MAY 9, 2025

VIVÉ REFERENCE GUIDE

HOME DELIVERED MEALS

Department for the Aging

Welcome to the Detailed VIVÉ Reference Guide on Home Delivered Meals

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 Home Delivered Meals 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

VIVÉ Home Delivered Meals 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 instructions on using the **Home Delivered Meals (HDM)** module in VIVÉ.

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:

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

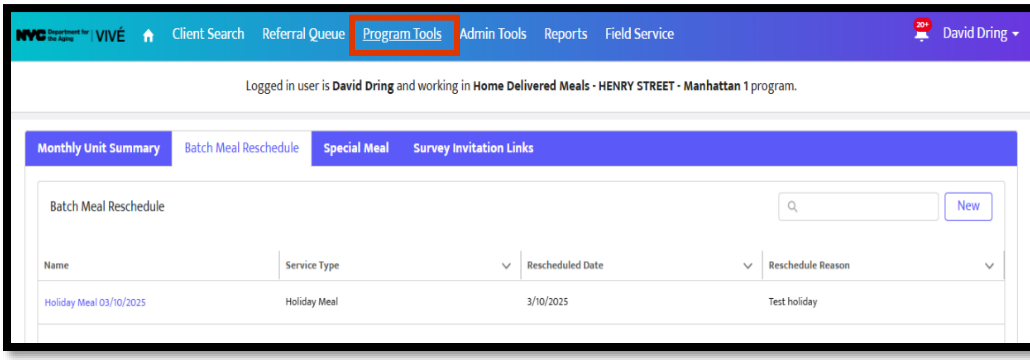
Overview

The Home Delivered Meals (HDM) program is unique in that it operates through the VIVÉ portal (desktop web browser based) and a mobile device, such as a tablet. This guide provides instructions on how to be successful with both applications.

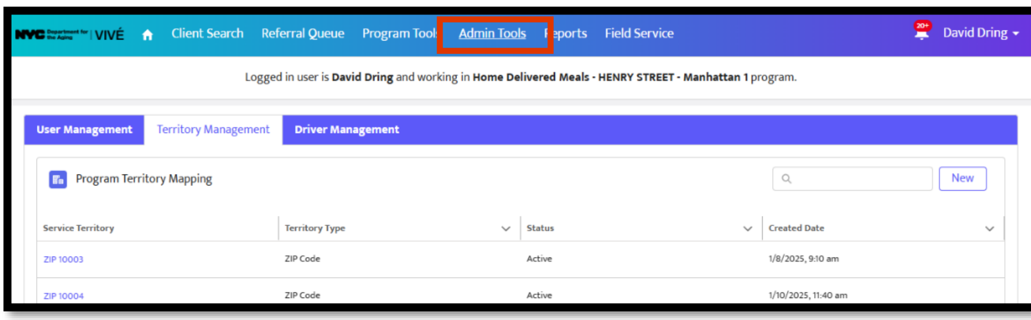
Home Delivered Meals Navigation

There are four key sections of VIVÉ for HDM programs: Program Tools, Admin Tools, Field Service, and the HDM Driver's App. The other areas of the VIVÉ service are common and have their own guides on the Knowledge Base. Below is an overview of the three key HDM navigational elements.

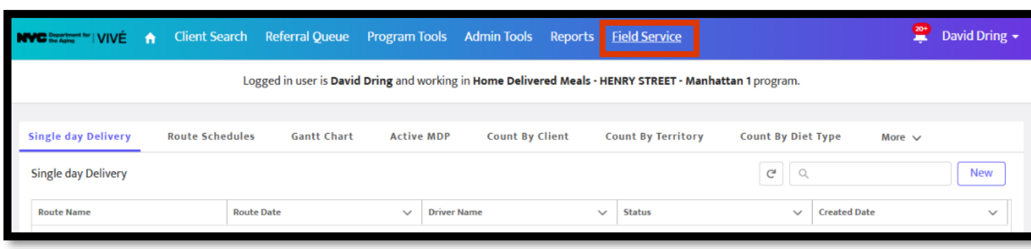
Program Tools: Monthly Unit Summary, Batch Meal Reschedule, Special Meals and Survey Invitation Links.



Admin Tools: User Management, Territory Management, and Driver Management.



Field Service: Single Day Delivery, Route Schedules, Gantt Chart, Active MDP, County Client, Count by Territory, Count by Diet Type, Service Territory and Driver List.



The Driver's App's navigation is described below.

Territory Management

Routes can be created through an automatic process or manually. There is a one-time set-up for the automatic process to create the territories within your catchment area. The process requires entering all the Zip Codes that are within your area. VIVÉ uses geo-coding to automatically assign clients to these territories, optimizing route management.

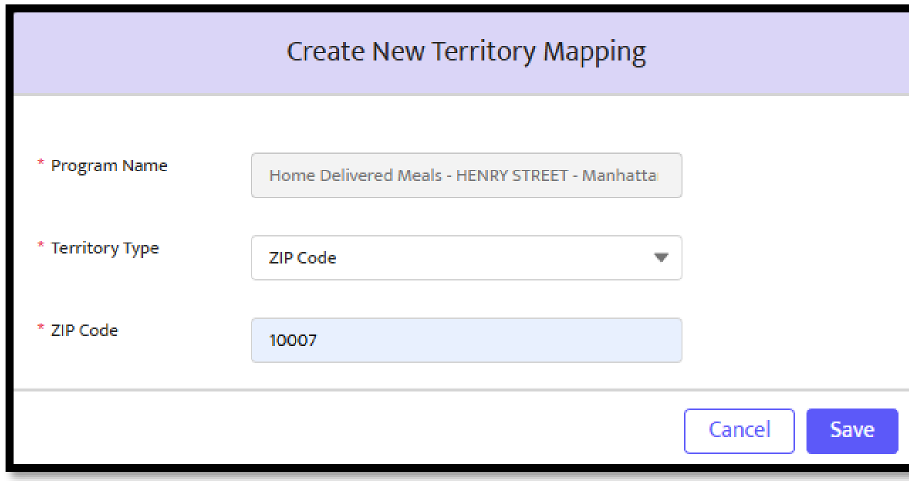
The other way to create and manage routes is manually. You do not need to create territories to manage your routes manually.

Adding a New Territory

Step 1: From the Top Menu, click Admin Tools. Click the Territory Management tab.

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

Step 3: From the **Create New Territory Mapping** enter in your Zip Codes.

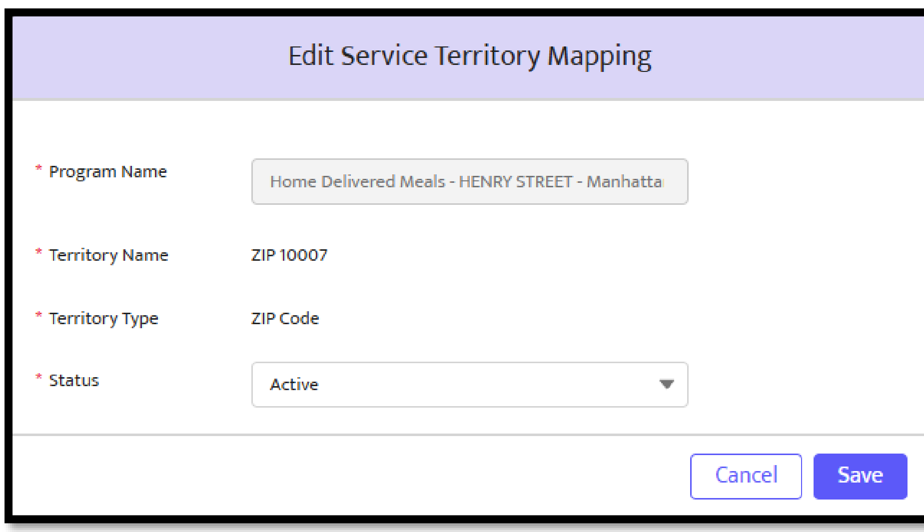


Editing a Territory

Step 1: From the Top Menu, click Admin Tools. Click the Territory Management tab.

Step 2: From the **Territory Management** list view, click on a Service Territory link.

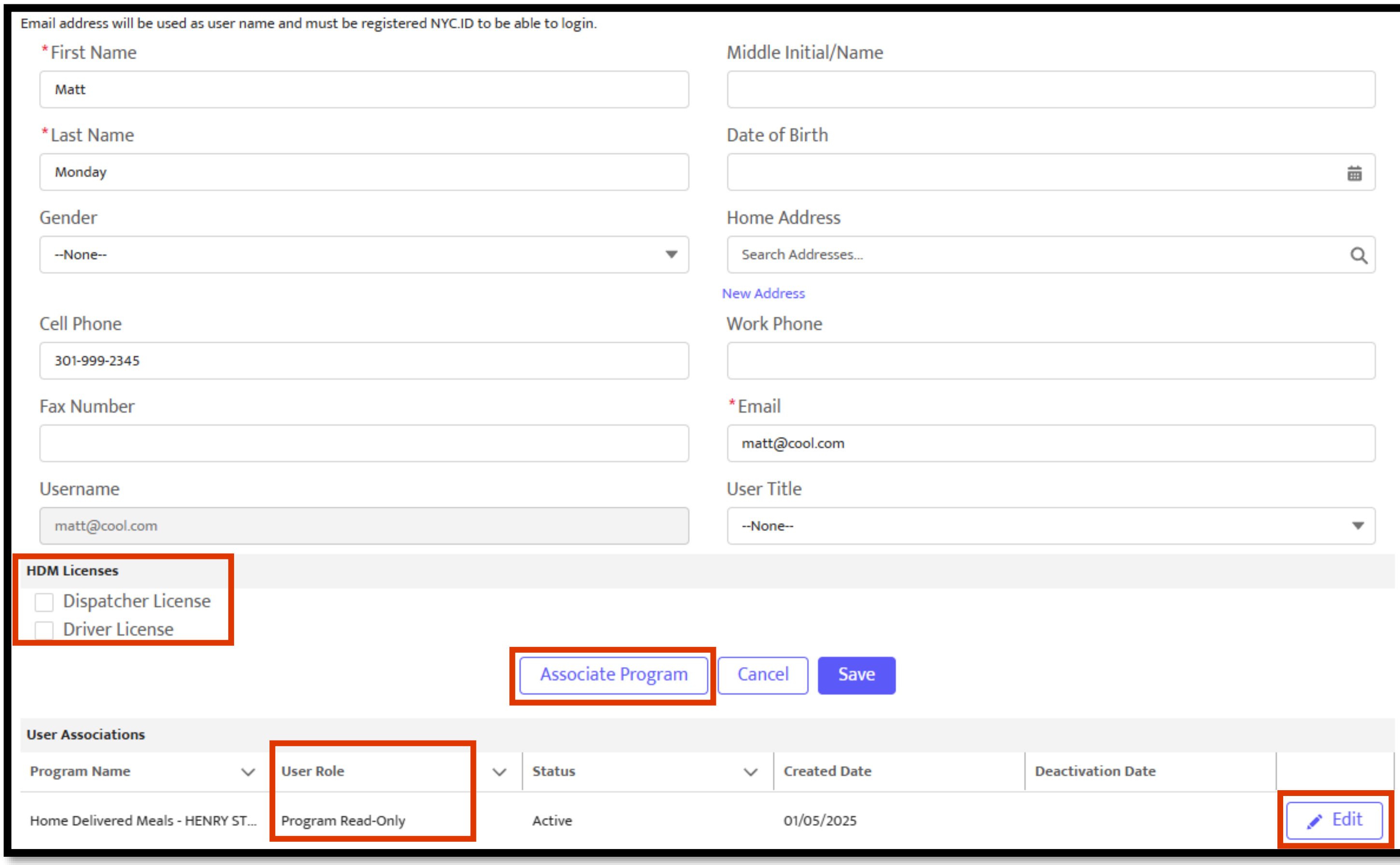
Step 3: From the **Edit Service Territory Mapping**, use the dropdown menu to change the status.



Driver Management

There are two tasks to manage drivers: managing them as a user and assigning them as a driver.

Managing Driver Users



Step 1: From the **Top Menu**, click **Admin Tools**. Then click the **User Management** tab.

Step 2: Either click on an existing Username link or select **New**.

Step 3: On the User Details page, toward the bottom is the HDM License section. Check whether the user is a Dispatcher, Driver, or both.

Step 4: Select the **Associate Program** button to link your program with this user. Be sure to select the Program Read-Only User Role for your driver.

Select **Edit** if you need to change the association, user role or the status of the user.

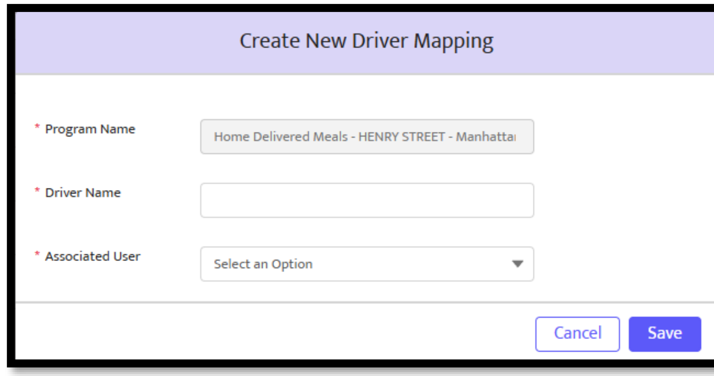
Assigning A Driver

Step 1: From the Top Menu, click Admin Tools. Then click the Driver Management tab.

Step 2: Select **New**.

Step 3: From the **Create New Driver Mapping** pop-up, enter a Driver Name (doesn't have to be a name, can be "Back-Up Driver").

Step 4: Use the type-ahead technology to select a user to associate with the Driver Name. Select **Save**.

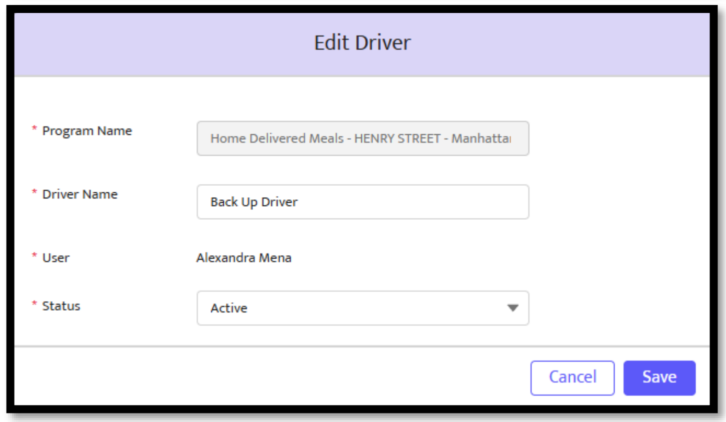


Editing a Driver

Step 1: From the Top Menu, click Admin Tools, then the Driver Management tab.

Step 2: From the **Driver Management** list view, click on a Driver's Name link.

Step 3: From the **Edit Driver** pop-up, you can change the Driver Name or Status of the driver.

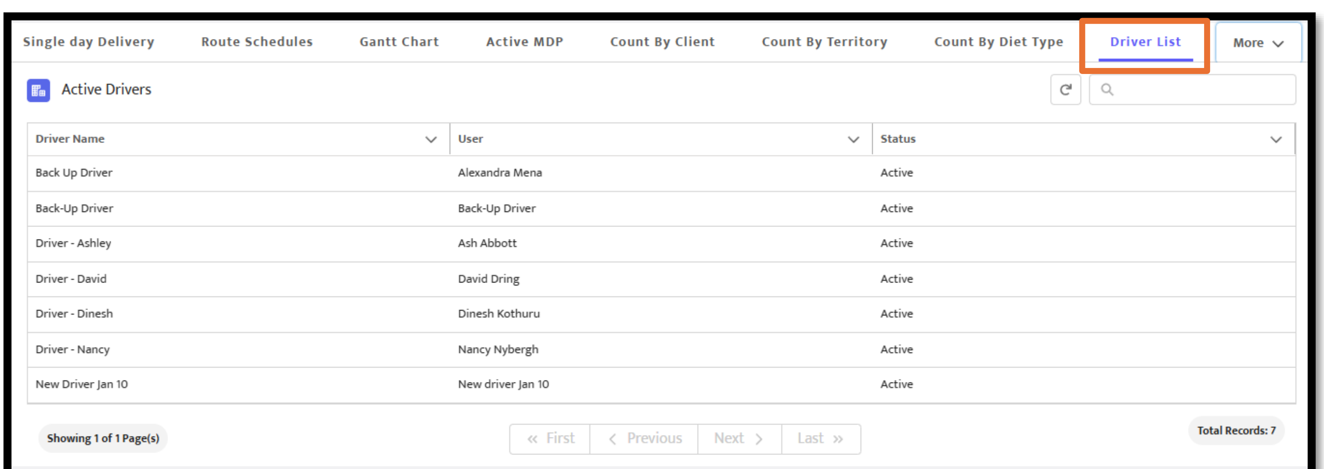


Driver List

You can also see a list of only active drivers from the **Field Service** tab.

Step 1: From the **Top Menu**, click **Field Service**, click **Driver List** tab. Depending upon your window's width, you may have to use the More link and pick Driver List from the dropdown menu.

Step 2: View the list of only active drivers.



Route Management

Below are the tools for managing routes:

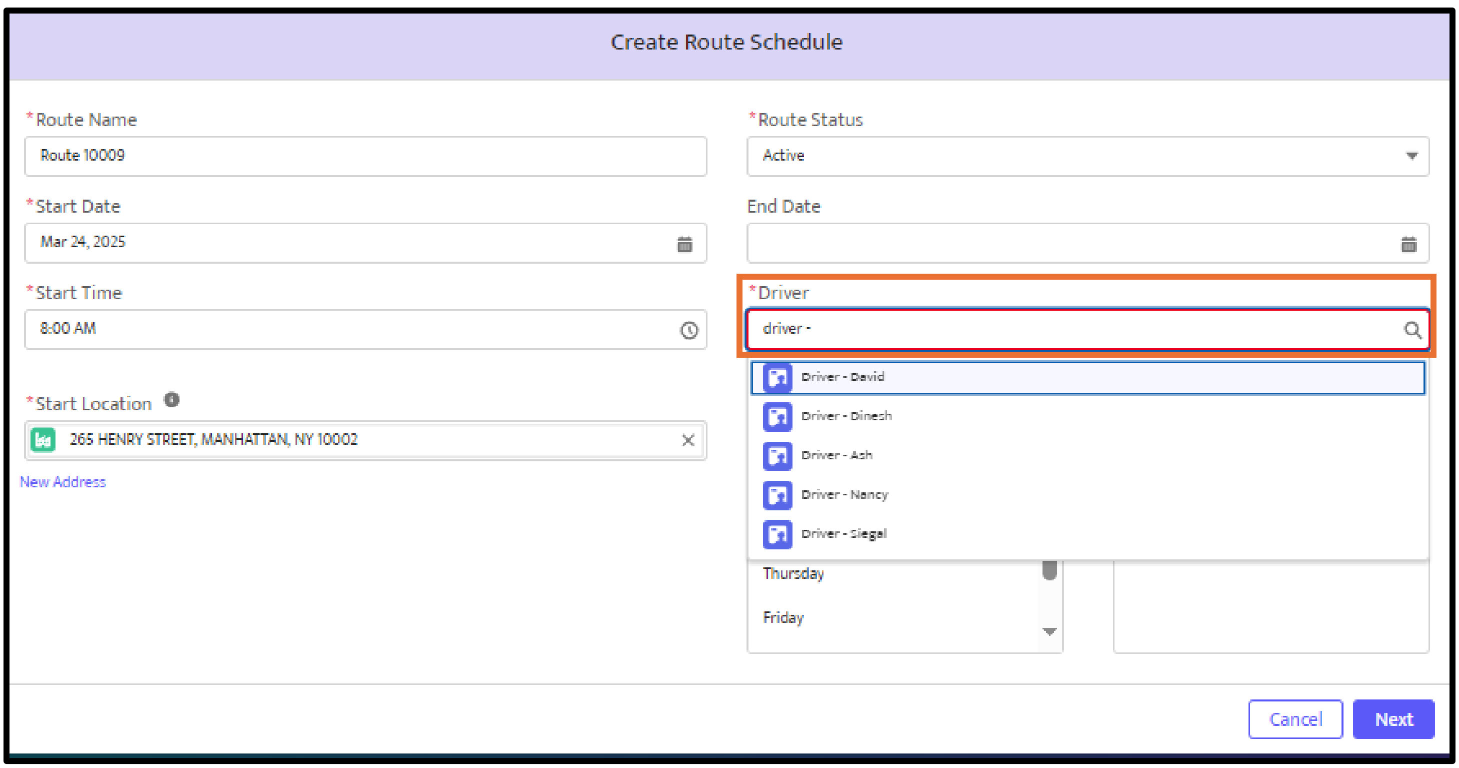
- **Route Schedules** where regular routes are created and managed.
- **Single Day Deliveries** where routes for the day are generated from Route Schedules.
- **Batch Meal Reschedule** reschedules all routes for a holiday or emergency.
- **Special Meal Schedule** supports the delivery of box meals.

Create a New Route Schedule

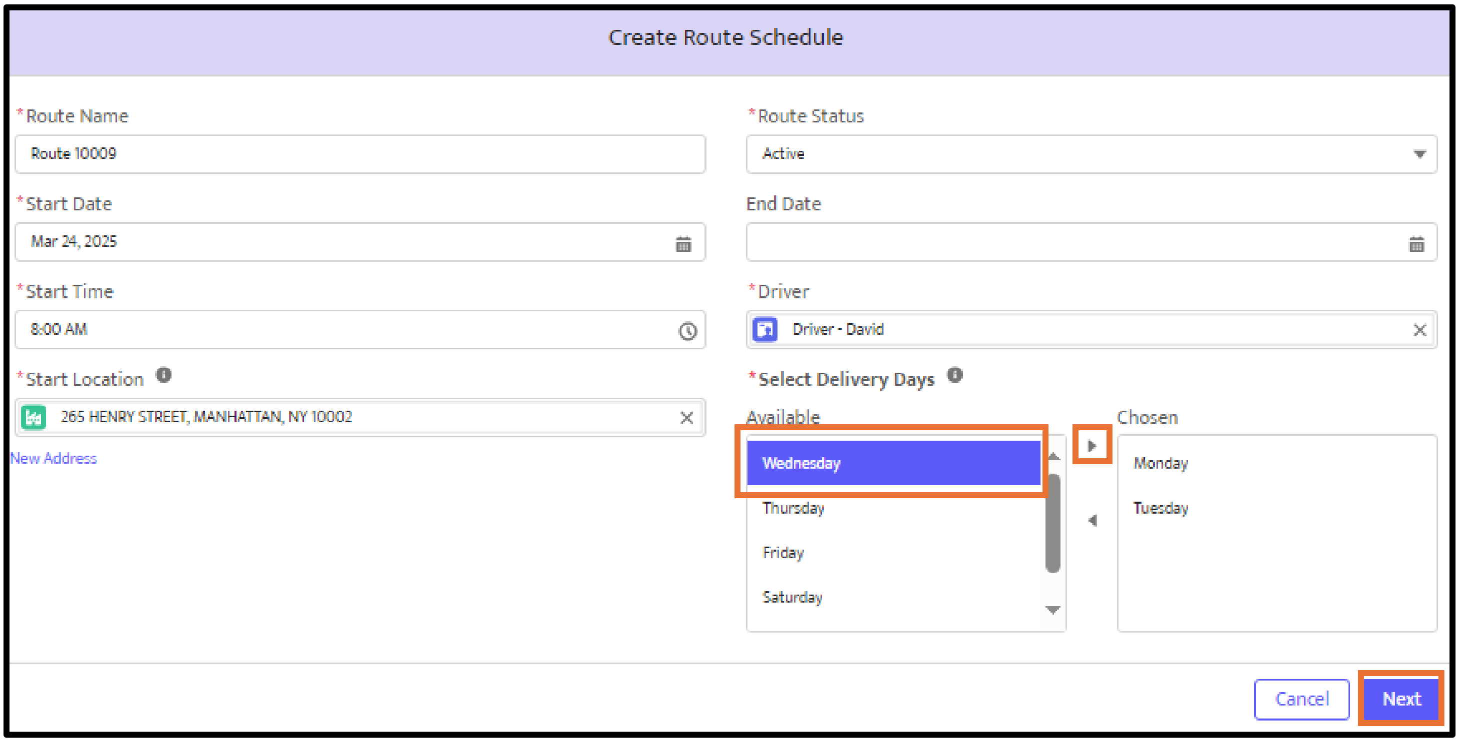
Step 1: From the Top Menu, click Field Service, click Route Schedules.

Step 2: From the **Route Schedules** list view, select **New**.

Step 3: From the **Create Route Schedule** pop-up, enter the required fields. When entering Driver, use the type-ahead technology to find the Driver Names, not usernames.



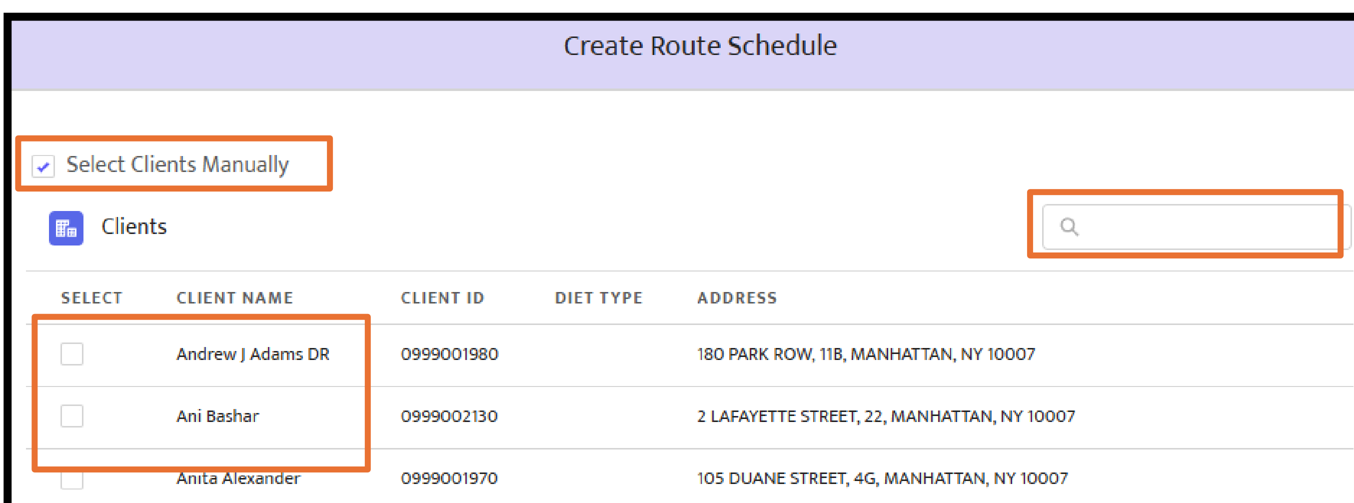
Step 4: Select the Schedule for the specific route by selecting the applicable days and moving the days to the right-most box utilizing the arrow. Select **Next**.



Step 5: After selecting **Next**, you have a choice between creating a manual route or an optimized one.

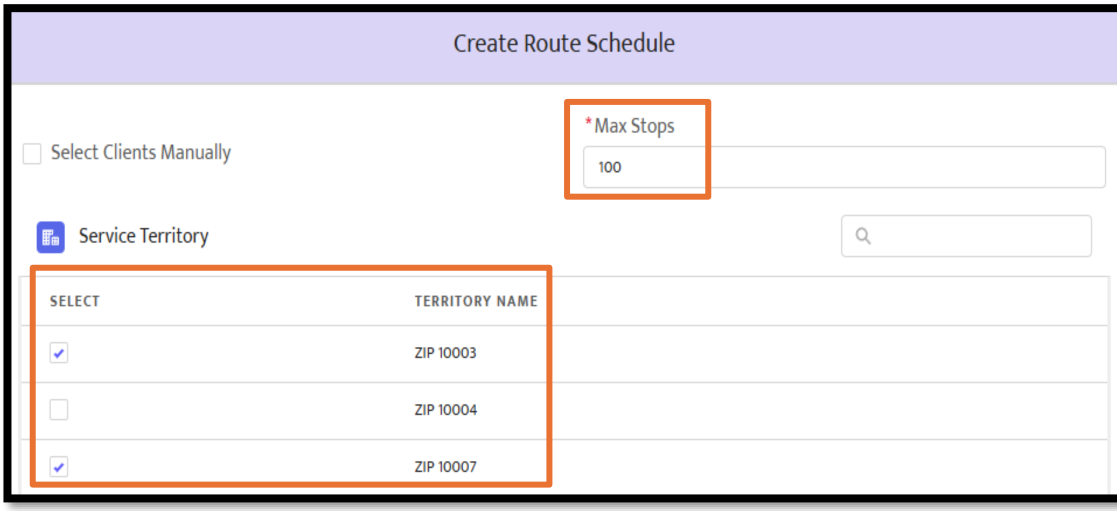
Creating a Manual Route

Once the "Select Clients Manually" box is checked, a list of active clients will be displayed. Use the check boxes to the left of their name to select the clients to include. There is a search box to find specific clients. Select **Save**.



Creating an Optimized Route

An optimized route automatically assigns a client to a route based upon the routes territory/Zip Codes. On the **Create Route Schedule** pop-up indicate the maximum number of deliveries that should be assigned and check the territories that should be included. Select **Save**.



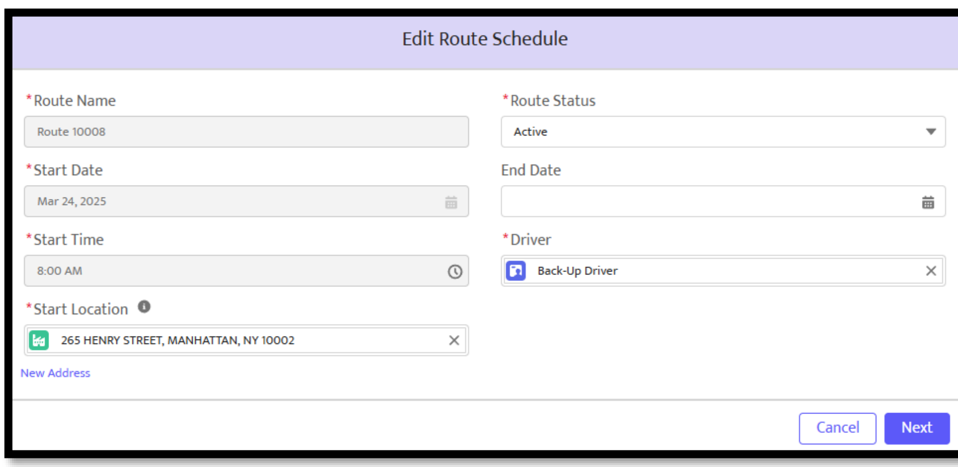
Edit a Route Schedule

Step 1: From the Top Menu, click Field Service, click Route Schedules.

Step 2: From **Route Schedules** list view, click a Schedule Name link.

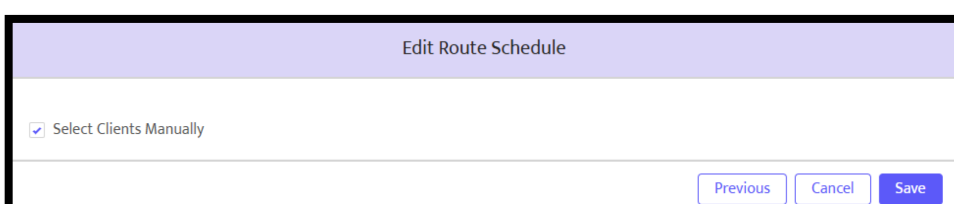
Step 3: On the **Edit Route Schedule** pop-up you can edit Start Location, Route Status, End Date, and Driver.

Step 4: Select **Next**.



Editing a Manual Route

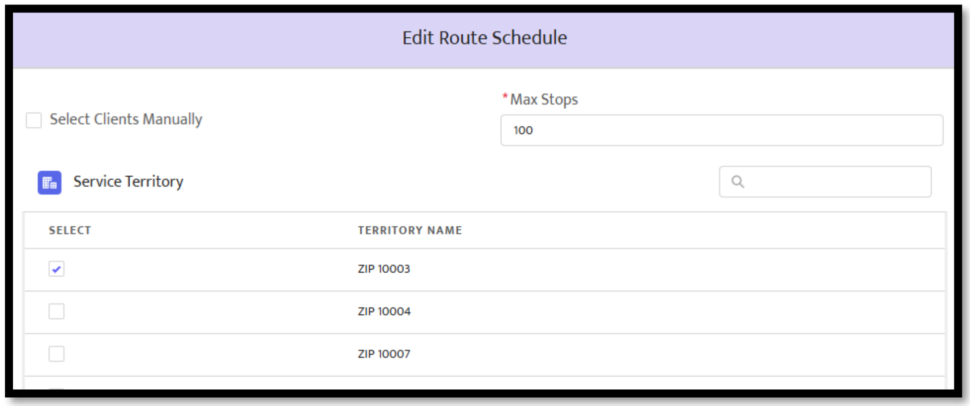
After selecting **Next**, the **Edit Route Schedule** pop-up will have the Select Clients Manually box checked.



Uncheck the box and the pop-up displays an uncheck Select Clients Manual box and a list of the territories to select. Check the Select Clients Manually box for the list of clients to appear. Check all clients that you want on this route. Select **Save**.

Editing an Optimized Route

After selecting **Next**, the **Edit Route Schedule** pop-up will display the list of Service Territories. Click or unclick the territories you want on this route. Select **Save**.



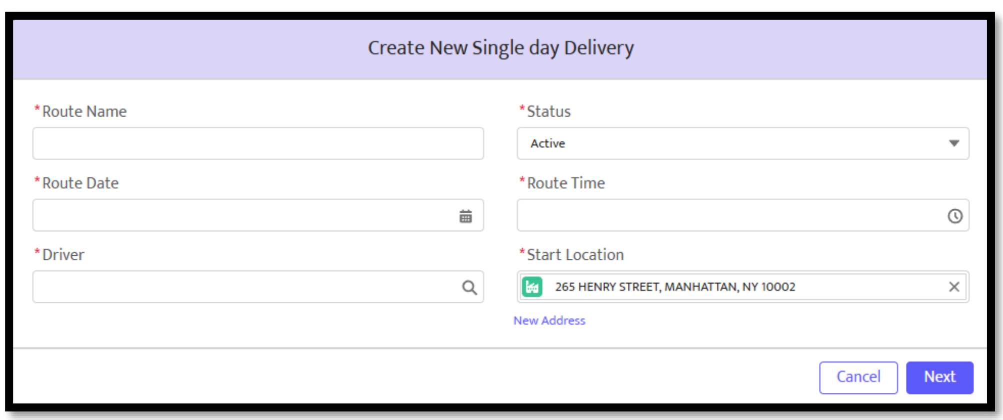
Single Day Deliveries

Your daily routes are listed here. Each day at 3 p.m., VIVÉ creates the routes for the next day. Your most recent appear at the top. You can create a future single day delivery, manage a current route and view historical details.

Creating a Single Day Delivery

Step 1: From the Top Menu, click Field Service, click Single Day Deliveries. Select New.

Step 2: Enter required fields. Select **Next**.



Step 3: To add clients to this route manually (check the box beside Select Clients Manually and check the clients to be included) or automatically (select the territories to be included). Select **Save**.

Editing a Single Day Delivery: Details

There are three sub-menus of the Single Day Delivery section: Details, Related and Service Appointments.

Step 1: From the Top Menu, click Field Service, click Single Day Deliveries.

Step 2: Click on the Route Name link. From the Details menu you can edit its details, specifically its name, status, driver and start address.

Within the **Details** sub-menu, use the pencil icons to edit.

Select **Save**.

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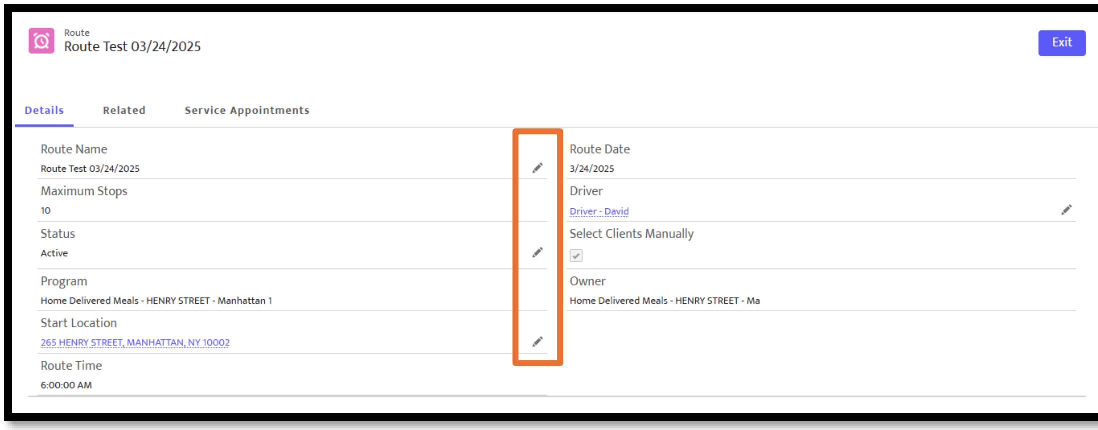


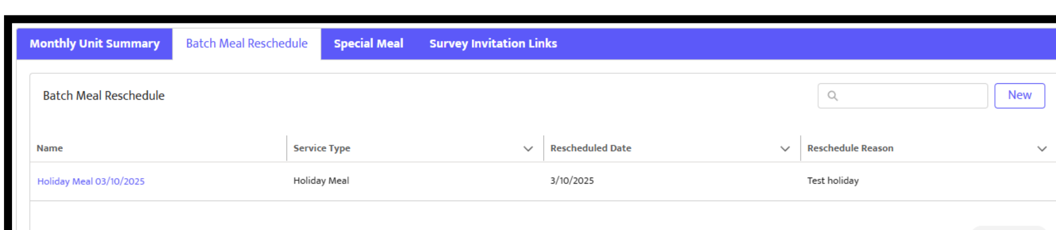
Within the **Related** sub-menu, there are two lists: Route Territory and Work Orders. Work Orders are used to build the Service Appointments (deliveries) for your drivers.

The **Service Appointments** sub-menu is critical. From here you can manually enter the status of deliveries. You can update the status of all deliveries assigned to this route or individually. See below for more guidance.

Batch Meal Reschedule

This tool allows you to reschedule all clients to a new date.

Step 1: From the Top Menu, click Program Tools, click the Batch Meal Reschedule tab.



Step 2: From the Batch Meal Reschedule list view, you can either select an existing reschedule or create a new one.

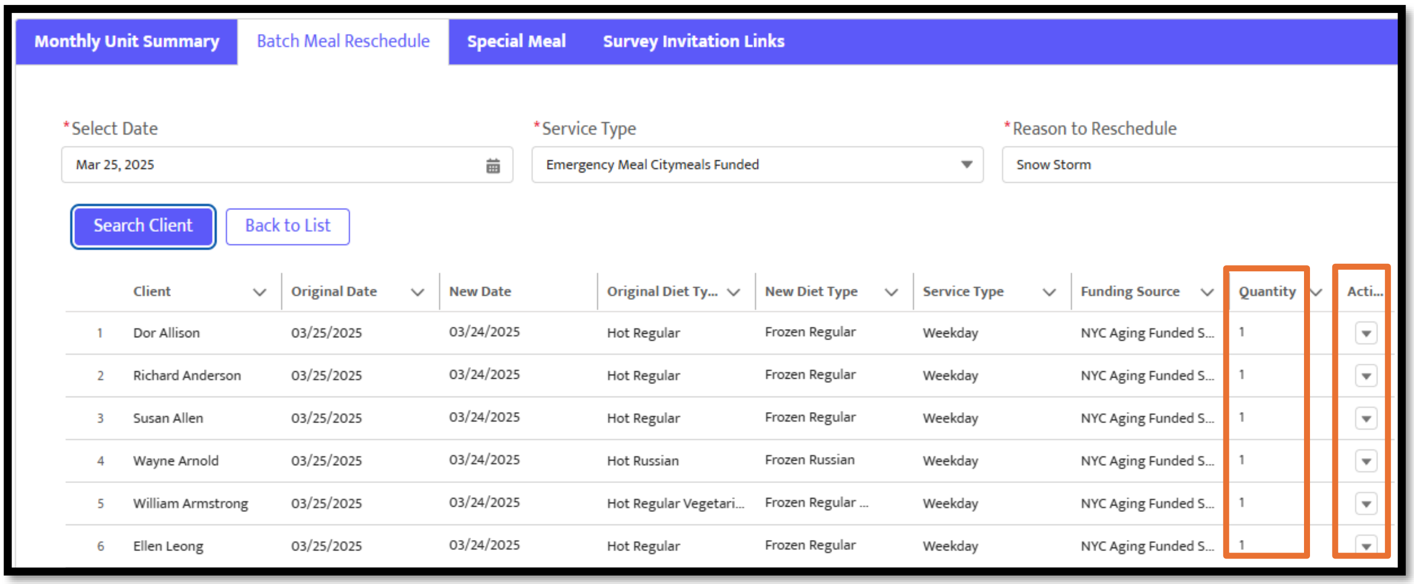
Create a New Batch Meal Reschedule

Step 1: From the Top Menu, click Program Tools, click the Batch Meal Reschedule tab.

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

Step 3: Enter the Date, Service Type and Reason to Reschedule.

Step 4: Select the **Search Client** button. All the clients displayed are automatically associated with this batch. To remove or change the quantity of their delivery, make individual edits within the Quantity and Actions columns.



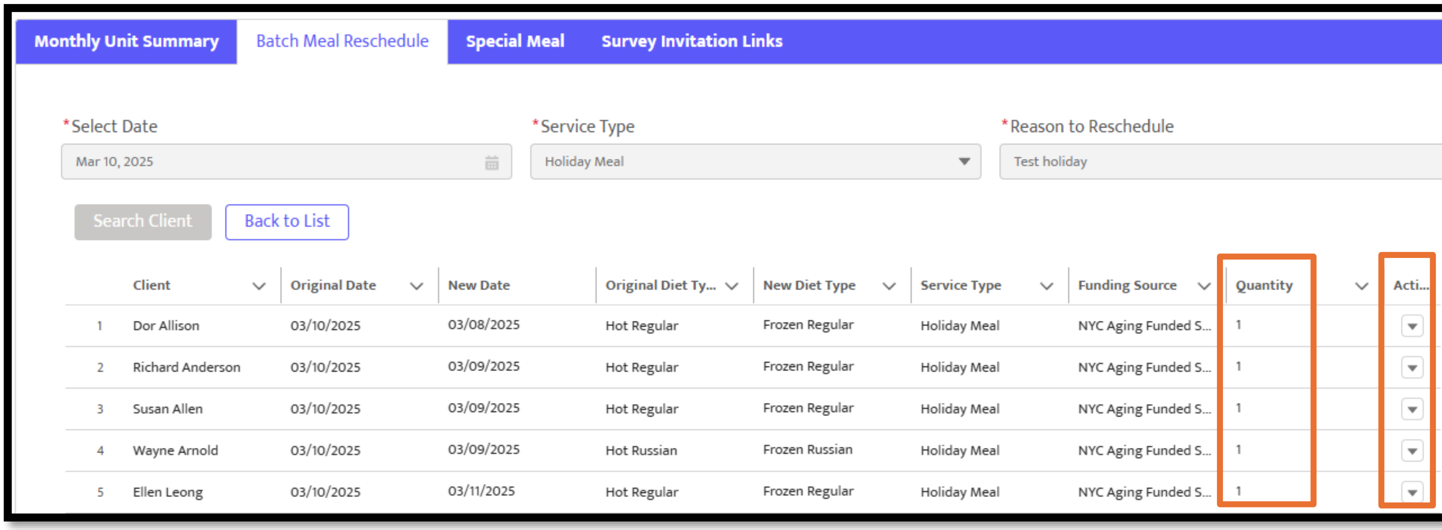
Edit an Existing Batch Meal Reschedule

Step 1: From the Top Menu, click Program Tools, click the Batch Meal Reschedule tab.

Step 2: Click on the desired **Batch Meal** name link.

Step 3: You can only edit the quantity of meals provided to individual clients by changing the 1 to another number within the Quantity column. All other fields are grey.

Step 4: Delete an individual client from this batch by selecting the downward facing triangle and selecting delete. Select **Save**.



Special Meal

This function schedules and tracks the delivery of a special meal, such as an emergency box meal.

Step 1: From the Top Menu, click Program Tools, click the Special Meal tab.

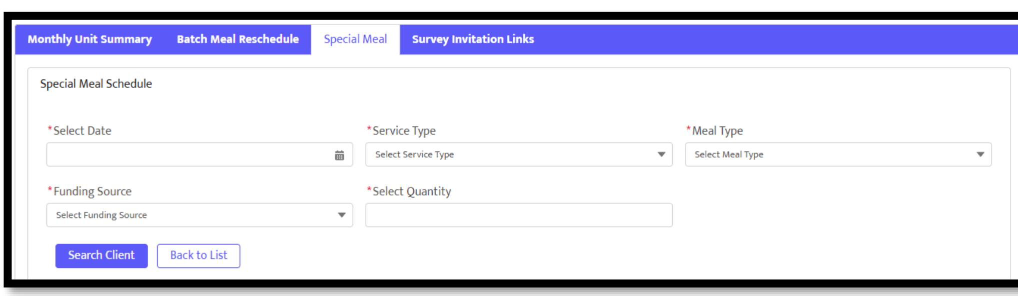
Step 2: From the Batch Meal Reschedule list view, you can either select an existing special meal or create a new one.

Create a New Special Meal

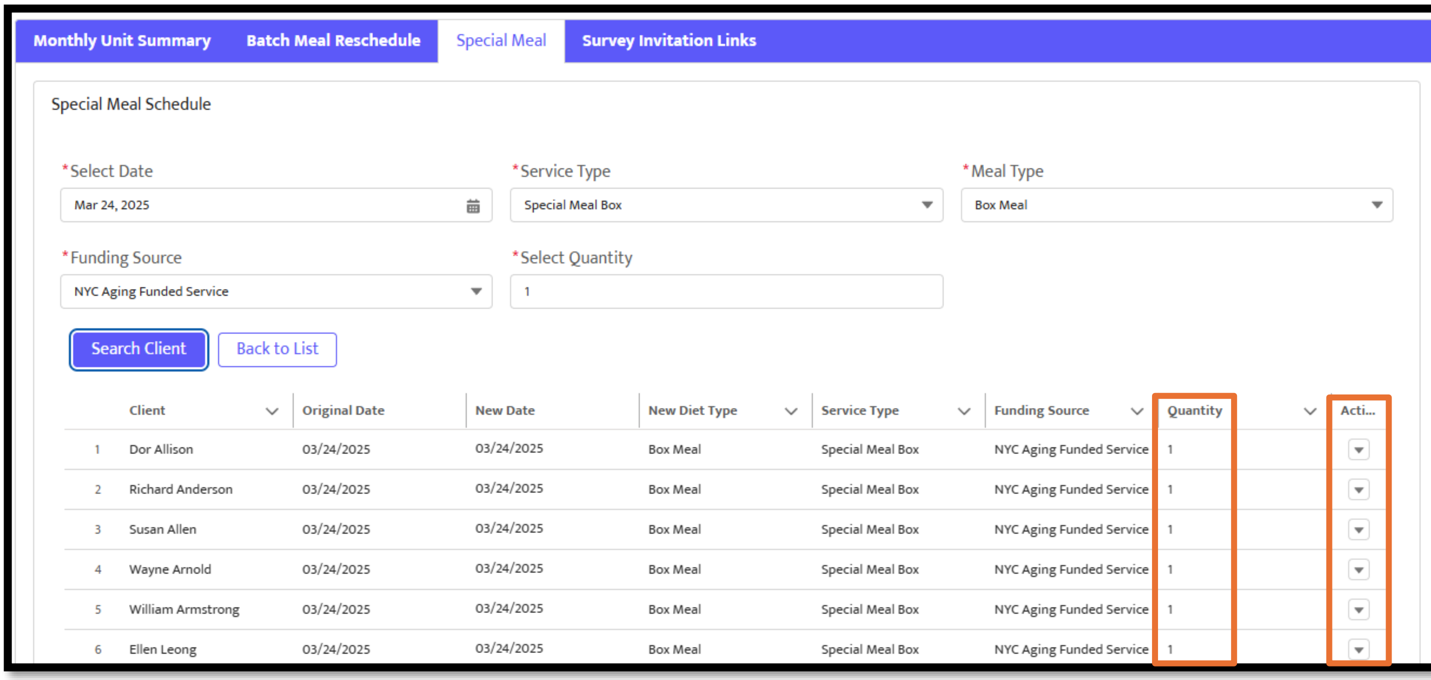
Step 1: From the Top Menu, click Program Tools, click the Special Meal tab.

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

Step 3: Enter the Date, Service Type, Meal Type, Funding Source, and Quantity.



Step 4: Select the **Search Client** button. A list of all clients will display. All these clients are automatically associated with this special meal. Select **Save.**



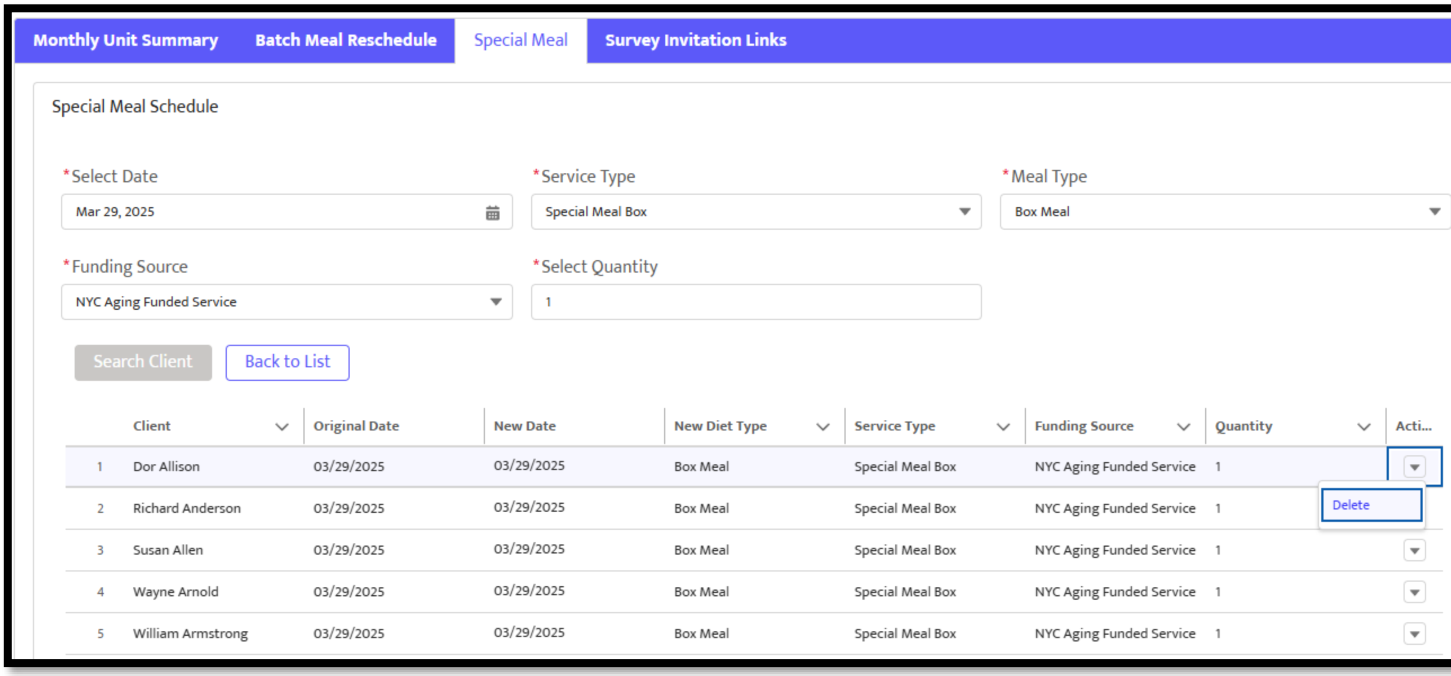
Edit a Special Meal

Step 1: From the Top Menu, click Program Tools, click the Special Meal tab.

Step 2: From the **Special Meal** tab, click the name link.

Step 3: The required fields at the top of the page are all editable.

Step 4: If you would like to remove anyone from this special meal delivery, click on the **Actions** triangle. Then click **Delete**.



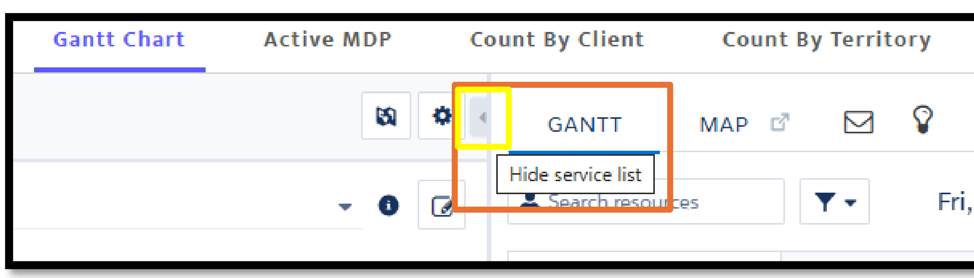
The Gantt Chart a Tool for Dispatchers

The Gantt Chart is a helpful service in coordinating meal delivery in real time.

Gantt Chart – An Overview

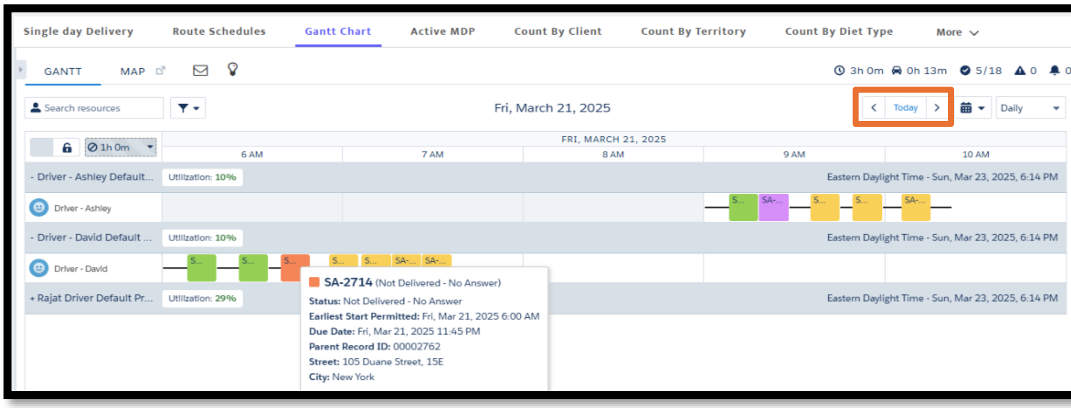
The Gantt Chart, which is located under "Field Service". This chart (which can take a minute to load), provides a list of the drivers and their deliveries/service appointments. The order of the deliveries is in an optimized route order. Using geo-coding, VIVÉ suggests the best delivery routes for each driver.

When the page first loads it may be in two parts. The Service details on the left and the Gantt chart on the right. It's best to focus on the Gantt chart. Hide the Service List by clicking on the left facing triangle at the top of the page.



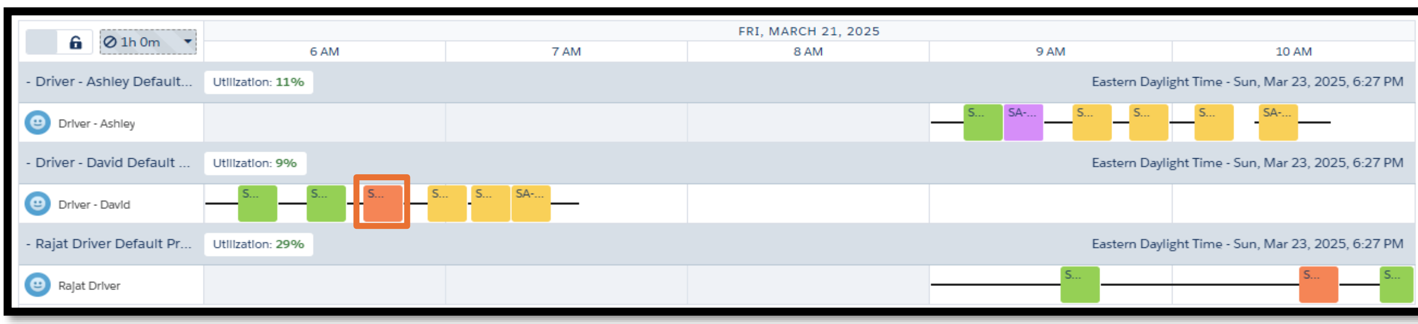
The Gantt Chart lists each driver for the day selected. Today is currently selected and highlighted. Each driver has each of their deliveries/service appointments as boxes in the order of their deliveries. For our purposes, Service Appointments and deliveries mean the same. **In real time, you will see when deliveries are made (green), are in progress (purple), are scheduled (yellow) and when they are unable to be delivered (burnt orange).**

When you hover your mouse over a particular box, as illustrated for Driver - David's third delivery/box. You will see more details about that delivery, such as Status: Not Delivered – No Answer.



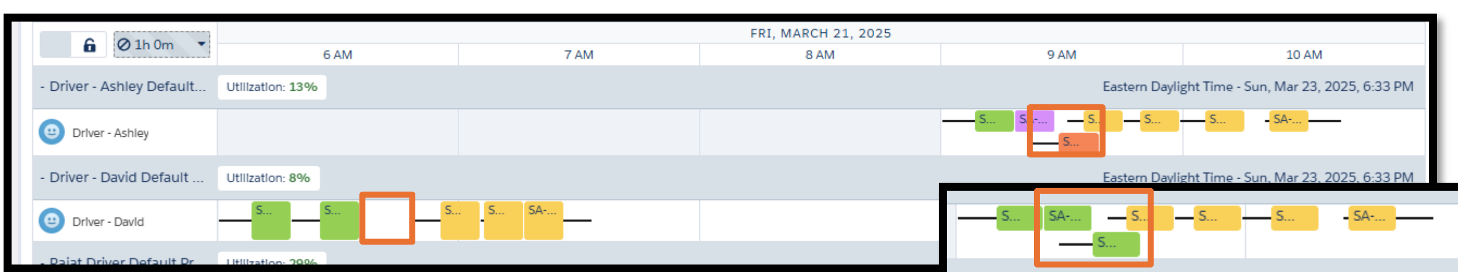
Using the Gantt Chart to Make a Last-Minute Rescheduling

Step 1: As an example, you can click on the Not Delivered Service Appointment/Delivery box #2714, which is burnt orange on Driver David's route.



Step 2: Drag that box to Driver – Ash's route. Then the burnt orange box creates a second row within the route.

Step 3: Once Ash marks Service Appointment #2714 is delivered, it will turn green like the others.



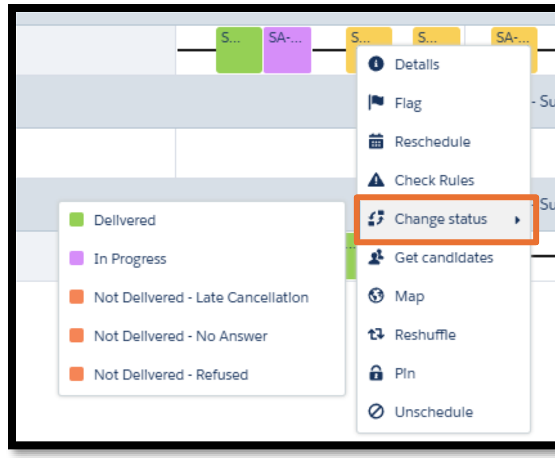
NOTE: *As Drivers mark their Service Appointment/Delivery in progress, you will be able to know which is their next delivery. This can be helpful when client's call.*

Using the Gantt Chart to Change Delivery Status

Step 1: Right-click on a Service Appointment (delivery/box), a dropdown menu appears. There are several options for more details about this delivery. From here you can manually change the status of a delivery.

Step 2: Click on **Change Status** and all the status options appear.

Step 3: Click on the appropriate status. This can be particularly helpful when needing to update a Not Delivered status.



Unit Tracking

As you know, a unit is a delivered meal. To streamline the service, once a meal is marked delivered it cannot change unless the unit is voided (more details below). Our recommendation for tracking deliveries and thereby units is the HDM App. It makes tracking deliveries more efficient and counts units in real-time. (More details on the HDM App below). There are two other ways to track units:

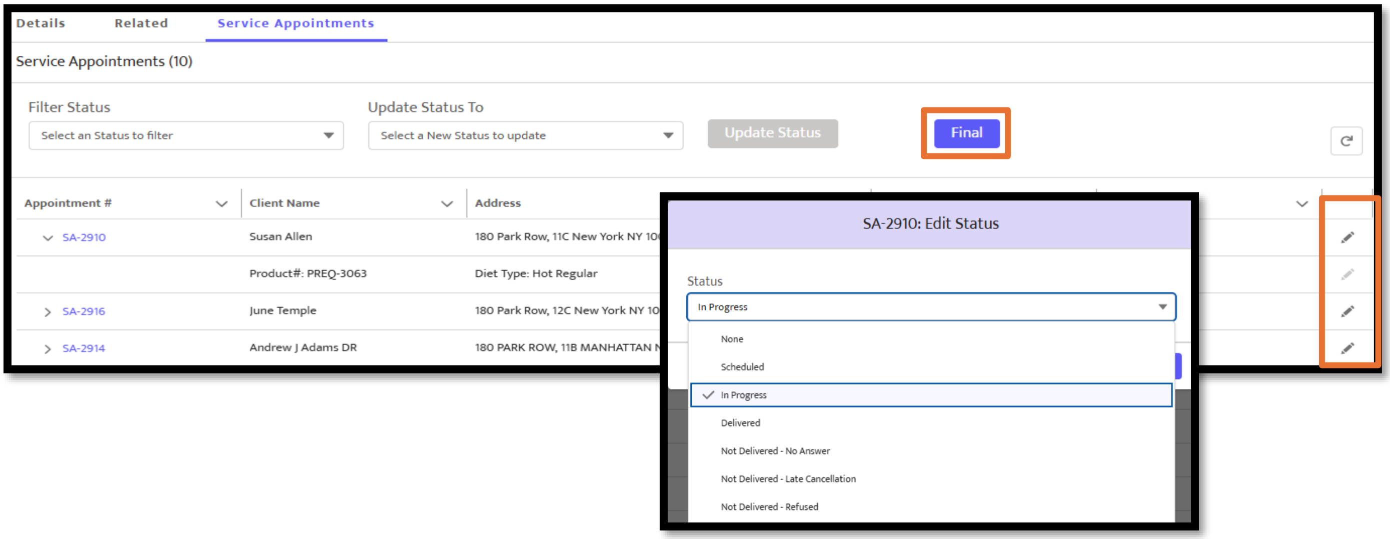
- from the Gantt chart as described above.
- from the Single Day Delivery tab within Field Service.

Individually Update Deliveries

Step 1: Use the pencils at the right end of each service appointment to change its status.

Step 2: From the **Edit Status** pop-up, pick the updated status. Select **Save**.

Step 3: Select the **Confirm, Mark, Lock, Set, Save Updates** button to save the changes. If the button isn't selected and you move away from the page, you will need to make your updates again.



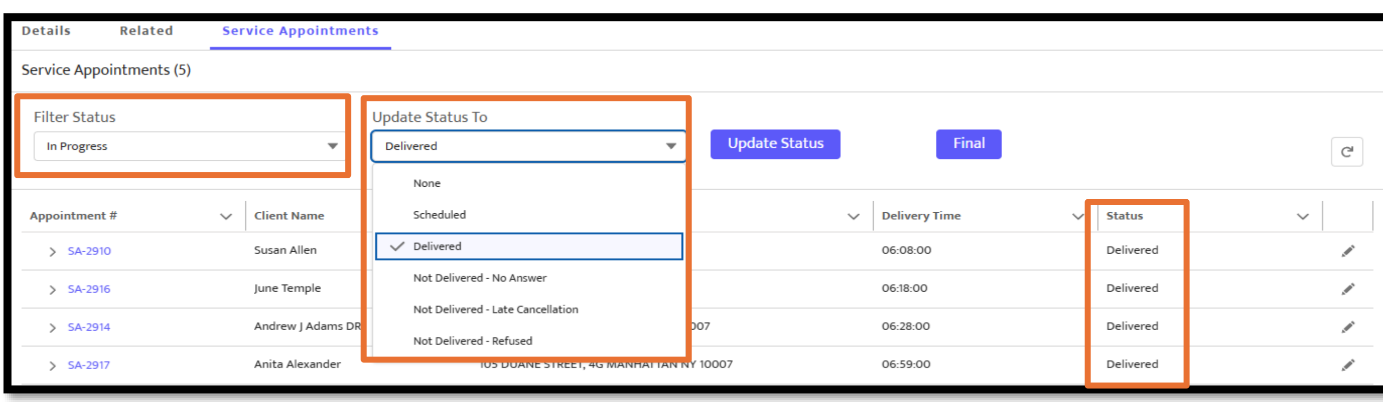
Update Multiple Deliveries

You can update multiple deliveries at one time. For example, to save time you can change the status all of the service appointments to Delivered and then individually change the status of a couple that were not delivered.

Step 1: Filter to view a sub-list. For example, filter by In Progress.

Step 2: From the Update Status dropdown, pick a new status: Delivered. Select the **Update Status** button. Note all appointments display with the Status Delivered.

Step 3: Use the pencil icon to change the status of any appointments. Select **Save Update**. If the button isn't selected and you move away from the page, you will need to make your updates again.

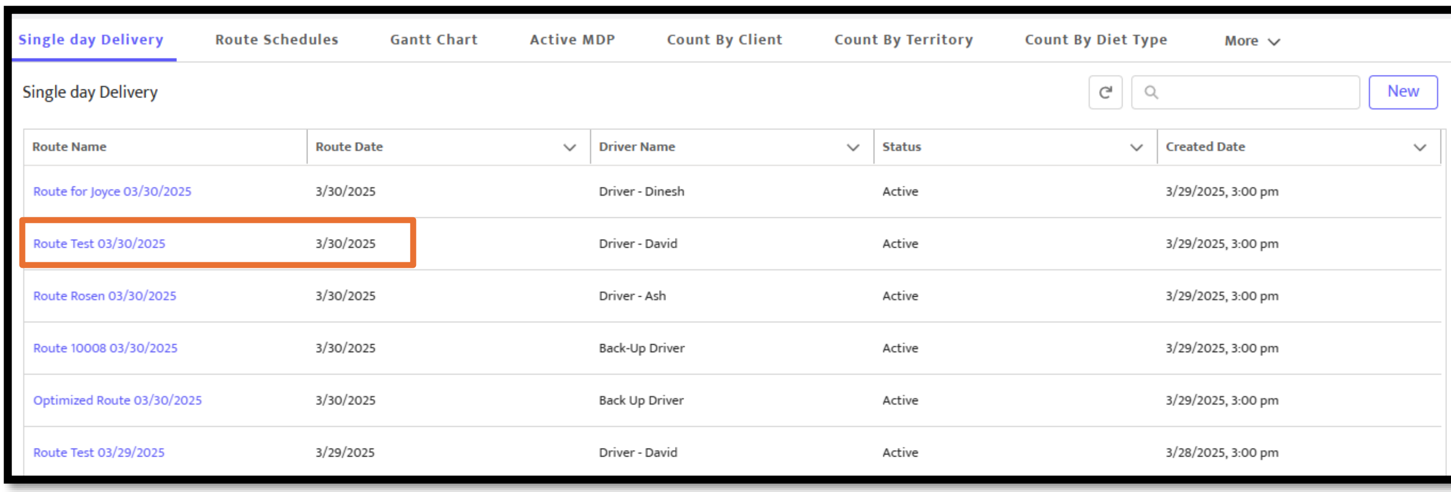


Manually Tracking Units from the Single Day Delivery Service Appointments

Every day at 3 p.m., the routes for the next day are created. These routes are managed within the **Field Service** section's **Single Day Deliveries** tab. This is a way to see the status of these deliveries in real-time as well as enabling tracking deliveries manually (without using the app).

Step 1: From the Top Menu, click Field Service, click the Single Day Delivery tab.

Step 2: Click the **Route Name** link of the desired delivery day.



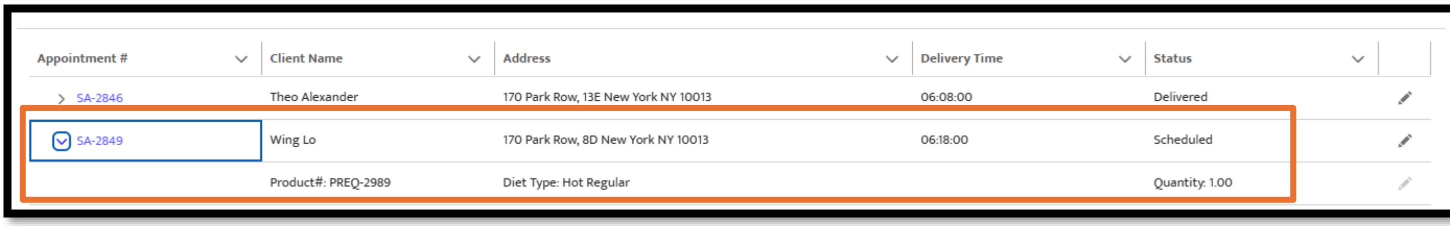
Step 3: Click the **Service Appointments** tab, then click on the pencil to change the delivery status.

Step 4: Pick the delivery status from the Edit Status pop-up menu.

View Individual Diet Types via Single Day Delivery Service Appointments

Step 1: From the **Single Day Delivery** tab, click on a Route Name link, click on the **Service Appointments** tab.

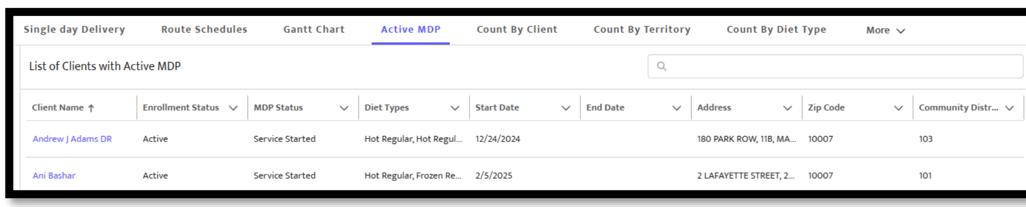
Step 2: Click on the right facing triangle before the Service Appointment number. It will reveal the Diet Type and Quantity number.



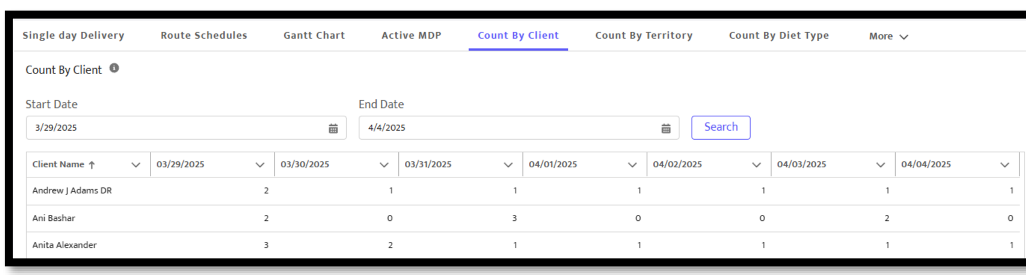
Administration

The Field Service section provides administrative tools. These tabs are described below:

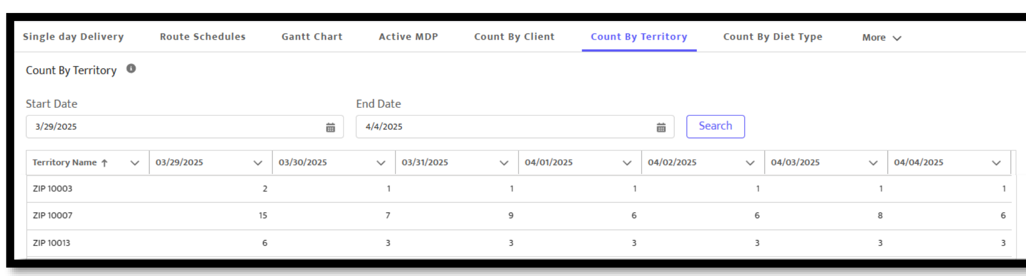
- **Active MDP**: This is a list of clients with active Meal Delivery Plans.



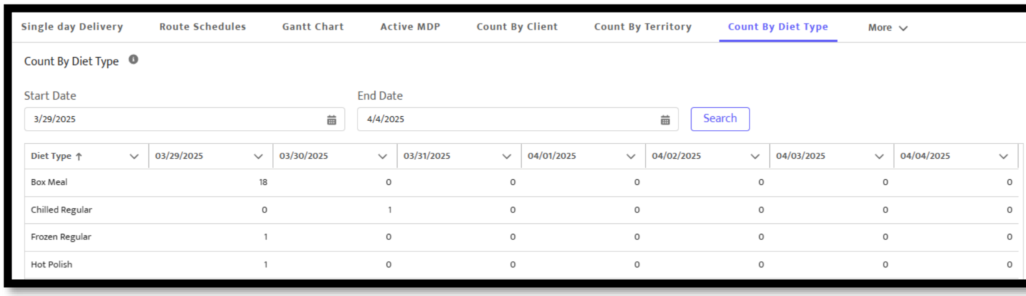
- **Count by Client**: Presents a list of clients and the daily count of meals they received. This view can be filtered by Start and End dates.



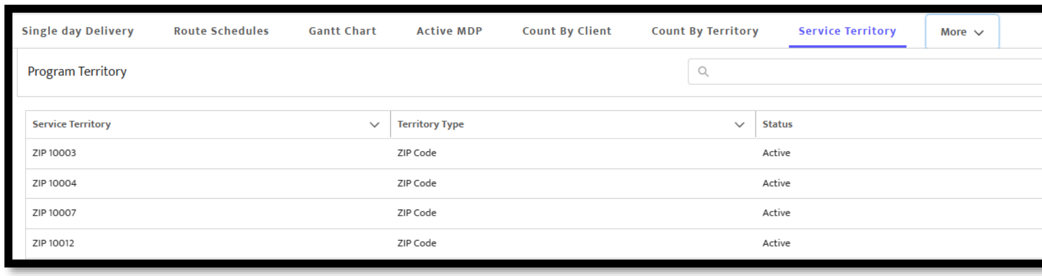
- **Count by Territory**: This view provides a daily count of meals delivered within each of your territories. This view can be filtered by Start and End dates.



- **Count by Diet Type**: This view provides a daily count of diet types delivered. This view can be filtered by Start and End dates.



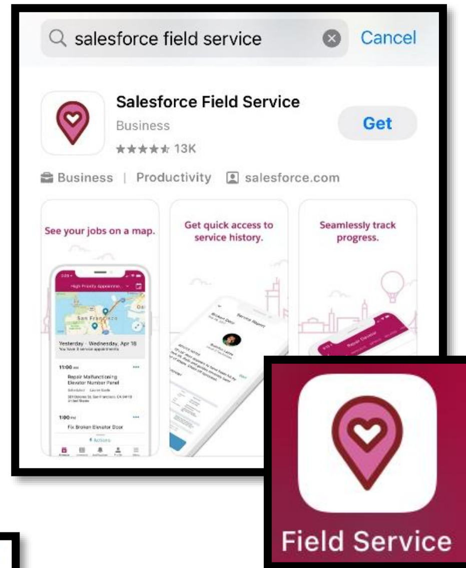
- **Service Territories**: This view presents a list of the active service territories.
- **Driver List**: This lists active drivers.



NOTE: *Often the More tab displays on the Field Service navigation. Click it to view the dropdown list of other sections.*

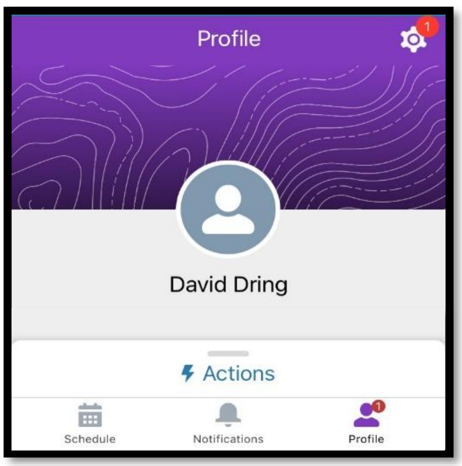
HDM Driver App

Salesforce, the platform upon which VIVÉ is built, provides an integrated mobile app service called Field Service. VIVÉ uses this service for the HDM app. Field Service is a free app available from either the App Store or Google Play. After setting up the app, you only need to touch the Field Service icon to login.



Setting up the HDM App

Step 1: Search for the Field Service app from either iOS App Store or from Android Google Play. Use the phrase: "Salesforce Field Service." Select the **Get** button to download the app.

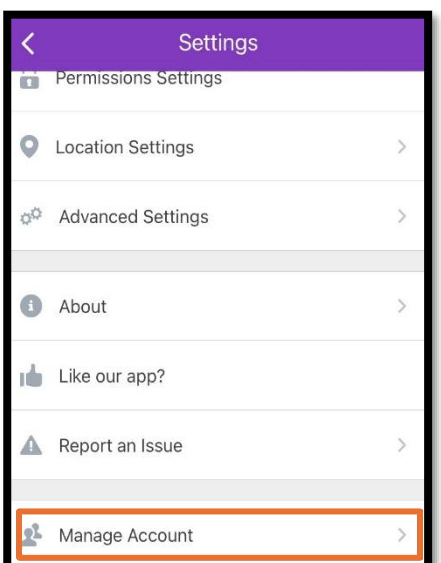


Step 2: From your mobile device, open the Field Service app.

Step 3: At the bottom the Home page of the Field Service app, touch the Profile Icon.

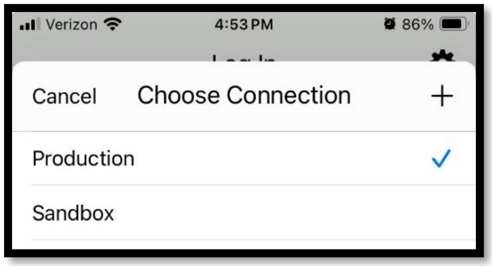
Step 4: From the Profile page, touch the gear in the upper right corner to go to Settings.

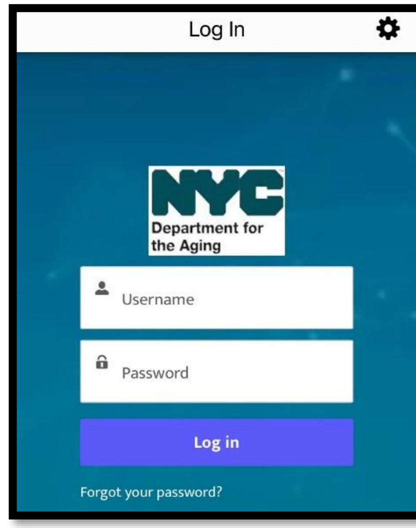
Step 5: From the Settings page, scroll down to select Manage Account.



Step 6: From the Manage Account page, select Choose Connection and select Production. The address to the Production Service should be prepopulated. If it does not, touch the Production option and then enter this address: nyc.gov/aging/VIVE.

Step 7: After entering in the connection, you'll be asked to Login to VIVÉ. You will only have to enter your credentials once.





Tracking Deliveries on the App

The VIVÉ HDM App provides real-time information on the progress of deliveries. Information entered in the App can be monitored by a dispatcher via the Gantt Chart Functionality or via Same Day Delivery Service Appointments.

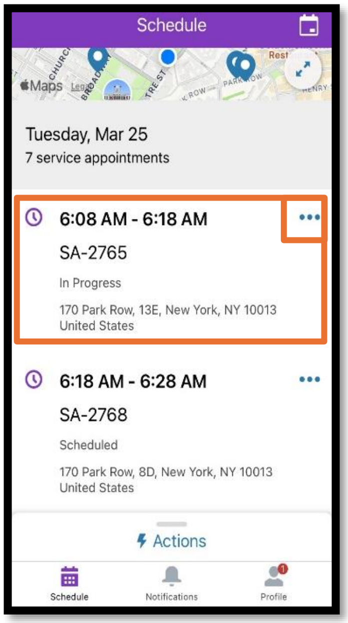
Additionally, the dispatcher can move clients from one route to another. For example, if one driver was not able to deliver a meal and another driver in the area who has an extra meal could make that delivery instead.

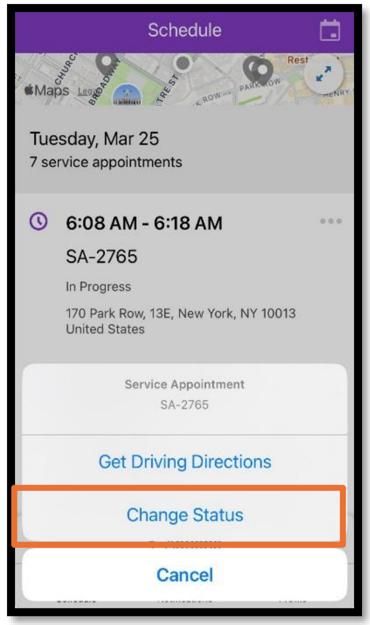
We recommend a three-step process to tracking your meals. The first is indicating that the driver is In Progress to deliver a meal. The second is to change the status to either Delivered or Not Delivered for a particular reason. Then the third indicates that the driver is In Progress to the next delivery.

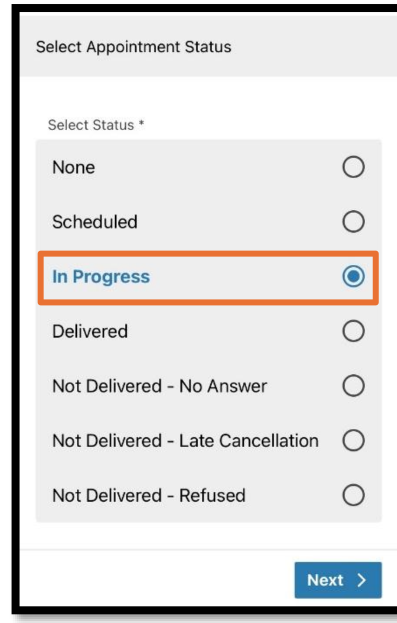
The Three Step Delivery Tracking Process

Step 1: Mark the delivery In Progress.

- From the Schedule Page (home page) touch the three dots.



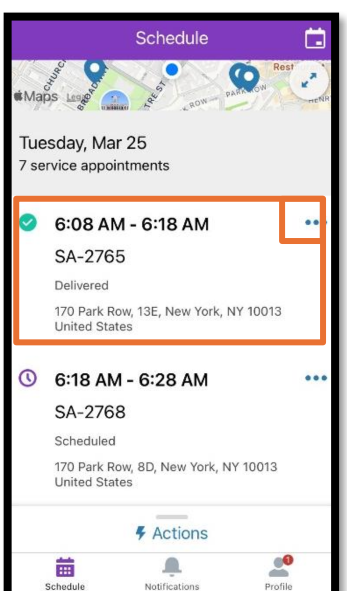


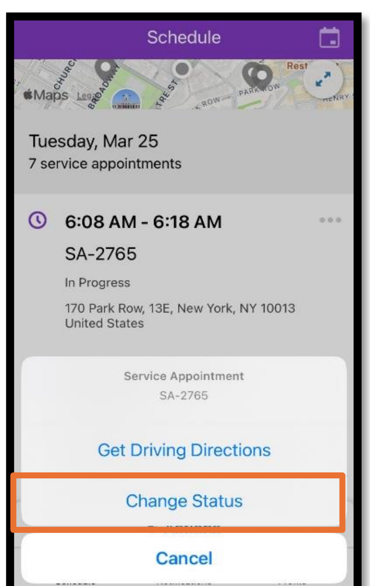


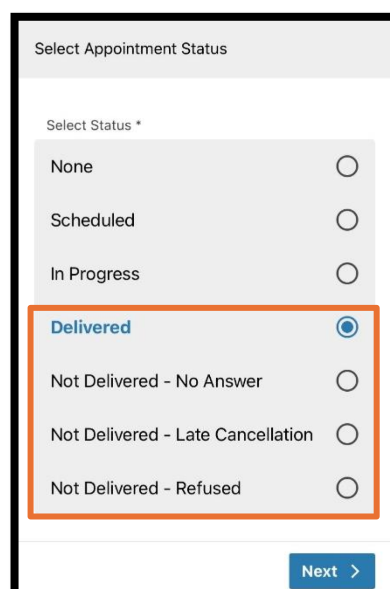
- From Change Status Reveal touch Change Status.
- From the Change Status page touch In Progress and the **Next** button.

Step 2: Mark the delivery Delivered or Not Delivered for a particular reason.

- From the Schedule Page (home page) touch the three dots.
- From the Change Status Reveal touch Change Status.
- From the Change Status page touch Delivered or Not Delivered for a particular reason and the **Next** button.







Step 3: Mark the next delivery in progress (same as Step 1).

Adding an Extra Meal

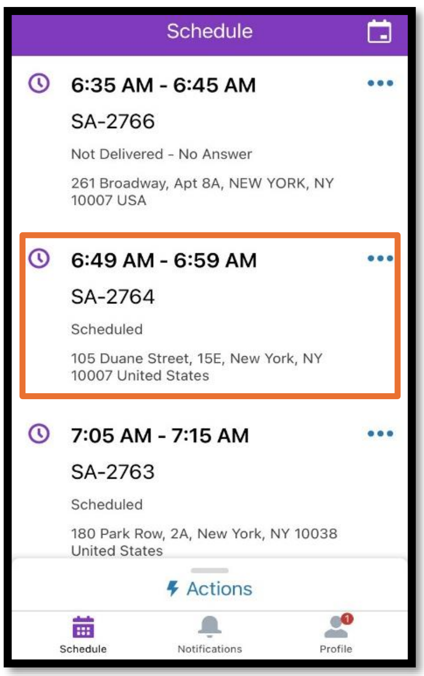
When a delivery is not possible, you can give and track that extra meal as given to another client.

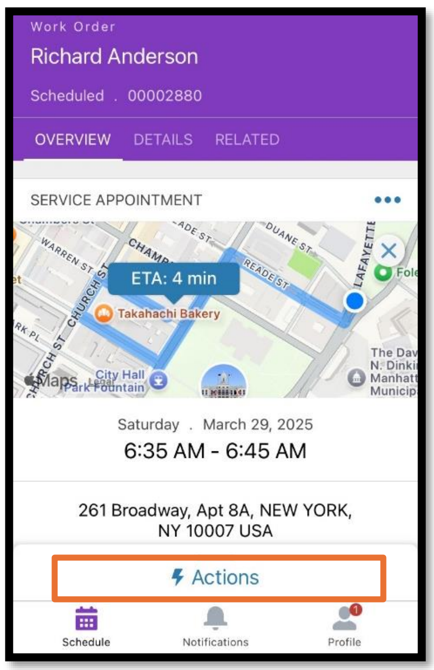
Step 1: Note track giving the extra meal to the client before marking that client's delivery.

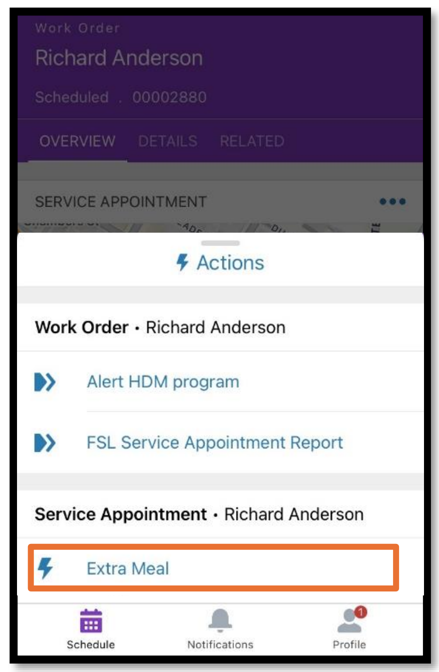
NOTE: *There must be an undelivered meal before an extra meal can be delivered.*

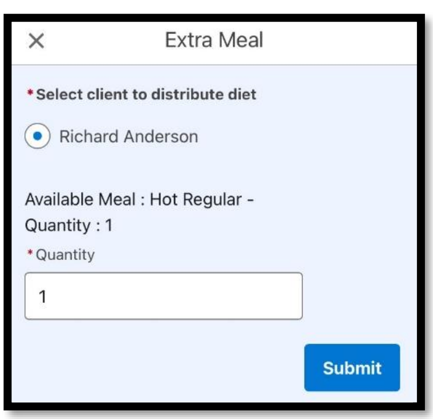
Step 2: From the Schedule page, touch on the extra meal recipient's Service Appointment area.

Step 3: From Service Appointment Overview, touch Actions to reveal options. Scroll down to view and touch the Extra Meal option.









Step 4: Touch to confirm that you will be giving the available meal to this client. Depending upon the available meals, you could offer more than one of the same or different diet types.

Step 5: Select Submit.

Page Legend

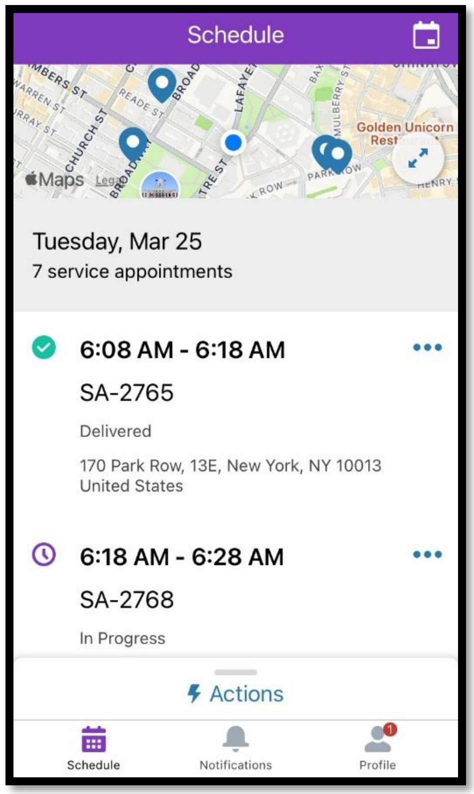
There are two primary navigational pages within the HDM App.

Schedule/Home Page

At the top of the page is an interactive map. Touch it for an expanded view.

Status icon: A clock when scheduled or in progress and green when delivered.

Actions reveal not used.



A calendar icon to view a month

The service appointment area, including the estimated time, Service Appointment (SA) number, status and address of the delivery.

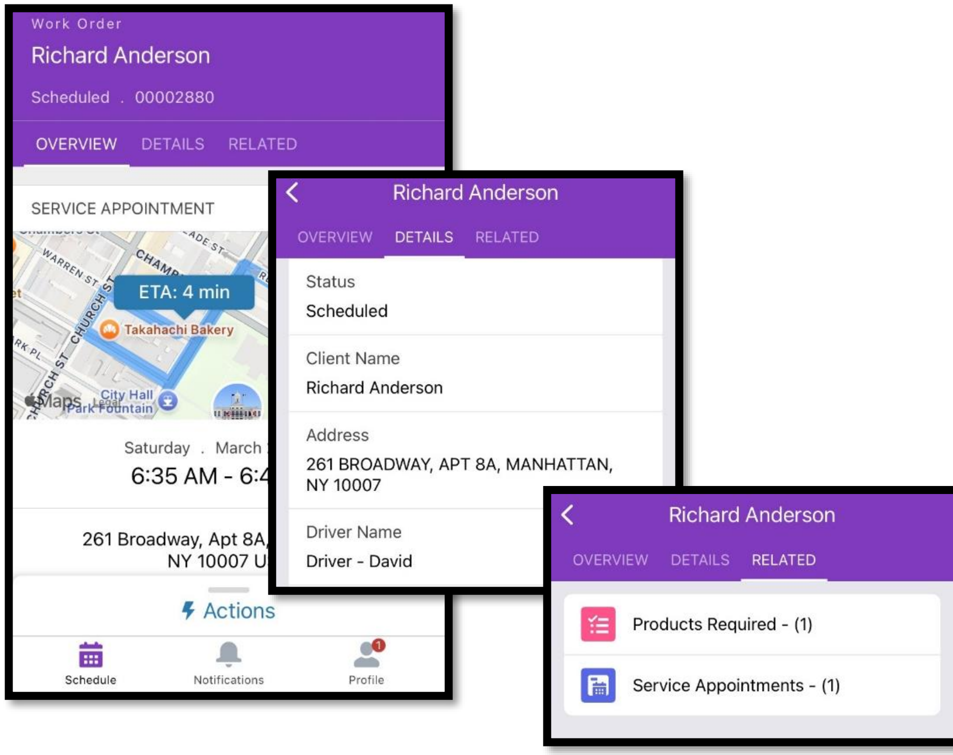
The three dots. Touch to change status.

Function tray available on all pages: Schedule returns to the home page, Notifications to a list of them and a link to your Profile.

Service Appointment Overview Description

There are three sections of the Service Appointment Overview.

- The Overview displays the client's name, links to Details and Related information. And if scrolling down provides a link to client details.
- Details displays more information about the client.
- Related is another view of the above that Salesforce provides.



Client Intake

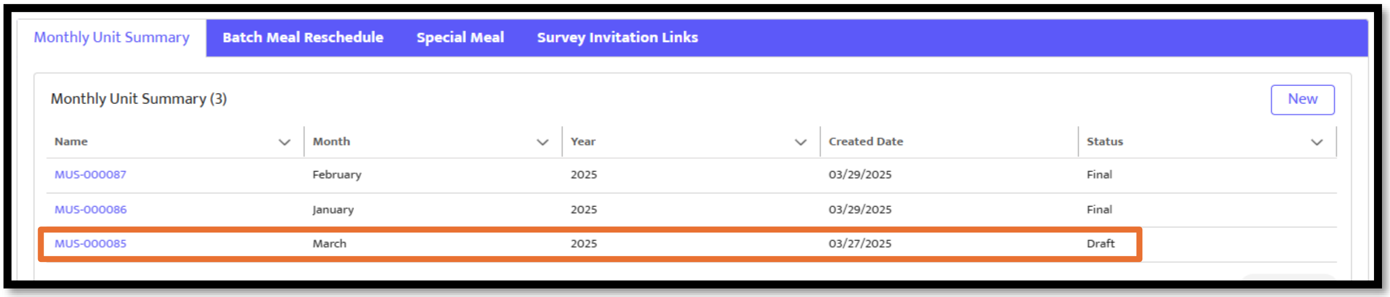
The majority of clients needing Home Delivered Meals are entered into VIVÉ by Case Management during intake. However, in rare situations, Home Delivered Meal providers can enter basic client information. They are not able to enroll a client into any programs. For more information on Client Search & Initial Data Entry.

Then contact your Case Management Agency to inform them there is a new client they should assess.

Monthly Unit Summary

The Monthly Unit Summary reports on your programs' units for a particular month. This report lists all service types available, so you may see services listed that are not provided by your program. Once the Monthly Unit Summary is finalized for a month, you will not be able to edit it. If you need to unlock the Monthly Unit Summary for a specific month, contact your Program Officer.

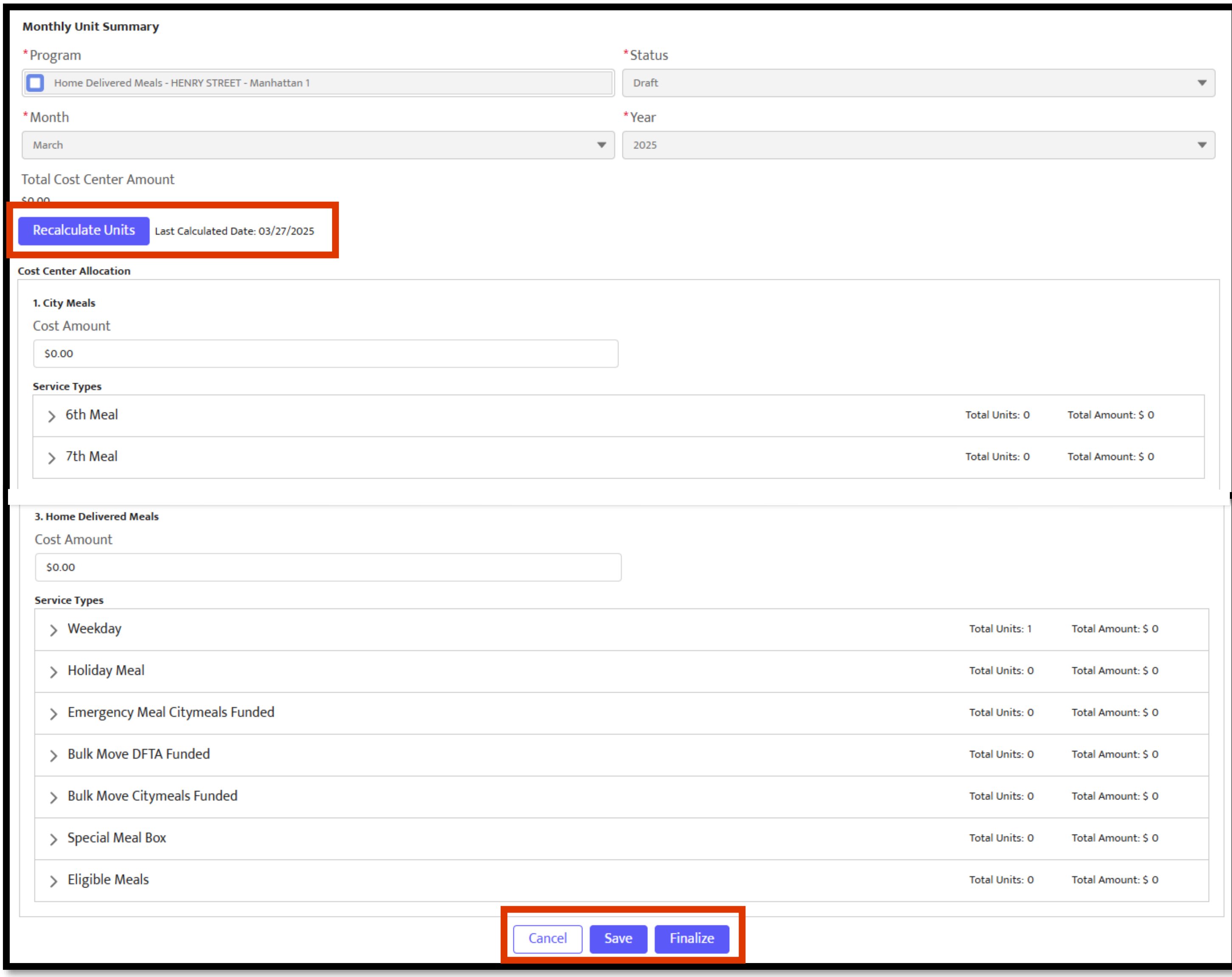
Step 1: From **Program Tools**, click on the **Monthly Unit Summary** tab. A list of the draft and final summaries will be displayed.



Step 2: Click on a draft **Monthly Unit Summary** name link. Confirm the **Month** and **Year**, which are required fields, then select **Recalculate Units**.

Step 3: The Balance of the **Monthly Unit Summary** will appear. Each **Cost Center Allocation** is totaled.

Step 4: Select **Save** to keep the **Monthly Unit Summary** in draft status. Once you have confirmed the units are correct, select the **Finalize** button.



From the Monthly Unit Summary list view select the **New** button to create a **Monthly Unit Summary** for another month. Then follow the above steps 3 and 4.

***TIP**: It is important that you check, double check, and triple check before finalizing the report. Once finalized, the report can only be unlocked by your program officer.*

Survey Invitation Links

VIVÉ makes available links to customer satisfaction surveys. Copy the links listed here and paste them into an email or other promotional materials to solicit feedback from your clients.

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:

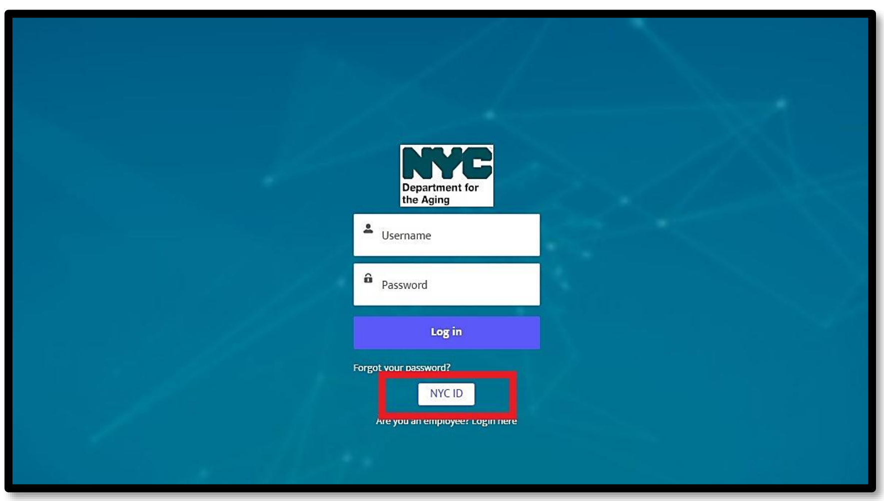
- **Logging into VIVÉ**
- **Accessing NYC.ID**

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.

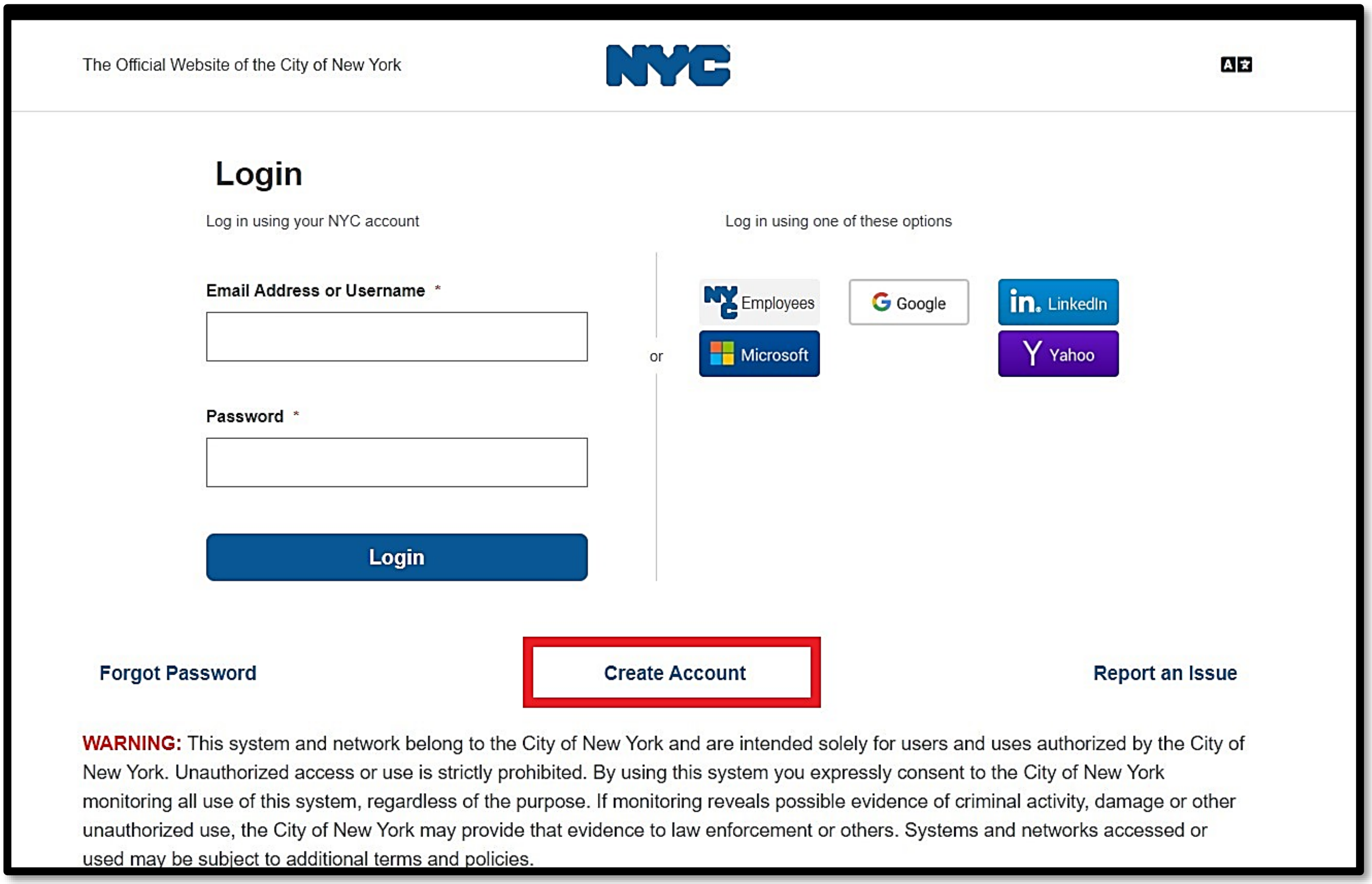
Note: *NYC.ID is different from an IDNYC. Don't have an NYC.ID? You must create an NYC.ID account to use VIVÉ.*



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

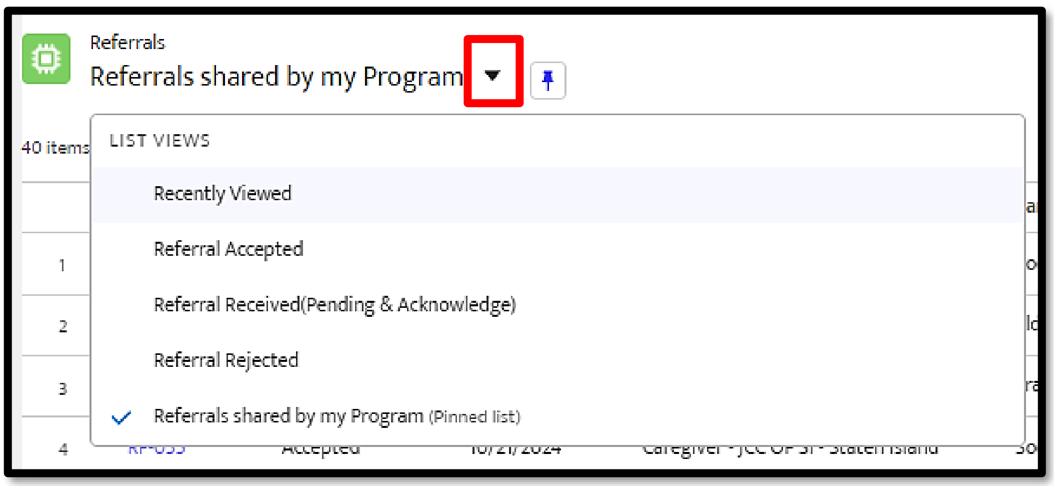
Overview of Referrals

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**.

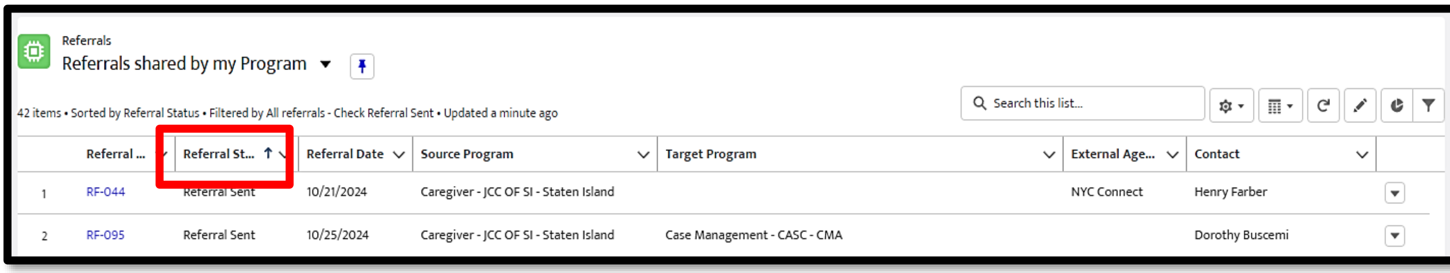
The Referral Queue displays referrals based upon status. You can pin your default view.



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.



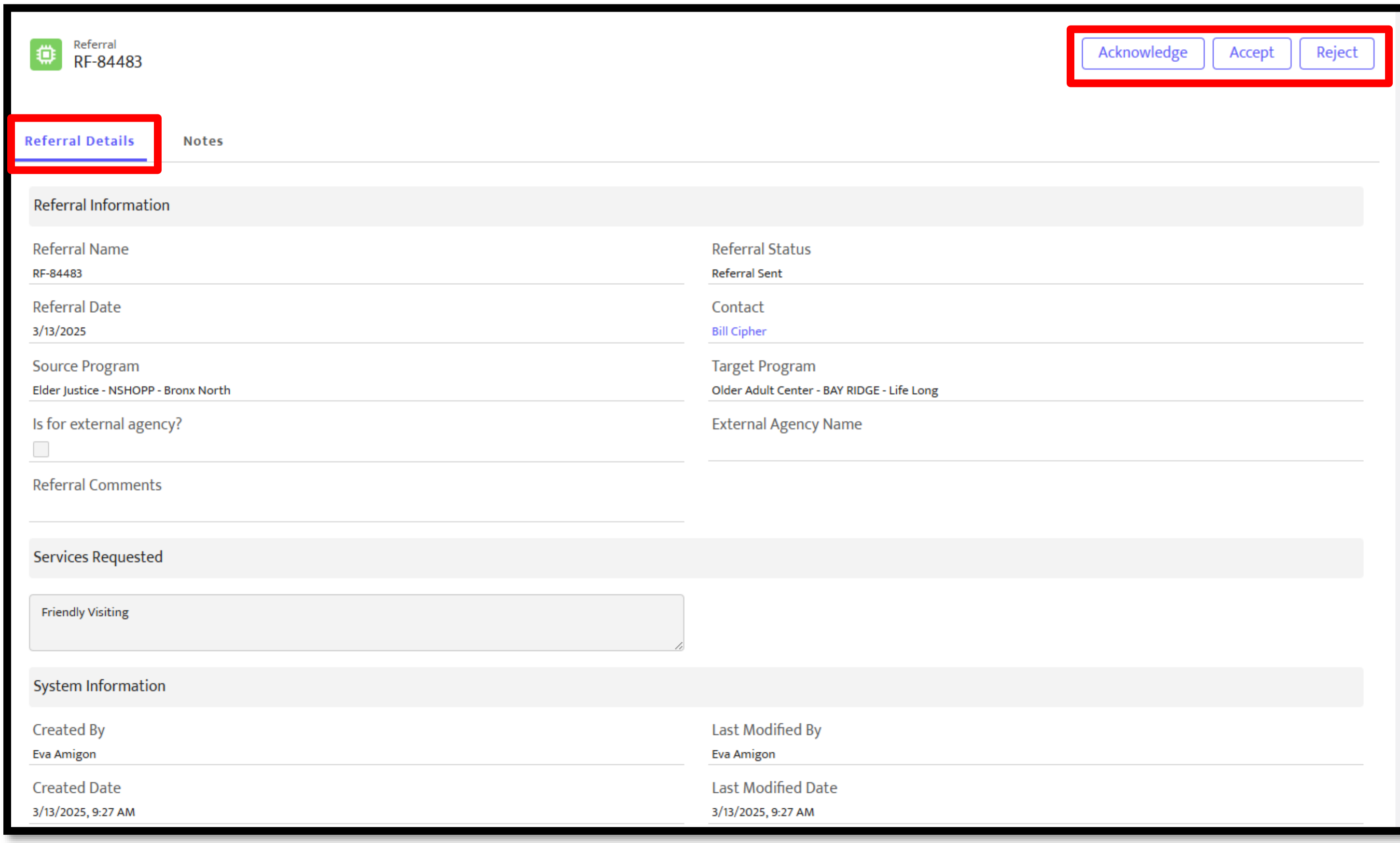
Referral Details

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.

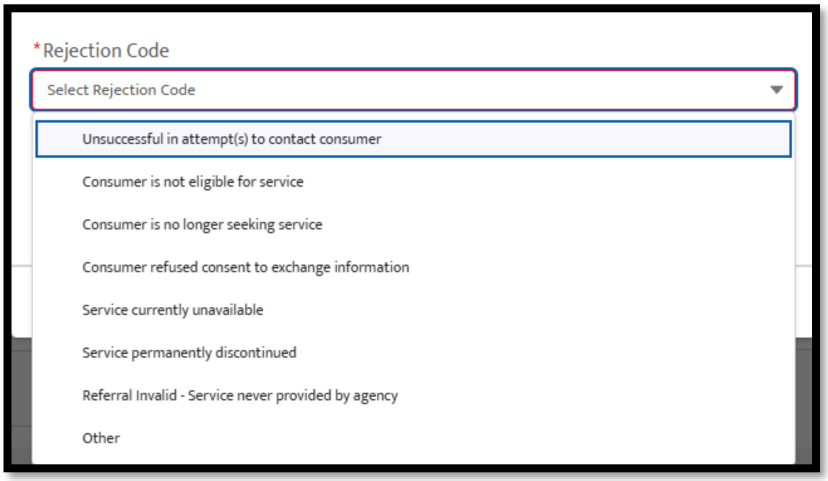


Accepting an Enrollment

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.**

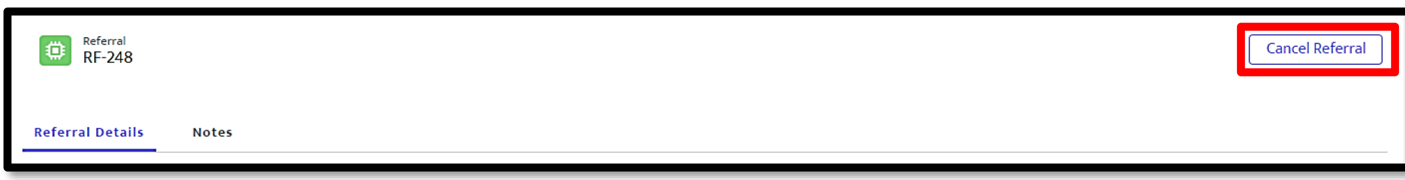
Rejecting an Enrollment

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

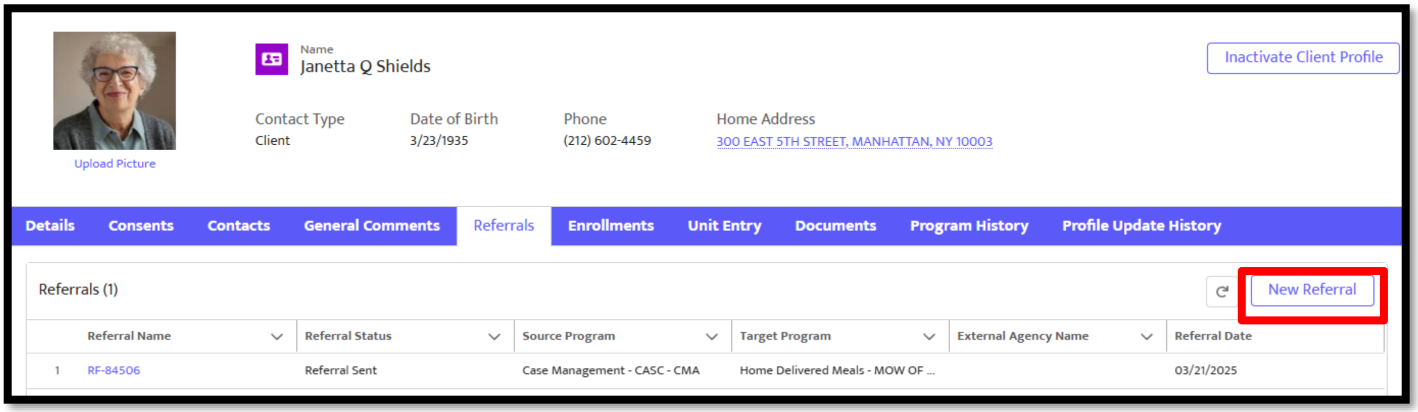
All referrals have a **Notes** tab. These notes are seen by both the source and target programs. A user may search and filter the notes of this specific referral.

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.

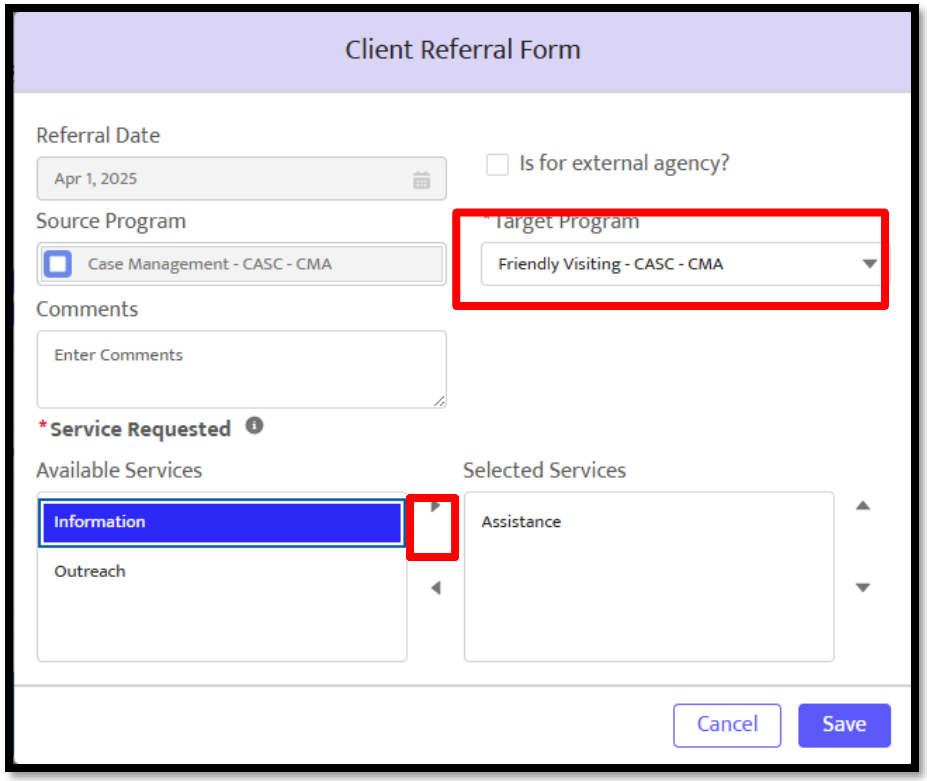
Step 2: Select the **New Referral** button.



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**.



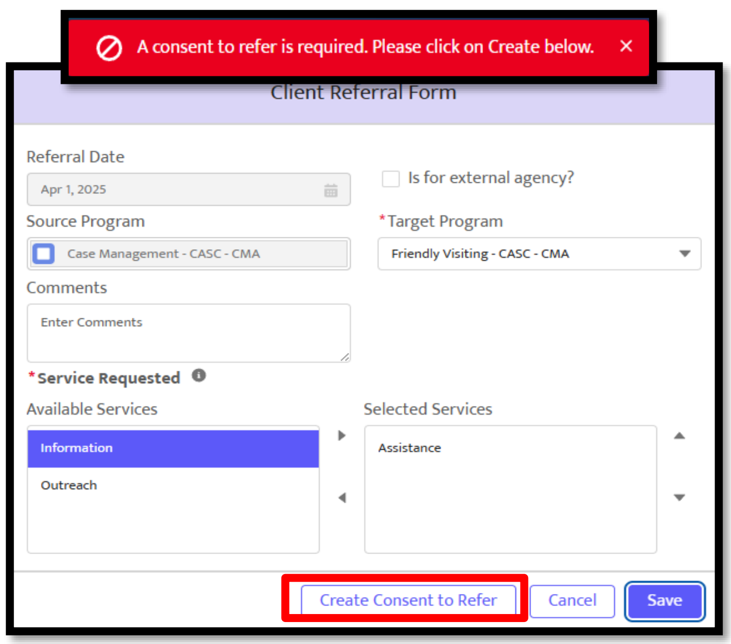
Completing Consent to Refer

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.



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Return to VIVÉ Knowledge Base

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

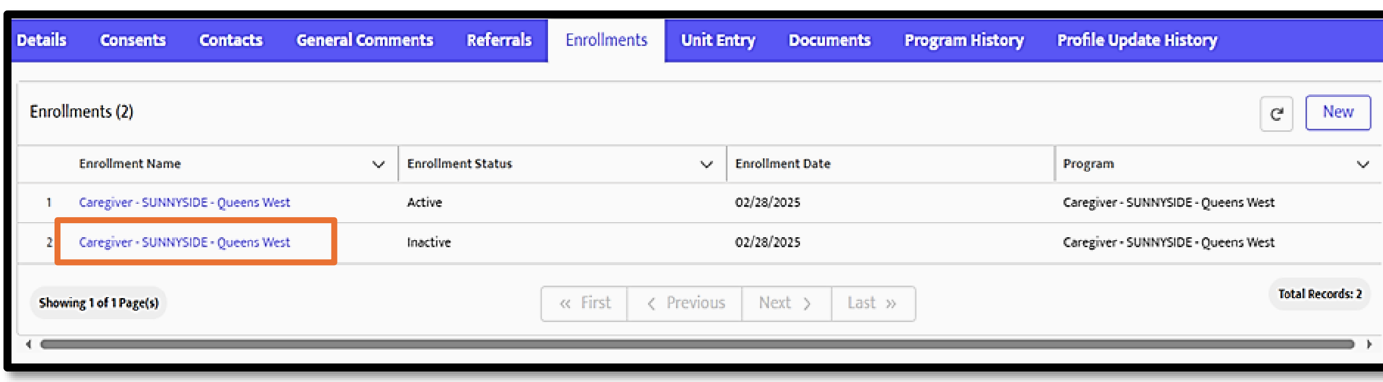
The **Enrollment** menu contains various tabs providing access to capture information about the client and track the work done on their behalf. The default tab on the menu bar will be **Enrollment Details.** Depending on the program type, the status of an enrollment will either default to **Active**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

Determining Client Enrollment

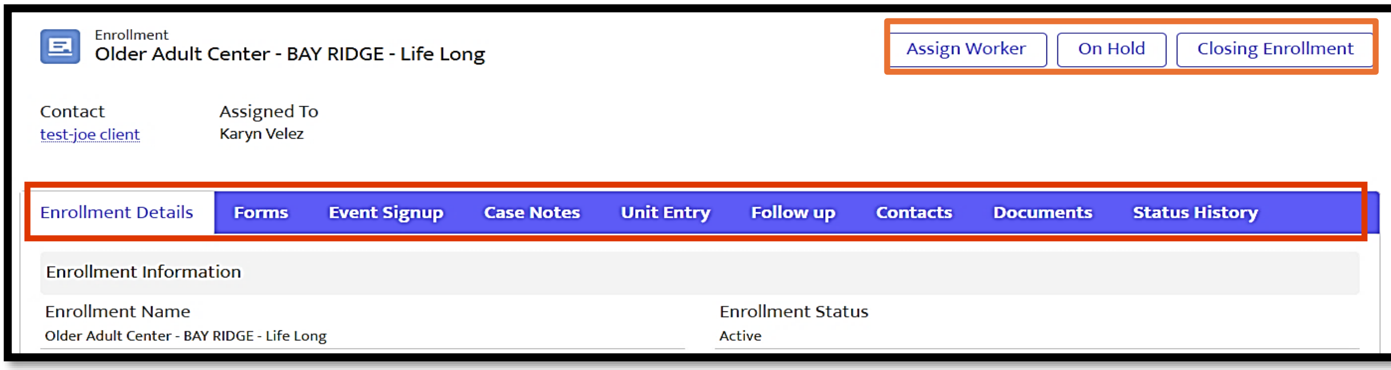
Step 1: Perform a **Client Search** and select the link of the desired client to open their profile.

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.

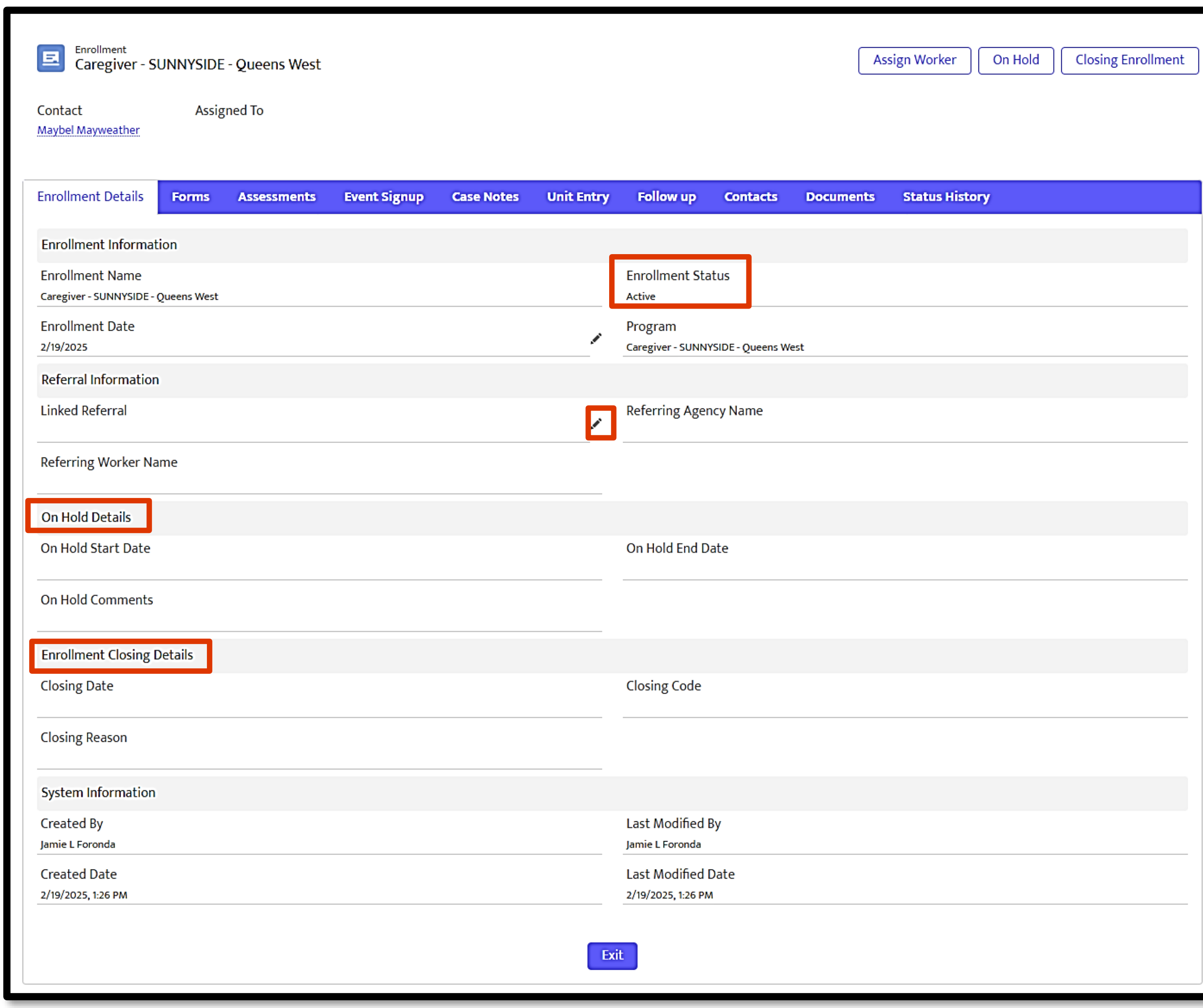


The top portion of the enrollment page will display the client's name, the name of assigned worker, and several navigational buttons that provide access to other database features. In addition, it also provides an overview of the enrollment record, **Referral Information**, **On Hold Details**, **Enrollment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



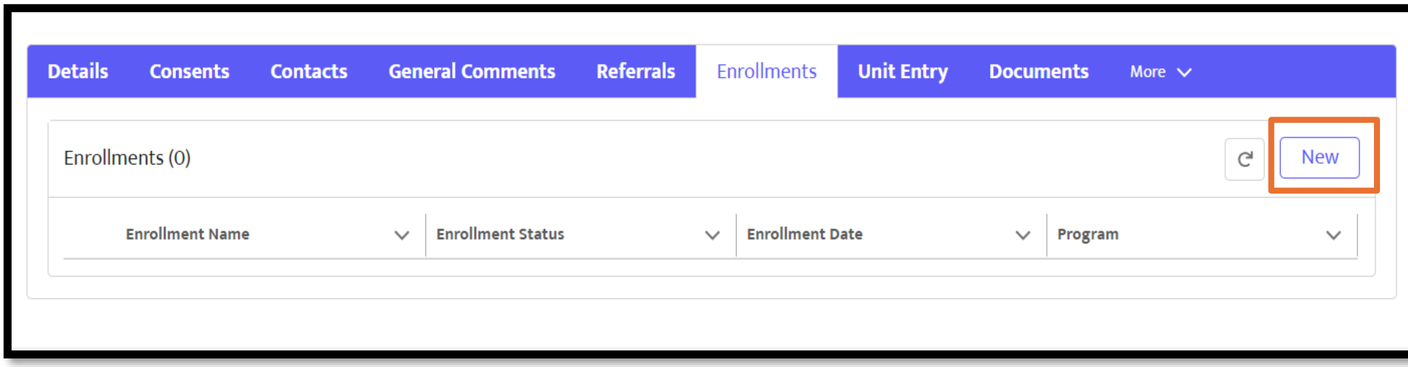
Creating Enrollments

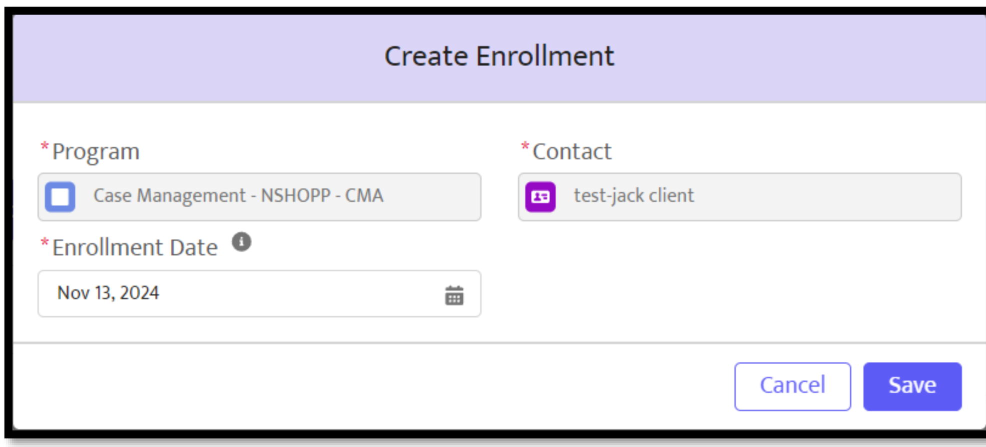
The **Enrollment Status** of the client will also display as **Active** by default unless changed. If no record is displayed on the Enrollments list view, then a new enrollment can be created.



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.

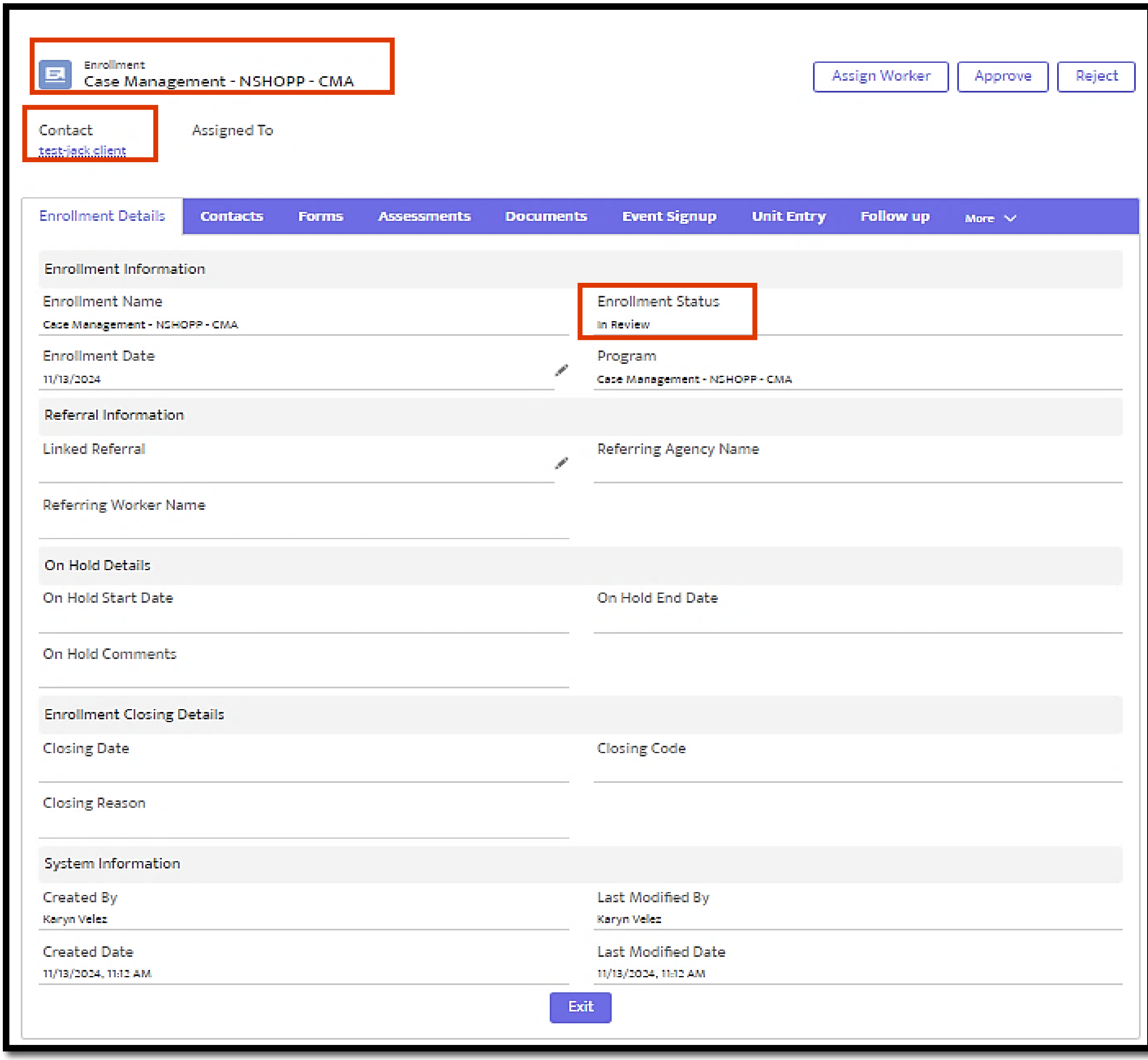
Step 3: Confirm all information is correct before selecting **Save** and you will be directed to the **Enrollment Details** section.

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.

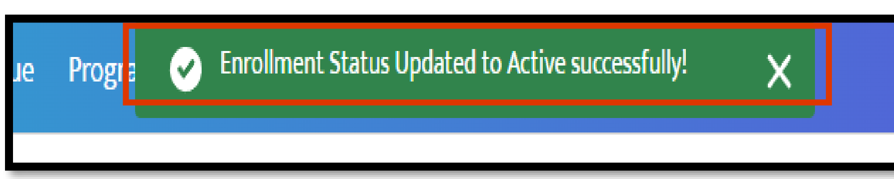
Enrollment: Additional Features

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

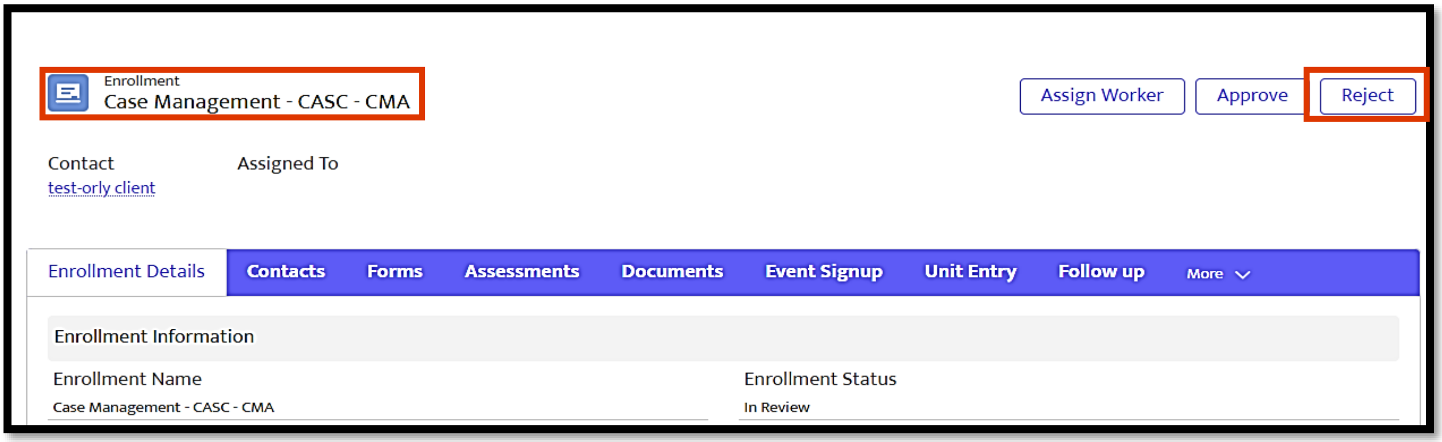
Programs who must **Approve** clients before the status of their enrollment can be updated from **In Review** to **Active** will see the **Approve** button displayed on the **Enrollment** screen. Once the **Approve** button is selected, a notification of successful activation will display. *(See below)*



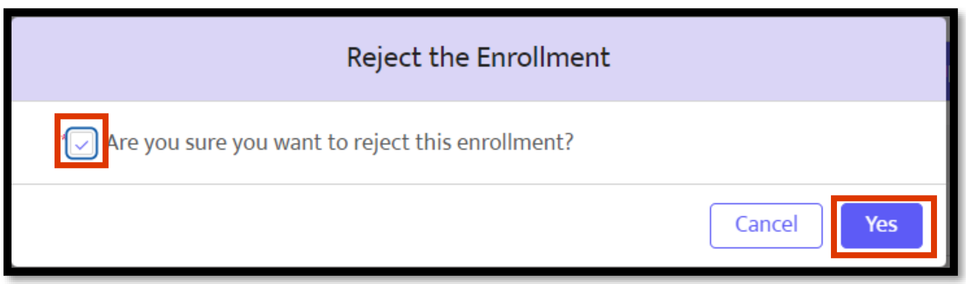
The **Approve** and **Reject** buttons from the **Enrollment Details** screen are replaced with a **Closing Enrollment** button. The status of the client's enrollment updates to **Active**.

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?"



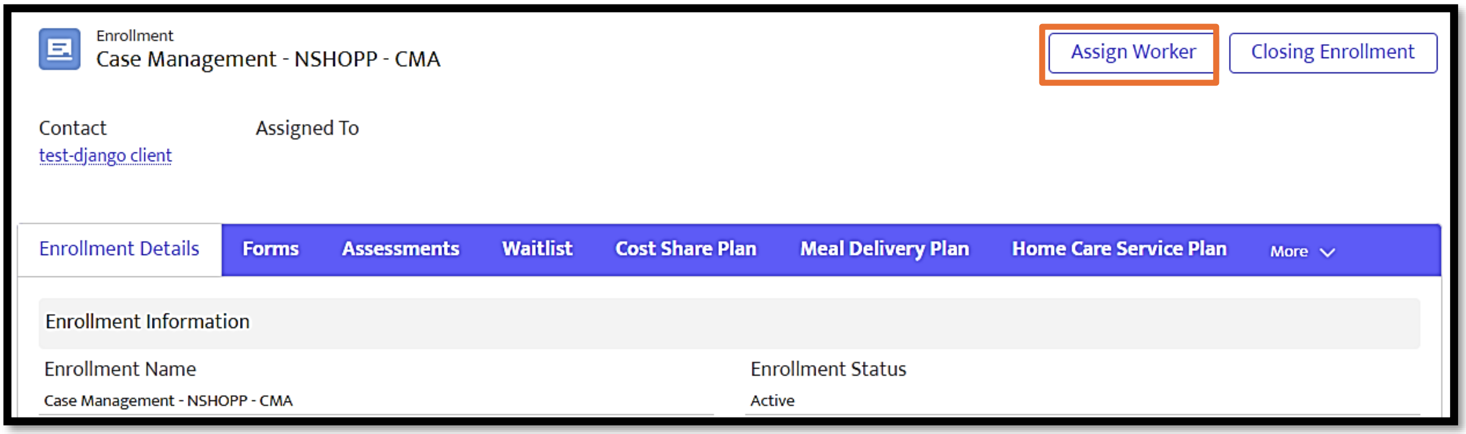
Step 3: Select **Yes**. The **Enrollment Status** will be set to **Inactive** on the **Enrollment Details** page.

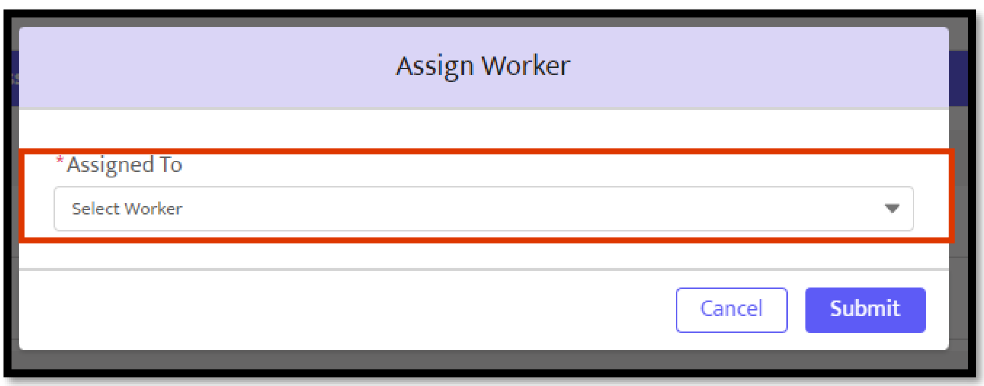
NOTE: *If the **Reject** button is selected, the client's enrollment will be **Inactivated**. To "reactivate" the client's enrollment, a new **Enrollment** will need to be created.*

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.



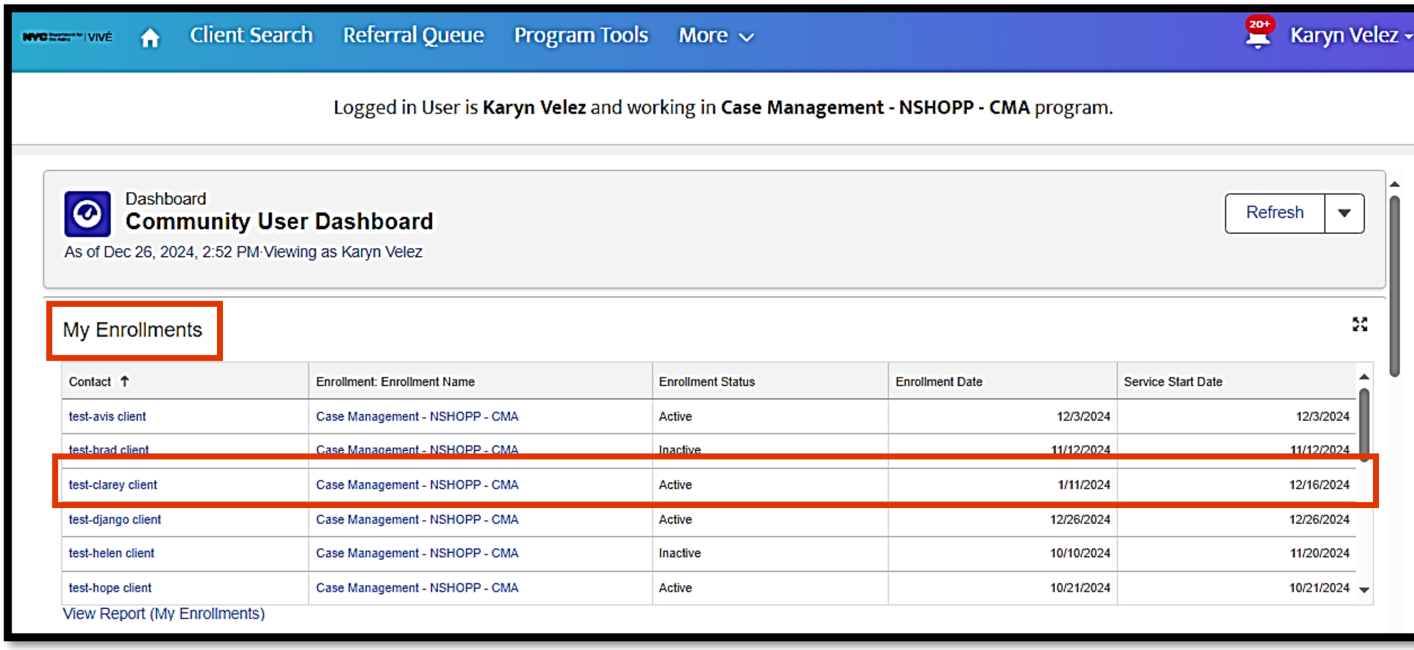


Step 2: Pick the worker's name who will be assigned to the client and select **Submit**. The worker's name will be added to the **Enrollment** screen's **Assigned To** field. A user can also view their assigned enrollment(s) through the **Dashboard** in the **My Enrollments** section.

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

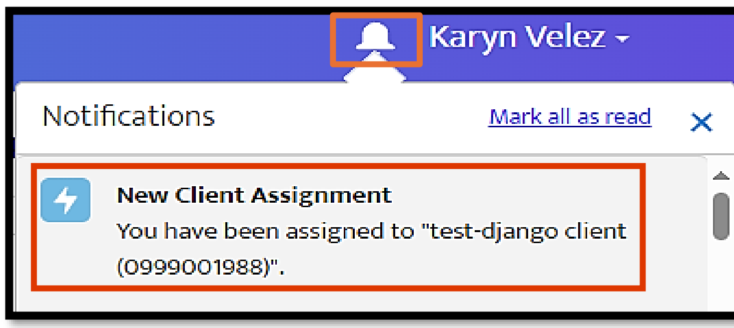
My Enrollments in Dashboard

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.



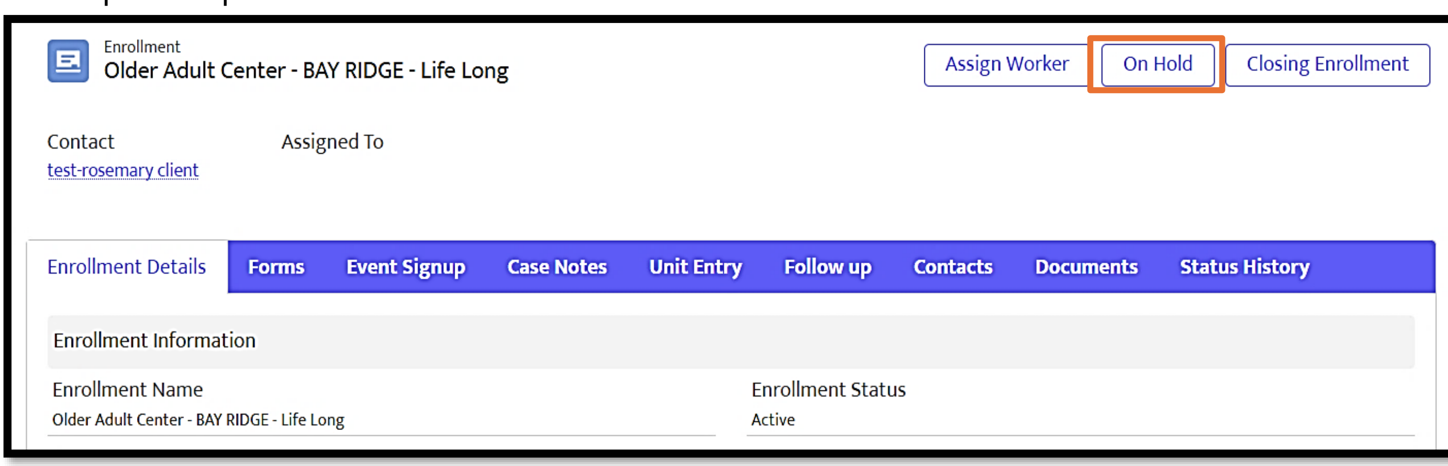
In addition, a notification prompt regarding the recently assigned Enrollment will display in Notifications. To view this request, select the Bell Icon.

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



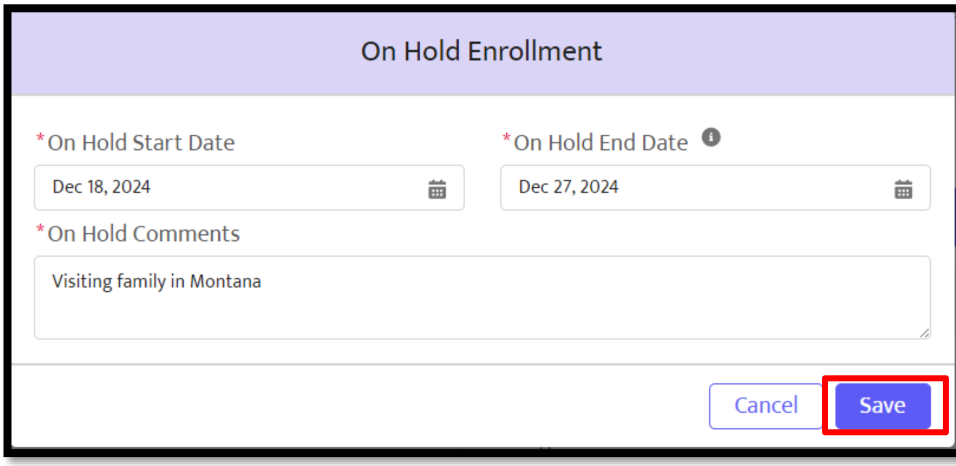
Place an Enrollment On Hold

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



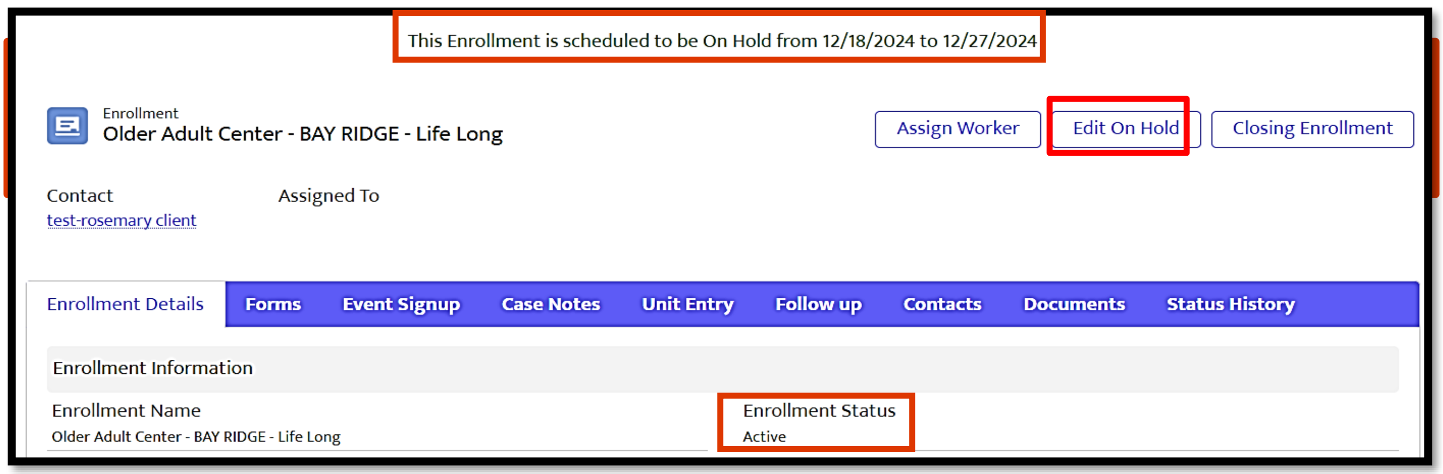
Step 1: Select the **On Hold** button. The **On Hold Enrollment** pop-up will display.

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.



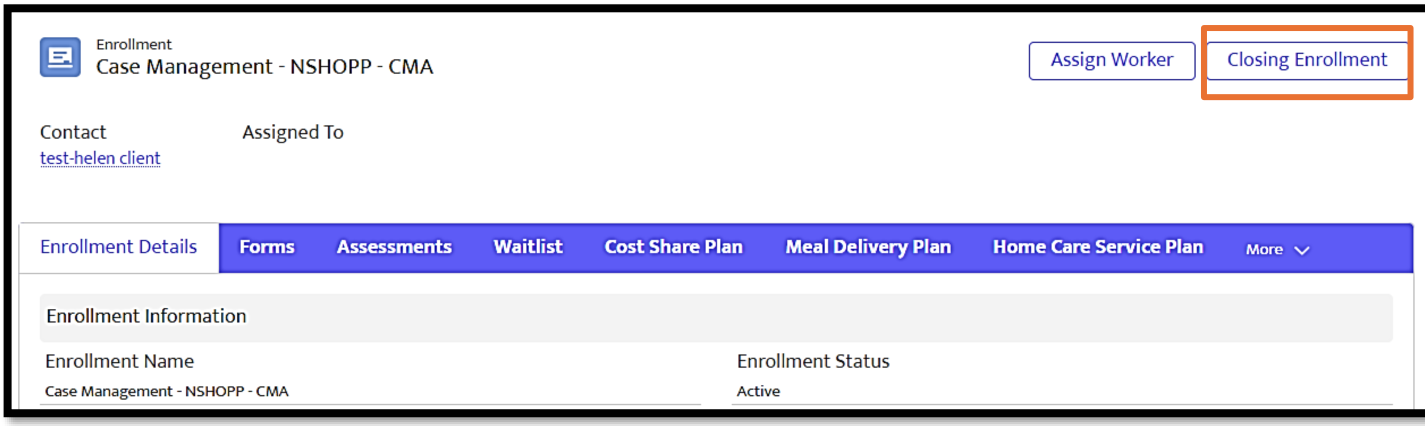
Fill in all required fields in the **On Hold Enrollment** form. Fields with a red asterisk (*) are required. Select **Save.**

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

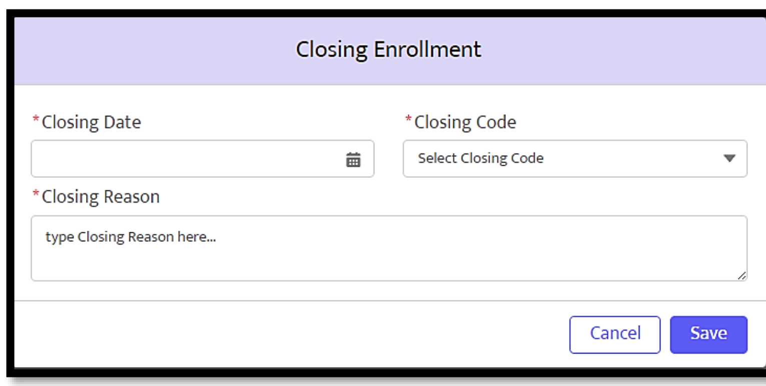
On the **Enrollment** screen, the **Closing Enrollment** button is available to close a client's record in your specific program.



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.

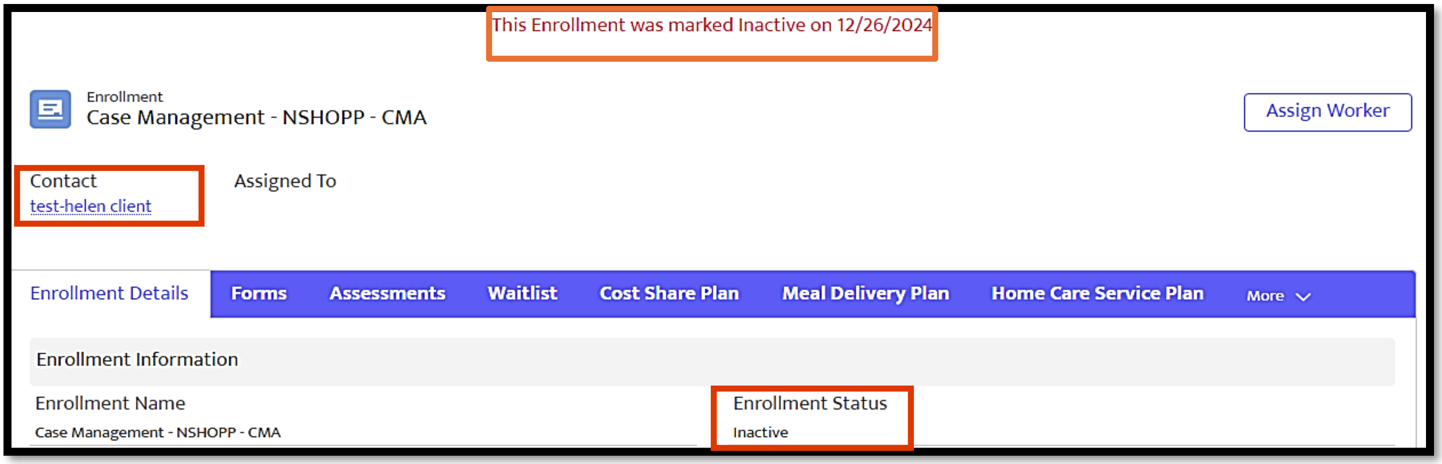
Closing an Enrollment: Past date



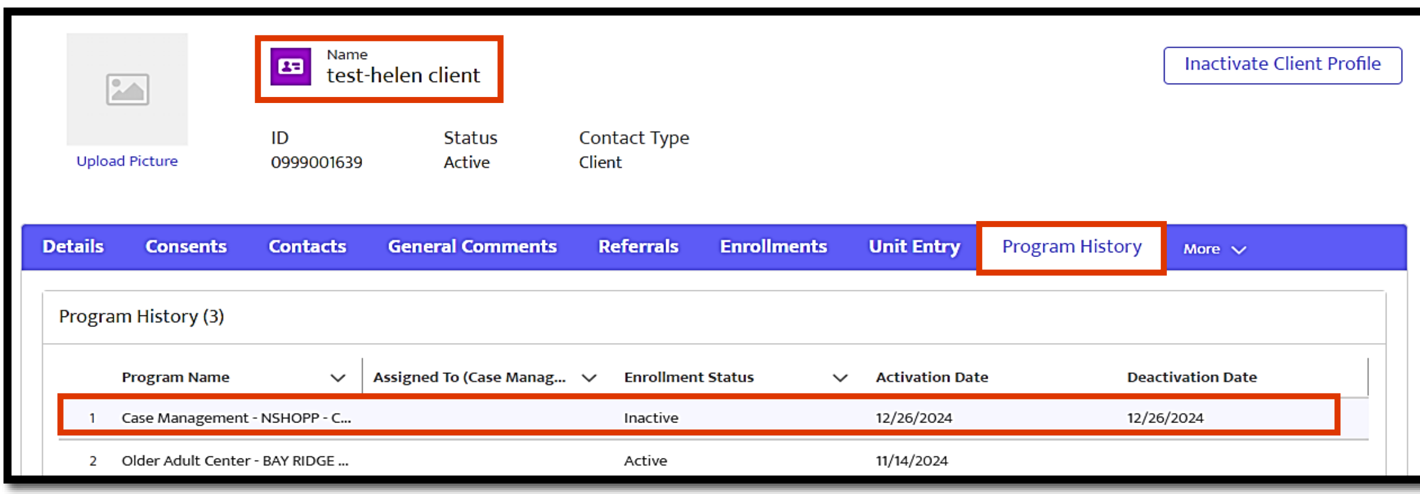
Step 1: Select the **Closing Enrollment** button. The **Closing Enrollment** pop-up will appear with the required fields **Closing Date**, **Closing Code** and **Closing Reason**.

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.

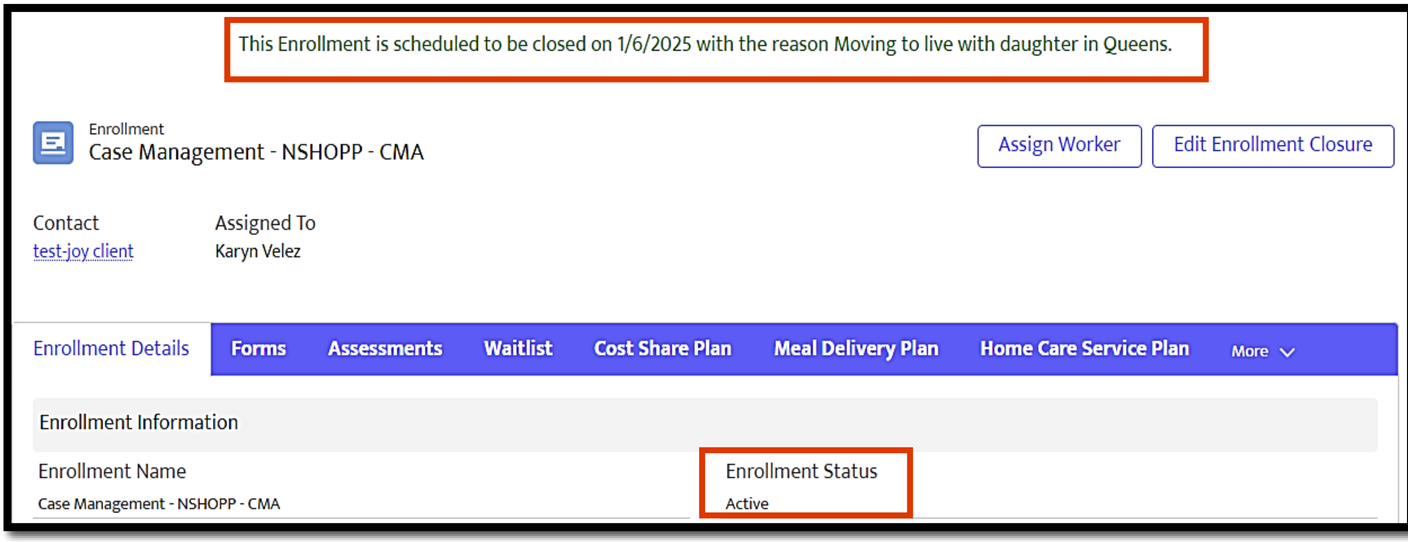


NOTE: *To protect client confidentiality, there are four programs that will never display the client's enrollment status on Program History. These programs are Elder Justice, Geriatric Mental Health, Elderly Crime Victims Center and Legal Services.*

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

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

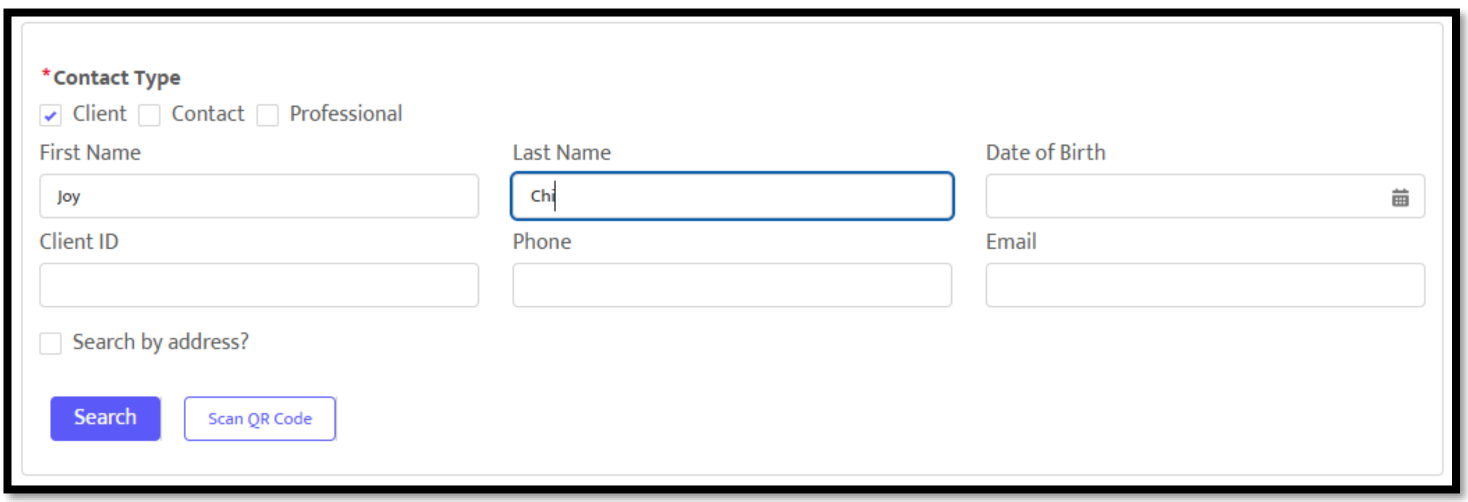
Beginning Your **Client Search**

From the dashboard, click Client Search.

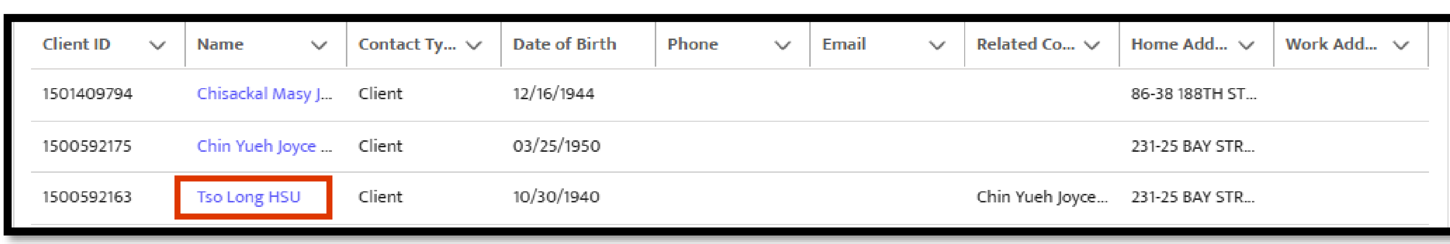
Indicate if you are searching for a Client, a Contact, or a Professional by checking the box.

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 QR Codes)

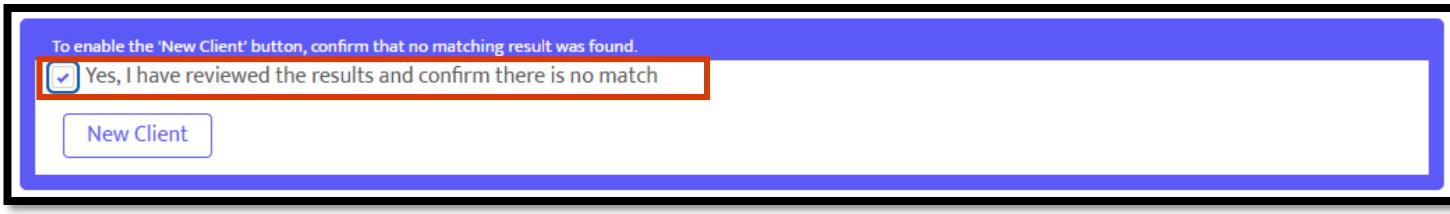


If the person you are looking for is on the list, click on the client's name. This opens the client's profile.



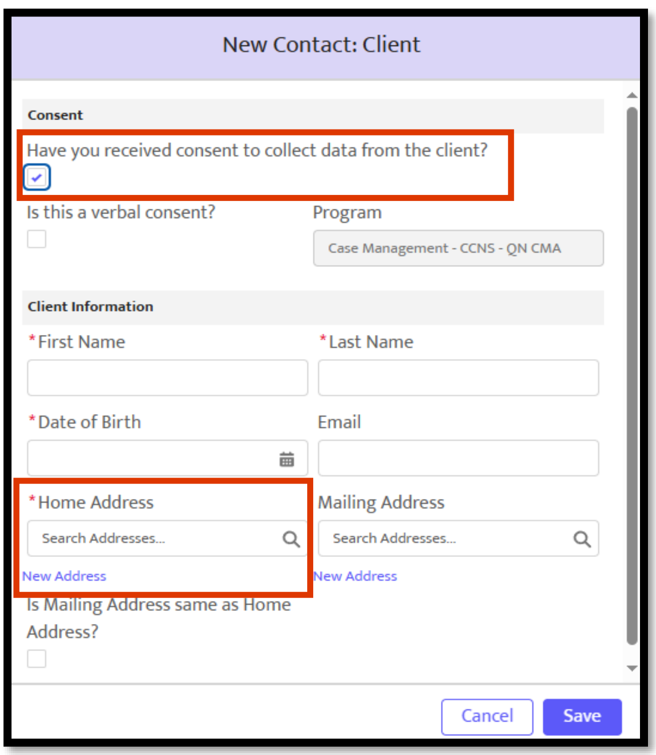
Client ID	Name	Contact Ty...	Date of Birth	Phone	Email	Related Co...	Home Add...	Work Add...
1501409794	Chisackal Masy J...	Client	12/16/1944				86-38 188TH ST...	
1500592175	Chin Yueh Joyce ...	Client	03/25/1950				231-25 BAY STR...	
1500592163	Tso Long HSU	Client	10/30/1940			Chin Yueh Joyce...	231-25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

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



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.

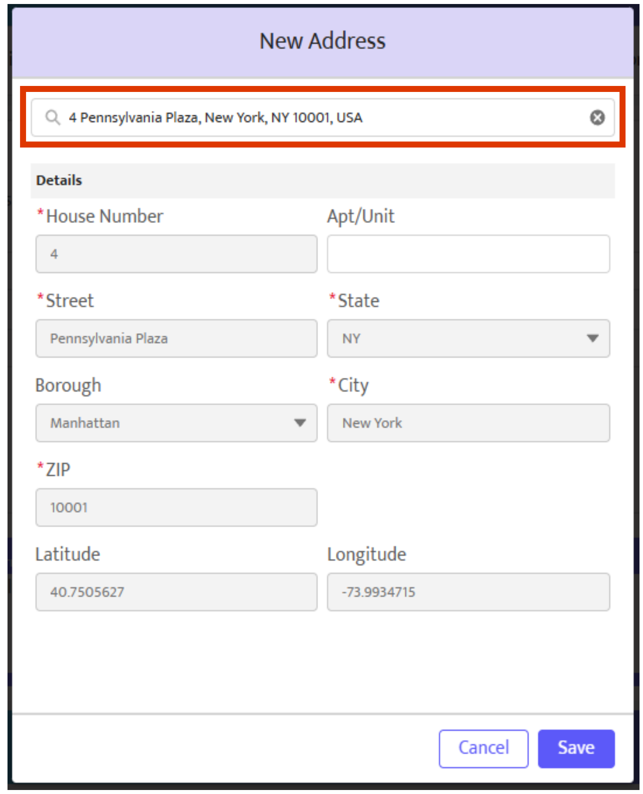
To find addresses, there is a search box for the Home Address. Enter an address and if it was previously entered,then you can select it. Please note the address including the apartment number must match.

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.

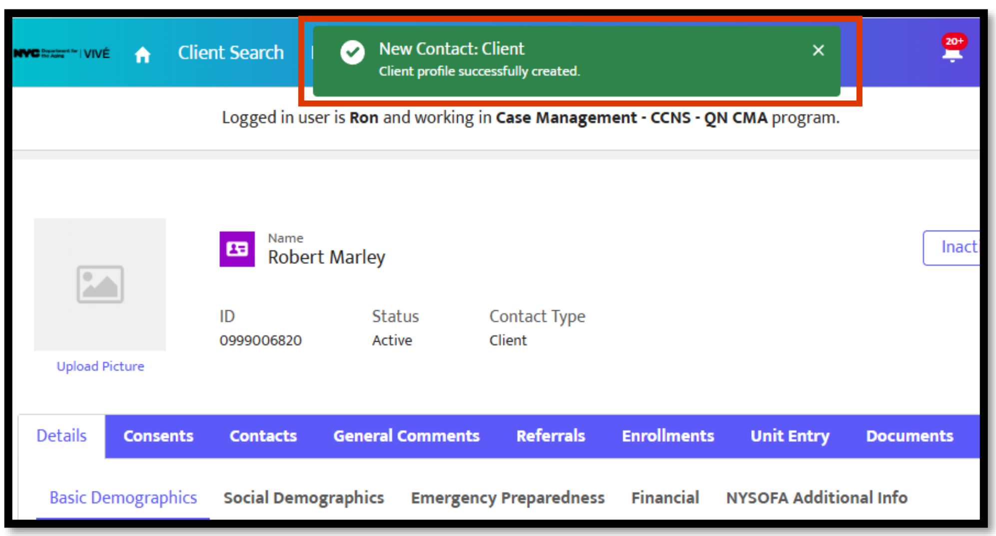
Once you've selected the address, the remaining fields will be populated. **You will need to add the Apt/Unit field.**

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

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

Return to VIVÉ Knowledge Base

Return to VIVÉ Knowledge Base

The VIVÉ Follow Up Reference Guide

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

Follow Up is a common functionality within VIVÉ that provides the ability for you to either assign to yourself or be assigned by others follow up assistance notifications for clients. You may access this guide from the VIVÉ Knowledge Base or from a program specific reference guide. At the beginning and end of this document is a link to return to the VIVÉ Knowledge Base. Or you can use your browser's back button to return to the program reference guide.

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

In this guide you will learn to:

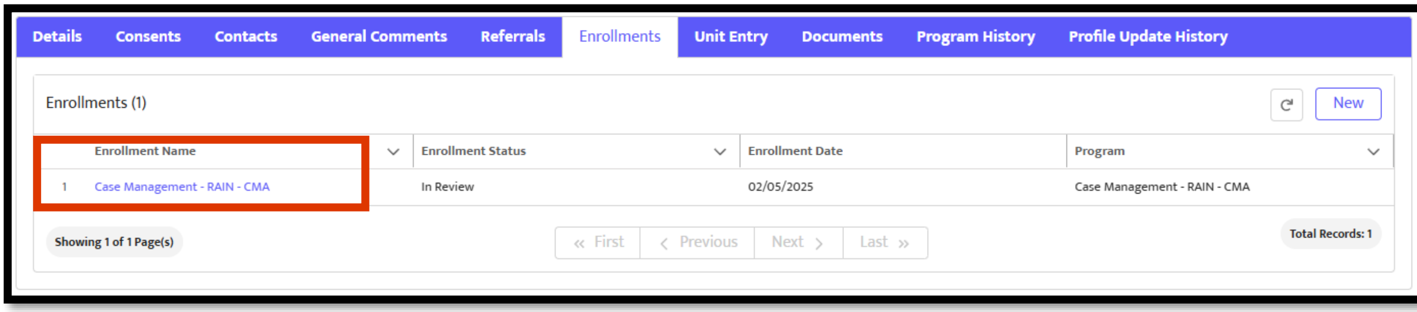
- **Follow Up Overview**
  - Create a Follow Up Request:
- **Receive a Follow Up Request**
- **Edit a Follow Up Request**

Follow Up Overview

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

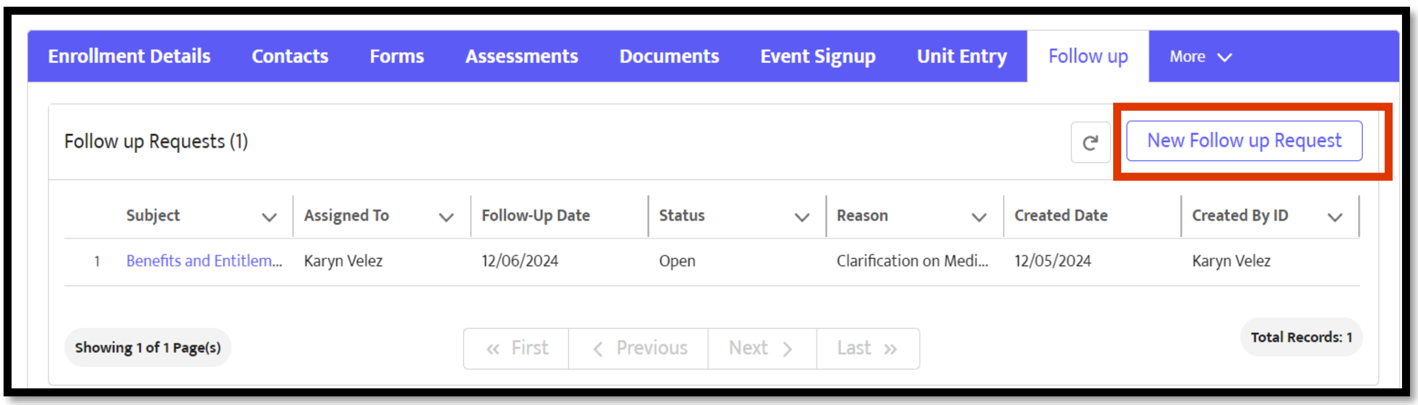
Create a Follow Up Request:

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



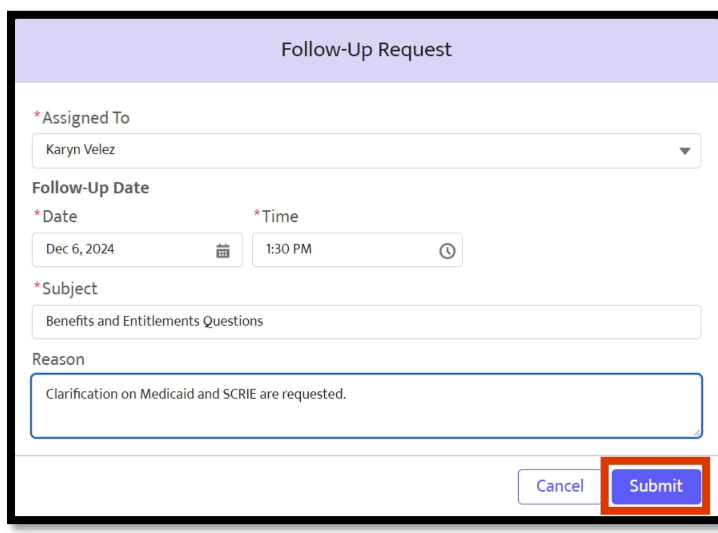
Step 2: Click the **Follow Up** tab. This tab displays the follow-ups that are associated with this contact.

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**.

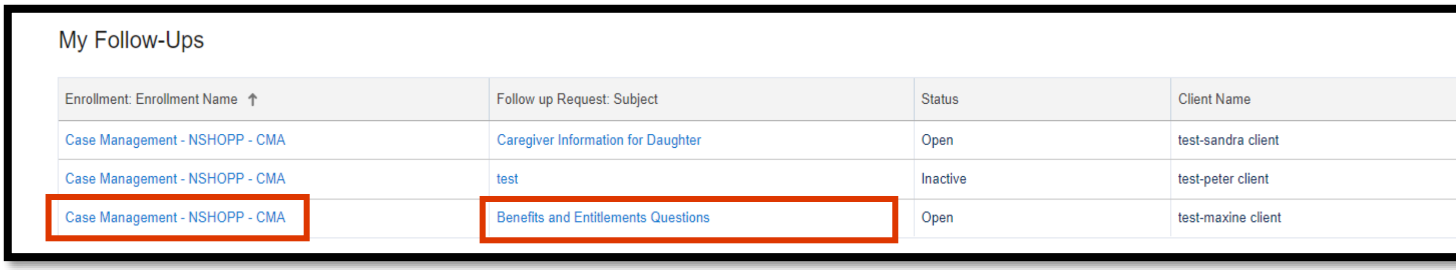
NOTE: *The **Follow Up** request will prompt a notification to the assignee and the details will appear on their Dashboard. (For more information on the Dashboard)*



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.



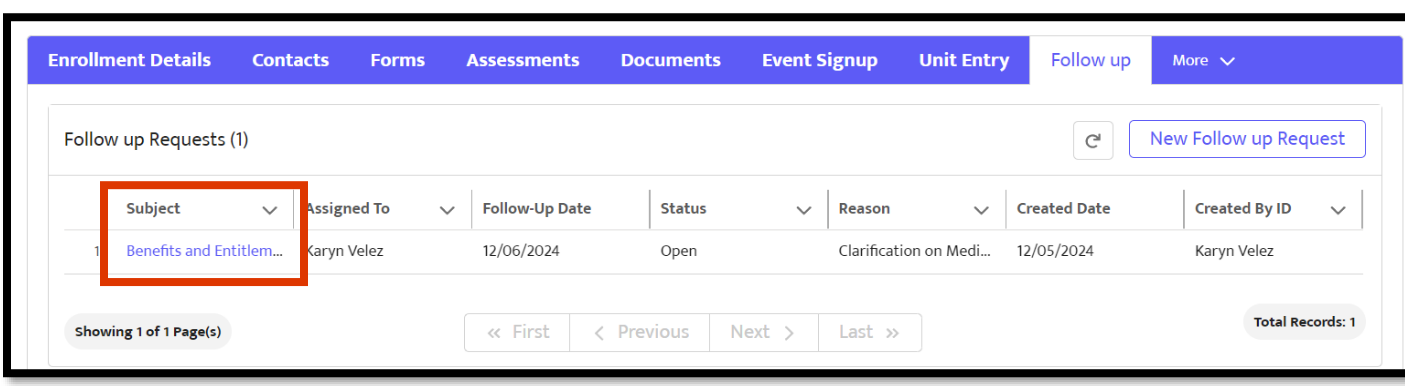
In addition, a notification prompt will be displayed in the assigned worker's **Notifications.** To view this request, the worker can select the **Bell Icon** on the **Top Menu**. Key information about the **Follow Up** will be included in the notification.

Edit a Follow Up Request

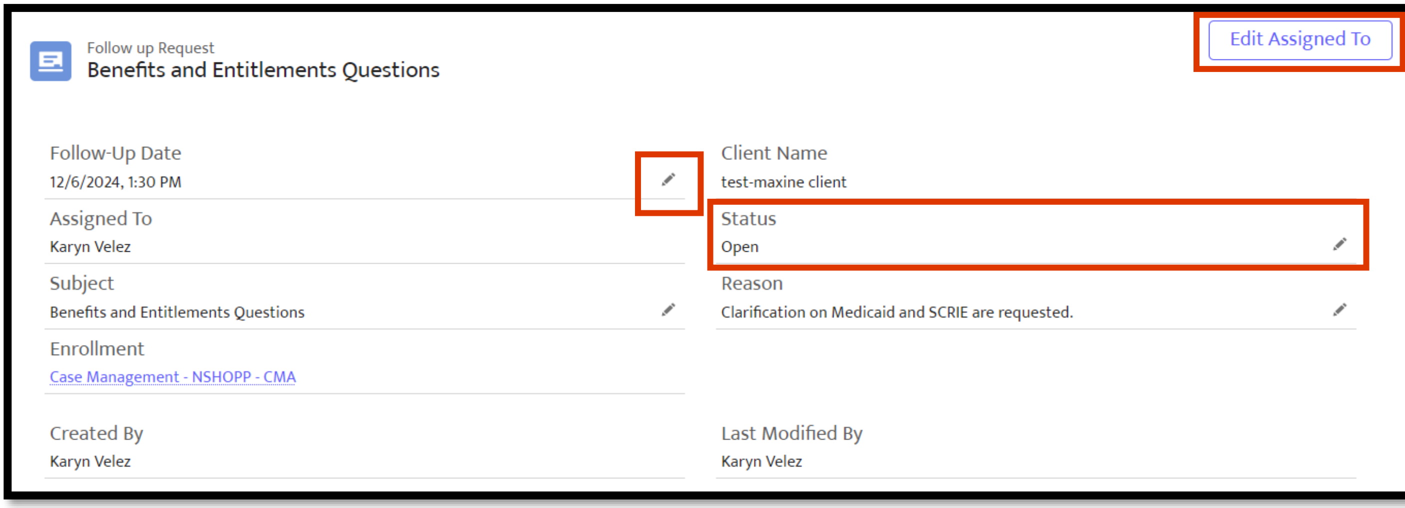
Information details in the **Follow Up** request can be edited prior to the request's **Follow Up** due date or after the request has been completed.

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

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

Return to VIVÉ Knowledge Base

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.

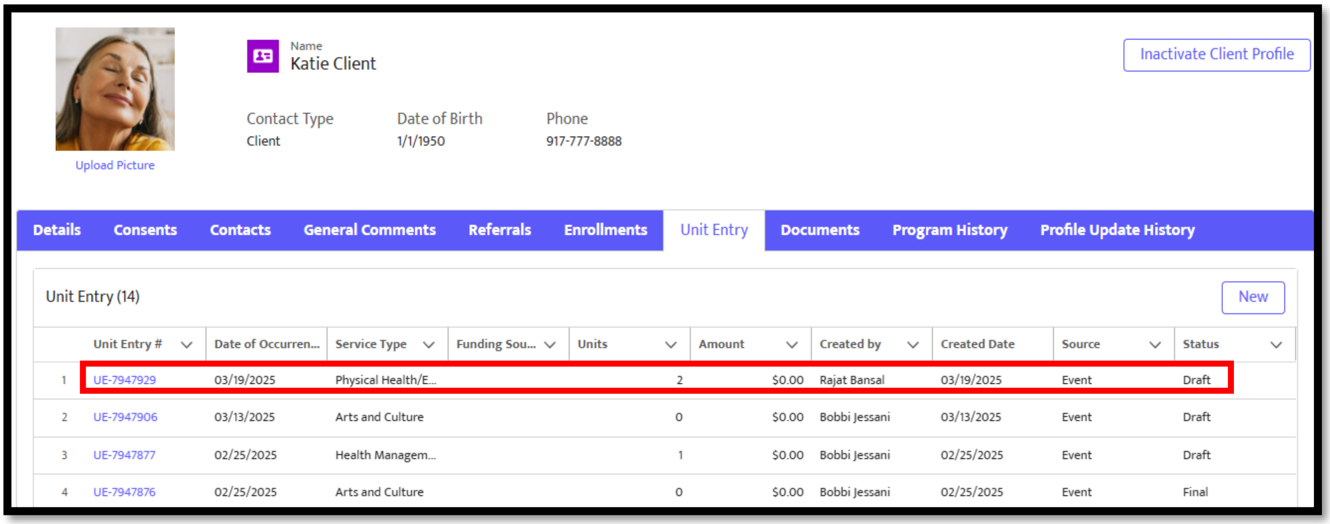
You can enter units in VIVÉ in three places: **Details Menu**, **Enrollment Menu**, or **Program Tools**. For more information on Events.

Editing Existing Units from Details Menu

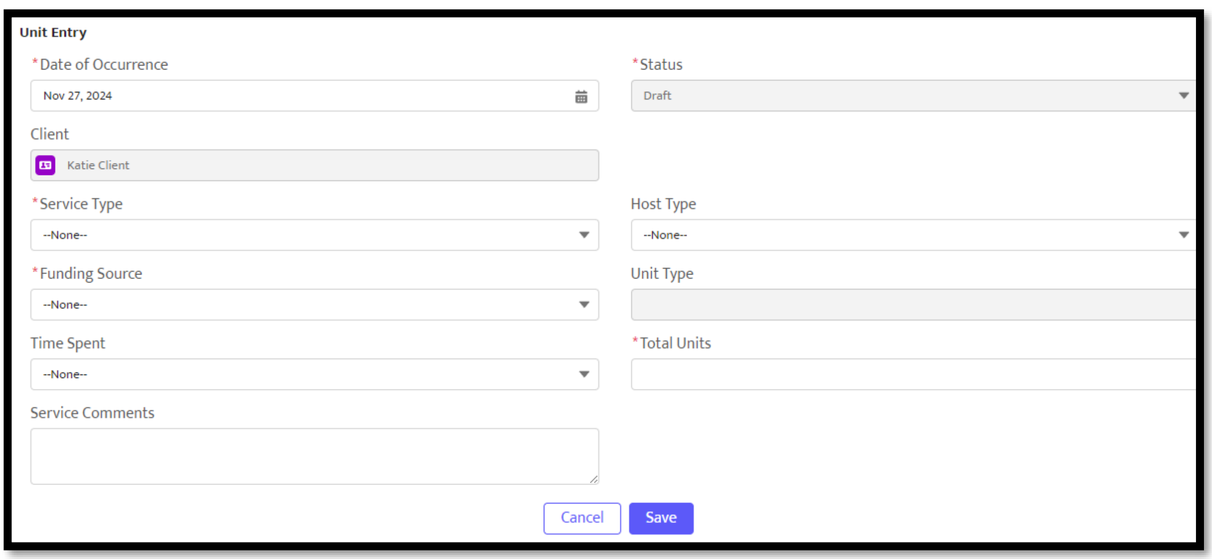
Step 1: From the **Top Menu**, click **Client Search**, find the desired client and click their name link.

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**.



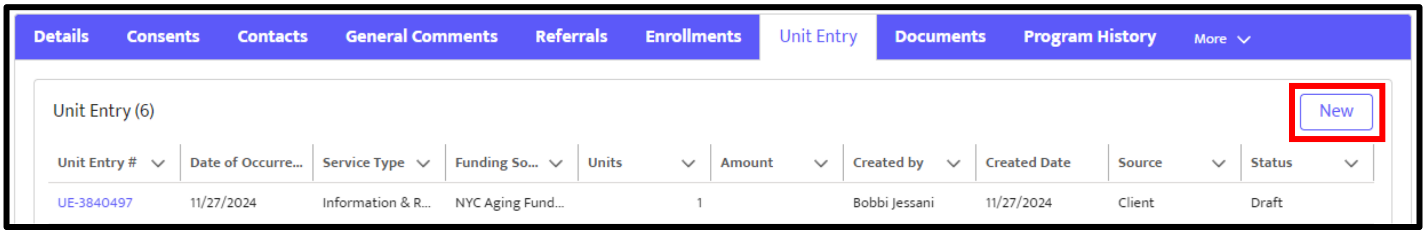
NOTE: *Units are in draft status until the Monthly Unit Summary is finalized. More on that below.*

Entering Units via the Details Menu

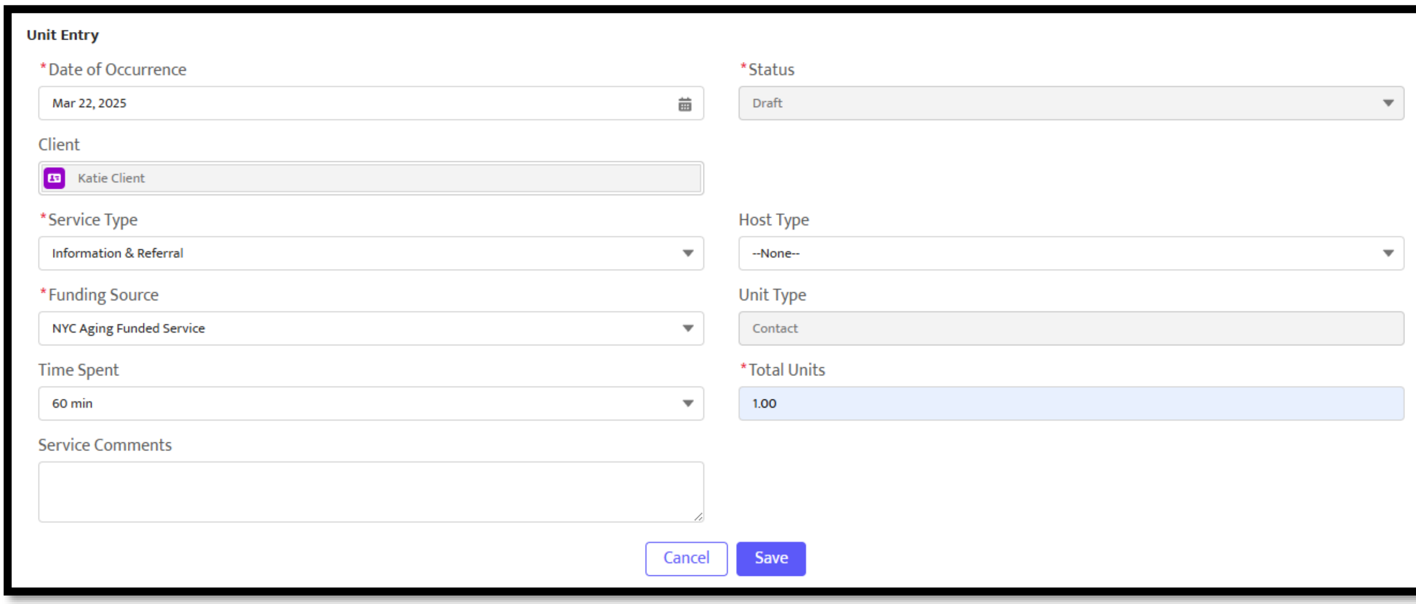
Certain service type units can be entered here entered from the **Details Menu** (also referred to as, Client Profile). For example, Information & Referral (I&R) unit types can be entered here. For other unit types for enrolled clients, access **Units Entry** from the **Enrollment Details Menu**.

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

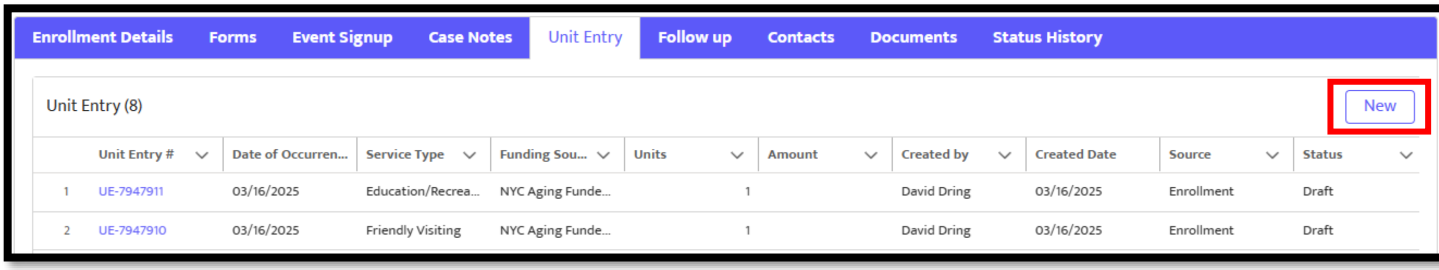
Enrollment units are specific to your programs and services. From the **Enrollment Details Menu** you are entering units specific to your client.

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.

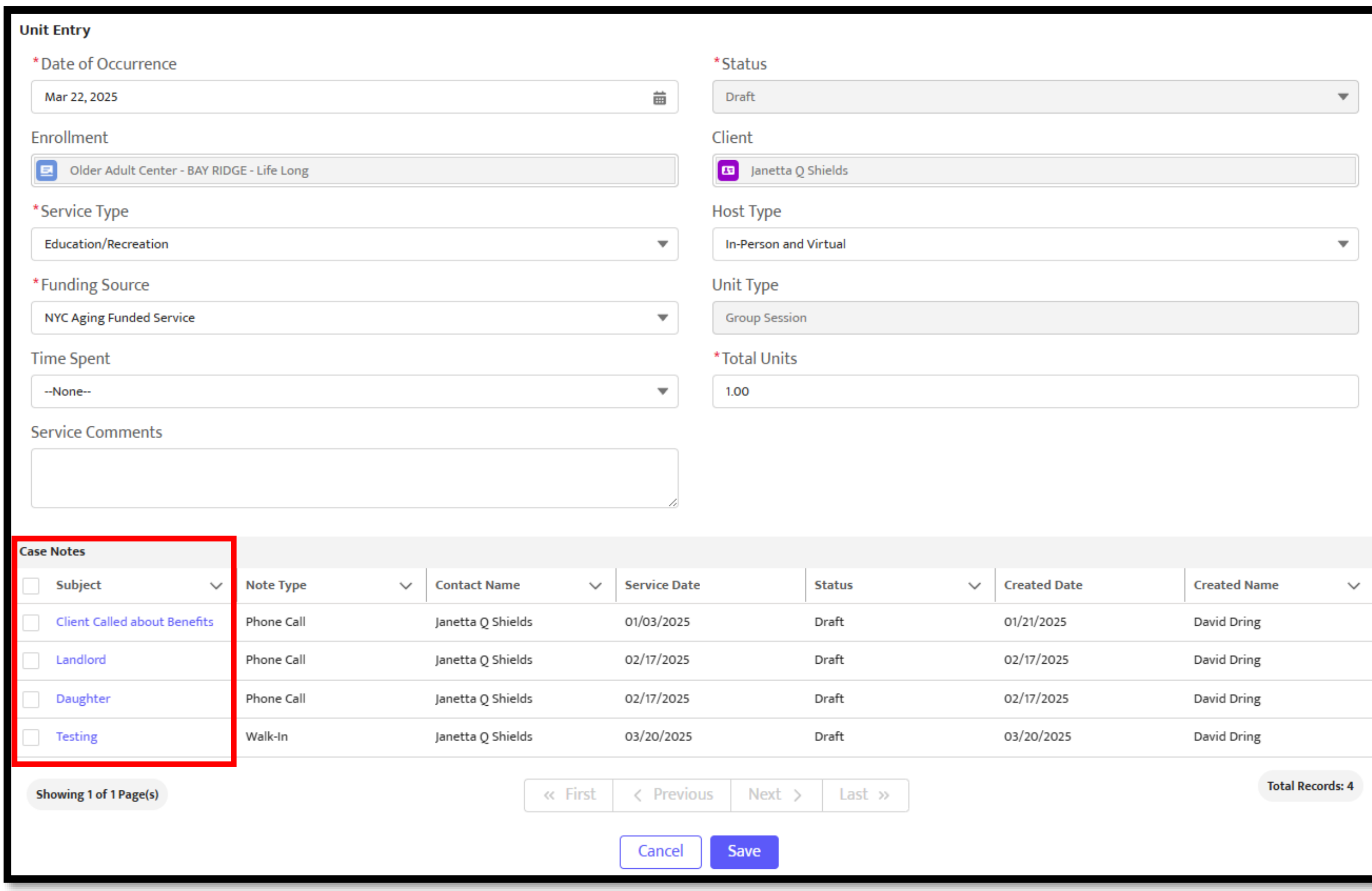
Step 4: Select the **New** button.



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

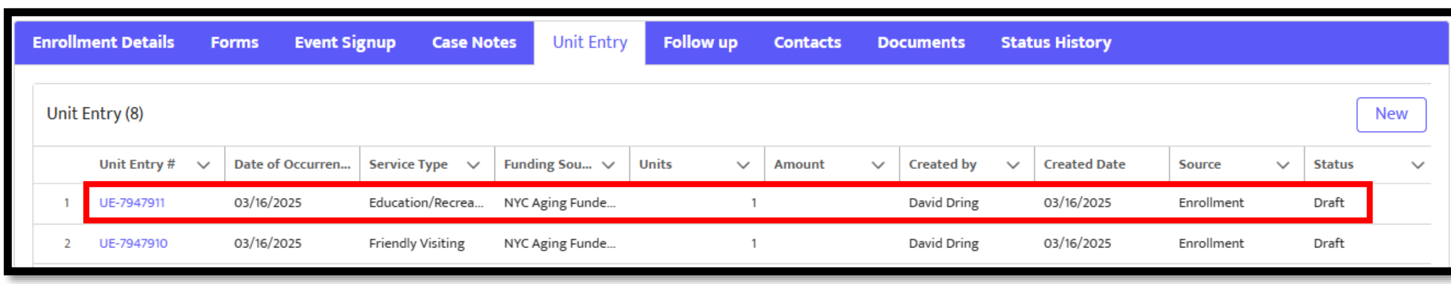
From the **Enrollment Details Menu** you are editing units specific to your client. You can only edit draft units. When units are finalized on the Monthly Unit Summary, all unit entry fields will be locked and can no longer be edited. . To unlock the Monthly Unit Summary after it has been finalized,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

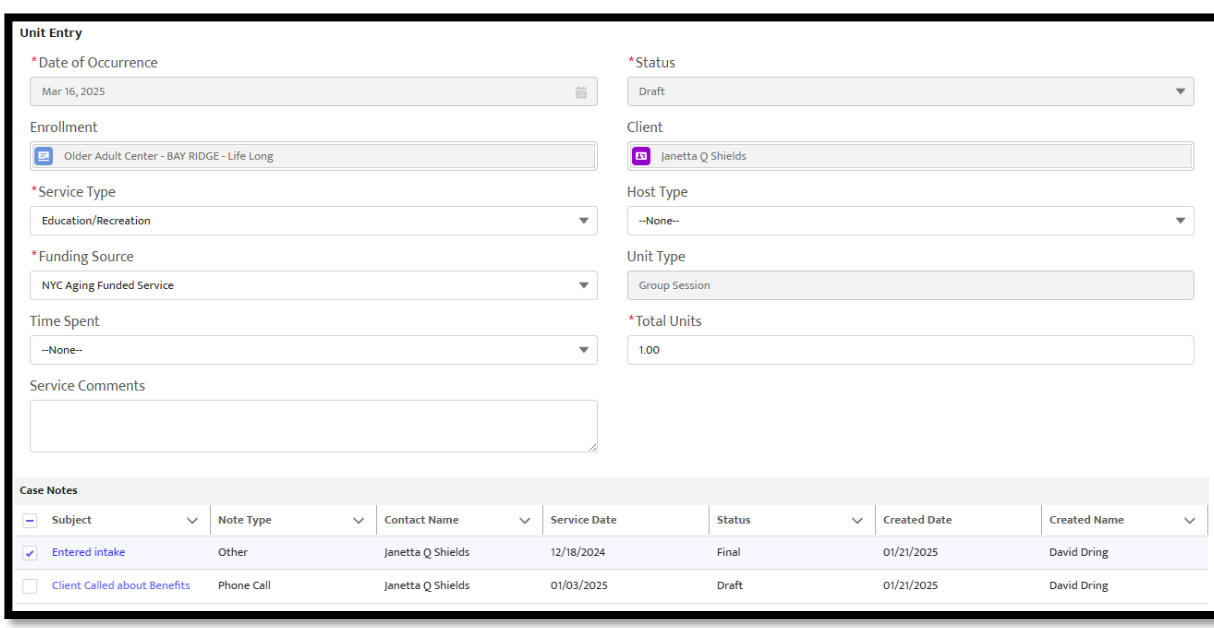
Step 3: From the **Enrollment Details Menu**, click the **Unit Entry** tab. Depending upon your window's width, you may have to select More to access Unit Entry from that dropdown menu.

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.



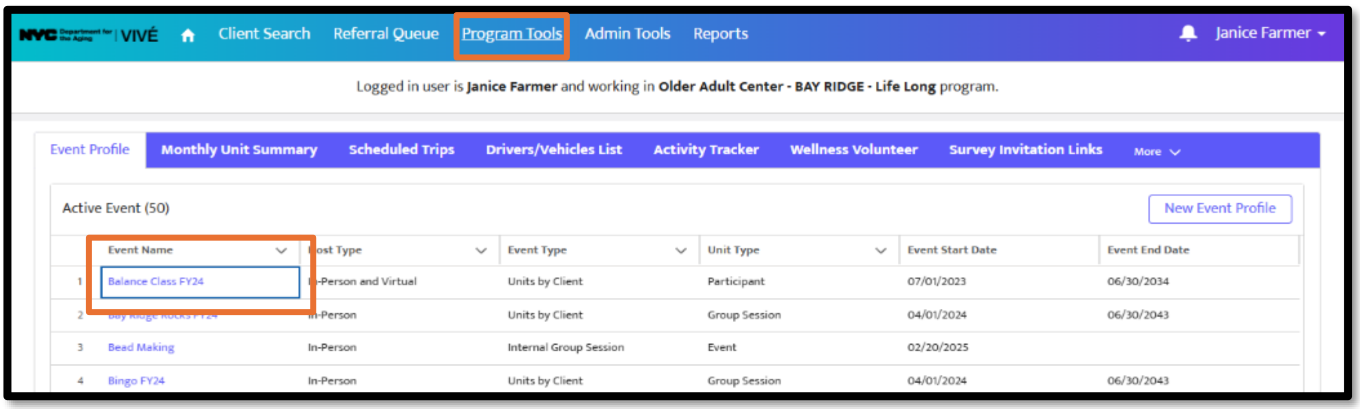
Entering Units from Program Tools

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.

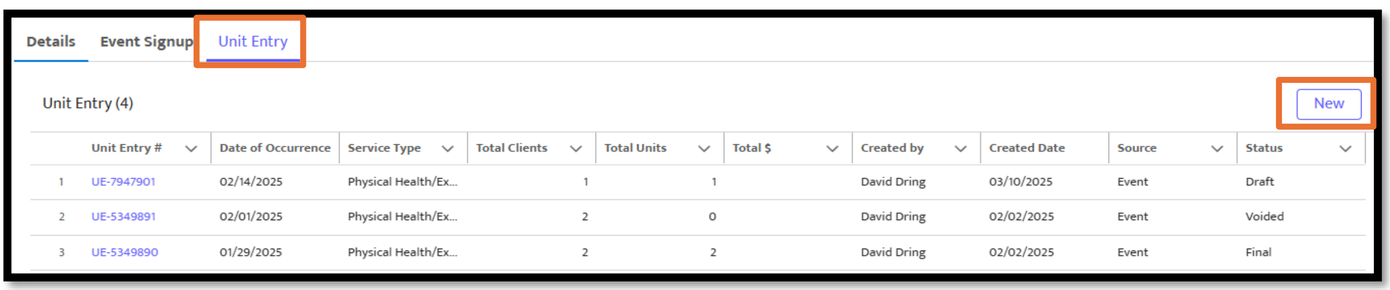
Step 1: From the **Top Menu**, click **Program Tools**.

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.



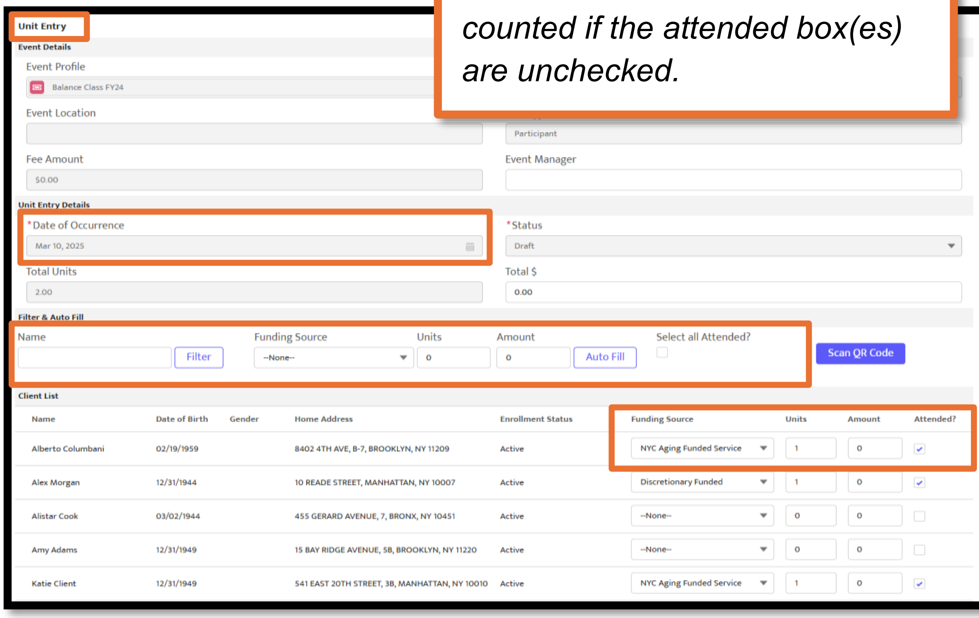
Step 5: From the **Unit Entry** Details page, add the date the event occurred. This can be backdated.

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.

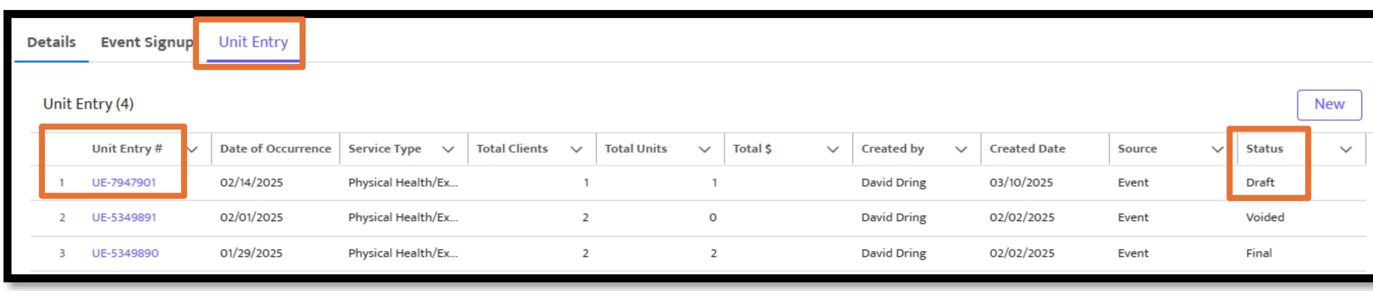
- Enter Funding Source, Units and Amount (optional) then select **Auto Fill**. Also, check the Select all Attended to mark each attended box.
- Enter the Funding Source, Units, Amount (optional) and check the attended box for each client.

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.



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

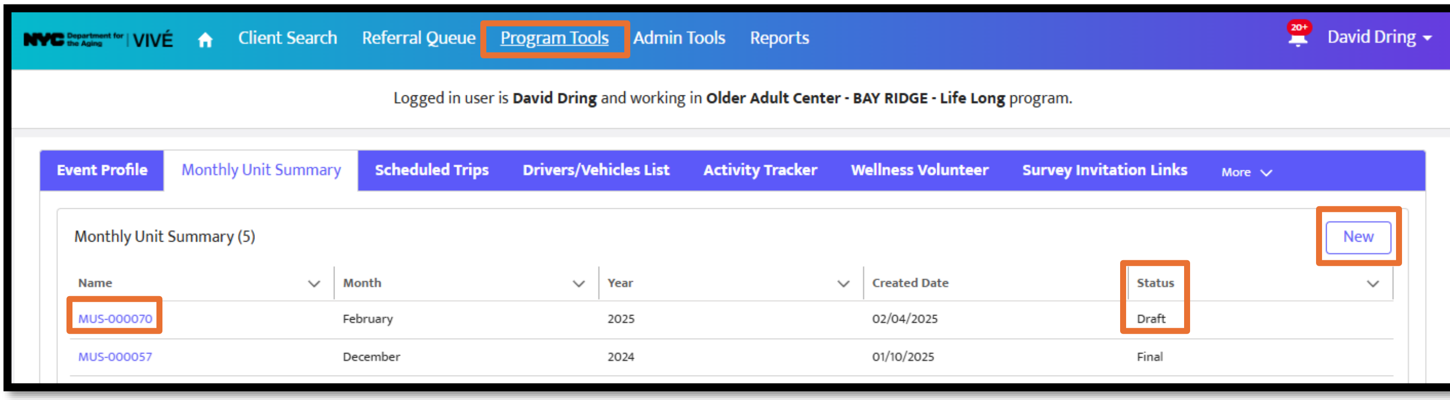
The process of voiding a unit is similar for all three pathways to unit entry. However, units can only be voided if they are in the draft status. Once a Monthly Unit Summary is finalized units cannot be voided. At the bottom of each Unit Entry details page, is a **Void Unit** button. Select it and the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

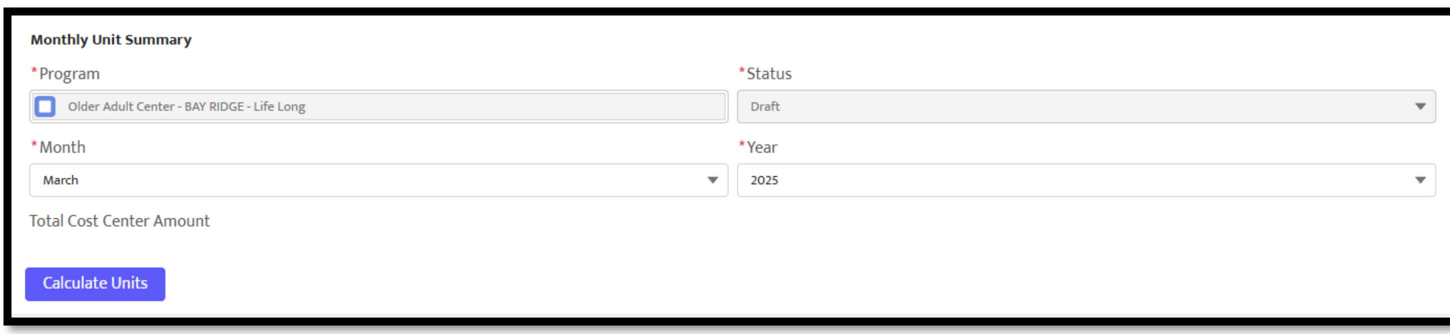
The Monthly Unit Summary reports the summary of units recorded in a month. Once you have confirmed these amounts, then you must finalize the report. ***Once a report is finalized, units can no longer be entered or edited. If you need to unlock a Monthly Unit Summary, contact your program officer.***

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 VIVÉ Knowledge Base

The VIVÉ Client Profile Reference Guide

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

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

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

In this guide you will learn:

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

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

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

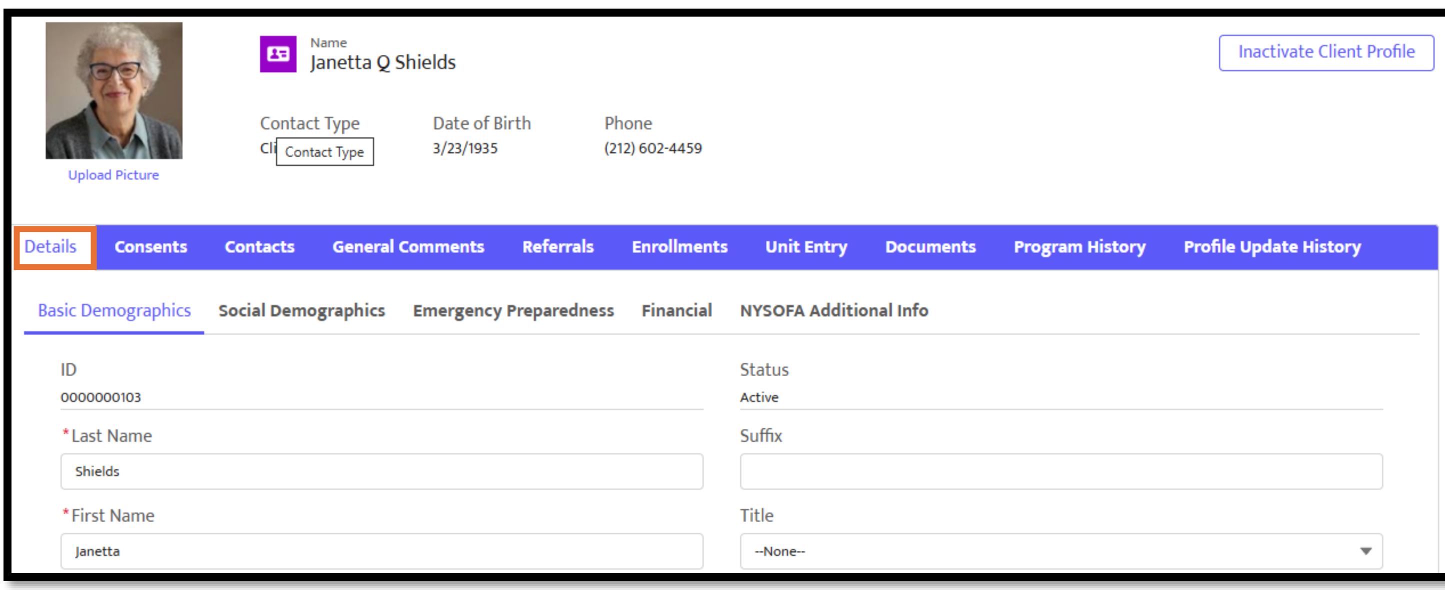
Client Profile Overview

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.

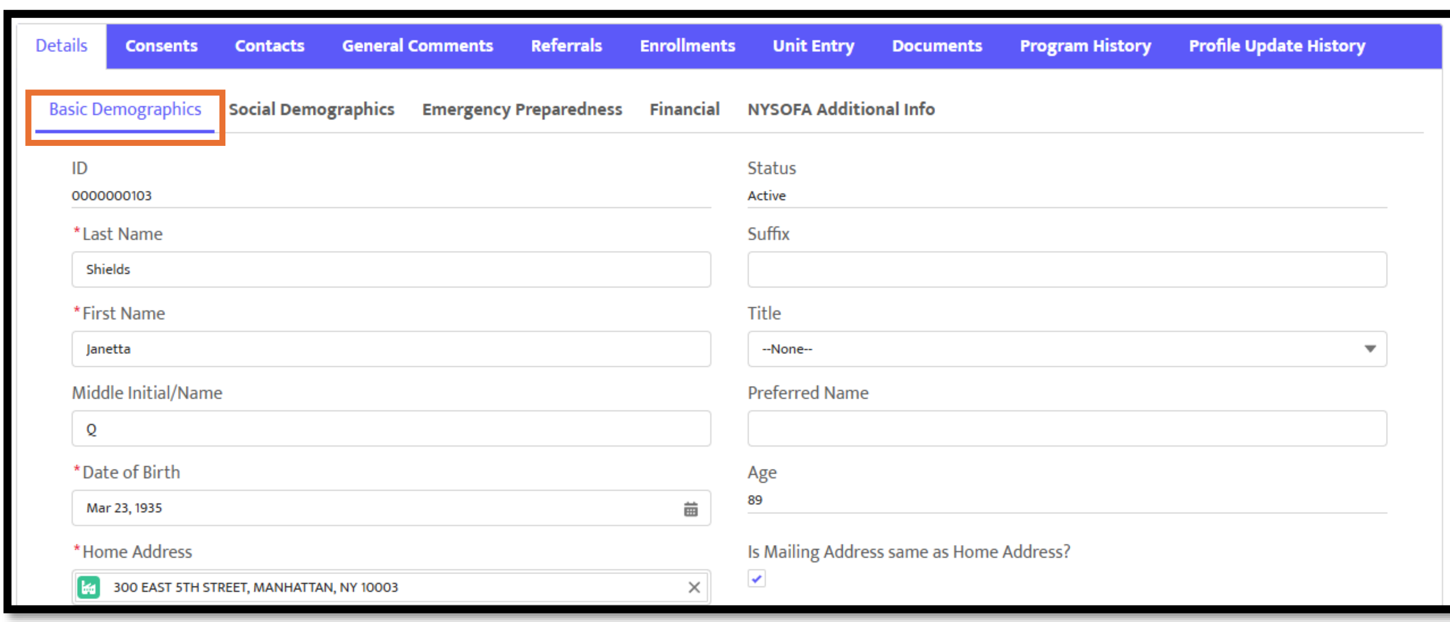
- General Comments – a place to make general comments; these are not case notes.
- Referrals – where to view and make client referrals.
- Enrollments – where to enroll a client into your program, view active and inactive enrollments and manage the client's engagement with your program.
- Unit Entry – 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.

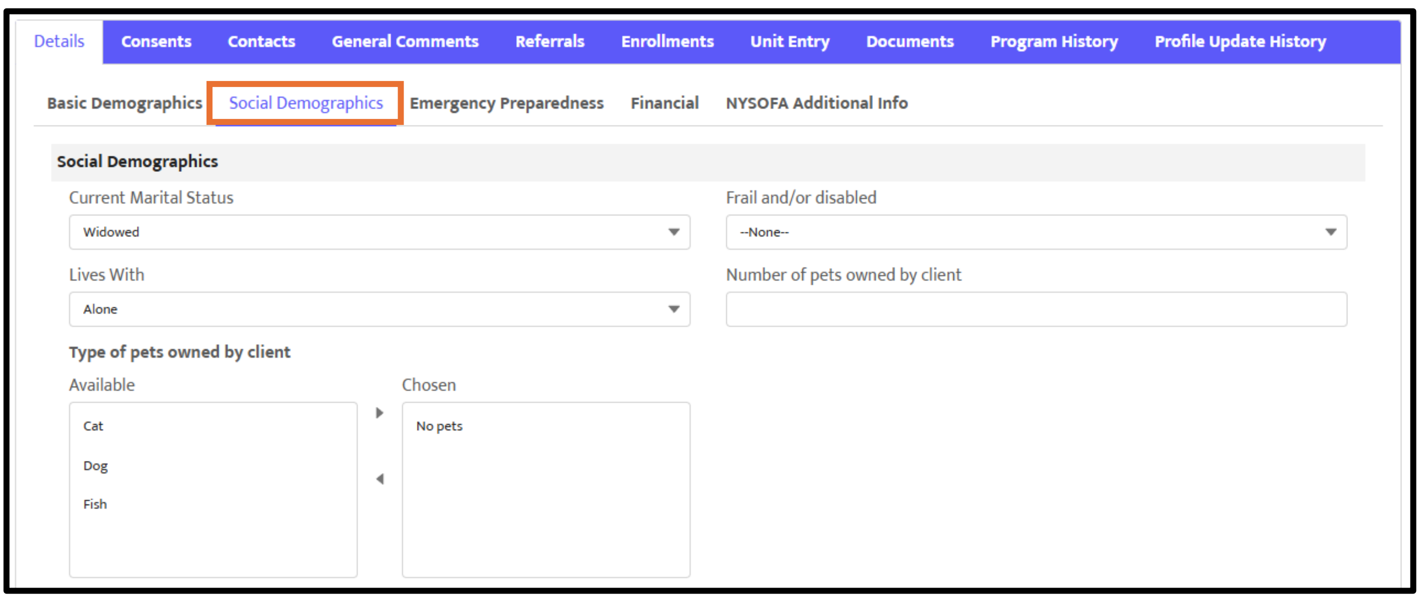


At the bottom of the **Basic Demographics** page there is the **Edit** button (or **Save** if in editing mode) and the **QR Code**. (For more information on QR Codes)

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

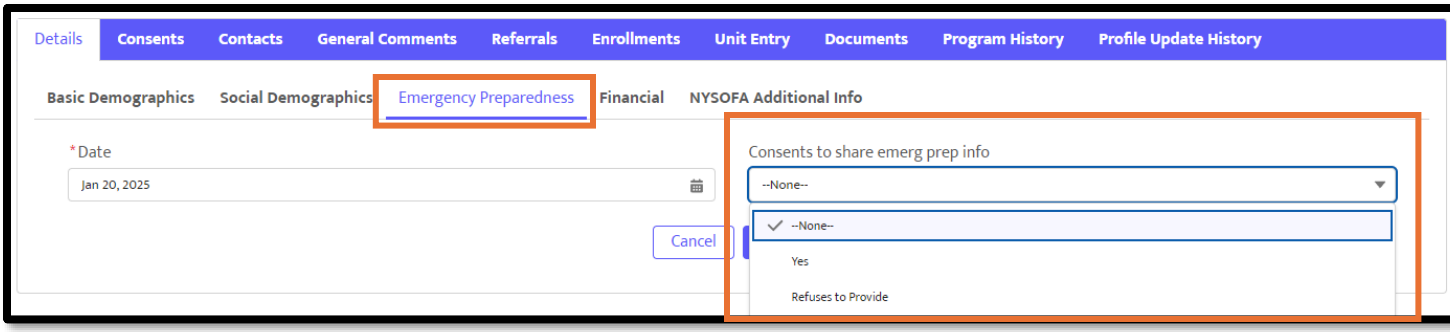
Sub-Details: Social Demographics

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.



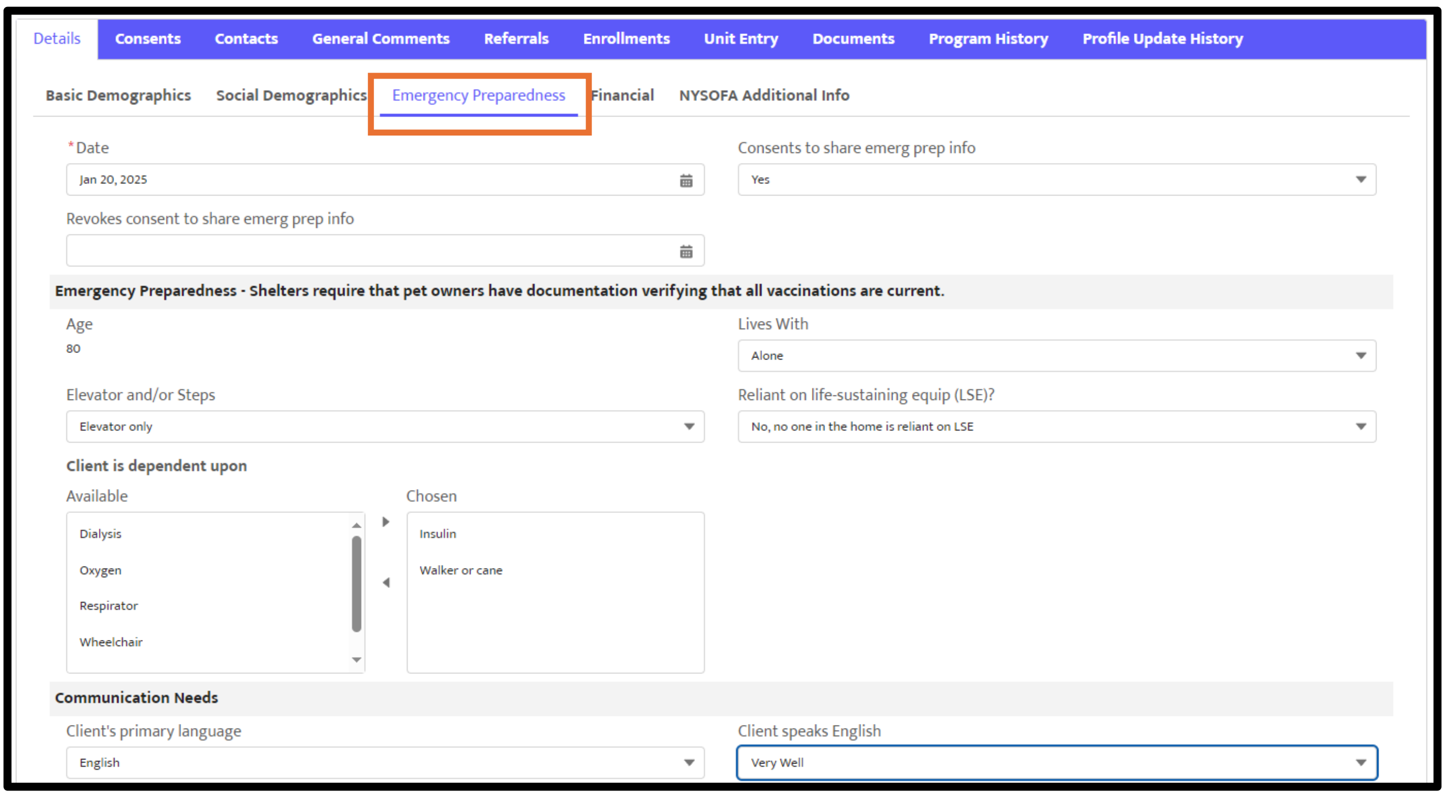
Sub-Details: Emergency Preparedness

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.

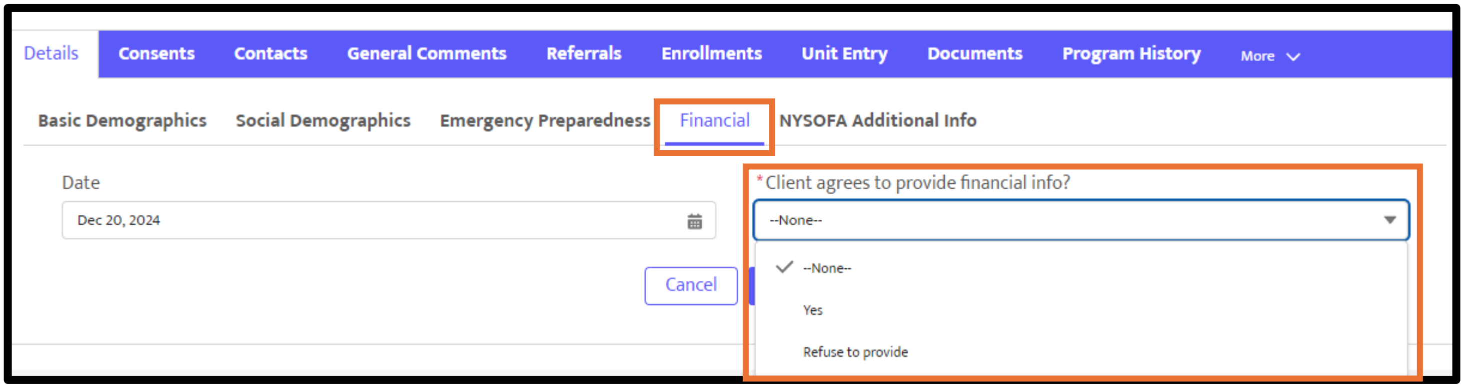
There are several different types of data entry field types. Some are calendar pick lists, dropdown menus, as well as the option to select and move one or more items from the Available box to the Chosen box. Once finished, select the **Save** button at the bottom of the page.



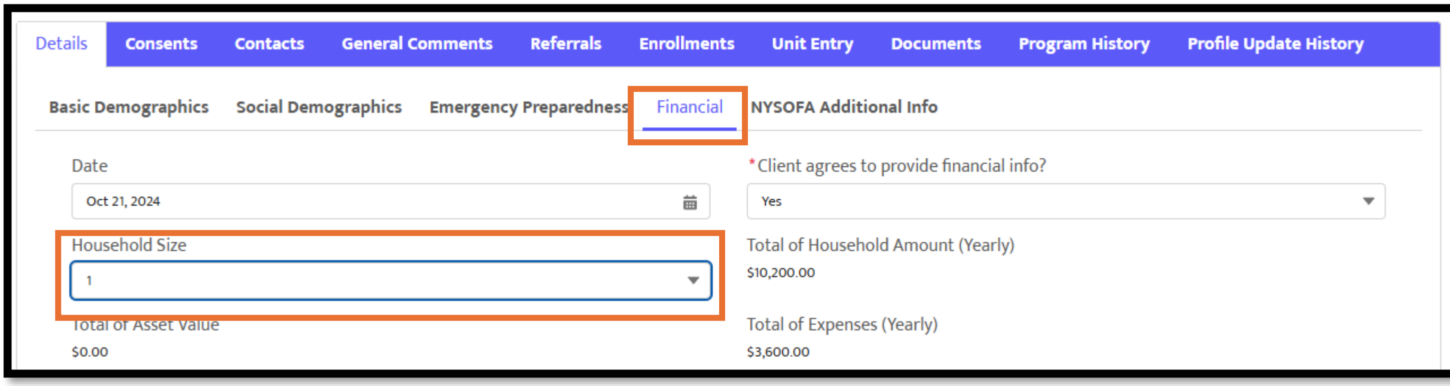
Sub-Details: Financial

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.

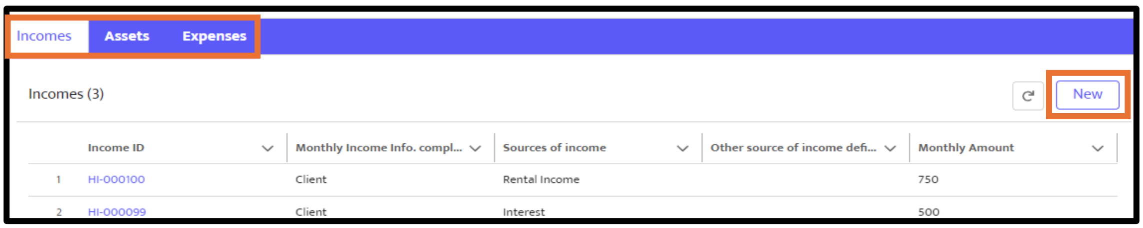
If the client agrees to provide financial information, select the **Edit** button to review the options in the drop-down menu. Select "Yes" client agrees and then select the **Save** button.



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.

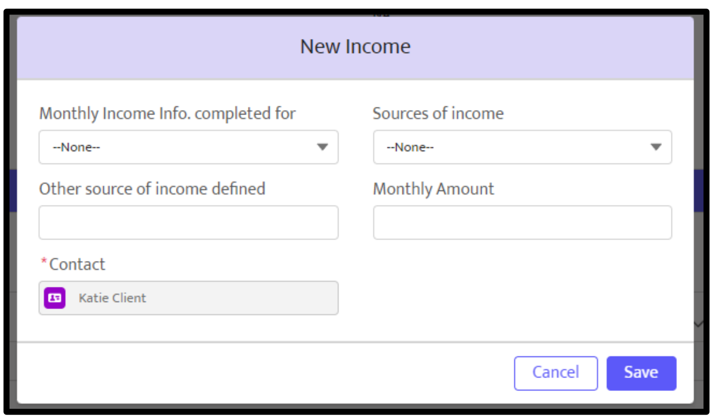


At the bottom of the page, there are three tabs: Income, Assets, and Expenses.



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**.

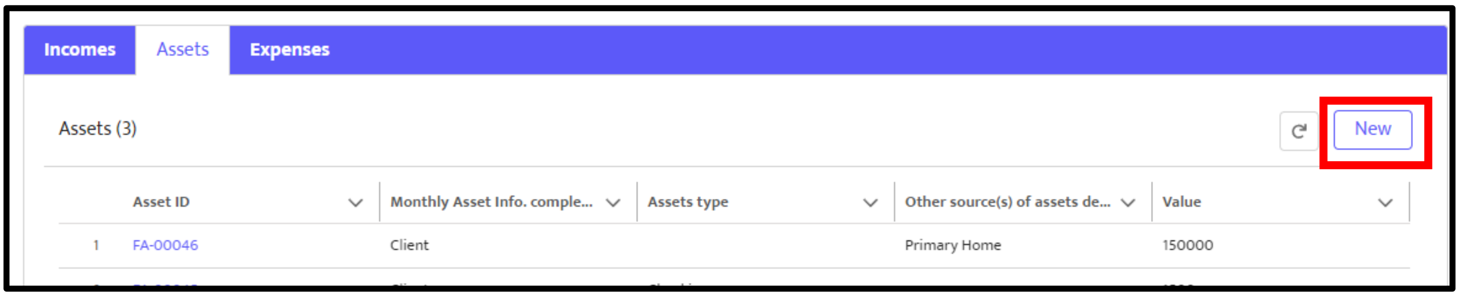
At the top of the page, there is a summary of the household size, total annual income, total assets and total expenses. If you want to see the Poverty Levels chart, click the hyperlink underneath the **Poverty Level PDF** label.

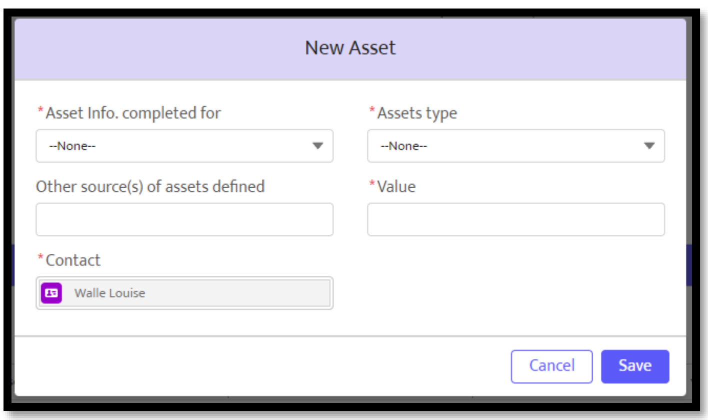
To edit any of these details, click the **Income** tab then select the link for a source of income. That brings you to the details for that income source, those details can be edited by clicking any of the pencils. Select **Save** when finished and **Exit** to return to the top of the page.

***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.



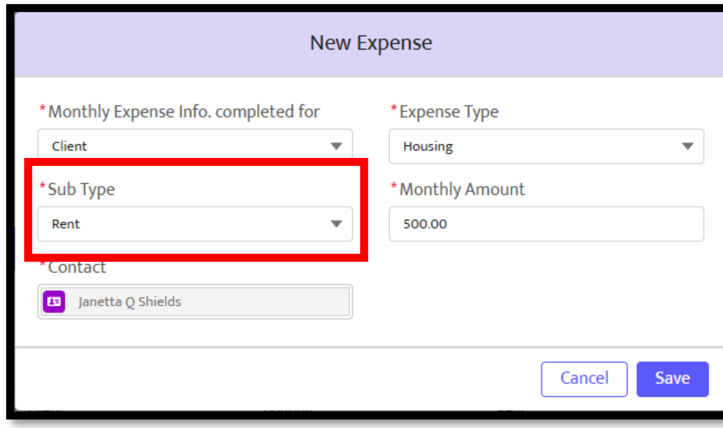


The **New Asset** pop-up identifies the owner of the asset, its type and value.

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.

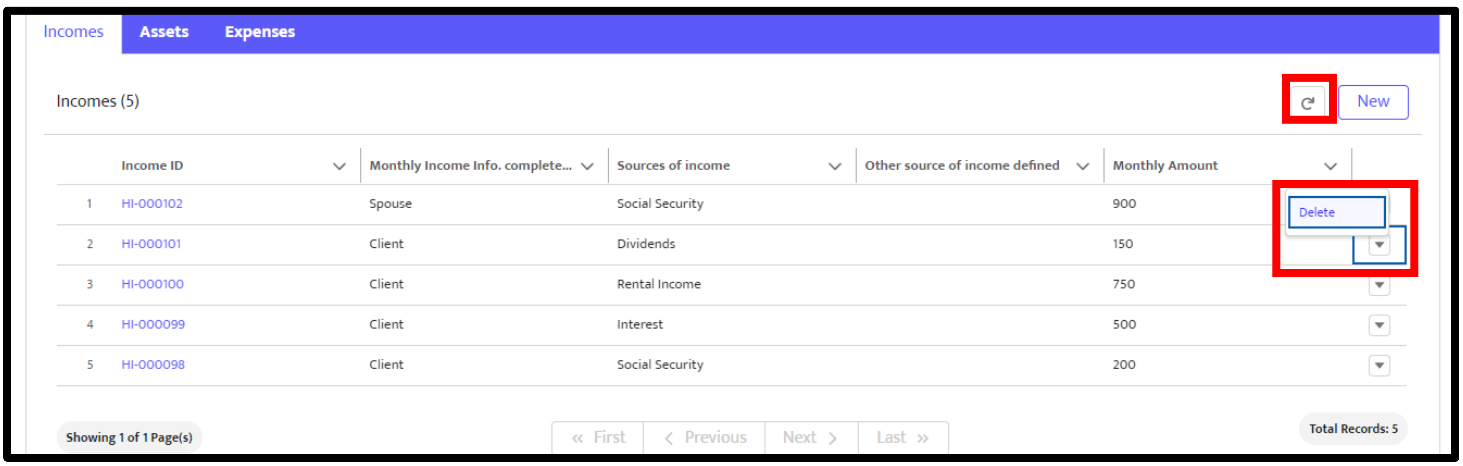
To Enter Expenses

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.



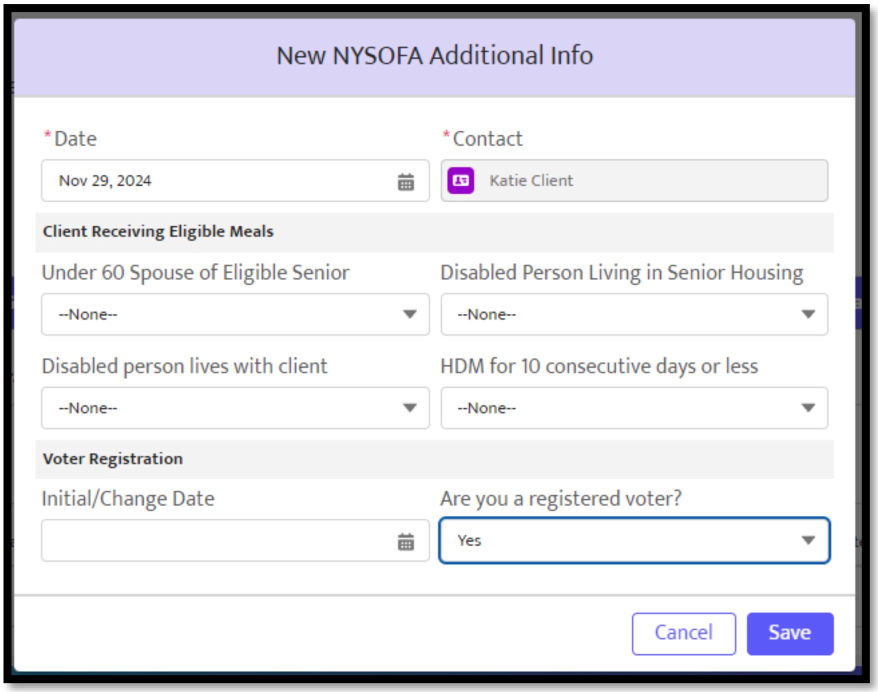
To Delete Financial Information

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.



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.

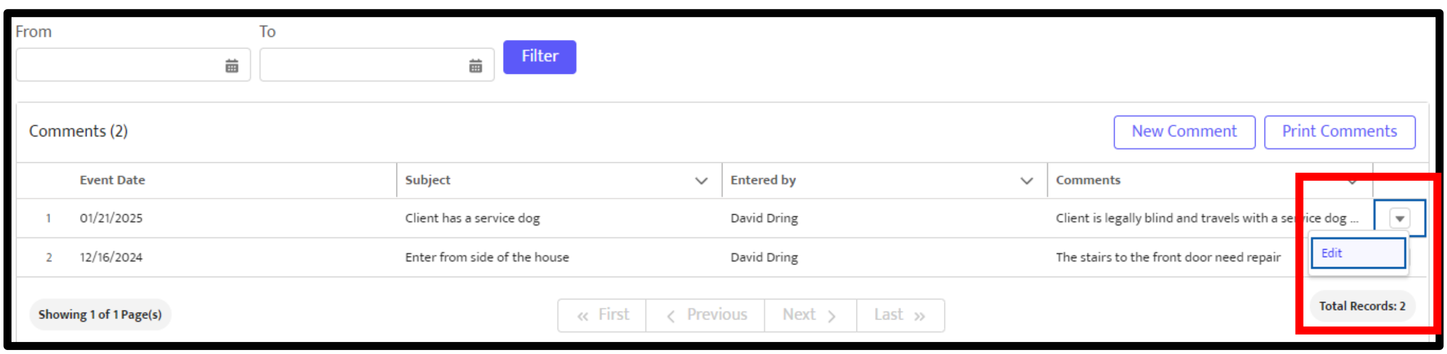
- If you need to edit previously entered **NYSOFA** Information, click the hyperlink in the ID column to open the **NYSOFA** screen, select the **Edit** button to make the changes. When you are finished making your edits, select the **Save** button.

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.

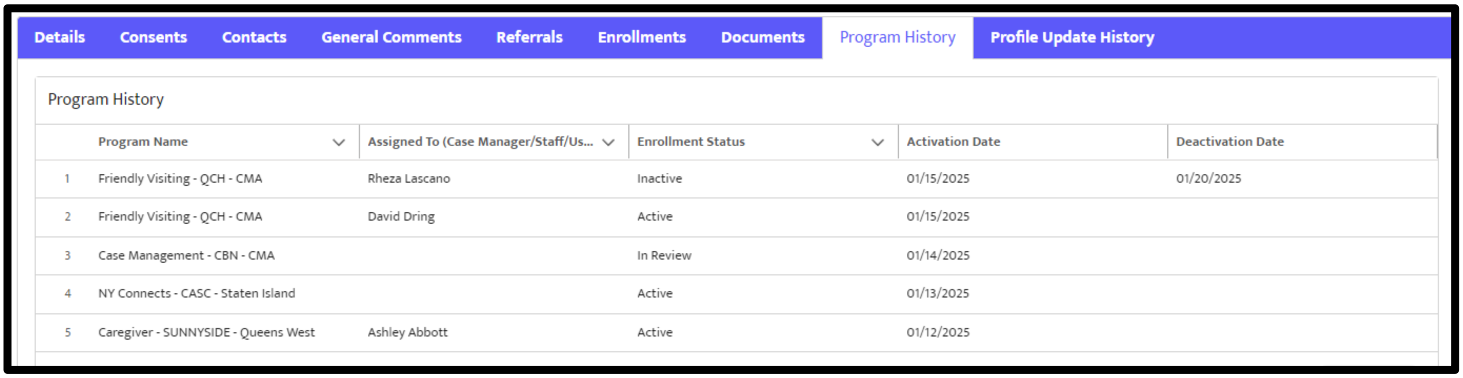
***NOTE**: General Comments are* accessible to all users that have consent to view the client's information.

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

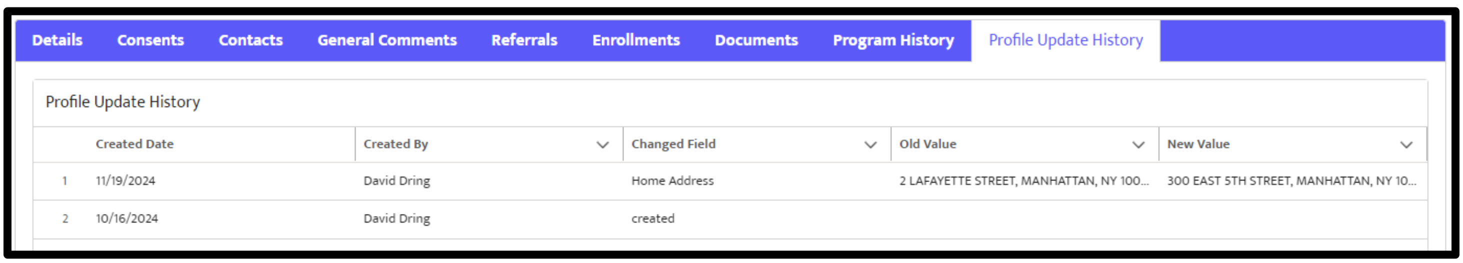
The **Program History** tab is the place in VIVÉ where you can see all of the client's enrollments, and their enrollment status, with the exception of **DGMH**, Elder Crime, **Elder Justice** and **Legal Services** due to the sensitive nature of these programs.



	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).



	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		

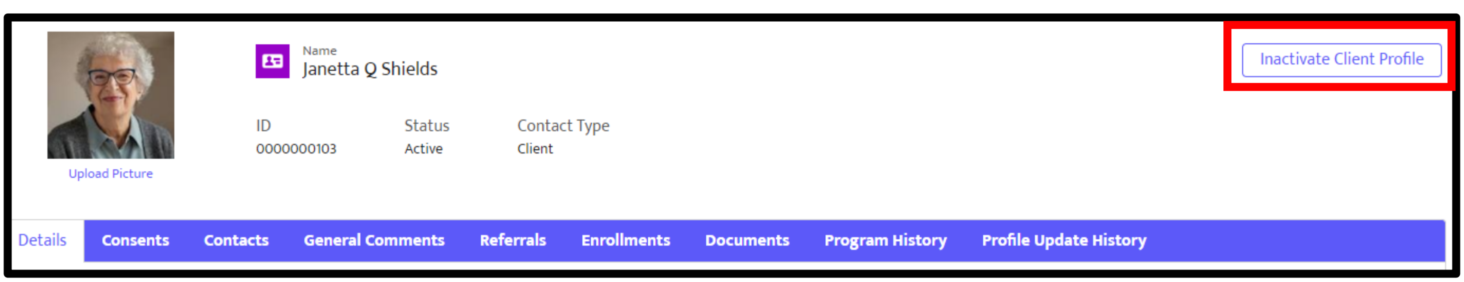
Inactivating a Client

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:

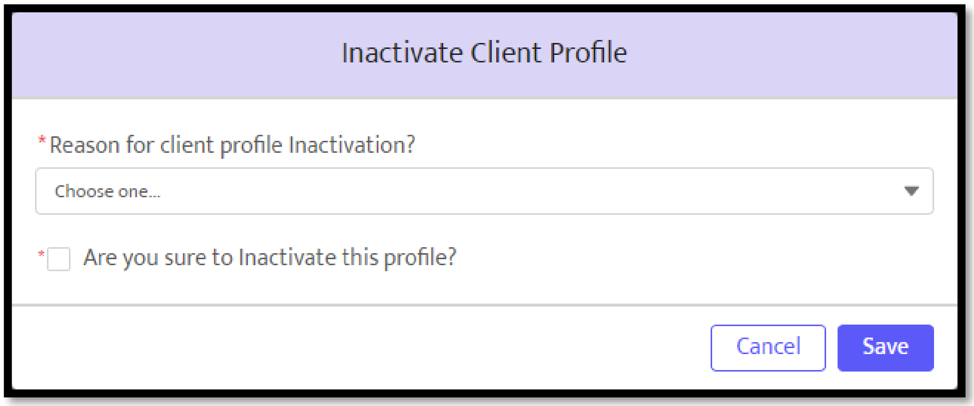
Step 1: Select the Inactivate Client Profile button at the top right of your screen.



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.



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:

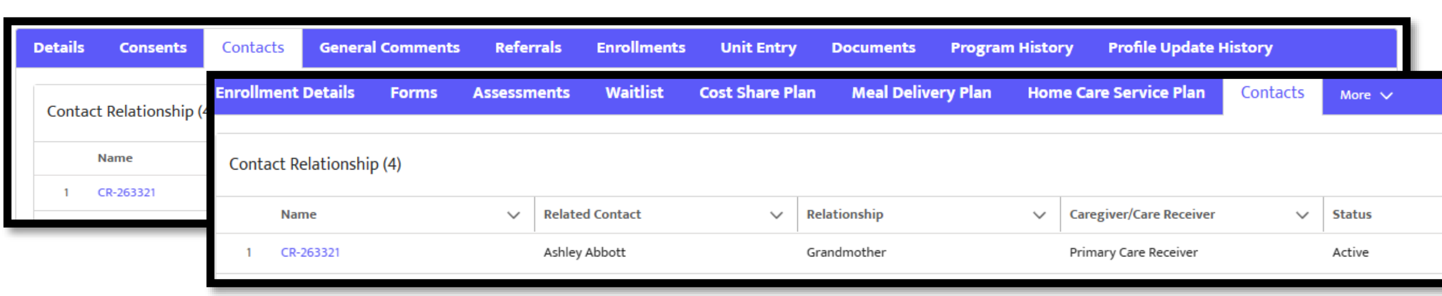
- **Client**: A person who is or has been enrolled in at least one NYC Aging program.
- **Contact**: A trusted person known to the client but not enrolled in an NYC Aging program.
- **Professional**: A service provider for the client, such as a doctor, pharmacy, or other professional.

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

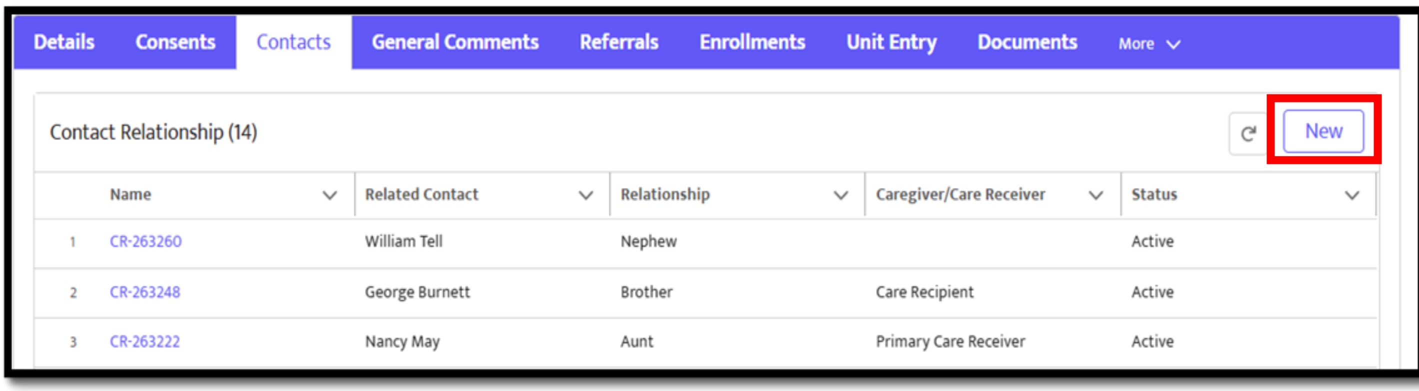
As there are three types of contacts, there are three pathways to associate them with your client. However, each of these pathways start the same way: searching for an existing contact.

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.

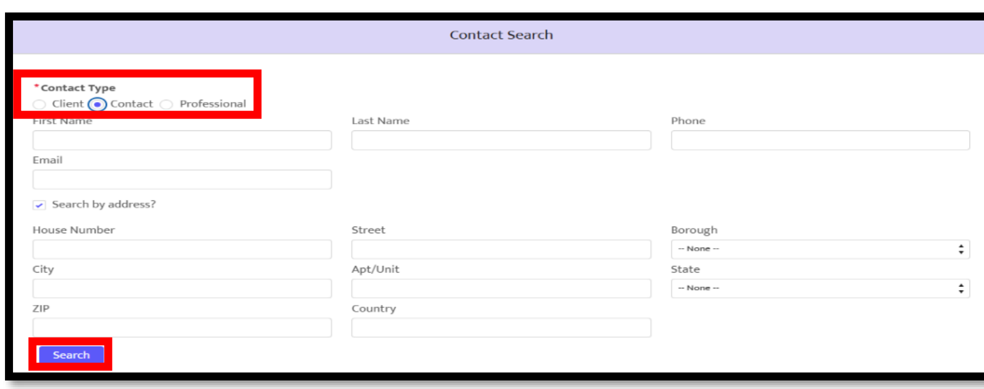
Step 1: From the **Top Menu**, click **Client Search**, click the desired client's name. Then, click the **Contacts** tab.

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



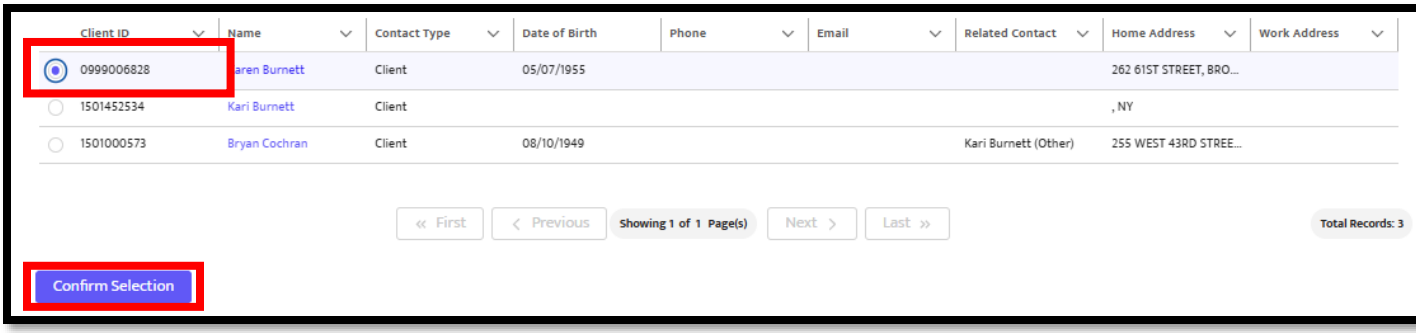
Step 3: Search to either find a match or confirm there isn't one to begin entering a new contact.

- 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.).

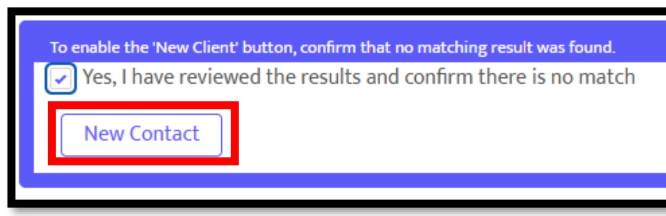


- To include a search by address, check the **Search by Address** box and enter the address.
- Select the **Search** button once all relevant information is entered.

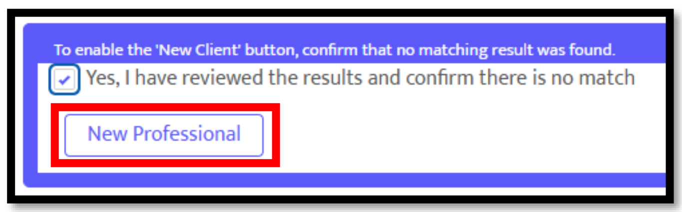
The search results for each type share the same selection process. There is a radio button to the left of an existing contact. Check that then select the **Confirm Selection** button to associate that person with your client. See below for more details on how existing contacts are associated with your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



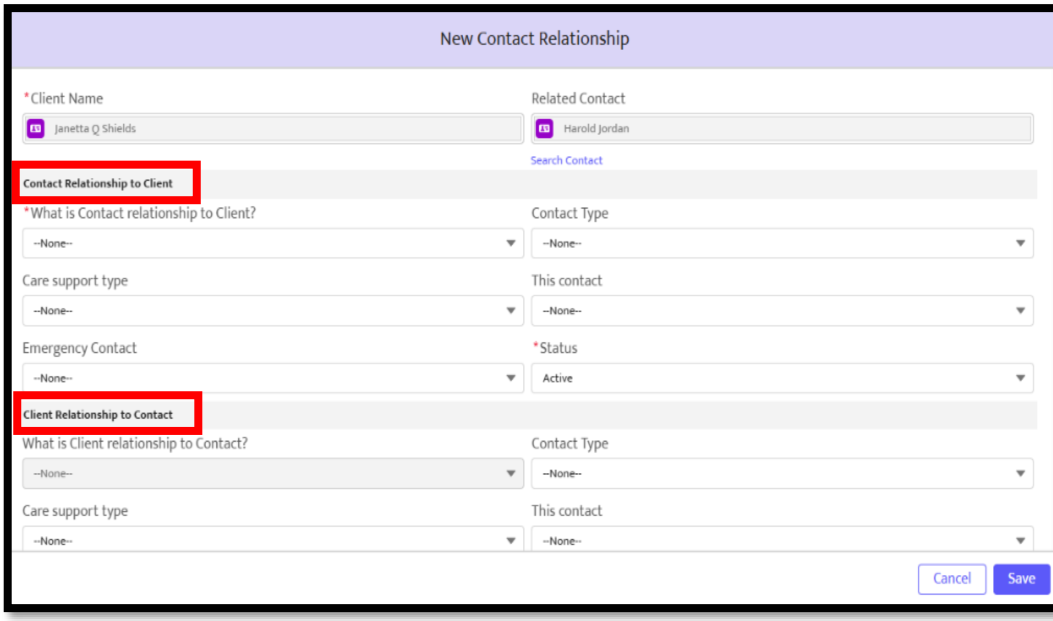
NOTE: *If the contact is not found via a Client type search, then proceed to searching the other types. You can search for only one type of contact at a time. Also, you are not able to enter a new client via Contacts.*

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.



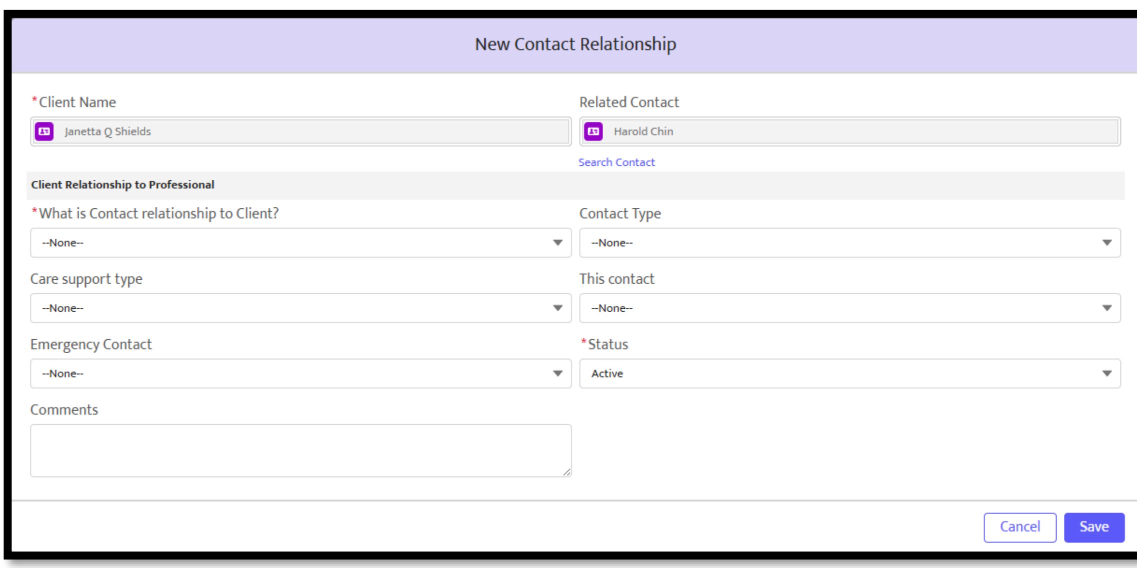
NOTE: *When you add a Client as a contact for another client, the relationship is reciprocal—the added client will also have the original client listed as their contact*.

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.

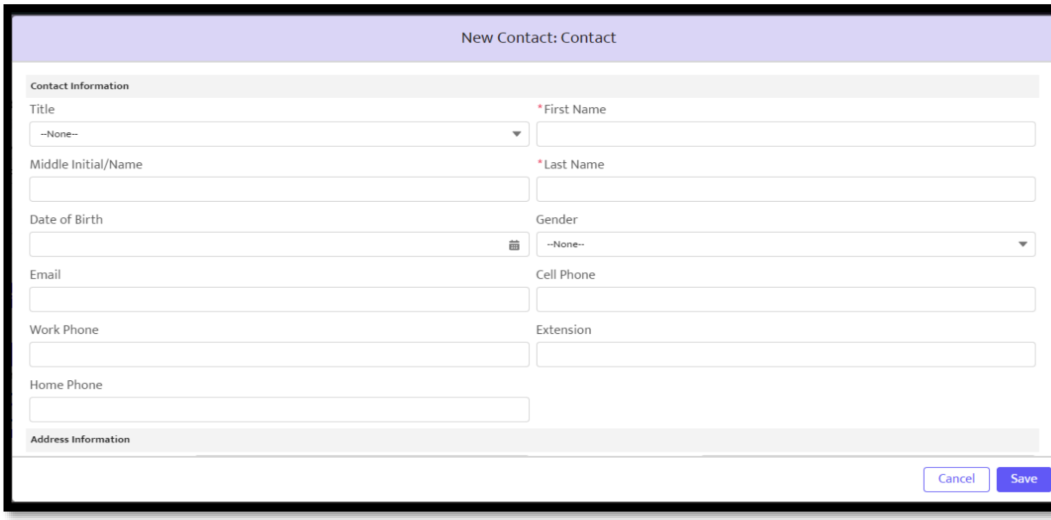


Entering in New Contacts

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.

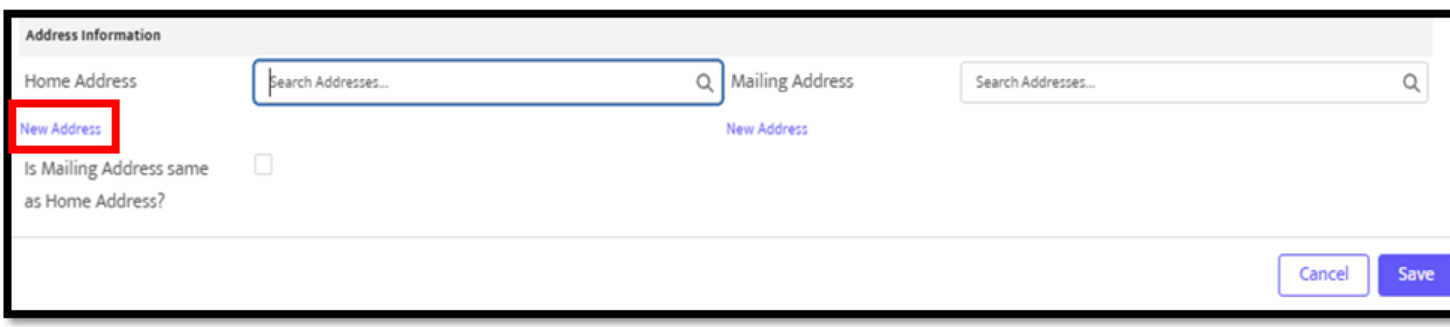
Step 1: After confirming no matches and selecting the New Contact button, complete the New Contact: Contact pop-up.



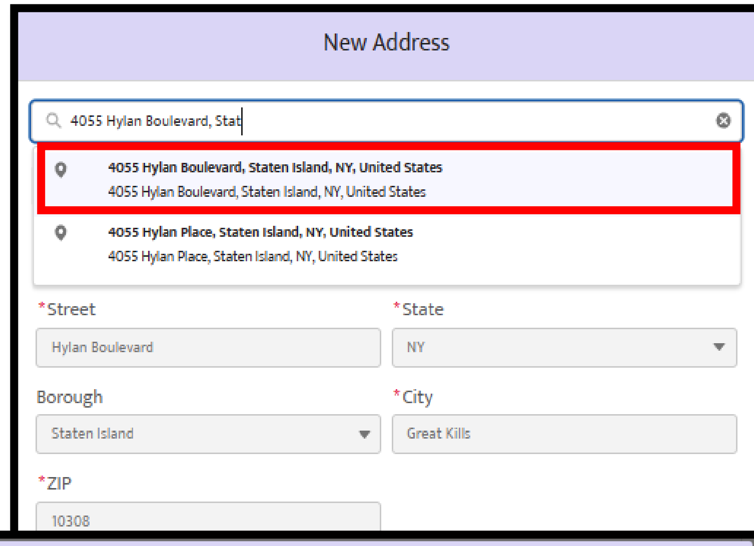
Step 2: While not required, it's best practice to always enter a phone number and an email address.

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**.

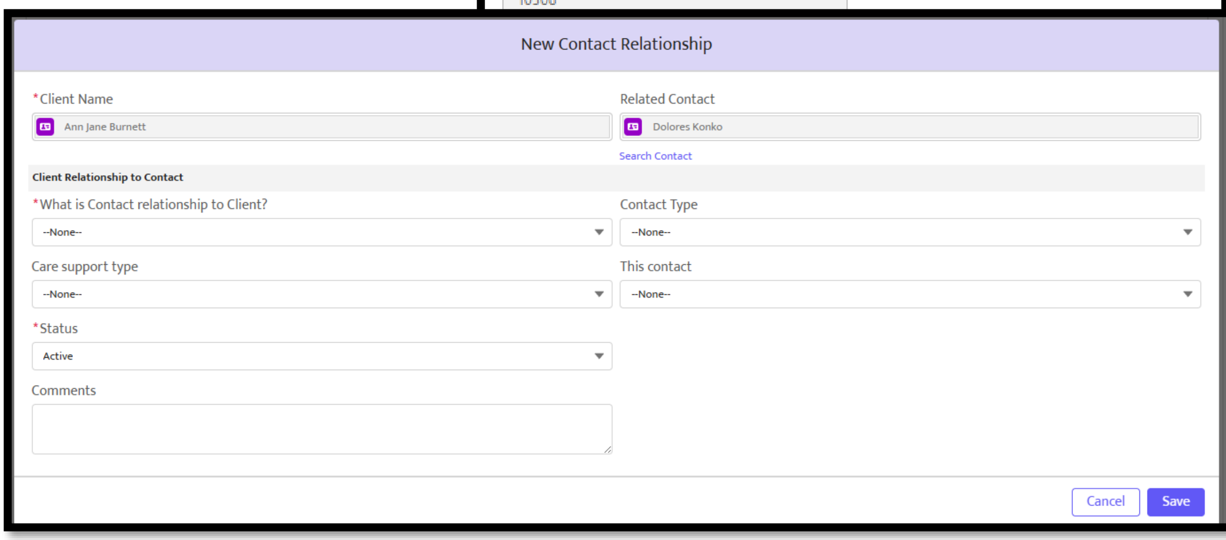


Step 5: When entering a new address, the type-ahead technology speeds finding address. Once you've found it, click on it and the details will autofill the fields. Review the entry to be sure all information is included, especially apartment information.



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.

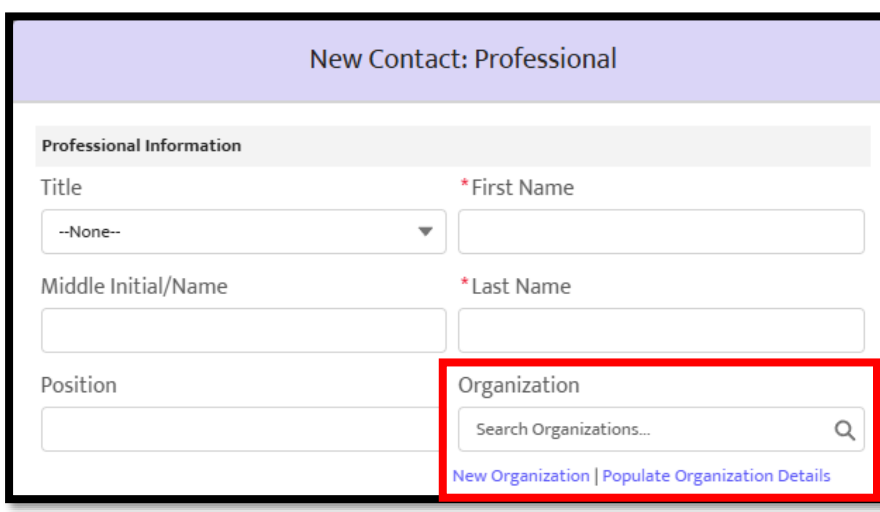


Entering a New Professional Contact

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.

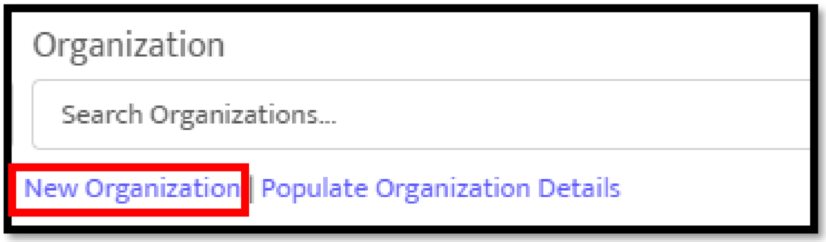


Step 3: Use the type-ahead technology to find organizations previously entered or click on **New Organization**.

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

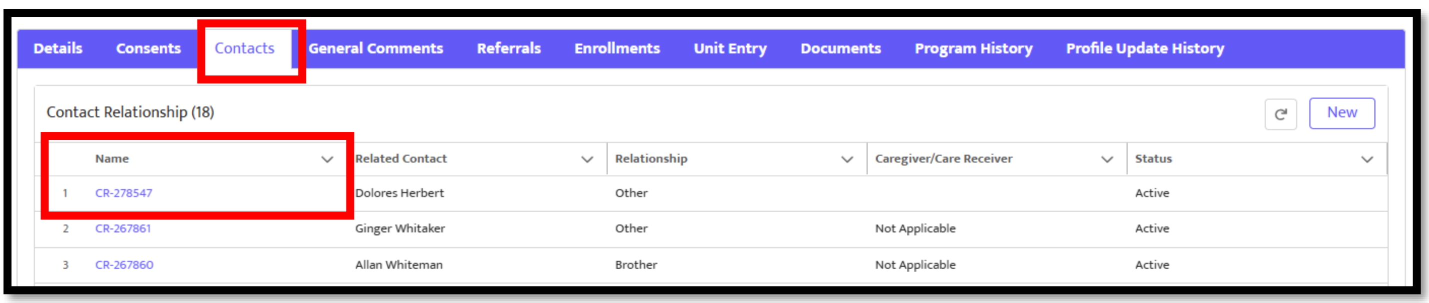
Enter a New Organization

- 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.

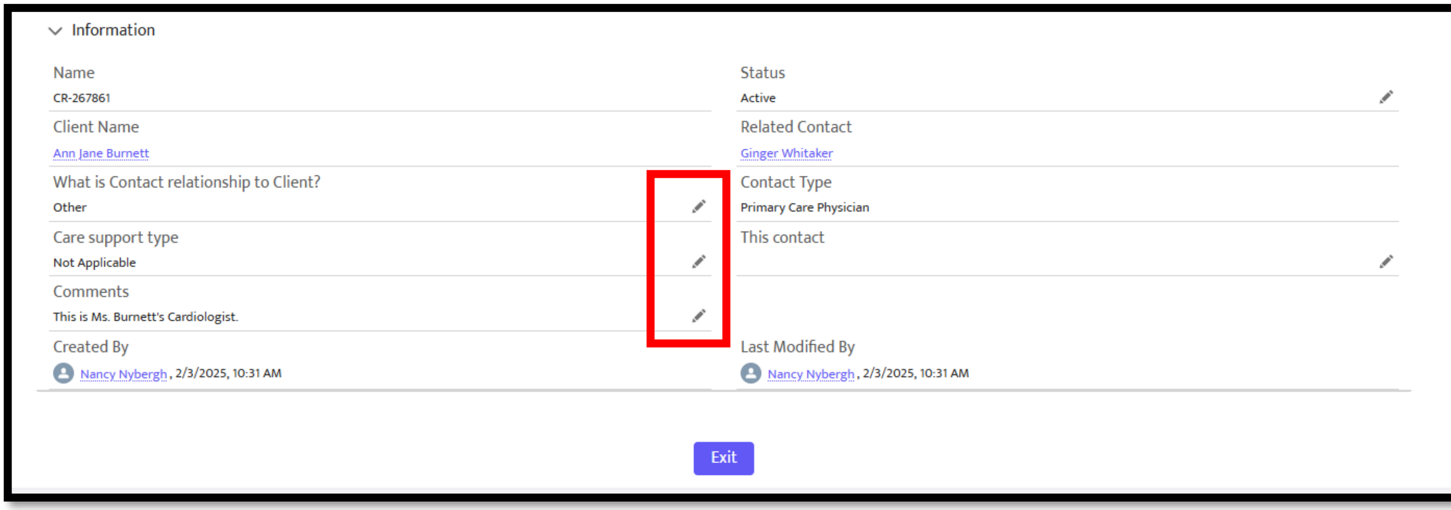


Editing Contacts

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.*

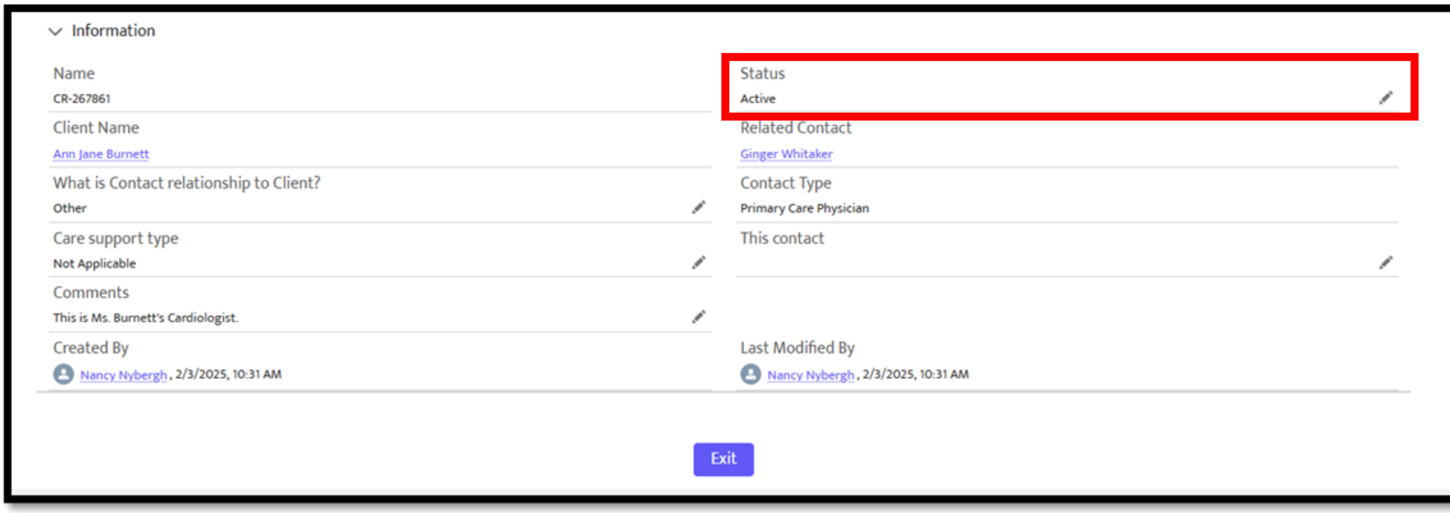
Inactivating Contacts

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:

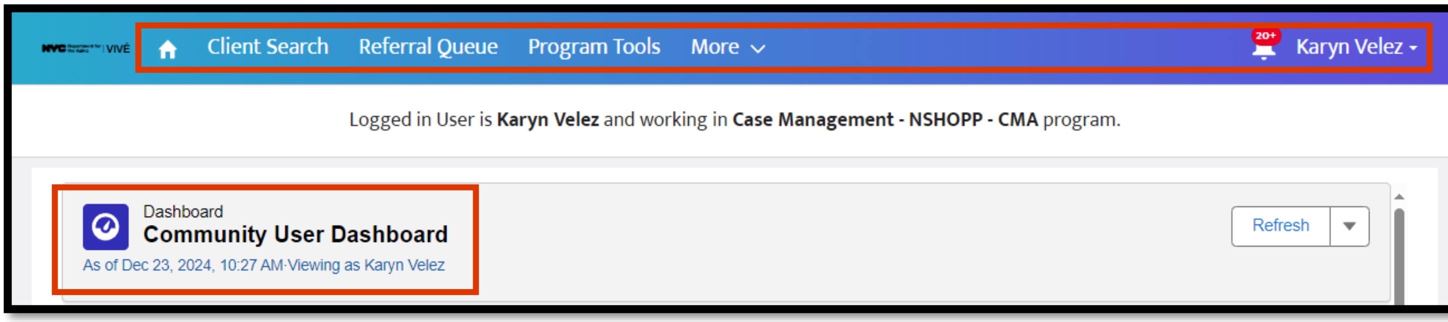
- **A Dashboard Overview**
  - The Top Menu Navigation
    - ☐ Notifications
    - ☐ User Name Profile
    - ☐ Refresh Button
- **My Enrollments**
  - Accessing the Client Profile
  - Accessing Enrollment Menu
- **My Follow-Ups**
  - Accessing the Follow-Up Request Screen
- **My Tasks**
  - Accessing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

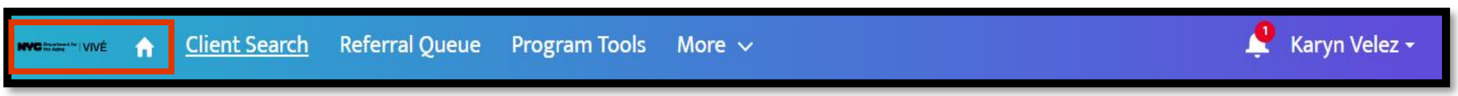
The **Dashboard** will be the first page to appear once you have logged into VIVÉ. Below are details of key navigational elements and details of their features.



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.

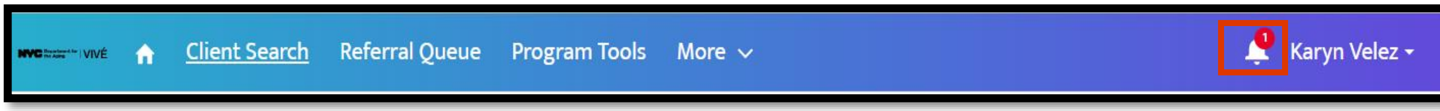


These are the critical links from the **Top Menu**:

- 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.

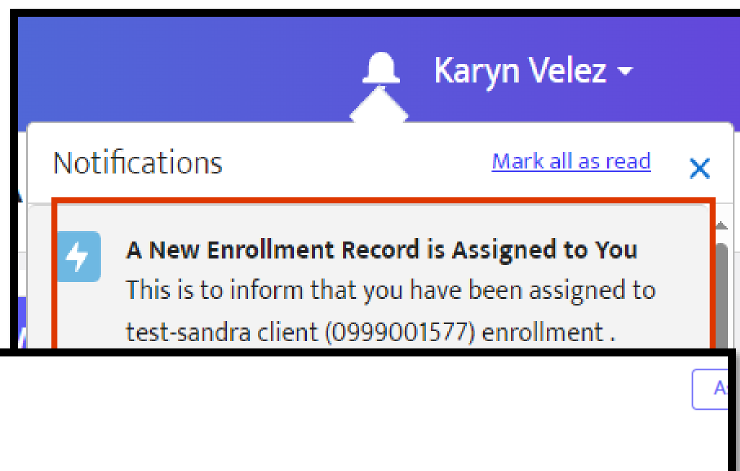


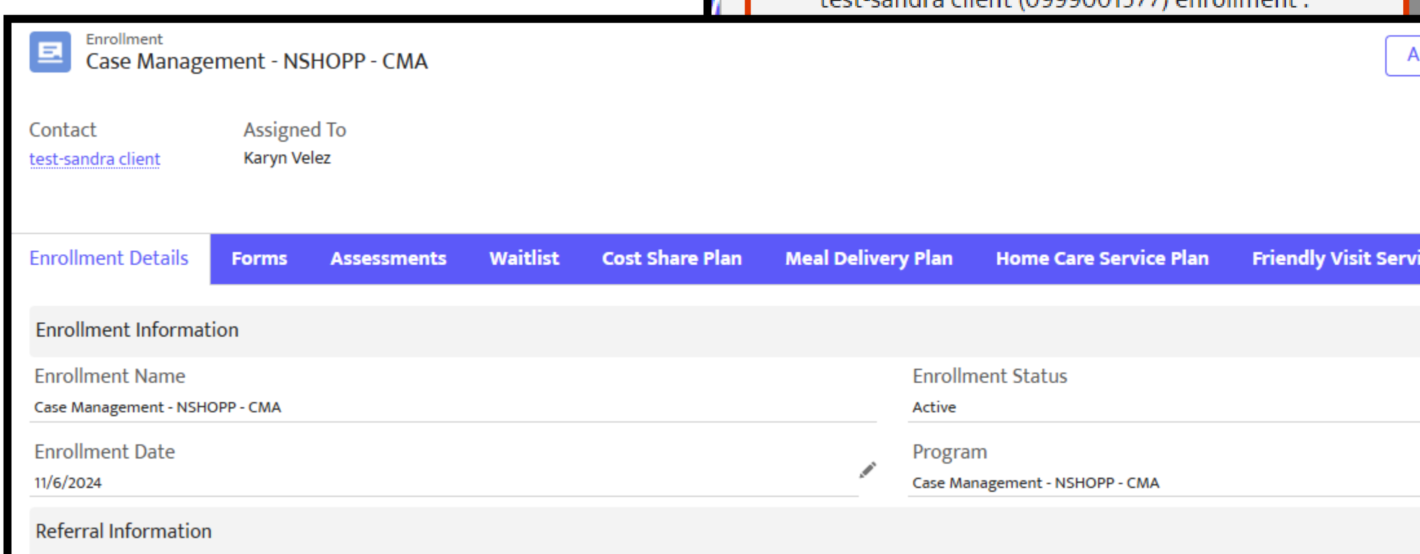
To view and access **Notifications**:

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.



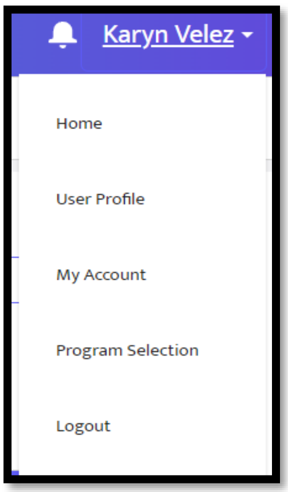


Notifications are ordered so that the most recent one appears at the top of the list. If you want to view others, scroll down.

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:



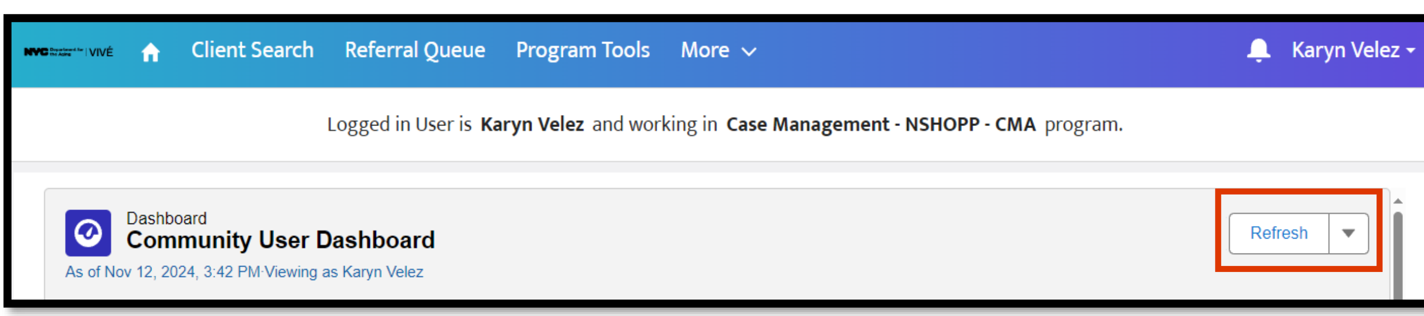
- **Home** – This functionality is used to bring you back to the **Dashboard** from any screen page in VIVÉ.
- **User Profile** – This functionality provides access to information about you including your 1) title, 2) supervisor's name, 3) email address, 4) company name, telephone number and address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

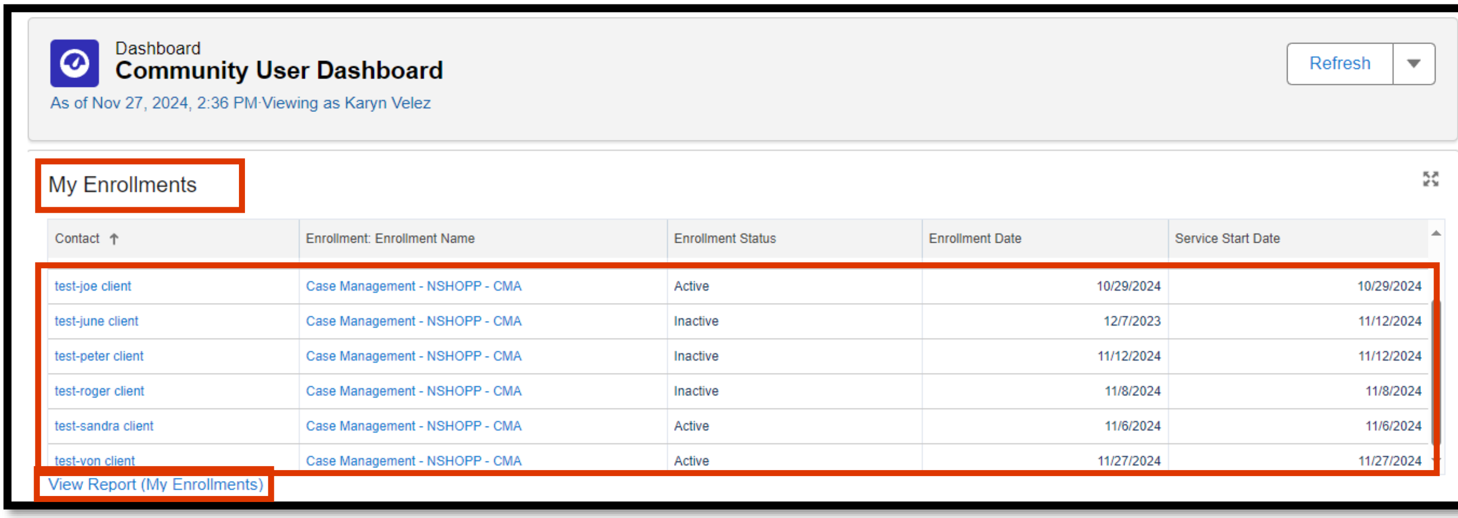
The **Refresh** button is used to "refresh" the various sections of the **Dashboard** page – **My Enrollments**, **My Follow-Ups** or **My Tasks**. Updates could include a listing of a newly assigned client or follow-up request. Also, the **Refresh** button will update any status changes with an enrolled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

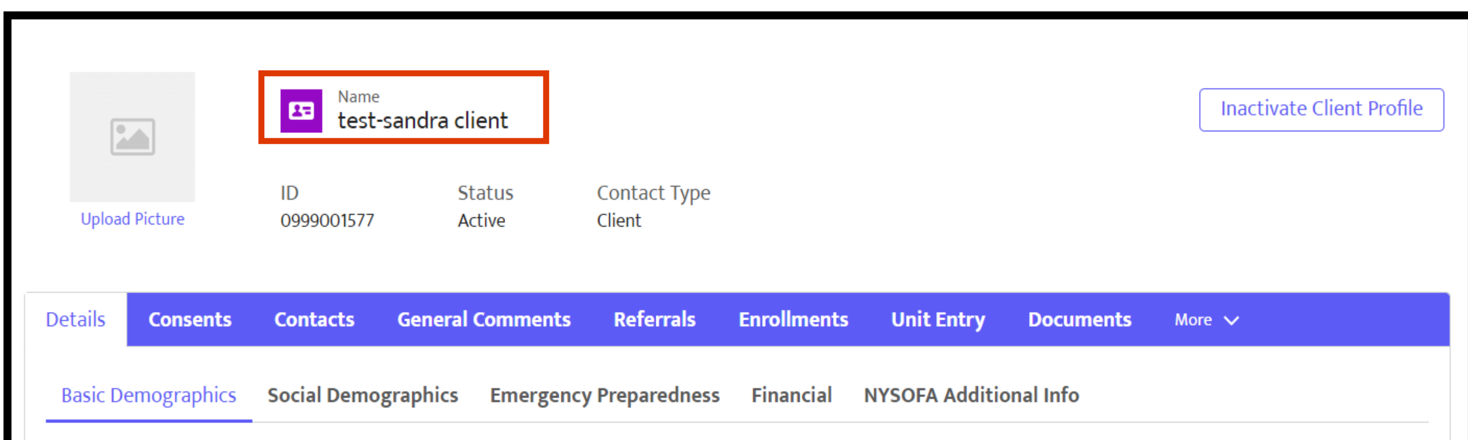


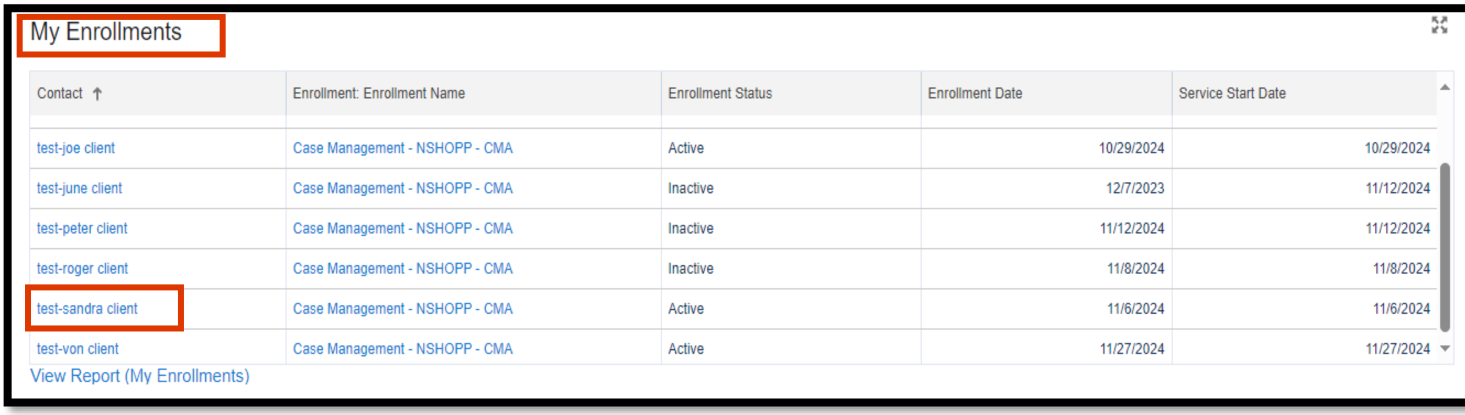
You can also review any reports associated with assigned clients on this portion of the page by clicking the hyperlink **View Report (My Enrollments)** at the bottom left. Finally, you can also access client files directly from **My Enrollments**.

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

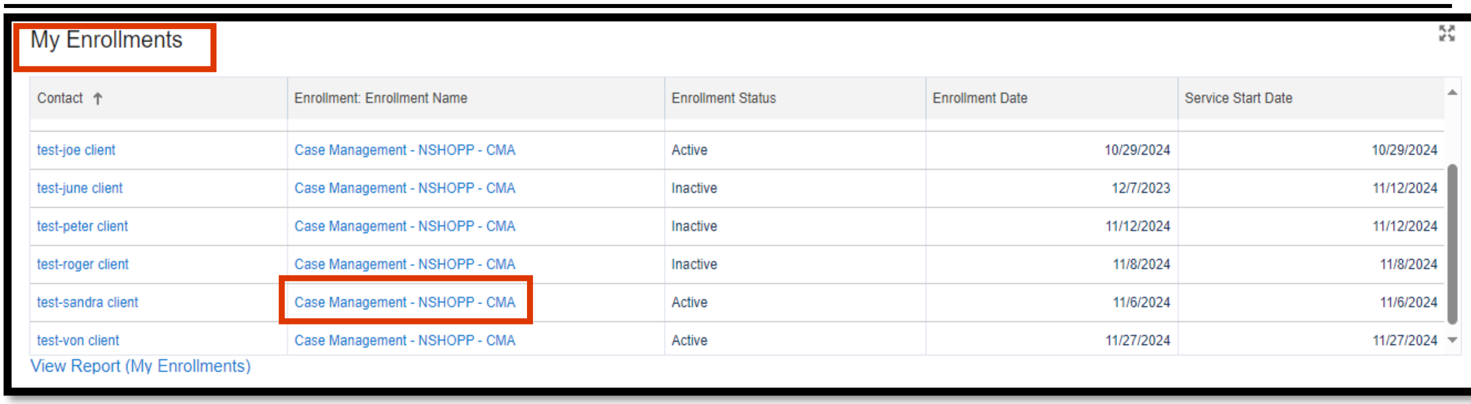
View Report (My Enrollments)

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 Follow-Ups



My Enrollments

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

View Report (My Enrollments)

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

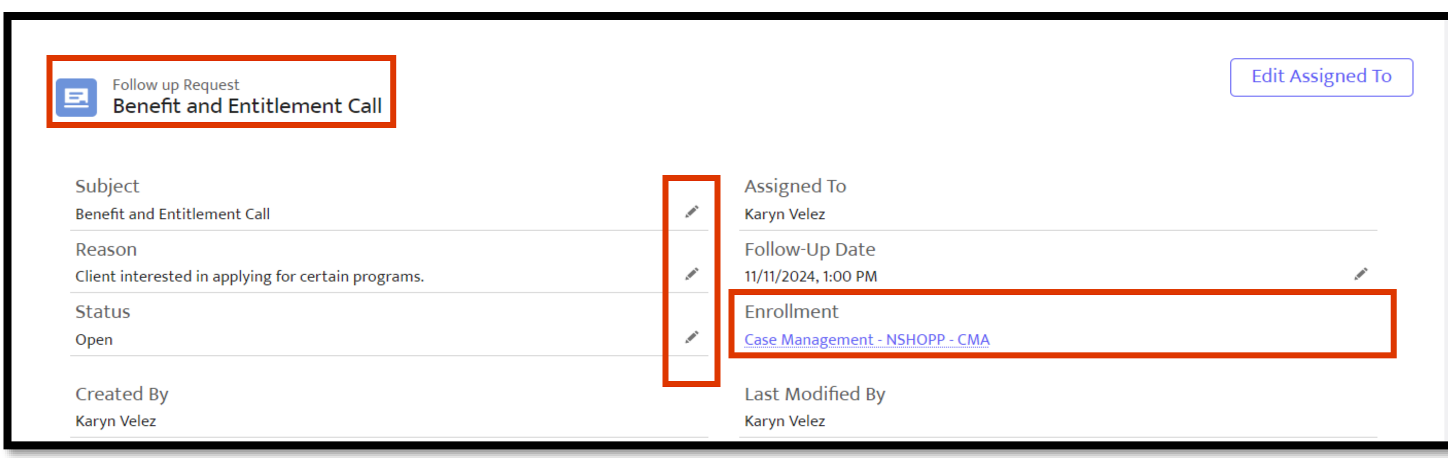
You can also review any records associated with assigned requests on this portion of the page by clicking the **View Report (My Follow-Ups)** link at the bottom left of this section.

Accessing the Follow-Up Request Screen

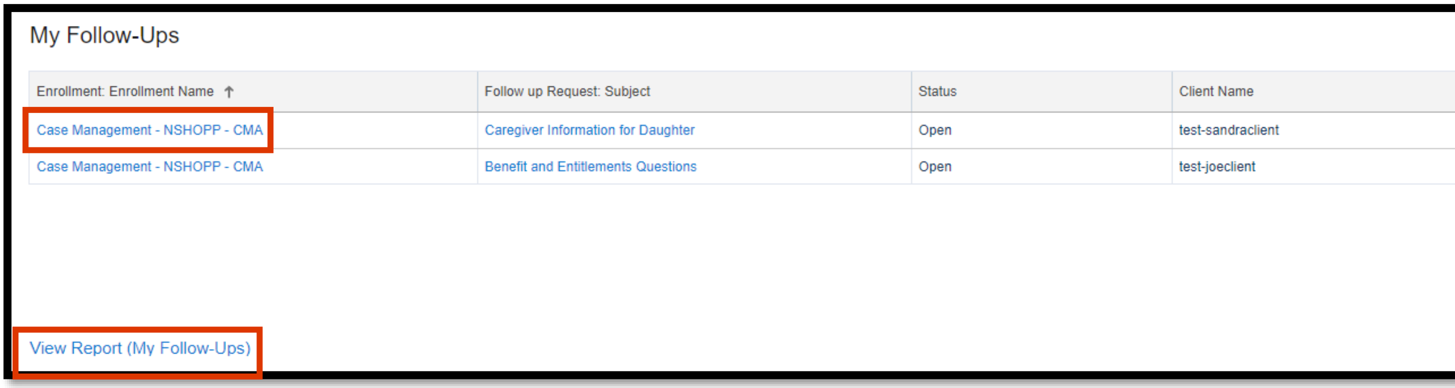
From the Dashboard's **My Follow-Ups** section, click the **Follow-Up Request Subject** link.

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**.

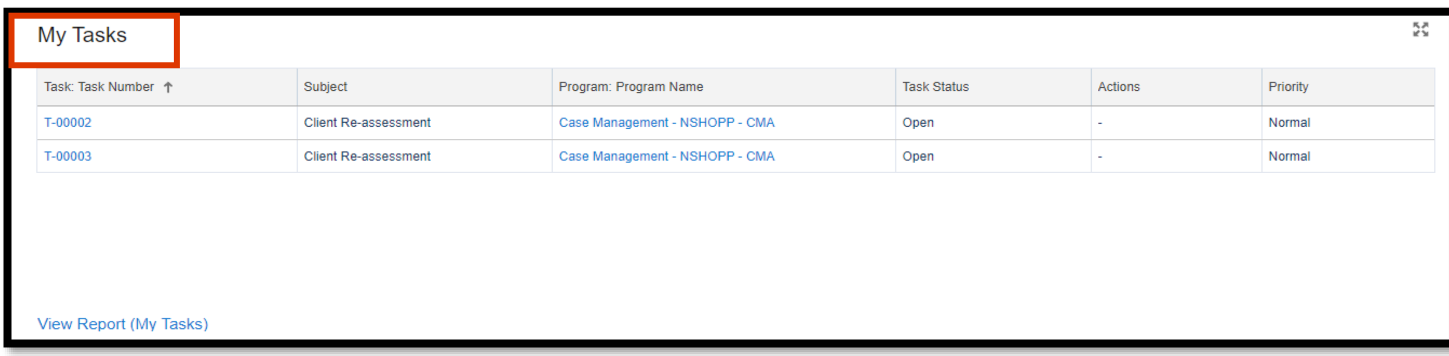


Also available from **My Follow-Ups** on the **Dashboard** is a link to the client's **Enrollment Menu**.



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.

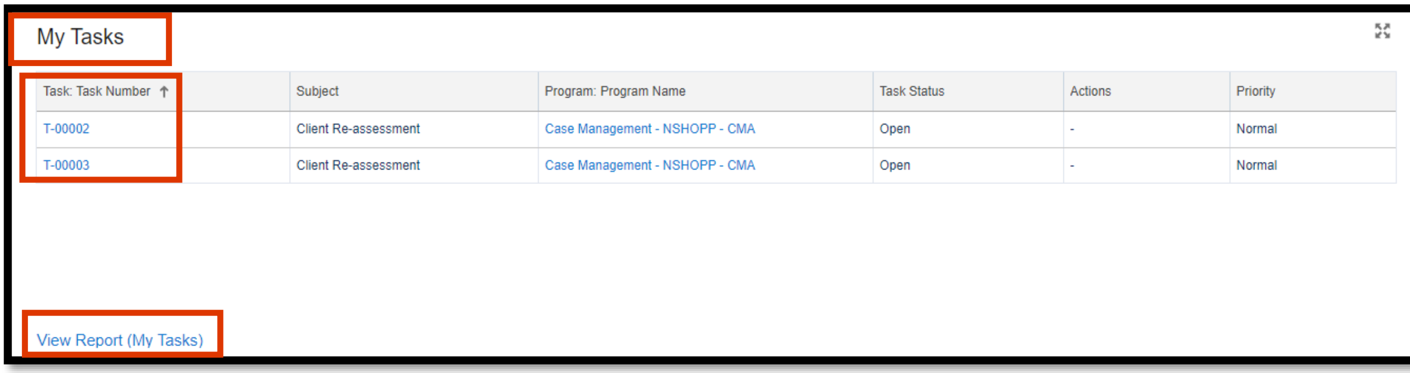


My Tasks displays information such as the type of client profile update needed, the **Task Status** (Open, In Progress or Closed), any **Actions** that have been taken regarding the task and the task's **Priority** level (Normal, Medium or High). In addition, under the heading **Task: Task Number**,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

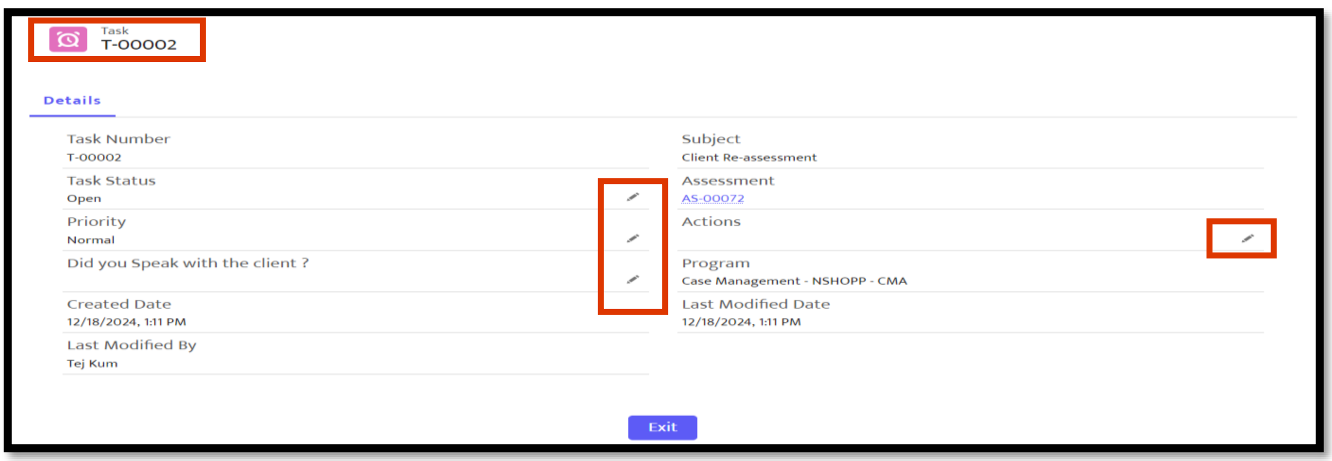
VIVÉ program users can also review a report on their **My Tasks** by clicking the link **View Report (My Tasks)** on the bottom left.

Accessing the Task Details

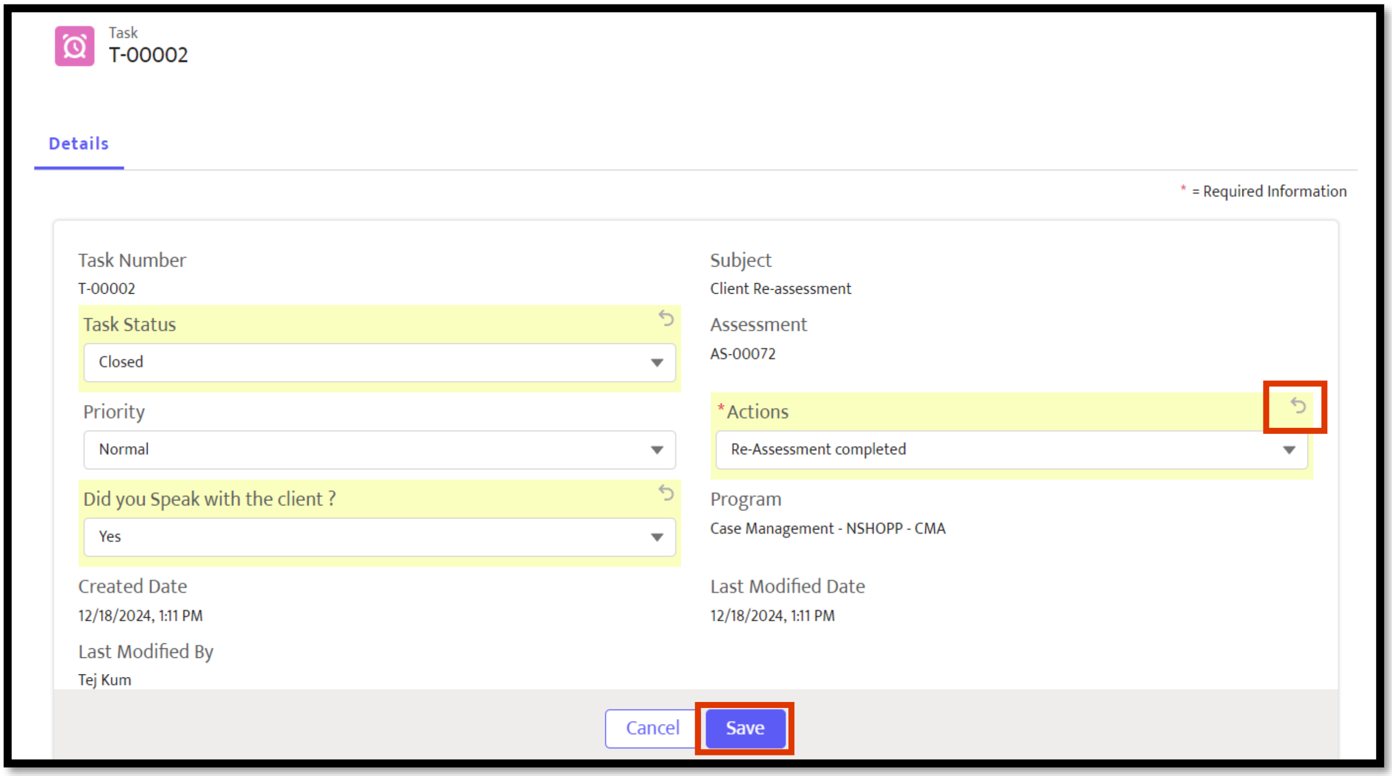
Step 1: From **My Tasks**, click the **Task: Task Number** link for the desired task. Once clicked, the **Task Details** screen will display related task information such as a hyperlink that directs you to the last Client Enrollment or **Assessment** created for the client. You will also be able to edit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

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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

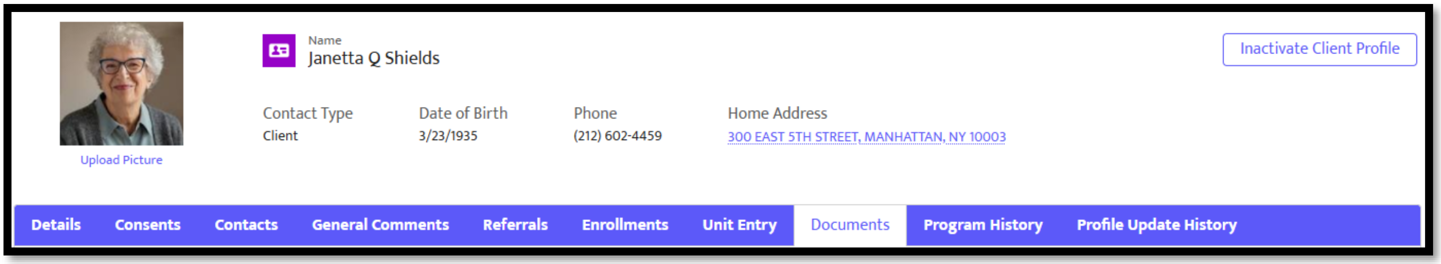
Documents featured in VIVÉ provides the ability for you to add, edit, and view a record of various document types associated with a client's file by uploading them into the database.

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

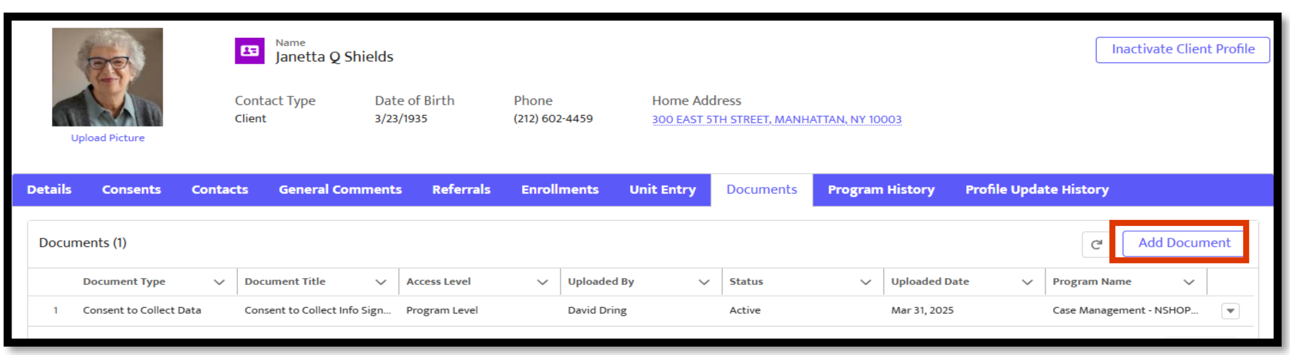
Adding Documents

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.)

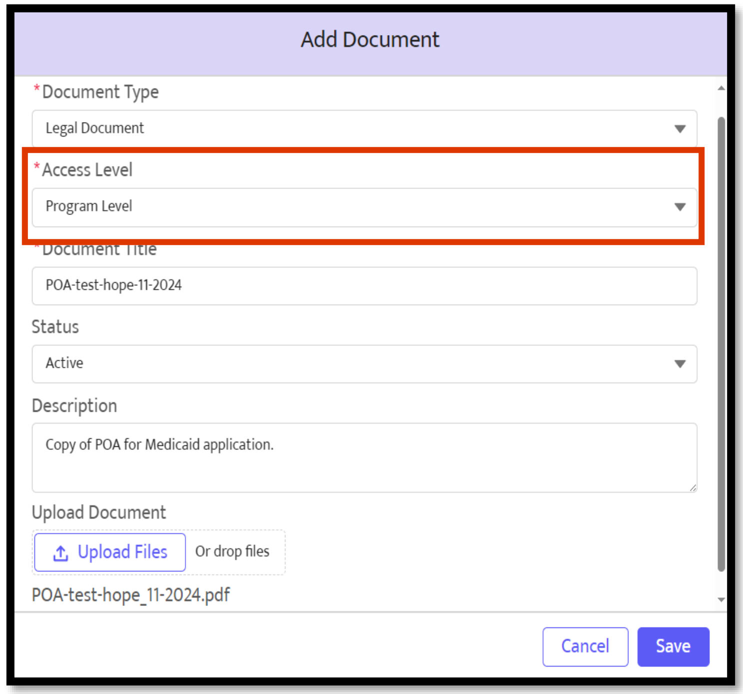
Step 1: From the **Top Menu**, click **Client Search**, click the client's name link.

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.



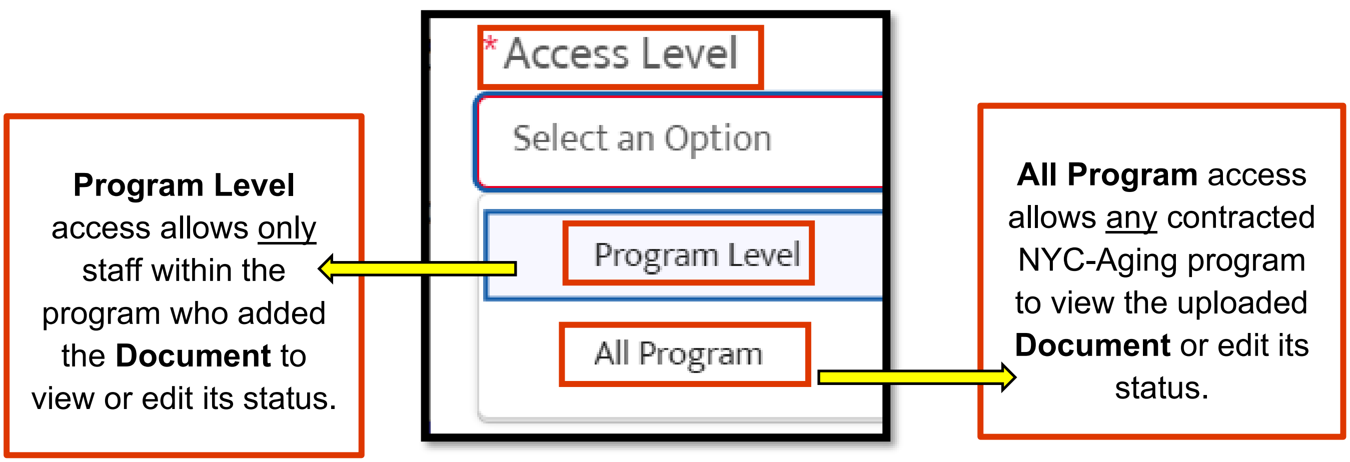
Step 4: On the **Add Document** pop-up, complete the required fields of **Document Type, Access Level** and **Document Title**. The **Status** field will automatically default to the status of **Active**. If needed, provide a **Description** of the documentation.



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.

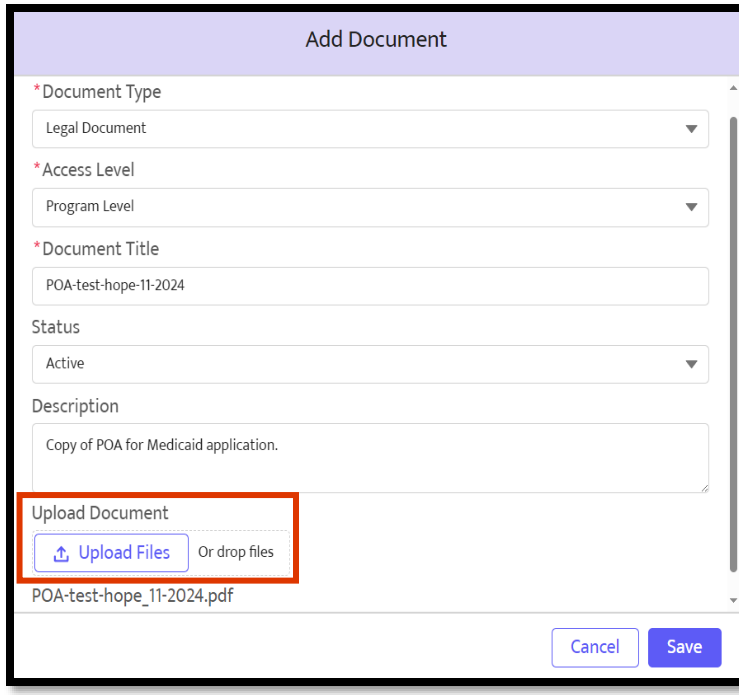
The two **Access Level** options are: **Program Level** and **All Program**.



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.

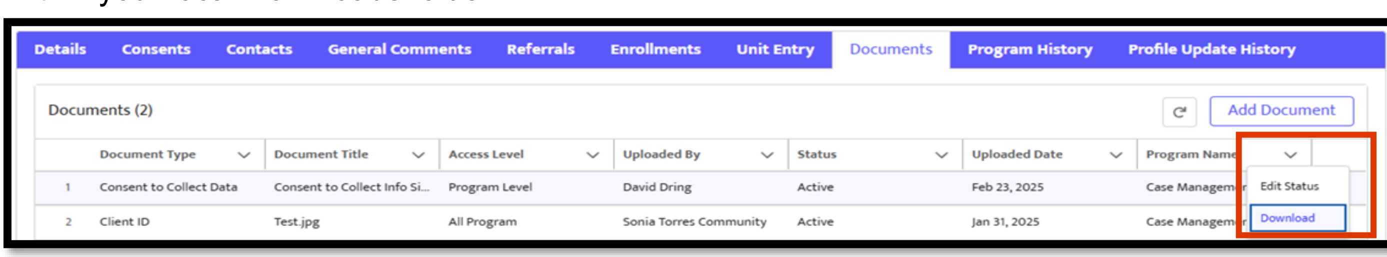
TIP: *Keeping various client documentation in one central location can be helpful when the need to access documents arises. Deciding to upload a client's documentation to the **Documents** feature on either the **Details** level or the **Enrollment** level, not both, may prove useful.*

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:

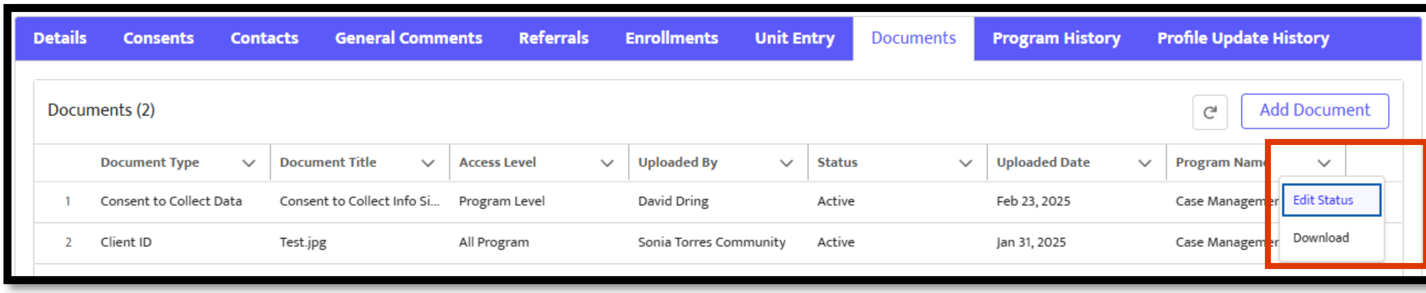
Step 1: Select the dropdown arrow and pick **Download**. Using the browser, the document is placed within your local Downloads folder.



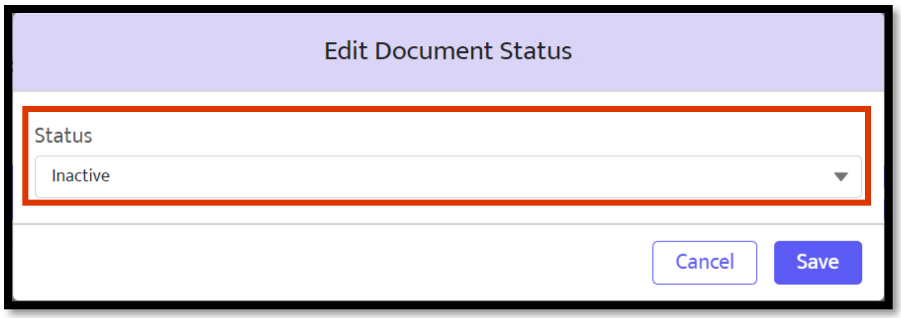
Edit Document Status

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

VIVÉ Knowledge Base contains reference guides, short videos and recorded training.

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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:

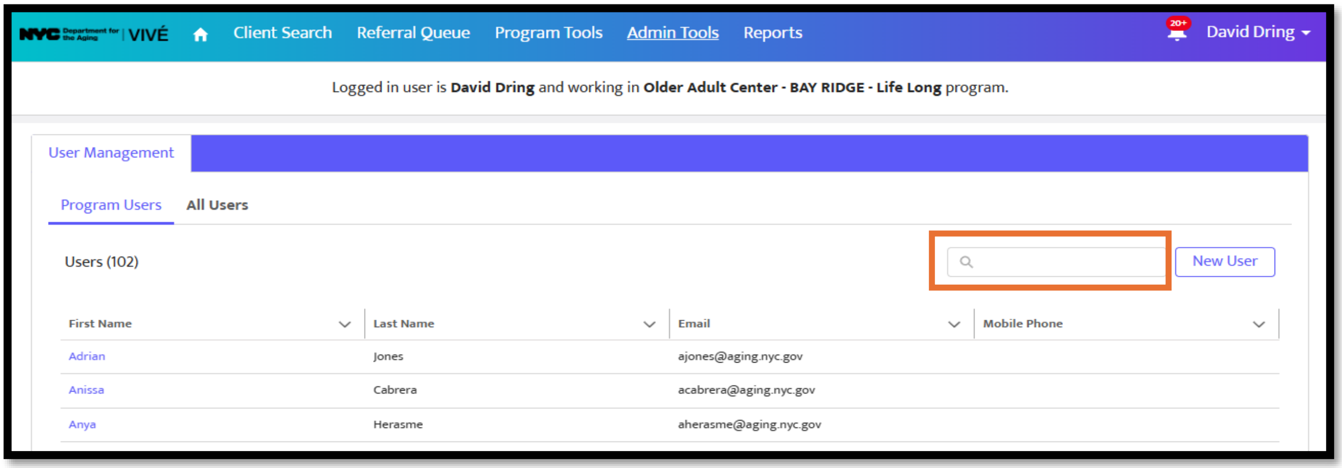
- **Accessing Admin Tools**
- **Viewing Users**
    - Searching for Users
- **Creating a New User**
- **Editing a User**
    - Editing Basic Information
    - Editing User Roles with Program Associations
- **Inactivating a User from a Program Association**

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.

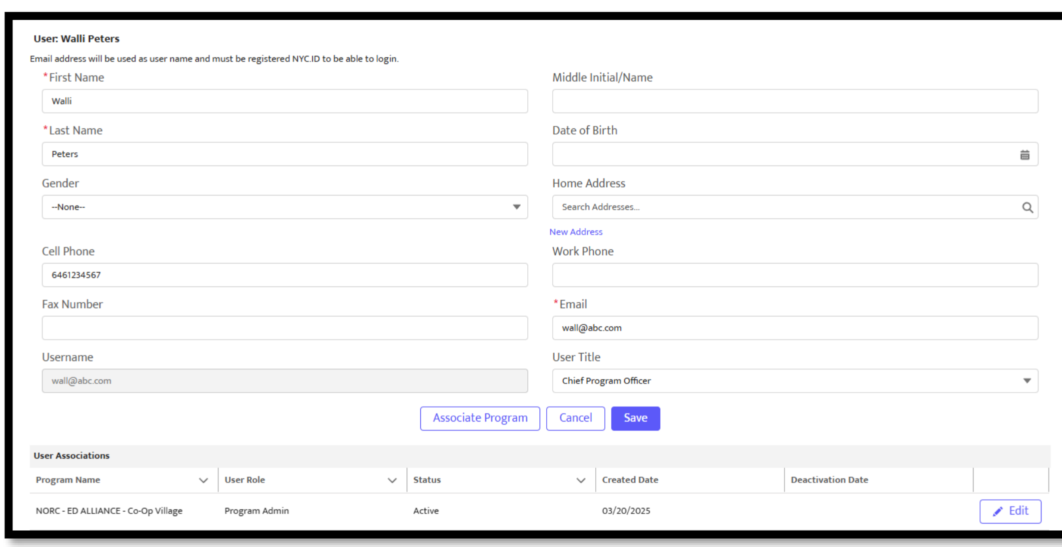


Viewing Users

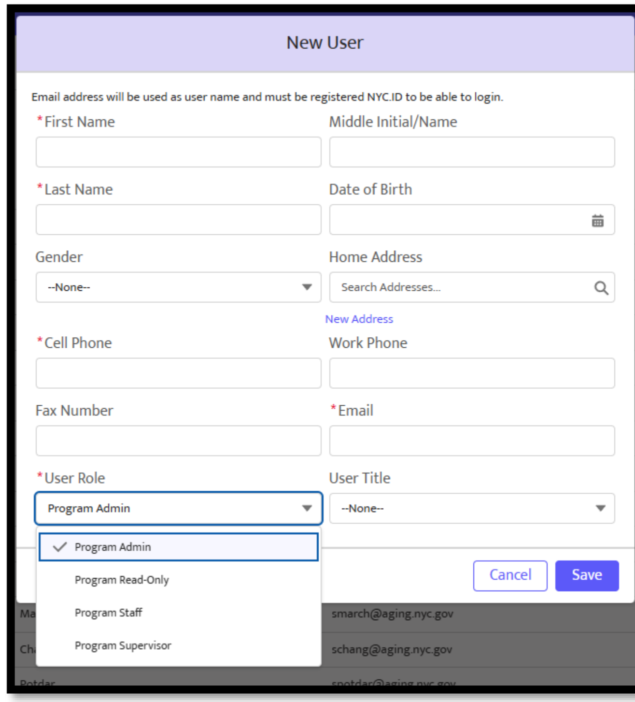
There are two types of users within VIVÉ. The first are Program Users, those users who are associated with your program. The second are all other users. These include every user within VIVÉ. You have access to them should you ever need to associate them with your program.

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.

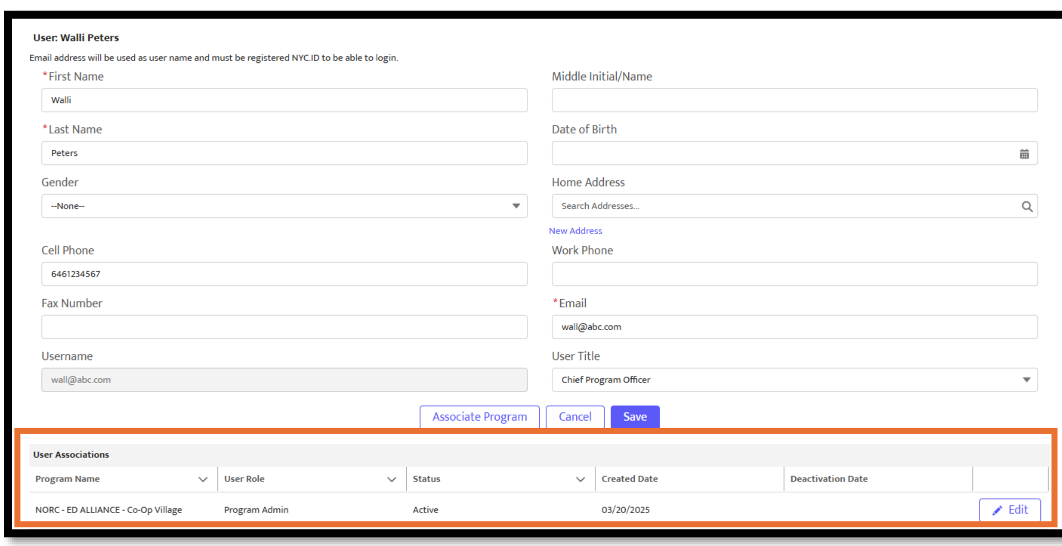
Step 3: From the **New User** pop-up, enter the required fields, such as Name, Phone #, Email and User Role.

***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.

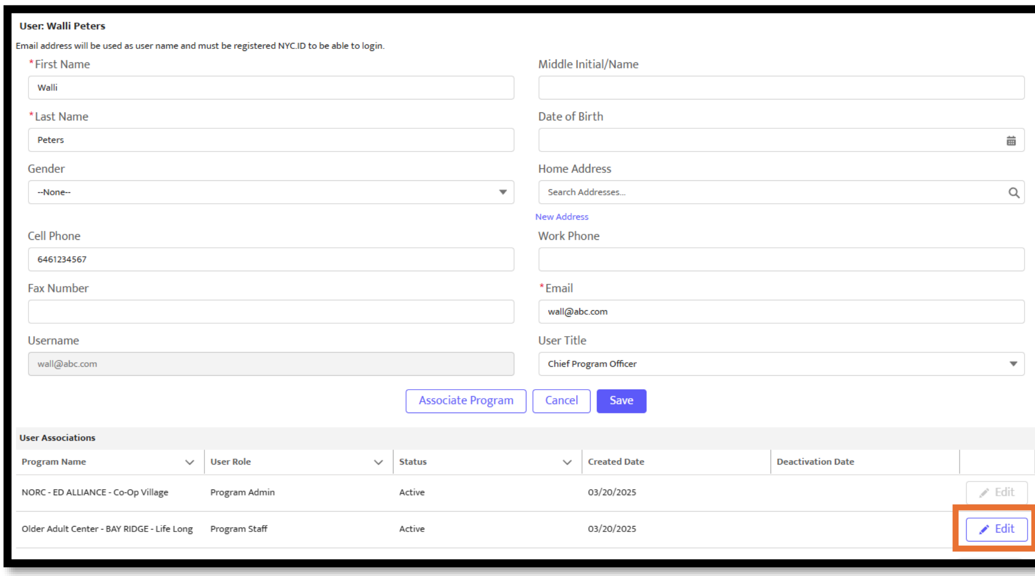
Editing Basic Information

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.

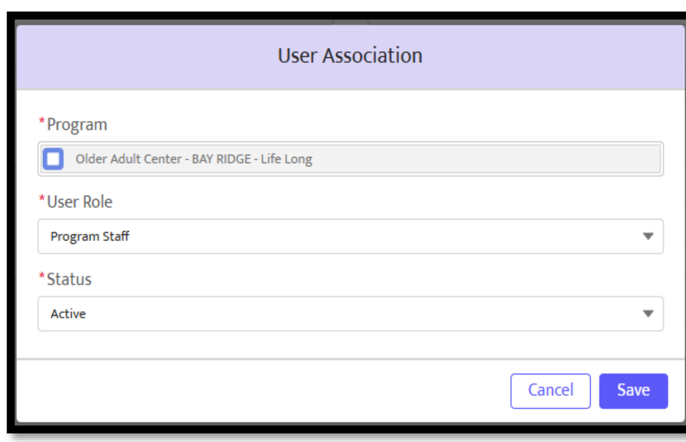
Editing User Roles with Program Associations



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

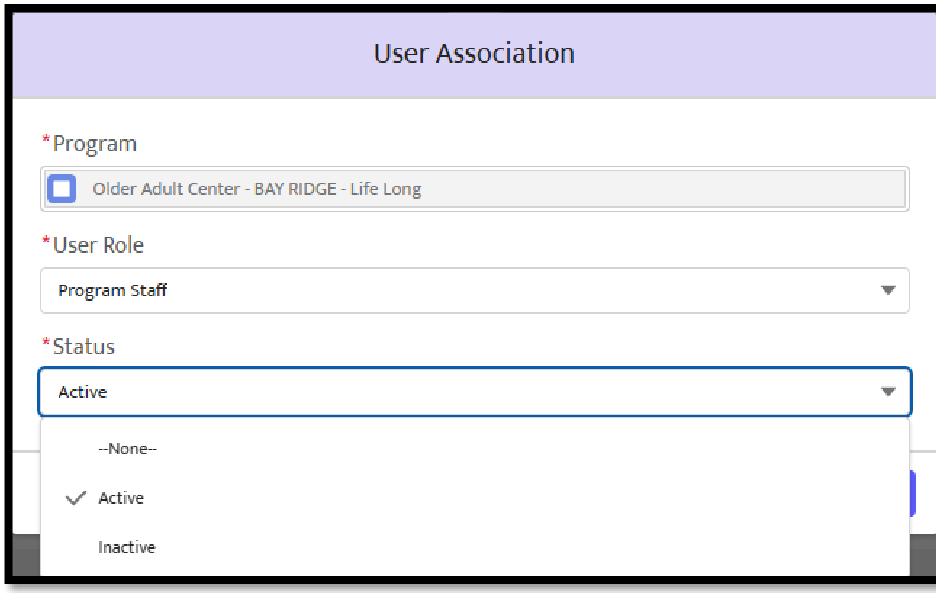
While users are never deleted from the system, they are inactivated from a program. In this way, they can be reactivated with another program later.

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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Return to VIVÉ Knowledge Base