VIVÉ Reports

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 running reports in 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 contact to your program officer or view NYC Aging's Program Standards.

In this guide you will learn about:

- Reports Overview
  - The Reports Builder
- Defining the Report Types
  - Report Types & Their Logic
- Filtering Reports
- Printing Reports
- Exported Reports
  - Downloading Exported Report

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

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

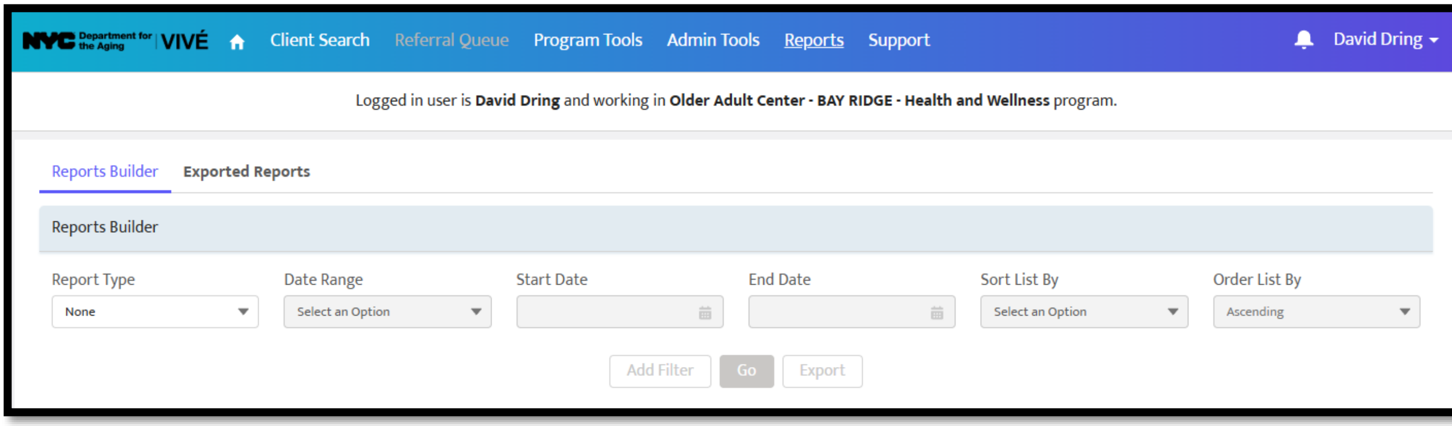
- Basic Navigation
- Case Notes
- Client Profile
- Client Search & Initial Data Entry
- Consent
- Contacts
- Dashboard
- Documents
- Enrollments
- Events
- Follow-Up
- Glossary
- Notifications
- NYC.ID Login
- Referrals
- Reports
- Unit Entry

Reports Overview

Reports are still being finalized within VIVÉ. The first set available are the common reports used across all programs. There are additional programmatic reports that will be announced as they become available.

The Reports Builder

Reports are accessible by all programs from the **Reports** tab on the **Top Menu**. The Report Builder enables you to view your program's client data in several ways.



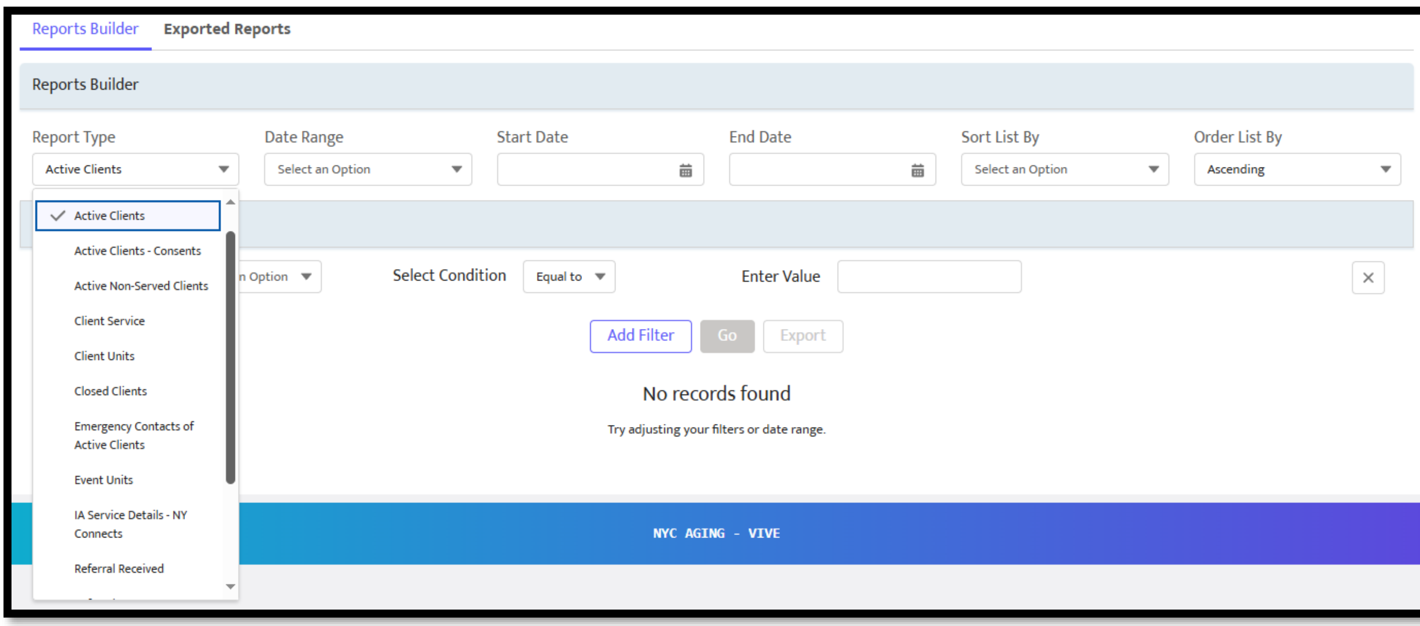
Overview of the Report Tools

- **Reports Builder** = Displays the selections to customize your report
- **Exported Reports** = After selecting the **Export** button, the details of the exported file are listed on this page. Click the **Export Reports** sub-menu link to access the list. More details are below.
- **Report Type** = These are the various reports available and are listed in alphabetical order.
- **Date Range** = An option to select a pre-set data range.
- **Start Date** = Either this will be pre-populated from the pre-set date range, or you can enter a specific date. There is a calendar option if desired.
- **End Date** = Similarly, this will be pre-populated from the pre-set date range or you can enter a specific date. There is a calendar option if desired.
- **Sort List By** = The options within this dropdown change depending upon the report type. For example, select last name and the report will automatically sort in alphabetical order by the client's last name.

- **Order List By** = You have the option to order the list ascending (e.g. where the clients with the last name starting with an "A" are at the top of the list) or descending (e.g. where the clients with the last name starting with "Z" are at the top of the list).
- **Add Filter** = After you have run a report, you can select the **Add Filter** button to create a sub-set of the data. The filters change depending upon the data fields for each report type.
- **Go** = Select the **Go** button to process the report.
- **Export** = Select the **Export** button to download the data across all pages of the report including the column headings. Once downloaded, the report is accessible from the Exported Reports link.

Defining the Report Types

The different report types categorize and present client information to support your program operations. Use the scroll bar at the bottom of the page to scroll right and see all the columns.



Report Types & Their Logic

- **Active Clients** = All clients who have an active enrollment in your program within the selected Date Range Start and End Dates.
  - This report includes demographic information such as Client ID, First & Last Name, DOB, Home & Cell Phone Numbers, Email Address, Home & Mailing Address, NYCHA Facility Name, Community & Council District. Additionally, it includes Assignment, Enrollment Date, Closing Date, Enrollment Status, and NSI Conclusion.

- **Active Clients – Consents** = All clients who have an active enrollment in your program and have a document with the Consent Types: Consent to Collect, Consent to Refer and Revoke Consent, within the selected Date Range Start and End Dates.
  - The fields within this report are: Client ID, First & Last Name, Date Consent Created, Is Verbal Consent, Consent Type, Uploaded Date, Document Type and Document Title.

- **Active Non-Served Clients** = All clients who have an active enrollment in your program but have not received a unit of service from your program within the selected Date Range Start and End Dates. Due to the fields included, this report is not sortable.
  - The fields within this report are: Client ID, First & Last Name, DOB, Home & Cell Phone numbers and Home Address.

- **Client Aggregate Units** = All clients who received at least one unit of service from your program within the selected Date Range Start and End Dates. Units are shown in aggregate by client for the selected timeframe. Due to the fields included, this report is not sortable.
  - The fields within this report are: Client ID, Age, First & Last Name, Home Address, Gender, Marital Status, Lives With, Frail/Disabled, Service Type, Units, Funding Source, and Council & Community Districts.

- **Client Units** = All clients who received at least one unit of service from your program within the selected Date Range Start and End Dates. Due to the fields included, this report is not sortable.
  - The fields within this report are: Client ID, First & Last Name, DOB, Home Address, Home & Cell Phone Numbers, Email, Service Date, Service Type, Unit Source, Funding Source, Units, Amount, Assigned Worker, Enrollment Date and Closing Date.

- **Closed Clients** = All former clients who have a closed enrollment in your program within the selected Date Range Start and End Dates.
  - The fields within this report are: Client ID, First & Last Name, DOB, Home Address, Enrollment & Closing Dates, Enrollment Duration, and Closing Code.

- **Emergency Contacts of Active Clients** = A list of Primary and Secondary Emergency Contacts for all clients with an active enrollment in your program during the selected Date Range Start and End Dates. If a client has multiple Primary or Secondary Emergency Contact, the client will be listed more than once.
  - The fields within this report are: Client ID, Client First & Last Name, Client Home, Cell & Work Phone Numbers, Emergency Contact First & Last Name, Relationship to Contact, Contact Type, Emergency Contact Home, Cell & Work Phone Numbers.

- **Event Units** = A list of all events where the Event Date falls between the selected Date Range Start and End Dates.

  - The fields within this report are: Event Name, Event Type, Date of Occurrence, Event Manager, Total Units, Total Clients, Total Amount, Service Type and Funding Source.

- **IA Service Details – NY Connects** = All Information & Assistance Service Details provided during the Date Range Start and End Dates.
  - The fields within this report are: Client ID, Client First & Last Name, Age, Client Home and Mailing Address, Client Home, Cell & Work Phone Numbers, Email, Service Date, Author, Caller Type, Status, Service Requested, Point of Entry, Knowledge, Topics Discussed, Action Taken, Payor Source, Information Requested, Units, Funding Source and Close IA Record.

- **Referrals Received** = A list of referrals received during the selected Date Range Start and End Dates.
  - The fields within this report are: Client ID, First & Last Name, Referral Created By, Date Referral Received, Referral Source, Referral Status, and Service Requested.

- **Referrals Sent** = A list of referrals sent during the selected Date Range Start and End Date.
  - The fields within this report are: Client ID, First & Last Name, Created By, Referral Date, Referred to, Referral Status, and Service Requested.

- **Served Clients** = A list of all clients served and their status during the selected Date Range Start and End Dates.
  - The fields within this report are: Client ID, First & Last Name, DOB, Home Address, Home & Cell Phone Numbers, Email, Assigned Worker, and Enrollment & Closing Dates.

- **Served Clients – Social Demographics** = A list of all served clients with an active enrollment within your program during the selected Date Range Start and End Dates,
  - The fields within this report are: Client ID, First & Last Name, Martial Status, Frail/Disabled, Lives With, Ancestry, Race/Ethnicity, Primary Language, Non-English Language, Other Non-English Language, Speaks English, Reads English, Understands English, Gender, Transgender, Sex Characteristic Variation, Sexual Orientation, Pronouns, Armed Forces, National Guard, and Reserves.

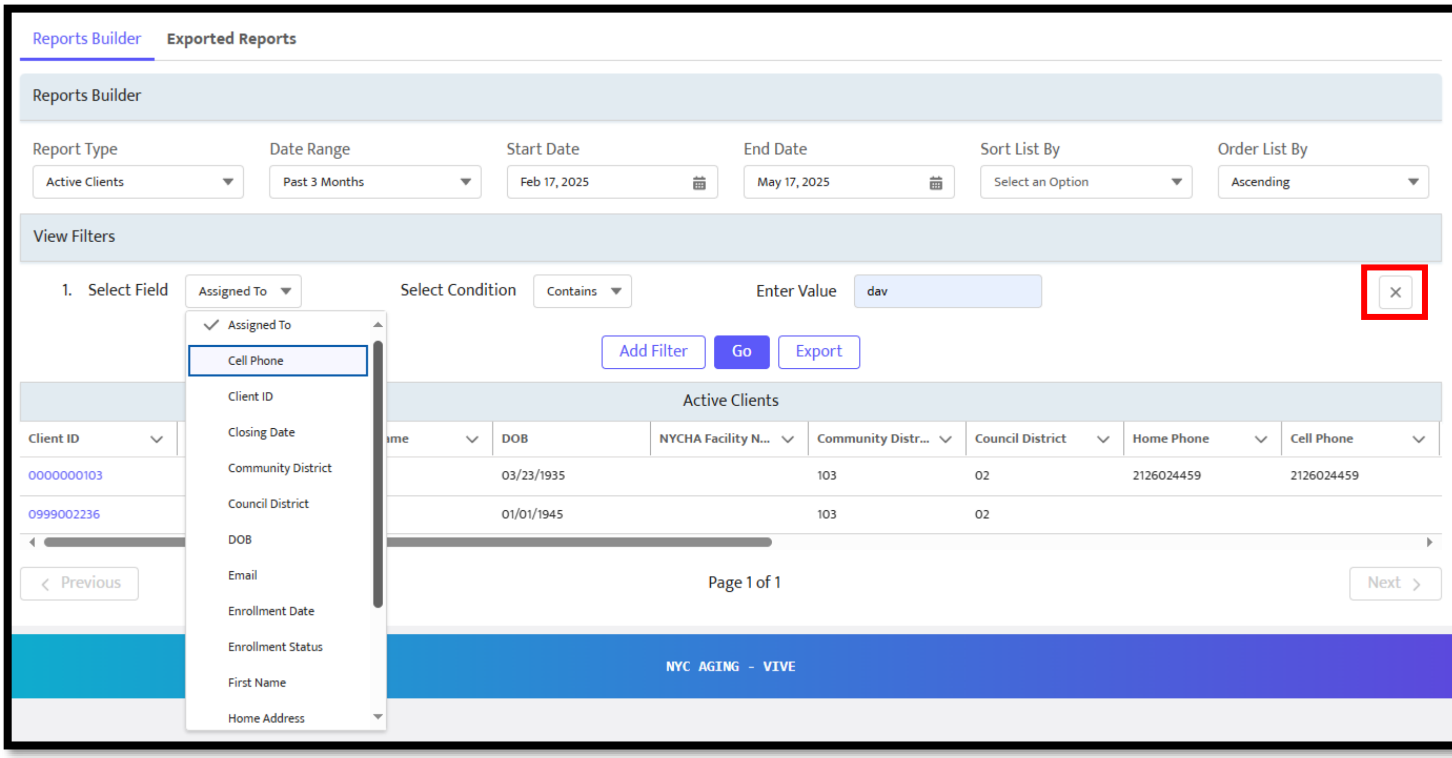
- **Summary Units** = A summary of all service units provided to clients with an active enrollment during the selected Date Range Start and End Dates.
  - The fields within this report are: Service Type, Entry Source, Unit Type, Funder and Total Units.

Filtering Reports

Filtering reports allows you to narrow down your data to focus on specific information. By applying filters you can customize reports to display only the most pertinent data. The data fields you can filter by vary with the report.

NOTE: *Excel is helpful when filtering on multiple fields.*

To Add a filter, first enter the **Report Type** and **Date Range**. Then select the **Add Filter** button to display the filtering options. Select the field, the Condition and Enter the Value.



For example, above the **Report Type** is Active Clients with a Past 3 Month **Date Range**. The filter is on the Assigned to field with the **Condition** Contains and the **Value** dav (partial entries are allowed). This filtering reduced the overall Active Client list from several to two.

- There are multiple Conditions to select from, such as Exact, Contains, Starts With, Ends With, Greater Than and Less Than.
- When you export a filtered report, only the filtered sub-set will be included.
- You can add multiple filters. Additionally, select the **X** button on the right to remove the filter.

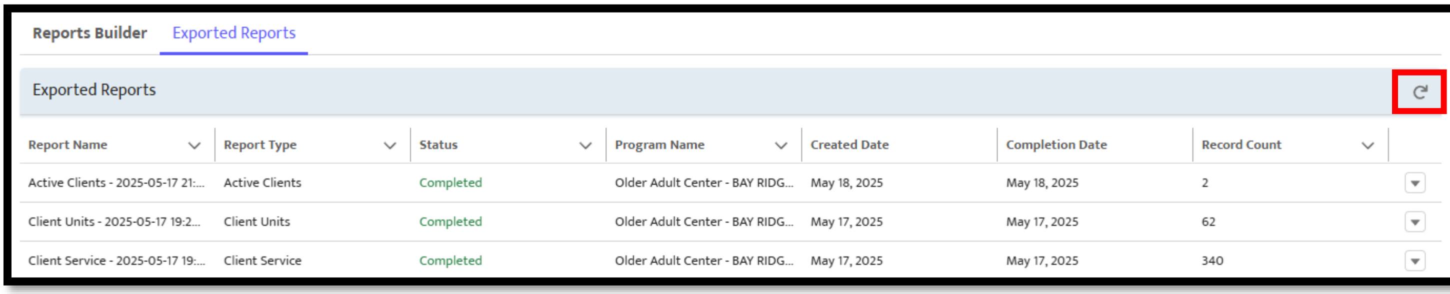
Once you have completed your filtering options, select the **Go** button.

Printing Reports

You can print the reports using your browser's printing functionality.

Exported Reports

Exported reports provide a convenient way to extract data for further analysis, sharing, or record-keeping. These reports capture selected information based on user-defined criteria and can include summaries, detailed records, or filtered views. The reports are exported as CSV files, which easily open as MS Excel documents.



The Exported Results list view contains a few important columns:

- **Report Type** = Differentiates your exported reports.
- **Status** = Depending upon the size of the file, the status may be Processing for a minute or two. Once it is Completed, the arrow box on the first right will display to select download.
- **Record Count** = This helpful value can confirm whether your filtering selection worked.

Downloading Exported Report

Once the exported report's status is complete, select the downward facing arrow button on the far right of the report row.

After selecting the downward facing arrow box, the option to download the report becomes available. After selecting the download option, the report is downloaded to your browser for you to open the file.

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