

MAY 9, 2025

VIVÉ REFERENCE GUIDE

FRIENDLY VISITING



Welcome to the Detailed VIVÉ Reference Guide on Friendly Visiting

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

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

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[Return to VIVÉ Knowledge Base](#)

The VIVÉ Friendly Visiting 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 **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
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- **Access Assistance with VIVÉ and the VIVÉ Knowledge Base**

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

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

VIVÉ: Flow Diagrams

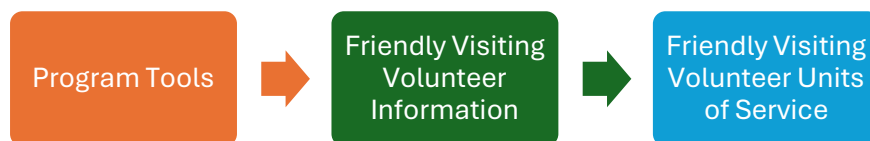
The following flow diagrams illustrate the navigation processes for key aspects of your work. These diagrams provide a general overview of the steps involved in completing key tasks, while also showcasing the various sections of the VIVÉ database. Detailed instructions on how to enter information will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

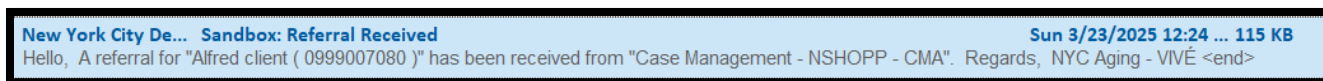


Referral Queue

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.

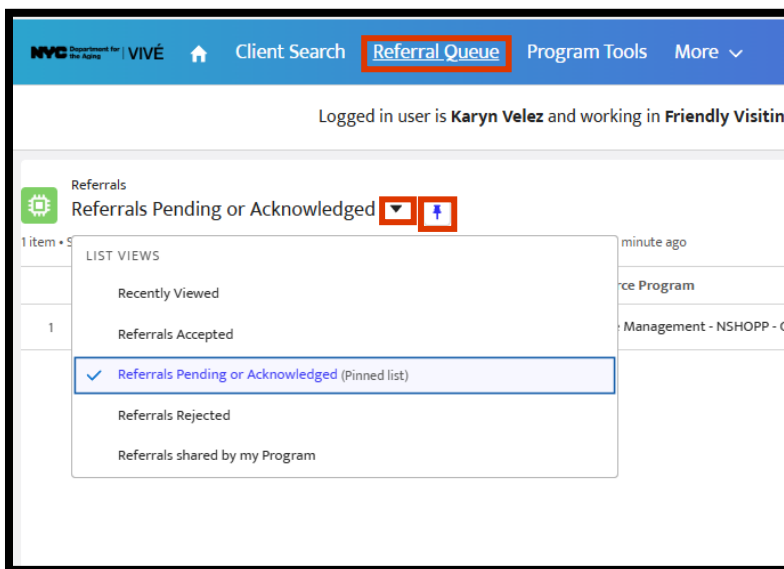


Reviewing a New Client Referral for Acceptance or Rejection

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.

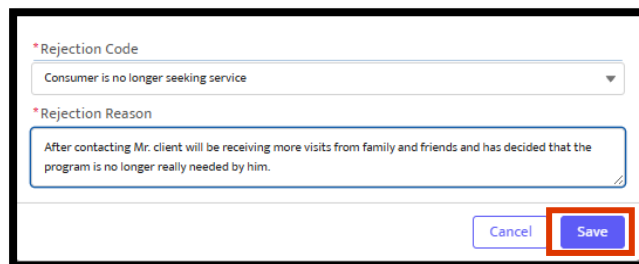
Select the **Acknowledge** button to let the referring program know the referral was received. They see the update on their **Referrals shared by my Program List View**.

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**.

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.

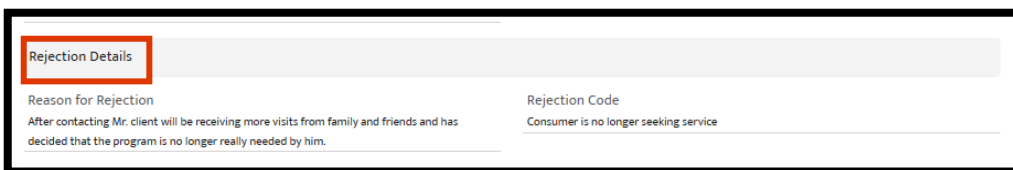
The referral moves from the list **Referrals Pending or Acknowledged** to **Referrals Accepted** on the queue. The referring program is updated to this acceptance on their **Referral Queue** listing.

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 pop-up window with two text input fields. The first field is labeled '*Rejection Code' and contains the text 'Consumer is no longer seeking service'. The second field is labeled '*Rejection Reason' 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.' At the bottom right, there are two buttons: 'Cancel' and 'Save'.

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. The 'Rejection Details' section is highlighted with a red box. It contains two fields: 'Reason for Rejection' with 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.' and 'Rejection Code' with the text 'Consumer is no longer seeking service'.

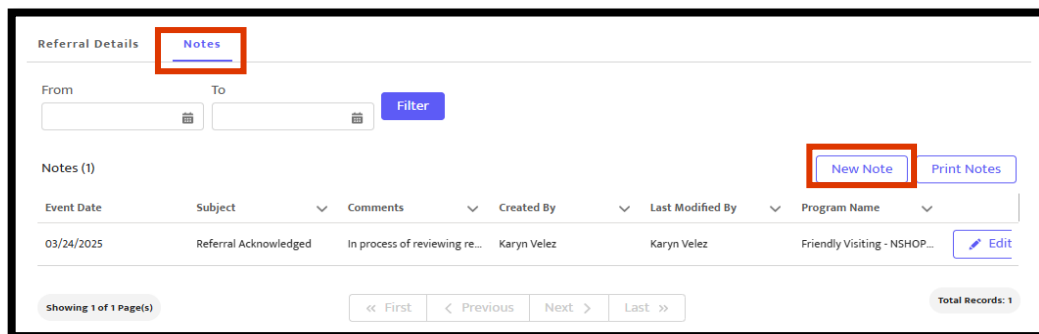
VIVÉ automatically updates the **Referrals shared by my Program** List View of the program that made the initial service request.

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.



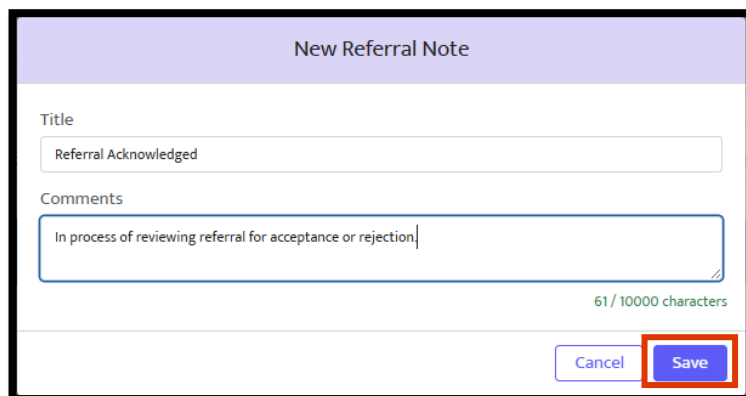
A screenshot of the 'Referral Details' page. The 'Notes' sub-menu link is highlighted with a red box. Below it, there is a 'Filter' button and a 'Notes (1)' section. The 'Notes (1)' section contains a table with columns: Event Date, Subject, Comments, Created By, Last Modified By, Program Name, and an 'Edit' button. The table has one row with the following data: Event Date: 03/24/2025, Subject: Referral Acknowledged, Comments: In process of reviewing re..., Created By: Karyn Velez, Last Modified By: Karyn Velez, Program Name: Friendly Visiting - NSHOP... At the bottom, there is a 'Showing 1 of 1 Page(s)' label, navigation buttons (First, Previous, Next, Last), and a 'Total Records: 1' label.

Adding a New Referral Note:

Select the **New Note** button.

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

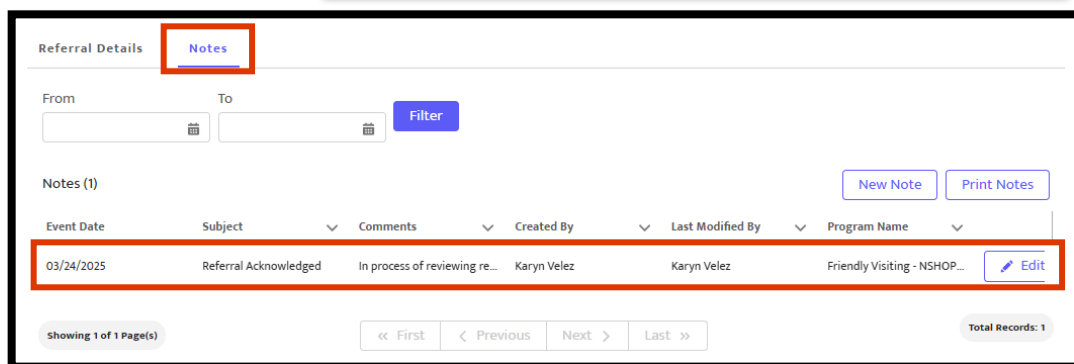
You return to the List View where information about the note is displayed. An **Edit** button is available to the far-right of the note row.



The 'New Referral Note' form has a purple header. It contains a 'Title' field with the text 'Referral Acknowledged' and a 'Comments' text area with the text 'In process of reviewing referral for acceptance or rejection'. A character count '61 / 10000 characters' is shown. At the bottom right are 'Cancel' and 'Save' buttons, with 'Save' highlighted by a red box.

Editing a Referral Note

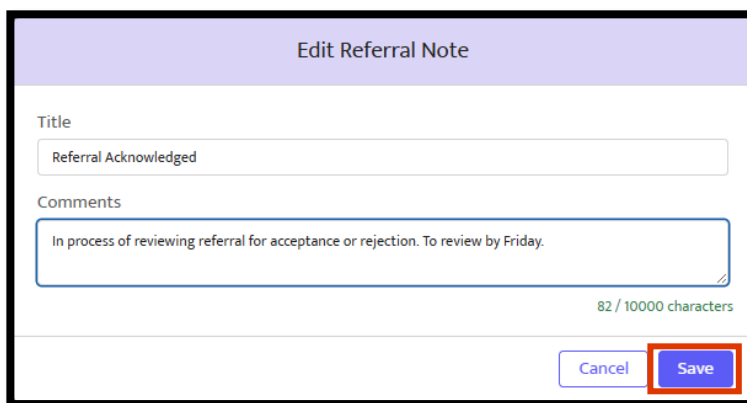
Select **Edit** at the right end of the note row on the **Notes** List View.



The 'Notes List View' shows a table with columns: Event Date, Subject, Comments, Created By, Last Modified By, and Program Name. A red box highlights the first row, which has an 'Edit' button at its right end. Above the table is a 'Notes (1)' section with 'New Note' and 'Print Notes' buttons. A 'Referral Details' tab is active, and a 'Notes' tab is highlighted with a red box. At the bottom, there are pagination controls and a 'Total Records: 1' indicator.

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

The edited item reflects on the List View.



The 'Edit Referral Note' form has a purple header. It contains a 'Title' field with the text 'Referral Acknowledged' and a 'Comments' text area with the text 'In process of reviewing referral for acceptance or rejection. To review by Friday.' A character count '82 / 10000 characters' is shown. At the bottom right are 'Cancel' and 'Save' buttons, with 'Save' highlighted by a red box.

Enrollment

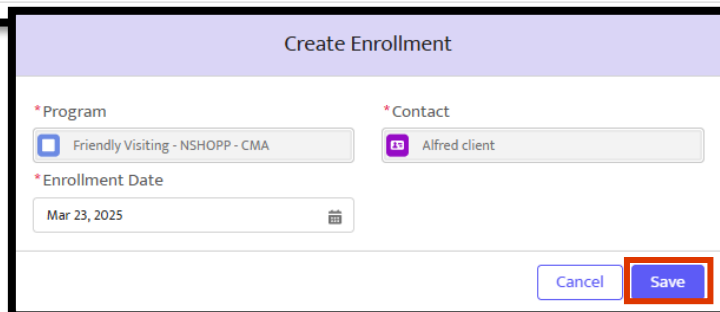
Enrollment is the process of moving the client into your program so further actions can be taken in their record. This process also enables the assignment of a worker to a client's case.

Enrollment of a New Client

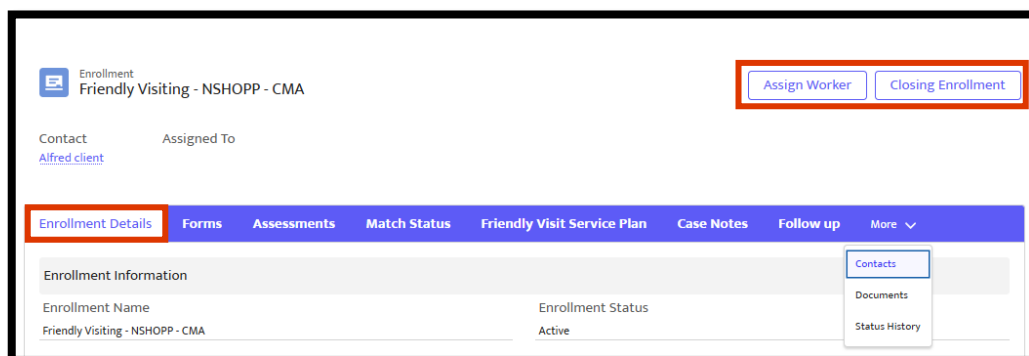
Step 1: After a client is accepted on the **Referral Details** page, select the **Create Enrollment** button.

A screenshot of the 'Referral Details' page. At the top left, there is a green icon and the text 'Referral RF-84519'. At the top right, there is a blue button labeled 'Create Enrollment' which is highlighted with a red rectangle. Below the header, there are two tabs: 'Referral Details' and '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**.

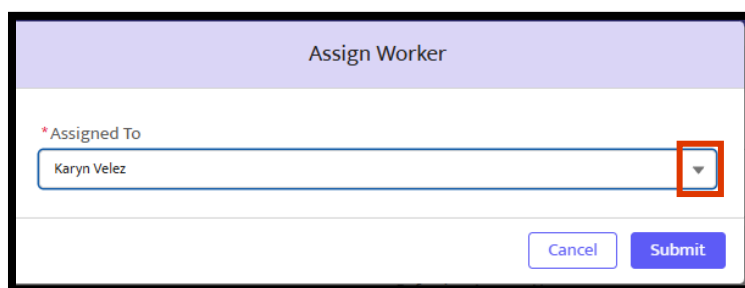
A screenshot of the 'Create Enrollment' pop-up form. It has a purple header with the title 'Create Enrollment'. There are two main sections: '* Program' and '* Contact'. The 'Program' section has a dropdown menu showing 'Friendly Visiting - NSHOPP - CMA'. The 'Contact' section has a dropdown menu showing 'Alfred client'. Below these is the '* Enrollment Date' section with a text input field containing 'Mar 23, 2025' and a calendar icon. At the bottom right, there are two buttons: 'Cancel' and 'Save', with 'Save' highlighted by a red rectangle.

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**.

A screenshot of the 'Enrollment Details' menu. At the top, there is a blue header with the text 'Enrollment Friendly Visiting - NSHOPP - CMA'. Below this, there are two buttons: 'Assign Worker' and 'Closing Enrollment', both highlighted with red rectangles. The main content area has a tabbed interface with 'Enrollment Details' selected. Below the tabs, there is a table with two columns: 'Enrollment Information' and 'Enrollment Status'. The 'Enrollment Information' column shows 'Enrollment Name' as 'Friendly Visiting - NSHOPP - CMA'. The 'Enrollment Status' column shows 'Active'. On the right side, there is a dropdown menu with options: 'Contacts', 'Documents', and 'Status History'.

To Assign Worker:

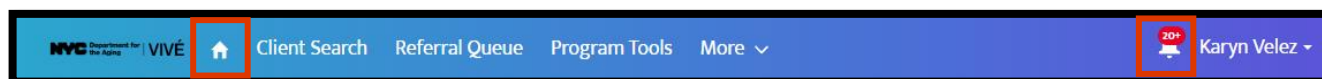
Step 1: From the **Enrollment Details Menu** in the upper right-hand corner, select **Assign Worker**. In the pop-up, use the dropdown menu to pick a team member to assign to this client.

A screenshot of the 'Assign Worker' pop-up form. It has a purple header with the title 'Assign Worker'. There is a section labeled '* Assigned To' with a dropdown menu showing 'Karyn Velez'. The dropdown menu is highlighted with a red rectangle. At the bottom right, there are two buttons: 'Cancel' and 'Submit'.

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.



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.

To Close Enrollment:

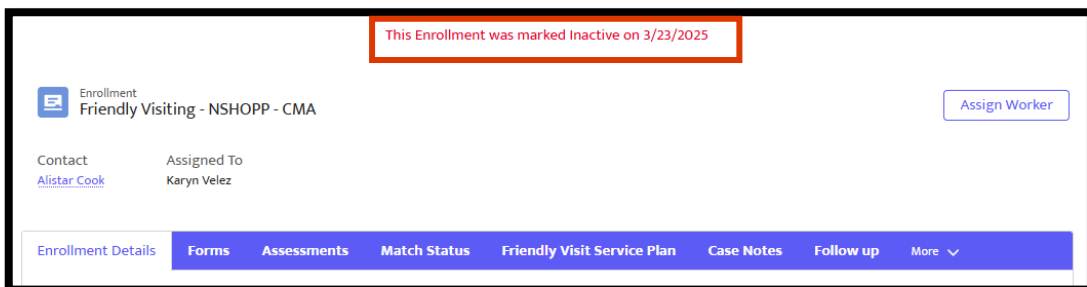
Step 1: From the **Enrollment Details Menu**, select the **Closing Enrollment** button to inactivate the client from your program. Closing this enrollment will not close any enrollments with other NYC Aging programs.



Step 2: From the **Closing Enrollment** pop-up choose the **Closing Date** field. This date can be backdated or set in the future.

Step 3: Use the dropdown arrow to pick a reason for the closure. Confirm that all required fields are completed before selecting **Save**.

You return to the **Enrollment Details Menu** 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.

Step 4: Select Exit at the bottom of Enrollment Details. You return to the Enrollments tab on the Details menu level where the List View shows the enrollment status as Inactive. The New button is still available if the client needs to be re-enrolled into your program.

Enrollments (2)				
Enrollment Name	Enrollment Status	Enrollment Date	Program	
1 Friendly Visiting - NSHOPP - CMA	Inactive	03/23/2025	Friendly Visiting - NSHOPP - CMA	

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.

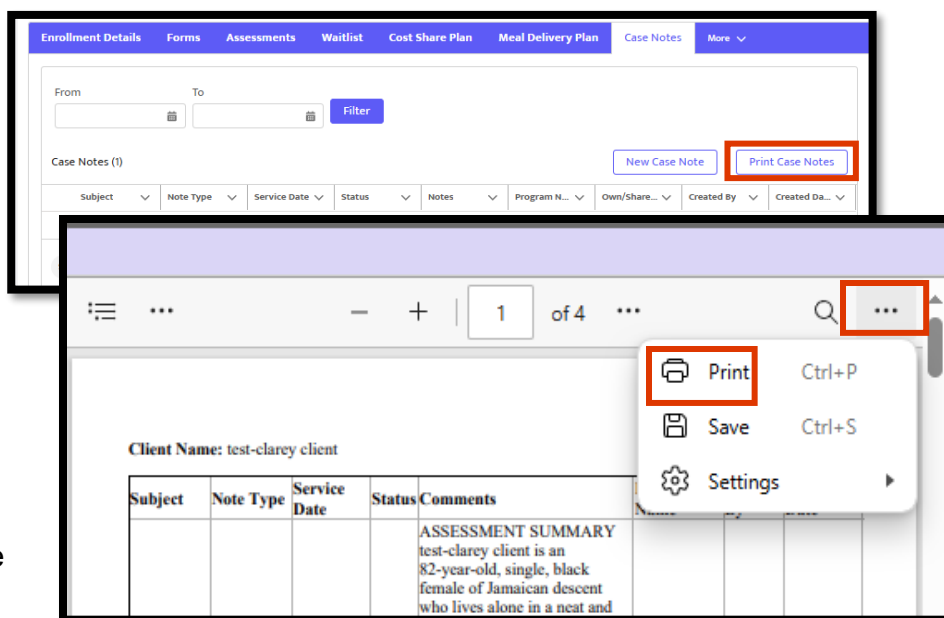
If you want this case note to be shared with the client's case management program, be sure to select the **Share with Other Programs** checkbox before selecting **Submit**.

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 and values:

- Service Date:** 3/24/2025
- Status:** Draft
- *Subject:** Initial Assessment Phone Call
- Program Name:** Friendly Visiting - NSHOPP - CMA
- Notes:** Completed the initial assessment on the telephone. Also completed the loneliness and social isolation assessment.
- Created By:** Karyn Velez
- Last Modified By:** Karyn Velez
- Owner:** Friendly Visiting - NSHOPP - CMA

At the bottom, there are three buttons: 'Cancel', 'Save', and 'Exit'. 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 overlay. The message reads: 'We hit a snag. Review the errors on this page. You cannot edit this record because you do not have permission to modify records owned by other programs.' The 'Save' button is disabled, and the 'Cancel' button is visible.

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 red box highlights the 'Create Assessment' button in the top right corner of the table.

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. The form contains the following fields:

- * Assessment Type:** Friendly Visiting Assessment
- * Assessment Reason:** Initial
- * Assessment Date:** Mar 24, 2025
- Contact:** Peter Lorre
- Enrollment:** Friendly Visiting - NSHOPP - CMA

A red box highlights the 'Save' button at the bottom right of the form.

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.

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.

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
AS-19053	Friendly Visiting Asses...	Initial	Pending	03/24/2025	Friendly Visiting - NSH...	Own Form

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

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

Select an Option Select an Option

Do you speak any other language(s)

Select an Option

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 Reason Initial	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)

[New]

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

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

Loneliness/Social Isolation (FV)

[Save] [Save & Exit] [Cancel]

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: 3/24/2025 | * Select Screening Location

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

Loneliness Severity Rating

- **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.

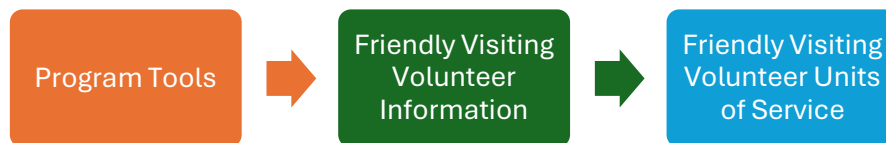
Step 4: Click the **Loneliness/Social Isolation** link.

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

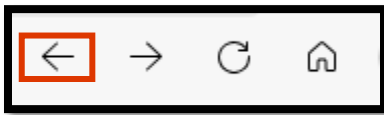
Step 1: From the **Top Menu**, click **Program Tools**. Click the **FV Volunteer Information** tab.

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

From

To

Filter

Notes (1)

New Note

Print Notes

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...	Edit

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'. A navigation bar includes 'Enrollment Details', 'Forms', 'Assessments', 'Match Status', 'Friendly Visit Service Plan', 'Case Notes', 'Follow up', and 'More'. The 'Match Status' tab is active, showing 'Match Status (0)' and a 'Sr. No.' field. A 'New Match Status' button is highlighted in the top right. The pop-up form has fields for 'Start Date' (Apr 10, 2025), 'End Date', 'Volunteer' (with a type-ahead search showing 'jen'), 'Contact' (Peter Lorne), 'Volunteer Mobile Phone Number', 'Match Status' (a dropdown menu), and 'Enrollment' (Friendly Visiting - NSHOPP - CMA). 'Cancel' and 'Save' buttons are at the bottom right.

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.

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

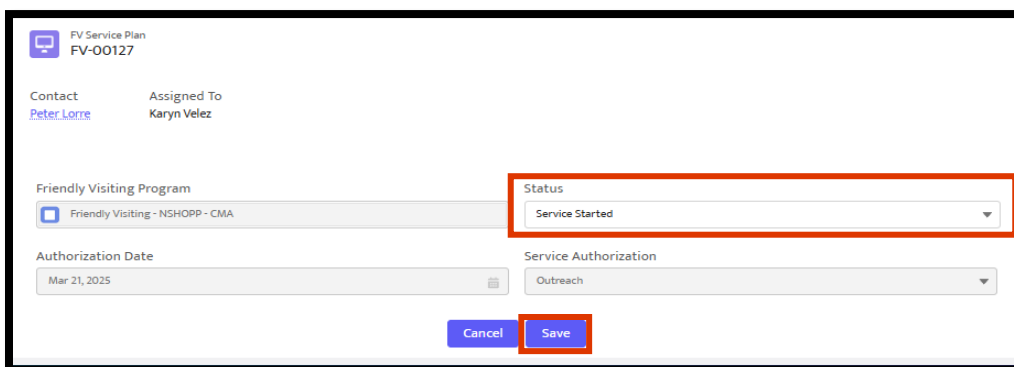
Step 1: From the **Top Menu**, click **Client Search** or **Referral Queue**, search for the client and click their name link.

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.



FV Service Plan
FV-00127

Contact: Peter Lorne | Assigned To: Karyn Velez

Friendly Visiting Program: Friendly Visiting - NSHOPP - CMA

Authorization Date: Mar 21, 2025 | Service Authorization: Outreach

Buttons: Cancel, Save

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**

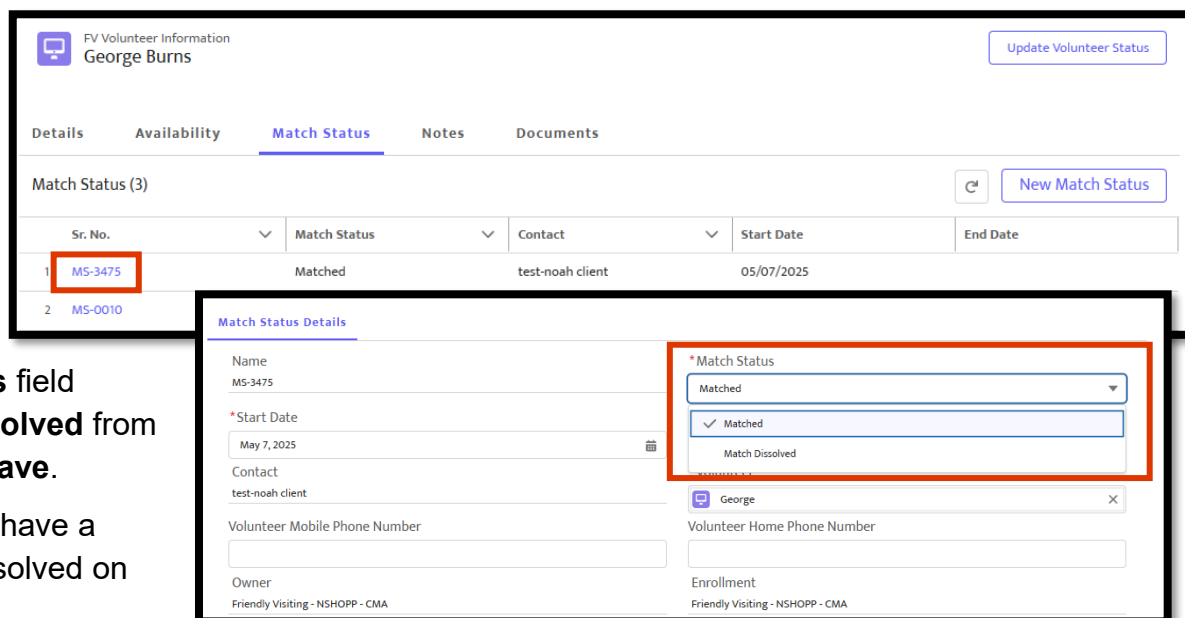
List View click on client’s **Match Status ID** link.

The **Match Status Details**

page will display.

In the **Match Status** field choose **Match Dissolved** from dropdown. Select **Save**.

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



FV Volunteer Information
George Burns

Buttons: Update Volunteer Status

Tabs: Details, Availability, Match Status, Notes, Documents

Match Status (3) | New Match Status

Sr. No.	Match Status	Contact	Start Date	End Date
1	MS-3475	test-noah client	05/07/2025	
2	MS-0010			

Match Status Details

Name: MS-3475

*Start Date: May 7, 2025

Contact: test-noah client

Volunteer Mobile Phone Number: [Empty]

Owner: Friendly Visiting - NSHOPP - CMA

*Match Status: Matched (dropdown menu open showing Matched, Match Dissolved)

George (dropdown menu open showing George)

Volunteer Home Phone Number: [Empty]

Enrollment: Friendly Visiting - NSHOPP - CMA

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
FV-00173	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

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

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.

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

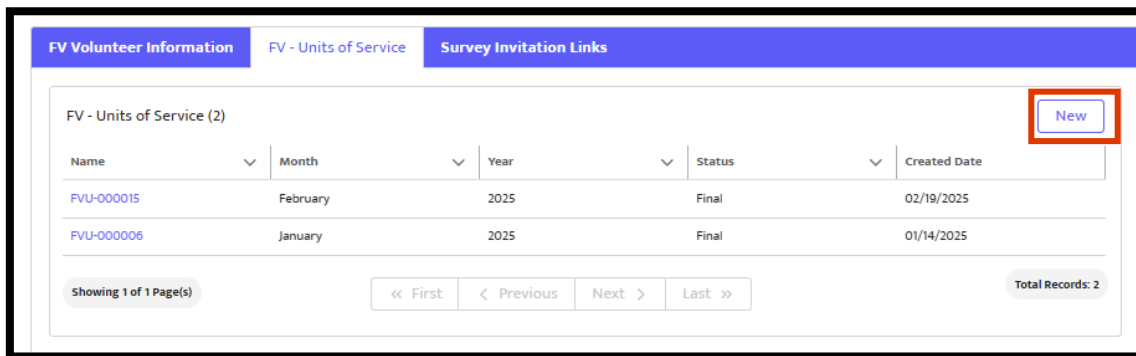
Friendly Visiting Volunteer Units of Service

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**.



The screenshot shows the 'FV - Units of Service' tab selected. A table lists two records:

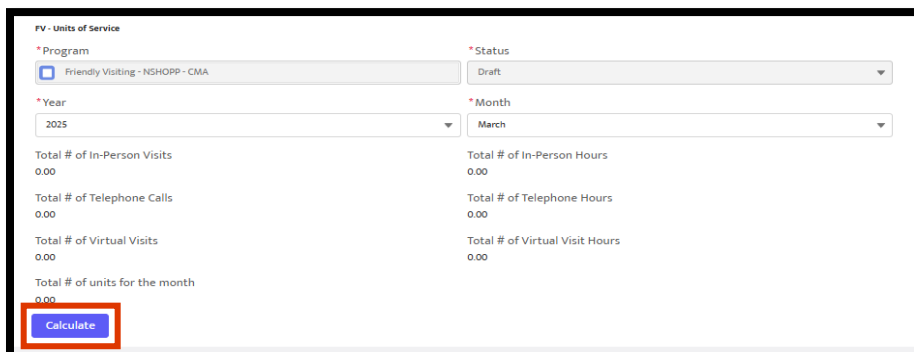
Name	Month	Year	Status	Created Date
FVU-000015	February	2025	Final	02/19/2025
FVU-000006	January	2025	Final	01/14/2025

At the bottom right, a 'New' button is highlighted with a red box. Navigation controls at the bottom show 'Showing 1 of 1 Page(s)', 'First', 'Previous', 'Next', 'Last', and 'Total Records: 2'.

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.



The screenshot shows the 'FV - Units of Service' form. Fields include:

- Program:** Friendly Visiting - NSHOPP - CMA
- Status:** Draft
- Year:** 2025
- Month:** March

Summary statistics on the right:

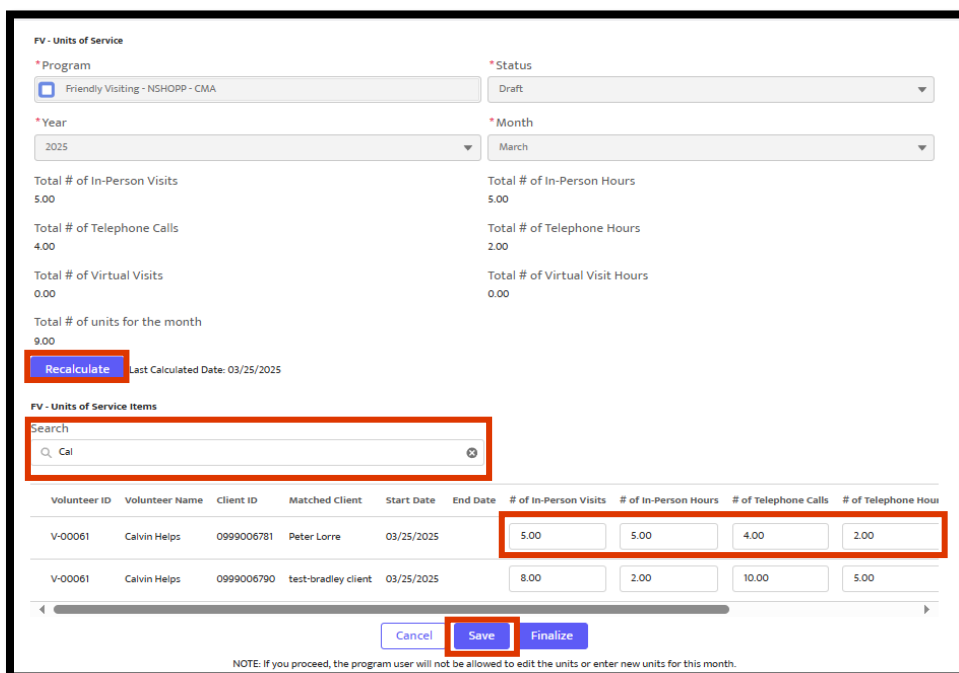
- Total # of In-Person Visits: 0.00
- Total # of In-Person Hours: 0.00
- Total # of Telephone Calls: 0.00
- Total # of Telephone Hours: 0.00
- Total # of Virtual Visits: 0.00
- Total # of Virtual Visit Hours: 0.00
- Total # of units for the month: 0.00

A 'Calculate' button is highlighted with a red box at the bottom left.

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](#)

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:

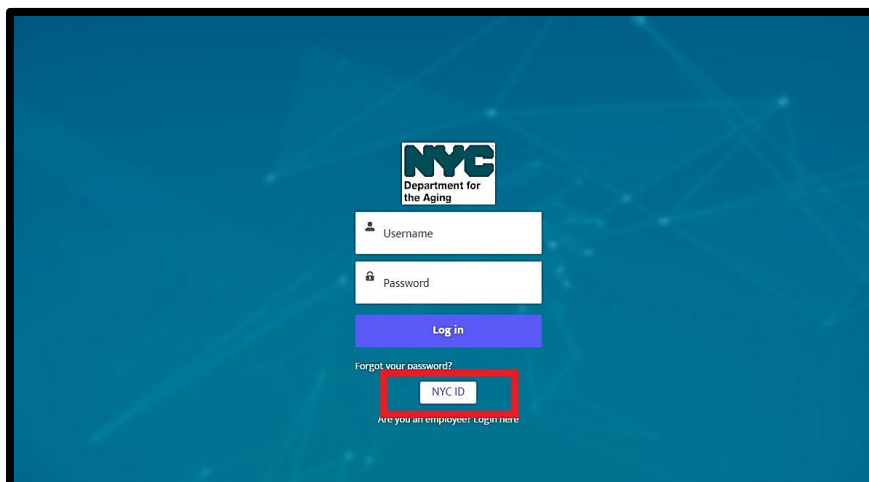
- **Logging into VIVÉ**
- **Accessing NYC.ID**

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:

VIVÉ Knowledge Base – NYCID

- Login with a NYC ID account or with the other email options listed.
- Get help with your password
- Create an account
- Report an issue, such as inability to login.

The Official Website of the City of New York

NYC

Login

Log in using your NYC account

Email Address or Username *

Password *

Login

Log in using one of these options

NYC Employees

Google

Microsoft

LinkedIn

Yahoo

or

Create Account

Forgot Password

Report an Issue

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

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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

[Return to VIVÉ Knowledge Base](#)

The VIVÉ Referral Guide

VIVÉ is a customized client management system designed by NYC Aging. This system supports NYC Aging contractors in managing their client interactions and reporting on services provided. This reference guide provides instructions on navigating, accessing and managing Referrals.

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

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

In this guide you will learn:

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

Overview of Referrals

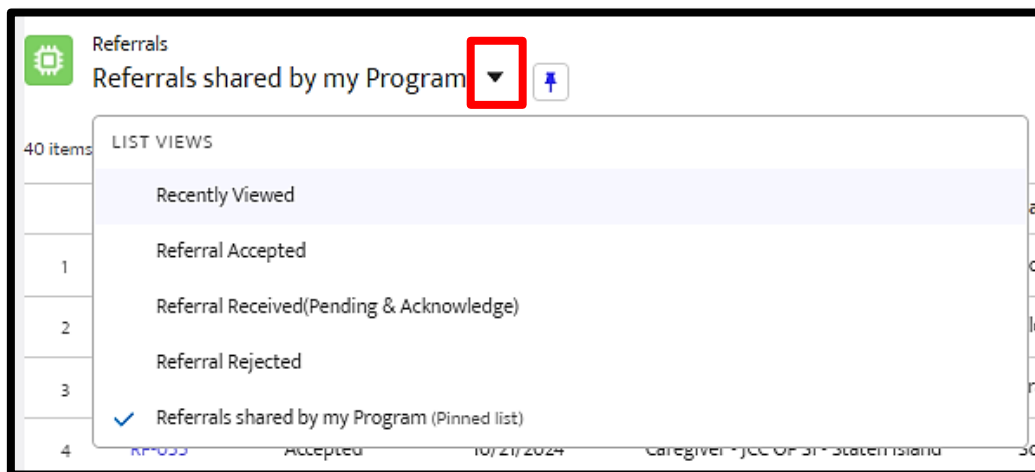
The **Referral Queue** enables users to view and manage referrals. Users are able to refer a client from one NYC Aging program to another. Each program has different places (targets) that they can refer a client. Referrals can be in various states: sent, pending, acknowledged (reviewed by the target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

Viewing Referrals

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



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



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

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

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



Referrals
Referrals shared by my Program

42 items • Sorted by Referral Status • Filtered by All referrals - Check Referral Sent • Updated a minute ago

Search this list...

Referral ...	Referral St... ↑	Referral Date	Source Program	Target Program	External Age...	Contact
1 RF-044	Referral Sent	10/21/2024	Caregiver - JCC OF SI - Staten Island		NYC Connect	Henry Farber
2 RF-095	Referral Sent	10/25/2024	Caregiver - JCC OF SI - Staten Island	Case Management - CASC - CMA		Dorothy Buscemi


Referral Details

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

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

- **Acknowledge:** the user acknowledges the referral.
- **Accept:** the user accepts the referral for services.

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

 Referral
RF-84483

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

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

Referral Information

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

Services Requested

Friendly Visiting

System Information

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

Accepting an Enrollment

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

 Referral
RF-051

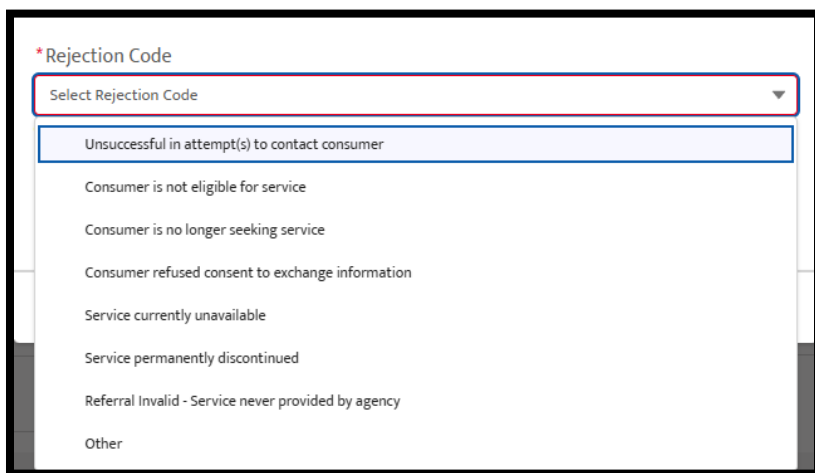
[Go to Enrollment](#)

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

Referral Information

Rejecting an Enrollment

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



A screenshot of a web application showing a dropdown menu for "Rejection Code". The dropdown is open, displaying a list of rejection reasons. The first option, "Unsuccessful in attempt(s) to contact consumer", is highlighted in blue. The other options are listed below it.

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

Cancelling a Referral

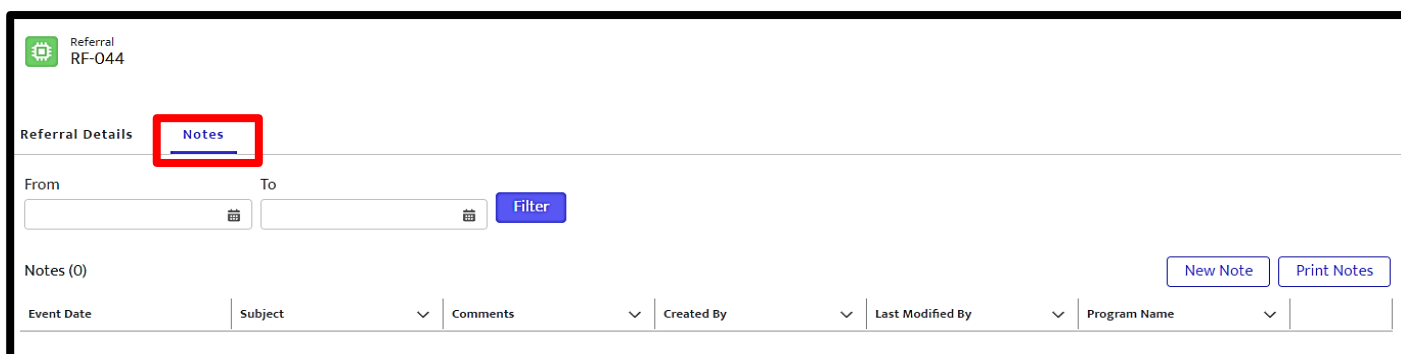
Referrals that have not yet been accepted/rejected may be cancelled by the source program.



A screenshot of the "Referral RF-248" details page. The page has a header with a green gear icon and the text "Referral RF-248". On the right side of the header, there is a red-bordered button labeled "Cancel Referral". Below the header, there are two tabs: "Referral Details" and "Notes".

Referral Notes

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



A screenshot of the "Referral RF-044" page, specifically the "Notes" tab. The "Notes" tab is highlighted with a red box. Below the tabs, there is a search area with "From" and "To" date pickers and a "Filter" button. Below the search area, there is a section for "Notes (0)" with "New Note" and "Print Notes" buttons. At the bottom, there is a table with columns: "Event Date", "Subject", "Comments", "Created By", "Last Modified By", and "Program Name".


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.

VIVÉ Knowledge Base – Referral

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



Name
Janetta Q Shields

Inactivate Client Profile

Contact Type
Client

Date of Birth
3/23/1935

Phone
(212) 602-4459

Home Address
[300 EAST 5TH STREET, MANHATTAN, NY 10003](#)

Details

Consents

Contacts

General Comments

Referrals

Enrollments


Unit Entry

Documents

Program History

Profile Update History

Referrals (1)

New Referral

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

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

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

Step 5: Select **Save**.

The screenshot shows the 'Client Referral Form' with the following fields: 'Referral Date' (Apr 1, 2025), 'Is for external agency?' (checkbox), 'Source Program' (Case Management - CASC - CMA), '*Target Program' (Friendly Visiting - CASC - CMA), 'Comments' (text area), '*Service Requested' (info icon), 'Available Services' (Information, Outreach), and 'Selected Services' (Assistance). The 'Target Program' dropdown and the 'Information' service are highlighted with red boxes. A right-facing triangle button is also highlighted with a red box.

Completing Consent to Refer

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

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

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

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

The screenshot shows the 'Client Referral Form' with an error message at the top: 'A consent to refer is required. Please click on Create below.' The 'Create Consent to Refer' button is highlighted with a red box. The form fields are the same as in the previous screenshot.

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

- [VIVÉ Knowledge Base](#) contains reference guides, short videos and recorded training.
- 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](#)

Using the VIVÉ Client Search Reference Guide

VIVÉ is a customized client management system designed by NYC Aging. This system supports NYC Aging contractors in managing their client interactions and reporting on services provided. This reference guide provides instructions on conducting client searches in VIVÉ.

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

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

In this guide you will learn:

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

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

Client Search Overview

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

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

Client Search

Beginning Your Client Search

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



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

*** Contact Type**

☒ Client ☐ Contact ☐ Professional

To begin the client search you can either:

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

*** Contact Type**

☒ Client ☐ Contact ☐ Professional

First Name Last Name Date of Birth

Client ID Phone Email

☐ Search by address?

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...	

VIVÉ Knowledge Base – Client Search

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



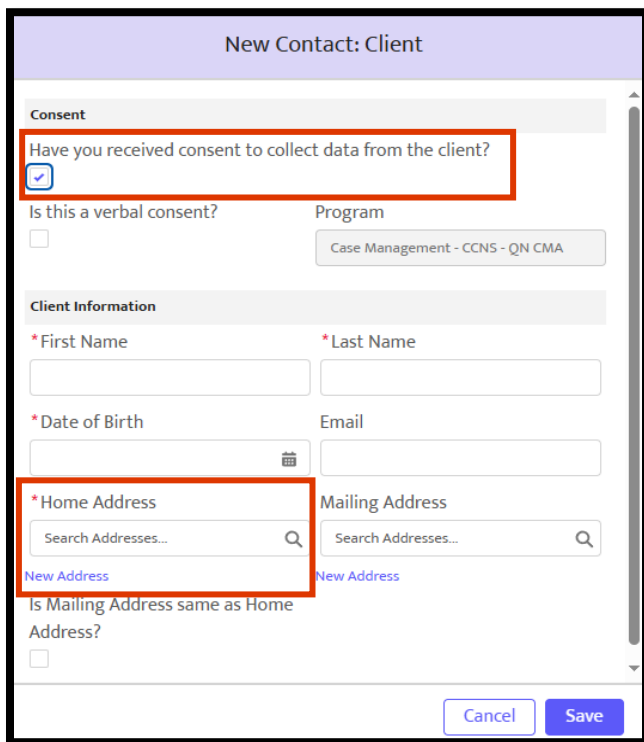
To enable the 'New Client' button, confirm that no matching result was found.

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

New Client

New Client Entry

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



New Contact: Client

Consent

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

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

Client Information

* First Name * Last Name

* Date of Birth Email

* Home Address Mailing Address
 Search Addresses... Search Addresses...

New Address New Address

Is Mailing Address same as Home Address?
☐

Cancel Save

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

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

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

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

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

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

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**.

[Return to VIVÉ Knowledge Base](#)

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

VIVÉ Knowledge Base – Case Notes

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

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

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

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

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

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

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

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

Select **Submit** to save the note.

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

Editing Case Notes

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

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

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

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

From To [Filter](#)

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

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

Showing 1 of 1 Page(s) [« First](#) [< Previous](#) [Next >](#) [Last »](#) Total Records: 2

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

Details

Service Date
12/13/2024

Subject
Intake details

Program Name
Older Adult Center - BAY RIDGE - Life Long

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

Created By
David Dring

Owner
Older Adult Center - BAY RIDGE - Life Lo

Status
Draft

Note Type
Phone Call

Share with other programs?
☐

Last Modified By
David Dring

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

Finalizing Case Notes

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

Details

Service Date

12/13/2024

*Subject

Intake details

Program Name

Older Adult Center - BAY RIDGE - Life Long

Comments

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

Status

Final

--None--

Draft

✓ Final

Inactive

* = Required Information

Printing Case Notes

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

Enrollment DetailsFormsEvent SignupCase NotesUnit EntryFollow upContactsDocumentsStatus History

FromTo

Filter

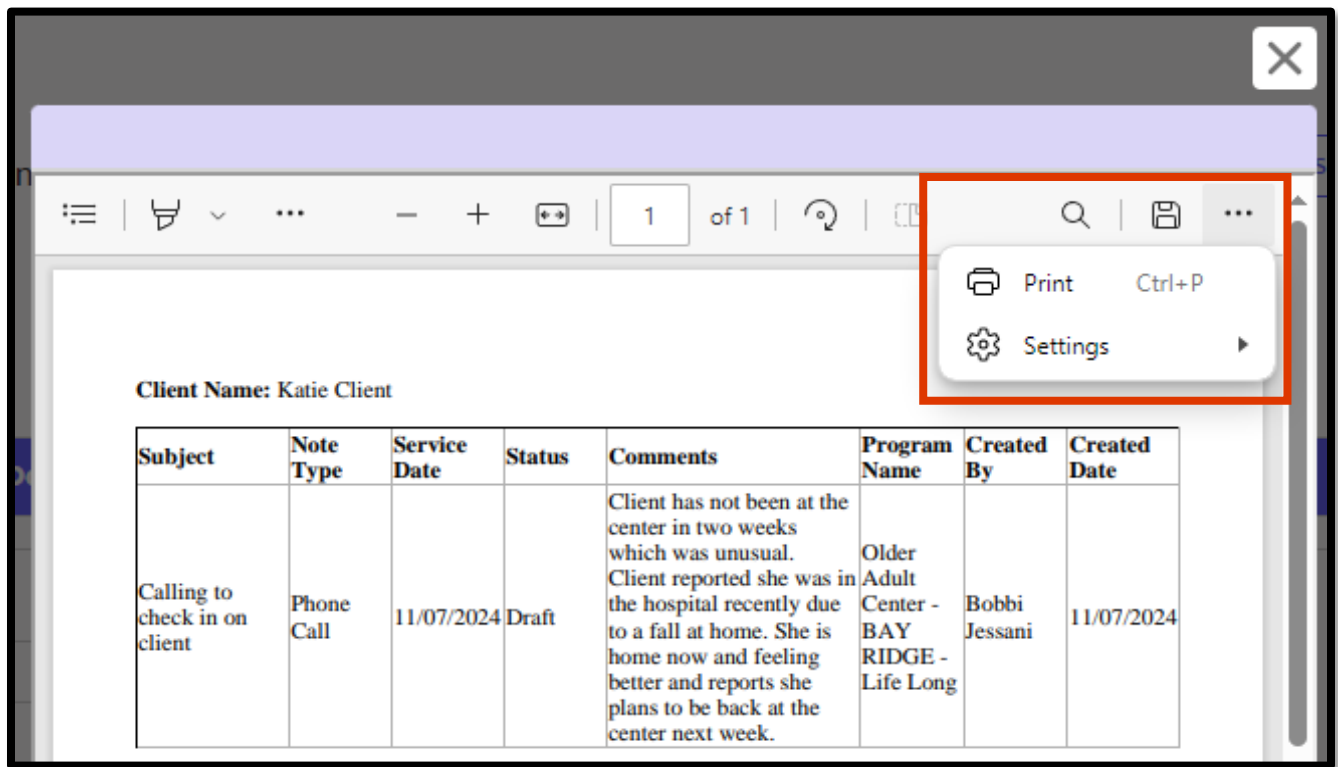
Case Notes (8)

New Case NotePrint Case Notes

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

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

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

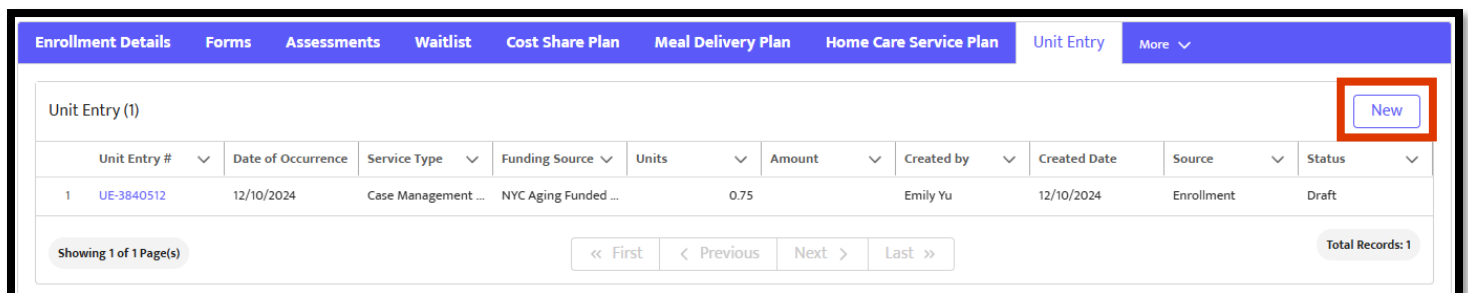


Linking Case Notes to Units

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

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

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



VIVÉ Knowledge Base – Case Notes

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

Unit Entry

* Date of Occurrence

Jan 27, 2025

Enrollment

Case Management - NSHOPP - CMA

* Service Type

Case Management - DFTA Funded

* Funding Source

NYC Aging Funded Service

* Time Spent

60 min

Service Comments

see case note

* Status

Draft

Client

Everything VIVÉ

Host Type

Telephonic

Unit Type

Hour

* Total Units

1.00

Case Notes

<input checked="" type="checkbox"/>	Subject	Note Type	Contact Name	Service Date	Status	Created Date	Created Name
<input checked="" type="checkbox"/>	Spoke with Landlord on behal...	Phone Call	Everything VIVÉ	01/27/2025	Final	01/28/2025	David Dring

Showing 1 of 1 Page(s)

<< First

< Previous

Next >

Last >>

Total Records: 1

Cancel

Save

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

- [VIVÉ Knowledge Base](#) contains reference guides, short videos and recorded trainings.
- Direct toward ticketing vs email: 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 Client Profile Reference Guide

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

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

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

In this guide you will learn:

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

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

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

Client Profile Overview

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

The **Client Profile** is the destination of any client name links whether from the **Client Search** results or from an enrollment form. If you are directed to the **Client Profile** from a **Client Search**, you may only view basic information until you confirm that you have consent (for more information on [Consent](#)).

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

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

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

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

- [Details](#) – provides access to the Sub-details menu. (see below for more information on the Sub-details menu)
- [Consent](#) – where details on the types of consent are listed, indicated, and uploaded.
- [Contacts](#) – where to search, edit, and create contacts.

- [General Comments](#) – a place to make general comments; these are not case notes.
- [Referrals](#) – where to view and make client referrals.
- [Enrollments](#) – where to enroll a client into your program, view active and inactive enrollments and manage the client’s engagement with your program.
- [Unit Entry](#) – where to enter units of services offered directly to the client.
- [Documents](#) – where to upload, download, and view a list of documents
- [Program History](#) – where to see a list of programs that the client is enrolled in.
- [Profile Update History](#) – Client Details are accessible to every user of VIVÉ. This area lists the changes that anyone makes to the client’s record.

Details Tab

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

Sub-Details: Basic Demographics

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

The screenshot shows the 'Details' tab in the VIVÉ system. The 'Basic Demographics' sub-tab is selected and highlighted with an orange box. The form contains the following fields:

Details	
Consents Contacts General Comments Referrals Enrollments Unit Entry Documents Program History Profile Update History	
Basic Demographics Social Demographics Emergency Preparedness Financial NYSOFA Additional Info	
ID	Status
0000000103	Active
* Last Name	Suffix
Shields	
* First Name	Title
Janetta	--None--
Middle Initial/Name	Preferred Name
Q	
* Date of Birth	Age
Mar 23, 1935	89
* Home Address	Is Mailing Address same as Home Address?
300 EAST 5TH STREET, MANHATTAN, NY 10003	<input checked="" type="checkbox"/>

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



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

Sub-Details: Social Demographics

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

The screenshot shows the 'Social Demographics' sub-tab selected in the client profile system. The form includes the following fields:

- Current Marital Status:** A dropdown menu with 'Widowed' selected.
- Lives With:** A dropdown menu with 'Alone' selected.
- Frail and/or disabled:** A dropdown menu with '--None--' selected.
- Number of pets owned by client:** A text input field.
- Type of pets owned by client:** A section with two columns: 'Available' and 'Chosen'.
 - Available:** A list containing 'Cat', 'Dog', and 'Fish'.
 - Chosen:** A list containing 'No pets'.

Sub-Details: Emergency Preparedness

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

The screenshot shows the 'Emergency Preparedness' tab in the VIVÉ Client Profile. The 'Date' field is set to 'Jan 20, 2025'. The 'Consents to share emerg prep info' dropdown menu is open, displaying the following options: '--None--', '--None--' (which is selected and has a checkmark), 'Yes', and 'Refuses to Provide'. A 'Cancel' button is located below the dropdown.

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

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

The screenshot shows the 'Emergency Preparedness' tab in the VIVÉ Client Profile. The form includes the following fields and sections:

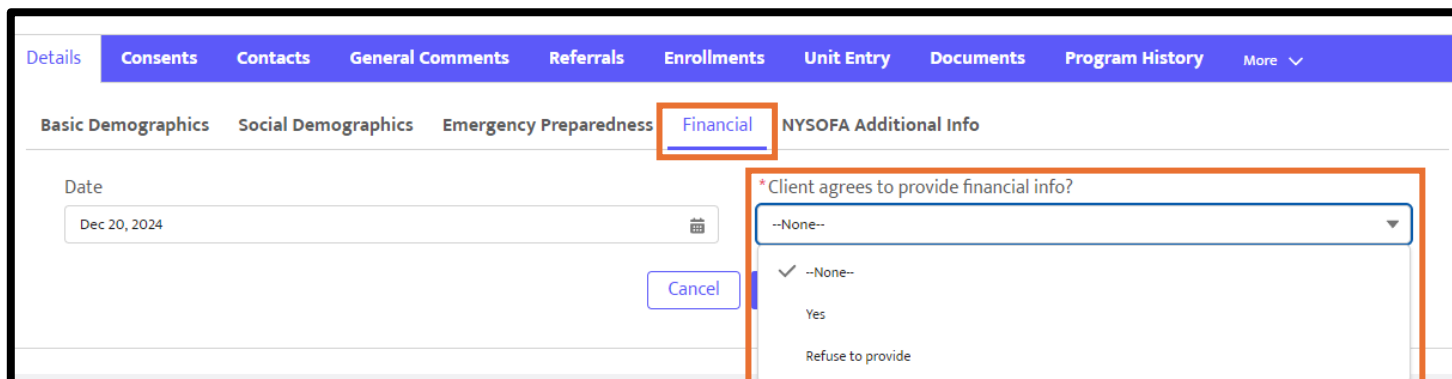
- Date:** Jan 20, 2025
- Consents to share emerg prep info:** Yes
- Revokes consent to share emerg prep info:** (empty field)
- Emergency Preparedness - Shelters require that pet owners have documentation verifying that all vaccinations are current.**
- Age:** 80
- Lives With:** Alone
- Elevator and/or Steps:** Elevator only
- Reliant on life-sustaining equip (LSE)?** No, no one in the home is reliant on LSE
- Client is dependent upon:**
 - Available:** Dialysis, Oxygen, Respirator, Wheelchair
 - Chosen:** Insulin, Walker or cane
- Communication Needs:**
 - Client's primary language:** English
 - Client speaks English:** Very Well

Sub-Details: Financial

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

VIVÉ Knowledge Base – Client Profile

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



The screenshot shows the 'Financial' tab of a client profile. The 'Date' field is set to 'Dec 20, 2024'. A dropdown menu is open, displaying the question '* Client agrees to provide financial info?' with three options: '--None--' (selected), 'Yes', and 'Refuse to provide'. A 'Cancel' button is visible below the date field.

Tab	Field	Value
Details	Consents	Consents
Details	Contacts	Contacts
Details	General Comments	General Comments
Details	Referrals	Referrals
Details	Enrollments	Enrollments
Details	Unit Entry	Unit Entry
Details	Documents	Documents
Details	Program History	Program History
Details	More	More
Basic Demographics	Social Demographics	Social Demographics
Emergency Preparedness	Financial	Financial
NYSOFA Additional Info		
Date		Dec 20, 2024
* Client agrees to provide financial info?		--None--
		Yes
		Refuse to provide

VIVÉ Knowledge Base – Client Profile

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

The screenshot shows the 'Financial' tab of the VIVÉ Client Profile. The 'Household Size' dropdown menu is highlighted with a red box and contains the value '1'. Other visible fields include 'Date' (Oct 21, 2024), 'Total of Asset Value' (\$0.00), 'Total of Household Amount (Yearly)' (\$10,200.00), and 'Total of Expenses (Yearly)' (\$3,600.00). A checkbox for '* Client agrees to provide financial info?' is checked.

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

The screenshot shows the 'Incomes' tab of the VIVÉ Client Profile. A 'New' button is highlighted with a red box. Below it is a table with 3 columns: 'Income ID', 'Monthly Income Info. compl...', and 'Sources of income'. The table lists two income sources: 'Rental Income' (750) and 'Interest' (500).

To Enter Income

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

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

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

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

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

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

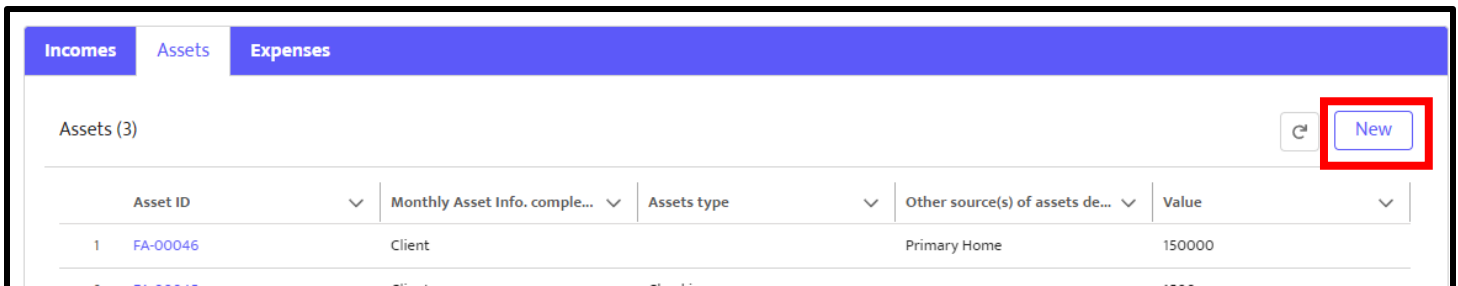
VIVÉ Knowledge Base – Client Profile

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

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

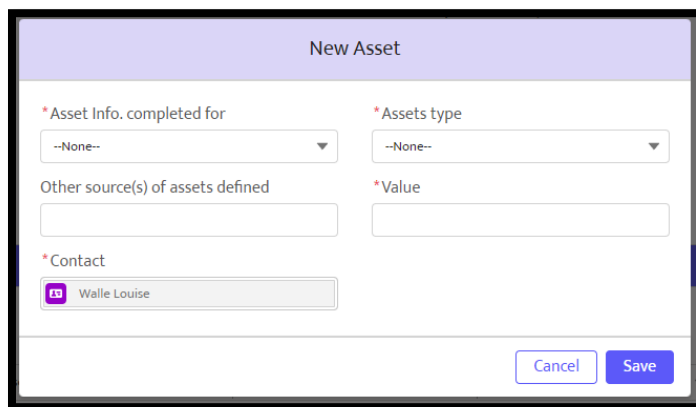
To Enter Assets

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



The screenshot shows the 'Assets' tab selected in a navigation bar with 'Incomes' and 'Expenses' tabs. Below the tabs, there is a section titled 'Assets (3)' with a 'New' button highlighted in a red box. Below this is a table with columns: Asset ID, Monthly Asset Info. comple..., Assets type, Other source(s) of assets de..., and Value. The table contains one row with the following data: 1, FA-00046, Client, Primary Home, 150000.

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



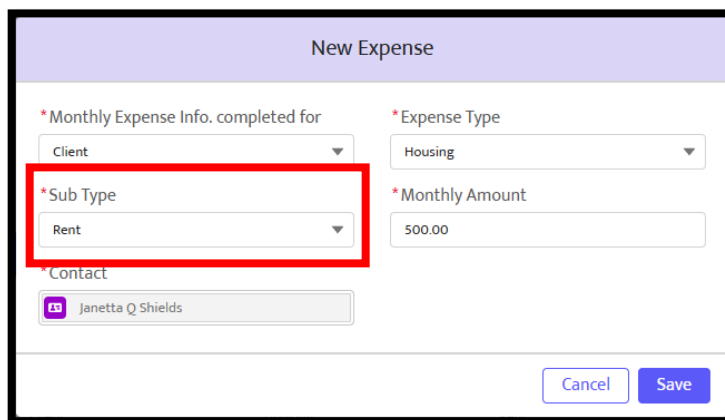
The screenshot shows the 'New Asset' pop-up form. It has a purple header with the title 'New Asset'. The form contains several fields: '* Asset Info. completed for' (dropdown menu with '--None--'), '* Assets type' (dropdown menu with '--None--'), 'Other source(s) of assets defined' (text input field), '* Value' (text input field), and '* Contact' (text input field with a purple icon and the name 'Walle Louise'). At the bottom right, there are 'Cancel' and 'Save' buttons.

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

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

To Enter Expenses

Select **New** to add an expense, or click on the **Expense ID** link to edit using the pencils. Expenses have a sub-type. For example, an expense type is housing, then Sub-Type can be rent.



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

- * Monthly Expense Info. completed for:** Client
- * Expense Type:** Housing
- * Sub Type:** Rent (highlighted with a red box)
- * Monthly Amount:** 500.00
- * Contact:** Janetta Q Shields

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

To Delete Financial Information

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

Incomes

Assets

Expenses

Incomes (5)

New

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

Showing 1 of 1 Page(s)

<< First

< Previous

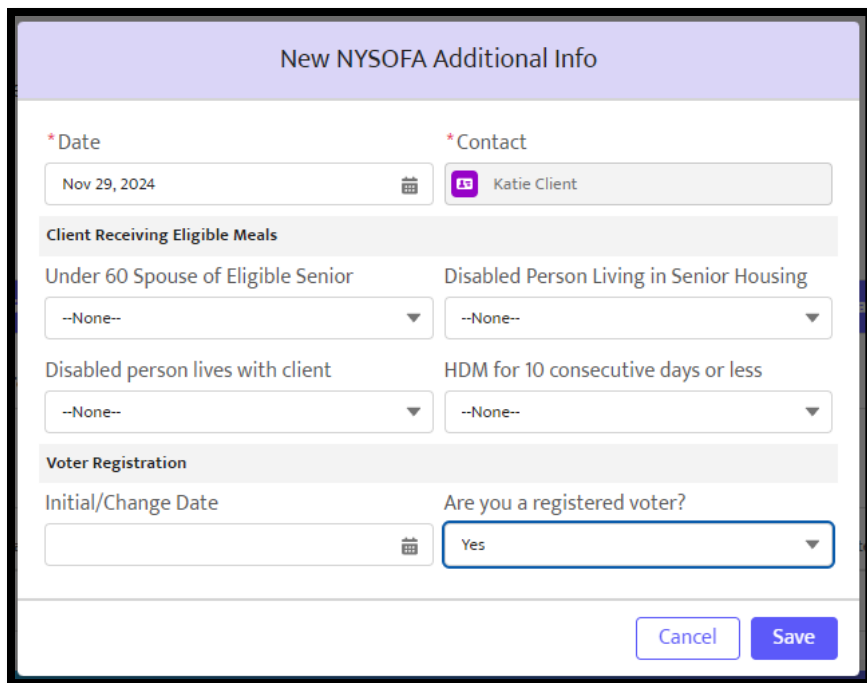
Next >

Last >>

Total Records: 5

Sub-Details: NYSOFA Additional Information

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



New NYSOFA Additional Info

*Date: Nov 29, 2024 *Contact: Katie Client

Client Receiving Eligible Meals

Under 60 Spouse of Eligible Senior: --None-- Disabled Person Living in Senior Housing: --None--

Disabled person lives with client: --None-- HDM for 10 consecutive days or less: --None--

Voter Registration

Initial/Change Date: Are you a registered voter?: Yes

Cancel Save

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

General Comments Tab

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

New Comment

Note: This comment will be accessible to users of all programs.

Title

Client has a service dog

Comments

Client is legally blind and travels with a service dog named Buddy. Please do not try to pet the dog.

102 / 10000 characters

Cancel Save

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.

From To Filter

Comments (2) New Comment Print Comments

Event Date	Subject	Entered by	Comments
1 01/21/2025	Client has a service dog	David Dring	Client is legally blind and travels with a service dog ...
2 12/16/2024	Enter from side of the house	David Dring	The stairs to the front door need repair

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

Program History Tab

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

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

Profile Update History Tab

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

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


Inactivating a Client

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

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

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

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

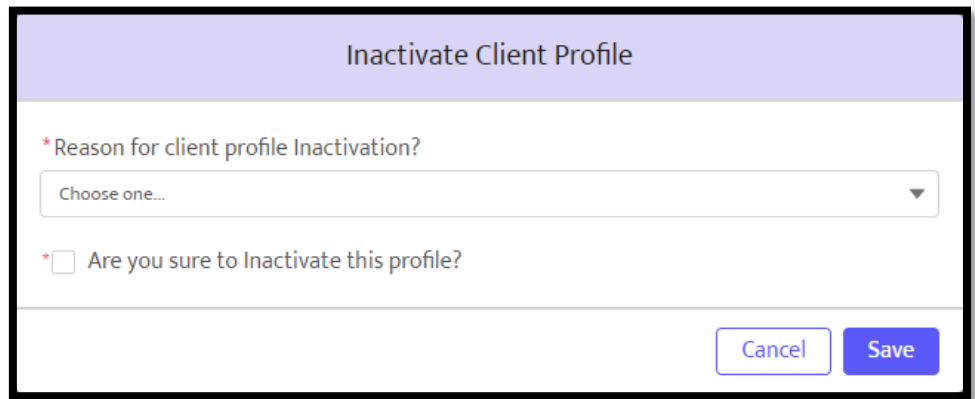
 <p>Upload Picture</p>	<p>Name Janetta Q Shields</p> <p>ID 0000000103</p> <p>Status Active</p> <p>Contact Type Client</p>	<p>Inactivate Client Profile</p>
<p>Details Consents Contacts General Comments Referrals Enrollments Documents Program History Profile Update History</p>		

VIVÉ Knowledge Base – Client Profile

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

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

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

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

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 Enrollments Reference Guide

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

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

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

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

Overview of Enrollments

Enrollments is the secondary level for client data entry in VIVÉ. This level provides the ability to register the client with your specific program. **Enrollments** enable access to essential database features, including intake and various assessment forms, contact and document management, case notes, unit entry, waiting list management, and other key data entry tasks on the **Enrollment Details**

Menu bar. Additional features available at this level include **Approve, Reject, Assign Worker, On Hold** and **Closing Enrollment**.

Navigating Enrollments

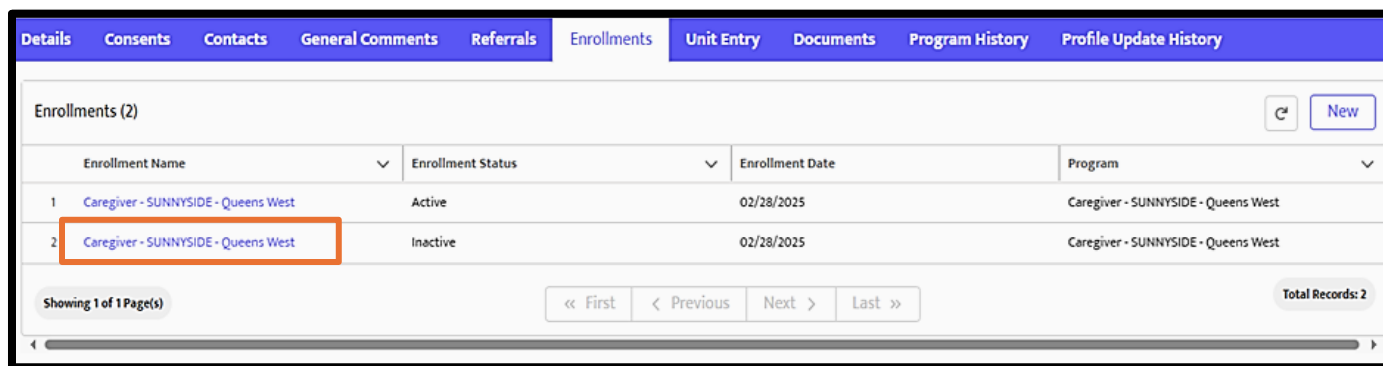
The **Enrollment** menu contains various tabs providing access to capture information about the client and track the work done on their behalf. The default tab on the menu bar will be **Enrollment Details**. Depending on the program type, the status of an enrollment will either default to **Active**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

Determining Client Enrollment

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

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

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



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

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

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

Enrollment
 Older Adult Center - BAY RIDGE - Life Long

[Assign Worker](#)
[On Hold](#)
[Closing Enrollment](#)

Contact

Assigned To

[test-joe client](#)

Karyn Velez

[Enrollment Details](#)
[Forms](#)
[Event Signup](#)
[Case Notes](#)
[Unit Entry](#)
[Follow up](#)
[Contacts](#)
[Documents](#)
[Status History](#)

Enrollment Information

Enrollment Name

Older Adult Center - BAY RIDGE - Life Long

Enrollment Status

Active

Creating Enrollments

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

Enrollment
 Caregiver - SUNNYSIDE - Queens West

[Assign Worker](#)
[On Hold](#)
[Closing Enrollment](#)

Contact

Assigned To

[Maybel Mayweather](#)

[Enrollment Details](#)
[Forms](#)
[Assessments](#)
[Event Signup](#)
[Case Notes](#)
[Unit Entry](#)
[Follow up](#)
[Contacts](#)
[Documents](#)
[Status History](#)

Enrollment Information

Enrollment Name

Caregiver - SUNNYSIDE - Queens West

Enrollment Status

Active

Enrollment Date

2/19/2025

Program

Caregiver - SUNNYSIDE - Queens West

Referral Information

Linked Referral

Referring Agency Name

Referring Worker Name

On Hold Details

On Hold Start Date

On Hold End Date

On Hold Comments

Enrollment Closing Details

Closing Date

Closing Code

Closing Reason

System Information

Created By

Jamie L Foronda

Last Modified By

Jamie L Foronda

Created Date

2/19/2025, 1:26 PM

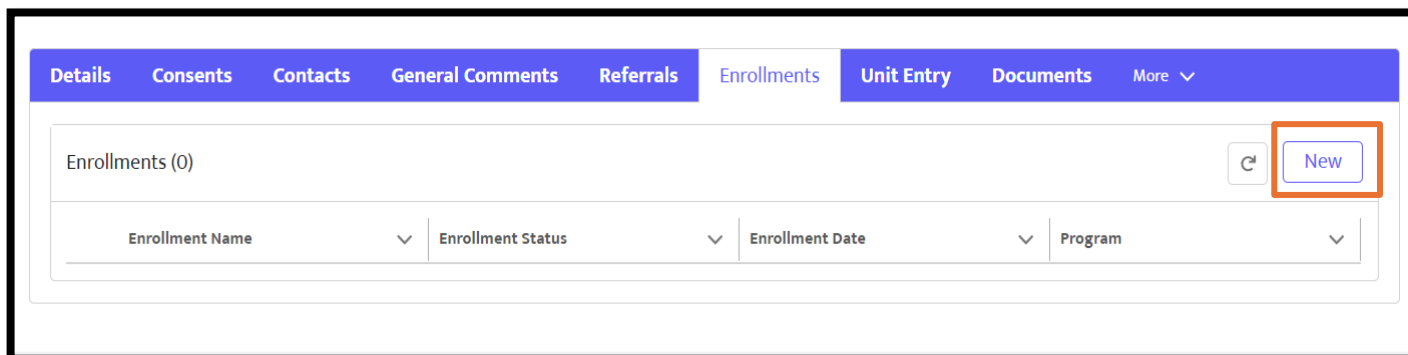
Last Modified Date

2/19/2025, 1:26 PM

[Exit](#)

Creating a new client enrollment

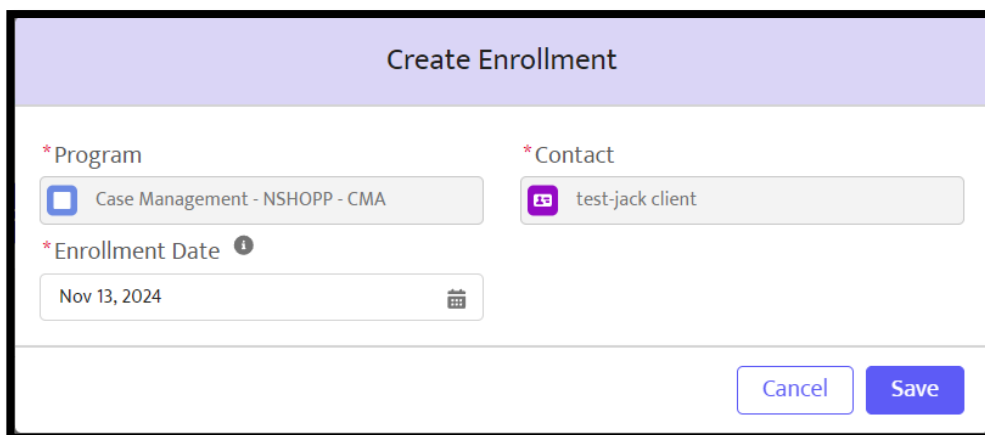
Step 1: Select **New** in the **Enrollments** section and the **Create Enrollment** pop-up will appear. The form will be pre-populated with the program and client's name. These fields are greyed out and cannot be edited.



The screenshot shows the 'Enrollments' section of the VIVÉ system. The top navigation bar has tabs for 'Details', 'Consents', 'Contacts', 'General Comments', 'Referrals', 'Enrollments', 'Unit Entry', 'Documents', and 'More'. The 'Enrollments' tab is selected. Below the navigation bar, there is a section titled 'Enrollments (0)' with a refresh icon and a 'New' button highlighted with a red box. Below this, there is a table with columns for 'Enrollment Name', 'Enrollment Status', 'Enrollment Date', and 'Program', each with a dropdown arrow.

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 screenshot shows the 'Create Enrollment' pop-up form. The form has a purple header with the title 'Create Enrollment'. It contains three main fields: '*Program' with a dropdown menu showing 'Case Management - NSHOPP - CMA', '*Contact' with a dropdown menu showing 'test-jack client', and '*Enrollment Date' with a calendar icon and the date 'Nov 13, 2024'. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

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

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

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

Enrollment Status In Review

Enrollment
Case Management - NSHOPP - CMA

Contact
testjack.client

Assigned To

Assign Worker

Approve

Reject

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

Enrollment Information

Enrollment Name
Case Management - NSHOPP - CMA

Enrollment Status
In Review

Enrollment Date
11/13/2024

Program
Case Management - NSHOPP - CMA

Referral Information

Linked Referral

Referring Agency Name

Referring Worker Name

On Hold Details

On Hold Start Date

On Hold End Date

On Hold Comments

Enrollment Closing Details

Closing Date

Closing Code

Closing Reason

System Information

Created By
Karyn Velez

Last Modified By
Karyn Velez

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

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

Exit

Enrollment Details Menu

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

Common features include:

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

Program specific features include:

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

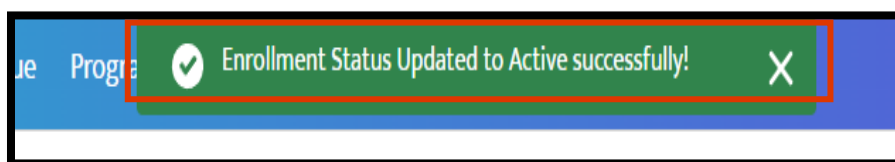
Enrollment: Additional Features

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

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

Approve a Client Enrollment

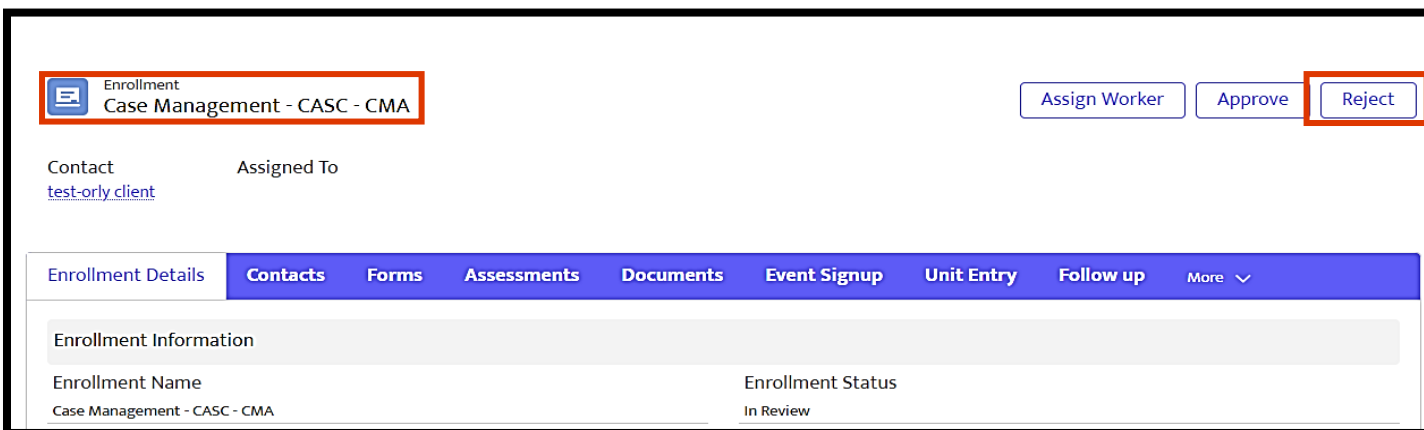
Programs who must **Approve** clients before the status of their enrollment can be updated from **In Review** to **Active** will see the **Approve** button displayed on the **Enrollment** screen. Once the **Approve** button is selected, a notification of successful activation will display. (See *below*)



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

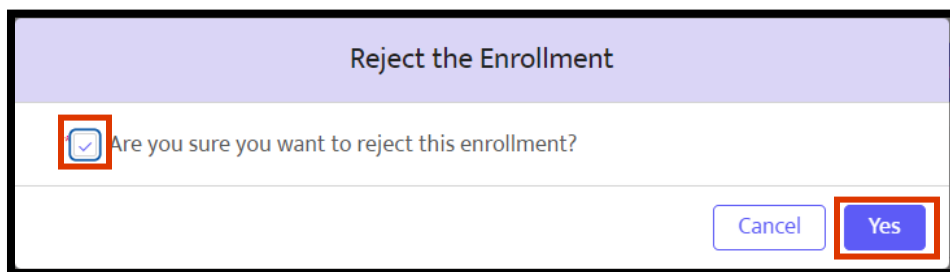
Reject Client Enrollment

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



The screenshot shows the 'Enrollment Details' screen for 'Case Management - CASC - CMA'. The 'Enrollment Status' is 'In Review'. The 'Reject' button is highlighted with a red box. The 'Assign Worker' and 'Approve' buttons are also visible. The 'Contact' is 'test-only client' and the 'Assigned To' is blank. The 'Enrollment Information' section shows 'Enrollment Name' as 'Case Management - CASC - CMA' and 'Enrollment Status' as 'In Review'.

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



The screenshot shows the 'Reject the Enrollment' pop-up dialog. It contains a checkbox labeled 'Are you sure you want to reject this enrollment?' which is checked. The 'Cancel' and 'Yes' buttons are at the bottom right, with the 'Yes' button highlighted by a red box.

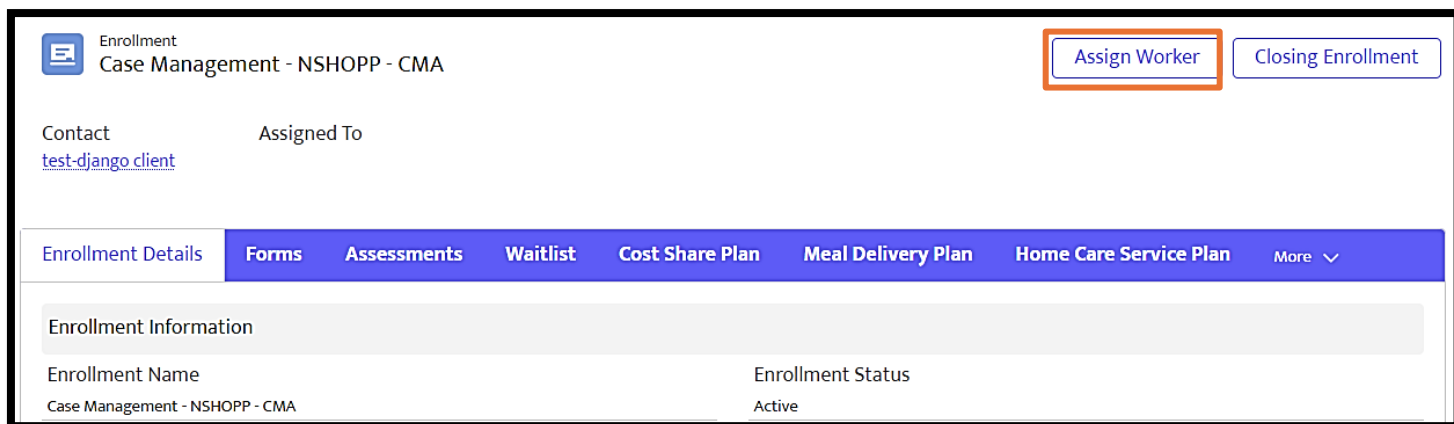
Step 3: Select **Yes**. The **Enrollment Status** will be set to **Inactive** on the **Enrollment Details** page.

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

Assign Worker

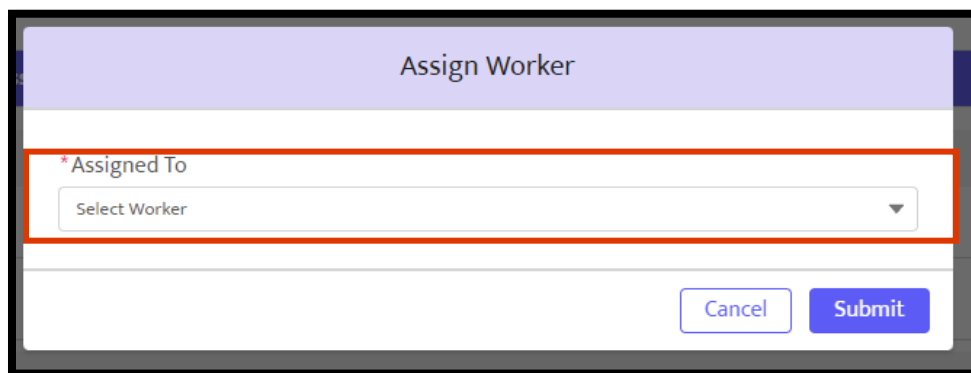
On the **Enrollment Details** screen, the **Assigned To** field will be left blank until a worker is assigned to the client enrollment.

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



The screenshot shows the 'Enrollment Details' screen for 'Case Management - NSHOPP - CMA'. At the top right, there are two buttons: 'Assign Worker' (highlighted with an orange border) and 'Closing Enrollment'. Below the header, the 'Assigned To' field is currently blank. A navigation bar at the bottom contains tabs for 'Enrollment Details', 'Forms', 'Assessments', 'Waitlist', 'Cost Share Plan', 'Meal Delivery Plan', 'Home Care Service Plan', and 'More'. The 'Enrollment Information' section at the bottom shows the enrollment name as 'Case Management - NSHOPP - CMA' and the status as 'Active'.

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



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

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

My Enrollments in Dashboard

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

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

Refresh

My Enrollments

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

View Report (My Enrollments)

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

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

Notifications [Mark all as read](#)

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

Place an Enrollment On Hold

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

Enrollment
Older Adult Center - BAY RIDGE - Life Long

Assign Worker **On Hold** Closing Enrollment

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

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

Enrollment Information

Enrollment Name
Older Adult Center - BAY RIDGE - Life Long

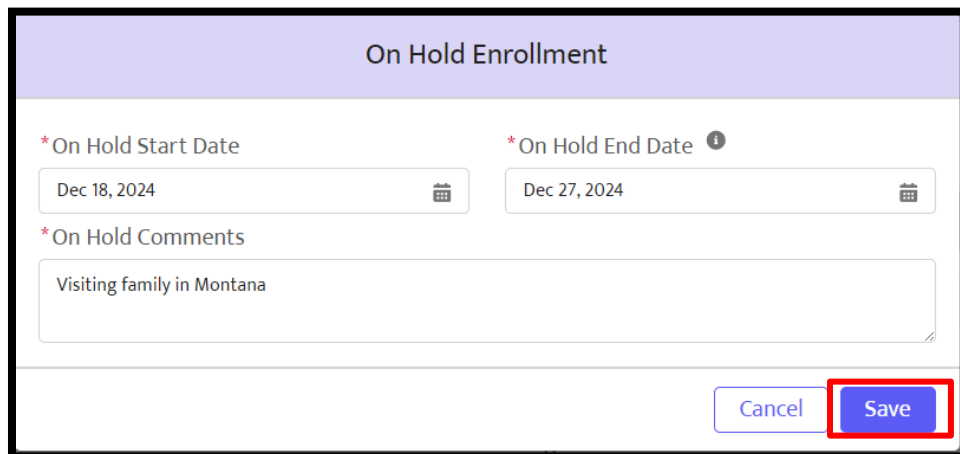
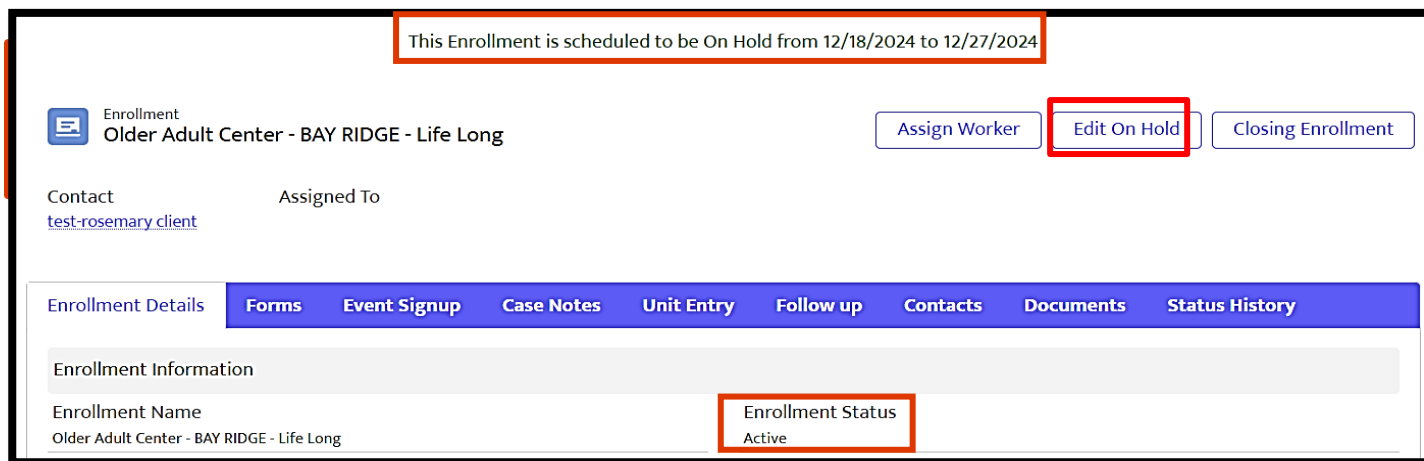
Enrollment Status
Active

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

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

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

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

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

Closing Enrollment

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

Enrollment Case Management - NSHOPP - CMA

Assign Worker Closing Enrollment

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

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

Enrollment Information

Enrollment Name	Enrollment Status
Case Management - NSHOPP - CMA	Active

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

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

Closing an Enrollment: Past date

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

Closing Enrollment

* Closing Date

* Closing Code

* Closing Reason

Cancel Save

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

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

This Enrollment was marked Inactive on 12/26/2024

Enrollment
Case Management - NSHOPP - CMA

Assign Worker

Contact
test-helen client

Assigned To

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

Enrollment Information

Enrollment Name
Case Management - NSHOPP - CMA

Enrollment Status
Inactive

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

Upload Picture

Name
test-helen client

Inactivate Client Profile

ID
0999001639

Status
Active

Contact Type
Client

Details Consents Contacts General Comments Referrals Enrollments Unit Entry Program History More ▾

Program History (3)

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

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

Closing Enrollment: Future Date

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

VIVÉ Knowledge Base – Enrollments

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

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

Enrollment
Case Management - NSHOPP - CMA

Assign Worker Edit Enrollment Closure

Contact Assigned To
[test-joy.client](#) Karyn Velez

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

Enrollment Information

Enrollment Name Enrollment Status
Case Management - NSHOPP - CMA Active

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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

[Return to VIVÉ Knowledge Base](#)

VIVÉ Events Reference Guide

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

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

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

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

In this guide you will learn:

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

Creating Events

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

The screenshot shows the top navigation bar with the following tabs: Event Profile, Activity Tracker, Blank Forms, Monthly Unit Summary, Survey Invitation Links, Client Notifications, and More. Below the tabs, there is a section for 'Active Event (19)' with a table of event filters. The 'New Event Profile' button is highlighted with an orange box.

Event Name	Host Type	Event Type	Unit Type	Event Start Date	Event End Date

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

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

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

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

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

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

Signing up Clients for an Event

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

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

Signing up & Removing Clients via Event Profile

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

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

The screenshot shows the VIVÉ application interface. The top navigation bar includes 'Client Search', 'Referral Queue', 'Program Tools' (highlighted with an orange box), 'Admin Tools', and 'Reports'. Below this, a sub-header indicates the user is logged in as 'Janice Farmer' and working in the 'Older Adult Center - BAY RIDGE - Life Long' program. The main content area features a tabbed interface with 'Event Profile' selected. Under the 'Event Profile' tab, there is a list of active events. The first event, 'Balance Class FY24', is highlighted with an orange box. The table lists event details such as Event Name, Host Type, Event Type, Unit Type, Event Start Date, and Event End Date.

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

Step 3: Click **Event Signup**.

The screenshot shows the 'Event Profile' page for 'Balance Class FY24'. The 'Details' tab is selected, and the 'Event Signup' sub-tab is highlighted with an orange box. The page displays event information: Host Type (In-Person and Virtual), Event Type (Units by Client), Unit Type (Participant), Start Date (7/1/2023), and End Date (6/30/2034). Below this, there is a table for 'Active Event Signup'. The table has columns for Client Name, Enrollment Start Date, Enrollment Status, Event Signup Date, Event Signup End Date, and Signup Status. Three clients are listed: Alberto Columbiani, Alex Morgan, and Alistar Cook, all with 'Active' status. To the right of the table, there are two buttons: 'Scan QR Code' and 'Edit' (highlighted with an orange box).

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

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

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

Details

Event Signup

Unit Entry

Active Event Signup

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

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

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

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

Remove Client via Event Profile

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

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

Sign up & Removing Clients via Enrollment Details Menu

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

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

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

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

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

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

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

Removing Client via Enrollment Details

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

Signing Up Client via QR Code Scan

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

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

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

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

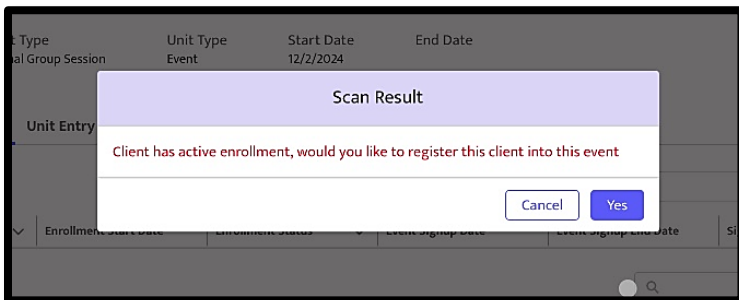
Step 3: Click **Event Signup** link. Then select **Scan QR Code** button. ([More information on QR Code Scanning](#))

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

VIVÉ Knowledge Base – Events

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

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



Event Unit Entry

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

There are three ways to add units to an event:

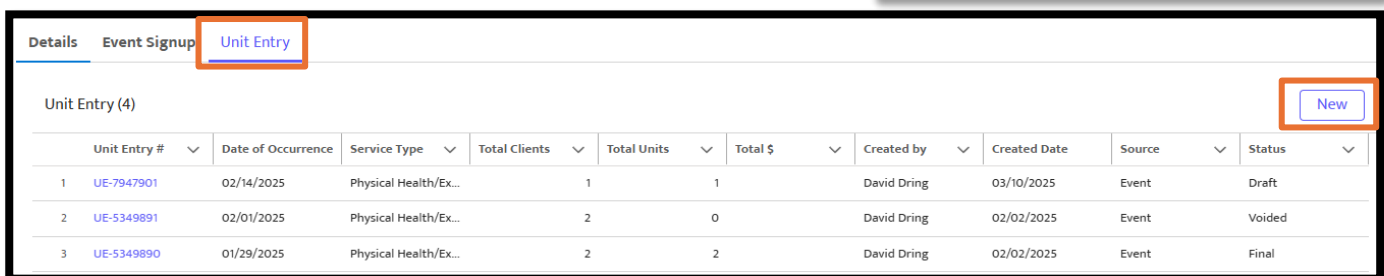
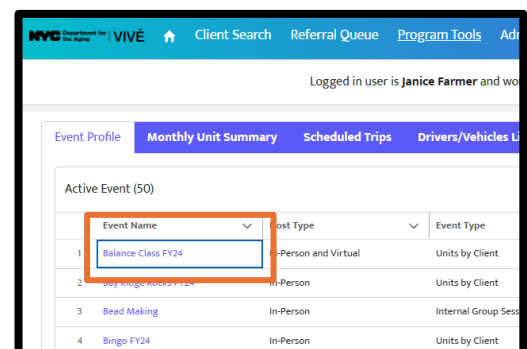
- Entering units from the **Events Profile** (good for entering units quickly for multiple clients).
- Entering a unit for a client from the **Enrollment Details** Menu.
- By using the **Scan QR Code** feature (most accurate way to enter units).

Entering Units from the Events Profile

First, create a unit entry.

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

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



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

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

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

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

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

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

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

Editing an Existing Unit Entry

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

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

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

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

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

Enter Units By Scanning QR Codes

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

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

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

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

Unit Entry (5)											
	Unit Entry #	Date of Occurrence	Service Type	Total Clients	Total Units	Total \$	Created by	Created Date	Source	Status	
1	UE-7947902	03/10/2025	Physical Health/Ex...	2	2	\$0.00	David Dring	03/10/2025	Event	Draft	
2	UE-7947901	02/14/2025	Physical Health/Ex...	1	1		David Dring	03/10/2025	Event	Draft	

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

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

Unit Entry

Event Details

Event Profile: Balance Class FY24

Event Location:

Fee Amount: \$0.00

Event Type: Units by Client

Unit Type: Participant

Event Manager:

Unit Entry Details

*Date of Occurrence: Mar 10, 2025

*Status: Draft

Total Units: 2.00

Total \$: 0.00

Filter & Auto Fill

Name:

Funding Source: --None--

Units: 0

Amount: 0

Select all Attended? ☐

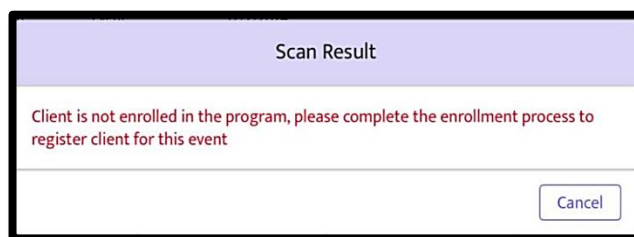
Step 6: A windowpane appears showing the image from the back facing camera. Maneuver the camera so that the member's ID card is clearly within the windowpane.



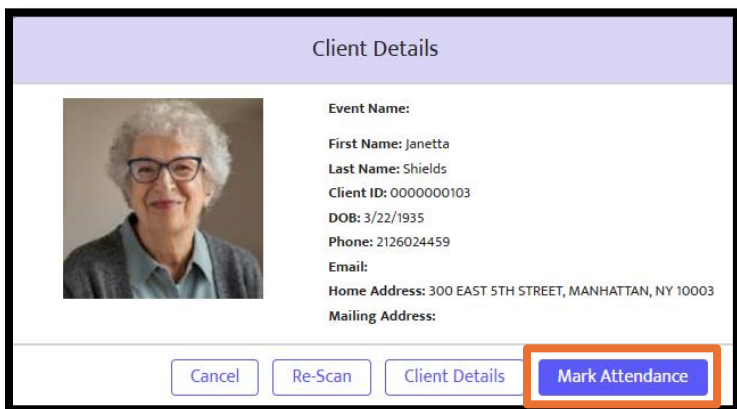
Step 5: If the client's QR Code is recognized, a confirmation pop-up will appear. From this pop-up you can Cancel, Rescan, view the client's details or Mark Attendance.

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

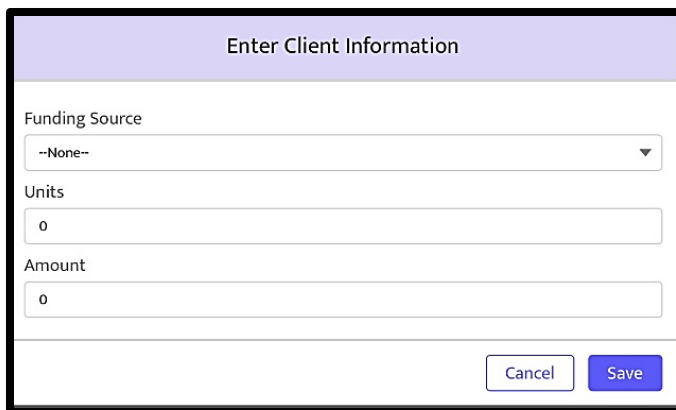
If the Client's QR Code is not recognized because the client is not enrolled in the program, a pop-up will appear telling the user to complete the enrollment process.



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



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



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

Entering Anonymous Units for Events

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

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

Entering Anonymous Information & Referral Units

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

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

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

Step 4: Select the New button.

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

Unit Entry

Event Details

Event Profile

I&R - HEAP

Event Location

15 BAY RIDGE AVENUE, BROOKLYN, NY 11209

Fee Amount

Event Type

Units by Client

Unit Type

Contact

Event Manager

Unit Entry Details

* Date of Occurrence

Mar 16, 2025

Total Units

Anonymous Units

* Status

Draft

Total \$

Entering Anonymous Meal Units

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

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

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

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

Step 4: Select the New button.

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

NOTE: There are no anonymous clients allowed.

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

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

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

Monthly Unit Summary

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

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

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

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

Monthly Unit Summary (5) New

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

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

Monthly Unit Summary

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

*Status: Draft

*Month: March

*Year: 2025

Total Cost Center Amount

Calculate Units

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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

[Return to VIVÉ Knowledge Base](#)

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**
 - Create a Follow Up Request:
- **Receive a Follow Up Request**
- **Edit a Follow Up Request**

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**.

VIVÉ Knowledge Base – Follow Up

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

Enrollments (1) New

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

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

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

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

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

Follow up Requests (1) New Follow up Request

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

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

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

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

Follow-Up Request

* Assigned To
Karyn Velez

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

* Subject
Benefits and Entitlements Questions

Reason
Clarification on Medicaid and SCRIE are requested.

Cancel Submit

Receive a Follow Up Request

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

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

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

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

Edit a Follow Up Request

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

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

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

Enrollment Details	Contacts	Forms	Assessments	Documents	Event Signup	Unit Entry	Follow up	More ▾
Follow up Requests (1)							New Follow up Request	
Subject ▾	Assigned To ▾	Follow-Up Date	Status ▾	Reason ▾	Created Date	Created By ID ▾		
Benefits and Entitle...	Karyn Velez	12/06/2024	Open	Clarification on Medi...	12/05/2024	Karyn Velez		
Showing 1 of 1 Page(s)							Total Records: 1	

VIVÉ Knowledge Base – Follow Up

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

Follow up Request
Benefits and Entitlements Questions

Follow-Up Date
12/6/2024, 1:30 PM

Assigned To
Karyn Velez

Subject
Benefits and Entitlements Questions

Enrollment
[Case Management - NSHOPP - CMA](#)

Client Name
test-maxine client

Status
Open

Reason
Clarification on Medicaid and SCRIE are requested.

Created By
Karyn Velez

Last Modified By
Karyn Velez

Edit Assigned To

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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

[Return to VIVÉ Knowledge Base](#)

The VIVÉ Unit Entry Reference Guide

VIVÉ is a customized client management system designed by NYC Aging. This system supports NYC Aging contractors in managing their client interactions and reporting on services provided. This reference guide provides instructions on creating, voiding, and other features of **Unit Entry**.

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

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

In this guide you will learn:

- **Overview of Unit Entry**
- **Editing Existing Units from Details Menu**
- **Entering Units via the Details Menu**
- **Entering Units from the Enrollment Details Menu**
- **Editing Units from Enrollment Details Menu**
- **Entering Units from Program Tools**
- **Editing an Existing Unit Entry via Program Tools**
- **Entering Units by QR Code Scanning**
- **Anonymous Unit Entry**
- **Voiding a Unit**
- **Monthly Unit Summary**

Overview of Unit Entry

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

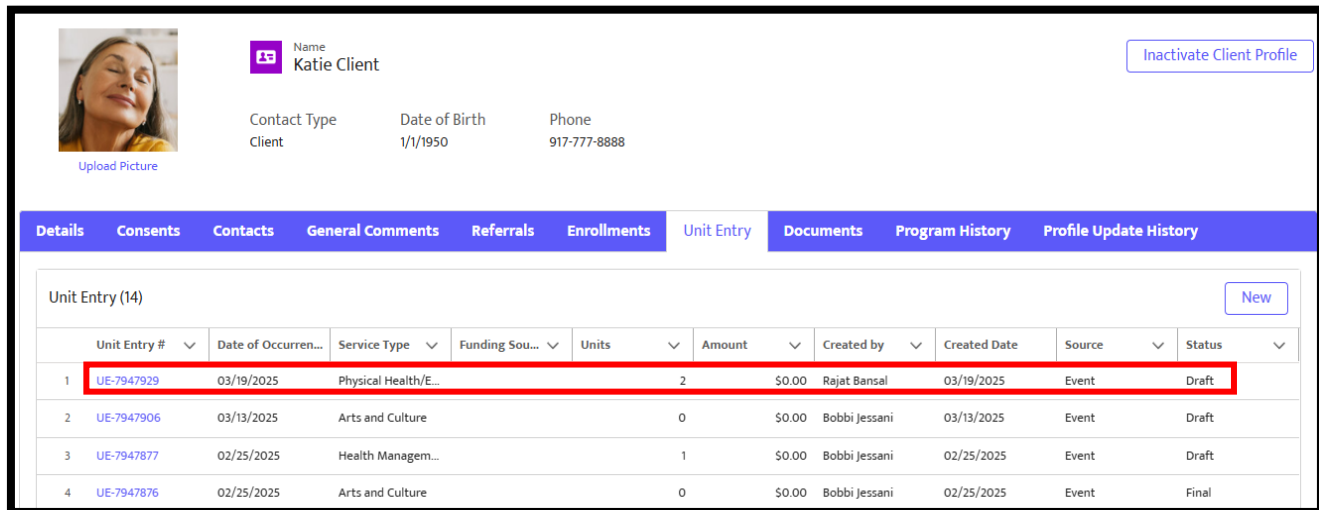
You can enter units in VIVÉ in three places: **Details Menu**, **Enrollment Menu**, or **Program Tools**. For more information on [Events](#).

Editing Existing Units from Details Menu

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

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

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



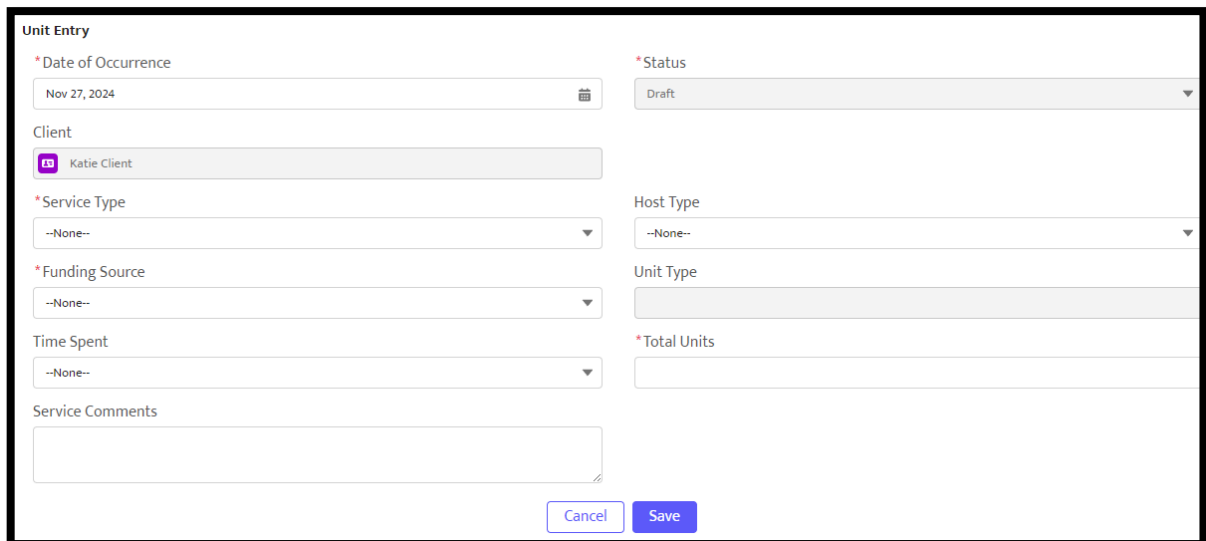
Client Profile: Katie Client

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

Unit Entry (14)

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

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



Unit Entry

* Date of Occurrence: Nov 27, 2024

* Status: Draft

Client: Katie Client

* Service Type: --None--

* Funding Source: --None--

Host Type: --None--

Unit Type:

Time Spent: --None--

* Total Units:

Service Comments:

Cancel Save

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

Entering Units via the Details Menu

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

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

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

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

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

Unit Entry

* Date of Occurrence: Mar 22, 2025

* Status: Draft

Client: Katie Client

* Service Type: Information & Referral

Host Type: --None--

* Funding Source: NYC Aging Funded Service

Unit Type: Contact

Time Spent: 60 min

* Total Units: 1.00

Service Comments:

Cancel Save

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

Entering Units from the Enrollment Details Menu

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

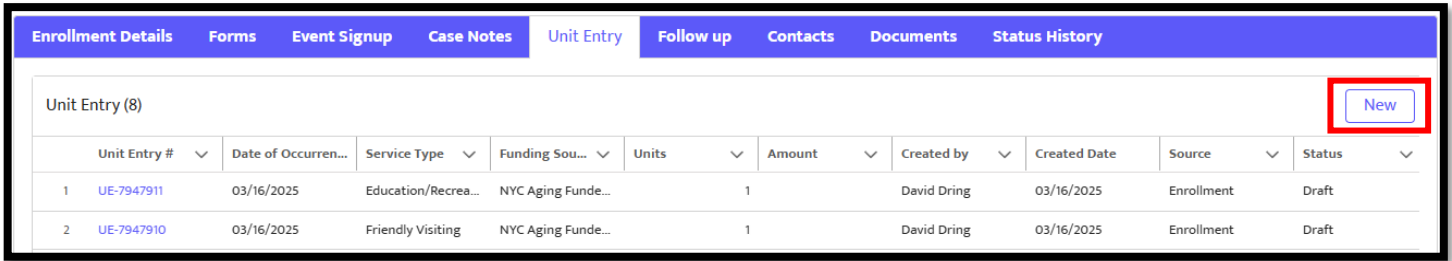
Step 1: From the **Top Menu**, click **Client Search**, and click desired client's name.

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

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

VIVÉ Knowledge Base – Unit Entry

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



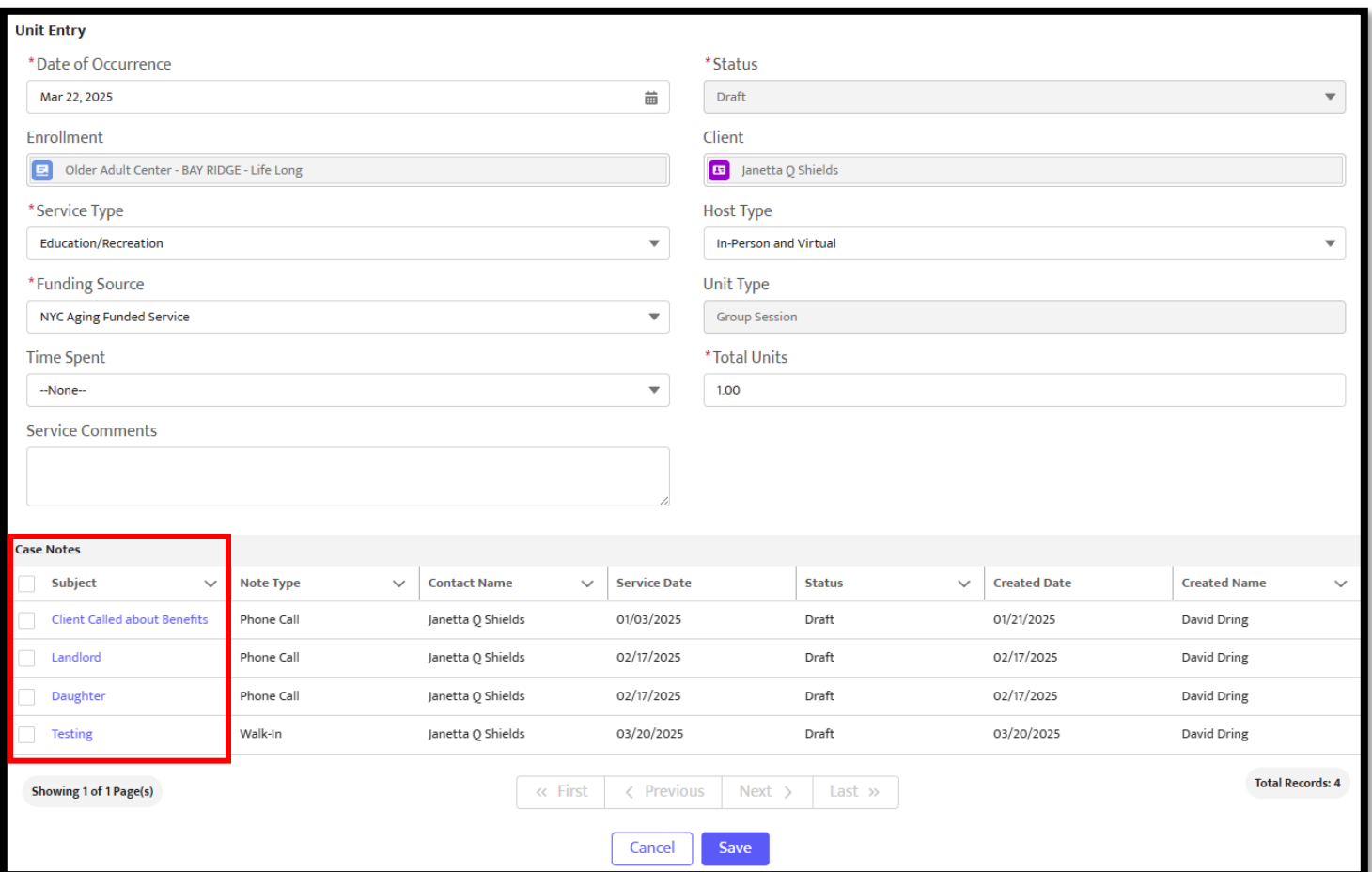
The screenshot shows the 'Unit Entry' tab selected in a navigation bar. Below the navigation bar, there is a table titled 'Unit Entry (8)'. The table has columns for Unit Entry #, Date of Occurrence, Service Type, Funding Source, Units, Amount, Created by, Created Date, Source, and Status. Two entries are visible, both created by David Dring on 03/16/2025. A 'New' button is highlighted in a red box in the top right corner of the table area.

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

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

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

Step 7: Select **Save**.



The screenshot shows the 'Unit Entry' details form. The form includes fields for Date of Occurrence (Mar 22, 2025), Status (Draft), Enrollment (Older Adult Center - BAY RIDGE - Life Long), Client (Janetta Q Shields), Service Type (Education/Recreation), Host Type (In-Person and Virtual), Funding Source (NYC Aging Funded Service), Unit Type (Group Session), Time Spent (--None--), and Total Units (1.00). There is a Service Comments text area. Below the form is a 'Case Notes' section with a table of existing case notes. The 'Case Notes' section is highlighted with a red box. At the bottom, there are 'Cancel' and 'Save' buttons.

Case Notes

<input type="checkbox"/> Subject	Note Type	Contact Name	Service Date	Status	Created Date	Created Name
<input type="checkbox"/> Client Called about Benefits	Phone Call	Janetta Q Shields	01/03/2025	Draft	01/21/2025	David Dring
<input type="checkbox"/> Landlord	Phone Call	Janetta Q Shields	02/17/2025	Draft	02/17/2025	David Dring
<input type="checkbox"/> Daughter	Phone Call	Janetta Q Shields	02/17/2025	Draft	02/17/2025	David Dring
<input type="checkbox"/> Testing	Walk-In	Janetta Q Shields	03/20/2025	Draft	03/20/2025	David Dring

Showing 1 of 1 Page(s) << First < Previous Next > Last >> Total Records: 4

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

Editing Units from Enrollment Details Menu

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

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

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

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

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

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

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

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

Unit Entry

*Date of Occurrence

Mar 16, 2025

*Status

Draft

Enrollment

Older Adult Center - BAY RIDGE - Life Long

*Service Type

Education/Recreation

*Funding Source

NYC Aging Funded Service

Time Spent

--None--

Service Comments

Client

Janetta Q Shields

Host Type

--None--

Unit Type

Group Session

*Total Units

1.00

Case Notes

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

Entering Units from Program Tools

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

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

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

Step 3: Click a Event Name link.

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

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

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

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

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

Details | Event Signup | [Unit Entry](#)

Unit Entry (4) [New](#)

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

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

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

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

Unit Entry

Event Details

Event Profile: [Balance Class FY24](#)

Event Location:

Fee Amount: \$0.00

Unit Entry Details

* Date of Occurrence:

Total Units: 2.00

Filter & Auto Fill

Name: [Filter](#)

Funding Source: --None-- Units: 0 Amount: 0 [Auto Fill](#)

Select all Attended? ☐ [Scan QR Code](#)

Client List

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

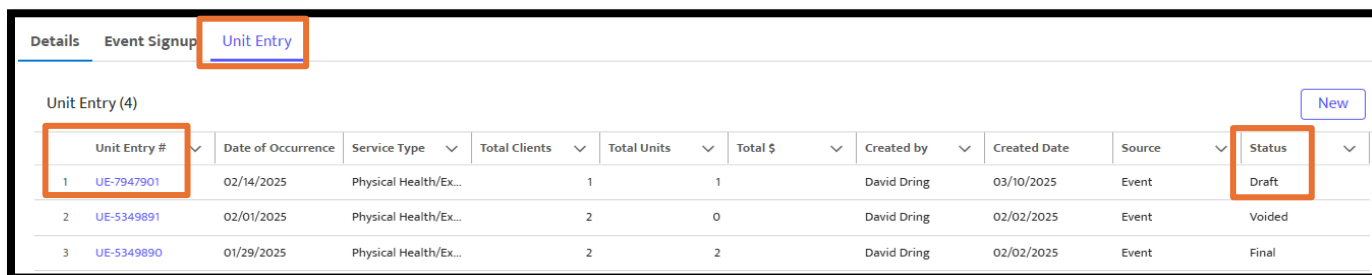
VIVÉ Knowledge Base – Unit Entry

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

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

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

Entering Units by QR Code Scanning

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

Anonymous Unit Entry

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

Voiding a Unit

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

Cancel Void Unit Save

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

Monthly Unit Summary

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

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

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

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

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

Monthly Unit Summary (5)

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

New

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

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

VIVÉ Knowledge Base – Unit Entry

Monthly Unit Summary

*Program

Older Adult Center - BAY RIDGE - Life Long

*Status

Draft

*Month

March

*Year

2025

Total Cost Center Amount

Calculate Units

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

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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

[Return to VIVÉ Knowledge Base](#)

[Return to Knowledge Base](#)

The VIVÉ Contacts Reference Guide

VIVÉ is a client management system designed by NYC Aging. This system supports NYC Aging contractors in managing their client interactions and reporting on services provided. This reference guide provides basic guidance instructions on the use of VIVÉ.

Contacts is a common functionality within VIVÉ. You may access this guide from the VIVÉ Knowledge Base or from a program specific reference guide. At the beginning and end of this document is a link to return to the [VIVÉ Knowledge Base](#).

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

In this guide you will learn:

- **Overview of Contacts**
- **Navigating to Contacts**
 - First Check to See if the Contact Already Exists
 - Associating an Existing Client as Your Contact
 - Associating an Existing Contact
 - Associating an Existing Professional
- **Entering in New Contacts**
 - Entering a New Professional Contact
 - Enter a New Organization
- **Editing Contacts**
- **Inactivating Contacts**

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

Overview of Contacts

The Contact section is designed to keep information about individuals connected to the client. For ease of maintaining this information, **Contacts** is available on both the **Details Menu** and **Enrollment Details Menu**.

Contacts Shared Across Programs

Contacts are a shared resource, accessible across multiple programs. This interconnected approach ensures that client data remains consistent and up to date, fostering improved collaboration and reducing duplication of effort. However, because updates to contact details impact all programs, it's important to carefully review changes to avoid unintended consequences for shared clients.

Types of Contacts

There are three contact types:

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



When you add a contact as the Client type, the relationship is reciprocal—the added client will also have the original client listed as their contact. The information captured varies based on the contact type.

Navigating to Contacts

Contacts are located within the **Details Menu** and the **Enrollment Details Menu**.

Step 1: From the **Details Menu** or **Enrollment Details Menu**, click on the **Contact Tab**. Depending upon the width of your window, there may appear a **More** dropdown menu with additional navigational links.

The screenshot shows two overlapping windows from the VIVÉ system. The top window displays the 'Details Menu' with tabs: Details, Consents, Contacts, General Comments, Referrals, Enrollments, Unit Entry, Documents, Program History, and Profile Update History. The 'Contacts' tab is selected. The bottom window displays the 'Enrollment Details Menu' with tabs: Enrollment Details, Forms, Assessments, Waitlist, Cost Share Plan, Meal Delivery Plan, Home Care Service Plan, Contacts, and More. The 'Contacts' tab is also selected. Below the tabs, a table titled 'Contact Relationship (4)' is visible. The table has columns: Name, Related Contact, Relationship, Caregiver/Care Receiver, and Status. One row is shown with the following data:

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

Associating Contacts with Your Client

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

First Check to See if the Contact Already Exists

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

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

Step 2: After navigating to **Contacts**, select the **New** button.

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

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

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

- From the **Contact Search** pop-up, select **Contact Type** by clicking the radio button next to it.
- Enter any known details about the contact (such as name, birth date, phone number, etc.).

The screenshot shows the 'Contact Search' pop-up form. The 'Contact Type' section has three radio buttons: 'Client', 'Contact' (selected), and 'Professional'. The 'Search' button at the bottom is highlighted with a red box. The form includes fields for First Name, Last Name, Phone, Email, House Number, Street, Borough, City, Apt/Unit, State, ZIP, and Country.

- 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.

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

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

Confirm Selection

If a contact is found via the **Contact** search, mark the selection and confirm it as above. If a contact is not found, check the box to confirm there are no matches then select the **New Contact** button.

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

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

New Contact

Similarly, if a **Professional Contact** is found, mark the selection and confirm it as above. If a professional contact is not found, check the box to confirm there are no matches then select the **New Professional** button.

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

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

New Professional

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

Associating an Existing Client as Your Contact

The information that is captured on a contact depends on the Contact Type. The Client as a contact **New Contact Relationship** pop-up asks questions about both the Contact Relationship to Client and the Client Relationship to Contact.

Step 1: After selecting the **Confirm Selection** button, you must complete the **New Contact Relationship** pop-up.

Step 2: Use the dropdown menus to identify the recipient or receiver of care, primary or other contacts, type and status of relationship. Keep in mind fields preceded by a red asterisk (*) are required. The comments section can be helpful to further describe the relationship.

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.

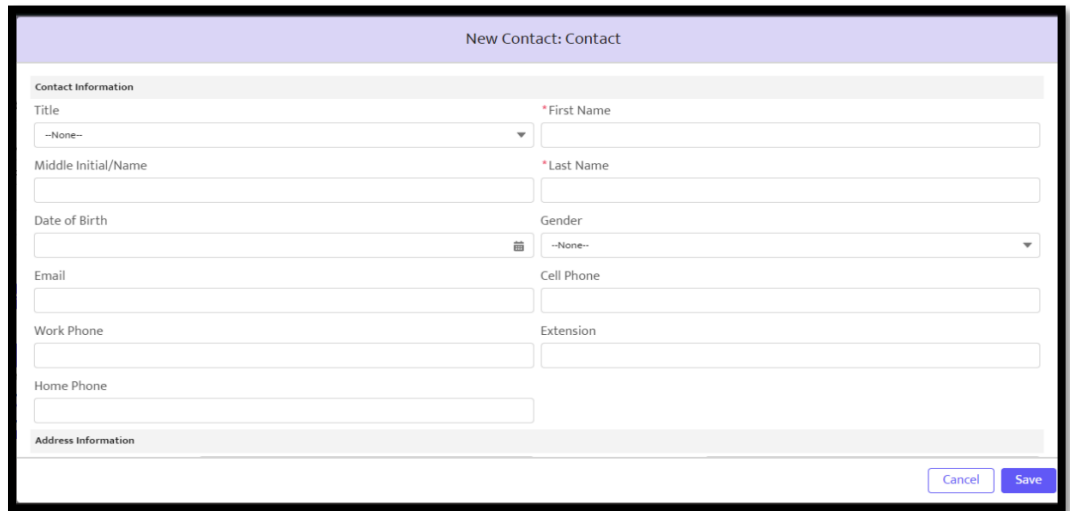
Yes, it can be confusing when talking about a contact type that is contact. We appreciate your understanding.

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

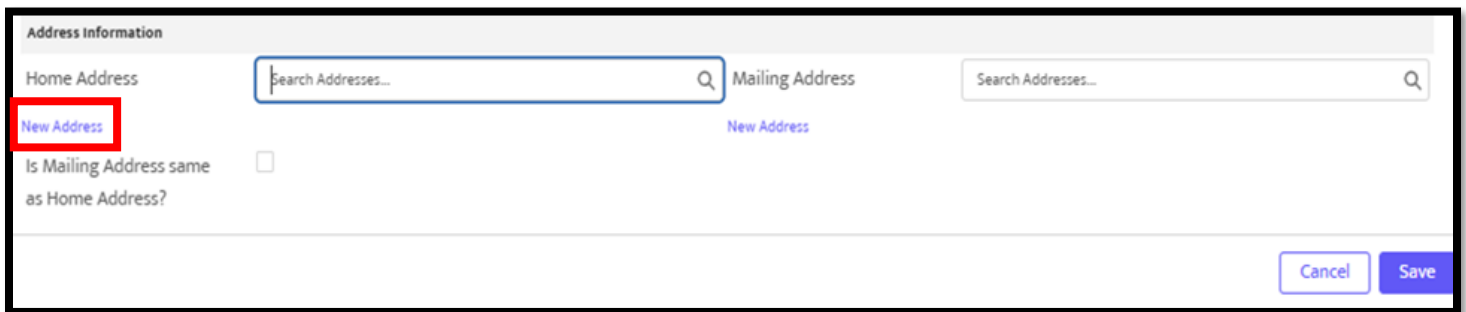
Step 2: While not required, it's best practice to always enter a phone number and an email address.

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**.



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

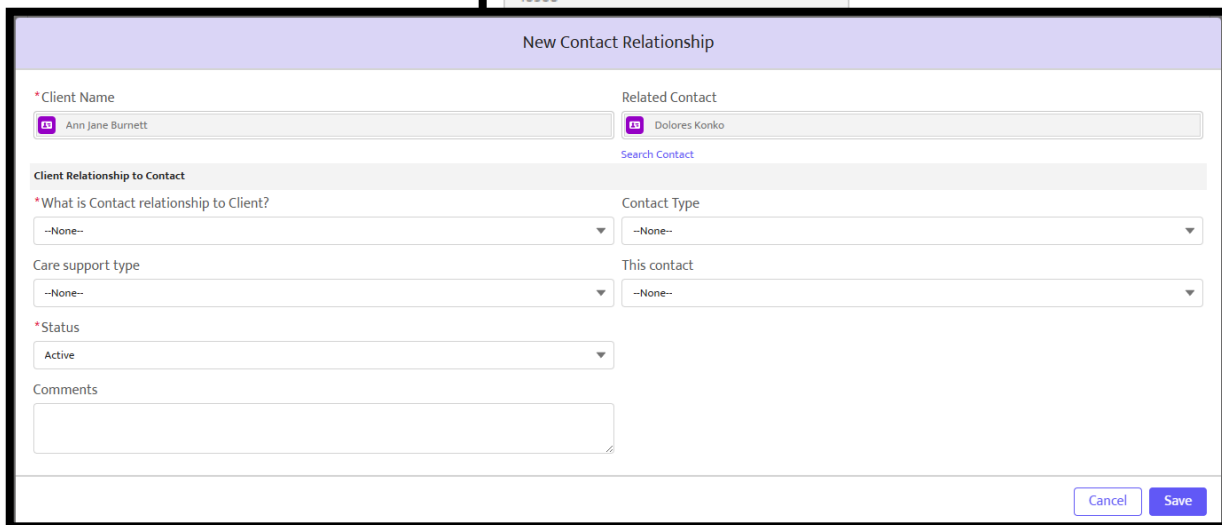
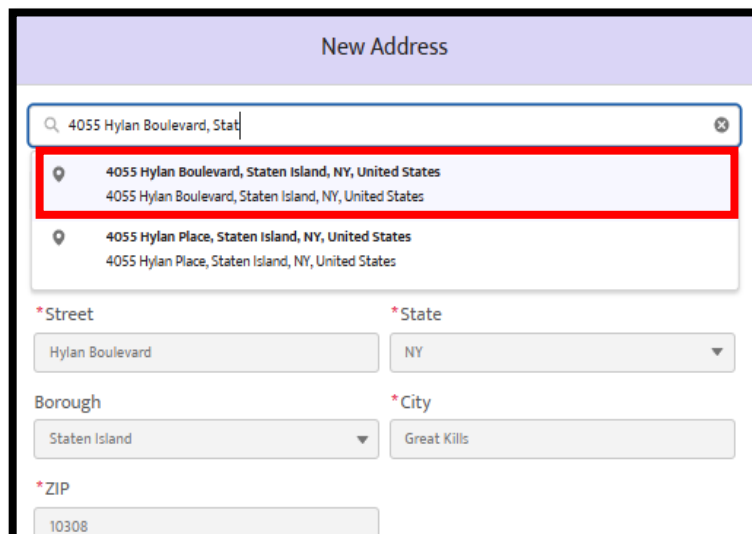


The screenshot shows the "Address Information" section of the form. It includes two search boxes: "Home Address" and "Mailing Address", both with "Search Addresses..." placeholder text and a magnifying glass icon. Below the "Home Address" search box, the text "New Address" is highlighted with a red rectangle. Below the "Mailing Address" search box, the text "New Address" is also visible. There is a checkbox labeled "Is Mailing Address same as Home Address?". At the bottom right are "Cancel" and "Save" buttons.

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

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

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

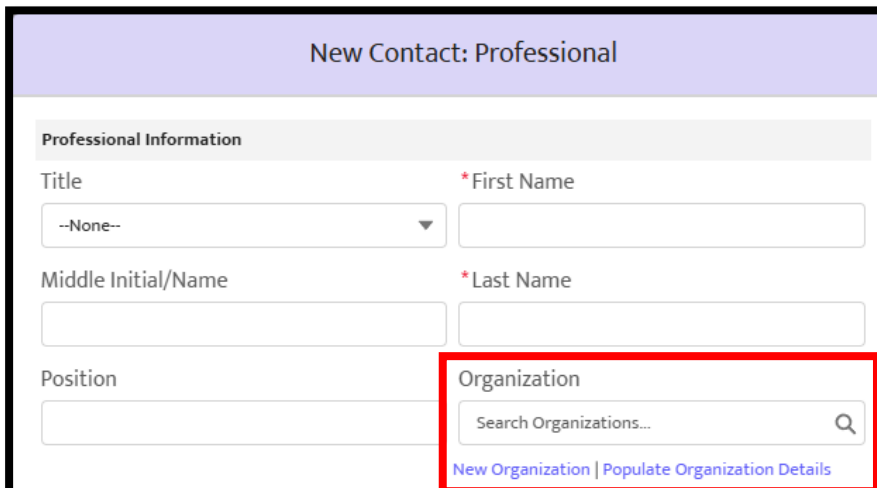


Entering a New Professional Contact

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.

Organization

Walgreens - Tarrytown

New Organization | Populate Organization Details

Enter a New Organization

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

Organization

Search Organizations...

New Organization | Populate Organization Details

Editing Contacts

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

Details	Consents	Contacts	General Comments	Referrals	Enrollments	Unit Entry	Documents	Program History	Profile Update History
Contact Relationship (18)									
Name		Related Contact	Relationship	Caregiver/Care Receiver	Status				
1	CR-278547	Dolores Herbert	Other		Active				
2	CR-267861	Ginger Whitaker	Other	Not Applicable	Active				
3	CR-267860	Allan Whiteman	Brother	Not Applicable	Active				

Step 2: Click on the pencils within the **Contact** details to edit the fields. Once finished select **Save** located at the bottom of the form.

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

Exit

TIP: Only fields that have the pencil or pen to the right of them can be edited. The Contact details display will be different depending on the contact type you are editing.

Inactivating Contacts

Inactivating a contact has the following impact:

- The contact is no longer a valid contact for the associated client. However, if the contact is associated with other clients that status remains the same.
- If the contact was a care receiver, they will no longer be able to be selected during a care receiver type assessment.

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

Step 2: Click on the pencils within the **Contact** details to edit **Status**.

VIVÉ Knowledge Base - Contacts

Information

Name

CR-267861

Client Name

[Ann Jane Burnett](#)

What is Contact relationship to Client?

Other


Care support type

Not Applicable

Comments

This is Ms. Burnett's Cardiologist.

Created By

 [Nancy Nybergh](#), 2/3/2025, 10:31 AM

Status

Active

Related Contact


[Ginger Whitaker](#)

Contact Type

Primary Care Physician

This contact

Last Modified By

 [Nancy Nybergh](#), 2/3/2025, 10:31 AM

Exit

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](#)

VIVÉ Dashboard Reference Guide

VIVÉ is a customized client management system designed by NYC Aging. This system supports NYC Aging contractors in managing their client interactions and reporting on services provided. This reference guide provides instructions on navigating the **Dashboard**.

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

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

In this guide you will learn:

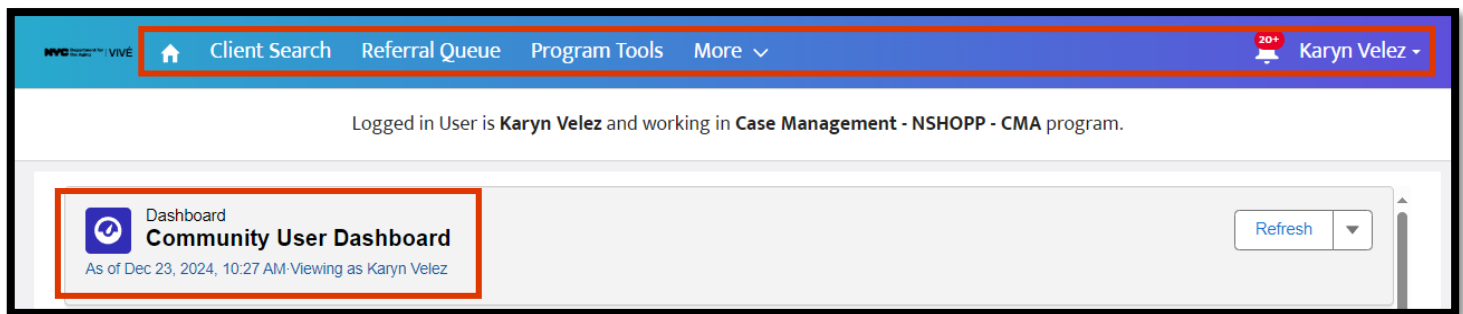
- **A Dashboard Overview**
 - The Top Menu Navigation
 - Notifications
 - User Name Profile
 - Refresh Button
- **My Enrollments**
 - Accessing the Client Profile
 - Accessing Enrollment Menu
- **My Follow-Ups**
 - Accessing the Follow-Up Request Screen
- **My Tasks**
 - Accessing the Task Details

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

A Dashboard Overview

The **Community User Dashboard** or **Dashboard** is your home page. Here you will have access to the **Top Menu**, as well as hyperlinks associated with enrolled clients, pending follow-ups for clients, and tasks that are to be completed.

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



The Top Menu Navigation

The **Top Menu** is displayed on every screen in VIVÉ streamlining access to critical navigational tools.

From any screen within VIVÉ you can return to the **Dashboard** home page by selecting either the **NYC Aging VIVÉ** logo or the **Home** icon.



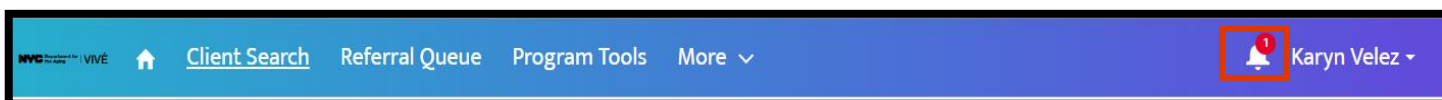
These are the critical links from the **Top Menu**:

- **Client Search** – This functionality conducts a search of clients, contacts or professionals. It includes an intelligent search. For example, it can search nicknames, such as Bob, and return results for Robert.
- **Referral Queue** – This functionality provides access to referrals that are either created, sent, or received by your program
- **Program Tools** – This functionality varies by program. Universally, users are able to access event profiles and the monthly unit summary. Depending upon the program, one or more of the following are available: ability to download blank forms, access links to surveys, print ID cards. manage wait lists for services, and send notifications to enrolled clients via email or text messaging.

- **Admin Tools** – This functionality is only available to Program Administrators who manage users, such as adding new users or making edits to current user details. For certain programs, this functionality will also manage staff who deliver meals.
- **Reports** – This functionality provides users with access to their program specific reports.
- **Field Service** – This functionality is specific to route management of Home Delivered Meals programs.

Notifications

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

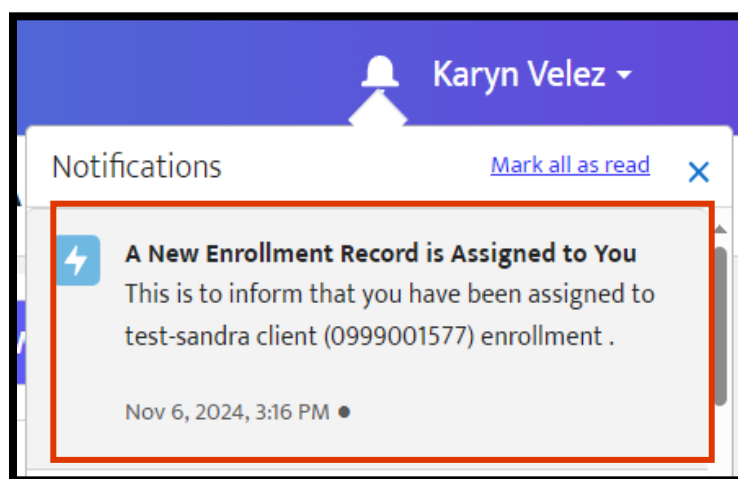


To view and access **Notifications**:

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

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

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



Enrollment
Case Management - NSHOPP - CMA

Contact
[test-sandra client](#)

Assigned To
Karyn Velez

Enrollment Details | Forms | Assessments | Waitlist | Cost Share Plan | Meal Delivery Plan | Home Care Service Plan | Friendly Visit Service

Enrollment Information

Enrollment Name Case Management - NSHOPP - CMA	Enrollment Status Active
Enrollment Date 11/6/2024	Program Case Management - NSHOPP - CMA

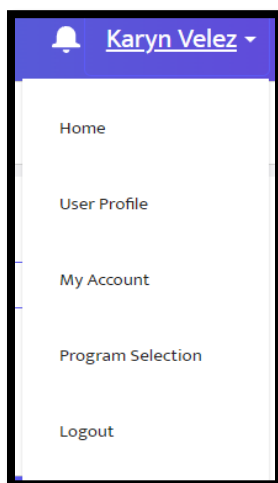
Referral Information

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

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

User Name Profile

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



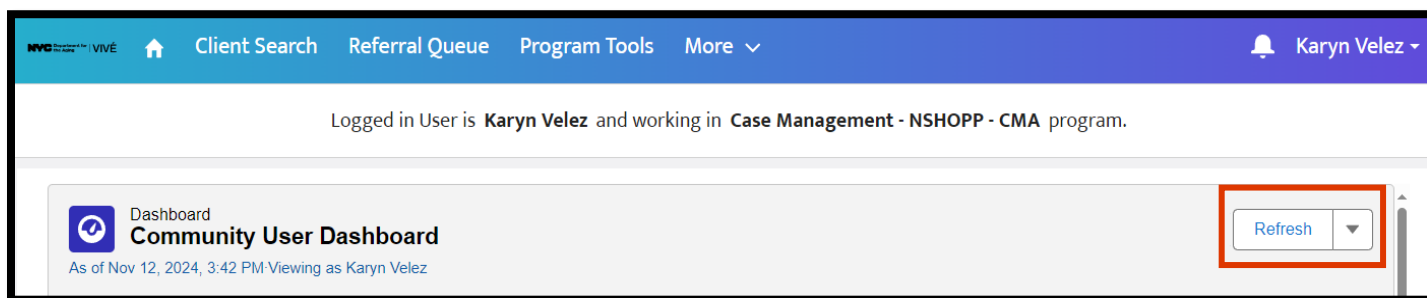
- **Home** – This functionality is used to bring you back to the **Dashboard** from any screen page in VIVÉ.
- **User Profile** – This functionality provides access to information about you including your 1) title, 2) supervisor’s name, 3) email address, 4) company name, telephone number and address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

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

Refresh Button

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

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



My Enrollments

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

Dashboard Community User Dashboard As of Nov 27, 2024, 2:36 PM-Viewing as Karyn Velez					Refresh
My Enrollments					
Contact ↑	Enrollment: Enrollment Name	Enrollment Status	Enrollment Date	Service Start Date	
test-joe client	Case Management - NSHOPP - CMA	Active	10/29/2024	10/29/2024	
test-june client	Case Management - NSHOPP - CMA	Inactive	12/7/2023	11/12/2024	
test-peter client	Case Management - NSHOPP - CMA	Inactive	11/12/2024	11/12/2024	
test-roger client	Case Management - NSHOPP - CMA	Inactive	11/8/2024	11/8/2024	
test-sandra client	Case Management - NSHOPP - CMA	Active	11/6/2024	11/6/2024	
test-von client	Case Management - NSHOPP - CMA	Active	11/27/2024	11/27/2024	
View Report (My Enrollments)					

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

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

Accessing the Client Profile

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

The screenshot displays the client profile interface for a user named 'test-sandra client'. At the top left, there is a placeholder for a profile picture with an 'Upload Picture' link below it. To the right of the picture placeholder, the client's name 'test-sandra client' is displayed next to a purple ID card icon; this entire section is highlighted with a red rectangular box. Further right is a button labeled 'Inactivate Client Profile'. Below the name, client details are listed: 'ID' (0999001577), 'Status' (Active), and 'Contact Type' (Client). A horizontal menu bar contains several tabs: 'Details', 'Consents', 'Contacts', 'General Comments', 'Referrals', 'Enrollments', 'Unit Entry', 'Documents', and 'More' (with a dropdown arrow). The 'Details' tab is currently selected. Under the 'Details' tab, a sub-menu lists 'Basic Demographics' (which is underlined), 'Social Demographics', 'Emergency Preparedness', 'Financial', and 'NYSOFA Additional Info'.

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

[View Report \(My Enrollments\)](#)

Accessing Enrollment Menu

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

Contact
test-sandra client

Assigned To
Karyn Velez

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

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

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

[View Report \(My Enrollments\)](#)

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.

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

Accessing the Follow-Up Request Screen

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

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

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

VIVÉ Knowledge Base – Dashboard

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

Follow up Request

Benefit and Entitlement Call

Edit Assigned To

Subject

Benefit and Entitlement Call

Reason

Client interested in applying for certain programs.

Status

Open

Created By

Karyn Velez

Assigned To

Karyn Velez

Follow-Up Date

11/11/2024, 1:00 PM

Enrollment

[Case Management - NSHOPP - CMA](#)

Last Modified By

Karyn Velez

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

My Follow-Ups

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

[View Report \(My Follow-Ups\)](#)

My Tasks

My Tasks is a program specific “tickler” for yearly client profile updates such as the Annual Client Enrollment Update or Reassessments. Unlike **My Enrollments** or **My Follow-Ups**, **My Tasks** will automatically alert all your VIVÉ program users of the clients who need their records updated.

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

[View Report \(My Tasks\)](#)

My Tasks displays information such as the type of client profile update needed, the **Task Status** (Open, In Progress or Closed), any **Actions** that have been taken regarding the task and the task’s **Priority** level (Normal, Medium or High). In addition, under the heading **Task: Task Number**, upcoming tasks are given an identification number that can be sorted as needed.

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

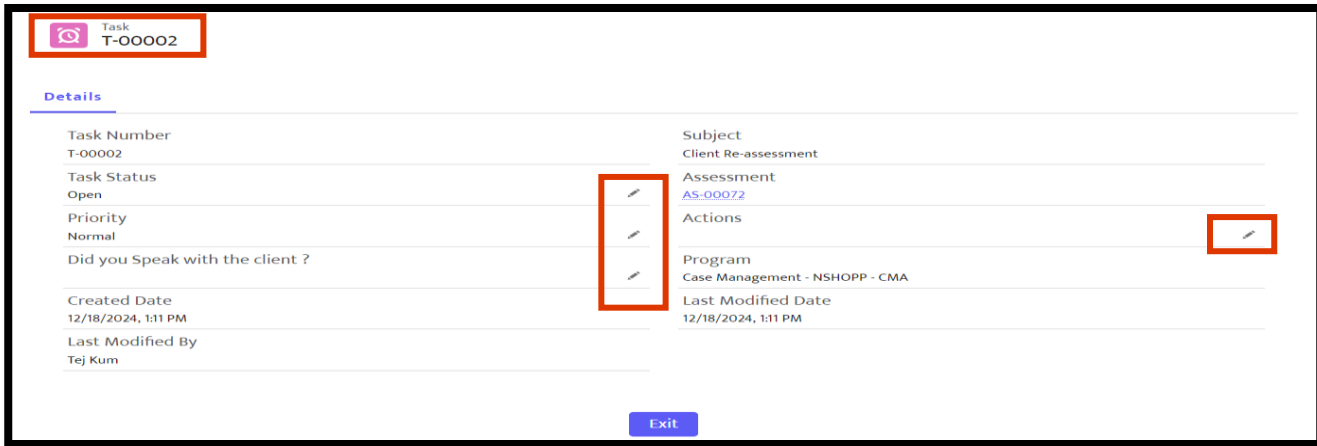
Accessing the Task Details

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

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

[View Report \(My Tasks\)](#)

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



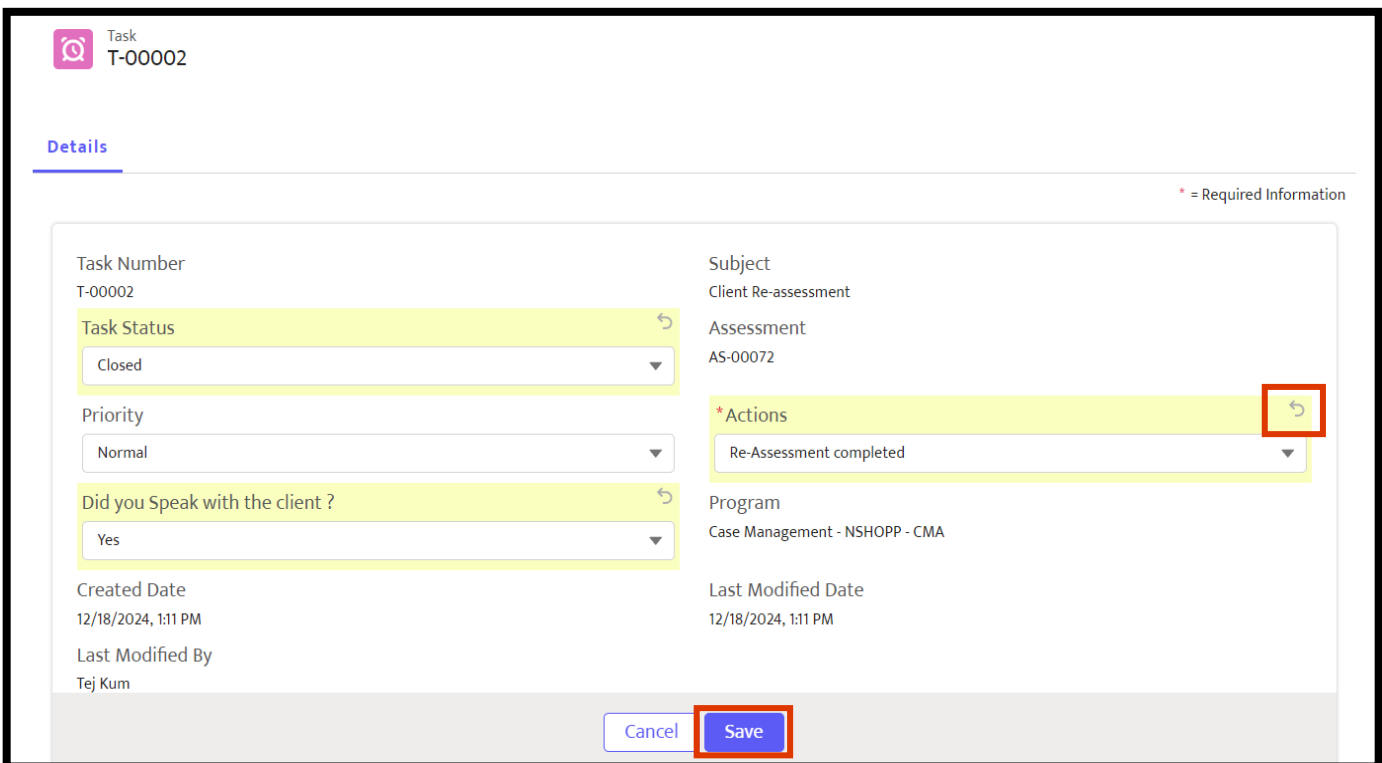
Task T-00002

Details

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

Exit

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



Task T-00002

Details

* = Required Information

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

Cancel Save

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

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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

[Return to VIVÉ Knowledge Base](#)

The VIVÉ Documents Reference Guide

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

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

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

In this guide you will learn:

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

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

Overview of Documents

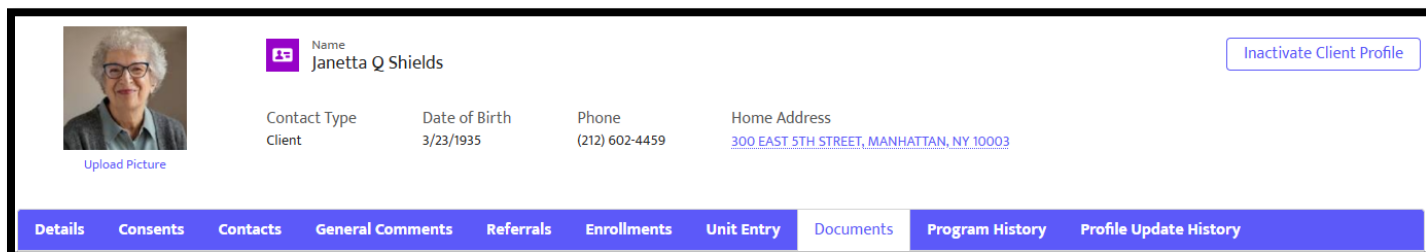
Documents featured in VIVÉ provides the ability for you to add, edit, and view a record of various document types associated with a client's file by uploading them into the database.

Navigating to Documents

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

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

Details Menu: Client Profile



This screenshot shows the 'Details Menu: Client Profile' for Janetta Q Shields. The header includes a profile picture, name, and an 'Inactivate Client Profile' button. Below this, client information is displayed: Contact Type (Client), Date of Birth (3/23/1935), Phone ((212) 602-4459), and Home Address (300 EAST 5TH STREET, MANHATTAN, NY 10003). A navigation bar at the bottom contains tabs: Details, Consents, Contacts, General Comments, Referrals, Enrollments, Unit Entry, Documents (highlighted), Program History, and Profile Update History.

Enrollment Details Menu



This screenshot shows the 'Enrollment Details Menu' for 'Case Management - NSHOPP - CMA'. It includes an 'Enrollment' icon, contact information for Janetta Q Shields, and the assigned worker David Dring. Buttons for 'Assign Worker' and 'Closing Enrollment' are visible. The navigation bar at the bottom includes: Enrollment Details, Forms, Assessments, Waitlist, Cost Share Plan, Meal Delivery Plan, Home Care Service Plan, Documents (highlighted), and a 'More' dropdown.

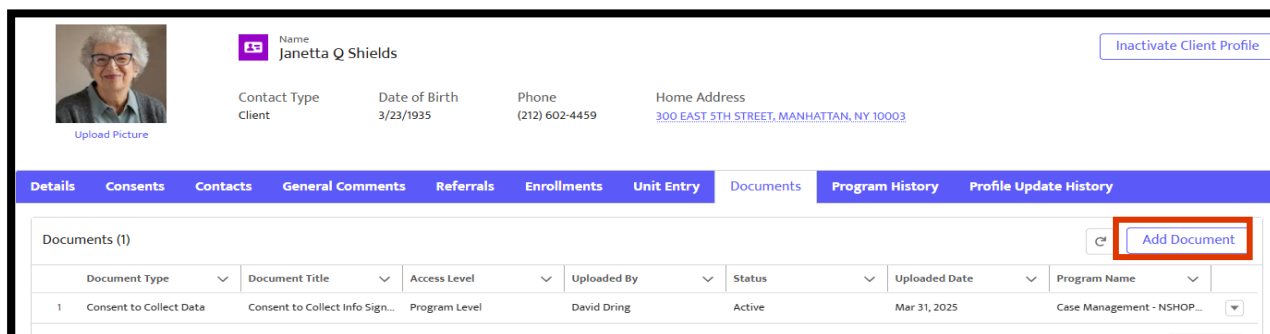
Adding Documents

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.



This screenshot shows the 'Documents' list view for Janetta Q Shields. The 'Add Document' button is highlighted with a red box. Below the button is a table of existing documents.

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

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

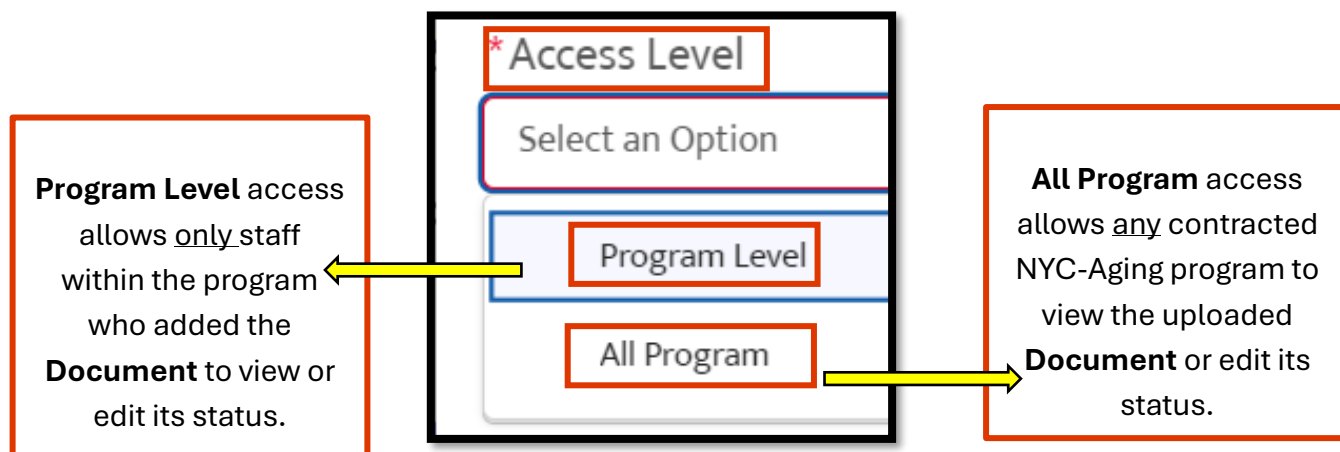
Access Level

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

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

- Document Type:** Legal Document
- Access Level:** Program Level (highlighted with a red box)
- Document Title:** POA-test-hope-11-2024
- Status:** Active
- Description:** Copy of POA for Medicaid application.
- Upload Document:** POA-test-hope_11-2024.pdf

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



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

Upload Files

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

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

Add Document

* Document Type

Legal Document

* Access Level

Program Level

* Document Title

POA-test-hope-11-2024

Status

Active

Description

Copy of POA for Medicaid application.

Upload Document

Upload Files

Or drop files

POA-test-hope_11-2024.pdf

Cancel

Save

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.

DetailsConsentsContactsGeneral CommentsReferralsEnrollmentsUnit EntryDocumentsProgram HistoryProfile Update History

Documents (2)

Document TypeDocument TitleAccess LevelUploaded ByStatusUploaded DateProgram Name

1Consent to Collect DataConsent to Collect Info Si...Program LevelDavid DringActiveFeb 23, 2025Case Manager

2Client IDTest.jpgAll ProgramSonia Torres CommunityActiveJan 31, 2025Case Manager

Add Document

Edit StatusDownload

Edit Document Status

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

VIVÉ a Product of NYC Aging

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Last Updated: 5/9/2025

VIVÉ Knowledge Base - Documents

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

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

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

Edit Document Status

Status

Inactive

Cancel

Save

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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Contact the VIVÉ Application Support Center via VIVESupport@aging.nyc.gov

[Return to VIVÉ Knowledge Base](#)

[Return to VIVÉ Knowledge Base](#)

VIVÉ Admin Tools Reference Guide

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

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

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

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

In this guide you will learn:

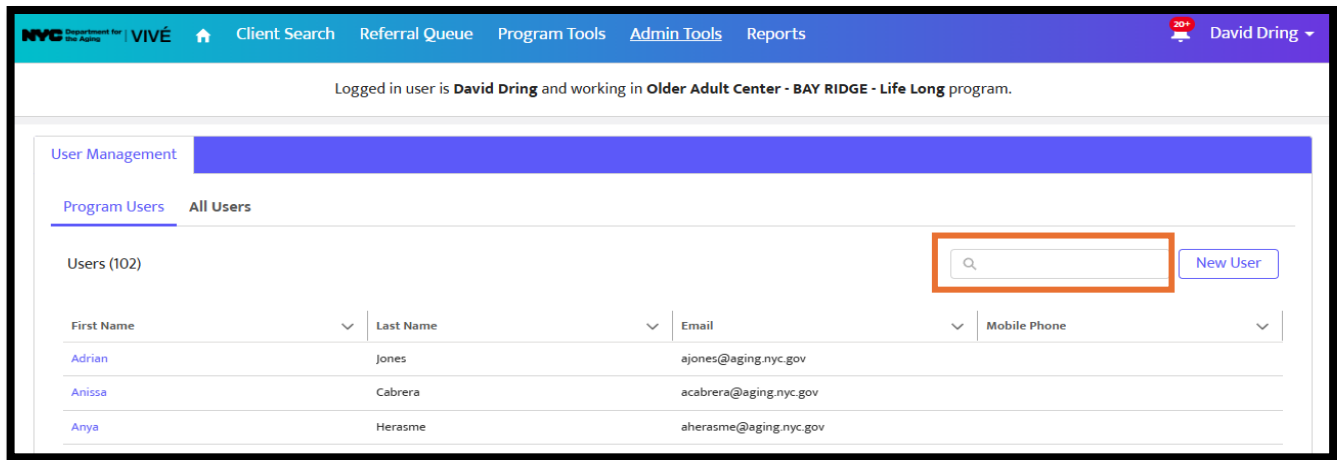
- **Accessing Admin Tools**
- **Viewing Users**
 - Searching for Users
- **Creating a New User**
- **Editing a User**
 - Editing Basic Information
 - Editing User Roles with Program Associations
- **Inactivating a User from a Program Association**

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

Accessing Admin Tools

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

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



NYC Department for the Aging | VIVÉ

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

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

User Management

Program Users **All Users**

Users (102)

Search [] New User

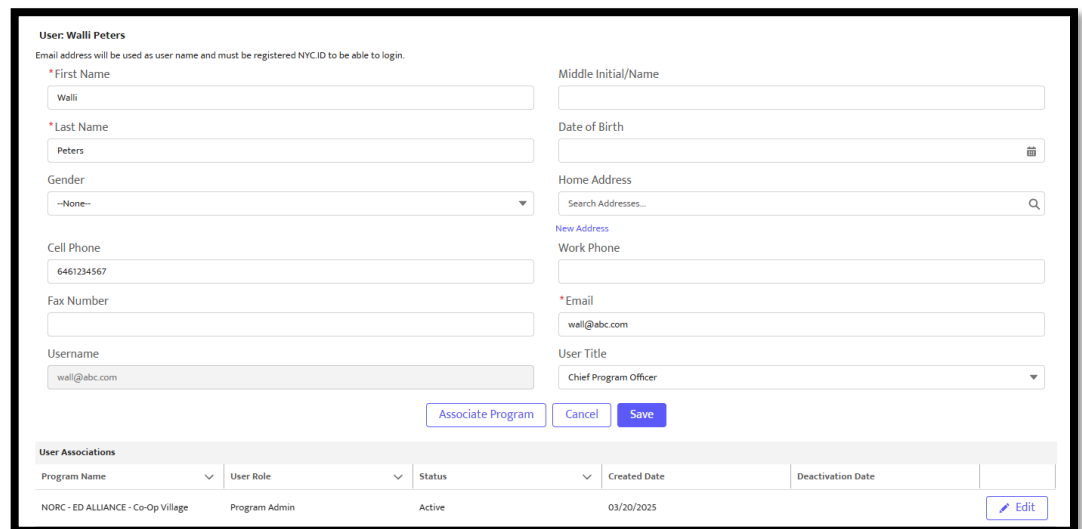
First Name	Last Name	Email	Mobile Phone
Adrian	Jones	ajones@aging.nyc.gov	
Anissa	Cabrera	acabrera@aging.nyc.gov	
Anya	Herasme	aherasme@aging.nyc.gov	

Viewing Users

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

Searching for Users

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



User: Walli Peters

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

*First Name: Walli

*Last Name: Peters

Middle Initial/Name:

Date of Birth:

Gender: --None--

Home Address: Search Addresses...

Cell Phone: 6461234567

Fax Number:

Username: wall@abc.com

Work Phone:

*Email: wall@abc.com

User Title: Chief Program Officer

Associate Program Cancel Save

User Associations

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

Edit

Creating a New User

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

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

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

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

There are four User Roles:

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

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

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.

User: Walli Peters

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

*First Name: Walli

*Last Name: Peters

Gender: --None--

Cell Phone: 6461234567

Fax Number:

Username: walli@abc.com

Middle Initial/Name:

Date of Birth:

Home Address: Search Addresses...

Work Phone:

*Email: walli@abc.com

User Title: Chief Program Officer

Associate Program Cancel Save

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

User Association

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

*User Role: Program Staff

*Status: Active

Cancel Save

Inactivating a User from a Program Association

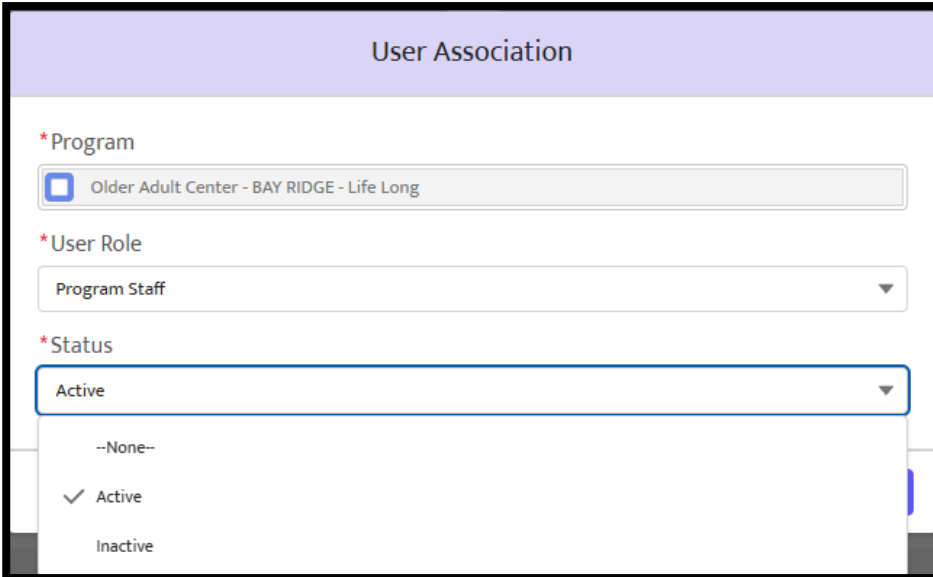
While users are never deleted from the system, they are inactivated from a program. In this way, they can be reactivated with another program later.

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

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

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

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



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

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

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**.

[Return to VIVÉ Knowledge Base](#)