

[Return to VIVÉ Knowledge Base](#)

## The VIVÉ Legal Assistance for Older New Yorkers Reference Guide

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VIVÉ is a client management system designed by NYC Aging to support NYC Aging contractors in managing their client interactions and reporting on services provided. This reference guide provides instructions on using the **Legal Assistance module of VIVÉ**. Follow the links below to navigate to sections of this document or external references.

You may have accessed this guide from the VIVÉ Knowledge Base or from a program specific reference guide. At the beginning and end of this document is a link to return to the [VIVÉ Knowledge Base](#). Or you can use your browser's back button to return to a program reference guide.

This guide provides navigational and functional instructions. For assistance with program operations or policy, please contact to your program officer or view [NYC Aging's Program's Standards](#).

In this guide you will learn about:

- Legal Assistance Flow
- Consent
- Client Profile
- Details Tab
  - Sub-Details: Basic Demographics
  - Sub-Details: Social Demographics
  - Sub-Details: Financials
- Client Enrollment
  - Entering Client Units
  - Editing Client Units
  - Voiding Client Units
  - Entering Case Type and Service Levels (Legal Assistance Form)
- Closing Enrollment
- Event Unit Entry
  - Entering Anonymous Units
- Monthly Unit Summary
  - Reports
- Access Assistance with VIVÉ and the VIVÉ Knowledge Base

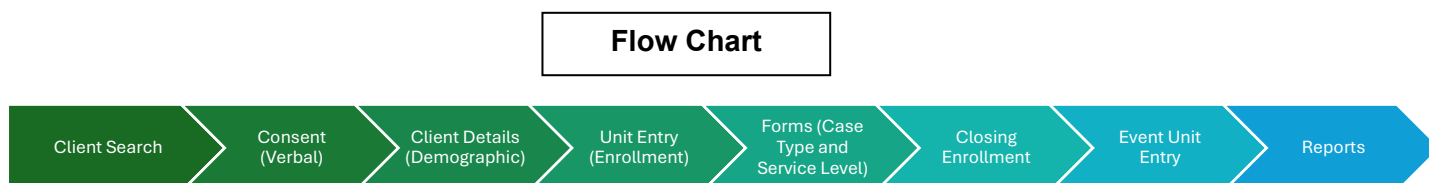
In addition to these instructions, there are the following common guides:

- [Basic Navigation](#)
- [Case Notes](#)
- [Client Profile](#)
- [Client Search & Initial Data Entry](#)
- [Contacts](#)
- [Dashboard](#)
- [Enrollments](#)
- [Events](#)
- [Follow-Up](#)
- [Glossary](#)
- [NYC.ID Login](#)
- [QR Code Scanning](#)
- [Referrals](#)
- [Reports](#)
- [Unit Entry](#)

## Legal Assistance Flow

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The above flow diagram illustrates the navigation processes for key aspects of your work. This diagram provides a general overview of the steps involved in completing key tasks, while also showcasing the various sections of VIVÉ. Detailed instructions on how to enter information will be provided in each of the sections.



## Consent

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Legal Assistance providers may maintain copies of client consent documents in their own case management systems and are not required to upload these consents into VIVÉ. However, because all client profiles require a record of consent, in order to save or view a client profile, providers will be required to check the box that they have obtained consent to collect data from the client.

**New Contact: Client**

**Consent**

Have you received consent to collect data from the client?

☐

**Contact Type**

☒ Client ☐ Contact ☐ Professional

First Name  
gfnfg

Client ID

☐ Search by address?

**Search** **Scan QR Code**

To enable the 'New Client' button, confirm that no matching results were found.

☒ Yes, I have reviewed the results and confirm that no matching results were found.

**New Client**

**Cancel** **Save**

## Client Profile

The Client Profile is the summation of basic details and demographics for a client. The process of creating a client profile is described within our reference guide on [Client Profile](#).

**Name**  
Tommy Tune

**Inactivate Client Profile**

**Contact Type**  
Client

**Date of Birth**  
7/7/1955

**Phone**

**Home Address**  
50 LEXINGTON AVENUE, MANHATTAN, NY 10010

**Upload Picture**

**Details** **Consents** **Contacts** **General Comments** **Enrollments** **Documents** **Program History** **Profile Update History**

**Basic Demographics** **Social Demographics** **Emergency Preparedness** **Financial** **NYSOFA Additional Info**

**ID**  
2000001789

**Status**  
Active

Legal Assistance providers are not required to complete the entire Client Profile, but must enter the following client characteristics information required by the New York State Office for the Aging (NYSOFA) State Performance Report (SPR):

- Gender (will be generated on the SPR as gender distribution)
- Address (will be generated on the SPR as geographic distribution, i.e., rural or non-rural)

- Income (will be generated on the SPR as Poverty status distribution, i.e., at or below poverty or above poverty)
- Lives With (will be generated on the SPR as Household status distribution, i.e., lives alone, with others, or in Long Term Care facility)
- Ethnic heritage and Race (will be generated on the SPR as Ethnicity distribution, Race distribution, and Minority status distribution)

## Details Tab

The Details tab includes a sub-details menu of **Basic Demographics**, **Social Demographics**, **Emergency Preparedness**, **Financial** and **NYSOFA Additional Information**. Only **Basic Demographics**, **Financial**, and **Social Demographics** are described below. For additional information on the sub-sections see Details Tab within Client Profile.

### Sub-Details: Basic Demographics

Once you have either entered a new client or used the hyperlink to get into the client's profile, the destination is **Basic Demographics**. The client's core information, such as address (required by the SPR), age (required for all clients), and phone number are maintained here. These fields are editable once the user clicks the **Edit** button at the bottom. First and last name, date of birth, and address are required fields (note red asterisk). Once editing, the **Save** button will appear at the bottom of the screen. Also, note that the checkbox next to "rural" will be automatically checked if it applies based on the address entered. Click **Save** before leaving the page.

Details		Consents	Contacts	General Comments	Enrollments	Documents	Program History	Profile Update History
<b>Basic Demographics</b>		Social Demographics	Emergency Preparedness	Financial	NYSOFA Additional Info			
ID	2000001789	Status	Active					
Last Name	Tune	Suffix						
First Name	Tommy	Title						
Middle Initial/Name		Preferred Name						
Date of Birth	7/7/1955	Age	70					
Home Address	50 LEXINGTON AVENUE, MANHATTAN, NY 10010		Is Mailing Address same as Home Address?	✓				

## Sub-Details: Social Demographics

Moving from left to right, the next sub-tab is Social Demographics (the underlined and highlighted word lets you know where you are in the system). The client's information such as who they live with, race, and ethnicity (all required by the SPR) are maintained here. To edit these fields, click Edit at the bottom. Before leaving, click Save at the bottom of the page.

**NOTE:** Be sure to enter all data required by the state: age, gender, ethnicity, poverty status, household status, geographic distribution, race, and minority status.


The screenshot shows a web interface with a top navigation bar containing tabs: Details, Consents, Contacts, General Comments, Referrals, Enrollments, Unit Entry, Documents, Program History, and Profile Update History. Below this is a sub-navigation bar with tabs: Basic Demographics, Social Demographics (highlighted with a red box), Emergency Preparedness, Financial, and NYSOFA Additional Info. The main content area is titled 'Social Demographics' and contains several form fields: 'Current Marital Status' (dropdown menu showing 'Widowed'), 'Lives With' (dropdown menu showing 'Alone'), 'Frail and/or disabled' (dropdown menu showing '--None--'), and 'Number of pets owned by client' (text input field). At the bottom, there is a section titled 'Type of pets owned by client' with two columns: 'Available' (listing Cat, Dog, Fish) and 'Chosen' (listing No pets). Arrows indicate the ability to move items between these columns.

## Sub-Details: Financials

Moving from left to right, the next sub-tab is Financials (the underlined and highlighted word lets you know where you are in the system). The client's income information (required by the SPR) is maintained here. To edit these fields, click Edit. Next, answer the question of whether the client agrees to provide financial information. Once Yes is selected, the page will open to answer additional questions. Scroll down to the Income, Assets, Expenses section. Select Income and click New. Select Other from the drop-down, enter the full total income and sources of income in the notes section. Before leaving, click Save at the bottom of the page.

VIVÉ Knowledge Base – Legal Assistance

Step 1: Click **Edit**.

  
Upload Picture

Name

Ted Danson

Inactivate Client Profile

Contact Type  
Client

Date of Birth  
1/1/1930

Phone

Home Address  
[227 MADISON STREET, 4R, MANHATTAN, NY 10002](#)

Details

Consents

Contacts

General Comments

Enrollments

Documents

Program History

Profile Update History

Basic Demographics

Social Demographics

Emergency Preparedness

Financial

NYSOFA Additional Info

Date

Client agrees to provide financial info?

Edit

Step 2: Scroll down to the **Income, Assets, Expenses** section. Click **New**.

Details

Consents

Contacts

General Comments

Enrollments

Documents

Program History

Profile Update History

Basic Demographics

Social Demographics

Emergency Preparedness

Financial

NYSOFA Additional Info

Date

Nov 26, 2025

Household Size

1

--None--

✓ 1

2

3

4

5

6

7

\* Client agrees to provide financial info?

Yes

Total of Household Amount (Yearly)

\$0.00

Total of Expenses (Yearly)

\$0.00

Poverty Level

100% (Last Modified On : 11-26-2025)

Save

Incomes

Assets

Expenses

Incomes (0)

↺

New

Income ID	Monthly Income Info. complete...	Sources of income	Other source of income defined	Monthly Amount
Total of Household Amount (Monthly)				
\$0.00				
Total of Household Amount (Yearly)				
\$0.00				

The screenshot shows the 'New Income' form. At the top is a purple header with the title 'New Income'. Below the header, there is a text input field for 'Other source of income defined'. To the right of this field is a list of income sources: 'Temporary Assistance for Needy Families (TANF)', 'Veteran's Benefits', 'Public Assistance', 'Unemployment', 'Food Stamps (SNAP)', and 'Other Income (please specify below)'. The 'Other Income (please specify below)' option is highlighted with a red rectangular box. Below the list is a purple button labeled 'Save' and a white button labeled 'Cancel'.

The screenshot shows the 'New Income' form. At the top is a purple header with the title 'New Income'. Below the header, there are two main sections. The left section is titled '\* Monthly Income Info. completed for' and contains a dropdown menu with 'Client' selected. Below this is a text input field for 'Other source of income defined'. The right section is titled '\* Sources of income' and contains a dropdown menu with 'Other Income (please specify below)' selected. Below this is a text input field for '\* Monthly Amount', which is highlighted with a red rectangular box. At the bottom of the form is a purple button labeled 'Save' and a white button labeled 'Cancel'.

## Client Enrollment

A client must be enrolled in a program to enter units of service and complete any forms related to the program. The process of enrolling a client is described within our reference guide on [Enrollments](#).

NYC Department for the Aging VIVÉ

Client Search Referral Queue Program Tools Admin Tools Reports More

Logged in user is Joyce Chin and working in Legal Assistance - JASA - Queens program.

Name: Jim Client

Contact Type: Client Date of Birth: 7/5/1944 Phone: Home Address: 119 9TH AVENUE, MANHATTAN, NY 10011

Upload Picture

Inactivate Client Profile

Details Consents Contacts General Comments **Enrollments** Documents Program History Profile Update History

Enrollments (0)

New

Enrollment Name	Enrollment Status	Enrollment Date	Program
-----------------	-------------------	-----------------	---------

**Step 1:** After creating a client, you can navigate to the client profile to enroll them in your program. To do this select **Enrollment** on the blue tab and then click “New.”

NYC Department for the Aging VIVÉ

Client Search Referral Queue Program Tools Admin Tools Reports More

Logged in user is Joyce Chin and working in Legal Assistance - JASA - Queens program.

Name: Jim Client

Contact Type: Client Date of Birth: 7/5/1944 Phone: Home Address: 119 9TH AVENUE, MANHATTAN, NY 10011

Upload Picture

Inactivate Client Profile

Details Consents Contacts General Comments

Enrollments (0)

Enrollment Name

Program

Create Enrollment

\*Program: Legal Assistance - JASA - Queens

\*Contact: Jim Client

\*Enrollment Date: Oct 9, 2025

Cancel Save

**Step 2:** After clicking **New**, this pop up will appear. Enter the date the client was enrolled, and then click **Save**.

The enrollment page for the newly enrolled client will now be displayed. An overview of the enrollment will be available in the **Enrollment Details** section when selected.



The screenshot displays the 'Enrollment Details' page for 'Legal Assistance - JASA - Queens'. At the top, there is a header with the program name and a 'Contact' section listing 'Bon Jovi' as the assigned contact. Below this is a navigation bar with tabs: 'Enrollment Details' (selected), 'Forms', 'Unit Entry', 'Follow up', 'Contacts', 'Documents', and 'Status History'. The main content area is divided into two sections: 'Enrollment Information' and 'Referral Information'. The 'Enrollment Information' section contains fields for 'Enrollment Name' (Legal Assistance - JASA - Queens), 'Enrollment Status' (Active), 'Enrollment Date' (10/9/2025), and 'Program' (Legal Assistance - JASA - Queens). The 'Referral Information' section contains fields for 'Linked Referral' and 'Referring Agency Name'. Each field has a small edit icon (pencil) next to it.

Enrollment Information	
Enrollment Name	Enrollment Status
Legal Assistance - JASA - Queens	Active
Enrollment Date	Program
10/9/2025	Legal Assistance - JASA - Queens

Referral Information	
Linked Referral	Referring Agency Name

## Entering Client Units

There are three status types for Client Units:

- **Draft:** A unit in draft status can be edited. NOTE: Any unit in draft status will be automatically finalized when a **Monthly Unit Summary** is generated (see more below).
- **Final:** A unit that has been finalized can no longer be edited and will be captured within the **Monthly Unit Summary** (see more below).
- **Void:** A unit in draft status can be marked as void, and it will not be included in any finalized reports.

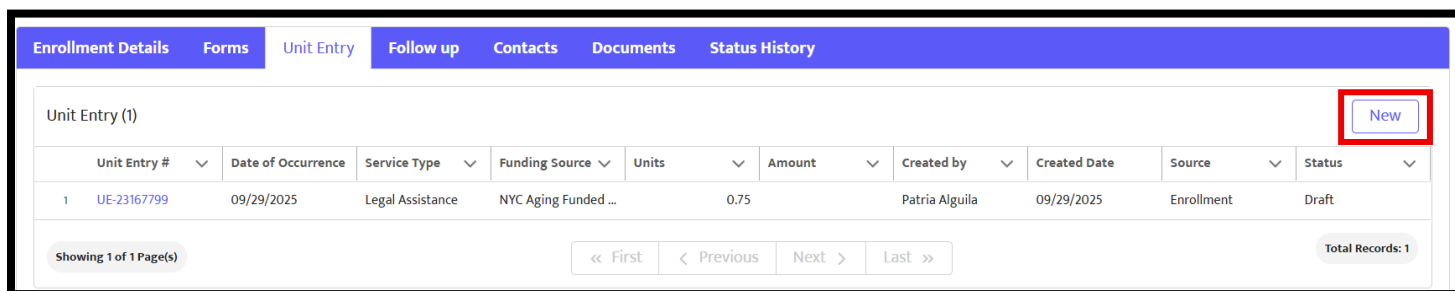
Use the **Enrollment Details Menu** to enter units specific to a client.

**Step 1:** From the **Top Menu**, click **Client Search**, and click desired client's name.

**Step 2:** From the **Details Menu**, click **Enrollments**.

**Step 3:** From the **Enrollment Details Menu**, click the **Unit Entry** tab. (Depending upon your window's width, you may have to select **More** to access **Unit Entry** from that dropdown menu.)

**Step 4:** Click **New**.

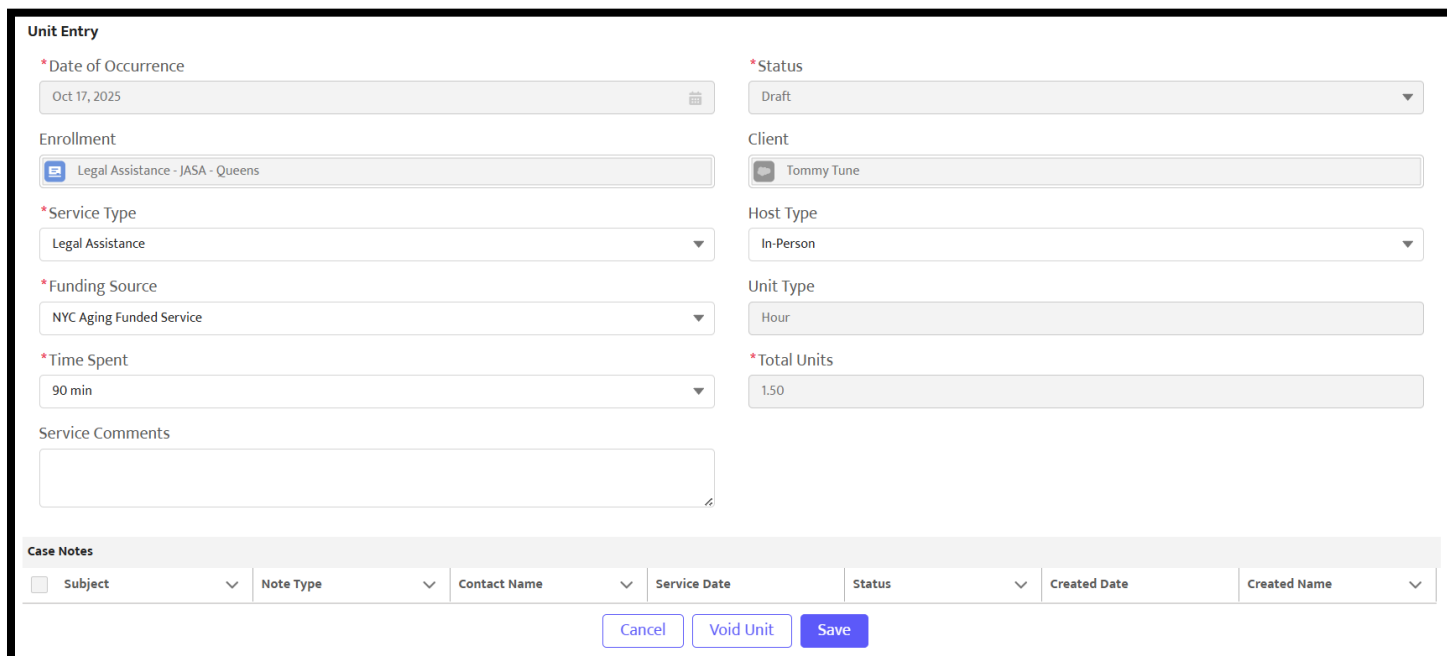


Unit Entry #	Date of Occurrence	Service Type	Funding Source	Units	Amount	Created by	Created Date	Source	Status
1	UE-23167799	09/29/2025	Legal Assistance	NYC Aging Funded ...	0.75	Patria Alguila	09/29/2025	Enrollment	Draft

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

**Step 5:** Enter the details, which must include the required fields marked by an asterisk.

**Step 6:** Click **Save**.



**Unit Entry**

\*Date of Occurrence: Oct 17, 2025

\*Status: Draft

Enrollment: Legal Assistance - JASA - Queens

Client: Tommy Tune

\*Service Type: Legal Assistance

Host Type: In-Person

\*Funding Source: NYC Aging Funded Service

Unit Type: Hour

\*Time Spent: 90 min

\*Total Units: 1.50

Service Comments:

Case Notes:

Subject	Note Type	Contact Name	Service Date	Status	Created Date	Created Name
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Buttons: Cancel, Void Unit, Save

**TIP:** Service comments are optional; however, they can provide helpful details when reconciling units.

## Editing Client Units

Use the **Enrollment Details Menu** to edit units for a client. You can only edit units that are in **Draft** status. When units are finalized on the **Monthly Unit Summary**, all unit entry fields will be locked and can no longer be edited. To unlock a unit or the **Monthly Unit Summary** after it has been finalized, please contact your Program Officer.

**Step 1:** From the **Top Menu**, click **Client Search**, and click desired client's name.

**Step 2:** From the **Details Menu**, click **Enrollments**.

**Step 3:** From the **Enrollment Details Menu**, click the **Unit Entry** tab. (Depending upon your window's width, you may have to select **More** to access **Unit Entry** from that dropdown menu. )

**Step 4:** Click the link under the heading **Unit Entry** to view the details.

Enrollment Details Forms Unit Entry Follow up Contacts Documents Status History										
Unit Entry (2)										New
Unit Entry #	Date of Occurrence	Service Type	Funding Source	Units	Amount	Created by	Created Date	Source	Status	
1	UE-23168415	10/17/2025	Legal Assistance	NYC Aging Funded ...	1.5	Patria Alguila	10/17/2025	Enrollment	Draft	
2	UE-23167799	09/29/2025	Legal Assistance	NYC Aging Funded ...	0.75	Patria Alguila	09/29/2025	Enrollment	Draft	
Showing 1 of 1 Page(s) << First < Previous Next > Last >> Total Records: 2										

## Voiding Client Units

Providers may wish to void a unit that was entered incorrectly or inaccurately. Only units that are in draft status can be voided; providers cannot void finalized units (units are finalized by either marking the unit as finalized, or by running the Monthly Unit Summary). For assistance with voiding units after finalization, please contact your Program Officer.

**Step 1:** Go to the **Unit Entry** details page.

**Step 2:** Click **Void Unit** at the bottom of the page.

**NOTE:** Once a unit has been voided, it cannot be edited. A void cannot be undone, and a new unit must be created instead.

## Entering Case Type and Service Levels (Legal Assistance Form)

Legal Assistance providers are required to report the levels of service provided to each client, which will be aggregated and reported to NYSOFA as part of the State Performance Report (SPR). This data will be entered under the **Form** sub-category under **Enrollments** ("Legal Assistance Form").

NYC Department for the Aging | VIVÉ | Client Search | Referral Queue | Program Tools | Admin Tools | Reports | More | Joyce Chin

Logged in user is **Joyce Chin** and working in **Legal Assistance - JASA - Queens** program.

**Name:** Tommy Tune [Inactivate Client Profile](#)

**Contact Type:** Client **Date of Birth:** 7/7/1955 **Phone:** **Home Address:** 50 LEXINGTON AVENUE, MANHATTAN, NY 10010

[Upload Picture](#)

**Details | Consents | Contacts | General Comments | Enrollments | Documents | Program History | Profile Update History**

**Enrollments (1)** [New](#)

Enrollment Name	Enrollment Status	Enrollment Date	Program
1 Legal Assistance - JASA - Queens	Active	09/27/2025	Legal Assistance - JASA - Queens

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

**Step 1:** To access the **Legal Assistance Form** you will need to select the name of your organization under the **Enrollments** tab, which in this screenshot highlighted in the red box.

NYC Department for the Aging | VIVÉ | Client Search | Referral Queue | Program Tools | Admin Tools | Reports | More | Joyce Chin

Logged in user is **Joyce Chin** and working in **Legal Assistance - JASA - Queens** program.

**Enrollment:** Legal Assistance - JASA - Queens [Assign Worker](#) [On Hold](#) [Closing Enrollment](#)

**Contact:** Tommy Tune **Assigned To:**

**Enrollment Details | Forms | Unit Entry | Follow up | Contacts | Documents | Status History**

**Legal Services**

**Legal Services (0)** [New](#)

Sr. No.	Case Type	Own/Shared Form
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**Step 2:** In the new tab, select the **Forms** sub-section. From there, click **New** to retrieve the form.

The screenshot shows the 'Legal Services' form. At the top right are buttons for 'Save', 'Save & Exit', and 'Cancel'. Below the form title is a section labeled 'Legal Services'. A red box highlights the '\*Select Case Type' dropdown menu, which is currently open. The dropdown list includes the following options: 'Consumer/Finance', 'Employment', 'Family', 'Juvenile', 'Health', 'Housing', 'Income Maintenance', and 'Individual Rights (Immigration, Disability, Other)'. To the right of the dropdown, there are 'Exit' and 'Cancel' buttons. A blue header bar at the bottom of the form area contains the text 'G - VIVE'.

**Step 3:** Select the **Case Type** from the drop-down menu.

This screenshot shows the 'Legal Services' form with 'Consumer/Finance' selected in the '\*Select Case Type' dropdown. Below this, under the heading '\*Consumer/Finance', there is a list of 14 checkboxes for specific services and outcomes. The checkboxes are arranged in three columns. The first column contains items 01 through 05, the second column contains items 06 through 09, and the third column contains items 11 through 14. Item 10, 'Obtained other benefit on a Consumer matter', is checked with a blue checkmark. At the top right of the form are the 'Save', 'Save & Exit', and 'Cancel' buttons.

**Step 4:** Each **Case Type** category will populate applicable check boxes. Check any and all boxes that reflect the level of service that was provided and outcome of the matter.

The screenshot shows the 'Legal Services' form with a red box highlighting the '\*Case Status' dropdown menu. The dropdown is open, showing three options: 'Open', 'Closed', and 'Rejected'. The 'Open' option is currently selected. To the right of the dropdown, there is an 'Exit' button. The background of the form shows the 'Legal Services' title and the 'Save', 'Save & Exit', and 'Cancel' buttons at the top right.

**Step 5:** Select **Case Status**.

**\* Case Status**

Open

**\* Date Case Opened**

11/3/2025

**Level of Service**

Select an Option

- Advice
- Limited Representation
- Representation
- N/A

**Step 6:** Enter the date for when the case was opened and closed (if the case status is closed). Then select **Level of Service** to indicate the level of service provided from the drop down menu.

**Legal Services**

**Legal Services**

**\* Select Case Type**

Consumer/Finance

**\* Consumer/Finance**

☐ 01. Obtained federal bankruptcy protection  
☐ 02. Stopped or reduced debt collection activity  
☐ 03. Avoided, ended or reduced garnishment or levy  
☐ 04. Resolved credit reporting errors  
☒ 05. Avoided or delayed utility termination, or secured utility services  
☐ 06. Obtained waiver or reduction of utility arrearage (including phone)  
☐ 07. Obtained advice & counsel on a Consumer matter  
☐ 08. Obtained non-litigation advocacy services on a Consumer matter  
☐ 09. Obtained referral on a Consumer matter  
☒ 10. Obtained other benefit on a Consumer matter  
☐ 11. Overcame Predatory Lending Practice  
☐ 12. Obtained insurance benefits (other than health or disability)  
☐ 13. Obtained protection from financial abuse (by non-family members)  
☐ 14. Submitted complaint to regulatory agency

**\* Case Status**

Open

**\* Date Case Opened**

11/3/2025

**Level of Service**

Advice

Save Save & Exit Cancel

**Step 7:** Click **Save** or **Save & Exit** to record the entry or cancel to exit the form without saving.

**NOTE:** Please prioritize completing this form and place less emphasis on the service-provided code for closing enrollment.

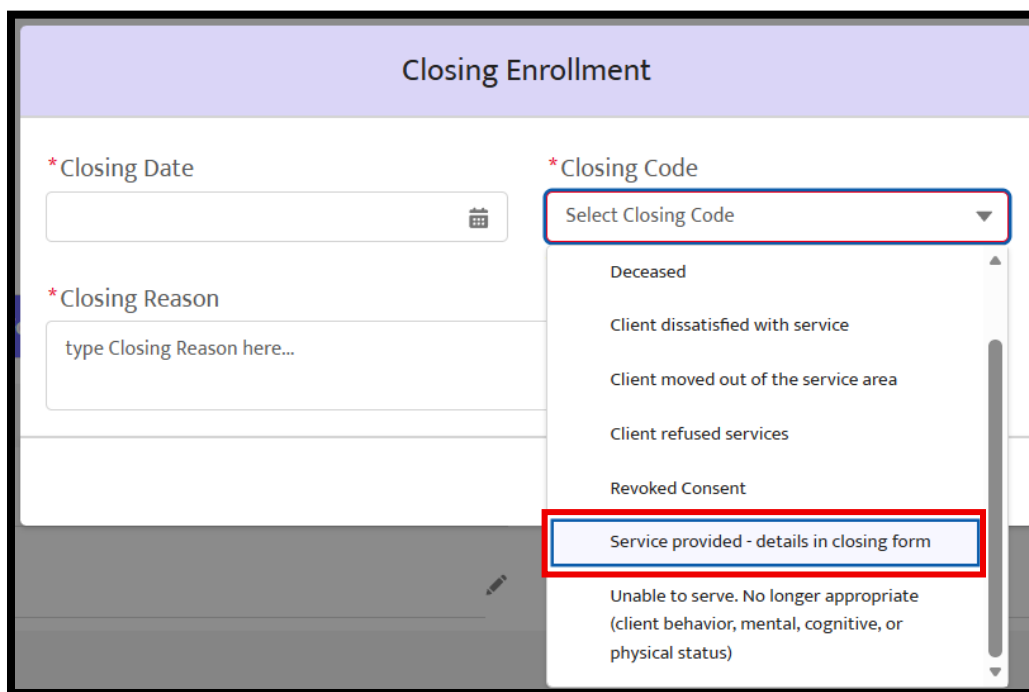
## Closing Enrollment

If a client is no longer receiving services from your program, you would close their enrollment by clicking **Closing Enrollment**.



The screenshot shows the top section of the VIVÉ system interface. On the left, there is a header for 'Enrollment' with a sub-header 'Legal Assistance - BLS - BK, MN, & SI'. Below this, it says 'Contact: Alisia ARLegal' and 'Assigned To:'. On the right side, there are three buttons: 'Assign Worker', 'On Hold', and 'Closing Enrollment'. The 'Closing Enrollment' button is highlighted with a red rectangular box.

Next, enter the **Closing Date**, select a **Closing Code** from the drop-down menu, and type in the **Closing Reason** for the enrollment.

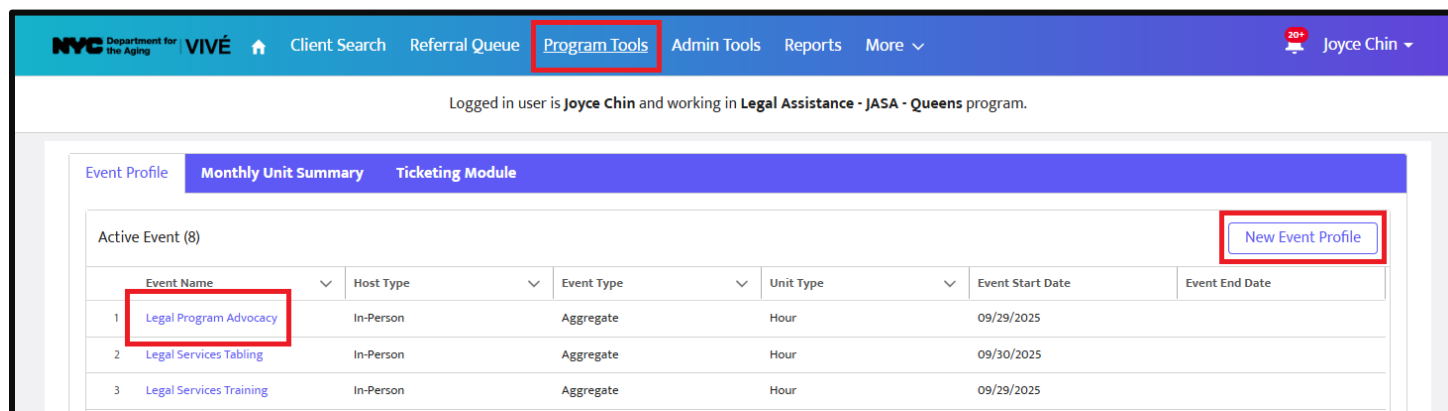


The screenshot shows the 'Closing Enrollment' form. It has a purple header with the title 'Closing Enrollment'. Below the header, there are three main sections: '\* Closing Date' with a date picker, '\* Closing Reason' with a text input field, and '\* Closing Code' with a dropdown menu. The dropdown menu is open, showing a list of closing codes. The code 'Service provided - details in closing form' is highlighted with a red rectangular box. Other codes in the list include 'Deceased', 'Client dissatisfied with service', 'Client moved out of the service area', 'Client refused services', 'Revoked Consent', and 'Unable to serve. No longer appropriate (client behavior, mental, cognitive, or physical status)'.

**NOTE:** The most common reason for closing enrollment is "Service provided."

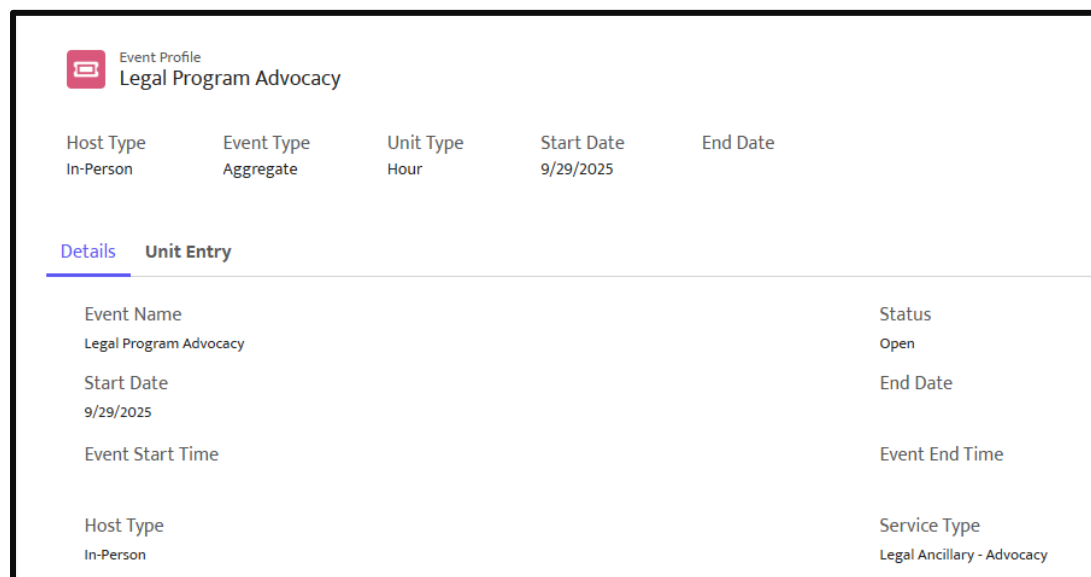
## Event Unit Entry

VIVÉ allows you to create and manage both one-time and recurring events and activities. It supports entering units. For more information, refer to the [Events guide](#) in the VIVÉ Knowledge Base.



**Step 1:** Click on **Program Tools** to then click on **Event Profile** tab to access events.

**Step 2:** Clicking on an **Event Name** link under the **Active Event** menu will allow you to view the event details and add units to the event. Clicking on **New Event Profile** will allow you to create a new event, which may be one-time or ongoing.



**Step 3:** Click on the **Unit Entry** tab to enter information under **Total Units**, **Total Clients**, and **Funding Source**.



Unit Entry

Event Details

Event Profile

Anonymous Test

Event Location

105 COURT STREET, BROOKLYN, NY 11201

Fee Amount

Event Type

Aggregate

Unit Type

Hour

Event Manager

Unit Entry Details

\*Date of Occurrence

Nov 19, 2025

\*Status

Draft

\*Total Units

\*Total Clients

Total \$

\*Funding Source

--None--

Cancel

Save

## Entering Anonymous Units

To record bulk anonymous units for Public Information activities and to record service units for information and assistance provided at clinics and tabling events, use Event Profile or create a new event. Follow previous steps from **Event Unit Entry** outlined above.

To record service units provided to an individual who must remain anonymous, follow the Unit Entry guidance and use the following 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.

## Monthly Unit Summary

The **Monthly Unit Summary** reports the summary of units recorded in a month and must be included with the monthly invoice. The report should not be finalized until all client service and event units have been confirmed. ***Once a report is finalized, units can no longer be entered or edited. If you need to unlock a Monthly Unit Summary in order to edit or add a unit(s), contact your program officer.***

**Step 1:** From the **Top Menu**, click on **Program Tools**. Then click on **Monthly Unit Summary**.

NYC Department for the Aging | VIVÉ | Client Search | Referral Queue | **Program Tools** | Admin Tools | Reports | More ▾

Logged in user is **Patria Alguila** and working in **Legal Assistance - JASA - Queens** program.

Event Profile | Monthly Unit Summary | Ticketing Module

Monthly Unit Summary (1)

Name	Month	Year	Created Date	Status
MUS-000038	September	2025	09/29/2025	Draft

New

**Step 2:** Click on either a draft **Name** link or the **New** button.

**Step 3:** If you select the **New** button, you must select the month and year. Then calculate the units for that period.

Monthly Unit Summary

\*Program  
☐ Legal Assistance - JASA - Queens

\*Status  
 Draft

\*Month  
 October

\*Year  
 2025

Total Cost Center Amount

Calculate Units

**TIP:** To print the Monthly Summary Unit, use the print option from the browser or print screen option.

If you select an existing Monthly Unit Summary, you will be able to see the units collected for the month selected. If there are additional units that have been added since the report was generated, click the **Recalculate** button to include all entries in that month's totals.

**NOTE:** Once a report is finalized, there can be no more additions, deletions or other changes. If you need to make any changes, contact your program officer.

## Reports

Reports are still being finalized within VIVÉ. The first set available are the common reports used across all programs. Additional programmatic reports will be announced as they become available. For more information, refer to the [Reports guide](#) in the VIVÉ Knowledge Base.

## **Access Assistance with VIVÉ and the VIVÉ Knowledge Base**

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[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.