MAY 9, 2025

VIVÉ REFERENCE GUIDE

FRIENDLY VISITING

NYC Department for the Aging

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.

[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:

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

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

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

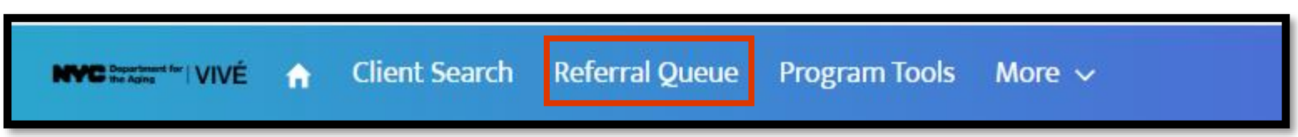
New Volunteer Flow Chart

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

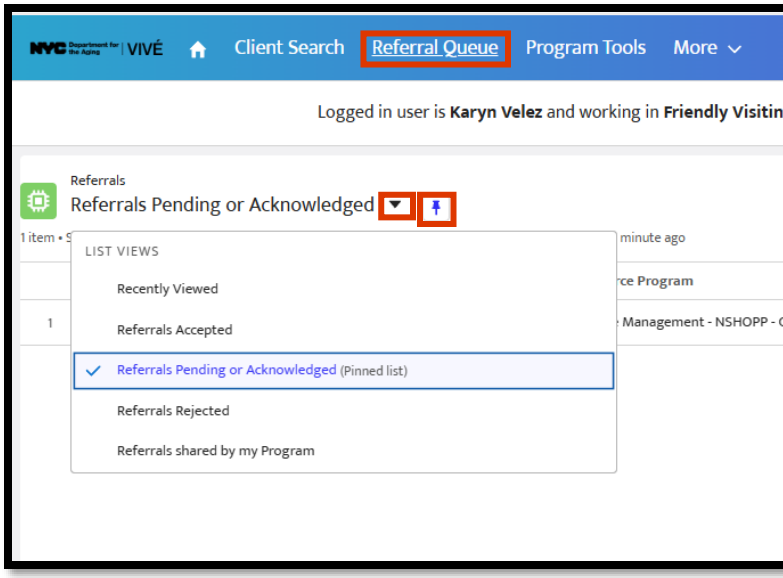
The **Referral Queue** is the starting point in evaluating the new client for enrollment into your **Friendly Visiting** program. **Referral Queue** is one of the links found on the **Top Menu**.



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

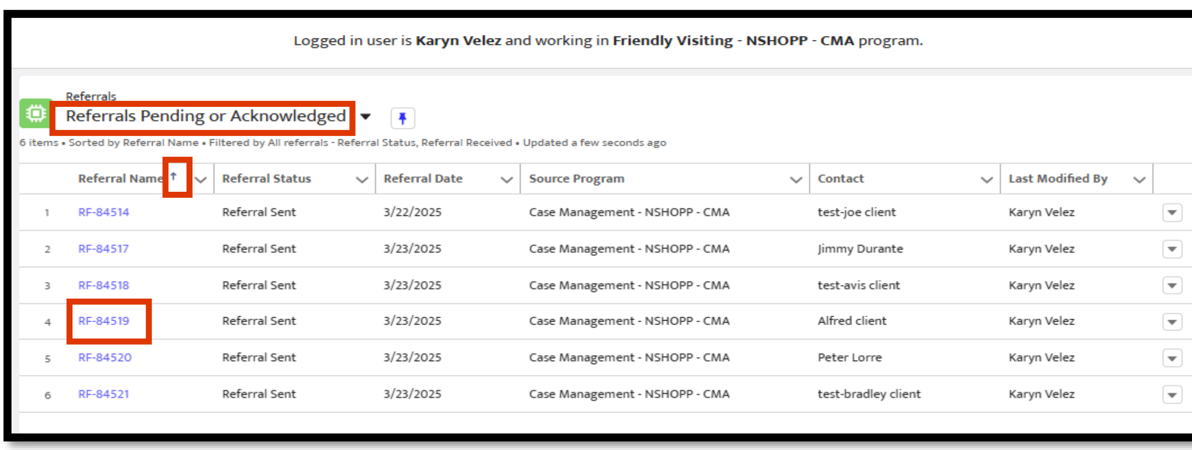
Step 1: Click the **Referral Queue** link. The **Referrals** List View appears. Using the dropdown arrow, you can access five different referral types. You can select one of these as your default **Referrals** type using the pin icon.



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.

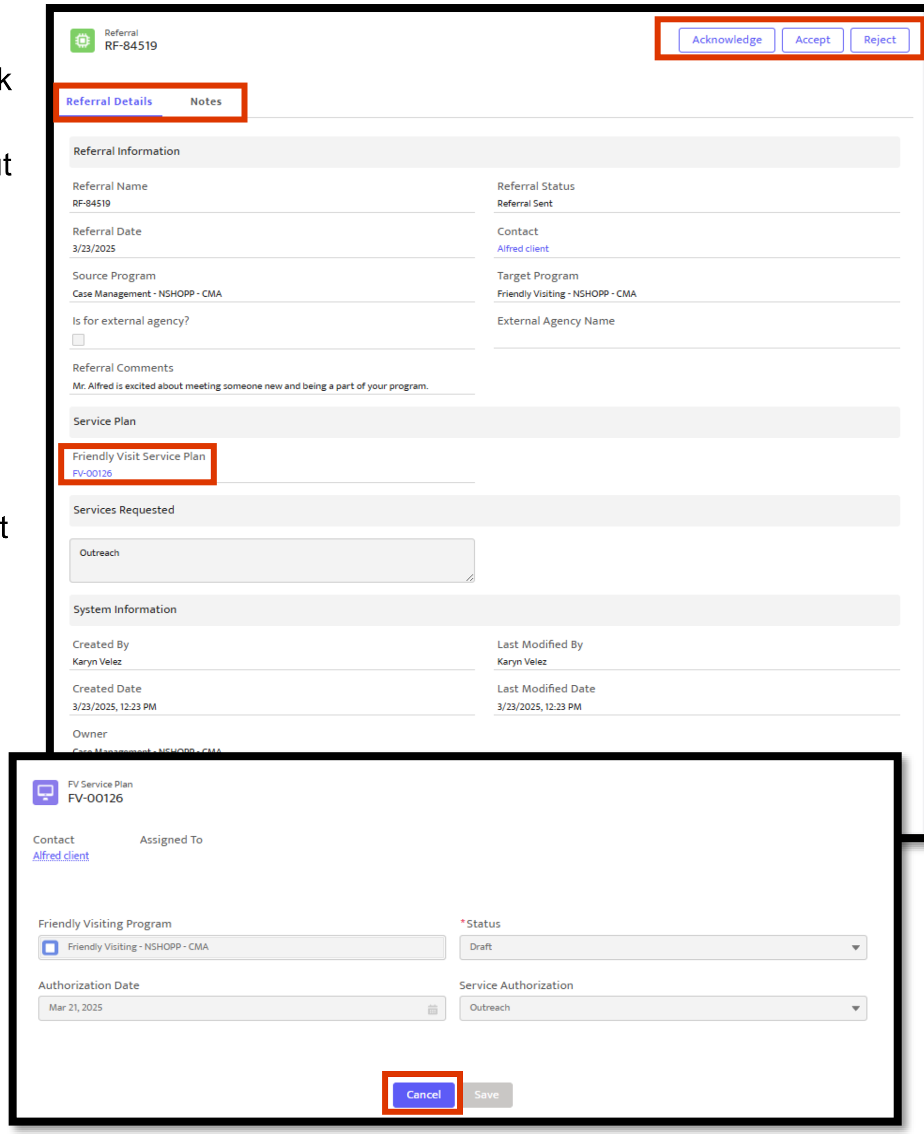
Step 2: To view pending referrals, pick **Referrals Pending or Acknowledged**. You can sort the list by clicking on the column headings. For example, click the arrow next to **Referral Name** to sort the list in either ascending or descending order.



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.

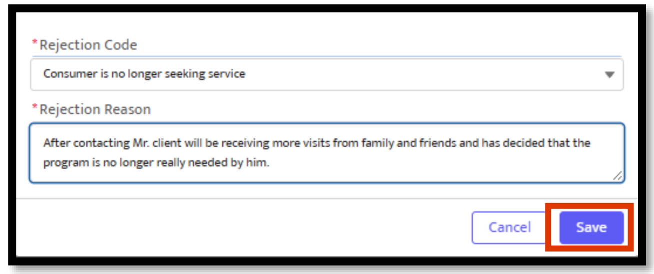
Step 4: On the **Referrals Details** page under the Friendly Visiting Service Plan, click on the link to view a read-only page of the **Friendly Visiting Service Plan**.



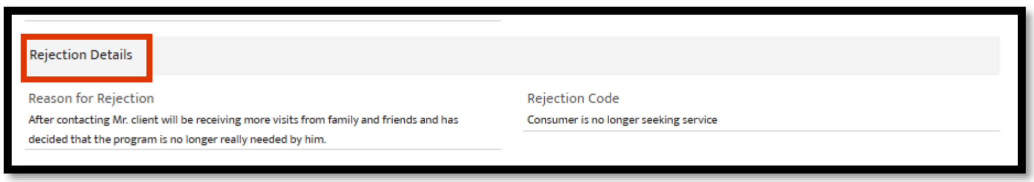
Step 5: From the **Referral Details** page, you can also **Accept** or **Reject** the referral. If you select **Accept**, the system confirms the referral has been accepted by your program. The **Accept** and **Reject** buttons are replaced with a **Create Enrollment** button on the **Referral Details**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



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.



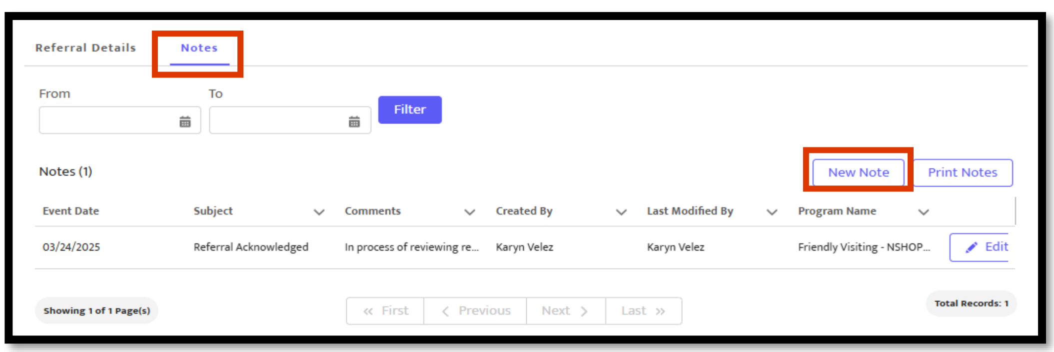
VIVÉ automatically updates the **Referrals shared by my Program** List View of the program that made the initial service request.

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.

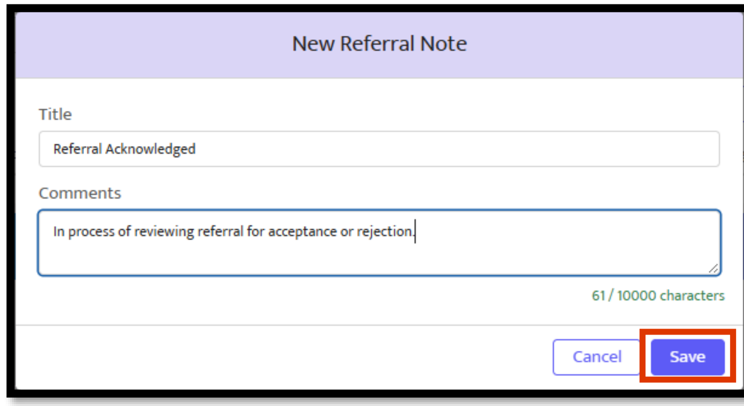


Adding a New Referral Note:

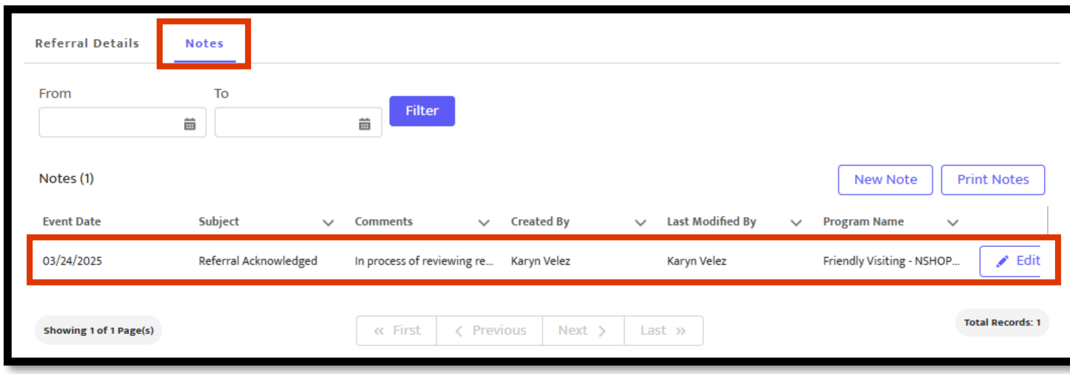
Select the **New Note** button.

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

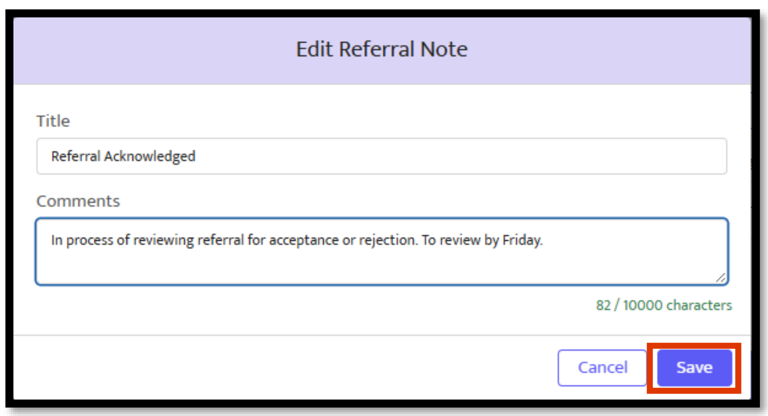
You return to the List View where information about the note is displayed. An **Edit** button is available to the far-right of the note row.



Editing a Referral Note



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



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

The edited item reflects on the List View.

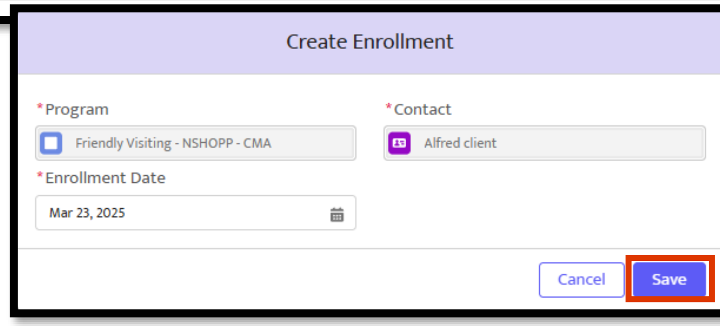
Enrollment

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.

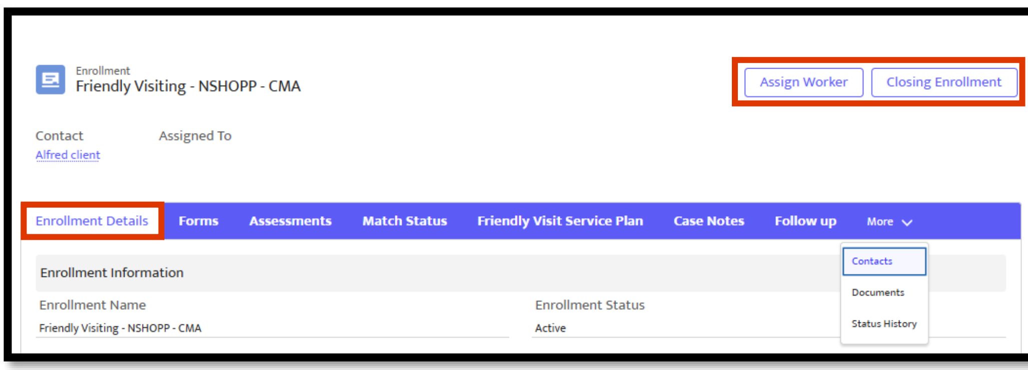
Enrollment of a New Client

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

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**.

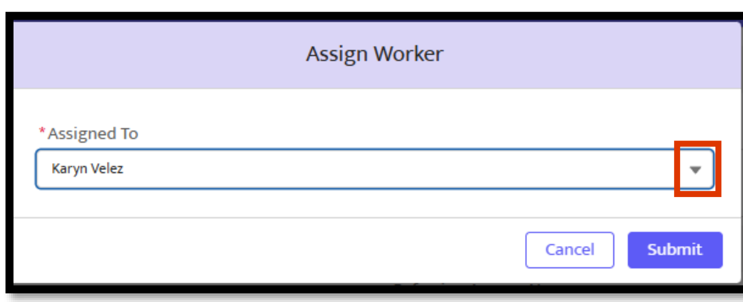


Step 3: After selecting **Save**, the Enrollment Details Menu appears. This page includes tabs to access various forms, complete assessments, match clients to volunteers and more. The default tab is **Enrollment Details**, which provides an overview of the client's enrollment and referral information.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



To Assign Worker:

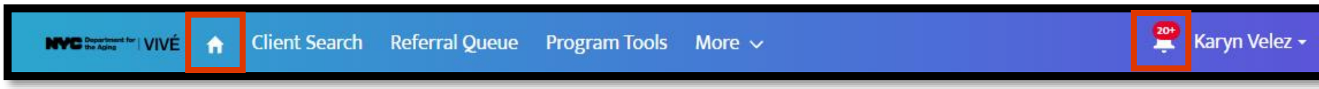
Step 1: From the **Enrollment Details Menu** in the upper right-hand corner, select **Assign Worker**. In the pop-up, use the dropdown menu to pick a team member to assign to this client.



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

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

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



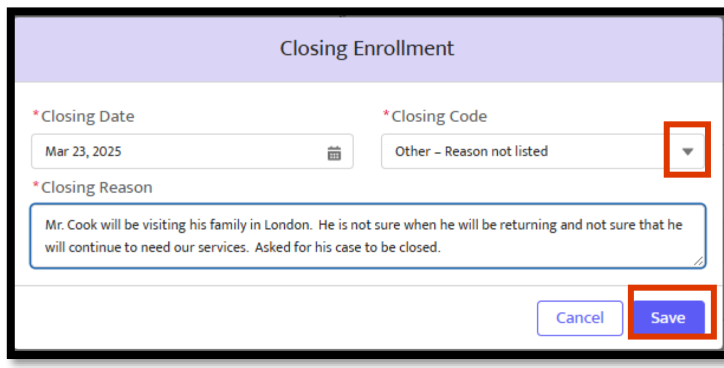
NOTE: *If the worker assignment needs to be changed, the **Assign Worker** button is available on the **Enrollment Menu**. Complete this same process to re-assign the client's case.*

To Close Enrollment:

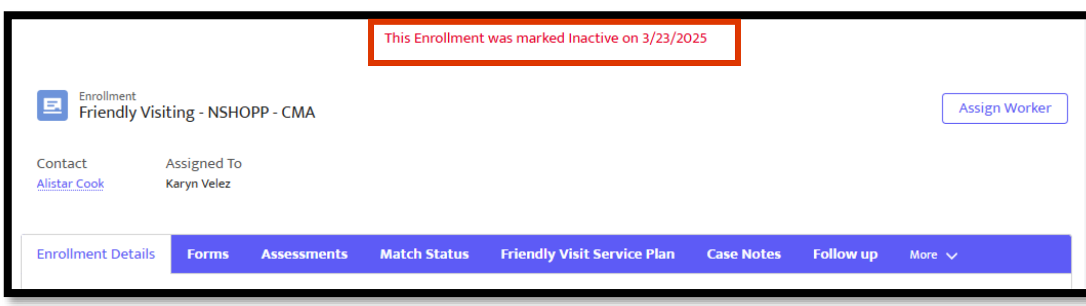
Step 1: From the **Enrollment Details Menu**, select the **Closing Enrollment** button to inactivate the client from your program. Closing this enrollment will not close any enrollments with other NYC Aging programs.

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

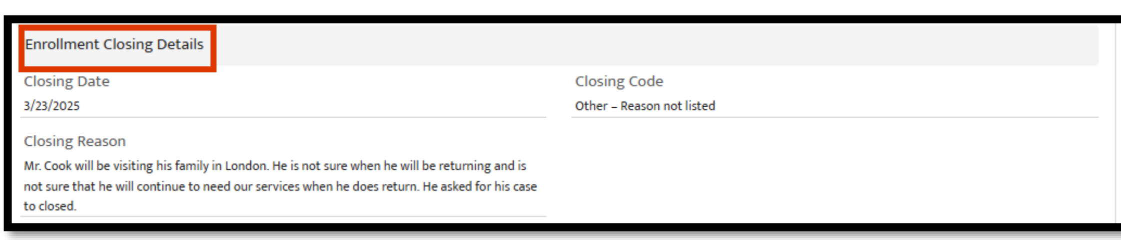
Step 3: Use the dropdown arrow to pick a reason for the closure. Confirm that all required fields are completed before selecting **Save**.



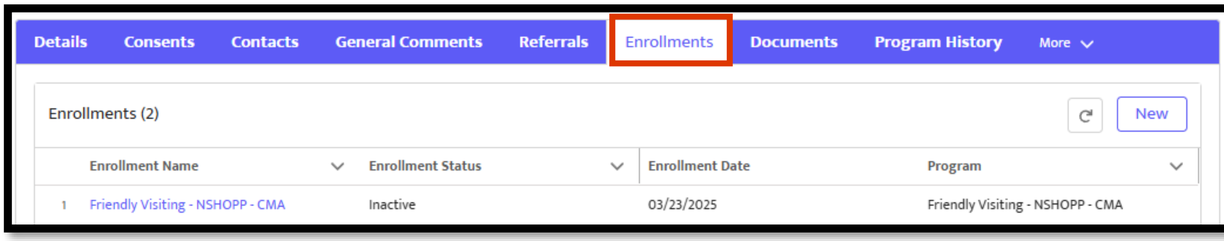
You return to the **Enrollment Details Menu** where a notation on the inactivation of the enrollment will be displayed.



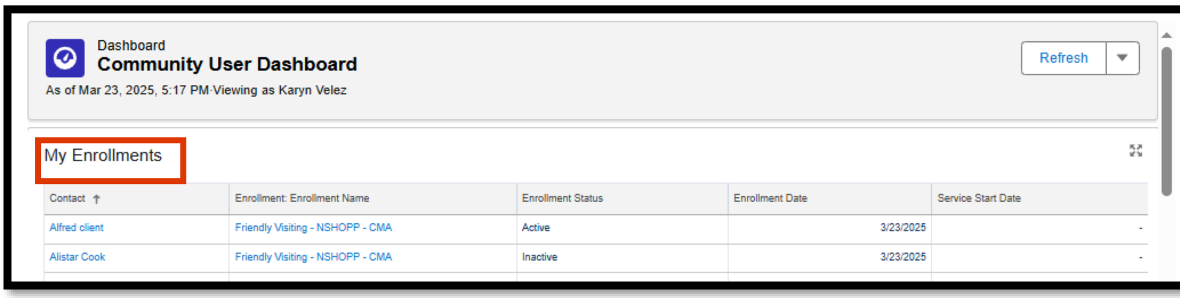
In the middle of the Enrollment Details page, details of the enrollment closing are available.



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.



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



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

Viewing a CMA Case Note

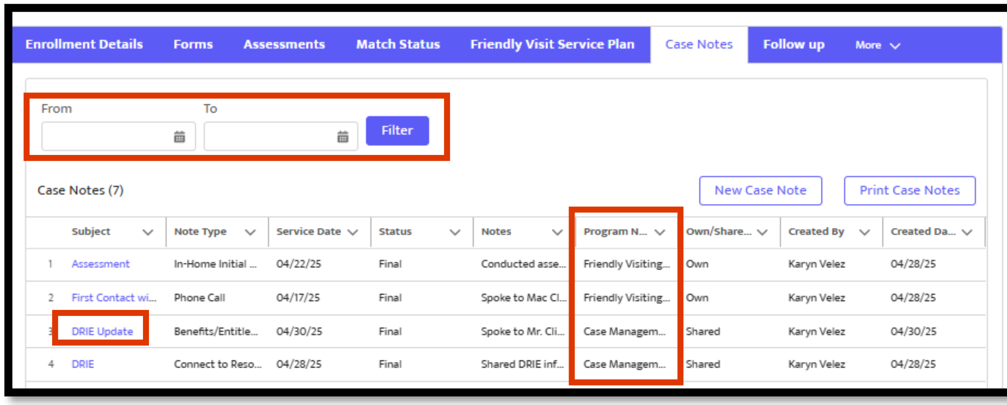
Case notes that have been shared by the case management agency can be viewed in read-only status using the Case Notes tab. There are three ways to access the **Case Notes** tab after accepting and enrolling the client:

a. From the **Enrollment Details Menu**, click the **Case Notes** tab.

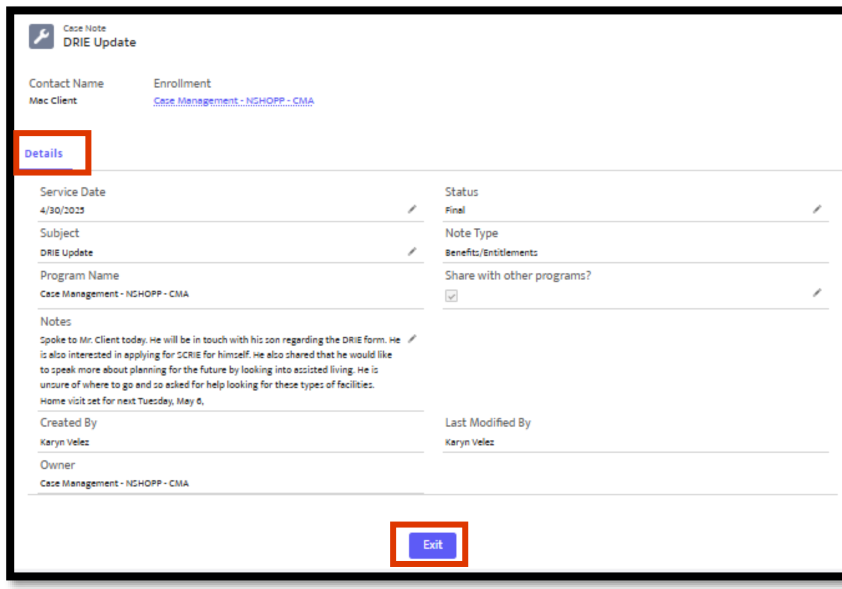
b. Using **Client Search** find your client. From the **Details Menu** click on the **Enrollment** tab, then click on the **Case Notes** tab.

c. 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.



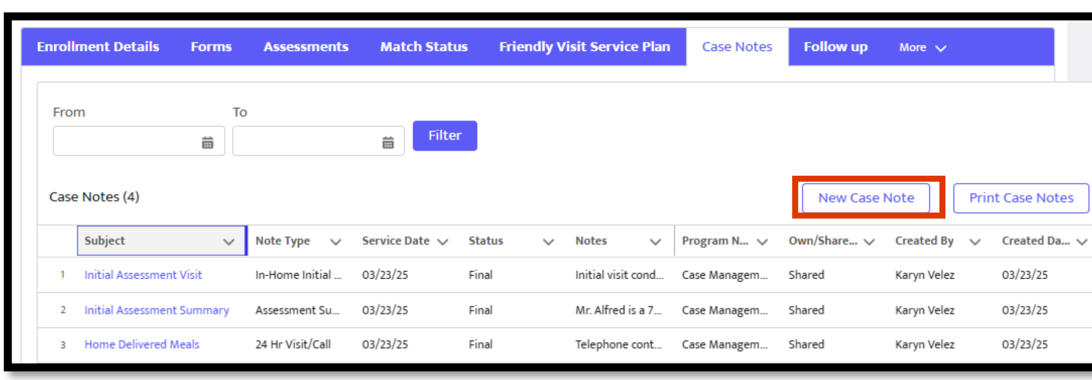
Step 2: The read-only form (the record cannot be edited), displays pertinent information including the case note entry in the **Notes** field. Select **Exit** to return to the **Case Notes** tab.



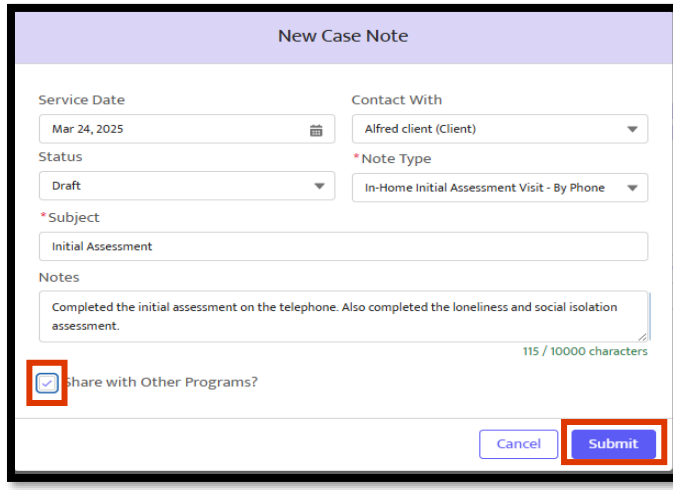
Creating a New Friendly Visiting Case Note

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.



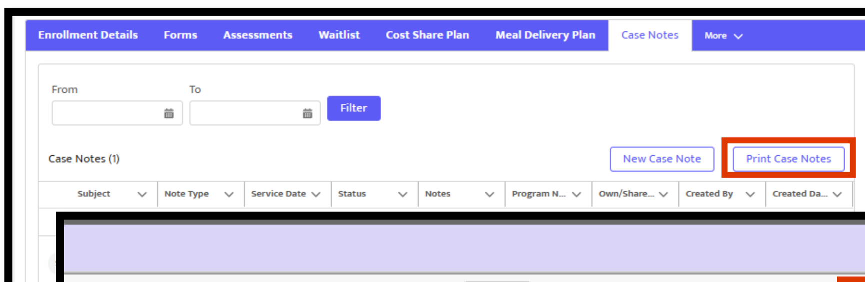
If you want this case note to be shared with the client's case management program, be sure to select the **Share with Other Programs** checkbox before selecting **Submit**.

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.

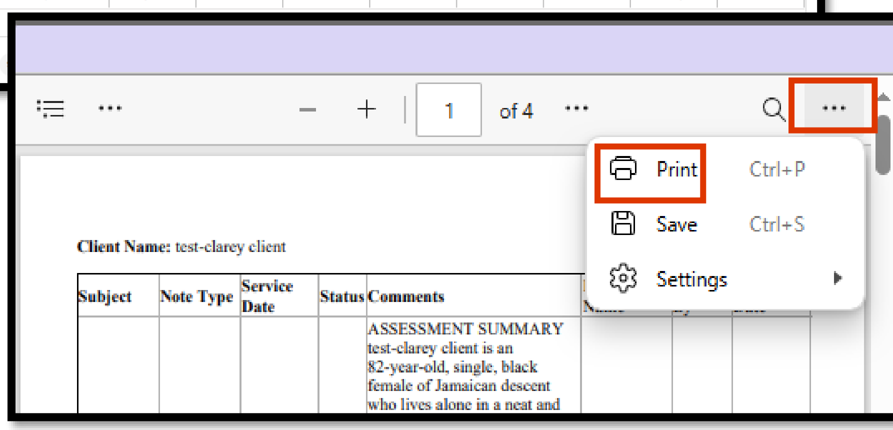
Printing Case Notes

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.



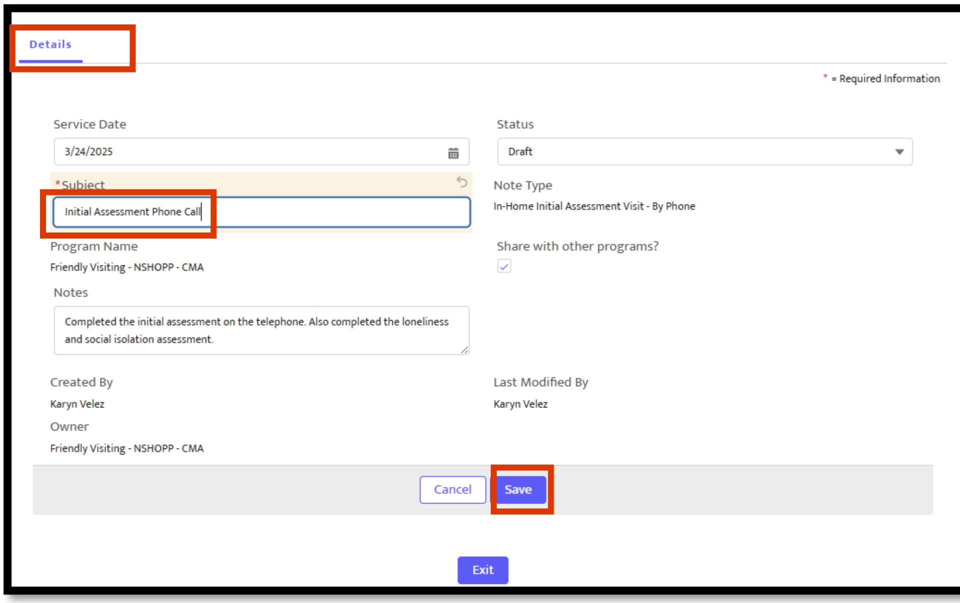
Step 2: Select the 3-dots at the top right of the window to access the dropdown menu selection. Choose **Print**. Exit the pop-up and return to the **Case Notes** List View.



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.

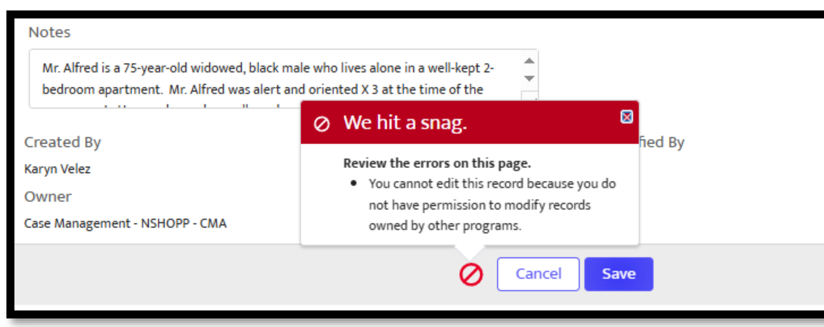
Step 2: Click on the Subject link name to access the Case Notes Details page.

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**.

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.



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.

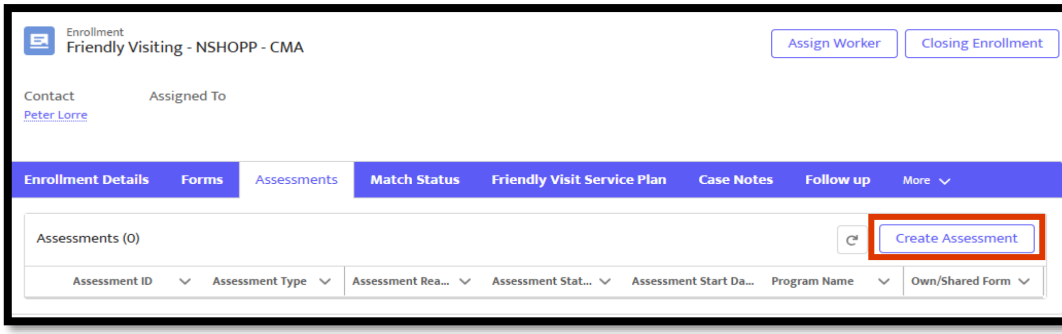
- **Page View** forms link directly to the questions. **FV Program Assessment** is Page View.
- **List View** forms provide a historical list of completed forms. The list often includes multiple completed forms. **Loneliness/Social Isolation (FV)** is List View.

Creating a Friendly Visiting Program Assessment

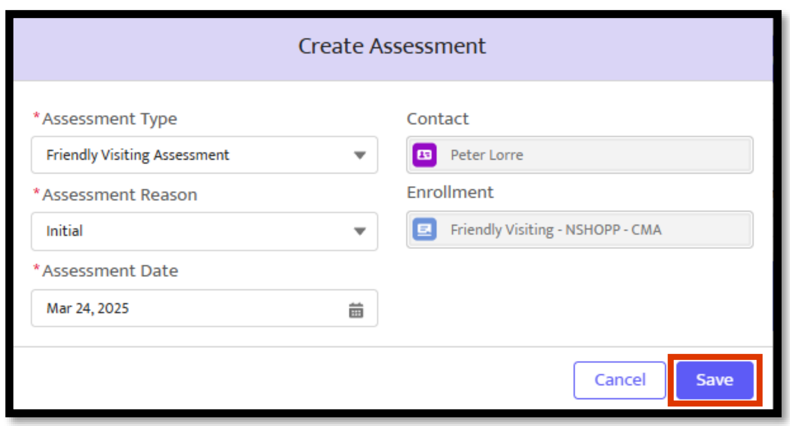
Step 1: From the **Top Menu**, search for a client using either **Client Search** or **Referral Queue**. Click on the desired client's link. From the **Details** menu, click the **Enrollments** tab. Click **Enrollment Name** link.

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

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



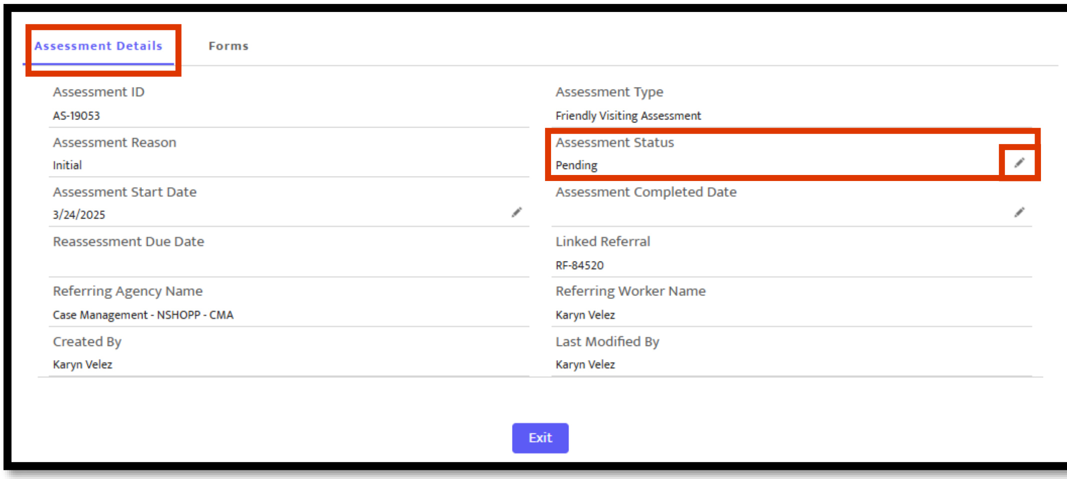
Step 4: From the **Create Assessment** pop-up complete the required fields. The **Assessment Date** can be in the past but never in the future. Confirm that all required fields are entered before selecting **Save**.



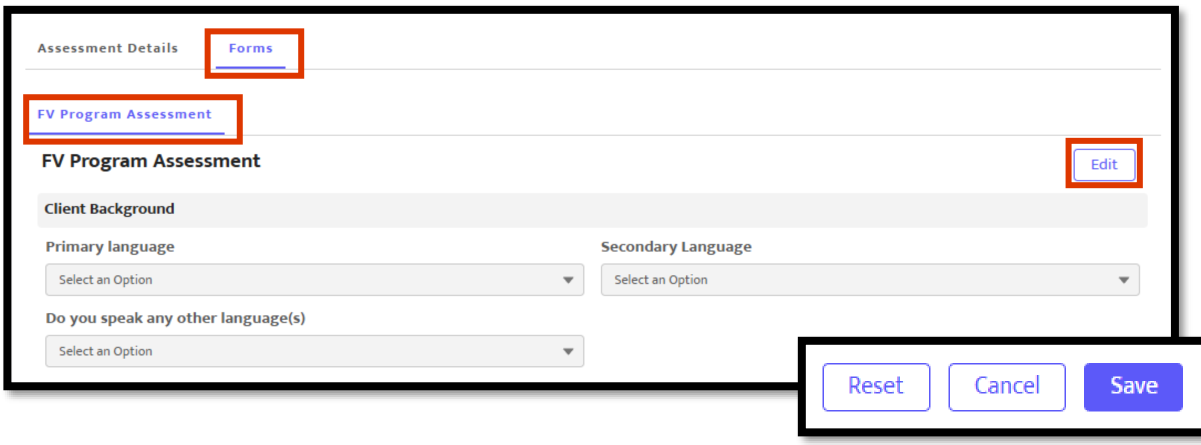
The **Assessment Details** form opens with general information about the assessment and an **Assessment Status** of **Pending**.

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.

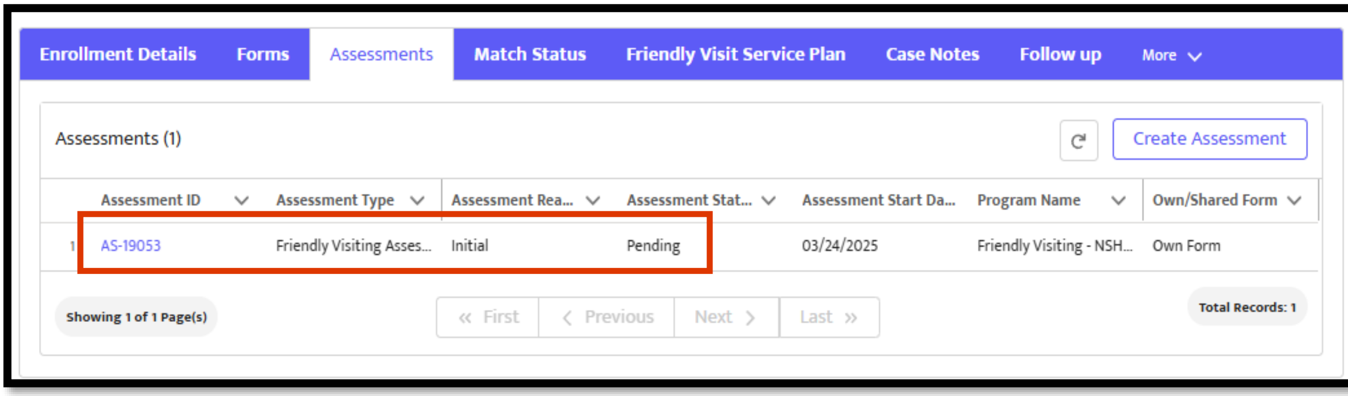


After entering or editing a Page View form, there are three additional actions to choose from:

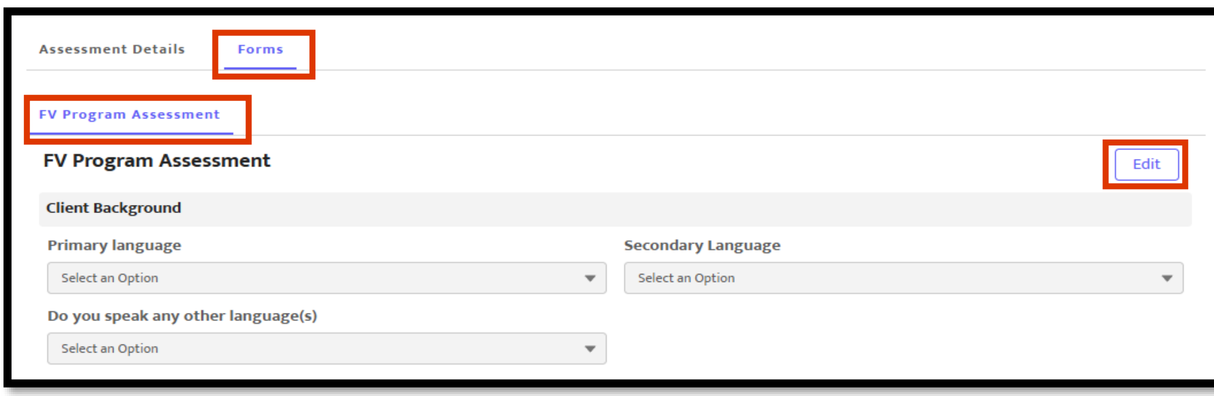
- **Reset**: A pop-up box asks you to confirm that you want to clear all the information entered.
- **Cancel:** Does not save any changes and reverts to the last version of the saved form.
- **Save:** The information entered is saved and you stay on the form.

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.



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

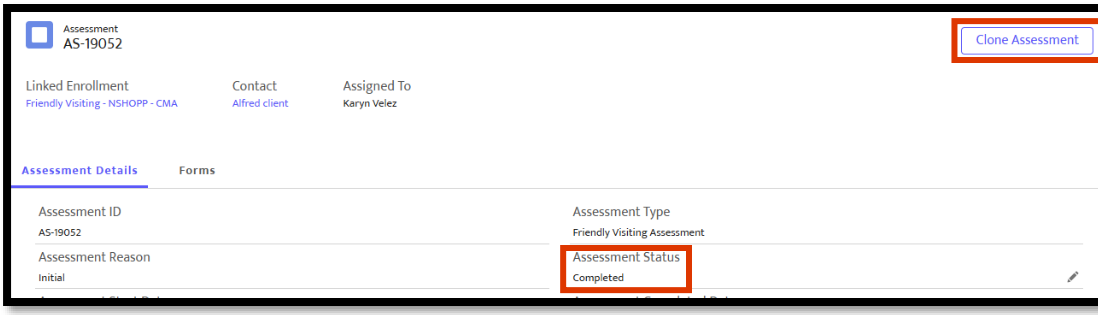


Step 3: After entering the required information, select **Reset**, **Cancel** or **Save**.

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**.

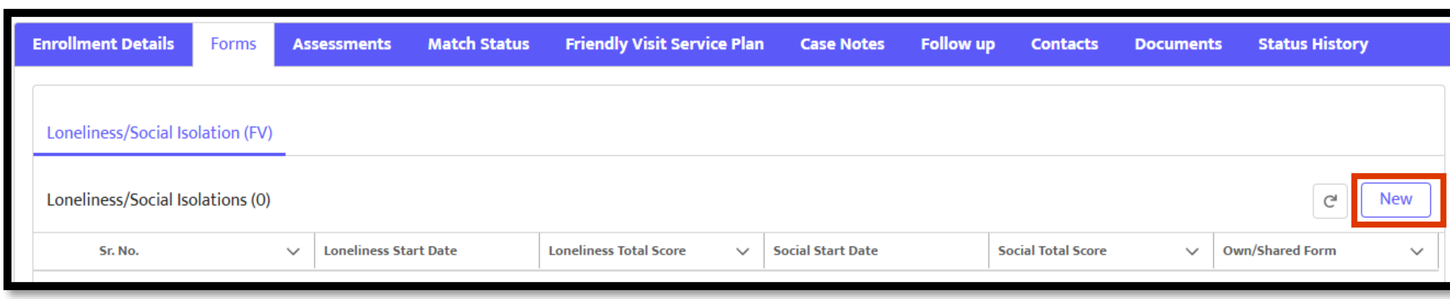


Creating a New Loneliness/Social Isolation Form

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

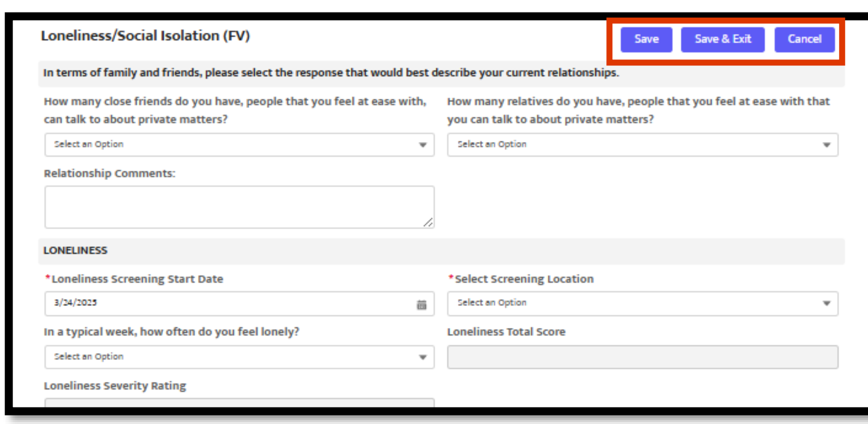
Step 2: From the **Details** menu, click the **Enrollments** tab.

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



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

Step 5: Enter all the required information.



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

- **Save:** The **Loneliness Serverity Rating**, **Loneliness Total Score**, **Social Isolation Severity Rating** and **Social Isolation Total Score** are calculated. The information entered is saved and you stay on the form.

- **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**.

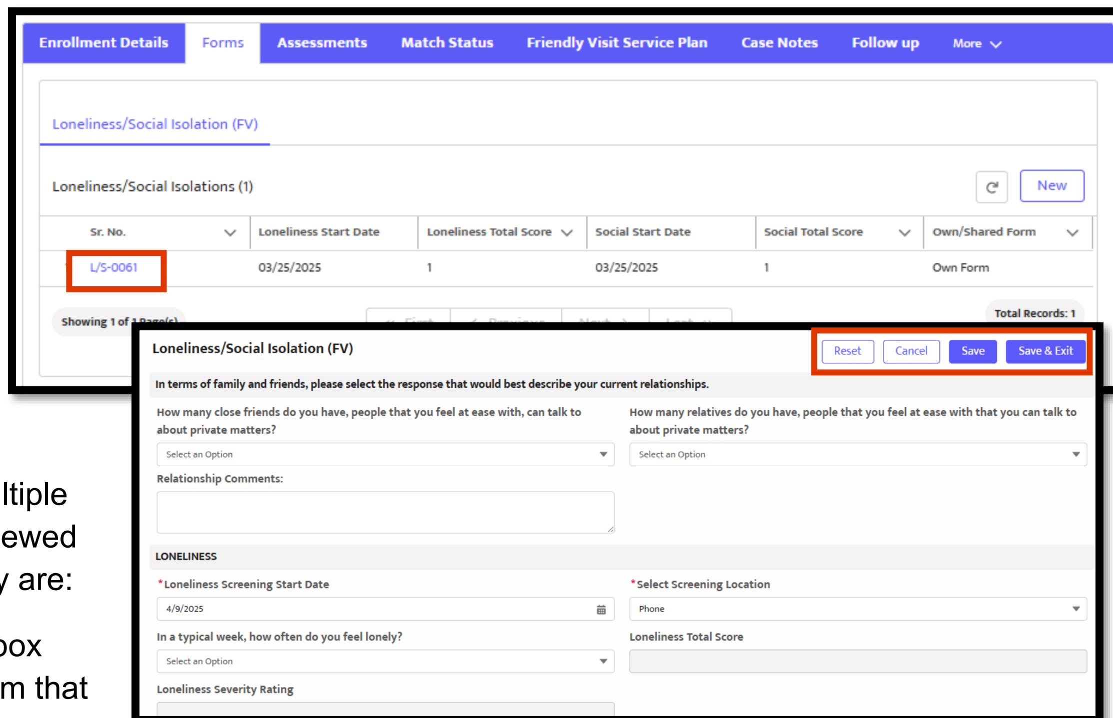
Editing the Loneliness/Social Isolation Form

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

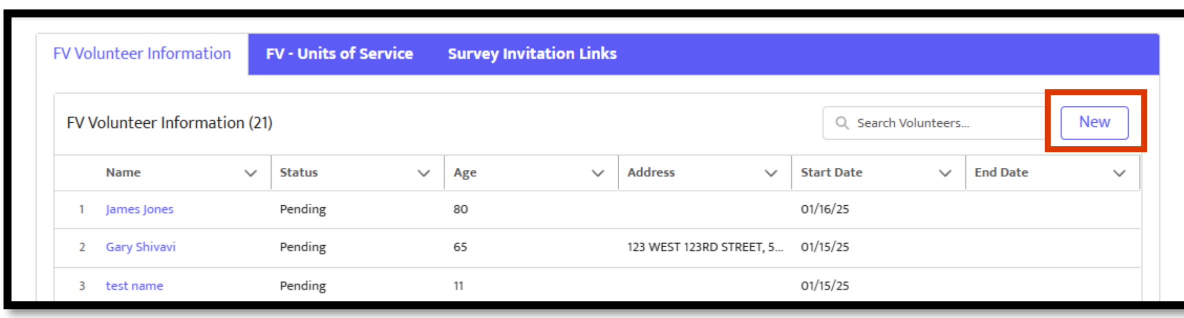
When entering a new volunteer in VIVÉ, the process follows the basic flow represented in the New Volunteer Flow Chart diagram above. This process is managed via the Program Tools section where both FV Volunteer Information and FV Units of Service are accessible.

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

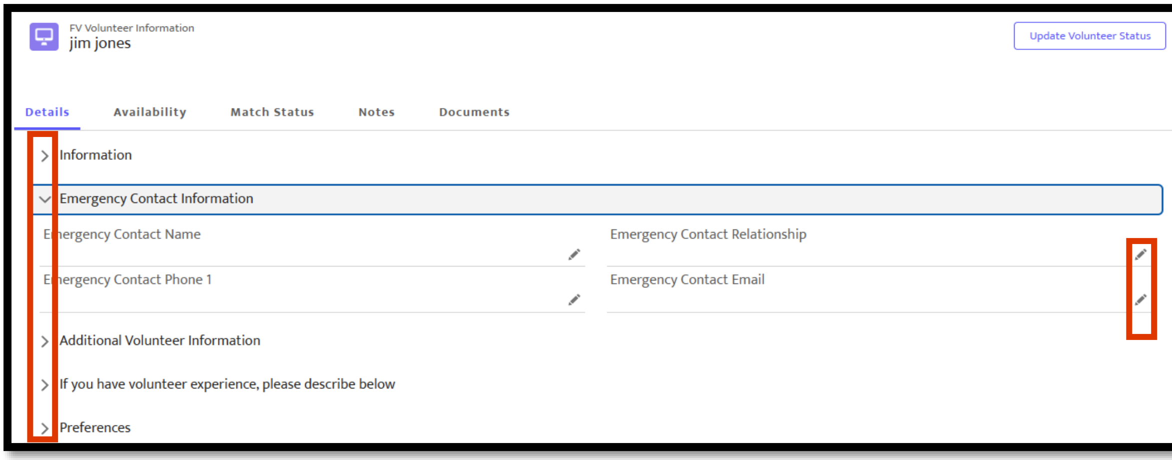
Step 1: From the **Top Menu**, click **Program Tools**. Click the **FV Volunteer Information** tab.



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

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

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



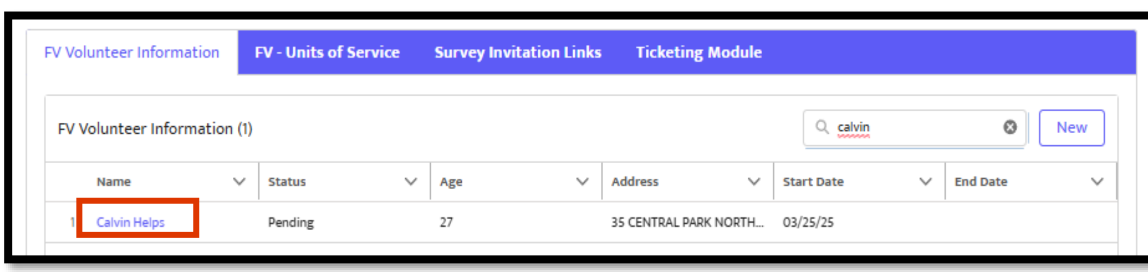
The Details section includes multiple types of information. The sections can be collapsed or expanded. Click the **Caret** to the to reveal additional information or hide information. For example, the Emergency Contact Information caret is facing down and displaying more fields.

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

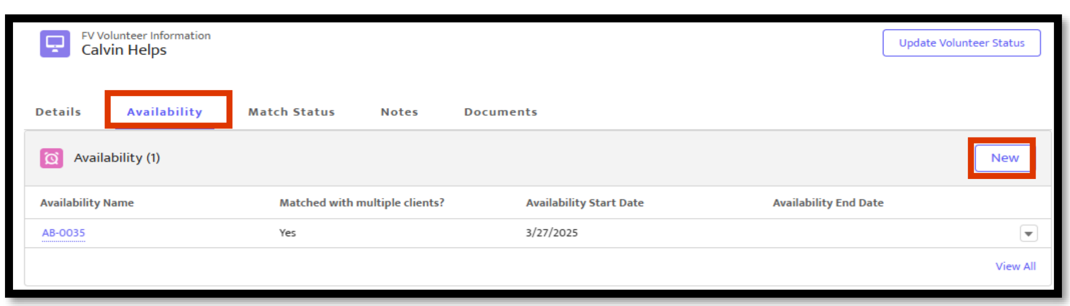
Adding Volunteer Availability

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.



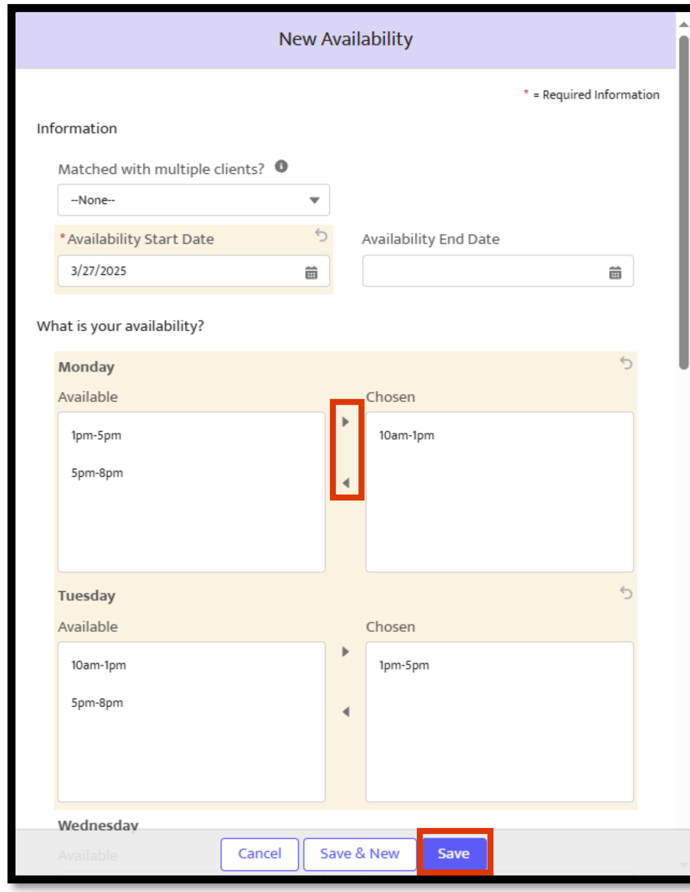
Step 2: Select the **Availability** link and then the **New** button.



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

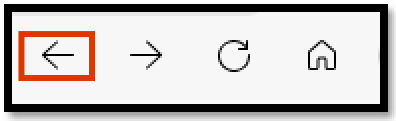
Step 1: From the **Top Menu**, click **Program Tools**. Click the **FV Volunteer Information** tab.

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

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

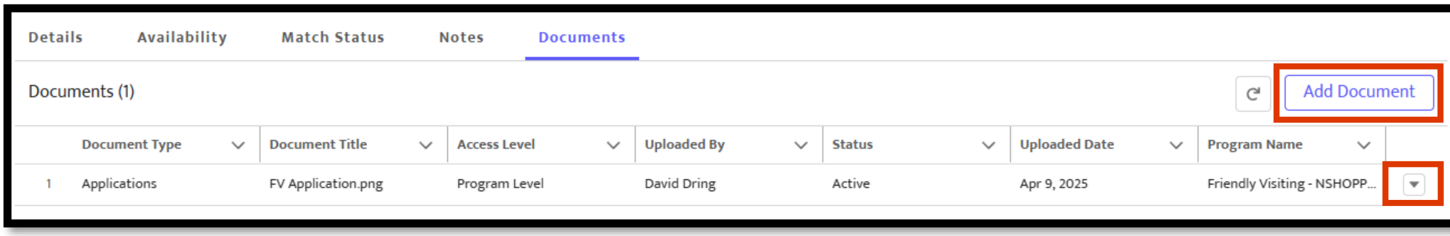
Step 4: Click any pencil icon to open fields for editing. Select **Save** when completed.

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.

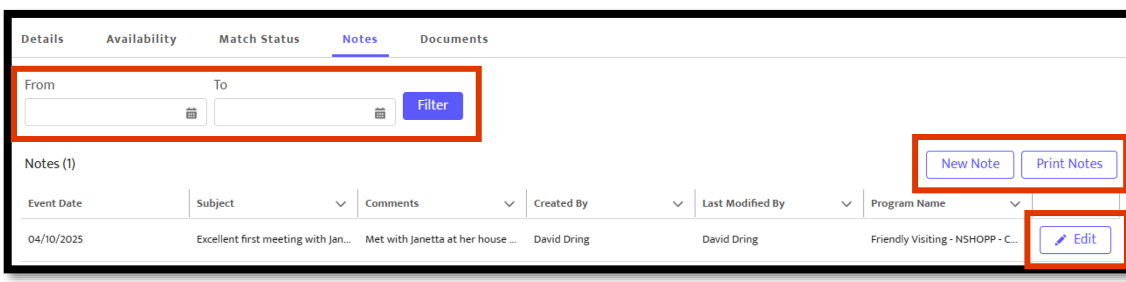


To add a new document, select the **Add Document** button and follow the common procedures.

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.



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

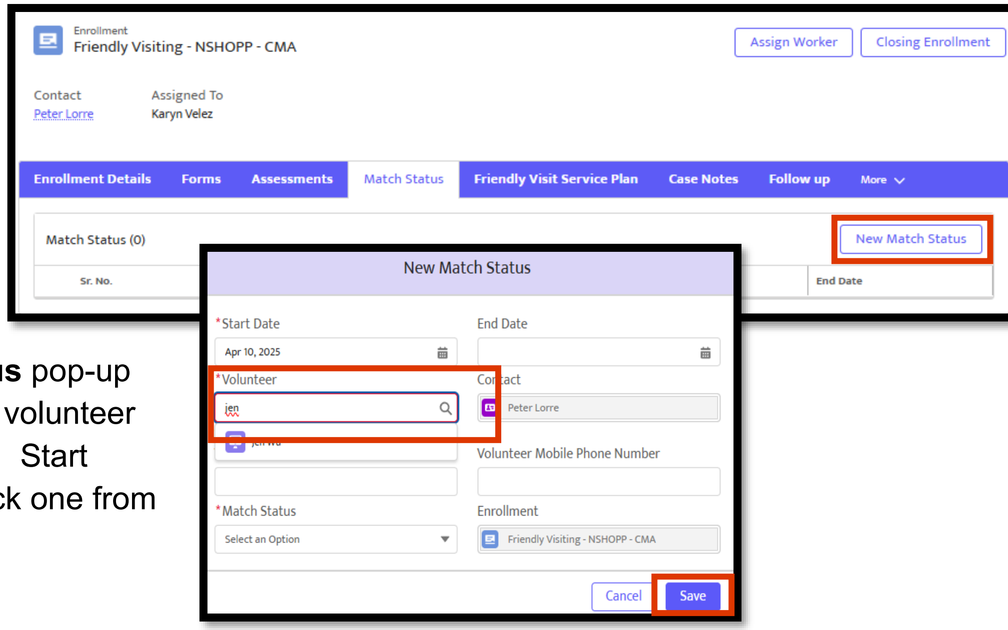
To create a match between an FV client and volunteer, a volunteer must be within the system. (See above for instructions on entering a volunteer.) Next, are the steps to create a match from the Client file.

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 **c**omplete the required fields. The volunteer field uses type-ahead technology. Start typing a volunteer's name and pick one from the list. Select **Save**.



Creating a Match – Volunteer Process

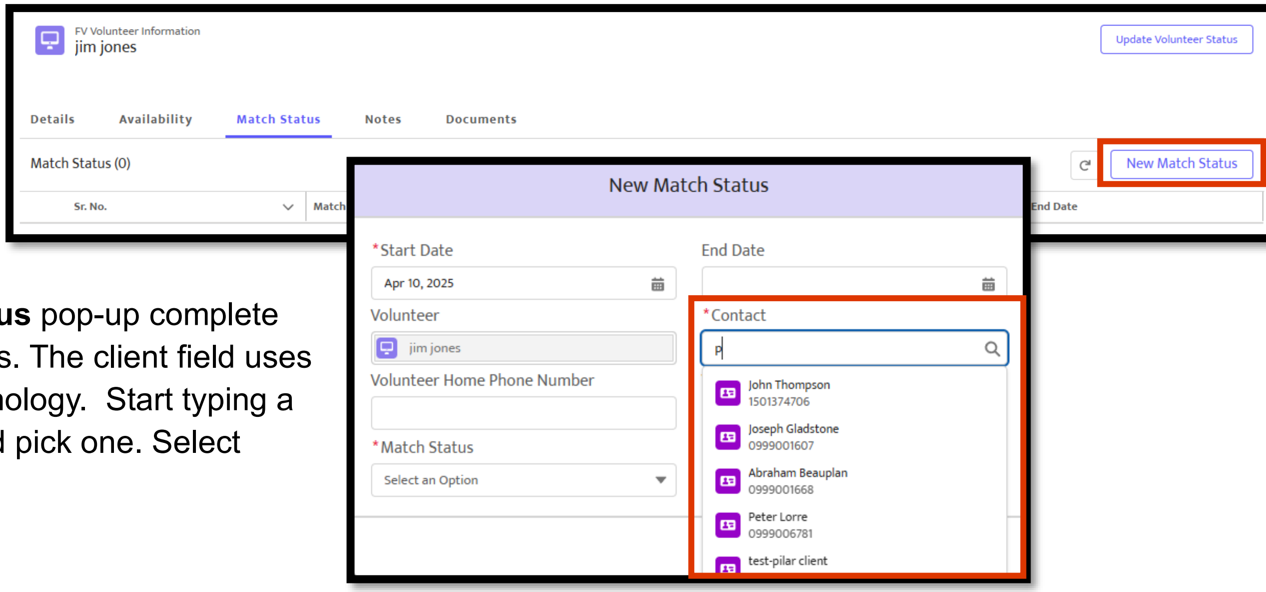
Similarly, a match can be created from a volunteer's details page.

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.

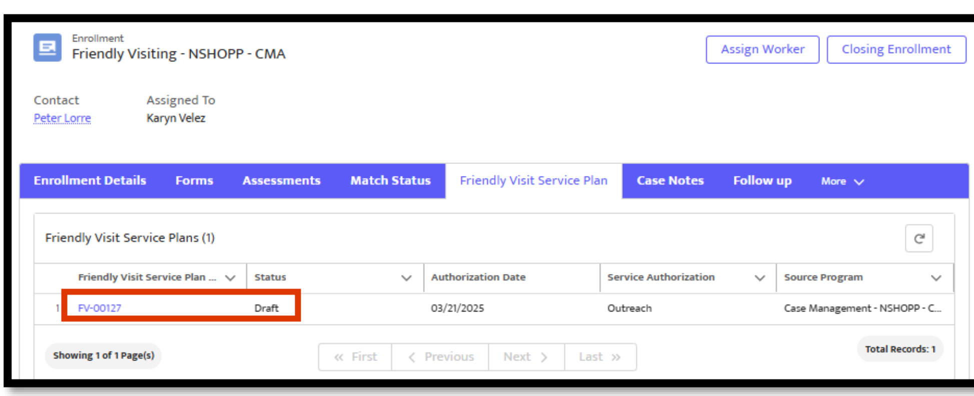
NOTE: *The original service plan is created by the referring Case Management Agency.*

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.

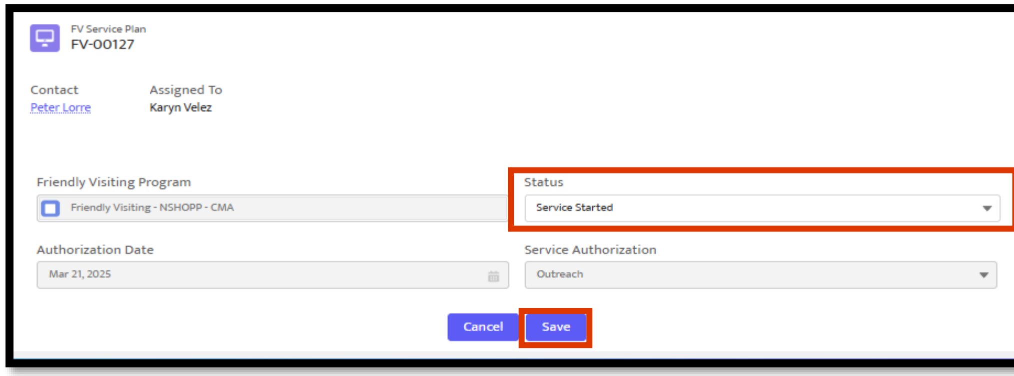
Step 2: From the **Details Menu**, click the **Enrollments** tab and click on an active enrollment name link.

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.



Closing the Friendly Visit Service Plan

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

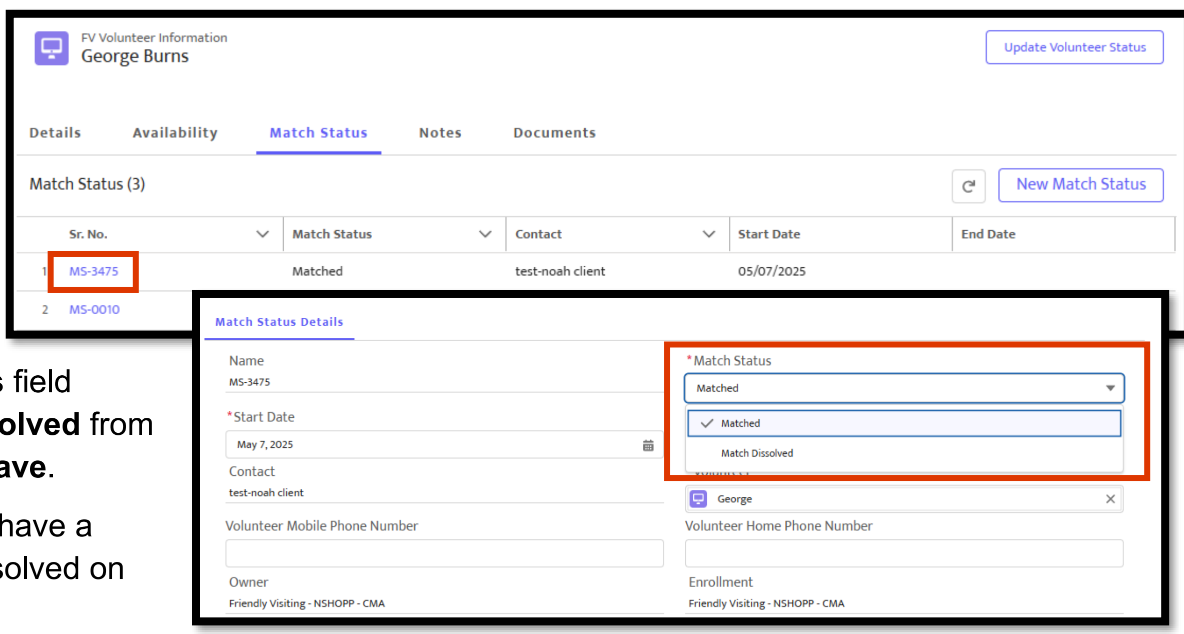
Dissolving Match Status

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.

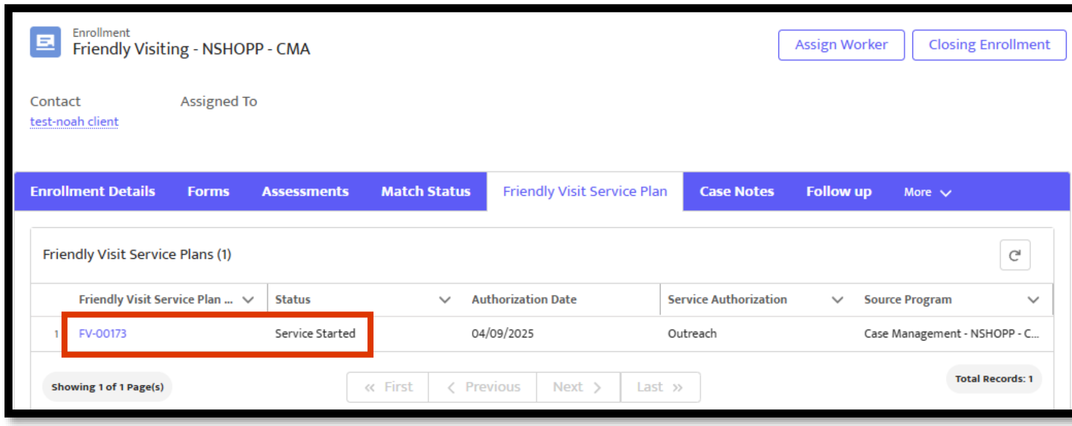


Closing the Service Plan

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

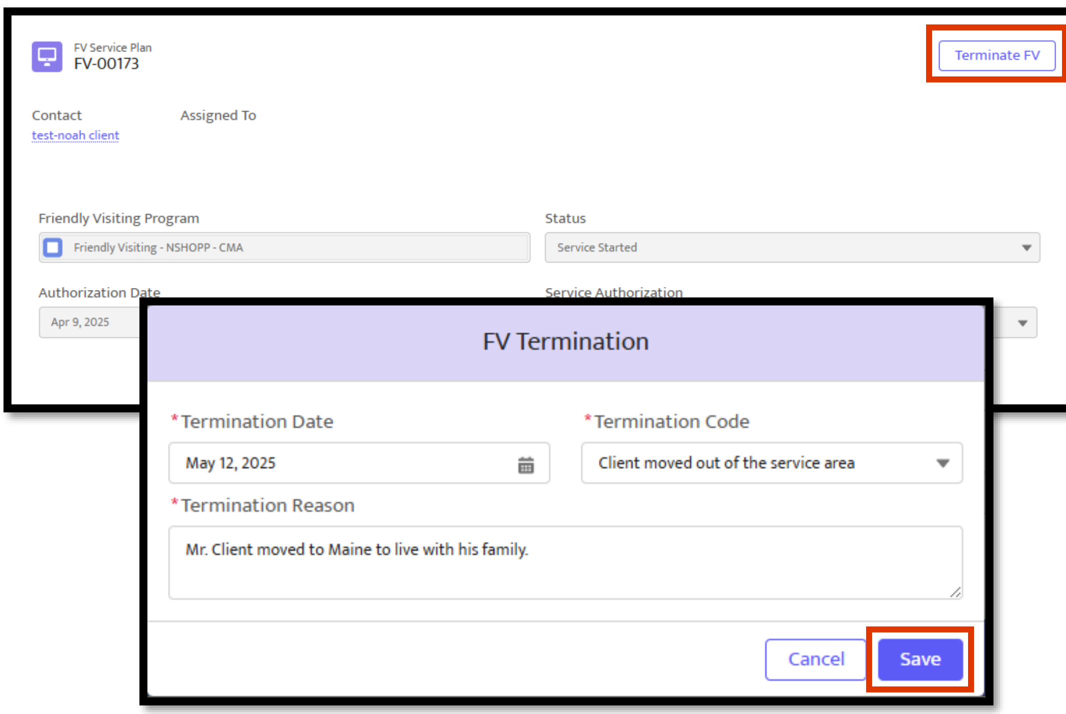
Step 2: From the **Details Menu**, click the **Enrollments** tab and click on an active enrollment name link.

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.



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

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.

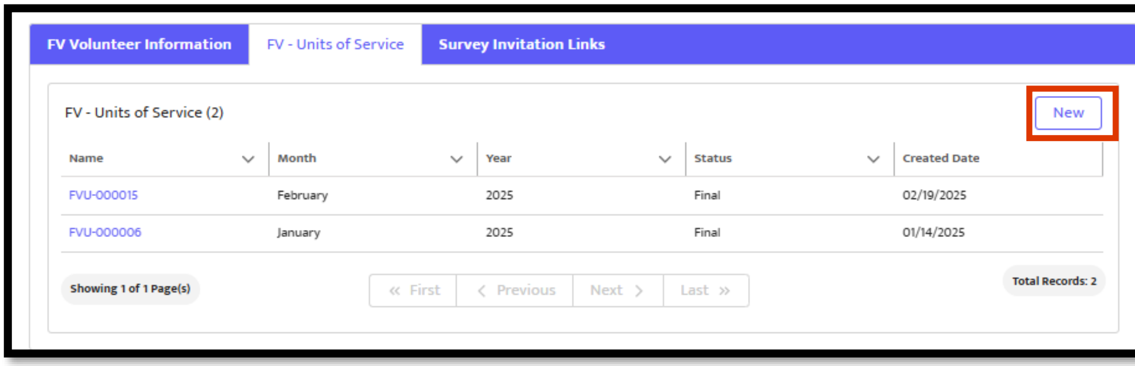
Friendly Visiting Volunteer Units of Service

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

Adding a New FV – Units of Service Record

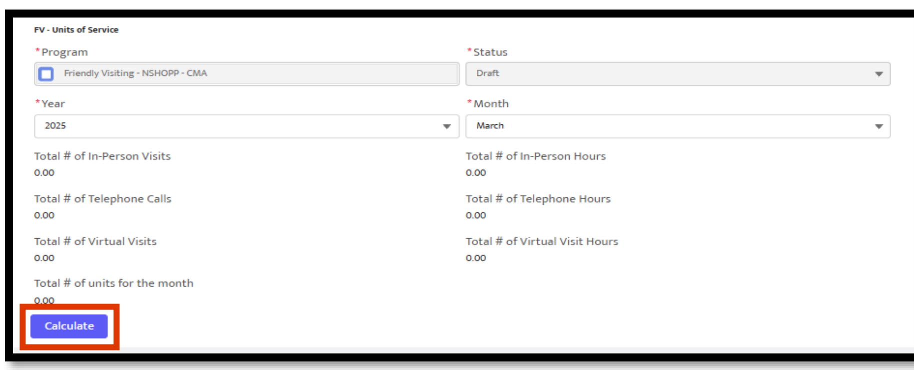
Step 1: From the **Top Menu** click **Program Tools**. Click on the **FV – Units of Service** tab. A List View displays the program's units of service records by month/year to date. Each record has a status of either **Draft** or **Final**.

Select **New**.



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

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

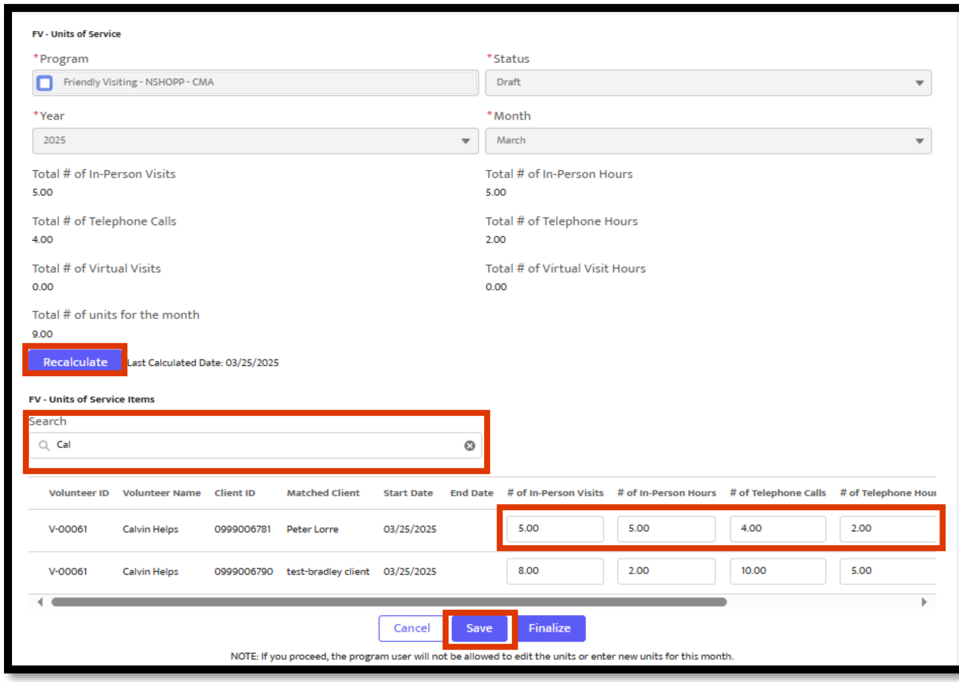


NOTE: *You cannot create a service form for a month or year that is in the future.*

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

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

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



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

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:

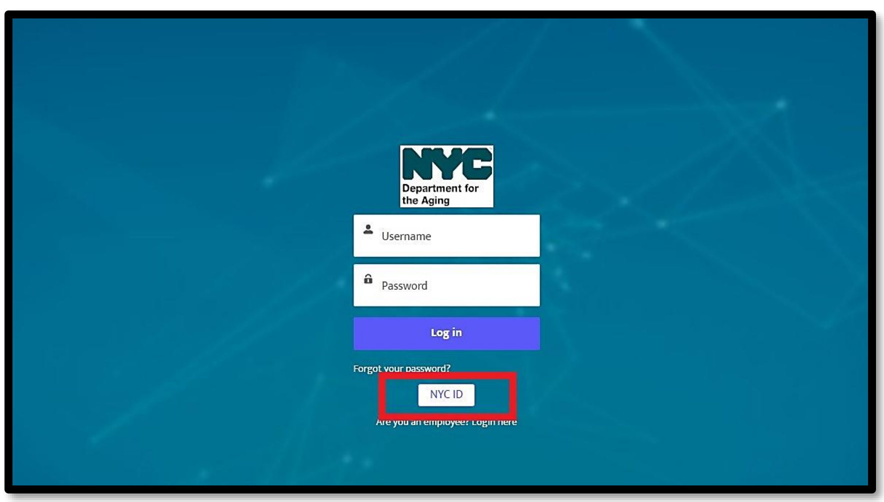
- **Logging into VIVÉ**
- **Accessing NYC.ID**

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.

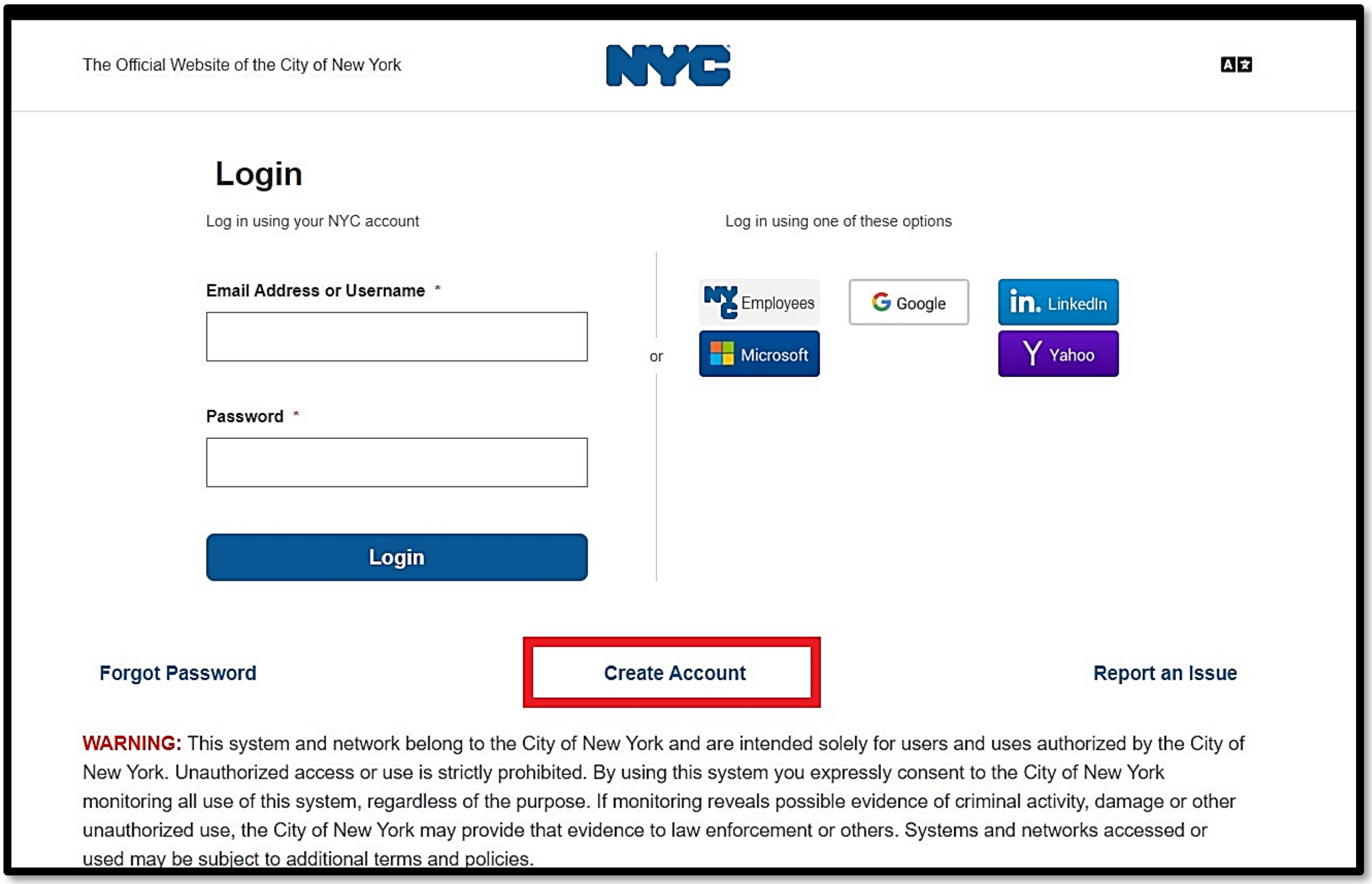
Note: *NYC.ID is different from an IDNYC. Don't have an NYC.ID? You must create an NYC.ID account to use VIVÉ.*



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:

- 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.



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

[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

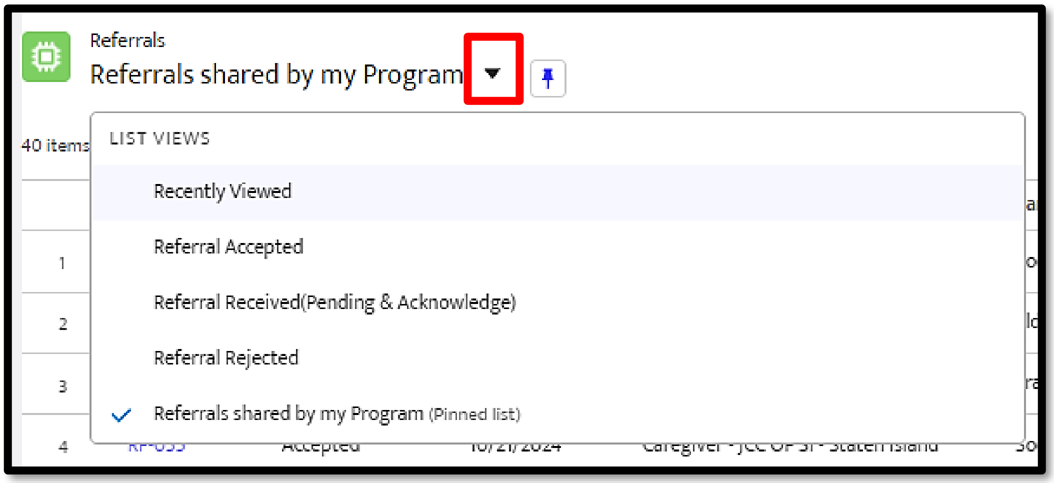
Overview of Referrals

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**.

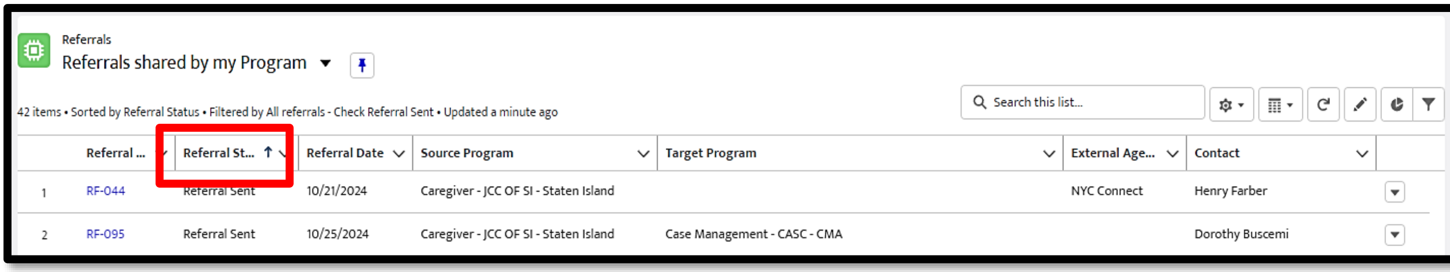
The Referral Queue displays referrals based upon status. You can pin your default view.



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.



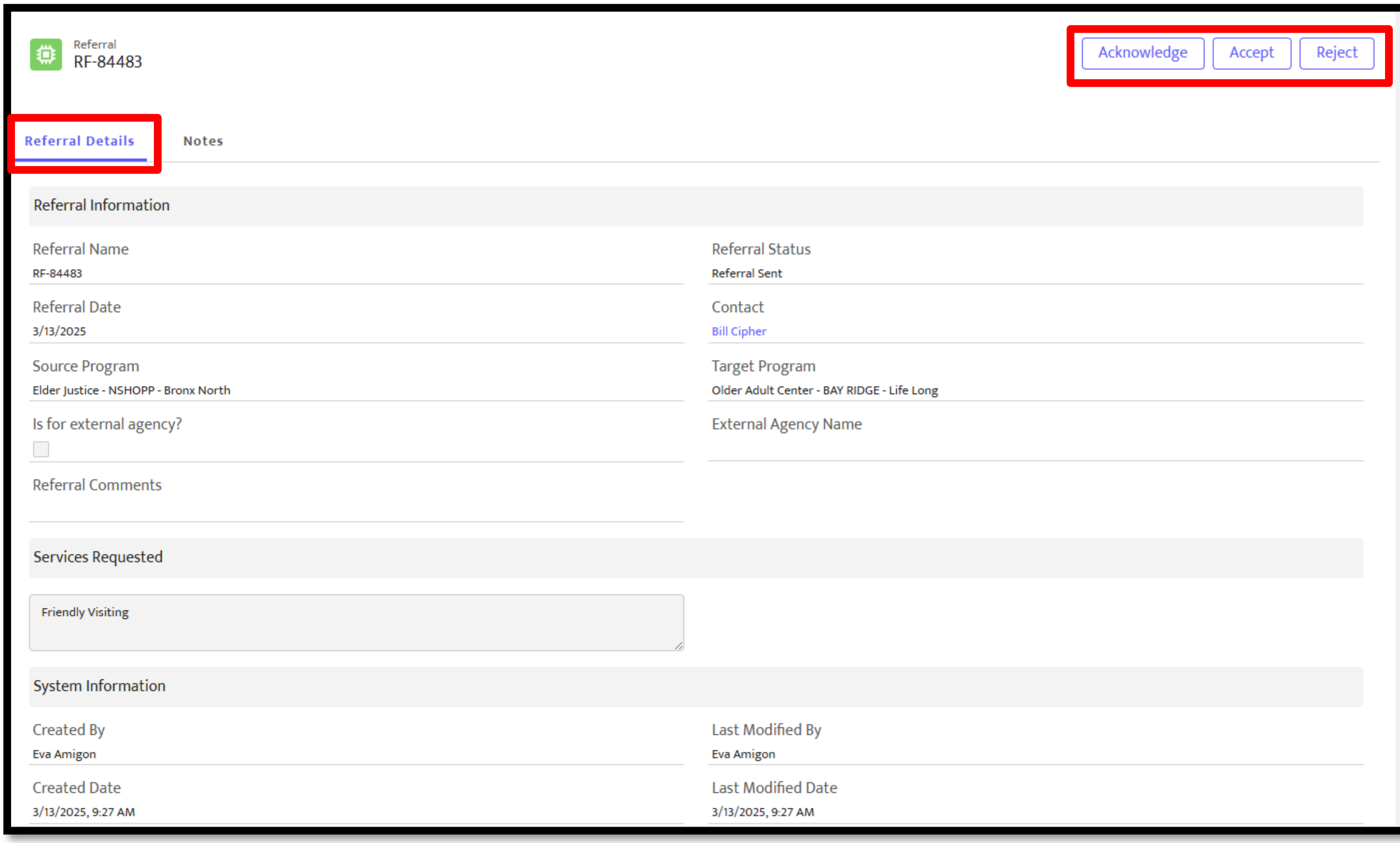
Referral Details

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

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

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

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

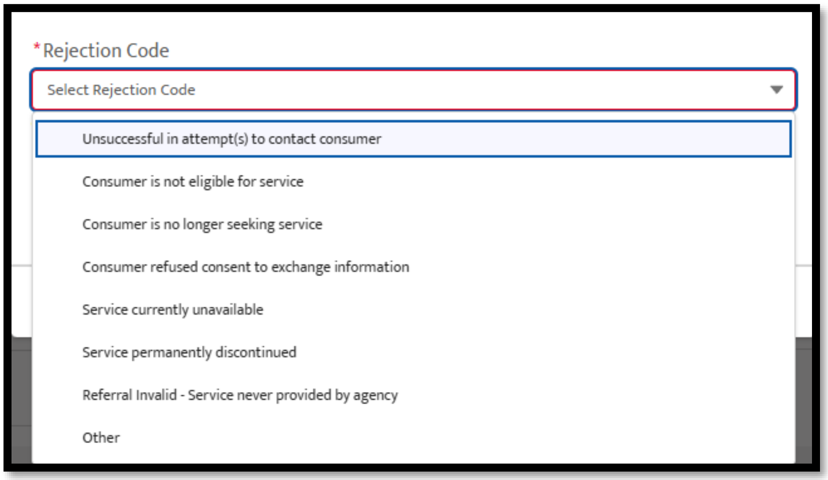


Accepting an Enrollment

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

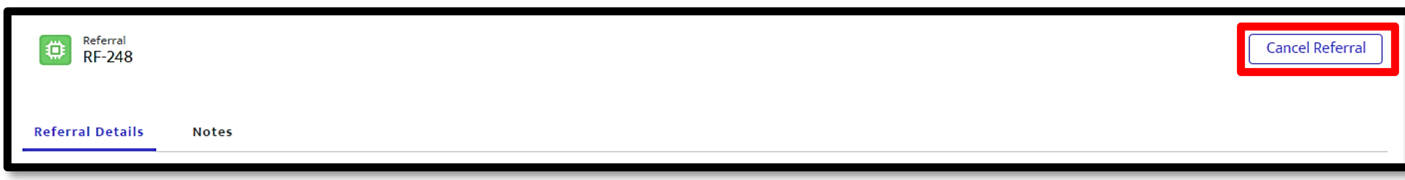
Rejecting an Enrollment

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



Cancelling a Referral

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



Referral Notes

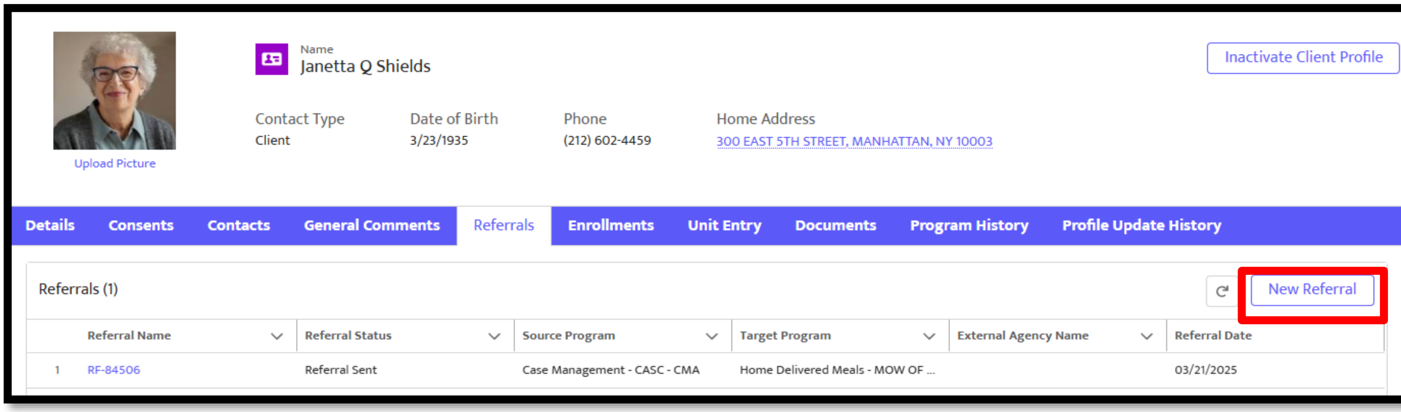
All referrals have a **Notes** tab. These notes are seen by both the source and target programs. A user may search and filter the notes of this specific referral.

Making a Referral

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

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

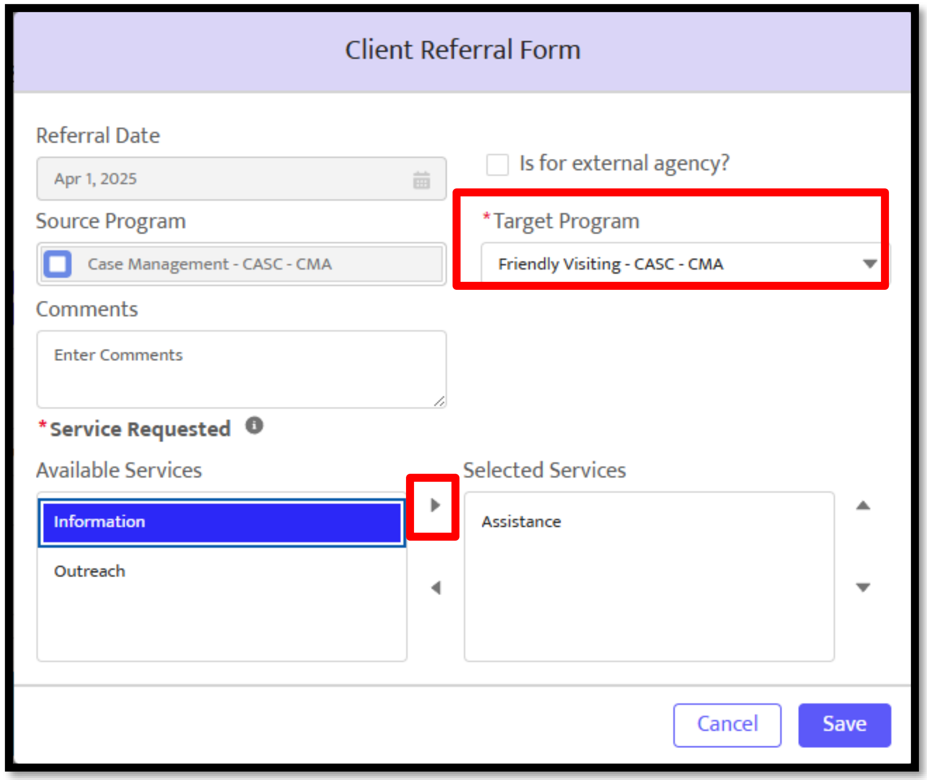
Step 2: Select the **New Referral** button.



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

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

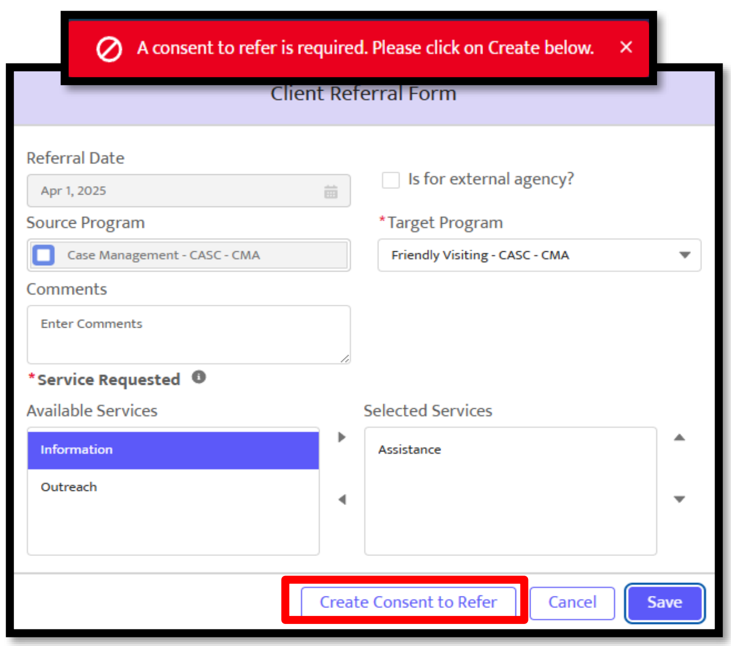
Step 5: Select **Save**.



Completing Consent to Refer

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

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



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

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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

- VIVÉ Knowledge Base contains reference guides, short videos and recorded 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

[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

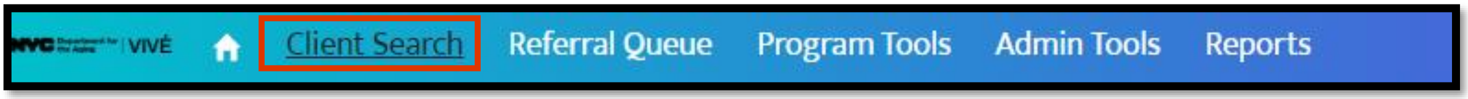
Client Search allows you to search for clients in VIVÉ. Starting with a client search is an important first step in preventing duplicate client records as well as inaccurate client data entry. VIVÉ offers several ways to search for clients, this guide will go over these different approaches and the next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

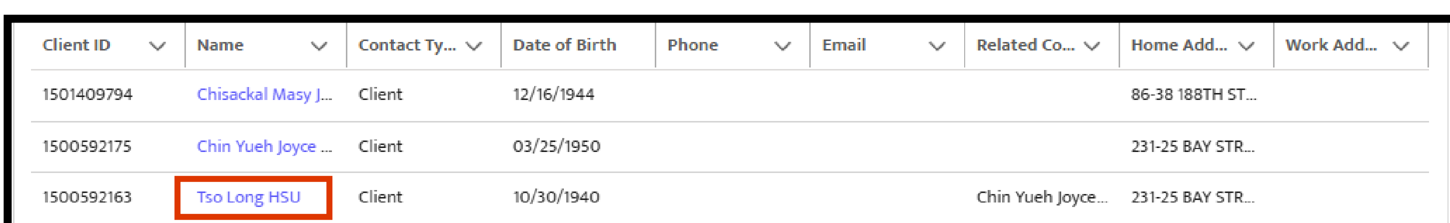


Indicate if you are searching for a Client, a Contact, or a Professional by checking the box.

To begin the client search you can either:

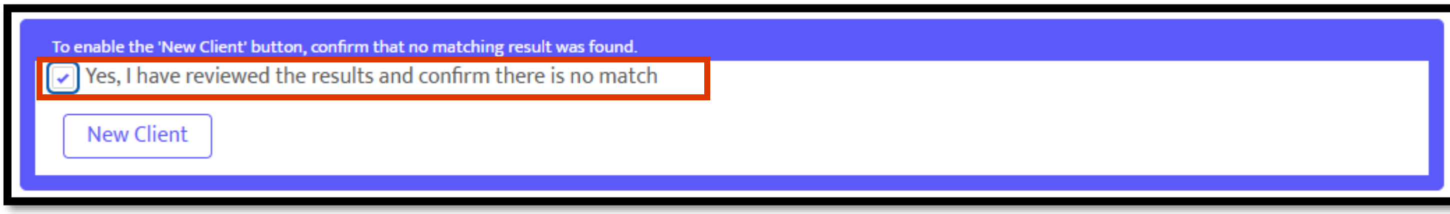
- Use intelligent search for the client by name:
  - You can enter first name within the last name field.
- You can enter a nickname. Entering Bob will find clients named Robert.
- Search for the person by their address:
  - Checking the **Search by address box** button and the address fields will appear.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

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



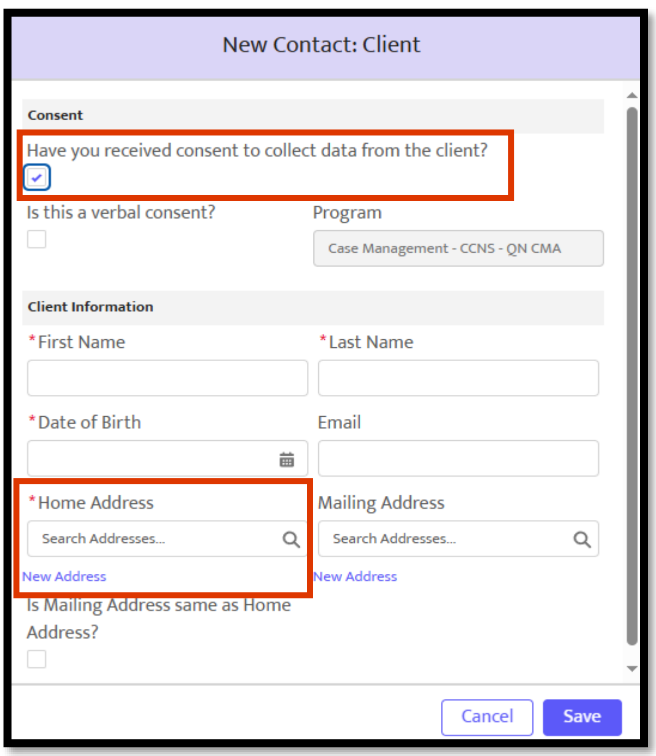
Client ID	Name	Contact Ty...	Date of Birth	Phone	Email	Related Co...	Home Add...	Work Add...
1501409794	Chisackal Masy J...	Client	12/16/1944				86-38 188TH ST...	
1500592175	Chin Yueh Joyce ...	Client	03/25/1950				231-25 BAY STR...	
1500592163	Tso Long HSU	Client	10/30/1940			Chin Yueh Joyce...	231-25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

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



New Client Entry

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



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

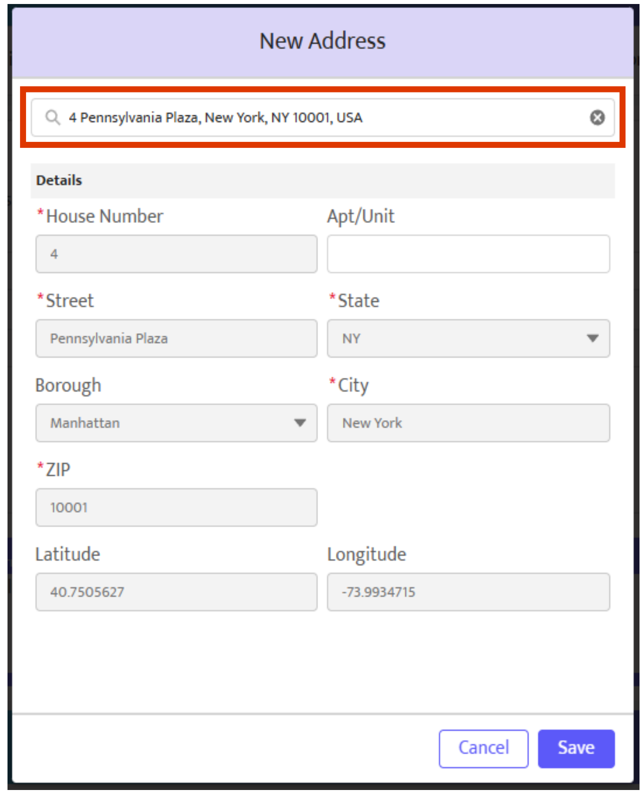
To find addresses, there is a search box for the Home Address. Enter an address and if it was previously entered,then you can select it. Please note the address including the apartment number must match.

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

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

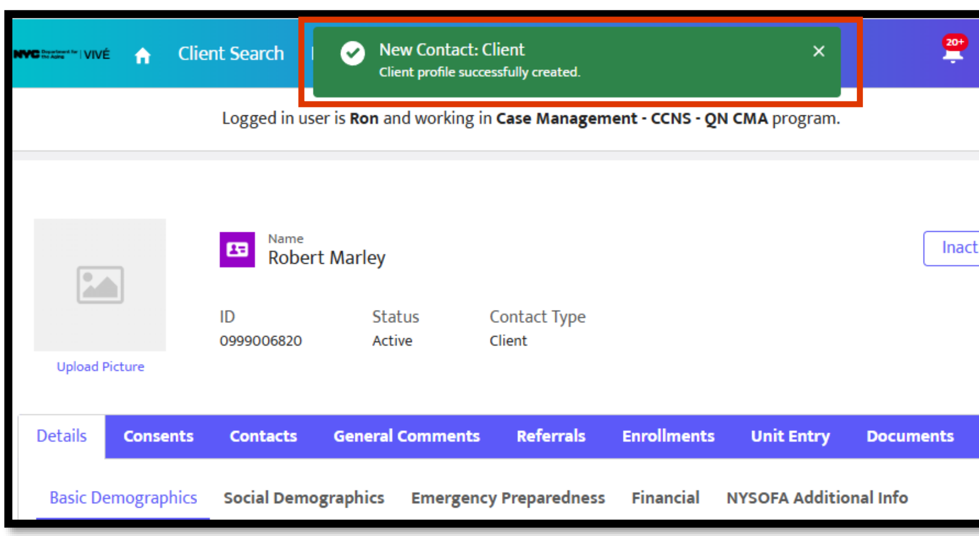
Once you've selected the address, the remaining fields will be populated. **You will need to add the Apt/Unit field.**

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



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

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



Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

Return to VIVÉ Knowledge Base

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.

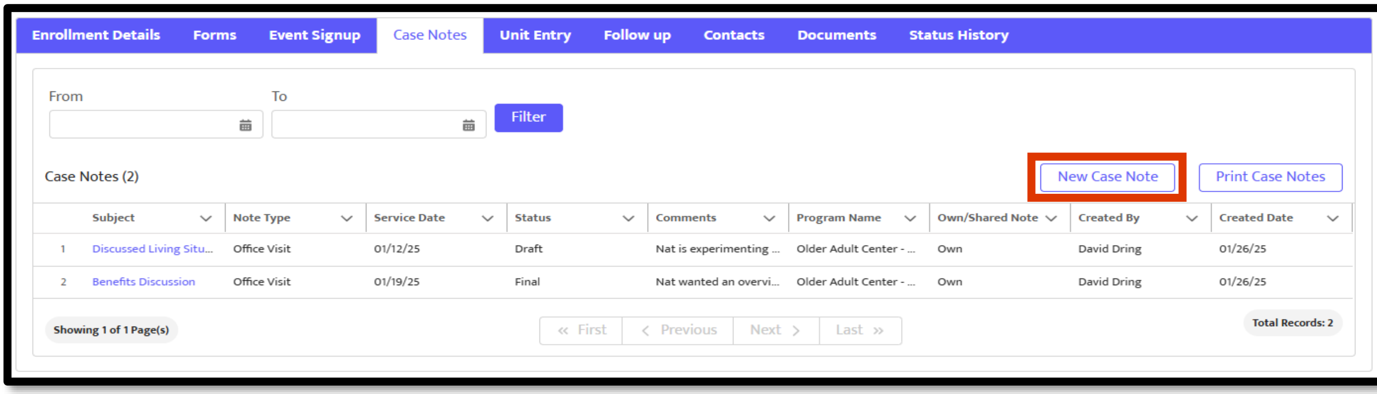
> ***TIP**: Be considerate and careful when writing case notes. They are legal documentation, which maybe reviewed during audits, assessments, and legal proceedings.*

Entering Case Notes

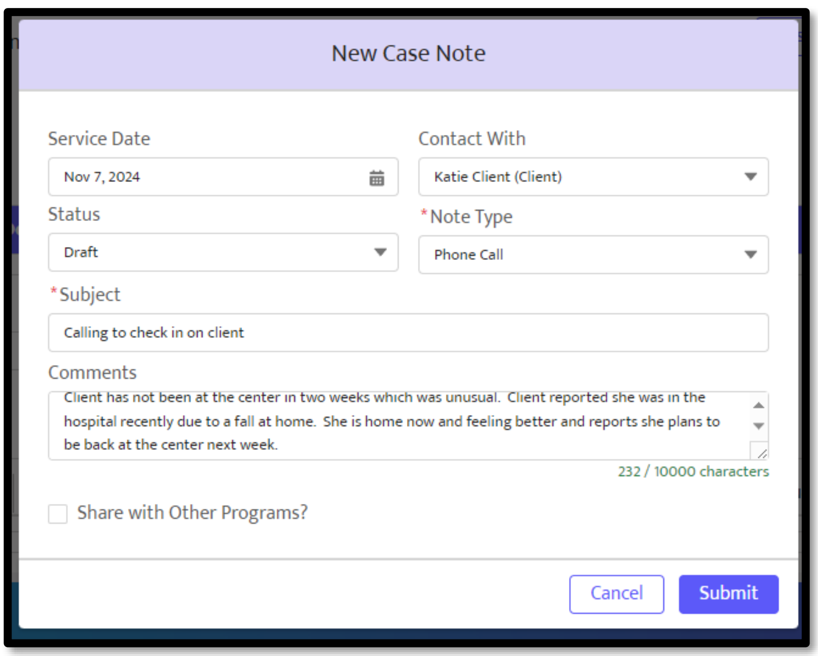
Step 1: From the **Top Menu**, click **Client Search**, find the desired client and click on their name link.

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

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



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



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

Select **Submit** to save the note.

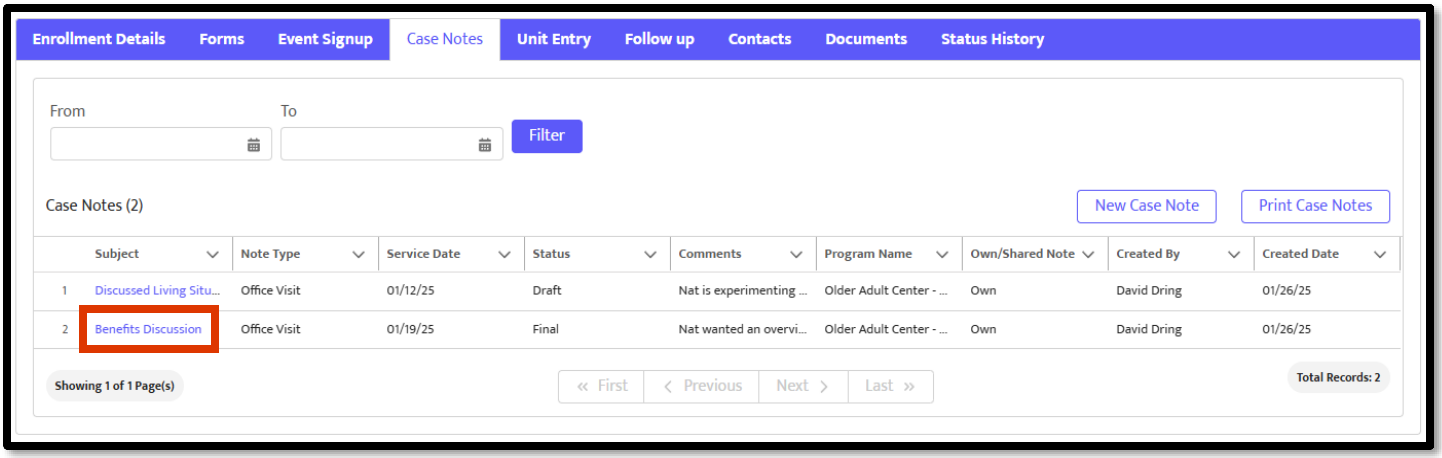
TIP: *The system will become inactive, and you could lose your work, if you do not click/type for 20 minutes. Clicking or typing within the text area within that 20 minutes will start the clock over.*

Editing Case Notes

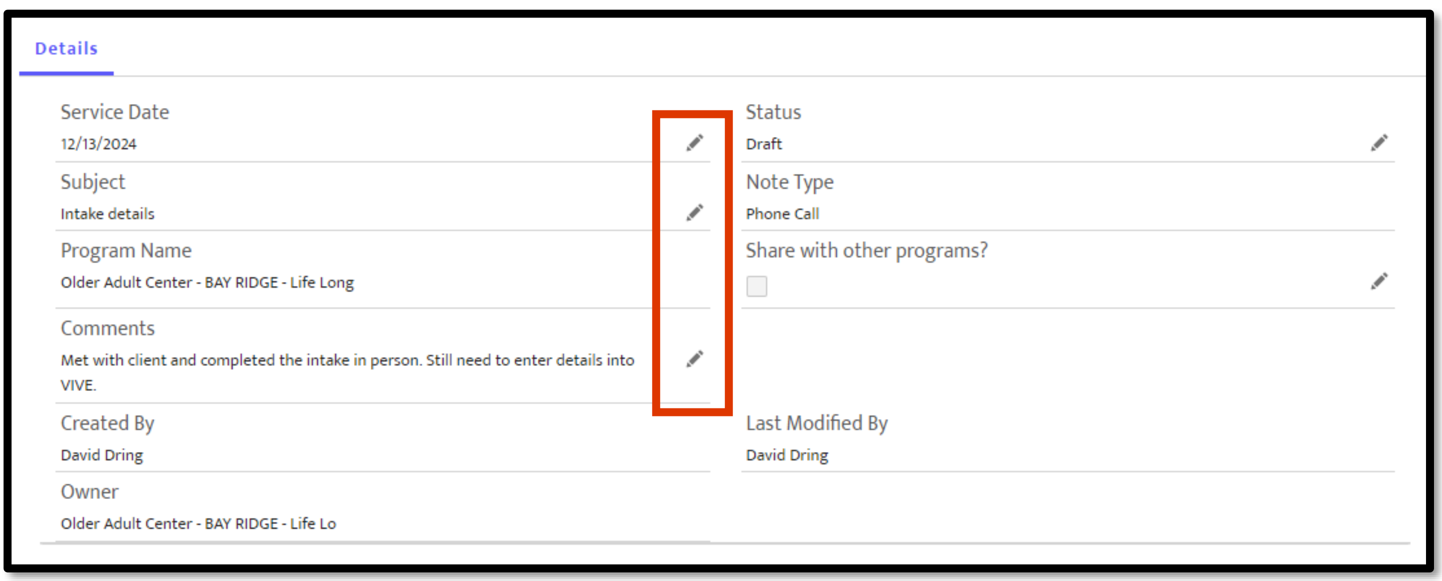
Step 1: From the **Details** menu, click on the **Enrollment** tab and your program enrollment link.

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

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



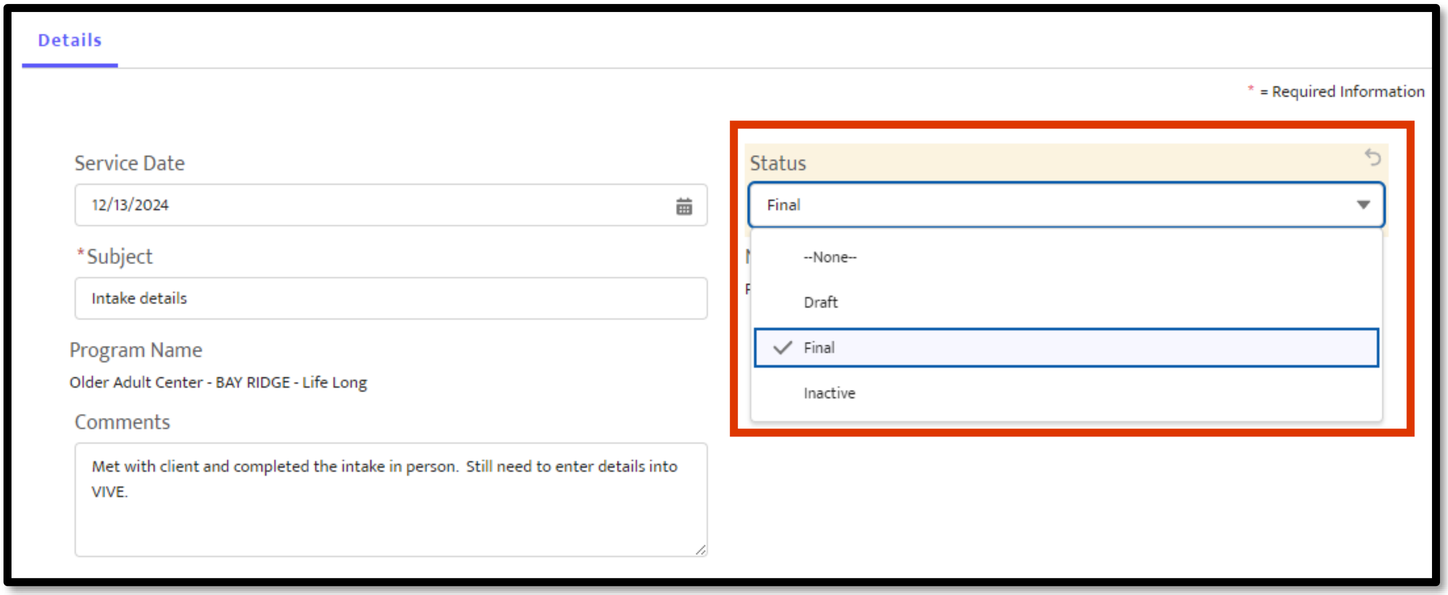
Step 4: Click on the pencils within the **Case Note** details to edit the fields. Once finished select **Save** located at the bottom of the form.



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

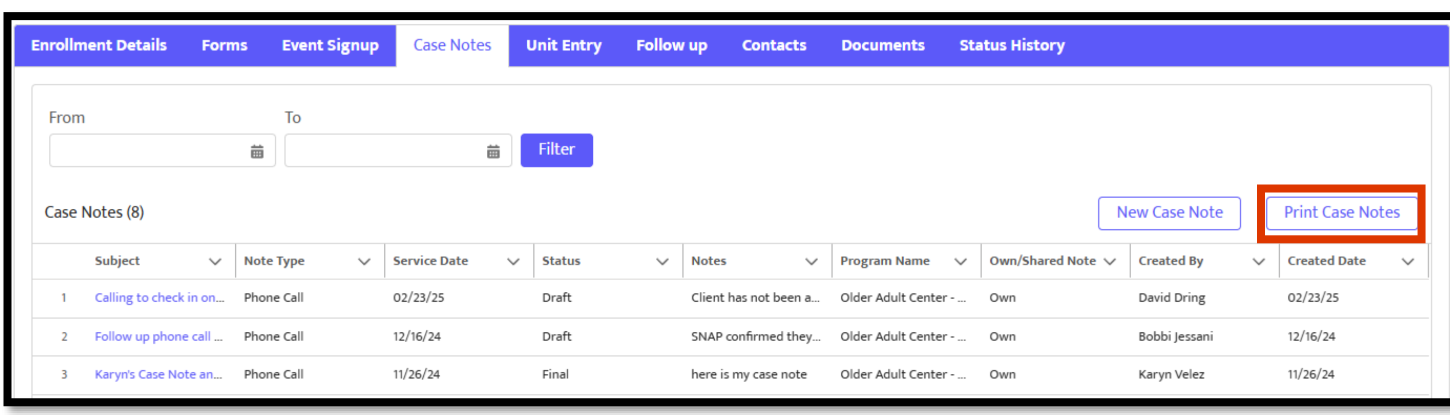
Finalizing Case Notes

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



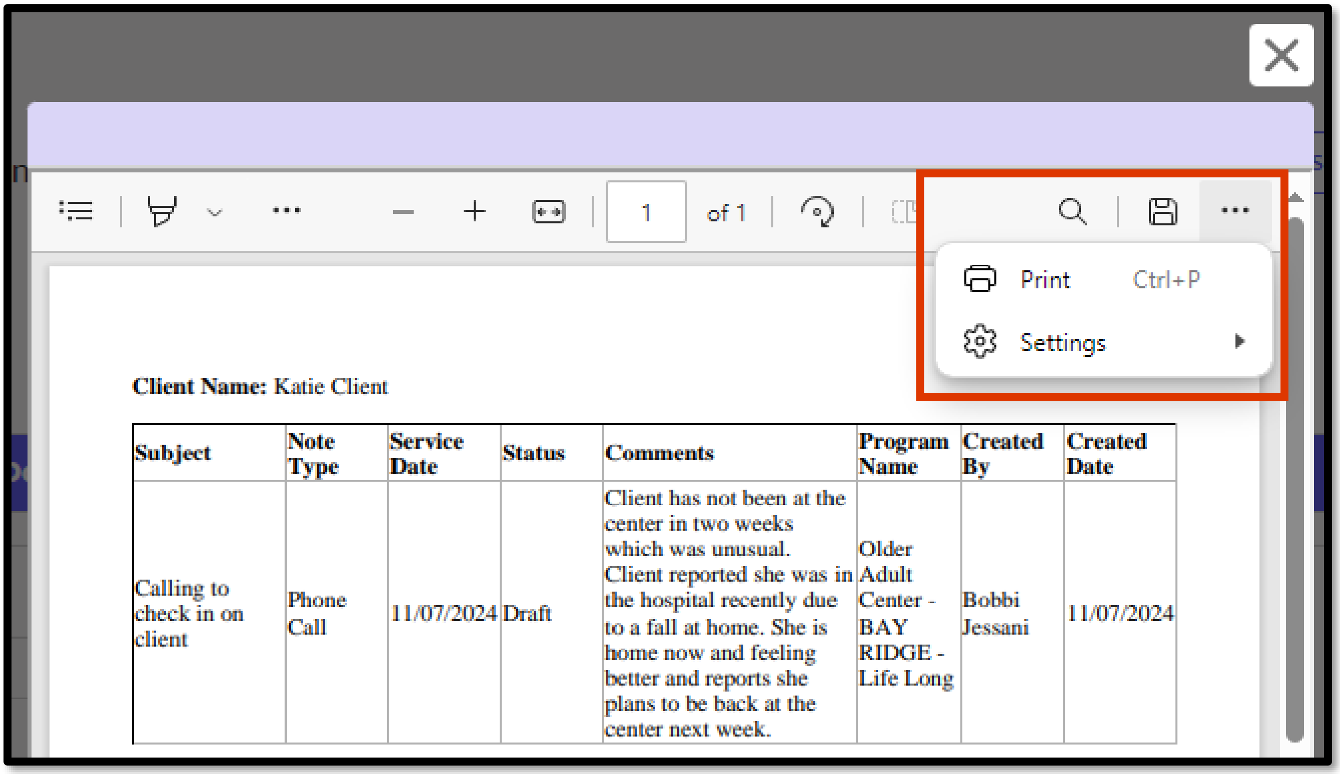
Printing Case Notes

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



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

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

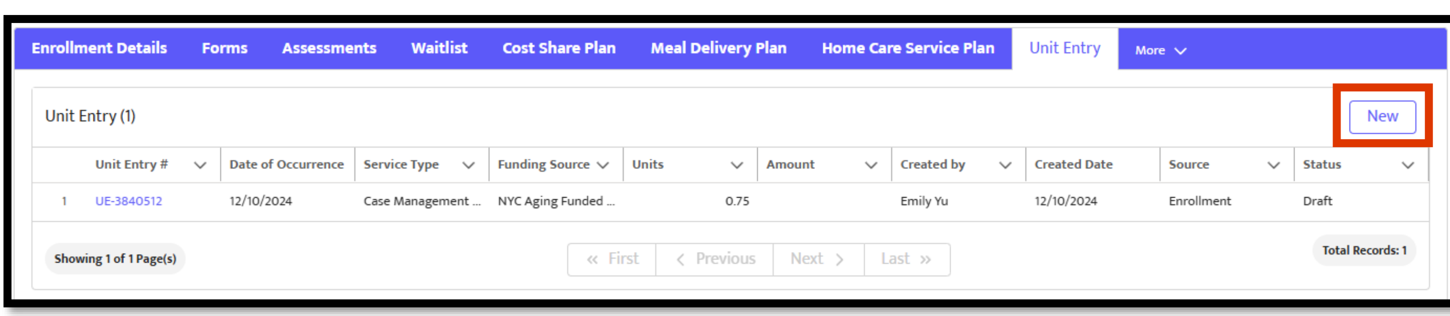


Linking Case Notes to Units

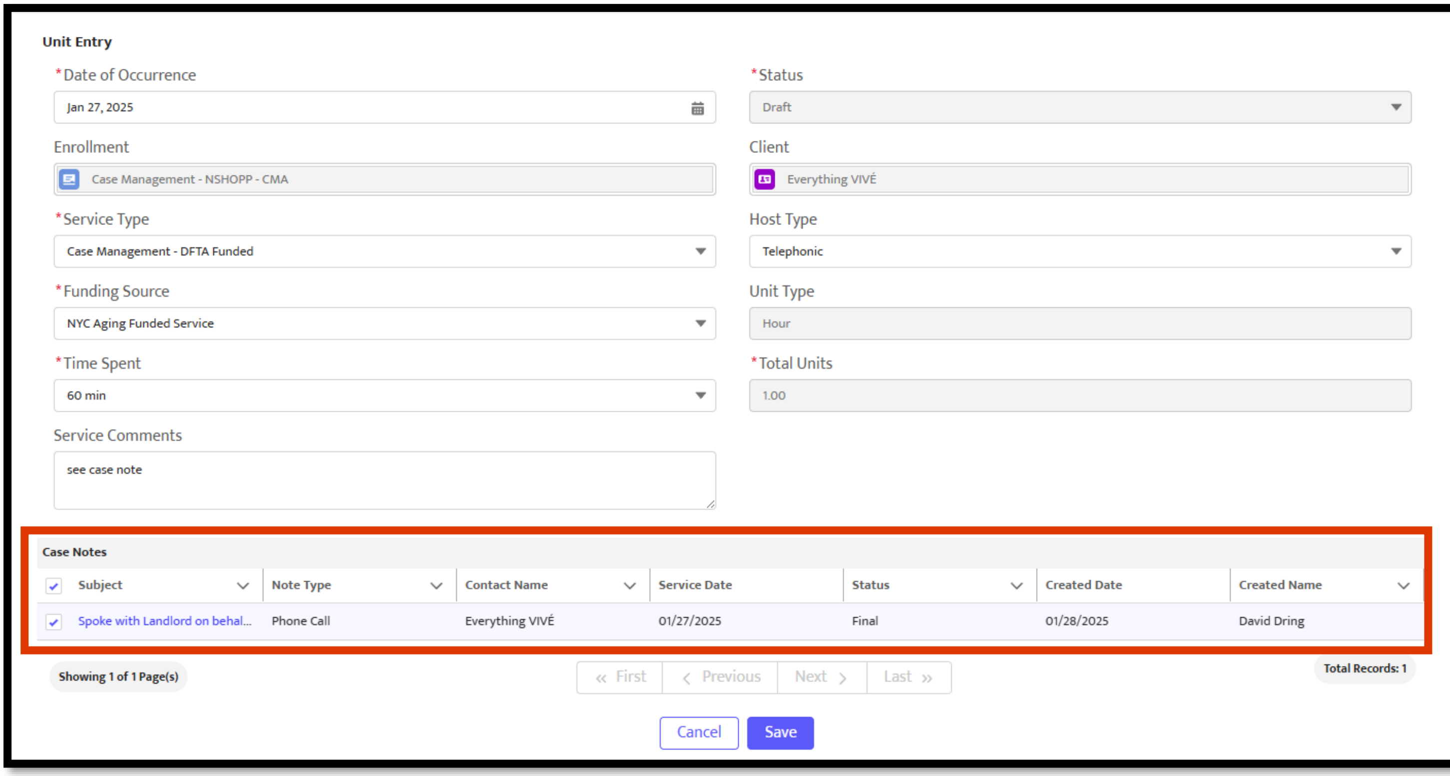
For those programs where it applies, case notes can be attached to units to track agency activities. At the bottom of the **Unit Entry** form, there is a list of the finalized case notes.

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

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



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.



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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 inancial information, and inactivating clients that are addressed in the Case Management reference guide.

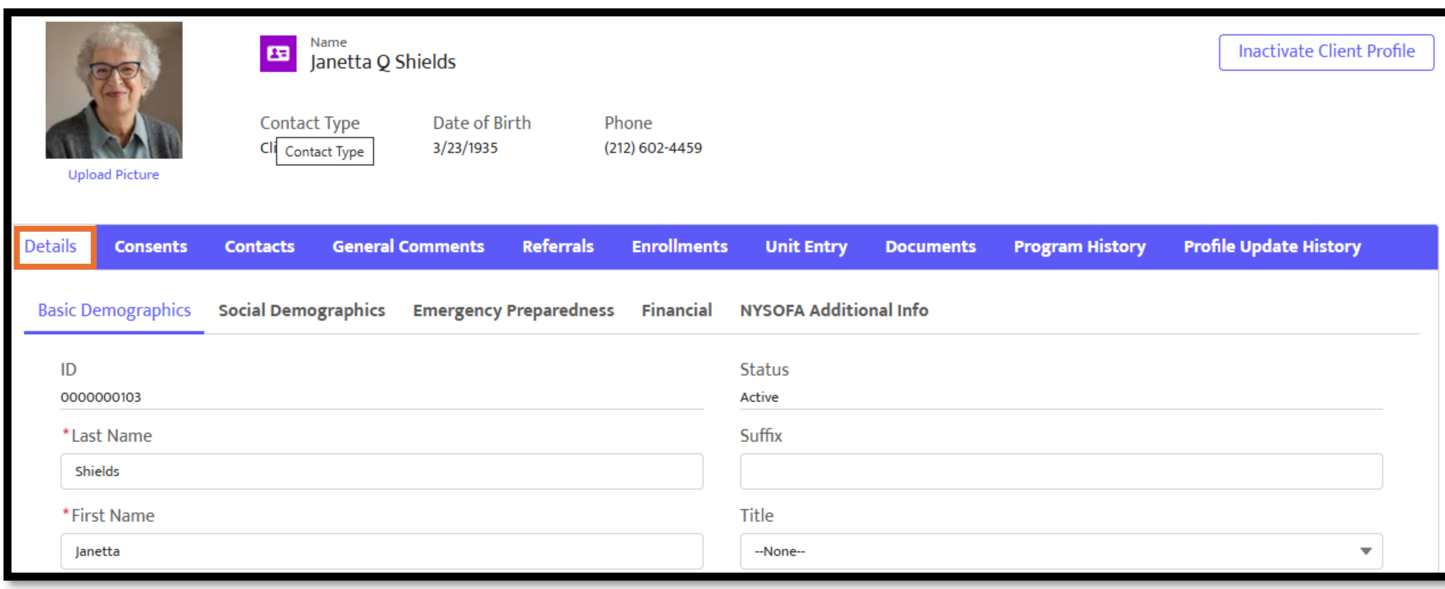
Client Profile Overview

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.



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

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

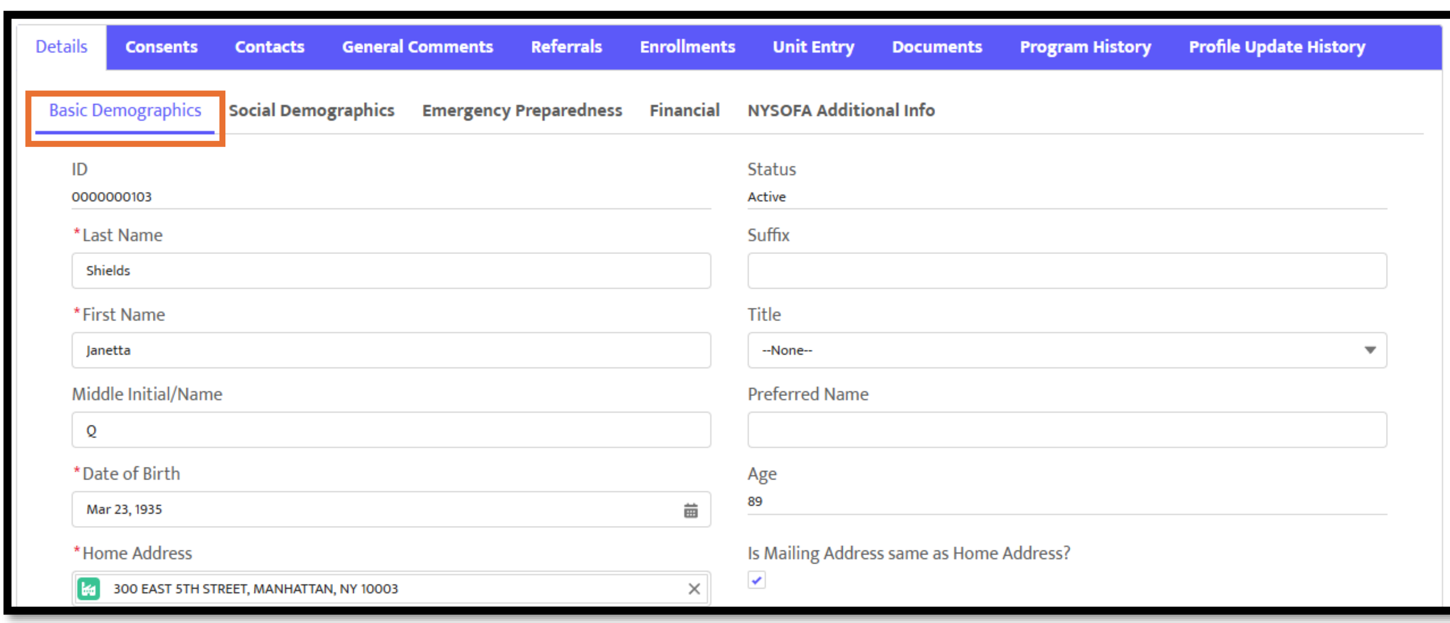
- General Comments – a place to make general comments; these are not case notes.
- Referrals – where to view and make client referrals.
- Enrollments – where to enroll a client into your program, view active and inactive enrollments and manage the client's engagement with your program.
- Unit Entry –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

Details Tab

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

Sub-Details: Basic Demographics

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

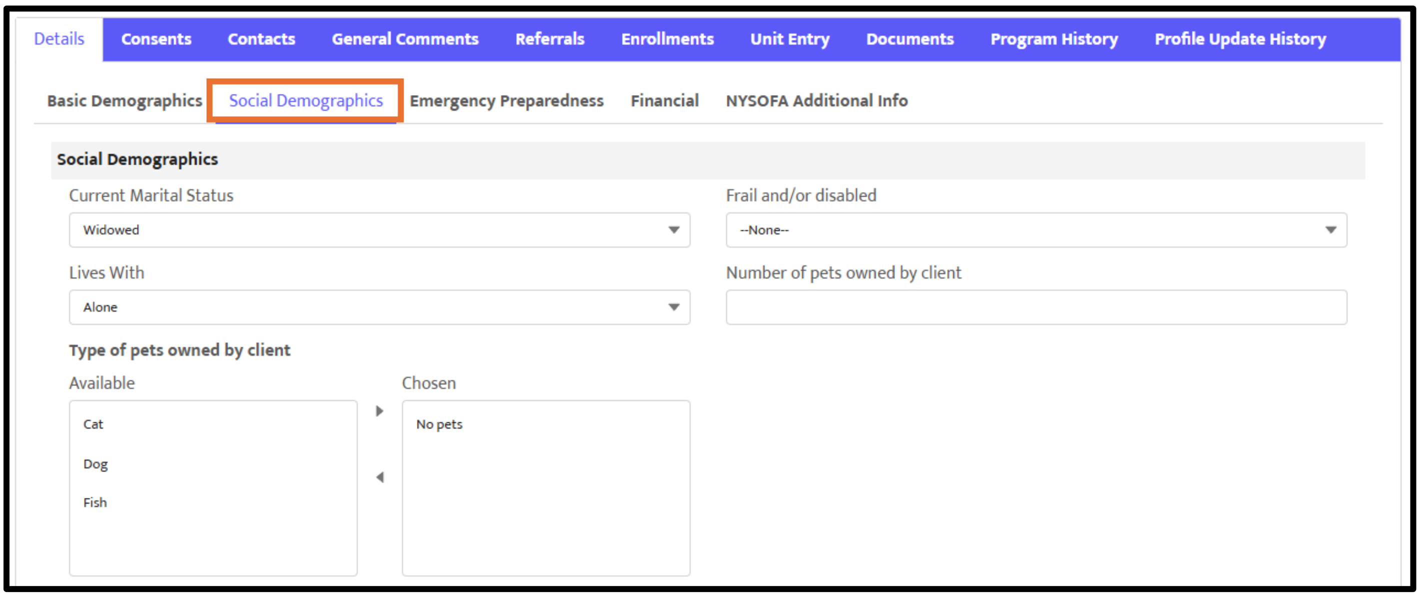


At the bottom of the **Basic Demographics** page there is the **Edit** button (or **Save** if in editing mode) and the **QR Code**. (For more information on QR Codes)

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

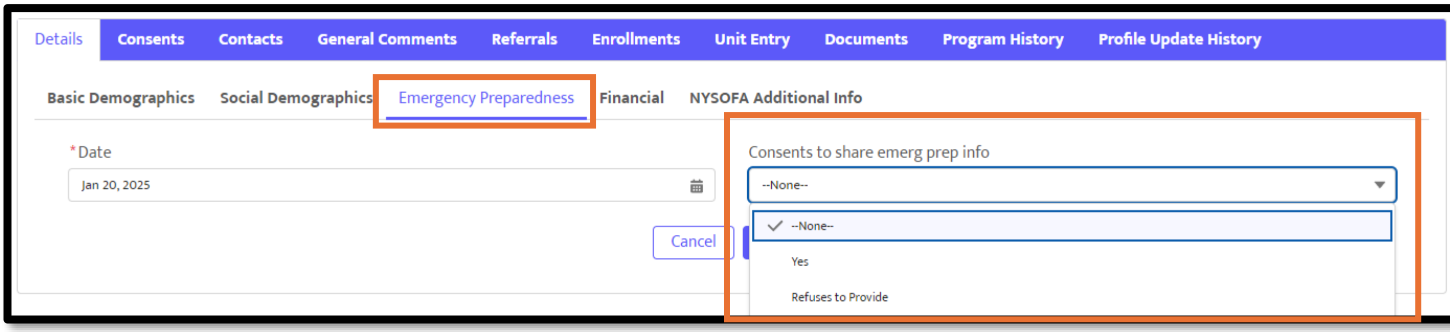
Sub-Details: Social Demographics

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



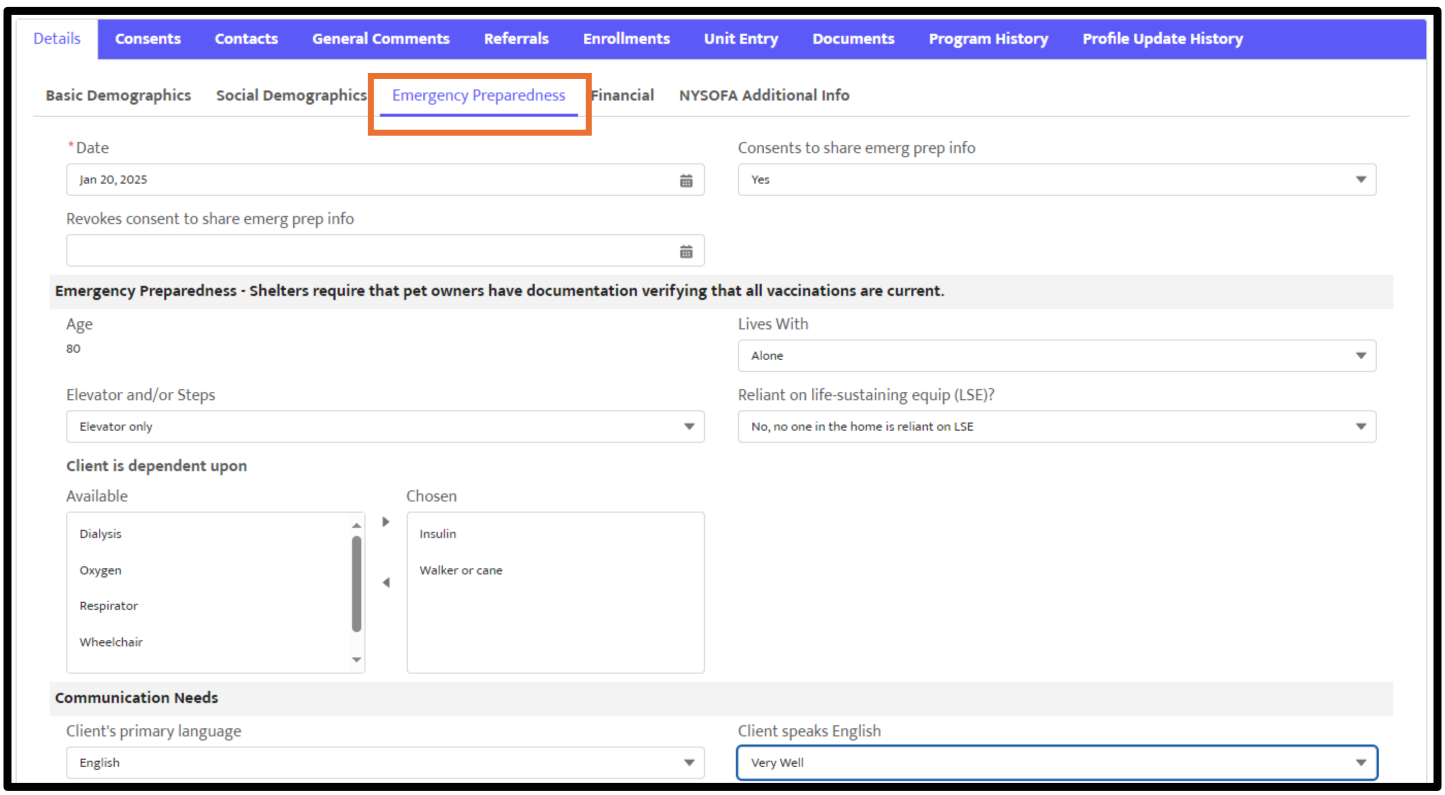
Sub-Details: Emergency Preparedness

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



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

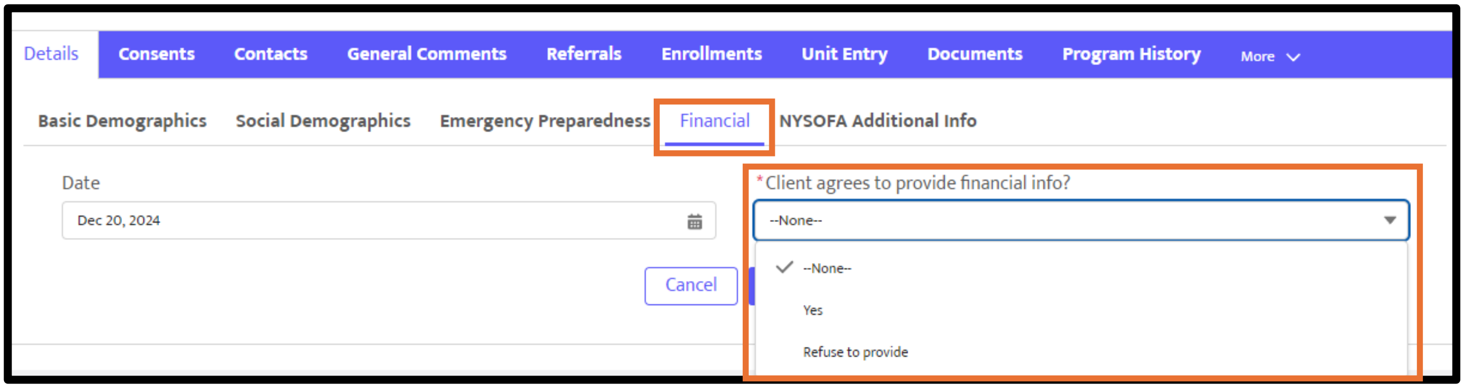
There are several different types of data entry field types. Some are calendar pick lists, dropdown menus, as well as the option to select and move one or more items from the Available box to the Chosen box. Once finished, select the **Save** button at the bottom of the page.



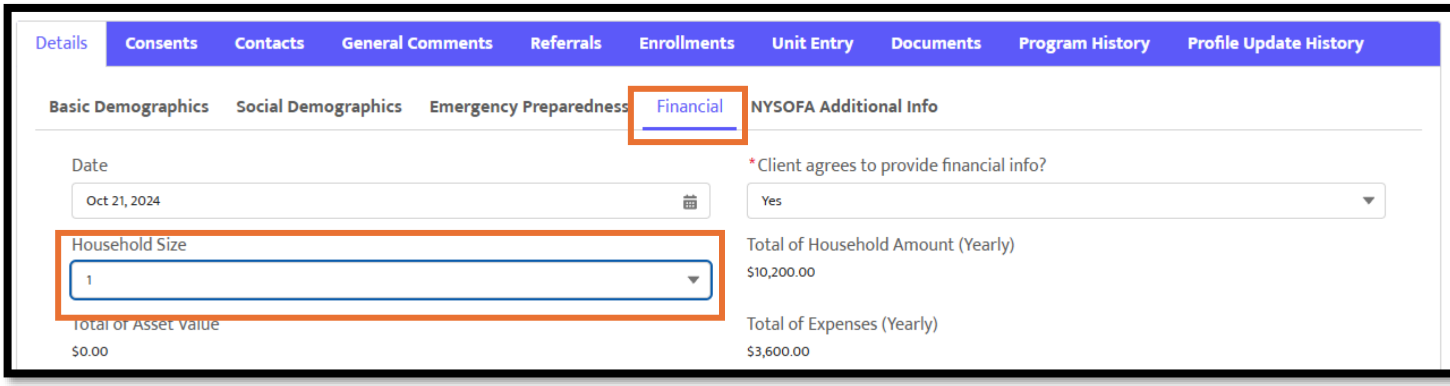
Sub-Details: Financial

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

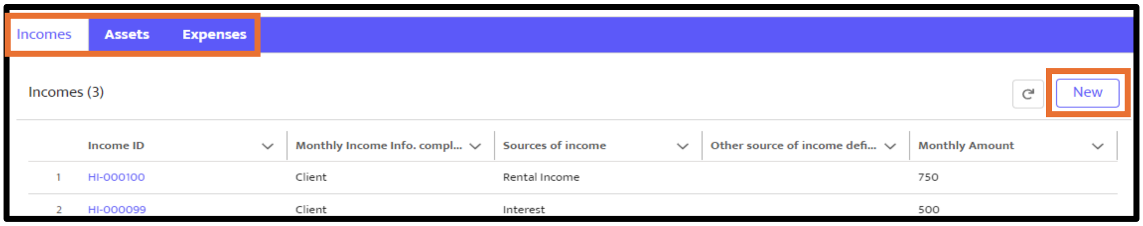
If the client agrees to provide financial information, select the **Edit** button to review the options in the drop-down menu. Select "Yes" client agrees and then select the **Save** button.



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

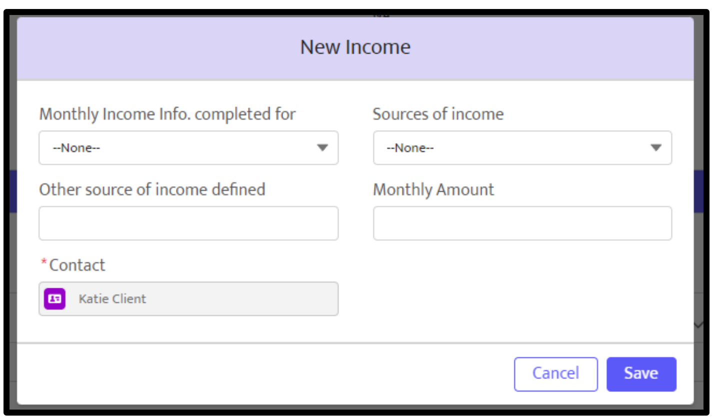


At the bottom of the page, there are three tabs: Income, Assets, and Expenses.



To Enter Income

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



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

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

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

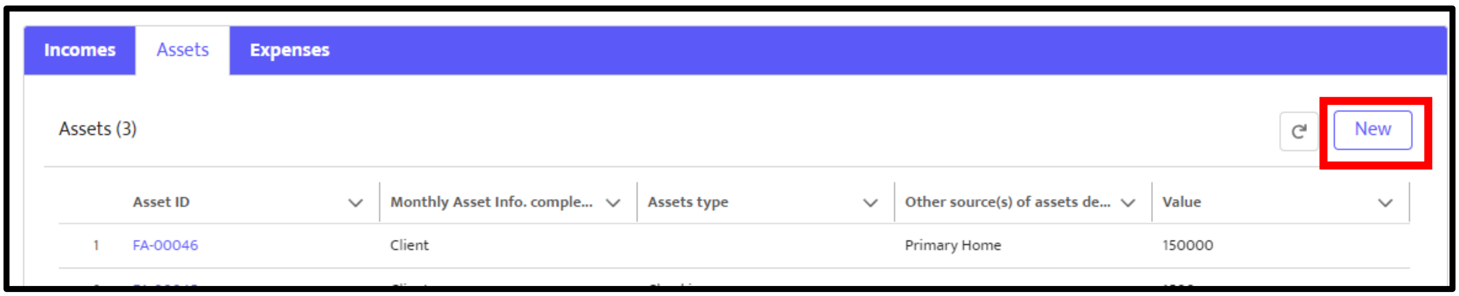
At the top of the page, there is a summary of the household size, total annual income, total assets and total expenses. If you want to see the Poverty Levels chart, click the hyperlink underneath the **Poverty Level PDF** label.

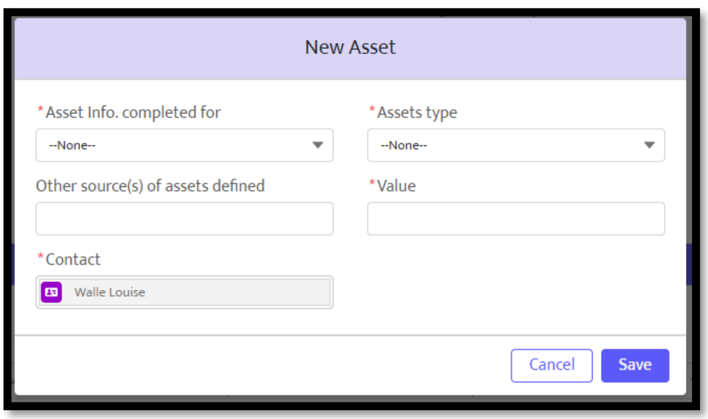
To edit any of these details, click the **Income** tab then select the link for a source of income. That brings you to the details for that income source, those details can be edited by clicking any of the pencils. Select **Save** when finished and **Exit** to return to the top of the page.

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

To Enter Assets

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



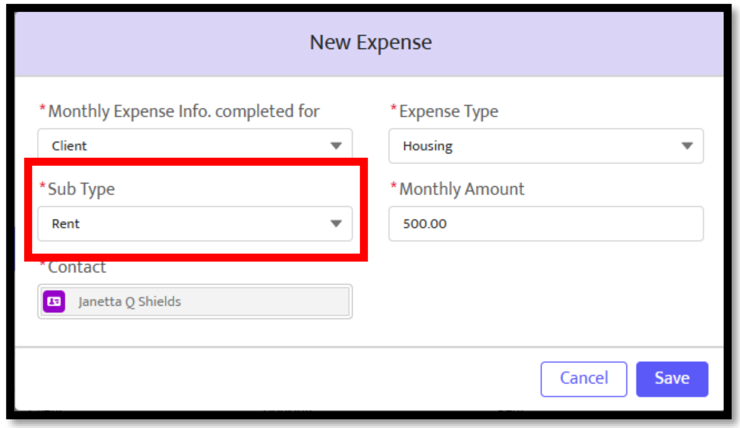


The **New Asset** pop-up identifies the owner of the asset, its type and value.

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

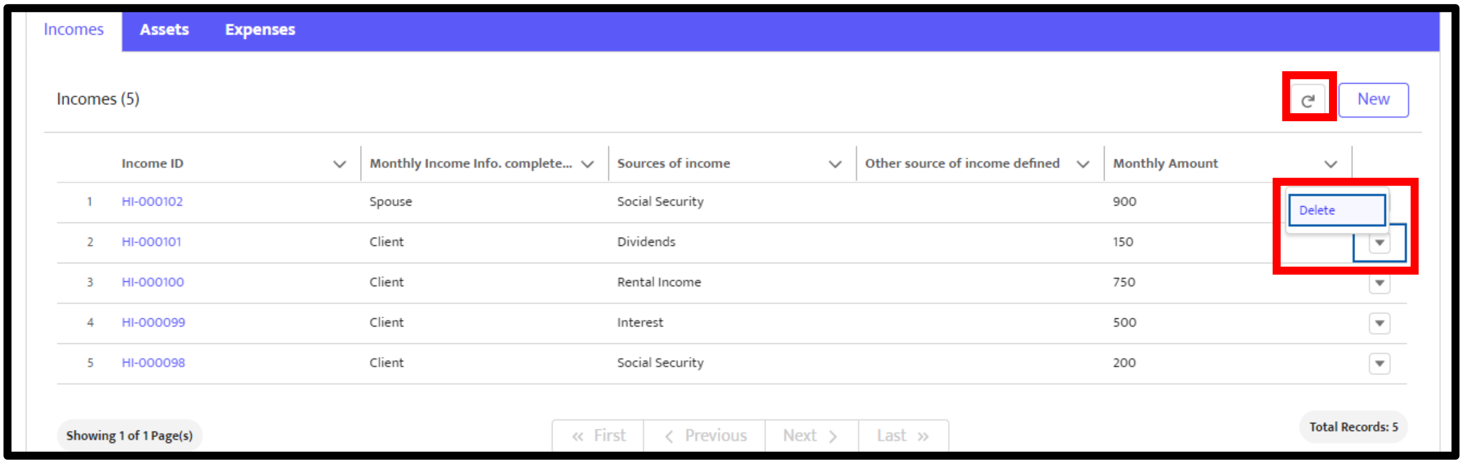
To Enter Expenses

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



To Delete Financial Information

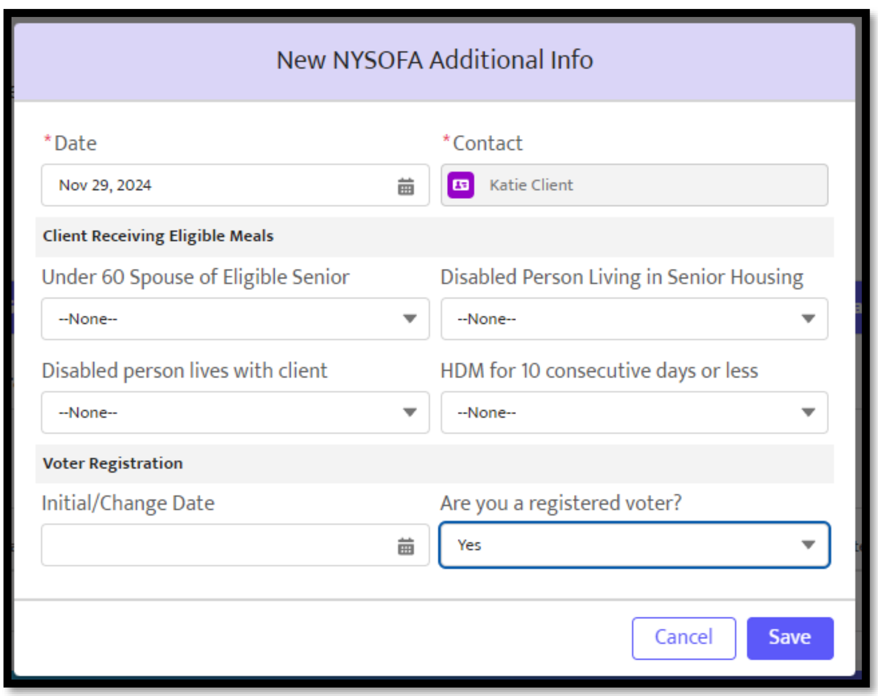
If you need to delete financial information for a client, whether it's income, assets, or expenses you can do so by clicking the down arrow on the righthand side of that row and selecting **Delete**. You may need to select **Refresh** on your screen to see that change.



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

Sub-Details: NYSOFA Additional Information

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



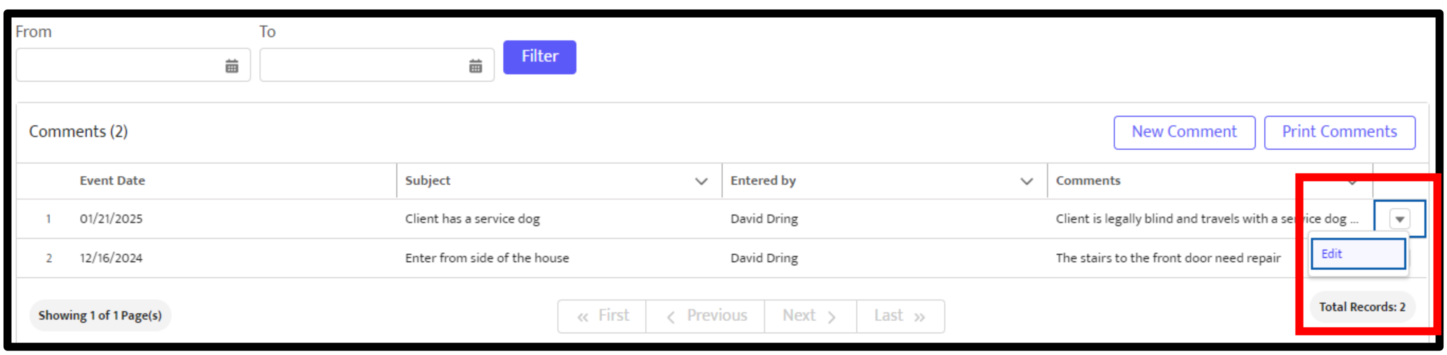
- When finished select **Save**. This will bring you back to the list view of **NYSOFA** information.
- If you need to edit previously entered **NYSOFA** Information, click the hyperlink in the ID column to open the **NYSOFA** screen, select the **Edit** button to make the changes. When you are finished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

General Comments Tab

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

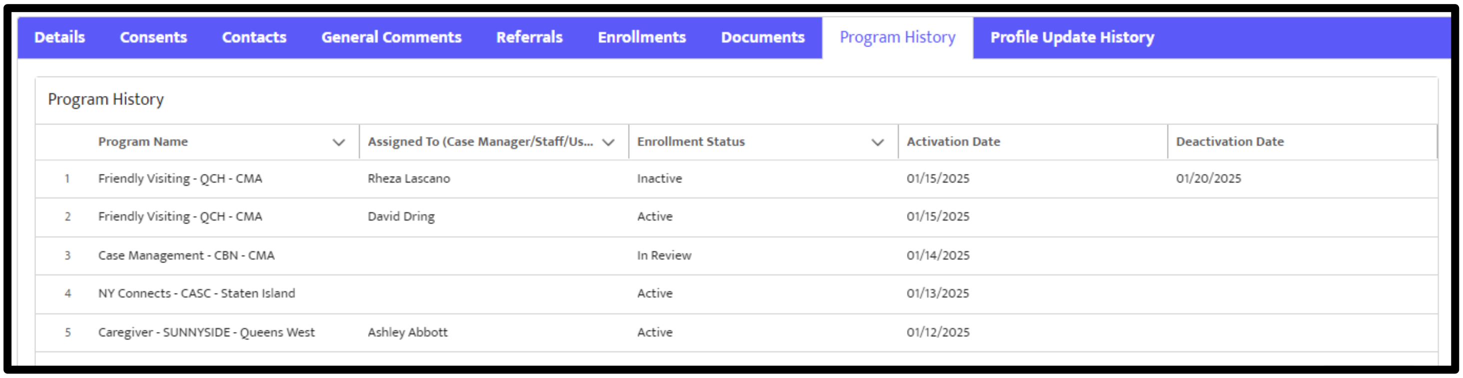
NOTE: *General Comments are* accessible to all users that have consent to view the client's information.

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



Program History Tab

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



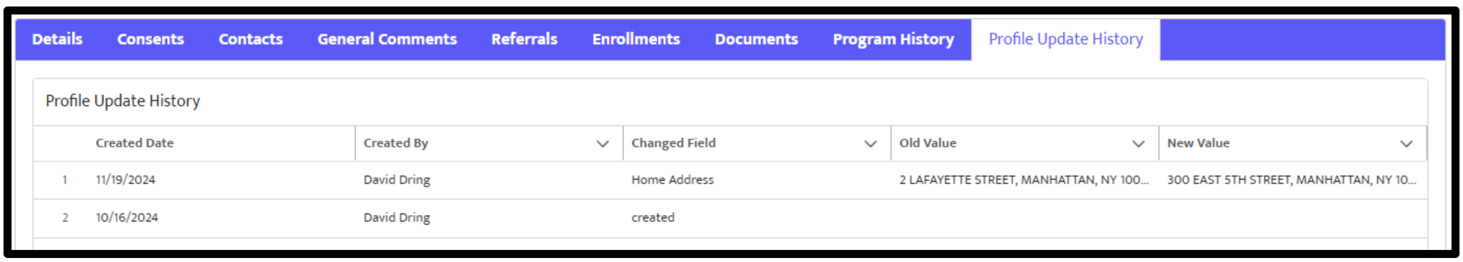
Details | Consents | Contacts | General Comments | Referrals | Enrollments | Documents | Program History | Profile Update History

Program History

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

Profile Update History Tab

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



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

Profile Update History

	Created Date	Created By	Changed Field	Old Value	New Value
1	11/19/2024	David Dring	Home Address	2 LAFAYETTE STREET, MANHATTAN, NY 100...	300 EAST 5TH STREET, MANHATTAN, NY 10...
2	10/16/2024	David Dring	created		

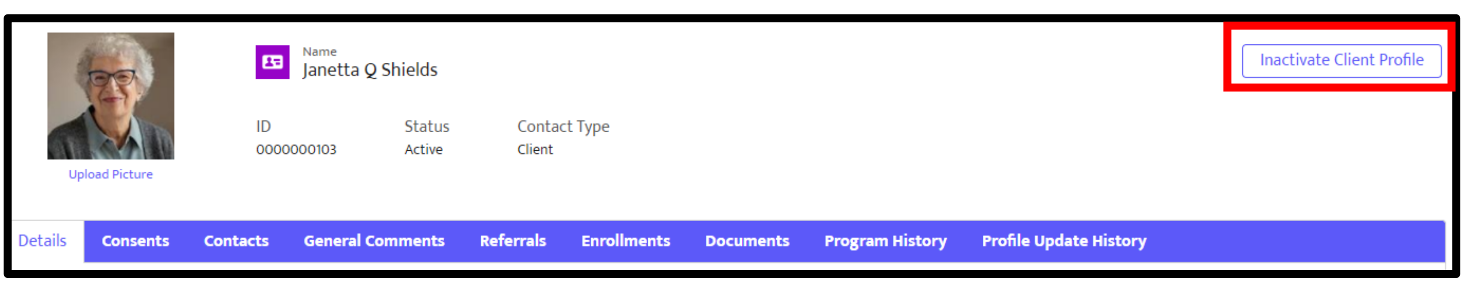
Inactivating a Client

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

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

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

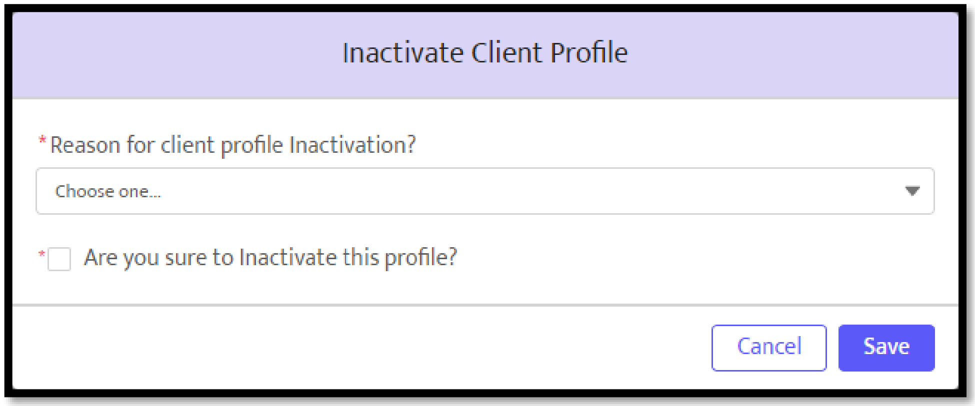
Step 1: Select the Inactivate Client Profile button at the top right of your screen.



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.



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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

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

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

Navigating Enrollments

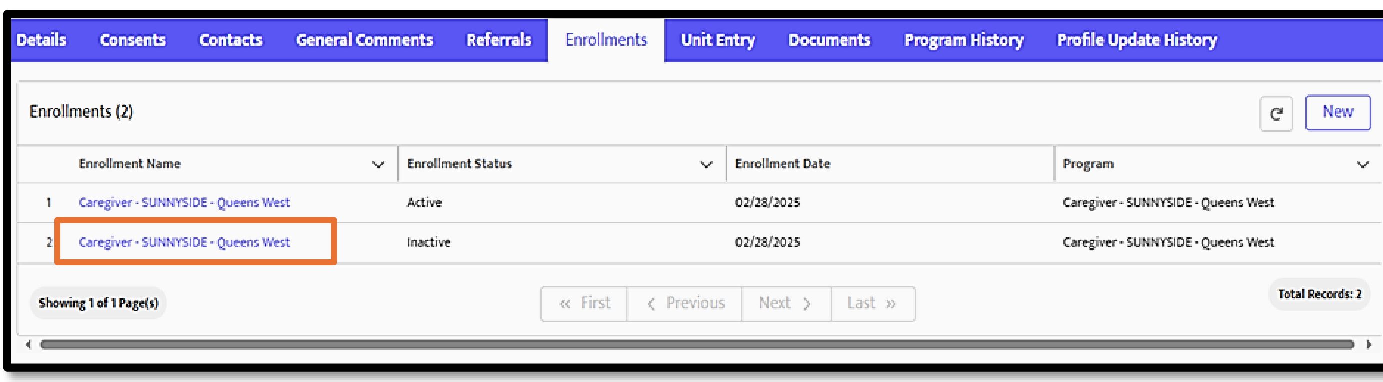
The **Enrollment** menu contains various tabs providing access to capture information about the client and track the work done on their behalf. The default tab on the menu bar will be **Enrollment Details.** Depending on the program type, the status of an enrollment will either default to **Active**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

Determining Client Enrollment

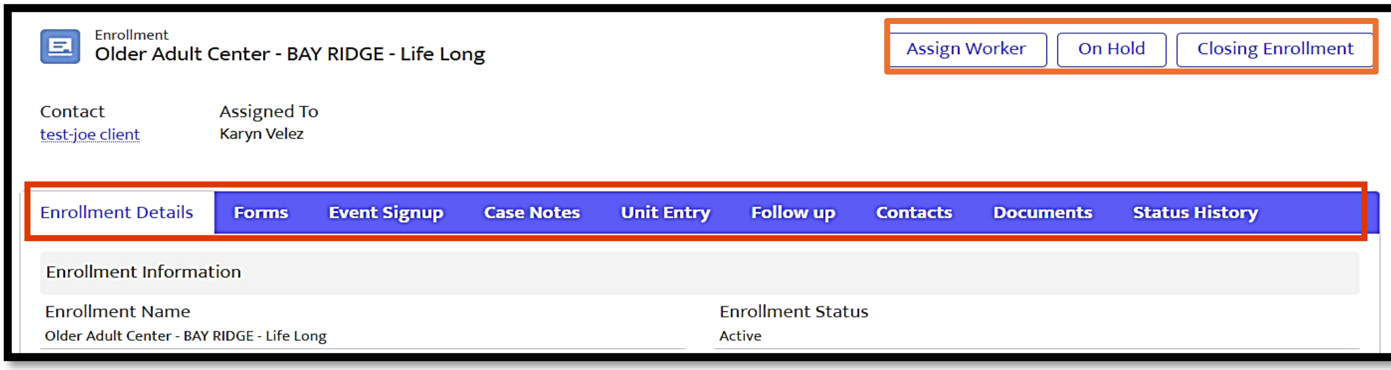
Step 1: Perform a **Client Search** and select the link of the desired client to open their profile.

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

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

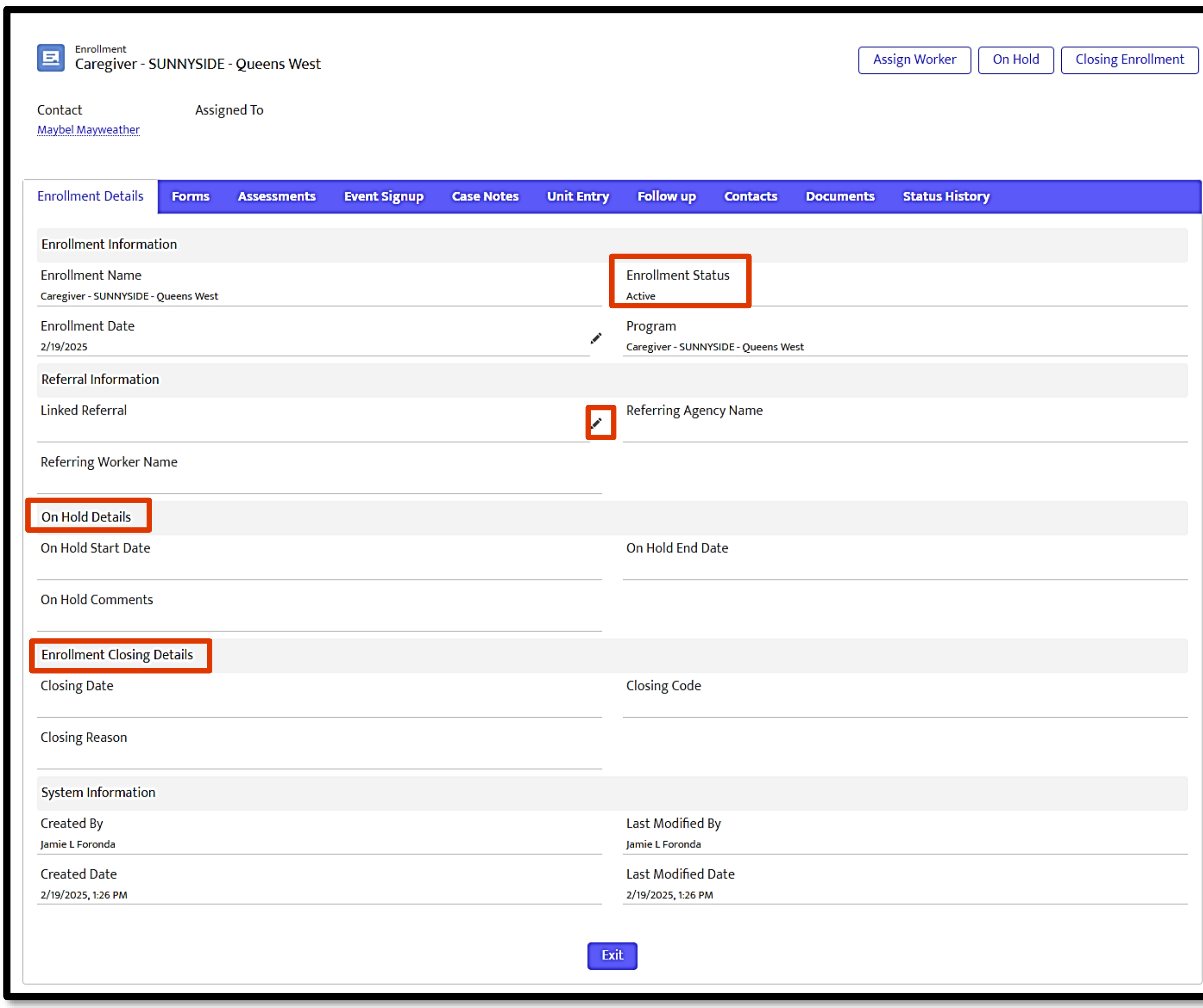


The top portion of the enrollment page will display the client's name, the name of assigned worker, and several navigational buttons that provide access to other database features. In addition, it also provides an overview of the enrollment record, **Referral Information**, **On Hold Details**, **Enrollment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



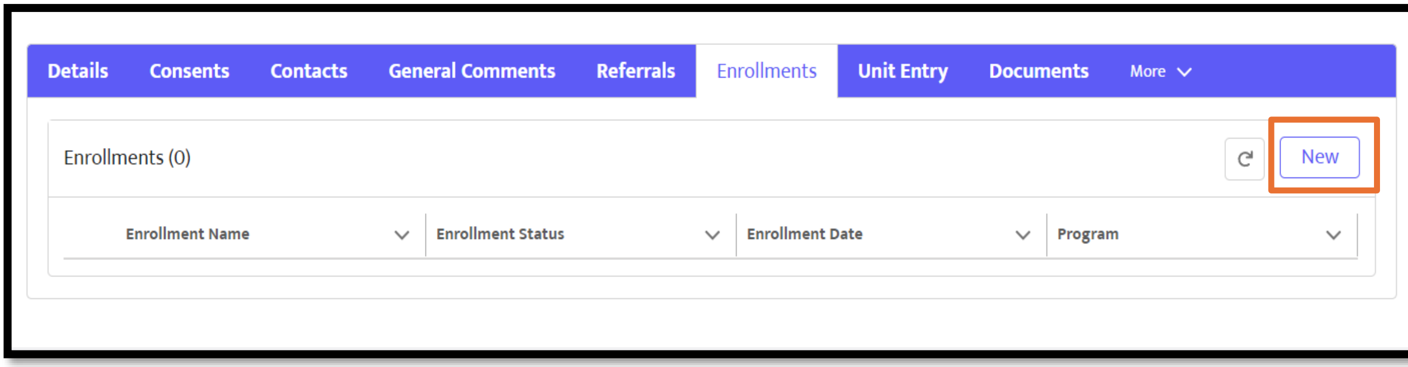
Creating Enrollments

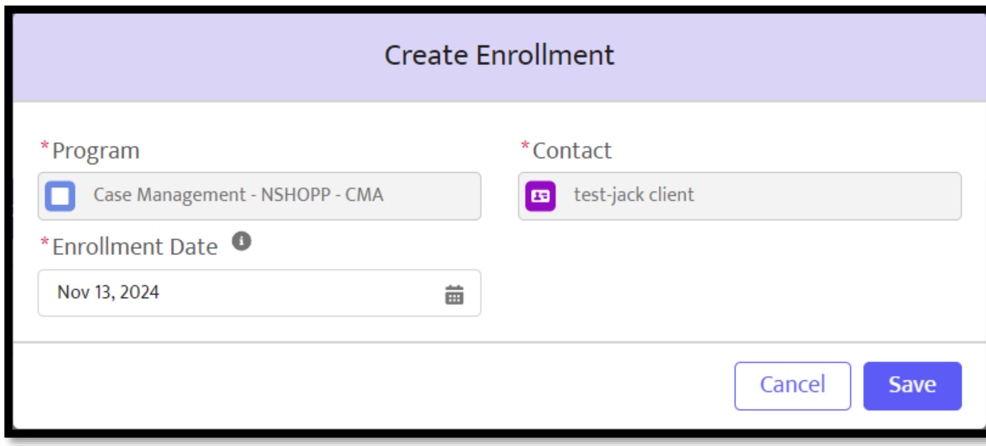
The **Enrollment Status** of the client will also display as **Active** by default unless changed. If no record is displayed on the Enrollments list view, then a new enrollment can be created.



Creating a new client enrollment

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





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

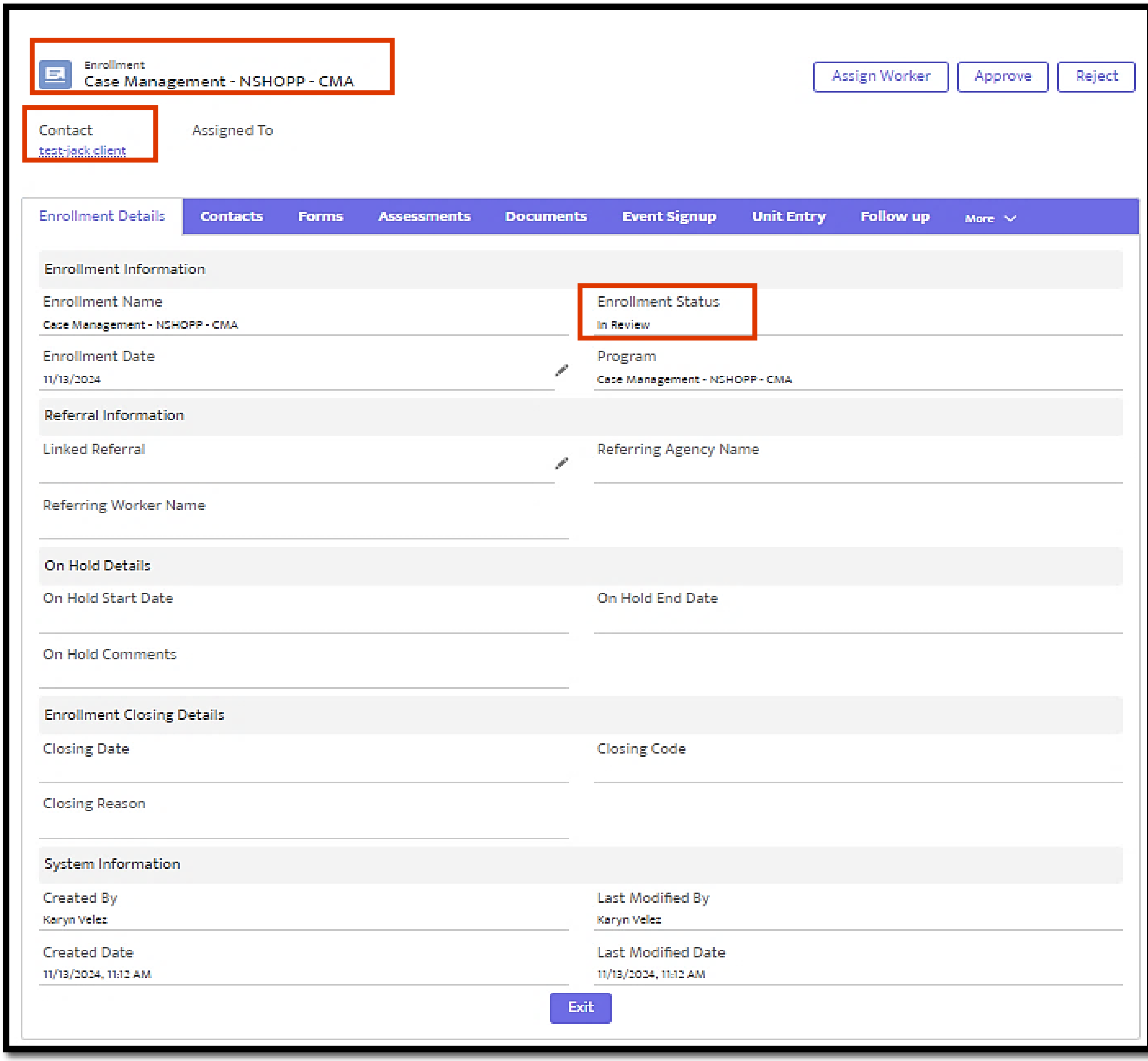
Step 3: Confirm all information is correct before selecting **Save** and you will be directed to the **Enrollment Details** section.

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

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

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

Enrollment Status In Review



Enrollment Details Menu

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

Common features include:

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

Program specific features include:

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

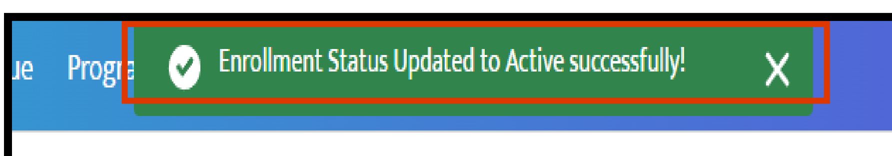
Enrollment: Additional Features

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

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

Approve a Client Enrollment

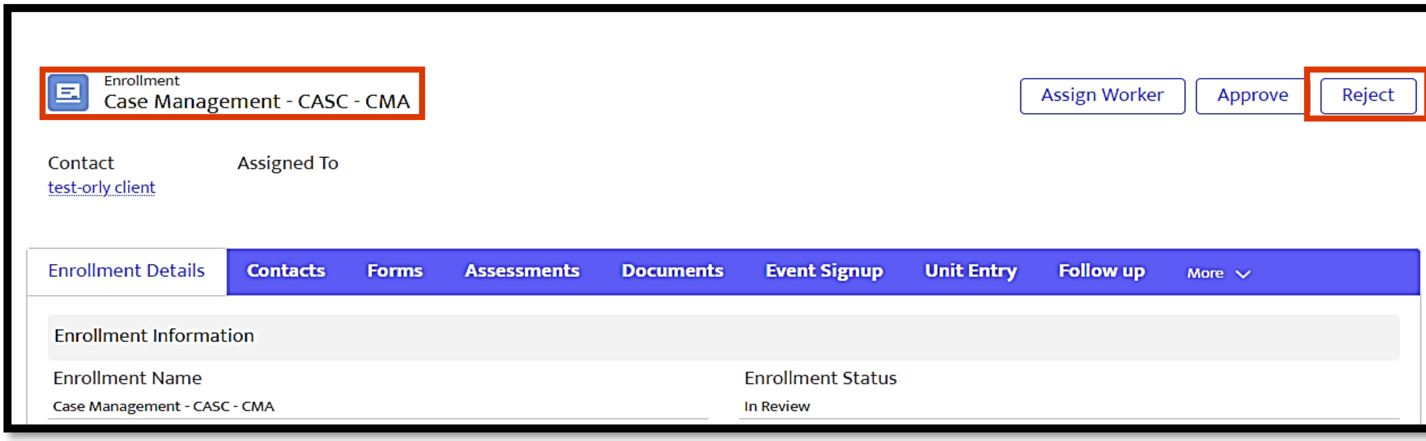
Programs who must **Approve** clients before the status of their enrollment can be updated from **In Review** to **Active** will see the **Approve** button displayed on the **Enrollment** screen. Once the **Approve** button is selected, a notification of successful activation will display. *(See below)*



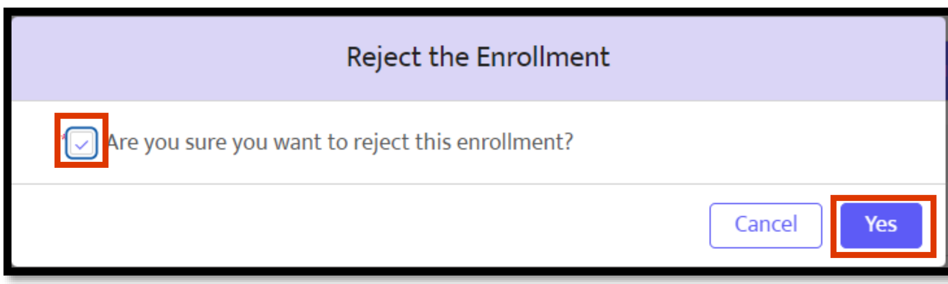
The **Approve** and **Reject** buttons from the **Enrollment Details** screen are replaced with a **Closing Enrollment** button. The status of the client's enrollment updates to **Active**.

Reject Client Enrollment

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



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



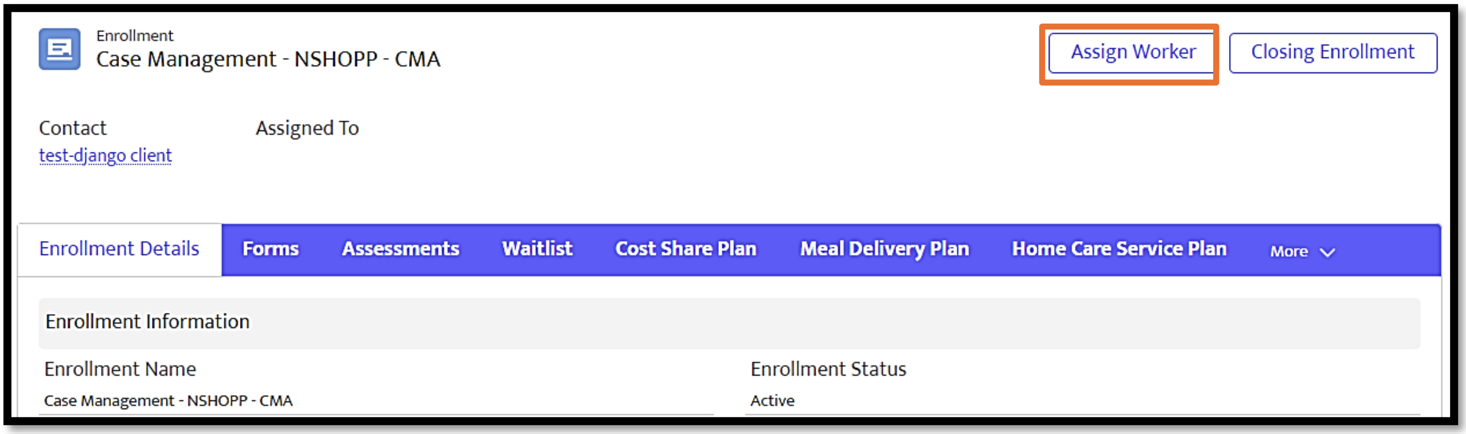
Step 3: Select **Yes**. The **Enrollment Status** will be set to **Inactive** on the **Enrollment Details** page.

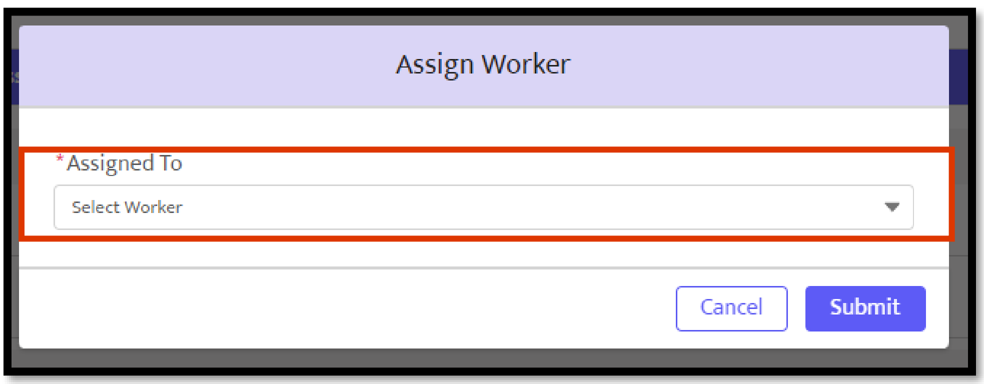
NOTE: *If the **Reject** button is selected, the client's enrollment will be **Inactivated**. To "reactivate" the client's enrollment, a new **Enrollment** will need to be created.*

Assign Worker

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

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



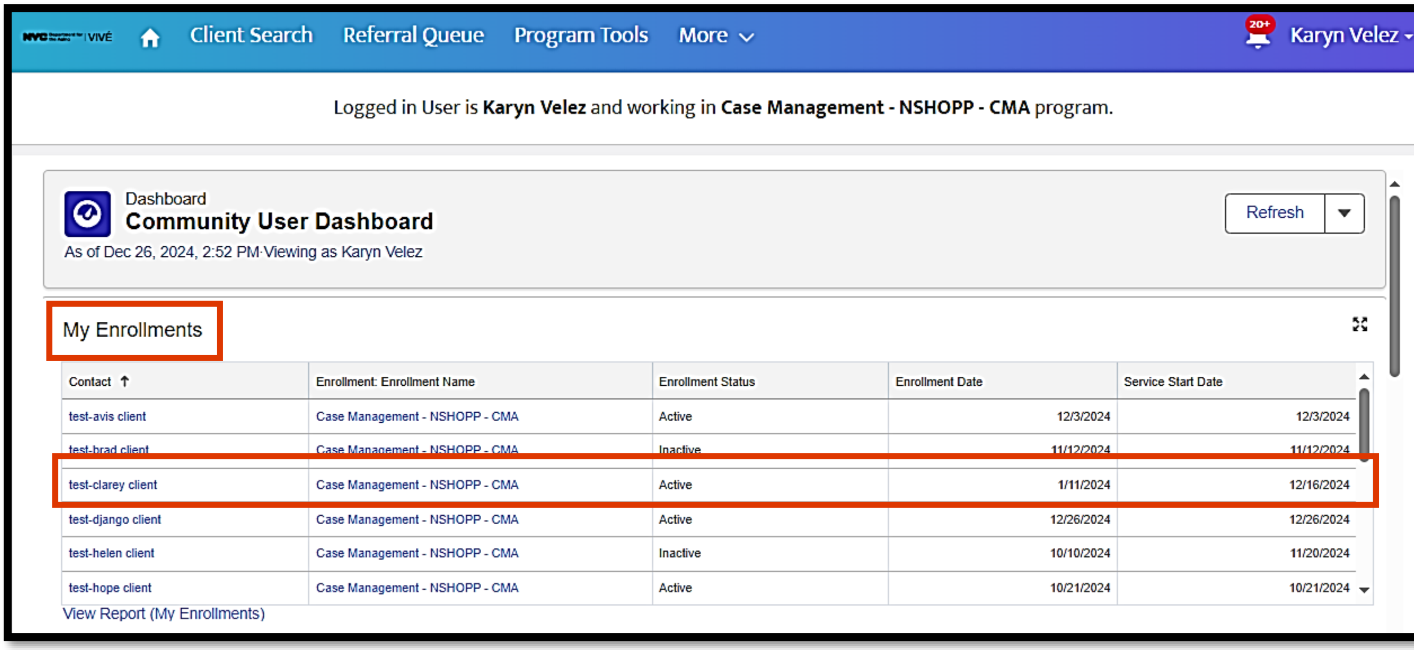


Step 2: Pick the worker's name who will be assigned to the client and select **Submit**. The worker's name will be added to the **Enrollment** screen's **Assigned To** field. A user can also view their assigned enrollment(s) through the **Dashboard** in the **My Enrollments** section.

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

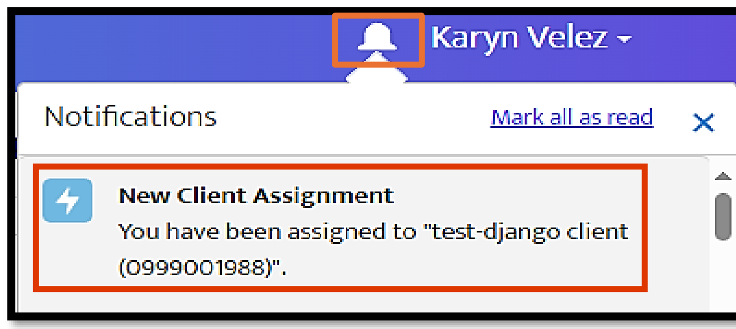
My Enrollments in Dashboard

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



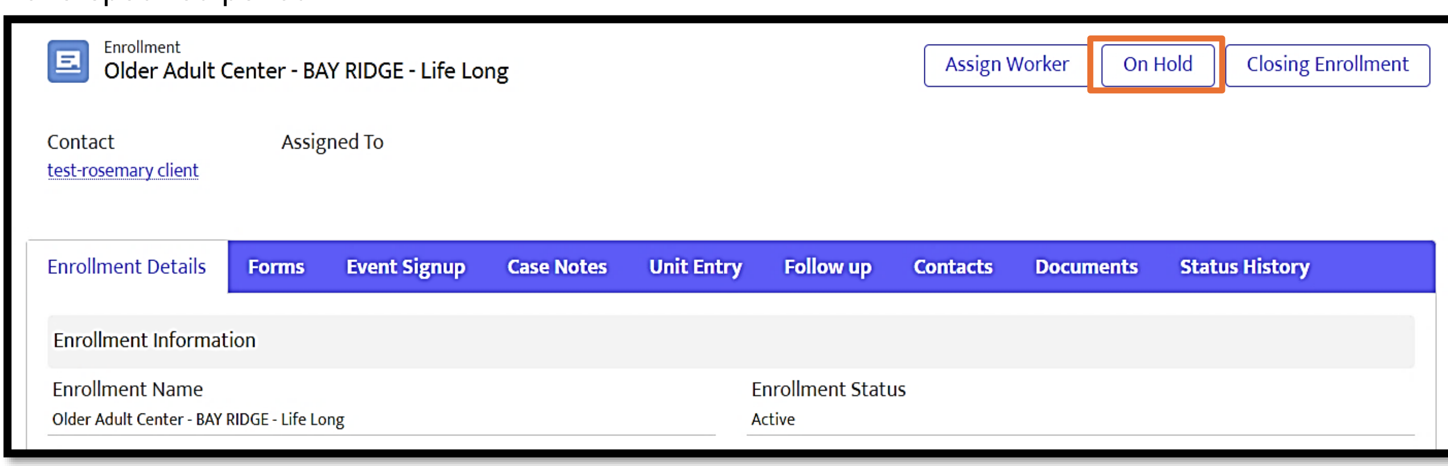
In addition, a notification prompt regarding the recently assigned Enrollment will display in Notifications. To view this request, select the Bell Icon.

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



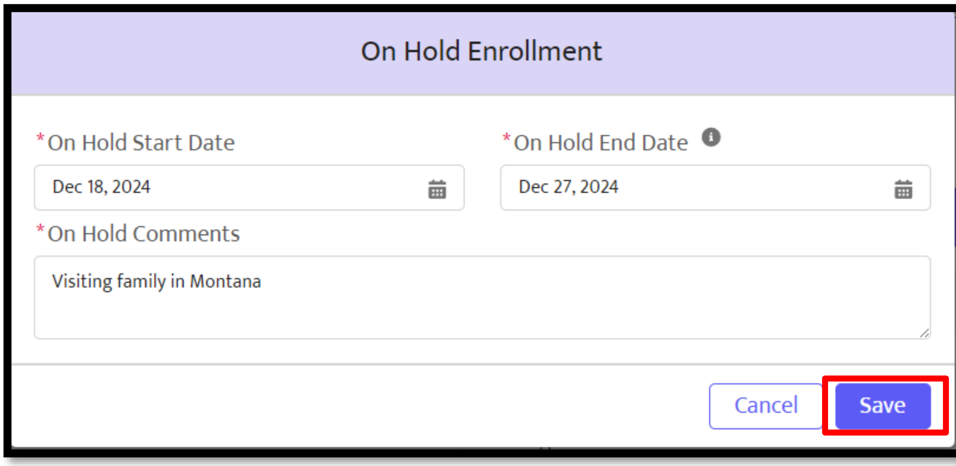
Place an Enrollment On Hold

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



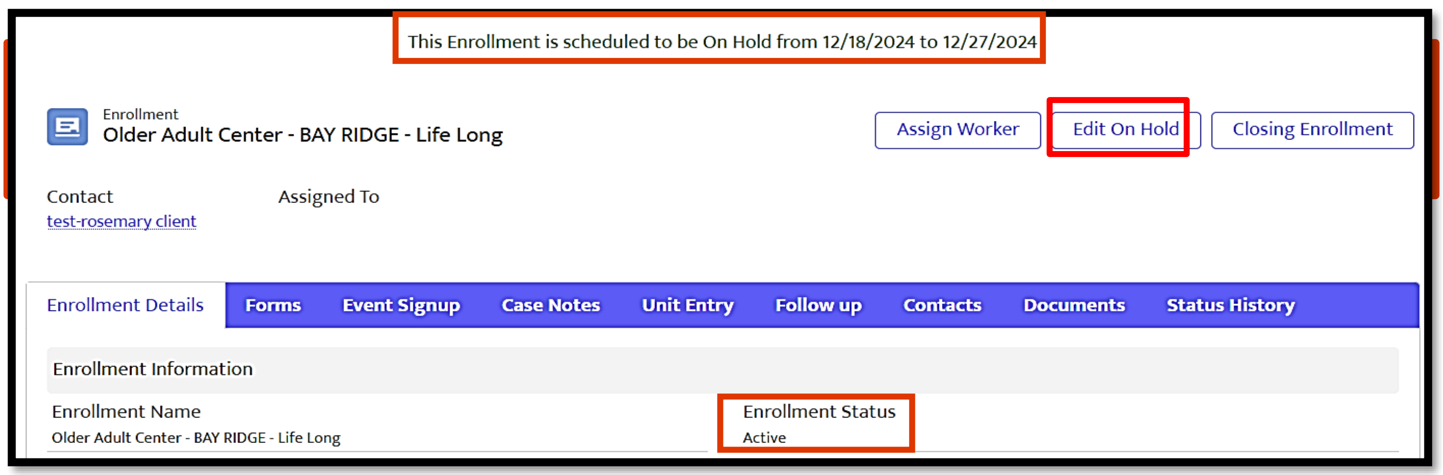
Step 1: Select the **On Hold** button. The **On Hold Enrollment** pop-up will display.

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



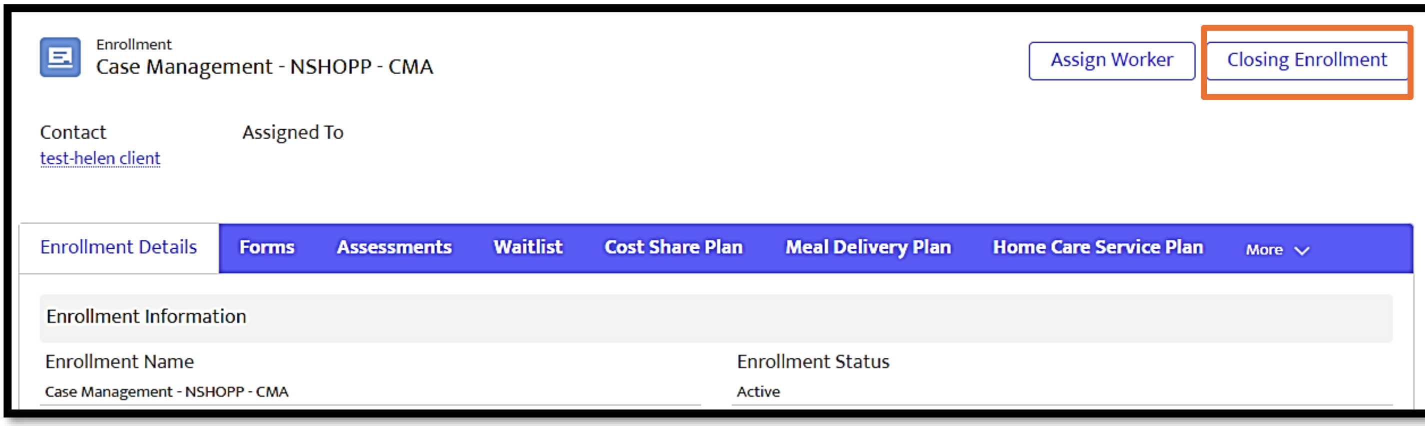
Fill in all required fields in the **On Hold Enrollment** form. Fields with a red asterisk (*) are required. Select **Save.**

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



Closing Enrollment

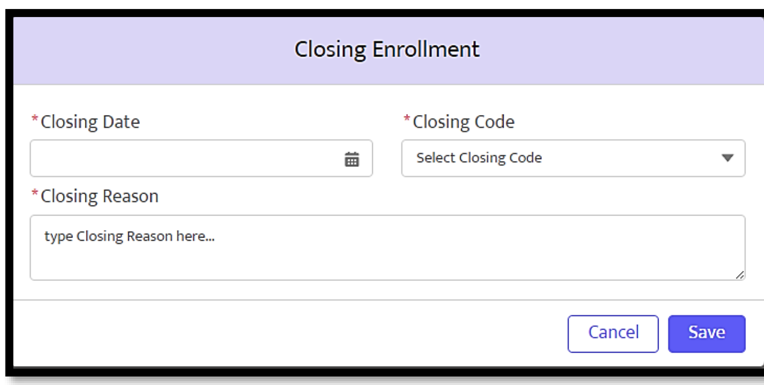
On the **Enrollment** screen, the **Closing Enrollment** button is available to close a client's record in your specific program.



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

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

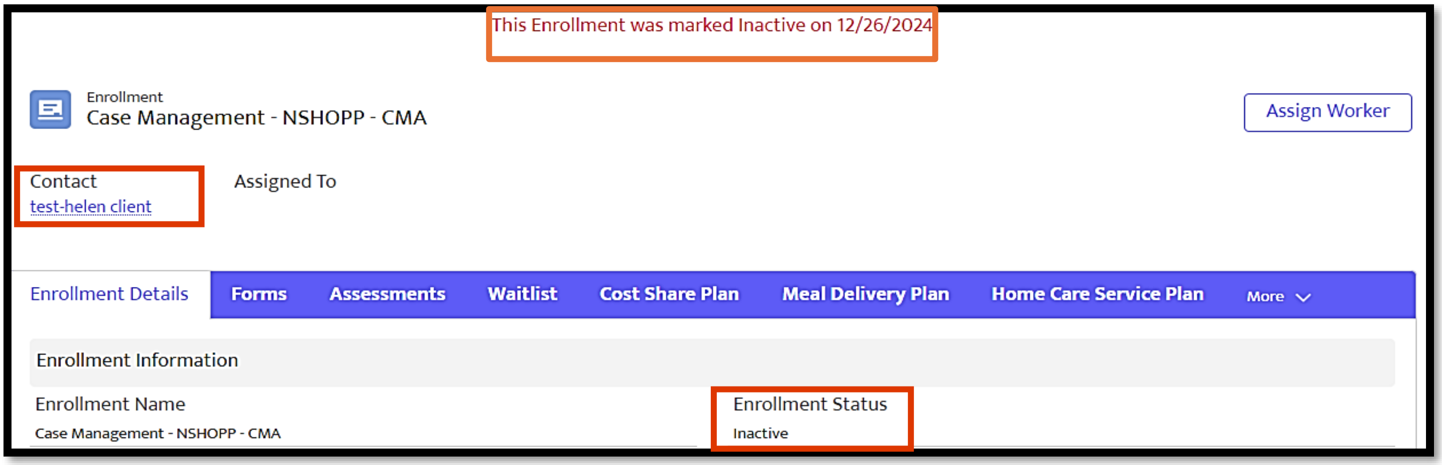
Closing an Enrollment: Past date



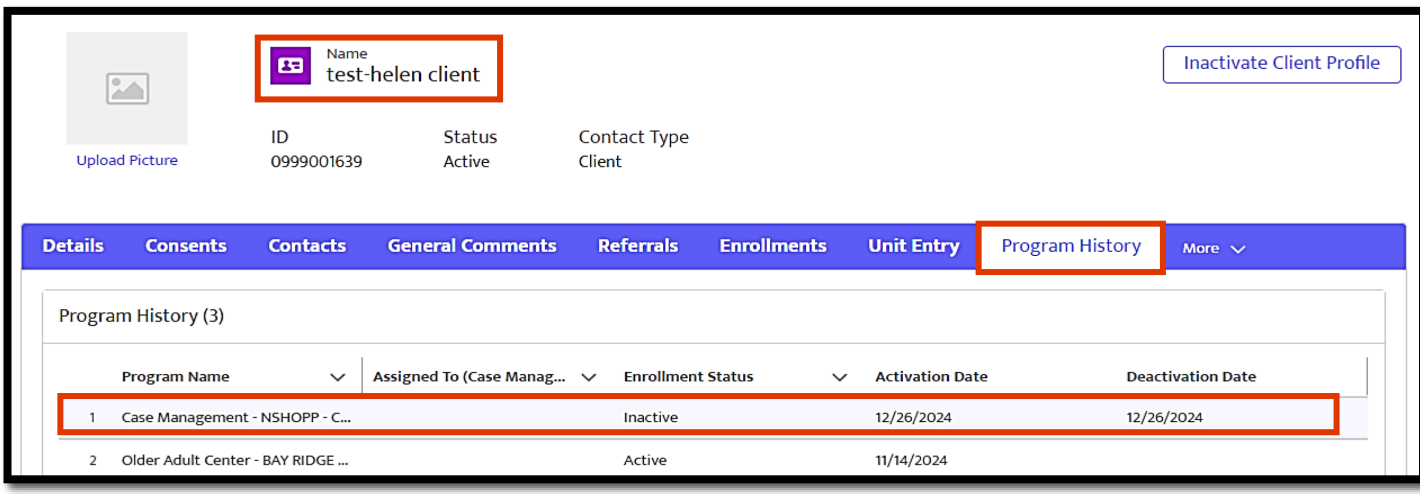
Step 1: Select the **Closing Enrollment** button. The **Closing Enrollment** pop-up will appear with the required fields **Closing Date**, **Closing Code** and **Closing Reason**.

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

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



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

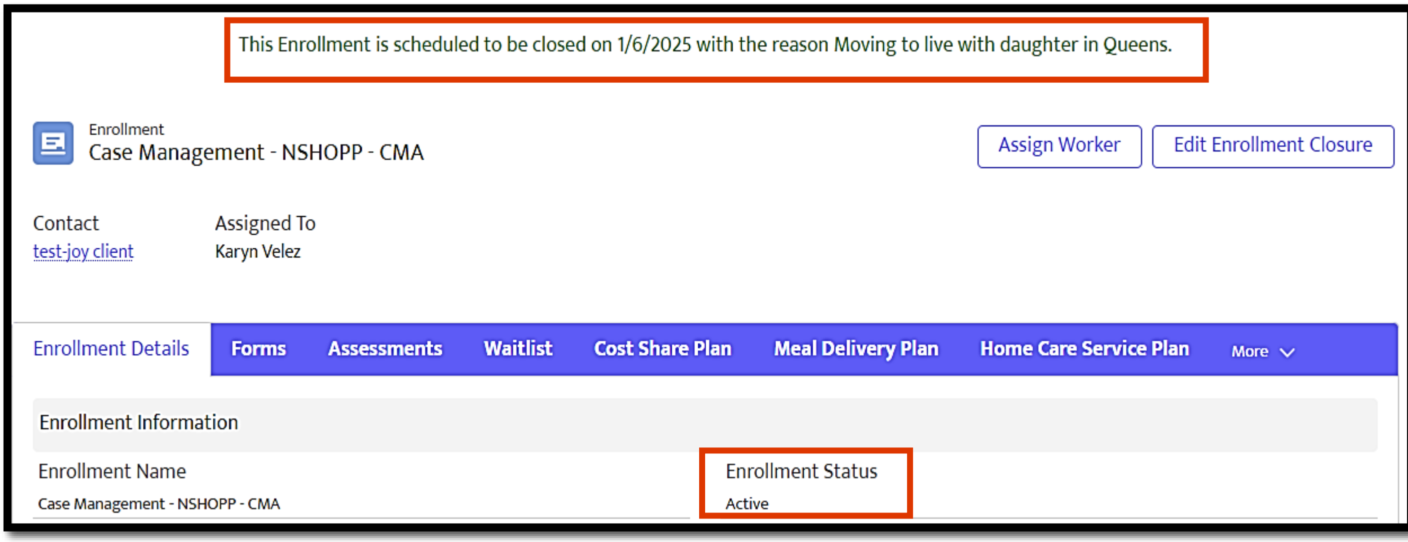


NOTE: *To protect client confidentiality, there are four programs that will never display the client's enrollment status on Program History. These programs are Elder Justice, Geriatric Mental Health, Elderly Crime Victims Center and Legal Services.*

Closing Enrollment: Future Date

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

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



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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

- 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.

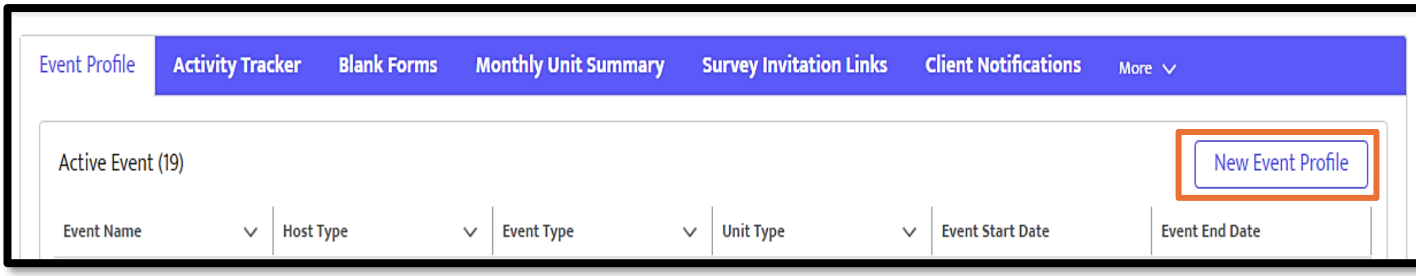
You may access this guide from the VIVÉ Knowledge Base or from a program specific reference guide. At the beginning and end of this document is a link to return to the VIVÉ Knowledge Base. You can also use your browser's back button to return to the program reference guide.

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.

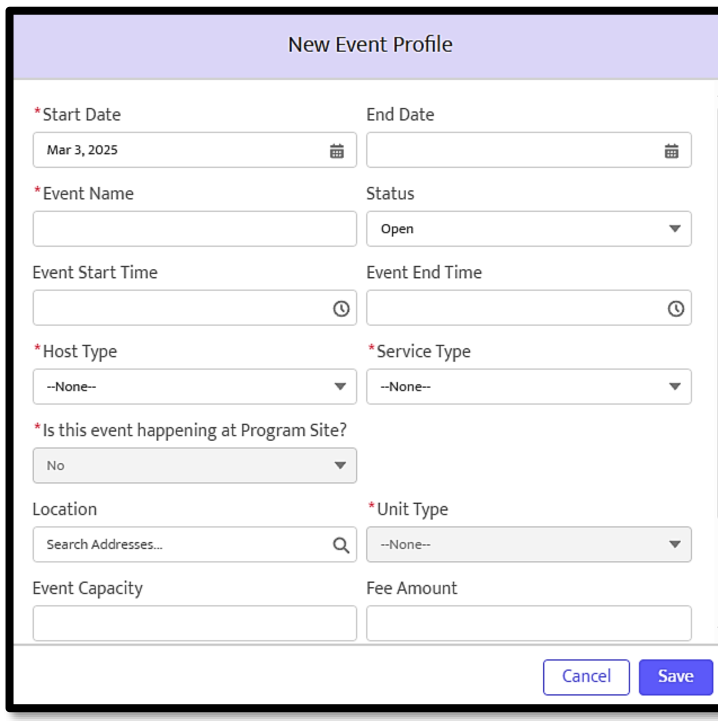
In this guide you will learn:

Creating Events

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



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



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

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

Signing up Clients for an Event

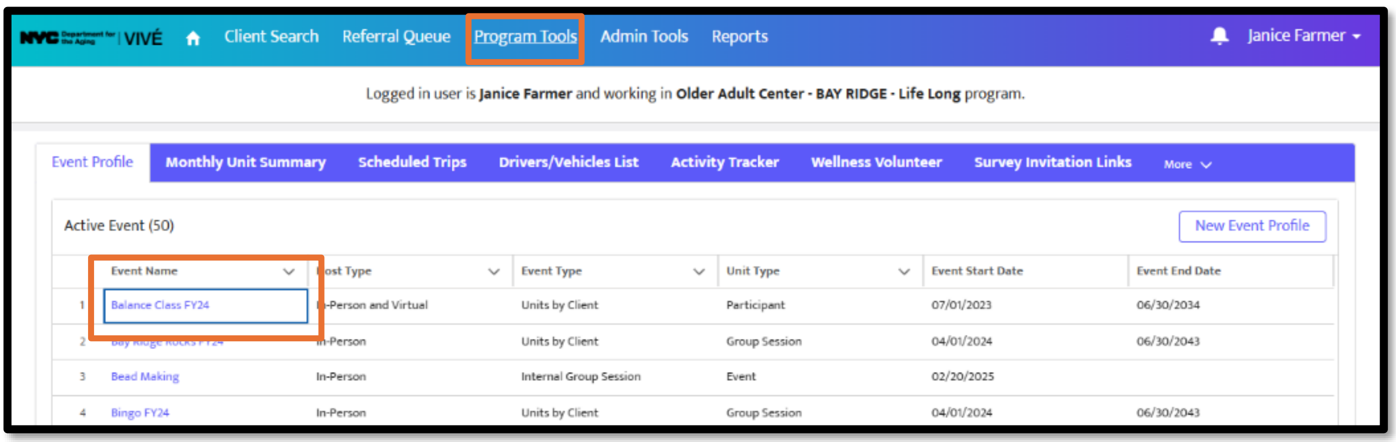
There are three ways to sign up a client enrolled in your program for an event.

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

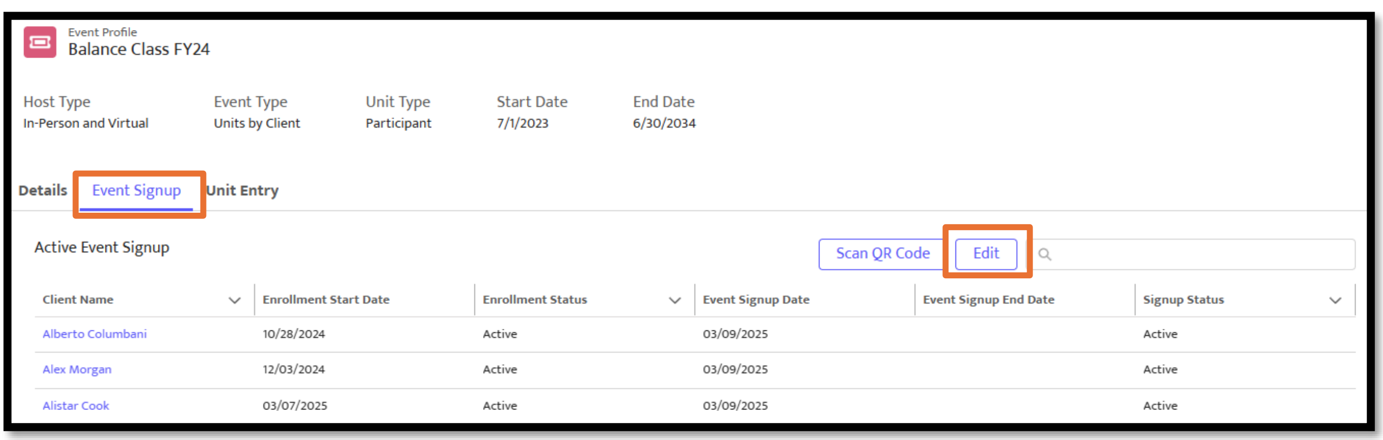
Signing up & Removing Clients via Event Profile

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

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

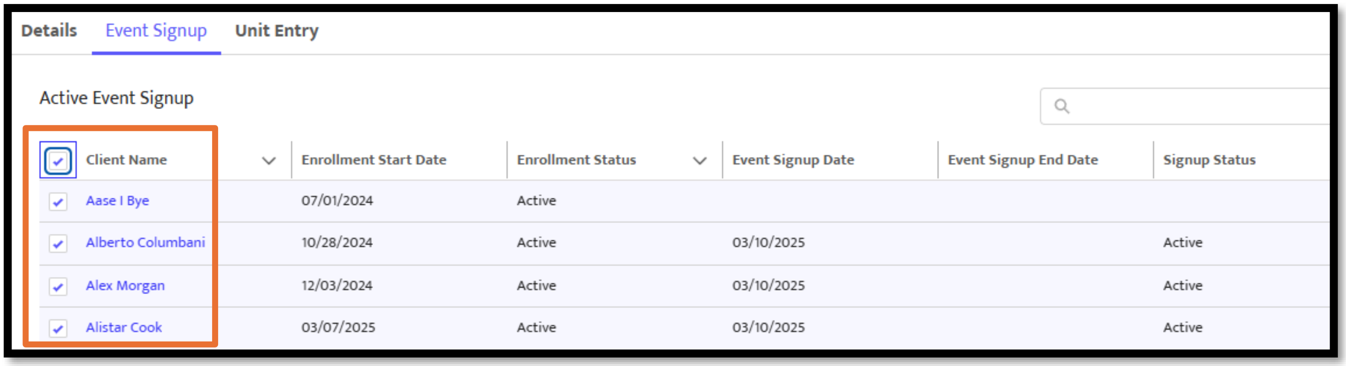


Step 3: Click **Event Signup**.



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

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


Details Event Signup Unit Entry

Active Event Signup

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

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

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

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

Remove Client via Event Profile

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

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

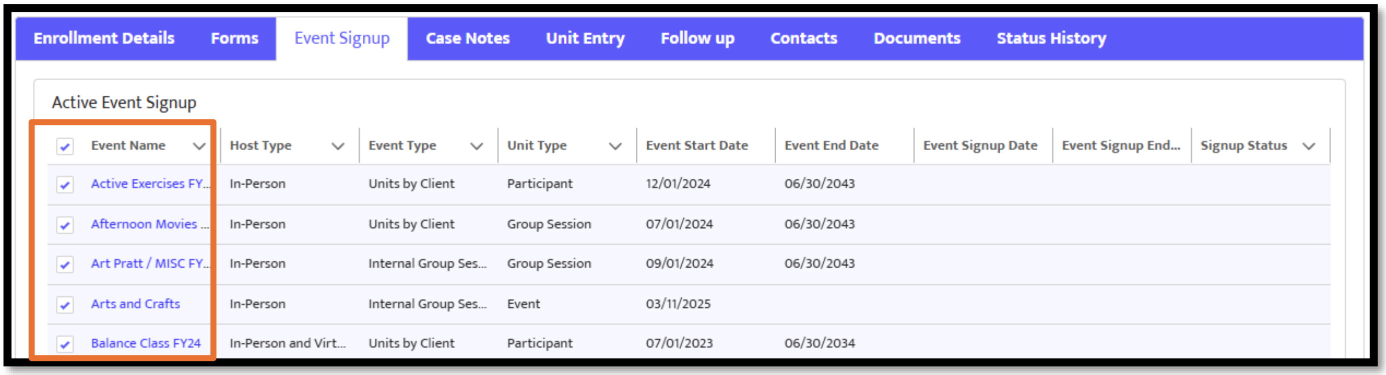
Sign up & Removing Clients via Enrollment Details Menu

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

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

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

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



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

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

Removing Client via Enrollment Details

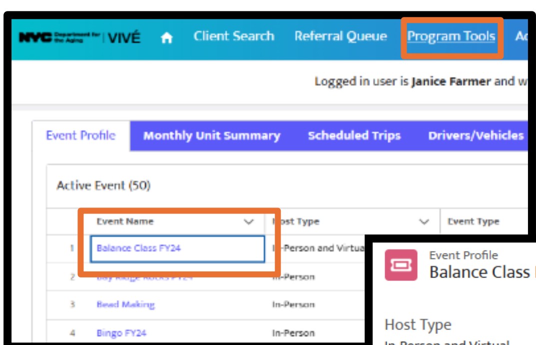
To remove a client from that event, uncheck the box to the left of their name.

Signing Up Client via QR Code Scan

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

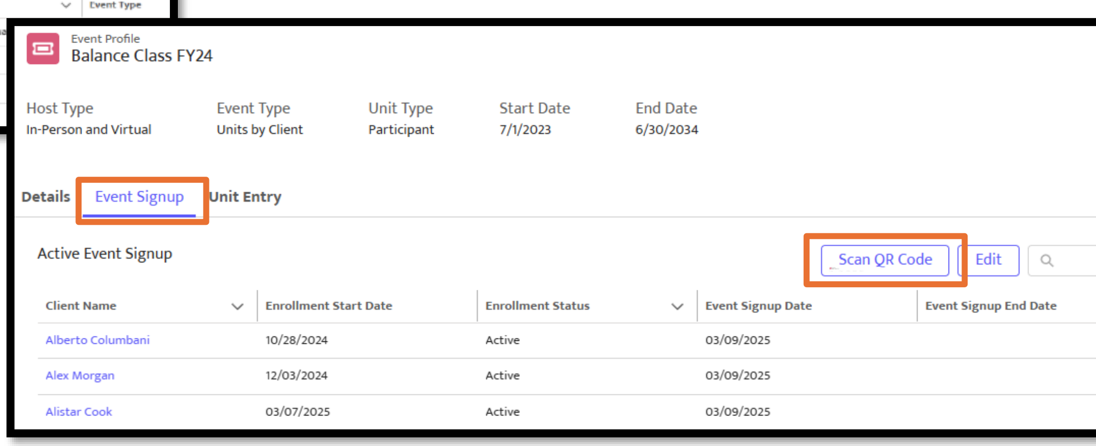
NOTE: *The client needs to be enrolled in your program before using the QR Code scanning.*

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



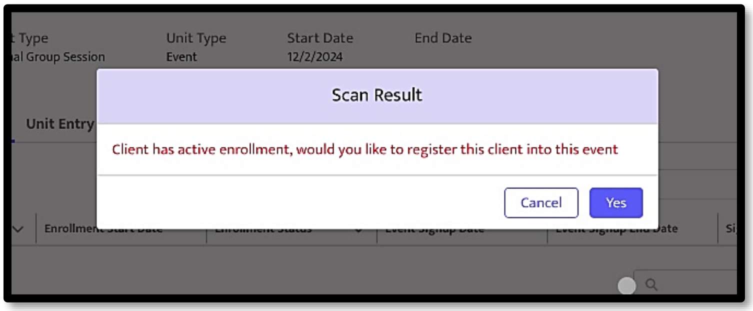
Step 2: From **Program Tools**, click **Event Profile**. Then click the link to the name of the event you wish to view.

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



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

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



Event Unit Entry

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

There are three ways to add units to an event:

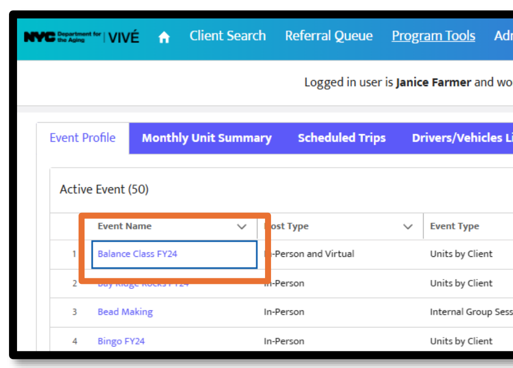
- Entering units from the **Events Profile** (good for entering units quickly for multiple clients).
- Entering a unit for a client from the **Enrollment Details** Menu.
- By using the **Scan QR Code** feature (most accurate way to enter units).

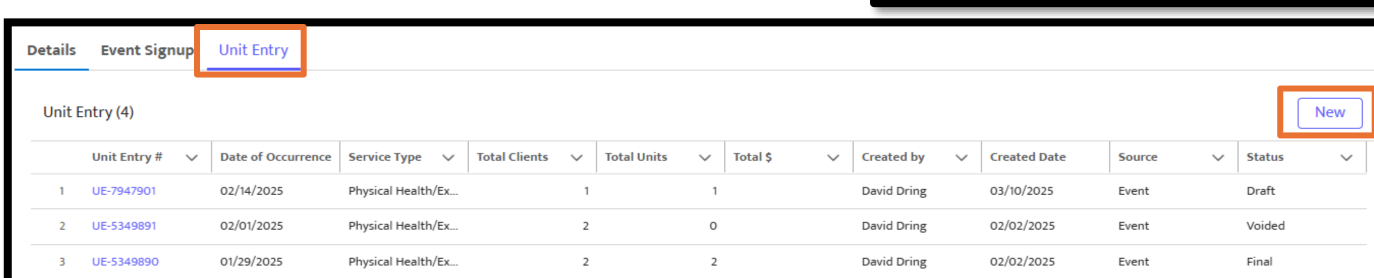
Entering Units from the Events Profile

First, create a unit entry.

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

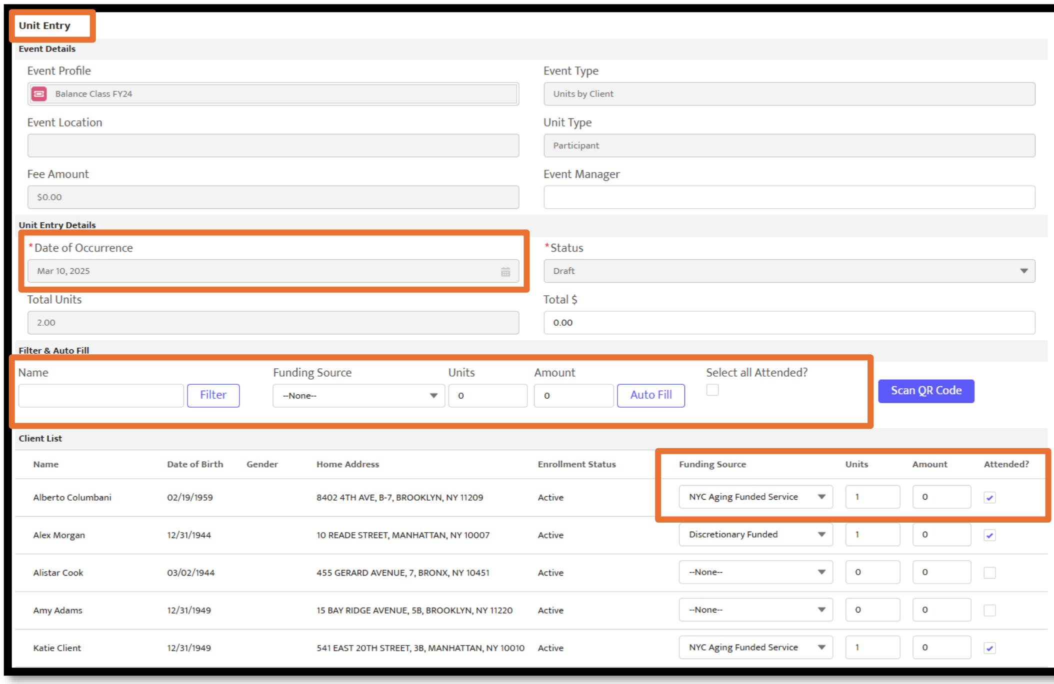
Step 2: From **Program Tools**, click **Event Profile**. Then click the link to the name of event you wish to manage.





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

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



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

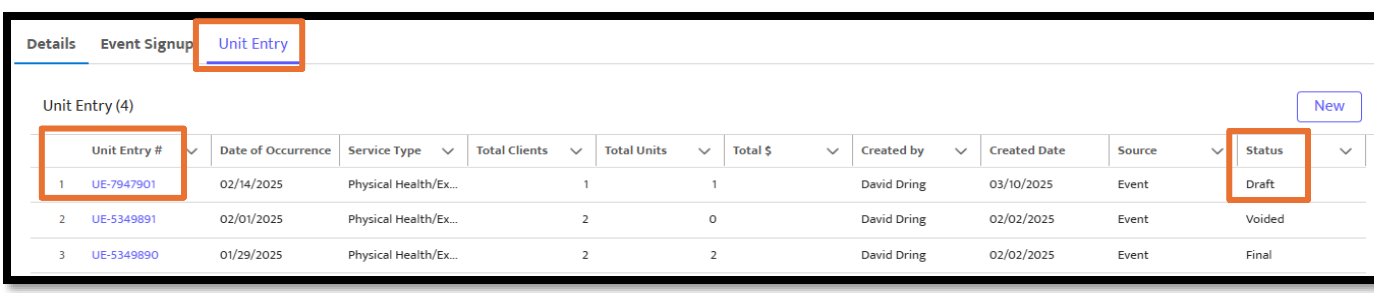
Step 6: Either enter the units using the Auto Fill or individually by client.

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

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

Editing an Existing Unit Entry

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



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

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

- Draft: This unit is still editable.

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

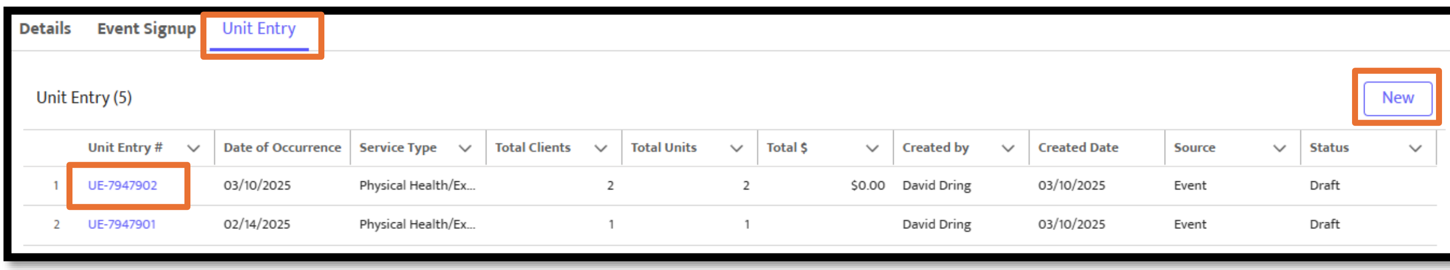
Enter Units By Scanning QR Codes

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

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

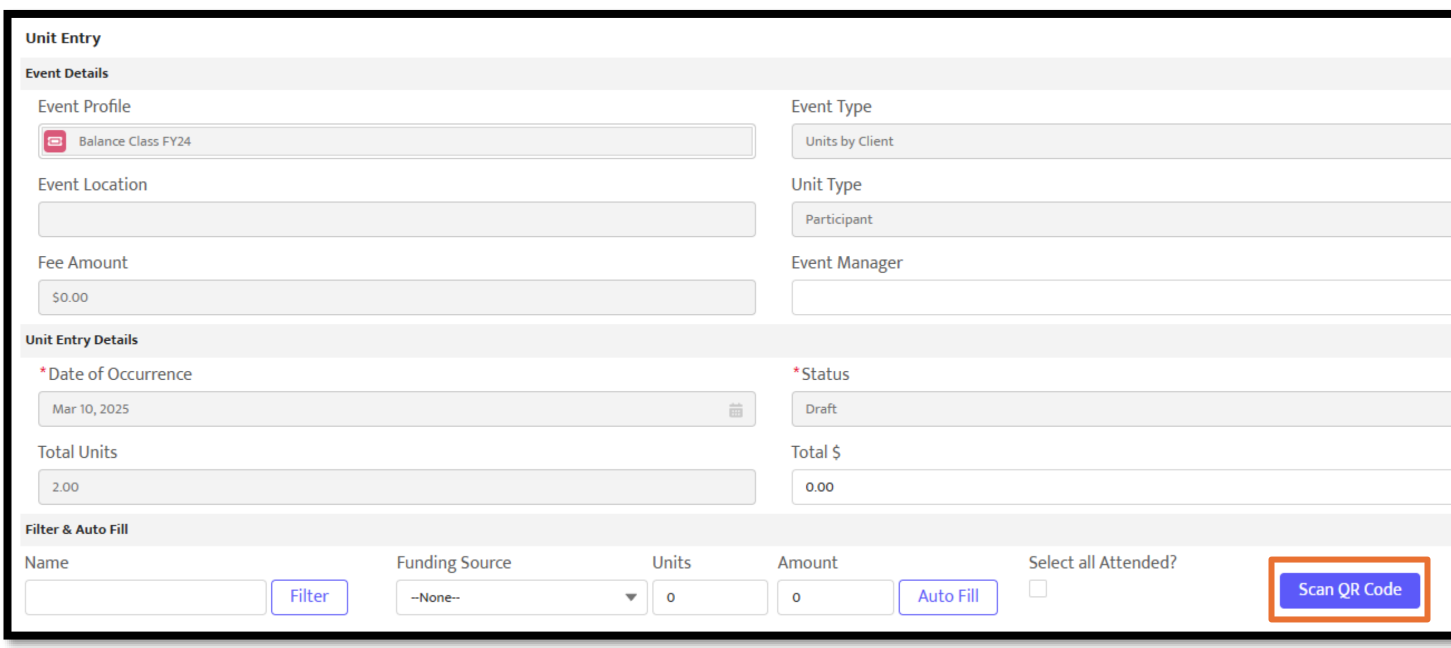
Step 2: Click on the event you want to scan clients into.

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



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

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

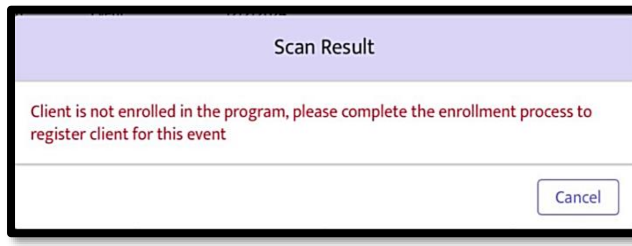


Step 6: A windowpane appears showing the image from the back facing camera. Maneuver the camera so that the member's ID card is clearly within the windowpane.

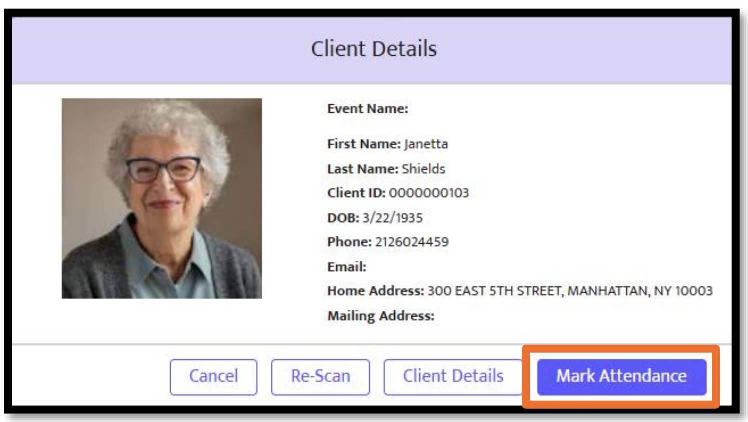
Step 5: If the client's QR Code is recognized, a confirmation pop-up will appear. From this pop-up you can Cancel, Rescan, view the client's details or Mark Attendance.

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

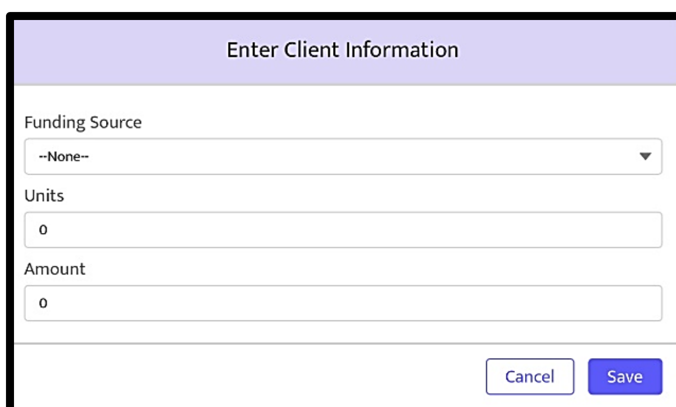
If the Client's QR Code is not recognized because the client is not enrolled in the program, a pop-up will appear telling the user to complete the enrollment process.



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



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



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

Entering Anonymous Units for Events

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

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

Entering Anonymous Information & Referral Units

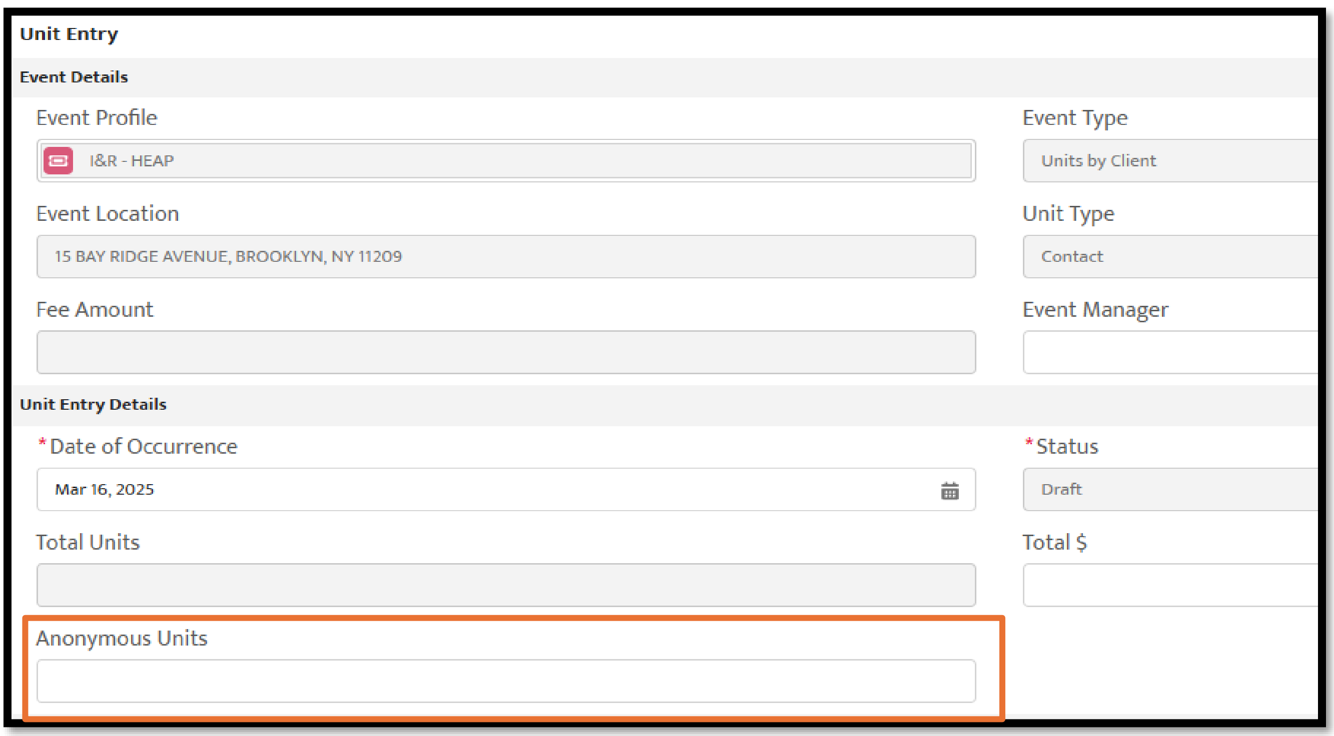
Step 1: From the Top Menu, click Program Tools. From Program Tools, click the Event Profile tab.

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

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

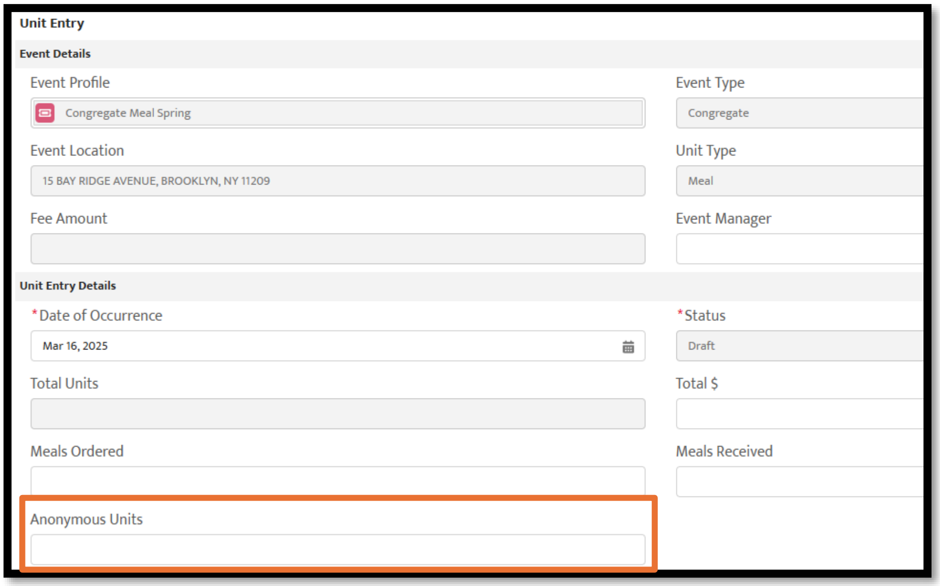
Step 4: Select the New button.

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



Entering Anonymous Meal Units

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



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

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

Step 4: Select the New button.

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

NOTE: *There are no anonymous clients allowed.*

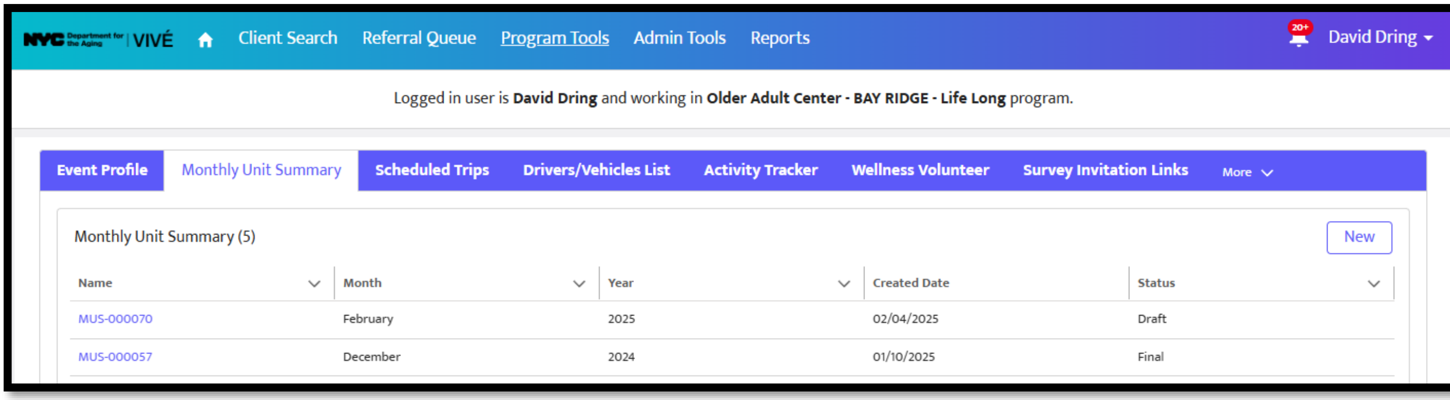
Entering Meals Provided for Other Eligible Seniors, Ineligible Meals and Eligible Volunteers

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

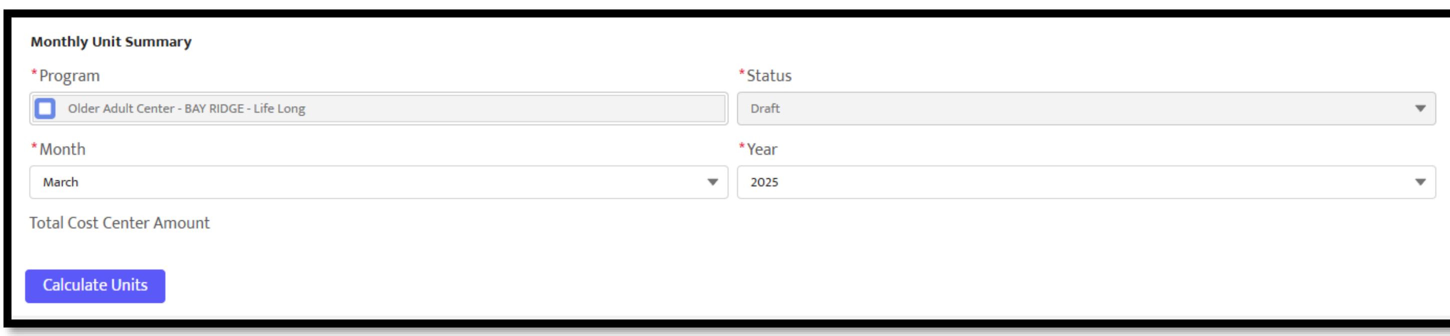
Monthly Unit Summary

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

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



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



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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

Return to VIVÉ Knowledge Base

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.

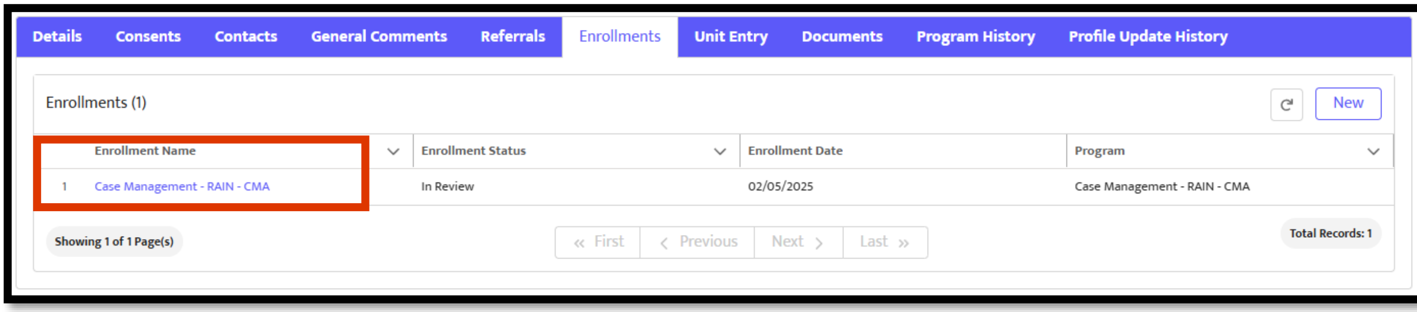
In this guide you will learn to:

Follow Up Overview

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

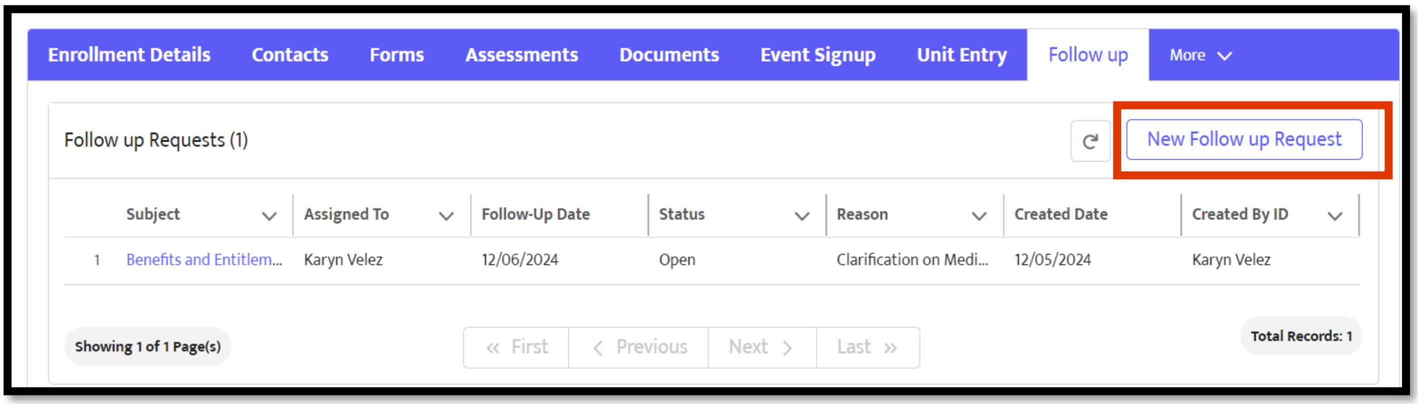
Create a Follow Up Request:

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



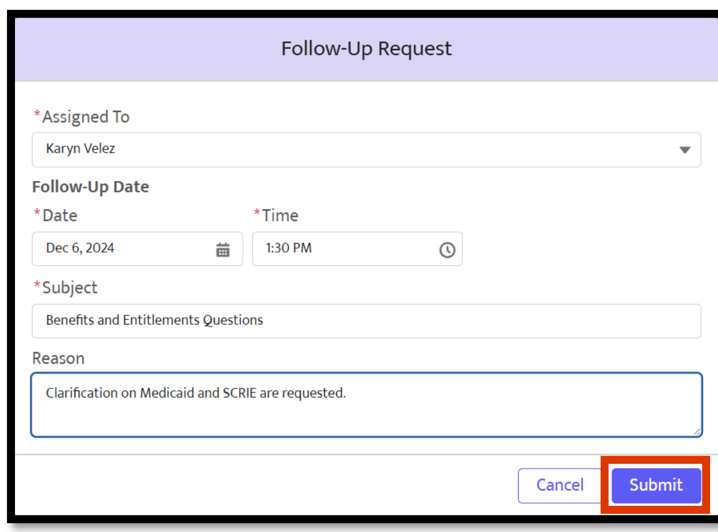
Step 2: Click the **Follow Up** tab. This tab displays the follow-ups that are associated with this contact.

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



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

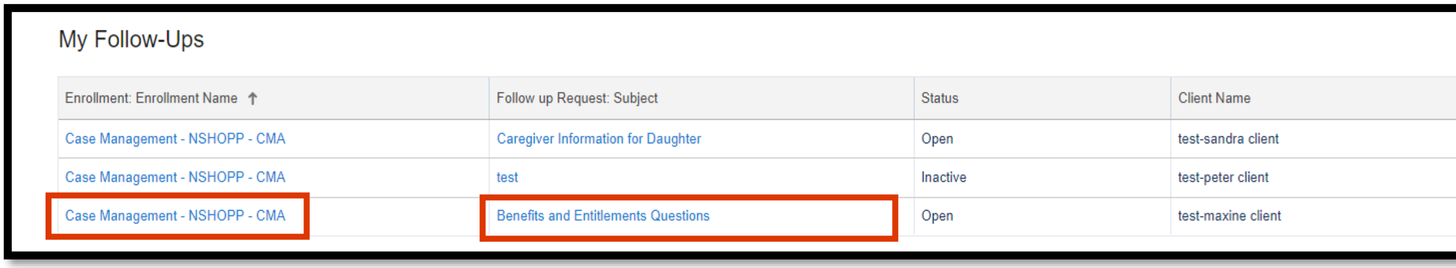
NOTE: *The **Follow Up** request will prompt a notification to the assignee and the details will appear on their Dashboard. (For more information on the Dashboard)*



Receive a Follow Up Request

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

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.



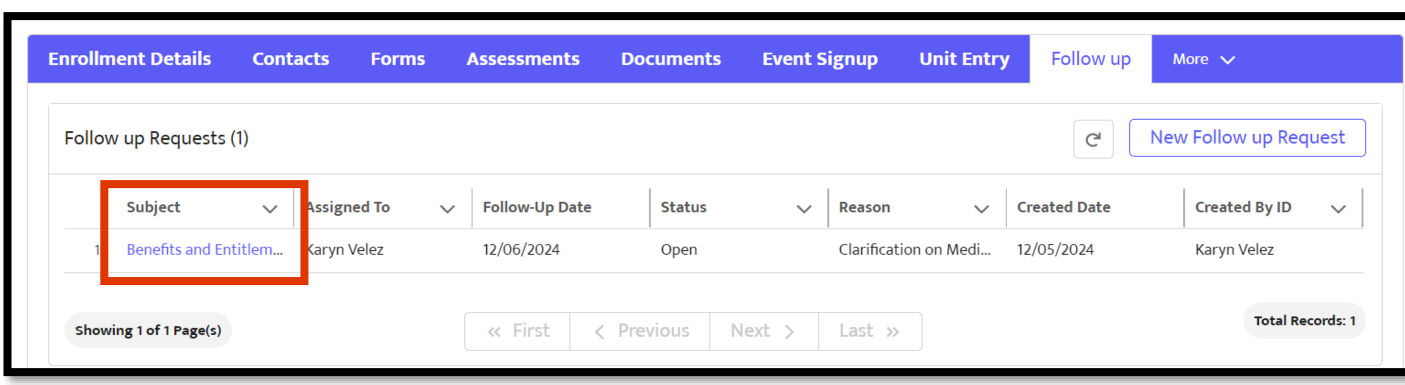
In addition, a notification prompt will be displayed in the assigned worker's **Notifications.** To view this request, the worker can select the **Bell Icon** on the **Top Menu**. Key information about the **Follow Up** will be included in the notification.

Edit a Follow Up Request

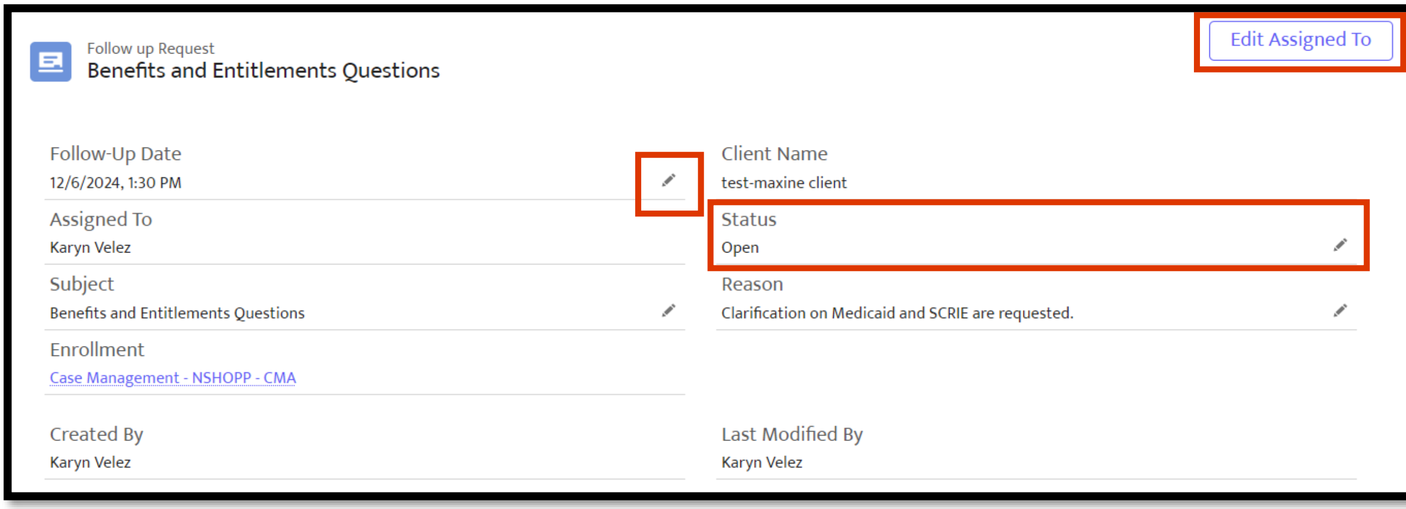
Information details in the **Follow Up** request can be edited prior to the request's **Follow Up** due date or after the request has been completed.

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

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



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



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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

Return to VIVÉ Knowledge Base

The VIVÉ Unit Entry Reference Guide

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

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

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

In this guide you will learn:

- **Overview of Unit Entry**
- **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.

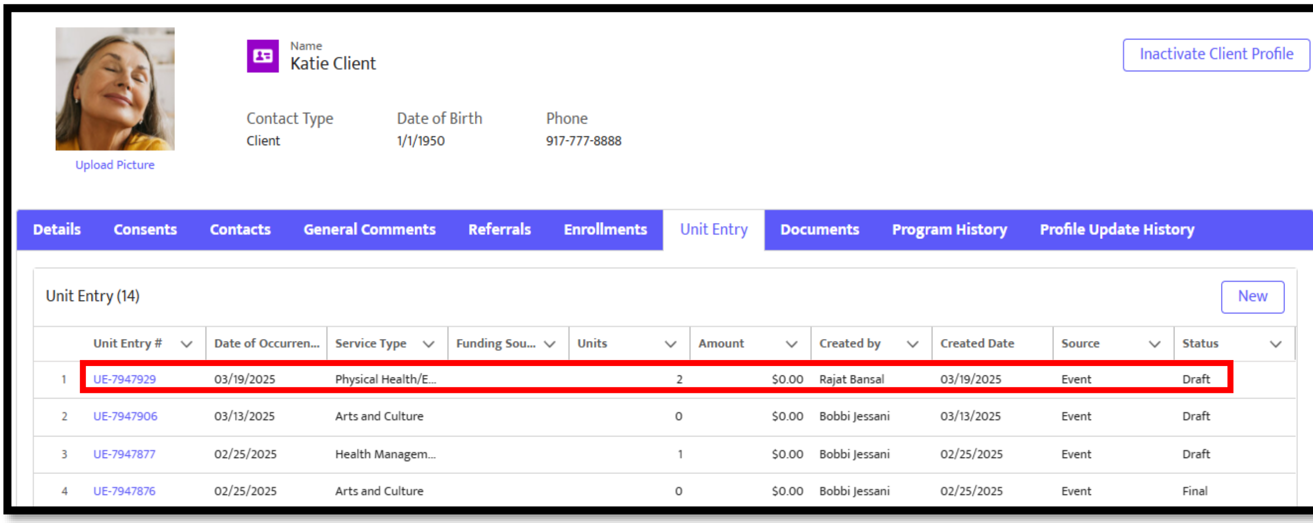
You can enter units in VIVÉ in three places: **Details Menu**, **Enrollment Menu**, or **Program Tools**. For more information on Events.

Editing Existing Units from Details Menu

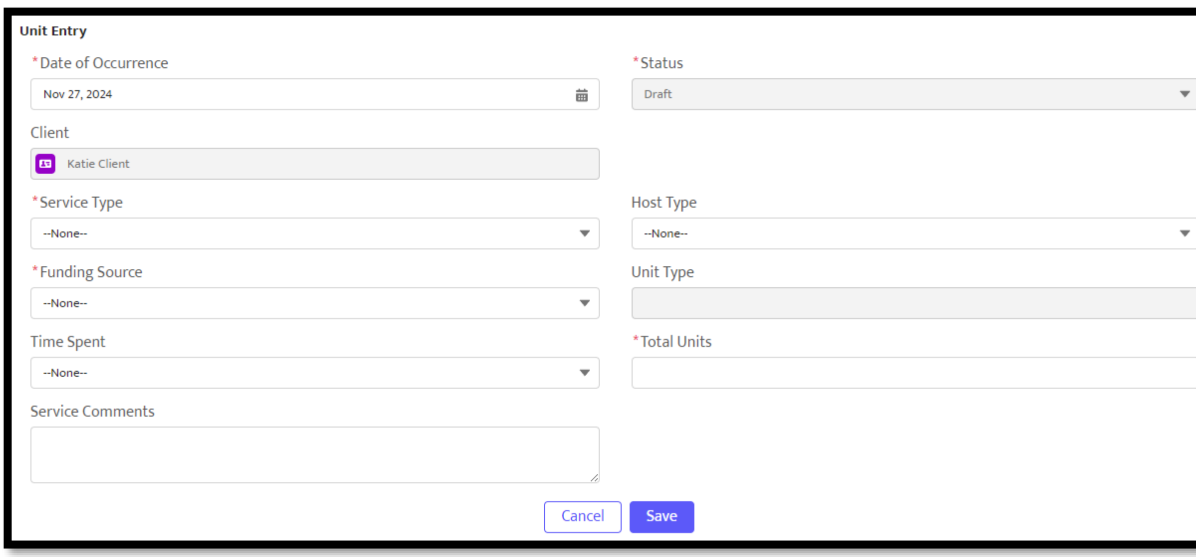
Step 1: From the **Top Menu**, click **Client Search**, find the desired client and click their name link.

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.



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



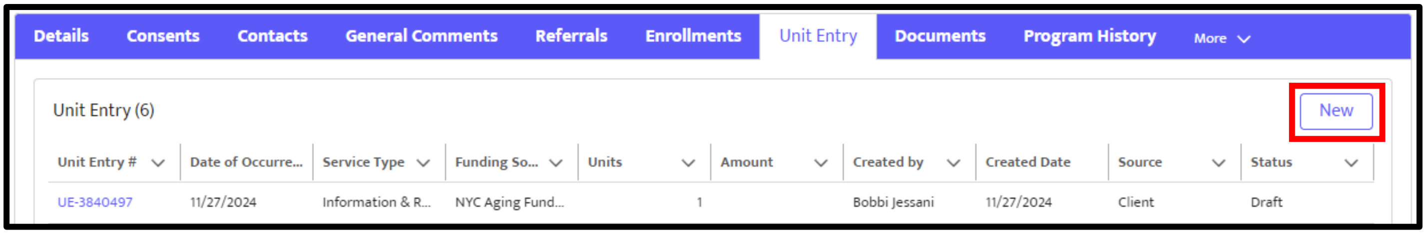
NOTE: *Units are in draft status until the Monthly Unit Summary is finalized. More on that below.*

Entering Units via the Details Menu

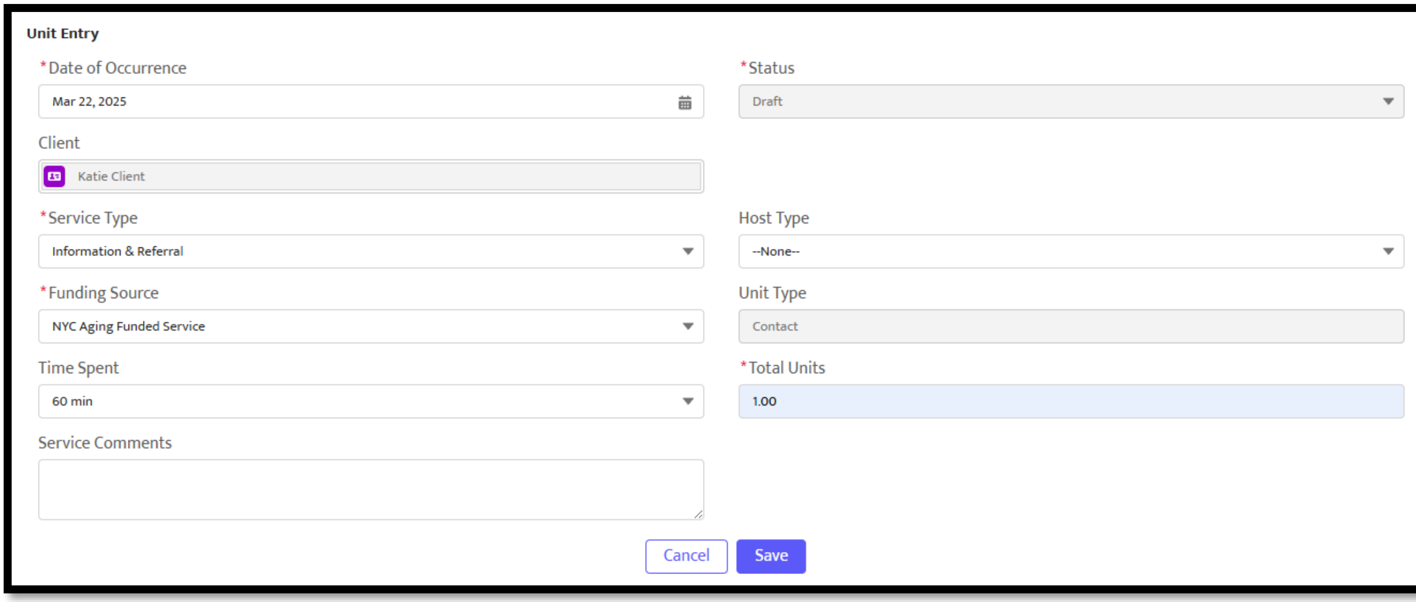
Certain service type units can be entered here entered from the **Details Menu** (also referred to as, Client Profile). For example, Information & Referral (I&R) unit types can be entered here. For other unit types for enrolled clients, access **Units Entry** from the **Enrollment Details Menu**.

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

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



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



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

Entering Units from the Enrollment Details Menu

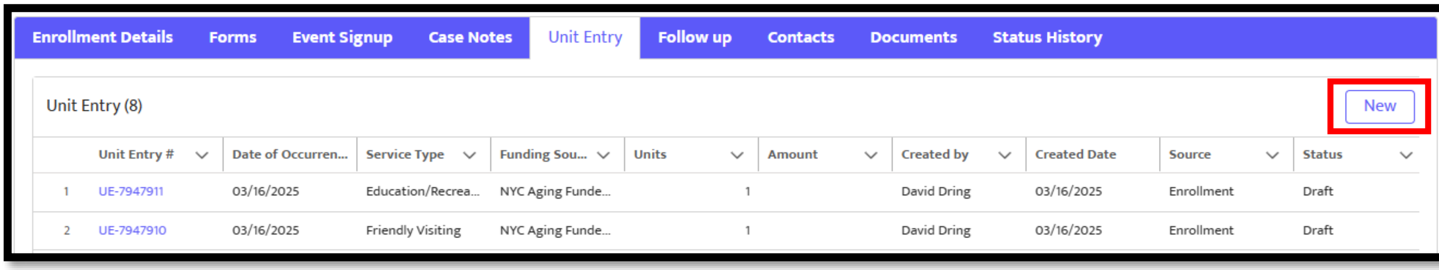
Enrollment units are specific to your programs and services. From the **Enrollment Details Menu** you are entering units specific to your client.

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

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

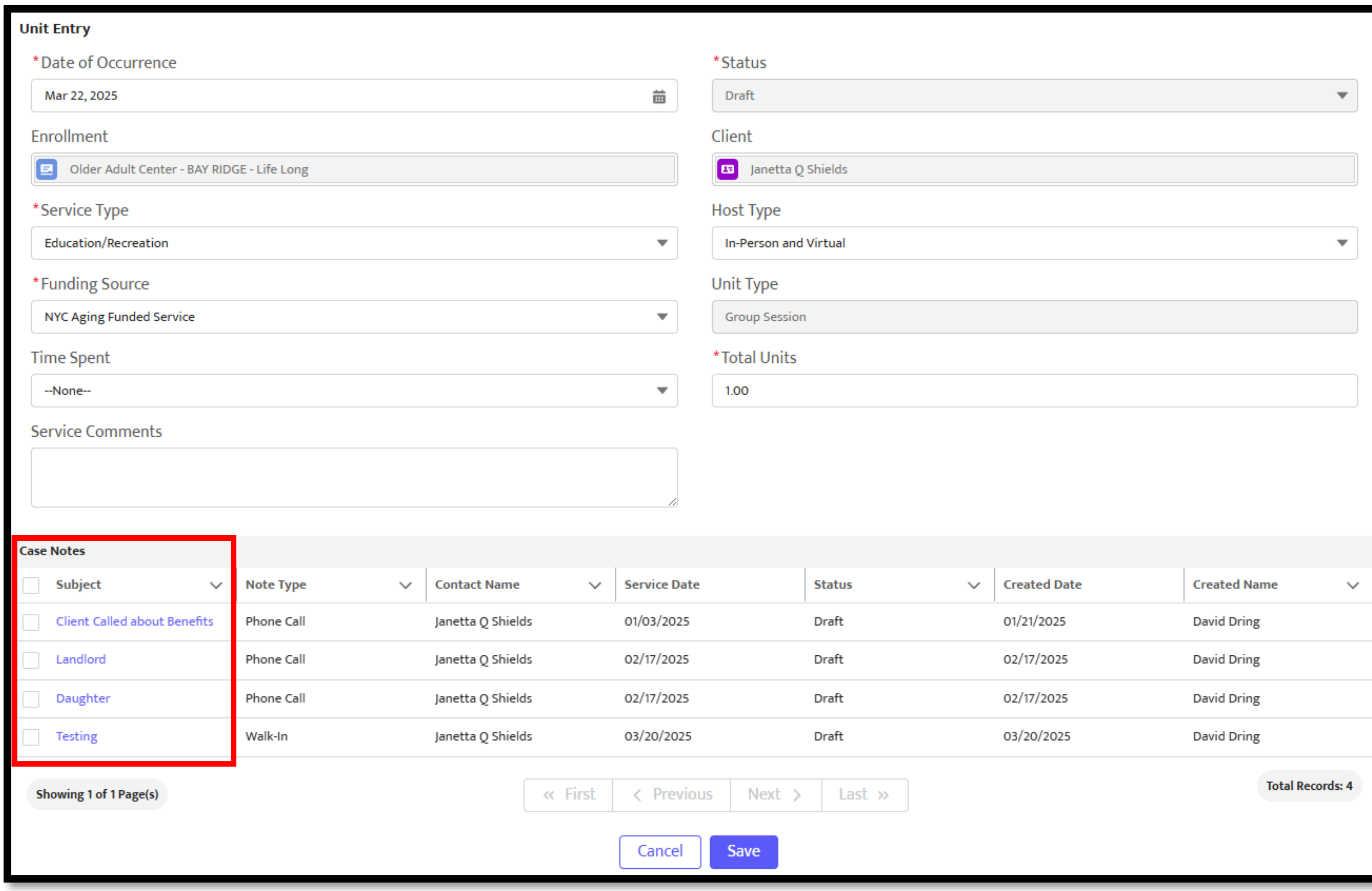
Step 4: Select the **New** button.



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

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

Step 7: Select **Save**.



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

Editing Units from Enrollment Details Menu

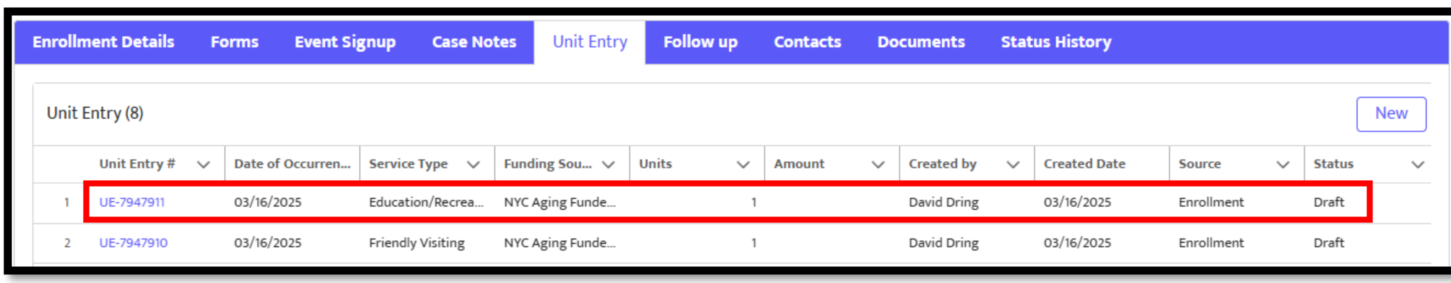
From the **Enrollment Details Menu** you are editing units specific to your client. You can only edit draft units. When units are finalized on the Monthly Unit Summary, all unit entry fields will be locked and can no longer be edited. . To unlock the Monthly Unit Summary after it has been finalized,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

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

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

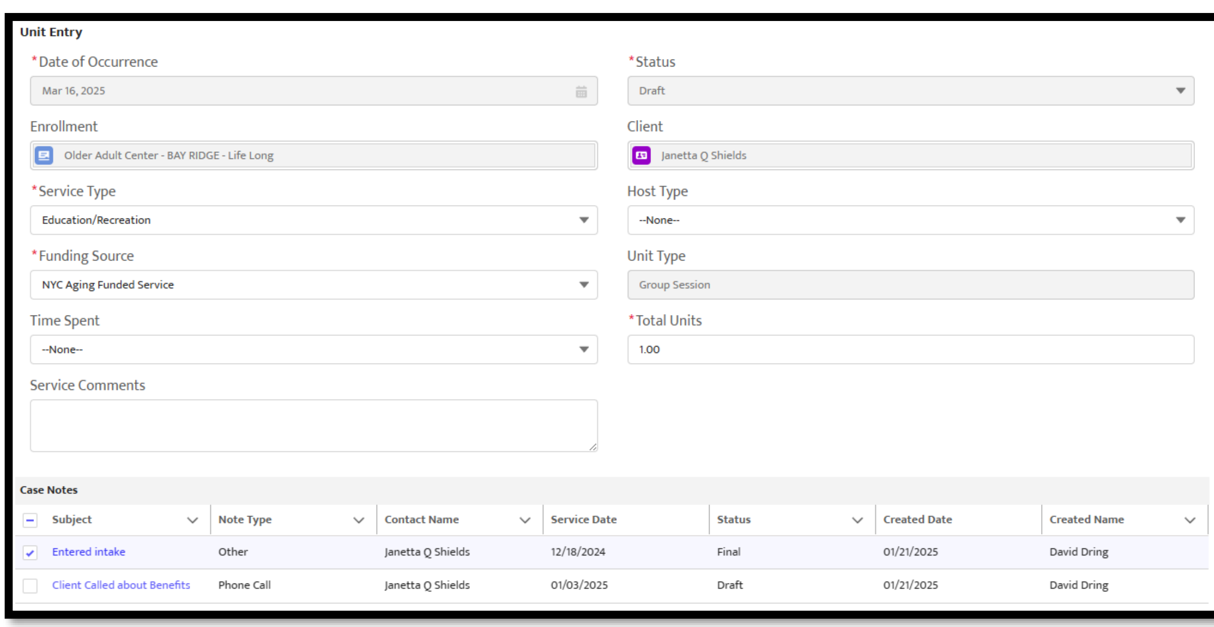
Step 3: From the **Enrollment Details Menu**, click the **Unit Entry** tab. Depending upon your window's width, you may have to select More to access Unit Entry from that dropdown menu.

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



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

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



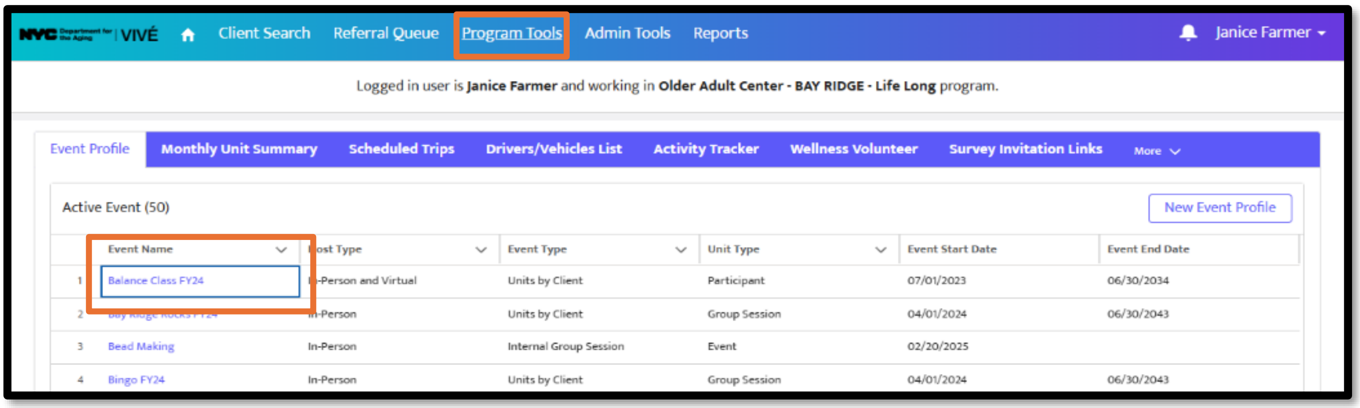
Entering Units from Program Tools

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

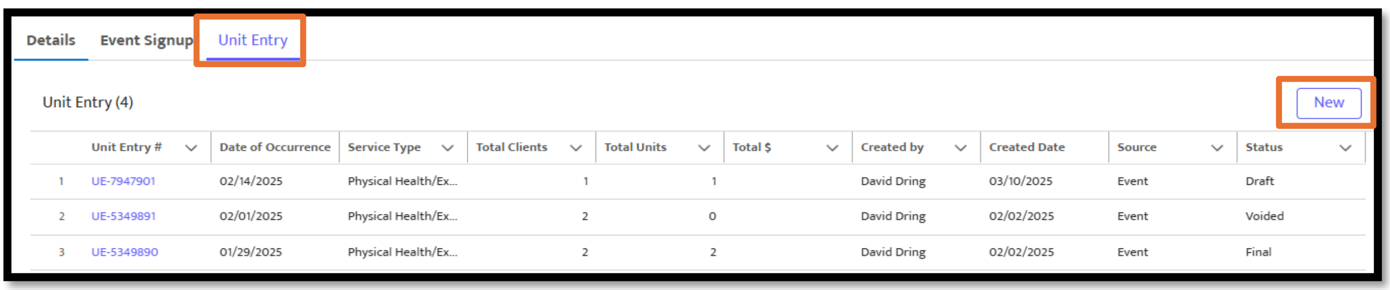
Step 1: From the **Top Menu**, click **Program Tools**.

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

Step 3: Click a Event Name link.



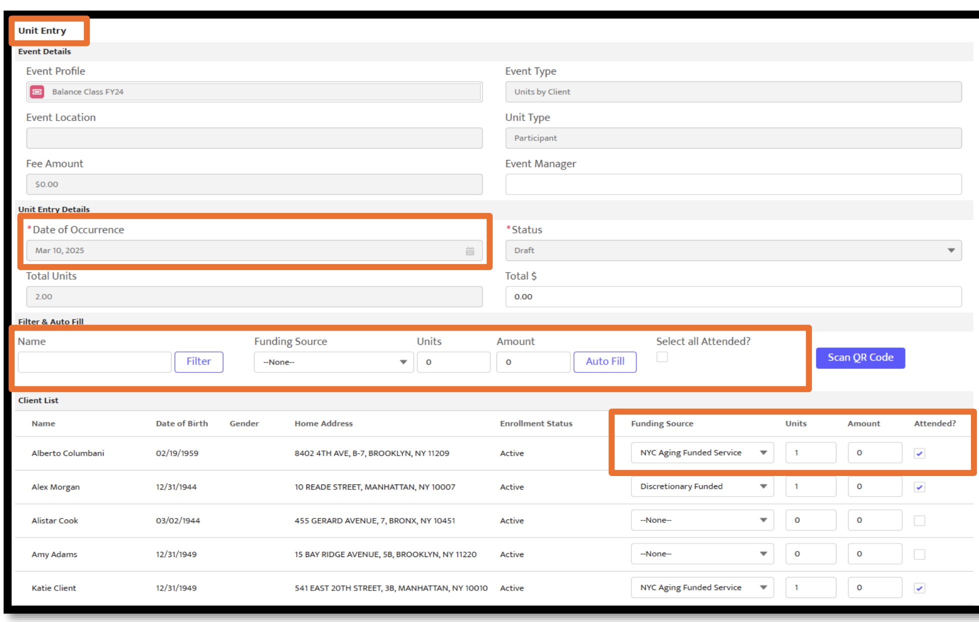
Step 4: Click the Unit Entry Link from the sub-menu. Select the **New** button.



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

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

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



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

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

Editing an Existing Unit Entry via Program Tools

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

Details | Event Signup | Unit Entry

Unit Entry (4)

New

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

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

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

Entering Units by QR Code Scanning

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

Anonymous Unit Entry

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

Voiding a Unit

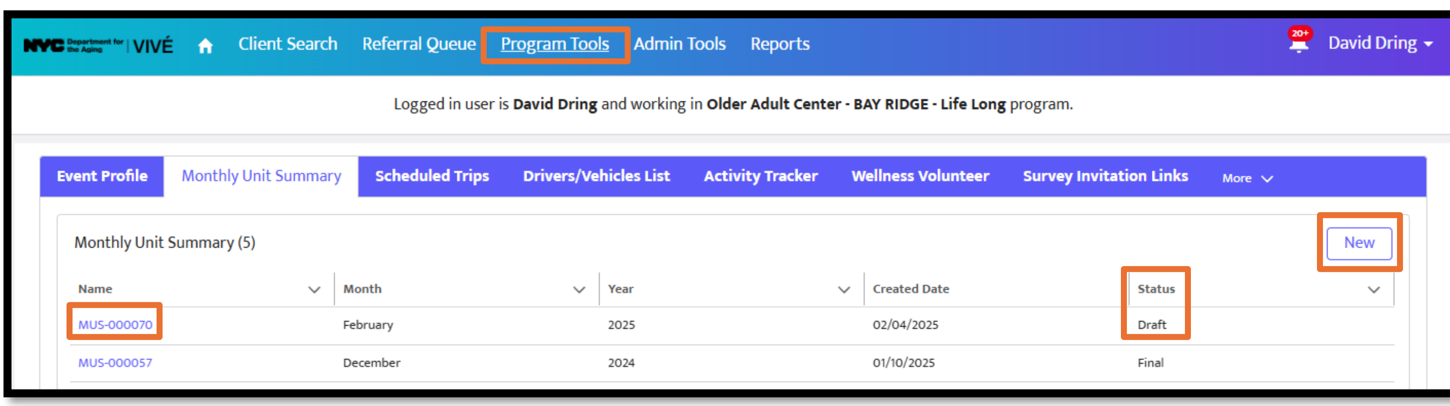
The process of voiding a unit is similar for all three pathways to unit entry. However, units can only be voided if they are in the draft status. Once a Monthly Unit Summary is finalized units cannot be voided. At the bottom of each Unit Entry details page, is a **Void Unit** button. Select it and the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

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

Monthly Unit Summary

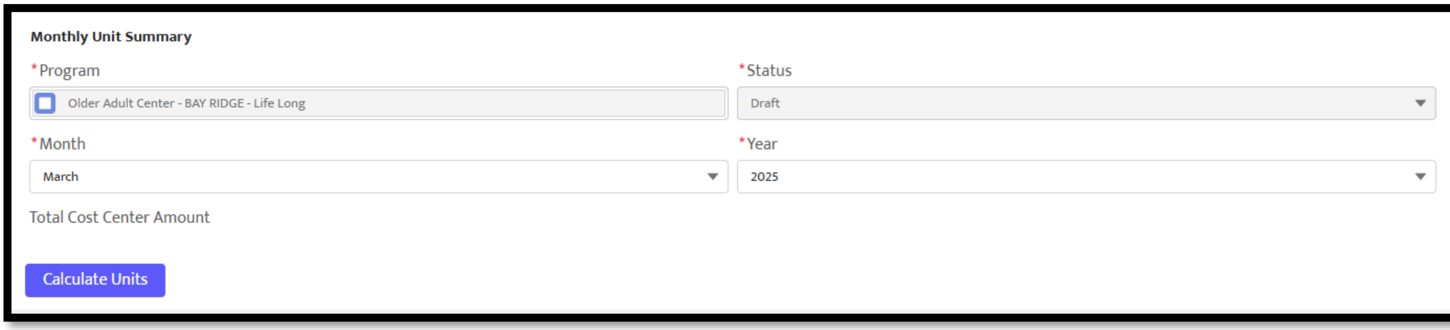
The Monthly Unit Summary reports the summary of units recorded in a month. Once you have confirmed these amounts, then you must finalize the report. ***Once a report is finalized, units can no longer be entered or edited. If you need to unlock a Monthly Unit Summary, contact your program officer.***

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



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

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



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

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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

- 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:

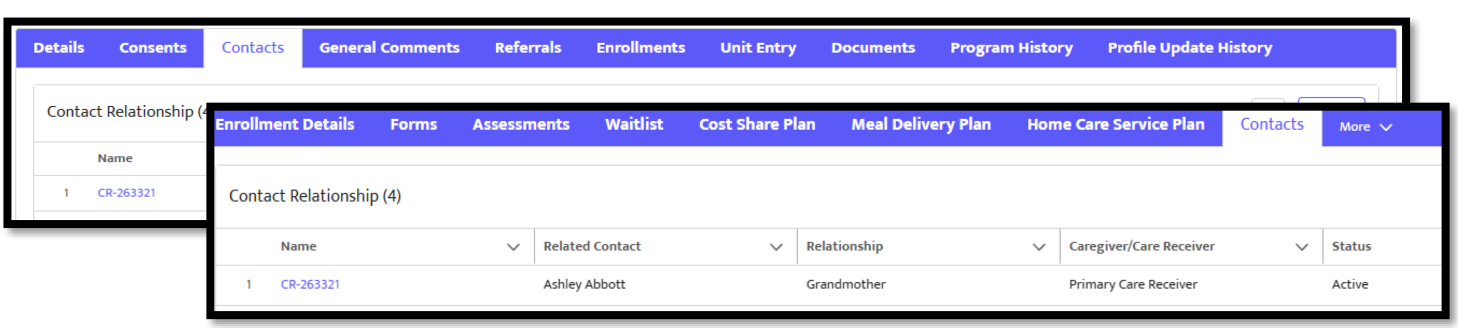
- **Client**: A person who is or has been enrolled in at least one NYC Aging program.
- **Contact**: A trusted person known to the client but not enrolled in an NYC Aging program.
- **Professional**: A service provider for the client, such as a doctor, pharmacy, or other professional.

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.



Associating Contacts with Your Client

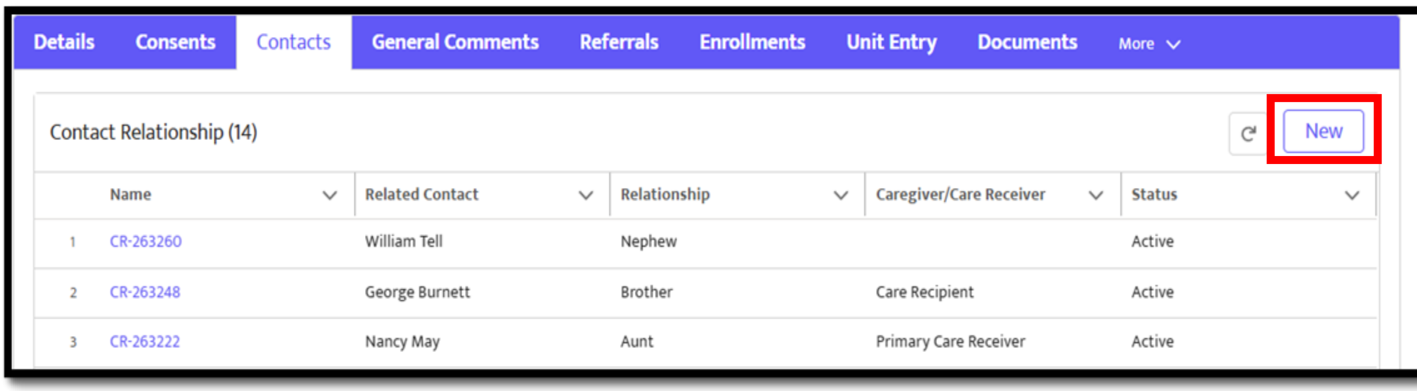
As there are three types of contacts, there are three pathways to associate them with your client. However, each of these pathways start the same way: searching for an existing contact.

First Check to See if the Contact Already Exists

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

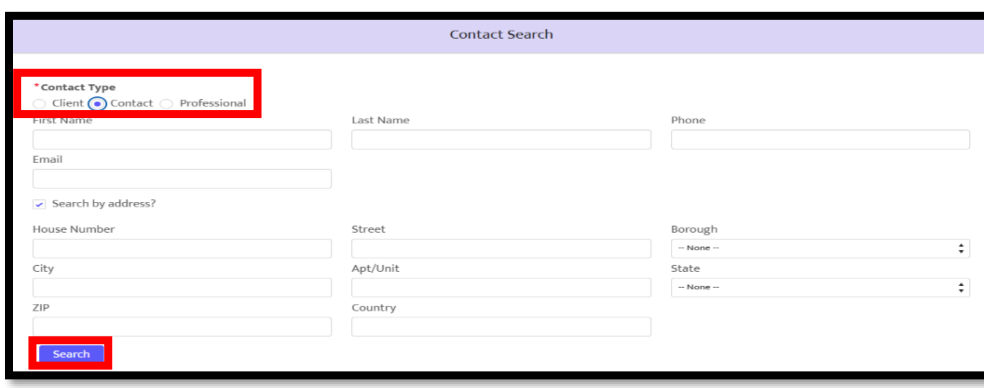
Step 1: From the **Top Menu**, click **Client Search**, click the desired client's name. Then, click the **Contacts** tab.

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



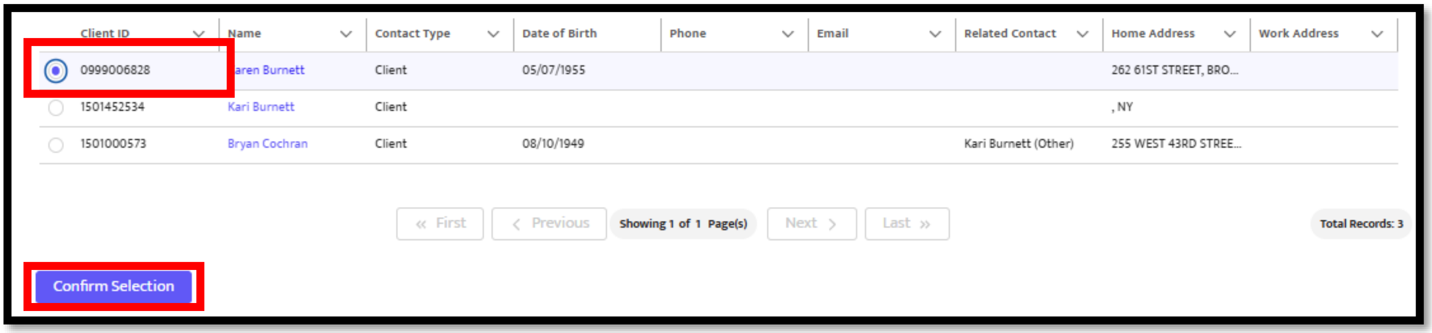
Step 3: Search to either find a match or confirm there isn't one to begin entering a new contact.

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

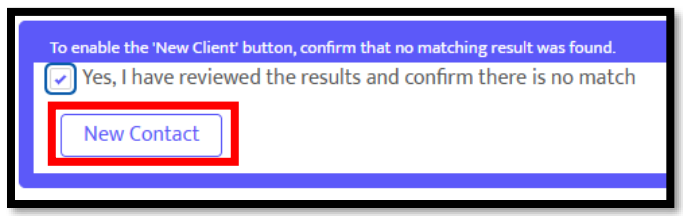


- To include a search by address, check the **Search by Address** box and enter the address.
- Select the **Search** button once all relevant information is entered.

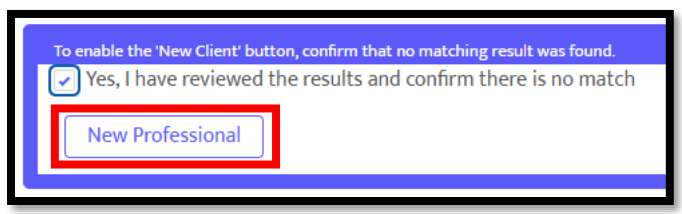
The search results for each type share the same selection process. There is a radio button to the left of an existing contact. Check that then select the **Confirm Selection** button to associate that person with your client. See below for more details on how existing contacts are associated with your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



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



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



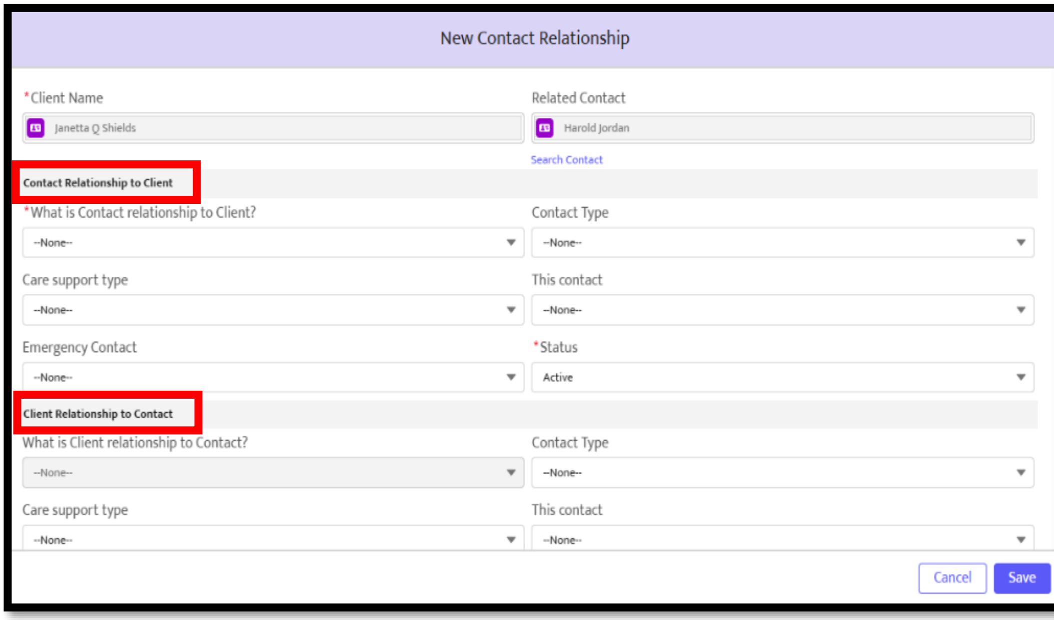
NOTE: *If the contact is not found via a Client type search, then proceed to searching the other types. You can search for only one type of contact at a time. Also, you are not able to enter a new client via Contacts.*

Associating an Existing Client as Your Contact

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

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

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



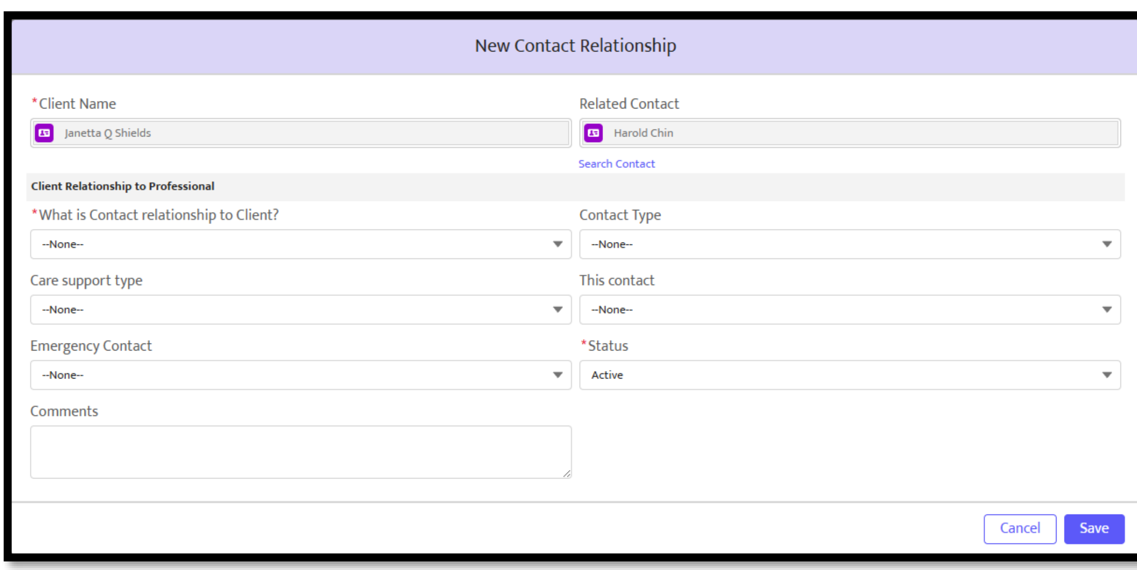
NOTE: *When you add a Client as a contact for another client, the relationship is reciprocal—the added client will also have the original client listed as their contact.*

Associating an Existing Contact

The **New Contact Relationship pop-up** for existing Contacts has fewer questions.

Associating an Existing Professional

The New Contact Relationship pop-up for existing professions has the least number of questions.

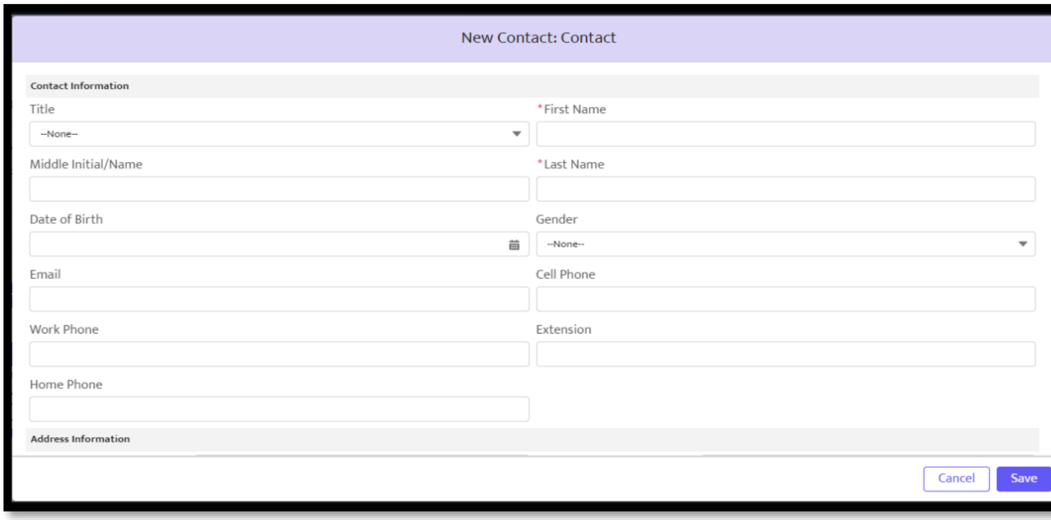


Entering in New Contacts

You can only enter in new Contact and Professional contact types. Each follow a different pathway when entering a new contact.

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

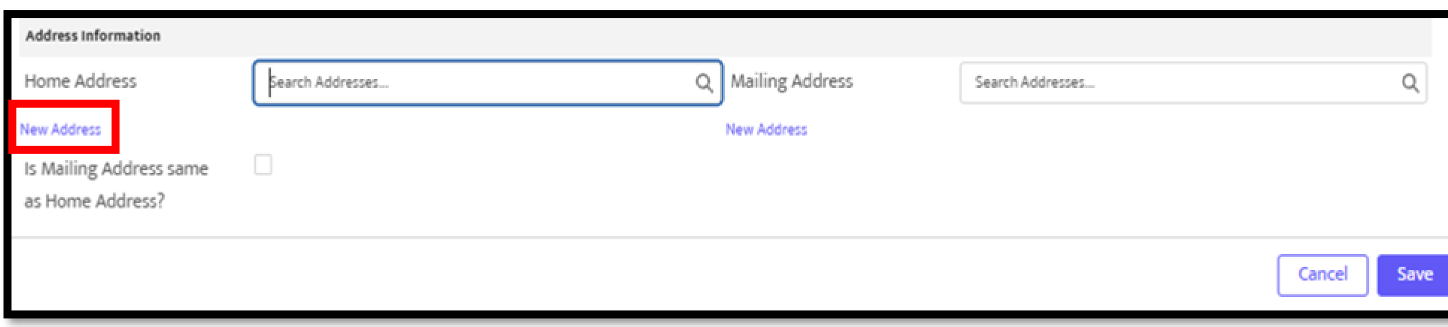
Step 1: After confirming no matches and selecting the New Contact button, complete the New Contact: Contact pop-up.



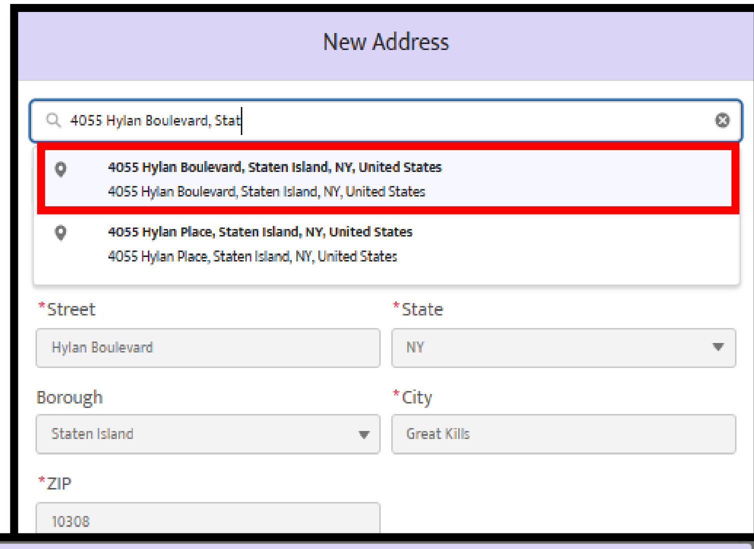
Step 2: While not required, it's best practice to always enter a phone number and an email address.

Step 3: Scroll down the page and enter the address.

Step 4: If the address cannot be found within the Search Address box, click **New Address**.

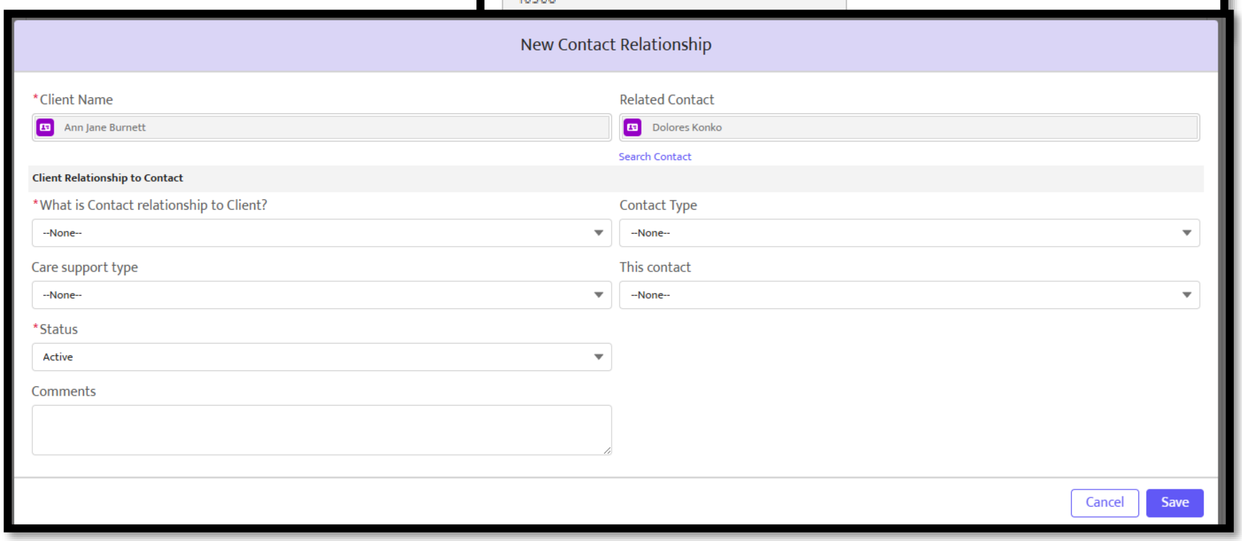


Step 5: When entering a new address, the type-ahead technology speeds finding address. Once you've found it, click on it and the details will autofill the fields. Review the entry to be sure all information is included, especially apartment information.



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

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

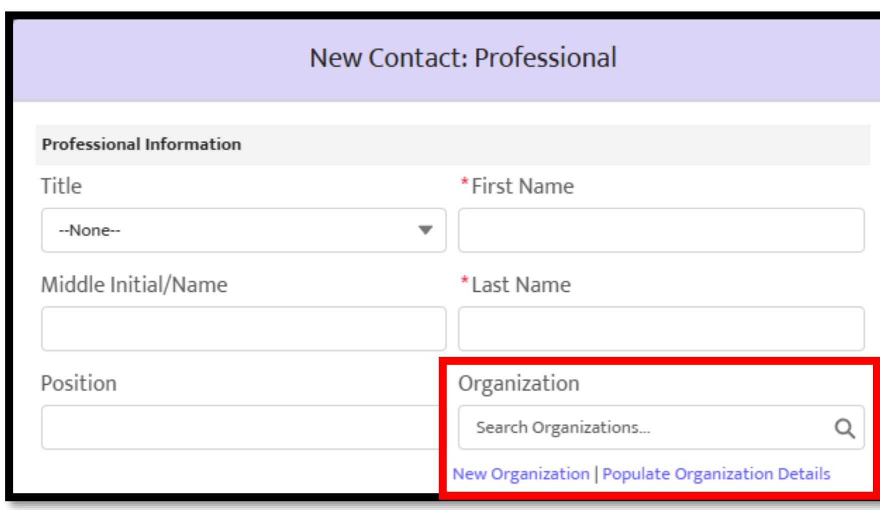


Entering a New Professional Contact

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

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

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

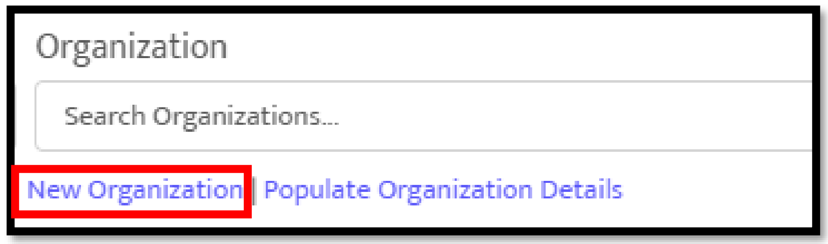


Step 3: Use the type-ahead technology to find organizations previously entered or click on **New Organization**.

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

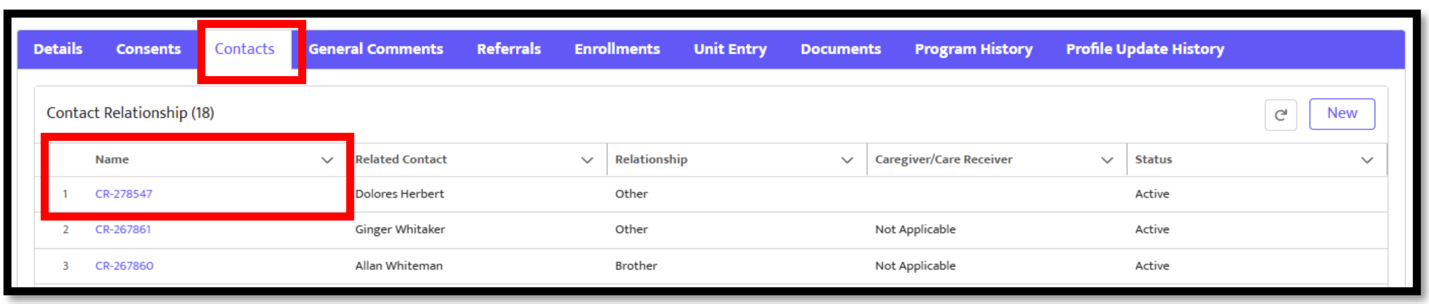
Enter a New Organization

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

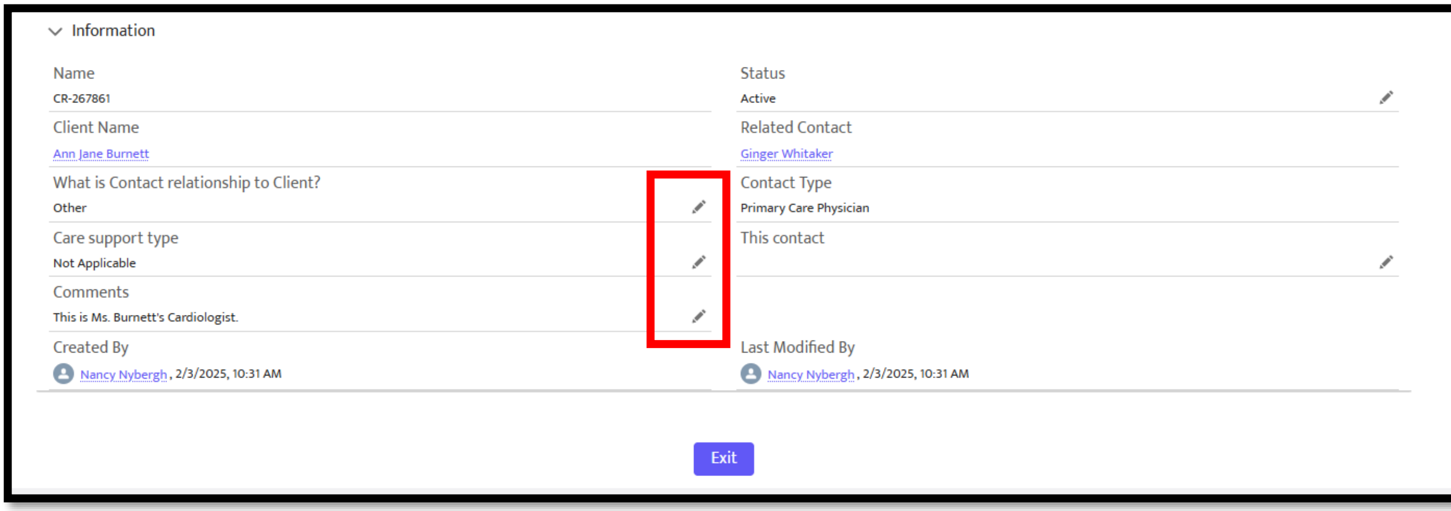


Editing Contacts

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



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



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

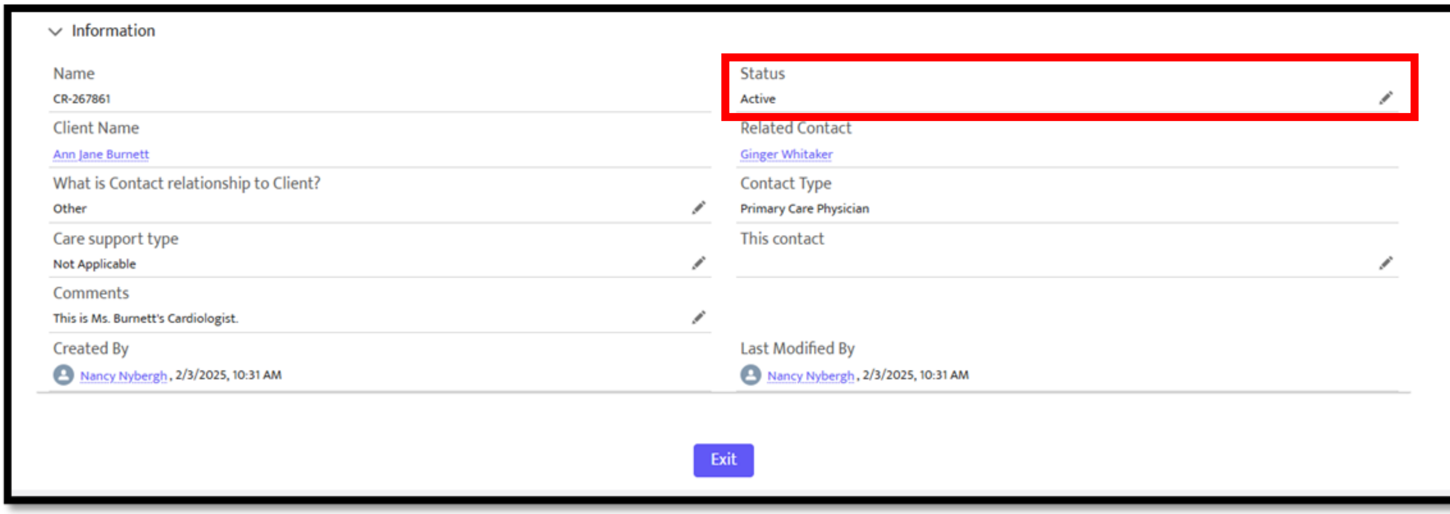
Inactivating Contacts

Inactivating a contact has the following impact:

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

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

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



Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

Return to VIVÉ Knowledge Base

[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:

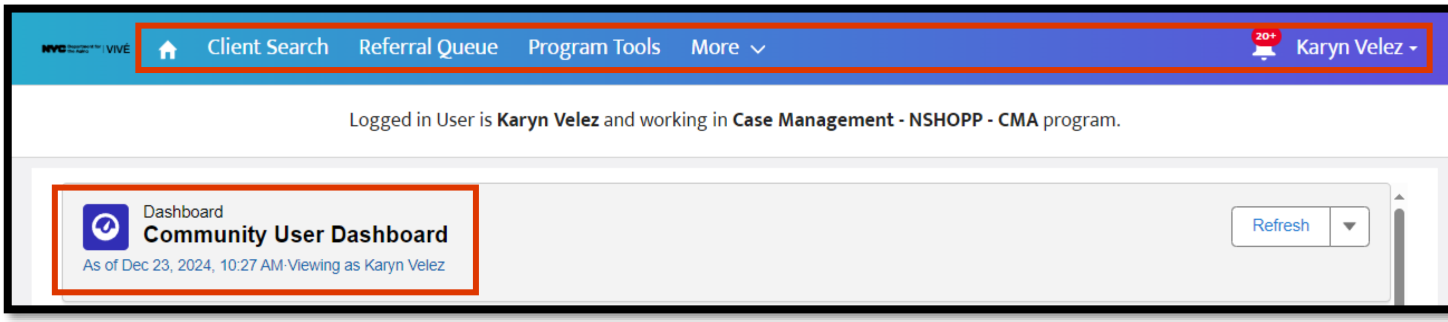
- **A Dashboard Overview**
  - The Top Menu Navigation
    - Notifications
    - User Name Profile
    - Refresh Button
- **My Enrollments**
  - Accessing the Client Profile
  - Accessing Enrollment Menu
- **My Follow-Ups**
  - Accessing the Follow-Up Request Screen
- **My Tasks**
  - Accessing the Task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

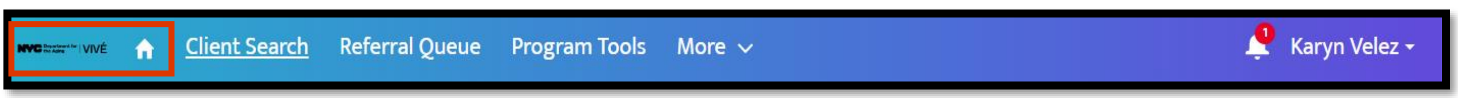
The **Dashboard** will be the first page to appear once you have logged into VIVÉ. Below are details of key navigational elements and details of their features.



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.



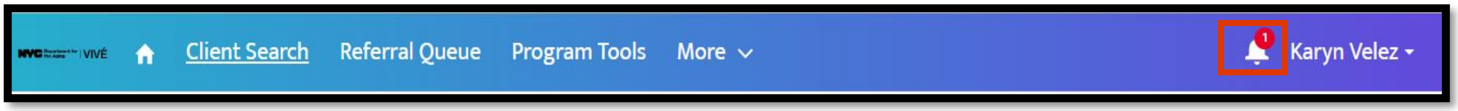
These are the critical links from the **Top Menu**:

- **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 funtionality is specific to route management of Home Delivered Meals programs.

Notifications

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

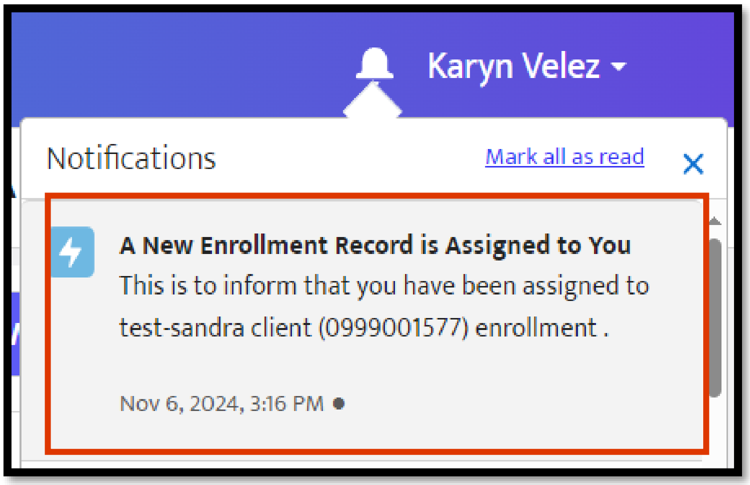


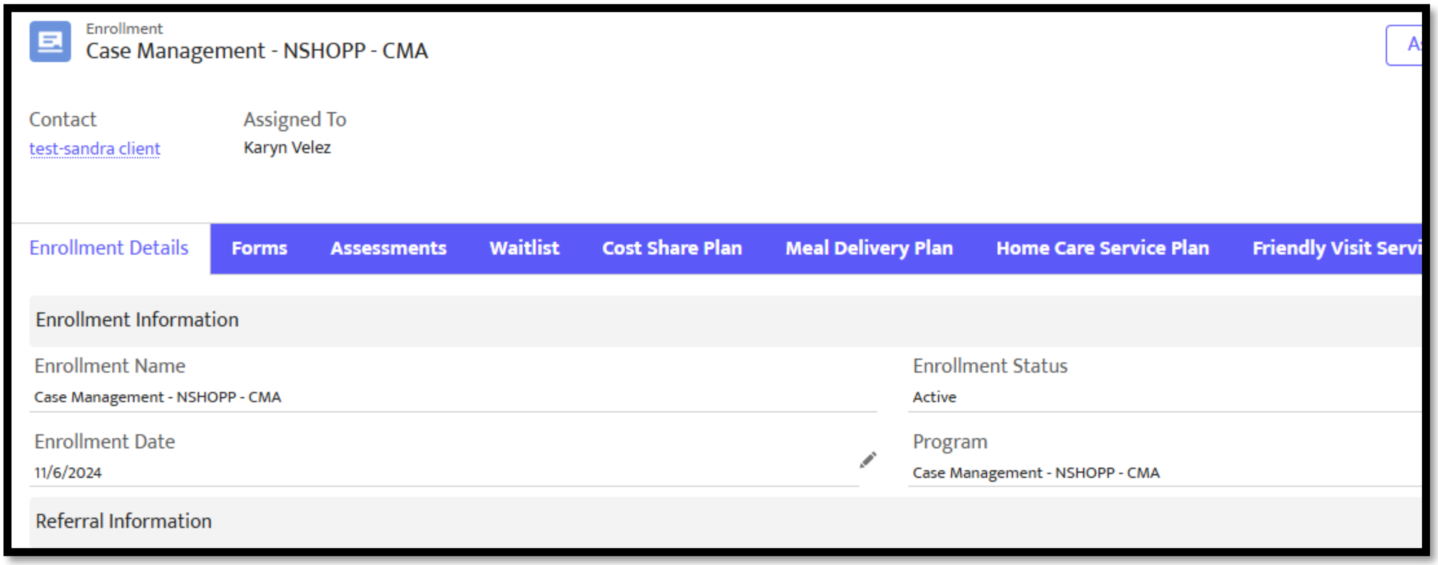
To view and access **Notifications**:

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

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

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



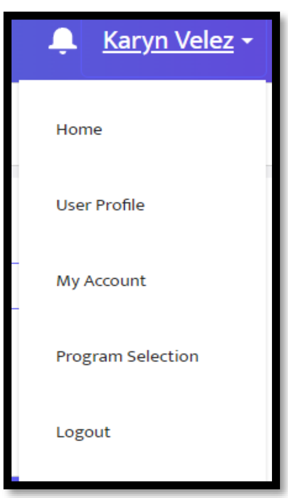


Notifications are ordered so that the most recent one appears at the top of the list. If you want to view others, scroll down.

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

User Name Profile

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



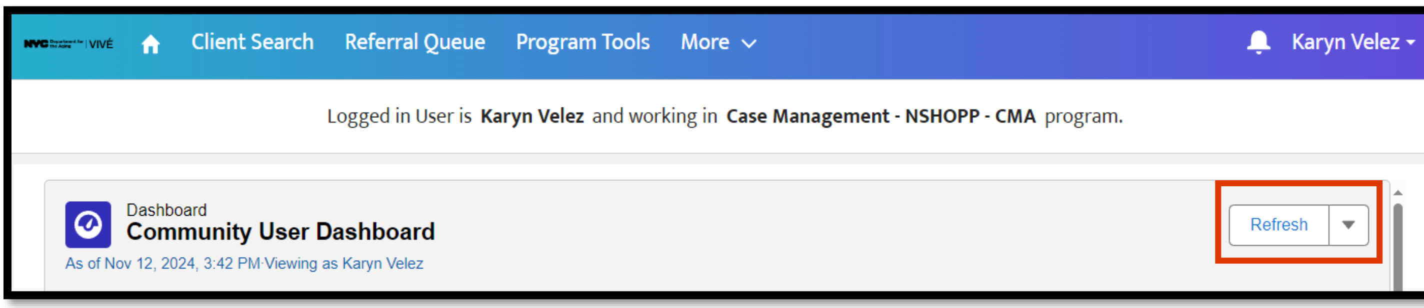
- **Home** – This functionality is used to bring you back to the **Dashboard** from any screen page in VIVÉ.
- **User Profile** – This functionality provides access to information about you including your 1) title, 2) supervisor's name, 3) email address, 4) company name, telephone number and address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

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

Refresh Button

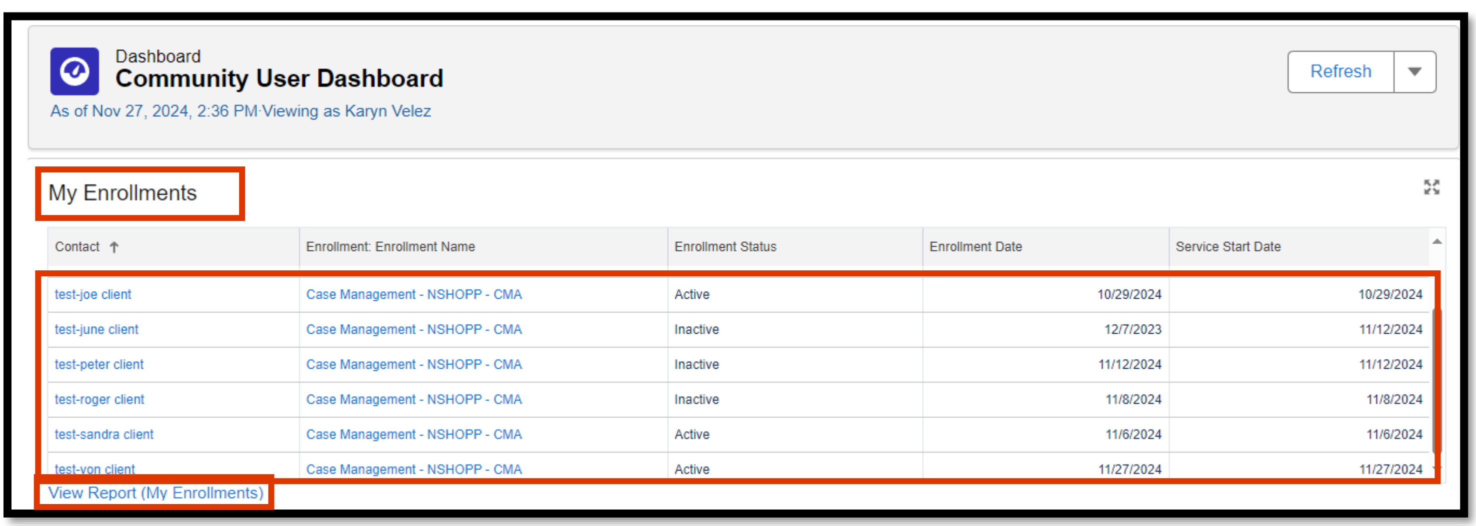
The **Refresh** button is used to "refresh" the various sections of the **Dashboard** page – **My Enrollments**, **My Follow-Ups** or **My Tasks**. Updates could include a listing of a newly assigned client or follow-up request. Also, the **Refresh** button will update any status changes with an enrolled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

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



My Enrollments

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

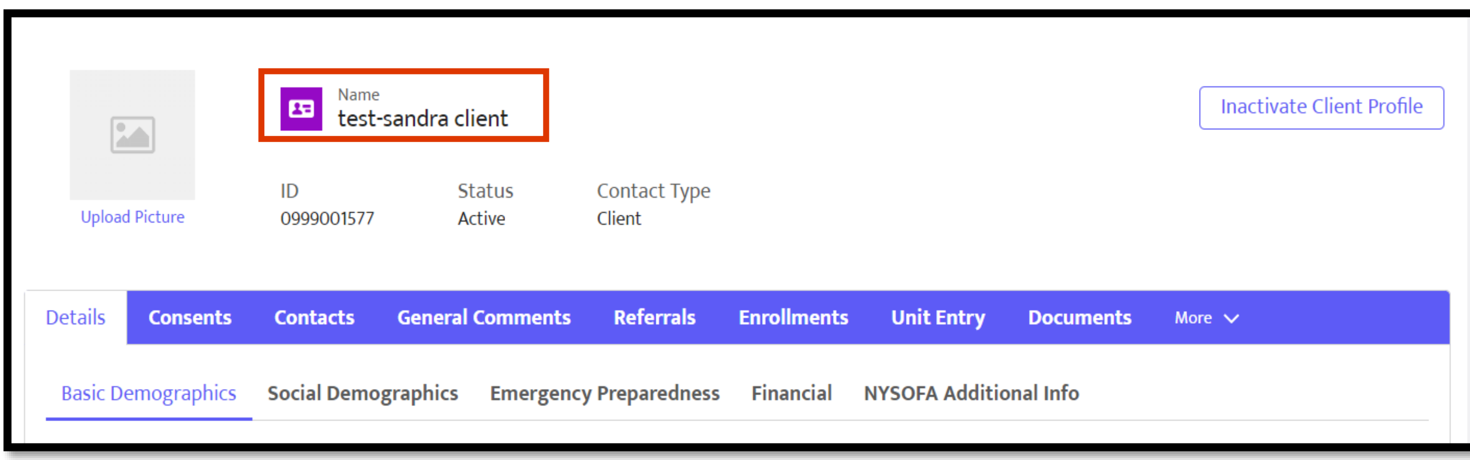


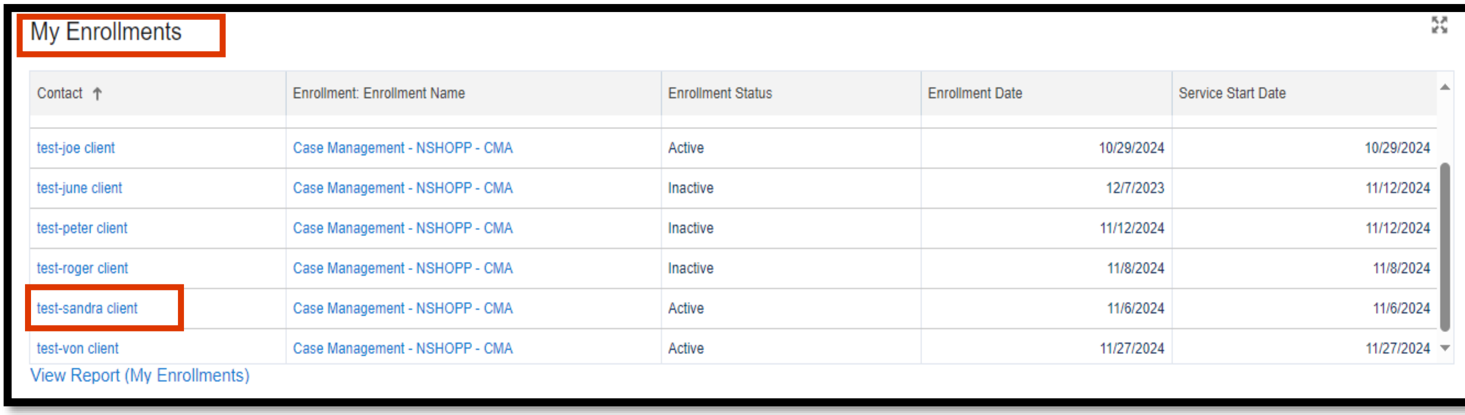
You can also review any reports associated with assigned clients on this portion of the page by clicking the hyperlink **View Report (My Enrollments)** at the bottom left. Finally, you can also access client files directly from **My Enrollments**.

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

Accessing the Client Profile

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





My Enrollments

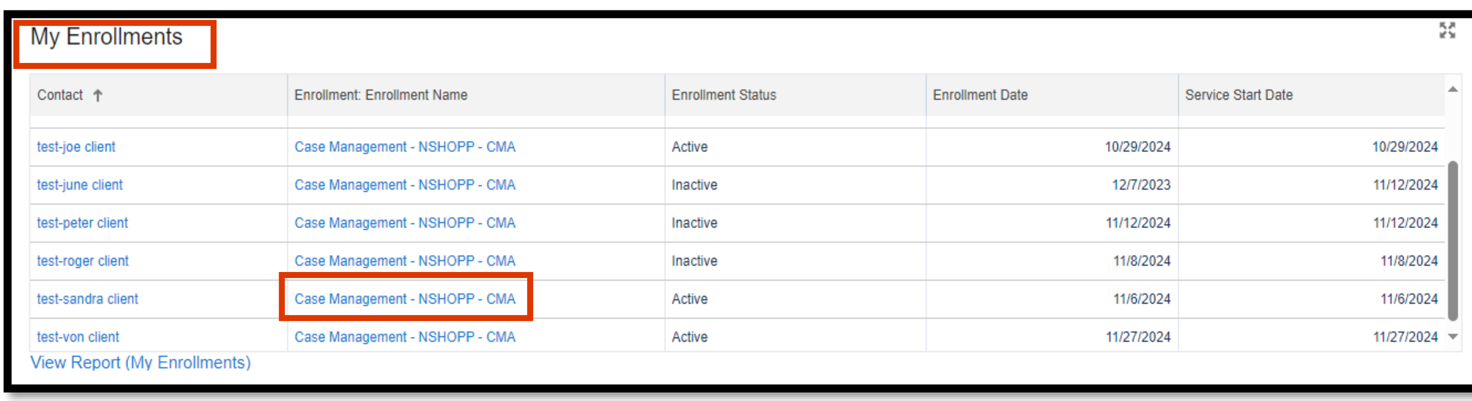
Contact	Enrollment: Enrollment Name	Enrollment Status	Enrollment Date	Service Start Date
test-joe client	Case Management - NSHOPP - CMA	Active	10/29/2024	10/29/2024
test-june client	Case Management - NSHOPP - CMA	Inactive	12/7/2023	11/12/2024
test-peter client	Case Management - NSHOPP - CMA	Inactive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

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)

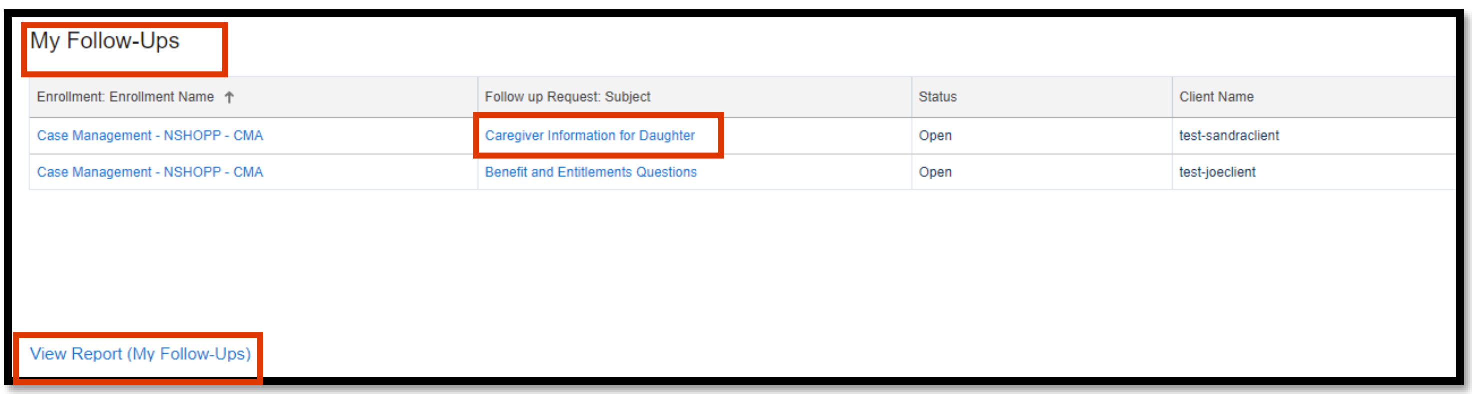
My Follow-Ups

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.

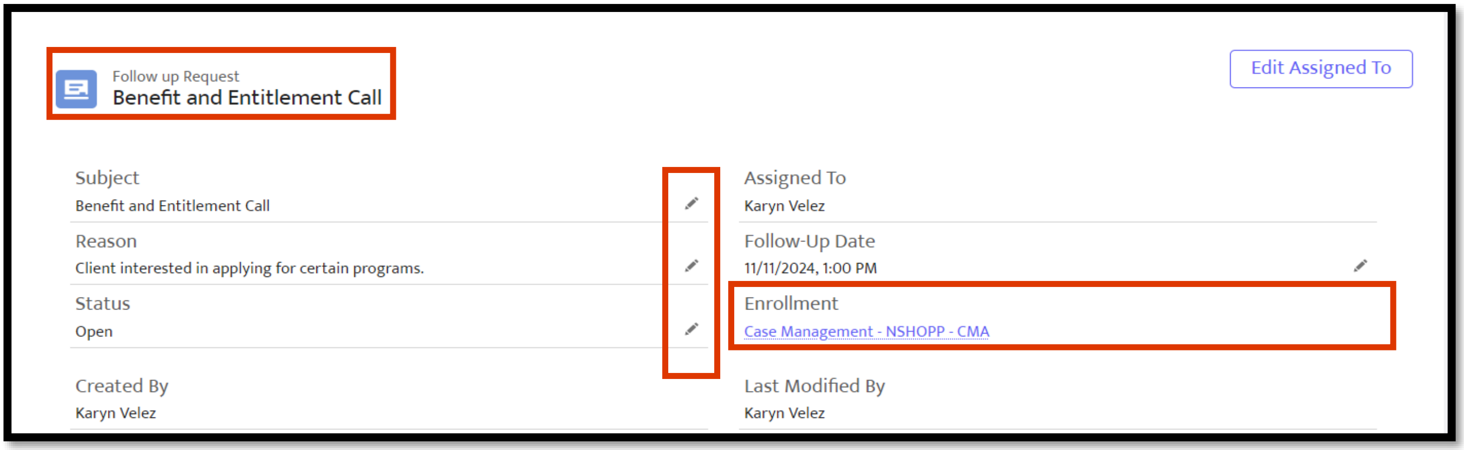
Accessing the Follow-Up Request Screen

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

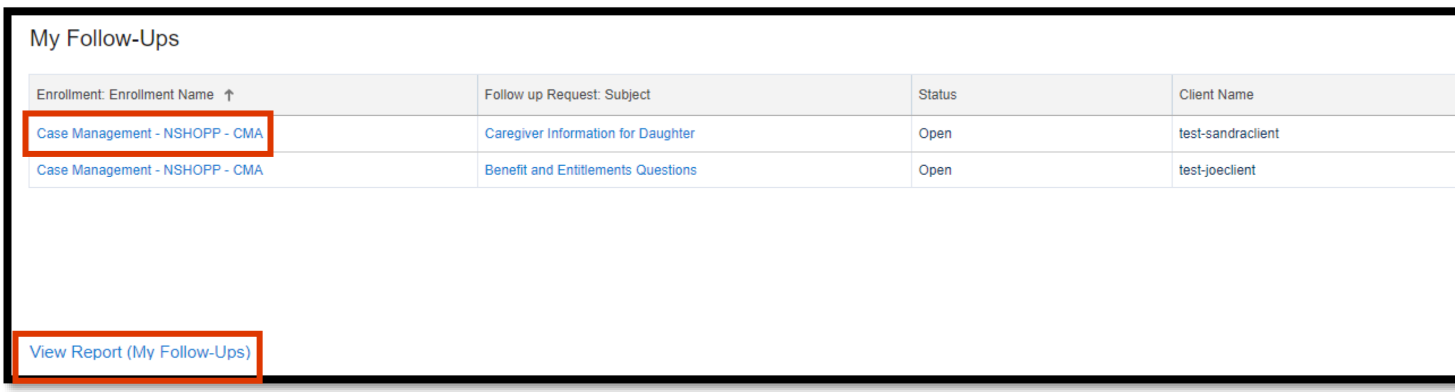


Once clicked, the **Follow-Up Request** screen will appear providing additional information, such as the reason for the request, the date and time the request is asked to be completed by and the person who created the request.

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

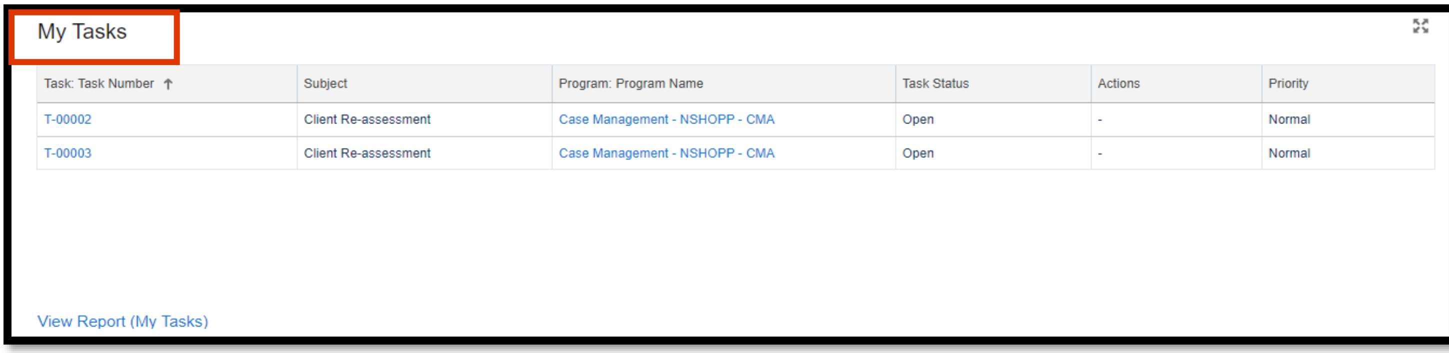


Also available from **My Follow-Ups** on the **Dashboard** is a link to the client's **Enrollment Menu**.



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.

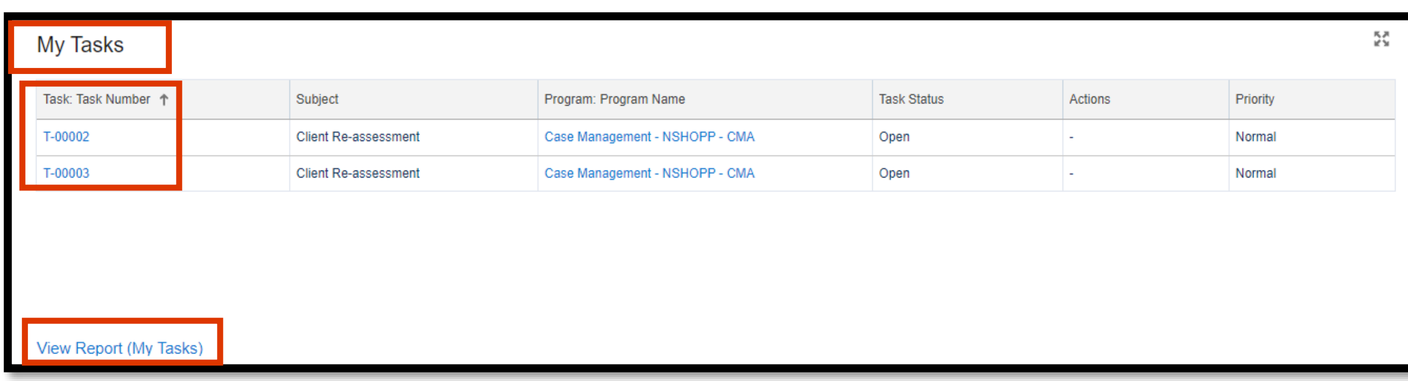


My Tasks displays information such as the type of client profile update needed, the **Task Status** (Open, In Progress or Closed), any **Actions** that have been taken regarding the task and the task's **Priority** level (Normal, Medium or High). In addition, under the heading **Task: Task Number**,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

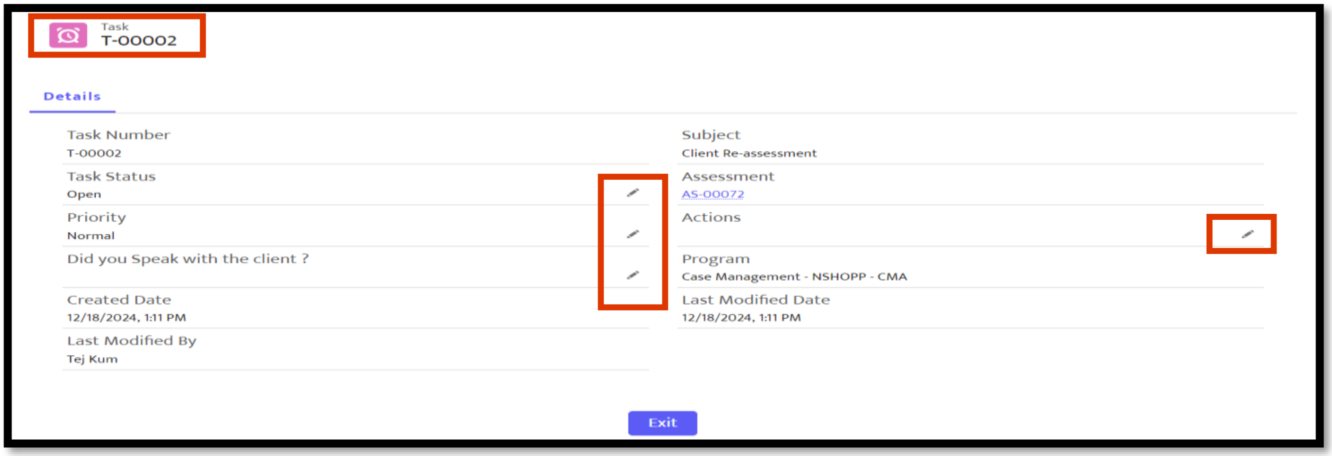
VIVÉ program users can also review a report on their **My Tasks** by clicking the link **View Report (My Tasks)** on the bottom left.

Accessing the Task Details

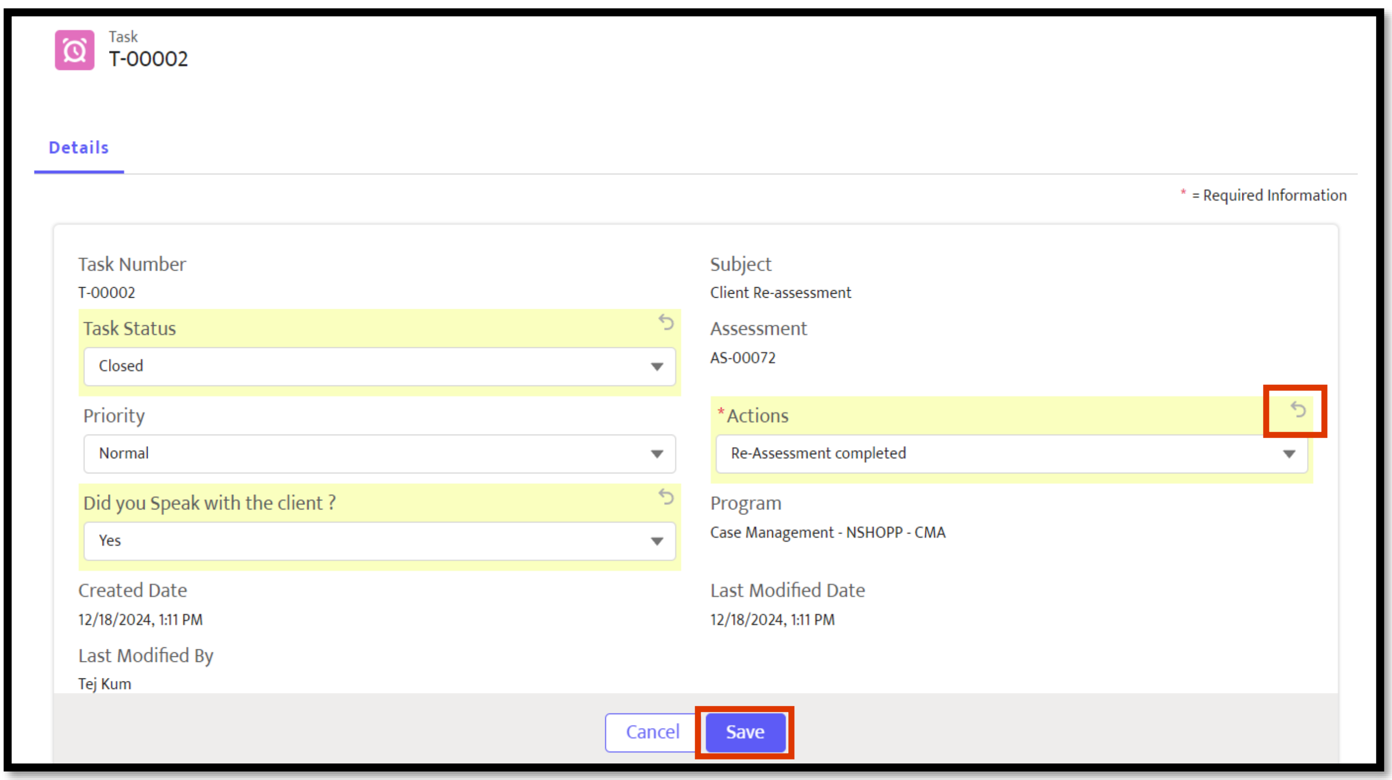
Step 1: From **My Tasks**, click the **Task: Task Number** link for the desired task. Once clicked, the **Task Details** screen will display related task information such as a hyperlink that directs you to the last Client Enrollment or **Assessment** created for the client. You will also be able to edit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



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



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



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

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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

Return to VIVÉ Knowledge Base

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 VIVÉSupport@aging.nyc.gov.

Overview of Documents

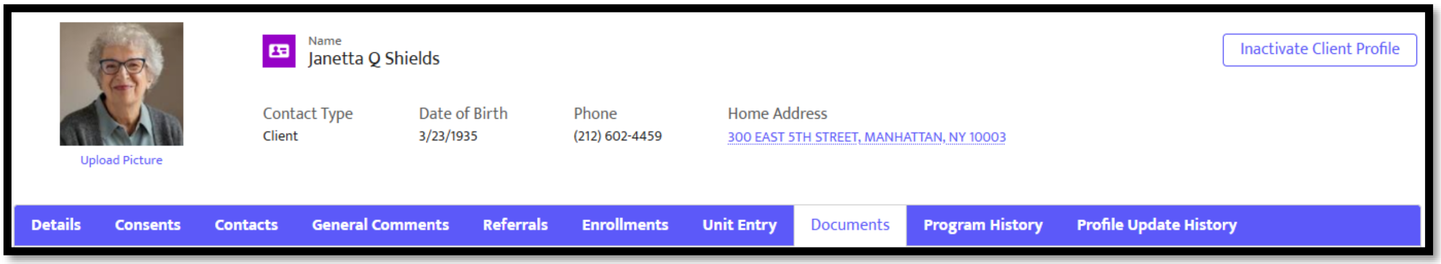
Documents featured in VIVÉ provides the ability for you to add, edit, and view a record of various document types associated with a client's file by uploading them into the database.

Navigating to Documents

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

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

Details Menu: Client Profile



Enrollment Details Menu

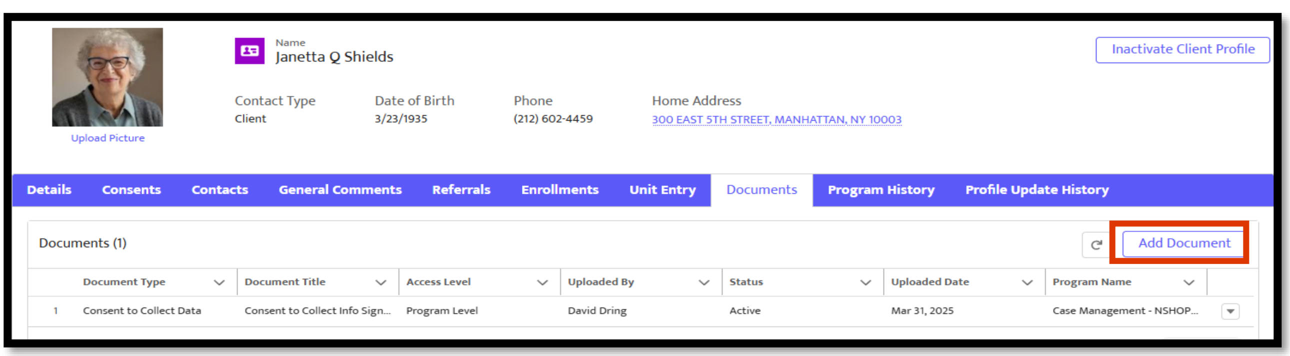
Adding Documents

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

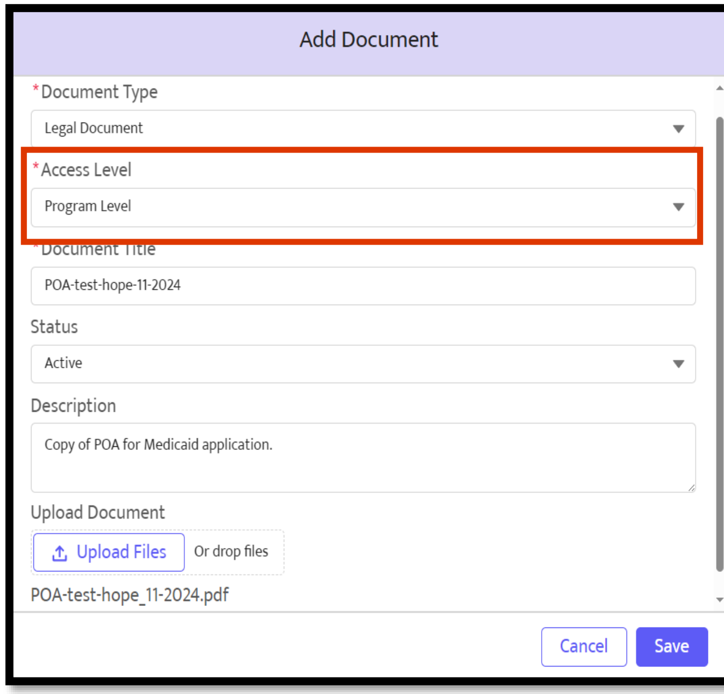
Step 1: From the **Top Menu**, click **Client Search**, click the client's name link.

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

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



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

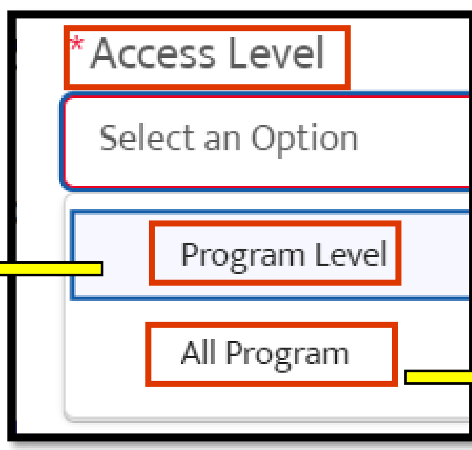


Access Level

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

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

Program Level access allows <u>only</u> staff within the program who added the **Document** to view or edit its status.

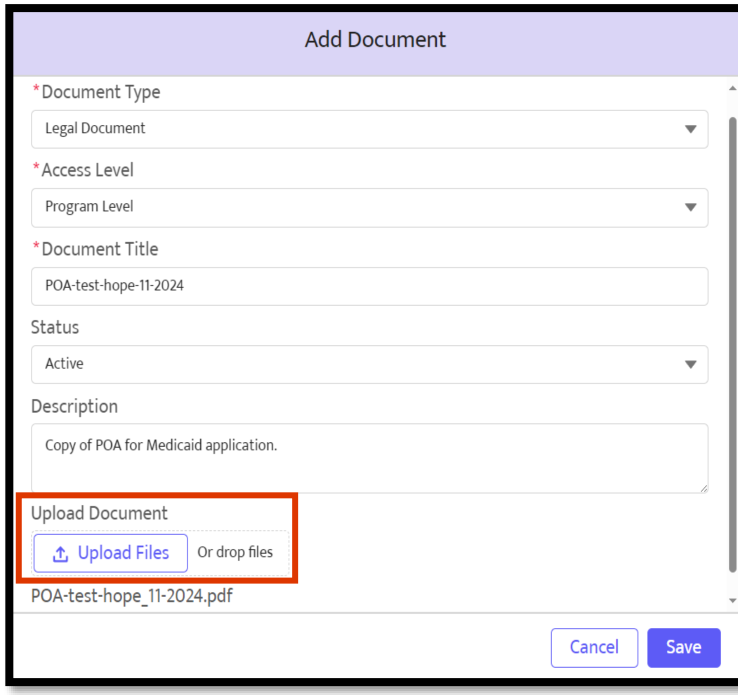


All Program access allows <u>any</u> contracted NYC-Aging program to view the uploaded **Document** or edit its status.

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

Upload Files

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



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

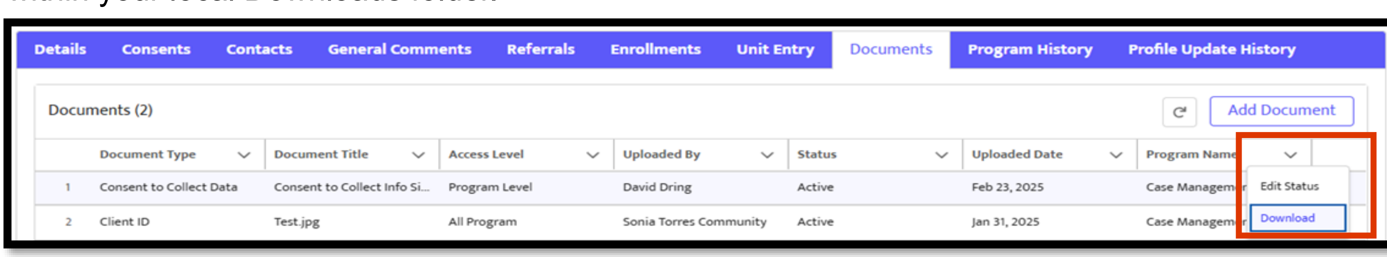
TIP: *Keeping various client documentation in one central location can be helpful when the need to access documents arises. Deciding to upload a client's documentation to the **Documents** feature on either the **Details** level or the **Enrollment** level, not both, may prove useful.*

Viewing / Editing Documents

View Documents

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

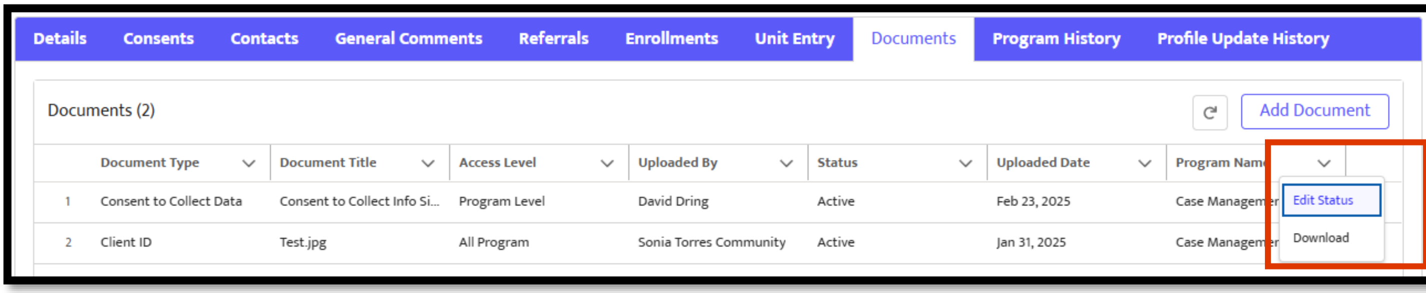
Step 1: Select the dropdown arrow and pick **Download**. Using the browser, the document is placed within your local Downloads folder.



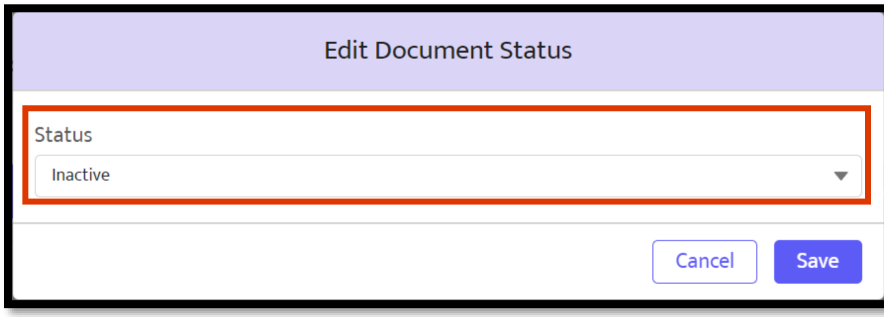
Edit Document Status

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

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



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



Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

Return to VIVÉ Knowledge Base

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VIVÉ Admin Tools Reference Guide

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

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

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

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

In this guide you will learn:

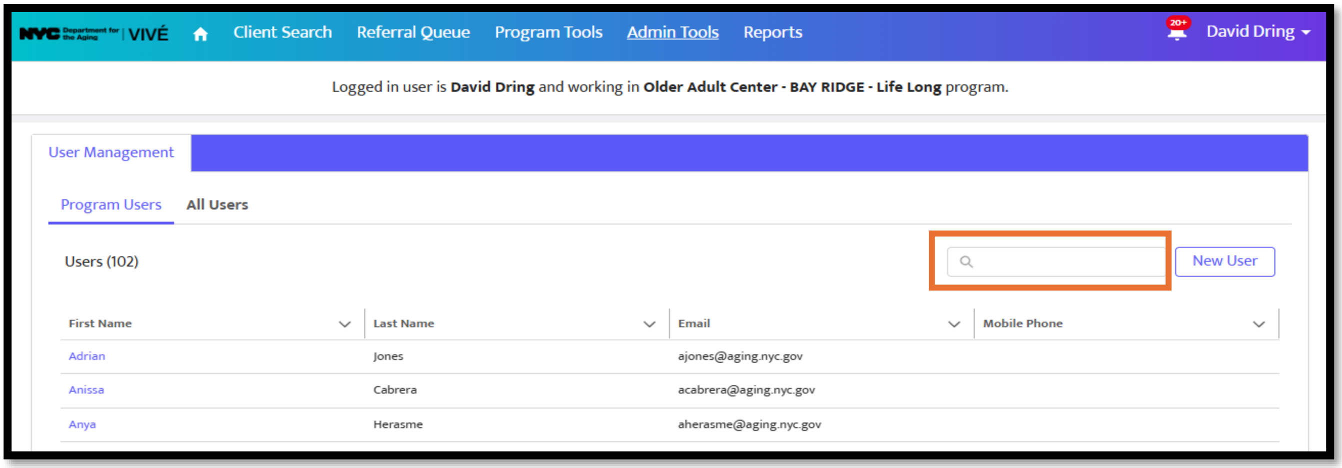
- **Accessing Admin Tools**
- **Viewing Users**
  - Searching for Users
- **Creating a New User**
- **Editing a User**
  - Editing Basic Information
  - Editing User Roles with Program Associations
- **Inactivating a User from a Program Association**

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

Accessing Admin Tools

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

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

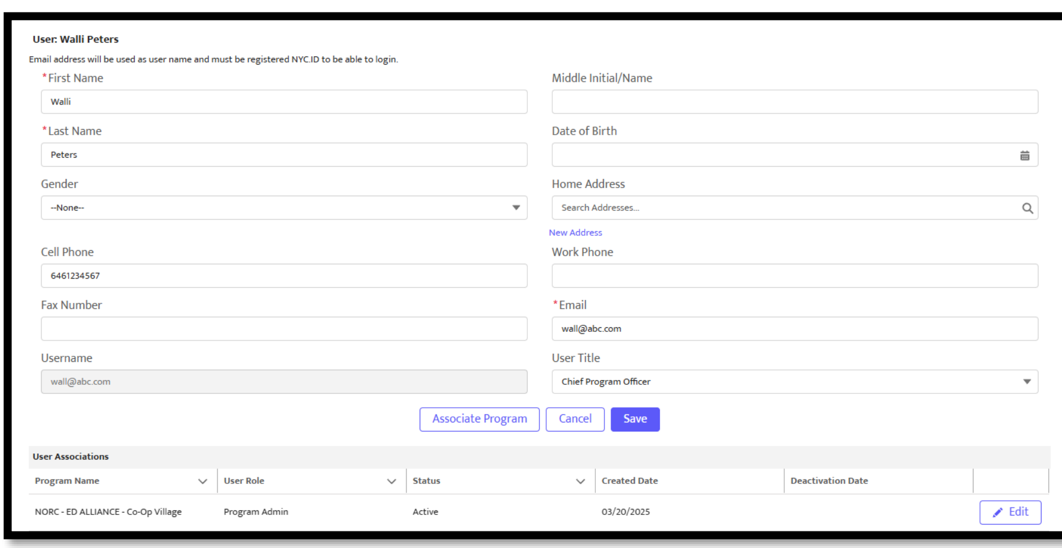


Viewing Users

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

Searching for Users

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



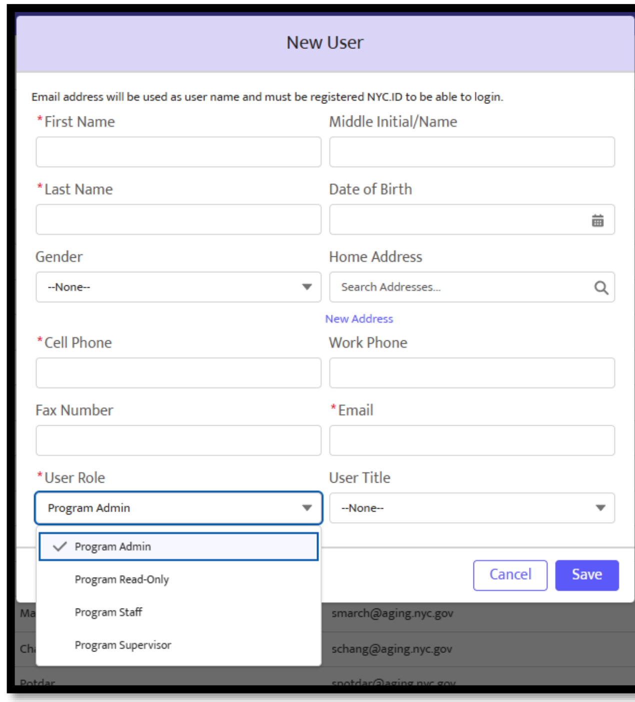
Creating a New User

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

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

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

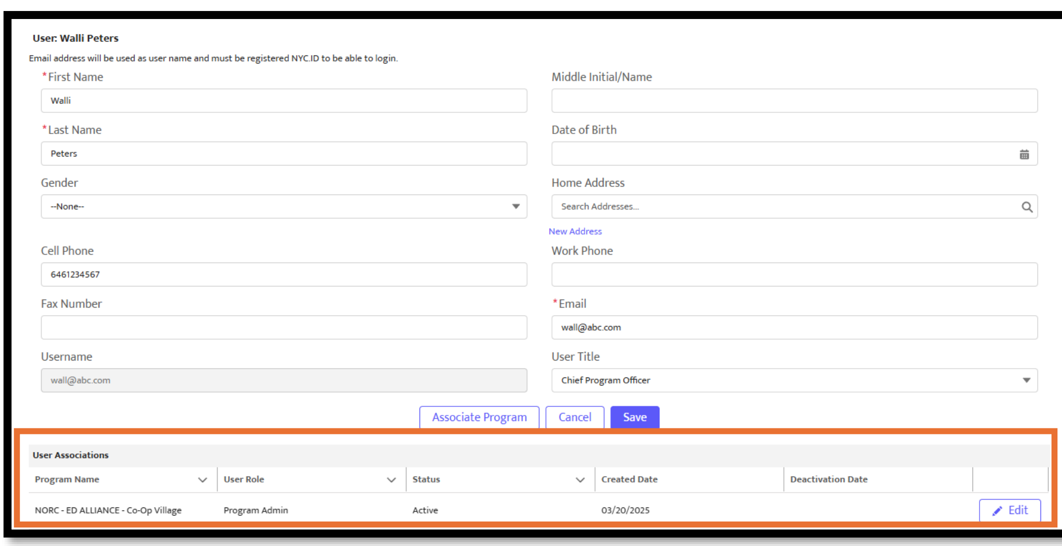
> ***NOTE**: The Email Address must be the same one associated with their NYC.ID.*



There are four User Roles:

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

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



Editing a User

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

Editing Basic Information

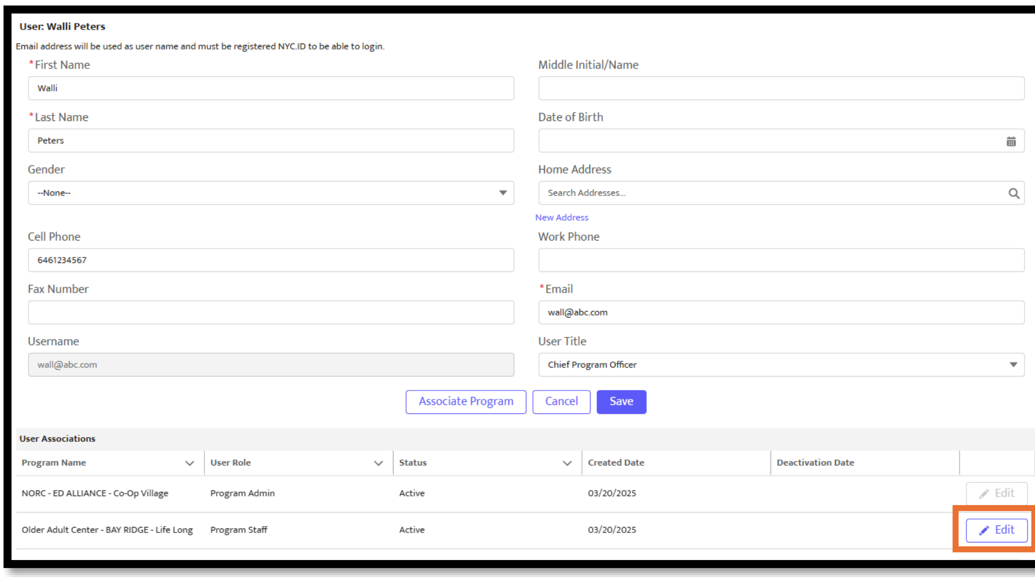
Step 1: From the Top Menu, click on Admin Tools.

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

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

Editing User Roles with Program Associations

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

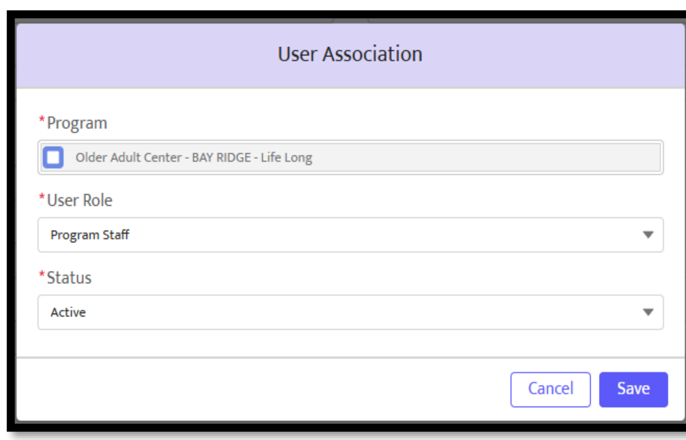


Step 1: From the Top Menu, click on Admin Tools.

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

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

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



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

Inactivating a User from a Program Association

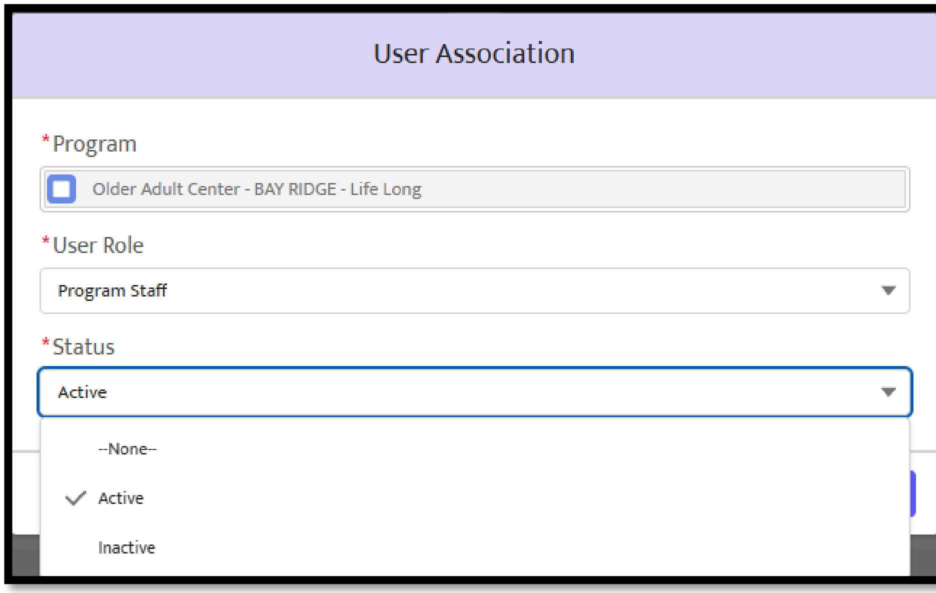
While users are never deleted from the system, they are inactivated from a program. In this way, they can be reactivated with another program later.

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

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

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

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



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