

[Return to VIVÉ Knowledge Base](#)

## The VIVÉ Friendly Visiting Programs Reference Guide

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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 **Friendly Visiting** module of VIVÉ. Follow the links below to access sections of this document or external references.

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

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

In this guide you will learn how to:

- **VIVÉ: Flow Diagrams**
- **New Client Flow Chart**
- **Referral Queue**
  - Reviewing a New Client Referral for Acceptance or Rejection
    - Adding a New Referral Note:
- **Enrollment**
  - To Assign Worker:
  - To Close Enrollment:
- **Case Notes: Viewing a CMA Note & Creating an FV Note**
  - Viewing a CMA Case Note
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- **Assessments & Forms**
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  - Ignore Cloning an Assessment
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- **Friendly Visiting Volunteer Information**
  - Adding a New Volunteer
  - Adding Volunteer Availability
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  - Volunteer Documents

- Adding Volunteer Notes
- **Match Status**
  - Creating Match – Client Process
  - Creating a Match – Volunteer Process
- **Finalizing Friendly Visit Service Plan**
  - Updating the Friendly Visit Service Plan
  - Closing the Friendly Visit Service Plan
    - Dissolving Match Status
    - Closing the Service Plan
- **Friendly Visiting Volunteer Units of Service**
  - Adding a New FV – Units of Service Record
  - Editing an Existing FV – Units of Service Record
  - Finalizing Existing FV – Units of Service Record
- **Access Assistance with VIVÉ and the VIVÉ Knowledge Base**

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

- |   |                               |                                 |
|---|-------------------------------|---------------------------------|
| ● <a href="#">Basic Navigation</a>            | ● <a href="#">Contacts</a>    | ● <a href="#">Glossary</a>      |
| ● <a href="#">Case Notes</a>                  | ● <a href="#">Dashboard</a>   | ● <a href="#">Notifications</a> |
| ● <a href="#">Client Profile</a>              | ● <a href="#">Documents</a>   | ● <a href="#">NYC.ID Login</a>  |
| ● <a href="#">Client Search &amp; Initial</a> | ● <a href="#">Enrollments</a> | ● <a href="#">Referrals</a>     |
| ● <a href="#">Data Entry</a>                  | ● <a href="#">Events</a>      | ● <a href="#">Reports</a>       |
| ● <a href="#">Consent</a>                     | ● <a href="#">Follow-Up</a>   | ● <a href="#">Unit Entry</a>    |

## VIVÉ: Flow Diagrams

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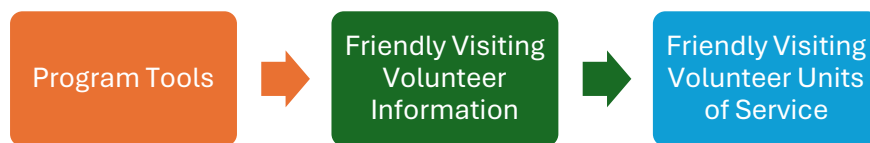
The following flow diagrams illustrate the navigation processes for key aspects of your work. These diagrams provide a general overview of the steps involved in completing key tasks, while also showcasing the various sections of the VIVÉ database. Detailed instructions on how to enter information will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

The following are flow diagrams for the steps that happen when entering information for a new client and new volunteer. You can navigate through these steps in this way and once information is entered, you can return to previous sections as needed.

### New Client Flow Chart



### New Volunteer Flow Chart



## New Client Flow Chart

When entering a new client in VIVÉ, the process follows the basic flow that is represented in the **New Client Flow Chart** diagram below. We will begin the discussion of this process with **Referral Queue**.



## Referral Queue

The **Referral Queue** is the starting point in evaluating the new client for enrollment into your **Friendly Visiting** program. **Referral Queue** is one of the links found on the **Top Menu**.



Your program is alerted to a new Friendly Visiting referral with an email that is sent from NYC Aging VIVÉ on behalf of the program you are associated with.

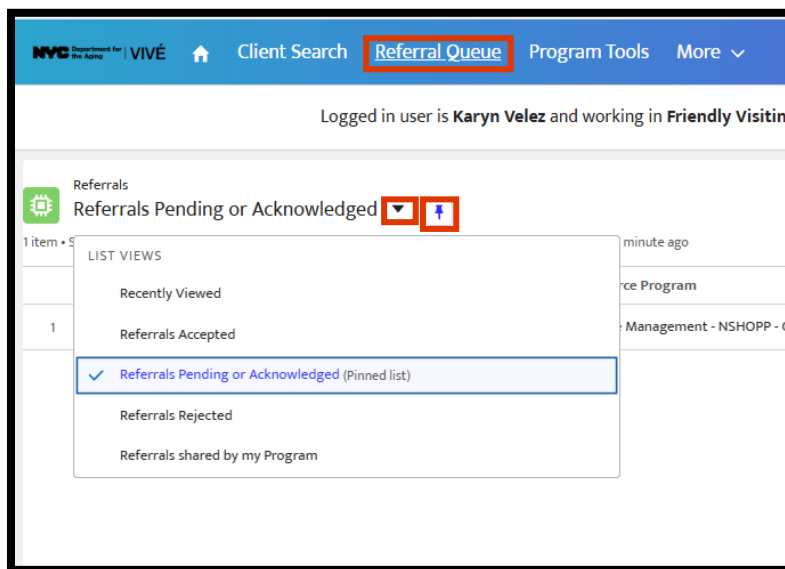


## Reviewing a New Client Referral for Acceptance or Rejection

**Step 1:** Click the **Referral Queue** link. The **Referrals** List View appears. Using the dropdown arrow, you can access five different referral types. You can select one of these as your default **Referrals** type using the pin icon.

The **Referral Filter** types are:

- **Recently Viewed:** Referrals recently opened and reviewed.
- **Referrals Accepted:** Referrals deemed appropriate and accepted.
- **Referrals Pending or Acknowledged:** Referrals received but no action has been taken.
- **Referrals Rejected:** Referrals deemed not appropriate for services.
- **Referrals shared by my Program:** Referrals made by your program to other programs including termination of services and updates.



**Step 2:** To view pending referrals, pick **Referrals Pending or Acknowledged**. You can sort the list by clicking on the column headings. For example, click the arrow next to **Referral Name** to sort the list in either ascending or descending order.

Logged in user is Karyn Velez and working in Friendly Visiting - NSHOPP - CMA program.

Referrals						
Referrals Pending or Acknowledged						
6 Items • Sorted by Referral Name • Filtered by All referrals - Referral Status, Referral Received • Updated a few seconds ago						
	Referral Name	Referral Status	Referral Date	Source Program	Contact	Last Modified By
1	RF-84514	Referral Sent	3/22/2025	Case Management - NSHOPP - CMA	test-joe client	Karyn Velez
2	RF-84517	Referral Sent	3/23/2025	Case Management - NSHOPP - CMA	jimmy Durante	Karyn Velez
3	RF-84518	Referral Sent	3/23/2025	Case Management - NSHOPP - CMA	test-avis client	Karyn Velez
4	RF-84519	Referral Sent	3/23/2025	Case Management - NSHOPP - CMA	Alfred client	Karyn Velez
5	RF-84520	Referral Sent	3/23/2025	Case Management - NSHOPP - CMA	Peter Lorre	Karyn Velez
6	RF-84521	Referral Sent	3/23/2025	Case Management - NSHOPP - CMA	test-bradley client	Karyn Velez

**Step 3:** Click on a **Referral Name** link to access that **Referrals Details** page. The form provides details about the referral and a link to view the **Friendly Visit Service Plan**. Aside from the **Exit** button, located at the bottom of the form, there are three additional buttons on the referral – **Acknowledge**, **Accept** or **Reject** – located at the top-right of the form.

Select the **Acknowledge** button to let the referring program know the referral was received. They see the update on their **Referrals shared by my Program** List View.

**Step 4:** On the **Referrals Details** page under the Friendly Visiting Service Plan, click on the link to view a read-only page of the **Friendly Visiting Service Plan**.

Referral RF-84519

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

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

**Referral Information**

Referral Name: RF-84519

Referral Date: 3/23/2025

Source Program: Case Management - NSHOPP - CMA

Referral Status: Referral Sent

Contact: [Alfred client](#)

Target Program: Friendly Visiting - NSHOPP - CMA

External Agency Name:

Is for external agency? ☐

Referral Comments: Mr. Alfred is excited about meeting someone new and being a part of your program.

**Service Plan**

[Friendly Visit Service Plan FV-00126](#)

**Services Requested**

Outreach

**System Information**

Created By: Karyn Velez

Last Modified By: Karyn Velez

**Step 5:** From the **Referral Details** page, you can also **Accept** or **Reject** the referral. If you select **Accept**, the system confirms the referral has been accepted by your program. The **Accept** and **Reject** buttons are replaced with a **Create Enrollment** button on the **Referral Details** form.

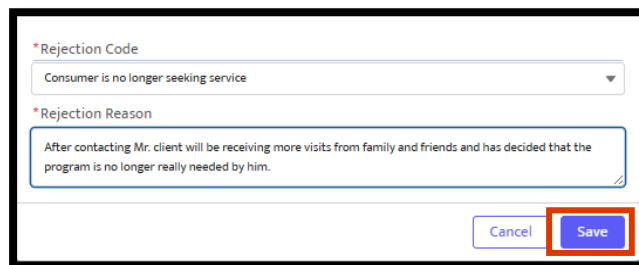
Referral RF-84519

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

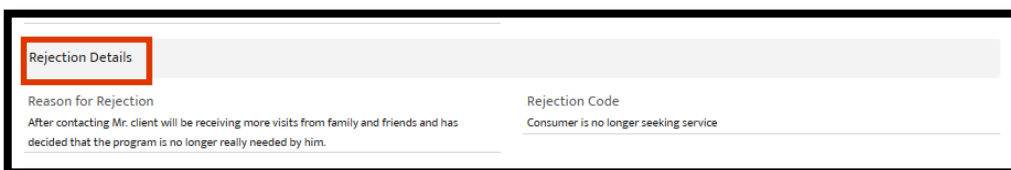
[Create Enrollment](#)

The referral moves from the list **Referrals Pending or Acknowledged** to **Referrals Accepted** on the queue. The referring program is updated to this acceptance on their **Referral Queue** listing.

If you select **Reject**, a pop-up window displays requests for **Rejection Code** and **Reason**. Confirm all required fields are completed before selecting **Save**.

A screenshot of a web form for rejecting a referral. It has two main sections: 'Rejection Code' with a dropdown menu showing 'Consumer is no longer seeking service', and 'Rejection Reason' with a text area containing the text 'After contacting Mr. client will be receiving more visits from family and friends and has decided that the program is no longer really needed by him.' At the bottom right are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

You return to **Referral Details** where the **Accept** and **Reject** buttons are no longer displayed and no fields are editable. The **Rejection Details** display in the middle of the form. Selecting **Exit** returns you to the **Referrals** list view.

A screenshot of the 'Referral Details' form. A tab labeled 'Rejection Details' is highlighted with a red box. Below the tab, there are two columns of information. The left column is titled 'Reason for Rejection' and contains the text 'After contacting Mr. client will be receiving more visits from family and friends and has decided that the program is no longer really needed by him.' The right column is titled 'Rejection Code' and contains the text 'Consumer is no longer seeking service'.

VIVÉ automatically updates the **Referrals shared by my Program** List View of the program that made the initial service request.

**NOTE:** In VIVÉ reviewing CMA notes can only be done after the referral has been accepted and an **Enrollment** has been created for the client. If the client is deemed ineligible for services after reviewing the CMA notes, then the status of the Friendly Visiting Service plan would have to be terminated. (see notes under **Finalizing Friendly Visit Service Plan** and **Closing The Friendly Visit Service Plan**).

Only Referrals without an attached Friendly Visit Service Plan are **Rejected** prior to Enrollment.

## Referral Notes

There is an option to add notes to a referral using the **Notes** link on the **Referral Details** page.

**Step 1:** Click the sub-menu link: **Notes**.

The **Notes** List View provides the ability to add, print, and find specific notes, by date, using the **Filter** button.

The screenshot shows the 'Referral Details' page with the 'Notes' sub-menu highlighted in a red box. Below the sub-menu, there are 'From' and 'To' date pickers, a 'Filter' button, and a 'Notes (1)' section. The 'Notes (1)' section contains a table with columns: Event Date, Subject, Comments, Created By, Last Modified By, and Program Name. A single note is listed with the date 03/24/2025, subject 'Referral Acknowledged', and comment 'In process of reviewing re...'. The note is created by 'Karyn Velez' and last modified by 'Karyn Velez'. The program name is 'Friendly Visiting - NSHOP...'. An 'Edit' button is visible at the end of the note row. At the top right of the 'Notes (1)' section, there are 'New Note' and 'Print Notes' buttons, with 'New Note' highlighted in a red box. At the bottom, there are pagination controls showing 'Showing 1 of 1 Page(s)' and 'Total Records: 1'.

## Adding a New Referral Note:

Select the **New Note** button.

The **New Referral Note** pop-up appears. Enter information and select **Save**.

You return to the List View where information about the note is displayed. An **Edit** button is available to the far-right of the note row.

The screenshot shows the 'New Referral Note' pop-up form. It has a 'Title' field with the text 'Referral Acknowledged' and a 'Comments' field with the text 'In process of reviewing referral for acceptance or rejection'. At the bottom right, there are 'Cancel' and 'Save' buttons, with 'Save' highlighted in a red box. A character count '61 / 10000 characters' is visible next to the comments field.

## Editing a Referral Note

Select **Edit** at the right end of the note row on the **Notes** List View.

The screenshot shows the 'Referral Details' page with the 'Notes' sub-menu highlighted in a red box. Below the sub-menu, there are 'From' and 'To' date pickers, a 'Filter' button, and a 'Notes (1)' section. The 'Notes (1)' section contains a table with columns: Event Date, Subject, Comments, Created By, Last Modified By, and Program Name. A single note is listed with the date 03/24/2025, subject 'Referral Acknowledged', and comment 'In process of reviewing re...'. The note is created by 'Karyn Velez' and last modified by 'Karyn Velez'. The program name is 'Friendly Visiting - NSHOP...'. An 'Edit' button is visible at the end of the note row, highlighted in a red box. At the top right of the 'Notes (1)' section, there are 'New Note' and 'Print Notes' buttons. At the bottom, there are pagination controls showing 'Showing 1 of 1 Page(s)' and 'Total Records: 1'.

The **Edit Referral Note** pop-up appears. Make any necessary changes and select **Save**.

The edited item reflects on the List View.

**Edit Referral Note**

Title  
Referral Acknowledged

Comments  
In process of reviewing referral for acceptance or rejection. To review by Friday.

82 / 10000 characters

Cancel Save

## Enrollment

**Enrollment** is the process of moving the client into your program so further actions can be taken in their record. This process also enables the assignment of a worker to a client's case.

### Enrollment of a New Client

**Step 1:** After a client is accepted on the **Referral Details** page, select the **Create Enrollment** button.

Referral RF-84519

Create Enrollment

Referral Details Notes

**Step 2:** From the **Create Enrollment** pop-up enter the Enrollment date, which can be in the past, but never in the future. The other fields will be pre-populated. Once the date is confirmed, select **Save**.

**Create Enrollment**

\* Program  
Friendly Visiting - NSHOPP - CMA

\* Contact  
Alfred client

\* Enrollment Date  
Mar 23, 2025

Cancel Save

**Step 3:** After selecting **Save**, the Enrollment Details Menu appears. This page includes tabs to access various forms, complete assessments, match clients to volunteers and more. The default tab is **Enrollment Details**, which provides an overview of the client's enrollment and referral information. The status for the enrollment is listed as **Active**. Also available are two buttons – **Assign Worker** and **Closing Enrollment**.

Enrollment Friendly Visiting - NSHOPP - CMA

Assign Worker Closing Enrollment

Contact Assigned To  
Alfred client

Enrollment Details Forms Assessments Match Status Friendly Visit Service Plan Case Notes Follow up More

Enrollment Information

Enrollment Name Enrollment Status  
Friendly Visiting - NSHOPP - CMA Active

Contacts Documents Status History



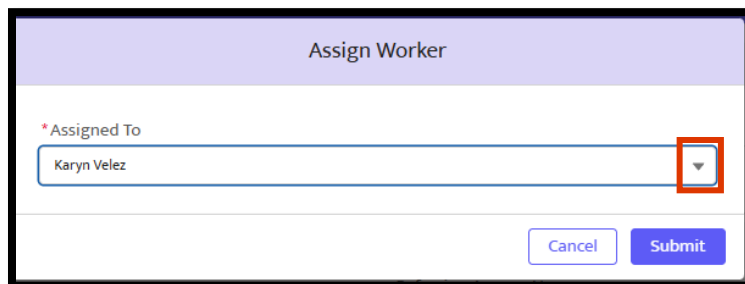
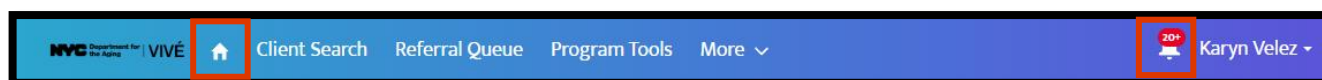
## To Assign Worker:

**Step 1:** From the **Enrollment Details Menu** in the upper right-hand corner, select **Assign Worker**. In the pop-up, use the dropdown menu to pick a team member to assign to this client.

The assigned worker receives a **Notification** that this client has been added to their caseload and has two options to view the notification.

**Option 1:** Select the **Bell Icon** on the **Top Menu** to view the message.

**Option 2:** View the assigned client within the **My Enrollments** on the **Dashboard**. Be sure to **Refresh** the **Dashboard** page to view client information.

A screenshot of the 'Assign Worker' pop-up form. It has a light purple header with the title 'Assign Worker'. Below the header is a text input field labeled '\* Assigned To' containing the name 'Karyn Velez'. To the right of the input field is a dropdown arrow icon, which is highlighted with a red square. At the bottom right of the form are two buttons: 'Cancel' and 'Submit'.

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

## Ignore Close Enrollment:

Friendly Visiting programs can ignore this **Closing Enrollment** button on the Enrollment Details page. This common button is used by only certain programs. A client's enrollment will automatically be inactivated once the **Friendly Visit Service Plan** is **Terminated**.



You can view this change to the Enrollment status on the **Enrollment Details** page where a notation on the inactivation of the enrollment will be displayed.

In the middle of the Enrollment Details page, details of the enrollment closing are available.

The updated status of Inactive is also displayed within My Enrollments on the Dashboard.

Contact	Enrollment: Enrollment Name	Enrollment Status	Enrollment Date	Service Start Date
Alfred client	Friendly Visiting - NSHOPP - CMA	Active	3/23/2025	-
Alistar Cook	Friendly Visiting - NSHOPP - CMA	Inactive	3/23/2025	-

## Case Notes: Viewing a CMA Note & Creating an FV Note

### Viewing a CMA Case Note

Case notes that have been shared by the case management agency can be viewed in read-only status using the Case Notes tab. There are three ways to access the **Case Notes** tab after accepting and enrolling the client:

- From the **Enrollment Details Menu**, click the **Case Notes** tab.
- Using **Client Search** find your client. From the **Details Menu** click on the **Enrollment** tab, then click on the **Case Notes** tab.
- From the **Referral Queue**, pick the **Referrals Accepted** List View and select the client's **Referral Name** link. On the **Referral Details** form, select the **Go to Enrollment** button then click the **Case Notes** tab.

**Step 1:** From the **Enrollment Details Menu**, click on the **Case Notes** tab. Notes can be filtered by date using the date fields and **Filter** button. Notes are grouped by program type, under **Program Name** column, with the notes associated with the viewing program listed first and notes from the shared program listed after. Click on the **Subject** link to view the **Case Note Details** form.

**Step 2:** The read-only form (the record cannot be edited), displays pertinent information including the case note entry in the **Notes** field. Select **Exit** to return to the **Case Notes** tab.

## Creating a New Friendly Visiting Case Note

**Step 1:** From the **Enrollment Details Menu**, click the **Case Notes** tab.

**Step 2:** On the Case Notes tab, select the **New Case Note** button.

**Step 3:** On the **New Case Note** pop-up, complete all required fields. The **Service Date** can be backdated but not set in the future. The **Status** field defaults to **Draft**. Use the dropdown to change status if needed.

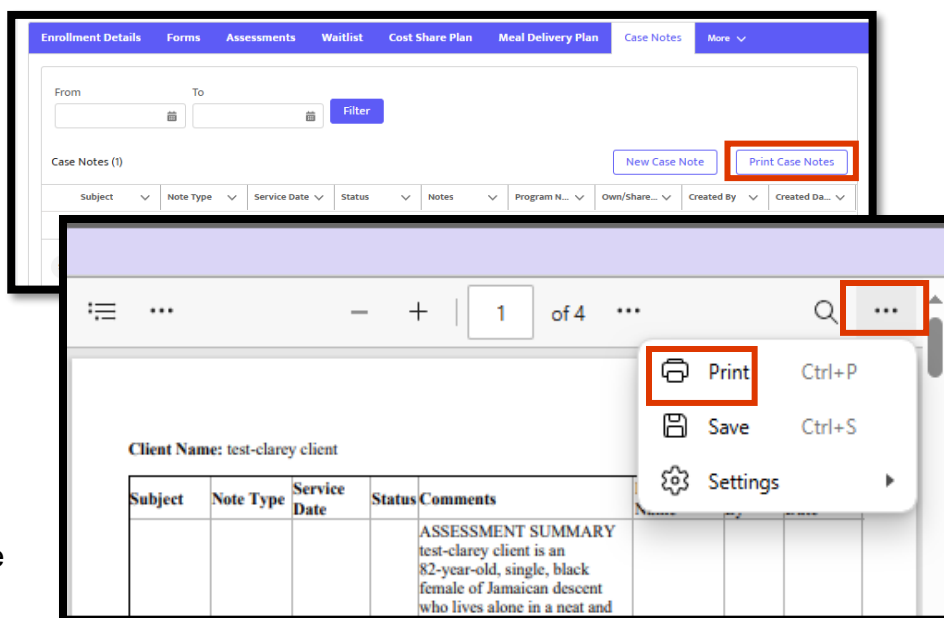
If you want this case note to be shared with the client's case management program, be sure to select the **Share with Other Programs** checkbox before selecting **Submit**.

When you return to the **Case Notes** tab, the note will be in **Draft** status with your Program in the Program Name column. Notes remain in draft status until they are finalized.

## Printing Case Notes

Notes can be printed by selecting **Print Notes** button and following the prompts for printing.

**Step 1:** Select **Print Case Notes** on the **Case Notes** List View. A pop-up will display 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.

**TIP:** Selecting the **Print Case Notes** button can also be used to view all the client's case notes at the same time. This feature may help streamline the process of reviewing case notes.

Options such as Highlighting, Fit to Page, and Zoom in/Zoom out are also available on the Print menu bar.

## Editing a Friendly Visiting Case Note

**Step 1:** From the Enrollment Details menu, click the Case Notes tab.

**Step 2:** Click on the Subject link name to access the Case Notes Details page.

**Step 3:** Click on any pencil icon, make your edits to the **Service Date**, **Subject**, **Notes**, or **Status**. **Step 2:** The form displays pertinent information including the case note entry in the **Notes** field. To view entries that any of the pencil icons to open **Notes** fields. Then use the up/down arrows to scroll through the note. Select **Exit** to return to the **Case Notes** tab.

**Step 4:** Select **Save**, then select **Exit**.

The screenshot shows the 'Case Notes Details' form. The 'Details' tab is active. The form contains the following fields: 'Service Date' with a date picker set to 3/24/2025; 'Status' as a dropdown menu set to 'Draft'; '\*Subject' as a text field containing 'Initial Assessment Phone Call'; 'Program Name' as 'Friendly Visiting - NSHOPP - CMA'; and 'Notes' as a text area containing 'Completed the initial assessment on the telephone. Also completed the loneliness and social isolation assessment.'. At the bottom, there are 'Created By' and 'Last Modified By' fields, both showing 'Karyn Velez'. At the very bottom are 'Cancel', 'Save', and 'Exit' buttons. The 'Save' button is highlighted with a red box.

**NOTE:** Case notes remain editable only when they are in **Draft** status. Once the status is changed to **Final**, the note can no longer be edited.

When the note's status is **Final** and you select **Save**, you will receive a Snag error message that states you don't have permission to modify the record. Select **Cancel** to return to the List View.

The screenshot shows the 'Case Notes' form with a red error message box overlaid. The message says 'We hit a snag.' and 'Review the errors on this page.' with a bullet point: 'You cannot edit this record because you do not have permission to modify records owned by other programs.' The 'Save' button is disabled (greyed out), and the 'Cancel' button is visible. The background form shows a note about 'Mr. Alfred' and the same user information as the previous screenshot.

## Assessments & Forms

There is only one form within the assessment section and one form on the Forms tab. These two forms are in two different styles: Page View and List View.

- **Page View** forms link directly to the questions. **FV Program Assessment** is Page View.
- **List View** forms provide a historical list of completed forms. The list often includes multiple completed forms. **Loneliness/Social Isolation (FV)** is List View.

## Creating a Friendly Visiting Program Assessment

**Step 1:** From the **Top Menu**, search for a client using either **Client Search** or **Referral Queue**. Click on the desired client's link. From the **Details** menu, click the **Enrollments** tab. Click **Enrollment Name** link.

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

**Step 3:** Select **Create Assessment** button.

The screenshot shows the 'Enrollment Details' page for 'Friendly Visiting - NSHOPP - CMA'. The 'Assessments' tab is active, displaying a table with 0 assessments. A 'Create Assessment' button is highlighted with a red box. The table has columns for Assessment ID, Assessment Type, Assessment Reason, Assessment Status, Assessment Start Date, Program Name, and Own/Shared Form.

**Step 4:** From the **Create Assessment** pop-up complete the required fields. The **Assessment Date** can be in the past but never in the future. Confirm that all required fields are entered before selecting **Save**.

The screenshot shows the 'Create Assessment' pop-up form. Required fields are filled: Assessment Type (Friendly Visiting Assessment), Assessment Reason (Initial), and Assessment Date (Mar 24, 2025). Contact (Peter Lorre) and Enrollment (Friendly Visiting - NSHOPP - CMA) are also selected. The 'Save' button is highlighted with a red box.

The **Assessment Details** form opens with general information about the assessment and an **Assessment Status** of **Pending**.

To update the page, click on any of the pencil icons to open editable fields and select **Save**.

You return to the **Assessments** List View by selecting **Exit** on the page.

The screenshot shows the 'Assessment Details' form with a table of information. The 'Assessment Status' field is highlighted with a red box and shows 'Pending' with a pencil icon. The 'Exit' button is at the bottom right.

Assessment Details	
Assessment ID	AS-19053
Assessment Reason	Initial
Assessment Start Date	3/24/2025
Reassessment Due Date	
Referring Agency Name	Case Management - NSHOPP - CMA
Created By	Karyn Velez
Assessment Type	Friendly Visiting Assessment
Assessment Status	Pending
Assessment Completed Date	
Linked Referral	RF-84520
Referring Worker Name	Karyn Velez
Last Modified By	Karyn Velez

**Step 5:** Select the **Forms** link to bring up the **Friendly Visiting Program Assessment** form. Select **Edit** to enter new data or update existing data.

The screenshot shows the 'FV Program Assessment' form. The 'Forms' link is highlighted with a red box. The 'Edit' button is highlighted with a red box. The form includes fields for 'Primary language', 'Secondary language', and 'Do you speak any other language(s)'. The 'Reset', 'Cancel', and 'Save' buttons are at the bottom right.

Assessment Details   **Forms**

**FV Program Assessment**

Client Background

Primary language: Select an Option

Secondary language: Select an Option

Do you speak any other language(s): Select an Option

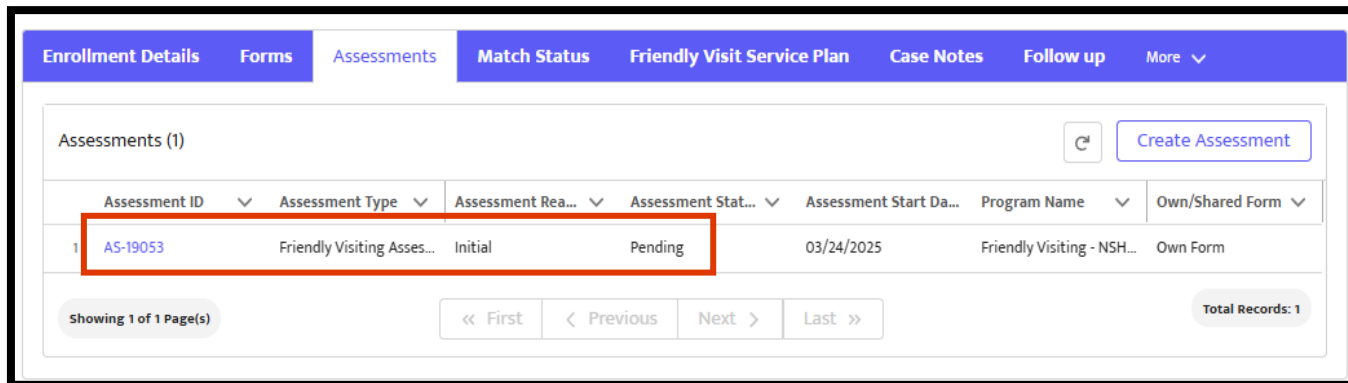
Reset   Cancel   Save

After entering or editing a Page View form, there are three additional actions to choose from:

- **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.

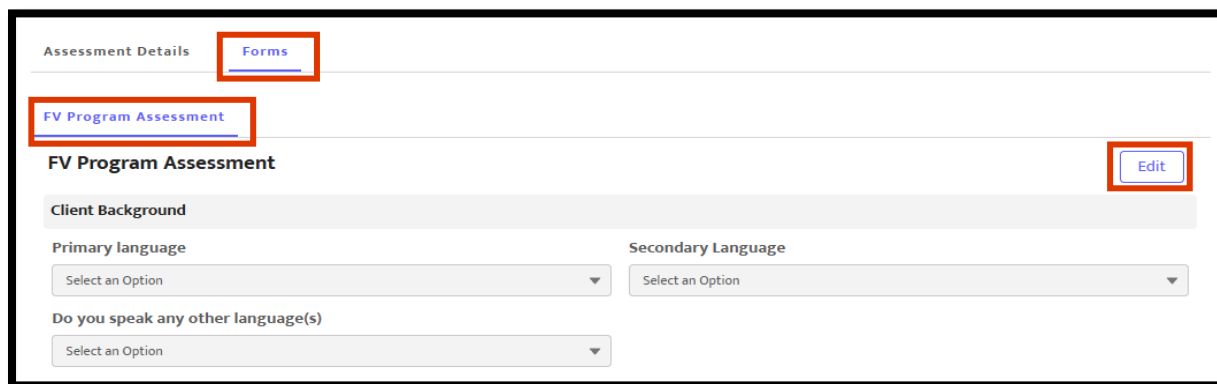
## Editing the Friendly Visiting Program Assessment

**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.



Assessment ID	Assessment Type	Assessment Rea...	Assessment Stat...	Assessment Start Da...	Program Name	Own/Shared Form
<a href="#">AS-19053</a>	Friendly Visiting Asses...	Initial	Pending	03/24/2025	Friendly Visiting - NSH...	Own Form

**Step 2:** From the **Assessment Details**, click on the **Forms** sub-tab. Select **Edit**.



Assessment Details **Forms**

[FV Program Assessment](#)

**FV Program Assessment** [Edit](#)

Client Background

Primary language:

Secondary Language:

Do you speak any other language(s):

**Step 3:** After entering the required information, select **Reset**, **Cancel** or **Save**.

**NOTE:** You cannot create more than one New Assessment at a time. If an Assessment is listed with the status of Pending, you cannot create another one until the current Assessment status become Completed.



## Ignore Cloning an Assessment

Cloning an Assessment does not apply to Friendly Visiting. This common button is only used by certain programs. **Friendly Visiting** programs can ignore this **Clone Assessment** button on the **Assessment Details** page of an assessment with a status of **Completed**.

Assessment AS-19052

Linked Enrollment: Friendly Visiting - NSHOPP - CMA | Contact: Alfred client | Assigned To: Karyn Velez

Assessment Details | Forms

Assessment ID: AS-19052 | Assessment Type: Friendly Visiting Assessment | Assessment Status: Completed

## Creating a New Loneliness/Social Isolation Form

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

**Step 2:** From the **Details** menu, click the **Enrollments** tab.

**Step 3:** From the **Enrollment Details Menu**, click the **Forms** tab.

Enrollment Details | Forms | Assessments | Match Status | Friendly Visit Service Plan | Case Notes | Follow up | Contacts | Documents | Status History

Loneliness/Social Isolation (FV)

Loneliness/Social Isolations (0)

Sr. No. | Loneliness Start Date | Loneliness Total Score | Social Start Date | Social Total Score | Own/Shared Form

New

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

**Step 5:** Enter all the required information.

The Loneliness/Social Isolation form has multiple actions after entering the page. They are:

- **Save:** The **Loneliness Serverity Rating**, **Loneliness Total Score**, **Social Isolation**

**Severity Rating** and **Social Isolation Total Score** are calculated. The information entered is saved and you stay on the form.

Loneliness/Social Isolation (FV)

In terms of family and friends, please select the response that would best describe your current relationships.

How many close friends do you have, people that you feel at ease with, can talk to about private matters? | How many relatives do you have, people that you feel at ease with that you can talk to about private matters?

Relationship Comments:

LONELINESS

\*Loneliness Screening Start Date: 3/24/2023 | \*Select Screening Location

In a typical week, how often do you feel lonely? | Loneliness Total Score

Loneliness Severity Rating

Save | Save & Exit | Cancel

- **Save & Exit:** The severity ratings and total scores are calculated, the information entered is saved and you return to the **Loneliness/Social Isolation (FV)** List View where ratings and scores are displayed.
- **Cancel:** Does not save any information and returns to List View.

**Step 6:** Select either **Save** or **Save & Exit**.

## Editing the Loneliness/Social Isolation Form

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

**Step 2:** From the **Details** menu, click the **Enrollments** tab.

**Step 3:** From the **Enrollment Details Menu**, click the **Forms** tab.

**Step 4:** Click the **Loneliness/Social Isolation** link.

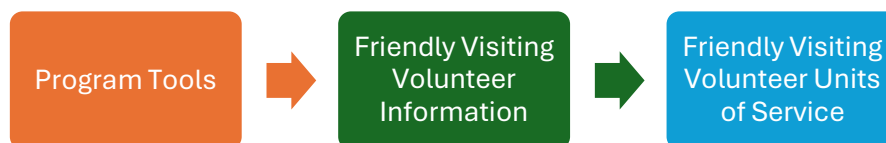
The screenshot displays the 'Loneliness/Social Isolation (FV)' form interface. At the top, there is a navigation bar with tabs: 'Enrollment Details', 'Forms', 'Assessments', 'Match Status', 'Friendly Visit Service Plan', 'Case Notes', 'Follow up', and 'More'. The 'Forms' tab is active. Below the navigation bar, the title 'Loneliness/Social Isolation (FV)' is displayed. A table titled 'Loneliness/Social Isolations (1)' shows one record with the following details: Sr. No. L/S-0061, Loneliness Start Date 03/25/2025, Loneliness Total Score 1, Social Start Date 03/25/2025, Social Total Score 1, and Own/Shared Form Own Form. The 'L/S-0061' cell is highlighted with a red box. Below the table, there are buttons: 'Reset', 'Cancel', 'Save', and 'Save & Exit'. The 'Save & Exit' button is highlighted with a red box. The form itself is titled 'Loneliness/Social Isolation (FV)' and contains sections for relationship comments, loneliness screening start date, screening location, and severity rating.

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:** Scores and severity ratings are calculated, the information entered is saved and you stay on the form.
- **Save & Exit:** Scores and severity ratings are calculated, the information entered is saved and you return to List View where ratings and scores are displayed.

**Step 5:** Select either **Save** or **Save & Exit**.

## New Volunteer Flow Chart



When entering a new volunteer in VIVÉ, the process follows the basic flow represented in the New Volunteer Flow Chart diagram above. This process is managed via the Program Tools section where both FV Volunteer Information and FV Units of Service are accessible.

## Friendly Visiting Volunteer Information

Within this section you can add a volunteer, search for volunteers, and edit a volunteer's information.

### Adding a New Volunteer

**Step 1:** From the **Top Menu**, click **Program Tools**. Click the **FV Volunteer Information** tab.

The screenshot shows the 'FV Volunteer Information' tab selected. Below the tab, there is a search bar labeled 'Search Volunteers...' and a 'New' button highlighted with a red box. Below the search bar is a table with the following data:

	Name	Status	Age	Address	Start Date	End Date
1	James Jones	Pending	80		01/16/25	
2	Gary Shivavi	Pending	65	123 WEST 123RD STREET, 5...	01/15/25	
3	test name	Pending	11		01/15/25	

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

**Step 3:** On the **New FV Volunteer Information** pop-up enter the required fields. Select **Save**.

The screenshot shows the 'New FV Volunteer Information' pop-up form. The form contains the following fields:

- \*First Name: Calvin
- \*Last Name: Helps
- Title: --None--
- Gender Identity: Male
- \*Date of Birth: Sep 10, 1998
- Cell Phone: 5558883434
- Home Phone:
- Work Phone:
- Email: chelps98@gmail.com
- Address: 35 CENTRAL PARK NORTH, 4, MANHATTAN, X

At the bottom right, the 'Save' button is highlighted with a red box.

The **FV Volunteer Information** form includes multiple sections: Details, Availability, Match Status, Notes and Documents.

The Details section includes multiple types of information. The sections can be collapsed or expanded. Click the **Caret** to the to reveal additional information or hide information.

FV Volunteer Information  
jim jones

Update Volunteer Status

Details Availability Match Status Notes Documents

> Information

▼ Emergency Contact Information

Emergency Contact Name Emergency Contact Relationship

Emergency Contact Phone 1 Emergency Contact Email

> Additional Volunteer Information

> If you have volunteer experience, please describe below

> Preferences

For example, the Emergency Contact Information caret is facing down and displaying more fields.

Use the pencil icons to enter additional information. Confirm that all required fields are completed before selecting **Save**.

## Adding Volunteer Availability

The Availability form provides the ability to capture details associated with the days and times the volunteer can visit clients. To complete the form:

**Step 1:** From the **Top Menu**, click **Program Tools**. Click the **FV Volunteer Information** tab. Select **Name** link for volunteer.

FV Volunteer Information FV - Units of Service Survey Invitation Links Ticketing Module

FV Volunteer Information (1)

Search: calvin

New

Name	Status	Age	Address	Start Date	End Date
1 Calvin Helps	Pending	27	35 CENTRAL PARK NORTH...	03/25/25	

**Step 2:** Select the **Availability** link and then the **New** button.

FV Volunteer Information Calvin Helps

Update Volunteer Status

Details Availability Match Status Notes Documents

Availability (1)

New

Availability Name	Matched with multiple clients?	Availability Start Date	Availability End Date
AB-0035	Yes	3/27/2025	

View All

**Step 3:** On the **New Availability** pop-up pick the **Start Date** from the dropdown.

Highlight the times and use the triangles of the multi-select fields to move times from **Available** to **Chosen**.

If a choice is made in error, use the left-facing arrow to move the choice back to its original box. Confirm that all required fields are completed before selecting **Save**.

## Editing Volunteer Availability

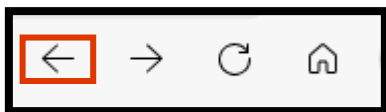
**Step 1:** From the **Top Menu**, click **Program Tools**. Click the **FV Volunteer Information** tab.

**Step 2:** From **FV Volunteer Information**, click on the volunteer's name link.

**Step 3:** Click the **Availability** sub-menu.

**Step 4:** Click any pencil icon to open fields for editing. Select **Save** when completed.

**Step 5:** Use the browser’s back arrow at the top left of the screen to return to the Availability List View.



## Volunteer Documents

From the volunteer’s details page, upload information, such as driver’s license, to the **Documents** section.

Details

Availability

Match Status

Notes

Documents

Documents (1)

Add Document

	Document Type	Document Title	Access Level	Uploaded By	Status	Uploaded Date	Program Name	
1	Applications	FV Application.png	Program Level	David Dring	Active	Apr 9, 2025	Friendly Visiting - NSHOPP...	

To add a new document, select the **Add Document** button and follow the common procedures.

To change the status of a document, click on the downward facing arrow and select **Edit Status**.

## Adding Volunteer Notes

From the volunteer’s details section, add, filter, edit and print notes.

Details	Availability	Match Status	Notes	Documents	
<div> <div> From To </div> <div> <input type="text"/> <input type="text"/> </div> <div>Filter</div> </div>					
Notes (1)					
Event Date	Subject	Comments	Created By	Last Modified By	Program Name
04/10/2025	Excellent first meeting with Jan...	Met with Janetta at her house ...	David Dring	David Dring	Friendly Visiting - NSHOPP - C...
					<div> </div>
					<div> </div>

## Match Status

**Match Status** is the function that enables you to match a client with a volunteer. This match can be done either in the client’s or volunteer’s record. Once completed in one record, the match status is reflected in both records.

## Creating Match – Client Process

To create a match between an FV client and volunteer, a volunteer must be within the system. (See above for instructions on entering a volunteer.) Next, are the steps to create a match from the Client file.

**Step 1:** From the **Top Menu**, click **Client Search** or **Referral Queue**, search for the client and click their name link.

**Step 2:** From the **Details** menu, click the **Enrollments** tab.

**Step 3:** From the **Enrollment Details Menu**, click the **Match Status** tab. Select the **New Match Status** button.

**Step 4:** On the **New Match Status** pop-up complete the required fields. The volunteer field uses type-ahead technology. Start typing a volunteer's name and pick one from the list. Select **Save**.

The screenshot shows the 'New Match Status' pop-up form overlaid on the 'Enrollment Details' page. The background page has a header 'Enrollment Friendly Visiting - NSHOPP - CMA' with buttons 'Assign Worker' and 'Closing Enrollment'. Below the header, it shows 'Contact: Peter Lorne' and 'Assigned To: Karyn Velez'. The 'Match Status' tab is selected in the navigation bar. The 'New Match Status' form contains fields for 'Start Date' (Apr 10, 2025), 'End Date', 'Volunteer' (with a type-ahead search showing 'jen' and a dropdown list), 'Contact' (Peter Lorne), 'Volunteer Mobile Phone Number', 'Match Status' (a dropdown menu), and 'Enrollment' (Friendly Visiting - NSHOPP - CMA). At the bottom of the form are 'Cancel' and 'Save' buttons. Red boxes highlight the 'New Match Status' button on the background page, the 'Volunteer' field in the pop-up, and the 'Save' button in the pop-up.

## Creating a Match – Volunteer Process

Similarly, a match can be created from a volunteer's details page.

**Step 1:** From the **Top Menu**, click **Program Tools**, click the **FV Volunteer Information** tab.

**Step 2:** From the **FV Volunteer Information** List View, click on a volunteer's **Name** link. Click on the **Match Status** link.

**Step 3:** Select the **New Match Status** button.

The screenshot displays the VIVÉ system interface. In the background, a volunteer profile for 'jim jones' is visible, with tabs for Details, Availability, Match Status, Notes, and Documents. The 'Match Status' tab is active, showing a table with one row for 'Match Status (0)'. Overlaid on this is the 'New Match Status' pop-up form. This form includes fields for Start Date (set to Apr 10, 2025), End Date, Volunteer (selected as jim jones), Volunteer Home Phone Number, and Match Status (a dropdown menu showing 'Select an Option'). A search bar for 'Contact' is also present, displaying a list of contacts: John Thompson (1501374706), Joseph Gladstone (0999001607), Abraham Beauplan (0999001668), Peter Lorre (0999006781), and test-pilar client. The 'New Match Status' button in the background is highlighted with a red box.

**Step 4:** On the **New Match Status** pop-up complete the required fields. The client field uses type-ahead technology. Start typing a client's name and pick one. Select **Save**.

## Finalizing Friendly Visit Service Plan

When a “match” is made between the client and volunteer and the service is ready to start, you must update **Friendly Visit Service Plan** so the referring program can be alerted to the new service status.

**NOTE:** *The original service plan is created by the referring Case Management Agency.*

## Updating the Friendly Visit Service Plan

**Step 1:** From the **Top Menu**, click **Client Search** or **Referral Queue**, search for the client and click their name link.

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



**Step 3:** From the **Enrollment Details Menu**, click the **Friendly Visit Service Plan** tab. The service plan will be in **Draft** status. Click the **Friendly Visit Service Plan** name link.

**Step 4:** From the **FV Service Plan** details, select the **Status** dropdown and pick **Service Started**. Select **Save**.

This will update the view of the service plan for the case management agency as well.

The top screenshot displays the 'Enrollment Details' for 'Friendly Visiting - NSHOPP - CMA'. It includes tabs for 'Enrollment Details', 'Forms', 'Assessments', 'Match Status', 'Friendly Visit Service Plan', 'Case Notes', 'Follow up', and 'More'. A table titled 'Friendly Visit Service Plans (1)' shows a single entry with ID 'FV-00127' and status 'Draft'. The bottom screenshot shows the 'FV Service Plan' details for 'FV-00127'. It includes fields for 'Contact' (Peter Lorne), 'Assigned To' (Karyn Velez), 'Friendly Visiting Program' (Friendly Visiting - NSHOPP - CMA), 'Authorization Date' (Mar 21, 2025), and 'Service Authorization' (Outreach). The 'Status' dropdown is set to 'Service Started', and the 'Save' button is highlighted.

## Closing the Friendly Visit Service Plan

If the client no longer wishes to participate in the friendly visiting service program the “match” must first be dissolved and then the service plan closed.

### Dissolving Match Status

**Step 1:** From the **Top Menu**, click **Program Tools**, click the **FV Volunteer Information** tab.

**Step 2:** From the **FV Volunteer Information** List View, click on a volunteer’s **Name** link. Click on the **Match Status** link.

**Step 3:** From the **Match Status** List View click on client’s **Match Status ID** link.

The **Match Status Details** page will display. In the **Match Status** field choose **Match Dissolved** from dropdown. Select **Save**.

The top screenshot displays the 'FV Volunteer Information' for 'George Burns'. It includes tabs for 'Details', 'Availability', 'Match Status', 'Notes', and 'Documents'. A table titled 'Match Status (3)' shows two entries with IDs 'MS-3475' and 'MS-0010'. The bottom screenshot shows the 'Match Status Details' for 'MS-3475'. It includes fields for 'Name' (MS-3475), '\*Start Date' (May 7, 2025), 'Contact' (test-noah client), 'Volunteer Mobile Phone Number', 'Owner' (Friendly Visiting - NSHOPP - CMA), and 'Match Status' (Matched). The 'Match Status' dropdown is set to 'Match Dissolved', and the 'Save' button is highlighted.

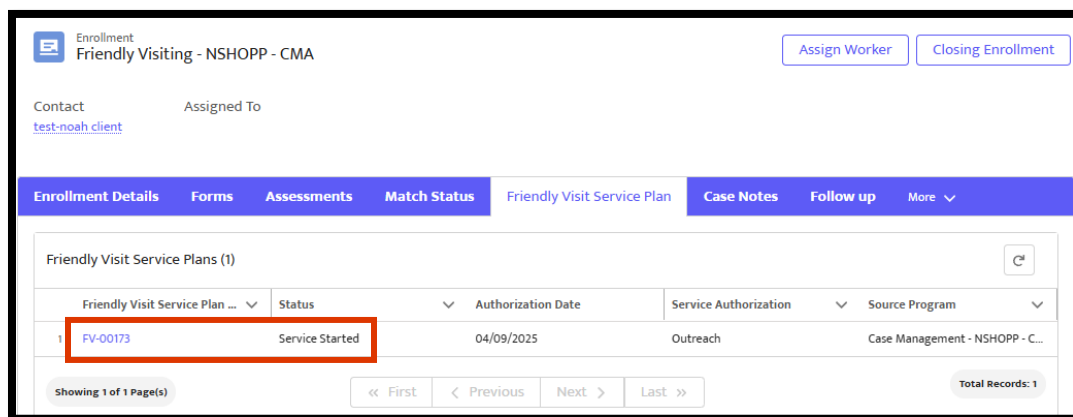
The match will now have a status of Match Dissolved on the List View.

## Closing the Service Plan

**Step 1:** From the **Top Menu**, click **Client Search** or **Referral Queue**, search for the client and click their name link.

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

**Step 3:** From the **Enrollment Details Menu**, click the **Friendly Visit Service Plan** tab. The service plan will be in **Service Started** status. Click the **Friendly Visit Service Plan** name link.



Enrollment  
Friendly Visiting - NSHOPP - CMA

Assign Worker Closing Enrollment

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

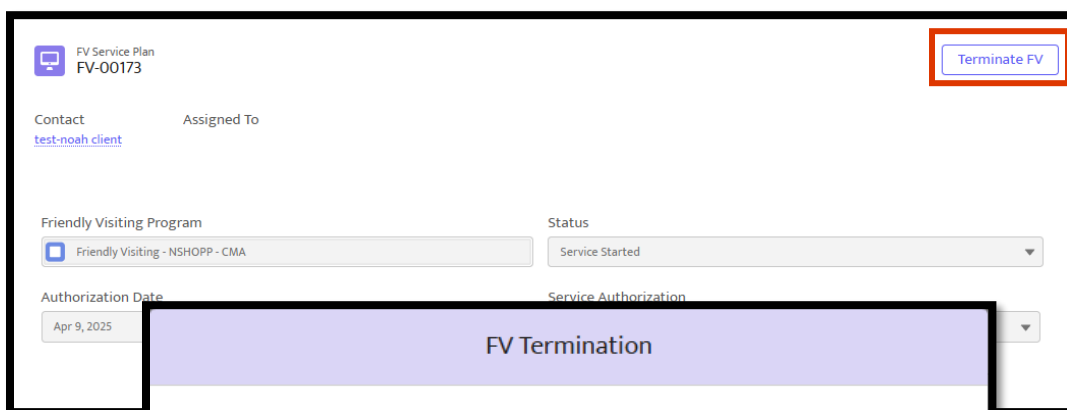
Enrollment Details Forms Assessments Match Status Friendly Visit Service Plan Case Notes Follow up More

Friendly Visit Service Plans (1)

Friendly Visit Service Plan ...	Status	Authorization Date	Service Authorization	Source Program
<a href="#">FV-00173</a>	Service Started	04/09/2025	Outreach	Case Management - NSHOPP - C...

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

**Step 4:** From the **FV Service Plan** details, select the **Terminate FV** button.



FV Service Plan  
FV-00173

Assign Worker

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

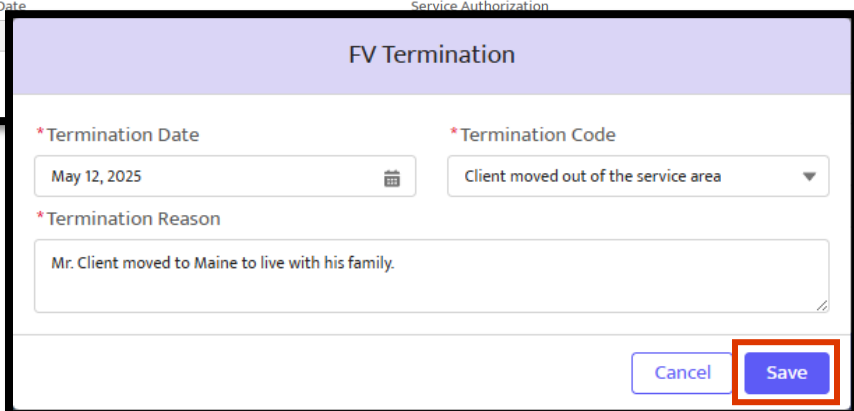
Friendly Visiting Program Status  
☒ Friendly Visiting - NSHOPP - CMA Service Started

Authorization Date Service Authorization  
Apr 9, 2025

Terminate FV

**Step 5:** On the **FV Termination** pop-up completed all required fields. **Termination Date** can only be in future. Select **Save**.

The service plan will now have a status of **Terminated** on the List View. The client's enrollment in the Friendly Visiting Program can now be closed.



FV Termination

\* Termination Date  
May 12, 2025

\* Termination Code  
Client moved out of the service area

\* Termination Reason  
Mr. Client moved to Maine to live with his family.

Cancel Save

VIVÉ automatically updates the Case Management Program that made the initial service request of the termination.

**NOTE:** Termination of the **Friendly Visit Service Plan** will automatically close the client's **Enrollment** in the program once the termination date has been reached.

## Friendly Visiting Volunteer Units of Service

This sub-tab allows you to log **Units of Service** provided by your volunteers.

### Adding a New FV – Units of Service Record

**Step 1:** From the **Top Menu** click **Program Tools**. Click on the **FV – Units of Service** tab. A List View displays the program's units of service records by month/year to date. Each record has a status of either **Draft** or **Final**.

Select **New**.

**Step 2:** From the **FV- Units of Service** form confirm the **Status**, **Year** and **Month**.

**Step 3:** Select **Calculate** to update the numbers and display the list of matches.

**NOTE:** You cannot create a service form for a month or year that is in the future.

**Step 4:** For the active matches, enter their units across the row of 6 fields: visits, calls, etc.

Use the **Search** field to find a specific volunteer by typing either their name, their VIVÉ ID or the name of the client they are matched with.

Once all units are entered, select **Save**.

**FV - Units of Service**

\* Program: Friendly Visiting - NSHOPP - CMA

\* Status: Draft

\* Year: 2025

\* Month: March

Total # of In-Person Visits: 5.00

Total # of In-Person Hours: 5.00

Total # of Telephone Calls: 4.00

Total # of Telephone Hours: 2.00

Total # of Virtual Visits: 0.00

Total # of Virtual Visit Hours: 0.00

Total # of units for the month: 9.00

**Recalculate** Last Calculated Date: 03/25/2025

**FV - Units of Service Items**

Search: Cal

Volunteer ID	Volunteer Name	Client ID	Matched Client	Start Date	End Date	# of In-Person Visits	# of In-Person Hours	# of Telephone Calls	# of Telephone Hours
V-00061	Calvin Helps	0999006781	Peter Lorre	03/25/2025		5.00	5.00	4.00	2.00
V-00061	Calvin Helps	0999006790	test-bradley client	03/25/2025		8.00	2.00	10.00	5.00

**Cancel Save Finalize**

NOTE: If you proceed, the program user will not be allowed to edit the units or enter new units for this month.

## Editing an Existing FV – Units of Service Record

**Step 1:** From the **Top Menu** click **Program Tools**. Click on the **FV – Units of Service** tab.

**Step 2:** Click the **Name** link of a draft FV Unit of Service form.

**Step 3:** Browse or use the **Search** field to select the volunteer whose service units need editing. Update the desired data and select **Save**.

## Finalizing Existing FV – Units of Service Record

**Step 1:** From the **Top Menu** click **Program Tools**. Click on the **FV – Units of Service** tab.

**Step 2:** Click the **Name** link of a draft FV Unit of Service form.

**Step 3:** After confirming each entry twice, select the **Final** button at the bottom of the form.

**NOTE:** Once an **FV – Units of Service** record is finalized it cannot be edited. Be sure to enter all necessary data before finalizing any records.

## 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](#)