

VIVÉ READINESS GUIDANCE: Confirming Closing Information - **UPDATED**

Date Issued: **October 9, 2025 - UPDATED**

Subject: Active Clients with Closing Information in their casefile

Programs: [Case Management Agencies](#)

OVERVIEW

- **All active clients who received a unit of service since 7/1/2023 will be migrated from STARS into VIVÉ.**
 - Some of your active clients may have closing information. We need you to review a select list of clients and ensure they have properly closed casefiles so they will migrate smoothly into VIVÉ.
 - If a client has any closing information (closing date, closing code or closing summary), they will be migrated into VIVÉ as inactive. This bulletin describes how to address this.
 - A new STARS Online Portal Report called “Programs with Active Status and Closing Code” is now available (Report ID # 4172). This report was created to assist providers with identifying clients who are active but have a casefile that was previously closed.
 - **This issue must be addressed by October 24, 2025 to avoid any impact on data migration.**
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ISSUE DESCRIPTION

- **Issue:** When clients are migrated into VIVÉ, if their casefile has any closing information (closing date, closing code, or closing summary) then the client will come into VIVÉ as inactive, even if the status in STARS is Active.
 - **Symptoms:** Re-activating a previously inactivated casefile when a client returns without creating a new casefile at a later point in time creates data issues.
 - During migration, VIVÉ uses closing information to distinguish *active* clients from *in-active* clients.
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IMPACT

- **Address Issue BEFORE Migration:**
 - Providers need to resolve these cases before VIVÉ launches or those clients will be migrated into VIVÉ as inactive.
 - **If Issue is NOT Addressed Prior to Migration:**
 - Providers will be unable to sign up these clients for events or enter units because they are inactive.
 - Providers will need to create a new client enrollment and create new event sign-ups in VIVÉ.
 - Existing client assessments and/or forms will be included within the inactive enrollment but will not be editable.
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RESOLUTION PLAN

- Use the STARS Online Portal Report called “Programs with Active Status and Closing Code” (Report 4172) to identify those clients who are active but have closing information within their casefile.
 - On the closing screen in STARS, change the status from “Active” to “Inactive”.
 - Create a new intake and casefile in STARS.
 - Recreate any necessary assessments
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CONTACT INFORMATION

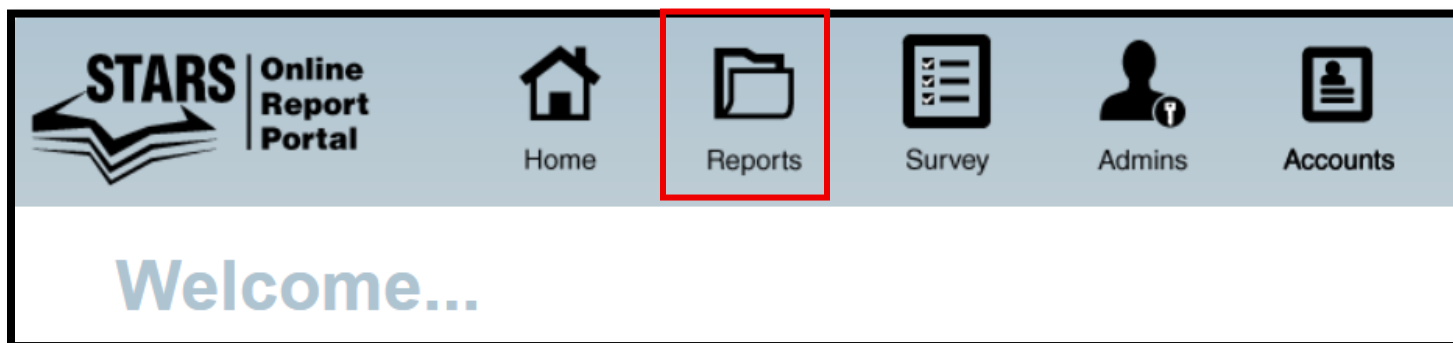
- If you have questions or experience additional issues with VIVÉ, please email VIVESupport@aging.nyc.gov
 - If you have questions about STARS Online Report Portal, please email appsupport@aging.nyc.gov
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INSTRUCTIONS

Below is guidance on completely closing casefiles and re-creating the intake/casefile for clients to ensure proper migration of client information to VIVÉ.

STARS ONLINE PORTAL REPORT PROCESS

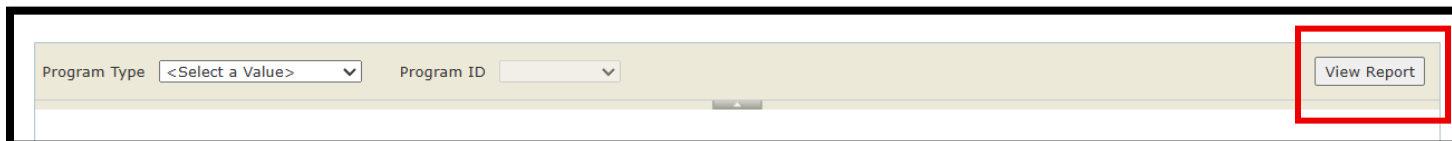
Step 1: Log into STARS Online Portal Report and click on **Reports**.



Step 2: Scroll down to report number “4172”. Select the report “Programs Active Status With Closing Code”.

Select	4171	Activation - Cooling Center Attendance	Activation attendance report for Cooling Centers by Date
Select	4172	Programs Active Status With Closing Code	Programs those have ACTIVE status and have Closing Code In Peerplace.
Select	4173	Caregiver Supplemental Report - VIVE	VIVE Caregiver Supplemental Report

Step 3: Select your **Program Type** and **Program ID** from the dropdown. Click the **View Report** button to generate the list of active clients in your program with a closed casefile



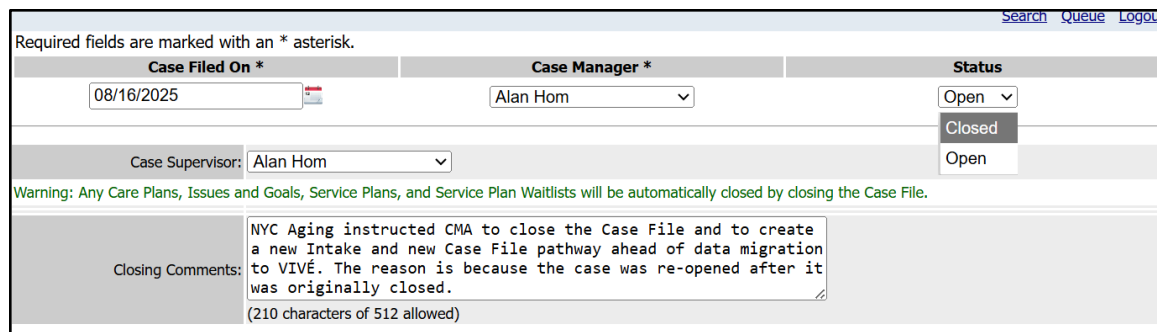
STARS PROCESS

Step 1: Log into STARS and open a client file listed in Report 4172. Go to the **Closing** screen of the **Casefile** and click the **Edit** button.

Step 2: Click on the **Status** dropdown and select “Closed”.

In the **Closing Comments** box, please write the following: *“NYC Aging instructed CMA to close the Case File and to create a new Intake and new Case File pathway ahead of data migration to VIVÉ. The reason is because the case was re-opened after it was originally closed.”*

Click **Save and Exit**.



Step 3: Return to the **Client Profile** and click on the **New Intake** button.

Client Profile Basic Demographics Social History NYC Demographics Annual Client Profile Update COVID19 Vaccination Financial Contacts Emergency Preparedness NY Client Info Mailing Address Address History General Comments Attachments Email Preferences Grant/Revoke Consent to Refer/Share Encounter History Program History Program History - All	Last Name *: Test	
	Middle Initial/Name:	
	Title: Select One	
	Gender: Unspecified	
	Age: 104	
	Map: Map to current address	
	Address Line 1 *: 103-15 Farragut Road	
	City: BROOKLYN	
	Zip: 11236	
	County: Kings	
	Steps:	
	Building: Old Bailey	
	Phone (Home) (###-###-####): 212-200-2000	
	Phone (Work) (###-###-####): 212-400-4000	
	Resides in NYCHA facility: Yes	
	Email Address: testtesttest@yahoo.com	
	Client Screen Alert Date (mm/dd/yyyy):	
	Edit New Referral New Srv. Ticket New Intake Merge Client Exit	

Step 4: After a New Intake form appears, in the Referral Details section, go to the Comments field and enter this comment: "New Intake was created as per NYC Aging Instructions ahead of VIVÉ data migration. Refer to most recent Intake for Information."

Required fields are marked with an * asterisk.

Date(mm/dd/yyyy) *	Currently Assigned To	Status
08/26/2025		Unassigned
Contact *: green, evelyn (Self) v		
If other __?:		
Knowledge of Program:	Select One v	
Client Aware of Referral *: ☐ No ☒ Yes		
Problems:	Abuse/Suspected abuse Adult Care Facility Complaint ADA accessibility issues Assistance with benefits eligibility Budgeting/Bill paying	
Comments:	New Intake was created as per NYC Aging Instructions ahead of VIVÉ data migration. Refer to most recent Intake for Information. (127 characters of 5000 allowed)	

Step 5: From the Intake, click on **Assignment** and assign a Case Manager to the client. Select the **Save** button. Return to **Assignment** and select the **Edit** button. Then select the **New Casefile** button.

When the new **Case File** appears, the “Case Filed On” date will auto-populate to the current date. Leave it as the current date. Do not back-date.

Intake

Referral Details
Attachments
CMA/HDM Intake
Meal Delivery Plan
Delivery Schedule History
APS/Friendly Visiting
NSI
Financial/B&E
Service Plan Waitlist
On Hold
Case Notes
Import Notes
Units Entry
► Assignment
NY Reporting
Event Profile Sign-Up
Closing

Required fields are marked with an * asterisk.

Date(mm/dd/yyyy) *
08/15/2025

Case Manager *: Cheolwon Ryu

Re-Assign Intake: Re-Assign

Save Save & Exit **New Casefile** Cancel

New Case File Details

- Previously completed PHQ-9s and Financial/B&E information will appear within the new Casefile. However, previous case notes, unit entries, cost shares, care plans, and assessments – will remain accessible only within the closed casefile.
- If your program conducts reassessments, you will need to create a new one at that time.
- You will need to recreate the **Care Plan**, **Service Plan**, and **Service Plan Wait List**.
- Create a new **Case Note** as well, with today's date, with the following text: *“NYC Aging instructed CMA to create a new Case file ahead of VIVÉ data migration. Past case notes are found in the most recent Case File.”*
- Any current Meal Delivery Plan will still be active.
- Any current Home Care Service Plan will also still be active.