

Backdate a Unit Entry

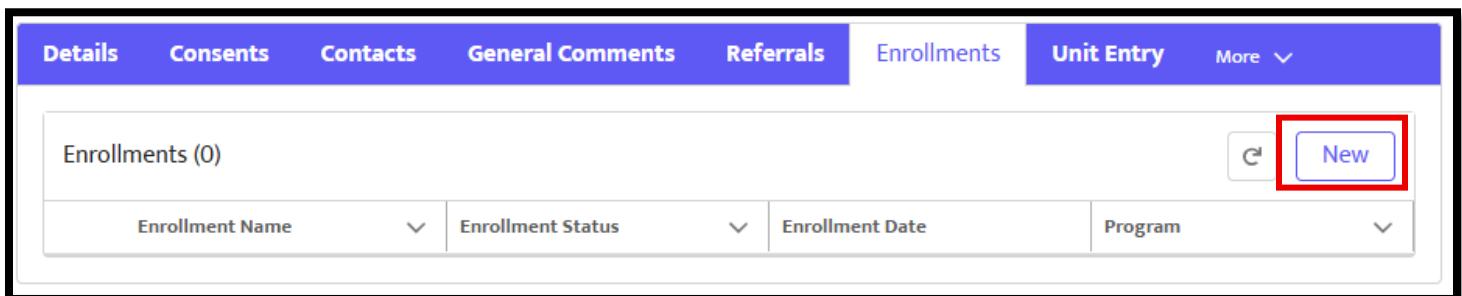
To assist you and your program with backdating units, NYC Aging created this solution. You can update an event signup whether the client is new or already enrolled and active. You can continue using this process moving forward.

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.

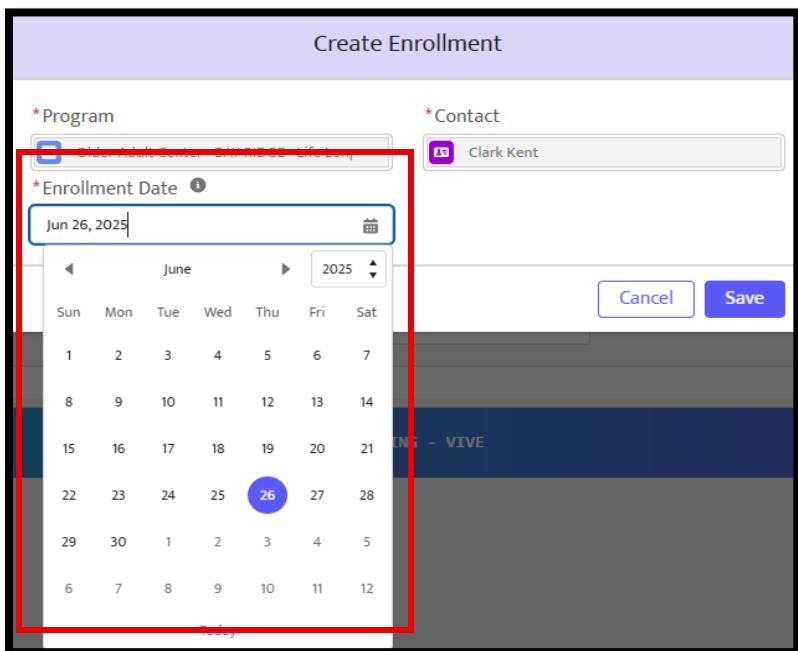
Client Enrollment

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

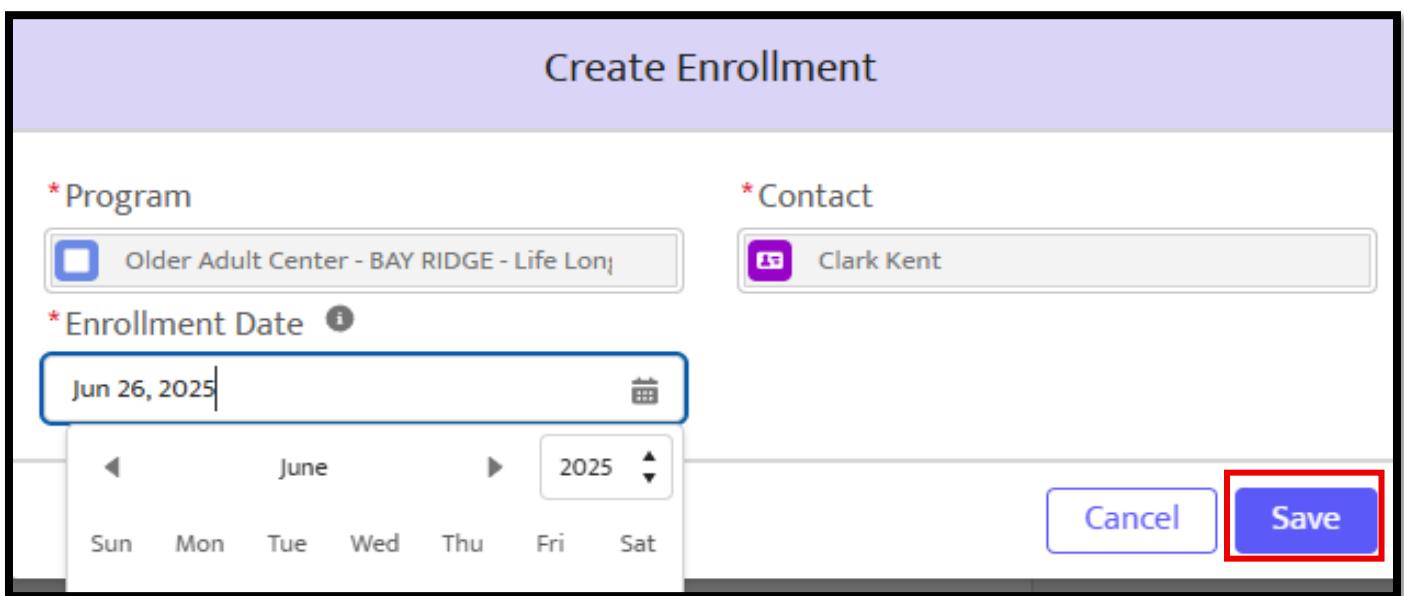


(Scroll down for **More**)

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.

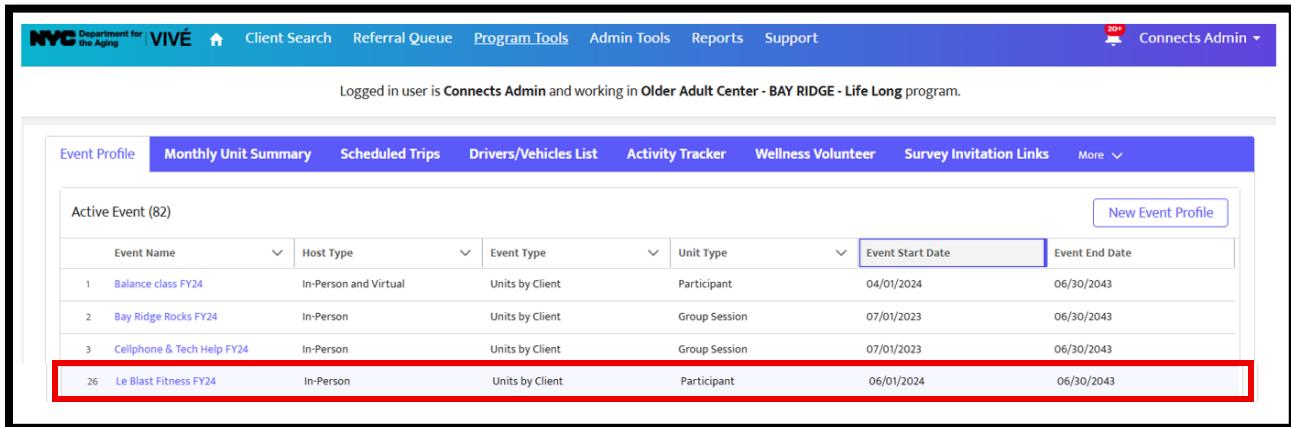
New Event Profile

*Start Date	End Date
Jun 12, 2025	
*Event Name	Status
	Open
Event Start Time	Event End Time
*Host Type	*Service Type
--None--	--None--
*Is this event happening at Program Site?	
No	
Location	*Unit Type
Search Addresses...	--None--
Event Capacity	Fee Amount
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

(Scroll down for **More**)

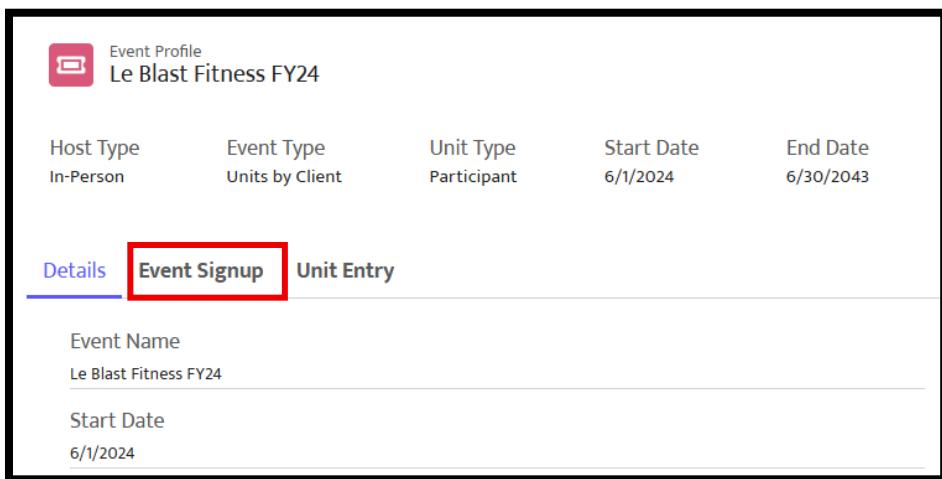
Signup and Change Client's Sign Up Date

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



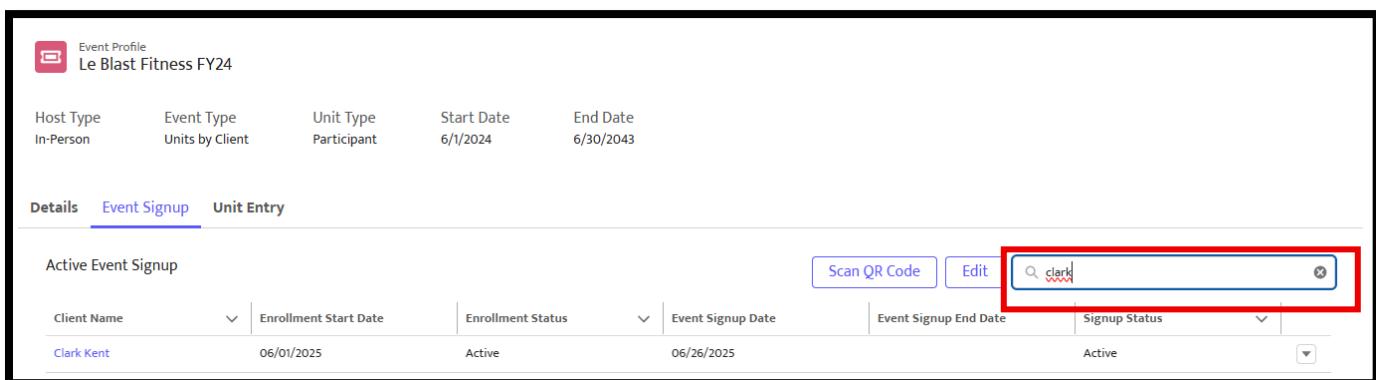
The screenshot shows the 'Event Profile' section of the VIVÉ software. The top navigation bar includes 'Client Search', 'Referral Queue', 'Program Tools', 'Admin Tools', 'Reports', and 'Support'. A purple header bar displays the user as 'Connects Admin' and the location as 'Older Adult Center - BAY RIDGE - Life Long program'. Below this, a table lists 'Active Event (82)'. The row for 'Le Blast Fitness FY24' is highlighted with a red box. The table columns are: Event Name, Host Type, Event Type, Unit Type, Event Start Date, and Event End Date. The data for 'Le Blast Fitness FY24' is: In-Person and Virtual, Units by Client, Participant, 04/01/2024, and 06/30/2043.

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



The screenshot shows the 'Event Signup' sub-menu for the 'Le Blast Fitness FY24' event. The top navigation bar shows the event name. Below it, event details are listed: Host Type (In-Person), Event Type (Units by Client), Unit Type (Participant), Start Date (6/1/2024), and End Date (6/30/2043). The 'Event Signup' tab is selected and highlighted with a red box. Below the tabs, there are fields for 'Event Name' (Le Blast Fitness FY24) and 'Start Date' (6/1/2024).

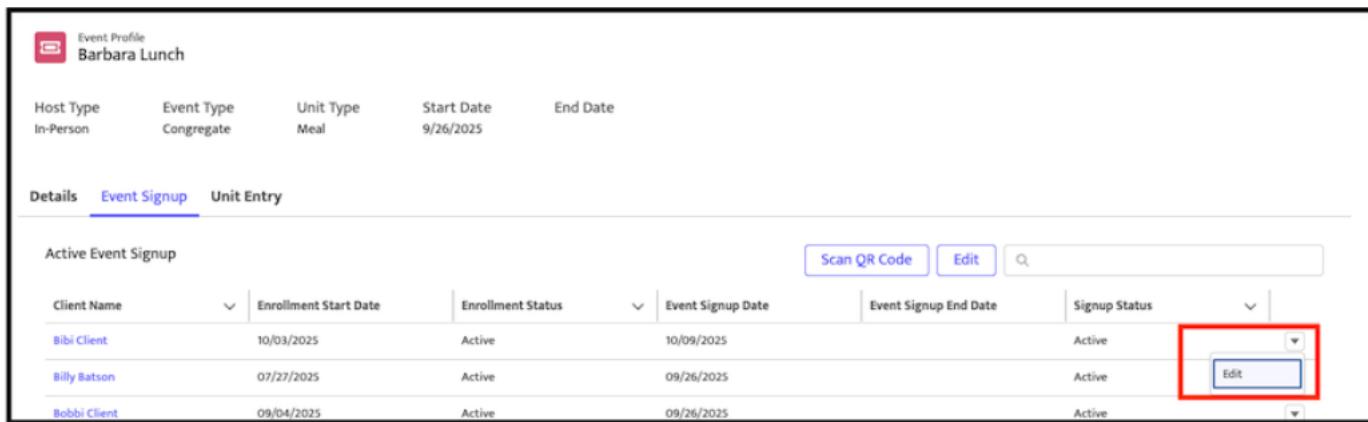
Step 3: From **Event Signup**, search for the client.



The screenshot shows the 'Event Signup' sub-menu for the 'Le Blast Fitness FY24' event. The top navigation bar shows the event name. Below it, event details are listed: Host Type (In-Person), Event Type (Units by Client), Unit Type (Participant), Start Date (6/1/2024), and End Date (6/30/2043). The 'Event Signup' tab is selected. Below the tabs, there is a search bar with the text 'Clark Kent' and a red box highlighting the search input field. Other search filters include 'Client Name' (Clark Kent), 'Enrollment Start Date' (06/01/2025), 'Enrollment Status' (Active), 'Event Signup Date' (06/26/2025), 'Event Signup End Date', and 'Signup Status'.

VIVÉ Knowledge Base – Backdate a Unit Entry

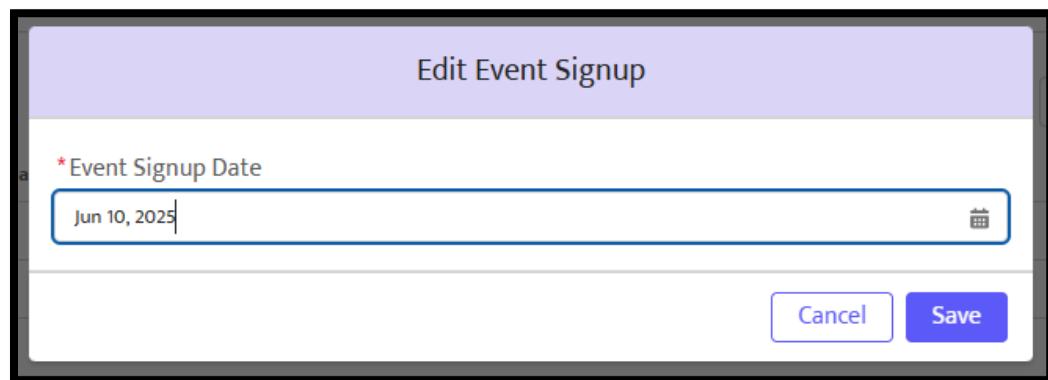
Step 4: On the Event Signup List View, select the drop down arrow to the far right. Select Edit.



The screenshot shows the 'Event Signup' tab selected in the navigation bar. Below it is a table titled 'Active Event Signup' with columns for Client Name, Enrollment Start Date, Enrollment Status, Event Signup Date, Event Signup End Date, and Signup Status. The 'Edit' button in the last column of the first row is highlighted with a red box.

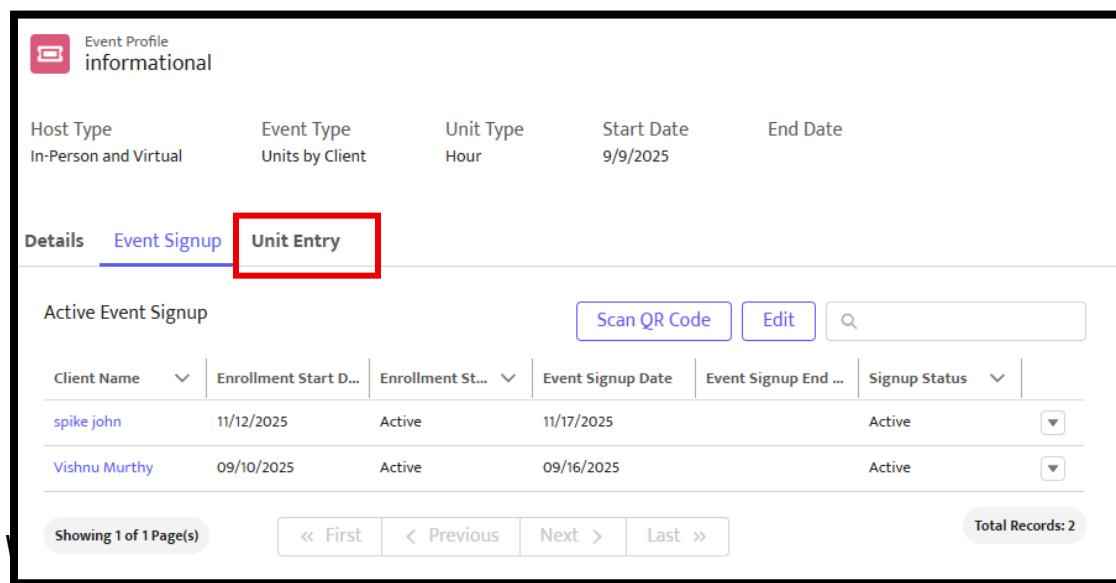
Client Name	Enrollment Start Date	Enrollment Status	Event Signup Date	Event Signup End Date	Signup Status	Edit
Bibi Client	10/03/2025	Active	10/09/2025		Active	Edit
Billy Batson	07/27/2025	Active	09/26/2025		Active	
Bobbi Client	09/04/2025	Active	09/26/2025		Active	

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.



The dialog box is titled 'Edit Event Signup'. It has a single input field for 'Event Signup Date' containing 'Jun 10, 2025'. Below the input field are 'Cancel' and 'Save' buttons.

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

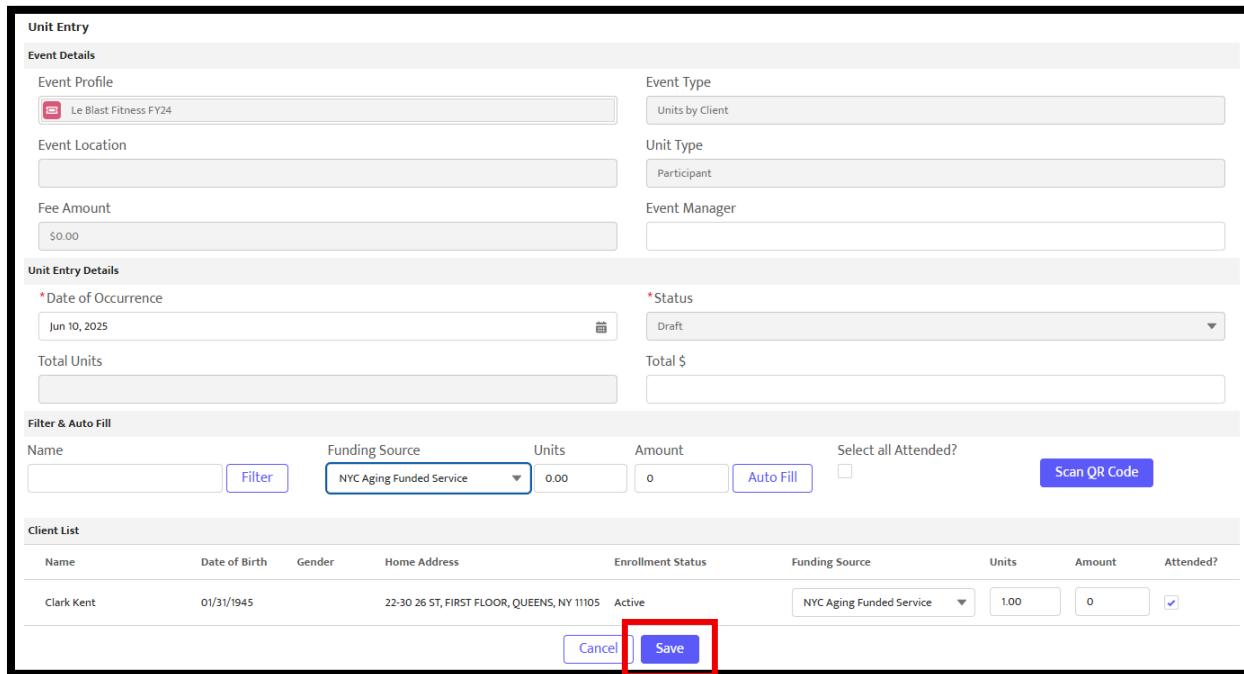


The screenshot shows the 'Unit Entry' tab selected in the navigation bar. Below it is a table titled 'Active Event Signup' with columns for Client Name, Enrollment Start Date, Enrollment Status, Event Signup Date, Event Signup End Date, and Signup Status. The 'Unit Entry' tab is highlighted with a red box.

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

At the bottom of the page, there are navigation buttons for 'First', 'Previous', 'Next', and 'Last', and a message 'Showing 1 of 1 Page(s)'. On the right, it says 'Total Records: 2' and '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. In the 'Client List' section, there is one client listed: Clark Kent, with a Date of Birth of 01/31/1945, Home Address of 22-30 26 ST, FIRST FLOOR, QUEENS, NY 11105, and Enrollment Status of Active. The 'Funding Source' is set to 'NYC Aging Funded Service'. The 'Attended?' checkbox is checked. The 'Save' button at the bottom of the list 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](#).

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