

Backdate a Unit Entry

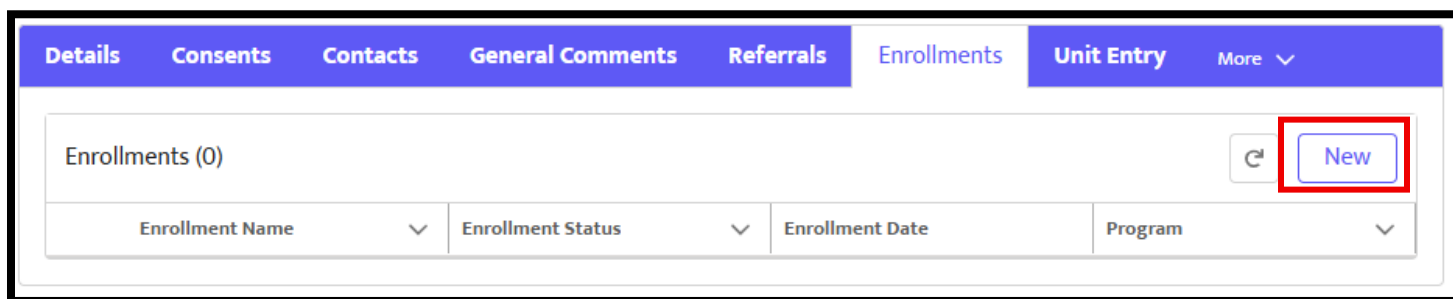
To assist you and your program with backdating units, NYC Aging created this solution. You can update an event signup whether the client is new or already enrolled and active. You can continue using this process moving forward.

Key Reminders — Please Ensure the Following:

- If the client is new, follow the steps in [Client Profile](#) to create a new client profile.
- If a new event is needed, scroll down to [Create an Event](#).
- **Client Enrollment & Event Date**
 - The client enrollment date **must** be at least the date of the event or earlier.
- **Event Signup**
 - The client's Signup date **must** be on or before the date of the event. You cannot enter a Signup date before the client's enrollment date.
 - The client's Signup date cannot be changed in the enrollment section of their record. It can ONLY be changed in the Event Profile.

Client Enrollment

Step 1: From **Client Details Menu**, select **Enrollments** tab then select the **New** button and the **Create Enrollment** pop-up will appear.

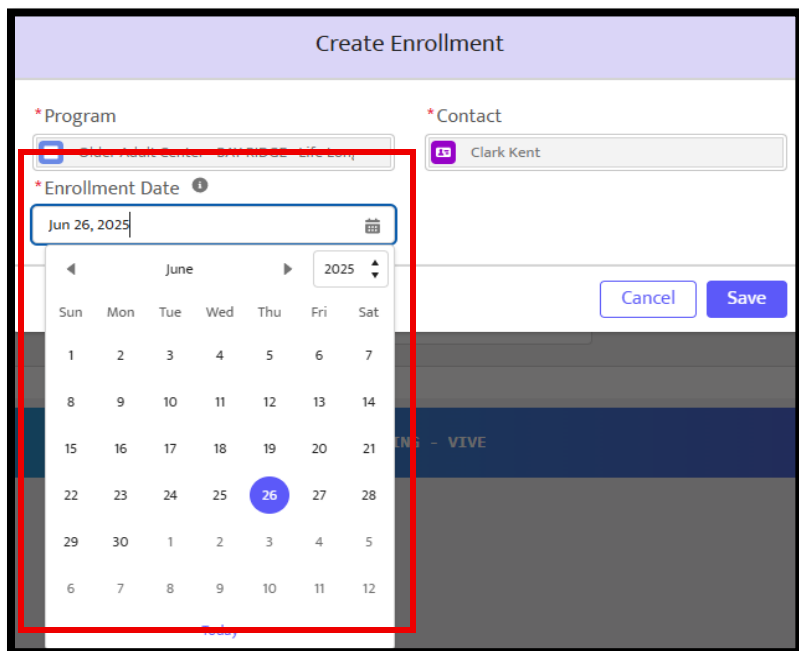


The screenshot shows the 'Client Details Menu' with tabs for Details, Consents, Contacts, General Comments, Referrals, Enrollments, and Unit Entry. The 'Enrollments' tab is selected. Below the tabs, there is a section titled 'Enrollments (0)' with a refresh icon and a 'New' button highlighted with a red box. Below this is a table with columns: Enrollment Name, Enrollment Status, Enrollment Date, and Program.

Enrollment Name	Enrollment Status	Enrollment Date	Program
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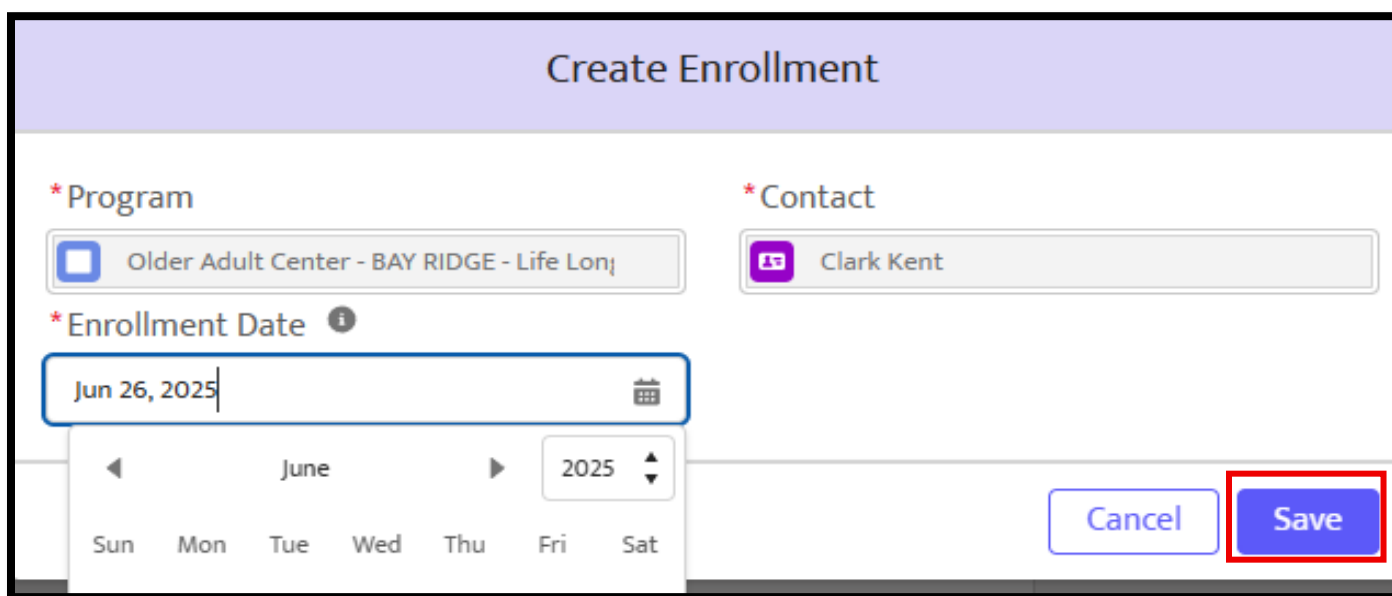
(Scroll down for **More**)

Step 2: You can backdate **Enrollment Date** by selecting the calendar icon or typing in the date. Enrollment can be set to a past date but not a future one.



The screenshot shows the 'Create Enrollment' form. The 'Enrollment Date' field is highlighted with a red box. The date 'Jun 26, 2025' is entered in the field. A calendar dropdown is open, showing the month of June 2025. The date '26' is selected. The 'Program' field is set to 'Older Adult Center - BAY RIDGE - Life Long' and the 'Contact' field is set to 'Clark Kent'. The 'Save' button is visible.

Step 3: Confirm all information is correct before selecting **Save**. The enrollment details for the newly enrolled (or previously enrolled) client will now be displayed.



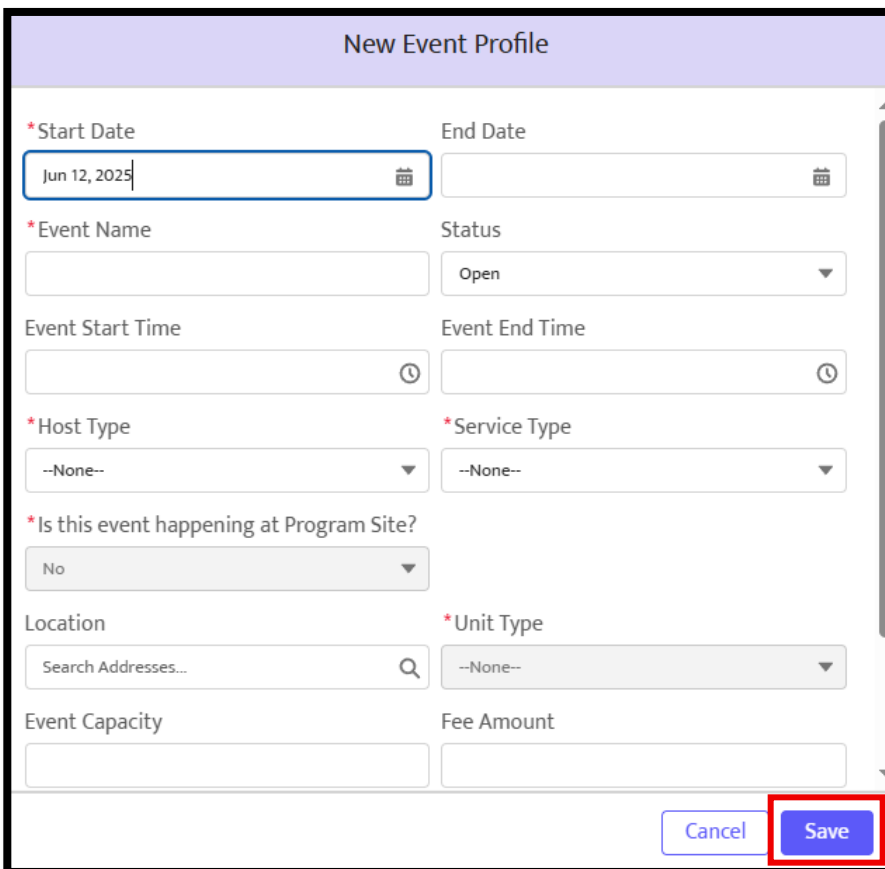
The screenshot shows the 'Create Enrollment' form. The 'Enrollment Date' field is highlighted with a blue box. The date 'Jun 26, 2025' is entered in the field. A calendar dropdown is open, showing the month of June 2025. The date '26' is selected. The 'Program' field is set to 'Older Adult Center - BAY RIDGE - Life Long' and the 'Contact' field is set to 'Clark Kent'. The 'Save' button is highlighted with a red box.

Create an Event

To capture the units for your activities, you will need to create a new event for each activity that occurred on those days.

Go to the **Program Tools, Event Profile** then **New Event Profile** button.

Enter the date of the event for the Start Date. Complete the required fields and select the **Save** button.



New Event Profile

* Start Date: Jun 12, 2025 | End Date: |

* Event Name: | Status: Open |

Event Start Time: | | Event End Time: |

* Host Type: --None-- | * Service Type: --None-- |

* Is this event happening at Program Site?: No |

Location: Search Addresses... | * Unit Type: --None-- |

Event Capacity: | Fee Amount: |

Cancel | **Save**

(Scroll down for **More**)

Signup and Change Client's Sign Up Date

Step 1: From the list view of **Event Profile**, click on your Event Name link.

The screenshot shows the VIVÉ system interface. At the top, there's a navigation bar with links like Client Search, Referral Queue, Program Tools, Admin Tools, Reports, and Support. Below this, a message indicates the user is logged in as 'Connects Admin' and working in the 'Older Adult Center - BAY RIDGE - Life Long' program. The main section is titled 'Event Profile' and contains a sub-menu with options like Monthly Unit Summary, Scheduled Trips, Drivers/Vehicles List, Activity Tracker, Wellness Volunteer, and Survey Invitation Links. A table lists active events, with the following data:

Event Name	Host Type	Event Type	Unit Type	Event Start Date	Event End Date
1 Balance class FY24	In-Person and Virtual	Units by Client	Participant	04/01/2024	06/30/2043
2 Bay Ridge Rocks FY24	In-Person	Units by Client	Group Session	07/01/2023	06/30/2043
3 Cellphone & Tech Help FY24	In-Person	Units by Client	Group Session	07/01/2023	06/30/2043
26 Le Blast Fitness FY24	In-Person	Units by Client	Participant	06/01/2024	06/30/2043

The row for 'Le Blast Fitness FY24' is highlighted with a red box.

Step 2: From the Details of your event, click on the sub-menu **Event Signup**.

The screenshot shows the 'Event Profile' details for 'Le Blast Fitness FY24'. The event information is displayed as follows:

Host Type	Event Type	Unit Type	Start Date	End Date
In-Person	Units by Client	Participant	6/1/2024	6/30/2043

Below this, there are three sub-menus: 'Details', 'Event Signup' (highlighted with a red box), and 'Unit Entry'. The 'Event Signup' sub-menu is selected, showing the event name 'Le Blast Fitness FY24' and the start date '6/1/2024'.

Step 3: From **Event Signup**, search for the client.

The screenshot shows the 'Event Signup' page for 'Le Blast Fitness FY24'. The event information is displayed as follows:

Host Type	Event Type	Unit Type	Start Date	End Date
In-Person	Units by Client	Participant	6/1/2024	6/30/2043

Below this, there are three sub-menus: 'Details', 'Event Signup' (selected), and 'Unit Entry'. The 'Event Signup' sub-menu is selected, showing the event name 'Le Blast Fitness FY24' and the start date '6/1/2024'. A search bar is visible, with the text 'clark' entered and highlighted with a red box.

VIVÉ Knowledge Base – Backdate a Unit Entry

Step 4: On the Event Signup List View, select the drop down arrow to the far right. Select Edit.

Event Profile
Barbara Lunch

Host Type: In-Person | Event Type: Congregate | Unit Type: Meal | Start Date: 9/26/2025 | End Date:

Details | **Event Signup** | Unit Entry

Active Event Signup

Buttons: Scan QR Code, Edit

Client Name	Enrollment Start Date	Enrollment Status	Event Signup Date	Event Signup End Date	Signup Status
Bibi Client	10/03/2025	Active	10/09/2025		Active
Billy Batson	07/27/2025	Active	09/26/2025		Active
Bobbi Client	09/04/2025	Active	09/26/2025		Active

Step 5: **Edit** Event Signup date to enrollment date. **Note:** you can't enter a date before the client's enrollment date. Make sure to change the enrollment date for all clients for which this is applicable. Select Save.

Edit Event Signup

* Event Signup Date

Jun 10, 2025

Buttons: Cancel, Save

Step 6: Select Unit Entry. Enter the **Date of Occurrence** for the event. For this scenario, we are using June 10th.

Event Profile
informational

Host Type: In-Person and Virtual | Event Type: Units by Client | Unit Type: Hour | Start Date: 9/9/2025 | End Date:

Details | **Unit Entry** | Event Signup

Active Event Signup

Buttons: Scan QR Code, Edit

Client Name	Enrollment Start D...	Enrollment St...	Event Signup Date	Event Signup End ...	Signup Status
spike john	11/12/2025	Active	11/17/2025		Active
Vishnu Murthy	09/10/2025	Active	09/16/2025		Active

Showing 1 of 1 Page(s) | Navigation: << First, < Previous, Next >, Last >> | Total Records: 2

last Updated: 1/12/2026

Step 7: Client is listed. Pick Funding Source and check Attended. Then select **Save**.

The screenshot shows the 'Unit Entry' form with the following sections:

- Event Details:** Event Profile (Le Blast Fitness FY24), Event Location, Fee Amount (\$0.00), Event Type (Units by Client), Unit Type (Participant), and Event Manager.
- Unit Entry Details:** *Date of Occurrence (Jun 10, 2025), *Status (Draft), Total Units, and Total \$.
- Filter & Auto Fill:** Name, Funding Source (NYC Aging Funded Service), Units (0.00), Amount (0), and a 'Scan QR Code' button.
- Client List:** A table with columns: Name, Date of Birth, Gender, Home Address, Enrollment Status, Funding Source, Units, Amount, and Attended?.

The 'Client List' table contains one entry:

Name	Date of Birth	Gender	Home Address	Enrollment Status	Funding Source	Units	Amount	Attended?
Clark Kent	01/31/1945		22-30 26 ST, FIRST FLOOR, QUEENS, NY 11105	Active	NYC Aging Funded Service	1.00	0	<input checked="" type="checkbox"/>

At the bottom of the form, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a red box.

Thank you!

If you have any questions, please contact by submitting a ticket through the [Ticketing Module](#) under **Program Tools**.

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](#)