# 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**

  o The client enrollment date **must** be at least the date of the event or earlier.

- **Event Signup**

  o 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.

  o 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.*
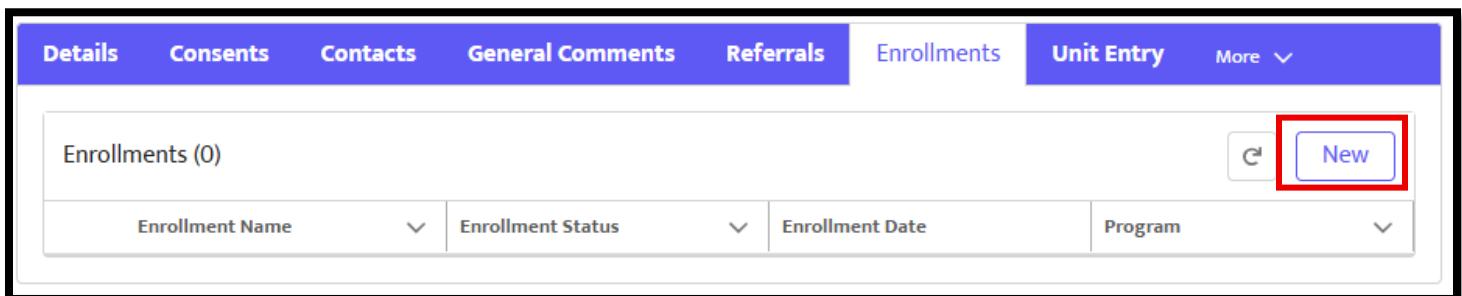

(Scroll down for **More**)

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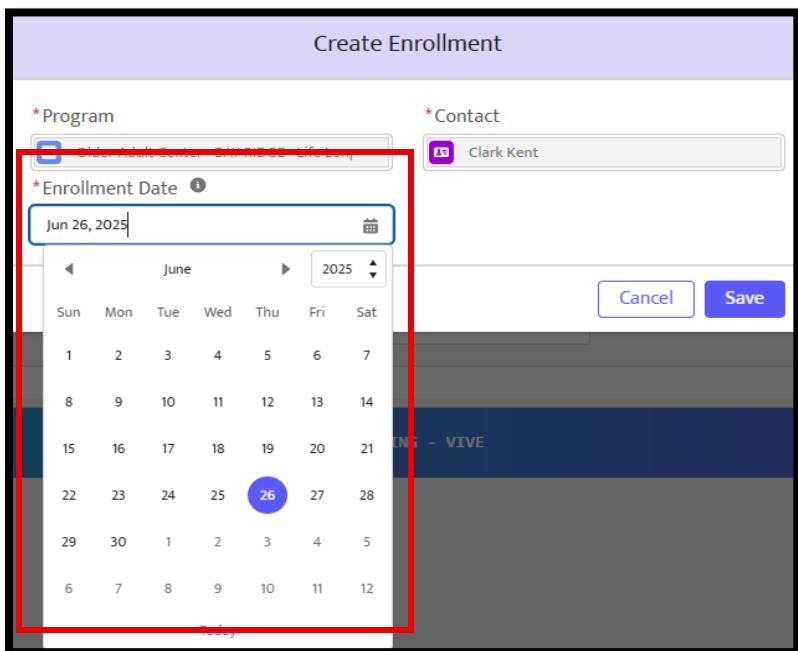
Step 3: Confirm all information is correct before selecting **Save.** The enrollment details for the newly enrolled (or previously enrolled) client will now be displayed.
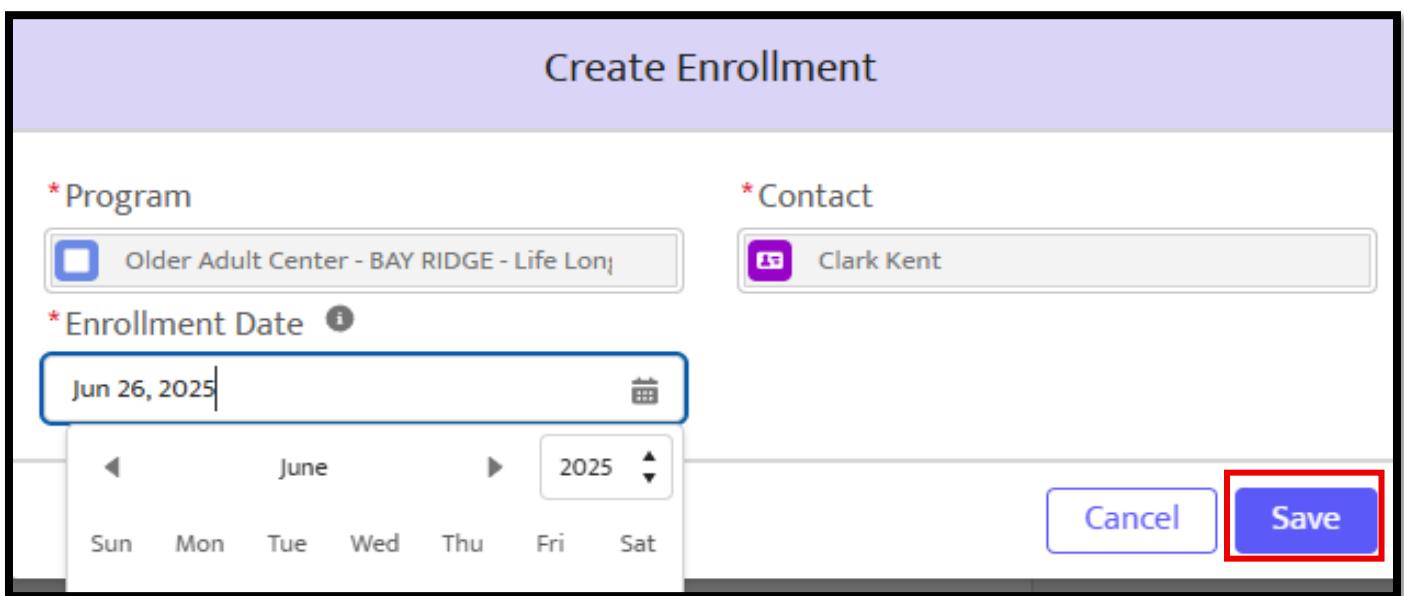
Create an Event

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.

(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.

Step 2: *From the Details of your event, click on the sub-menu* ***Event Signup***.
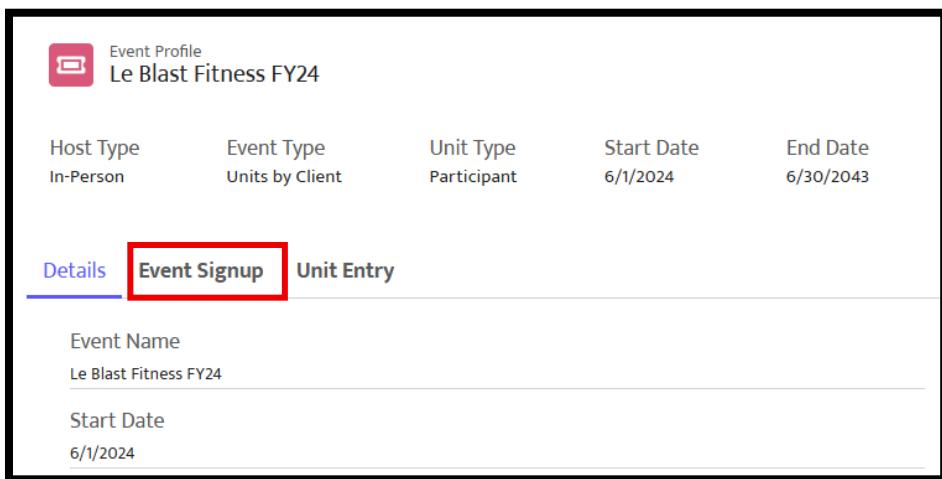
Step 3: *From* ***Event Signup****, **search*** *for the client.*

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

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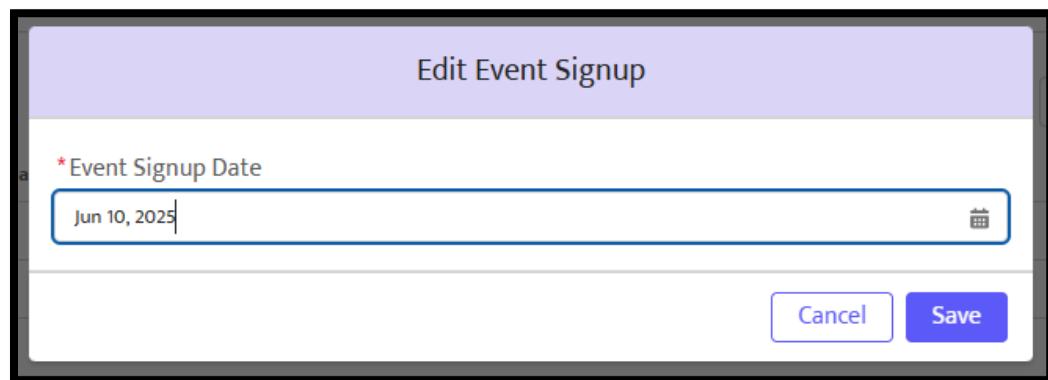
Step 6: *Select Unit Entry. Enter the **Date of Occurrence** for the event. For this scenario, we are using June 10th.*

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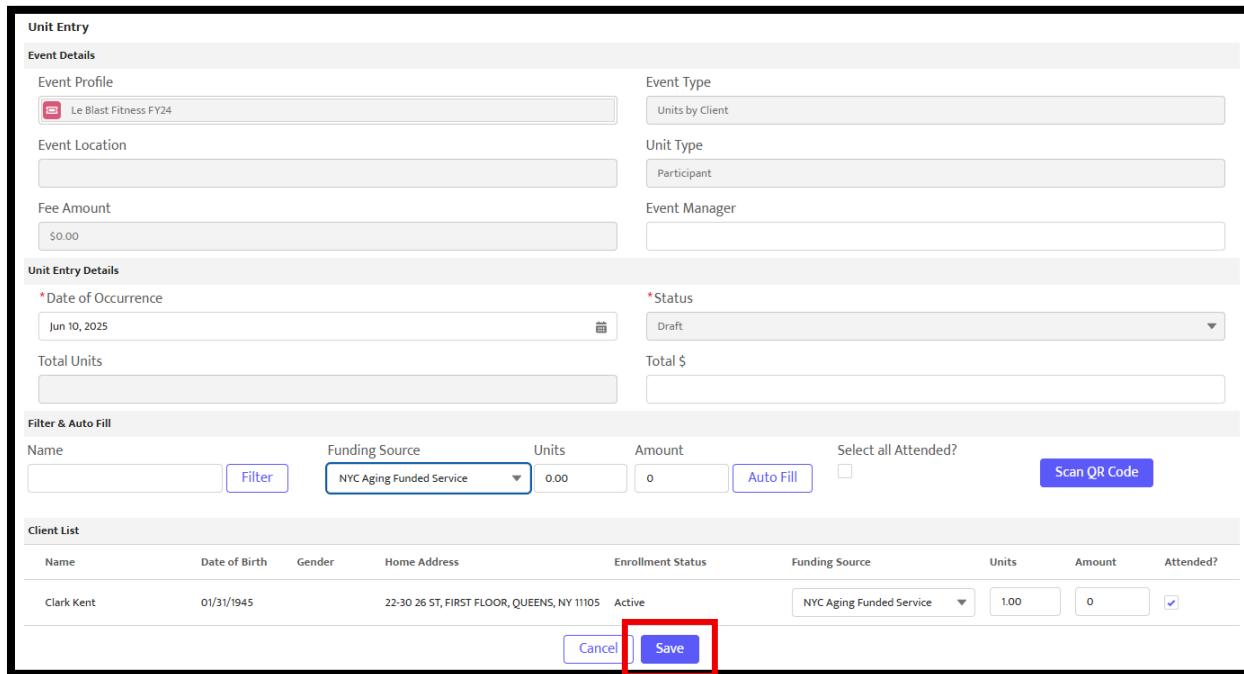
Thank you!

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