

MAY 9, 2025

VIVÉ REFERENCE GUIDE

HOME DELIVERED MEALS



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.

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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:

- **Home Delivered Meals Navigation**
- **Territory Management**
 - Adding a New Territory
 - Editing a Territory
- **Driver Management**
 - Managing Driver Users
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 - Editing a Driver
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VIVÉ Knowledge Base – Home Delivered Meals

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

- | | | |
|--|-------------------------------|---------------------------------|
| • Basic Navigation | • Contacts | • Glossary |
| • Case Notes | • Dashboard | • Notifications |
| • Client Profile | • Documents | • NYC.ID Login |
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Overview

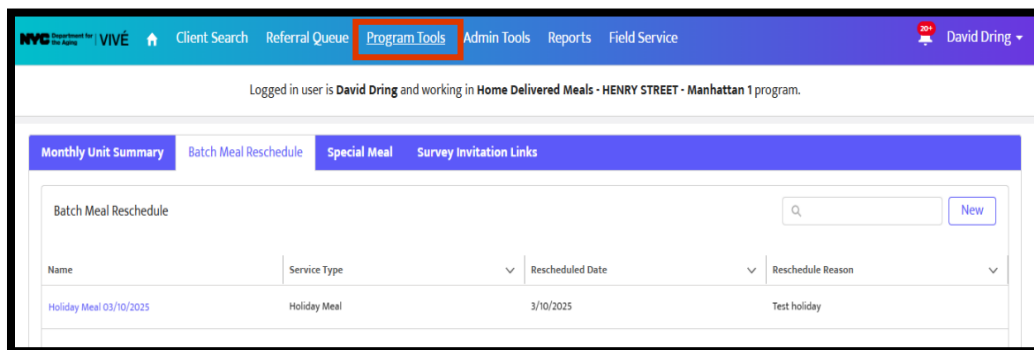
The Home Delivered Meals (HDM) program is unique in that it operates through the VIVÉ portal (desktop web browser based) and a mobile device, such as a tablet. This guide provides instructions on how to be successful with both applications.

Home Delivered Meals Navigation

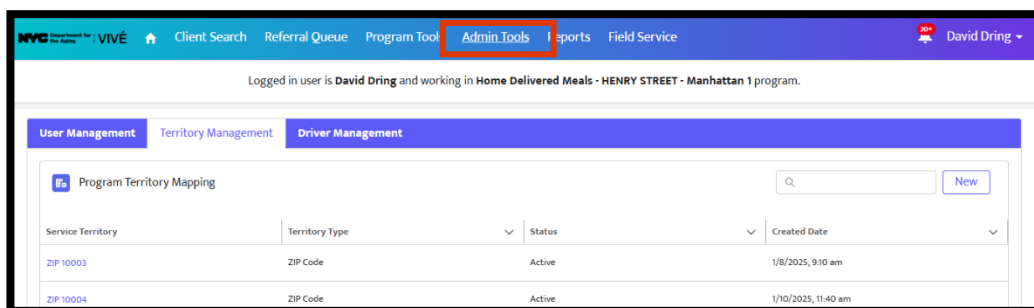
There are four key sections of VIVÉ for HDM programs: Program Tools, Admin Tools, Field Service, and the HDM Driver's App. The other areas of the VIVÉ service are common and have their own guides on the [Knowledge Base](#). Below is an overview of the three key HDM navigational elements.

Program Tools:

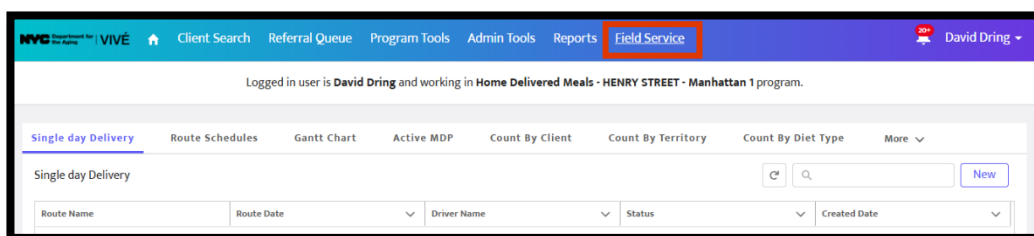
Monthly Unit Summary, Batch Meal Reschedule, Special Meals and Survey Invitation Links.



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.

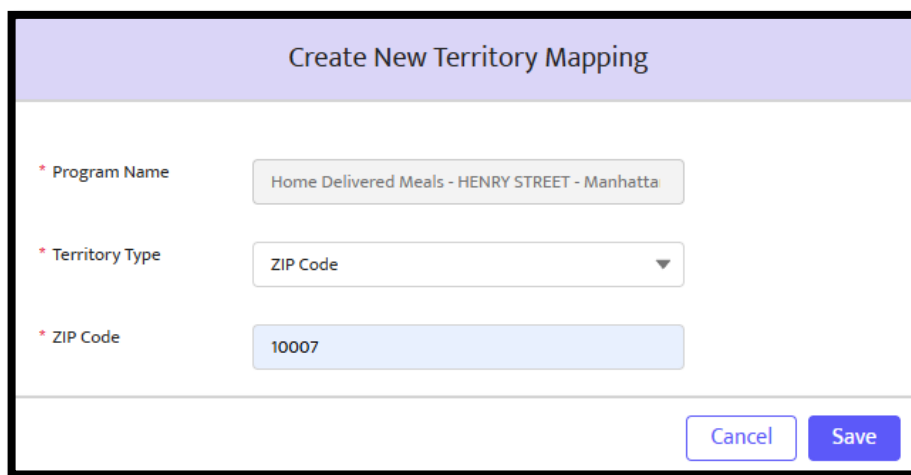
The other way to create and manage routes is manually. You do not need to create territories to manage your routes manually.

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.



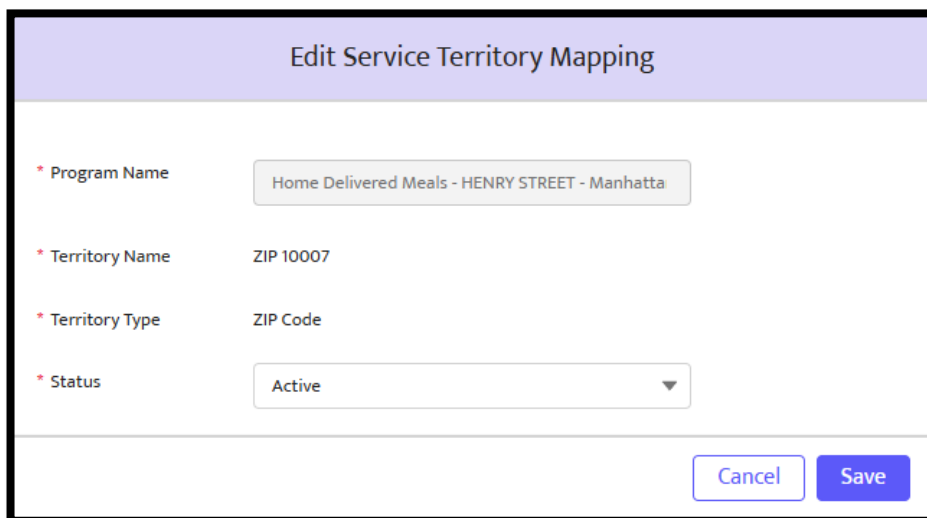
The screenshot shows a web form titled "Create New Territory Mapping". It has a light purple header. The form contains three fields: "Program Name" with a text input containing "Home Delivered Meals - HENRY STREET - Manhatta", "Territory Type" with a dropdown menu showing "ZIP Code", and "ZIP Code" with a text input containing "10007". At the bottom right, there are two buttons: "Cancel" (light blue) and "Save" (dark blue).

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.



The screenshot shows a web form titled "Edit Service Territory Mapping". It has a light purple header. The form contains four fields: "Program Name" with a text input containing "Home Delivered Meals - HENRY STREET - Manhatta", "Territory Name" with a text input containing "ZIP 10007", "Territory Type" with a text input containing "ZIP Code", and "Status" with a dropdown menu showing "Active". At the bottom right, there are two buttons: "Cancel" (light blue) and "Save" (dark blue).

Driver Management

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

Managing Driver Users

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

* First Name
Matt

* Last Name
Monday

Gender
--None--

Cell Phone
301-999-2345

Fax Number

Username
matt@cool.com

Middle Initial/Name

Date of Birth

Home Address
Search Addresses...

New Address

Work Phone

* Email
matt@cool.com

User Title
--None--

HDM Licenses

☐ Dispatcher License

☐ Driver License

[Associate Program](#) [Cancel](#) [Save](#)

Program Name	User Role	Status	Created Date	Deactivation Date	
Home Delivered Meals - HENRY ST...	Program Read-Only	Active	01/05/2025		Edit

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.

User Association

* Program
Home Delivered Meals - HENRY STREET - Manhattan 1

* User Role
Program Read-Only

* Status
Active

[Cancel](#) [Save](#)

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.

Driver Name	User	Status
Back Up Driver	Alexandra Mena	Active
Back-Up Driver	Back-Up Driver	Active
Driver - Ashley	Ash Abbott	Active
Driver - David	David Dring	Active
Driver - Dinesh	Dinesh Kothuru	Active
Driver - Nancy	Nancy Nybergh	Active
New Driver Jan 10	New driver Jan 10	Active

Showing 1 of 1 Page(s) << First < Previous Next > Last >> Total Records: 7

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.

The screenshot shows the 'Create Route Schedule' form. The 'Driver' field is highlighted with an orange border, and a dropdown menu is open showing a list of driver names: 'Driver - David', 'Driver - Dinesh', 'Driver - Ash', 'Driver - Nancy', and 'Driver - Siegel'. The form also includes fields for Route Name, Route Status, Start Date, End Date, Start Time, and Start Location.

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**.

Create Route Schedule

*Route Name

Route 10009

*Route Status

Active

*Start Date

Mar 24, 2025

End Date

*Start Time

8:00 AM

*Driver

Driver - David

*Start Location

265 HENRY STREET, MANHATTAN, NY 10002

*Select Delivery Days

Available

Wednesday

Thursday

Friday

Saturday

Chosen

Monday

Tuesday

New Address

Cancel

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**.

Create Route Schedule

☒ Select Clients Manually

Clients

SELECT	CLIENT NAME	CLIENT ID	DIET TYPE	ADDRESS
☐	Andrew J Adams DR	0999001980		180 PARK ROW, 11B, MANHATTAN, NY 10007
☐	Ani Bashar	0999002130		2 LAFAYETTE STREET, 22, MANHATTAN, NY 10007
☐	Anita Alexander	0999001970		105 DUANE STREET, 4G, MANHATTAN, NY 10007

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**.

Create Route Schedule

☐ Select Clients Manually

* Max Stops
100

Service Territory

SELECT	TERRITORY NAME
☒	ZIP 10003
☐	ZIP 10004
☒	ZIP 10007

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**.

Edit Route Schedule

* Route Name
Route 10008

* Route Status
Active

* Start Date
Mar 24, 2025

End Date

* Start Time
8:00 AM

* Driver
Back-Up Driver

* Start Location
265 HENRY STREET, MANHATTAN, NY 10002

New Address

Cancel 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

Edit Route Schedule

☒ Select Clients Manually

Previous Cancel Save

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**.

The screenshot shows the 'Edit Route Schedule' window. At the top, there's a header 'Edit Route Schedule'. Below it, on the left, is a checkbox labeled 'Select Clients Manually'. On the right, there's a field for '* Max Stops' with the value '100'. Below the checkbox is a section titled 'Service Territory' with a search bar. Underneath is a table with two columns: 'SELECT' and 'TERRITORY NAME'. The table contains three rows: the first row has a checked checkbox and 'ZIP 10003'; the second row has an unchecked checkbox and 'ZIP 10004'; the third row has an unchecked checkbox and 'ZIP 10007'.

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**.

The screenshot shows the 'Create New Single day Delivery' form. It has a header 'Create New Single day Delivery'. The form contains several fields: '* Route Name' (text input), '* Status' (dropdown menu with 'Active' selected), '* Route Date' (calendar icon), '* Route Time' (clock icon), '* Driver' (text input with search icon), and '* Start Location' (text input with a location pin icon and the address '265 HENRY STREET, MANHATTAN, NY 10002'). Below the start location is a link 'New Address'. At the bottom right are 'Cancel' and 'Next' buttons.

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**.

:

Route Test 03/24/2025

Exit

Details Related Service Appointments

Route Name	Route Test 03/24/2025	Route Date	3/24/2025
Maximum Stops	10	Driver	Driver - David
Status	Active	Select Clients Manually	☒
Program	Home Delivered Meals - HENRY STREET - Manhattan 1	Owner	Home Delivered Meals - HENRY STREET - Ma
Start Location	265 HENRY STREET, MANHATTAN, NY 10002		
Route Time	6:00:00 AM		

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.

Monthly Unit Summary Batch Meal Reschedule Special Meal Survey Invitation Links

Batch Meal Reschedule

Search New

Name	Service Type	Rescheduled Date	Reschedule Reason
Holiday Meal 03/10/2025	Holiday Meal	3/10/2025	Test holiday

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.

The screenshot shows the 'Batch Meal Reschedule' tab in the system. At the top, there are four tabs: 'Monthly Unit Summary', 'Batch Meal Reschedule' (selected), 'Special Meal', and 'Survey Invitation Links'. Below the tabs, there are three input fields: '*Select Date' (with a calendar icon, showing 'Mar 25, 2025'), '*Service Type' (a dropdown menu showing 'Emergency Meal Citymeals Funded'), and '*Reason to Reschedule' (a text input showing 'Snow Storm'). Below these fields are two buttons: 'Search Client' and 'Back to List'. The main part of the interface is a table with the following columns: Client, Original Date, New Date, Original Diet Ty..., New Diet Type, Service Type, Funding Source, Quantity, and Acti... (Actions). The table contains six rows of client data. The 'Quantity' and 'Acti...' columns are highlighted with orange boxes. The 'Quantity' column shows the value '1' for all clients. The 'Acti...' column shows a downward-facing triangle icon for all clients.

Client	Original Date	New Date	Original Diet Ty...	New Diet Type	Service Type	Funding Source	Quantity	Acti...
1 Dor Allison	03/25/2025	03/24/2025	Hot Regular	Frozen Regular	Weekday	NYC Aging Funded S...	1	▼
2 Richard Anderson	03/25/2025	03/24/2025	Hot Regular	Frozen Regular	Weekday	NYC Aging Funded S...	1	▼
3 Susan Allen	03/25/2025	03/24/2025	Hot Regular	Frozen Regular	Weekday	NYC Aging Funded S...	1	▼
4 Wayne Arnold	03/25/2025	03/24/2025	Hot Russian	Frozen Russian	Weekday	NYC Aging Funded S...	1	▼
5 William Armstrong	03/25/2025	03/24/2025	Hot Regular Vegetari...	Frozen Regular ...	Weekday	NYC Aging Funded S...	1	▼
6 Ellen Leong	03/25/2025	03/24/2025	Hot Regular	Frozen Regular	Weekday	NYC Aging Funded S...	1	▼

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**.

Monthly Unit Summary | **Batch Meal Reschedule** | **Special Meal** | **Survey Invitation Links**

*Select Date: Mar 10, 2025 | *Service Type: Holiday Meal | *Reason to Reschedule: Test holiday

[Search Client](#) | [Back to List](#)

Client	Original Date	New Date	Original Diet Ty...	New Diet Type	Service Type	Funding Source	Quantity	Acti...
1 Dor Allison	03/10/2025	03/08/2025	Hot Regular	Frozen Regular	Holiday Meal	NYC Aging Funded S...	1	▼
2 Richard Anderson	03/10/2025	03/09/2025	Hot Regular	Frozen Regular	Holiday Meal	NYC Aging Funded S...	1	▼
3 Susan Allen	03/10/2025	03/09/2025	Hot Regular	Frozen Regular	Holiday Meal	NYC Aging Funded S...	1	▼
4 Wayne Arnold	03/10/2025	03/09/2025	Hot Russian	Frozen Russian	Holiday Meal	NYC Aging Funded S...	1	▼
5 Ellen Leong	03/10/2025	03/11/2025	Hot Regular	Frozen Regular	Holiday Meal	NYC Aging Funded S...	1	▼

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.

Monthly Unit Summary | **Batch Meal Reschedule** | **Special Meal** | **Survey Invitation Links**

Special Meal Schedule [New](#)

Name	Service Type	Scheduled Date	Meal Type	Funding Source	Quantity
Special Meal Box 3/25/2025	Special Meal Box	03/25/2025	Box Meal	NYC Aging Funded Service	1

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.

Monthly Unit Summary | **Batch Meal Reschedule** | **Special Meal** | **Survey Invitation Links**

Special Meal Schedule

*Select Date: | *Service Type: | *Meal Type:

*Funding Source: | *Select Quantity:

[Search Client](#) | [Back to List](#)

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**.

The screenshot shows the 'Special Meal Schedule' interface. At the top, there are four tabs: 'Monthly Unit Summary', 'Batch Meal Reschedule', 'Special Meal' (which is active), and 'Survey Invitation Links'. Below the tabs, there is a form with the following fields:

- *Select Date:** A date picker showing 'Mar 24, 2025'.
- *Service Type:** A dropdown menu showing 'Special Meal Box'.
- *Meal Type:** A dropdown menu showing 'Box Meal'.
- *Funding Source:** A dropdown menu showing 'NYC Aging Funded Service'.
- *Select Quantity:** A text input field showing '1'.

Below the form are two buttons: 'Search Client' and 'Back to List'. Below the buttons is a table with the following columns: Client, Original Date, New Date, New Diet Type, Service Type, Funding Source, Quantity, and Actions. The table contains six rows of data, all with a quantity of 1. The 'Quantity' and 'Actions' columns are highlighted with orange boxes.

	Client	Original Date	New Date	New Diet Type	Service Type	Funding Source	Quantity	Acti...
1	Dor Allison	03/24/2025	03/24/2025	Box Meal	Special Meal Box	NYC Aging Funded Service	1	▼
2	Richard Anderson	03/24/2025	03/24/2025	Box Meal	Special Meal Box	NYC Aging Funded Service	1	▼
3	Susan Allen	03/24/2025	03/24/2025	Box Meal	Special Meal Box	NYC Aging Funded Service	1	▼
4	Wayne Arnold	03/24/2025	03/24/2025	Box Meal	Special Meal Box	NYC Aging Funded Service	1	▼
5	William Armstrong	03/24/2025	03/24/2025	Box Meal	Special Meal Box	NYC Aging Funded Service	1	▼
6	Ellen Leong	03/24/2025	03/24/2025	Box Meal	Special Meal Box	NYC Aging Funded Service	1	▼

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 screenshot shows the 'Special Meal Schedule' interface. At the top, there are four tabs: 'Monthly Unit Summary', 'Batch Meal Reschedule', 'Special Meal' (which is active), and 'Survey Invitation Links'. Below the tabs, there are several input fields:

- *Select Date: A date picker set to 'Mar 29, 2025'.
- *Service Type: A dropdown menu set to 'Special Meal Box'.
- *Meal Type: A dropdown menu set to 'Box Meal'.
- *Funding Source: A dropdown menu set to 'NYC Aging Funded Service'.
- *Select Quantity: A text input field set to '1'.

 Below these fields are two buttons: 'Search Client' and 'Back to List'. At the bottom, there is a table with the following columns: Client, Original Date, New Date, New Diet Type, Service Type, Funding Source, Quantity, and Action. The table contains five rows of data for clients: Dor Allison, Richard Anderson, Susan Allen, Wayne Arnold, and William Armstrong. Each row has a 'Delete' button in the Action column.

Client	Original Date	New Date	New Diet Type	Service Type	Funding Source	Quantity	Action
1 Dor Allison	03/29/2025	03/29/2025	Box Meal	Special Meal Box	NYC Aging Funded Service	1	Delete
2 Richard Anderson	03/29/2025	03/29/2025	Box Meal	Special Meal Box	NYC Aging Funded Service	1	Delete
3 Susan Allen	03/29/2025	03/29/2025	Box Meal	Special Meal Box	NYC Aging Funded Service	1	Delete
4 Wayne Arnold	03/29/2025	03/29/2025	Box Meal	Special Meal Box	NYC Aging Funded Service	1	Delete
5 William Armstrong	03/29/2025	03/29/2025	Box Meal	Special Meal Box	NYC Aging Funded Service	1	Delete

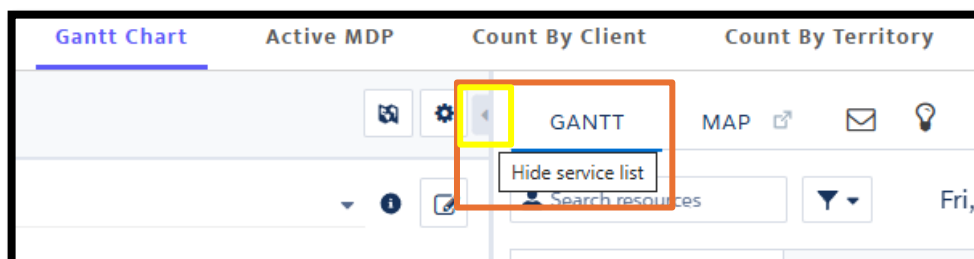
The Gantt Chart a Tool for Dispatchers

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.

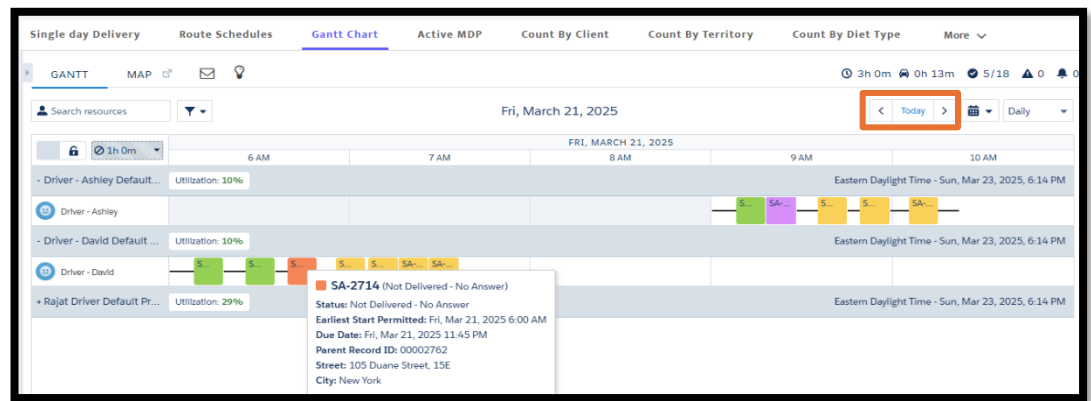
When the page first loads it may be in two parts. The Service details on the left and the Gantt chart on the right. It's best to focus on the Gantt chart. Hide the Service List by clicking on the left facing triangle at the top of the page.



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).**

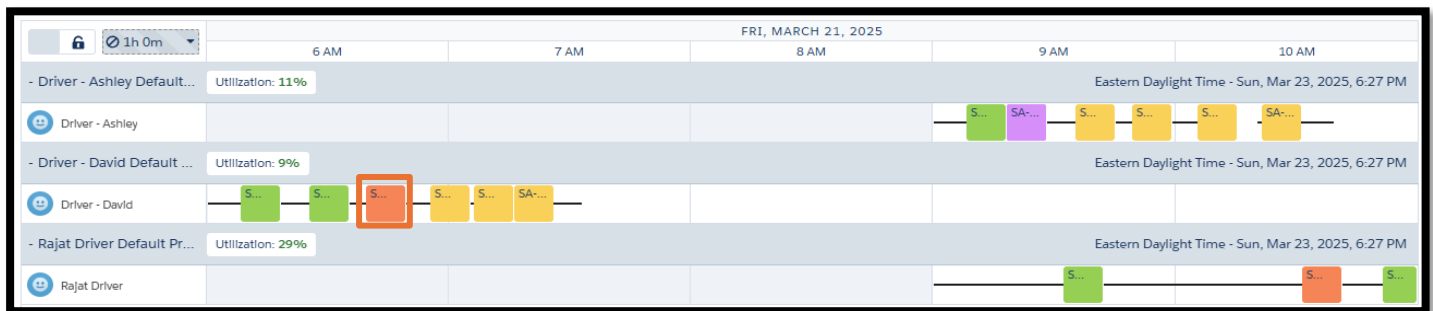
VIVÉ Knowledge Base – Home Delivered Meals

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.



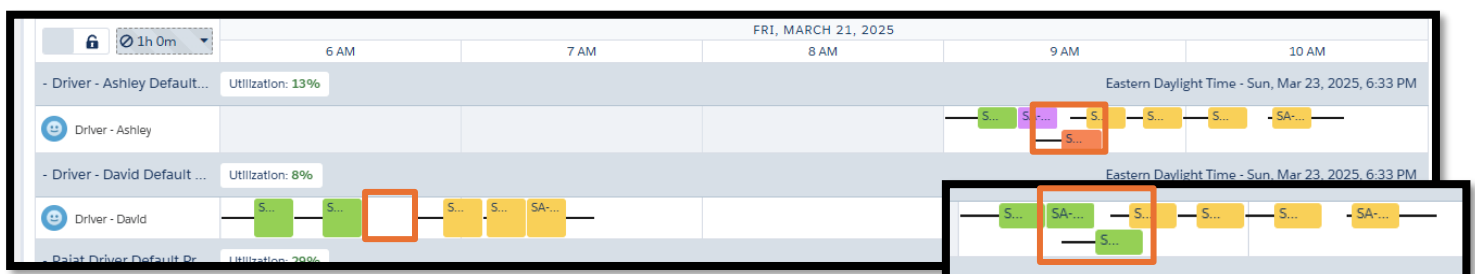
Using the Gantt Chart to Make a Last-Minute Rescheduling

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.



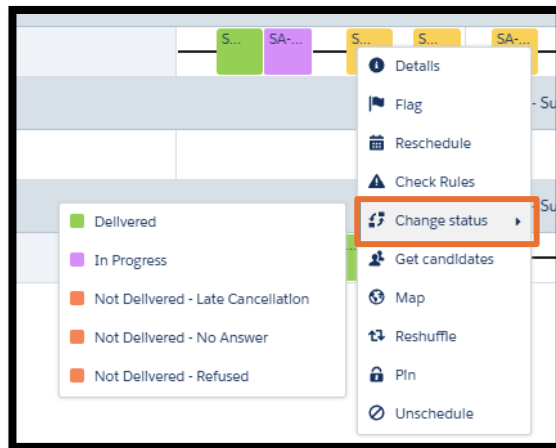
NOTE: As Drivers mark their Service Appointment/Delivery in progress, you will be able to know which is their next delivery. This can be helpful when client's call.

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.

The screenshot shows the 'Service Appointments' tab with a table of appointments. The 'Filter Status' dropdown is set to 'Select an Status to filter'. The 'Update Status To' dropdown is set to 'Select a New Status to update'. The 'Update Status' button is highlighted with an orange box. The 'Final' button is also highlighted with an orange box. A modal window titled 'SA-2910: Edit Status' is open, showing a status dropdown menu with options: In Progress (selected), None, Scheduled, Delivered, Not Delivered - No Answer, Not Delivered - Late Cancellation, and Not Delivered - Refused. The 'In Progress' option is highlighted with a blue checkmark. The modal window is also highlighted with an orange box.

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.

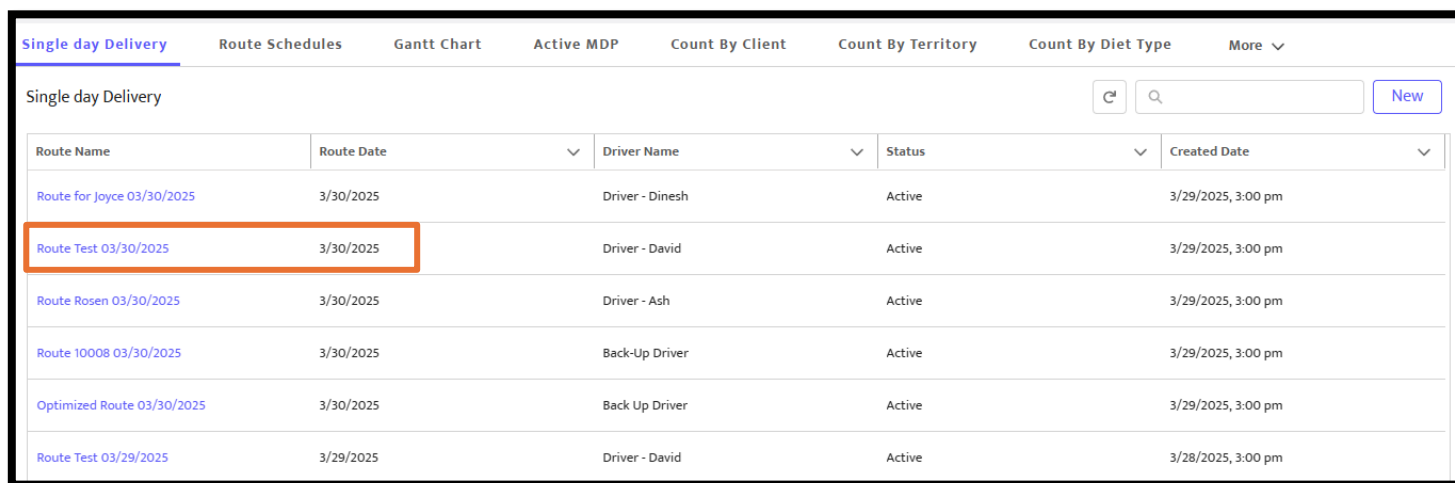
The screenshot shows the 'Service Appointments' tab with a table of appointments. The 'Filter Status' dropdown is set to 'In Progress'. The 'Update Status To' dropdown is set to 'Delivered'. The 'Update Status' button is highlighted with an orange box. The 'Final' button is also highlighted with an orange box. A modal window titled 'SA-2910: Edit Status' is open, showing a status dropdown menu with options: In Progress (selected), None, Scheduled, Delivered, Not Delivered - No Answer, Not Delivered - Late Cancellation, and Not Delivered - Refused. The 'In Progress' option is highlighted with a blue checkmark. The modal window is also highlighted with an orange box. The table shows appointments with status 'Delivered' and a pencil icon next to each row.

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).

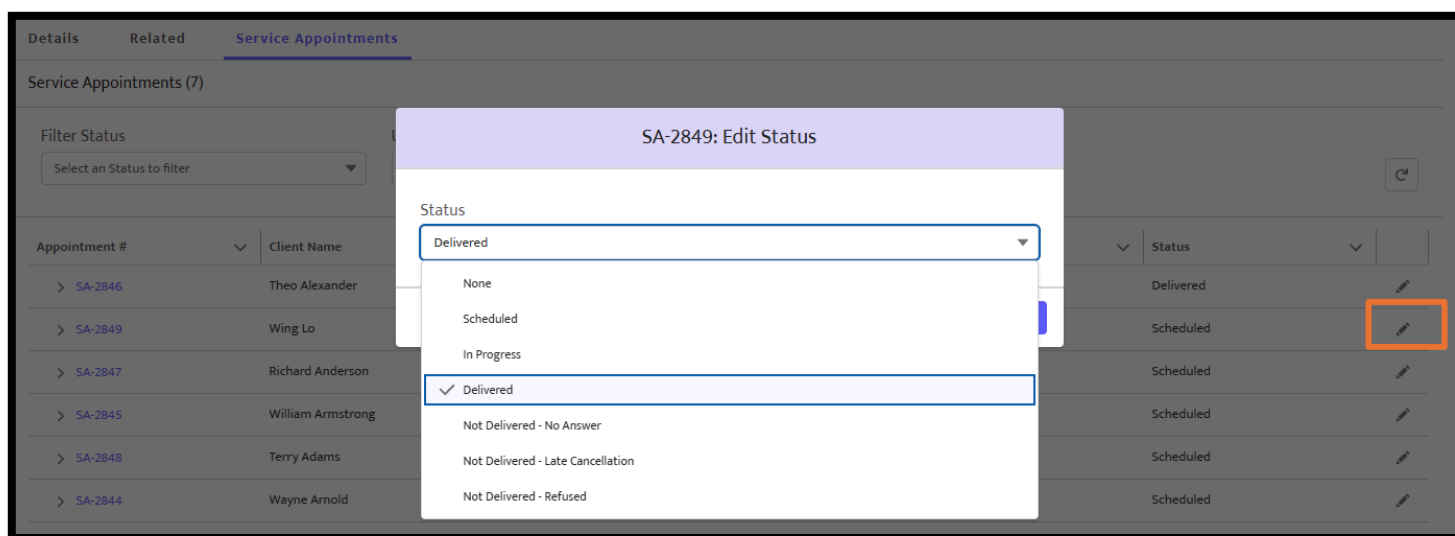
Step 1: From the Top Menu, click Field Service, click the Single Day Delivery tab.

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



Route Name	Route Date	Driver Name	Status	Created Date
Route for Joyce 03/30/2025	3/30/2025	Driver - Dinesh	Active	3/29/2025, 3:00 pm
Route Test 03/30/2025	3/30/2025	Driver - David	Active	3/29/2025, 3:00 pm
Route Rosen 03/30/2025	3/30/2025	Driver - Ash	Active	3/29/2025, 3:00 pm
Route 10008 03/30/2025	3/30/2025	Back-Up Driver	Active	3/29/2025, 3:00 pm
Optimized Route 03/30/2025	3/30/2025	Back Up Driver	Active	3/29/2025, 3:00 pm
Route Test 03/29/2025	3/29/2025	Driver - David	Active	3/28/2025, 3:00 pm

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



Appointment #	Client Name	Status
> SA-2846	Theo Alexander	Delivered
> SA-2849	Wing Lo	Scheduled
> SA-2847	Richard Anderson	Scheduled
> SA-2845	William Armstrong	Scheduled
> SA-2848	Terry Adams	Scheduled
> SA-2844	Wayne Arnold	Scheduled

SA-2849: Edit Status

Status

- Delivered
- None
- Scheduled
- In Progress
- ✓ Delivered
- Not Delivered - No Answer
- Not Delivered - Late Cancellation
- Not Delivered - Refused

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.

Appointment #	Client Name	Address	Delivery Time	Status	
> SA-2846	Theo Alexander	170 Park Row, 13E New York NY 10013	06:08:00	Delivered	
SA-2849	Wing Lo	170 Park Row, 8D New York NY 10013	06:18:00	Scheduled	
Product#: PREQ-2989		Diet Type: Hot Regular		Quantity: 1.00	

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.

Single day Delivery

Route Schedules

Gantt Chart

Active MDP

Count By Client

Count By Territory

Count By Diet Type

More

List of Clients with Active MDP

Client Name	Enrollment Status	MDP Status	Diet Types	Start Date	End Date	Address	Zip Code	Community Distr.
Andrew J Adams DR	Active	Service Started	Hot Regular, Hot Regul...	12/24/2024		180 PARK ROW, 11B, MA...	10007	103
Ani Bashar	Active	Service Started	Hot Regular, Frozen Re...	2/5/2025		2 LAFAYETTE STREET, 2...	10007	101

Single day Delivery	Route Schedules	Gantt Chart	Active MDP	Count By Client	Count By Territory	Count By Diet Type	More
Count By Client							
Start Date		End Date					
3/29/2025		4/4/2025		Search			
Client Name ↑	03/29/2025	03/30/2025	03/31/2025	04/01/2025	04/02/2025	04/03/2025	04/04/2025
Andrew J Adams DR	2	1	1	1	1	1	1
Ani Bashar	2	0	3	0	0	2	0
Anita Alexander	3	2	1	1	1	1	1

Single day Delivery	Route Schedules	Gantt Chart	Active MDP	Count By Client	Count By Territory	Count By Diet Type	More
Count By Territory							
Start Date		End Date					
3/29/2025		4/4/2025		Search			
Territory Name ↑	03/29/2025	03/30/2025	03/31/2025	04/01/2025	04/02/2025	04/03/2025	04/04/2025
ZIP 10003	2	1	1	1	1	1	1
ZIP 10007	15	7	9	6	6	8	6
ZIP 10013	6	3	3	3	3	3	3

VIVÉ Knowledge Base – Home Delivered Meals

- **Count by Diet Type:**

This view provides a daily count of diet types delivered. This view can be filtered by Start and End dates.

Diet Type	03/29/2025	03/30/2025	03/31/2025	04/01/2025	04/02/2025	04/03/2025	04/04/2025
Box Meal	18	0	0	0	0	0	0
Chilled Regular	0	1	0	0	0	0	0
Frozen Regular	1	0	0	0	0	0	0
Hot Polish	1	0	0	0	0	0	0

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

- **Driver List:** This lists active drivers.

Service Territory	Territory Type	Status
ZIP 10003	ZIP Code	Active
ZIP 10004	ZIP Code	Active
ZIP 10007	ZIP Code	Active
ZIP 10012	ZIP Code	Active

Driver Name	User	Status
Back Up Driver	Alexandra Mena	Active
Back-Up Driver	Back-Up Driver	Active
Driver - Ash	Ash Abbott	Active
Driver - David	David Dring	Active

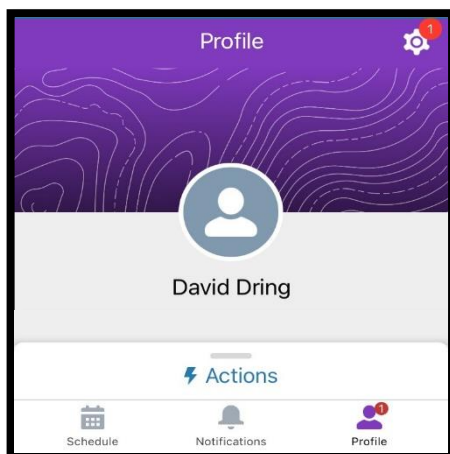
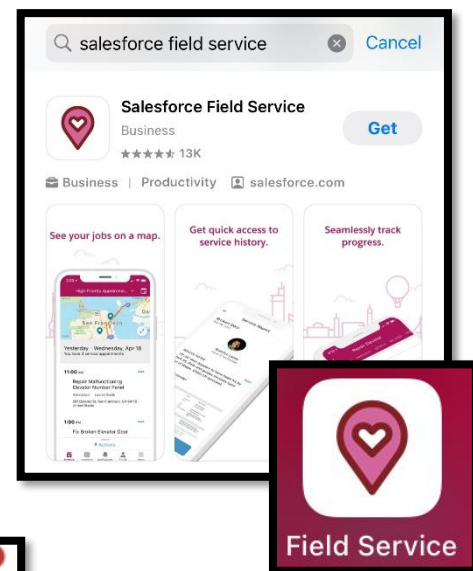
NOTE: Often the More tab displays on the Field Service navigation. Click it to view the dropdown list of other sections.

HDM Driver App

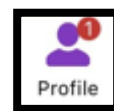
Salesforce, the platform upon which VIVÉ is built, provides an integrated mobile app service called Field Service. VIVÉ uses this service for the HDM app. Field Service is a free app available from either the App Store or Google Play. After setting up the app, you only need to touch the Field Service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



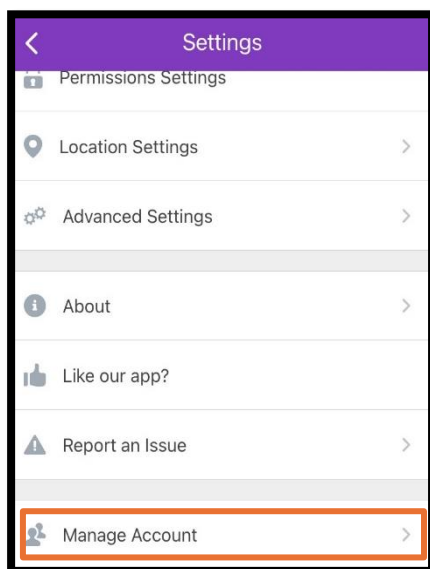
Step 2: From your mobile device, open the Field Service app.



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

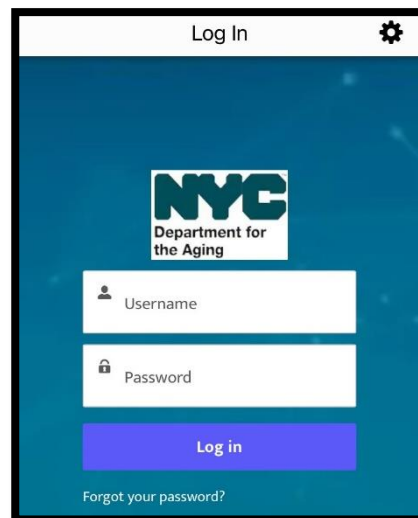
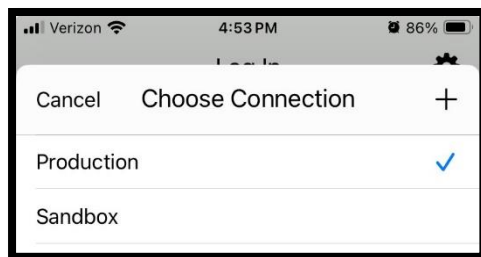
Step 4: From the Profile page, touch the gear in the upper right corner to go to Settings.

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.

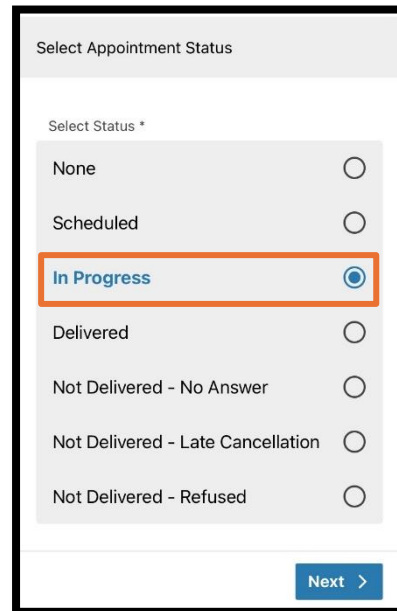
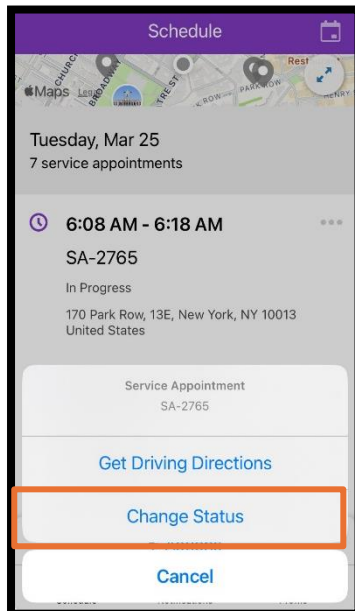
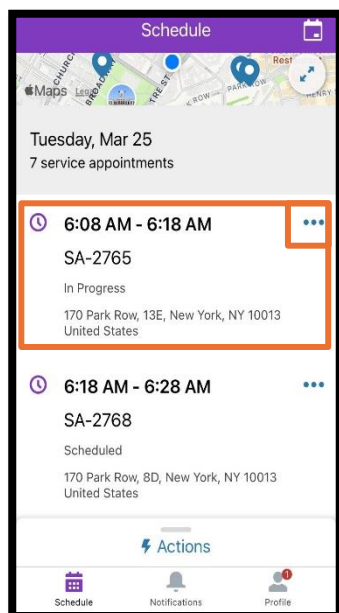
We recommend a three-step process to tracking your meals. The first is indicating that the driver is In Progress to deliver a meal. The second is to change the status to either Delivered or Not Delivered for a particular reason. Then the third indicates that the driver is In Progress to the next delivery.

The Three Step Delivery Tracking Process

Step 1: Mark the delivery In Progress.

VIVÉ Knowledge Base – Home Delivered Meals

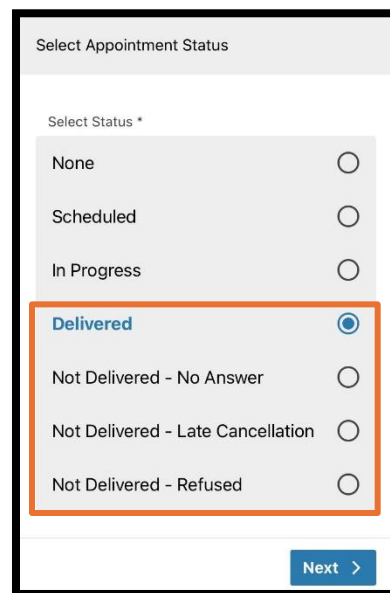
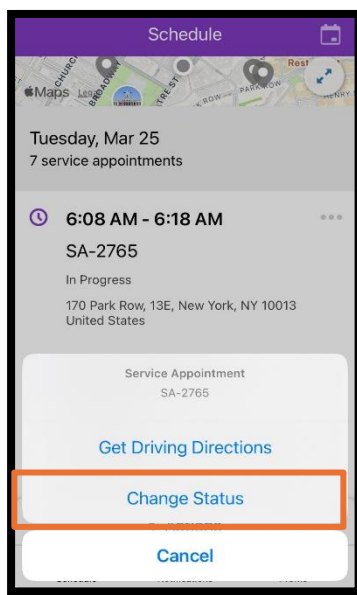
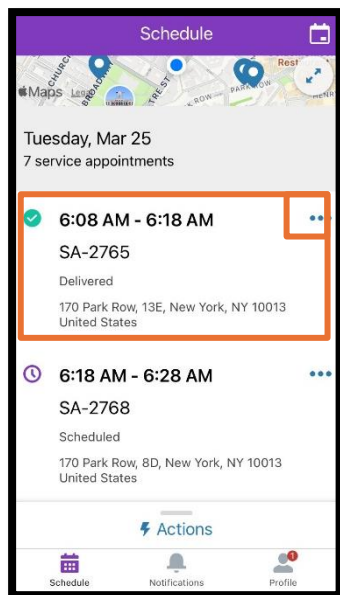
- From the Schedule Page (home page) touch the three dots.



- 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

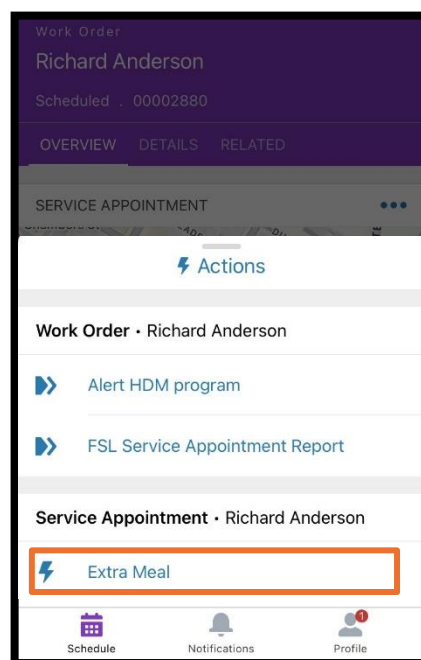
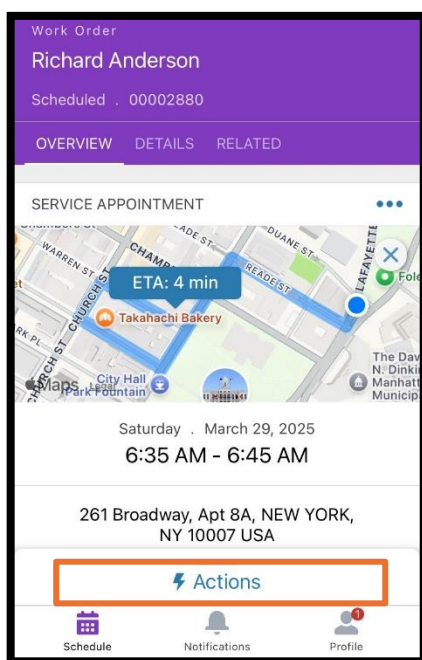
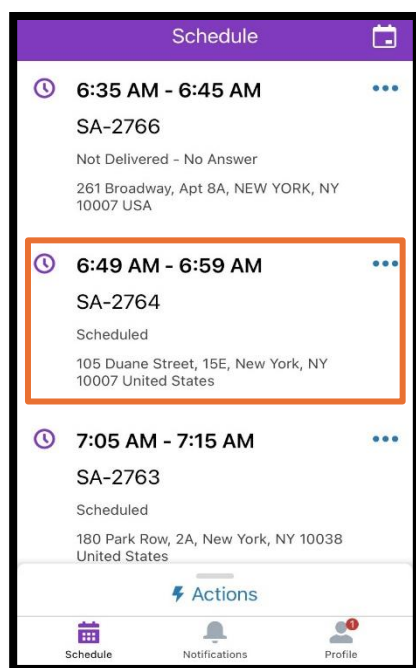
When a delivery is not possible, you can give and track that extra meal as given to another client.

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.



Extra Meal

*Select client to distribute diet

☒ Richard Anderson

Available Meal : Hot Regular -
Quantity : 1

*Quantity

1

Submit

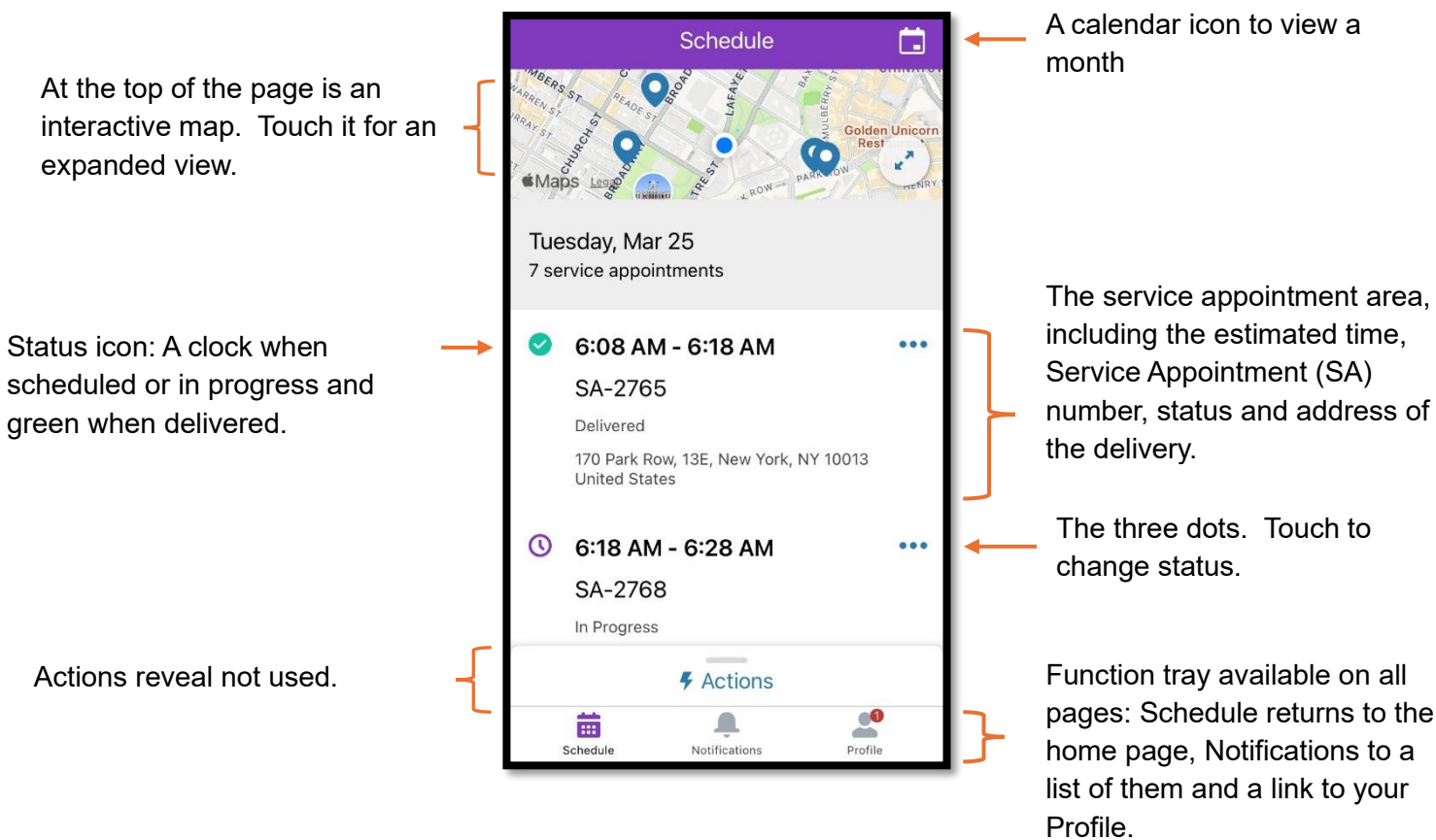
Step 4: Touch to confirm that you will be giving the available meal to this client. Depending upon the available meals, you could offer more than one of the same or different diet types.

Step 5: Select Submit.

Page Legend

There are two primary navigational pages within the HDM App.

Schedule/Home Page



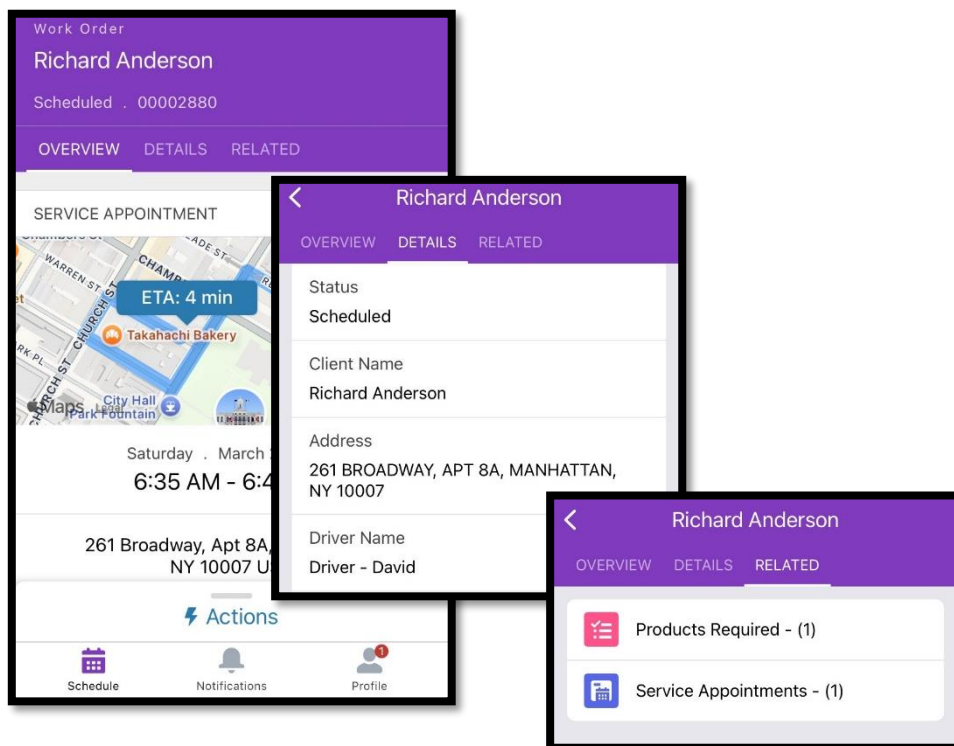
Service Appointment Overview Description

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](#).

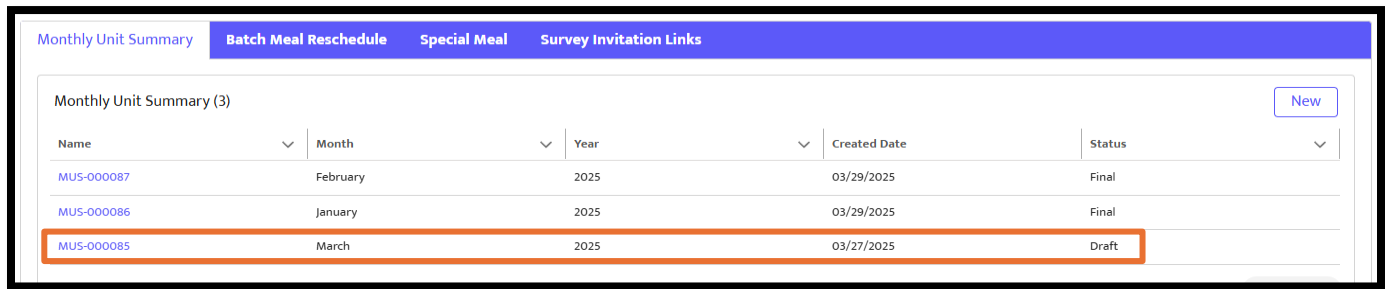


Then contact your Case Management Agency to inform them there is a new client they should assess.

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.



Monthly Unit Summary					Batch Meal Reschedule	Special Meal	Survey Invitation Links
Monthly Unit Summary (3)					New		
Name	Month	Year	Created Date	Status			
MUS-000087	February	2025	03/29/2025	Final			
MUS-000086	January	2025	03/29/2025	Final			
MUS-000085	March	2025	03/27/2025	Draft			

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.

VIVÉ Knowledge Base – Home Delivered Meals

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.

Monthly Unit Summary

* Program

Home Delivered Meals - HENRY STREET - Manhattan 1

* Status

Draft

* Month

March

* Year

2025

Total Cost Center Amount

\$0.00

Recalculate Units

Last Calculated Date: 03/27/2025

Cost Center Allocation

1. City Meals

Cost Amount

\$0.00

Service Types

> 6th Meal	Total Units: 0	Total Amount: \$ 0
> 7th Meal	Total Units: 0	Total Amount: \$ 0

3. Home Delivered Meals

Cost Amount

\$0.00

Service Types

> Weekday	Total Units: 1	Total Amount: \$ 0
> Holiday Meal	Total Units: 0	Total Amount: \$ 0
> Emergency Meal Citymeals Funded	Total Units: 0	Total Amount: \$ 0
> Bulk Move DFTA Funded	Total Units: 0	Total Amount: \$ 0
> Bulk Move Citymeals Funded	Total Units: 0	Total Amount: \$ 0
> Special Meal Box	Total Units: 0	Total Amount: \$ 0
> Eligible Meals	Total Units: 0	Total Amount: \$ 0

Cancel

Save

Finalize

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](#)

The VIVÉ NYC.ID Reference Guide

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

NYC ID are the credentials that allow you to access New York City government's systems and network, such as VIVÉ, which is behind NYC's Firewall. You may be familiar with NYC ID as it is also used to access PASSPort. NYC ID is managed by NYC Office of Technology (OTI) and Innovation, not by NYC Aging.

This guide provides an overview. Specific questions should be made by submitting a ticket to OTI. This guide may also be accessed from the VIVÉ Knowledge Base. At the beginning and end of this document is a link to return to the [VIVÉ Knowledge Base](#). Users can also use their browser's back button to return to the program reference guide.

In this guide you will learn about:

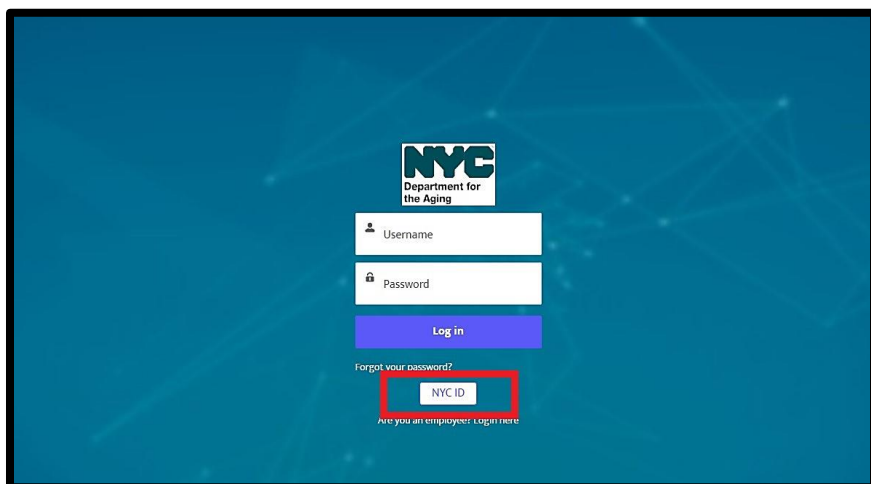
- **Logging into VIVÉ**
- **Accessing NYC.ID**

If you have any questions, please [report an issue](#) to NYC Office of Technology & Innovations.

Logging into VIVÉ

To log into VIVÉ, enter your NYC.ID email or username and your NYC.ID password, then click the Log In button.

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



Accessing NYC.ID

From the VIVÉ login screen, click on the **NYC ID** button or you can access NYC.ID from this [link](#). That link will present the page below. From this page you can:

VIVÉ Knowledge Base – NYCID

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

The Official Website of the City of New York

NYC

Login

Log in using your NYC account

Email Address or Username *

Password *

Login

Log in using one of these options

NYC Employees

Microsoft

Google

LinkedIn

Yahoo

or

[Forgot Password](#)

[Create Account](#)

[Report an Issue](#)

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

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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

[Return to VIVÉ Knowledge Base](#)

The VIVÉ Referral Guide

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

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

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

In this guide you will learn:

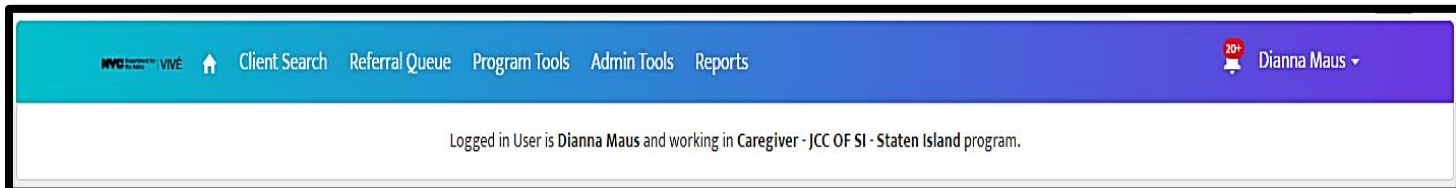
- **Overview of Referrals**
- **Viewing Referrals**
- **Referral Details**
 - Accepting an Enrollment
 - Rejecting an Enrollment
 - Cancelling a Referral
 - Referral Notes
- **Making a Referral**
 - Completing Consent to Refer

Overview of Referrals

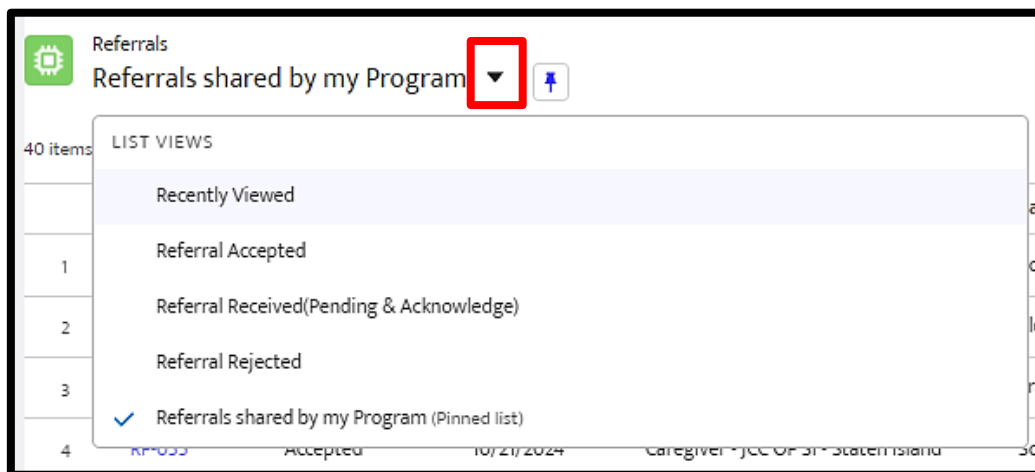
The **Referral Queue** enables users to view and manage referrals. Users are able to refer a client from one NYC Aging program to another. Each program has different places (targets) that they can refer a client. Referrals can be in various states: sent, pending, acknowledged (reviewed by the target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

Viewing Referrals

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



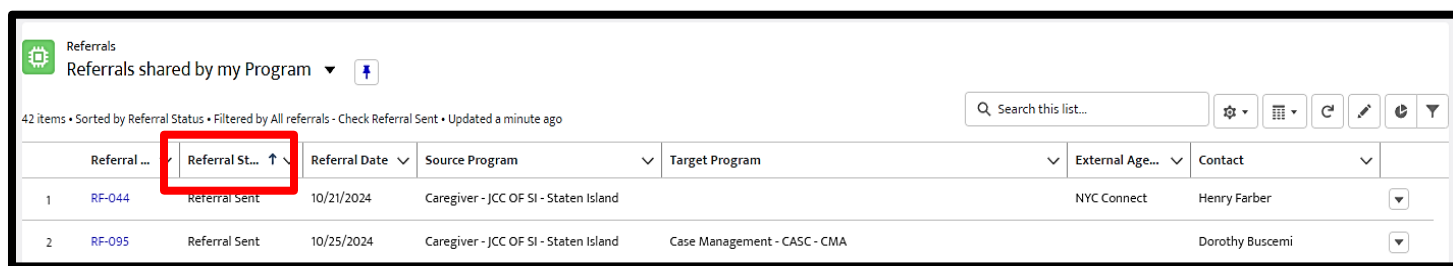
The Referral Queue displays referrals based upon status. You can pin your default view.



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

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

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



Referrals
Referrals shared by my Program

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

Search this list...

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

Referral Details

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

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

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

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

Referral RF-84483

Referral Details Notes

Referral Information

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

Services Requested

Friendly Visiting

System Information

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

Accepting an Enrollment

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

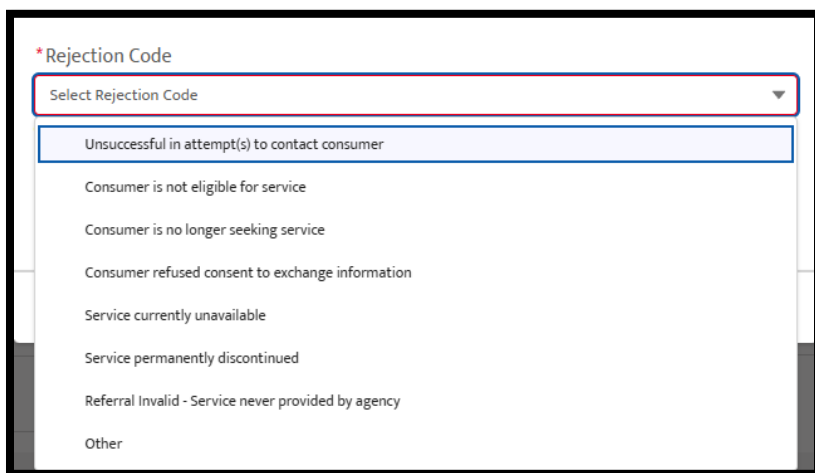
Referral RF-051

Referral Details Notes

Referral Information

Rejecting an Enrollment

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



A screenshot of a web application showing a dropdown menu for "Rejection Code". The dropdown is open, displaying a list of options. The first option, "Unsuccessful in attempt(s) to contact consumer", is highlighted. The other options are: "Consumer is not eligible for service", "Consumer is no longer seeking service", "Consumer refused consent to exchange information", "Service currently unavailable", "Service permanently discontinued", "Referral Invalid - Service never provided by agency", and "Other".

*Rejection Code

Select Rejection Code

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

Cancelling a Referral

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



A screenshot of the "Referral Details" page for referral RF-248. The page has a green icon and the text "Referral RF-248". In the top right corner, there is a red-bordered button labeled "Cancel Referral". Below the header, there are two tabs: "Referral Details" (which is active) and "Notes".

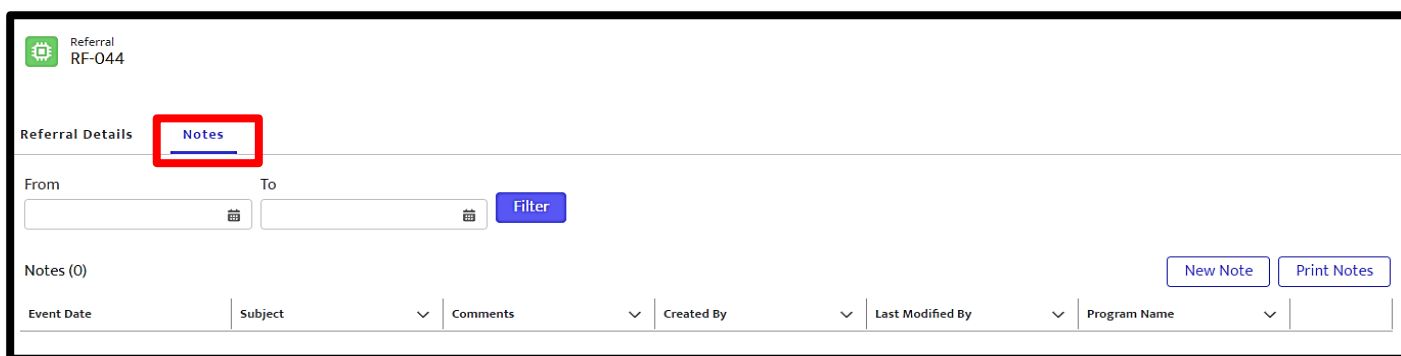
Referral RF-248

Cancel Referral

Referral Details Notes

Referral Notes

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



A screenshot of the "Referral Notes" page for referral RF-044. The page has a green icon and the text "Referral RF-044". Below the header, there are two tabs: "Referral Details" and "Notes" (which is active and highlighted with a red box). Below the tabs, there is a search area with "From" and "To" date pickers and a "Filter" button. Below the search area, there is a "Notes (0)" section with a "New Note" button and a "Print Notes" button. At the bottom, there is a table with columns: "Event Date", "Subject", "Comments", "Created By", "Last Modified By", and "Program Name".

Referral RF-044

Referral Details Notes

From To Filter

Notes (0) New Note Print Notes

Event Date	Subject	Comments	Created By	Last Modified By	Program Name
------------	---------	----------	------------	------------------	--------------

Making a Referral

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

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

VIVÉ Knowledge Base – Referral

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



Name
Janetta Q Shields

[Inactivate Client Profile](#)

Contact Type
Client

Date of Birth
3/23/1935

Phone
(212) 602-4459

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

[Upload Picture](#)

Details

Consents

Contacts

General Comments

Referrals

Enrollments

Unit Entry

Documents

Program History

Profile Update History

Referrals (1)

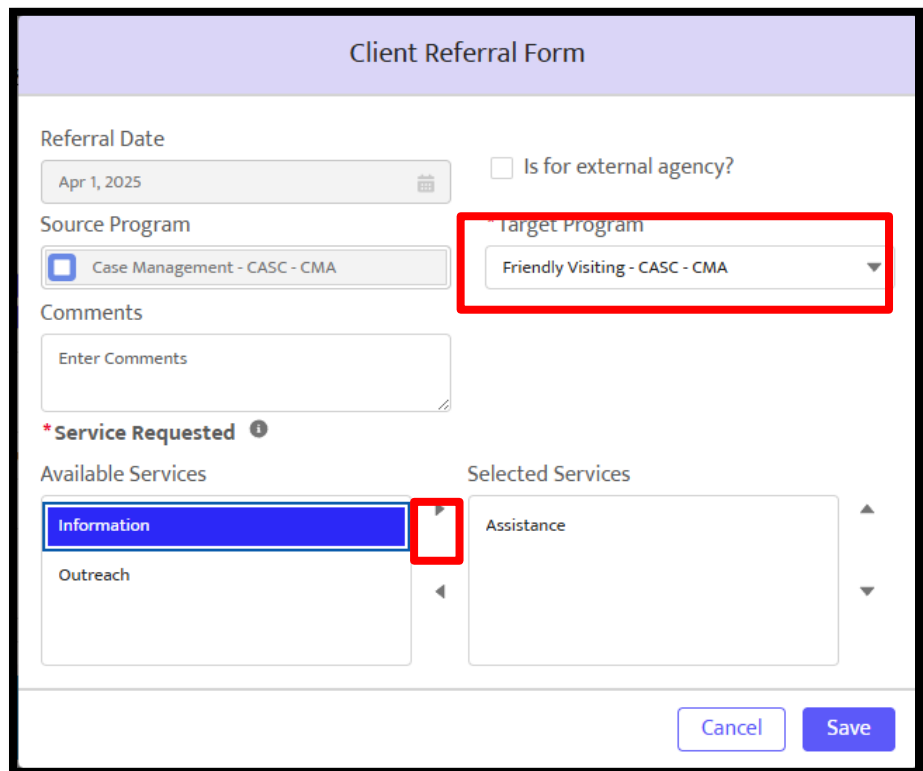
New Referral

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

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

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

Step 5: Select **Save**.



The screenshot shows the 'Client Referral Form' interface. The 'Referral Date' is set to 'Apr 1, 2025'. The 'Source Program' is 'Case Management - CASC - CMA'. The 'Target Program' dropdown is highlighted with a red box and shows 'Friendly Visiting - CASC - CMA'. The 'Comments' field is empty. The 'Service Requested' section shows 'Available Services' with 'Information' and 'Outreach' options. The 'Selected Services' list contains 'Assistance'. At the bottom, there are 'Cancel' and 'Save' buttons.

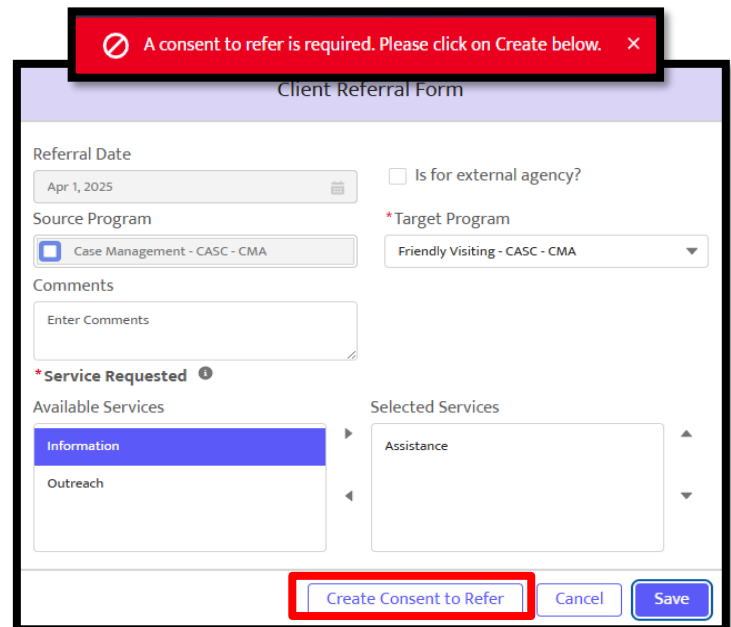
Completing Consent to Refer

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

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

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

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



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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

[Return to VIVÉ Knowledge Base](#)

The VIVÉ Enrollments Reference Guide

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

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

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

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

Overview of Enrollments

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

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

Navigating Enrollments

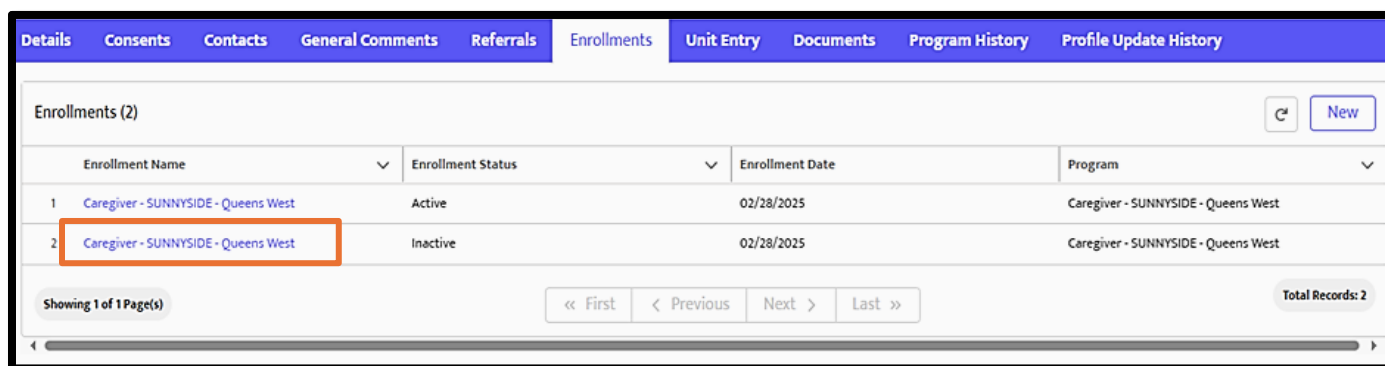
The **Enrollment** menu contains various tabs providing access to capture information about the client and track the work done on their behalf. The default tab on the menu bar will be **Enrollment Details**. Depending on the program type, the status of an enrollment will either default to **Active**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

Determining Client Enrollment

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

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

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



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

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

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

Enrollment
Older Adult Center - BAY RIDGE - Life Long

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

Contact

Assigned To

[test-joe client](#)

Karyn Velez

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

Enrollment Information

Enrollment Name

Older Adult Center - BAY RIDGE - Life Long

Enrollment Status

Active

Creating Enrollments

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

Enrollment
Caregiver - SUNNYSIDE - Queens West

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

Contact

Assigned To

[Maybel Mayweather](#)

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

Enrollment Information

Enrollment Name

Caregiver - SUNNYSIDE - Queens West

Enrollment Status

Active

Enrollment Date

2/19/2025

Program

Caregiver - SUNNYSIDE - Queens West

Referral Information

Linked Referral

Referring Agency Name

Referring Worker Name

On Hold Details

On Hold Start Date

On Hold End Date

On Hold Comments

Enrollment Closing Details

Closing Date

Closing Code

Closing Reason

System Information

Created By

Jamie L Foronda

Last Modified By

Jamie L Foronda

Created Date

2/19/2025, 1:26 PM

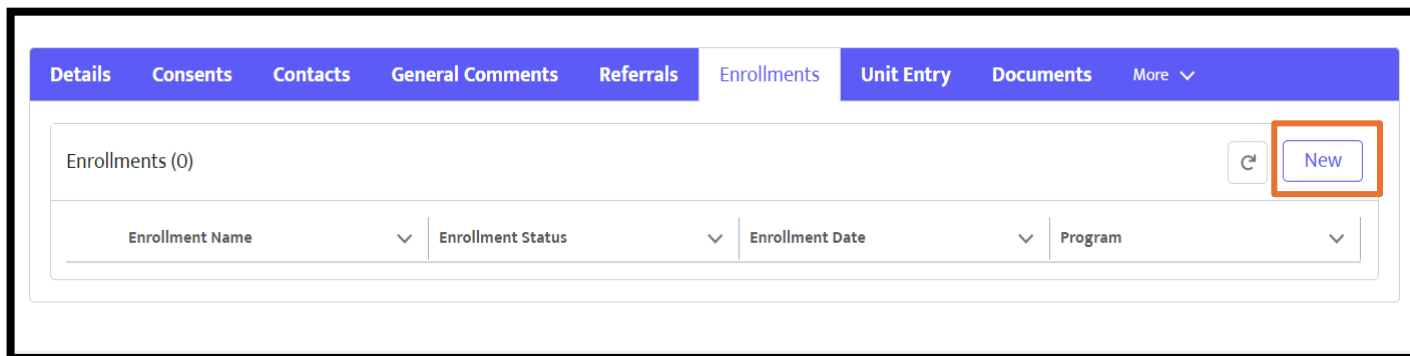
Last Modified Date

2/19/2025, 1:26 PM

[Exit](#)

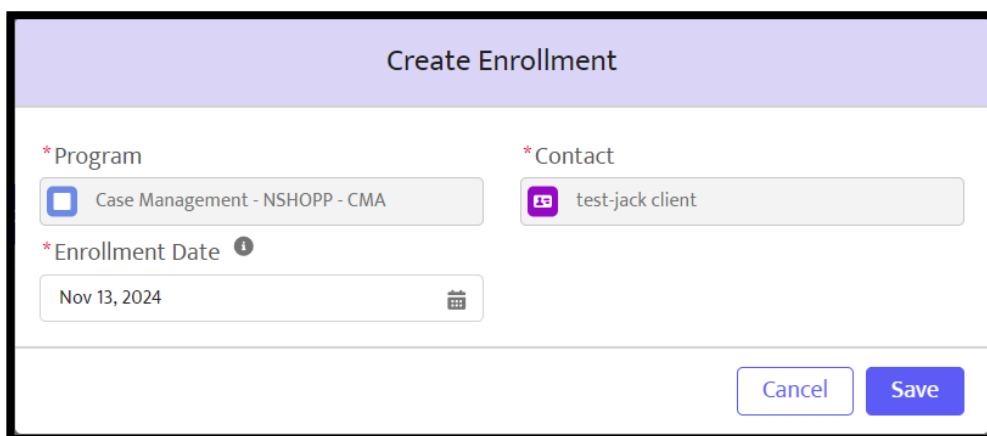
Creating a new client enrollment

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



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
Case Management - NSHOPP - CMA

[Assign Worker](#)
[Approve](#)
[Reject](#)

Contact
testjack.client

Assigned To

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

Enrollment Information	
Enrollment Name Case Management - NSHOPP - CMA	Enrollment Status In Review
Enrollment Date 11/13/2024	Program Case Management - NSHOPP - CMA
Referral Information	
Linked Referral	Referring Agency Name
Referring Worker Name	
On Hold Details	
On Hold Start Date	On Hold End Date
On Hold Comments	
Enrollment Closing Details	
Closing Date	Closing Code
Closing Reason	
System Information	
Created By Karyn Velez	Last Modified By Karyn Velez
Created Date 11/13/2024, 11:12 AM	Last Modified Date 11/13/2024, 11:12 AM

[Exit](#)

Enrollment Details Menu

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

Common features include:

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

Program specific features include:

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

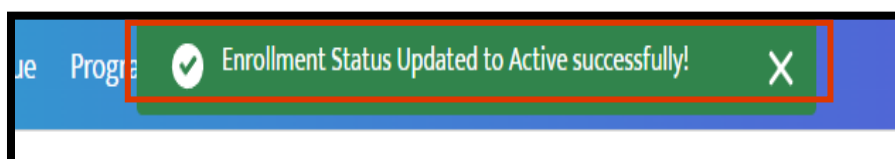
Enrollment: Additional Features

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

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

Approve a Client Enrollment

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



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

Reject Client Enrollment

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

The screenshot shows the 'Enrollment Details' page for 'Case Management - CASC - CMA'. The 'Enrollment' tab is active. The 'Enrollment Status' is 'In Review'. The 'Reject' button is highlighted with a red box. The 'Assign Worker' and 'Approve' buttons are also visible.

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

The screenshot shows the 'Reject the Enrollment' pop-up. The checkbox 'Are you sure you want to reject this enrollment?' is checked. The 'Yes' button is highlighted with a red box.

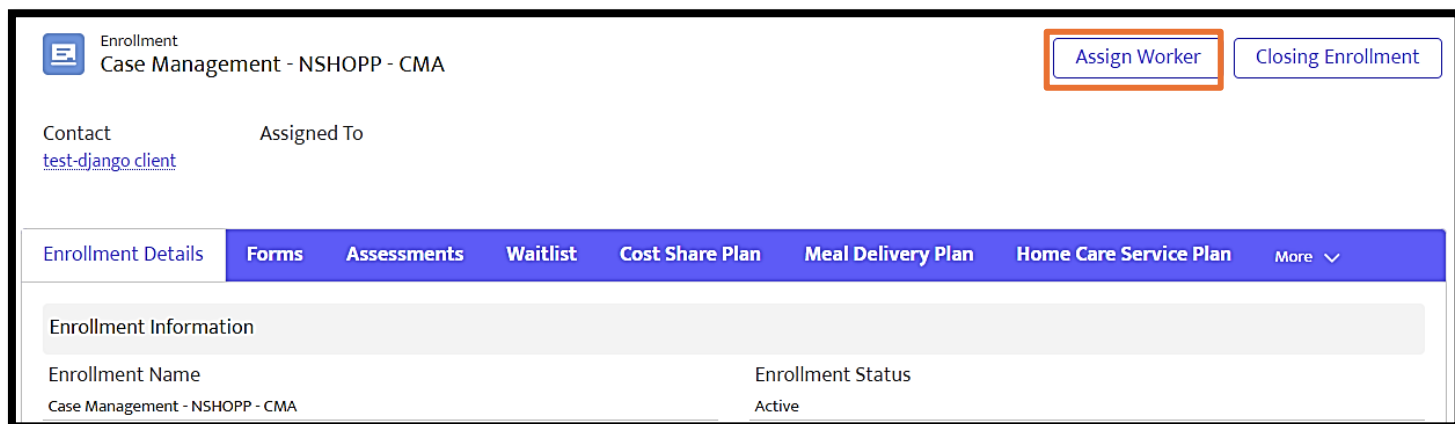
Step 3: Select **Yes**. The **Enrollment Status** will be set to **Inactive** on the **Enrollment Details** page.

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

Assign Worker

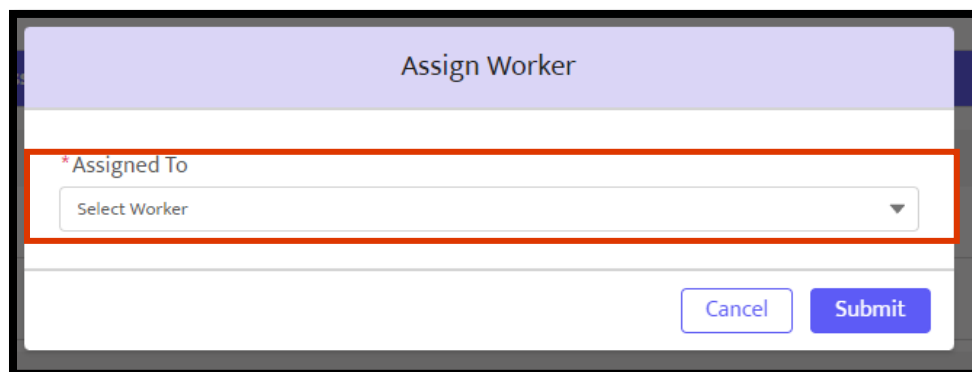
On the **Enrollment Details** screen, the **Assigned To** field will be left blank until a worker is assigned to the client enrollment.

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



The screenshot shows the 'Enrollment Details' screen for 'Case Management - NSHOPP - CMA'. At the top right, there are two buttons: 'Assign Worker' (highlighted with a red box) and 'Closing Enrollment'. Below these, the 'Contact' field shows 'test-django client' and the 'Assigned To' field is empty. A navigation bar contains tabs: 'Enrollment Details', 'Forms', 'Assessments', 'Waitlist', 'Cost Share Plan', 'Meal Delivery Plan', 'Home Care Service Plan', and 'More'. Below the navigation bar, the 'Enrollment Information' section displays 'Enrollment Name: Case Management - NSHOPP - CMA' and 'Enrollment Status: Active'.

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



The screenshot shows the 'Assign Worker' pop-up window. It has a title bar 'Assign Worker'. Below it, there is a dropdown menu labeled '*Assigned To' with the text 'Select Worker' and a downward arrow. At the bottom right, there are two buttons: 'Cancel' and 'Submit'.

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

My Enrollments in Dashboard

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

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

Refresh

My Enrollments

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

View Report (My Enrollments)

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

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

Notifications [Mark all as read](#)

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

Place an Enrollment On Hold

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

Enrollment
Older Adult Center - BAY RIDGE - Life Long

Assign Worker **On Hold** Closing Enrollment

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

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

Enrollment Information

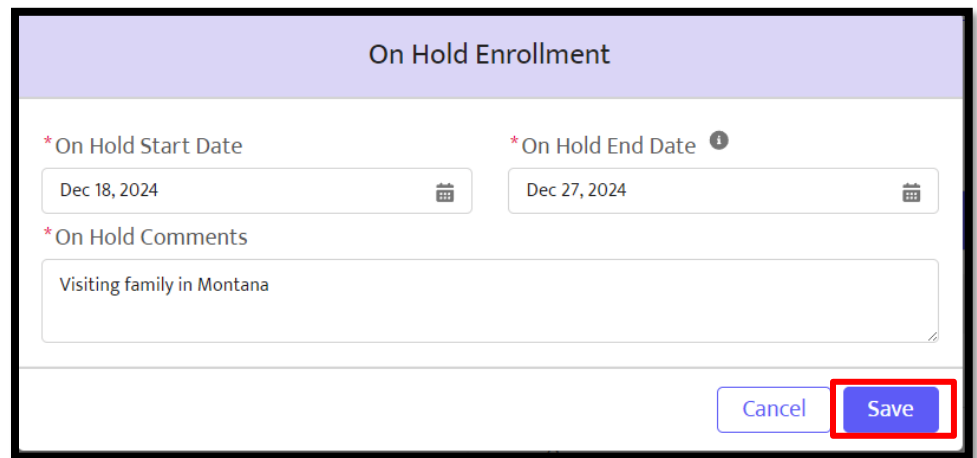
Enrollment Name
Older Adult Center - BAY RIDGE - Life Long

Enrollment Status
Active

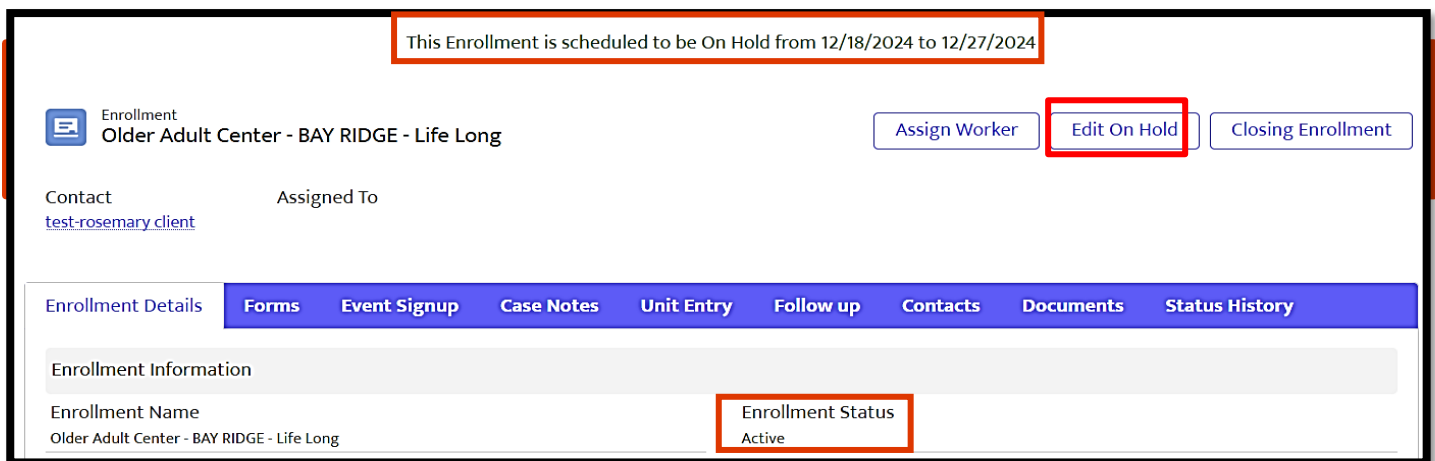
Step 1: Select the **On Hold** button. The **On Hold Enrollment** pop-up will display.

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

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

A screenshot of the 'On Hold Enrollment' form. The form has a purple header with the title 'On Hold Enrollment'. Below the header, there are two date fields: '* On Hold Start Date' with the value 'Dec 18, 2024' and '* On Hold End Date' with the value 'Dec 27, 2024'. Both fields have a calendar icon. Below these is a text area for '* On Hold Comments' with the value 'Visiting family in Montana'. At the bottom right, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red border.

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

A screenshot of the 'Enrollment Details' screen. At the top, a notification bar states 'This Enrollment is scheduled to be On Hold from 12/18/2024 to 12/27/2024'. Below this, the enrollment is identified as 'Older Adult Center - BAY RIDGE - Life Long'. There are three buttons: 'Assign Worker', 'Edit On Hold' (highlighted with a red border), and 'Closing Enrollment'. The 'Contact' is listed as 'test-rosemary.client'. Below this is a tabbed menu with 'Enrollment Details' selected. The 'Enrollment Information' section shows 'Enrollment Name' as 'Older Adult Center - BAY RIDGE - Life Long' and 'Enrollment Status' as 'Active' (highlighted with a red border).

Closing Enrollment

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

Enrollment Case Management - NSHOPP - CMA

Assign Worker Closing Enrollment

Contact Assigned To
test-helen client

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

Enrollment Information

Enrollment Name	Enrollment Status
Case Management - NSHOPP - CMA	Active

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

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

Closing an Enrollment: Past date

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

Closing Enrollment

*Closing Date

*Closing Code

Select Closing Code

*Closing Reason

type Closing Reason here...

Cancel Save

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

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

Enrollment
Case Management - NSHOPP - CMA

This Enrollment was marked Inactive on 12/26/2024

Assign Worker

Contact
test-helen client

Assigned To

Enrollment Details

Forms

Assessments

Waitlist

Cost Share Plan

Meal Delivery Plan

Home Care Service Plan

More ▾

Enrollment Information

Enrollment Name Case Management - NSHOPP - CMA	Enrollment Status Inactive
---	-------------------------------

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

Upload Picture

Name
test-helen client

Inactivate Client Profile

ID
0999001639

Status
Active

Contact Type
Client

Details

Consents

Contacts

General Comments

Referrals

Enrollments

Unit Entry

Program History

More ▾

Program History (3)

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

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

Closing Enrollment: Future Date

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

VIVÉ Knowledge Base – Enrollments

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

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

Enrollment

Case Management - NSHOPP - CMA

Assign Worker

Edit Enrollment Closure

Contact

Assigned To

[test-joy.client](#)

Karyn Velez

Enrollment Details

Forms

Assessments

Waitlist

Cost Share Plan

Meal Delivery Plan

Home Care Service Plan

More ▾

Enrollment Information

Enrollment Name

Case Management - NSHOPP - CMA

Enrollment Status

Active

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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

[Return to VIVÉ Knowledge Base](#)

[Return to VIVÉ Knowledge Base](#)

Using the VIVÉ Client Search Reference Guide

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

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

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

In this guide you will learn:

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

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

Client Search Overview

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

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

Client Search

Beginning Your Client Search

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



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

*** Contact Type**

☒ Client
 ☐ Contact
 ☐ Professional

To begin the client search you can either:

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

*** Contact Type**

☒ Client
 ☐ Contact
 ☐ Professional

First Name

Last Name

Date of Birth

Client ID

Phone

Email

☐ Search by address?

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

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

VIVÉ Knowledge Base – Client Search

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



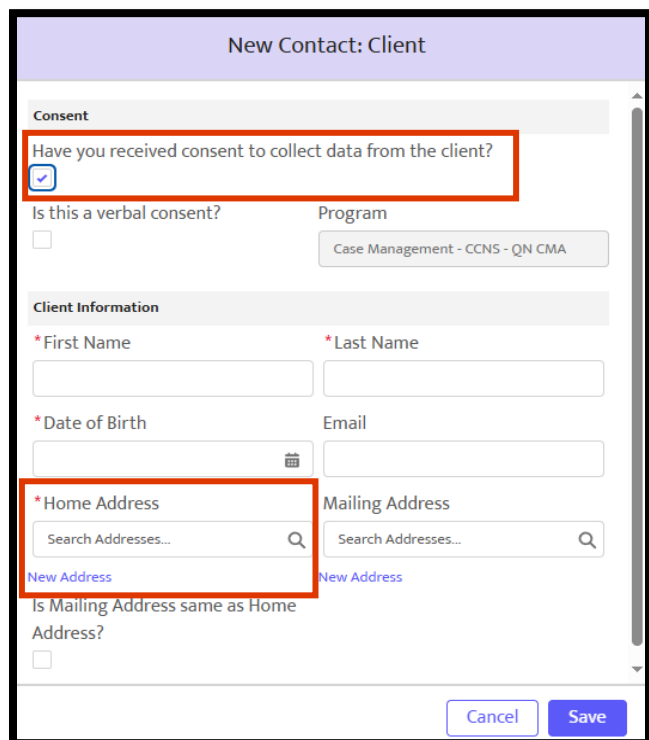
To enable the 'New Client' button, confirm that no matching result was found.

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

New Client

New Client Entry

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



New Contact: Client

Consent

Have you received consent to collect data from the client?

☒

Is this a verbal consent? ☐ Program

Client Information

* First Name * Last Name

* Date of Birth Email

* Home Address Mailing Address

[New Address](#) [New Address](#)

Is Mailing Address same as Home Address? ☐

Cancel Save

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

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

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

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

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

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

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

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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

[Return to VIVÉ Knowledge Base](#)

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**.

Enrollments (1)

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

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

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

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

Follow up Requests (1)

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

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

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

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

Follow-Up Request

*Assigned To
Karyn Velez

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

*Subject
Benefits and Entitlements Questions

Reason
Clarification on Medicaid and SCRIE are requested.

Cancel Submit

Receive a Follow Up Request

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

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

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

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

Edit a Follow Up Request

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

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

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

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

VIVÉ Knowledge Base – Follow Up

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

The screenshot shows a 'Follow up Request' form titled 'Benefits and Entitlements Questions'. In the top right corner, there is a button labeled 'Edit Assigned To'. The form is divided into two columns. The left column contains fields for 'Follow-Up Date' (12/6/2024, 1:30 PM), 'Assigned To' (Karyn Velez), 'Subject' (Benefits and Entitlements Questions), 'Enrollment' (Case Management - NSHOPP - CMA), and 'Created By' (Karyn Velez). The right column contains fields for 'Client Name' (test-maxine client), 'Status' (Open), 'Reason' (Clarification on Medicaid and SCRIE are requested.), and 'Last Modified By' (Karyn Velez). Red boxes highlight the pencil icon next to the 'Assigned To' field, the 'Status' field, and the 'Edit Assigned To' button.

Follow-Up Date 12/6/2024, 1:30 PM	Client Name test-maxine client
Assigned To Karyn Velez	Status Open
Subject Benefits and Entitlements Questions	Reason Clarification on Medicaid and SCRIE are requested.
Enrollment Case Management - NSHOPP - CMA	
Created By Karyn Velez	Last Modified By Karyn Velez

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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

[Return to VIVÉ Knowledge Base](#)

[Return to VIVÉ Knowledge Base](#)

The VIVÉ Unit Entry Reference Guide

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

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

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

In this guide you will learn:

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

Overview of Unit Entry

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

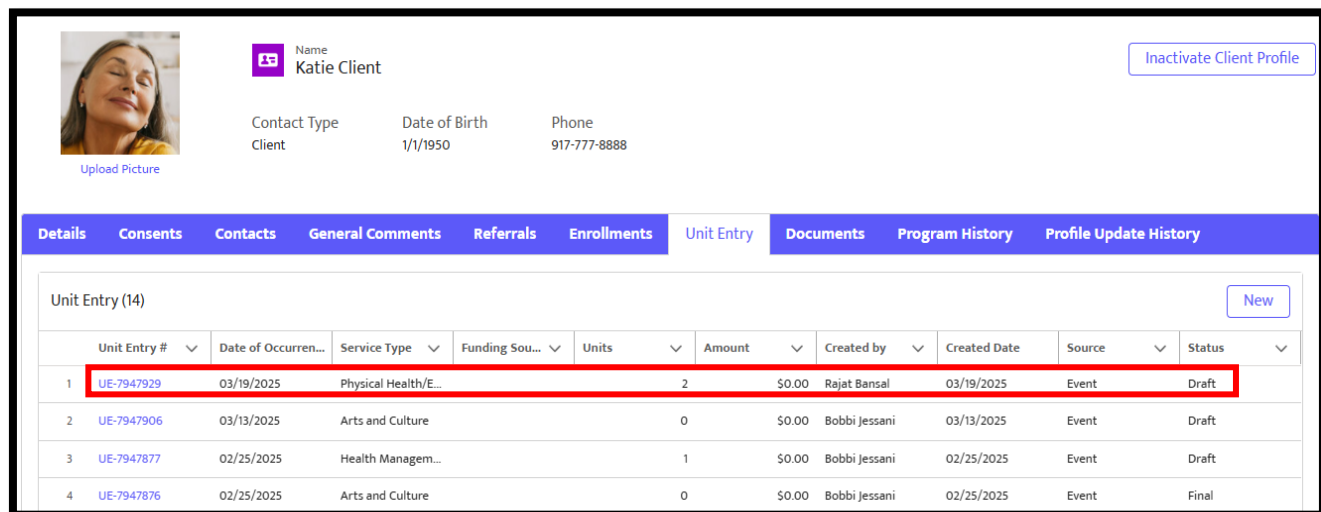
You can enter units in VIVÉ in three places: **Details Menu**, **Enrollment Menu**, or **Program Tools**. For more information on [Events](#).

Editing Existing Units from Details Menu

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

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

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

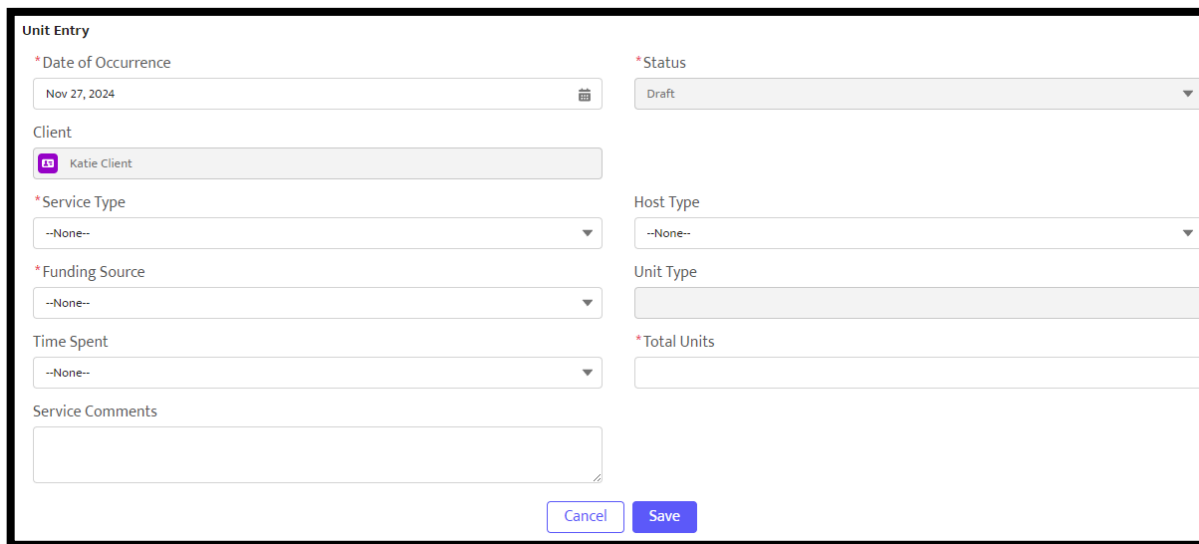


Client Profile for Katie Client. Contact Type: Client, Date of Birth: 1/1/1950, Phone: 917-777-8888. Inactivate Client Profile button is present.

Unit Entry (14)

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

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



Unit Entry

* Date of Occurrence: Nov 27, 2024

* Status: Draft

Client: Katie Client

* Service Type: --None--

Host Type: --None--

* Funding Source: --None--

Unit Type:

Time Spent: --None--

* Total Units:

Service Comments:

Cancel Save

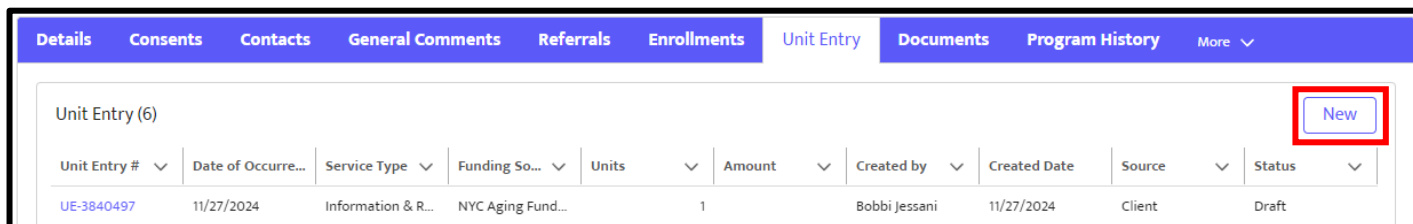
NOTE: Units are in draft status until the Monthly Unit Summary is finalized. More on that below.

Entering Units via the Details Menu

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

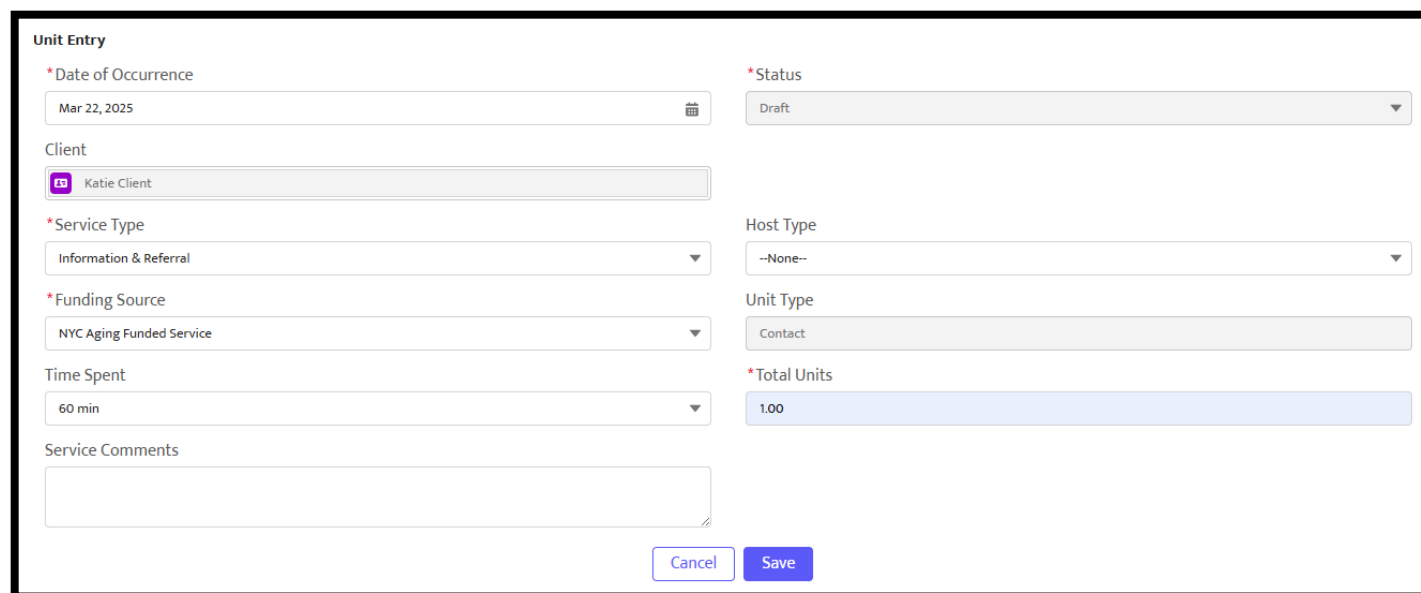
Step 1: From the **Top Menu**, click **Client Search**, and click desired client's name.

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



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

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



Unit Entry

* Date of Occurrence: Mar 22, 2025

* Status: Draft

Client: Katie Client

* Service Type: Information & Referral

Host Type: --None--

* Funding Source: NYC Aging Funded Service

Unit Type: Contact

Time Spent: 60 min

* Total Units: 1.00

Service Comments:

Cancel Save

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

Entering Units from the Enrollment Details Menu

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

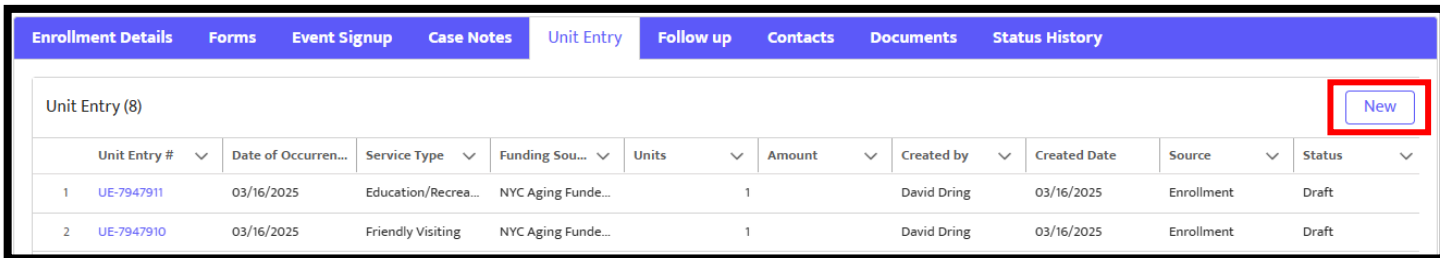
Step 1: From the **Top Menu**, click **Client Search**, and click desired client's name.

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

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

VIVÉ Knowledge Base – Unit Entry

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

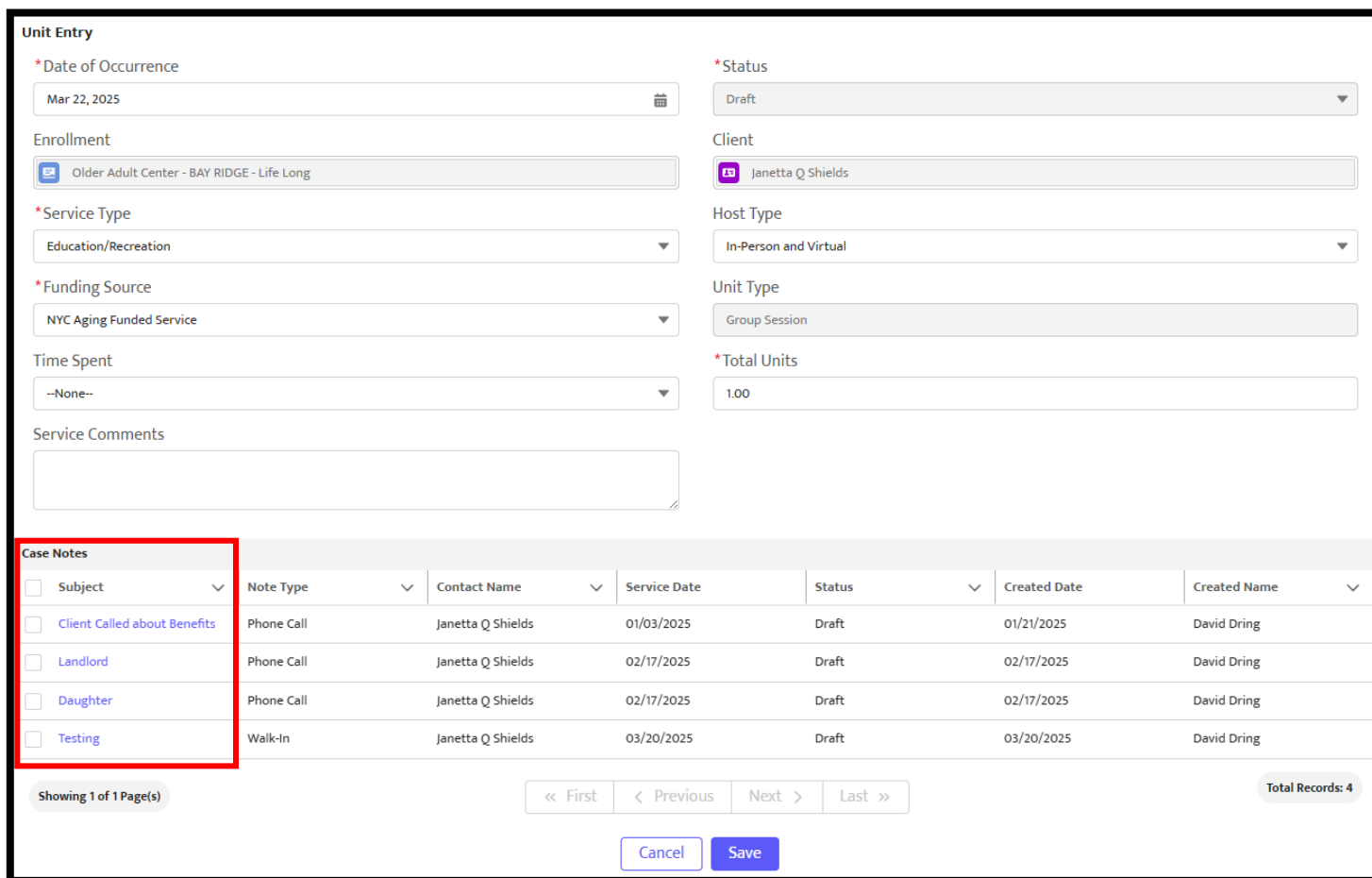


Unit Entry #	Date of Occurrence	Service Type	Funding Source	Units	Amount	Created by	Created Date	Source	Status
1	UE-7947911	03/16/2025	Education/Recreation	NYC Aging Funded Service	1	David Dring	03/16/2025	Enrollment	Draft
2	UE-7947910	03/16/2025	Friendly Visiting	NYC Aging Funded Service	1	David Dring	03/16/2025	Enrollment	Draft

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**.



Unit Entry

* Date of Occurrence: Mar 22, 2025

* Status: Draft

Enrollment: Older Adult Center - BAY RIDGE - Life Long

* Service Type: Education/Recreation

* Client: Janetta Q Shields

* Funding Source: NYC Aging Funded Service

Host Type: In-Person and Virtual

Unit Type: Group Session

Time Spent: --None--

* Total Units: 1.00

Service Comments:

Case Notes

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

Showing 1 of 1 Page(s)

« First < Previous Next > Last »

Cancel Save

Total Records: 4

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

Editing Units from Enrollment Details Menu

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

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

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

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

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

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

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

Step 5:

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

Unit Entry

* Date of Occurrence

Mar 16, 2025

Enrollment

Older Adult Center - BAY RIDGE - Life Long

* Service Type

Education/Recreation

* Funding Source

NYC Aging Funded Service

Time Spent

--None--

Service Comments

* Status

Draft

Client

Janetta Q Shields

Host Type

--None--

Unit Type

Group Session

* Total Units

1.00

Case Notes

☐	Subject	Note Type	Contact Name	Service Date	Status	Created Date	Created Name
☒	Entered intake	Other	Janetta Q Shields	12/18/2024	Final	01/21/2025	David Dring
☐	Client Called about Benefits	Phone Call	Janetta Q Shields	01/03/2025	Draft	01/21/2025	David Dring

Entering Units from Program Tools

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

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

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

Step 3: Click a Event Name link.

The screenshot shows the VIVÉ Program Tools interface. The top navigation bar includes links for Client Search, Referral Queue, Program Tools (highlighted), Admin Tools, and Reports. The user is logged in as Janice Farmer. The main content area shows the Event Profile tab selected, with a sub-menu including Monthly Unit Summary, Scheduled Trips, Drivers/Vehicles List, Activity Tracker, Wellness Volunteer, and Survey Invitation Links. Below the sub-menu is a table of Active Event (50). The first row is highlighted, showing an event named 'Balance Class FY24'.

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

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

The screenshot shows the VIVÉ Unit Entry interface. The top navigation bar includes links for Details, Event Signup, and Unit Entry (highlighted). The main content area shows a table of Unit Entry (4). The first row is highlighted, showing a unit entry with ID UE-7947901. A 'New' button is visible in the top right corner.

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

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

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

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

- 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.

The screenshot shows the 'Unit Entry' details page. At the top, there's a 'Unit Entry' tab. Below it, 'Event Details' include 'Event Profile' (Balance Class FY24), 'Event Location', 'Fee Amount' (\$0.00), 'Participant', and 'Event Manager'. The 'Unit Entry Details' section has a 'Date of Occurrence' field set to 'Mar 10, 2025', a 'Status' dropdown set to 'Draft', and 'Total Units' (2.00) and 'Total \$' (0.00). Below this is a 'Filter & Auto Fill' section with a 'Name' filter, 'Funding Source' dropdown (set to 'None--'), 'Units' (0), 'Amount' (0), and an 'Auto Fill' button. To the right is a 'Select all Attended?' checkbox. At the bottom is a 'Client List' table with columns: Name, Date of Birth, Gender, Home Address, Enrollment Status, Funding Source, Units, Amount, and Attended?. The table lists five clients: Alberto Columbari, Alex Morgan, Alistar Cook, Amy Adams, and Katie Client. Red boxes highlight the 'Unit Entry' tab, the 'Date of Occurrence' field, the 'Auto Fill' button, and the 'Attended?' checkbox in the client list.

Editing an Existing Unit Entry via Program Tools

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

Details	Event Signup	Unit Entry	
Unit Entry (4)			New
Unit Entry #	Date of Occurrence	Service Type	Total Clients
1 UE-7947901	02/14/2025	Physical Health/Ex...	1
2 UE-5349891	02/01/2025	Physical Health/Ex...	2
3 UE-5349890	01/29/2025	Physical Health/Ex...	2

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

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

Entering Units by QR Code Scanning

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

Anonymous Unit Entry

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

Voiding a Unit

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



Cancel Void Unit Save

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

Monthly Unit Summary

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

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

VIVÉ Knowledge Base – Unit Entry

The screenshot shows the VIVÉ Program Tools interface. The top navigation bar includes links for Client Search, Referral Queue, Program Tools (highlighted), Admin Tools, and Reports. The user is logged in as David Dring. The main content area shows the Monthly Unit Summary (5) table. The table has columns for Name, Month, Year, Created Date, and Status. Two entries are listed: MUS-000070 for February 2025 with a Draft status, and MUS-000057 for December 2024 with a Final status. A 'New' button is visible in the top right corner of the table area.

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

Step 2: Click on either a 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.

The screenshot shows the Monthly Unit Summary form for creating a new entry. It includes fields for Program (Older Adult Center - BAY RIDGE - Life Long), Status (Draft), Month (March), and Year (2025). There is a 'Calculate Units' button at the bottom.

Monthly Unit Summary

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

*Status: Draft

*Month: March

*Year: 2025

Total Cost Center Amount

Calculate Units

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

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

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

[Return to VIVÉ Knowledge Base](#)

[Return to VIVÉ Knowledge Base](#)

The VIVÉ Client Profile Reference Guide

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

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

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

In this guide you will learn:

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

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

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

Client Profile Overview

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

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

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

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

Client Profile Overview

Name: Janetta Q Shields Inactivate Client Profile

Contact Type: **Date of Birth:** 3/23/1935 **Phone:** (212) 602-4459

[Upload Picture](#)

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

Basic Demographics | Social Demographics | Emergency Preparedness | Financial | NYSOFA Additional Info

ID: 0000000103 **Status:** Active

***Last Name:** **Suffix:**

***First Name:** **Title:**

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

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

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

Details Tab

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

Sub-Details: Basic Demographics

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

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

Basic Demographics	
ID	Status
0000000103	Active
* Last Name	Suffix
Shields	
* First Name	Title
Janetta	--None--
Middle Initial/Name	Preferred Name
Q	
* Date of Birth	Age
Mar 23, 1935	89
* Home Address	Is Mailing Address same as Home Address?
300 EAST 5TH STREET, MANHATTAN, NY 10003	☒

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



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

Sub-Details: Social Demographics

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

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

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

Sub-Details: Emergency Preparedness

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

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

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

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

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

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

Sub-Details: Financial

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

VIVÉ Knowledge Base – Client Profile

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

The screenshot displays the VIVÉ Client Profile interface. At the top, a navigation bar includes tabs for Details, Consents, Contacts, General Comments, Referrals, Enrollments, Unit Entry, Documents, Program History, and a More dropdown. Below this, a sub-navigation bar highlights the Financial tab, with other options like Basic Demographics, Social Demographics, Emergency Preparedness, and NYSOFA Additional Info. The main content area shows a 'Date' field with 'Dec 20, 2024' and a 'Cancel' button. A dropdown menu is open, titled '* Client agrees to provide financial info?', showing options: --None-- (selected), --None-- (with a checkmark), Yes, and Refuse to provide.

VIVÉ Knowledge Base – Client Profile

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

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

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

The screenshot shows the 'Incomes' tab. A 'New' button is highlighted with an orange box. Below it is a table with 3 rows of income data.

Income ID	Monthly Income Info. compl...	Sources of income	Other source of income def...	Monthly Amount
1 HI-000100	Client	Rental Income		750
2 HI-000099	Client	Interest		500

To Enter Income

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

The 'New Income' pop-up window contains the following fields: 'Monthly Income Info. completed for' (dropdown with '--None--'), 'Sources of income' (dropdown with '--None--'), 'Other source of income defined' (text input), 'Monthly Amount' (text input), and '* Contact' (dropdown with 'Katie Client'). 'Cancel' and 'Save' buttons are at the bottom right.

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**.

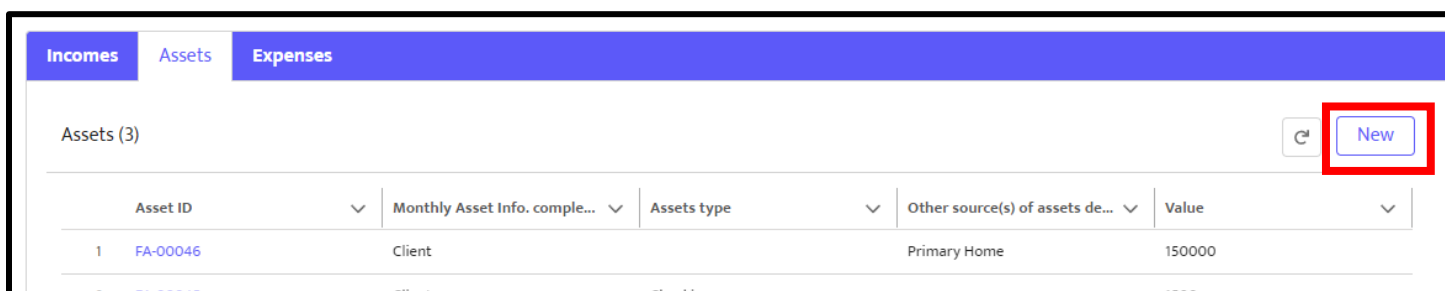
At the top of the page, there is a summary of the household size, total annual income, total assets and total expenses. If you want to see the Poverty Levels chart, click the hyperlink underneath the **Poverty Level PDF** label.

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.

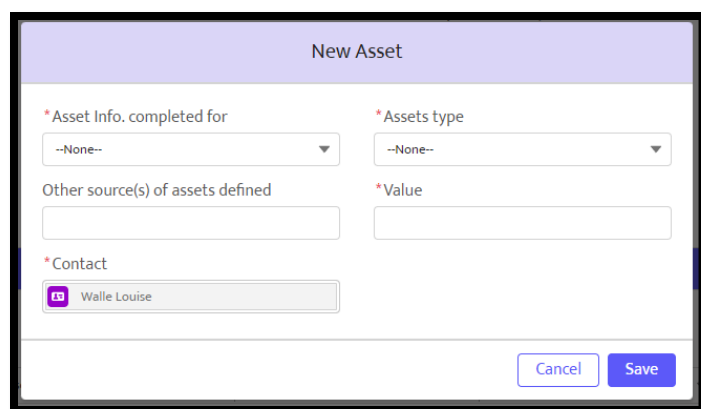
To Enter Assets

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



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

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



The 'New Asset' pop-up form has the following fields:

- * Asset Info. completed for: --None--
- * Assets type: --None--
- Other source(s) of assets defined: (empty text box)
- * Value: (empty text box)
- * Contact: Walle Louise

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

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

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

To Enter Expenses

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

To Delete Financial Information

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

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

Sub-Details: NYSOFA Additional Information

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

New NYSOFA Additional Info

*Date: Nov 29, 2024

*Contact: Katie Client

Client Receiving Eligible Meals

Under 60 Spouse of Eligible Senior: --None--

Disabled Person Living in Senior Housing: --None--

Disabled person lives with client: --None--

HDM for 10 consecutive days or less: --None--

Voter Registration

Initial/Change Date:

Are you a registered voter? Yes

Cancel Save

- When finished select **Save**. This will bring you back to the list view of **NYSOFA** information.

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

General Comments Tab

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

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.

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

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.

VIVÉ Knowledge Base – Client Profile

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

Profile Update History Tab

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

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

Inactivating a Client

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

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

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

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

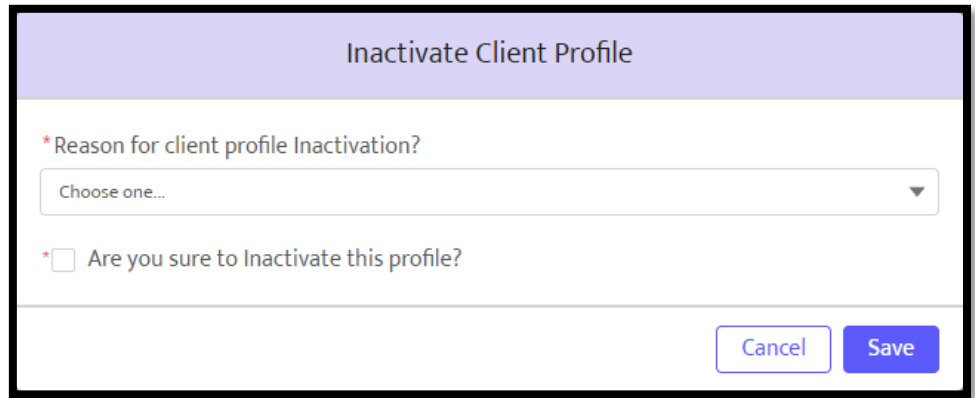
 Upload Picture	 Name Janetta Q Shields	ID 0000000103	Status Active	Contact Type Client	Inactivate Client Profile			
Details	Consents	Contacts	General Comments	Referrals	Enrollments	Documents	Program History	Profile Update History

VIVÉ Knowledge Base – Client Profile

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

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

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

A screenshot of a web form titled "Inactivate Client Profile" with a light purple header. The form contains two main sections. The first section is labeled "* Reason for client profile Inactivation?" and features a dropdown menu with the text "Choose one..." and a downward arrow. The second section is labeled "* ☐ Are you sure to Inactivate this profile?". At the bottom right of the form, there are two buttons: a light blue "Cancel" button and a dark blue "Save" button.

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 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.

Details					
Consents		Contacts	General Comments	Referrals	Enrollments
		Unit Entry	Documents	Program History	Profile Update History
Contact Relationship (4)					
Name Related Contact Relationship Caregiver/Care Receiver Status					
1	CR-263321	Ashley Abbott	Grandmother	Primary Care Receiver	Active

Associating Contacts with Your Client

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

First Check to See if the Contact Already Exists

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

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

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

The screenshot shows the 'Contacts' tab selected in a client's profile. The top navigation bar includes 'Details', 'Consents', 'Contacts', 'General Comments', 'Referrals', 'Enrollments', 'Unit Entry', 'Documents', and 'More'. Below the navigation bar, there is a 'Contact Relationship (14)' section. A 'New' button is highlighted with a red box. Below this, a table lists existing contacts:

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

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

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

The screenshot shows the 'Contact Search' pop-up form. The 'Contact Type' section is highlighted with a red box, showing 'Client' selected. The form includes fields for First Name, Last Name, Phone, Email, and a checkbox for 'Search by address?'. Below this, there are fields for House Number, Street, Borough, City, Apt/Unit, State, ZIP, and Country. A 'Search' button is highlighted with a red box at the bottom left.

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

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

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

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

Confirm Selection

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

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

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

New Contact

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

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

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

New Professional

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

Associating an Existing Client as Your Contact

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

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

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

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

Associating an Existing Contact

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

Associating an Existing Professional

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

Entering in New Contacts

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

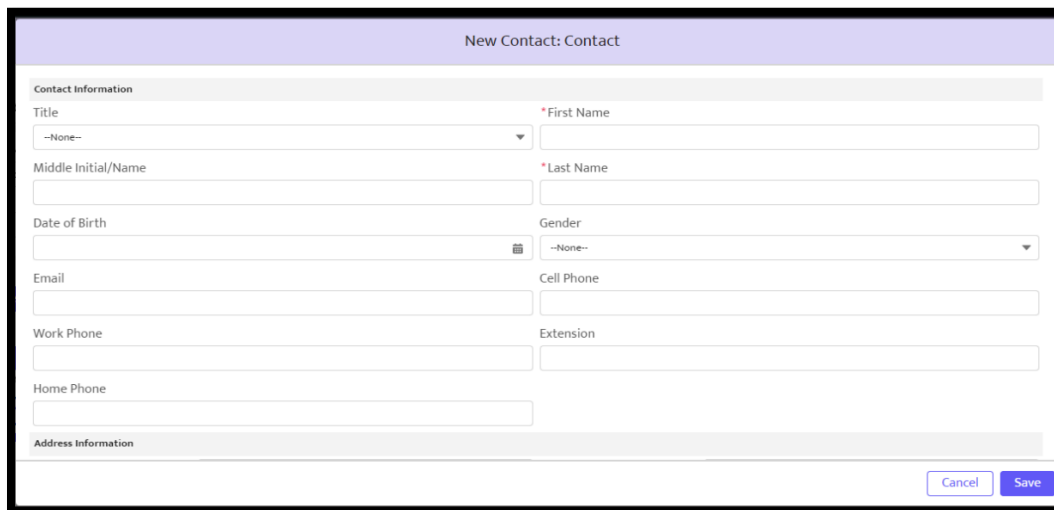
Yes, it can be confusing when talking about a contact type that is contact. We appreciate your understanding.

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

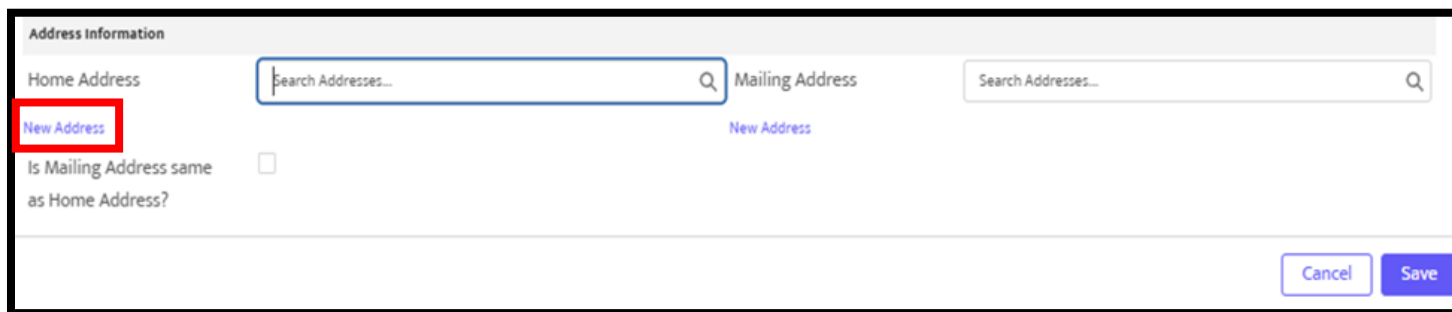
Step 2: While not required, it's best practice to always enter a phone number and an email address.

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

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



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



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

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

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

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

The top screenshot shows the 'New Address' form. It features a search bar with the text '4055 Hylan Boulevard, Stat'. Below the search bar, two address suggestions are listed, each with a location pin icon: '4055 Hylan Boulevard, Staten Island, NY, United States' and '4055 Hylan Place, Staten Island, NY, United States'. The first suggestion is highlighted with a red border. Below the suggestions, the form has fields for *Street (Hylan Boulevard), *State (NY), Borough (Staten Island), *City (Great Kills), and *ZIP (10308).

The bottom screenshot shows the 'New Contact Relationship' form. It has fields for *Client Name (Ann Jane Burnett) and Related Contact (Dolores Konkko). Below these are dropdown menus for 'What is Contact relationship to Client?' (set to --None--), 'Contact Type' (set to --None--), 'Care support type' (set to --None--), and 'This contact' (set to --None--). There is also a *Status dropdown set to Active and a Comments text area. At the bottom right are 'Cancel' and 'Save' buttons.

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.

The screenshot shows the 'New Contact: Professional' form. It has a section for 'Professional Information' with fields for Title (set to --None--), *First Name, Middle Initial/Name, *Last Name, and Position. Below these is the Organization field, which is highlighted with a red border. The Organization field has a search bar with the text 'Search Organizations...' and a magnifying glass icon. At the bottom of the Organization field, there are links: 'New Organization' and 'Populate Organization Details'.

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

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

Organization

Walgreens - Tarrytown

New Organization | Populate Organization Details

Enter a New Organization

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

Organization

Search Organizations...

New Organization | Populate Organization Details

Editing Contacts

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

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

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

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

Exit

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

Inactivating Contacts

Inactivating a contact has the following impact:

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

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

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

VIVÉ Knowledge Base - Contacts

Information

Name

CR-267861

Client Name

[Ann Jane Burnett](#)

What is Contact relationship to Client?

Other

Care support type

Not Applicable

Comments

This is Ms. Burnett's Cardiologist.

Created By

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

Status

Active

Related Contact

[Ginger Whitaker](#)

Contact Type

Primary Care Physician

This contact

Last Modified By

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

Exit

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

[Return to VIVÉ Knowledge Base](#)

[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

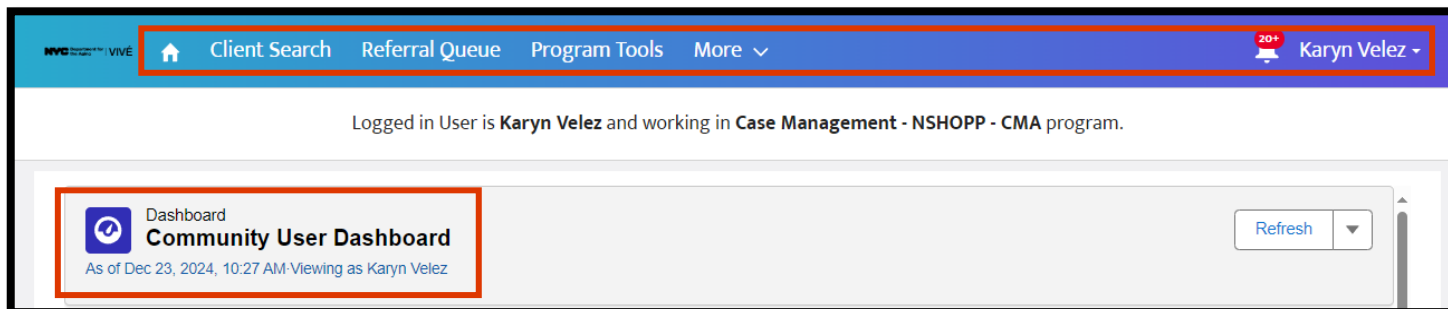
If you have any questions, please contact the **VIVÉ Application Support Center** by submitting a ticket through the **Ticketing Module** under **Program Tools**.

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.

VIVÉ Knowledge Base – Dashboard

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



The Top Menu Navigation

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

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

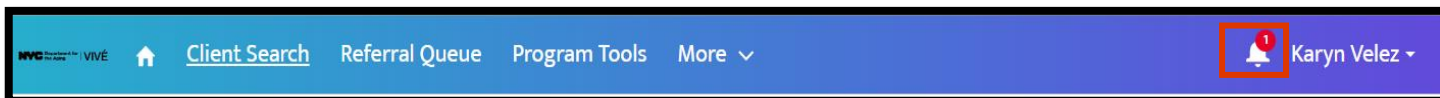


These are the critical links from the **Top Menu**:

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

Notifications

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

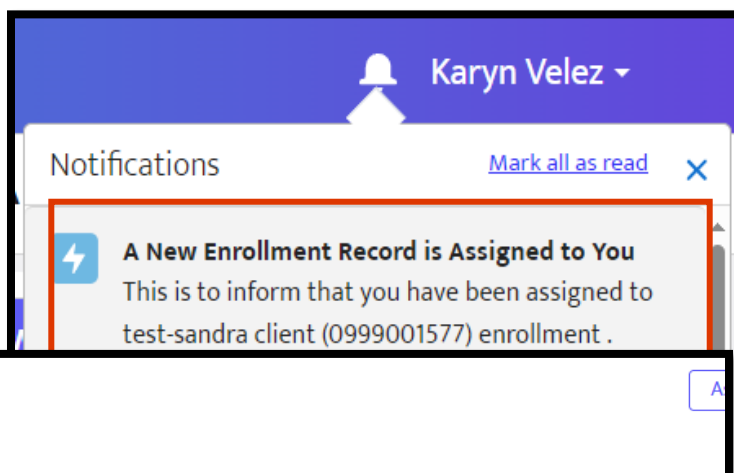


To view and access **Notifications**:

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

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

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



Enrollment

Case Management - NSHOPP - CMA

Contact

Assigned To

test-sandra client

Karyn Velez

Enrollment Details

Forms

Assessments

Waitlist

Cost Share Plan

Meal Delivery Plan

Home Care Service Plan

Friendly Visit Servi

Enrollment Information

Enrollment Name

Case Management - NSHOPP - CMA

Enrollment Status

Active

Enrollment Date

11/6/2024

Program

Case Management - NSHOPP - CMA

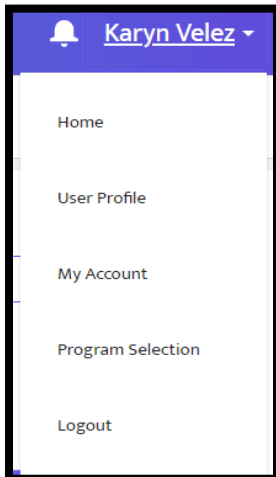
Referral Information

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

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

User Name Profile

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



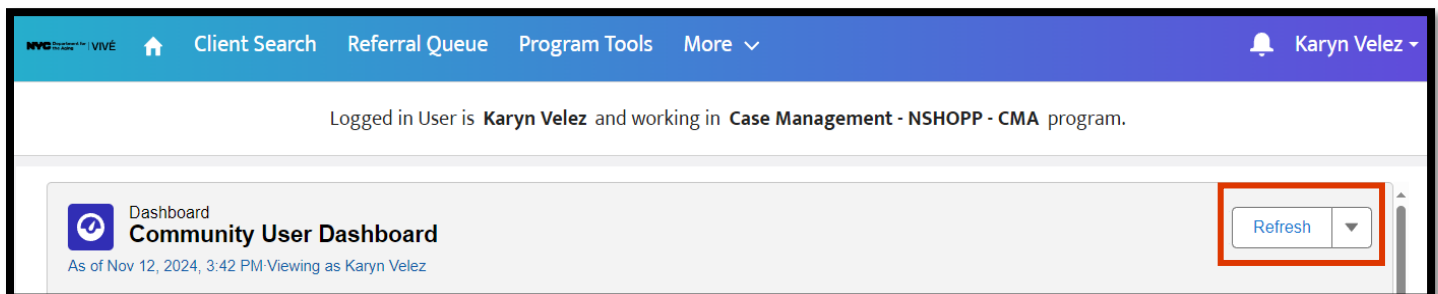
- **Home** – This functionality is used to bring you back to the **Dashboard** from any screen page in VIVÉ.
- **User Profile** – This functionality provides access to information about you including your 1) title, 2) supervisor's name, 3) email address, 4) company name, telephone number and address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

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

Refresh Button

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

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



My Enrollments

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



Dashboard
Community User Dashboard
As of Nov 27, 2024, 2:36 PM Viewing as Karyn Velez

Refresh ▾

My Enrollments

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

View Report (My Enrollments)

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

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

Accessing the Client Profile

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




Name
test-sandra client

Inactivate Client Profile

Upload Picture

ID

0999001577

Status

Active

Contact Type

Client

Details

Consents

Contacts

General Comments

Referrals

Enrollments

Unit Entry

Documents

More ▾

Basic Demographics

Social Demographics

Emergency Preparedness

Financial

NYSOFA Additional Info

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

Accessing Enrollment Menu

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

Contact test-sandra client	Assigned To Karyn Velez
---	----------------------------

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

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

My 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.

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

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

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

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

Follow up Request
Benefit and Entitlement Call

Edit Assigned To

Subject

Benefit and Entitlement Call

Reason

Client interested in applying for certain programs.

Status

Open

Created By

Karyn Velez

Assigned To

Karyn Velez

Follow-Up Date

11/11/2024, 1:00 PM

Enrollment

Case Management - NSHOPP - CMA

Last Modified By

Karyn Velez

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

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

My Tasks

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

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

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

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

Accessing the Task Details

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

My Tasks

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

View Report (My Tasks)

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

Task T-00002

Details

Task Number

T-00002

Task Status

Open

Priority

Normal

Did you Speak with the client ?

Created Date

12/18/2024, 1:11 PM

Last Modified By

Tej Kum

Subject

Client Re-assessment

Assessment

[AS-00072](#)

Actions

Program

Case Management - NSHOPP - CMA

Last Modified Date

12/18/2024, 1:11 PM

Exit

VIVÉ Knowledge Base – Dashboard

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

Task
T-00002

Details

* = Required Information

Task Number
T-00002

Task Status
Closed

Priority
Normal

Did you Speak with the client ?
Yes

Created Date
12/18/2024, 1:11 PM

Last Modified By
Tej Kum

Subject
Client Re-assessment

Assessment
AS-00072

* Actions
Re-Assessment completed

Program
Case Management - NSHOPP - CMA

Last Modified Date
12/18/2024, 1:11 PM

Cancel Save

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

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

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[Return to VIVÉ Knowledge Base](#)

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The VIVÉ Documents Reference Guide

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

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

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

In this guide you will learn:

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

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

Overview of Documents

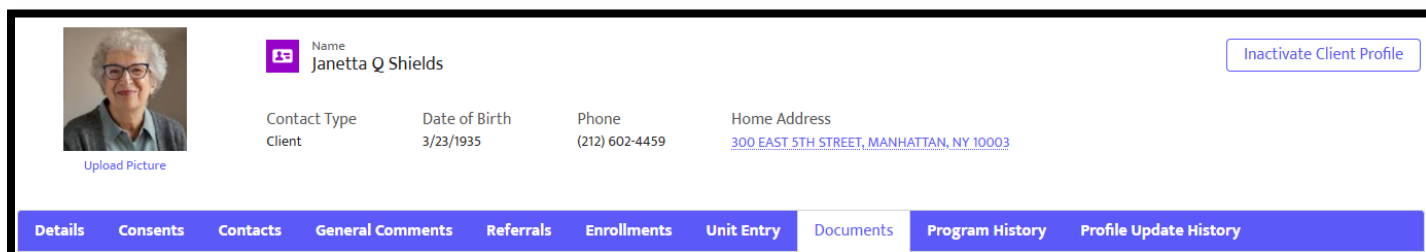
Documents featured in VIVÉ provides the ability for you to add, edit, and view a record of various document types associated with a client's file by uploading them into the database.

Navigating to Documents

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

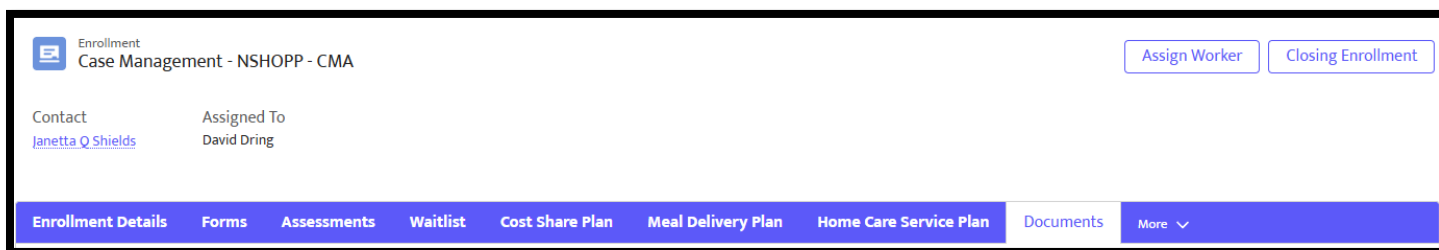
Step 1: Click **Documents** tab from **Details Menu: Client Profile** or **Enrollment Details Menu**.

Details Menu: Client Profile



The screenshot shows the 'Details Menu: Client Profile' for Janetta Q Shields. The 'Documents' tab is selected in the navigation bar. The client's information is displayed at the top, including a photo, name, contact type, date of birth, phone, and home address. The navigation bar includes tabs for Details, Consents, Contacts, General Comments, Referrals, Enrollments, Unit Entry, Documents (selected), Program History, and Profile Update History.

Enrollment Details Menu



The screenshot shows the 'Enrollment Details Menu' for Case Management - NSHOPP - CMA. The 'Documents' tab is selected in the navigation bar. The enrollment information is displayed at the top, including a document icon, enrollment name, contact, and assigned worker. The navigation bar includes tabs for Enrollment Details, Forms, Assessments, Waitlist, Cost Share Plan, Meal Delivery Plan, Home Care Service Plan, Documents (selected), and More.

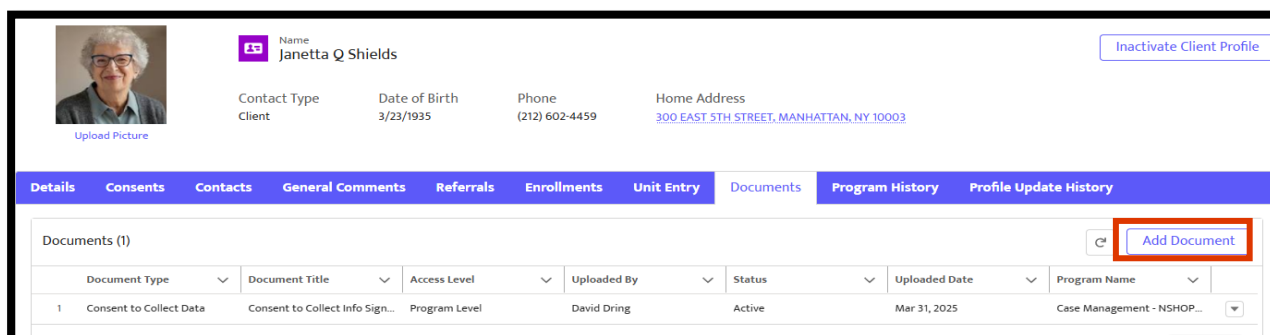
Adding Documents

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.



The screenshot shows the 'Documents' list view for Janetta Q Shields. The 'Add Document' button is highlighted with a red box. The list view displays a table of documents with columns for Document Type, Document Title, Access Level, Uploaded By, Status, Uploaded Date, and Program Name. A single document is listed: 'Consent to Collect Data' by David Dring, uploaded on Mar 31, 2025.

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

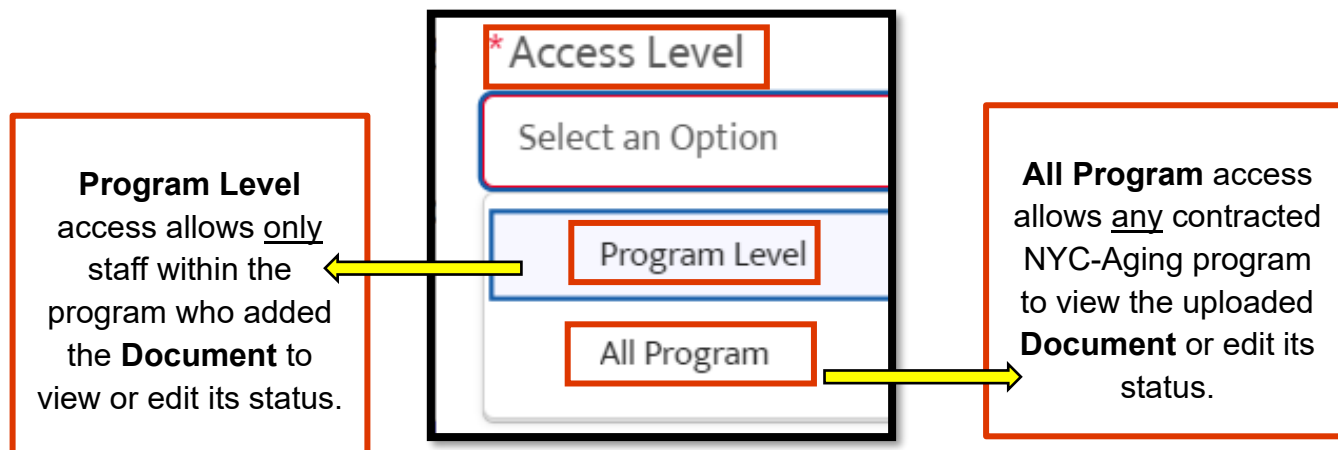
Step 4: On the **Add Document** pop-up, complete the required fields of **Document Type**, **Access Level** and **Document Title**. The **Status** field will automatically default to the status of **Active**. If needed, provide a **Description** of the documentation.

Access Level

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

The screenshot shows the 'Add Document' form with the following fields: 'Document Type' (Legal Document), 'Access Level' (Program Level), 'Document Title' (POA-test-hope-11-2024), 'Status' (Active), 'Description' (Copy of POA for Medicaid application), and 'Upload Document' (POA-test-hope_11-2024.pdf). The 'Access Level' dropdown is highlighted with a red box.

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.

Details

Consents

Contacts

General Comments

Referrals

Enrollments

Unit Entry

Documents

Program History

Profile Update History

Documents (2)

Add Document

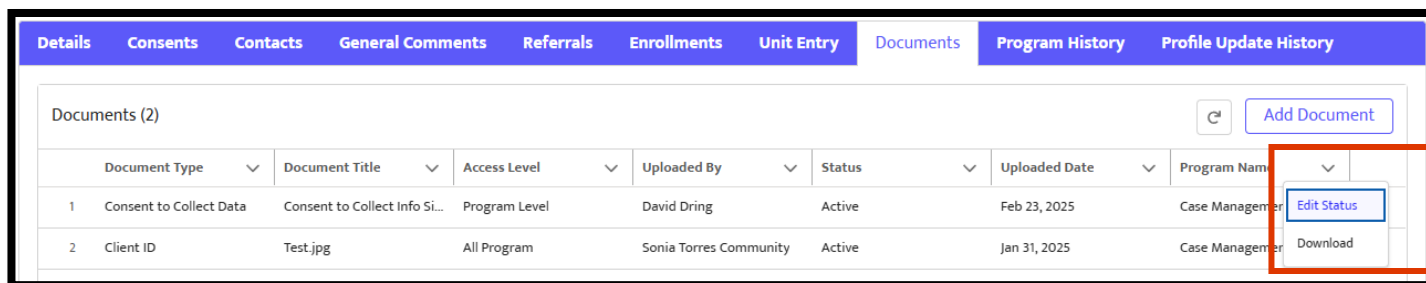
	Document Type	Document Title	Access Level	Uploaded By	Status	Uploaded Date	Program Name	
1	Consent to Collect Data	Consent to Collect Info Si...	Program Level	David Dring	Active	Feb 23, 2025	Case Manager	Edit Status
2	Client ID	Test.jpg	All Program	Sonia Torres Community	Active	Jan 31, 2025	Case Manager	Download

Edit Document Status

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

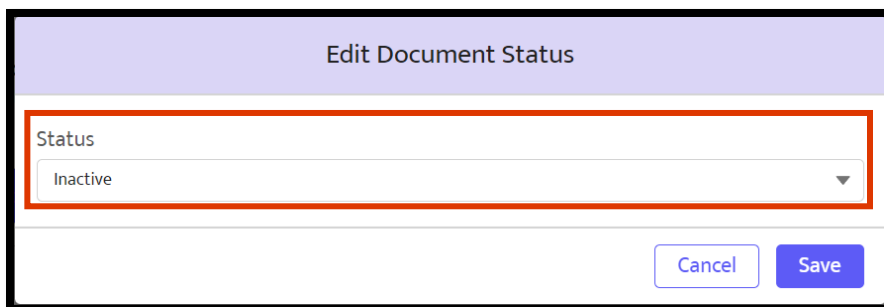
VIVÉ Knowledge Base - Documents

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



Documents (2)								 Add Document	
Document Type	Document Title	Access Level	Uploaded By	Status	Uploaded Date	Program Name			
1	Consent to Collect Data	Consent to Collect Info Si...	Program Level	David Dring	Active	Feb 23, 2025	Case Manager	Edit Status	Download
2	Client ID	Test.jpg	All Program	Sonia Torres Community	Active	Jan 31, 2025	Case Manager		

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



Edit Document Status

Status

Inactive

[Cancel](#) [Save](#)

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

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

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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 administering their drivers, is not described here; only within their Program Guide.

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

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

In this guide you will learn:

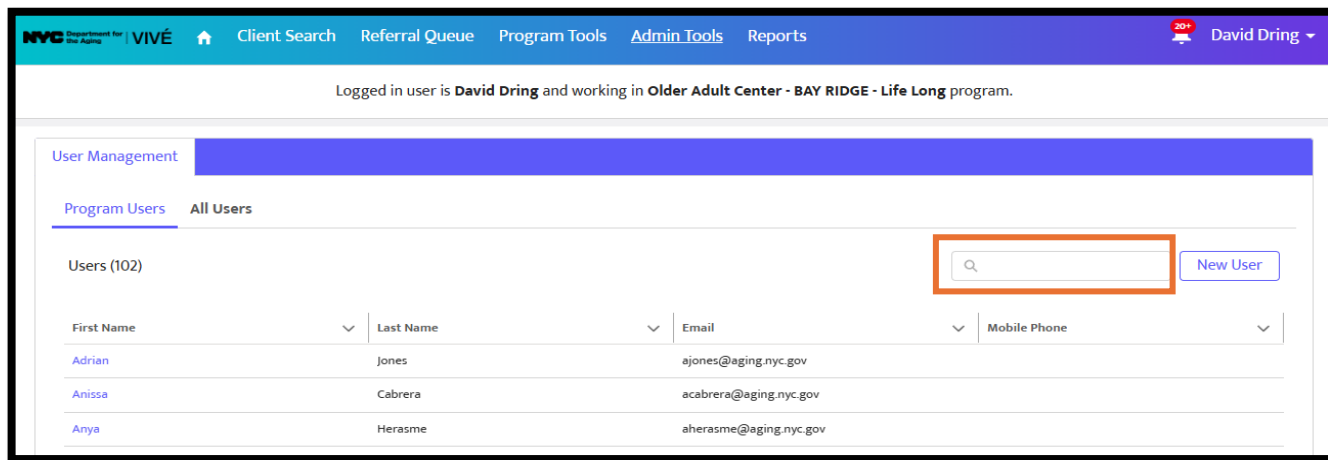
- **Accessing Admin Tools**
- **Viewing Users**
 - Searching for Users
- **Creating a New User**
- **Editing a User**
 - Editing Basic Information
 - Editing User Roles with Program Associations
- **Inactivating a User from a Program Association**

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

Accessing Admin Tools

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

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



NYC Department for the Aging | VIVÉ

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

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

User Management

Program Users **All Users**

Users (102)

Search [] New User

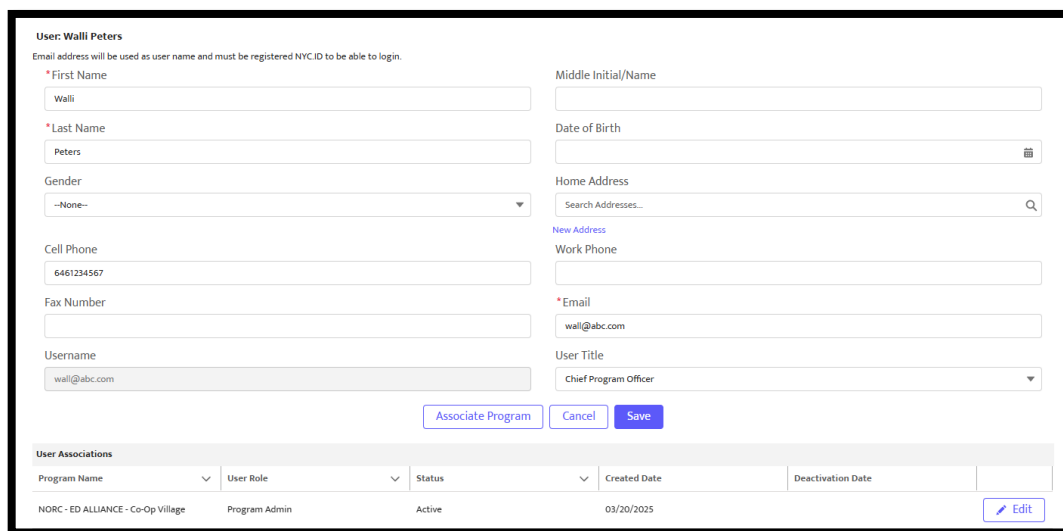
First Name	Last Name	Email	Mobile Phone
Adrian	Jones	ajones@aging.nyc.gov	
Anissa	Cabrera	acabrera@aging.nyc.gov	
Anyia	Herasme	aherasme@aging.nyc.gov	

Viewing Users

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

Searching for Users

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



User: Walli Peters

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

* First Name: Walli

* Last Name: Peters

Gender: --None--

Cell Phone: 6461234567

Fax Number:

Username: wall@abc.com

Middle Initial/Name:

Date of Birth:

Home Address: Search Addresses...

New Address:

Work Phone:

* Email: wall@abc.com

User Title: Chief Program Officer

Associate Program Cancel Save

User Associations

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

Edit

Creating a New User

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

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

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

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

There are four User Roles:

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

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

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

Editing a User

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

Editing Basic Information

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

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

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

Editing User Roles with Program Associations

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

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

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

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

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

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

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

*First Name: Walli
*Last Name: Peters
Gender: --None--
Cell Phone: 6461234567
Fax Number:
Username: wall@abc.com
Middle Initial/Name:
Date of Birth:
Home Address: Search Addresses...
Work Phone:
*Email: wall@abc.com
User Title: Chief Program Officer

Associate Program Cancel Save

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

User Association

*Program: Older Adult Center - BAY RIDGE - Life Long
*User Role: Program Staff
*Status: Active

Cancel Save

Inactivating a User from a Program Association

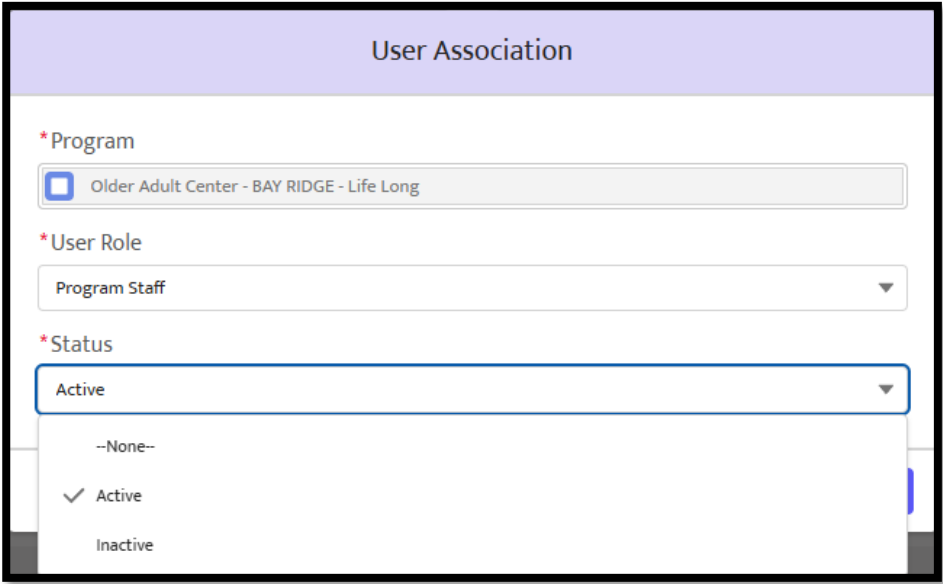
While users are never deleted from the system, they are inactivated from a program. In this way, they can be reactivated with another program later.

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

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

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

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



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

- * Program:** A text input field containing "Older Adult Center - BAY RIDGE - Life Long".
- * User Role:** A dropdown menu with "Program Staff" selected.
- * Status:** A dropdown menu with "Active" selected. The dropdown is open, showing three options: "--None--", "✓ Active", and "Inactive".

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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**.

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