

## Using the VIVÉ Home Care Programs Reference Guide

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VIVÉ is a customized client management system designed by NYC Aging. This system supports NYC Aging contractors in managing their client interactions and reporting on services provided. This reference guide provides instructions on using the Home Care module of VIVÉ. Follow the links below to access sections of this document or external references.

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

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

In this guide you will learn how to:

- **Home Care Flow Chart: Initial Service**
- **Referral Queue**
  - Reviewing a New Client Referral
  - Acknowledging a Client Referral
  - Accepting a Client Referral
  - Rejecting a Client Referral
  - Referral Notes
- **Enrollment**
  - Enrolling a New Client
  - Assigning a Client Enrollment to a Worker
- **Home Care Assessment**
  - Creating a Home Assessment
  - Editing/Updating a Home Assessment
  - Cloning an Assessment
- **HC Consolidated Task List**
  - Creating a HC Consolidated Task List
  - Editing a HC Consolidated Task List
- **Home Care Service Plan (Start Date)**
- **Case Notes**
- **Home Care Flow Chart: Client Service Updates**
  - On Hold
  - Service Hour Changes
  - Cost Share Changes

## *VIVÉ Knowledge Base – Home Care Programs*

- Terminating Services
- Confirming Service Termination
- **Managing Home Care Service Units**
  - Creating a New Service Type: Event
  - Entering Home Care Units of Service
- **Monthly Service Unit Reporting**

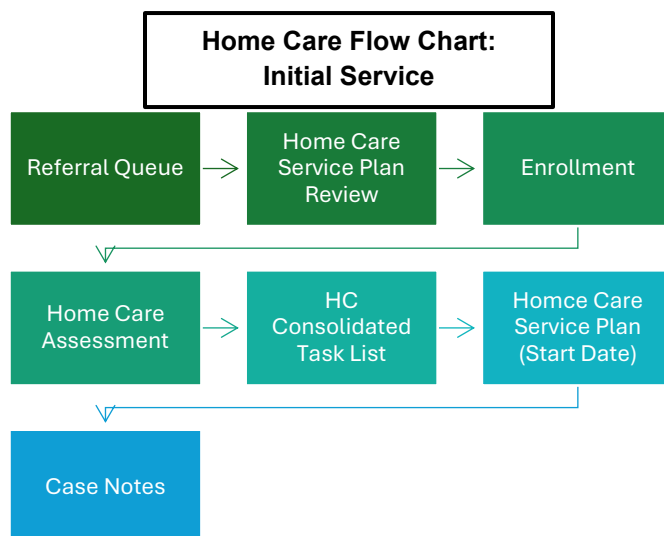
**In addition to these program specific instructions, there are the following common guides:**

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

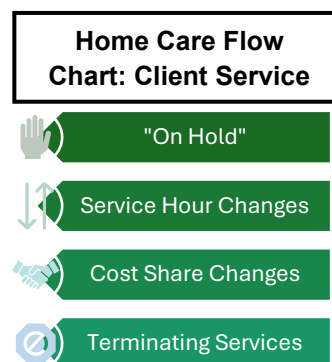
## VIVÉ: Home Care Flow Diagrams

The following flow diagrams illustrate the navigation processes for key aspects of your work. These diagrams provide a general overview of the steps involved in completing key tasks, while also showcasing the various sections of the VIVÉ database.

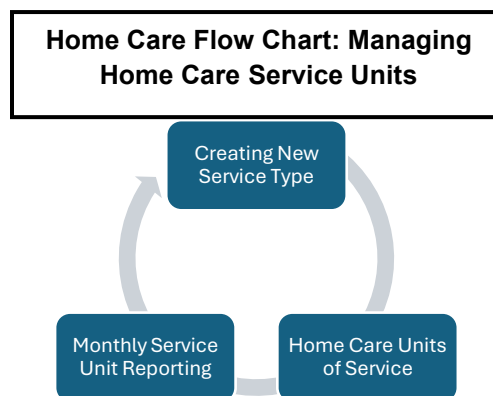
This diagram outlines the major steps involved in working with a new client referred to your program.



This diagram identifies possible updates to a current client's home care service plan.

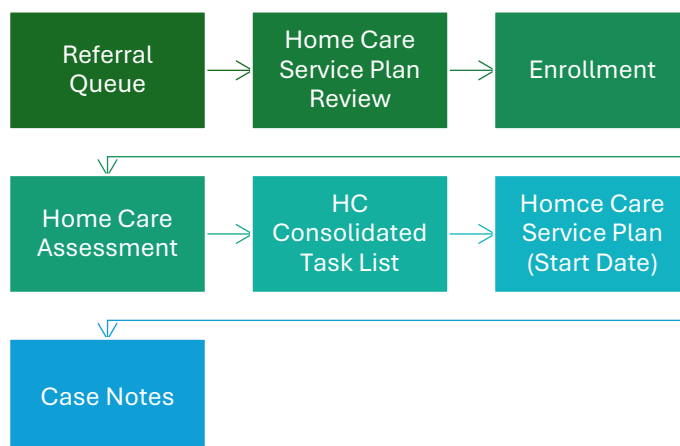


This diagram outlines the major steps involved in creating service type matches, unit entries and monthly summaries.



You can navigate through these steps in this way and once information is entered you can return to previous sections as needed.

## Home Care Flow Chart: Initial Service

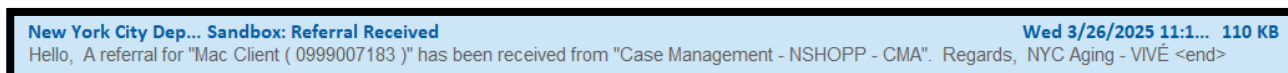


## Referral Queue

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



Your program is alerted to a new home care referral with an email sent from NYC Aging VIVÉ on behalf of the case management program you are associated with.



Any updates or changes made by the case management program to a client's home care services prompts an email to be sent to your program. The initial email notification prompts you to check the queue for the pending referral.

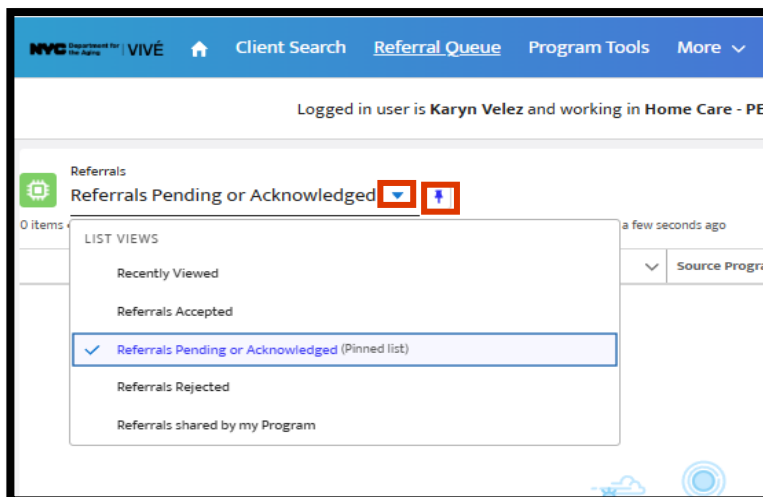
## Reviewing a New Client Referral

**Step 1:** From the **Top Menu**, click **Referral Queue**

**Step 2:** From the **Referral Queue**, use the dropdown filter to select how you want to filter the list. Pin your selection so it's the default option when you return.

A description of each **Referral** filter type:

- **Recently Viewed:** Referrals recently opened and reviewed by the program.
- **Referrals Accepted:** Referrals deemed appropriate for and accepted into the program.
- **Referrals Pending or Acknowledged:** Referrals received but have not been reviewed.
- **Referrals Rejected:** Referrals deemed not appropriate for services from the program.
- **Referrals shared by my Program:** Referrals made by your program to other programs including termination of services.



**Step 3:** To view pending referrals, pick **Referrals Pending or Acknowledged**. You can sort the list using any of the column headings. Click the Referral ID link to view the **Referral Details** form.

The screenshot shows the VIVÉ Referral Queue interface with a list of referrals. The filter 'Referrals Pending or Acknowledged' is selected and pinned. The list shows 3 items, sorted by Referral Name. The first item is highlighted with a red box.

Referral Name	Referral Status	Referral Date	Source Program	Contact	Last Modified By
1 <a href="#">RF-84515</a>	Referral Sent	3/22/2025	Case Management - NSHOPP - CMA	test-clarey client	Karyn Velez
2 <a href="#">RF-84531</a>	Referral Sent	3/25/2025	Case Management - NSHOPP - CMA	Robert Smith	Case User
3 <a href="#">RF-84557</a>	Referral Sent	3/26/2025	Case Management - NSHOPP - CMA	Mac Client	Karyn Velez

**Step 4:** From the **Referral Details** page, you can:

- Link to view the **Home Care Service Plan**.
- **Acknowledge, Accept or Reject** the referral

Referral RF-84557

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

[Referral Details](#) Notes

**Referral Information**

Referral Name RF-84557	Referral Status Referral Sent
Referral Date 3/26/2025	Contact Mac Client
Source Program Case Management - NCHOPP - CMA	Target Program Home Care - PERSONAL TOUCH - Bronx
Is for external agency? <input type="checkbox"/>	External Agency Name

Referral Comments  
Mr. Client is looking forward to services. He needs them as soon as possible

**Service Plan**

[Home Care Service Plan HC-00186](#)

**Services Requested**

Homemaker/Personal Care

**Step 5:** On top of the read-only view of the Home Care Service Plan, you can see the requested service type, including number of hours and frequency of care needed, the cost share or contribution amount, and comments about the plan from the case management agency.

The bottom portion of the form is designated for your home care program. Access to this portion becomes available once the client is enrolled in your program.

Home Care Service Plan HC-00186

Contact [Mac Client](#) Assigned To

☒ For CMA Only

Home Care Program  
☐ Home Care - PERSONAL TOUCH - Bronx

\* Cost Share  
CS-00316

\* Service Type  
☐ Homemaker/Personal Care

\* # of Hours  
8

Contribution Rate Per Hour  
0.00

Cost Share Monthly Amount  
294.12

Override Cost Share Monthly Plan  
☐

Status  
Draft

\* Authorization Date  
Mar 26, 2025

\* Category  
Initial Authorization

\* Frequency  
Weekly

Primary Language  
English

Cost Share Fee Rate Per hour  
8.55

Comments  
Mr. Client needs services as soon as possible.

☒ For Home Care Only

Referral Date  
Mar 26, 2025

\* HC Start Date

\* HC End Date

\* Reason for Delay Start  
--None--

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

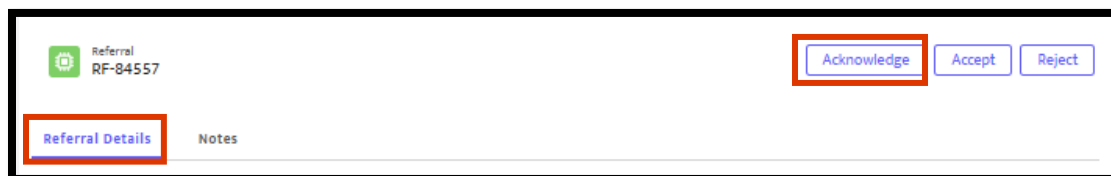
## Acknowledging a Client Referral

**Step 1:** From the **Top Menu**, click **Referral Queue**, use the filter to list your **Referrals Pending or Acknowledged** referrals.

**Step 2:** Click the Referral ID link to view the **Referral Details**.

**Step 3:** From the **Referral Details** and after you have reviewed the referral, you can

choose to select Acknowledge. This alerts the referring program of your receipt of the referral on their **Referral Queue** listing.



Referral RF-84557

Referral Details Notes

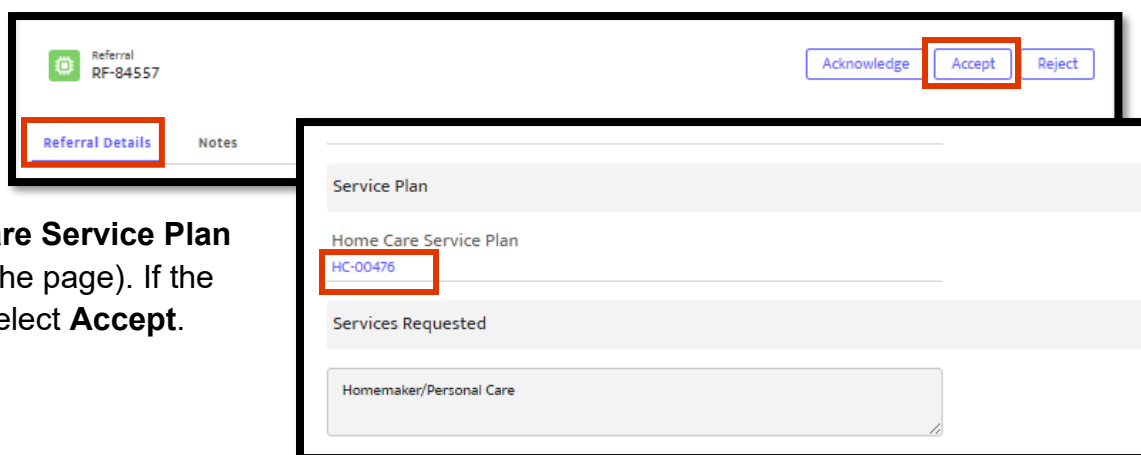
Acknowledge Accept Reject

## Accepting a Client Referral

**Step 1:** From the **Top Menu**, click **Referral Queue**, use the filter to list your **Referrals Pending or Acknowledged** referrals.

**Step 2:** Click the **Referral ID** link to view the **Referral Details**.

**Step 3:** From the **Referral Details** the Home Care Service Plan can be reviewed by clicking the **Home Care Service Plan** link (in the middle of the page). If the plan is appropriate, select **Accept**.



Referral RF-84557

Referral Details Notes

Acknowledge Accept Reject

Service Plan

Home Care Service Plan

HC-00476

Services Requested

Homemaker/Personal Care

**Step 4:** After you select **Accept**, the buttons are replaced with a **Create Enrollment** button. Also, on the **Referral Queue** the referral is moved from the list **Referrals Pending and Acknowledge** to **Referrals Accepted**. The referring program is alerted to this acceptance on their **Referral Queue** listing.



Referral RF-84557

Referral Details Notes

Create Enrollment

## Rejecting a Client Referral

**Step 1:** From the **Top Menu**, click **Referral Queue**, use the filter to list your **Referrals Pending or Acknowledged** referrals.

**Step 2:** Click the Referral ID link to view the **Referral Details**.

**Step 3:** From the **Referral Details** page select the **Reject** button.

**Step 4:** From the **Rejection Details** page, pick the code and enter the reason.

VIVÉ automatically sends a notification and an email to the referring program on your agency's behalf informing them of the rejection.

Referral RF-84557

Acknowledge Accept **Reject**

**Referral Details** Notes

**\*Rejection Code**  
Referral Invalid - Service never provided by agency

**\*Rejection Reason**  
No home care service plan was attached to the referral for review. Need corrected referral with home care service plan attached.

Cancel **Save**

## Referral Notes

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

### Adding a Referral Note

**Step 1:** From the **Top Menu**, click **Referral Queue**, use the filter to view your desired list of referrals.

**Step 2:** Click the **Referral ID** link to view the **Referral Details**.

**Step 3:** Click the **Notes** sub-menu link.

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

**Step 5:** From the **New Referral Note** pop-up enter the title of your note and related comments.

**Step 6:** Select **Save**.

Referral RF-84520

Acknowledge Accept Reject

Referral Details **Notes**

From To Filter

Notes (0)

**New Note** Print Notes

Program Name

**New Referral Note**

Title  
Referral Acknowledged

Comments  
In process of reviewing referral for acceptance or rejection

61 / 10000 characters

Cancel **Save**

### Editing a Referral Note

**Step 1:** From the **Top Menu**, click **Referral Queue**, use the filter to view the list of referrals.

**Step 2:** Click the Referral ID link to view the **Referral Details**.



**Step 3:** From the List View of the **Referral Details** and at the right of note's row, select **Edit**.

**Step 4:** From the **Edit Referral Note** pop-up make any necessary changes. Select **Save**.

The screenshot shows the 'Referral Details' page with the 'Notes' tab selected. A table lists notes, with the first note highlighted. An 'Edit' button is visible next to the note. A pop-up window titled 'Edit Referral Note' is shown, containing fields for 'Title' (Referral Acknowledged) and 'Comments' (In process of reviewing referral for acceptance or rejection. To review by Friday.). The 'Save' button is highlighted.

## Enrollment

Enrollment is the process of adding the client into your program so further actions can be taken in their record. This process begins after you have approved a referral.

### Enrolling a New Client

**Step 1:** From the **Referral Details** page, select the **Create Enrollment** button.

**Step 2:** The **Create Enrollment** pop-up appears. All fields are pre-populated. Confirm the **Enrollment Date**, which can be set in the past, but never in the future. Select **Save**.

With the client enrolled, you have access to the **Enrollment Details** menu, which provides access to forms, assessments, the Home Care Service Plan, Event Sign-up, Case Notes, Unit Entry, and more. It provides an overview of the client's enrollment and referral information.

The screenshot shows the 'Referral Details' page for referral RF-84557. The 'Create Enrollment' button is highlighted. A pop-up window titled 'Create Enrollment' is shown, containing fields for 'Program' (Home Care - PERSONAL TOUCH - Bronx), 'Contact' (Mac Client), and 'Enrollment Date' (Mar 26, 2025). The 'Save' button is highlighted.

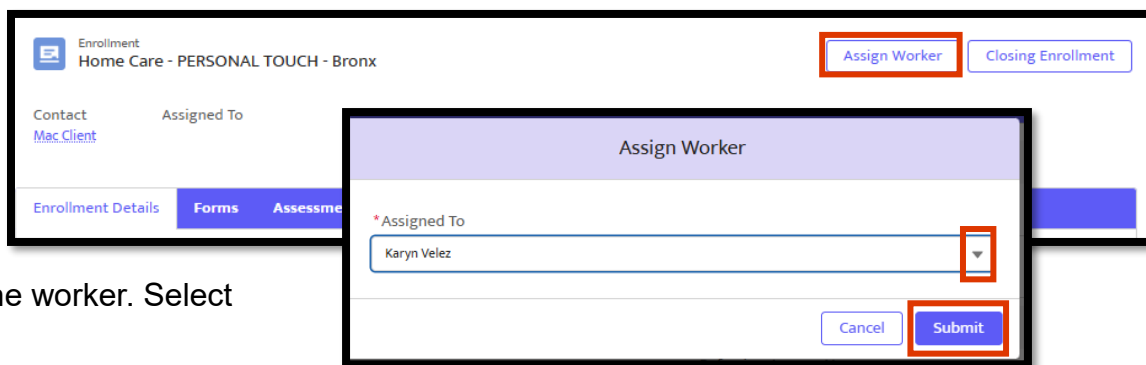
## Assigning a Client Enrollment to a Worker

**Step 1:** From the **Top Menu**, click **Client Search**, click the **Name Link** of the client.

**Step 2:** From the **Details** menu, select the **Enrollment** tab. Click on the **Enrollment Name** link.

**Step 3:** Select the **Assign Worker** button.

**Step 4:** From the **Assign Worker** pop-up, use the dropdown to pick the worker. Select **Submit**.



You can re-assign a worker at any time.

The assigned worker receives two notifications.

- The client's enrollment is listed within the assigned workers **My Enrollments** on the Dashboard. It can take a minute, refresh the **Dashboard** if the enrollment isn't immediately there.
- The assigned worker receives a notification accessible from the **Bell** icon on the **Top Menu**.

**BEST PRACTICE TIP:** *Since clients are usually assigned to the home care coordinator, it is not required for programs to use the **Assign Worker** feature. However, this feature is a tool that can be used by the home care program if it helps streamline the overall workflow.*

## Home Care Assessment

An assessment is a collection of forms that streamline the re-assessment process. The Home Care Assessment includes 9 forms. There are two parts of an assessment: the details and forms.

- Assessment Details include when the assessment was created, by whom and its status. Only pending assessments can be edited. The completed status allows you to track your client overtime. There is a cloning feature that further streamlines the reassessment process
- Forms are a mixture of **Page** and **List View** and have three different status types for assessments: **Pending**, **Completed** and **Inactive**.

There are different styles forms. The first is a **List View**, such as Assistive Devices. List View forms display rows of historical forms saved. Click the **New** button to create one or click on the form **ID number** link to access and/or edit the details. The second is a single **Page View** form, such as

Information (HC). Page View is a single form that when edited overwrites the previous entry. To start or edit a Page View form, select the **Edit** button.

## Example List View: Assistive Devices

These provide a historical list of completed forms. To create this form, select **New**. To edit a form, click on the form's ID link.

The image shows two screenshots of the 'Assistive Devices' section. The top screenshot is the 'List View' showing a table of existing forms. The bottom screenshot is the 'Form View' for creating or editing a form.

**List View:**

Sr. No.	Assistive Devices	Does the client	Assessment ID	Created Date	Own/Shared Form
1	Hand Held Shower	Has Device	AS-23519	04/12/2025	Own Form
2	Cane/Support Cane	Has Device	AS-23519	04/12/2025	Own Form

**Form View:**

Assistive Devices (Please indicate which assistive device the client has, needs or requires training to use)

Select the Assistive Device: Hand Held Shower

Does the client:

☒ Has Device ☐ Needs Training on use of device

☐ Needs Device

Buttons: Reset, Cancel, Save, Save & Exit

List View forms have multiple options after you have viewed or edited the page. They are:

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

## Example Page View: Information (HC)

Saved edits replace previous entries.

Some fields are grey, because they are pre-populated from the **Client Profile**. Select the **Edit** button to make changes.

The image shows the 'Information (HC)' form in 'Page View'. The 'Information (HC)' tab is selected in the top navigation bar. The form contains a 'Basic Information' section with a 'Client Lives With' field. The form is pre-populated with data from the 'Client Profile'. The 'Edit' button is visible in the bottom right corner.

Buttons: Reset, Cancel, Save

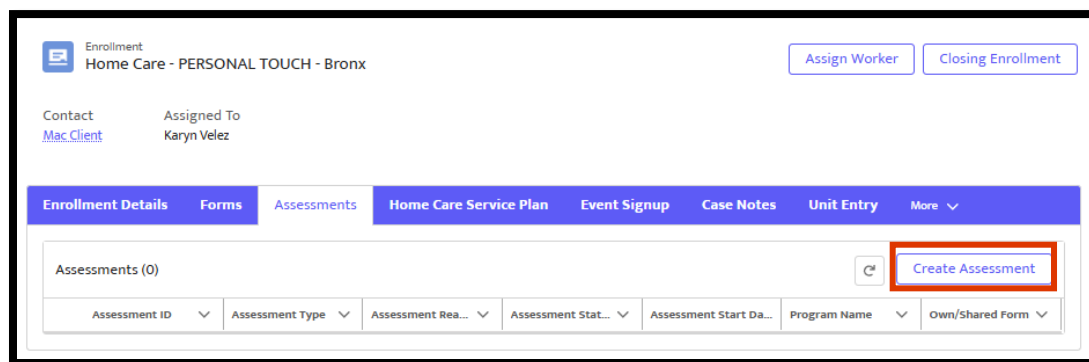
After editing a Page View form, there are three actions: **Reset**, **Cancel** and **Save**. These actions have the same properties described as **List View**.

## Creating a Home Assessment

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

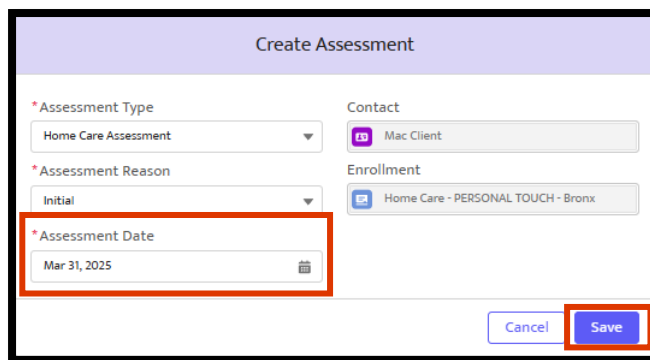
**Step 2:** From the **Details Menu**, click the **Enrollment** tab, click the enrollment name link.

**Step 3:** From the **Enrollment Details Menu**, click the **Assessment** Tab and select the **Create Assessment** button.



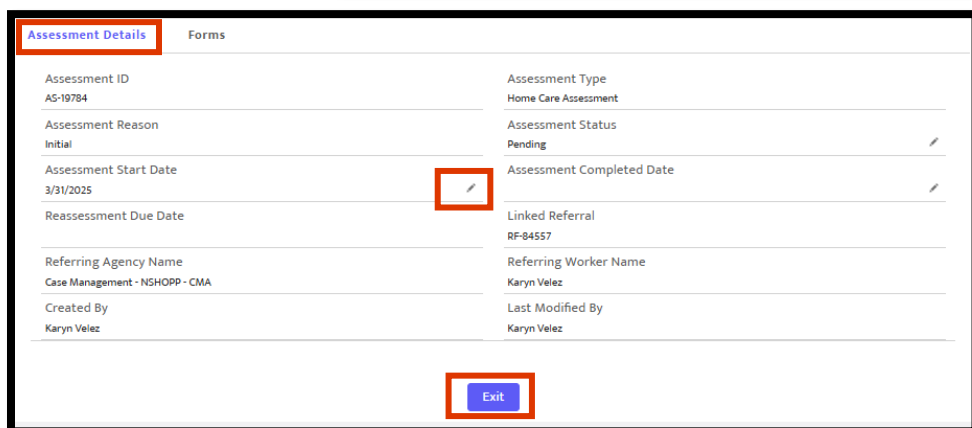
The screenshot shows the 'Enrollment Details' menu for 'Home Care - PERSONAL TOUCH - Bronx'. The 'Assessments' tab is selected. Below the tabs, there is a 'Create Assessment' button highlighted with a red box. The menu also includes buttons for 'Assign Worker' and 'Closing Enrollment'.

**Step 4:** On the **Create Assessment** pop-up all the fields are pre-populated. Confirm the **Assessment Date**. It can be set in the past but never in the future. Confirm that all required fields are completed before selecting **Save**.



The screenshot shows the 'Create Assessment' pop-up form. The 'Assessment Date' field is highlighted with a red box and shows 'Mar 31, 2025'. Other fields include 'Assessment Type' (Home Care Assessment), 'Assessment Reason' (Initial), 'Contact' (Mac Client), and 'Enrollment' (Home Care - PERSONAL TOUCH - Bronx). The 'Save' button is also highlighted with a red box.

**Step 5:** From the **Assessment Details** sub-menu, the Status defaults to **Pending**. Use the pencil icons to make any changes. Select **Exit**.



The screenshot shows the 'Assessment Details' sub-menu. The 'Assessment ID' is AS-19784, 'Assessment Reason' is Initial, 'Assessment Start Date' is 3/31/2025, and 'Assessment Status' is Pending. The 'Exit' button is highlighted with a red box. The 'Assessment Date' field is also highlighted with a red box and shows a pencil icon for editing.

**Step 6:** Click on the **Forms** sub-menu to access the forms of the **Home Care Assessment**. There are 9 forms available here. Click the forms link to access them. Depending upon your window width you may need to click on **More** to access other forms.

**Step 7:** Click the desired form sub-menu then select either the **Edit** button or **New** button depending upon the form style.

**NOTE:** If there is an Assessment with the status of Pending, you cannot create another. You must change the status of the Pending Assessment to Completed before creating a new one.

## Editing/Updating a Home Assessment

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

**Step 2:** From the **Details Menu**, click **Enrollment** tab, click the enrollment name link.

**Step 3:** From the **Enrollment Details Menu** click the **Assessments** tab and click on a pending **Assessment ID** link. Only pending Assessments can be edited.

**Step 4:** On the **Assessment Details** page use pencil icons to edit specific fields. When adding the **Assessment Completion Date**, it cannot be the same date as the **Start Date**.

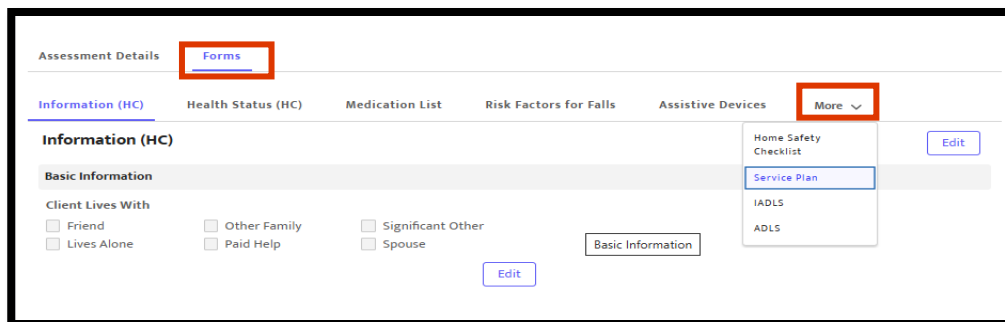
After confirming edits, click **Save** then **Exit**.

**Step 5:** From the **Assessment Details** page, click **Forms** sub-menu. Then click the **Form Name** you want to edit. If you don't see the form name, click **More**.

If the form is Page View, then select the **Edit** button.

If the form is List View, click the **Form ID** link.

Confirm your edits before selecting the **Save** or the **Cancel** button if you do not want to save your entries.



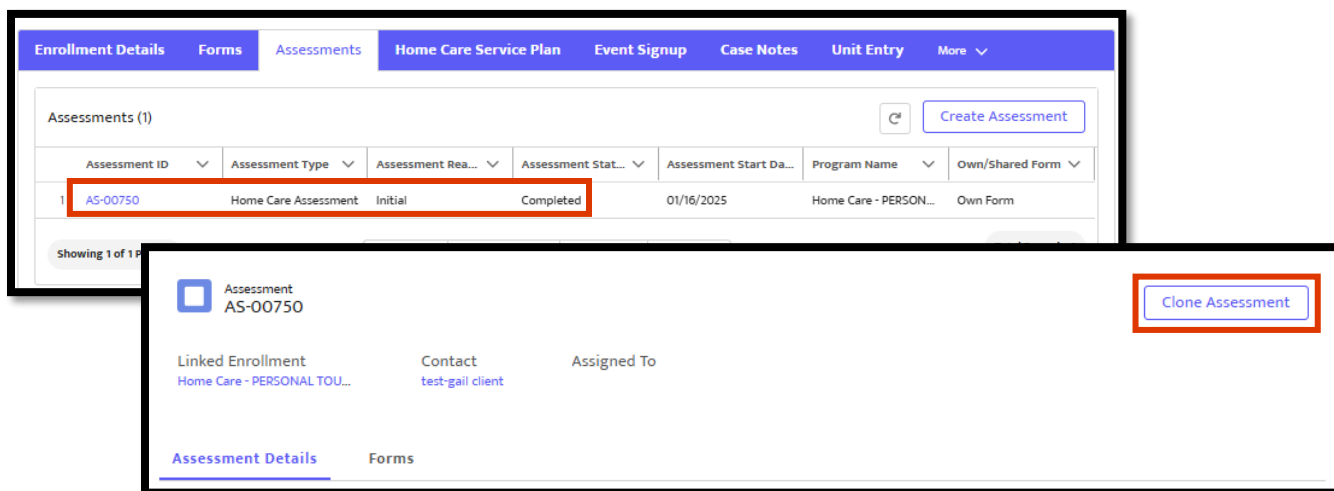
## Cloning an Assessment

At the time of the 6-month assessment visit, you can Clone or copy the previous assessment to streamline the editing process of the assessment if any changes have occurred for the client.

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

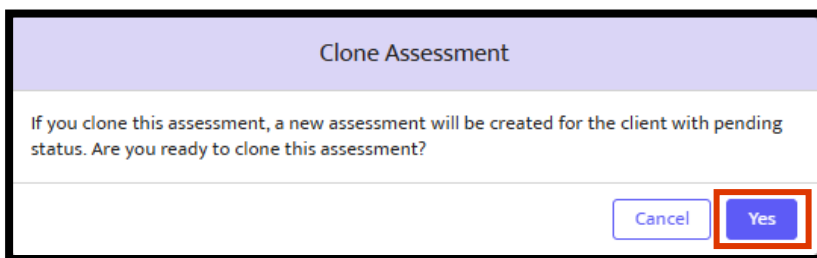
**Step 2:** From the **Details Menu**, click **Enrollment** tab, click **Enrollment Name** link.

**Step 3:** On the **Enrollment Details Menu**, click **Assessments** tab, click most recent **Assessment ID** link marked **Completed**.



**Step 4:** From the **Assessment Details** sub-menu, select **Clone Assessment** button in upper right corner.

**Step 5:** Review and then confirm **Yes** that you want to clone the assessment on the **Clone Assessment** pop-up.

A pop-up dialog box titled "Clone Assessment" with a light purple header. The main text reads: "If you clone this assessment, a new assessment will be created for the client with pending status. Are you ready to clone this assessment?". At the bottom right, there are two buttons: "Cancel" and "Yes". The "Yes" button is highlighted with a red border.

**NOTE:** After cloning an Assessment, the List View will show both the previous and cloned assessments – the recently cloned with a Pending status and the previous with the status Completed.

## HC Consolidated Task List

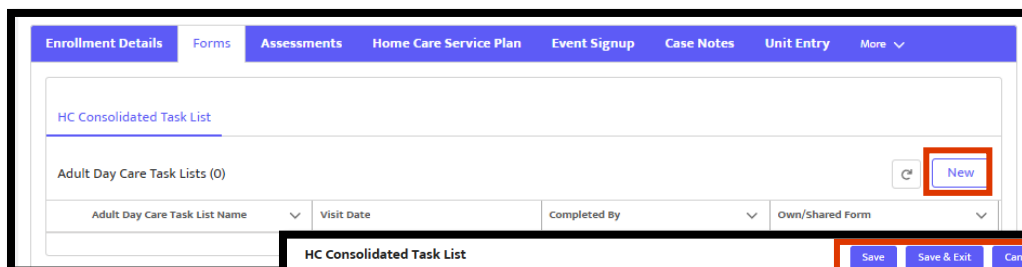
The **HC Consolidated Task List** is the only form within the **Forms** section.

### Creating a HC Consolidated Task List

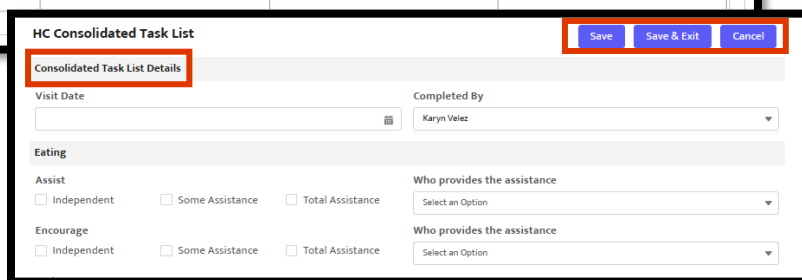
**Step 1:** From the **Top Menu**, click **Client Search**, click on the client's name link.

**Step 2:** From the **Details Menu**, click the **Enrollment** tab, click the enrollment name link.

**Step 3:** On the **Enrollment Details Menu**, click the **Forms** tab. Click the **New** button.

A screenshot of the "Enrollment Details" page. The "Forms" tab is selected. Below the tab, there is a section titled "HC Consolidated Task List". Under this section, it says "Adult Day Care Task Lists (0)". To the right of this text is a "New" button, which is highlighted with a red border.

**Step 4:** From the **Consolidated Task List Details** form, enter all appropriate fields.

A screenshot of the "HC Consolidated Task List" form. The form has a header with "Save", "Save & Exit", and "Cancel" buttons. Below the header, there is a section titled "Consolidated Task List Details". This section includes fields for "Visit Date" and "Completed By" (with a dropdown menu showing "Karyn Velez"). Below these fields, there are two sections: "Eating" and "Assist". Each section has three radio button options: "Independent", "Some Assistance", and "Total Assistance". To the right of these options, there are two dropdown menus labeled "Who provides the assistance" and "Select an Option".

Selecting **Save** returns you to the Details page with the completed fields in grey. Selecting **Save & Exit** saves the data and returns you to the List View. Cancel does not save anything and returns you to the List View.

## Editing a HC Consolidated Task List

From the **HC Consolidated Task List** click on a pending ID link. Then select **Edit**.

Then select the appropriate button to return to the List View.

The screenshot shows the 'HC Consolidated Task List' form. At the top right, there are 'Edit' and 'Cancel' buttons. The 'Edit' button is highlighted with a red box. Below the form, there are four buttons: 'Reset', 'Cancel', 'Save', and 'Save & Exit'. These buttons are also highlighted with a red box.

## Home Care Service Plan (Start Date)

Once a date is set for the start of a client's home care services, update the **Home Care Service Plan** to reflect this service start.

### Updating Home Care Service Plan

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

**Step 2:** From the **Details Menu**, click the **Enrollment** tab, click the enrollment name link.

**Step 3:** On the **Enrollment Details Menu**, click on the **Home Care Service Plan** tab.

**Step 4:** Click on the draft **Plan ID** link.

**Step 5:** The top section of this form is for the CMA to manage. Your section is toward the bottom. Click the triangle down to reveal the **HC Start Date**. The start date cannot be prior to the **Referral Date**, but it can be in the future. Dates that are more than 5 business days in the future will require the **Reasons for Delay Start** field to be completed. Select **Save**. The referring program will view the service start date on their Home Care Service Plan List View.

The screenshot shows the 'Home Care Service Plan' form. The 'Draft' status is highlighted with a red box.

The screenshot shows the 'Home Care Service Plan' form. The 'For Home Care Only' radio button is highlighted with a red box. The 'HC Start Date' and 'Reason for Delay Start' fields are also highlighted with red boxes.



## Case Notes

Case Notes is a tool that can be used to document client interactions and update your Program Officer. (For more information on [Case Notes](#).)

## Documents

Documents is a tool that can be used to add, edit, and view records of various document types associated with a client's file by uploading them into the database. (For more information on [Documents](#).)

**BEST PRACTICE TIP:** *It is not required for programs to use either the Case Notes or Documents features. However, these features are tools that can help streamline the process of providing access by your Program Officer to documented actions taken by the home care service program.*

## Home Care Flow Chart: Client Service Updates

There are four service updates that impact the provision of home care services:

- 1) Placing a client's service on hold.
- 2) Changing the number of service hours.
- 3) Changing the cost share/contribution amount.
- 4) Terminating home care services.

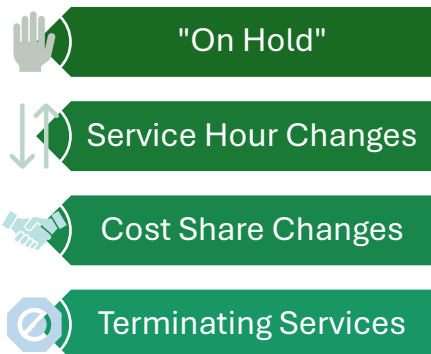
### These Updates are Managed within Home Care Service Plan

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

**Step 2:** From the **Details Menu**, click the **Enrollment** tab, click the enrollment name link.

**Step 3:** From the **Enrollment Details Menu**, click the **Home Care Service Plan** tab.

### Home Care Flow Chart: Client Service Updates



## On Hold

When a client's home care services are put **On Hold**, the case management agency initiates the on hold, and your agency receives an email.

New York City Dep... Sandbox: On Hold for Home Care

Hello, Home Care services for "test-cutie client ( 0999007173 )" were placed On Hold on "4-2-2025". Regards, NYC Aging - VIVÉ <end>

Tue 4/1/2025 5:00 PM 111 KB

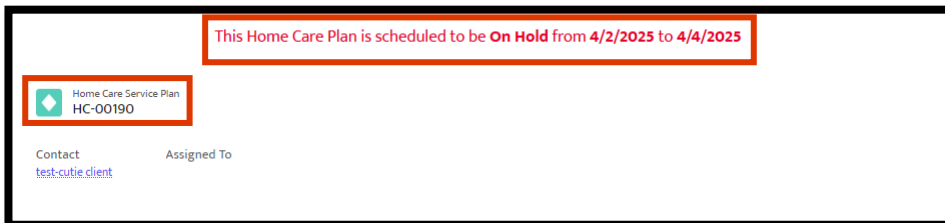
## VIVÉ Knowledge Base – Home Care Programs

Information about the on hold is noted in the client's **Home Care Service Plan**. Once the scheduled dates for the on hold have ended, the system automatically removes the notation from the service plan.

There is no further action that needs to be taken by the home care program in VIVÉ.

### Service Hour Changes

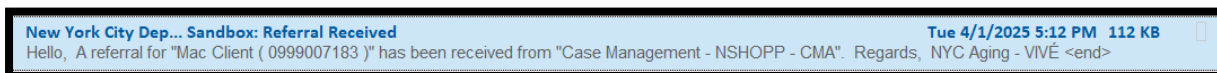
If the client's service hours need to be changed, the case management program sends a new service plan referral. An email is sent to your program alerting you to the new referral.



As changes to Service Hours require a new referral (for auditing purposes), you must accept the referral as described at the beginning of this guide.

### Cost Share Changes

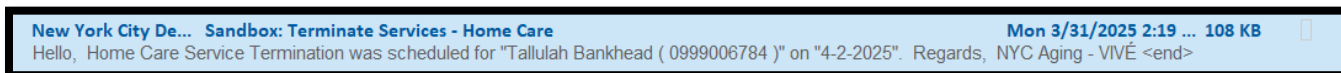
If the client's cost share rate changes or becomes a contribution rate, the case management program sends an updated service plan referral to the home care program. An email is sent to your program alerting you to the new referral.



As changes to Cost Share require a new referral (for auditing purposes), you must accept the referral as described at the beginning of this guide.

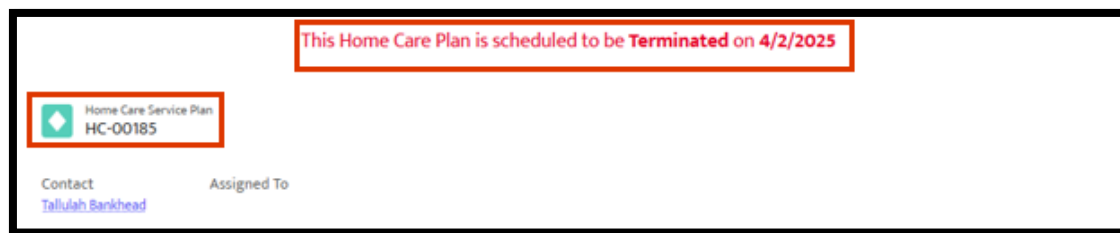
### Terminating Services

If the client's home care services need to be terminated, the case management agency initiates this action, and your agency receives an email regarding the termination.



## VIVÉ Knowledge Base – Home Care Programs

Notification about the scheduled termination is displayed on the **Home Care Service Plan** associated with the client.

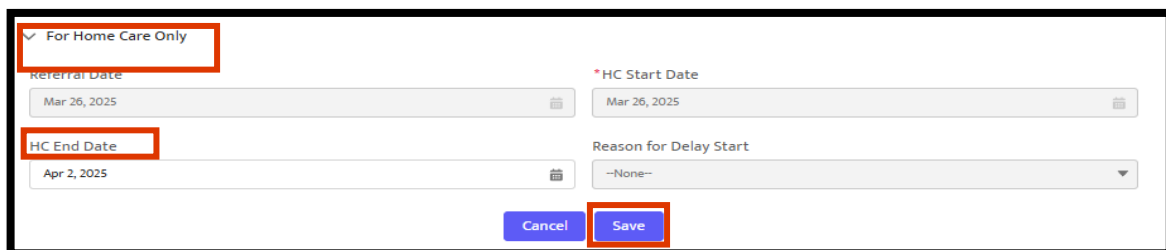


This Home Care Plan is scheduled to be **Terminated on 4/2/2025**

Home Care Service Plan  
HC-00185

Contact: Talulah Bankhead      Assigned To:

Within the For Home Care Only section of the Home Care Service Plan (at the bottom of the page), enter the termination date in the **HC End Date** field and select **Save**. The system automatically changes this status to **Terminated**.



☒ For Home Care Only

Referral Date: Mar 26, 2025      \* HC Start Date: Mar 26, 2025

**HC End Date:** Apr 2, 2025      Reason for Delay Start: --None--

Cancel      Save

There is no further action that needs to be taken by the home care program in VIVÉ.

**NOTE:** The Closing Enrollment button does not need to be selected by the Home Care program as part of the Termination process. VIVÉ will automatically close the client's enrollment once the date of termination is reached.

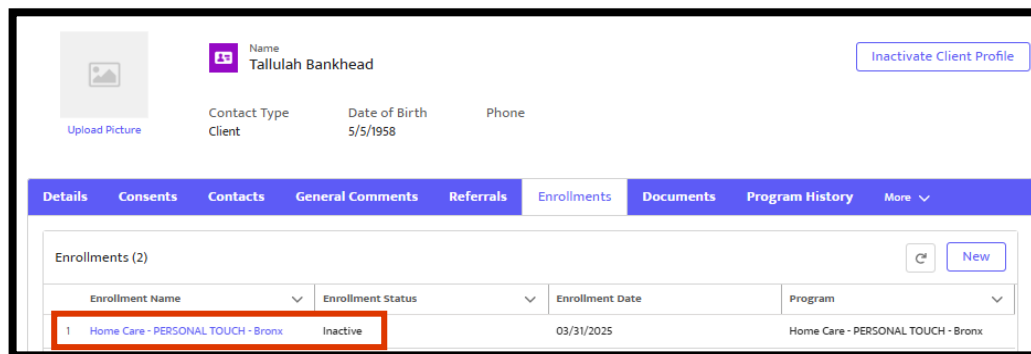
## Confirming Service Termination

The client's service termination is noted both on the **Enrollments Tab** and on the **Home Care Service Plan**.

### Confirming Service Termination: Enrollments Tab

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

**Step 2:** From the **Details Menu**, click the **Enrollment** tab, click the enrollment name link. View the Enrollment Status as **Inactive**.



Client Profile: Tallulah Bankhead


Details | Consents | Contacts | General Comments | Referrals | **Enrollments** | Documents | Program History | More

Enrollments (2)

Enrollment Name	Enrollment Status	Enrollment Date	Program
1 Home Care - PERSONAL TOUCH - Bronx	Inactive	03/31/2025	Home Care - PERSONAL TOUCH - Bronx

**Step 3:** Click on the **Inactive Enrollment Name** link.

The **Enrollment Details Menu** displays a message and the Enrollment Details Status changes to **Inactive**.



Enrollment: Home Care - PERSONAL TOUCH - Bronx

Contact: Tallulah Bankhead | Assigned To: [Empty]

Enrollment Details | Forms | Assessments | Home Care Service Plan | Event Signup | Case Notes | Unit Entry | More

Enrollment Information

Enrollment Name	Home Care - PERSONAL TOUCH - Bronx	Enrollment Status	Inactive
-----------------	------------------------------------	-------------------	----------

If the services are ever required again, the case management program would create a new **Home Care Service Plan** referral. A new enrollment would then be created by your program.

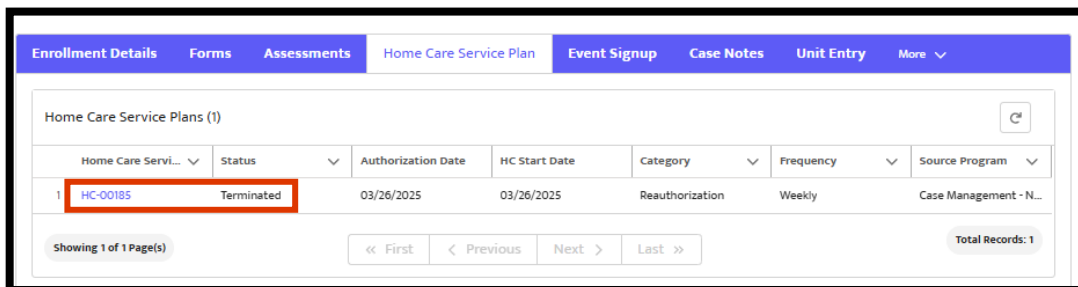
## Confirming Service Termination: Home Care Service Plan

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

**Step 2:** From the **Details Menu**, click the **Enrollment** tab, click the enrollment name link.

**Step 3:** From the **Enrollment Details Menu**, click the **Home Care Service Plan** tab.

On the **Home Care Service Plan List** View the plan's status changes to **Terminated**.



Enrollment Details | Forms | Assessments | **Home Care Service Plan** | Event Signup | Case Notes | Unit Entry | More

Home Care Service Plans (1)

Home Care Servi...	Status	Authorization Date	HC Start Date	Category	Frequency	Source Program
1 HC-00185	Terminated	03/26/2025	03/26/2025	Reauthorization	Weekly	Case Management - N...

Showing 1 of 1 Page(s) | Total Records: 1

**Step 4:** Click the Plan's **ID link** to see on the Home Care Service Plan details that Status also changed to Terminated.

The service plan now provides information regarding the date of termination, the code associated with the termination and detailed reasons for the termination.

Home Care Service Plan  
HC-00185

Contact: [Tallulah Bankhead](#) Assigned To:

For CMA Only

Home Care Program: **Status** Terminated

\*Cost Share: CS-00310 \*Authorization Date: Mar 26, 2025

\*Service Type: Homemakers/Personal Care \*Category: Reauthorization

\*# of Hours: 8 \*Frequency: Weekly

Contribution Rate Per Hour: 0.00 Primary Language:

Cost Share Monthly Amount: 441.98 Cost Share Fee Rate per hour: 12.83

Override Cost Share Monthly Plan: ☐

Comments: Event-based assessment for Mrs. Bankhead.

Termination Date: Apr 2, 2025 Termination Code: Client moved out of the service area

Termination Reason: Mr. Bankhead will be moving to Maine to live with her daughter.

For Home Care Only

Referral Date: Mar 26, 2025 \*HC Start Date: Mar 26, 2025

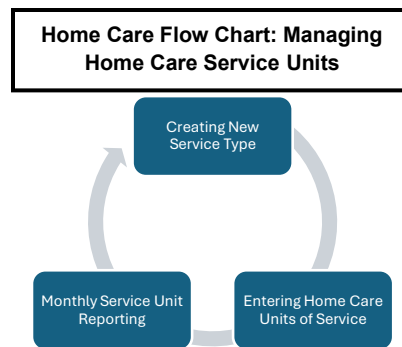
HC End Date: Apr 2, 2025 Reason for Delay Start: --None--

Cancel Save

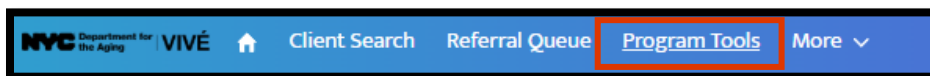
## Managing Home Care Service Units

Management of home care service units involves three actions:

- 1) Creating Home Care Service Types
- 2) Entering Units of Service
- 3) Generating Monthly Unit Summary Report



## These Actions are Managed within Program Tools on the Top Menu.



Within **Program Tools**, units of service are managed by **Event Profile**.

Each Home Care service type, such as Housekeeping/Chore is created as an Event. There are five actions with **Events**:

- 1) Create an event.
- 2) Edit an event.
- 3) Sign up clients to an event.
- 4) Mark clients that have attended an event.
- 5) Inactivating an event.

The first action, creating an event, is unique to Home Care. The other four actions are common. (For more information on [Events](#).)

## Creating a New Service Type: Event

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

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

**Step 3:** From the **New Event Profile** pop-up, complete the required fields.

- **Event Name:** recommend using the same name as the Service Type.
- **Host Type:** always In-Person
- **Service Types** are those you are contracted to provide.

Select **Save** after confirming entries.

The image shows a screenshot of the 'New Event Profile' form. At the top, there is a blue header bar with tabs: 'Event Profile', 'Monthly Unit Summary', 'Survey Invitation Links', and 'Ticketing Module'. Below the header, there is a table with columns: 'Event Name', 'Host Type', 'Event Type', 'Unit Type', 'Event Start Date', and 'Event End Date'. The first row of the table shows 'Homemaker / Personal Ca...', 'In-Person', 'Units by Client', 'Hour', '02/07/2025', and an empty cell. To the right of the table, there is a button labeled 'New Event Profile' which is highlighted with a red rectangular box. Below the table, there is a form with various fields: 'Start Date' (Apr 12, 2025), 'End Date', 'Event Name' (Housekeeping / Chore), 'Status' (Open), 'Event Start Time', 'Event End Time', 'Host Type' (--None--), 'Service Type' (Housekeeping/Chore), 'Is this event happening at Program Site?' (No), 'Location' (Search Addresses...), 'Event Capacity', and 'Fee Amount'. At the bottom right of the form, there are two buttons: 'Cancel' and 'Save', with the 'Save' button highlighted by a red rectangular box.

## Entering Home Care Units of Service

Home Care Units of Service can either be entered via **Event Profile** or through the client's record on **Enrollment Details**. **Event Profile** unit entry can be used for a single client, or several clients at the same time. **Enrollment Details** unit entry is specific to that client and is generally used when there has been some type of service interruption for the client during the month (i.e., an on-hold of services).

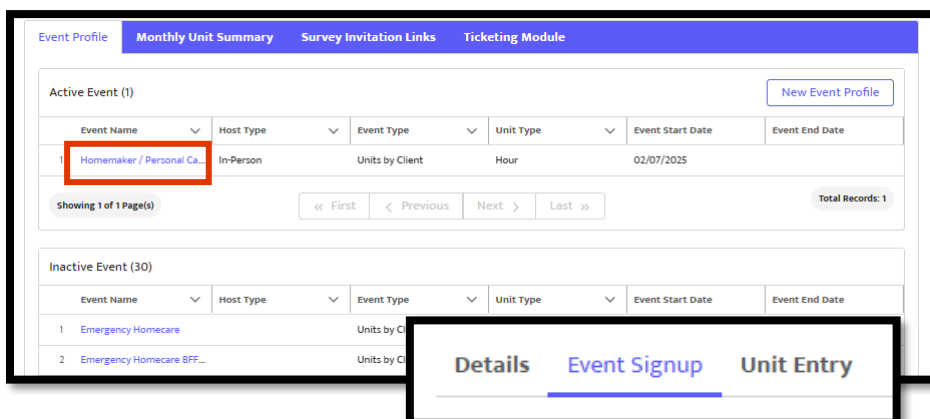
### Event Profile

#### Home Care Service Signup: Client

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

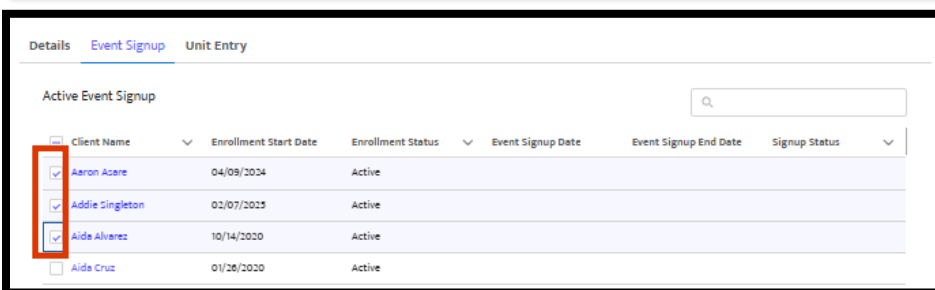
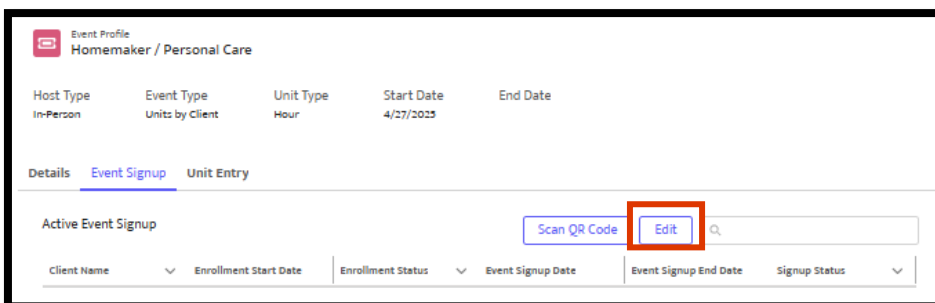
**Step 2:** Click desired **Event Name** ID link. Three sub-tabs display:

- **Details:** Overview of the service type event.
- **Event Signup:** Ability to assign enrolled clients to service type event.
- **Unit Entry:** Ability to enter client home care units.



**Step 3:** Click **Event Signup**, select **Edit** button. Enrolled clients List View displays.

**Step 4:** Select checkbox for client to receive service. Select **Save**.



## Home Care Service: Unit Entry

**Step 1:** Click **Unit Entry**, select **New** button. Unit Entry page displays. Three actions are available (middle of page) to enter home care units:

- **Filter:** Sorts clients by name.
- **Auto Fill:** Adds Funding Source, Units and/or Fee Amount to one or all clients on List View.
- **Select all Attended:** If selected, denotes services received by all clients on List View.

**Step 2:** Complete **Date of Occurrence** and all required fields. Select **Save**. The List View displays Unit Entry status as **Draft**.

Details Event Signup **Unit Entry**

Unit Entry (0)

New

Unit Ent... Date of Occu... Service... Total Cli... Total Un... Total \$ Created... Created Date Source Status

**Unit Entry**

**Event Details**

Event Profile: Homemaker / Personal Care

Event Location: 36-36 33RD STREET, LONG ISLAND CITY, NY 11106

Event Type: Units by Client

Unit Type: Hour

Fee Amount:

Event Manager:

**Unit Entry Details**

\*Date of Occurrence: Apr 27, 2025

\*Status: Draft

Total Units:

Total \$:

**Filter & Auto Fill**

Name: test Filter

Funding Source: NYC Aging Funded Ser... Units: 0 Amount: 0

Auto Fill

Select all Attended? ☒

Scan QR Code

**Client List**

Name	Date of Birth	Gender	Home Address	Enrollment Status	Funding Source	Units	Amount	Attended?
test-blanca client	02/24/1946		119-45 UNION TURNPIKE, 12D, QUEENS, NY 11375	Active	NYC Aging Funded Service	0	0	<input checked="" type="checkbox"/>
test-cutie client	03/20/1946	Female (F)	435 GERARD AVENUE, 13, BRONX, NY 10431	Active	NYC Aging Funded Service	0	0	<input checked="" type="checkbox"/>
test-gail client	12/31/1934		435 GERARD AVENUE, 360, BRONX, NY 10431	Active	NYC Aging Funded Service	0	0	<input checked="" type="checkbox"/>
test-helen client	09/08/1946		2 LAFAYETTE STREET, MANHATTAN, NY 10007	Active	NYC Aging Funded Service	0	0	<input checked="" type="checkbox"/>

Details Event Signup **Unit Entry**

Unit Entry (2)

New

Unit Ent... Date of Occu... Service... Total Cli... Total Un... Total \$ Created... Created Date Source Status

1	UE-9298067	04/27/2025	Homemaker/...	16	192	Karyn Velez	04/27/2025	Event	Draft
---	------------	------------	---------------	----	-----	-------------	------------	-------	-------



## Editing Units: Single Client

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

**Step 2:** Click desired **Event Name ID** link, click **Unit Entry** sub-tab, click **Unit Entry #** link on List View. Unit Entry page displays.

**Step 3:** Use **Filter** to find client record for editing. Use **Auto Fill** to edit Funding Source, Units and/or Fee Cost. Select **Save**. The List View displays edited **Total Units** amount.

## Editing Units: Voiding a Unit Entry

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

**Step 2:** Click desired **Event Name ID** link, click **Unit Entry** sub-tab, click **Unit Entry #** link on List View. Unit Entry page displays.

**Step 3:** Select **Void Unit** button. The List View displays Unit Entry status as **Voided**.

## Enrollment Details

### Home Care Service Signup & Unit Entry

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

**Step 2:** From the **Details Menu**, click the **Enrollment** tab, click the enrollment name link.

**Step 3:** On the **Enrollment Details Menu**, click on the **Unit Entry** tab and then the **New** button. Unit Entry page displays.

The screenshot shows the 'Unit Entry' page for 'Home Care - PERSONAL TOUCH - Bronx'. The 'Unit Entry' tab is selected in the top navigation bar. A 'New' button is highlighted in the top right corner of the page.

**Step 4:** Complete all required fields and **Host Type**. The **Date of Occurrence** (date can be backdated), is the last day services are delivered, prior to service interruption, during that month. Selecting a **Service Type** changes **Time Spent** to a required field. **Time Spent** must then be recorded in minutes to autogenerate the correct **Total Units**. Select **Save**. The List View displays Unit Entry status as **Draft**.

The screenshot shows the 'Unit Entry' form with the following fields filled out:
 

- Date of Occurrence:** Oct 23, 2025
- Enrollment:** Home Care - PERSONAL TOUCH - Bronx
- Service Type:** Homemaker/Personal Care
- Funding Source:** NYC Aging Funded Service
- Time Spent:** 150 min
- Status:** Draft
- Client:** Theodore T Client
- Host Type:** In-Person
- Unit Type:** Hour
- Total Units:** 2.50

 The 'Save' button is highlighted at the bottom right.

The screenshot shows the 'Unit Entry' list view with one entry. The 'Status' column for the entry is highlighted as 'Draft'.

Unit Entr...	Date of Occu...	Service T...	Funding ...	Units	Amount	Created ...	Created Date	Source	Status
1	UE-23168537	10/23/2025	Homemaker/...	NYC Aging Fu...	2.5	Karyn Velez	10/23/2025	Enrollment	Draft

## Editing Units

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

**Step 2:** From the **Details Menu**, click the **Enrollment** tab, click the enrollment name link.

**Step 3:** On the **Enrollment Details Menu**, click on the **Unit Entry** tab and click desired Unit Entry # link on List View. Unit Entry page displays.

Unit Entr...	Date of Occu...	Service T...	Funding ...	Units	Amount	Created ...	Created Date	Source	Status
1 <b>UE-23168537</b>	10/23/2025	Homemaker/...	NYC Aging Fu...	2.5		Karyn Velez	10/23/2025	Enrollment	Draft

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

**Step 4:** Make all edits and select **Save**. The List View continues to display Unit Entry in **Draft** status with updated information.

\*Time Spent: 330 min    \*Total Units: 5.50

Service Comments

Case Notes

Unit Entr...	Date of Occu...	Service T...	Funding ...	Units	Amount	Created ...	Created Date	Source	Status
1 <b>UE-23168537</b>	10/23/2025	Homemaker/...	NYC Aging Fu...	<b>5.5</b>		Karyn Velez	10/23/2025	Enrollment	Draft

Void Unit   **Save**

## Editing Units: Voiding a Unit Entry

**Step 1:** From the **Top Menu**, click **Client Search**, click on client's name link and select the Enrollment name link on **Enrollment Details**.

**Step 2:** Click on the **Unit Entry #** link on List View. Unit Entry page displays.

**Step 3:** Select **Void Unit** button. The List View displays Unit Entry status as **Voided**.

Cancel   **Void Unit**   Save

Unit Entr...	Date of Occu...	Service T...	Funding ...	Units	Amount	Created ...	Created Date	Source	Status
1 <b>UE-23168537</b>	10/23/2025	Homemaker/...	NYC Aging Fu...	0		Karyn Velez	10/23/2025	Enrollment	<b>Voided</b>

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

## Monthly Service Unit Reporting

**Monthly Unit Summary** (accessible from Program Tools) reports on the units entered. For auditing purposes, the Monthly Unit Summary finalizes each month's units. (For more information on [Monthly Unit Summary](#).)

**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](#)