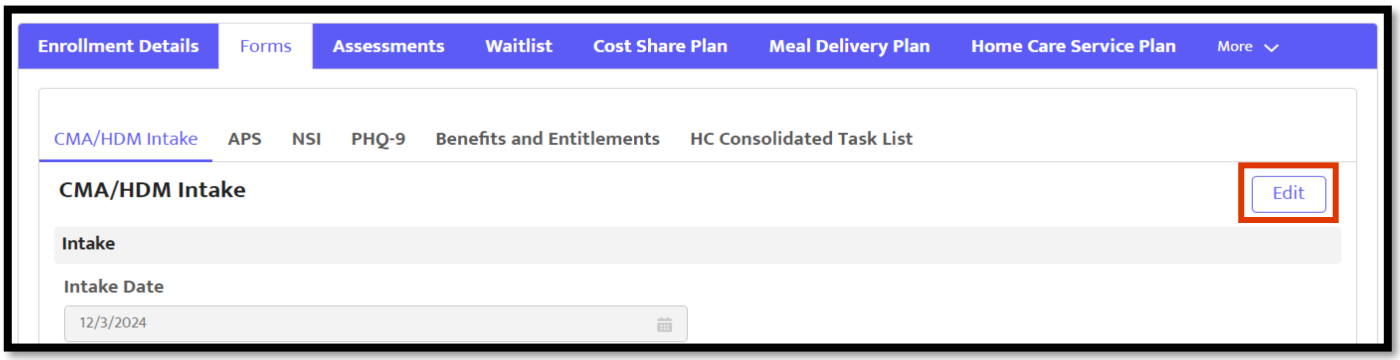
- **Page View** forms link directly to the questions. Intake Page View forms are CMA/HDM Intake, APS, and Benefits & Entitlements.
- **List View** forms provide a list of completed forms. The list includes many completed forms, such as someone's severity of depression from the PHQ-9. Intake List View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

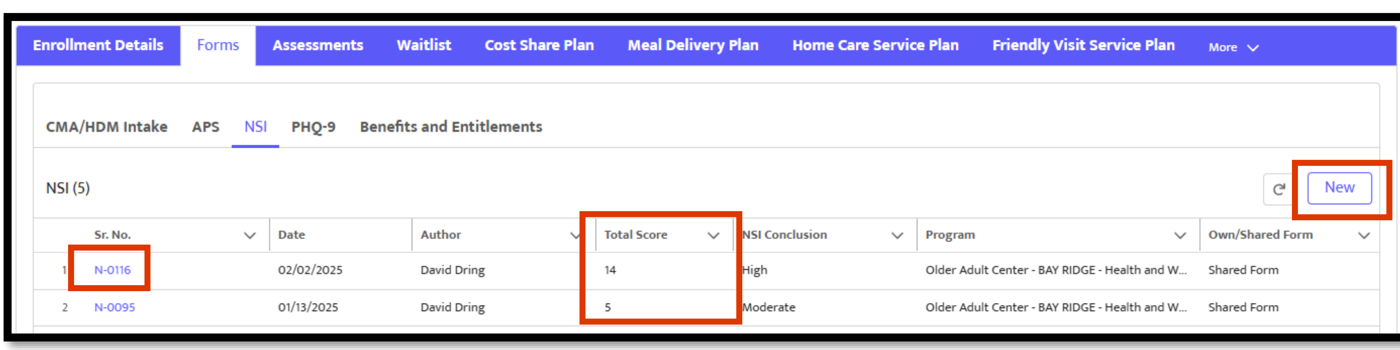
Example Page View form: CMA/HDM Intake. Select **Edit** to begin entering or editing the information.



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.

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

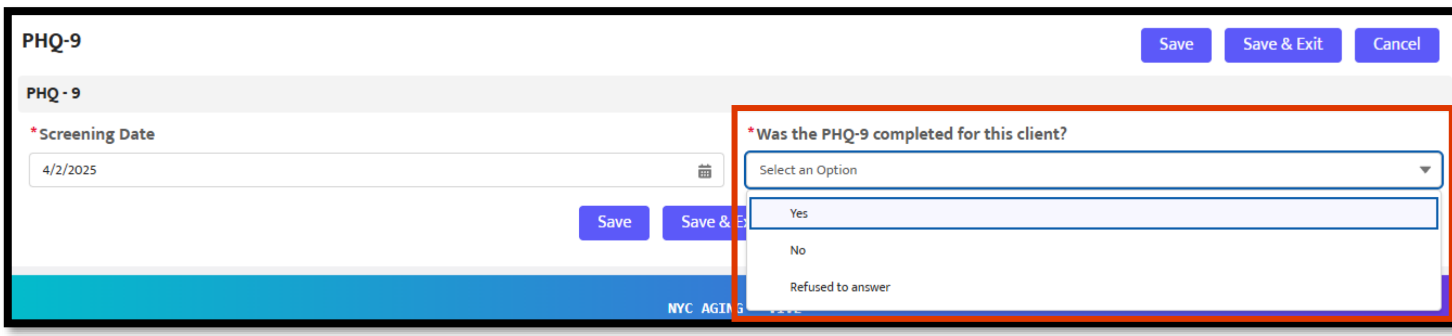


existing form. Both the NSI and PHQ-9 calculate a score based upon the entered information. They must be saved to calculate the score and then **Save & Exit** will return you to the List View where the score appears.

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.

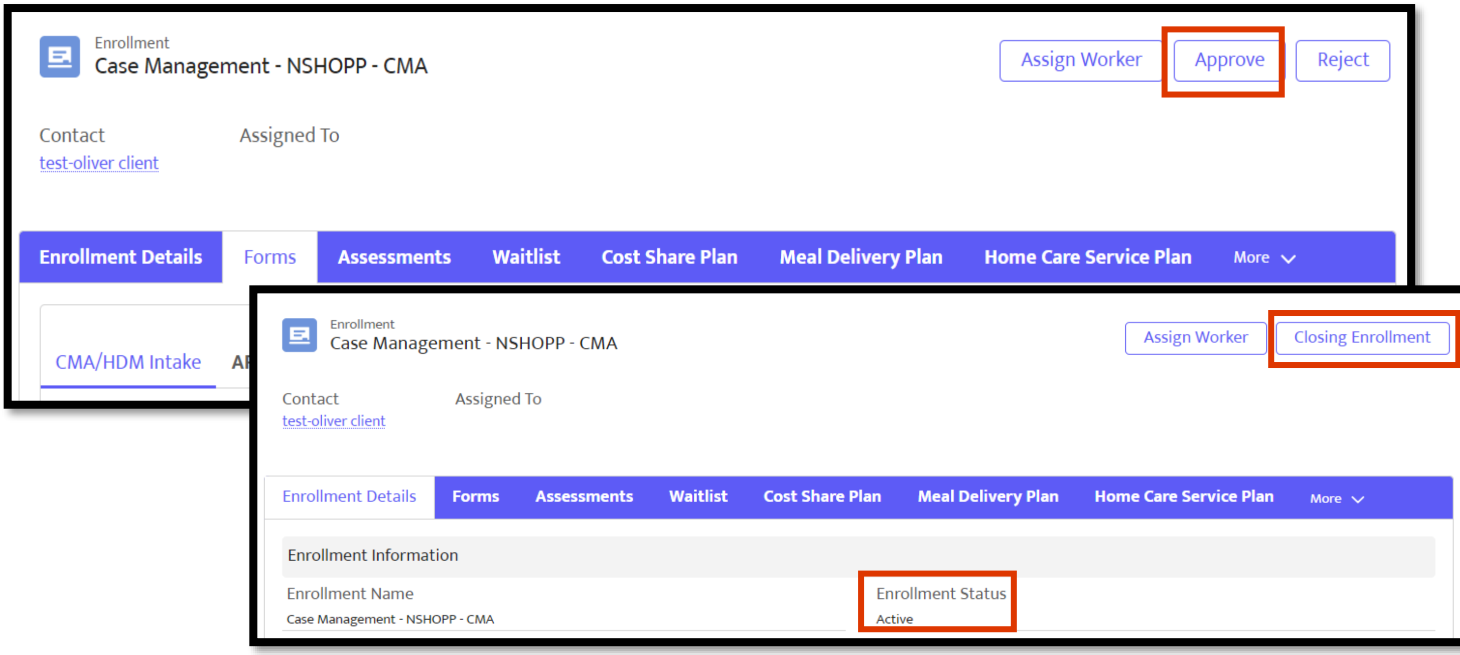
NOTE: *The **Intake Date** field on all forms defaults to today's date. Intake dates can be back dated. However, they cannot be dated in the future.*

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

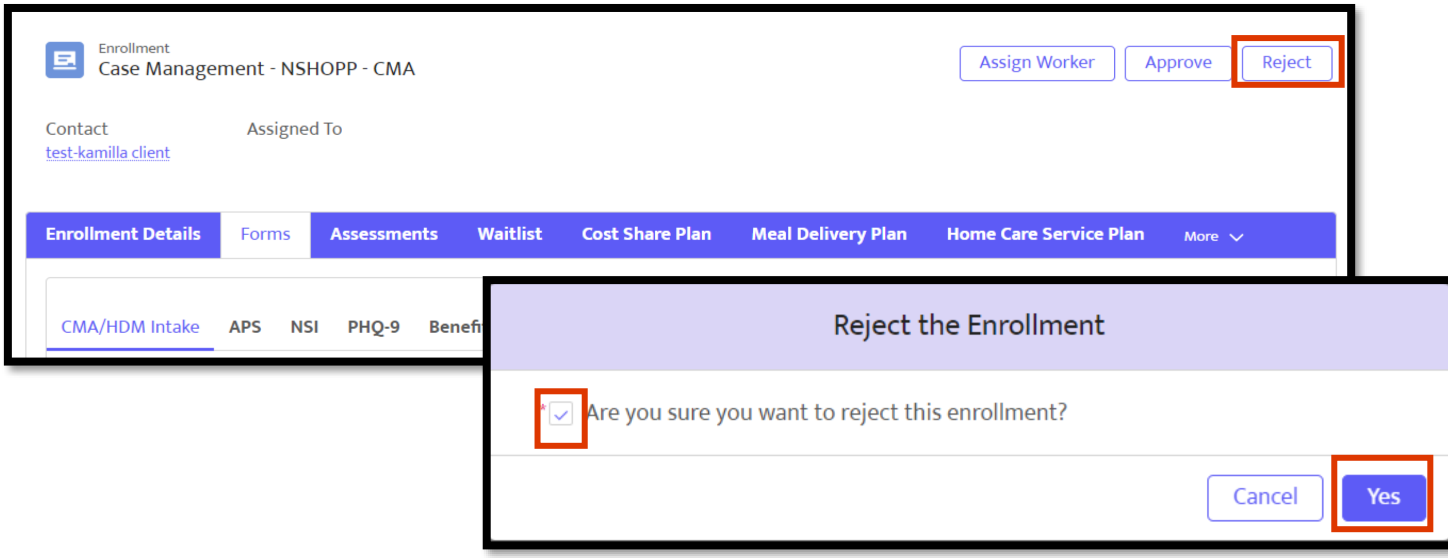
Step 1: The Supervisor selects the **Approve** button. The Enrollment Status switches to **Active**. The buttons switch as well. **Closing Enrollment** replaces the **Active** and **Reject** buttons.



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**.

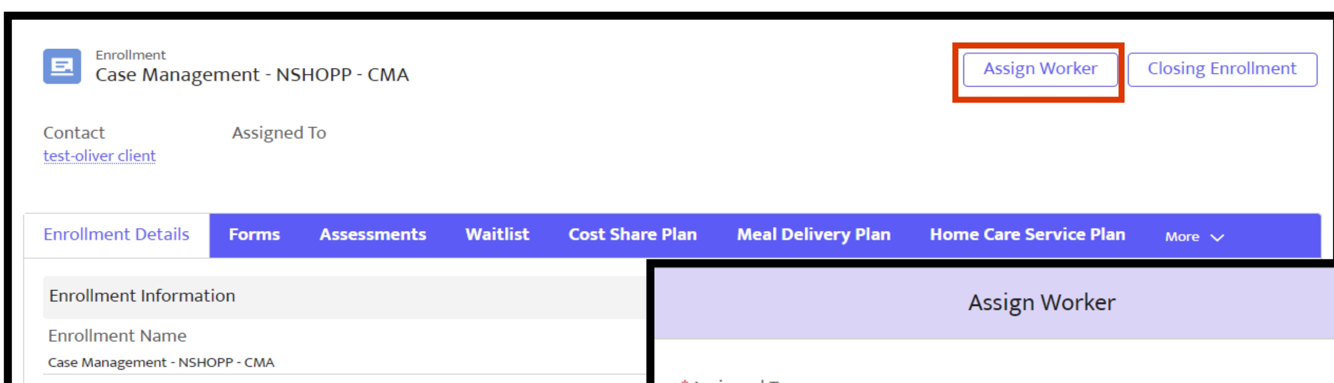


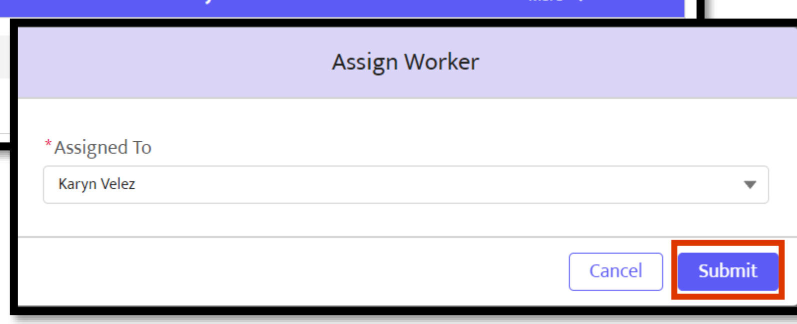
NOTE: *Once the Reject button is selected and the client becomes Inactive, the only way to "reactivate" the client's Enrollment, is by creating a new Enrollment.*

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.

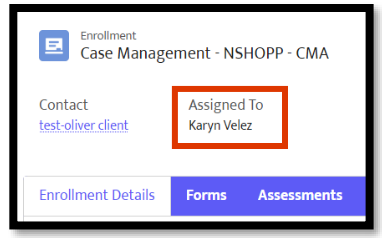




Step 2: From **Assigned Worker** pop-up use the dropdown list to pick whom you are assigning the client to. Select the **Submit** button.

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.

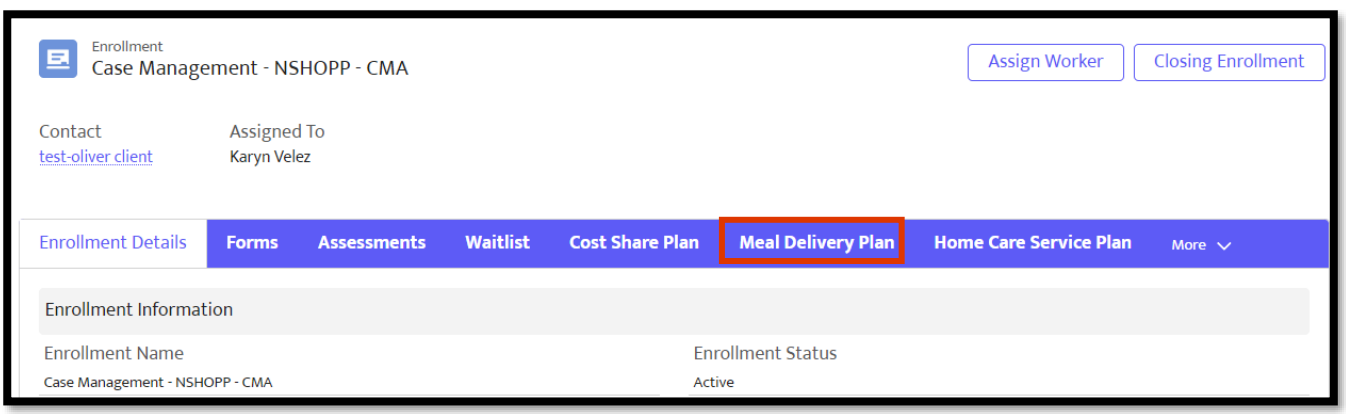
NOTE: *If the worker assignment needs to be changed, the* ***Assign Worker*** *button continues to be available on the* ***Enrollment Details Menu****. Complete this same process to re-assign the client's case.*

Authorizing a *PEC* Meal

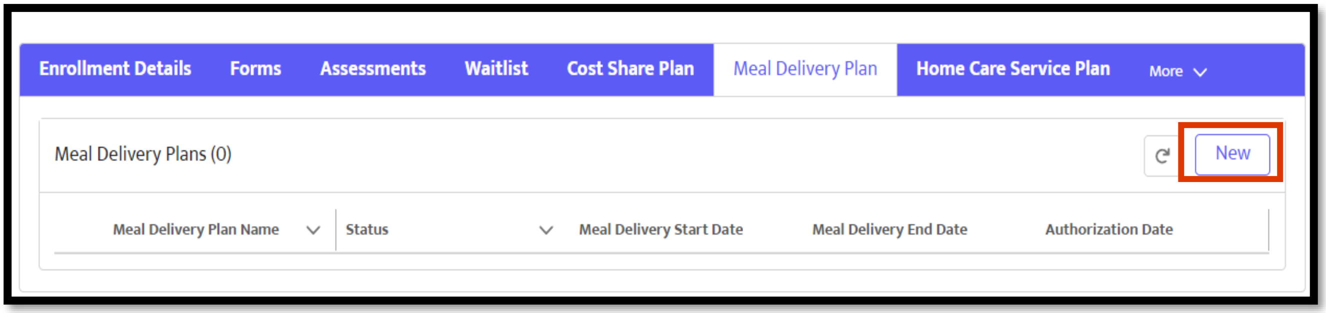
At the time of the **CMA/HDM Intake**, a ***Presumptive Eligible Client (PEC)*** home delivered meal can be authorized for clients once the intake is completed. A *PEC* Meal can be activated and referred to your HDM provider before the client's in-home assessment is completed.

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**.



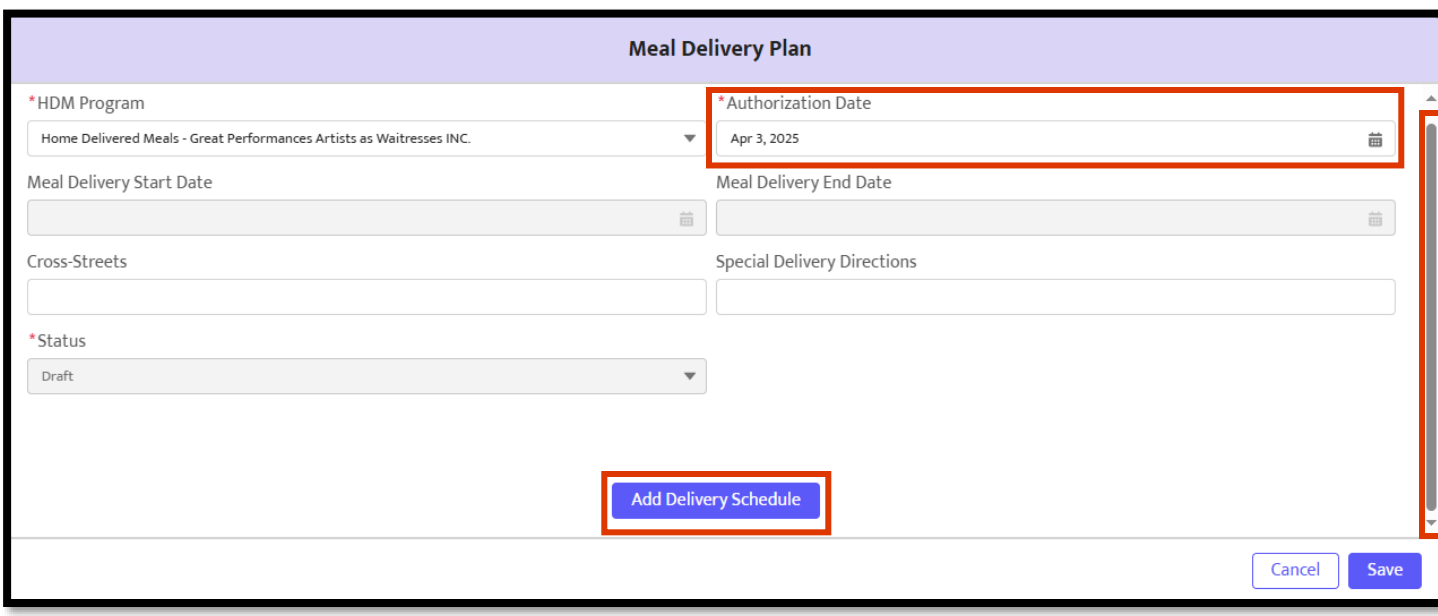
Step 3: The Meal Delivery Plan includes fields that are completed by you and others completed by your HDM provider. The fields completed by you are:

- **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.

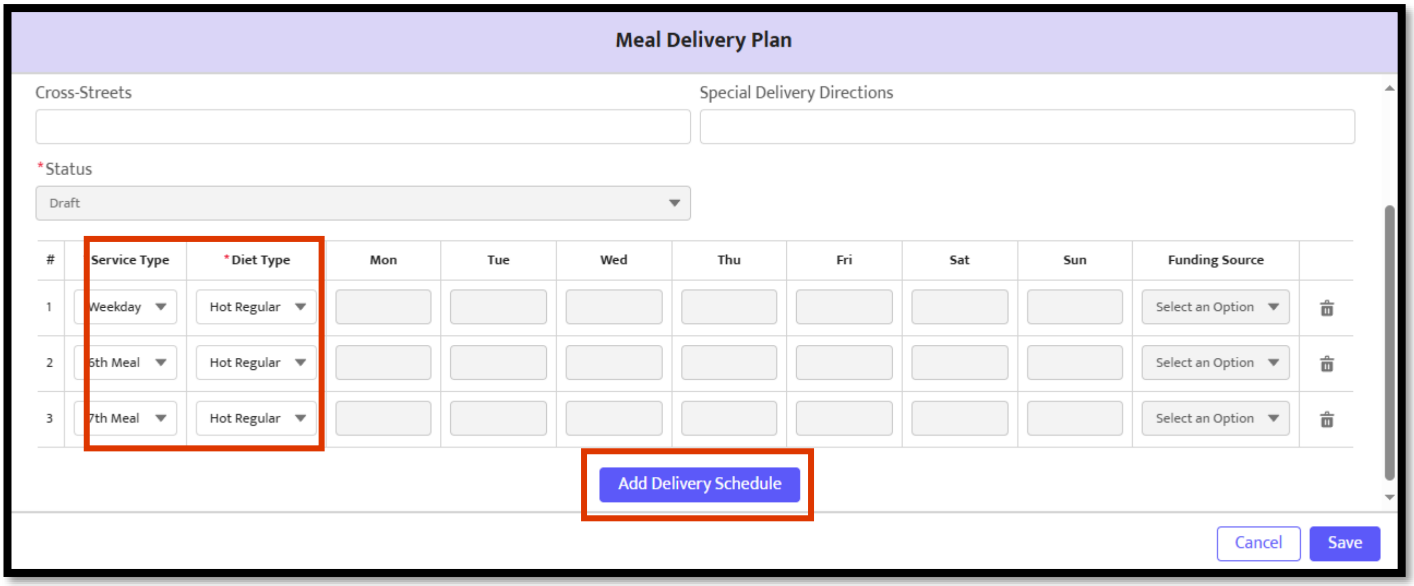
Step 4*:* Select the **Add Delivery Schedule** button to access the **Service Type** and **Diet Type**. You may need to use the vertical scroll bar on the right side of the window.



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.



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.*

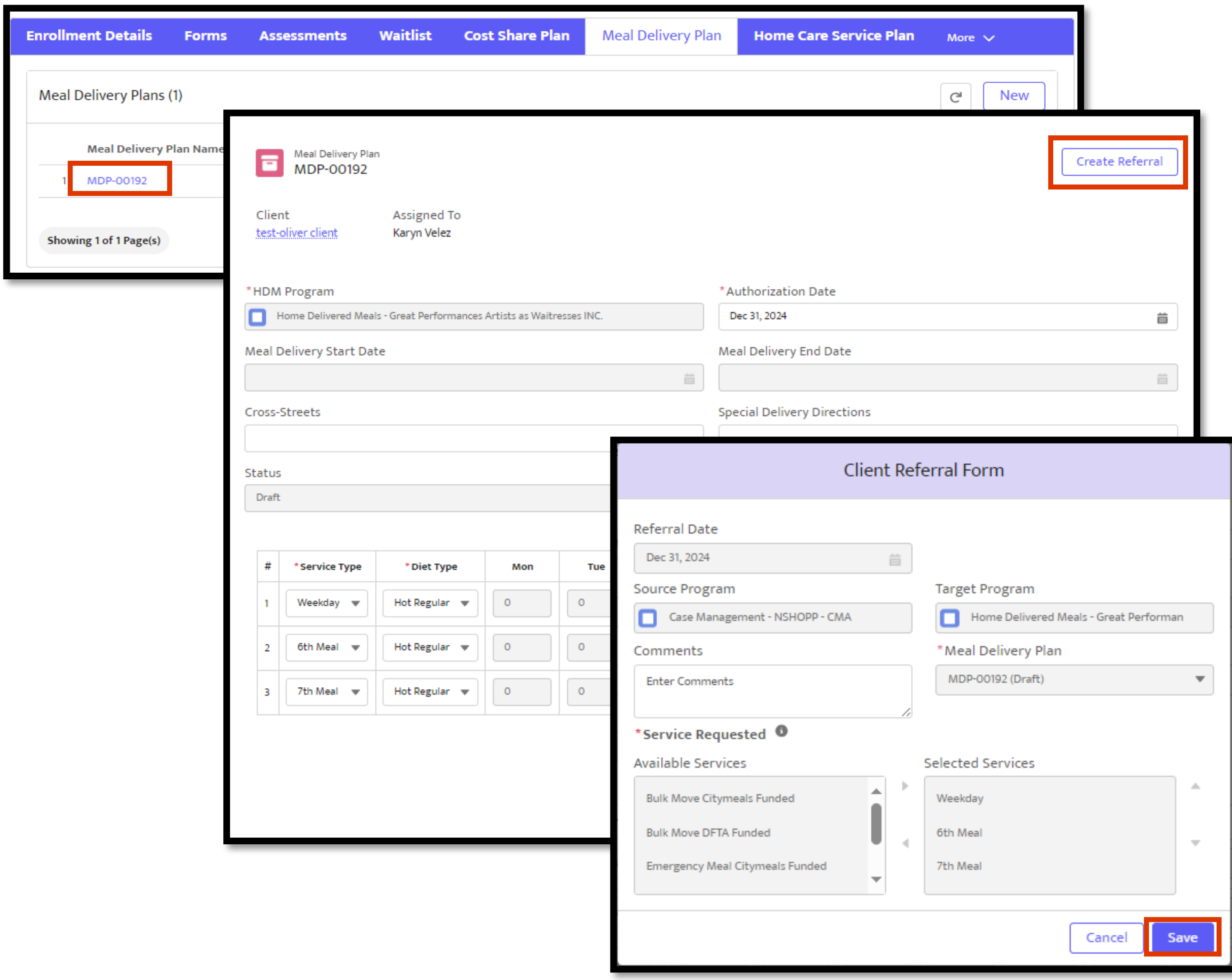
Referral of a *PEC* Meal to the HDM Program

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.

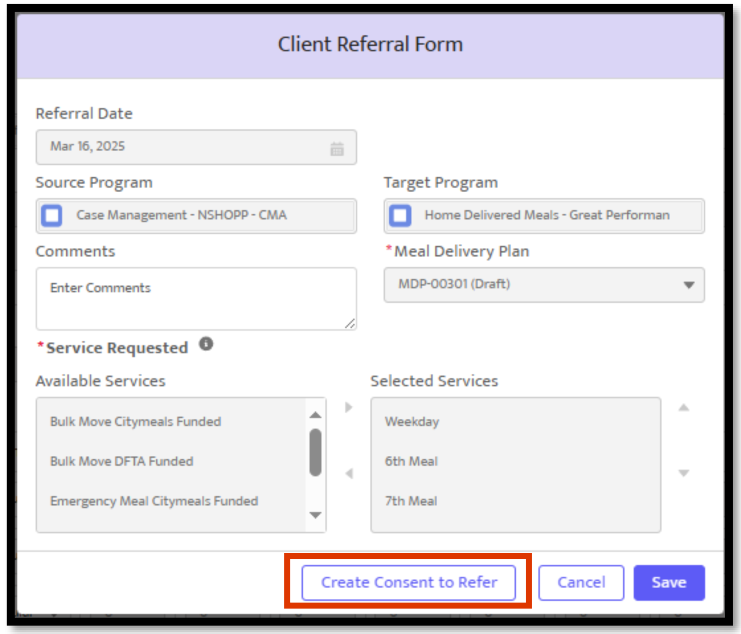
Step 3: The **Client Referral Form** pop-up appears with pre-populated data from the **Meal Delivery Plan** that cannot be edited. The only editable field is the **Comments** text box where additional information regarding the meal delivery is shared.



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

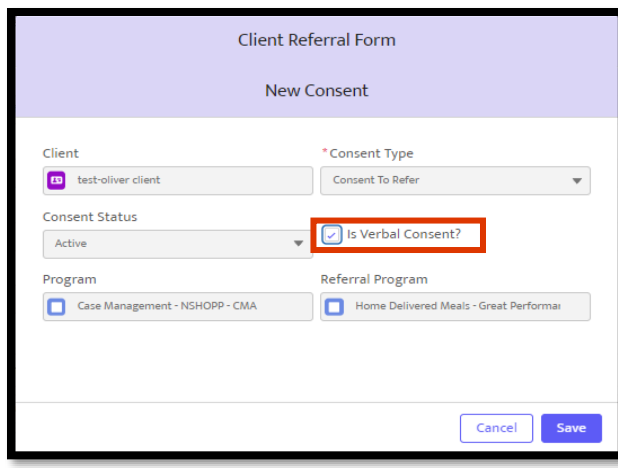
NOTE: *To send PEC Meal referrals from the Meal Delivery Plan, a verbal **Consent to Share/Refer** must first be created. This consent type is created by selecting the Consents tab on the "Client Profile" level and completing the form.*

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.



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.



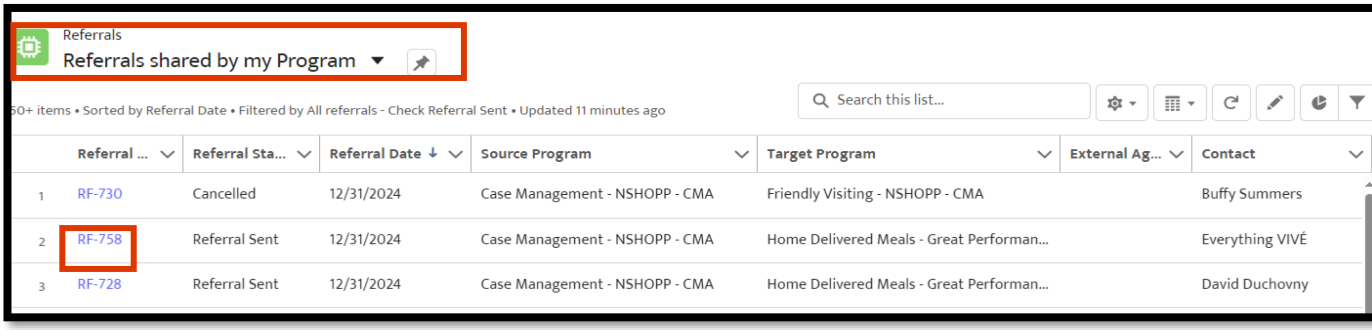
NOTE: *Once the client is assessed, the Consent Refer/Share form must be signed and uploaded into the client's file on VIVÉ.*

Best Practice, Confirm Referral is Sent

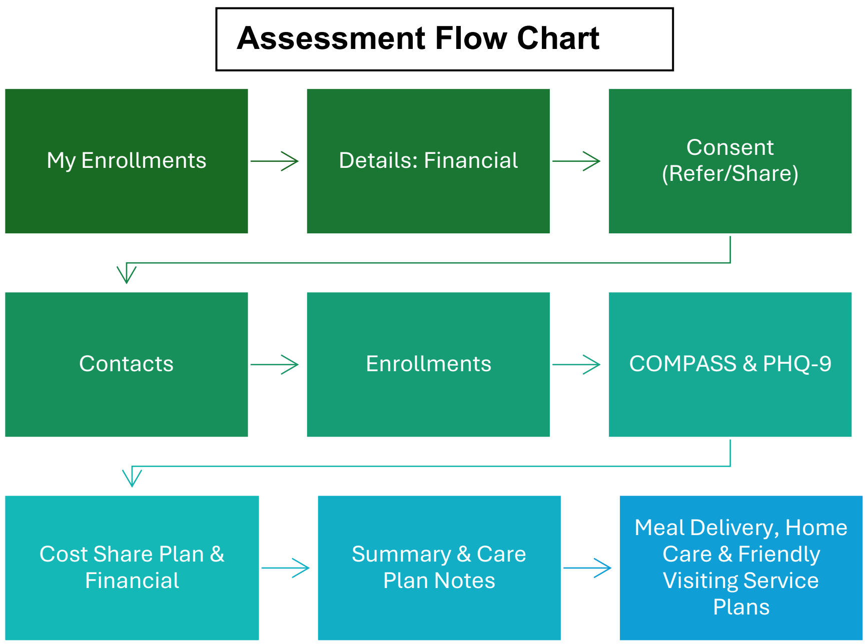
Use the **Referral Queue** to confirm your referral was sent.

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

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.

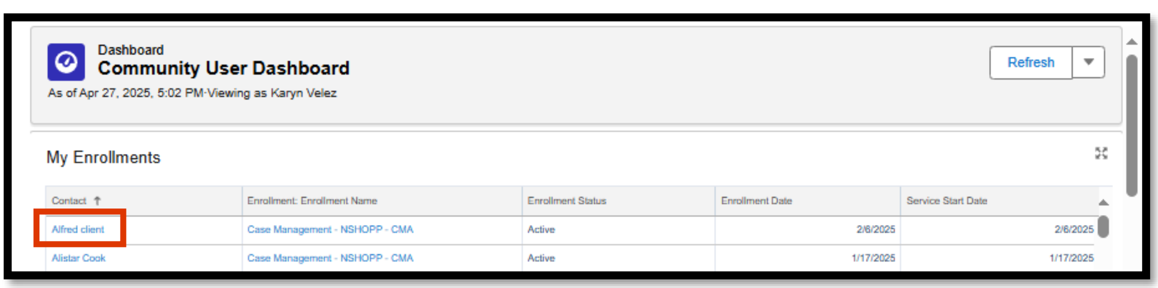


Assessment Flow Chart

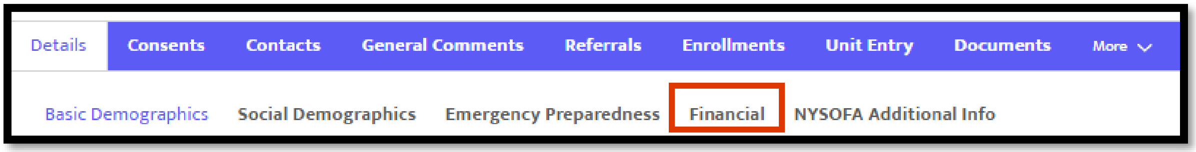


When completing the input of the **COMPASS** assessment data in VIVÉ, the process follows the basic flow that is represented in the **Assessment Flow Chart** diagram above.

- 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.



- 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

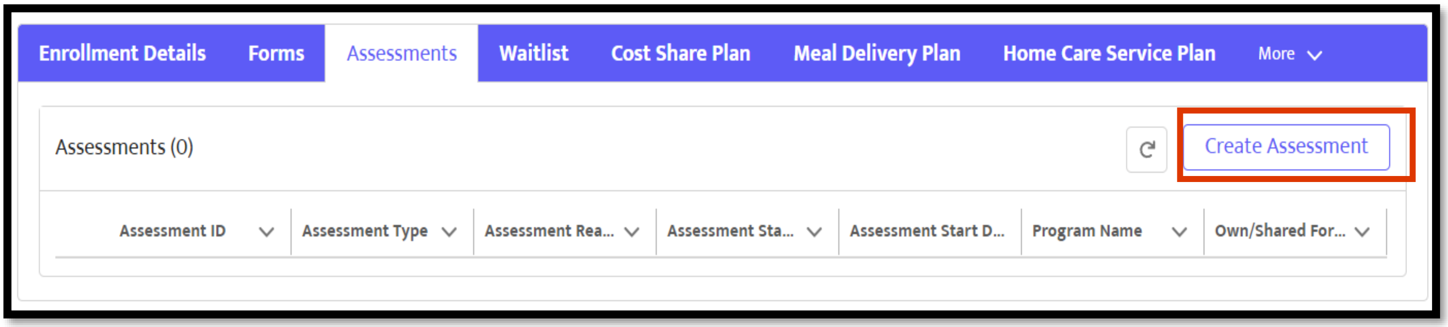
In this section, we discuss the various ways the **COMPASS** form is accessed and provide navigational instructions on how to input data into the form. In addition, we review how to navigate and input data into the **PHQ-9** form.

Accessing the COMPASS form

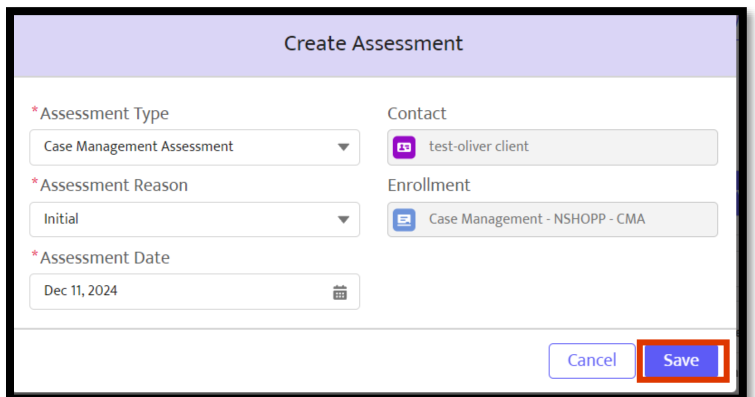
You can access the **COMPASS** form in one of three ways: 1) by creating a new **Assessment**, 2) by opening an existing **Assessment** that has a status of **Pending** or 3) by **Cloning** an **Assessment** with a status of **Completed**. The steps for each of these options are as follows:

Creating a New Assessment

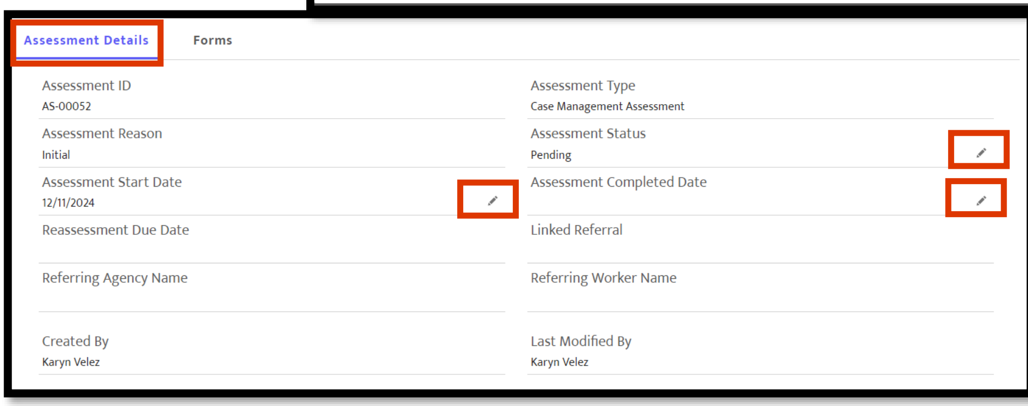
Step 1: From the **Enrollment Details Menu**, click the **Assessments** tab. Select the **Create Assessment** button to activate a new assessment.



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**.

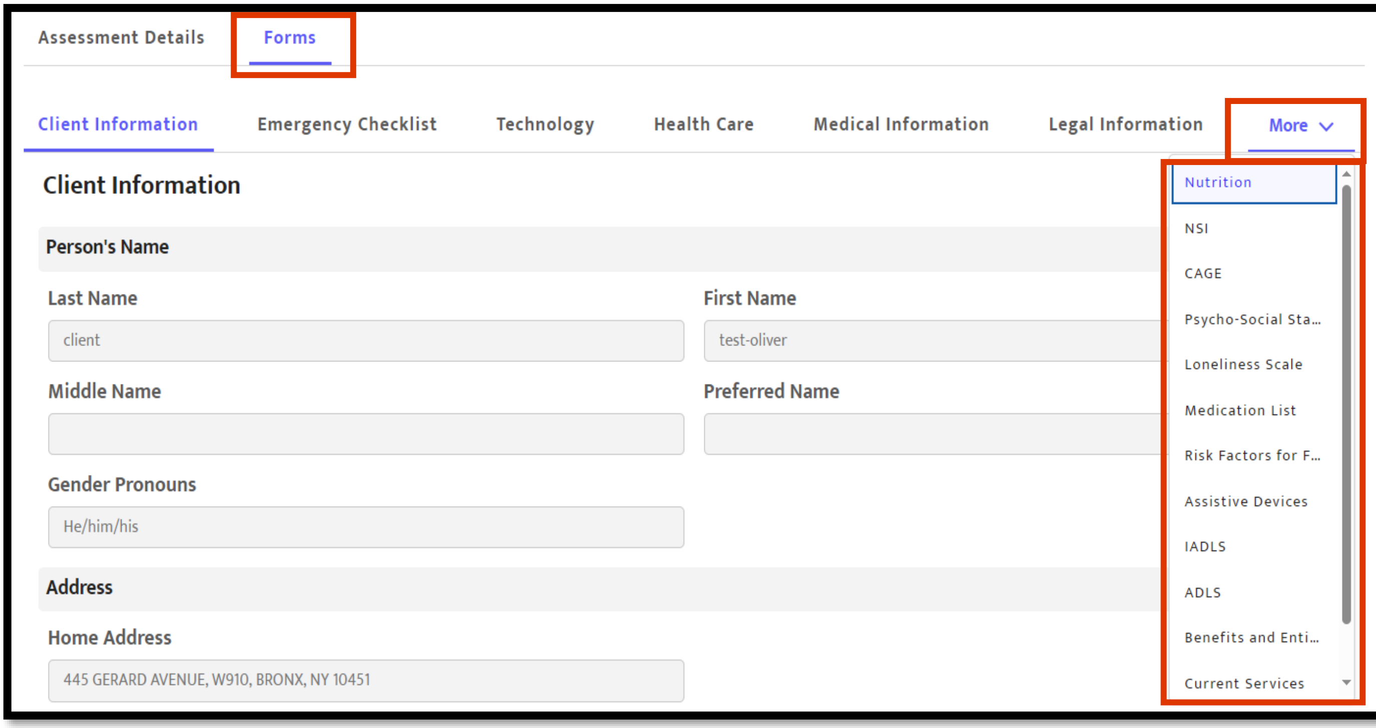


The **Assessment Details** form displays and provides an overview of key information associated with the assessment. Select any pencil icon to make edits.



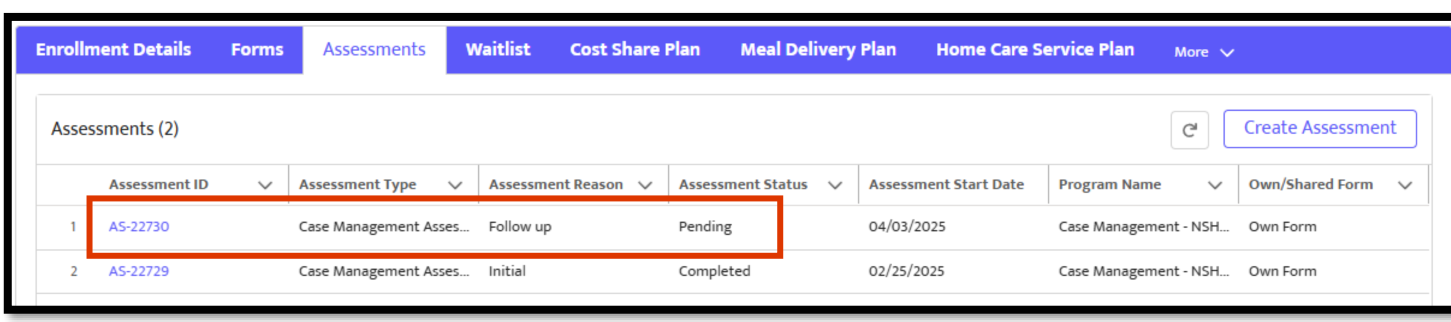
Step 3: Select the **Forms** tab to open the **COMPASS**. The sections on the COMPASS form are divided into sub-tabs. Information for a particular section is added or edited by first selecting its sub-tab. For COMPASS sections not visible among the sub-tabs, click on **More** to access the dropdown of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



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.



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

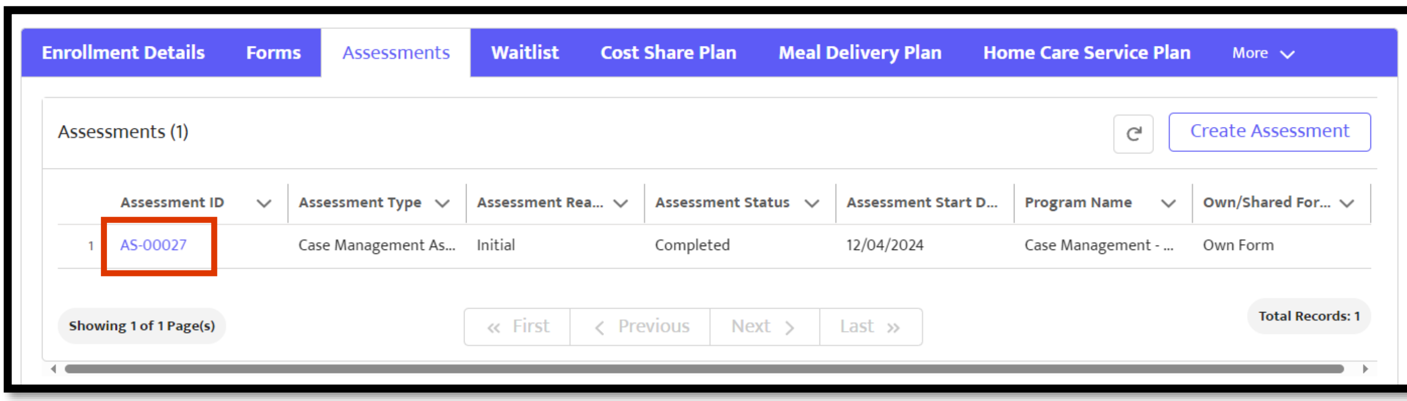
Step 3: Click one of the Forms from the sub-tabs. For COMPASS sections not visible among the sub-tabs, click on **More** to access the dropdown of all COMPASS Forms.

Cloning an Assessment

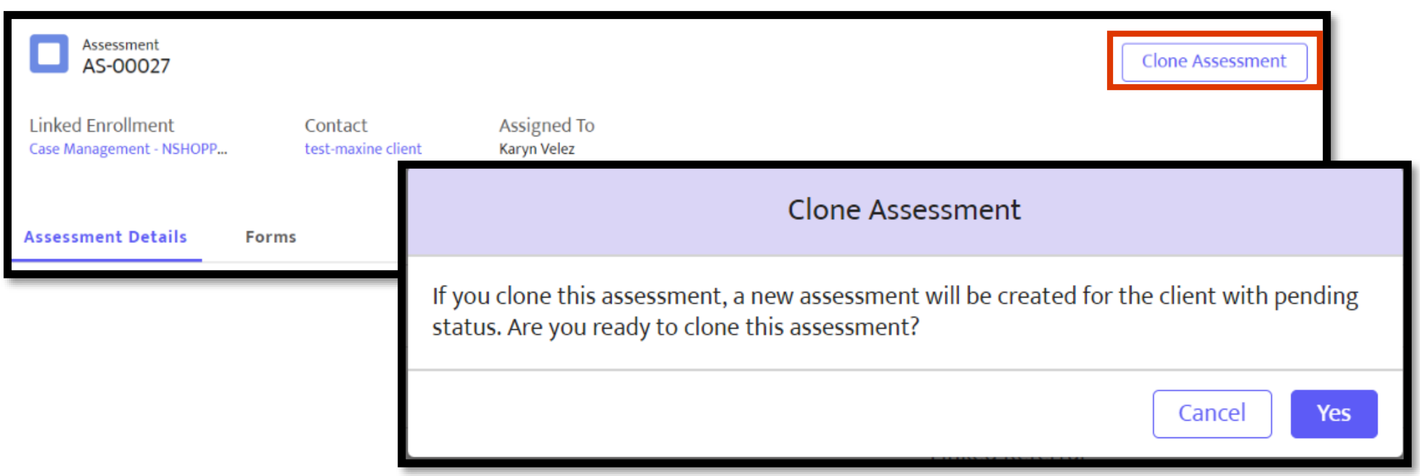
At the time of reassessment, to save time with completing the COMPASS Reassessment, there is the option to clone or copy the previous assessment.

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**.

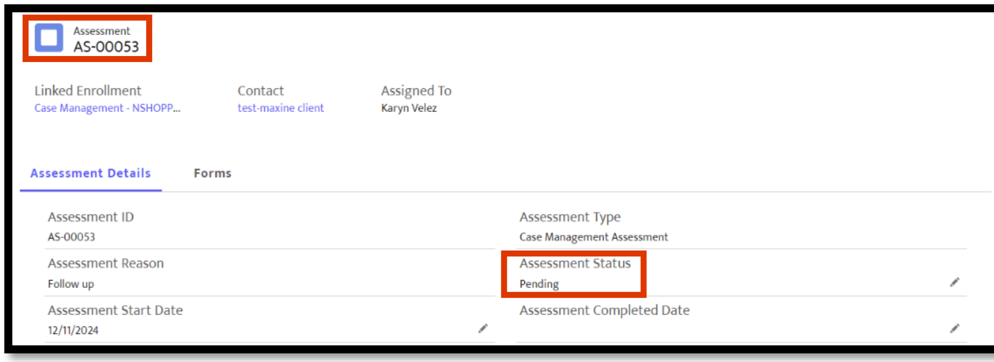


Step 3: On **Assessment Details** select the **Clone Assessment** button.



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**.

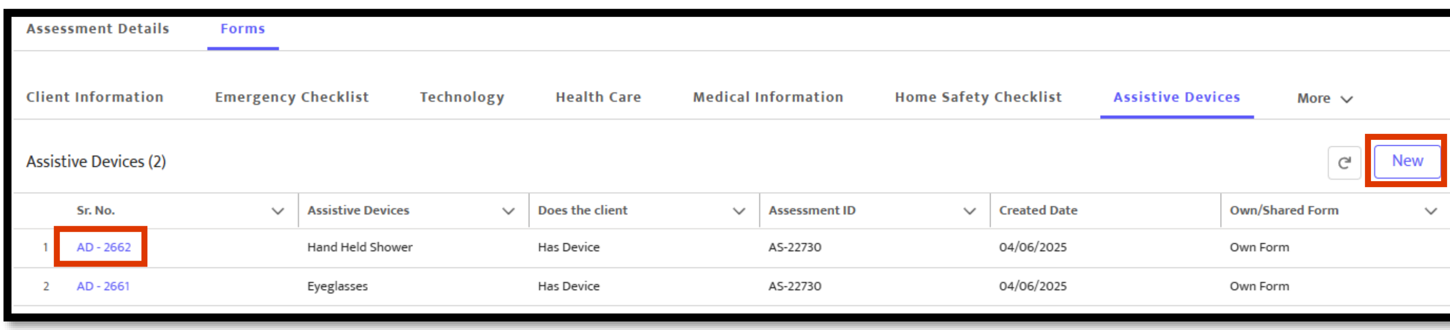
Step 5: Click on the Forms tab. Click on one of the sub-tabs. Click **More** for a dropdown menu of forms not visible.



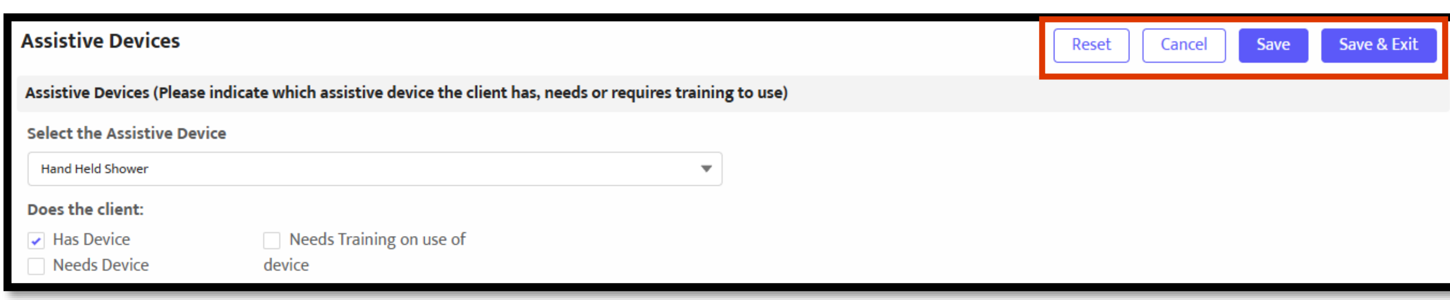
Inputting Data in the COMPASS forms

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



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

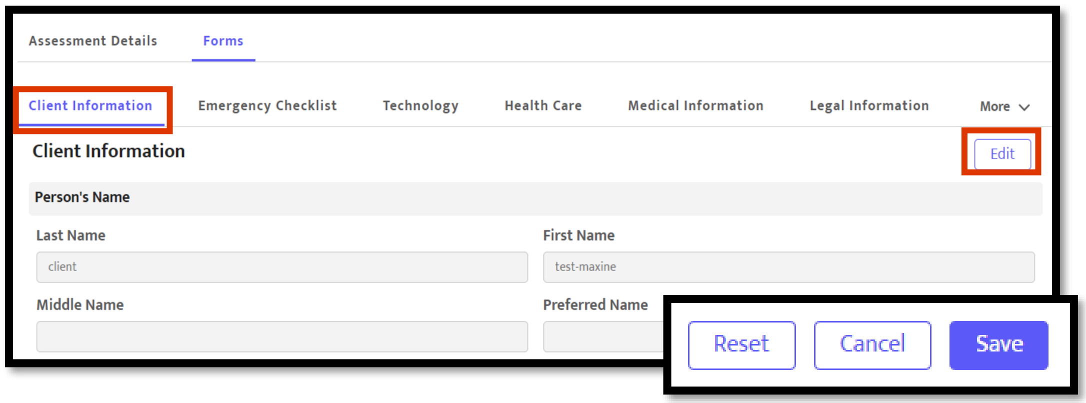


List View forms have multiple options after you have viewed or edited the page. They are:

- **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.



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**.

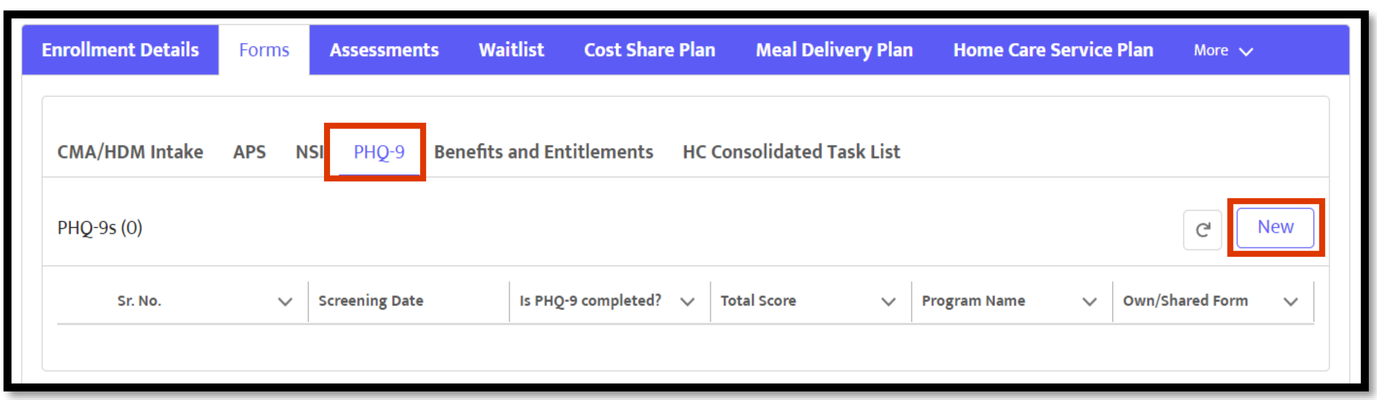
Page View: Edit Button	List View: New Button
Client Information	Medical Information
Emergency Checklist	CAGE
Technology	Loneliness Scale
Health Care	Medications List
Legal Information	Assistive Devices
Nutrition	
NSI	
Psycho-Social Status	
Risk Factors for Falls	
IADLS	
ADLS	
Benefits and Entitlements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

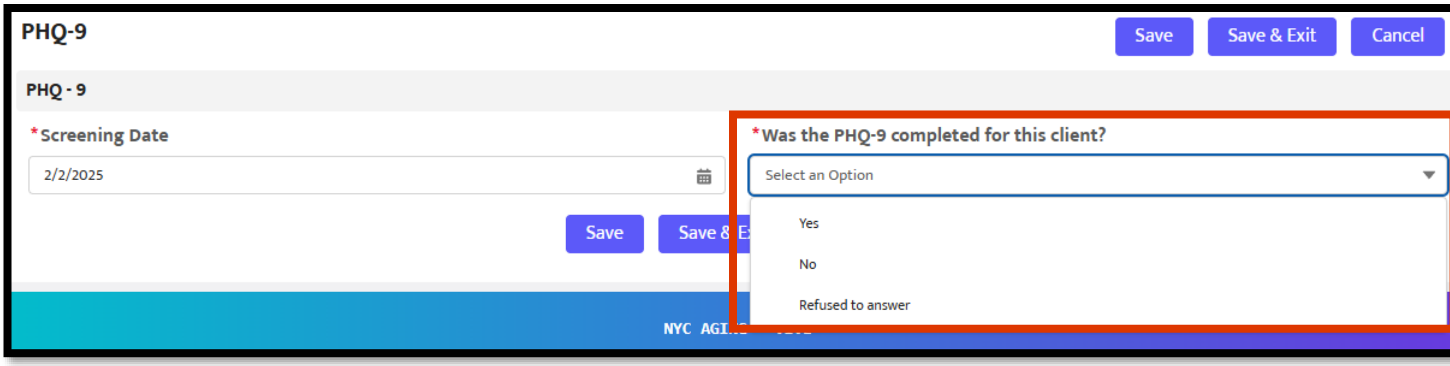
Assessing the PHQ-9 form

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

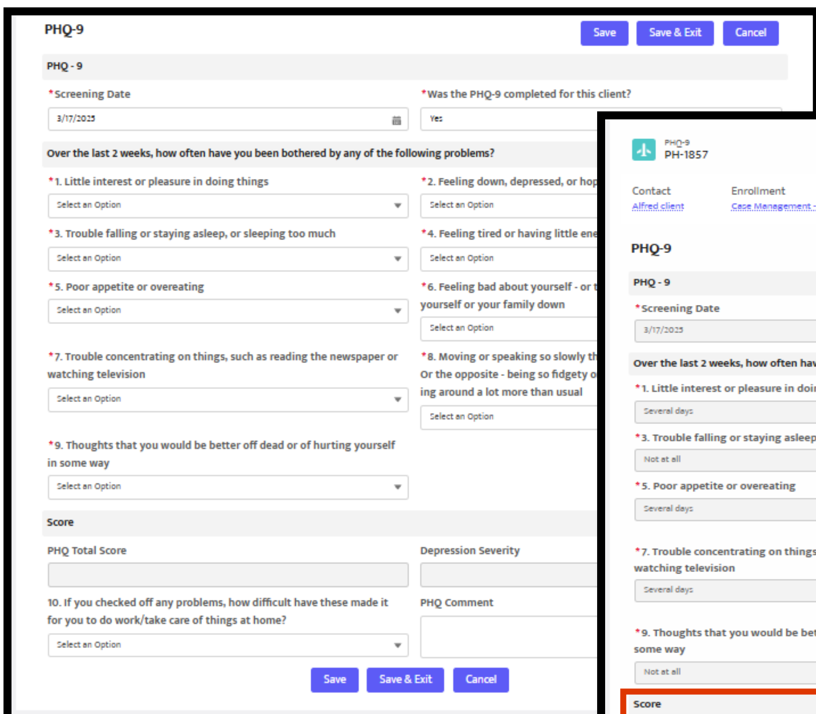
Step 1: Click the **PHQ-9** sub-tab. The List View appears providing a general overview of the information associated with each listed record. Select **New** to create an entry.

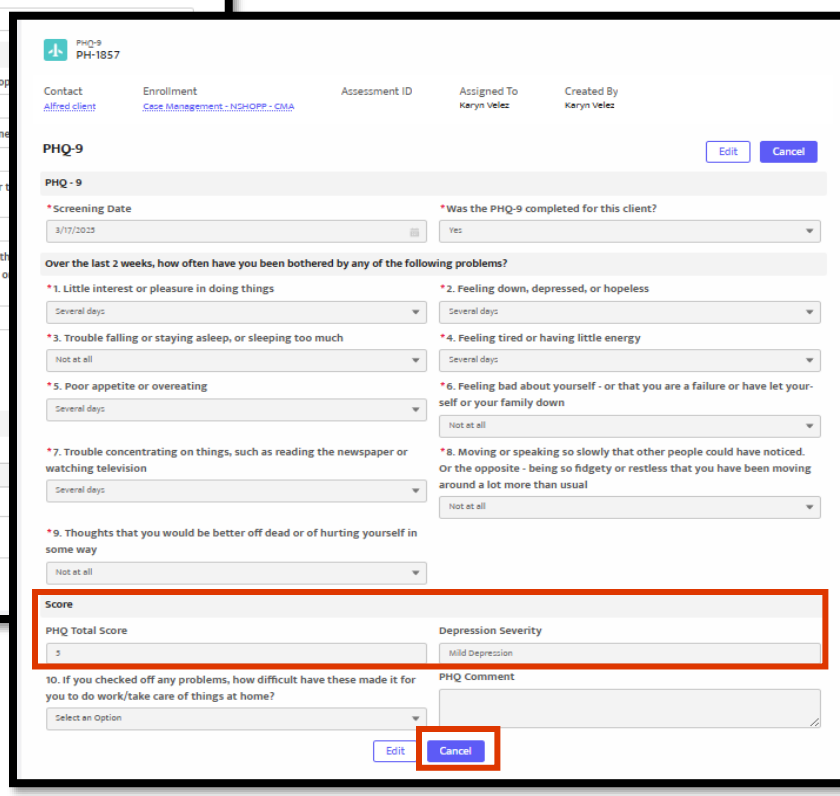


The **PHQ-9** is a conditional form. You must answer **Yes** to the question **Was the PHQ-9 completed for this client?** for additional questions to display.



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



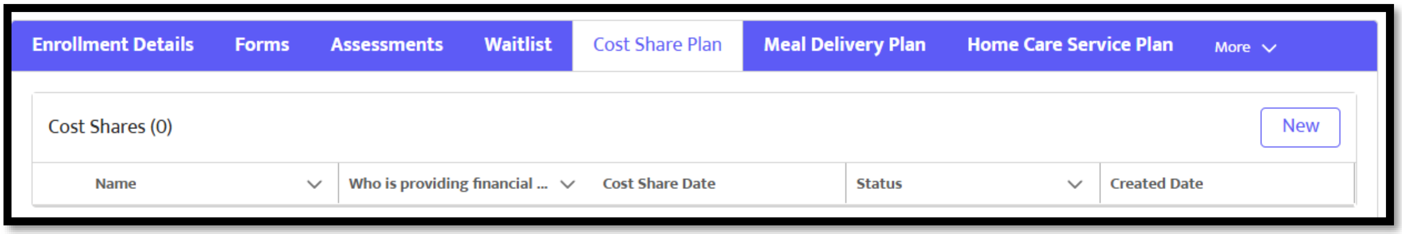


After answering all the questions, select **Save** and the score is calculated. Then select **Cancel** to return to the List View.

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**.

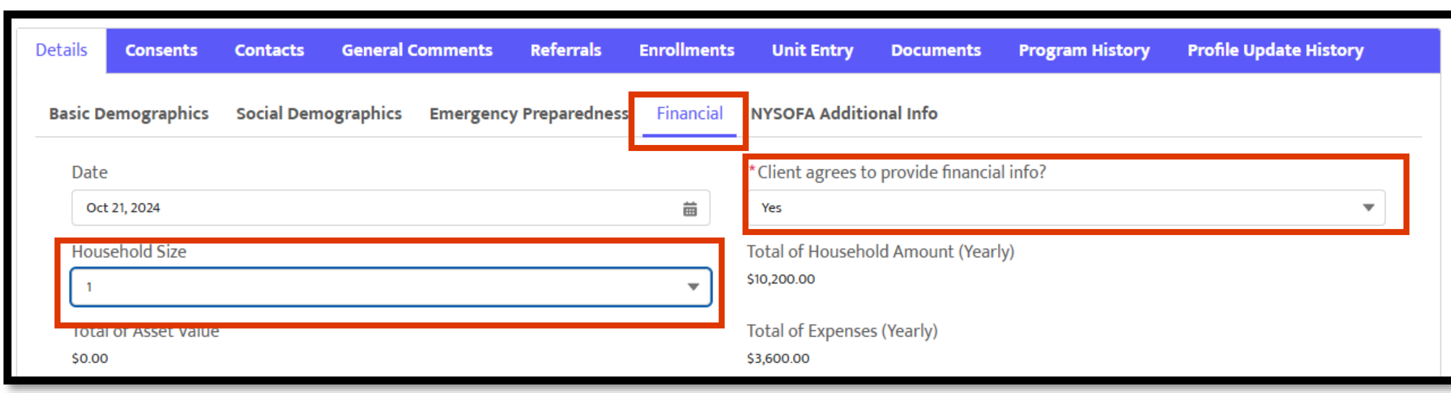


In the **Cost Share Plan** form are three sub-tabs – **EISEP Cost Share**, **Community Medicaid Prescreen** and **Client Agreement Checklist**. Each of these forms must be completed to generate a **Cost Share Plan** used in the creation of a **Home Care Service Plan** referral**.**

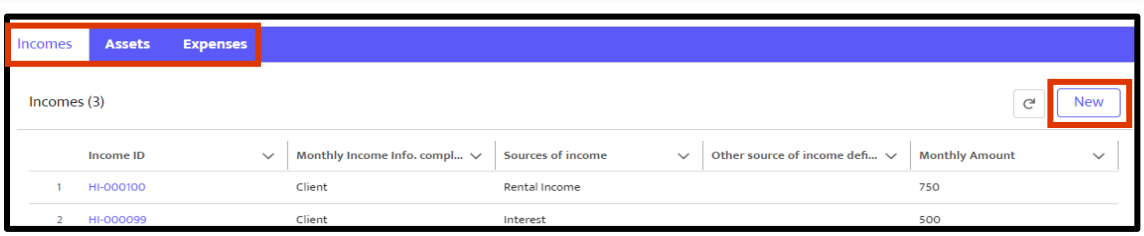
Cost Share Prerequisite: Financials

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.

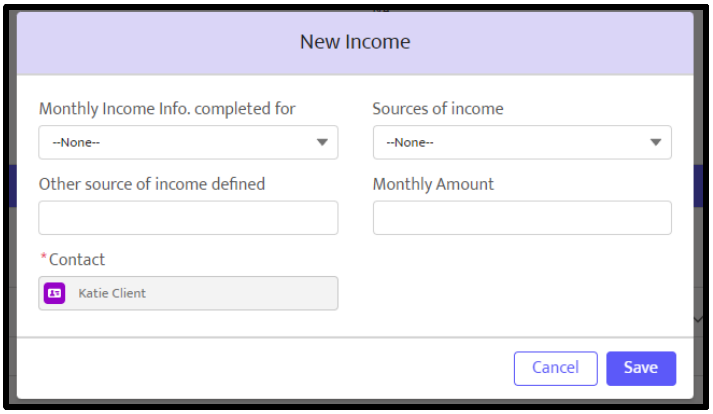


At the bottom of the page, there are three tabs: **Incomes**, **Assets**, and **Expenses**.



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.

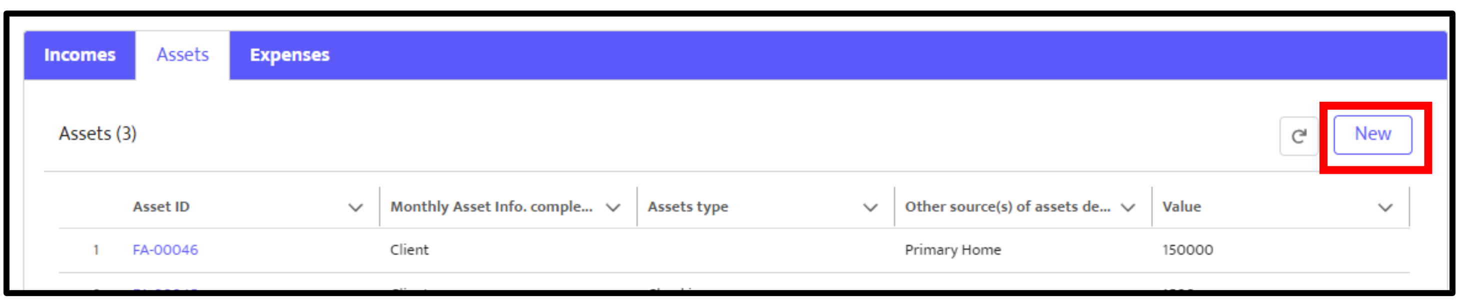
At the top of the page, there is a summary of the household size and its total annual income, total assets and total expenses. If you want to see the Poverty Levels chart, click the hyperlink underneath the **Poverty Level PDF** label.

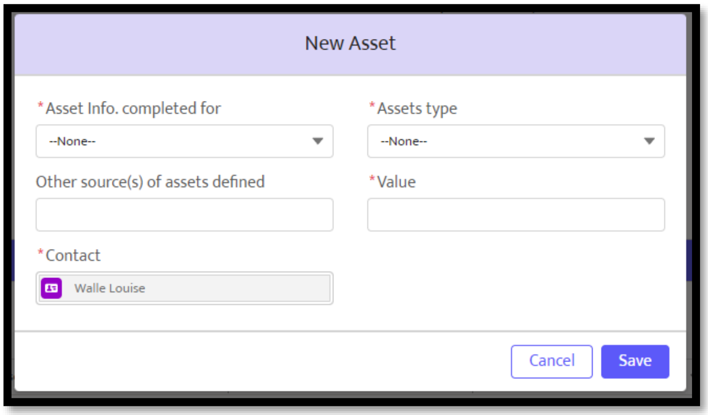
To edit any of these details, click the **Income** tab then click the link for a source of income. That brings you to the details for that income source, those details can be edited by clicking any of the pencils. Select **Save** when finished and **Exit** to return to the top of the page.

***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.



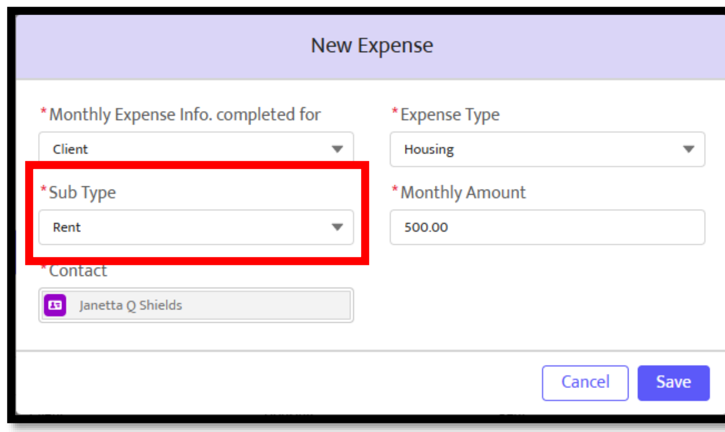


The **New Asset** pop-up identifies the owner of the asset, its type and value.

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.

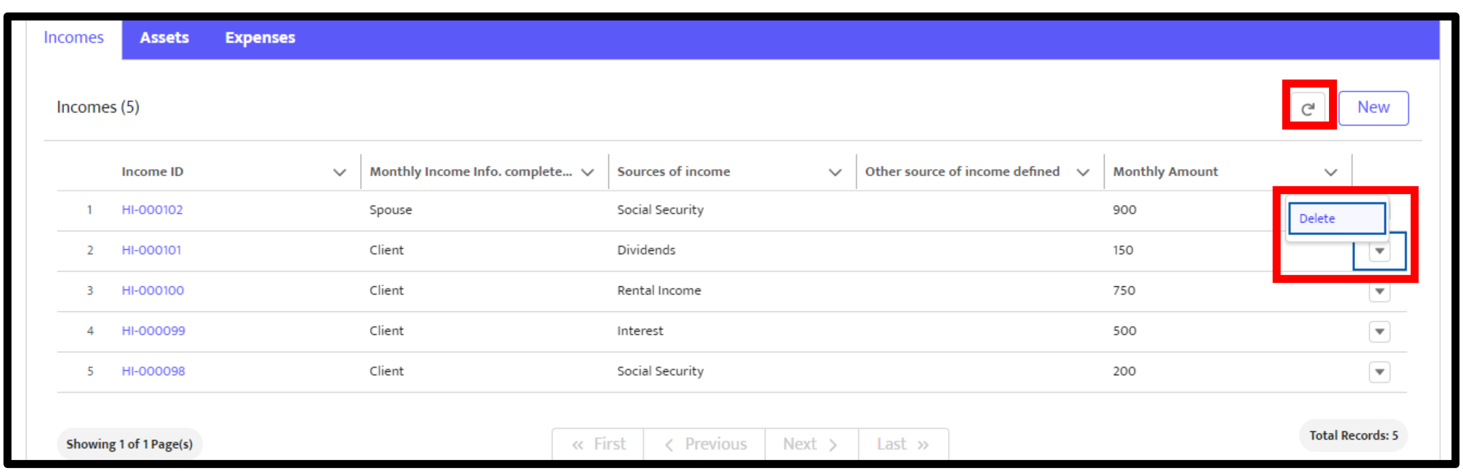
To Enter Expenses

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.



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.



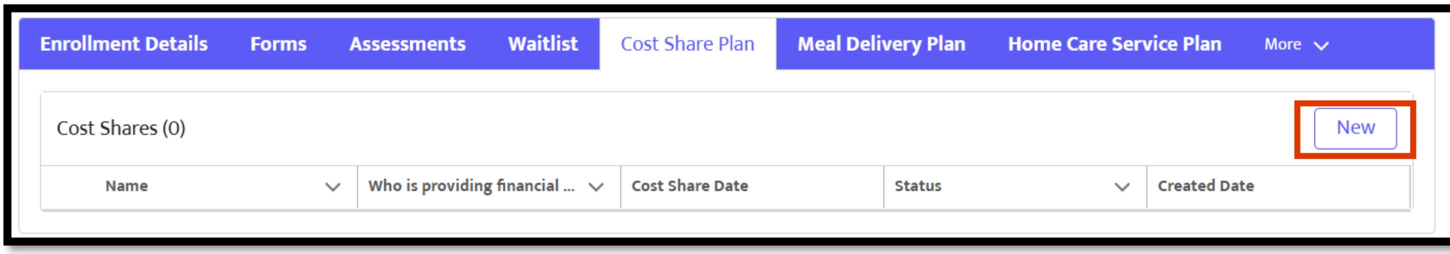
NOTE: *Input each specific **Incomes**, **Assets** or **Expenses** source one at a time using the **New** button. In addition, you must input each household member's associated **Incomes**, **Assets** or **Expenses** separately.*

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.

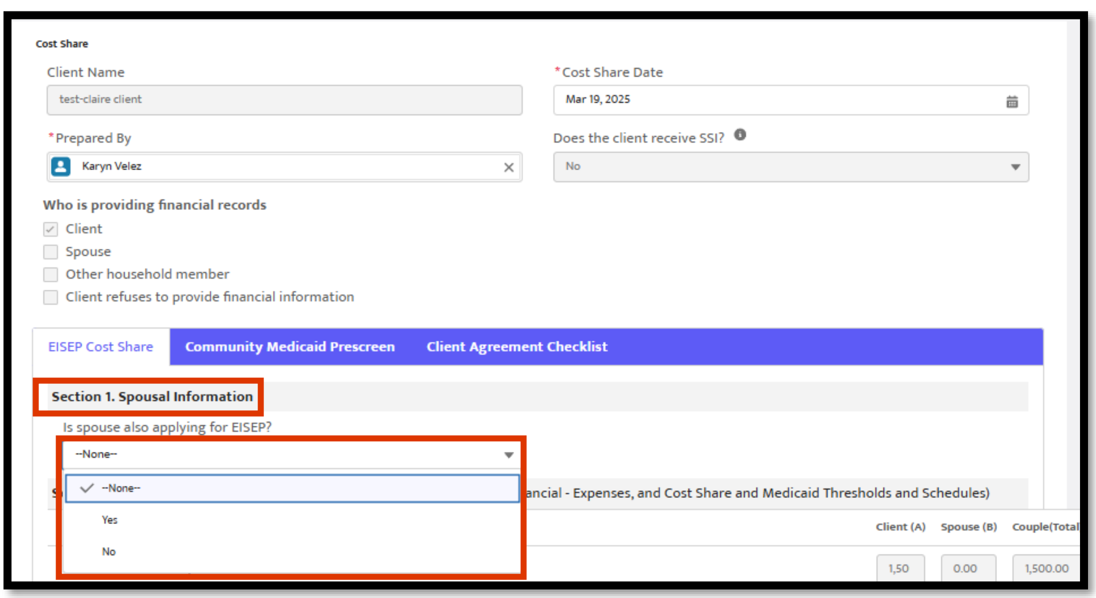


Step 3: Check who is providing this financial information and begin the first of three sub-sections.

EISEP Cost Share

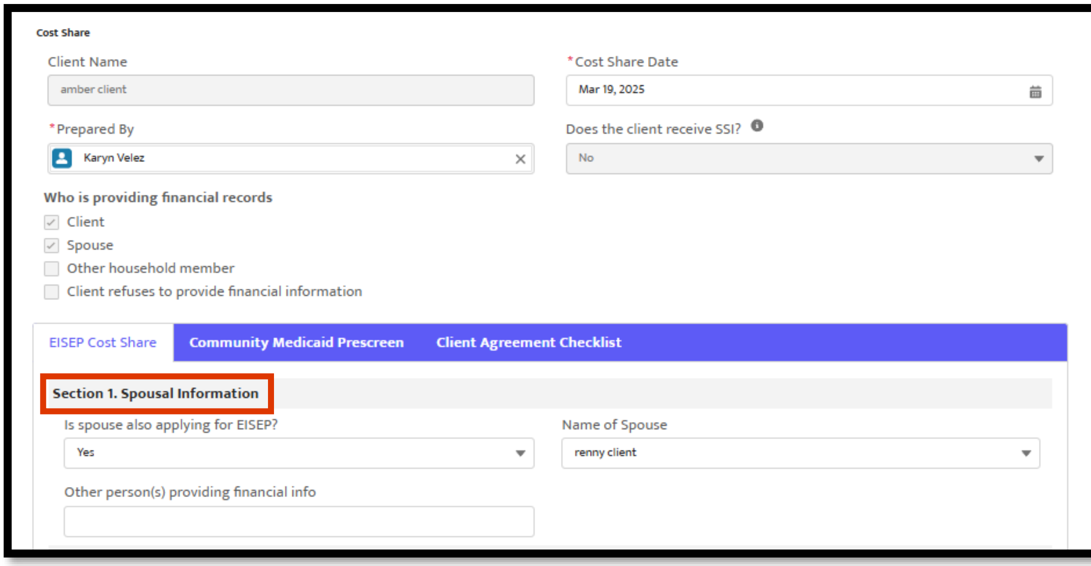
The **EISEP Cost Share** form is divided into six sections – **Spousal Information**, **Monthly Income**, **Housing**, **Housing Adjustment**, **Cost Share** and **Monthly Contribution**.

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**.



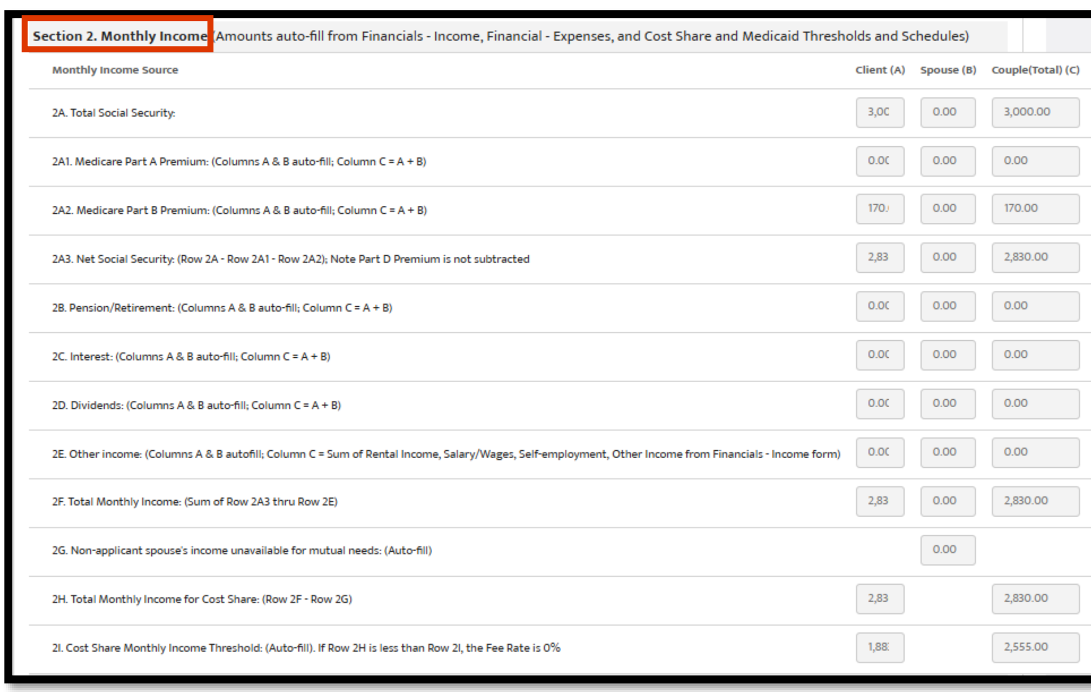
If the cost for EISEP services calculated is for an individual without a spouse, the field choice does not need to be changed.

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.



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 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 $0	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 $0	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.

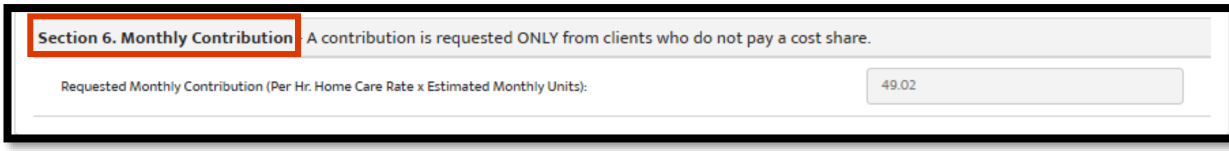
Section 5. Cost Share

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

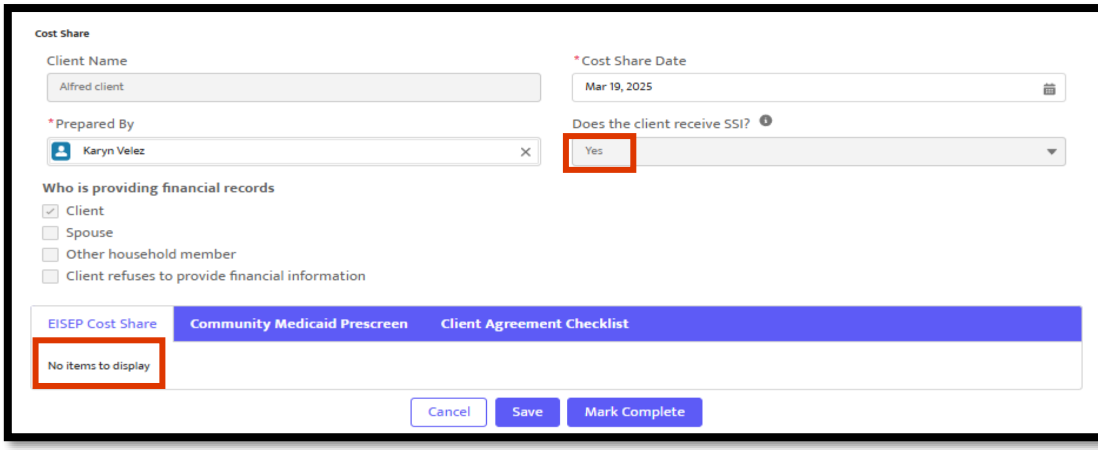
Service Type*	Auth. Weekly Units*	Estimated Monthly Units	Unit Cost	Monthly Cost
Homemaker/Personal Care	8	34.40	28.50	980.40

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.



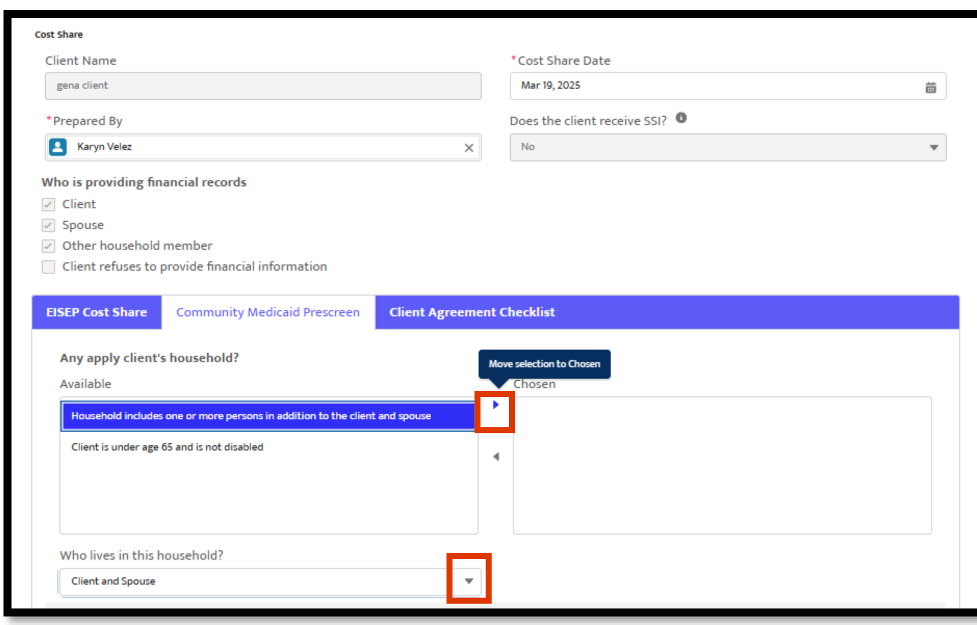
If the client is in receipt of Supplemental Security Income (SSI), they are not eligible for EISEP services because they are recipients of Medicaid. The **EISEP Cost Share** form therefore, will note **No items to display**.



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.*

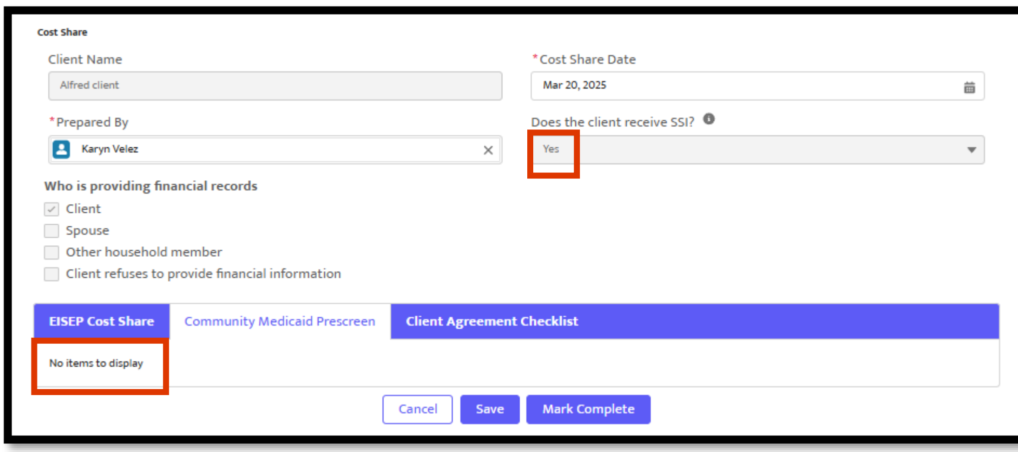


Section 1. Resources has no editable fields. Fields are pre-populated with data from the **Assets** and **Expenses** sub-tabs on the **Financial** form as well as other values associated with screening for Medicaid financial eligibility.

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.

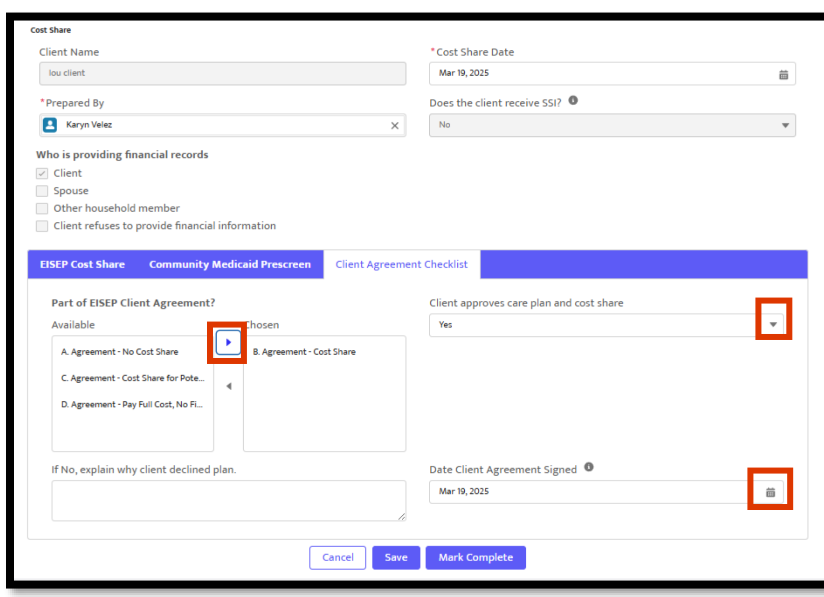
If the client is in receipt of Supplemental Security Income (SSI), they are already in receipt of Medicaid. The **Community Medicaid Prescreen** form therefore, will note **No items to display**.



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.



> ***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.

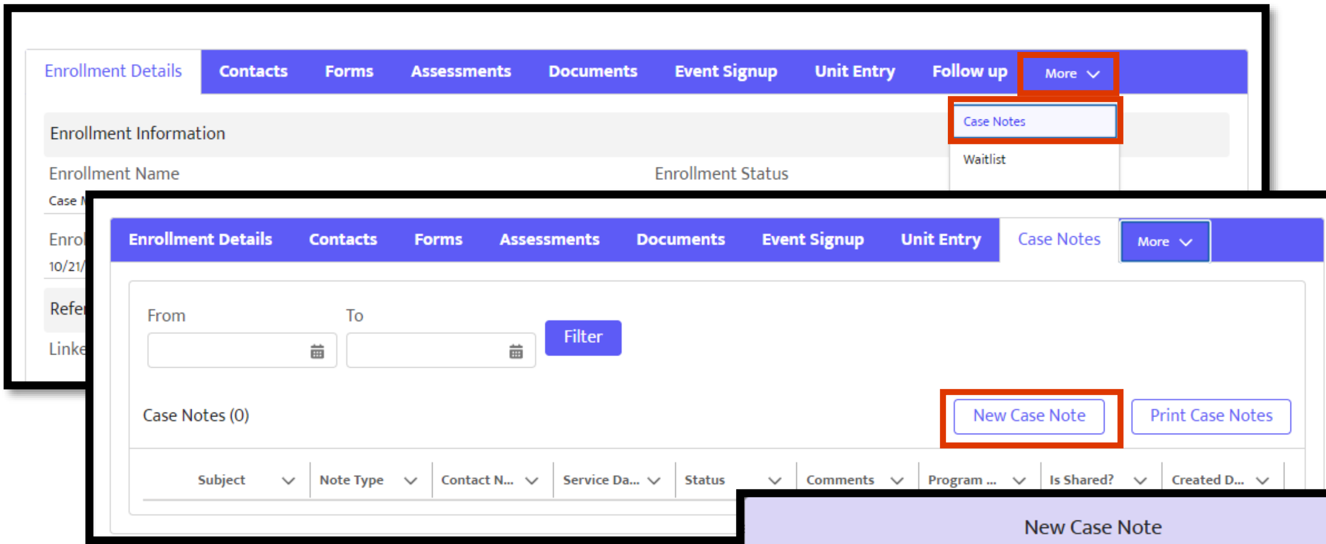
> **NOTE:** *A new Cost Share cannot be created if a Cost Share is listed in* ***Draft*** *status. The error message, "****Cost share already exists in draft status"*** *appears and you cannot complete the process. A new Cost Share can only be completed when previous Cost Shares are listed in* ***Completed***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

Summary & Care Plan Notes

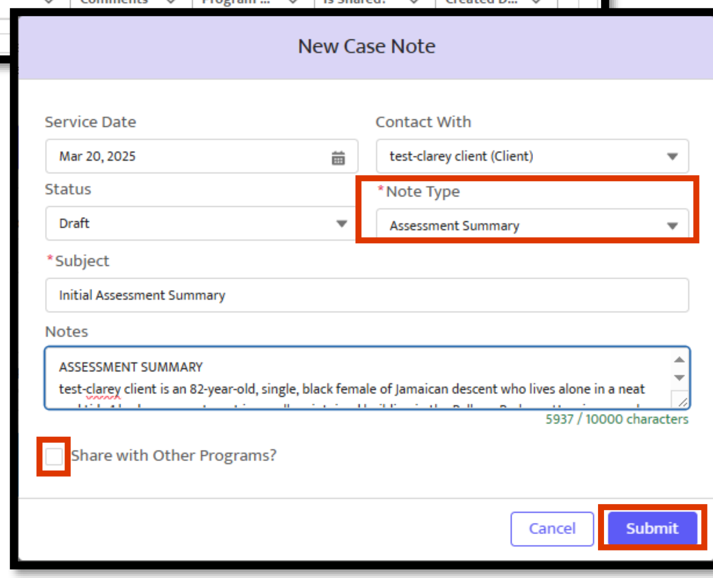
The **COMPASS Summary** (assessment, reassessment or event-based) and associated **Care Plan Notes** are a **Note Type** option that can be documented in **Case Notes**. What follows are the navigational instructions for inputting this data into **Case Notes**.

Adding a Summary & Case Note

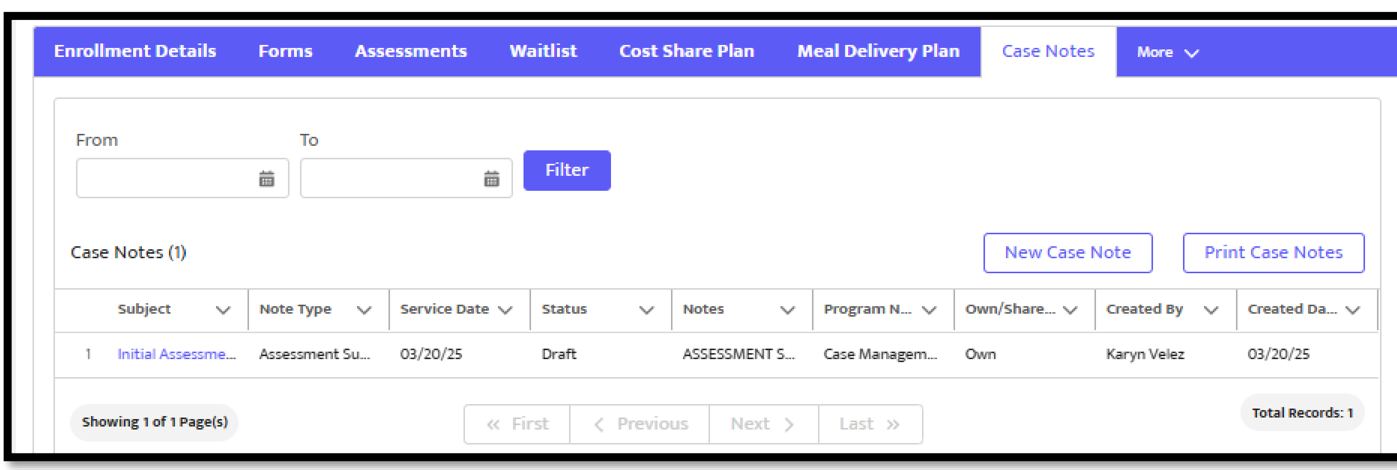
Step 1: On **Enrollment Details Menu** select the **Case Notes** tab. If you do not see the tab, select **More** and choose **Case Notes** from the dropdown menu. The **Case Notes** List View provides the ability to add notes, print notes and find specific notes using the **Filter** button.



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**.

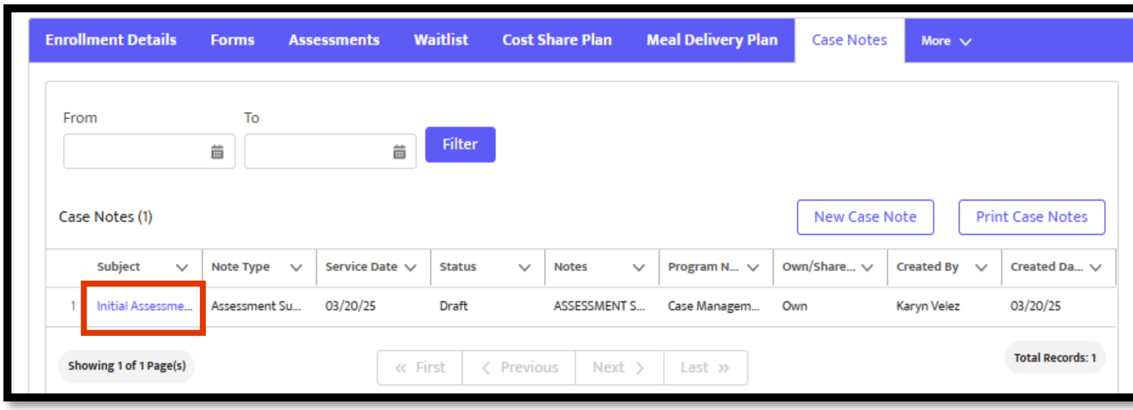


You return to the **Case Notes** List View where pertinent information about the note is displayed such as its **Status** and if it has been shared with other programs or only accessible by your program. The note remains in **Draft** status until it is either determined **Final** or **Inactive**.

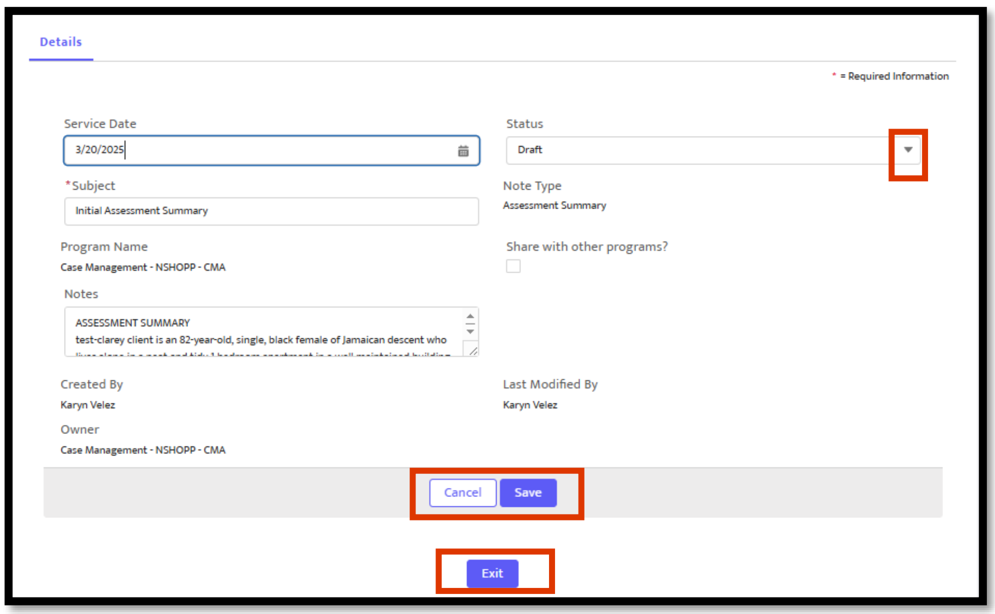


Editing a Case Note

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.

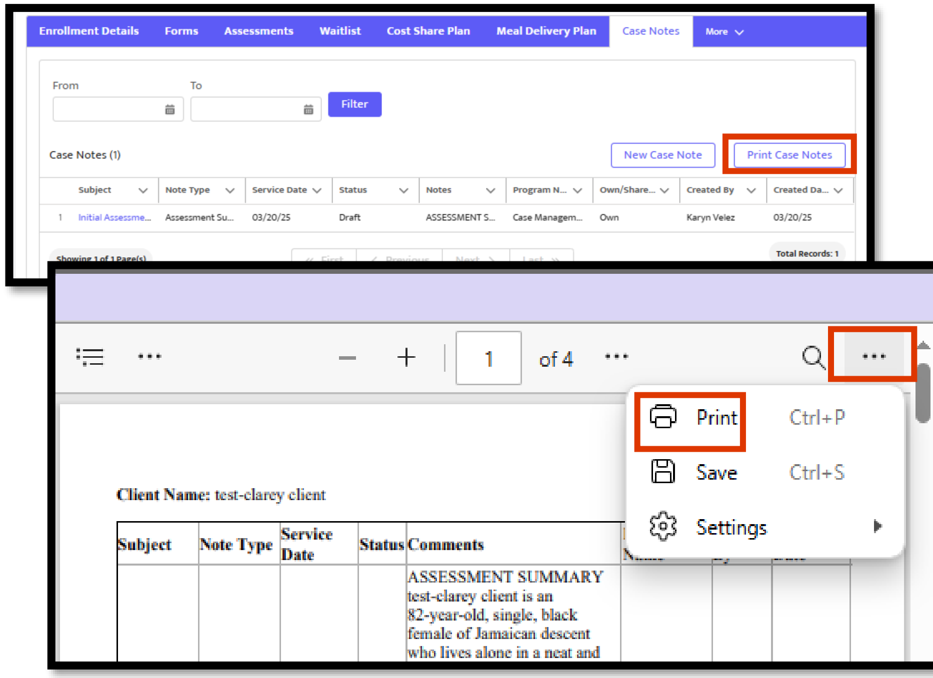


Step 2: Select any pencil icon. The **Details** form displays dropdown menus and text fields that can be edited. The **Cancel, Exit** and **Save** buttons also display. Selecting **Cancel** removes you from the editable form and brings you back to the original **Details** note form. **Exit** returns 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.



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

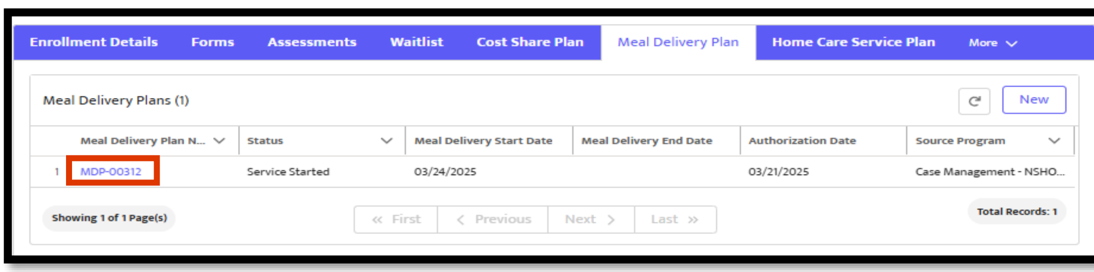
Discussion of how to create an initial **Meal Delivery Plan** can be found in the **CMA/HDM Intake/*PEC* Meal** section of this guide

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**:

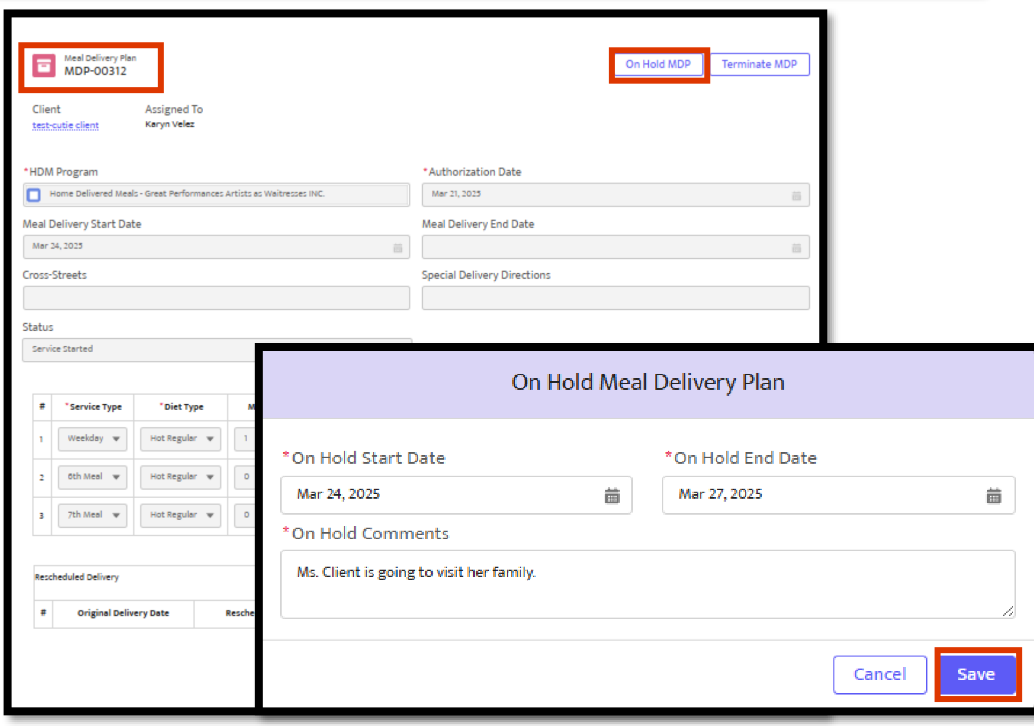
Step 1: Click the **Meal Delivery Plan** tab on **Enrollment Details Menu**. Click the **Meal Delivery Name** link.



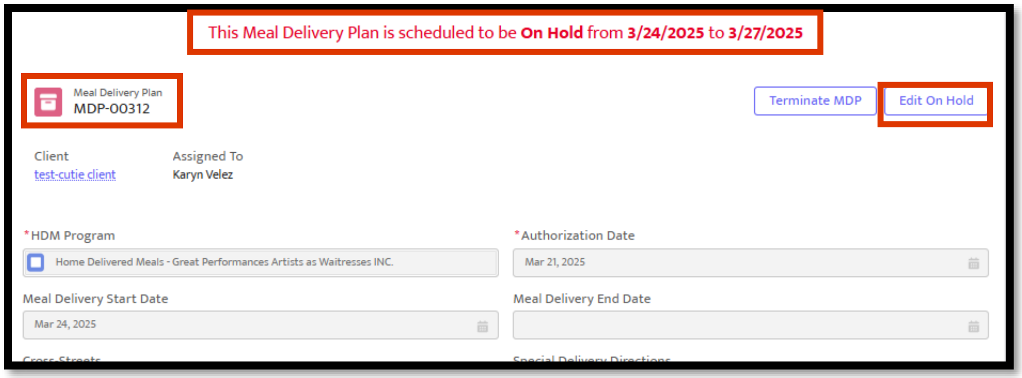
Step 2: On the **Meal Delivery Plan** details, select **On Hold MDP** from the upper right corner.

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.



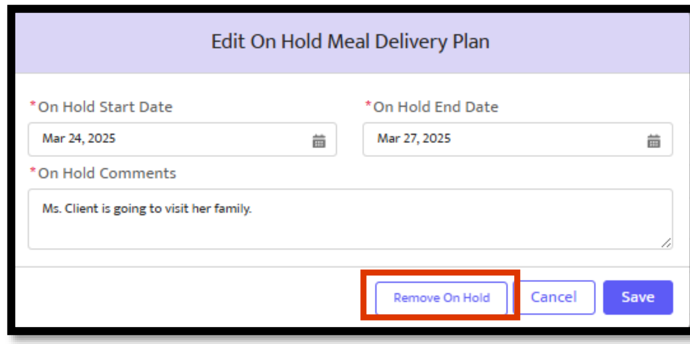
The service plan form now has an **Edit on Hold** button available. The On Hold request can be edited any time before or during the requested timeframe by selecting the **Edit on Hold** button.

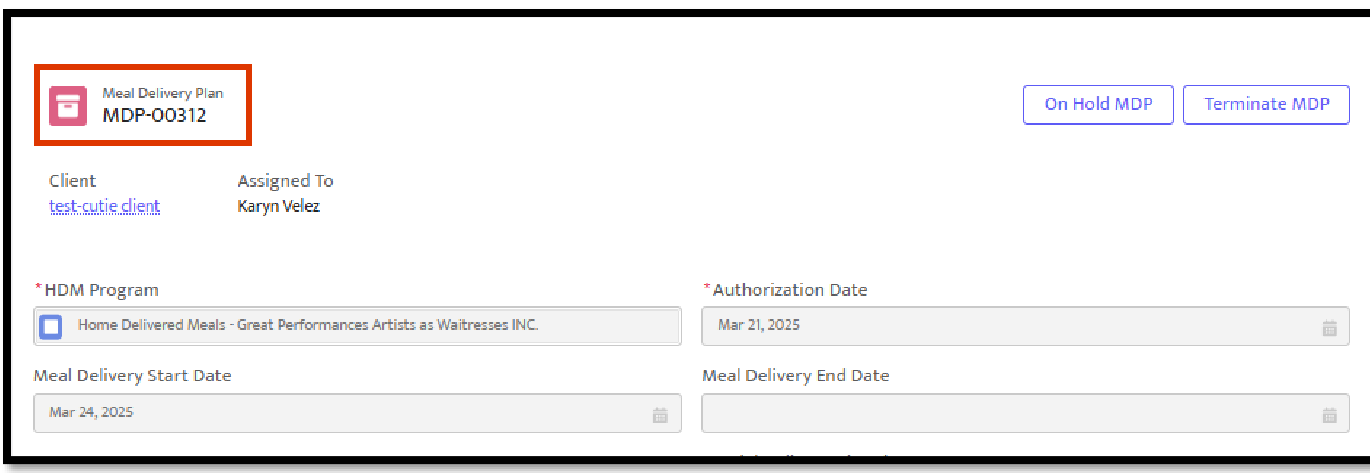


Editing an On Hold Request

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

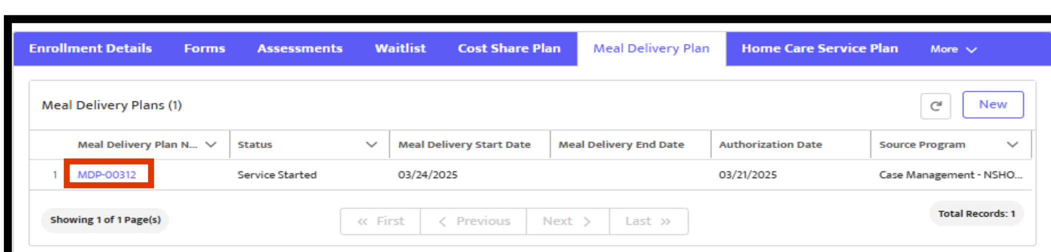
Step 2: From the **Edit On Hold Meal Delivery Plan** pop-up, make edits, then select **Save**. If the request needs to be cancelled prior to the start date, select the **Remove on Hold** button. You return to the **Meal Delivery Plan** form where the On Hold request notification is now removed and the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





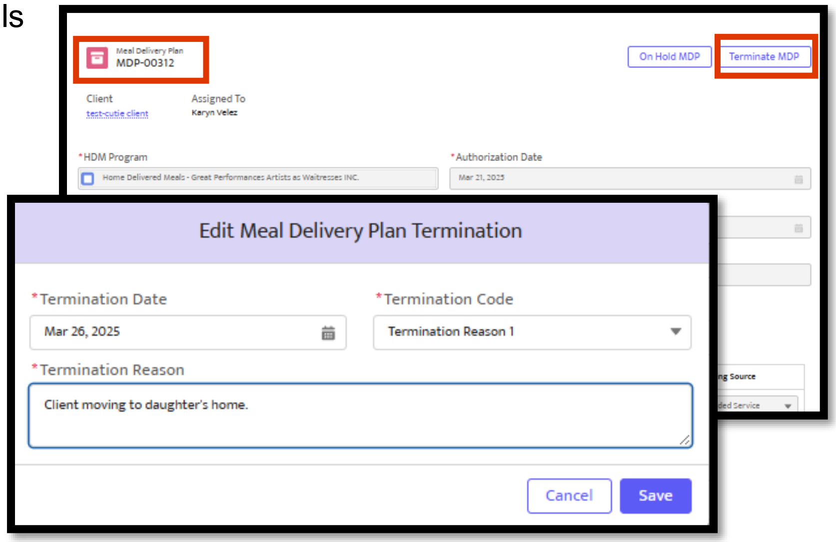
Terminating a Meal Delivery Plan

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

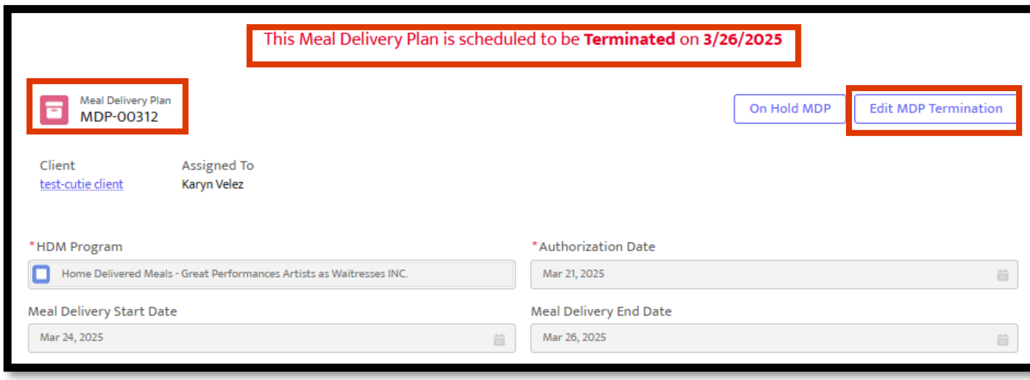


Step 2: From the **Meal Delivery Plan** details page, select **Terminate MDP.**

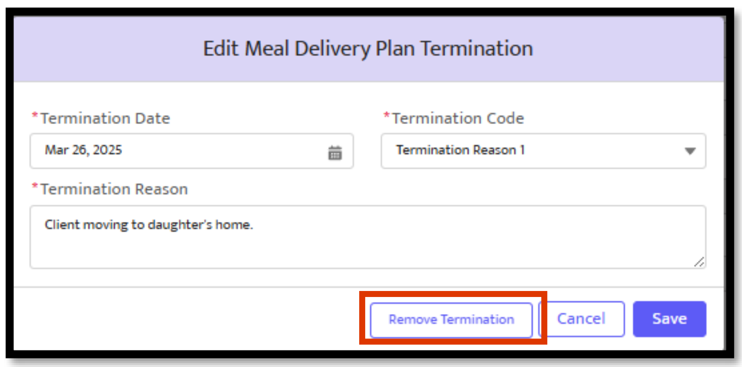
Step 3: From the **Edit Meal Delivery Plan Termination** pop-up enter a future termination date, pick a **Termination Code**, and enter a **Termination Reason** before selecting **Save**.



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 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**.

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.

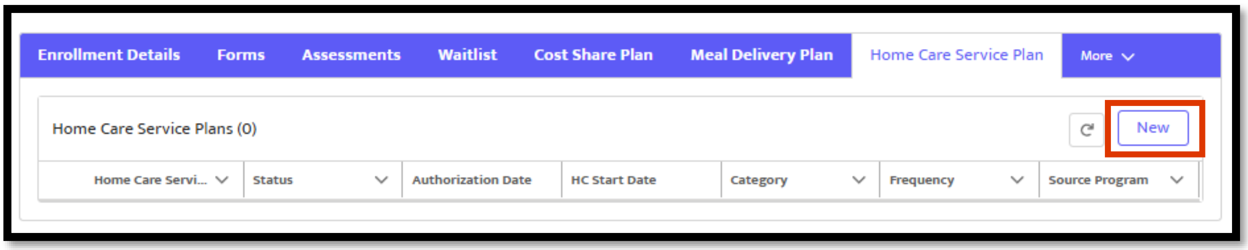
If a termination occurs and the client would like to resume services, a new **Meal Delivery Plan** and referral would need to be created.

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.

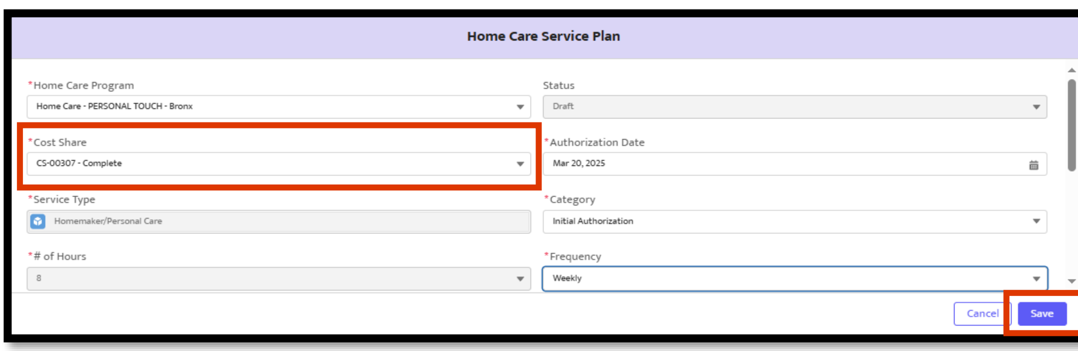
Initial Activation of Home Care Service Plan

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



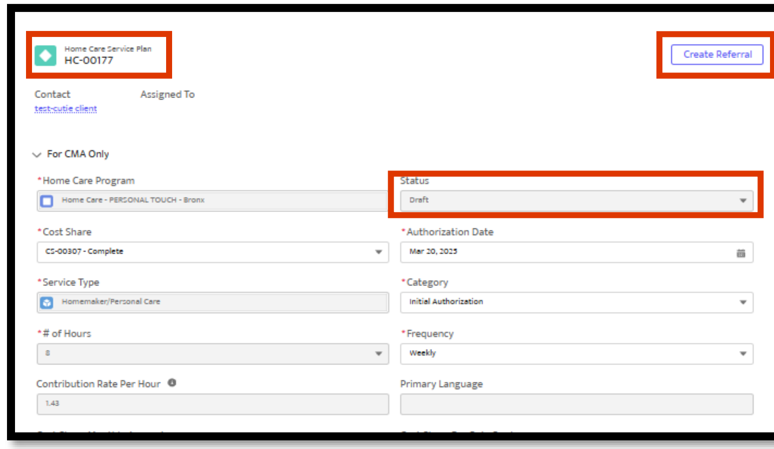
NOTE: *If New is selected and a Cost Share Plan is not completed, an error notification appears prompting you to first complete the cost share before creating a service plan for home care.*

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 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.*

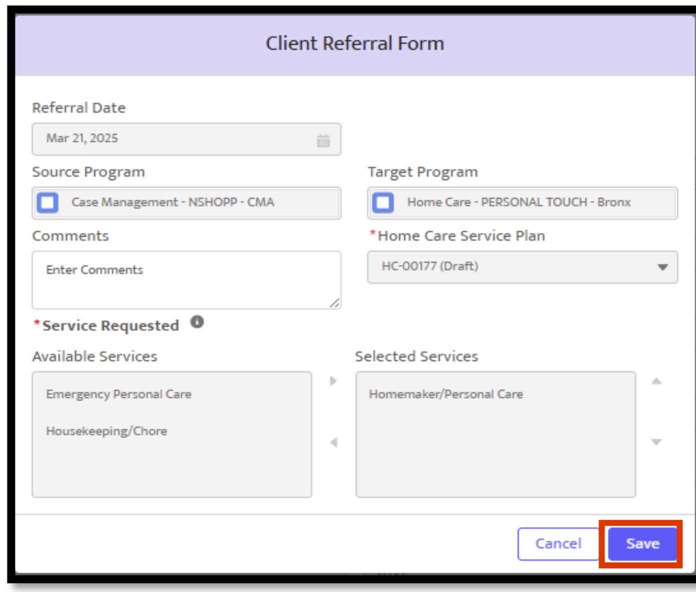
Referring Home Care Service



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.

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 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**.

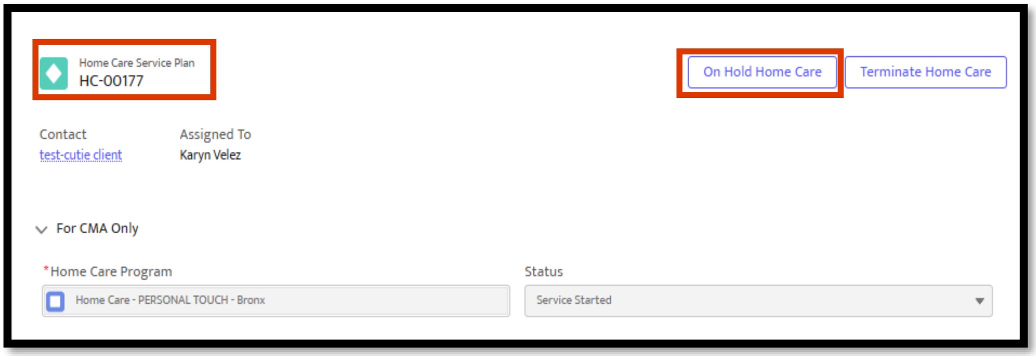
TIP: *To confirm that your referral was sent, check the **Referral Queue** with the filter **Referrals Shared by my Program**. See above instructions: Best Practice, Confirm Referral is Sent*

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**:

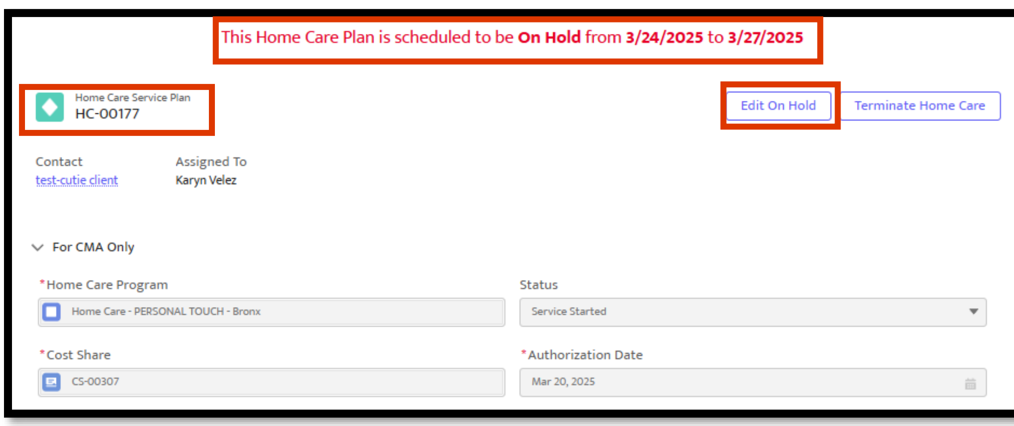
Step 1: From the **Enrollment Details** menu, click the **Home Care Service Plan** tab, click the desired **Home Care Service Plan ID** link.

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**.



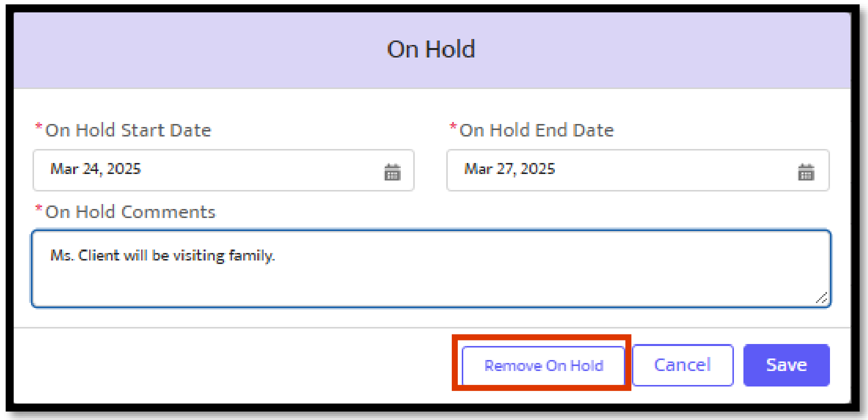
Step 3: The **On Hold** pop-up displays. Complete all required fields and select **Save.** You return to the service plan where the requested dates are displayed. VIVÉ automatically sends an email to the home care provider alerting them to the request.

The 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.



Editing an On Hold Request

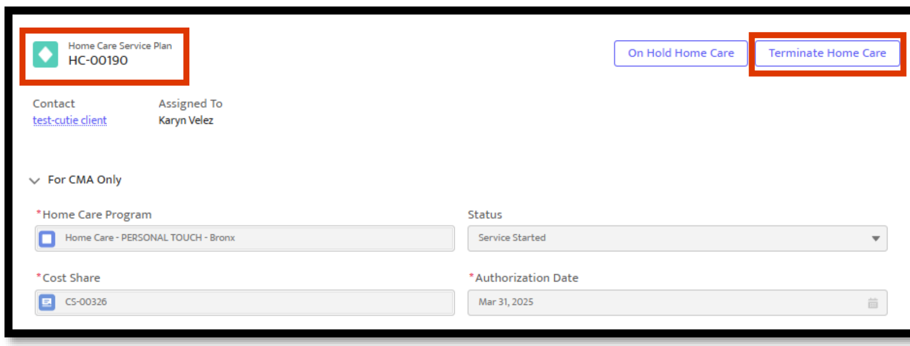
Step 1: Select **Edit on Hold** to open the **On Hold** pop-up. Edits can be made to any of the required fields before selecting **Save**.



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.

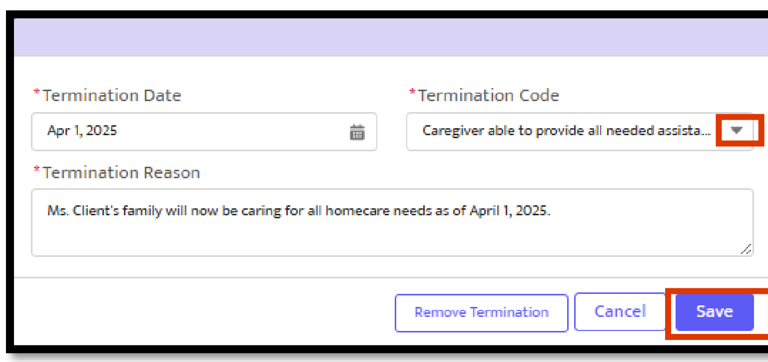
Terminating Home Care Services

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

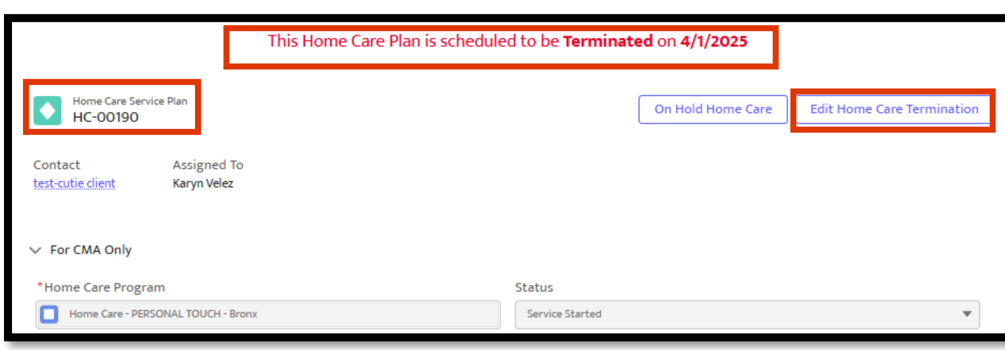


Step 2: On the **Home Care Service Plan** details page select **Terminate Home Care**.

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

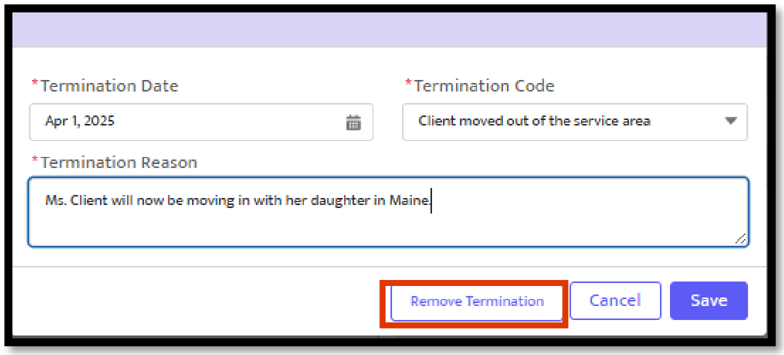


You return to the service plan where the termination date is displayed. VIVÉ automatically sends an email to the home care provider alerting them to the termination. The service plan form now has an **Edit Home Care Termination** button available.



Edit Home Care Termination

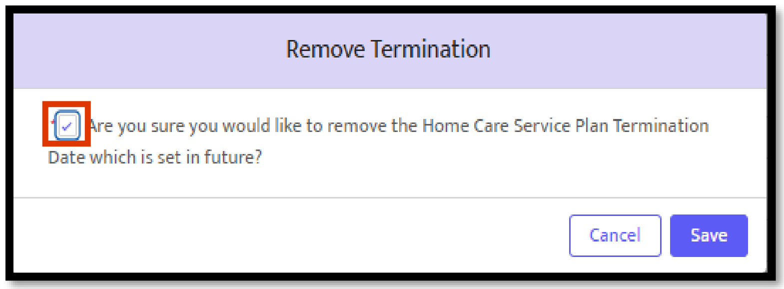
The termination request can be edited any time before the stated date of termination.



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.

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****.*

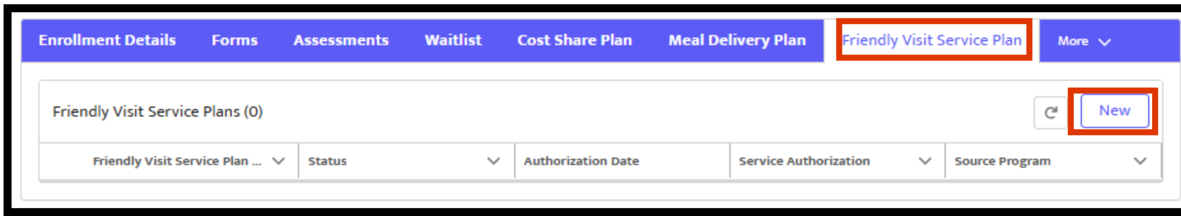
Friendly Visiting Service Plan

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

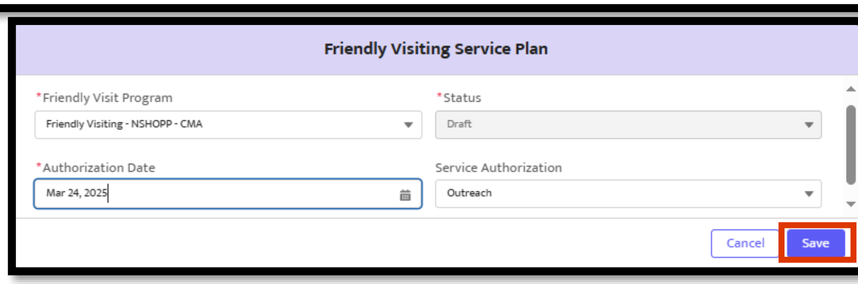
NOTE: *Referrals for friendly visiting services must* ***only*** *be sent via the* ***Referrals*** *tab on the* ***Enrollment*** *level. Referrals sent from the "Client Profile" level do not generate the Friendly Visiting Service Plan needed by the friendly visiting program to provide services to the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



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

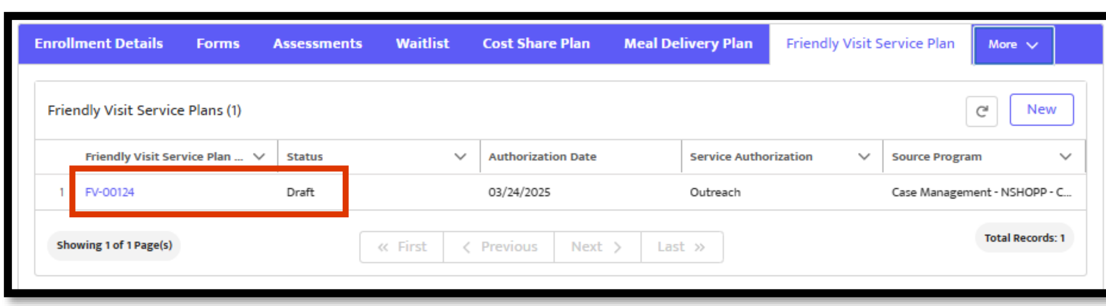


You return to the **Friendly Visiting Service Plan** List View where pertinent information displays, including the status of **Draft**.

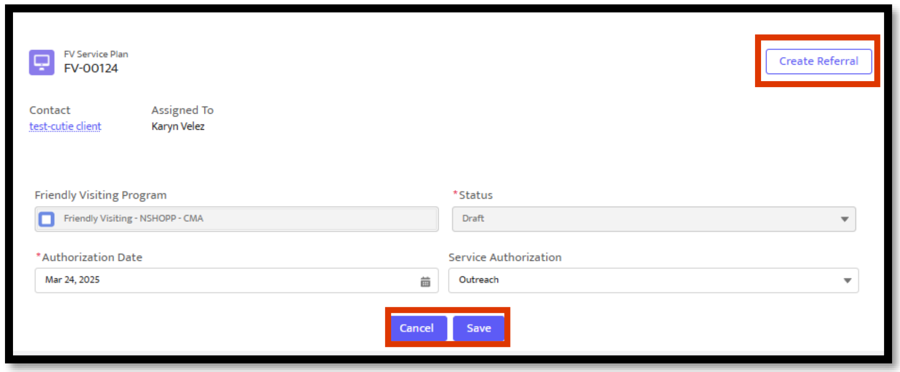
NOTE: *If a Consent to Share/Refer is not completed, the system prompts you to complete one prior to saving. You return to the Referrals list view where the referral is noted as sent. The system automatically sends an email to the friendly visiting program regarding the request.*

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.



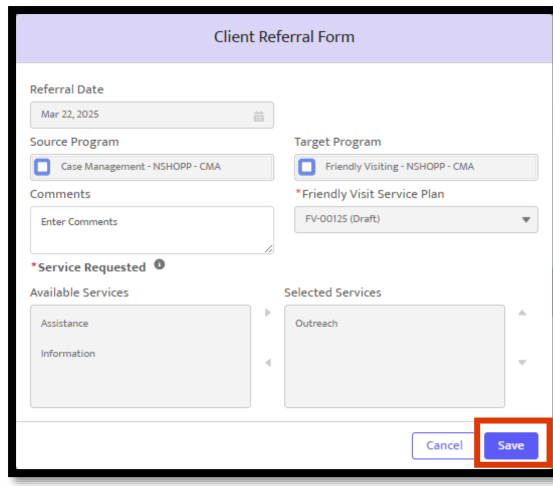
Step 2: The draft plan, which is editable, displays **Cancel**, **Save** and **Create Referral** buttons. Selecting **Cancel** brings you back to the List View. You select **Save** only if you have made edits to the form and are not ready to send the referral. This action also returns you to the List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



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**.

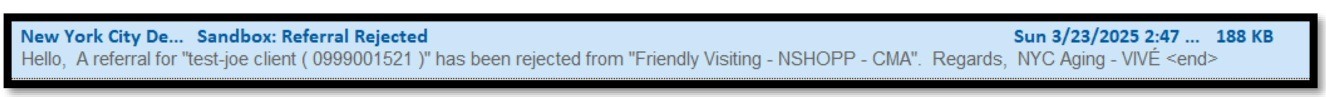
NOTE: *If a Consent to Share/Refer is not completed, the system prompts you to complete one prior to saving.*

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



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.



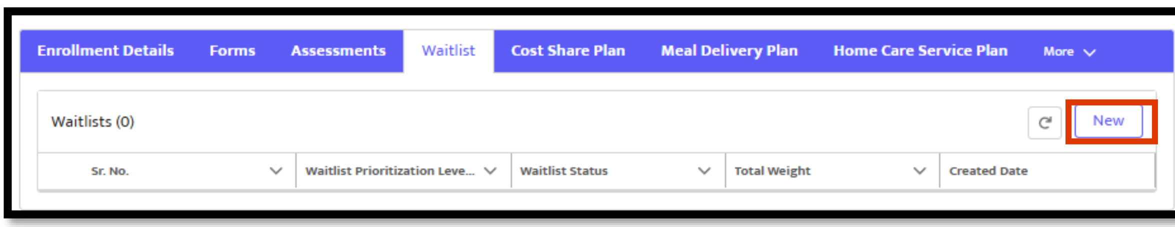
NOTE: *Once the Friendly Visiting Service Plan is accepted and starts service for the client, you cannot place the service on hold or terminate the service. Those actions now become the responsibility of the friendly visiting program. Therefore, if you go to the Friendly Visiting Service Plan form for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

Other Program Actions

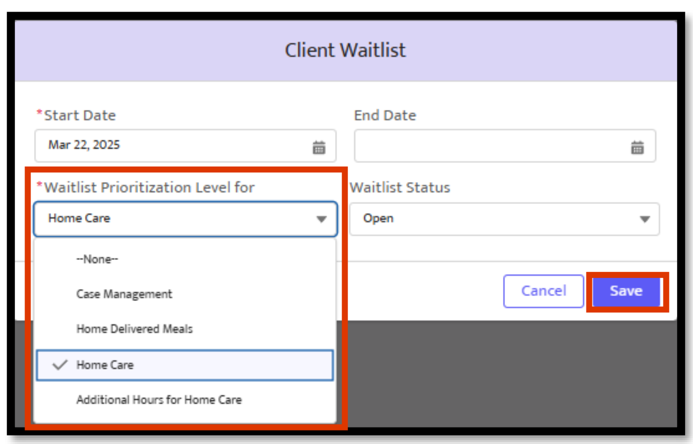
Waitlist

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.

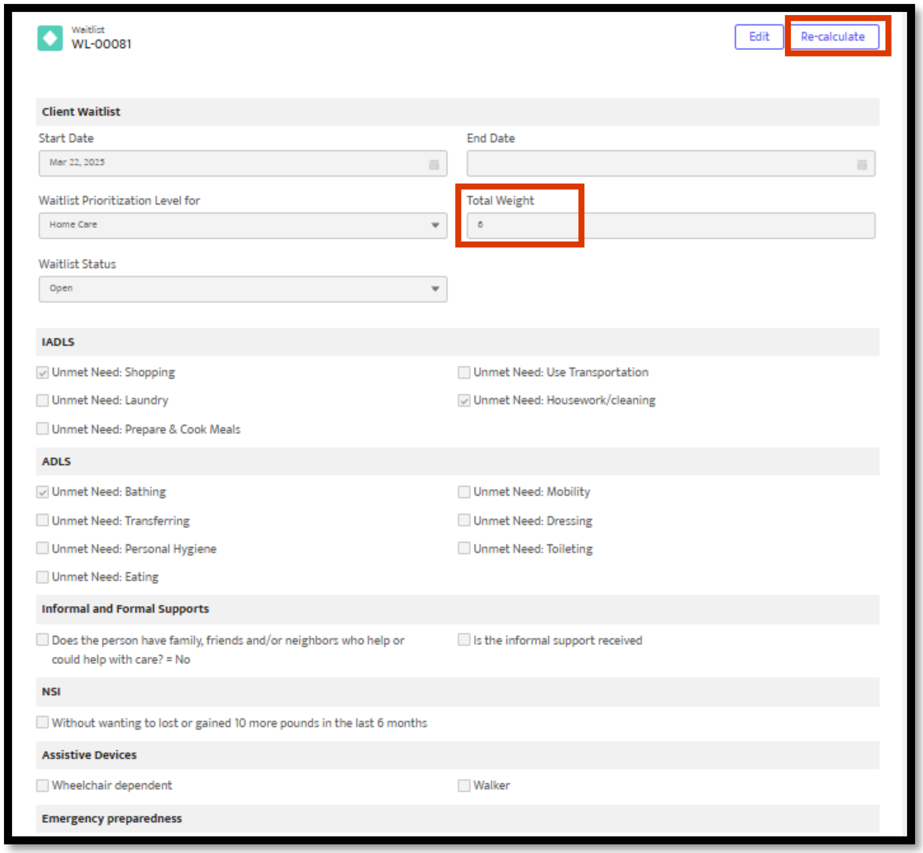


Step 2: The **Client Waitlist** pop-up displays. Pick the service that the client is waiting for from the **Waitlist Prioritization Level** dropdown menu. Confirm that all required fields are completed before selecting **Save**.



The **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.



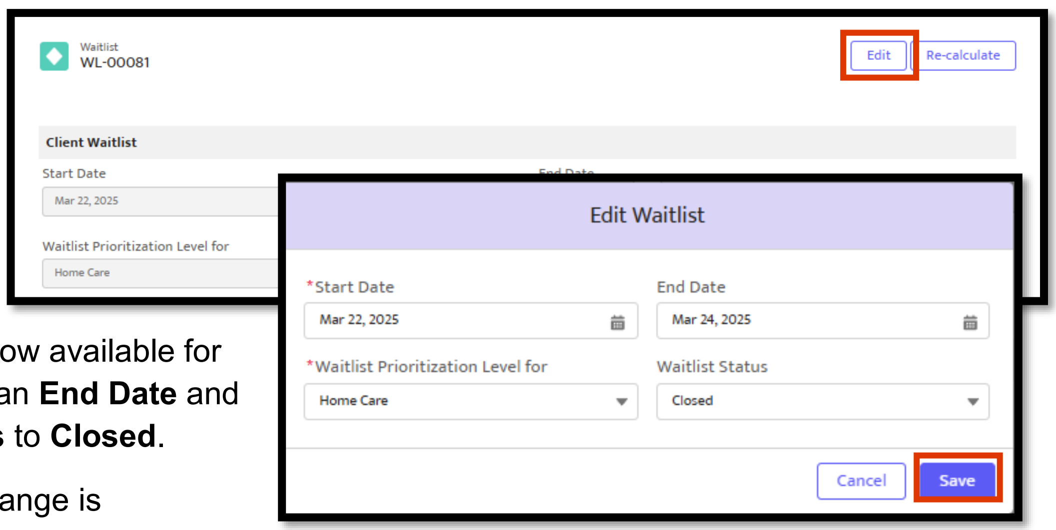
Step 3: Select **Re-calculate** for the client's waiting list score. Select **Exit** to return to the **Waitlist** List View which displays information about the client's waiting list status.

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**.

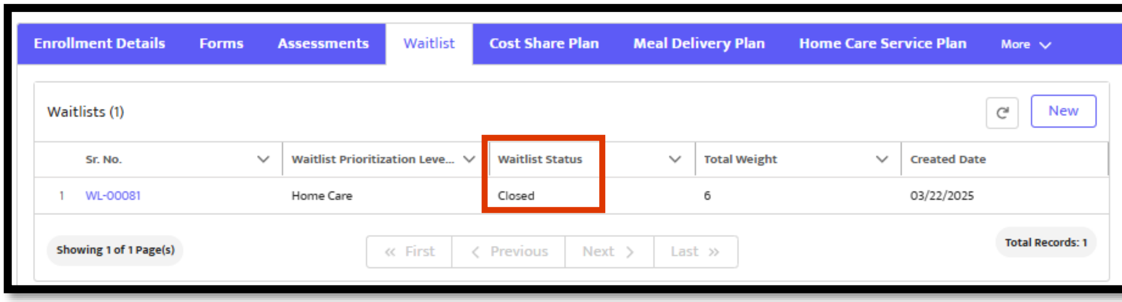
Step 3: On the **Edit Waitlist** pop-up make all necessary edits. Select **Save**.



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**.

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



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.*

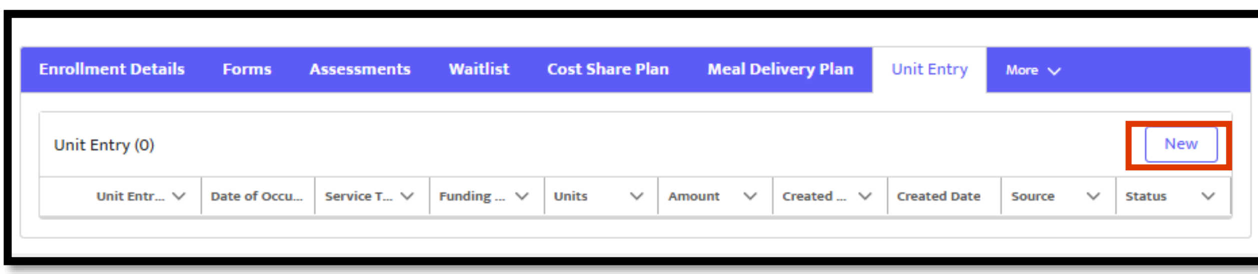
Unit Entry

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**.

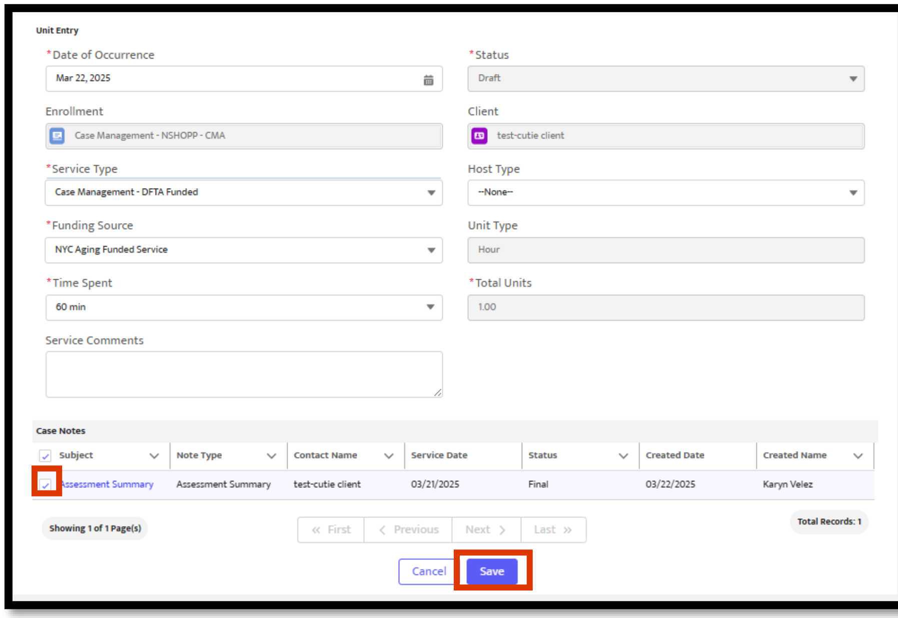


Step 2: The **Unit Entry** form appears. On the top portion of the form, complete all required fields.

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.

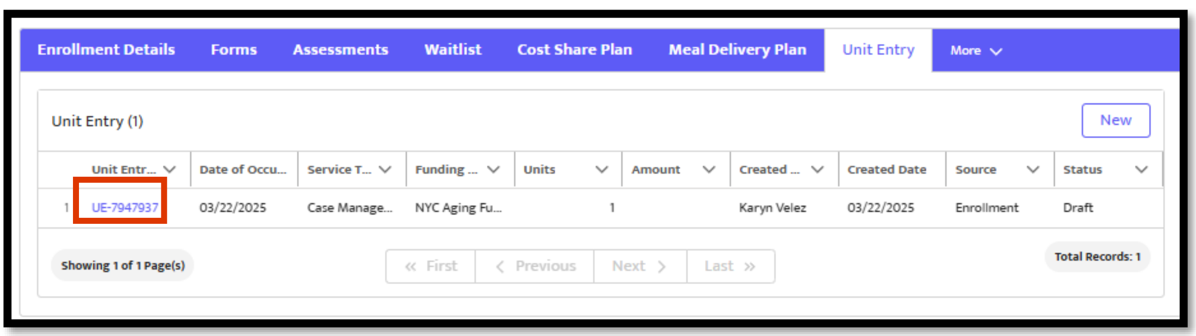
Select the checkbox for the note that pertains to this unit and select **Save**.



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

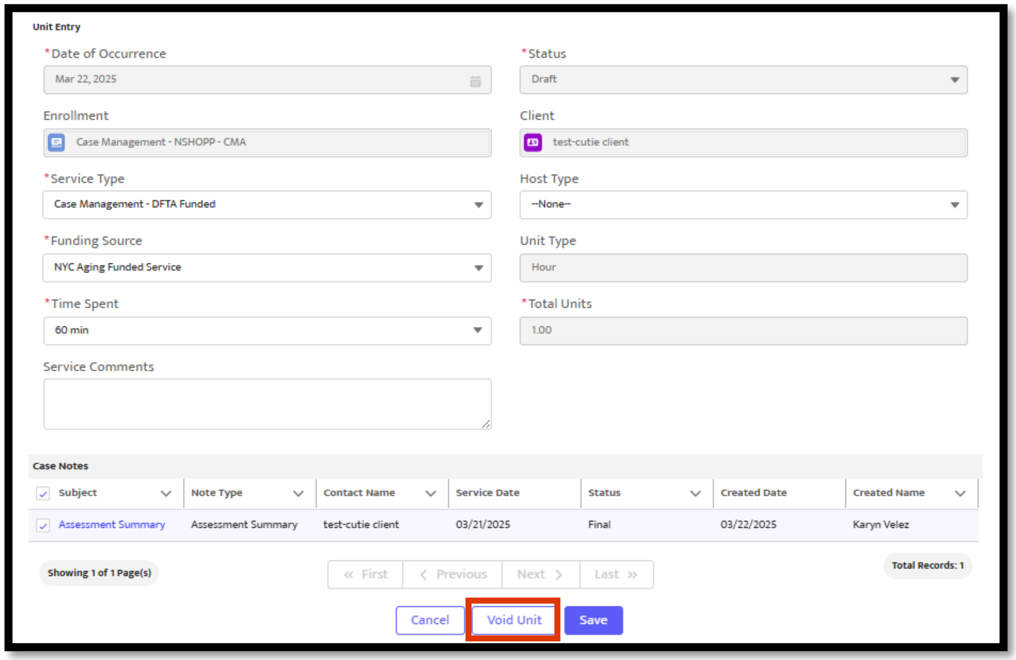
Step 1: From the **Enrollment Details Menu**, click on the **Unit Entry** tab. Click the desired **Unit Entry Number** link.



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.



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:

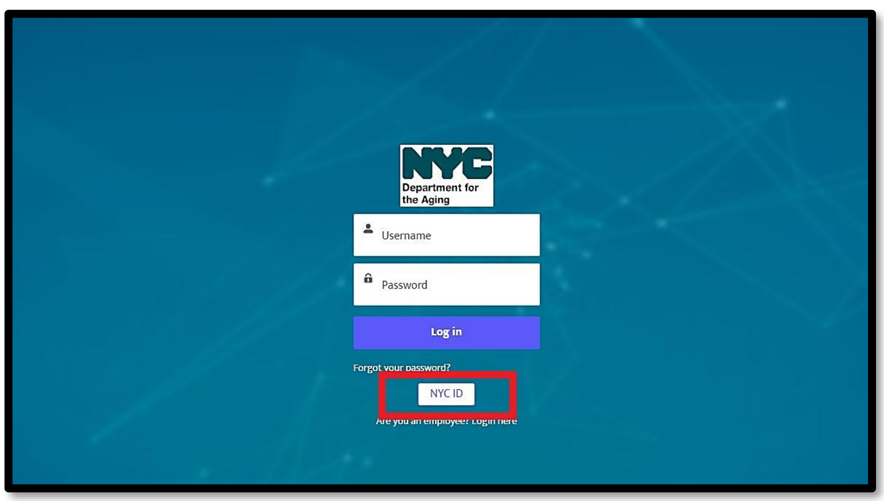
- Logging into VIVÉ
- Accessing NYC.ID

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.*



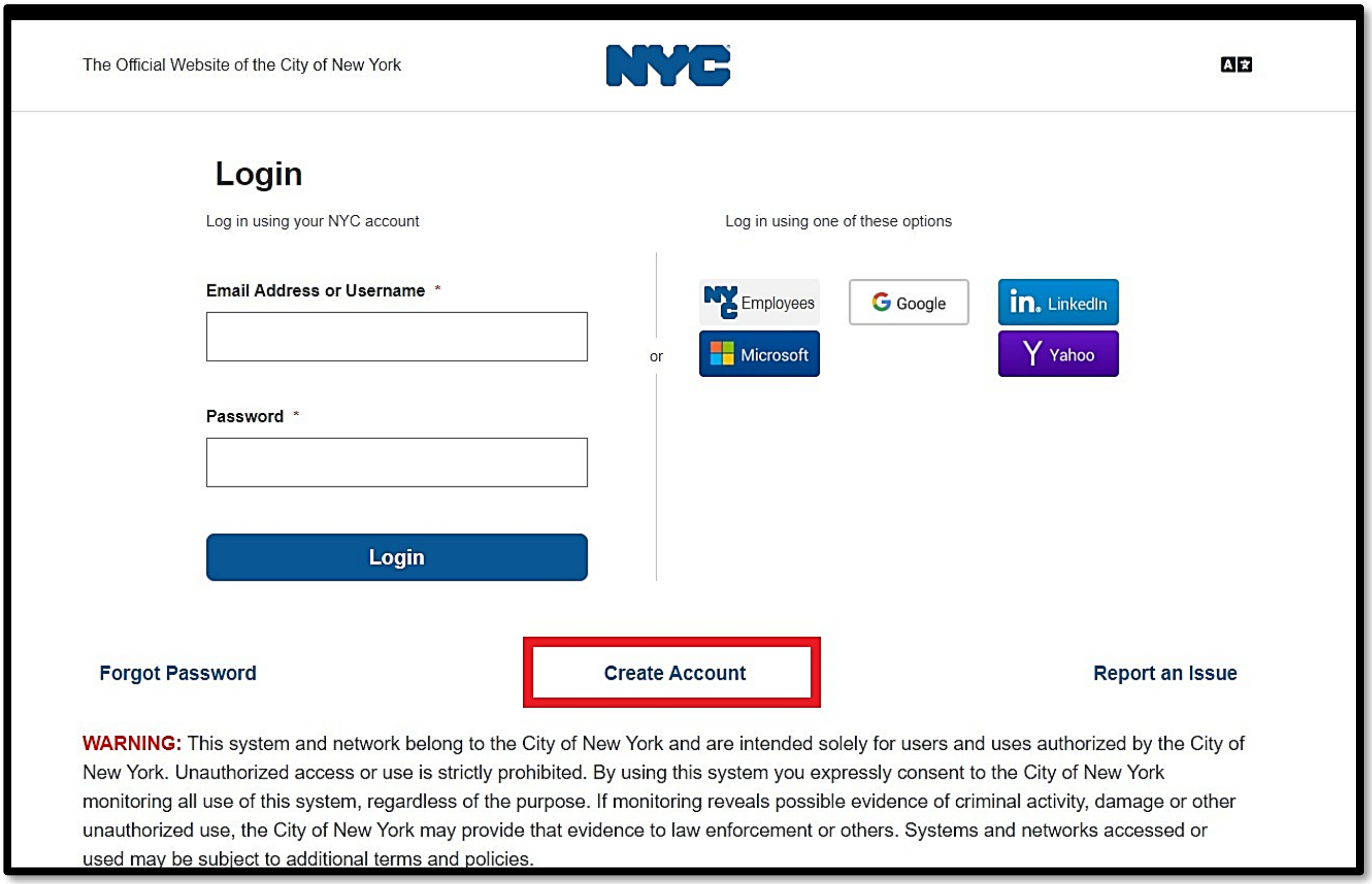
Accessing NYC.ID

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.



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:

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.

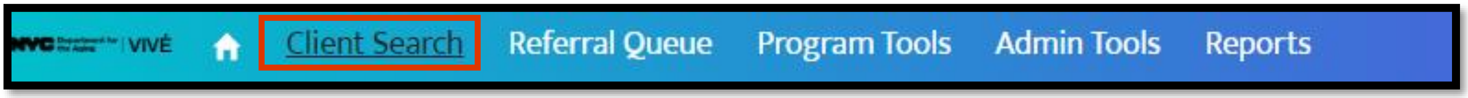
NOTE: ***DO NOT ENTER ANYONYMOUS CLIENTS*** *as anonymous clients are not permitted. All client records must include identifying information. If the person's information is not available, you may still record the unit in the Event Profile—consult the VIVÉ Reference Guide: Event.*

Client Search

Beginning Your **Client Search**

[*VIVÉ Knowledge Base – Client Search*]

From the dashboard, click Client Search.

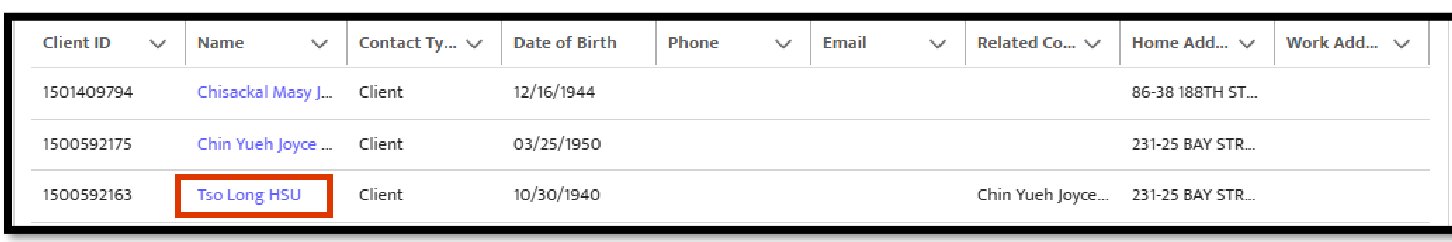


Indicate if you are searching for a Client, a Contact, or a Professional by checking the box.

To begin the client search you can either:

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

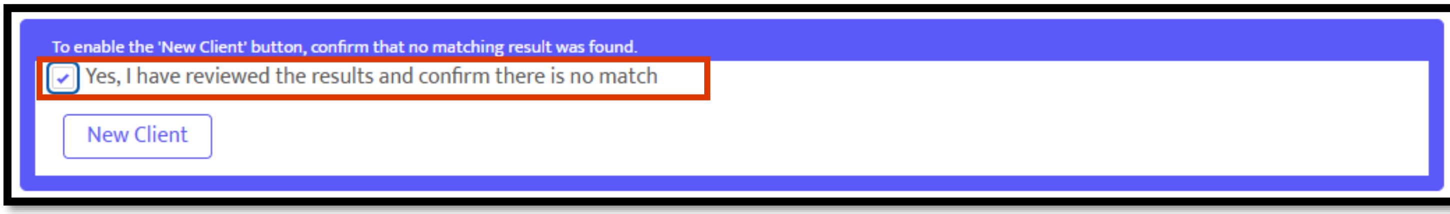
If the person you are looking for is on the list, click on the client's name. This opens the client's profile.



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...	

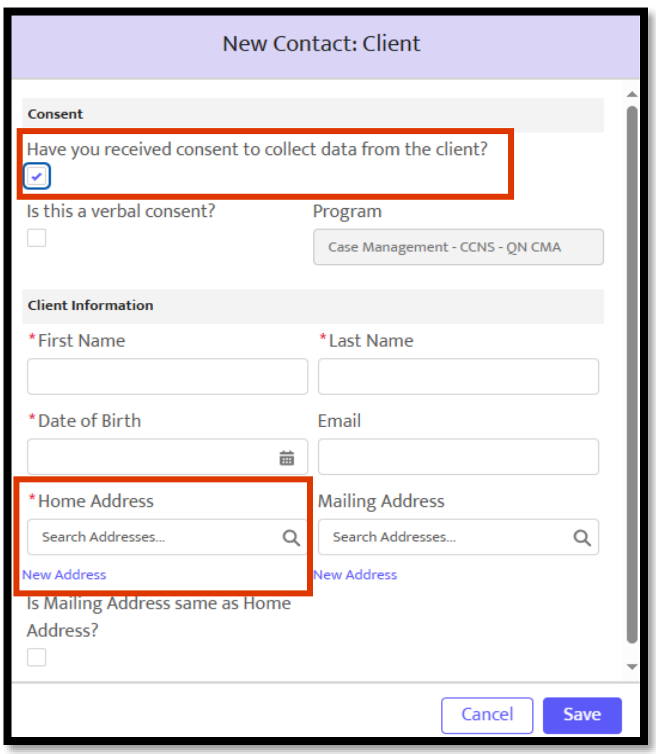
If the person is not on the list, check the box at the bottom of the page to confirm you have reviewed the results and there is no match. Then click the **New Client** button, to start the new client data entry process.

[VIVÉ Knowledge Base – Client Search]



New Client Entry

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



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

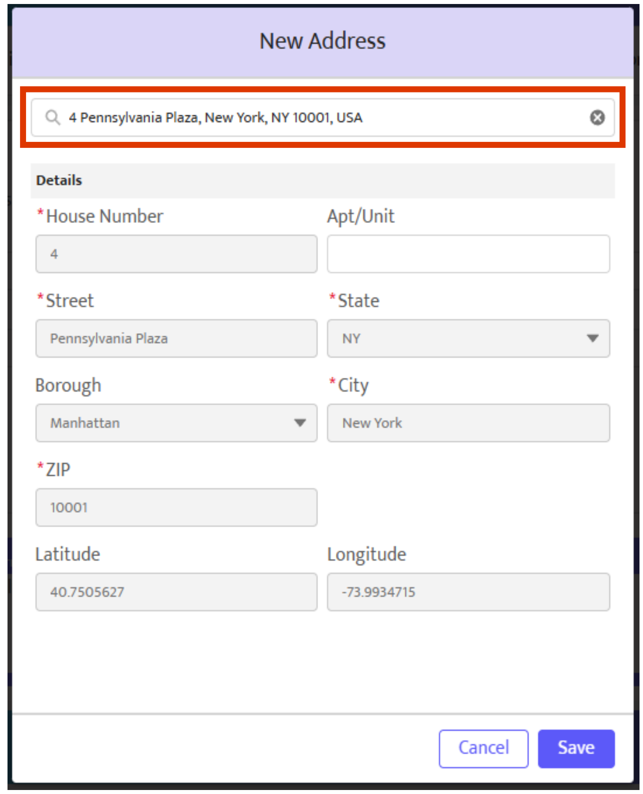
To find addresses, there is a search box for the Home Address. Enter an address and if it was previously entered,then you can select it. Please note the address including the apartment number must match.

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.

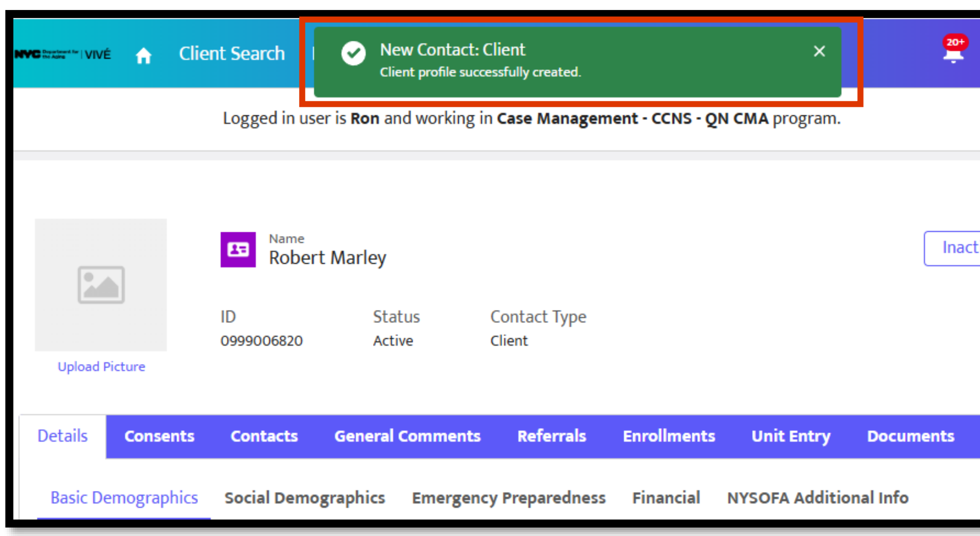
Once you've selected the address, the remaining fields will be populated. **You will need to add the Apt/Unit field.**

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:

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:

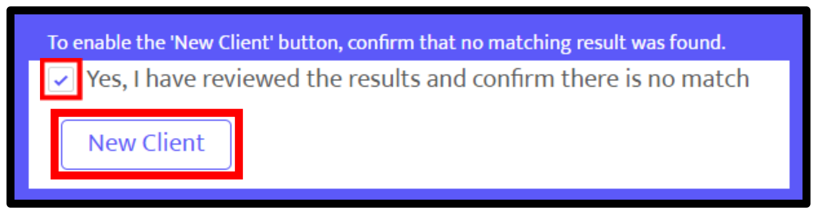
Accessing, updating, or editing information on a client with an existing profile in VIVÉ (e.g. a new client with your program who is/was a client of another NYC Aging-funded program).

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**.

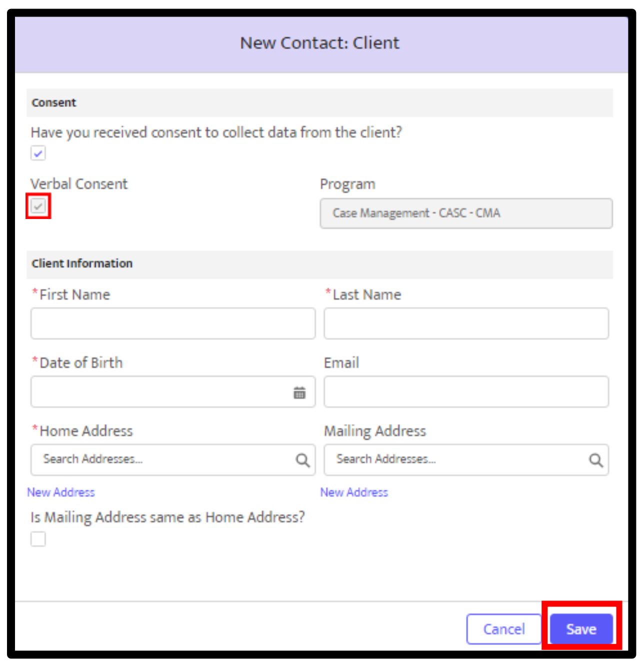


Step 3: In the **New Contact: Client** pop-up window you must first indicate that you have received consent to collect data from your client by checking the box.

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

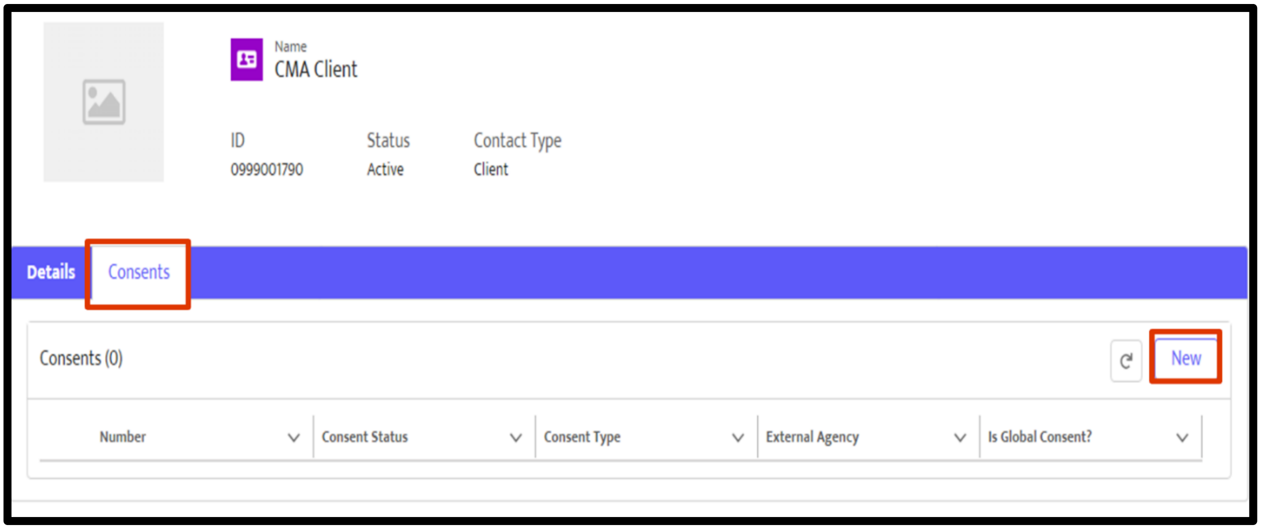
The intelligent search of VIVÉ returns robust results. When you click on a client's name who is not yet your client, you will need first need to obtain their consent to view their record.

VIVÉ Knowledge Base – Consent

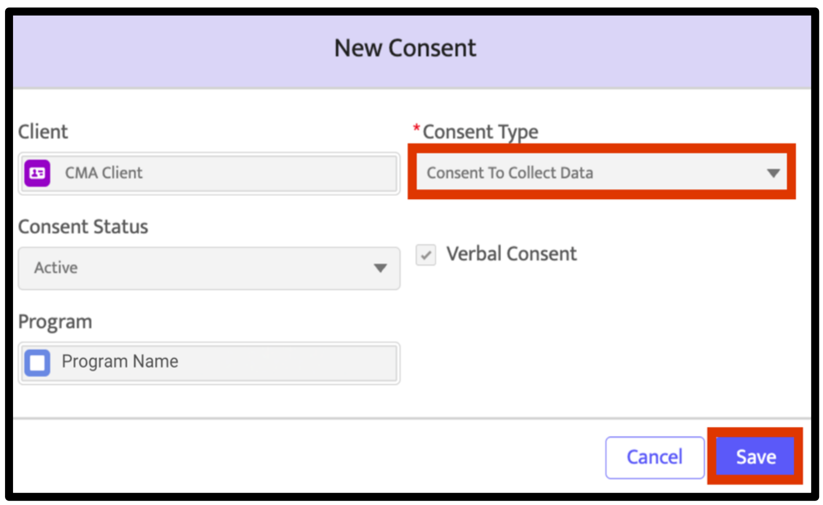
Step 1: Click on **Client Search** from the **Top Level Menu** to conduct your search.

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**.



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



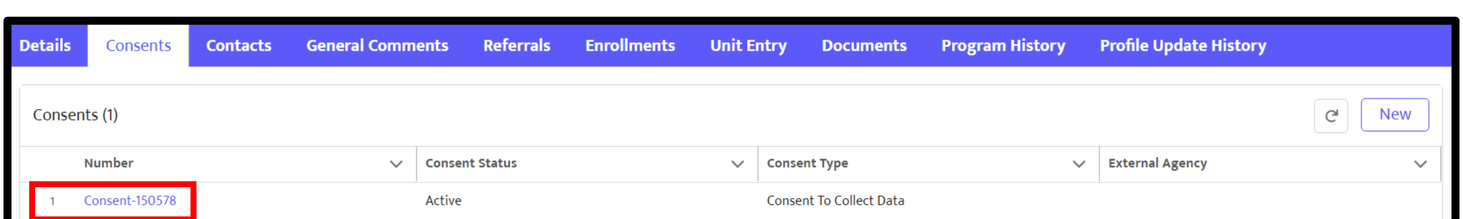
NOTE: *Verbal Consent will automatically be selected. The consent status will change to Written Consent only after you have uploaded the written documentation.*

Uploading Consent Documentation

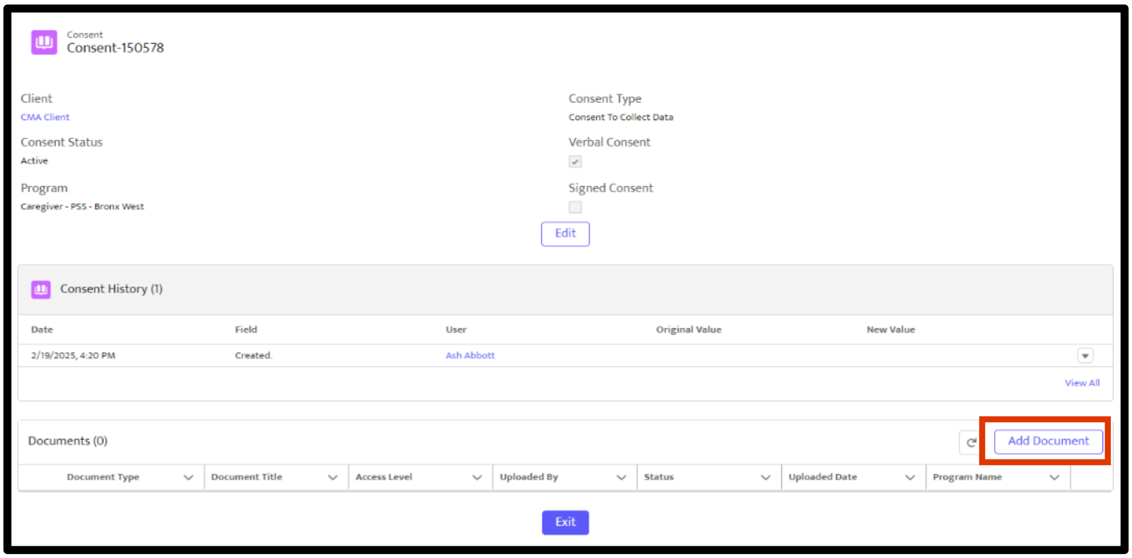
Not all programs must obtain written consent. This process illustrates the process for those that do.

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

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



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



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

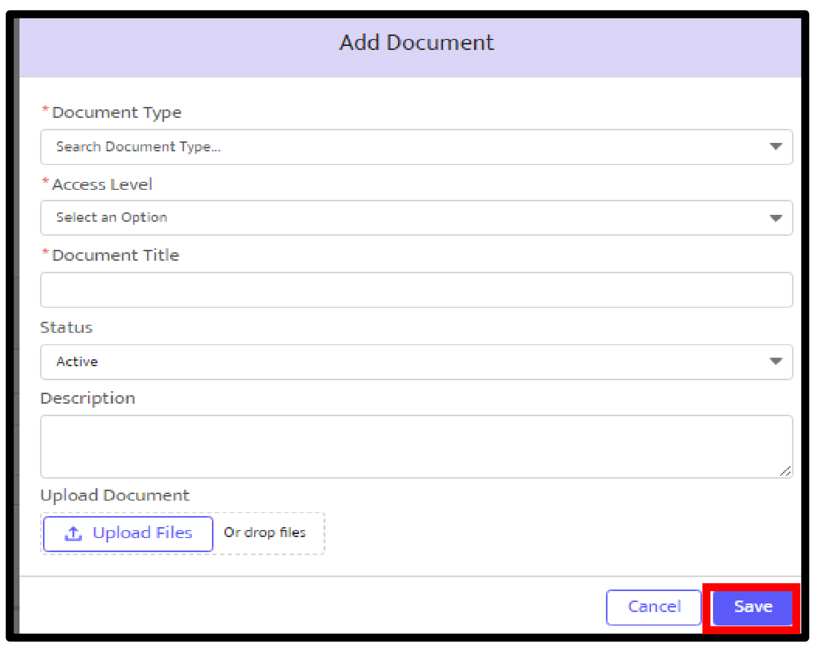
Pick an appropriate **Document Type**.

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**.



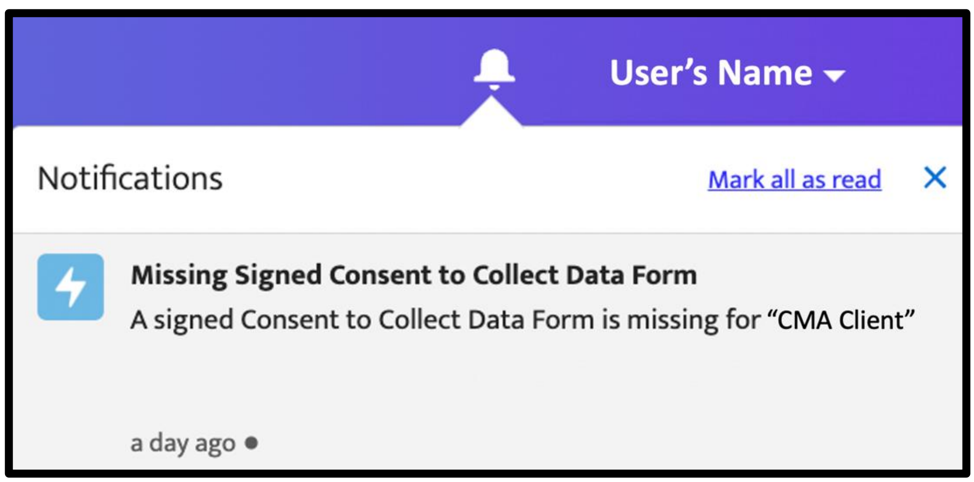
[VIVÉ Knowledge Base – Consent](#)

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

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

Consent Notifications

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

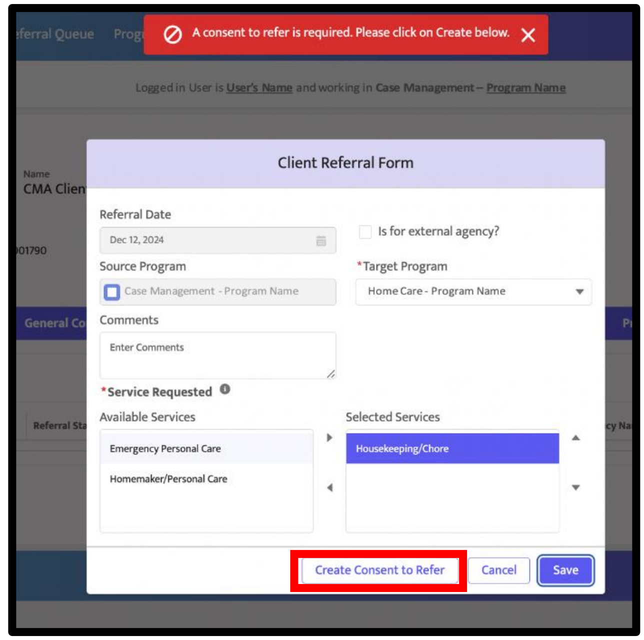


NOTE: If your program type is permitted to collect verbal consent alone (e.g. NY Connects), you will not receive these notifications.

Consent to Refer and Share

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

For more information on the Referral process.

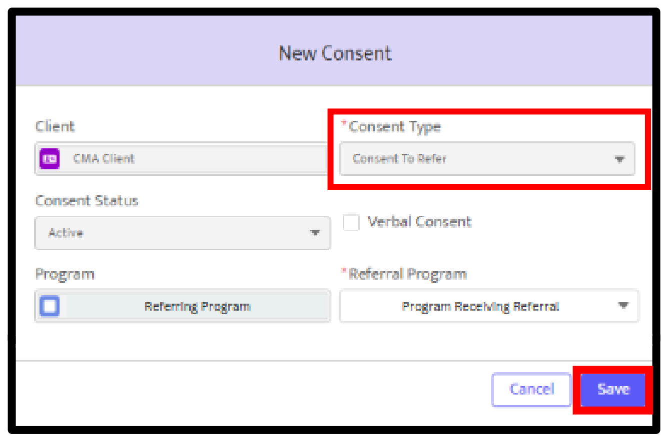


Step 2: Complete the required information in the New Consent pop-up window and click save.

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.



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.

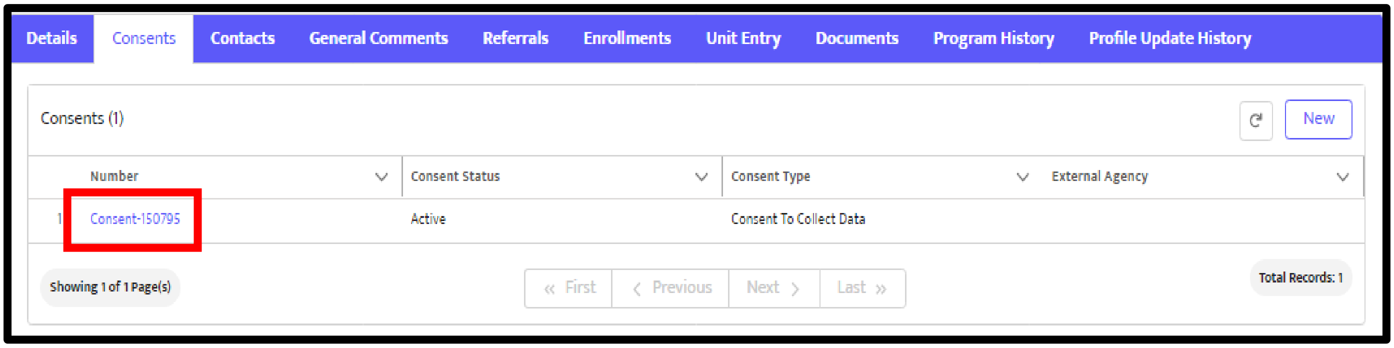
Consent Revocation

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.

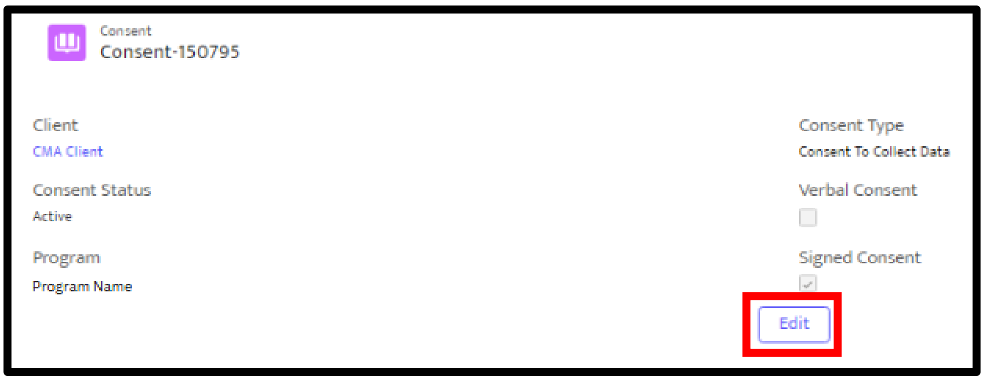
Step 1: Navigate to the **Consents** tab in their client profile

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.

VIVÉ Knowledge Base – Consent



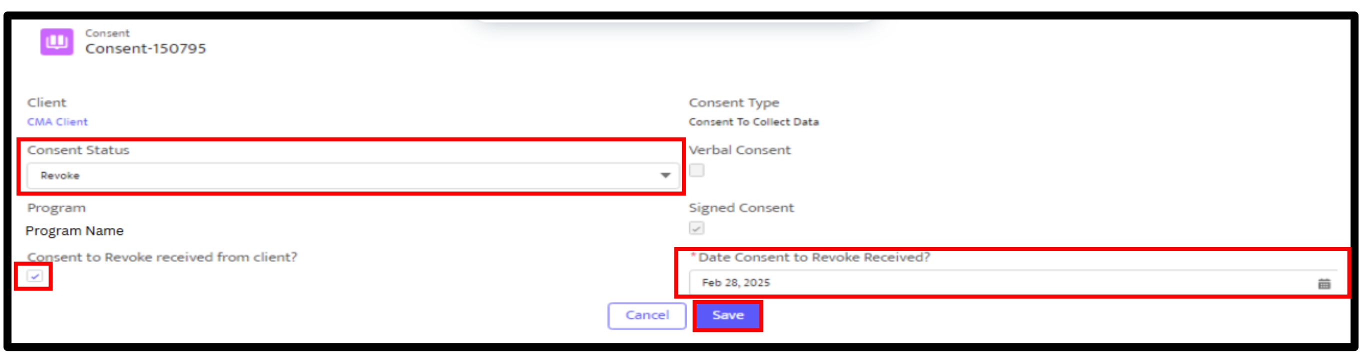
Step 3: Once in the consent record, select **Edit**



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**



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:

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.

VIVÉ Knowledge Base – Client Profile

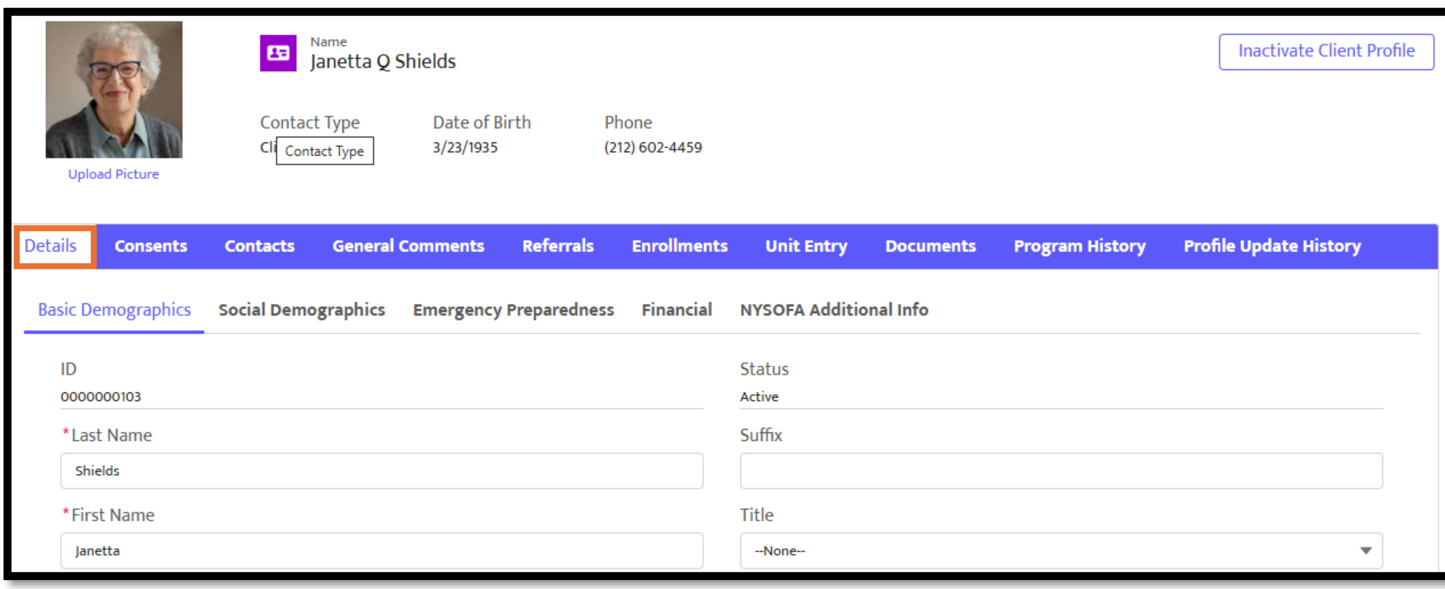
Client Profile Overview

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.



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.

VIVÉ Knowledge Base – Client Profile

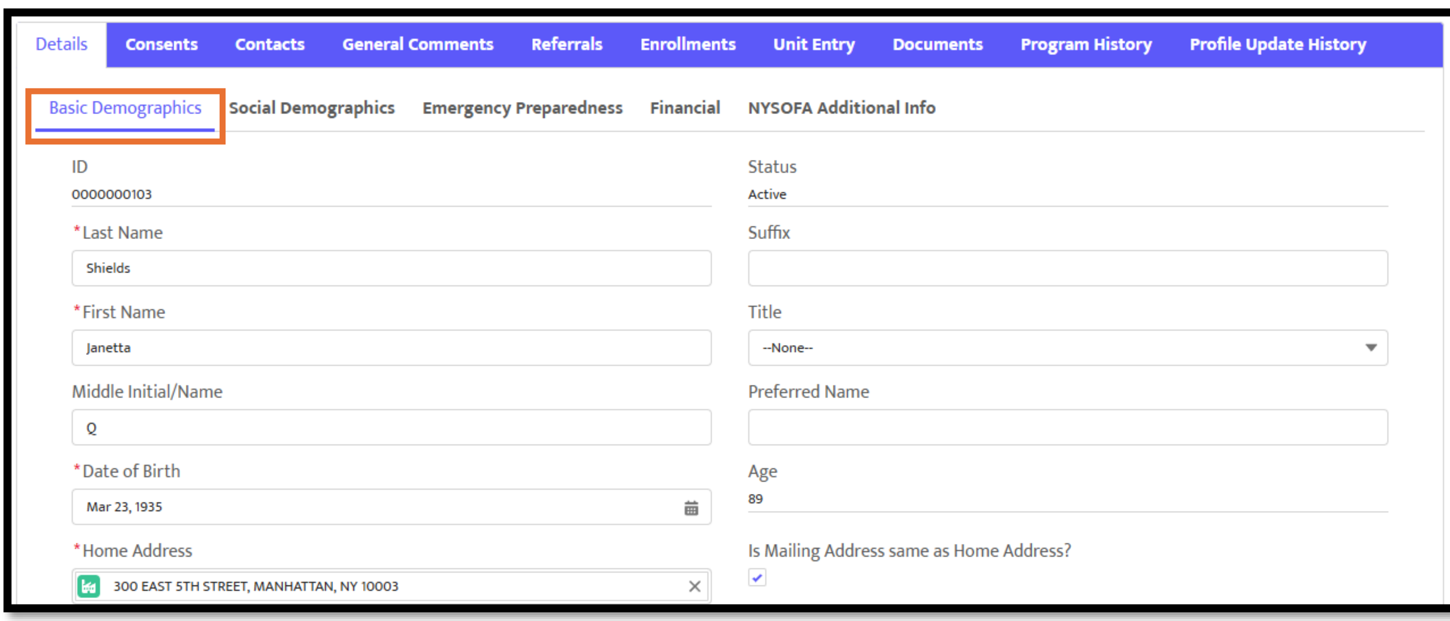
- Unit Entry – where to enter units of services offered directly to the client.
- Documents – where to upload, download, and view a list of documents
- Program History – where to see a list of programs that the client is enrolled in.
- Profile Update History – Client Details are accessible to every user of VIVÉ. This area lists the changes that anyone makes to the client's record.

Details Tab

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

Sub-Details: Basic Demographics

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

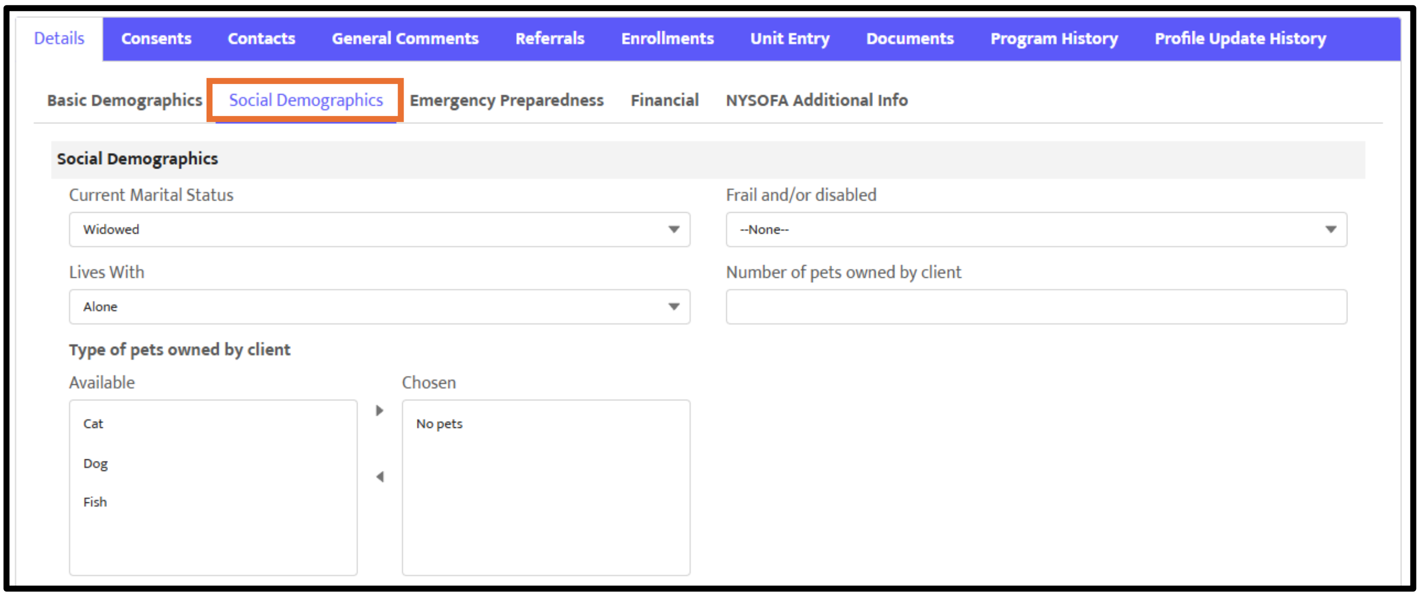


At the bottom of the **Basic Demographics** page there is the **Edit** button (or **Save** if in editing mode) and the **QR Code**. (For more information on QR Codes)

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

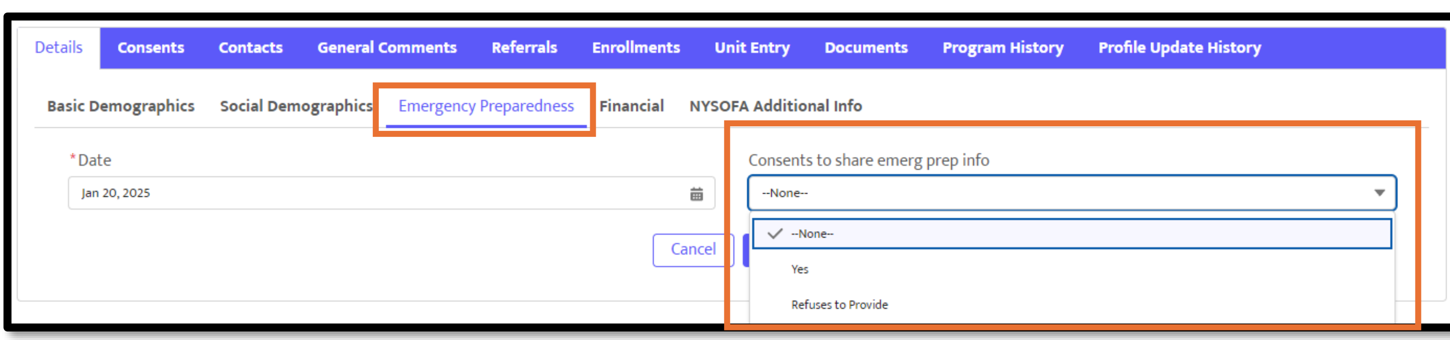
Sub-Details: Social Demographics

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



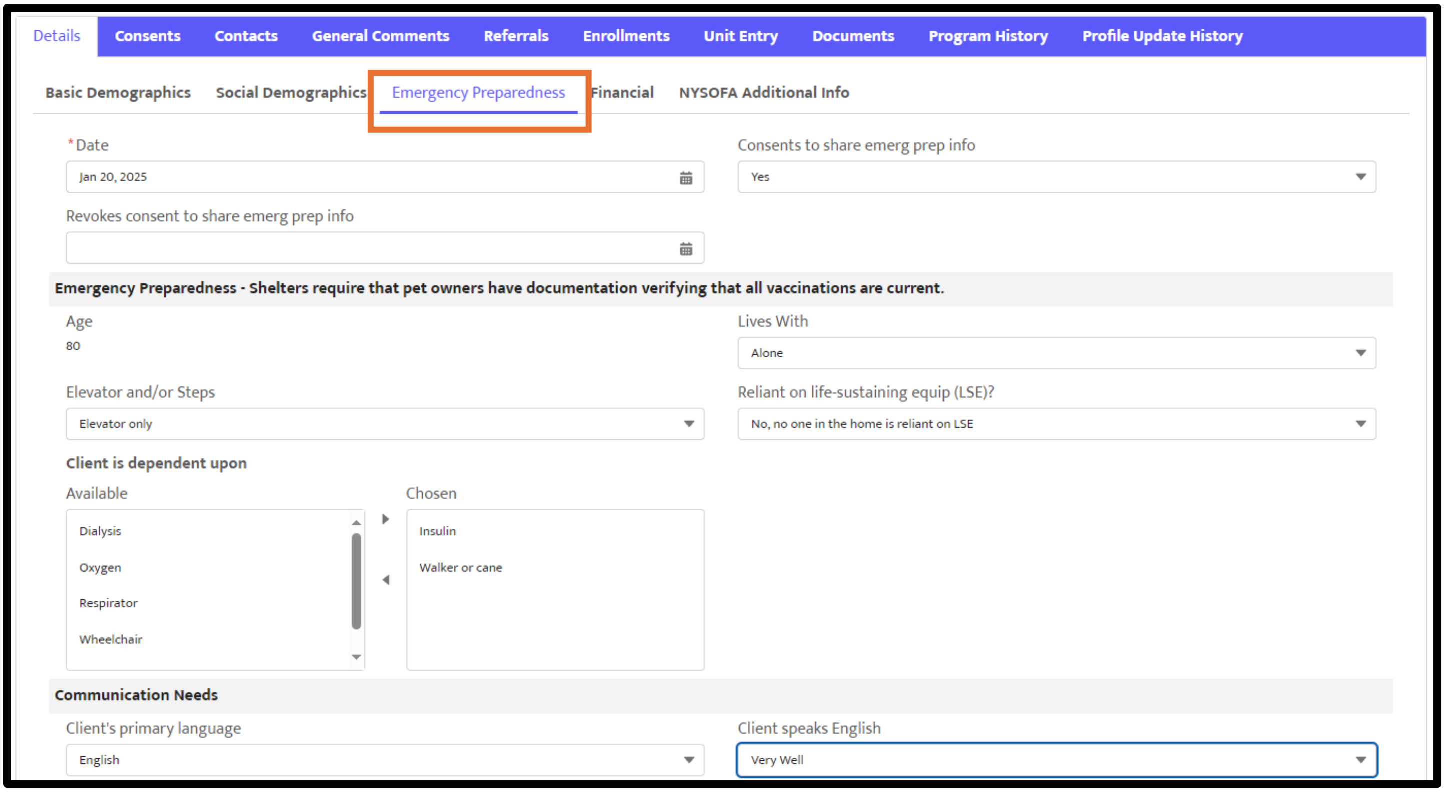
Sub-Details: Emergency Preparedness

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.



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

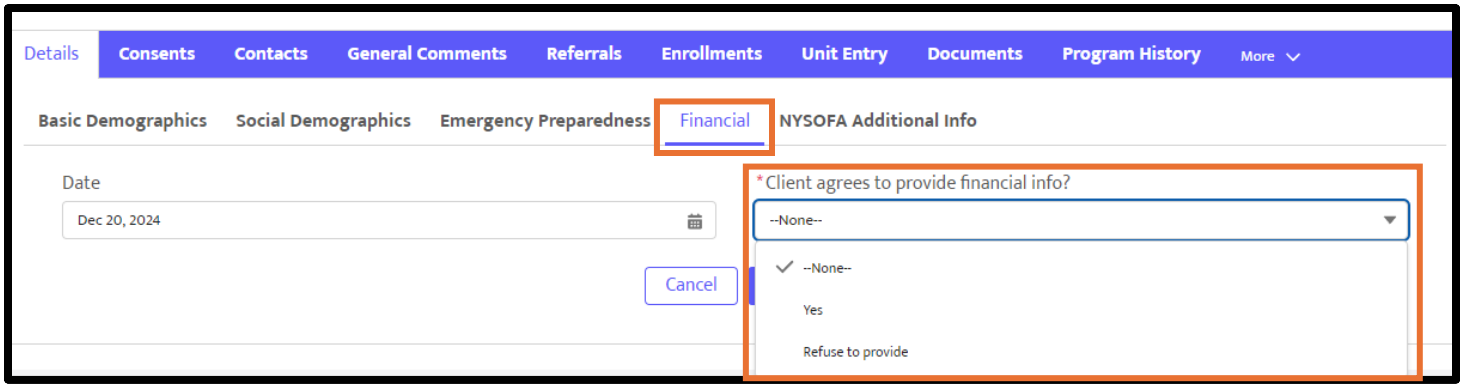
There are several different types of data entry field types. Some are calendar pick lists, dropdown menus, as well as the option to select and move one or more items from the Available box to the Chosen box. Once finished, select the **Save** button at the bottom of the page.



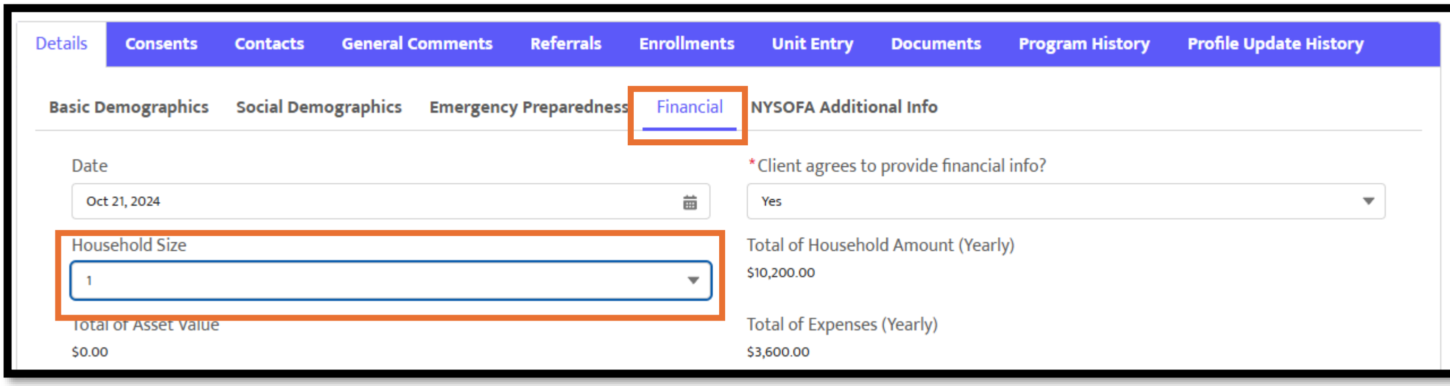
Sub-Details: Financial

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

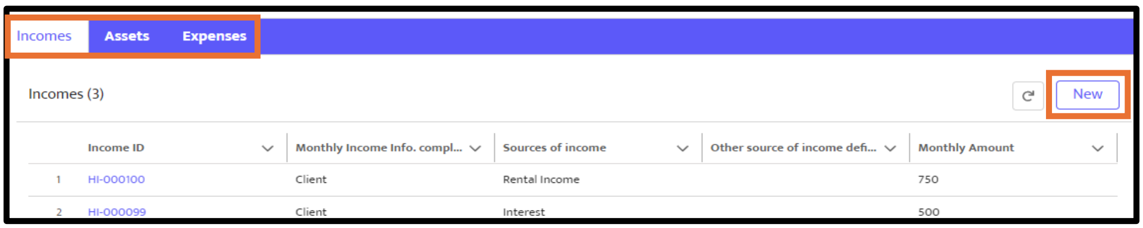
If the client agrees to provide financial information, select the **Edit** button to review the options in the drop-down menu. Select "Yes" client agrees and then select the **Save** button.



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.

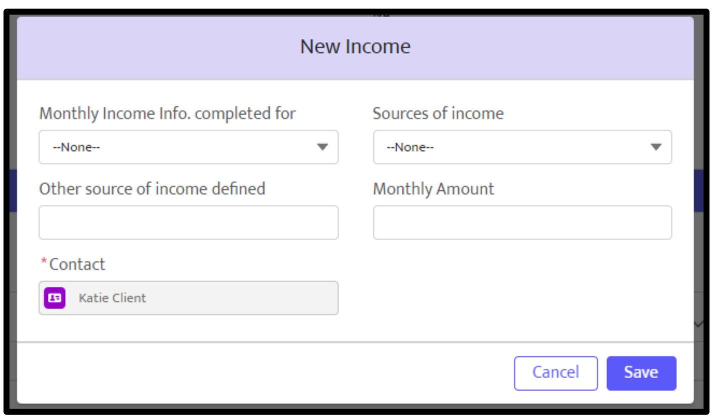


At the bottom of the page, there are three tabs: Income, Assets, and Expenses.



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 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**.

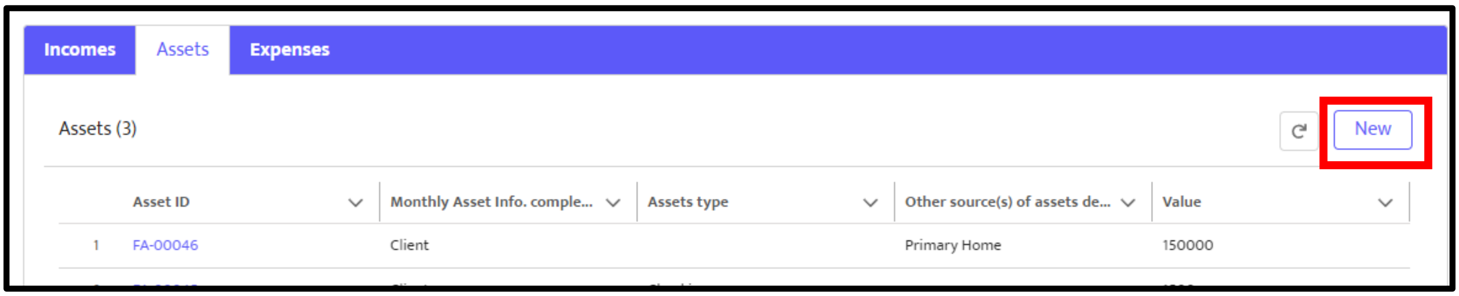
At the top of the page, there is a summary of the household size, total annual income, total assets and total expenses. If you want to see the Poverty Levels chart, click the hyperlink underneath the **Poverty Level PDF** label.

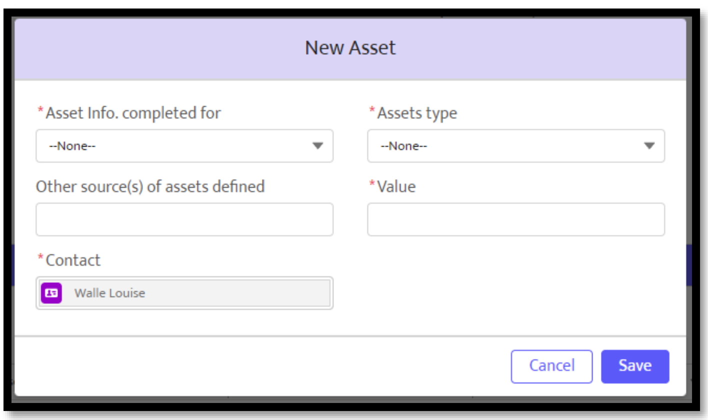
To edit any of these details, click the **Income** tab then select the link for a source of income. That brings you to the details for that income source, those details can be edited by clicking any of the pencils. Select **Save** when finished and **Exit** to return to the top of the page.

***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.



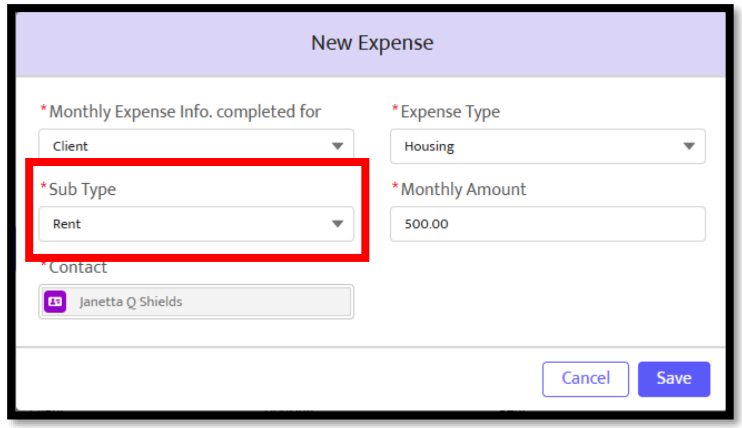


The **New Asset** pop-up identifies the owner of the asset, its type and value.

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.

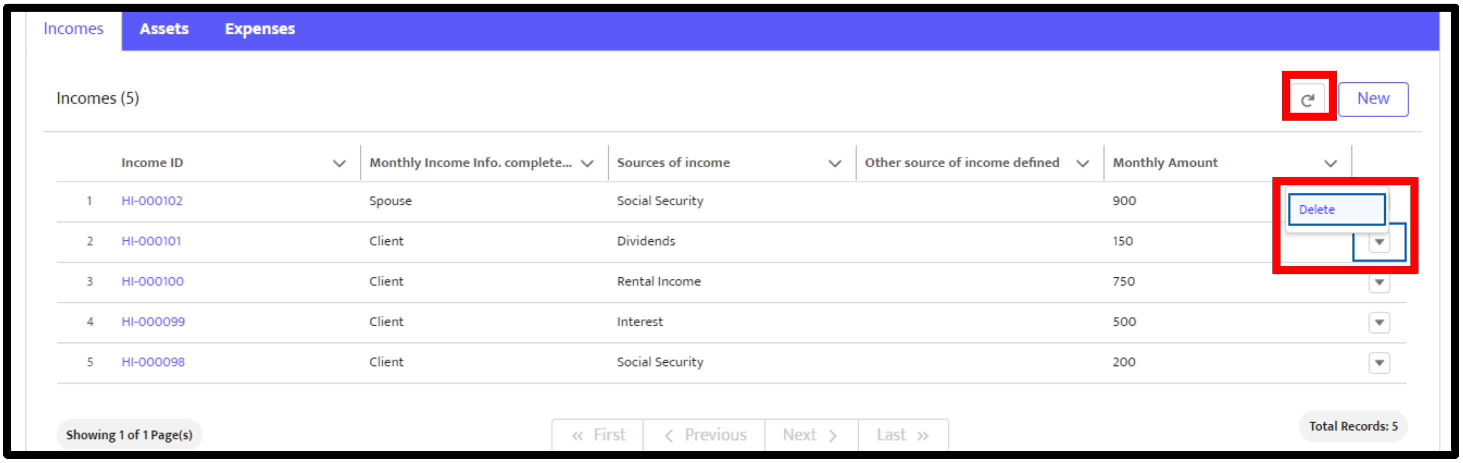
To Enter Expenses

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.



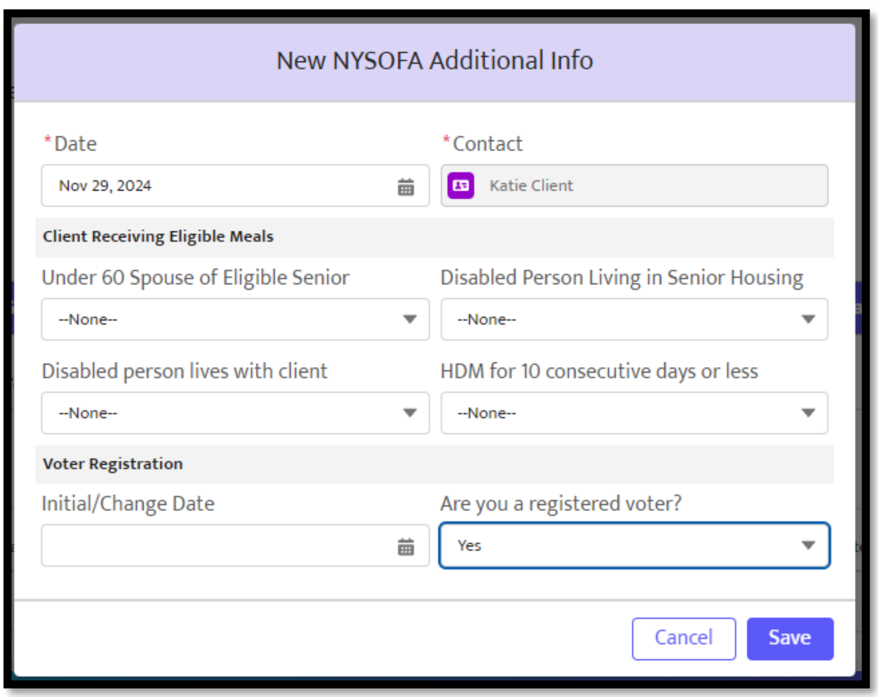
To Delete Financial Information

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.



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**.



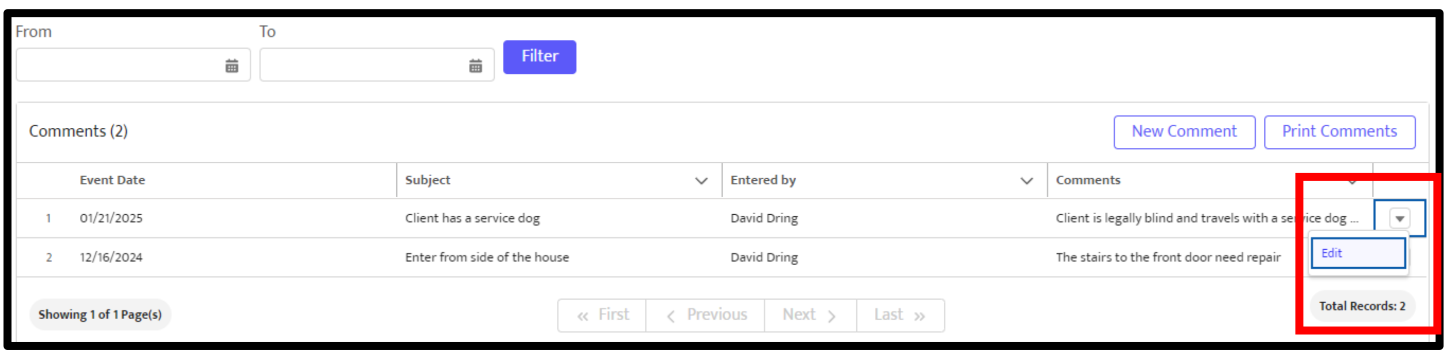
- When finished select **Save**. This will bring you back to the list view of **NYSOFA** information.
- If you need to edit previously entered **NYSOFA** Information, click the hyperlink in the ID column to open the **NYSOFA** screen, select the **Edit** button to make the changes. When you are finished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

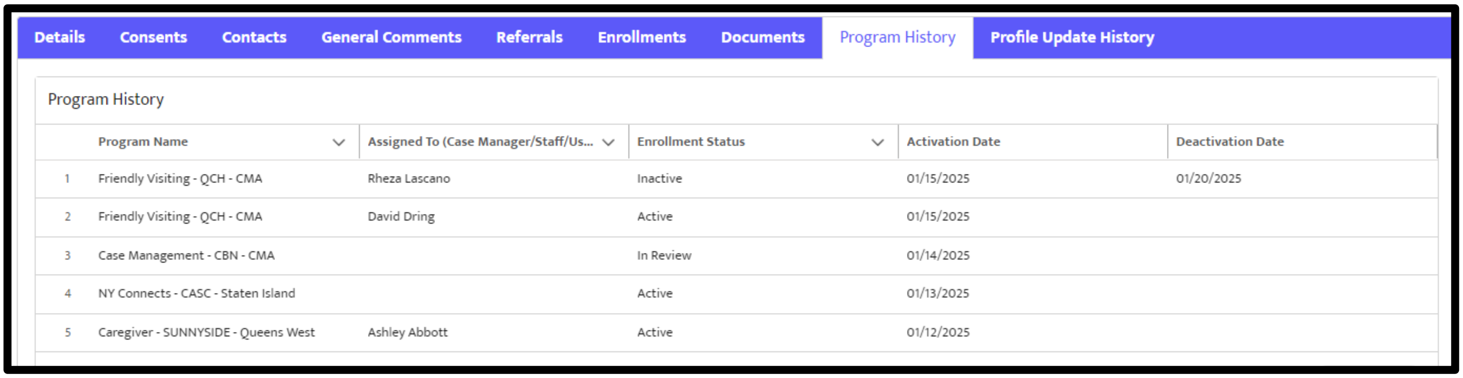
***NOTE**: General Comments are* accessible to all users that have consent to view the client's information.

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.



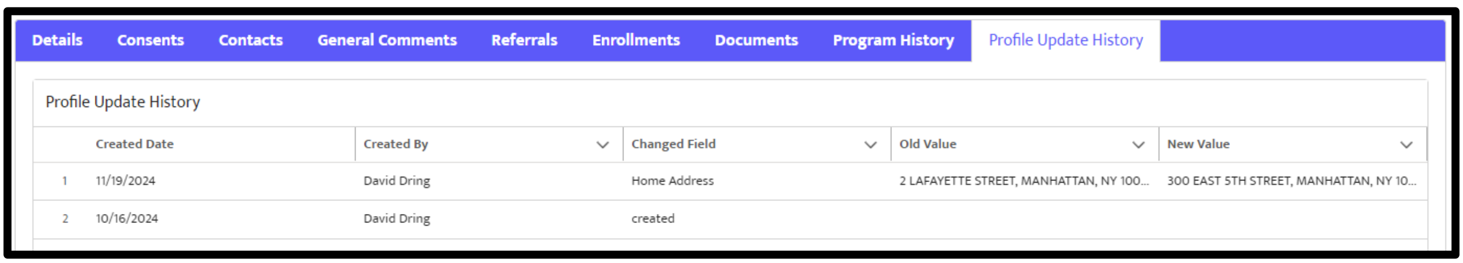
Details	Consents	Contacts	General Comments	Referrals	Enrollments	Documents	Program History	Profile Update History

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		

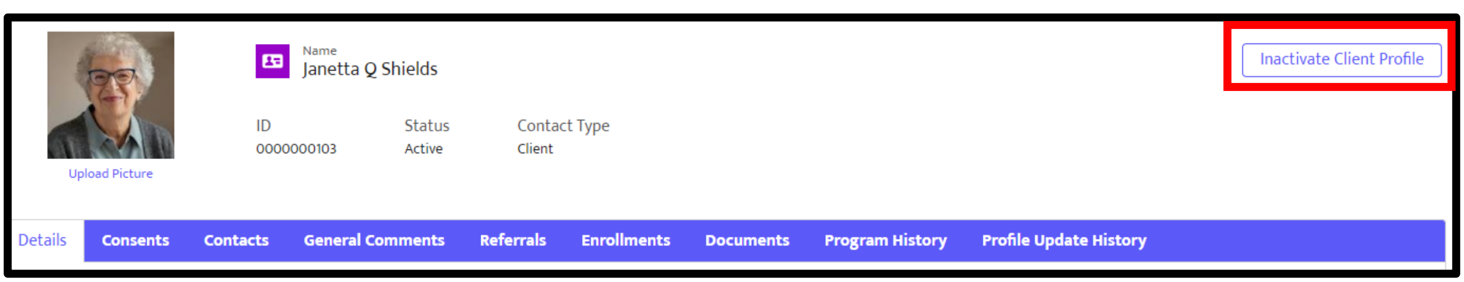
Inactivating a Client

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.

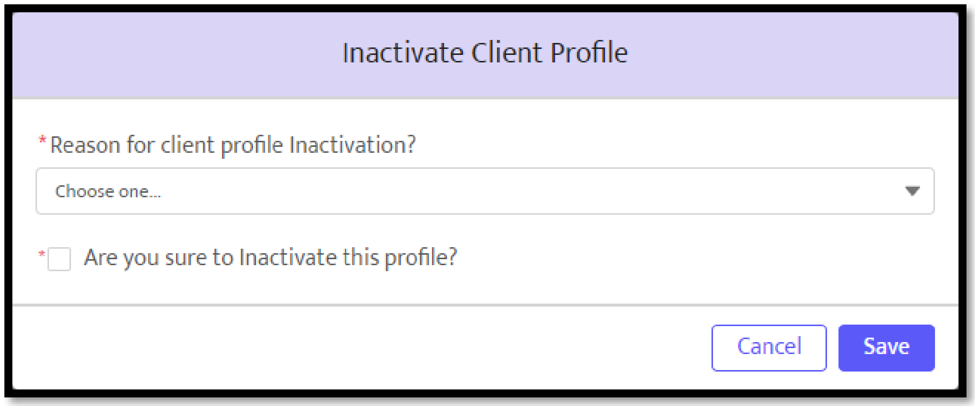


[*VIVÉ Knowledge Base – Client Profile*]

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.



Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

The VIVÉ Enrollments Reference Guide

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

This reference guide provides instructions on **Creating, Approving, Rejecting, Assign Worker, On Hold,** and **Closing Enrollments. Enrollments** is a common functionality within VIVÉ. You may access this guide from the VIVÉ Knowledge Base or from a program specific reference guide. At the beginning and end of this document is a link to return to the VIVÉ Knowledge Base. You can also use your browser's back button to return to the program reference guide.

This guide provides navigational and functional instructions. For assistance with program operations or policy, please refer to your program officer or view NYC Aging's Program Standards.

Overview of Enrollments

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

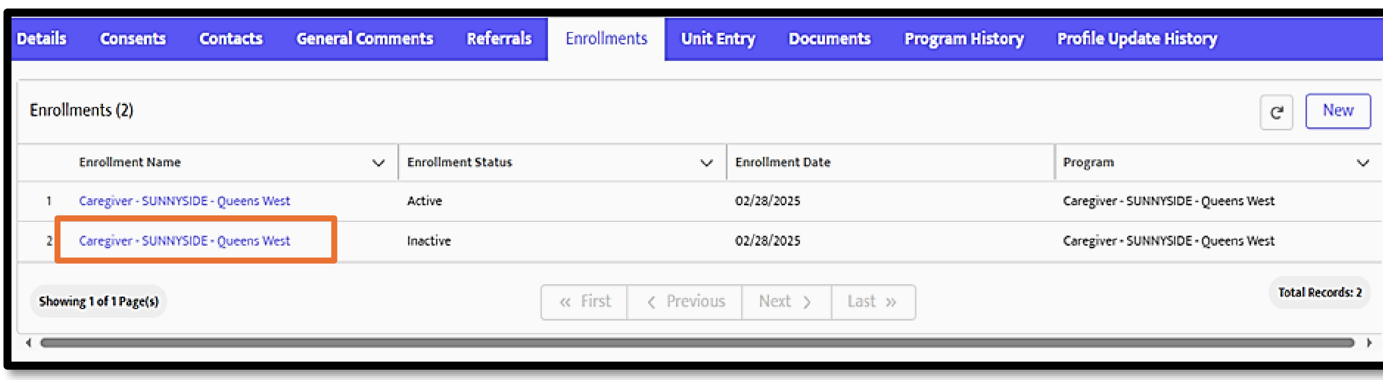
The **Enrollment** menu contains various tabs providing access to capture information about the client and track the work done on their behalf. The default tab on the menu bar will be **Enrollment Details.** Depending on the program type, the status of an enrollment will either default to **Active** or **In Review** unless changed.

Determining Client Enrollment

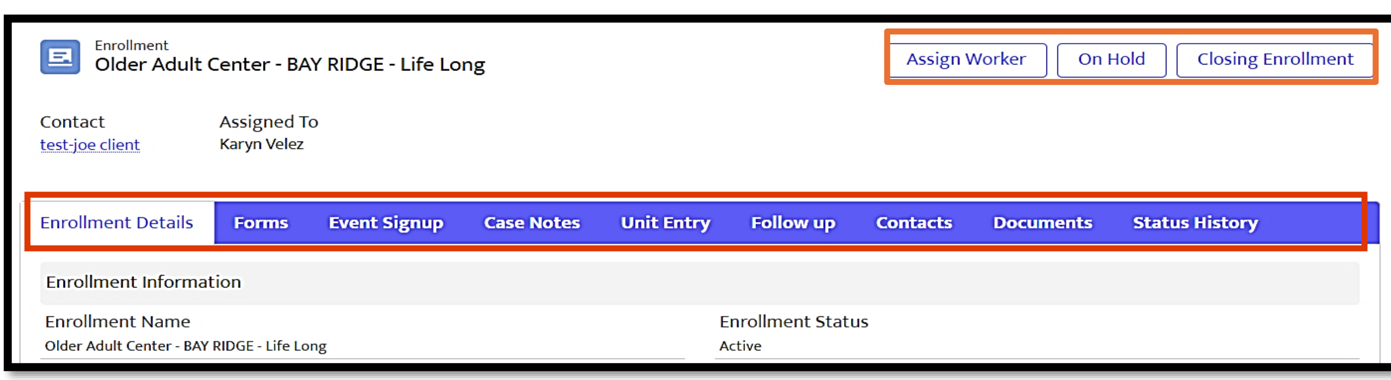
Step 1: Perform a **Client Search** and select the link of the desired client to open their profile.

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.

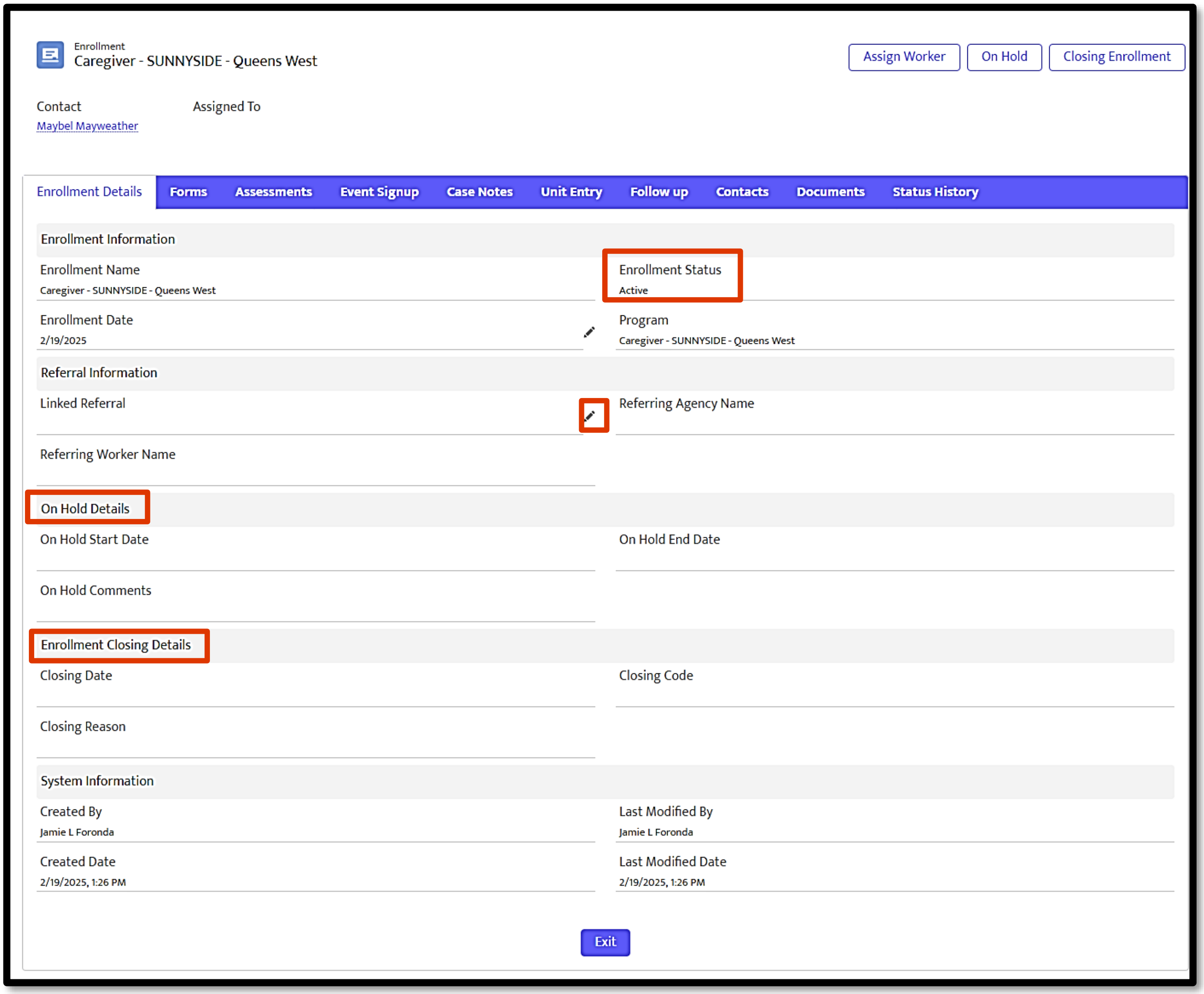


The top portion of the enrollment page will display the client's name, the name of assigned worker, and several navigational buttons that provide access to other database features. In addition, it also provides an overview of the enrollment record, **Referral Information**, **On Hold Details**, **Enrollment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



Creating Enrollments

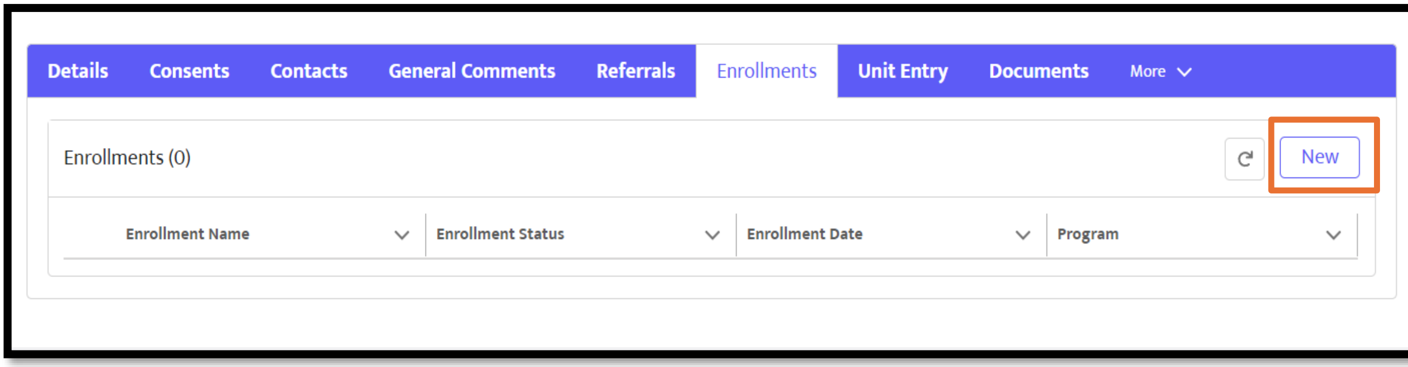
The **Enrollment Status** of the client will also display as **Active** by default unless changed. If no record is displayed on the Enrollments list view, then a new enrollment can be created.

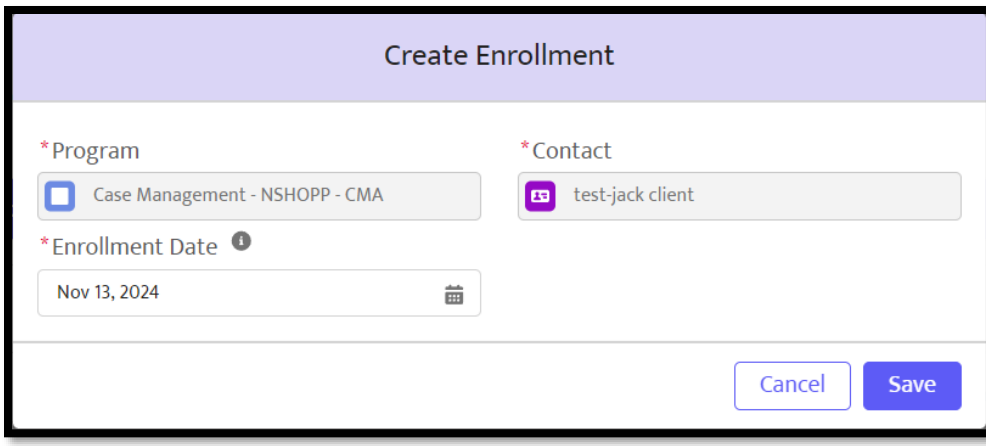


[VIVÉ Knowledge Base – Enrollments](#)

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.

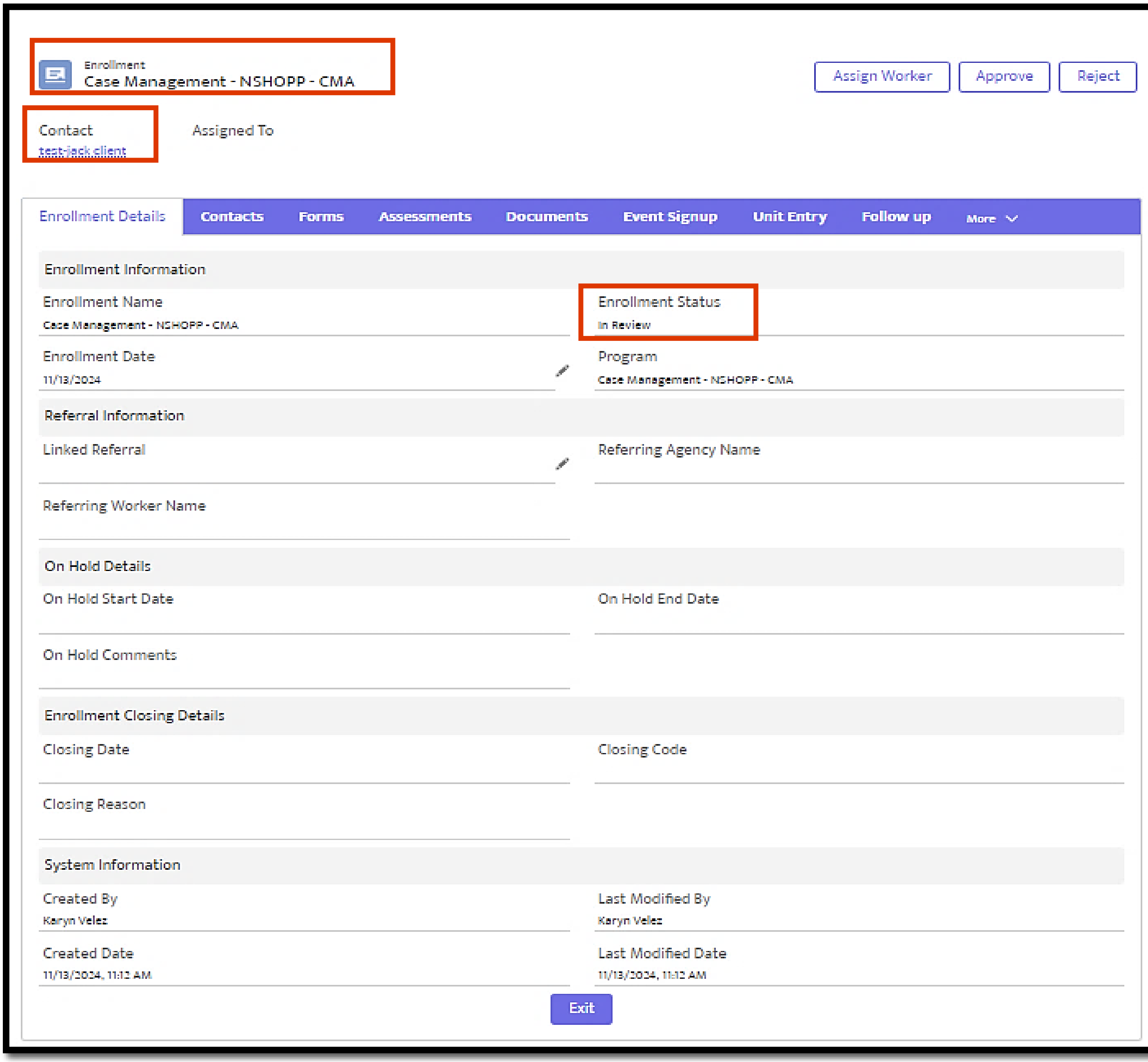
Step 3: Confirm all information is correct before selecting **Save** and you will be directed to the **Enrollment Details** section.

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 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.

[VIVÉ Knowledge Base – Enrollments](#)

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.

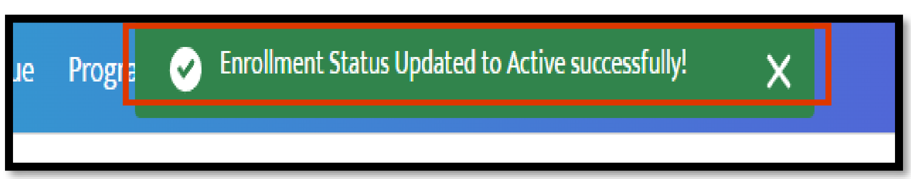
Enrollment: Additional Features

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

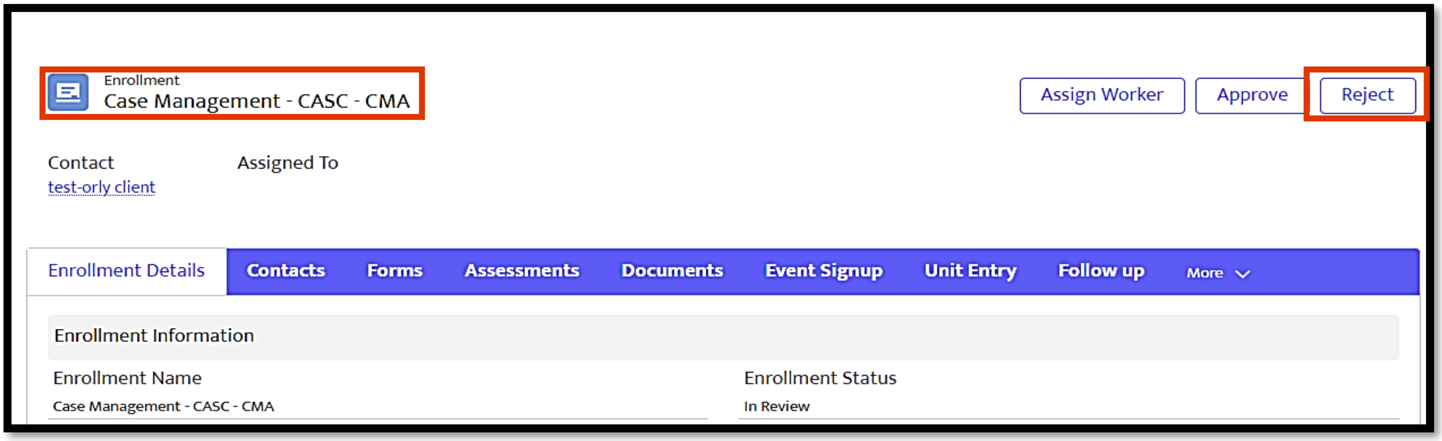
Programs who must **Approve** clients before the status of their enrollment can be updated from **In Review** to **Active** will see the **Approve** button displayed on the **Enrollment** screen. Once the **Approve** button is selected, a notification of successful activation will display. *(See below)*



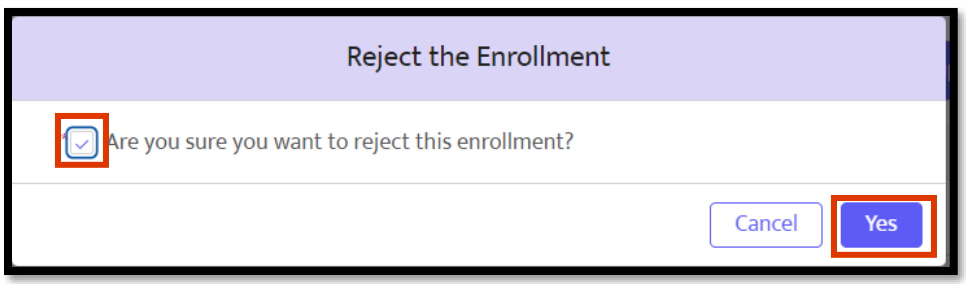
The **Approve** and **Reject** buttons from the **Enrollment Details** screen are replaced with a **Closing Enrollment** button. The status of the client's enrollment updates to **Active**.

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.



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?"



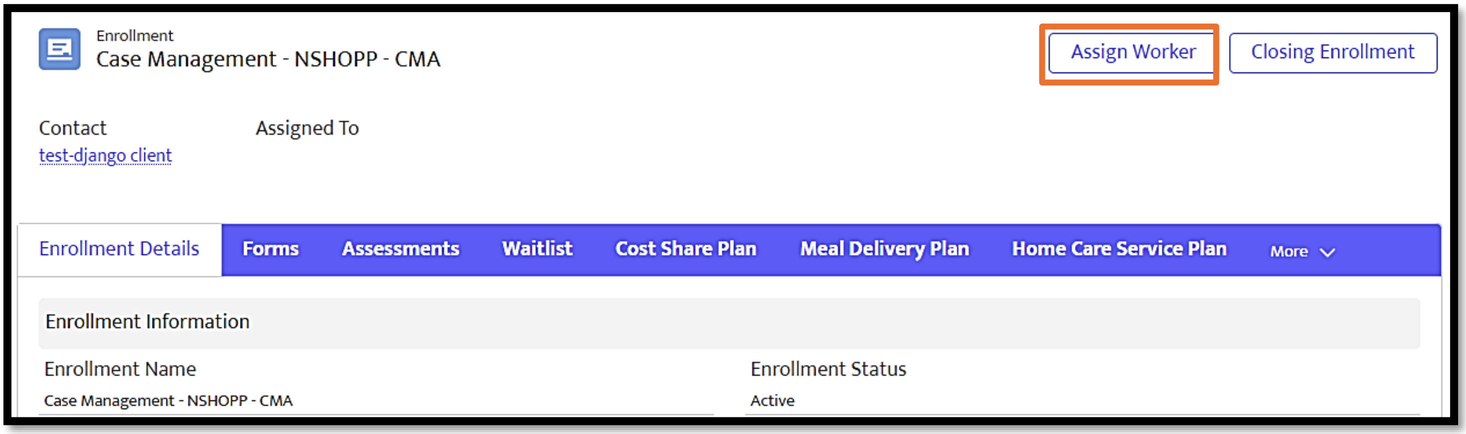
Step 3: Select Yes. The Enrollment Status will be set to Inactive on the Enrollment Details page.

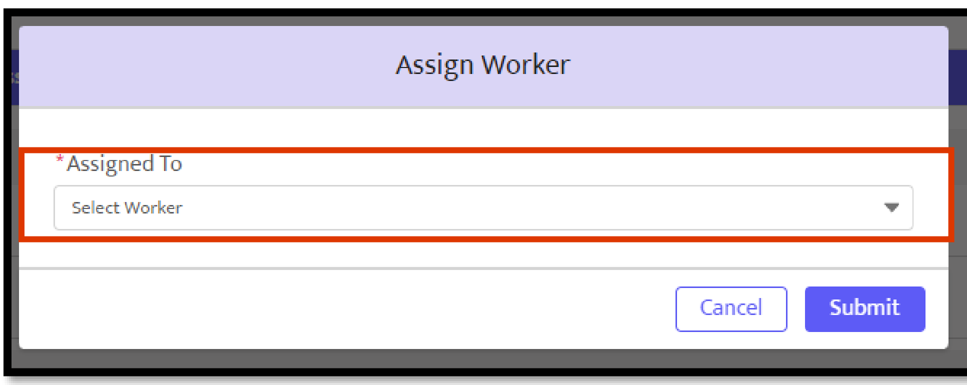
NOTE: If the **Reject** button is selected, the client's enrollment will be **Inactivated**. To "reactivate" the client's enrollment, a new **Enrollment** will need to be created.

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.



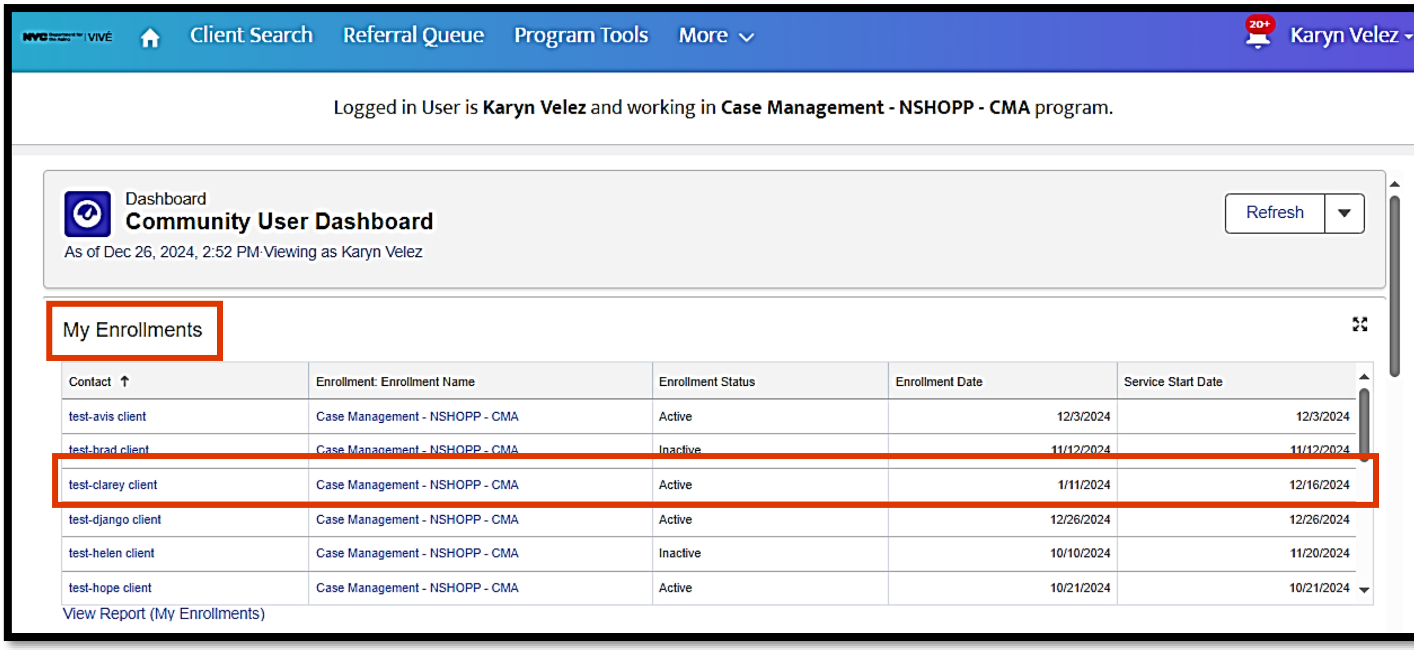


Step 2: Pick the worker's name who will be assigned to the client and select **Submit**. The worker's name will be added to the **Enrollment** screen's **Assigned To** field. A user can also view their assigned enrollment(s) through the **Dashboard** in the **My Enrollments** section.

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

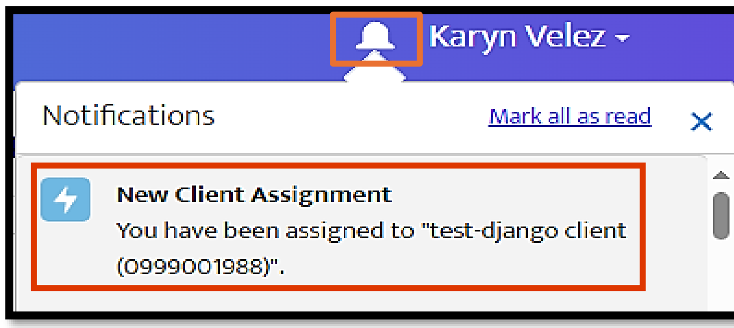
My Enrollments in Dashboard

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.



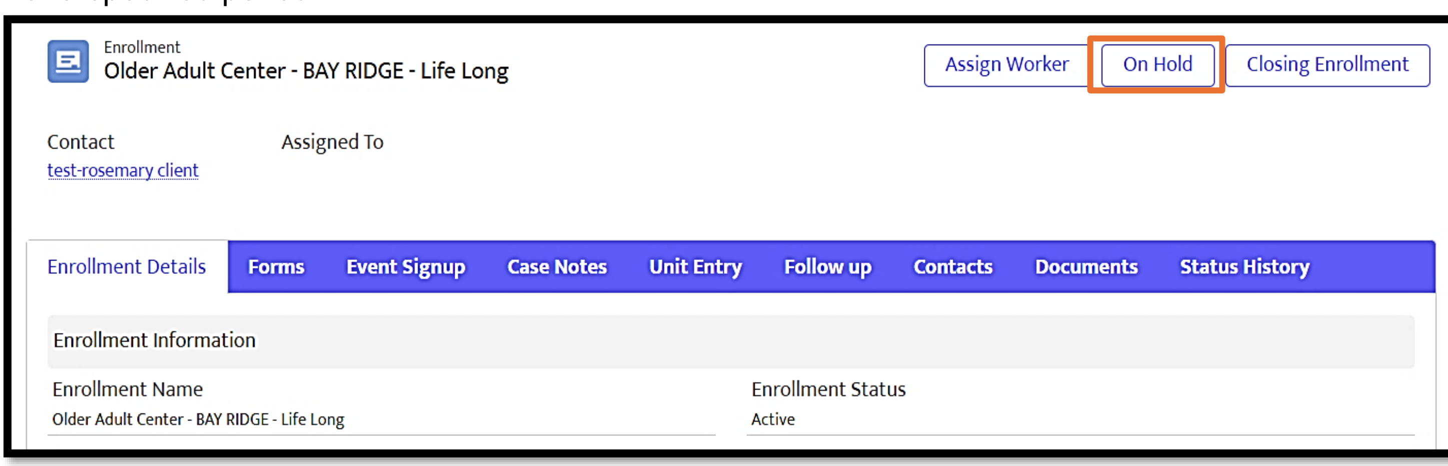
In addition, a notification prompt regarding the recently assigned Enrollment will display in Notifications. To view this request, select the Bell Icon.

(For more information on Dashboard)



Place an Enrollment On Hold

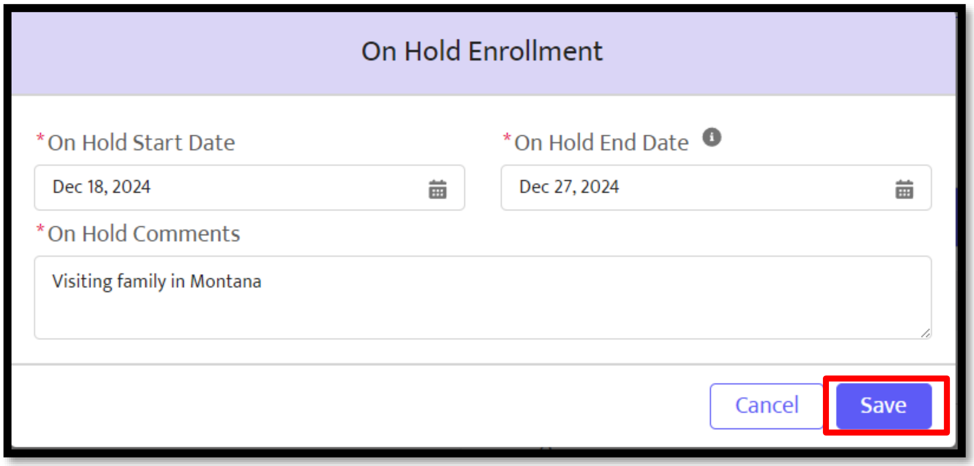
On the **Enrollment Details** screen, the **On Hold** button places an active client's enrollment **On Hold** for a specified period.



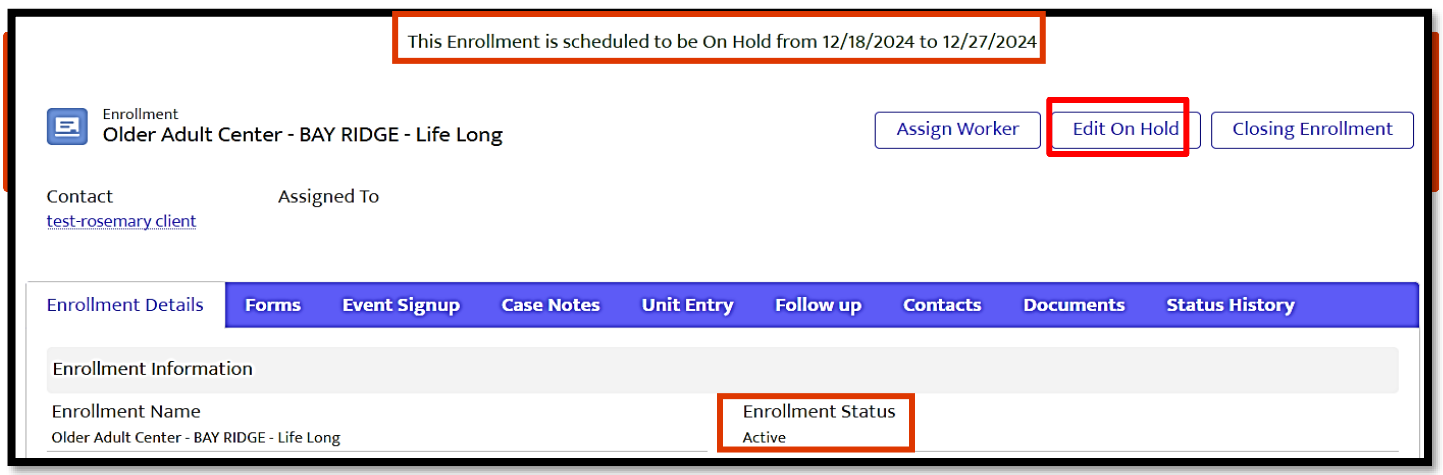
Step 1: Select the **On Hold** button. The **On Hold Enrollment** pop-up will display.

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.**

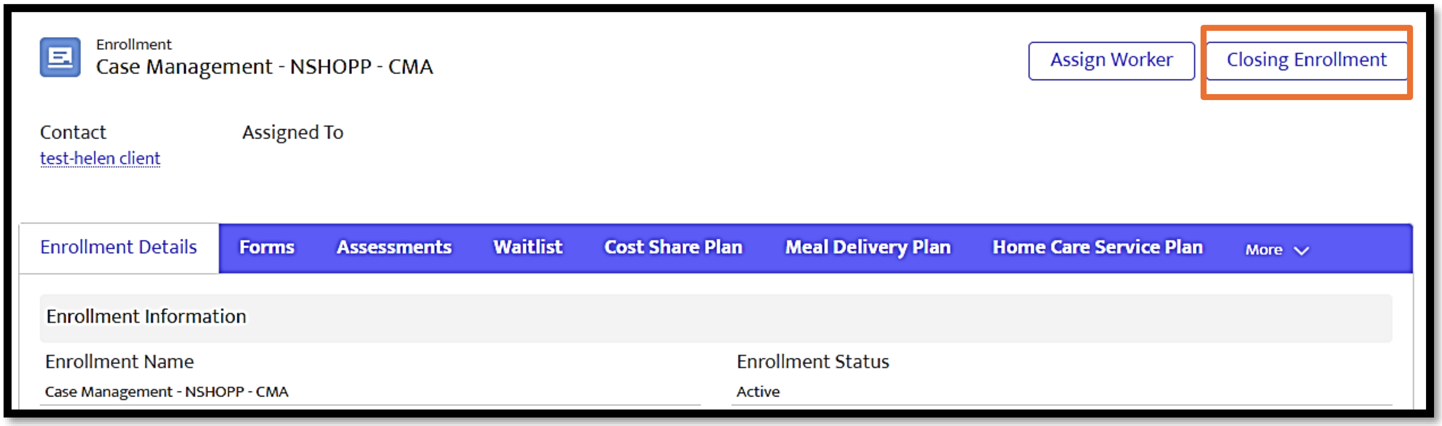


If the **On Hold** request requires editing, select the **Edit On Hold** button from the **Enrollment Details Menu** and make all necessary changes. These changes can be made prior to the start of the **On Hold** date or any time during the scheduled **On Hold** period.



Closing Enrollment

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

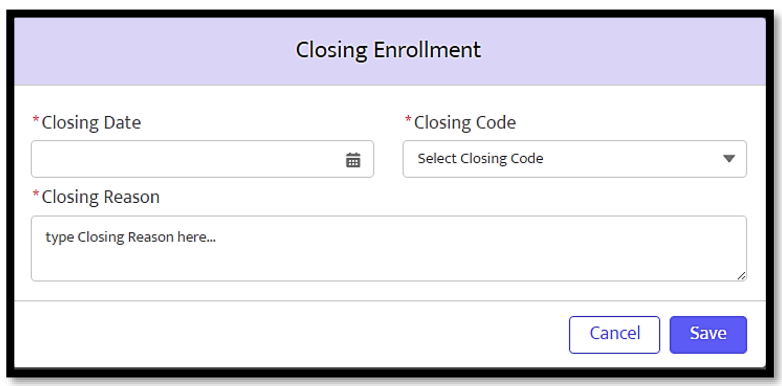


NOTE: Closing an enrollment only closes the client's enrollment status with your program and does not close the client's enrollment for any other NYC Aging programs. The client's case remains **Active** at the **Client Profile** level until the **Inactivate Client Profile** process has been completed.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

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

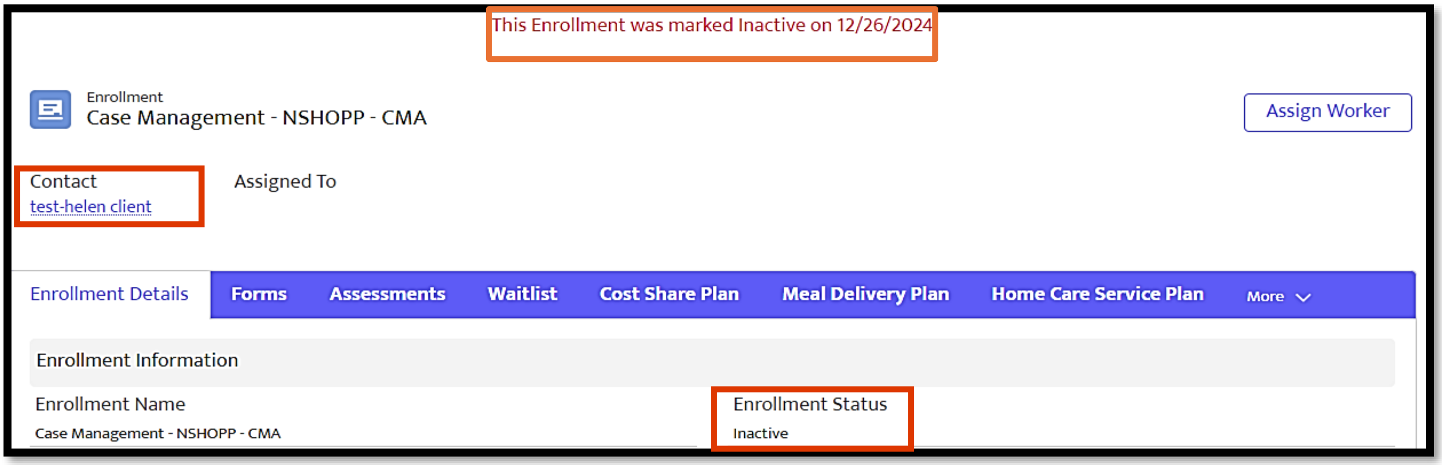
Closing an Enrollment: Past date

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

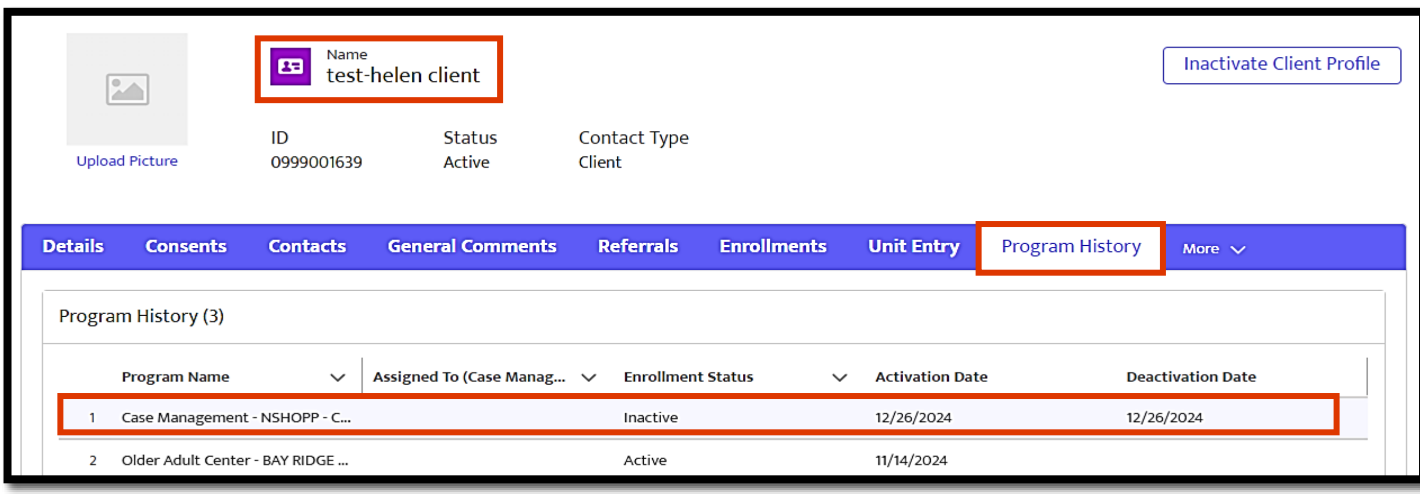


Step 2: The **Closing Date** field can be completed either by choosing a date from the calendar icon or by typing in the date. The **Closing Code** field provides a dropdown list of possible categories associated with why an enrollment needs to be closed. The **Closing Reason** field is a comment box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

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



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



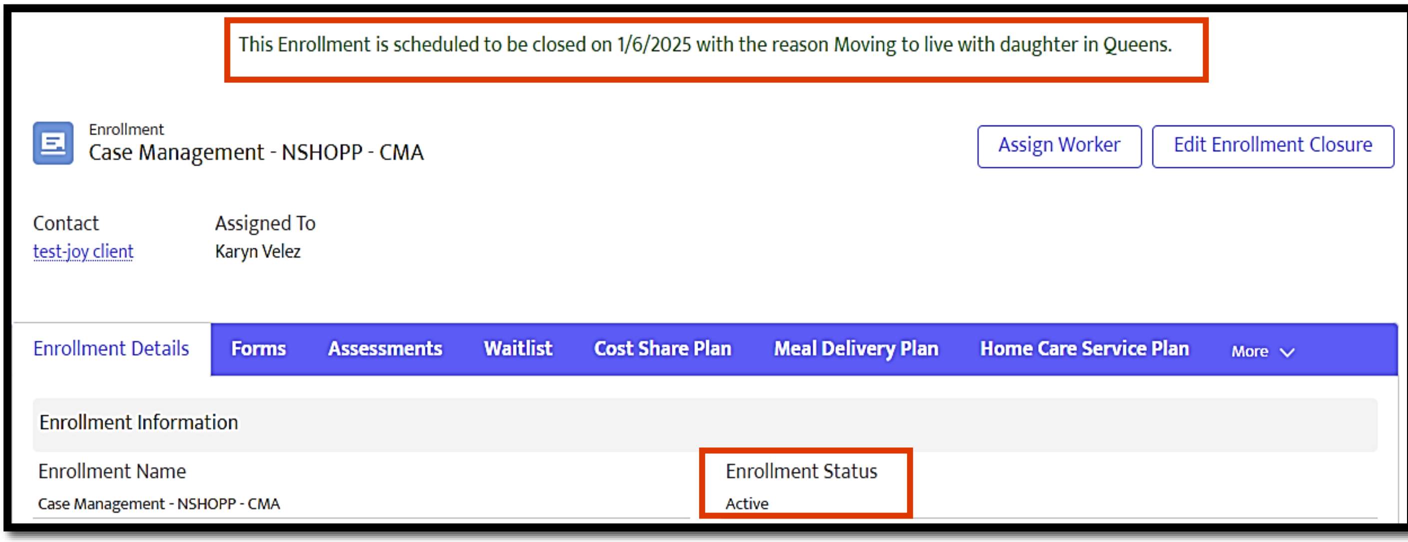
NOTE: To protect client confidentiality, there are four programs that will never display the client's enrollment status on Program History. These programs are Elder Justice, Geriatric Mental Health, Elderly Crime Victims Center and Legal Services.

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**.



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

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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 Case Notes Reference Guide

VIVÉ is a customized client management system designed by NYC Aging. This system supports NYC Aging contractors in managing their client interactions and reporting on services provided. This reference guide provides instructions on creating and viewing, editing, and finalizing **Case Notes**.

Case Notes is a common functionality within VIVÉ. You may access this guide from the VIVÉ Knowledge Base or from a program specific reference guide. At the beginning and end of this document is a link to return to the VIVÉ Knowledge Base. Users can also use their browser's back button to return to the program reference guide.

This guide provides navigational and functional instructions. For assistance with program operations or policy, please refer to your program officer or view NYC Aging's Program Standards.

In this guide you will learn:

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

Case Notes Overview

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

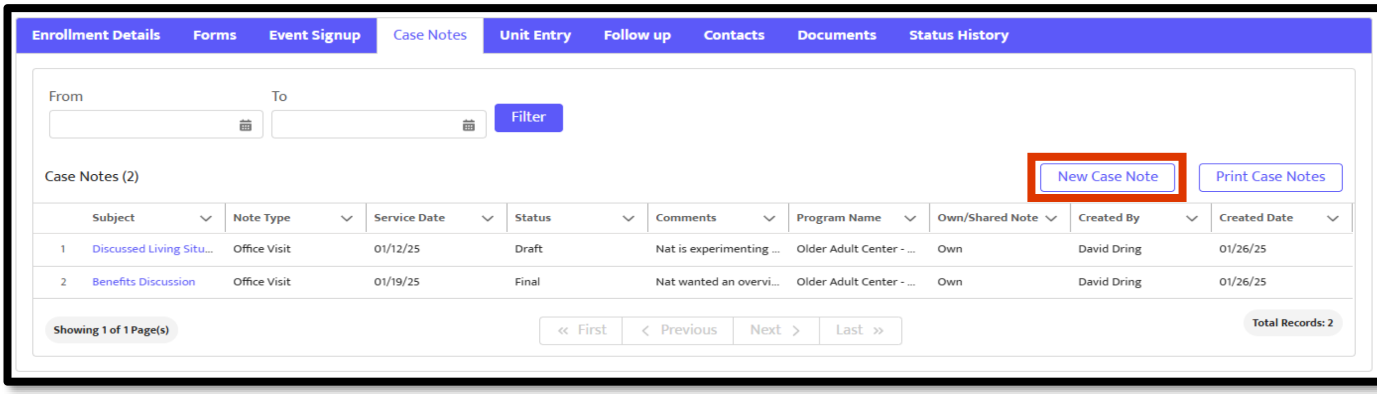
TIP: Be considerate and careful when writing case notes. They are legal documentation, which maybe reviewed during audits, assessments, and legal proceedings.

Entering Case Notes

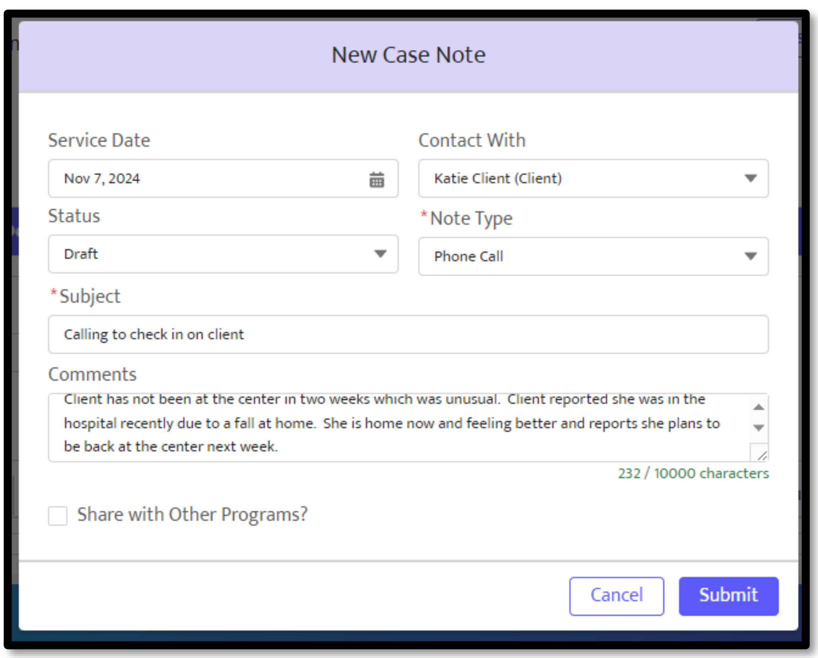
Step 1: From the **Top Menu**, click **Client Search**, find the desired client and click on their name link.

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

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



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:



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

Select **Submit** to save the note.

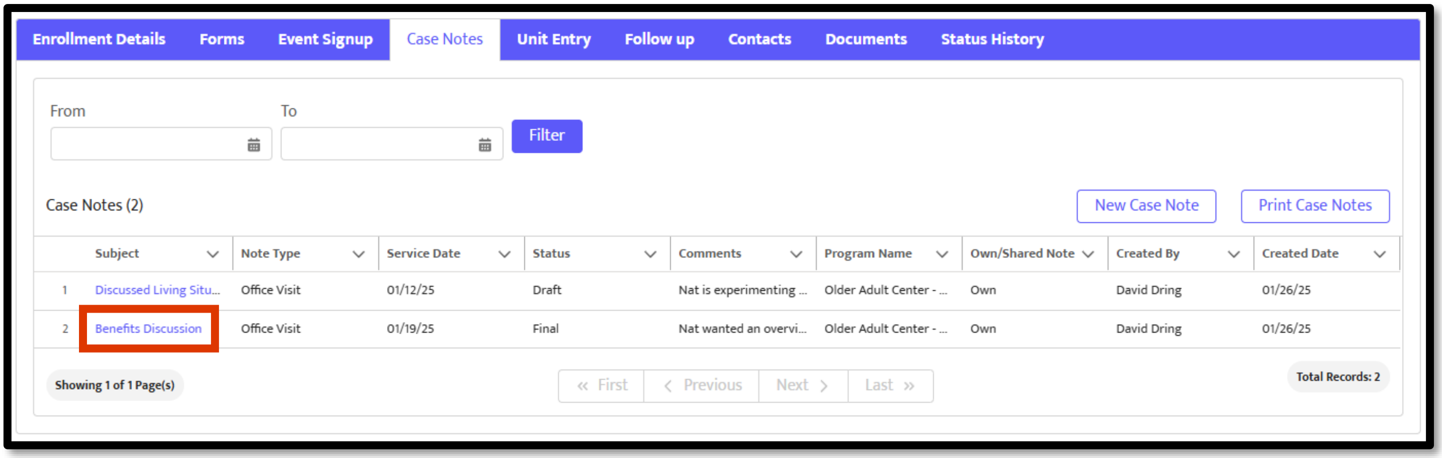
TIP: *The system will become inactive, and you could lose your work, if you do not click/type for 20 minutes. Clicking or typing within the text area within that 20 minutes will start the clock over.*

Editing Case Notes

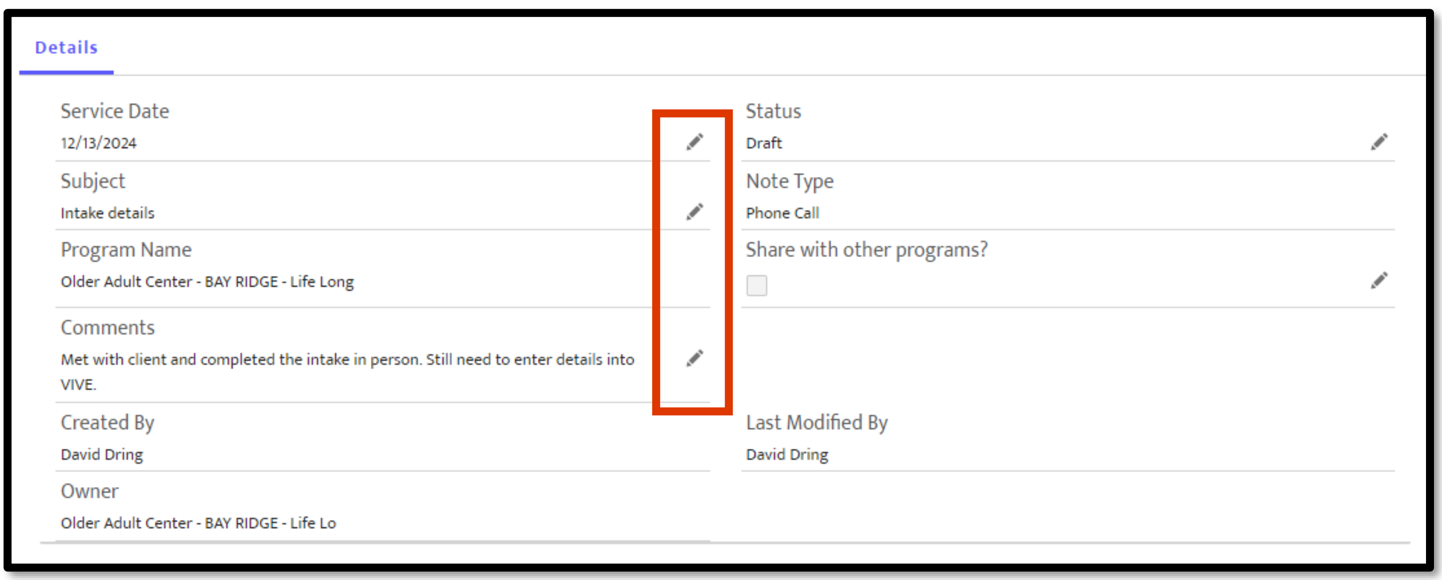
Step 1: From the **Details** menu, click on the **Enrollment** tab and your program enrollment link.

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

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



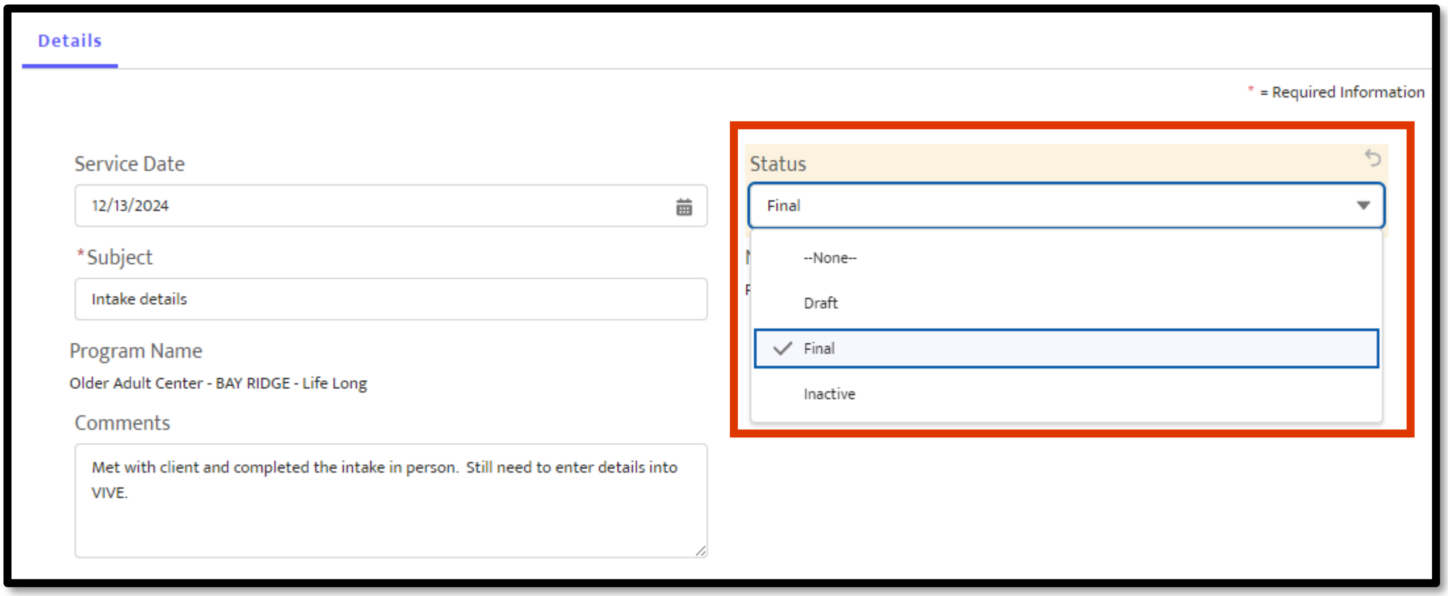
Step 4: Click on the pencils within the **Case Note** details to edit the fields. Once finished select **Save** located at the bottom of the form.



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

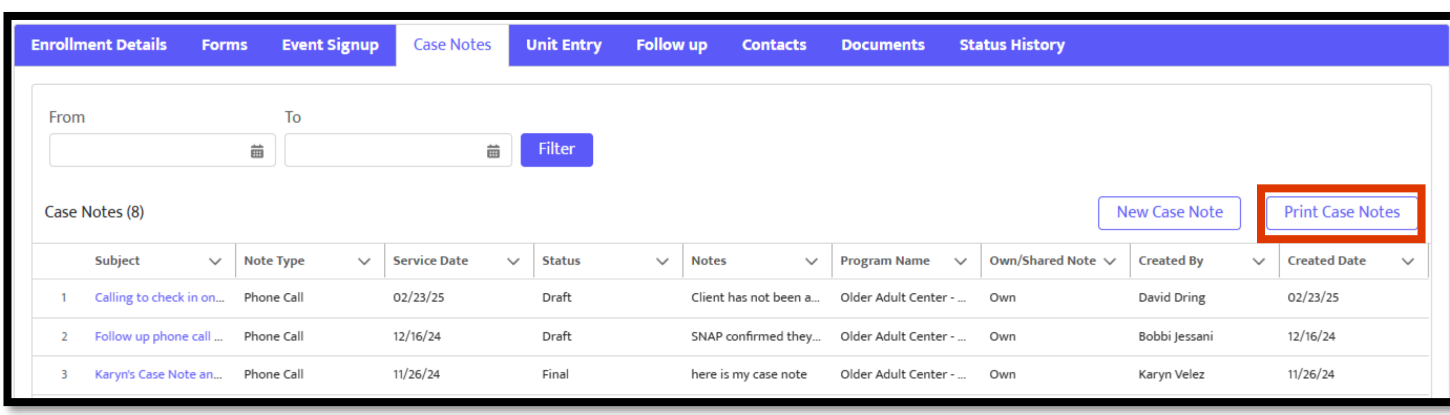
Finalizing Case Notes

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.



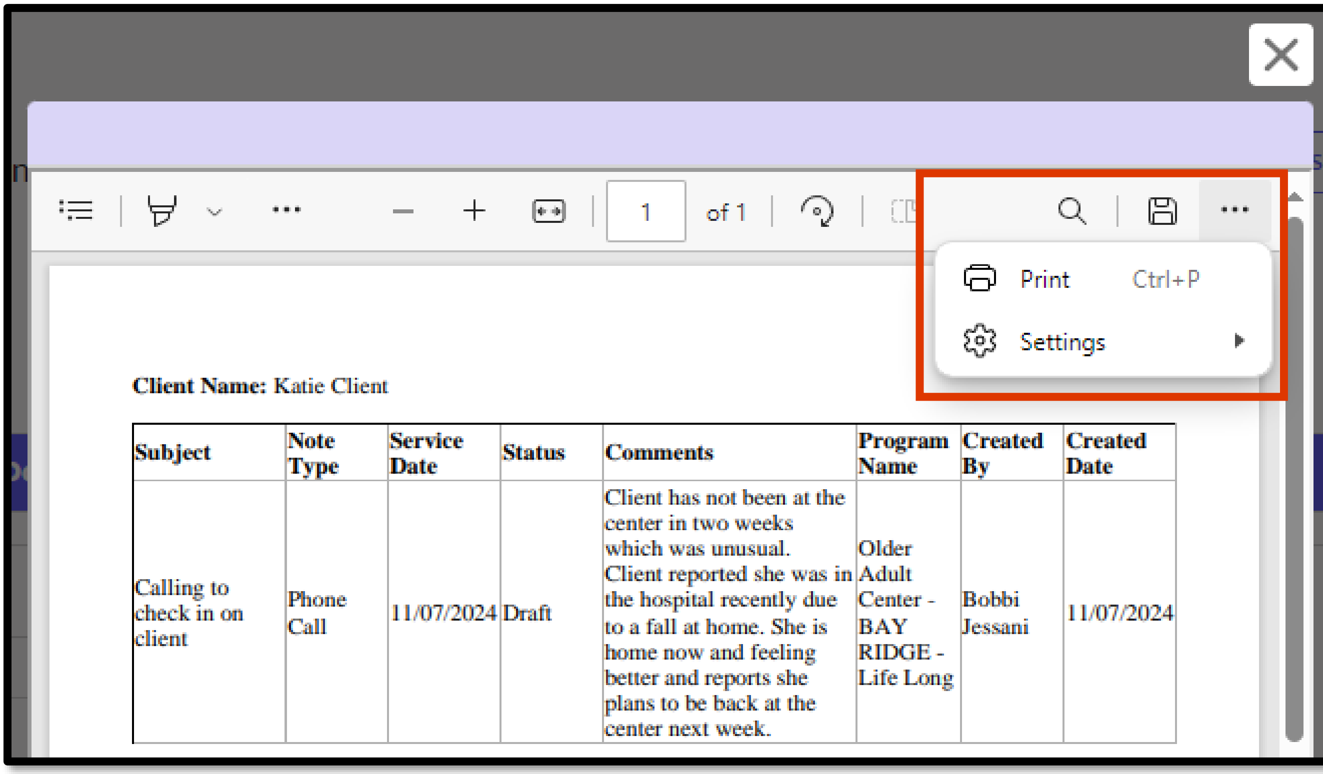
Printing Case Notes

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.



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.



Client Name: Katie Client

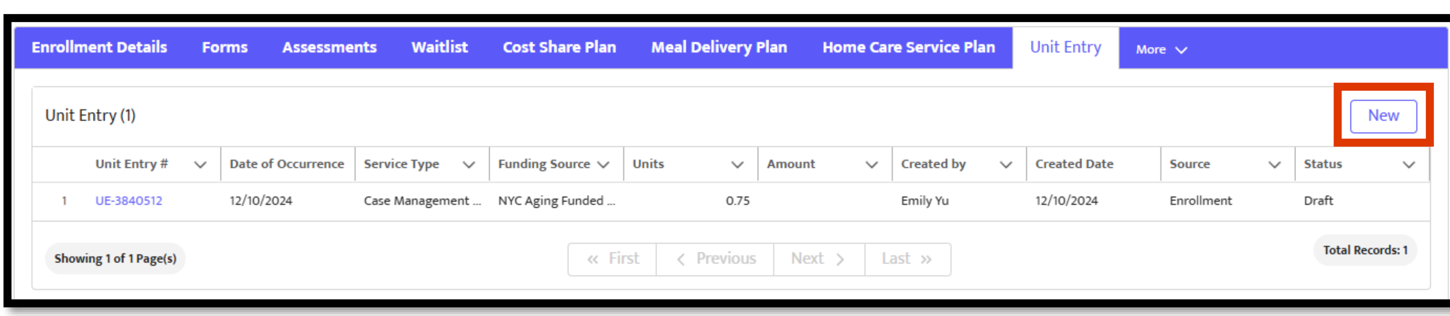
Subject	Note Type	Service Date	Status	Comments	Program Name	Created By	Created Date
Calling to check in on client	Phone Call	11/07/2024	Draft	Client has not been at the center in two weeks which was unusual. Client reported she was in the hospital recently due to a fall at home. She is home now and feeling better and reports she plans to be back at the center next week.	Older Adult Center - BAY RIDGE - Life Long	Bobbi Jessani	11/07/2024

Linking Case Notes to Units

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

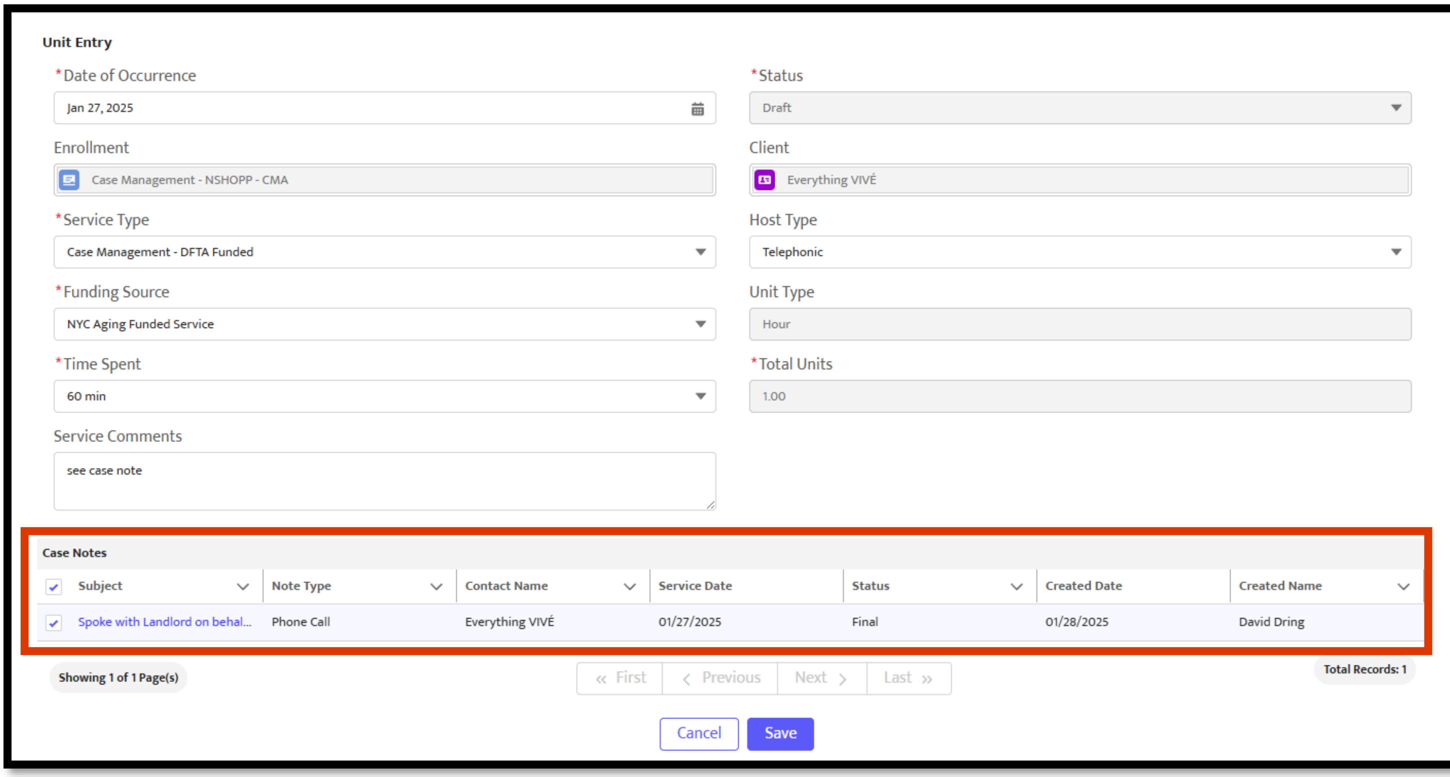
Step 1: Access **Unit Entry** from **Enrollment Details Menu.**

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



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

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.



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 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.

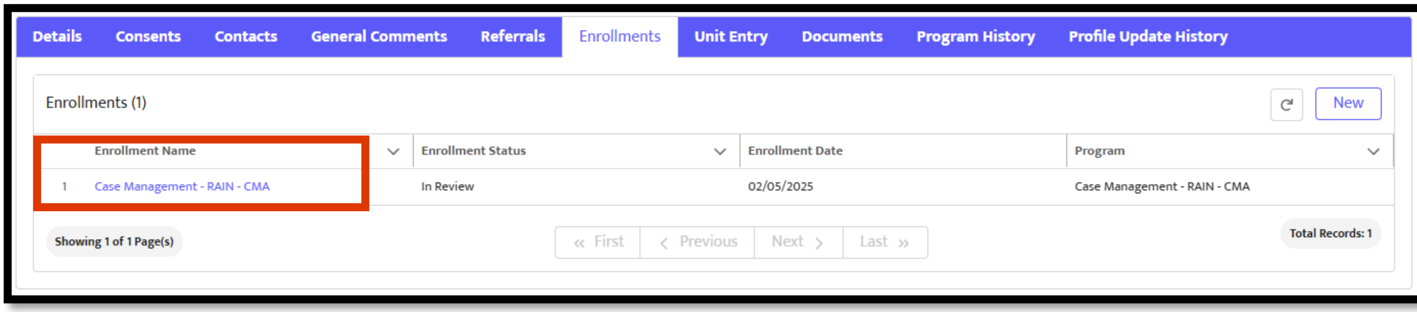
In this guide you will learn to:

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.)

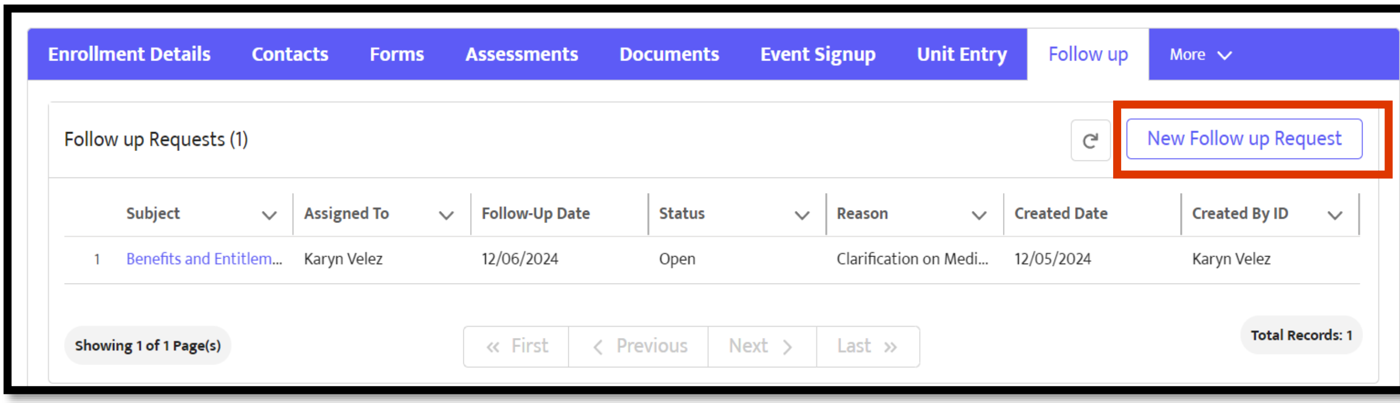
Create a Follow Up Request:

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



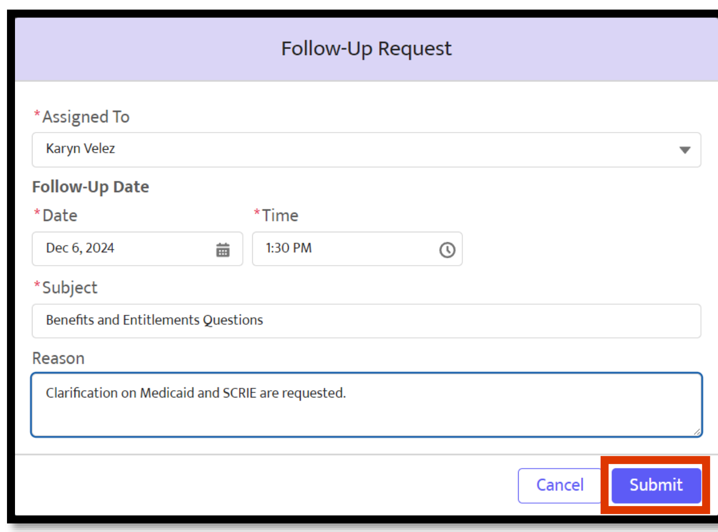
Step 2: Click the **Follow Up** tab. This tab displays the follow-ups that are associated with this contact.

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



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)*

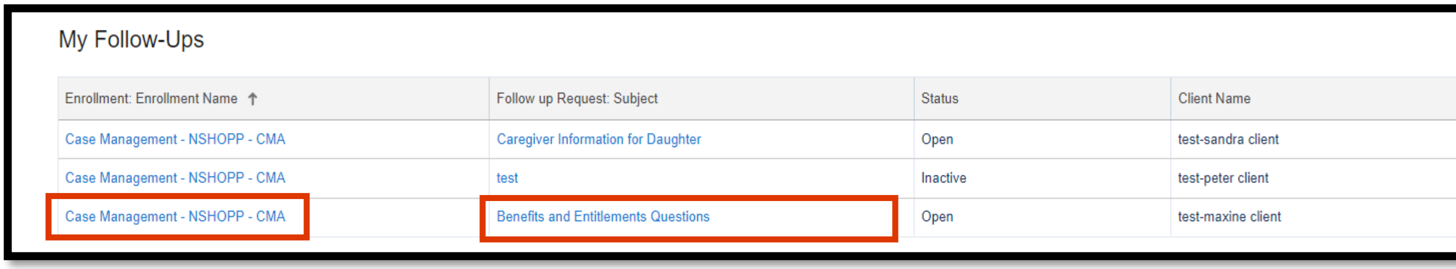


Receive a Follow Up Request

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

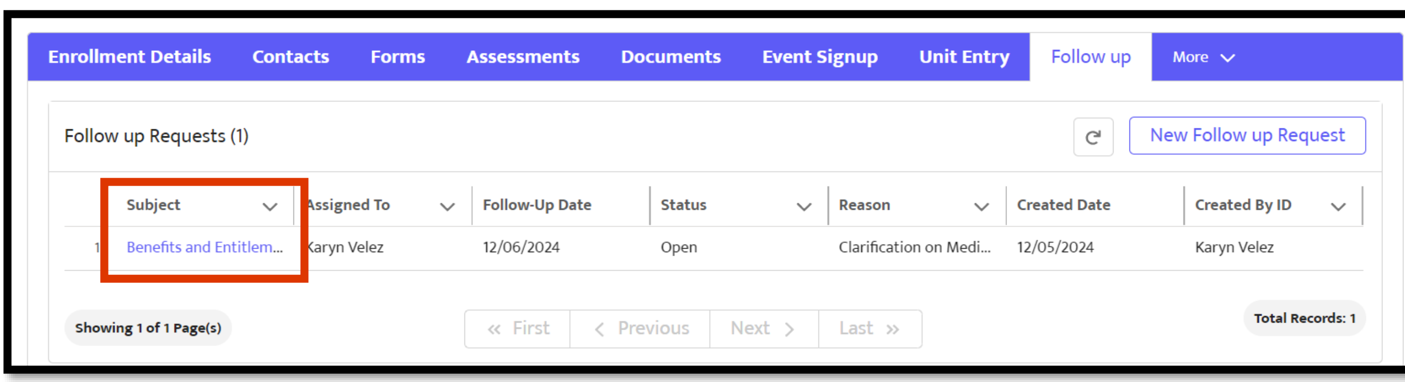
In addition, a notification prompt will be displayed in the assigned worker's **Notifications.** To view this request, the worker can select the **Bell Icon** on the **Top Menu**. Key information about the **Follow Up** will be included in the notification.

Edit a Follow Up Request

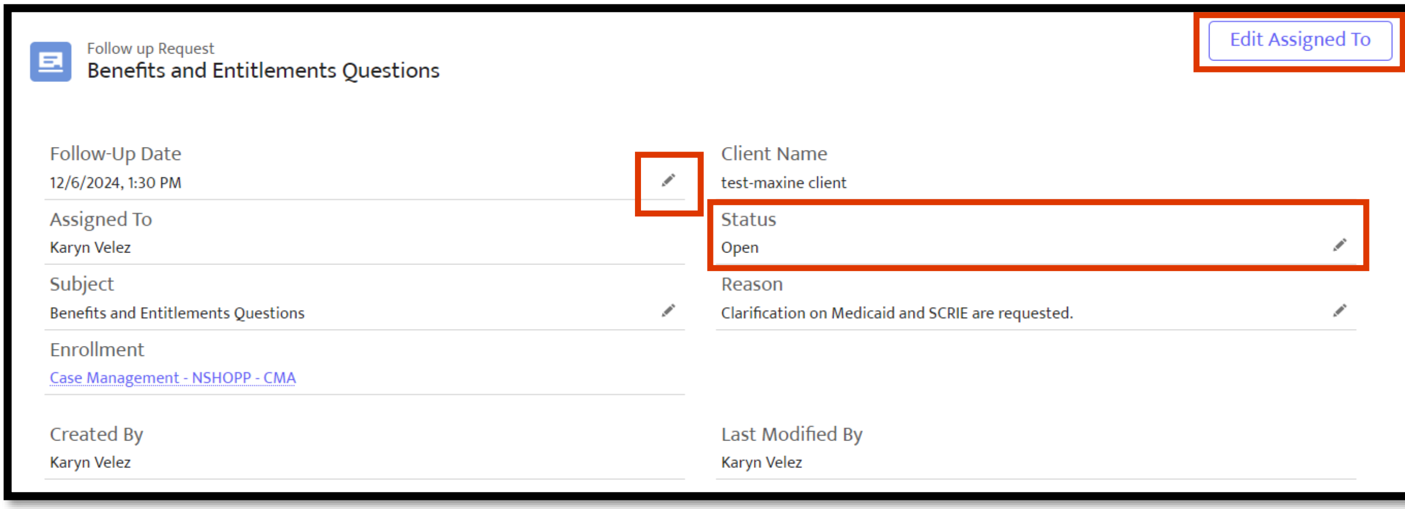
Information details in the **Follow Up** request can be edited prior to the request's **Follow Up** due date or after the request has been completed.

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.



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



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

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

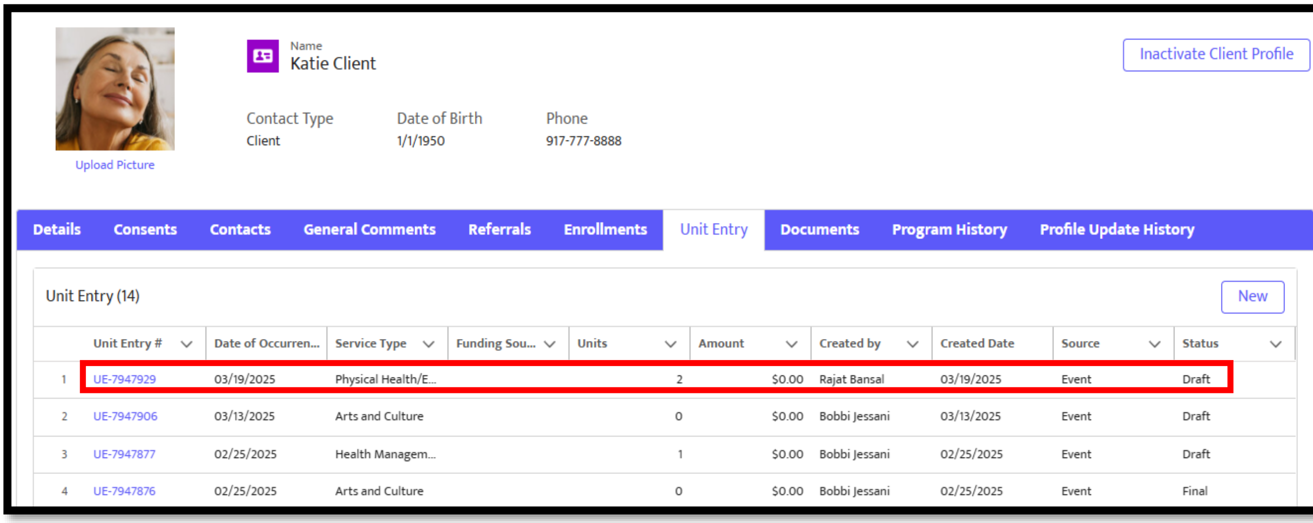
You can enter units in VIVÉ in three places: **Details Menu**, **Enrollment Menu**, or **Program Tools**. For more information on Events.

Editing Existing Units from Details Menu

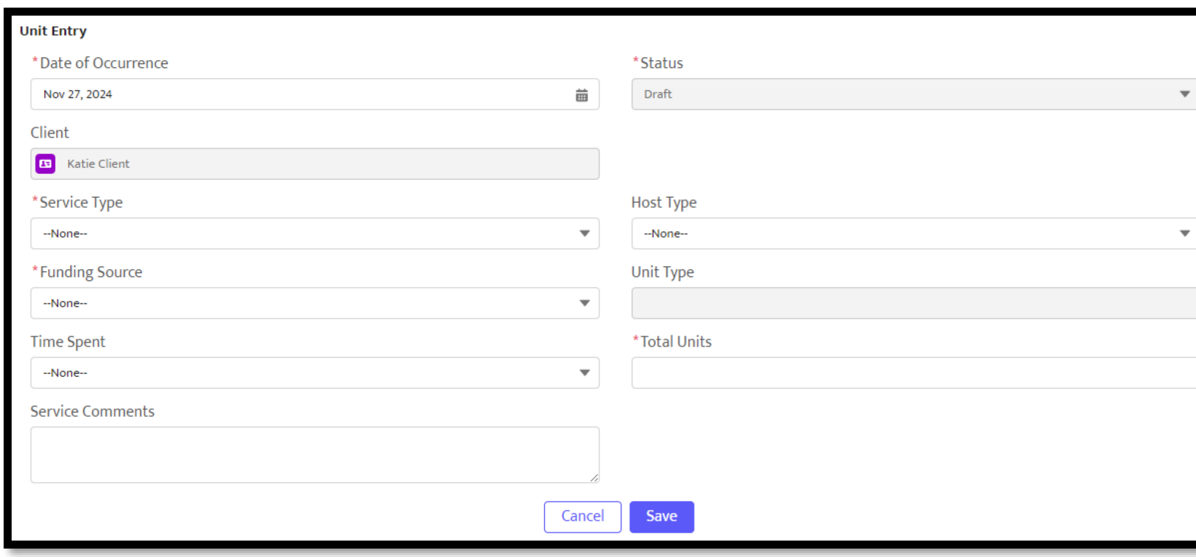
Step 1: From the **Top Menu**, click **Client Search**, find the desired client and click their name link.

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

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



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



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

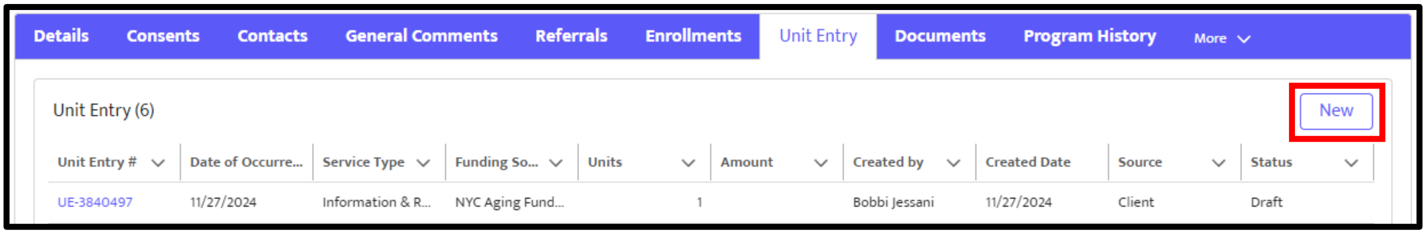
Entering Units via the Details Menu

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

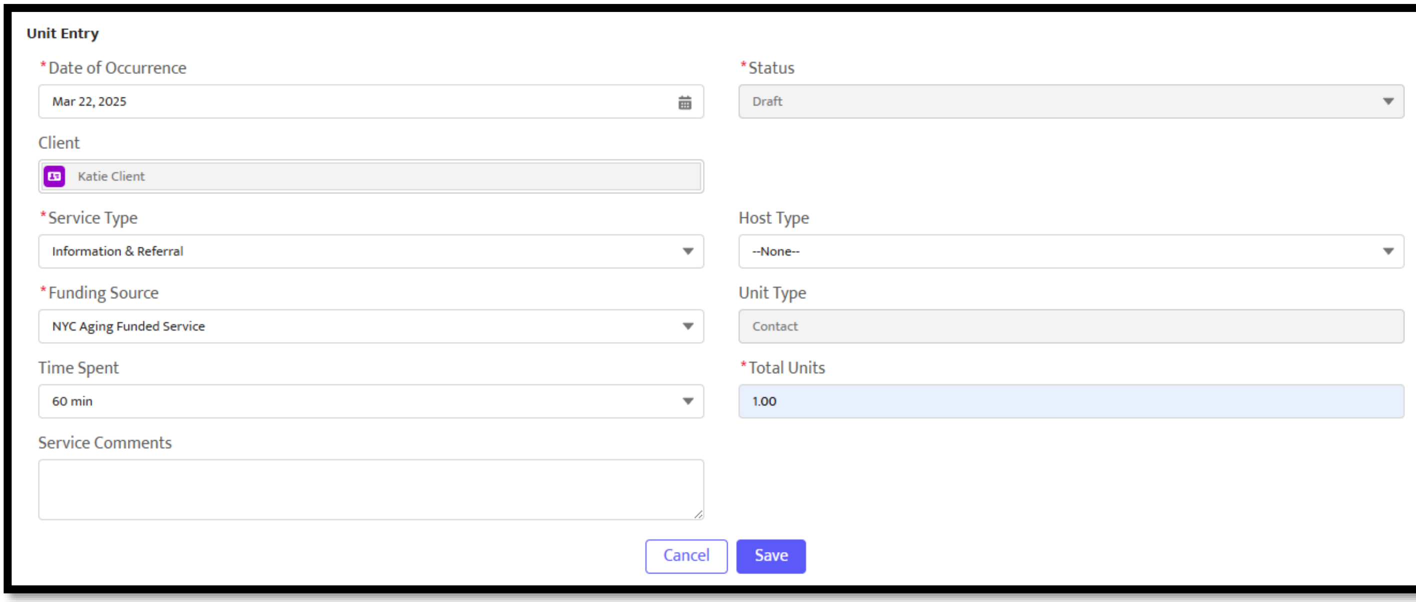
VIVÉ Knowledge Base – Unit Entry

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

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



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



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

Entering Units from the Enrollment Details Menu

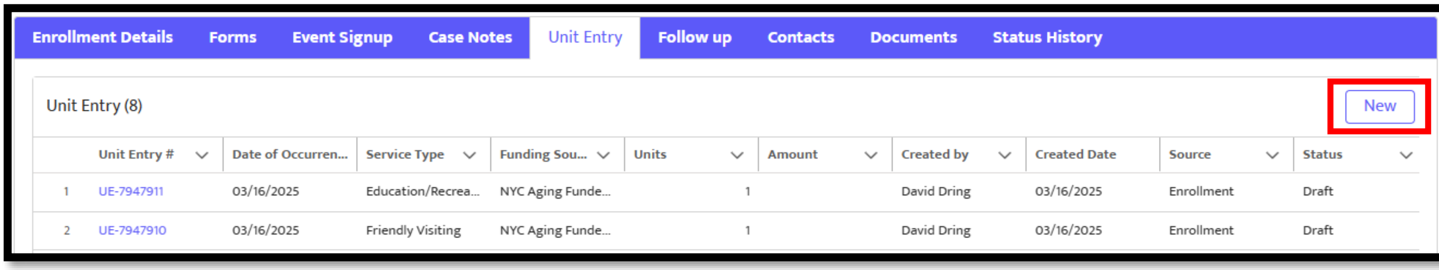
Enrollment units are specific to your programs and services. From the **Enrollment Details Menu** you are entering units specific to your client.

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

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

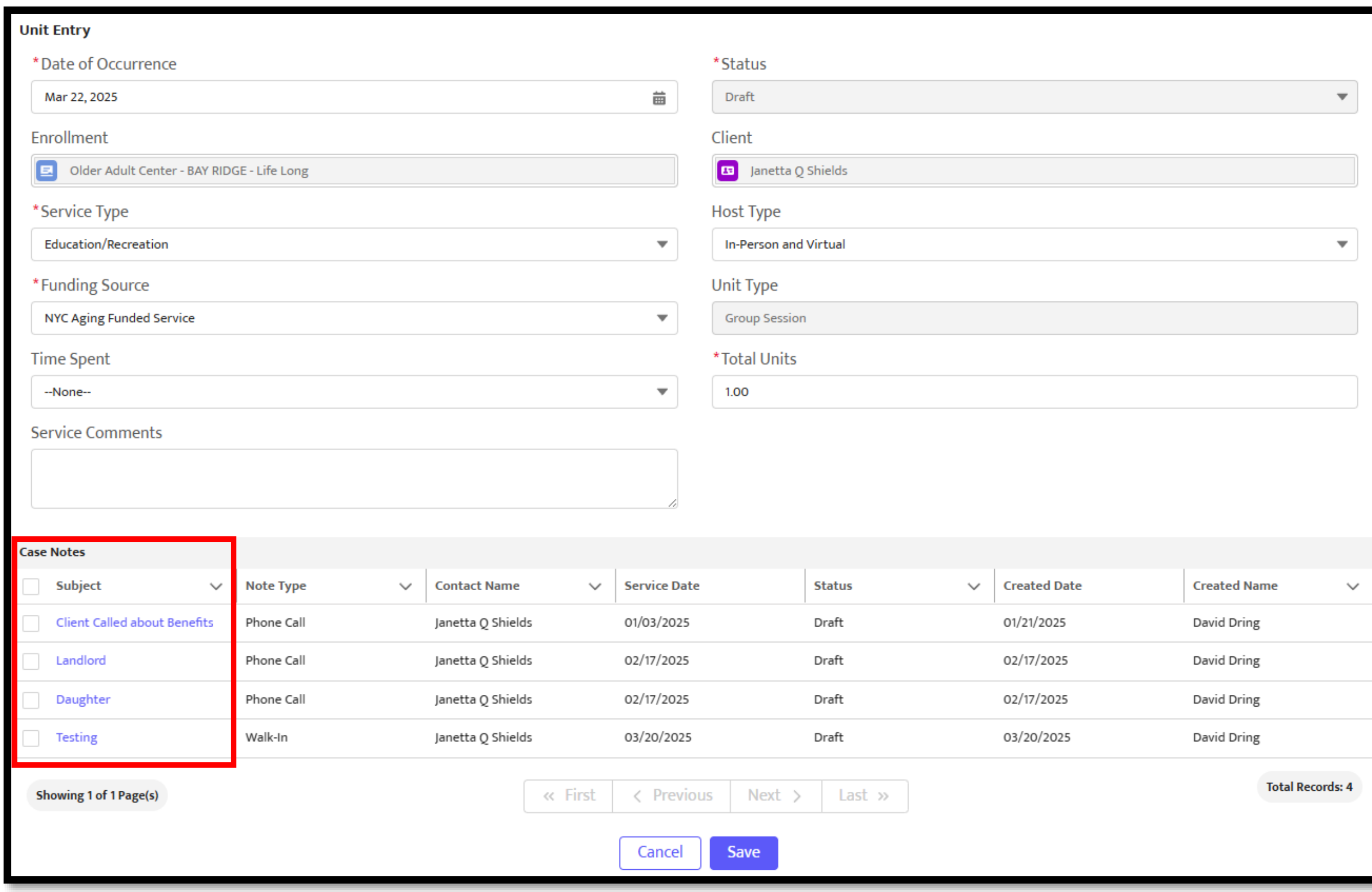
Step 4: Select the **New** button.



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

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

Step 7: Select **Save**.



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

Editing Units from Enrollment Details Menu

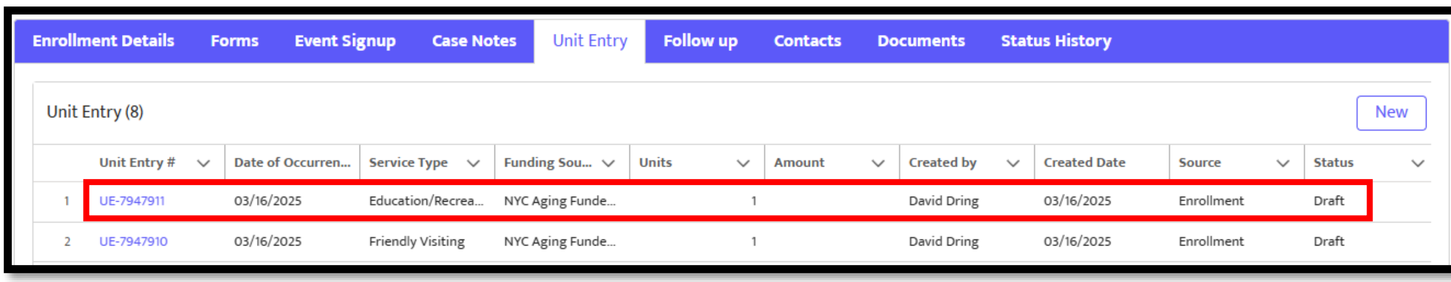
From the **Enrollment Details Menu** you are editing units specific to your client. You can only edit draft units. When units are finalized on the Monthly Unit Summary, all unit entry fields will be locked and can no longer be edited. To unlock the Monthly Unit Summary after it has been finalized, please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

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

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

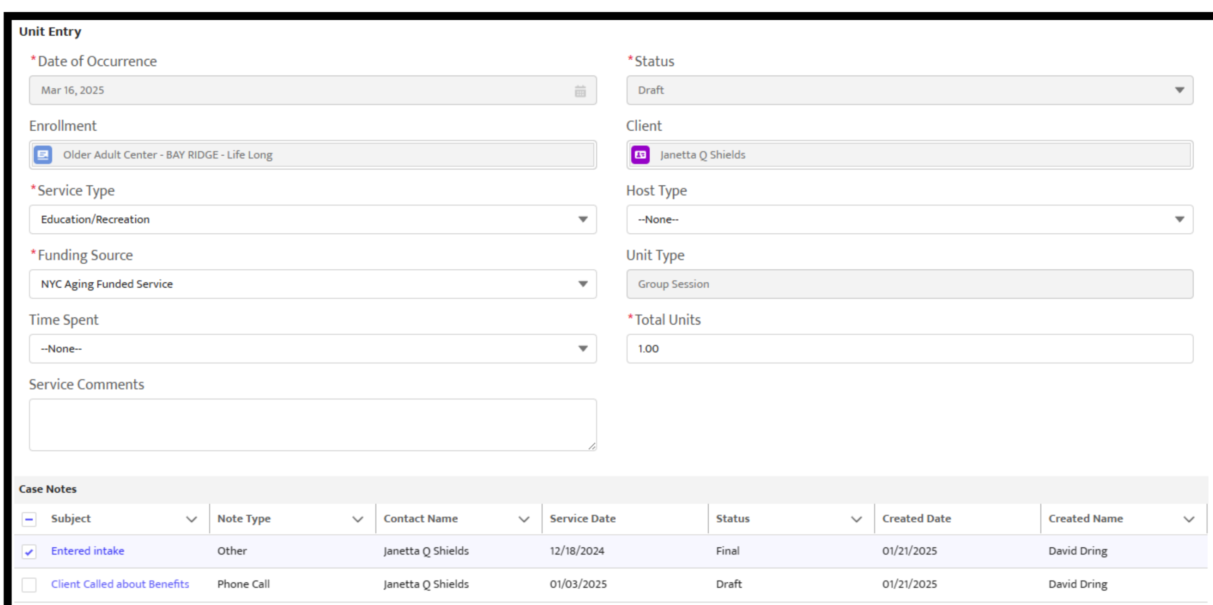
Step 3: From the **Enrollment Details Menu**, click the **Unit Entry** tab. Depending upon your window's width, you may have to select More to access Unit Entry from that dropdown menu.

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



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

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



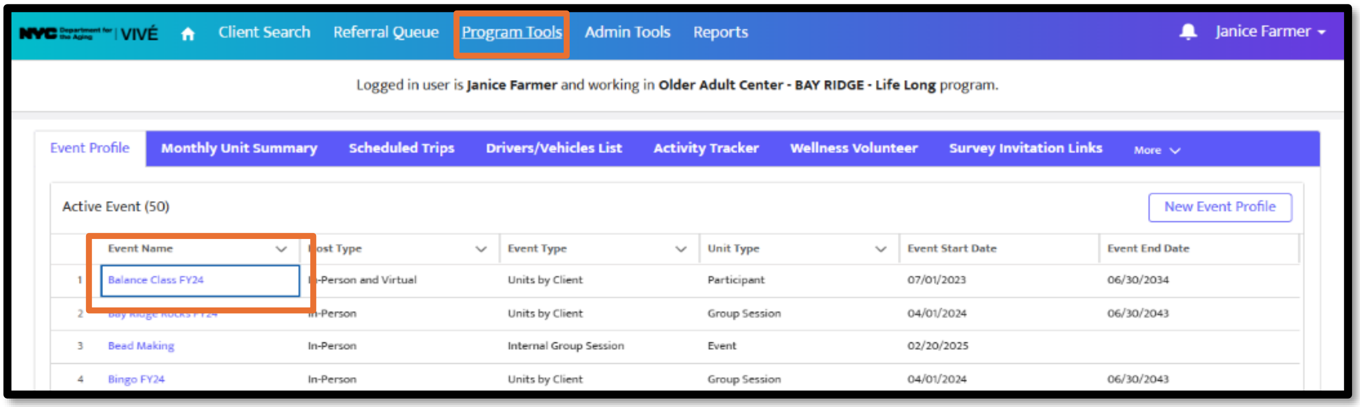
Entering Units from Program Tools

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

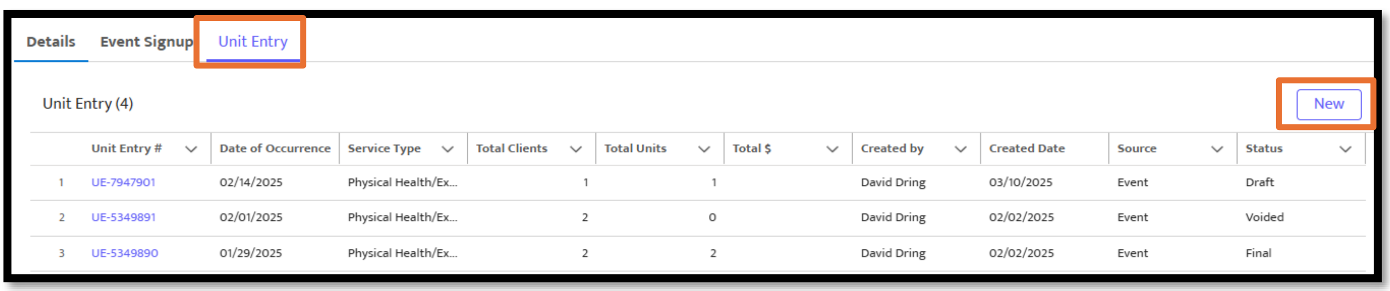
Step 1: From the **Top Menu**, click **Program Tools**.

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

Step 3: Click a Event Name link.



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



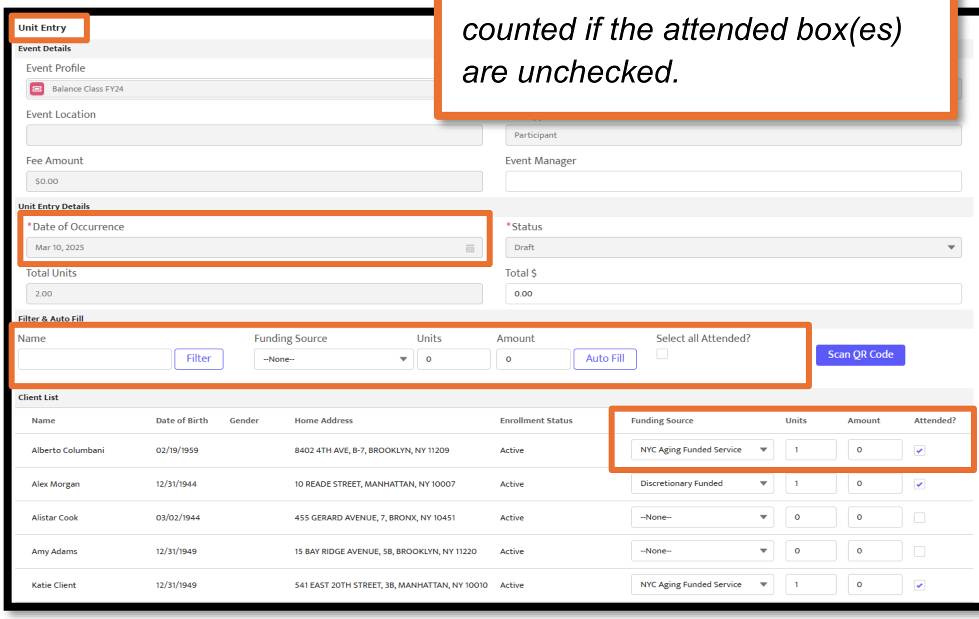
Step 5: From the **Unit Entry** Details page, add the date the event occurred. This can be backdated.

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

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

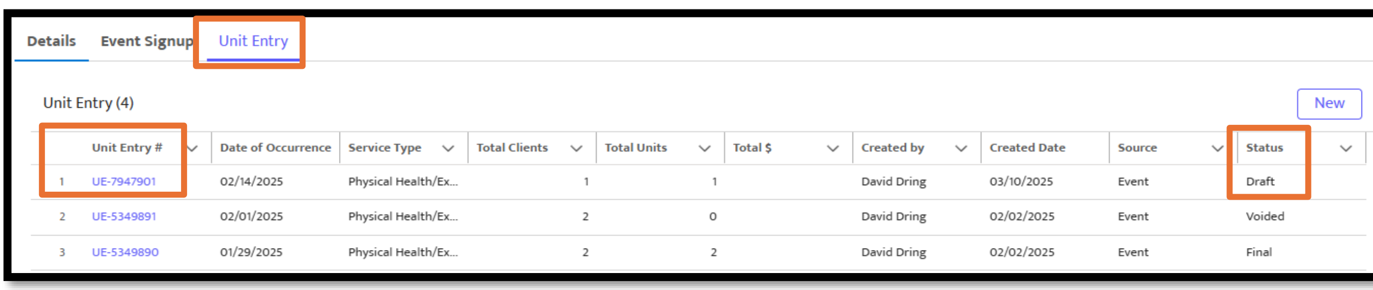
- Enter Funding Source, Units and Amount (optional) then select **Auto Fill**. Also, check the Select all Attended to mark each attended box.
- Enter the Funding Source, Units, Amount (optional) and check the attended box for each client.

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



Editing an Existing Unit Entry via Program Tools

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



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

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

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

VIVÉ Knowledge Base – Unit Entry

Entering Units by QR Code Scanning

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

Anonymous Unit Entry

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

Voiding a Unit

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

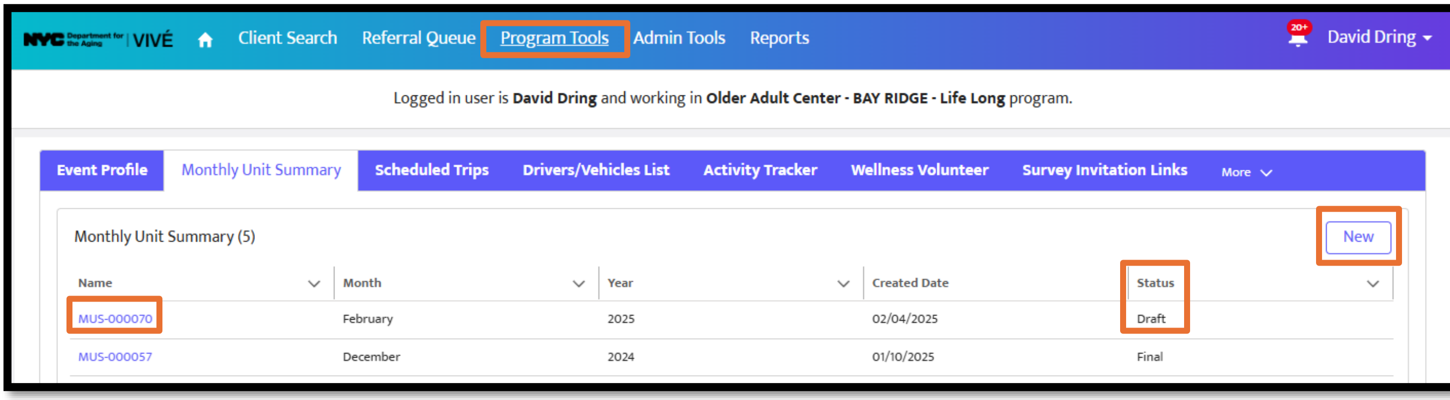
NOTE: *Once a unit is voided it cannot be edited. Therefore, it cannot be un-voided. If you need that unit, a new one would need to be created.*

Monthly Unit Summary

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

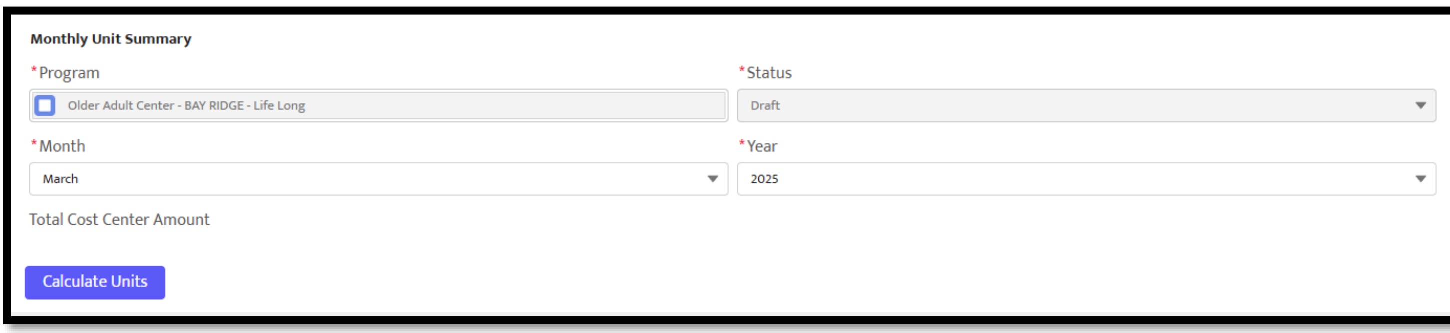
Step 1: From the **Top Menu**, click on **Program Tools**. Then click on **Monthly Unit Summary**.

[*VIVÉ Knowledge Base – Unit Entry*]



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

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



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

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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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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 Knowledge Base - Contacts](#)

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:

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:

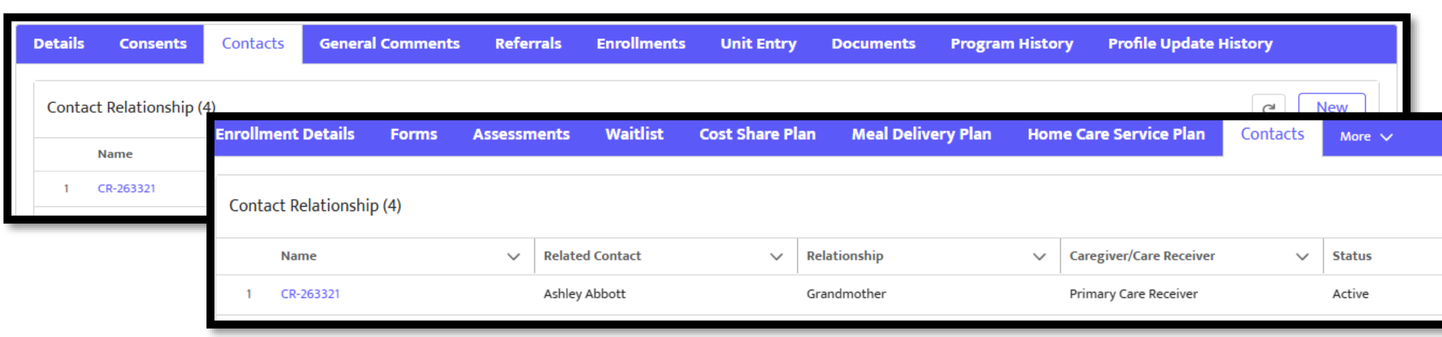
- **Client**: A person who is or has been enrolled in at least one NYC Aging program.
- **Contact**: A trusted person known to the client but not enrolled in an NYC Aging program.
- **Professional**: A service provider for the client, such as a doctor, pharmacy, or other professional.

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.



Associating Contacts with Your Client

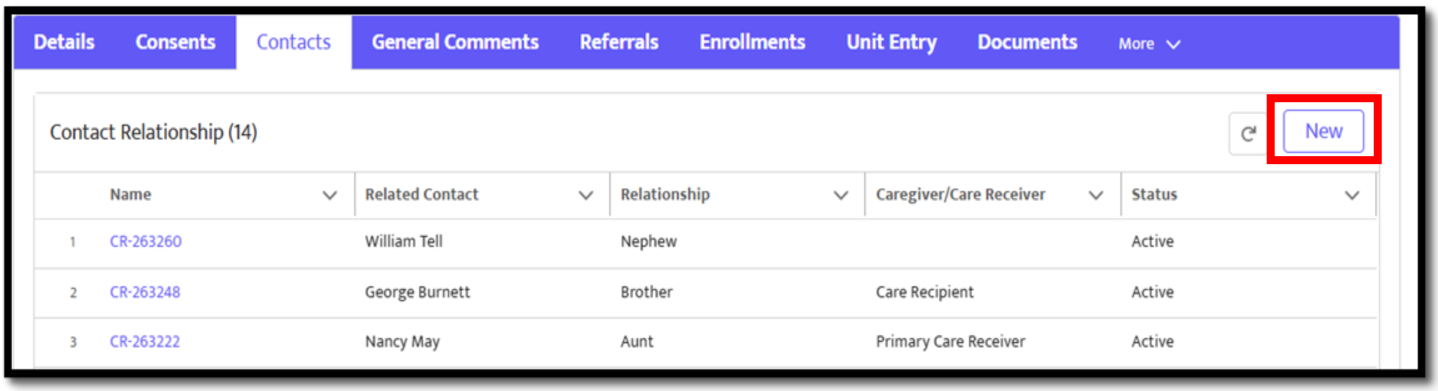
As there are three types of contacts, there are three pathways to associate them with your client. However, each of these pathways start the same way: searching for an existing contact.

First Check to See if the Contact Already Exists

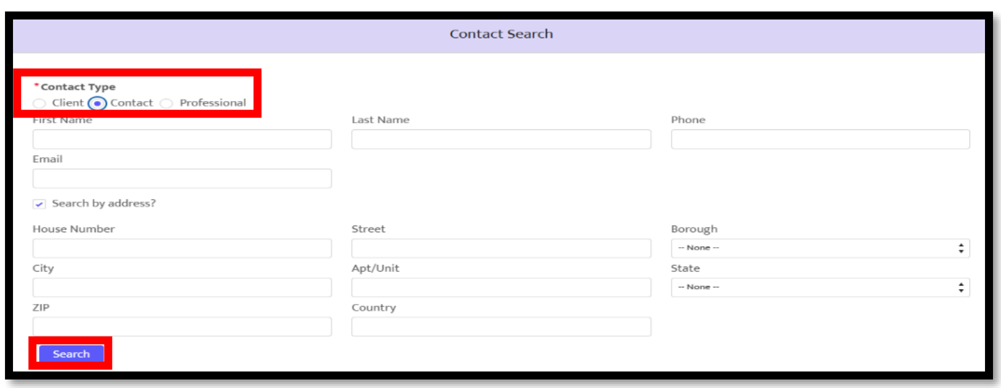
It is often the case that two or more people may have the same contact. To streamline the contact management process and before entering a new contact you need to see whether the contact is already entered.

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.

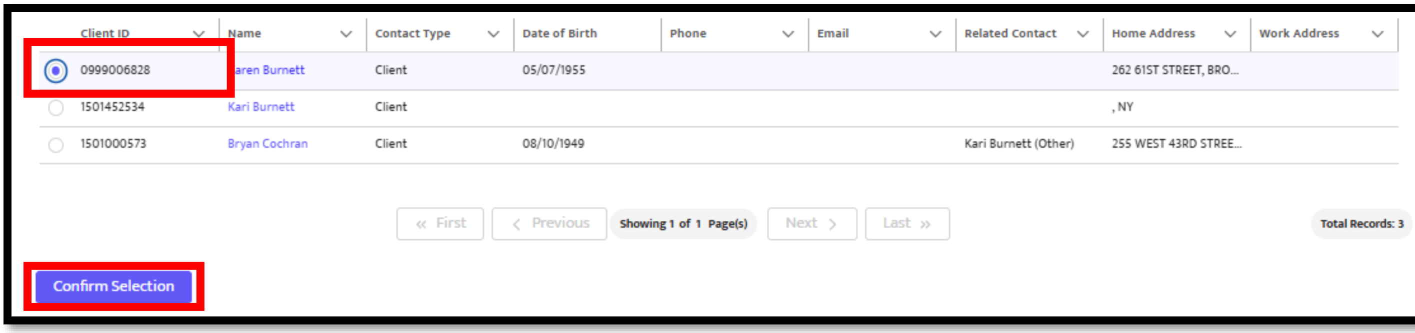


Step 3: Search to either find a match or confirm there isn't one to begin entering a new contact.

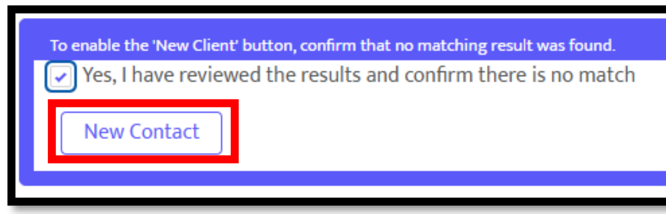


- From the **Contact Search** pop-up, select **Contact Type** by clicking the radio button next to it.
- Enter any known details about the contact (such as name, birth date phone number, etc.).
- To include a search by address, check the **Search by Address** box and enter the address.
- Select the **Search** button once all relevant information is entered.

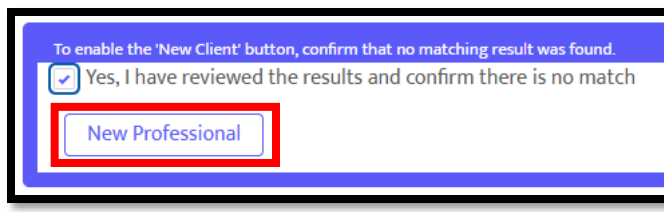
The search results for each type share the same selection process. There is a radio button to the left of an existing contact. Check that then select the **Confirm Selection** button to associate that person with your client. See below for more details on how existing contacts are associated with your client.



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.



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.



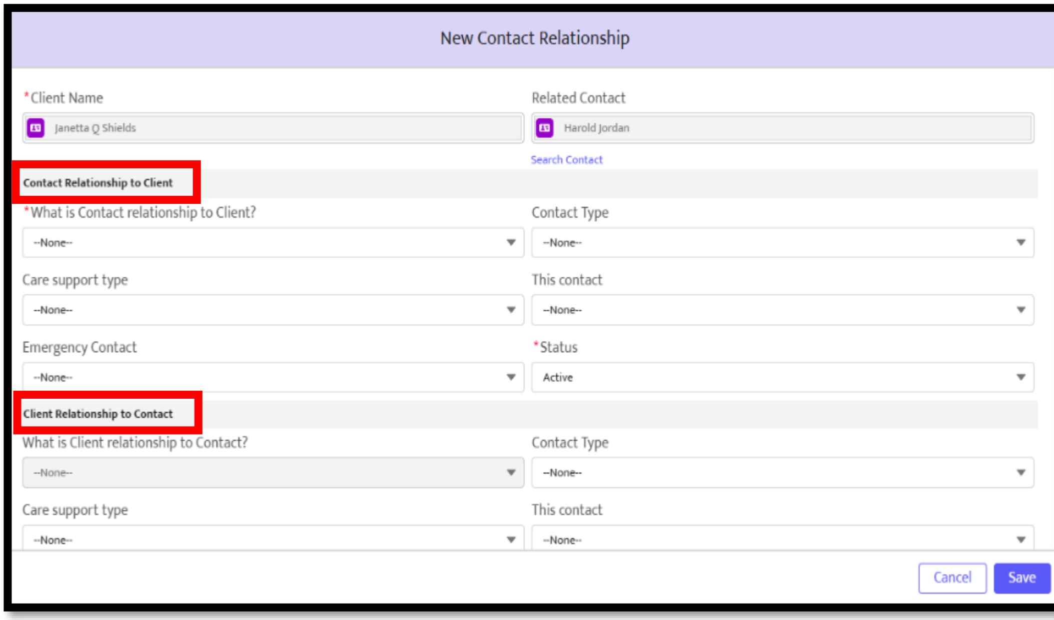
NOTE: *If the contact is not found via a Client type search, then proceed to searching the other types. You can search for only one type of contact at a time. Also, you are not able to enter a new client via Contacts.*

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.



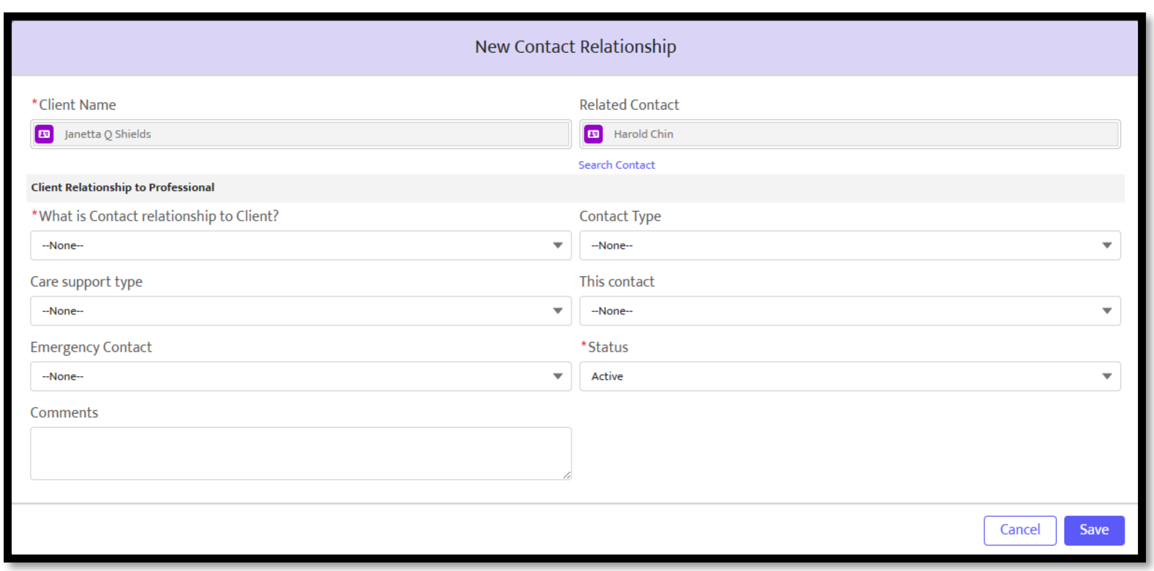
NOTE: *When you add a Client as a contact for another client, the relationship is reciprocal—the added client will also have the original client listed as their contact*.

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.

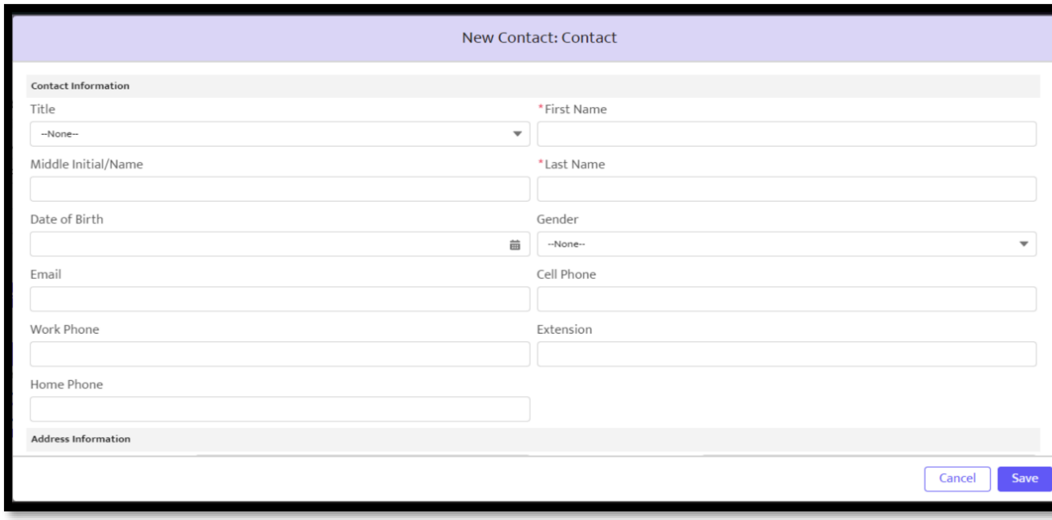


Entering in New Contacts

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.

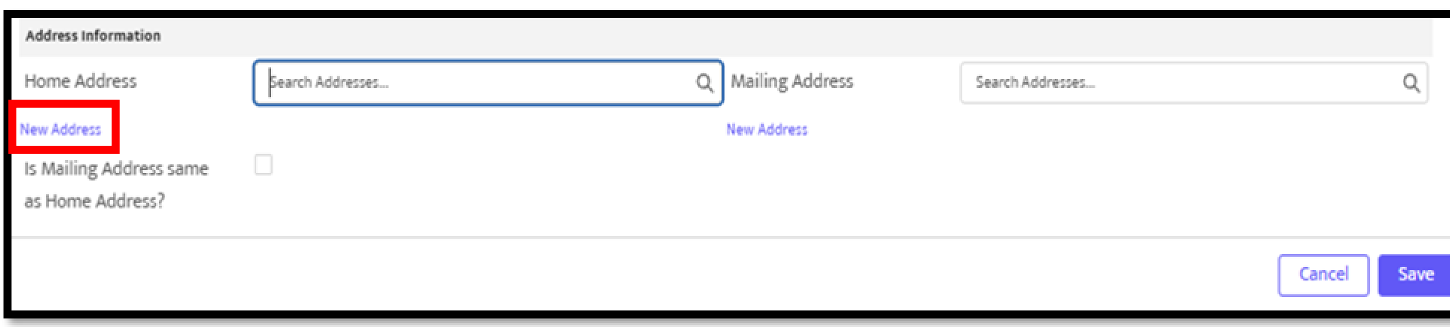
Step 1: After confirming no matches and selecting the New Contact button, complete the New Contact: Contact pop-up.



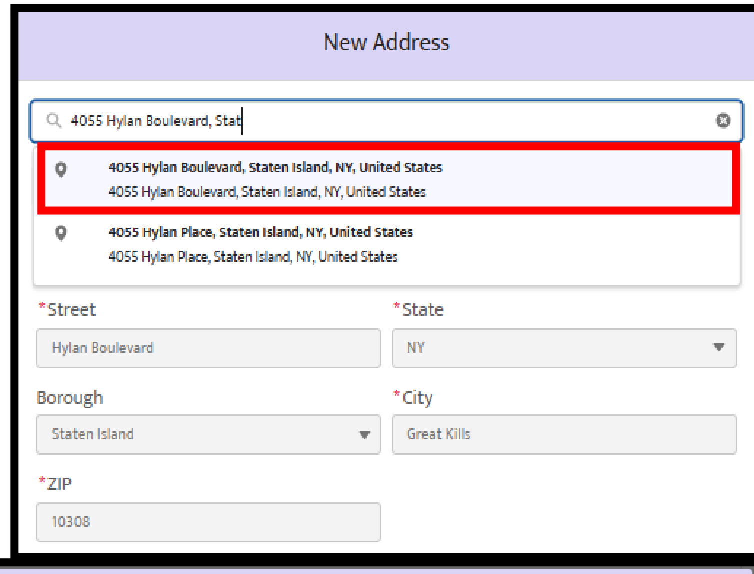
Step 2: While not required, it's best practice to always enter a phone number and an email address.

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**.

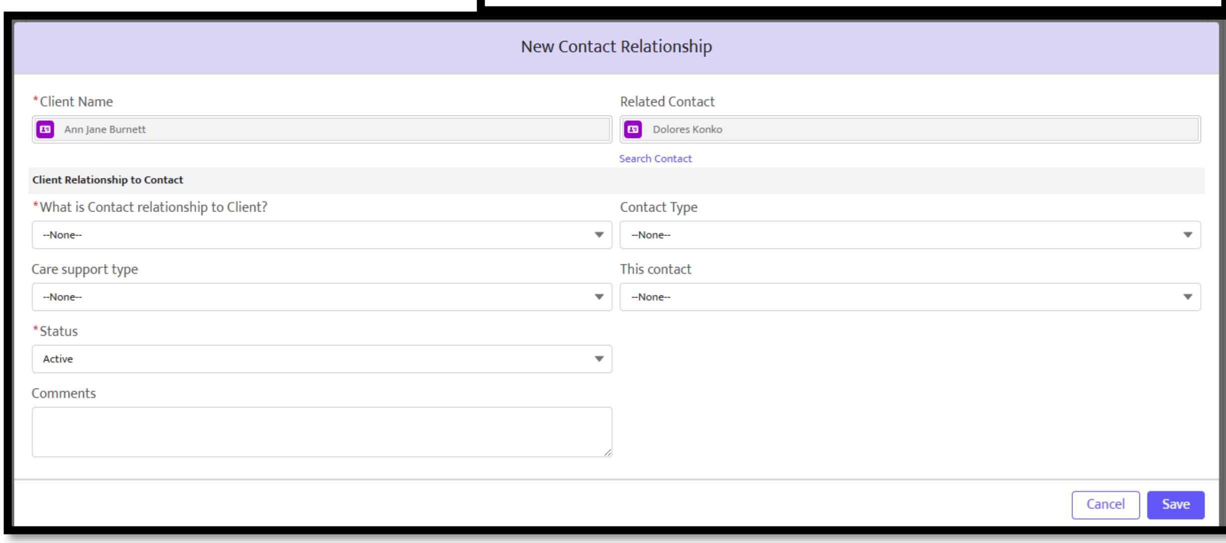


Step 5: When entering a new address, the type-ahead technology speeds finding address. Once you've found it, click on it and the details will autofill the fields. Review the entry to be sure all information is included, especially apartment information.



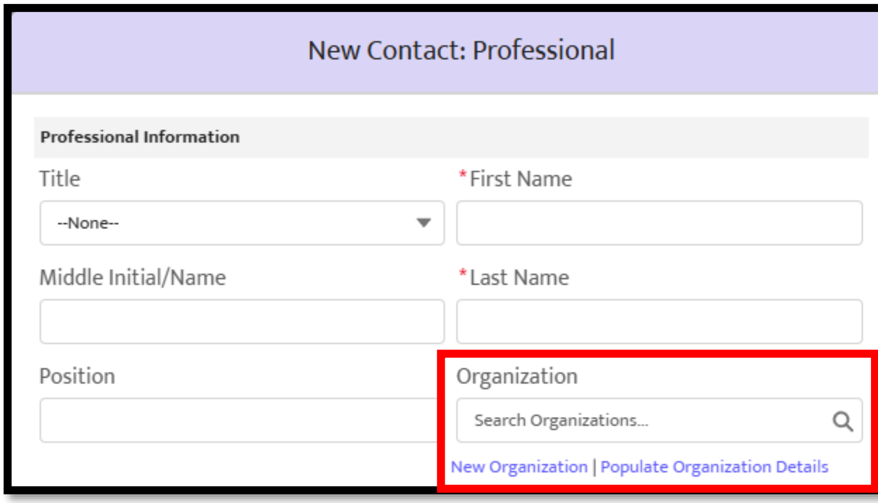
Step 6: Follow the similar process for Mailing Address. Or if they are the same, check the box that Mailing Address is the same as Home Address.

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



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.

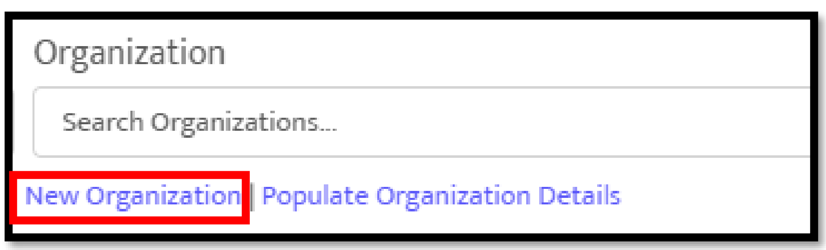
Step 2: While not required, it's best practice to always enter a phone number and email address.

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

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

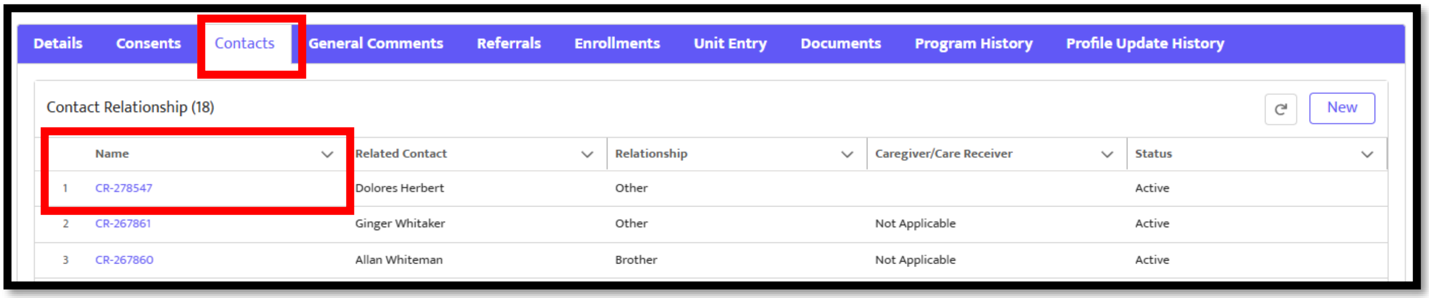
Enter a New Organization

- 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.

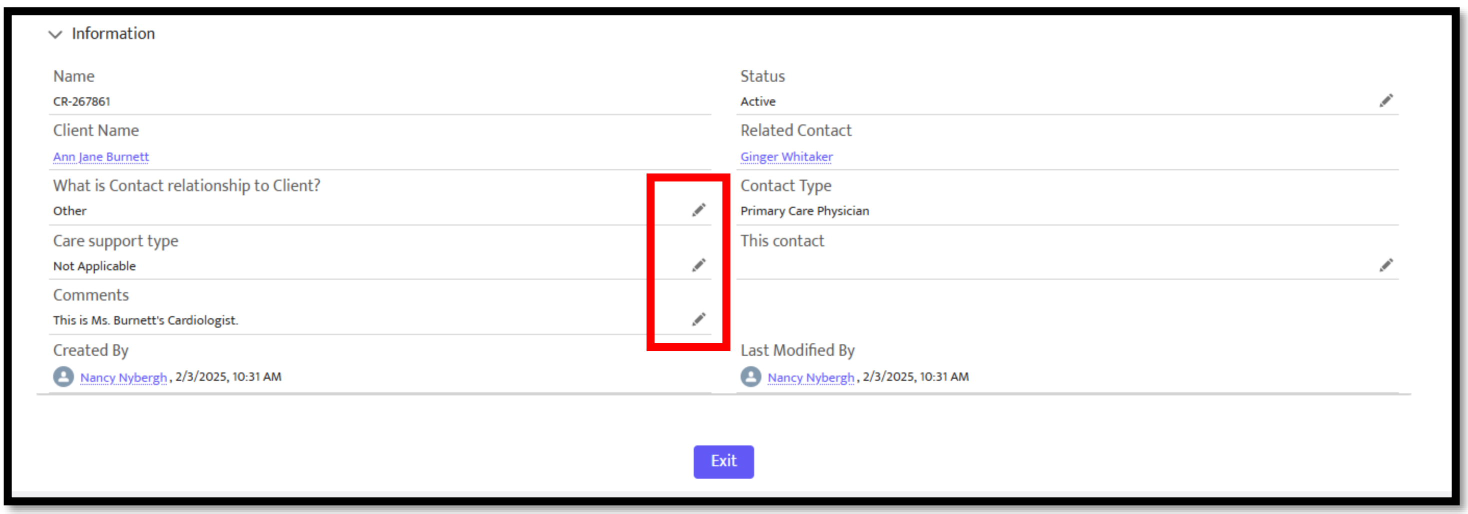


Editing Contacts

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



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.



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:

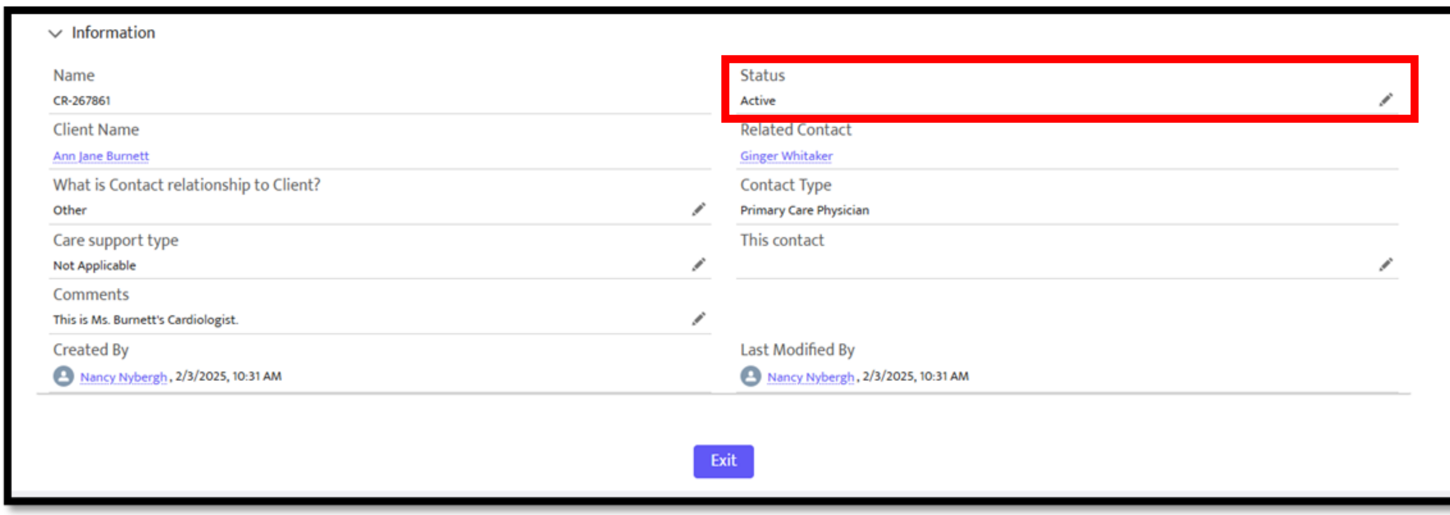
- The contact is no longer a valid contact for the associated client. However, if the contact is associated with other clients that status remains the same.

[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**.



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.

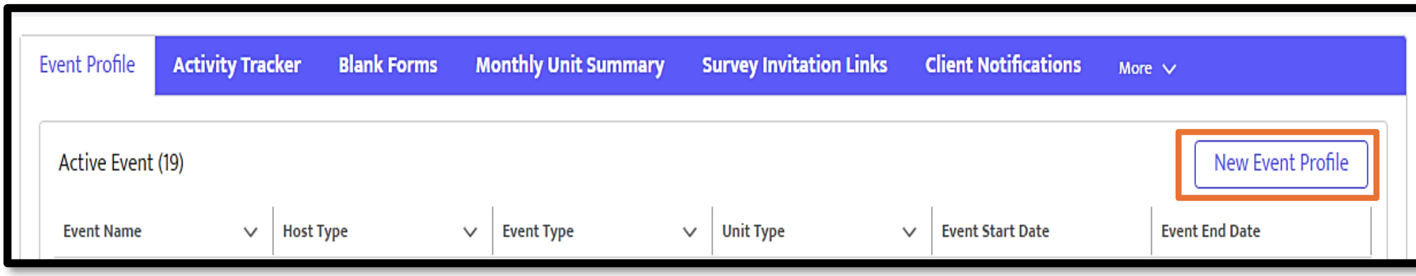
You may access this guide from the VIVÉ Knowledge Base or from a program specific reference guide. At the beginning and end of this document is a link to return to the VIVÉ Knowledge Base. You can also use your browser's back button to return to the program reference guide.

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.

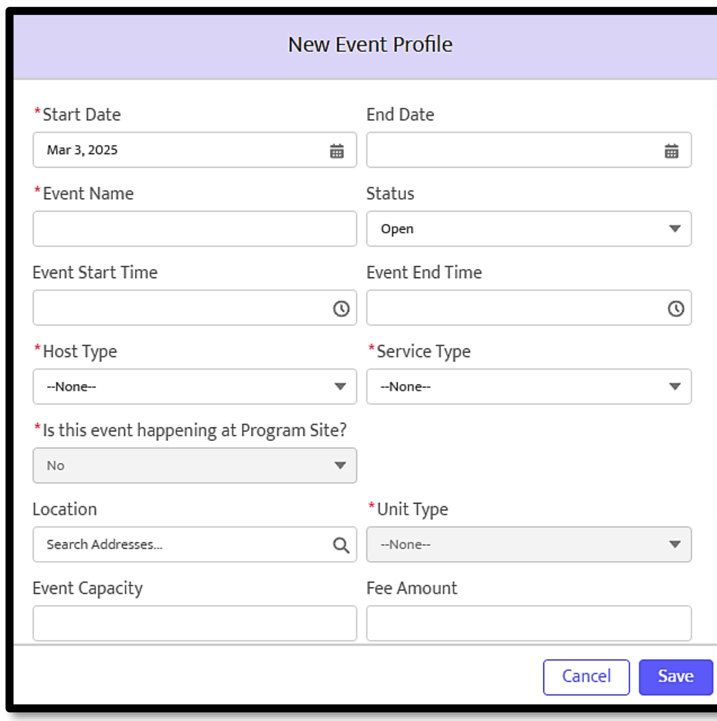
In this guide you will learn:

Creating Events

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).

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

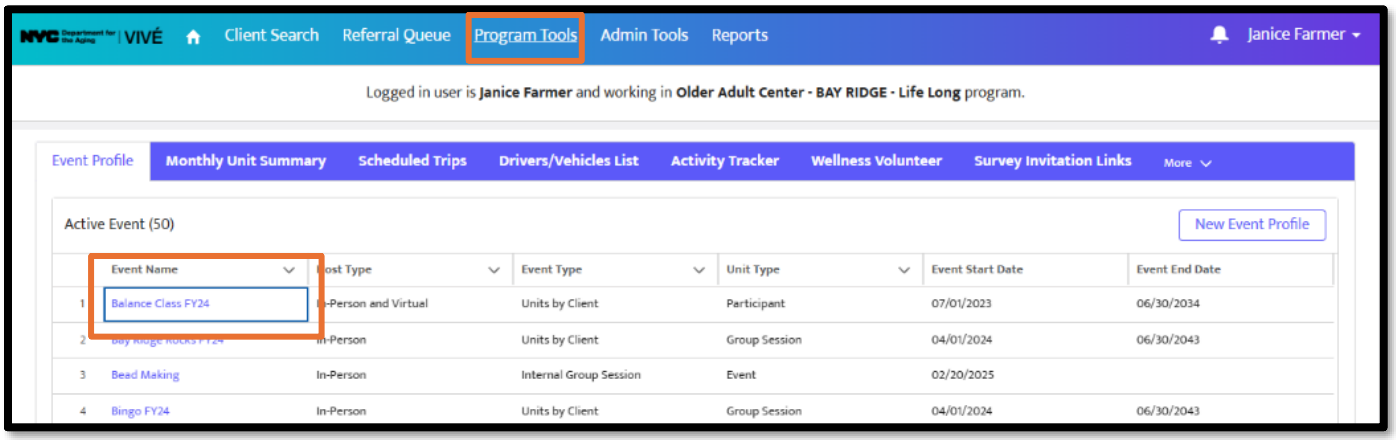
There are three ways to sign up a client enrolled in your program for an event.

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

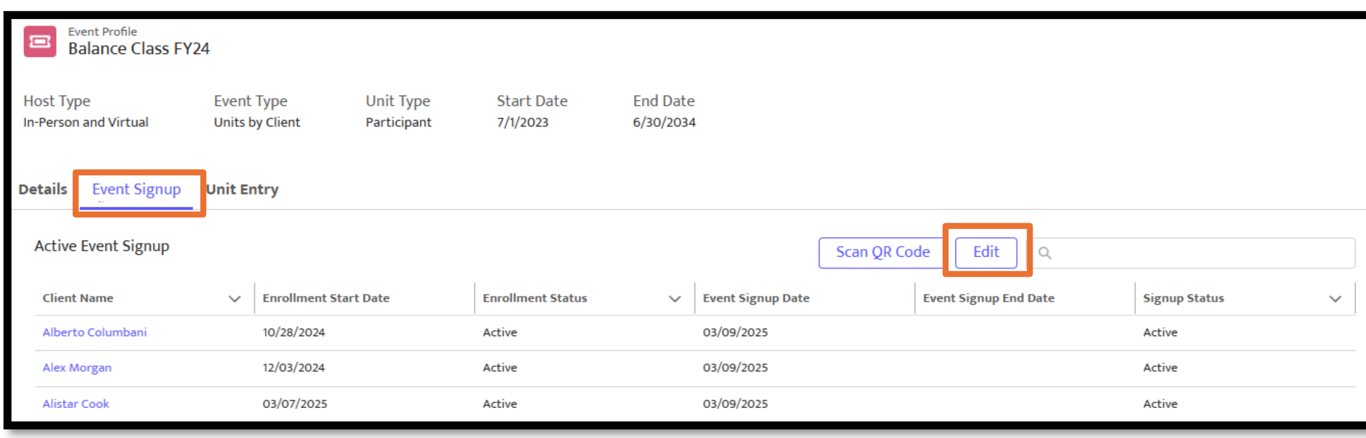
Signing up & Removing Clients via Event Profile

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.

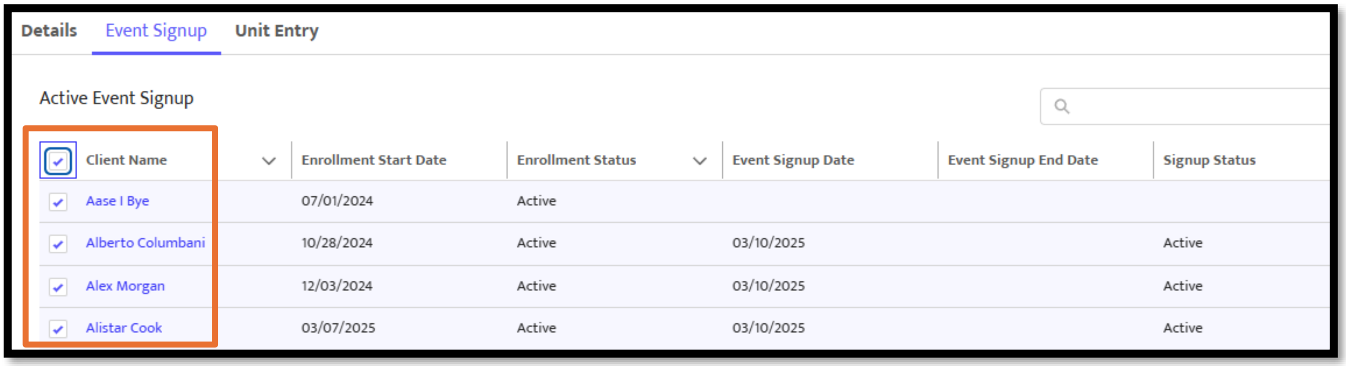


Step 3: Click **Event Signup**.



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
Aase I Bye	07/01/2024	Active			
Alberto Columbani	10/28/2024	Active	03/10/2025		Active
Alex Morgan	12/03/2024	Active	03/10/2025		Active
Alistar Cook	03/07/2025	Active	03/10/2025		Active

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

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

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

Remove Client via Event Profile

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

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

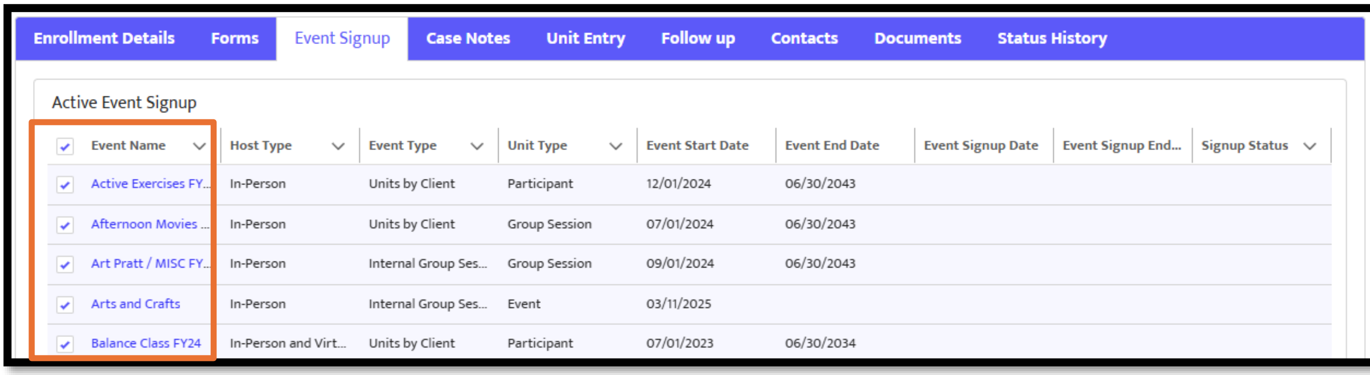
Sign up & Removing Clients via Enrollment Details Menu

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

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

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

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



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

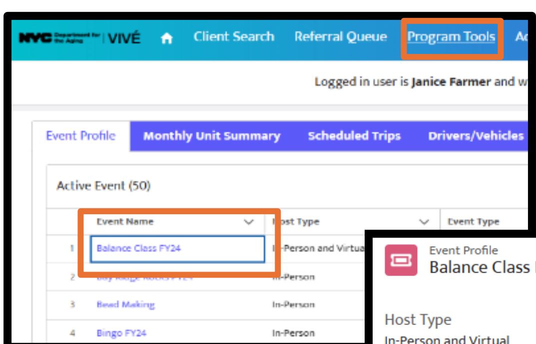
To remove a client from that event, uncheck the box to the left of their name.

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.

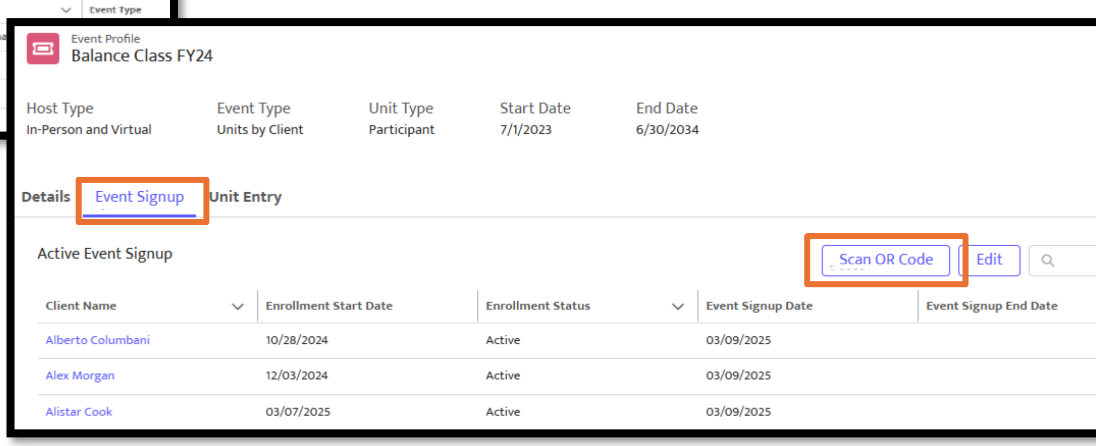
> **NOTE:** *The client needs to be enrolled in your program before using the QR Code scanning.*

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



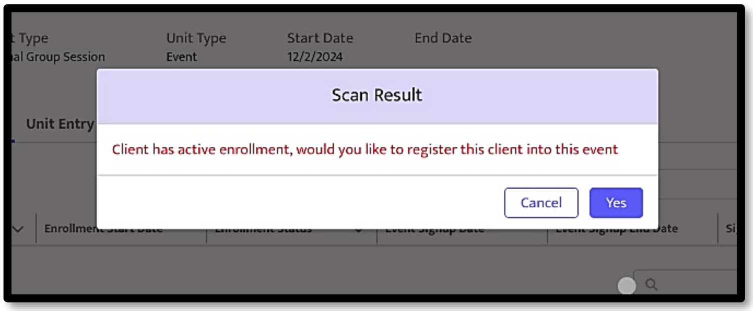
Step 2: From **Program Tools**, click **Event Profile**. Then click the link to the name of the event you wish to view.

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



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:

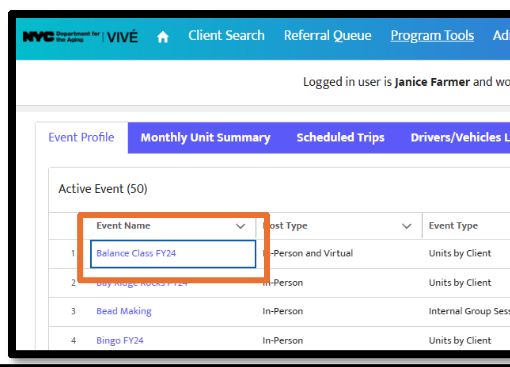
- Entering units from the **Events Profile** (good for entering units quickly for multiple clients).
- Entering a unit for a client from the **Enrollment Details** Menu.
- By using the **Scan QR Code** feature (most accurate way to enter units).

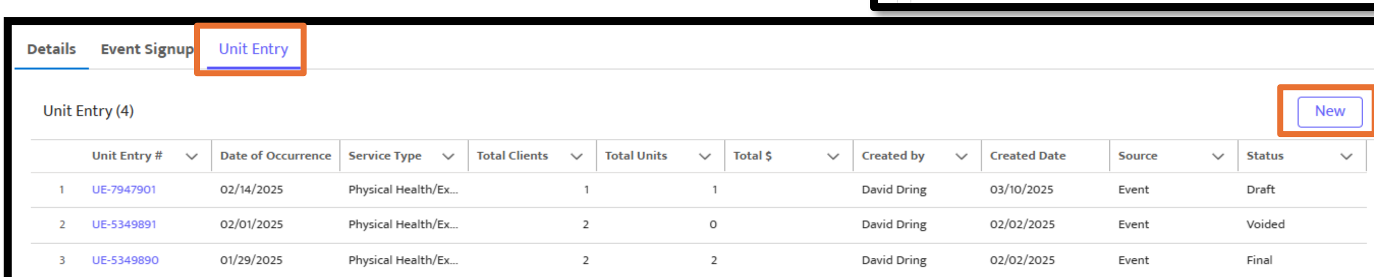
Entering Units from the Events Profile

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.





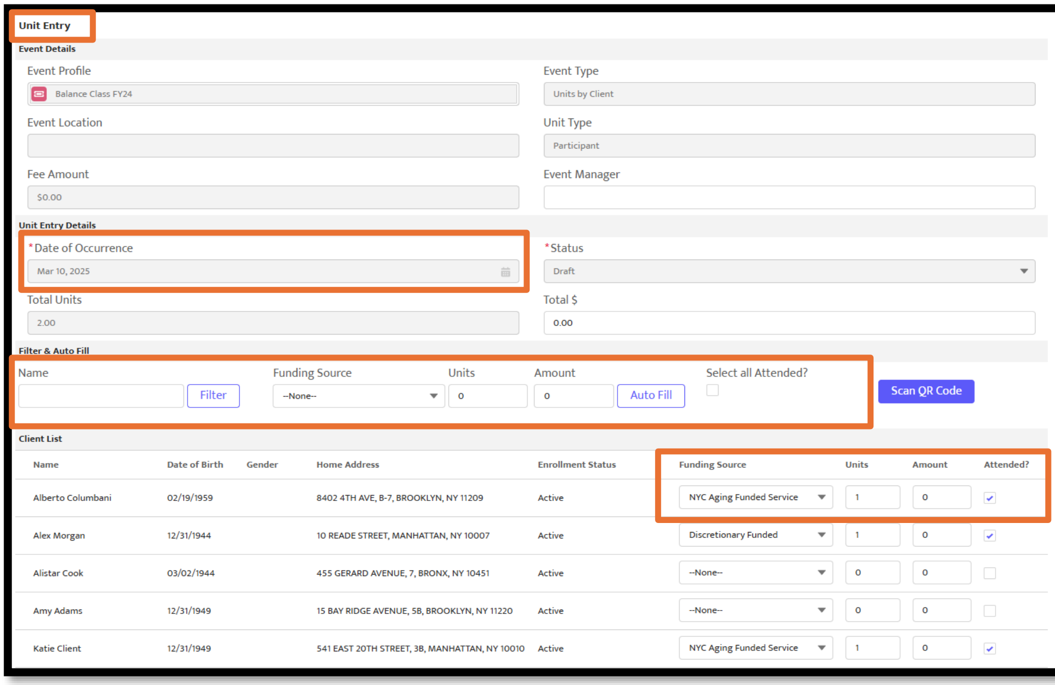
	Unit Entry #	Date of Occurrence	Service Type	Total Clients	Total Units	Total $	Created by	Created Date	Source	Status
1	UE-7947901	02/14/2025	Physical Health/Ex...	1	1		David Dring	03/10/2025	Event	Draft
2	UE-5349891	02/01/2025	Physical Health/Ex...	2	0		David Dring	02/02/2025	Event	Voided
3	UE-5349890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

Step 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.

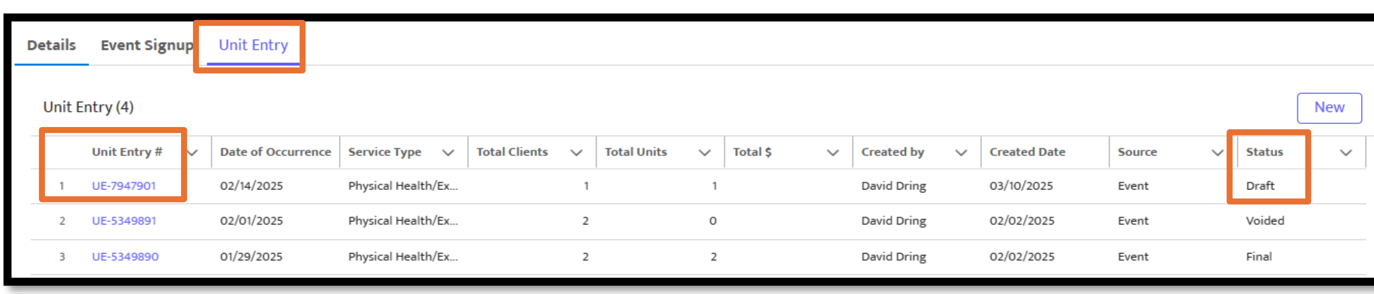


- Enter Funding Source, Units and Amount (optional) then select **Auto Fill** if it is the same for everyone. Also, check the Select all Attended to mark each attended box.
- Enter the Funding Source, Units, Amount (optional) and check the attended box for each client.

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.



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.

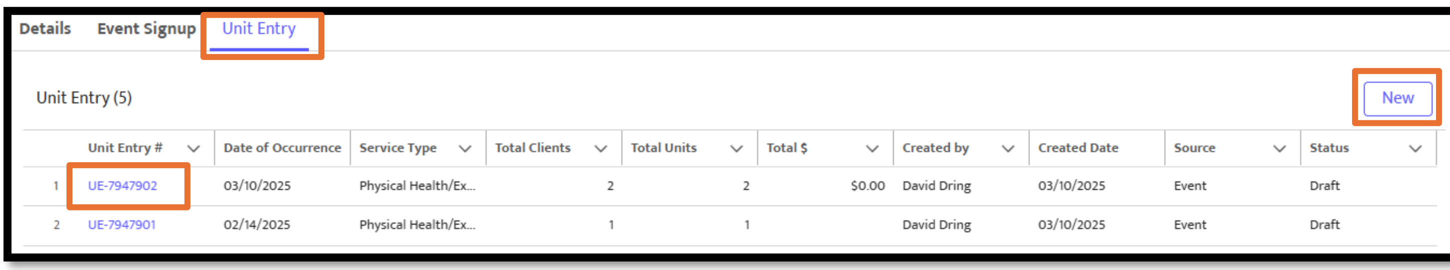
Enter Units By Scanning QR Codes

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.

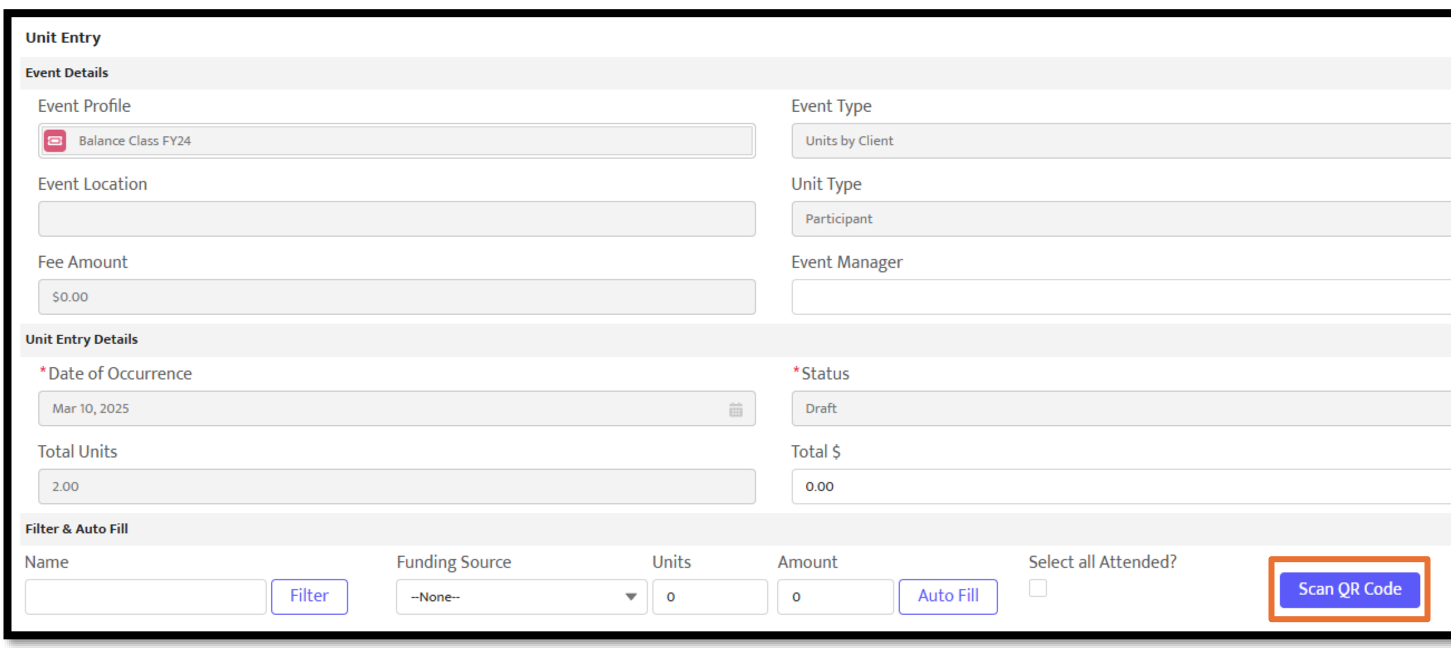
Step 2: Click on the event you want to scan clients into.

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



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

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

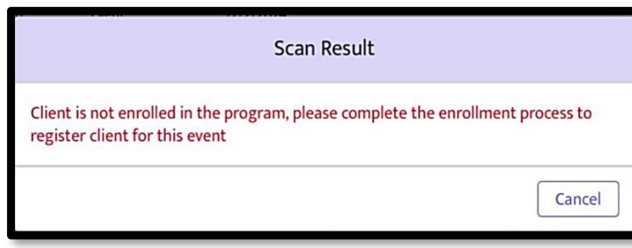


Step 6: A windowpane appears showing the image from the back facing camera. Maneuver the camera so that the member's ID card is clearly within the windowpane.

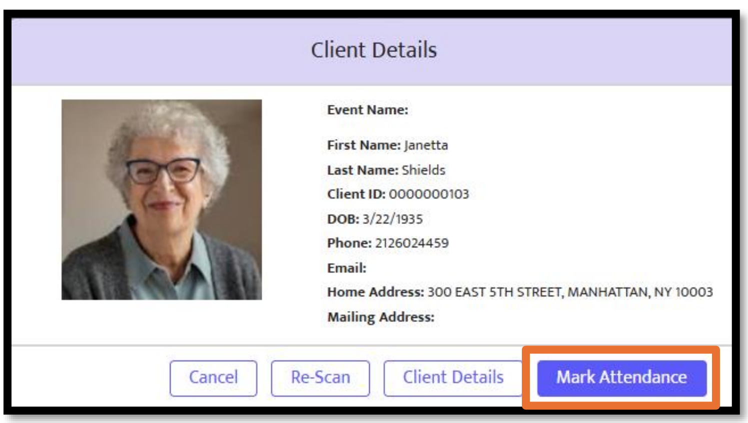
Step 5: If the client's QR Code is recognized, a confirmation pop-up will appear. From this pop-up you can Cancel, Rescan, view the client's details or Mark Attendance.

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.

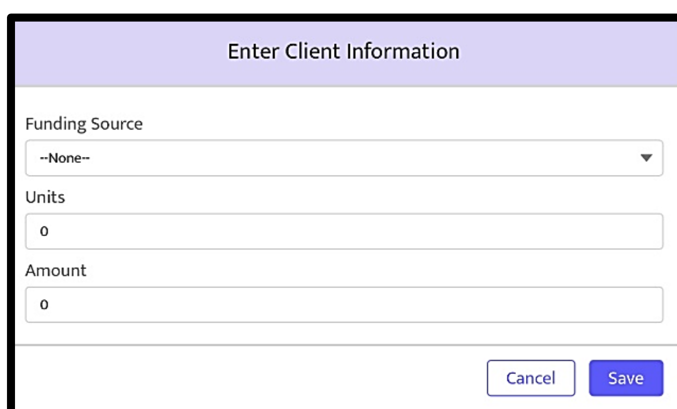


Step 7: If you select the **Mark Attendance** button, a pop-up will appear to finalize the unit entry.



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

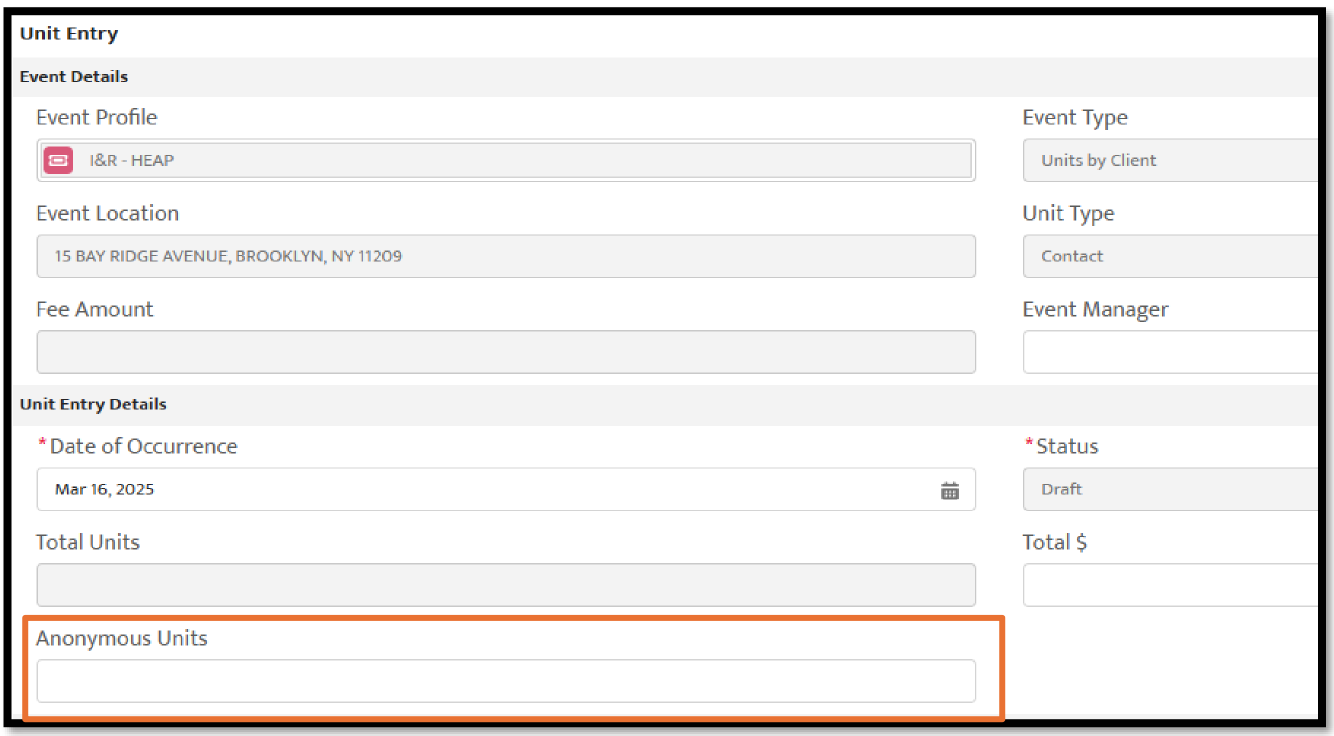
Step 1: From the Top Menu, click Program Tools. From Program Tools, click the Event Profile tab.

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

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

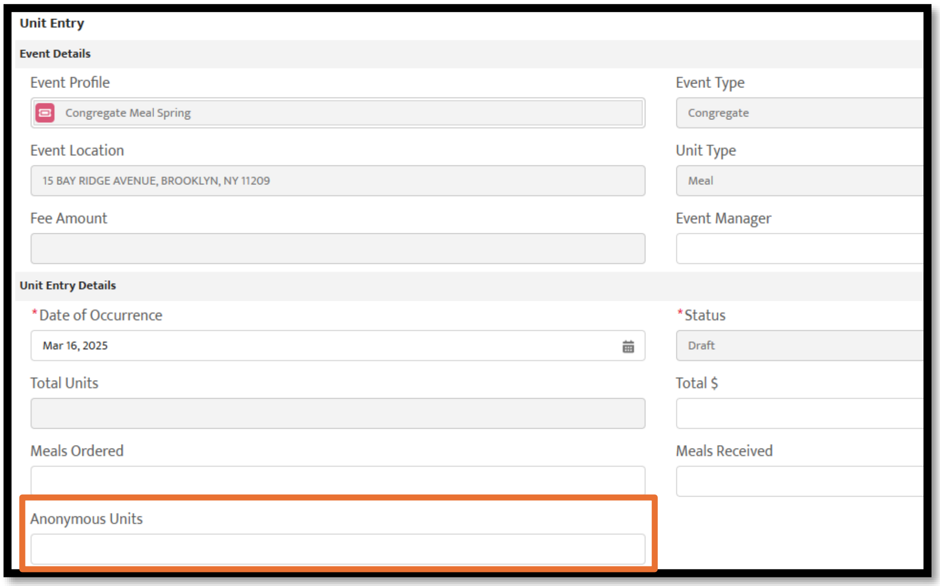
Step 4: Select the New button.

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



Entering Anonymous Meal Units

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



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

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

Step 4: Select the New button.

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

NOTE: *There are no anonymous clients allowed.*

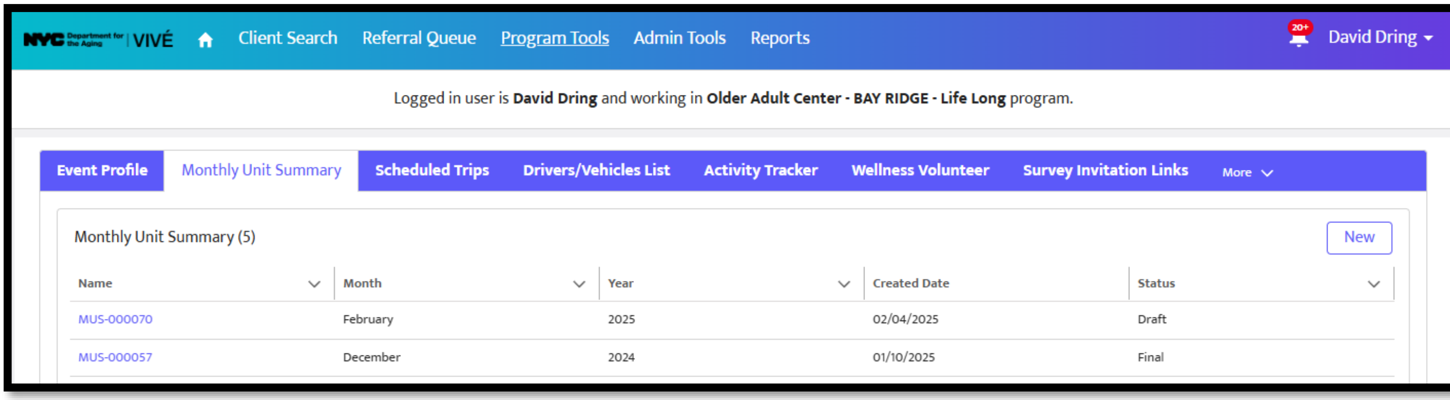
Entering Meals Provided for Other Eligible Seniors, Ineligible Meals and Eligible Volunteers

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

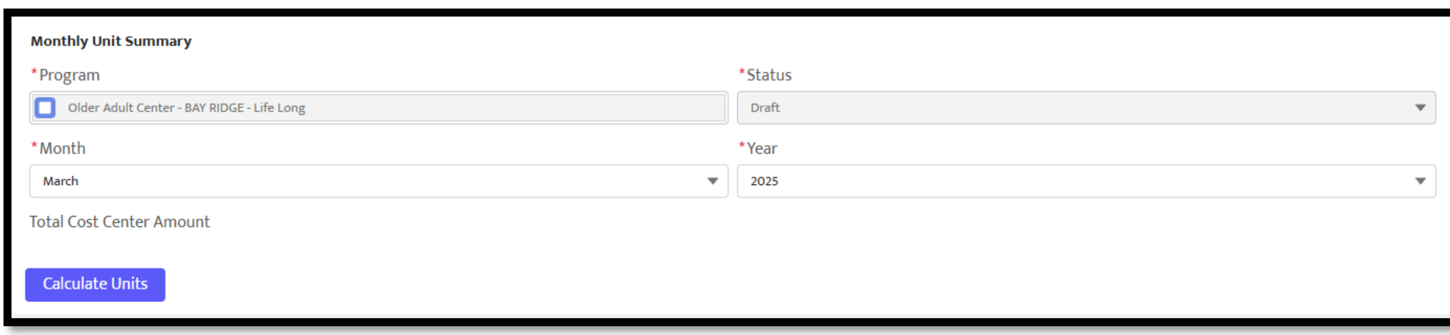
Monthly Unit Summary

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.



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.



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.**

VIVÉ Knowledge Base – Referral

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:

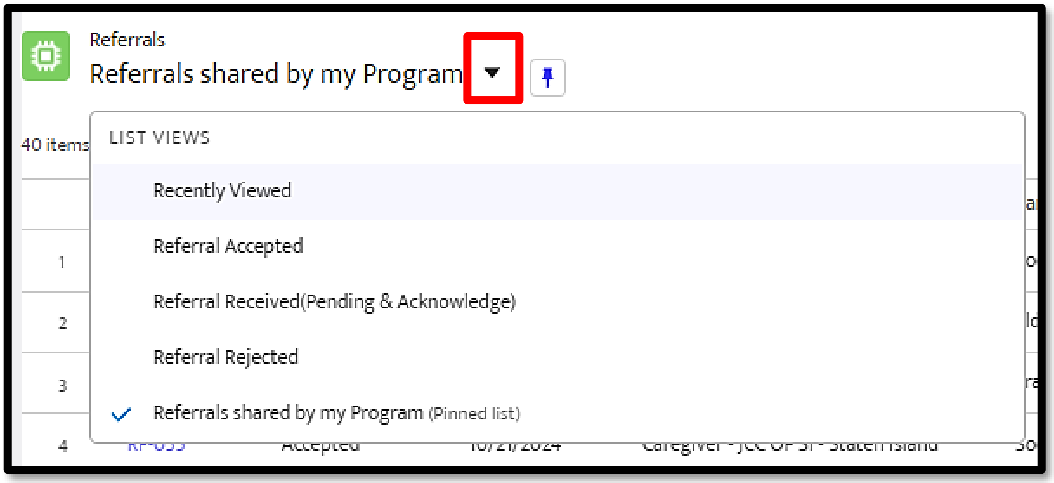
Overview of Referrals

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

Viewing Referrals

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

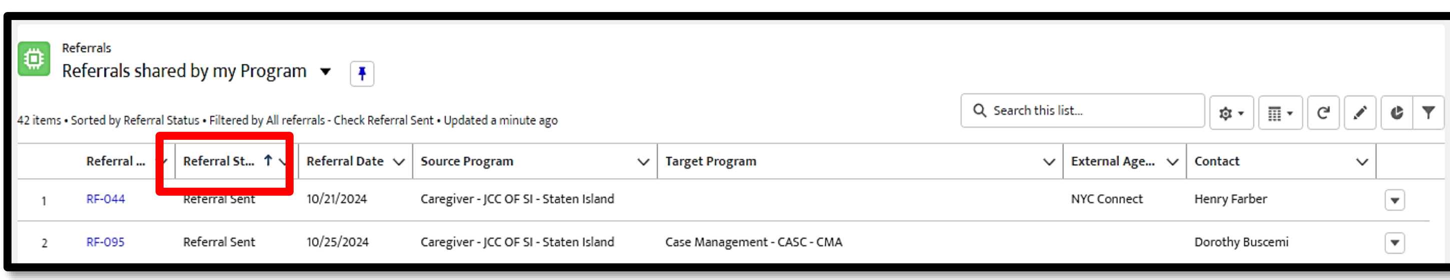
The Referral Queue displays referrals based upon status. You can pin your default view.



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

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

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

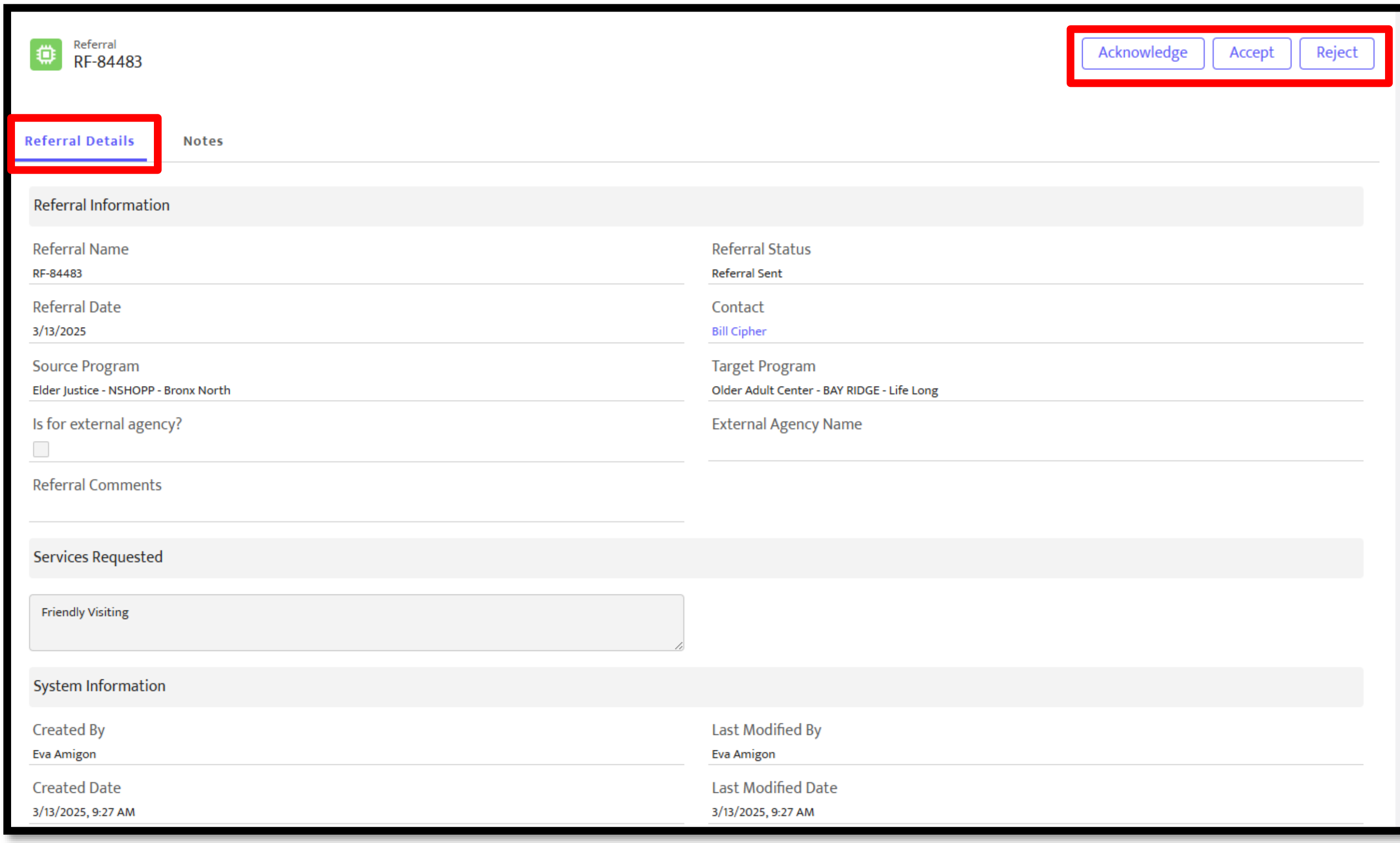


Referral Details

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

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

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

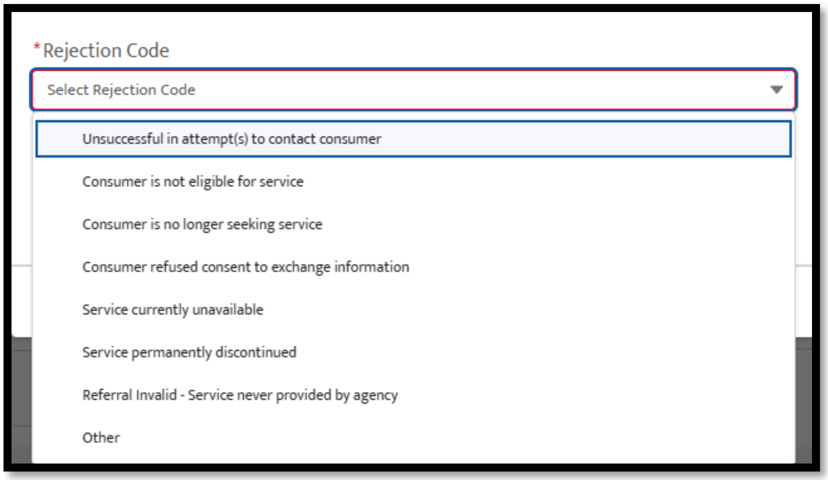


Accepting an Enrollment

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.**

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.



Cancelling a Referral

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

Referral Notes

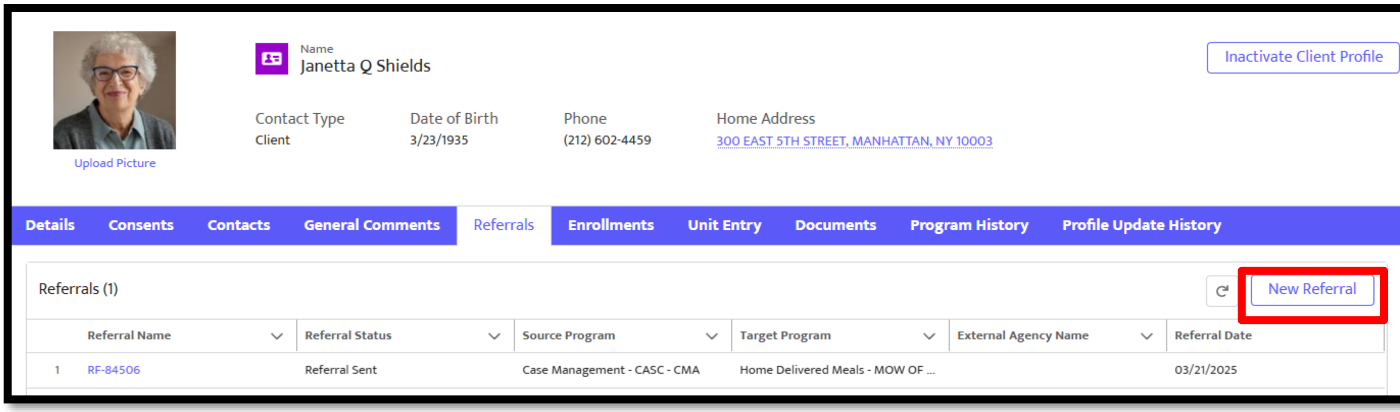
All referrals have a **Notes** tab. These notes are seen by both the source and target programs. A user may search and filter the notes of this specific referral.

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.

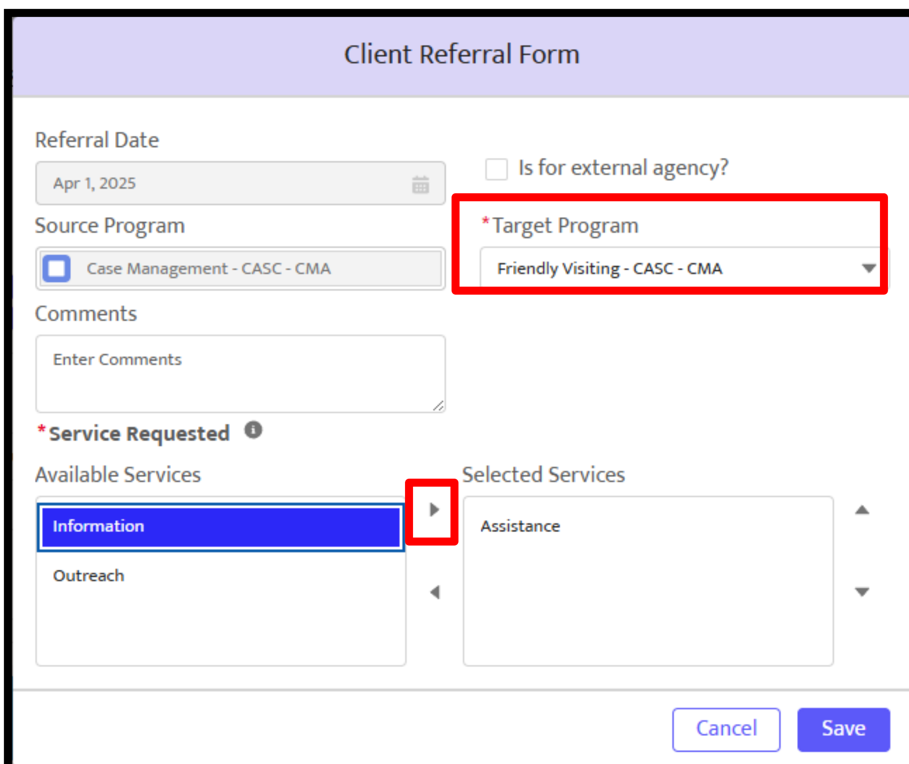
Step 2: Select the **New Referral** button.



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.

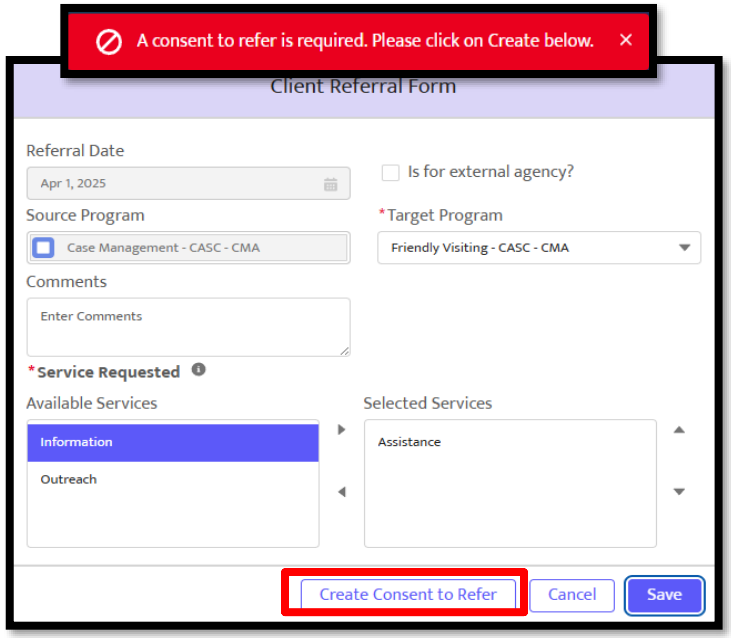
Step 4: Click on a desired Available Service and then select the right facing triangle to inform the Target Program of client's needs.

Step 5: Select **Save**.



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.

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 Knowledge Base – Dashboard

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.

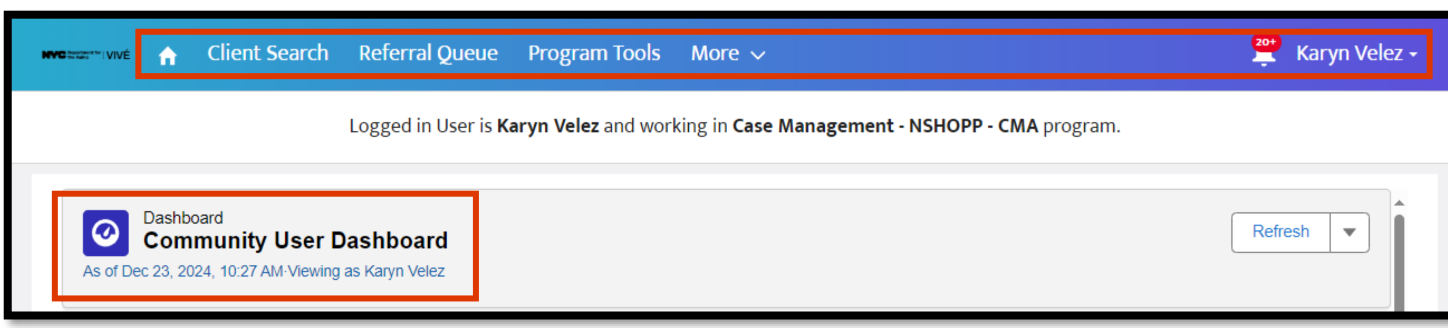
In this guide you will learn:

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.

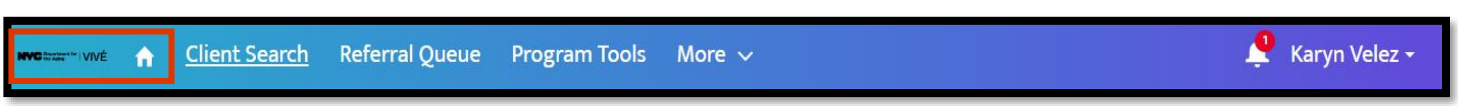
The **Dashboard** will be the first page to appear once you have logged into VIVÉ. Below are details of key navigational elements and details of their features.



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.



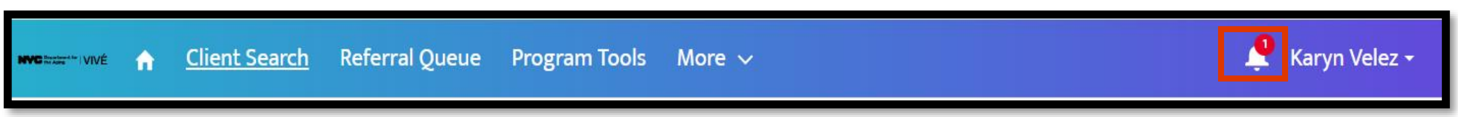
[VIVÉ Knowledge Base – Dashboard]()

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

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

Notifications

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

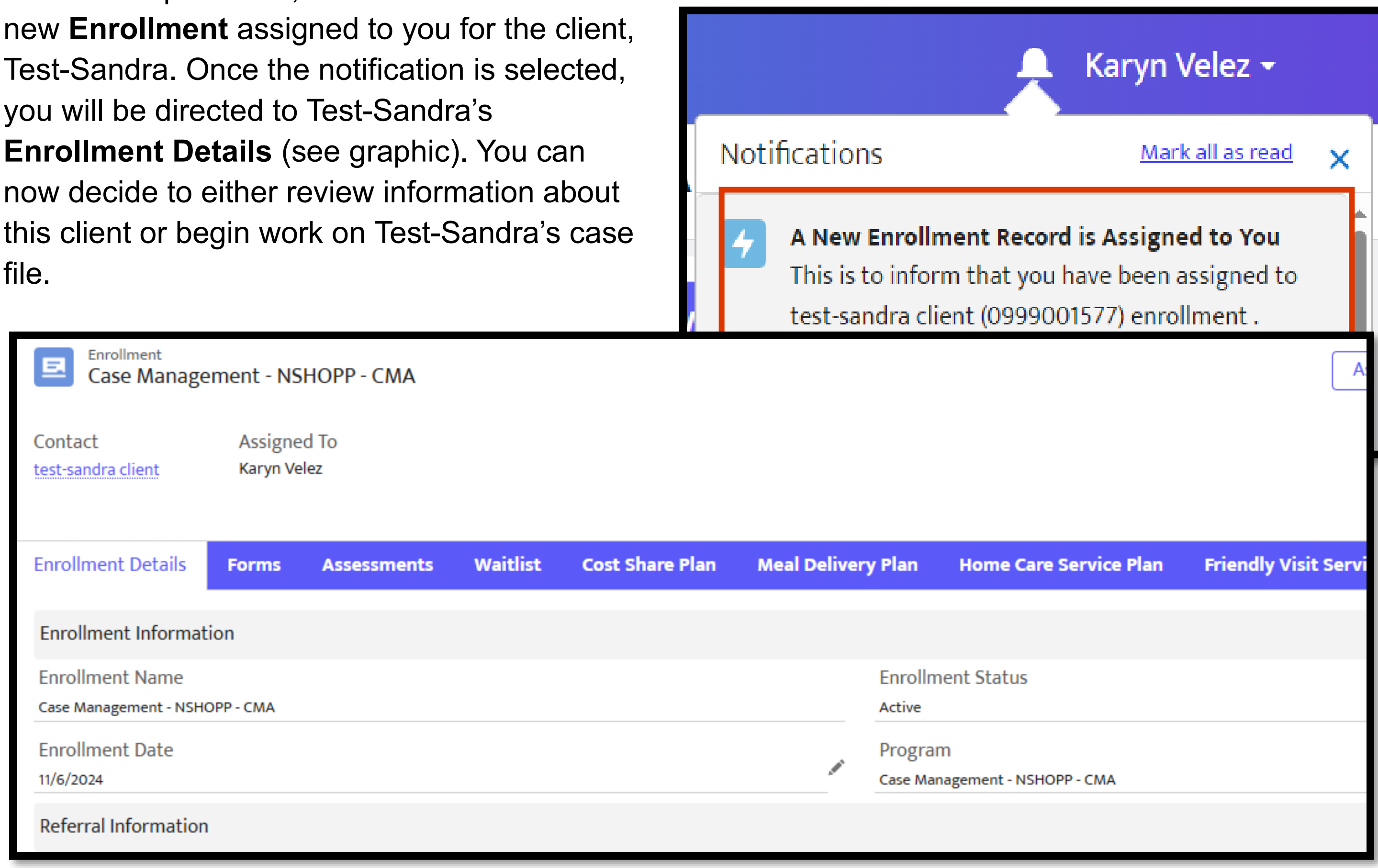


To view and access **Notifications**:

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

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

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

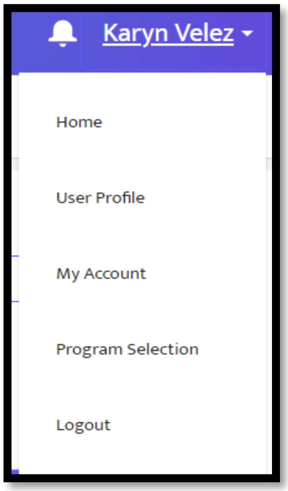


Notifications are ordered so that the most recent one appears at the top of the list. If you want to view others, scroll down.

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

User Name Profile

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



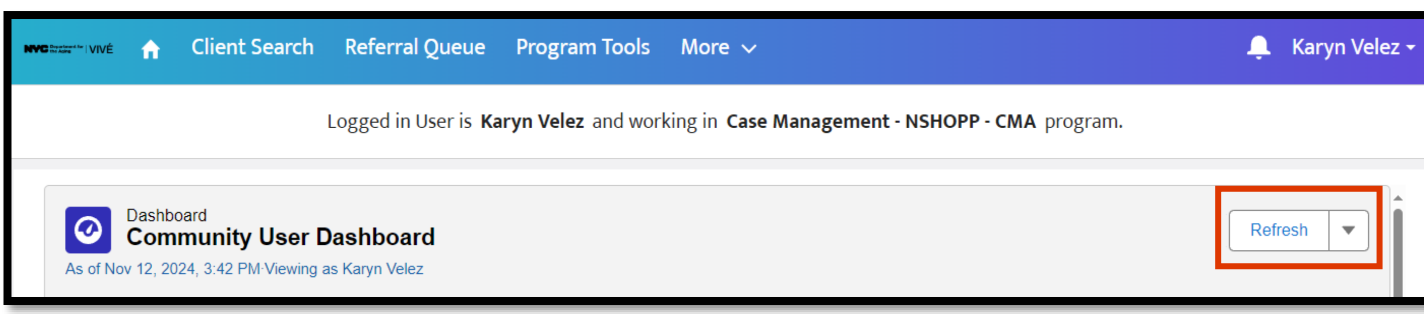
- Home – This functionality is used to bring you back to the Dashboard from any screen page in VIVÉ.
- **User Profile** – This functionality provides access to information about you including your 1) title, 2) supervisor's name, 3) email address, 4) company name, telephone number and address and 5) mobile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

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

Refresh Button

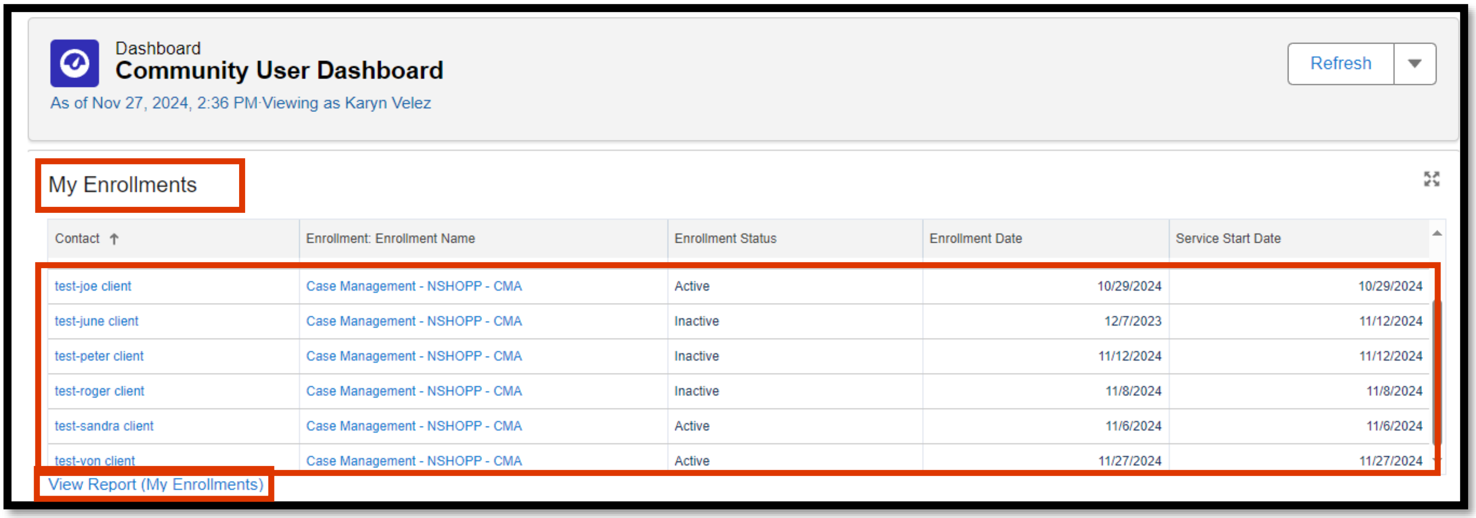
The **Refresh** button is used to "refresh" the various sections of the **Dashboard** page – **My Enrollments**, **My Follow-Ups** or **My Tasks**. Updates could include a listing of a newly assigned client or follow-up request. Also, the **Refresh** button will update any status changes with an enrolled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

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



My Enrollments

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

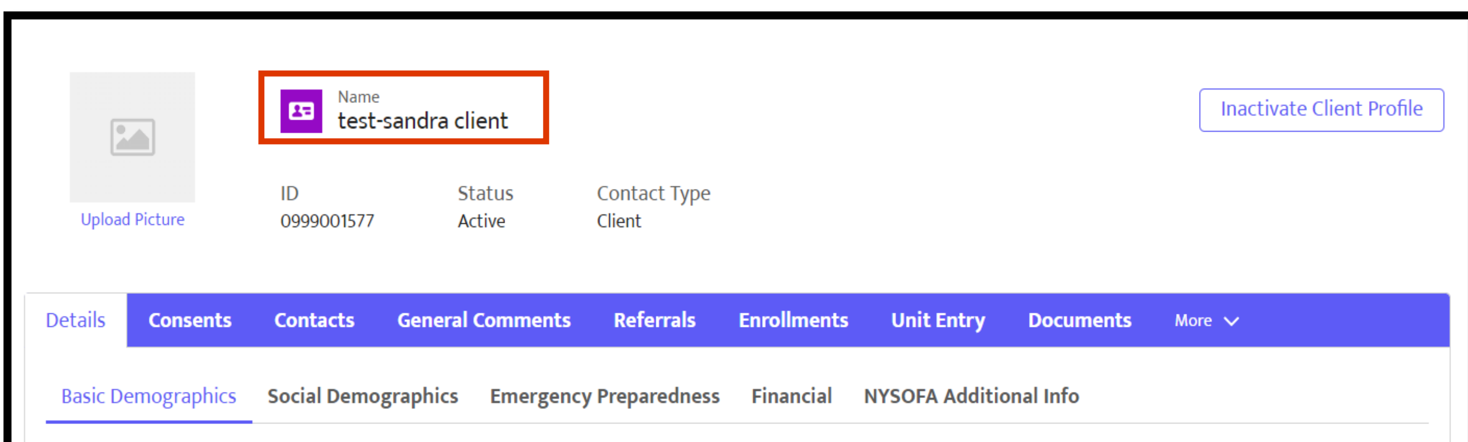


You can also review any reports associated with assigned clients on this portion of the page by clicking the hyperlink **View Report (My Enrollments)** at the bottom left. Finally, you can also access client files directly from **My Enrollments**.

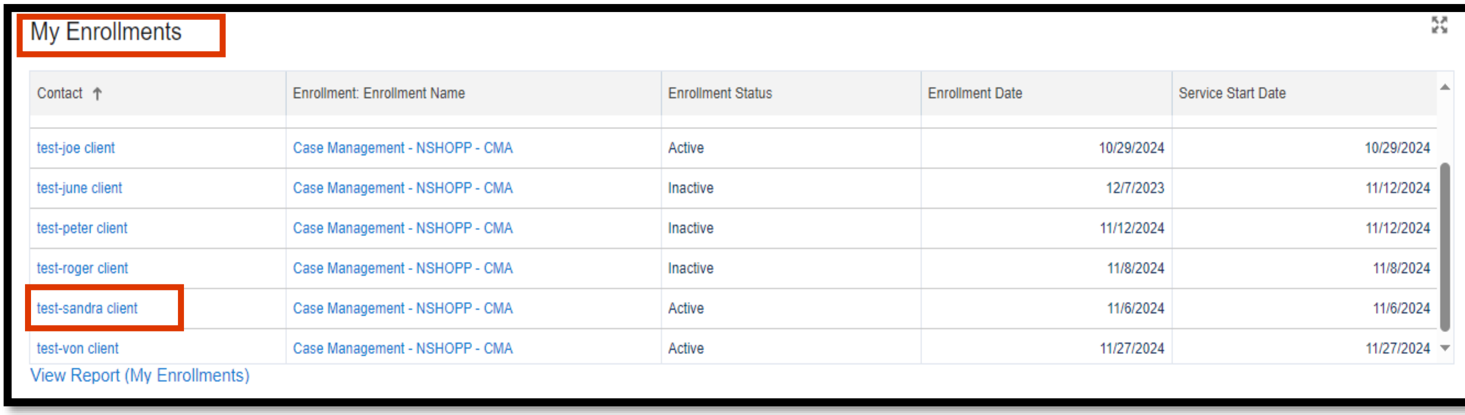
When accessing a client file from **My Enrollments**, you have the option to access information on the **Client Profile** level or the **Enrollment** level for your program type.

Accessing the Client Profile

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



[VIVÉ Knowledge Base – Dashboard]

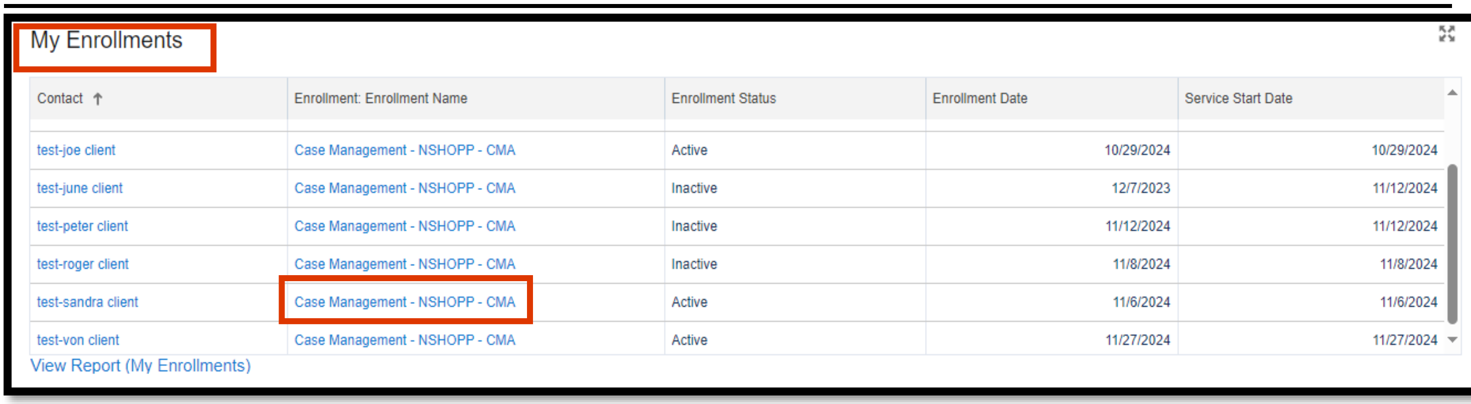


Accessing Enrollment Menu

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

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

My Follow-Ups



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

VIVÉ Knowledge Base – Dashboard

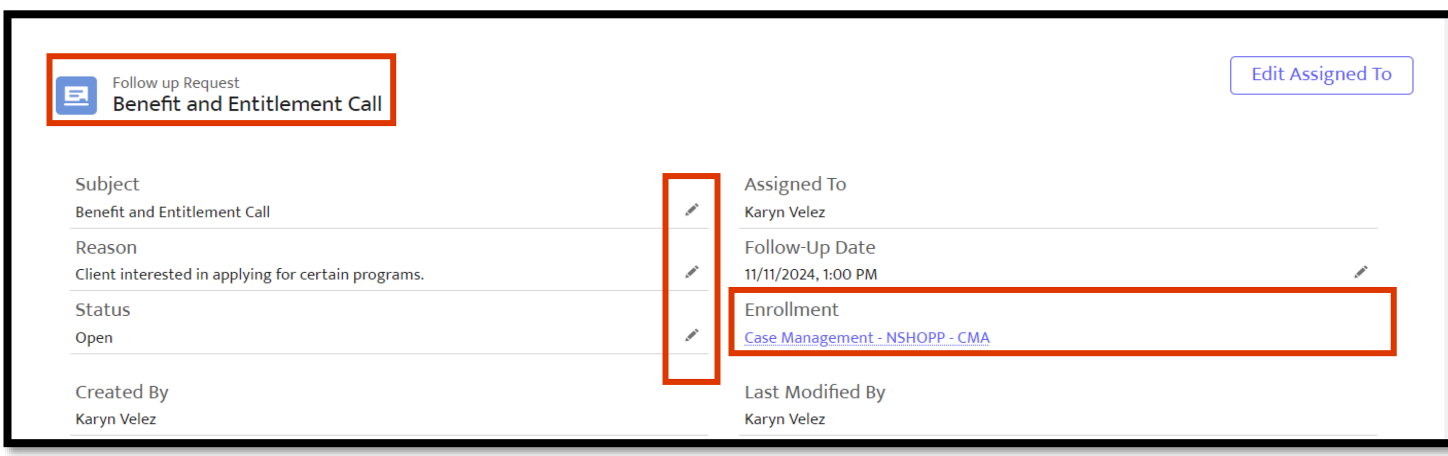
You can also review any records associated with assigned requests on this portion of the page by clicking the **View Report (My Follow-Ups)** link at the bottom left of this section.

Accessing the Follow-Up Request Screen

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

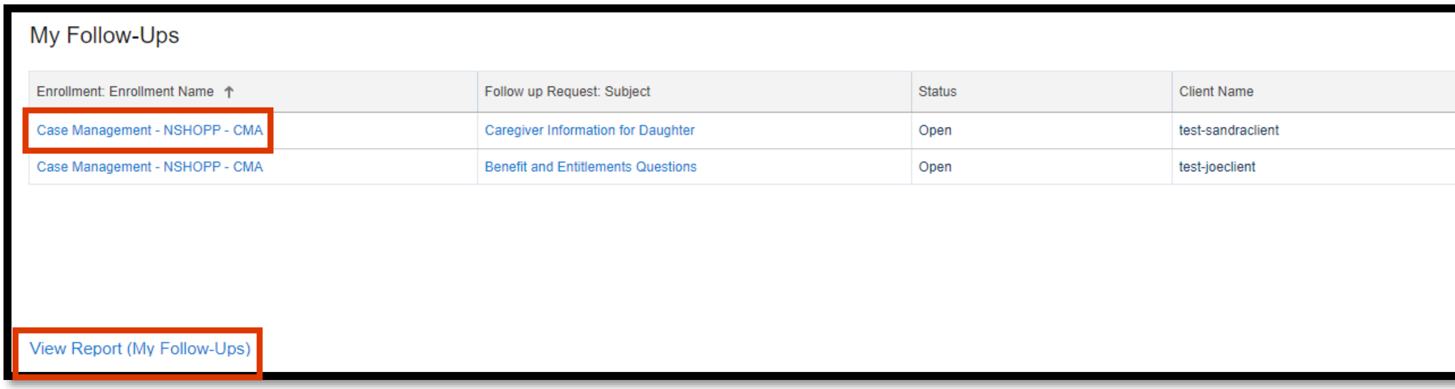
Once clicked, the **Follow-Up Request** screen will appear providing additional information, such as the reason for the request, the date and time the request is asked to be completed by and the person who created the request.

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



[*VIVÉ Knowledge Base – Dashboard*]

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

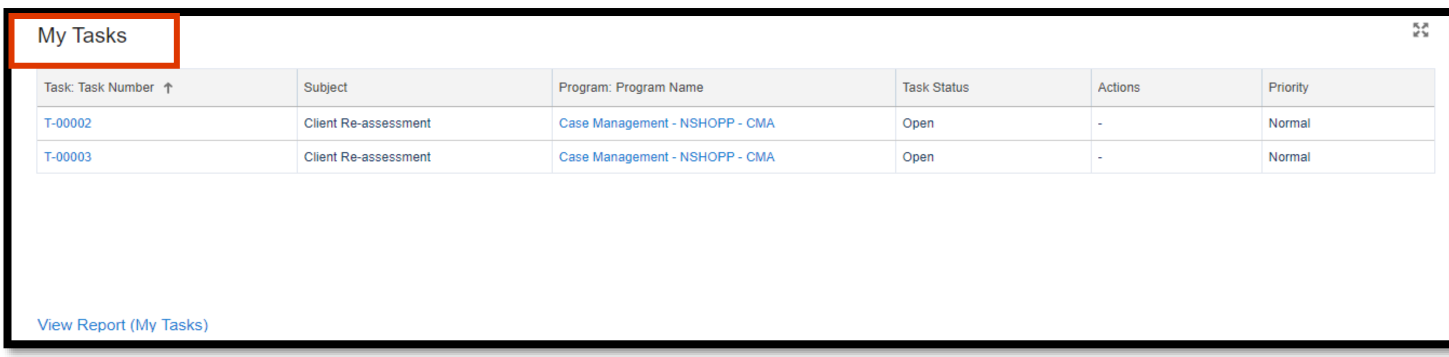

My Follow-Ups

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

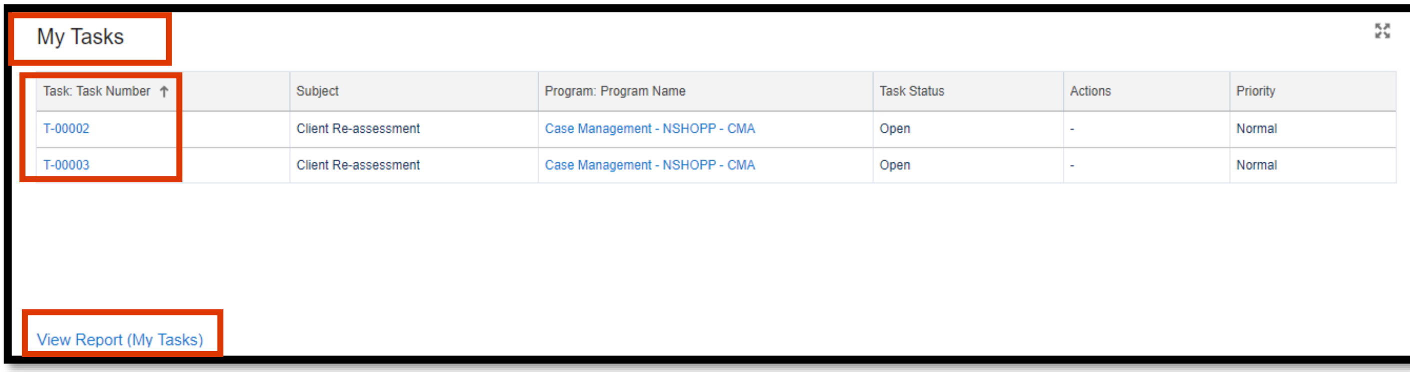
View Report (My Tasks)

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.

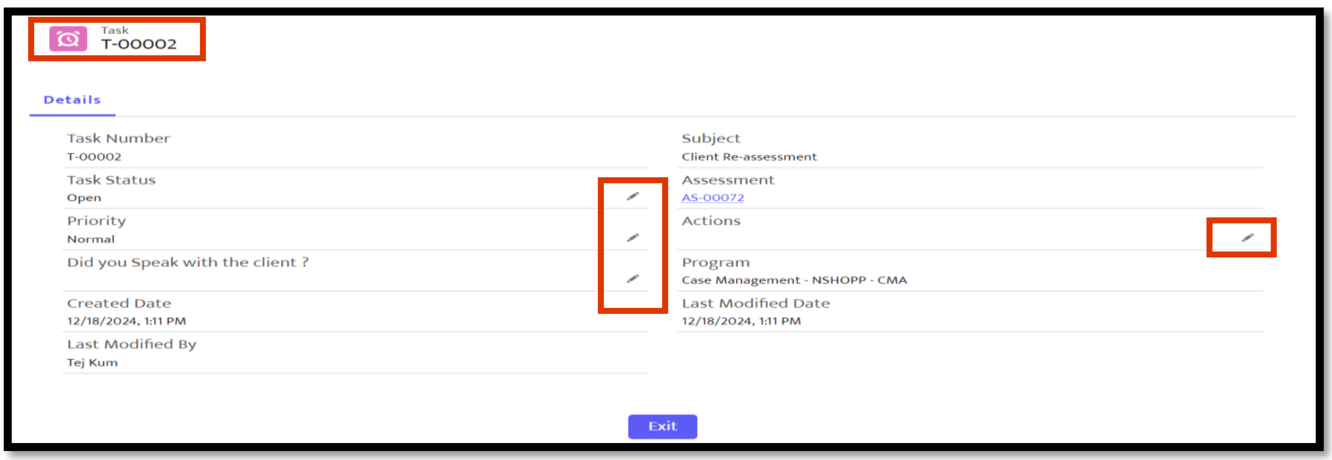
VIVÉ program users can also review a report on their **My Tasks** by clicking the link **View Report (My Tasks)** on the bottom left.

Accessing the Task Details

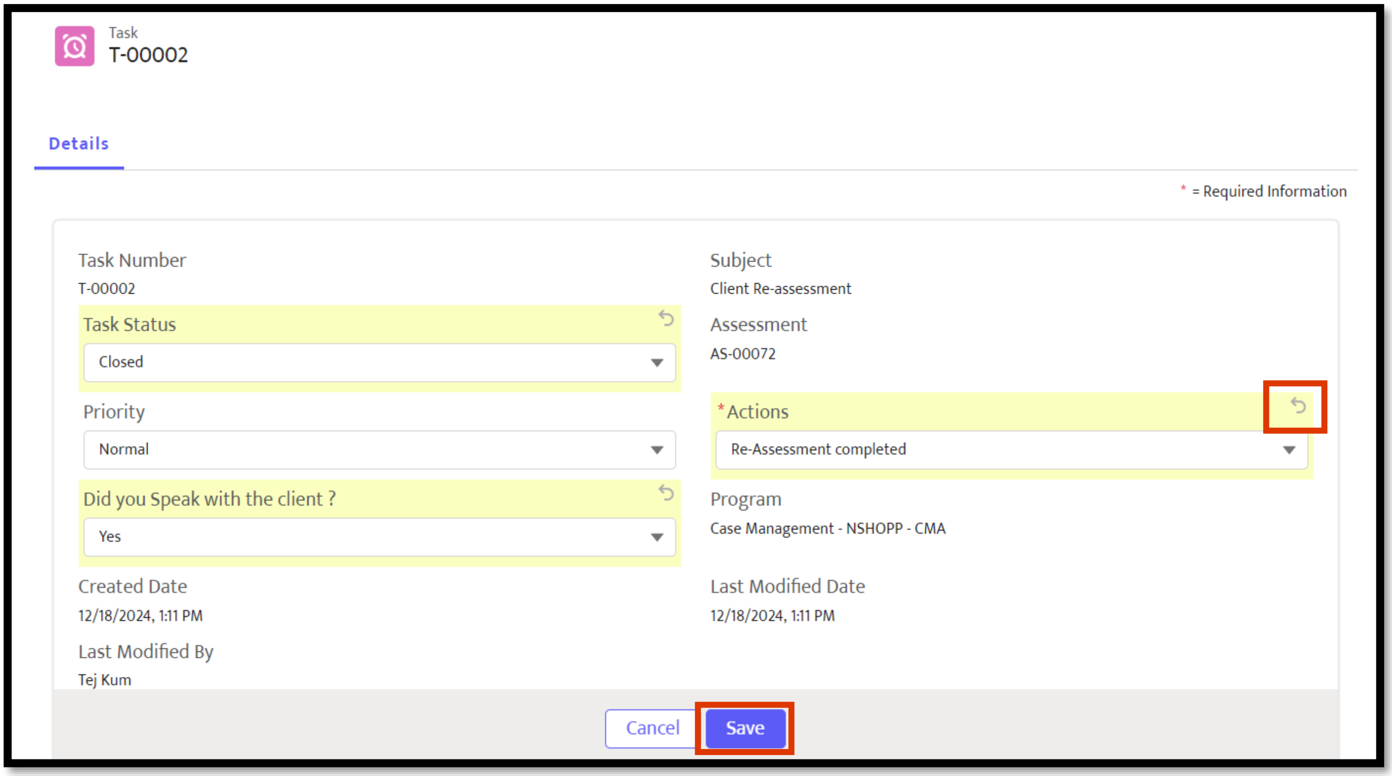
Step 1: From **My Tasks**, click the **Task: Task Number** link for the desired task. Once clicked, the **Task Details** screen will display related task information such as a hyperlink that directs you to the last Client Enrollment or **Assessment** created for the client. You will also be able to edit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



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



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



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

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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

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:

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

Overview of Documents

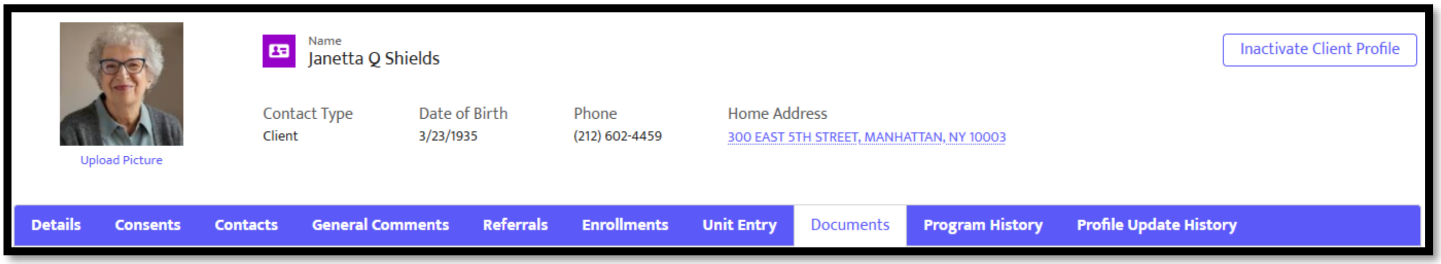
Documents featured in VIVÉ provides the ability for you to add, edit, and view a record of various document types associated with a client's file by uploading them into the database.

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

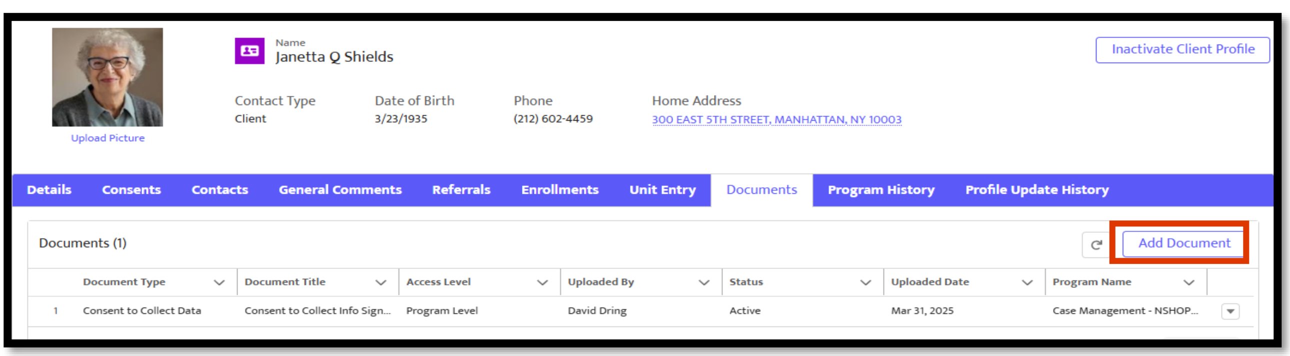
Adding Documents

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.)

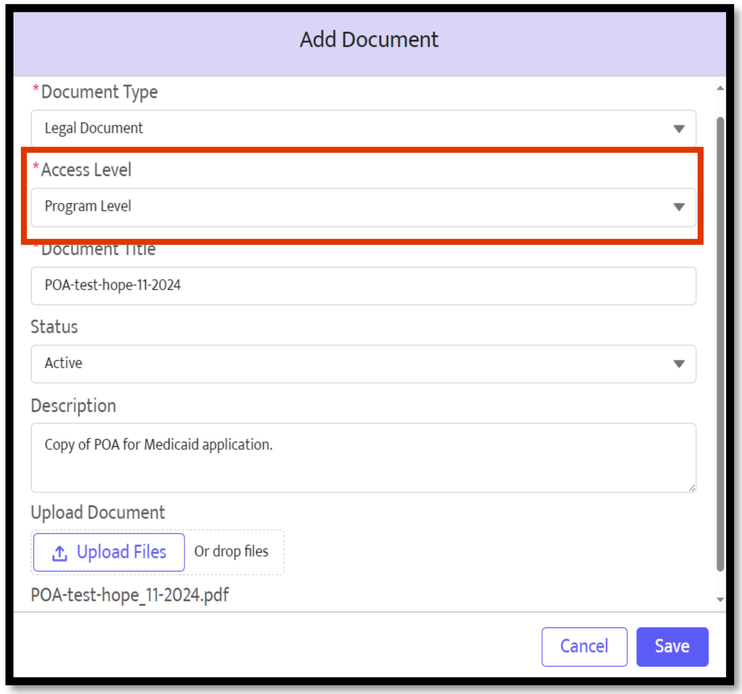
Step 1: From the **Top Menu**, click **Client Search**, click the client's name link.

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.



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.

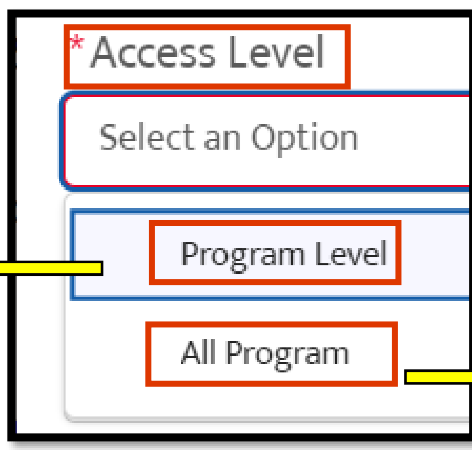


Access Level

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**.

Program Level access allows only staff within the program who added the Document to view or edit its status.

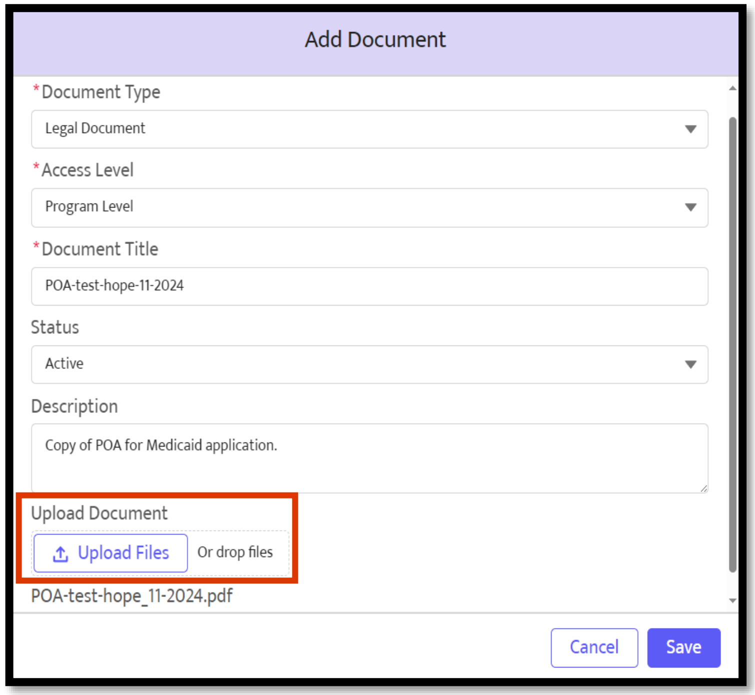


All Program access allows any contracted NYC-Aging program to view the uploaded Document or edit its status.

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.

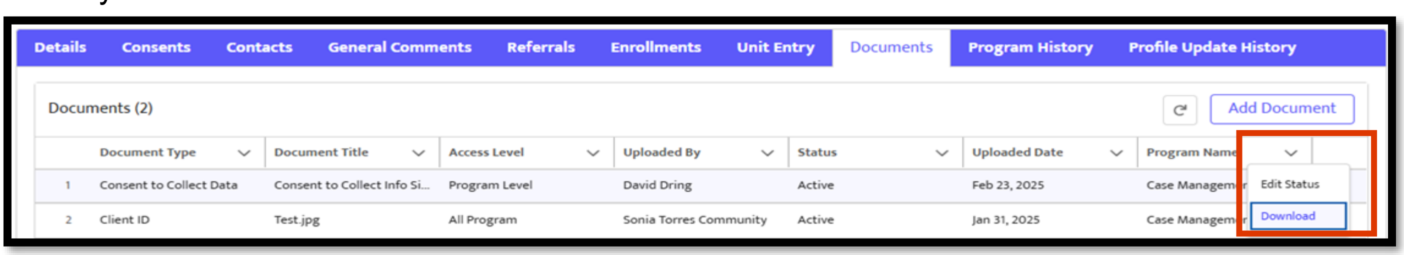
TIP: *Keeping various client documentation in one central location can be helpful when the need to access documents arises. Deciding to upload a client's documentation to the **Documents** feature on either the **Details** level or the **Enrollment** level, not both, may prove useful.*

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.

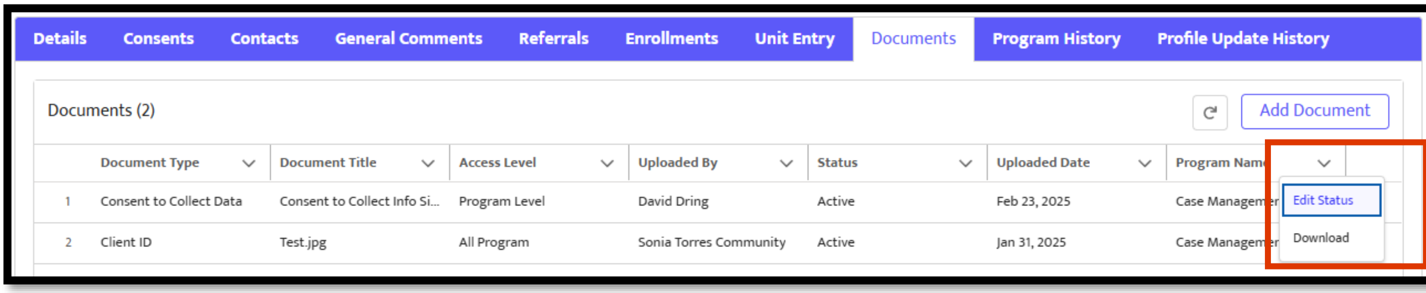


Edit Document Status

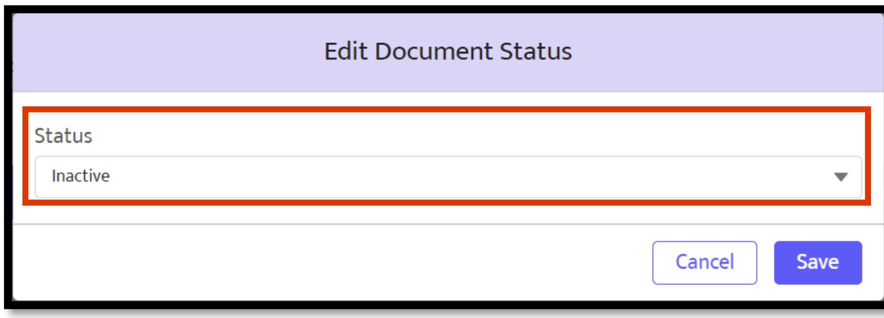
The same dropdown arrow feature provides the ability to edit the status of a document.

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.



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



Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

VIVÉ Admin Tools Reference Guide

VIVÉ is a customized client management system designed by NYC Aging. This system supports NYC Aging contractors in managing their client interactions and reporting on services provided. This reference guide provides instructions on creating, enrolling, disenrolling and the features of Admin Tools.

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

You may have accessed this guide from the VIVÉ Knowledge Base or from a program specific reference guide. At the beginning and end of this document is a link to return to the VIVÉ Knowledge Base. You can also use your browser's back button to return to the program reference guide.

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

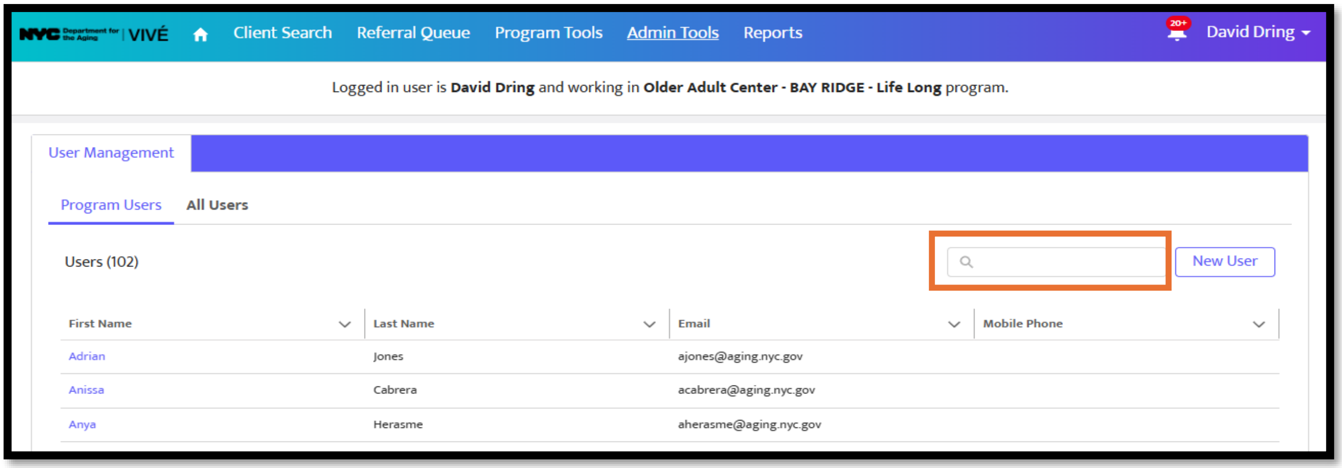
In this guide you will learn:

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.

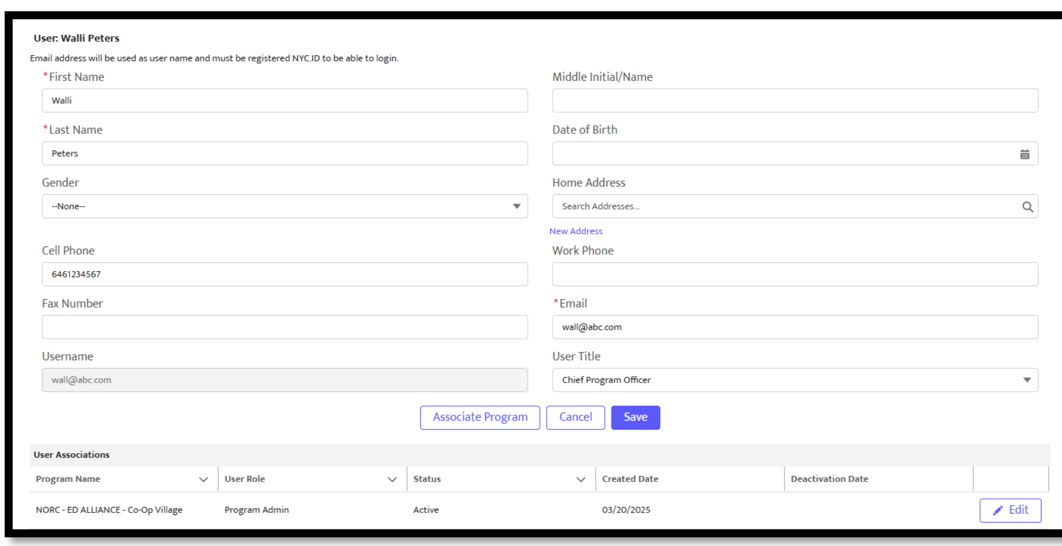


Viewing Users

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.



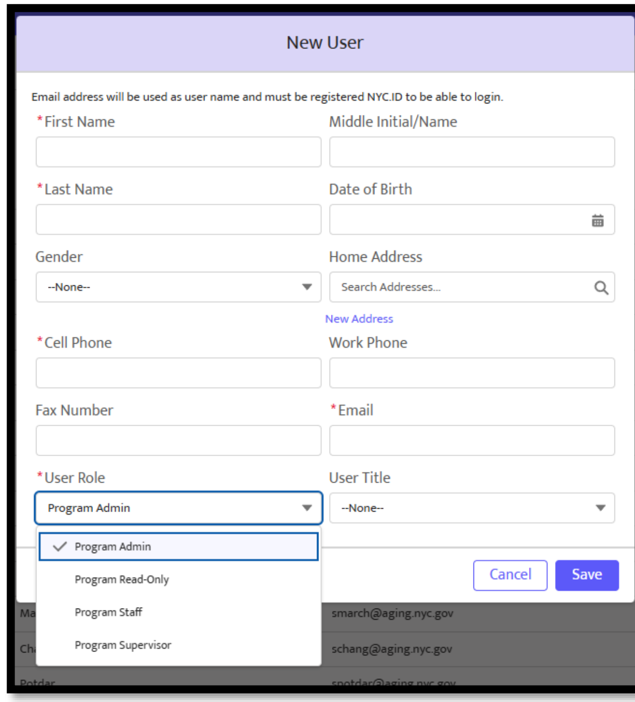
Creating a New User

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

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

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

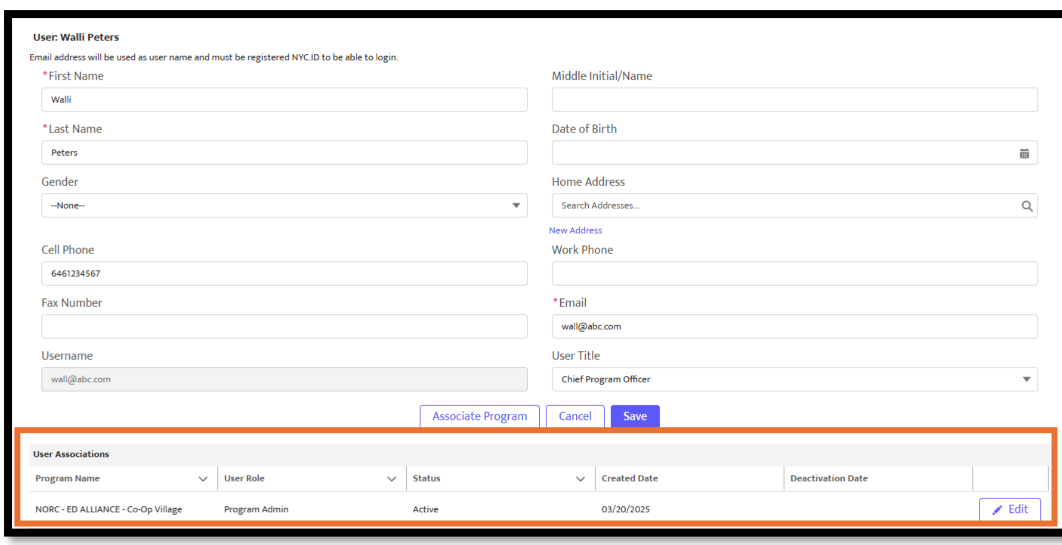
***NOTE**: The Email Address must be the same one associated with their NYC.ID.*



There are four User Roles:

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

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



Editing a User

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

Editing Basic Information

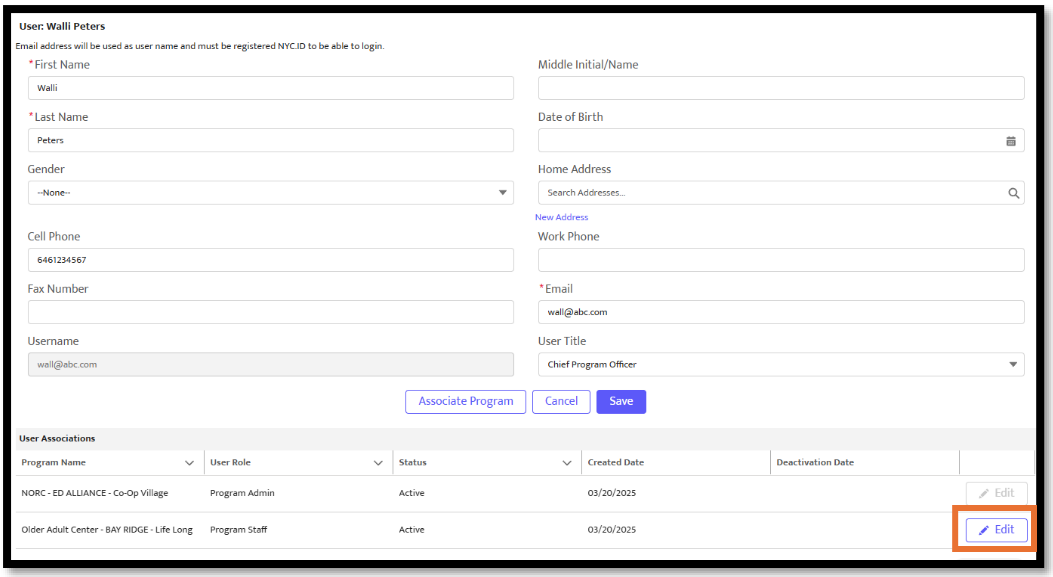
Step 1: From the Top Menu, click on Admin Tools.

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

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

Editing User Roles with Program Associations

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

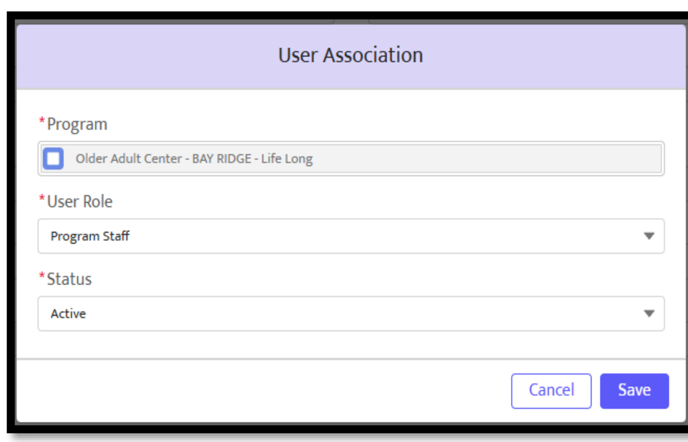


Step 1: From the Top Menu, click on Admin Tools.

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

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

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



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

Inactivating a User from a Program Association

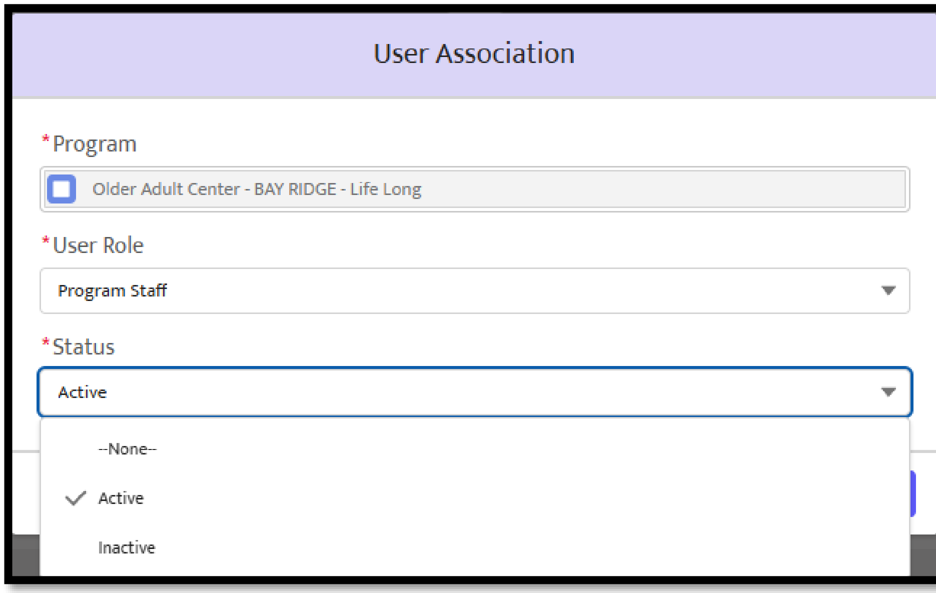
While users are never deleted from the system, they are inactivated from a program. In this way, they can be reactivated with another program later.

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

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

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

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



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.**