

SERVICE BULLETIN for Case Management Agency (CMA)/Friendly Visiting (FV)

Bulletin Number: SB-2025-07-22

Date Issued: July 22, 2025

From: VIVÉ Support Team – NYC Aging

Subject: Case Note Sharing

OVERVIEW

- The Case Note Sharing option is automatically enabled by default unless manually unchecked. Its purpose is to allow case notes to be shared with programs where referrals are sent. However, users have expressed concern that this setting may result in confidential information being shared with all programs.
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ISSUE DESCRIPTION

- **Function Affected:** New Case Note, Previous Case Note
 - **Issue:** Users want the automatically enabled to share case notes unchecked.
 - **Symptoms:** The main concern is that other programs will see client confidential information.
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IMPACT

- If case notes are not shared, FV and CMA programs will not be privy to the client's progress or history.
 - For non-CMA and non-FV programs, this checkbox does not impact your case notes.
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WORKAROUND

- For Friendly Visiting and Case Management, all notes previously shared between the two programs should remain accessible. Moving forward, notes will continue to be shared as long as the Case Note Sharing box remains checked.
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RESOLUTION PLAN

- **Status:** This case note sharing only applies to CMA and FV. The system will not allow it to be shared with others.
 - **Please note:** The case notes will not be shared with anyone if you forget to uncheck the box.
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CONTACT INFORMATION

- If you have questions, experience additional issues, or have suggestions, please submit a ticket via the Ticketing Module (Top Menu of VIVÉ / Program Tools / Ticketing Module).
 - Visit the Knowledge Base: <https://vivesupport.cityofnewyork.us> for further guidance.
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ATTACHMENTS

- Not applicable for this release.