

Managing Anonymous Clients

This is a program-by-program how-to guide on capturing basic demographics for clients within VIVÉ.

Overview:

The programs below cannot create anonymous clients, ***under any circumstance***.

- Friendly Visiting
- Home Care
- Home Delivered Meals

The below programs cannot create anonymous clients and must meet certain minimum information criteria (as outlined below):

- NORCs
- Case Management
- Social Adult Day

The below programs can log units for anonymous clients BUT ONLY through event profiles:

- Caregiver

The below programs can log anonymous units and create anonymous profiles by following the guidance below. Under appropriate circumstances (as outlined below) they may also log anonymous units through event profiles.

- Elder Justice
 - Legal Assistance
 - Older Adult Centers
 - NY Connects
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FRIENDLY VISITING, HOME CARE, and HOME DELIVERED MEALS

- With all clients referred from a Case Management Agency, there cannot be anonymous clients or units.

NORC

- **Policy:**
 - Basic information (first and last name, date of birth, and address) is required for all services that include an intake or assessment

CASE MANAGEMENT

- **Policy:**
 - Basic information (first and last name, date of birth, and address) is required for all services. There cannot be anonymous clients.
- **Procedure:**
 - When creating a new client, enter minimum details (first and last name, date of birth, and address)

SOCIAL ADULT DAY

- **Policy:**
 - Basic information (first and last name, date of birth, and address) is required for all services. There cannot be anonymous clients.

- **Procedure:**
 - When creating a new client, enter minimum details (first and last name, date of birth, and address)

CAREGIVER

- **Policy:**
 - Information & Assistance can be provided anonymously, and units can be entered within Event Profiles.
 - Attendance at public information activities can be entered as a lump sum within Event Profiles
- **Procedure:**
 - When creating an “Information and Assistance” only new client, enter minimum details (first and last name, date of birth, and address) Enter units via Client Profile.
 - To record **bulk anonymous** “Information & Assistance” units, use Event Profile to create an event using Service Type: “Information” or “Assistance.” Enter the total number of units for each day.
 - To record units for “Public Information” activities, use Event Profile and select the appropriate service type. Enter the aggregate number of people attending the activity and the unit of service.

ELDER JUSTICE

- **Policy:** Can enter anonymous clients using a de-identified convention as outlined in the NYC Aging Pre-Consent Protocol for New Clients, issued 1/31/25.
- **Temporary Procedure:** when entering an anonymous client, use the convention:
 - First Name: use the assigned de-identified client ID from your program’s Pre-Consent Client Spreadsheet (e.g. CASC007)
 - Last Name: use the program’s name
 - Date of Birth: at least 60 years old (01/01/1965)
 - Address: Use the site’s address (120 Stuyvesant Place, Staten Island, NY 10301)
 - Once informed consent is obtained, programs can update the client profile information in STARS to reflect the client’s name and address.
- **Long Term Plan:** OIT will design an anonymous module within VIVÉ that will eliminate the need for the current separate system tracking the de-identified clients and the redundant efforts.
This will be carefully designed with the Elder Justice team.

LEGAL ASSISTANCE

- **Policy:**
 - Can enter anonymous clients using a de-identified convention as outlined herein.
- **Temporary Procedure:** when entering an anonymous client, use the convention:
 - First Name: use the assigned de-identified client ID that is generated by Legal Server
 - Last name: use the program’s acronym (i.e., JASA, BLS, or BxLS)
 - Date of Birth: at least 60 years old (01/01/1965)

- Address: use the site's address
- If client provides consent later, programs can update the client profile information to reflect the client's name, address, and DOB
- **Long Term Plan:** OIT will design an anonymous module within VIVÉ that will eliminate the need for the current separate system tracking the de-identified clients and the redundant efforts. This will be carefully designed with the Legal Assistance team.

OLDER ADULT CENTER

- **Policy:**
 - Basic information (first and last name, date of birth, and address) is required before entering the client profile
 - Information & Referral can be provided anonymously
 - Congregate Meals, including Grab & Go, can be provided anonymously
- **Meal Procedure:**
 - Enter anonymous meals served within Event Profile/Unit Entry.
- **Temporary I&R Procedure:** when entering an anonymous client, use the convention:
 - First Name: Program Type (OAC)
 - Last Name: Sponsor, hyphen, Site name (eg. JASA-Bartow)
 - Date of Birth: 01/01/1901
 - Address: Program's address (2049 Bartow Avenue, Bronx, NY 10475)
- **Long Term I&R Plan:** OIT will design an anonymous module that will streamline entry and will enhance reporting capacity. This will be carefully designed with the OAC team.

NY CONNECTS

- **Policy:** Providers can enter anonymous clients using a program-by-program convention.
- **As per NY SOFA:** If provider confirms name and date of birth for client (address can be entered as site address), a profile can be created and an anonymous entry is not necessary.
- **Temporary Procedure for Anonymous Clients:** when entering an anonymous client, use the convention:
 - First Name: Use the Provider's initials (HG = Hudson Guild)
 - Last Name: NY Connects
 - Date of Birth: 01/01/1901
 - Address: Program's address (119 9th Avenue, NY, NY 10011)
- **Long Term Plan:** OIT will design an anonymous module that will streamline entry and will enhance reporting capacity. This will be carefully designed with programs.