Return to VIVÉ Knowledge Base

The VIVÉ Legal Assistance for Older New Yorkers Reference Guide

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:

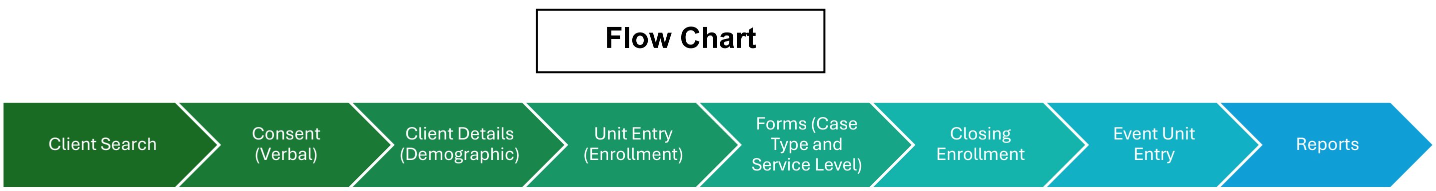
- Legal Assistance Flow
- Consent
- Client Profile
- Details Tab
    - Sub-Details: Basic Demographics
    - Sub-Details: Social Demographics
    - Sub-Details: Financials
- Client Enrollment
    - Entering Client Units
    - Editing Client Units
    - Voiding Client Units
    - Entering Case Type and 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

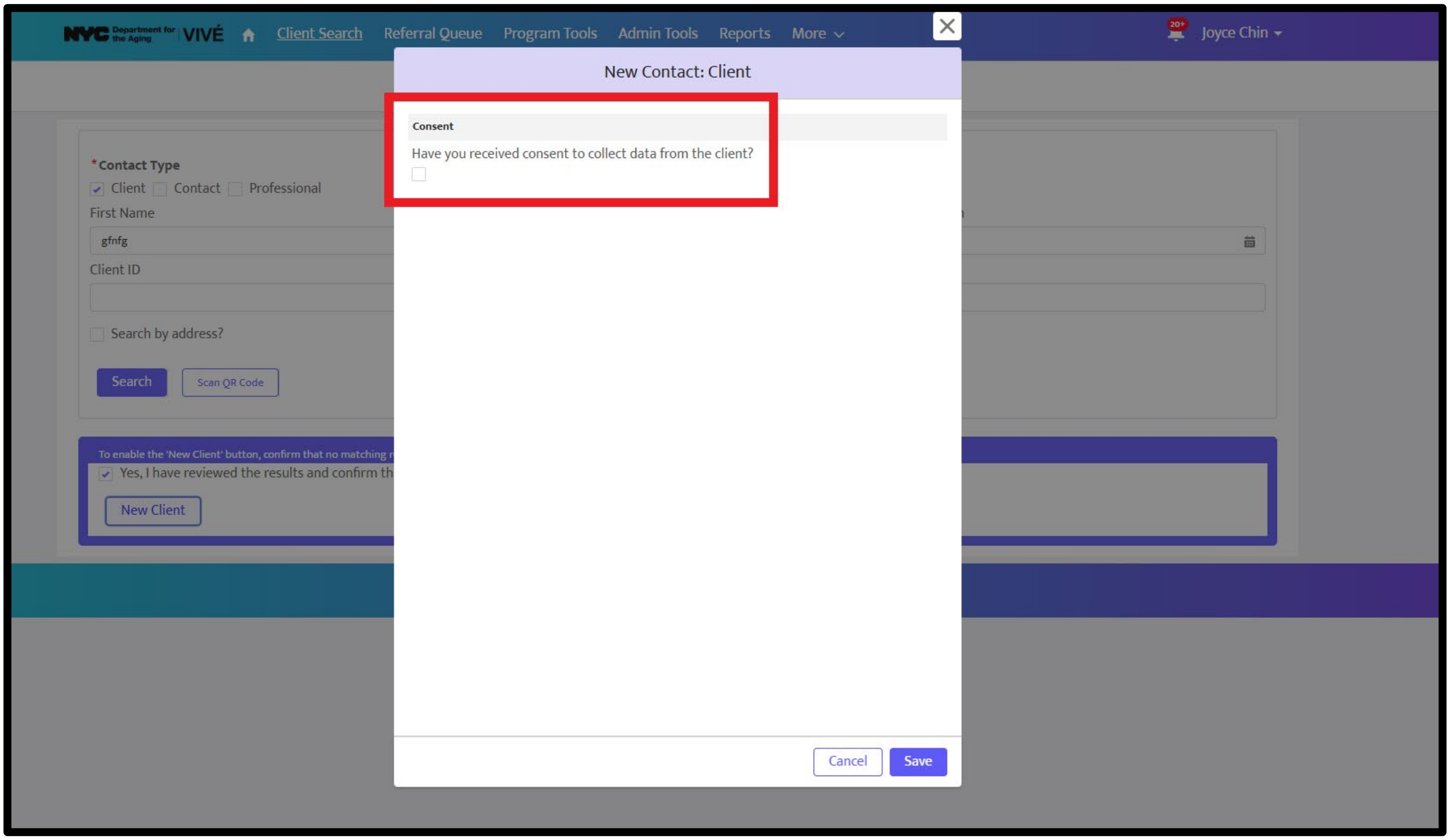
Legal Assistance Flow

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.



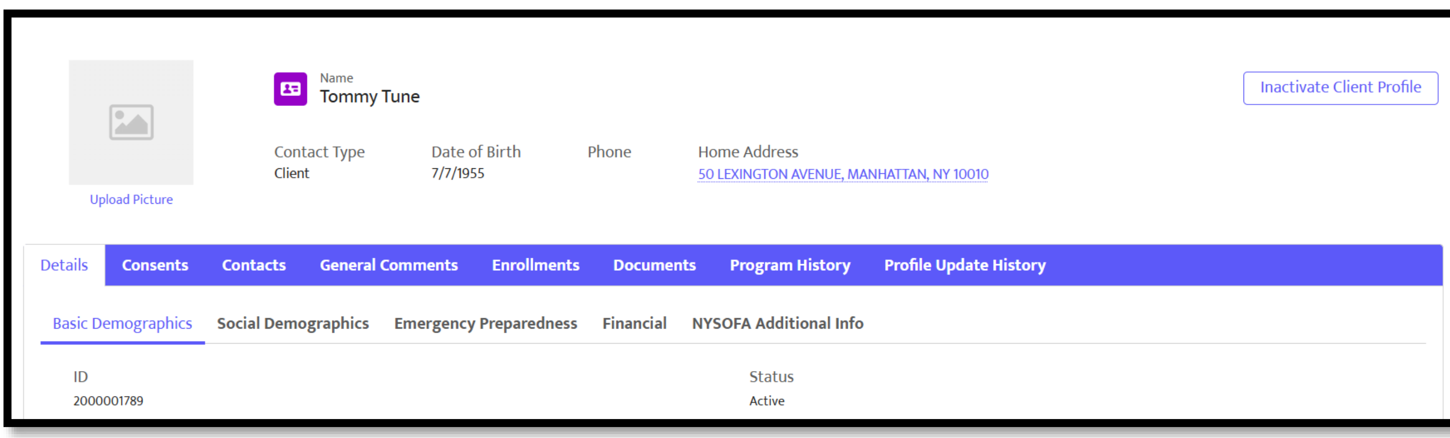
Consent

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.



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](#).



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)

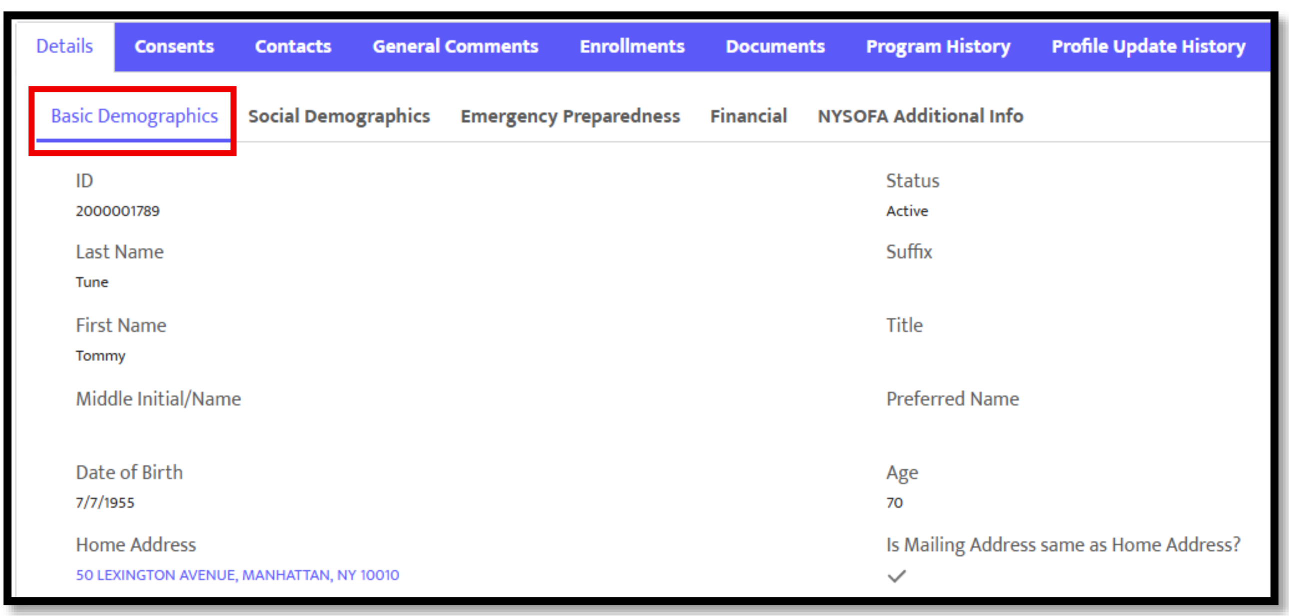
- Income (will be generated on the SPR as Poverty status distribution, i.e., at or below poverty or above poverty)
- Lives With (will be generated on the SPR as Household status distribution, i.e., lives alone, with others, or in Long Term Care facility)
- Ethnic heritage and Race (will be generated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

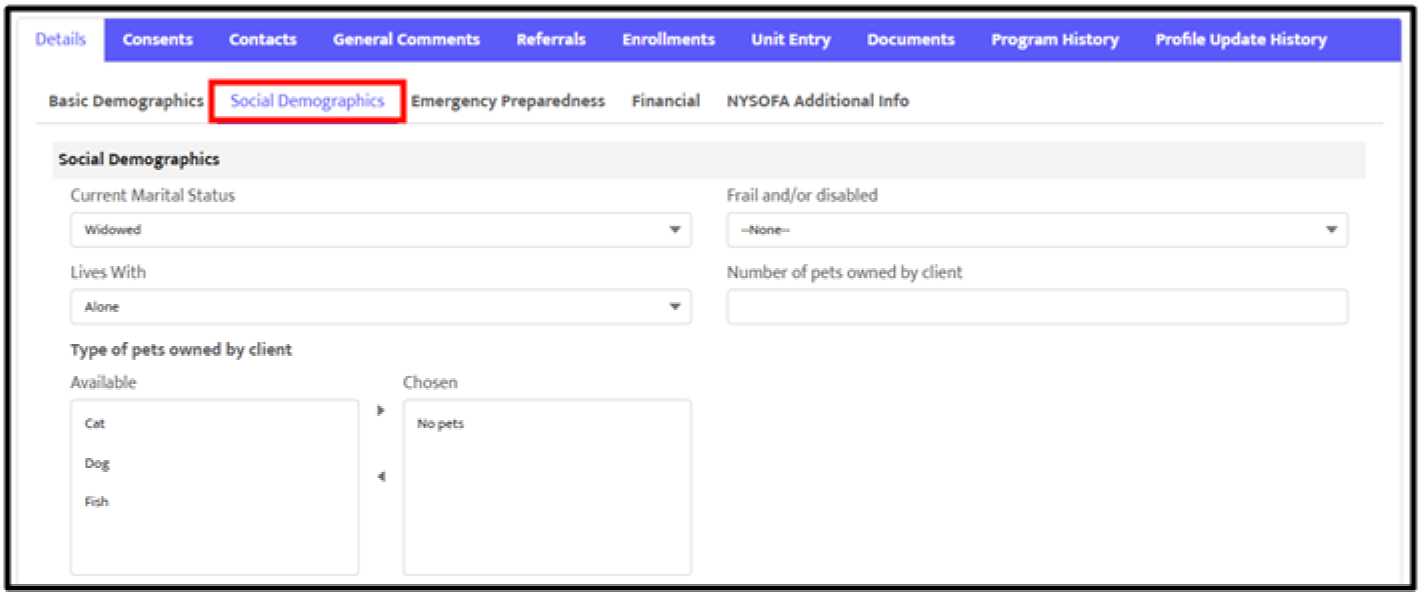
Once you have either entered a new client or used the hyperlink to get into the client's profile, the destination is **Basic Demographics**. The client's core information, such as address (required by the SPR), age (required for all clients), and phone number are maintained here. These fields are editable 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.



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.

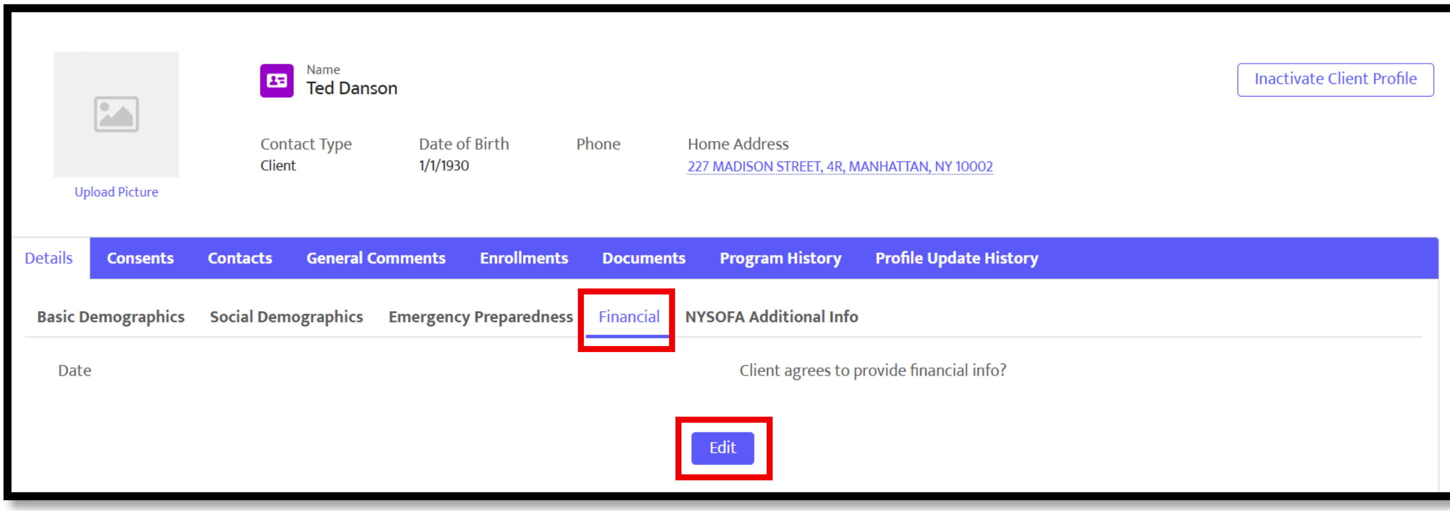
NOTE: *Be sure to enter all data required by the state: age, gender, ethnicity, poverty status, household status, geographic distribution, race, and minority status.*



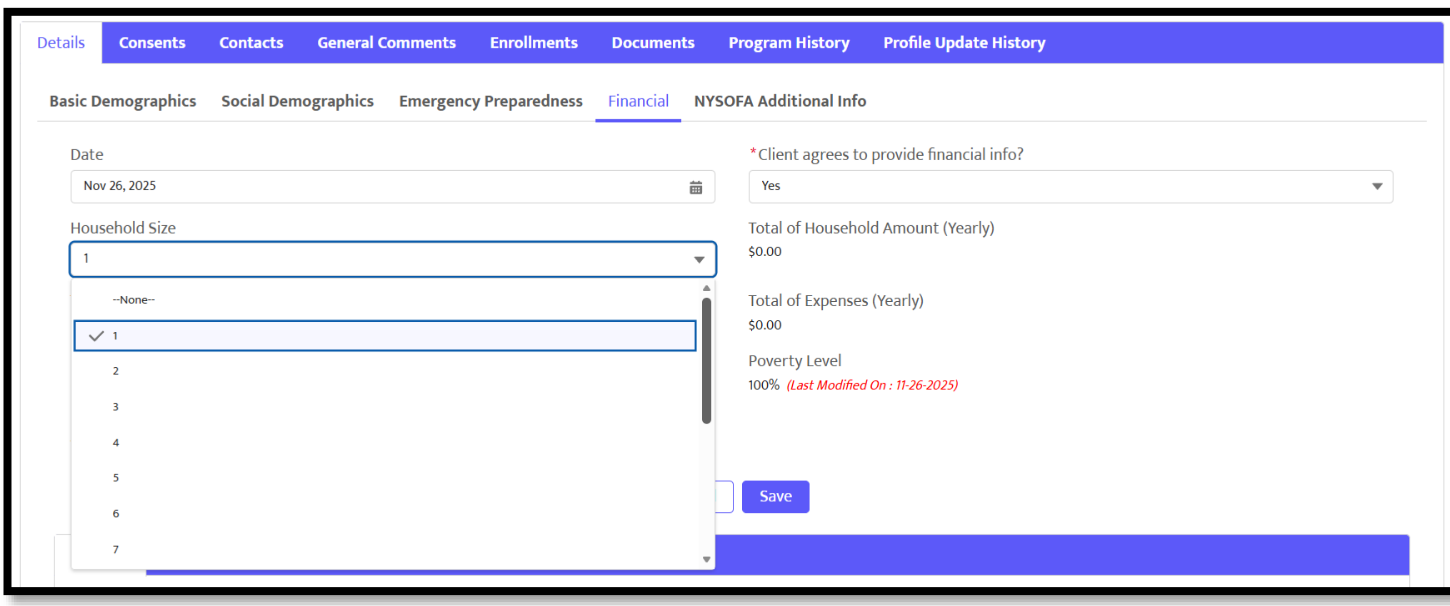
Sub-Details: Financials

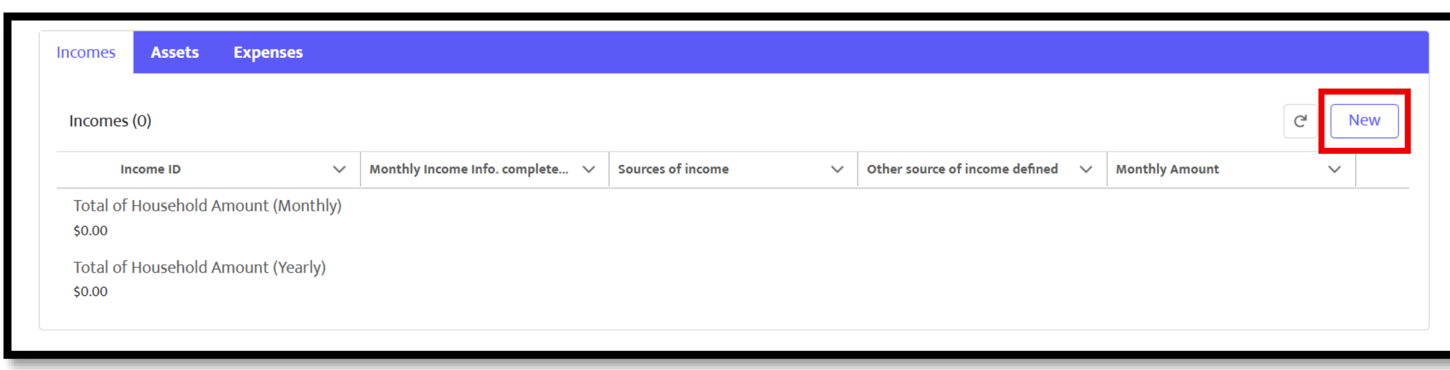
Moving from left to right, the next sub-tab is Financials (the underlined and highlighted word lets you know where you are in the system). The client's income information (required by the SPR) is maintained here. To edit these fields, click Edit. Next, answer the question of whether the client agrees 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.

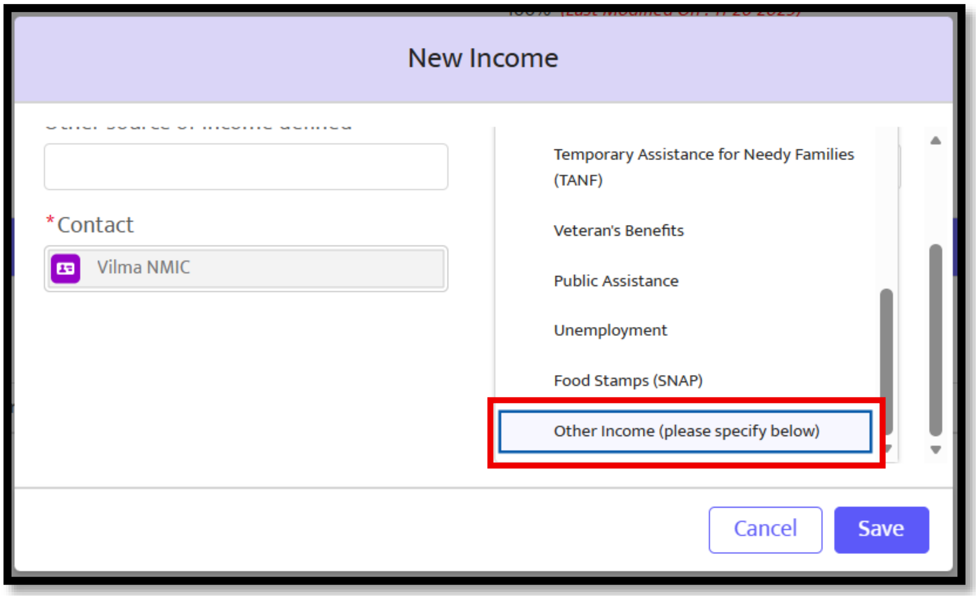
Step 1: Click **Edit**.

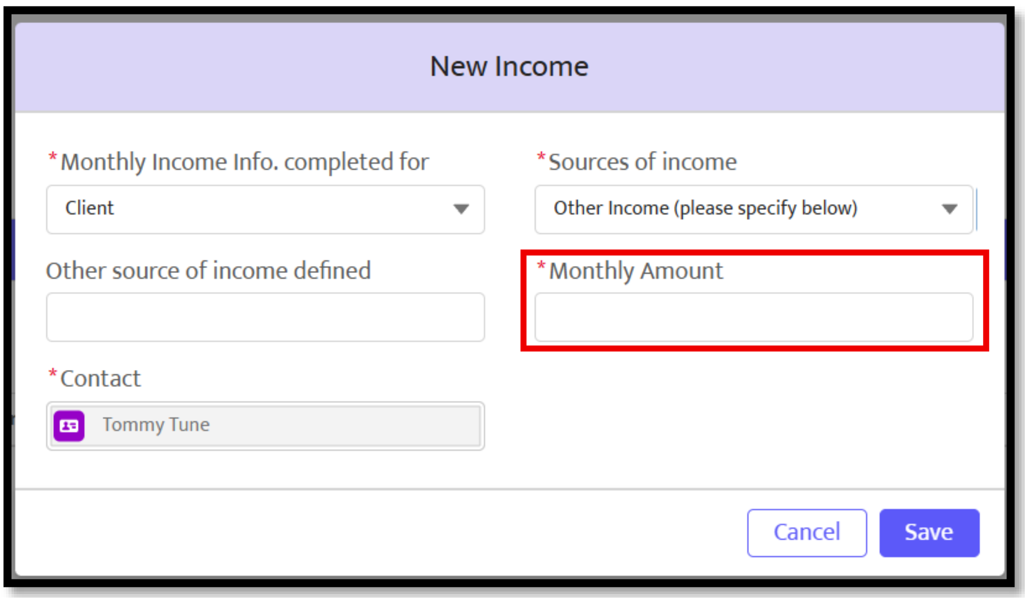


Step 2: Scroll down to the **Income, Assets, Expenses** section. Click **New**.



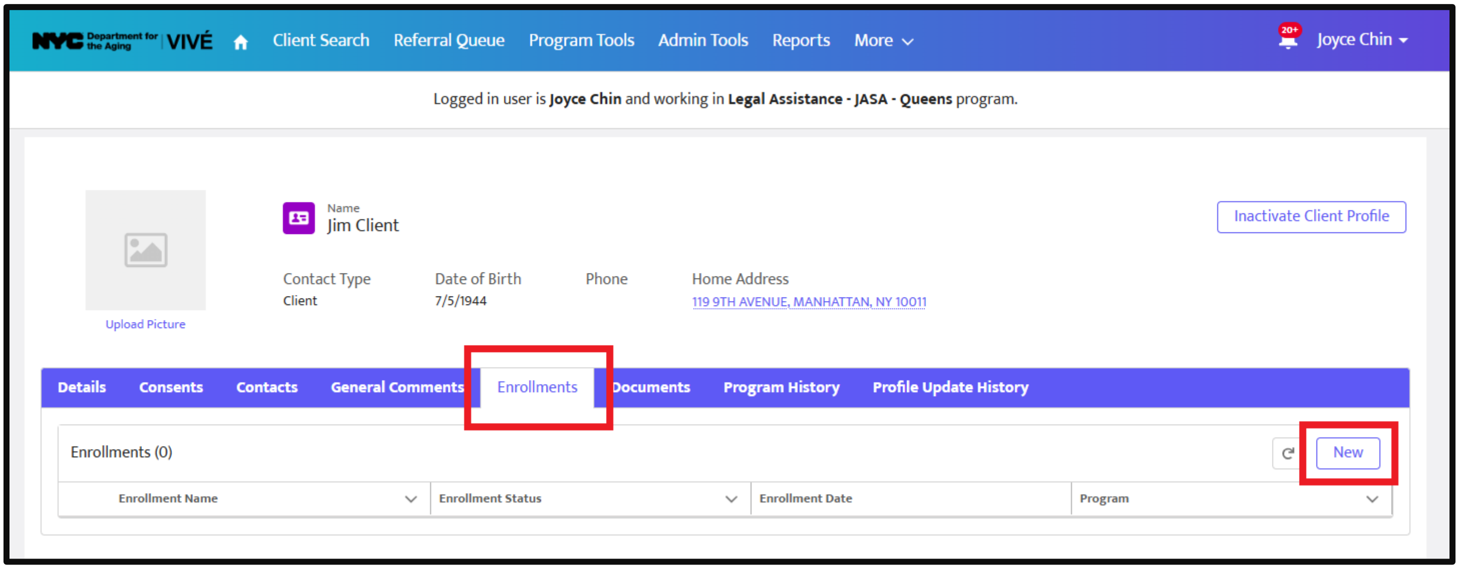




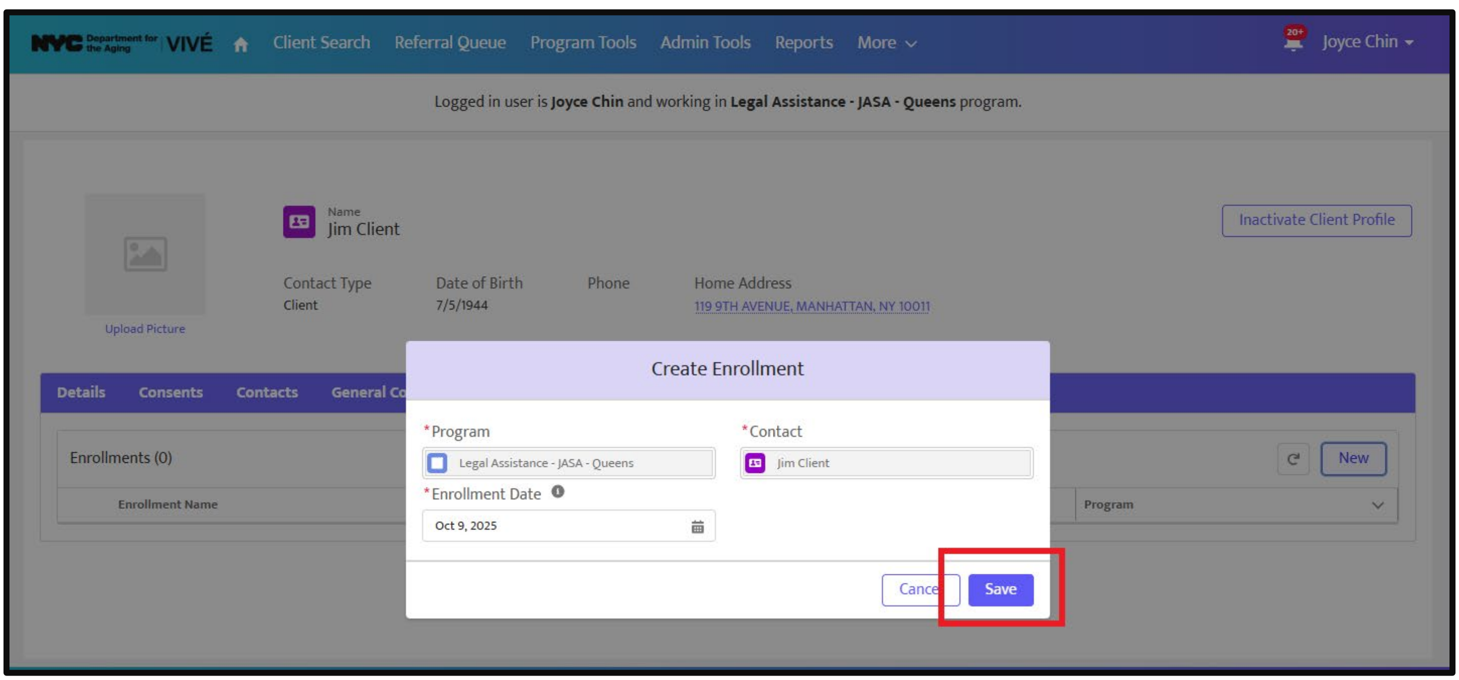


Client Enrollment

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.

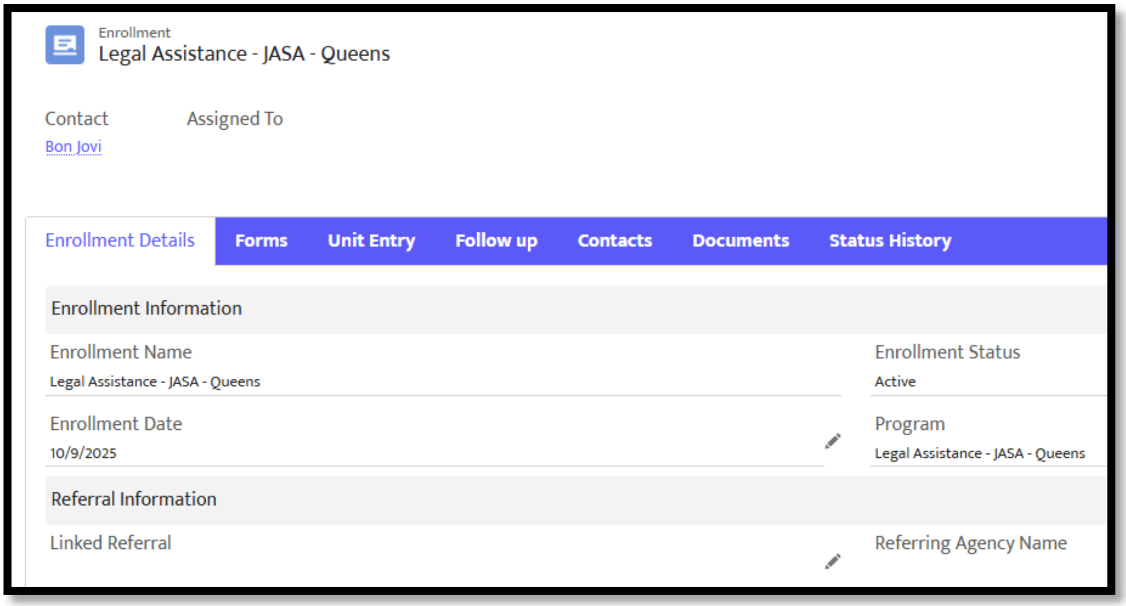


Step 1: After creating a client, you can navigate to the client profile to enroll them in your program. To do this select **Enrollment** on the blue tab and then click "New."



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.



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.

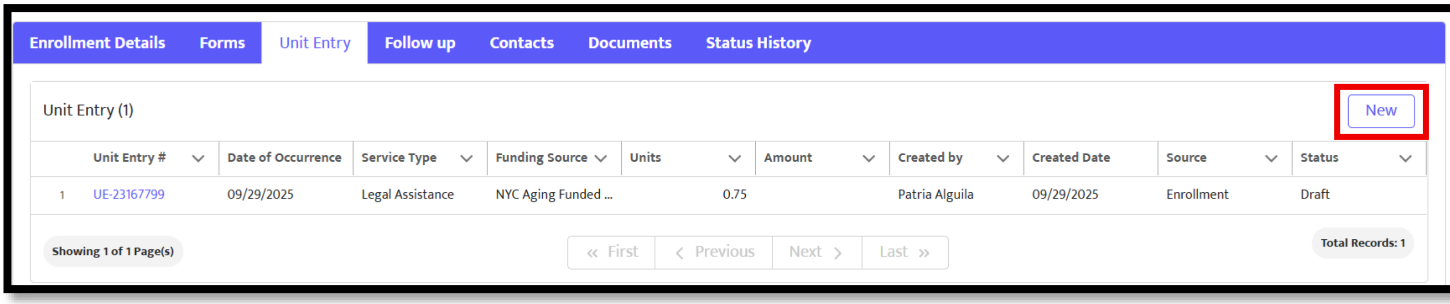
Use the **Enrollment Details Menu** to enter units specific to a client.

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

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

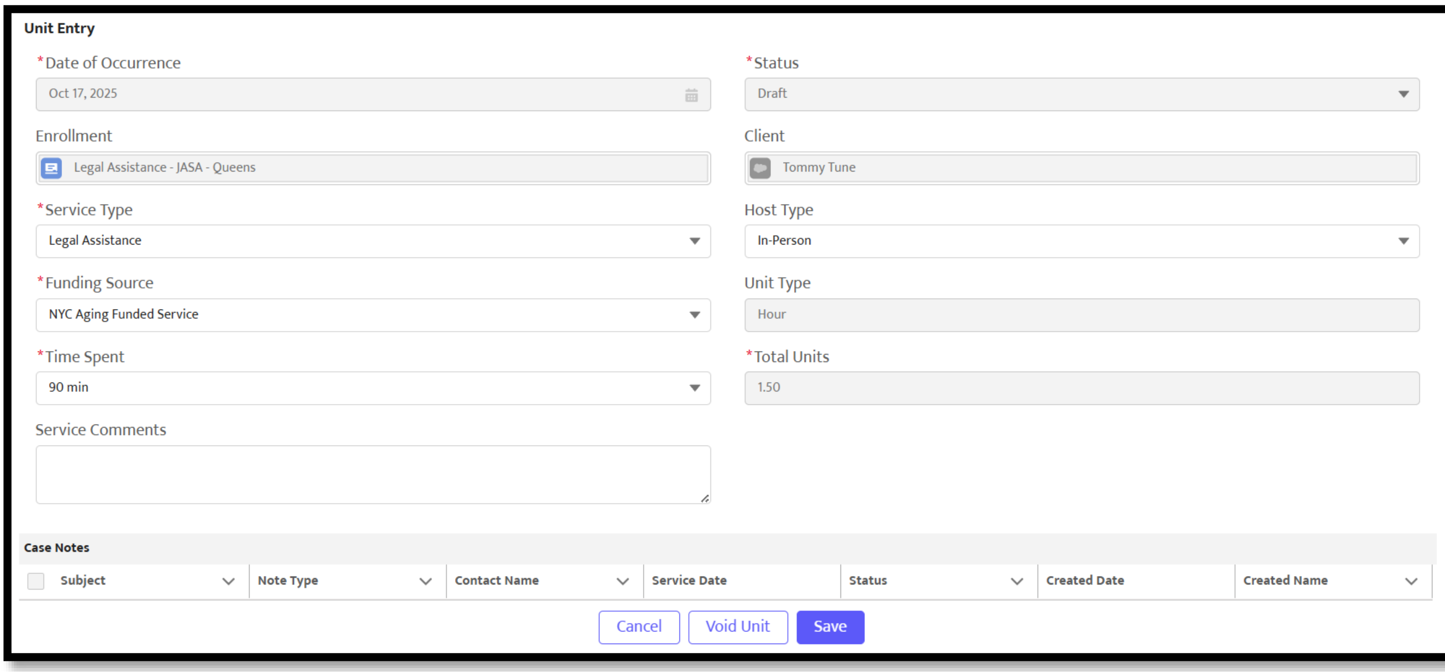
Step 3: From the **Enrollment Details Menu**, click the **Unit Entry** tab. (Depending upon your window's width, you may have to select **More** to access **Unit Entry** from that dropdown menu.)

Step 4: Click **New**.



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

Step 6: Click **Save**.



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

Editing Client Units

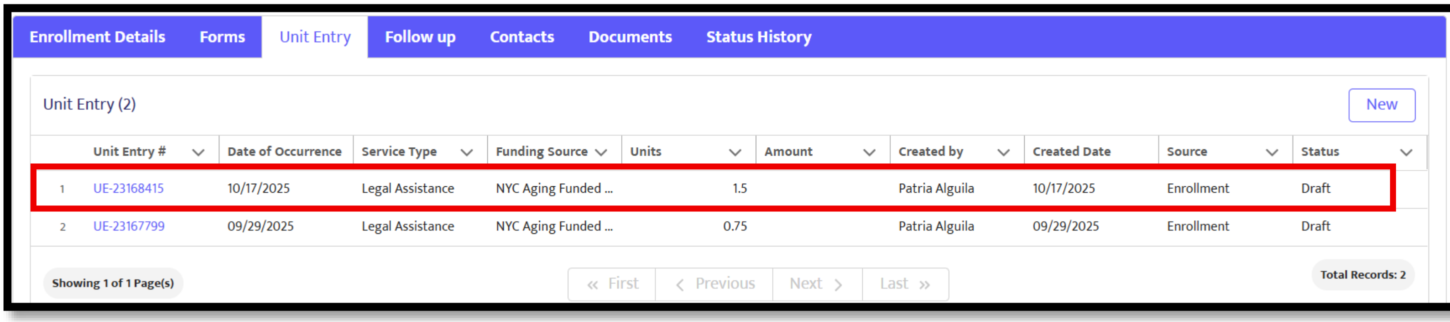
Use the **Enrollment Details Menu** to edit units for a client. You can only edit units that are in **Draft** status. When units are finalized on the **Monthly Unit Summary**, all unit entry fields will be locked and can no longer be edited. To unlock a unit or the **Monthly Unit Summary** after it has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



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.

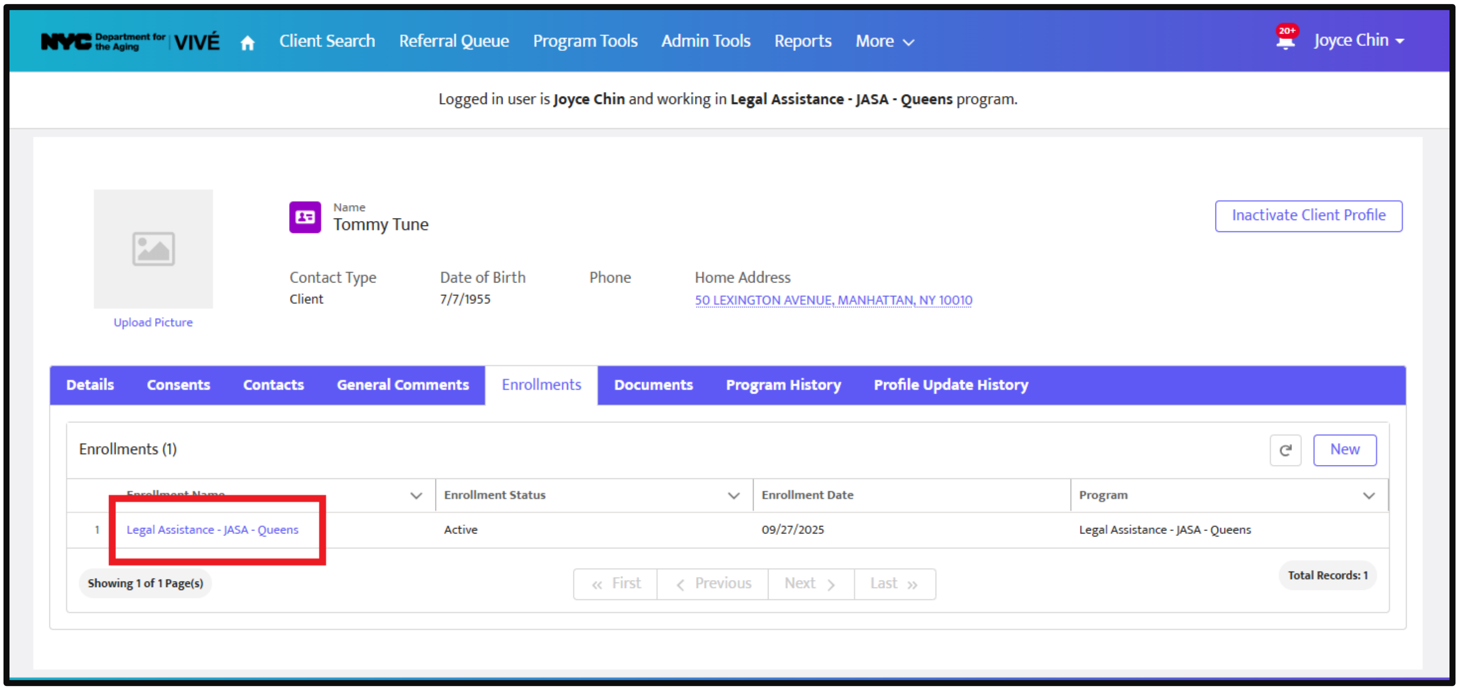
Step 1: Go to the **Unit Entry** details page.

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

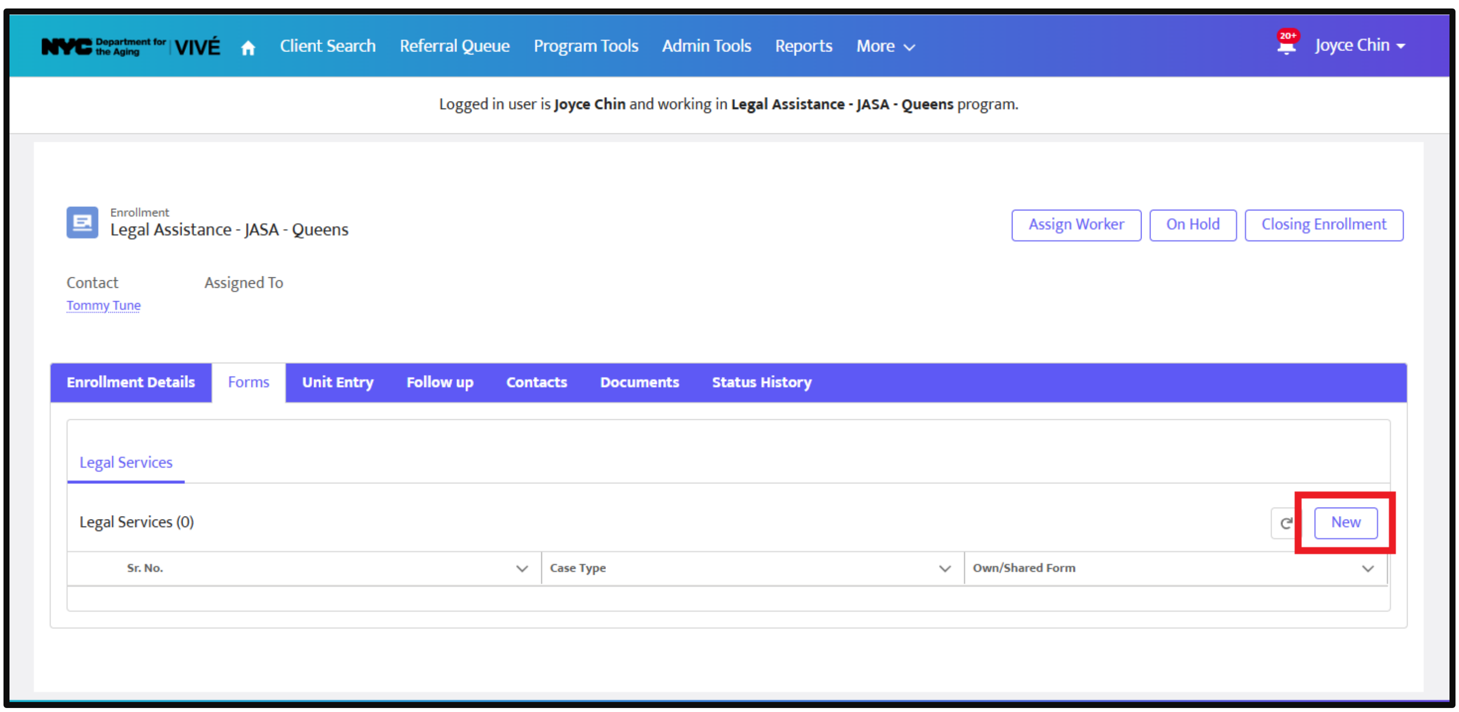
NOTE: *Once a unit has been voided, it cannot be edited. A void cannot be undone, and a new unit must be created instead.*

Entering Case Type and Service Levels (Legal Assistance Form)

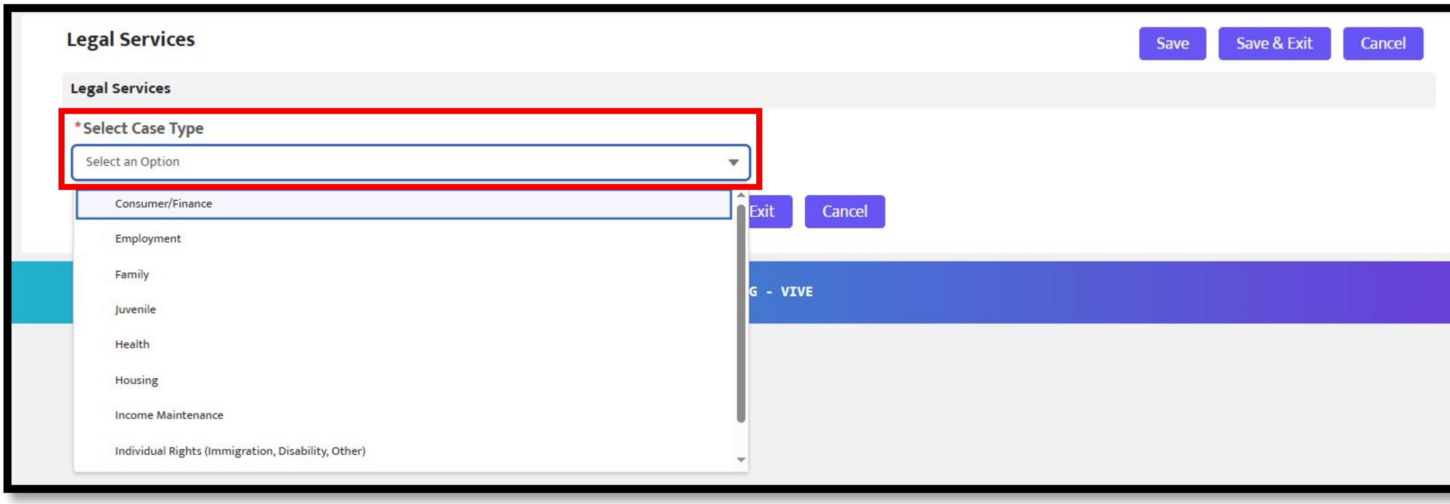
Legal Assistance providers are required to report the levels of service provided to each client, which will be aggregated and reported to NYSOFA as part of the State Performance Report (SPR). This data will be entered under the **Form** sub-category under **Enrollments** ("Legal Assistance Form").



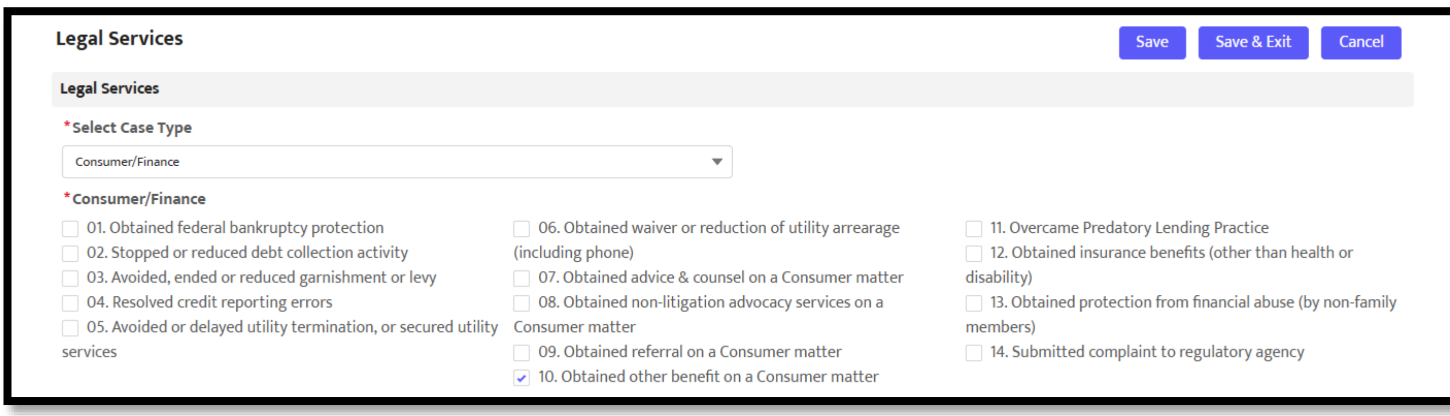
Step 1: To access the **Legal Assistance Form** you will need to select the name of your organization under the **Enrollments** tab, which in this screenshot highlighted in the red box.



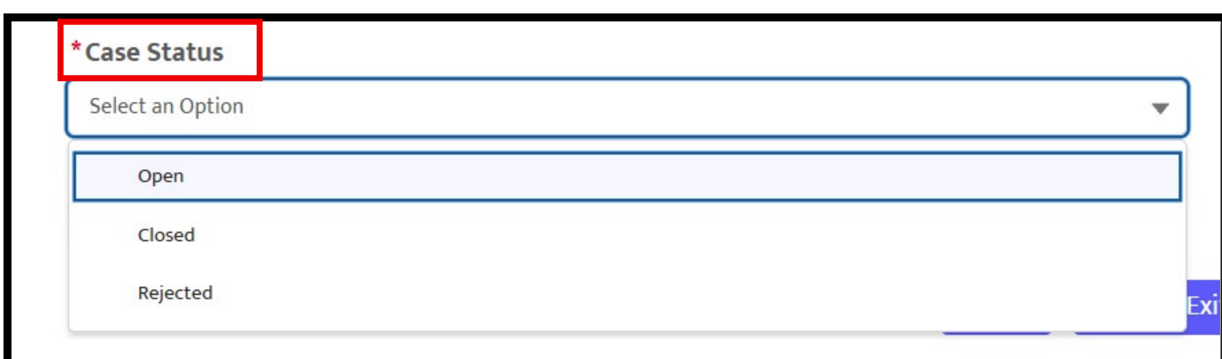
Step 2: In the new tab, select the **Forms** sub-section. From there, click **New** to retrieve the form.



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

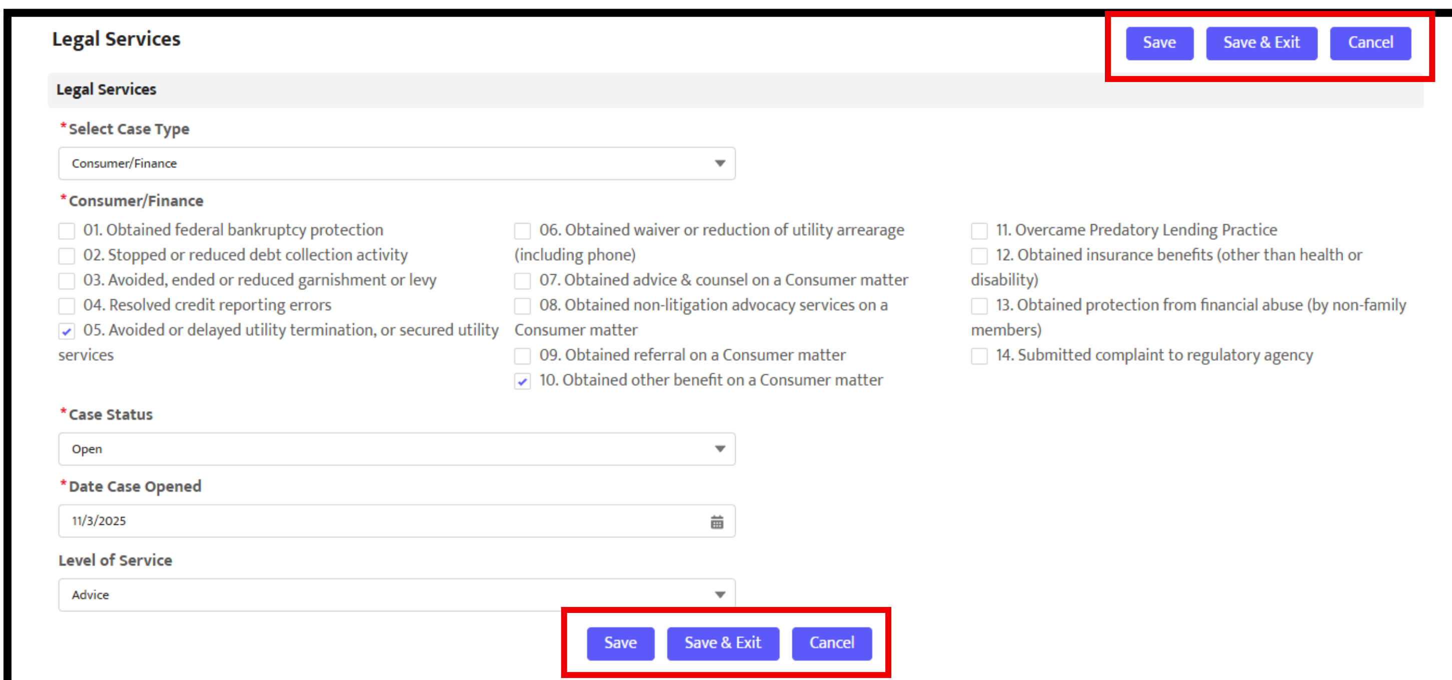


Step 4: Each **Case Type** category will populate applicable check boxes. Check any and all boxes that reflect the level of service that was provided and outcome of the matter.



Step 5: Select **Case Status.**

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**.**



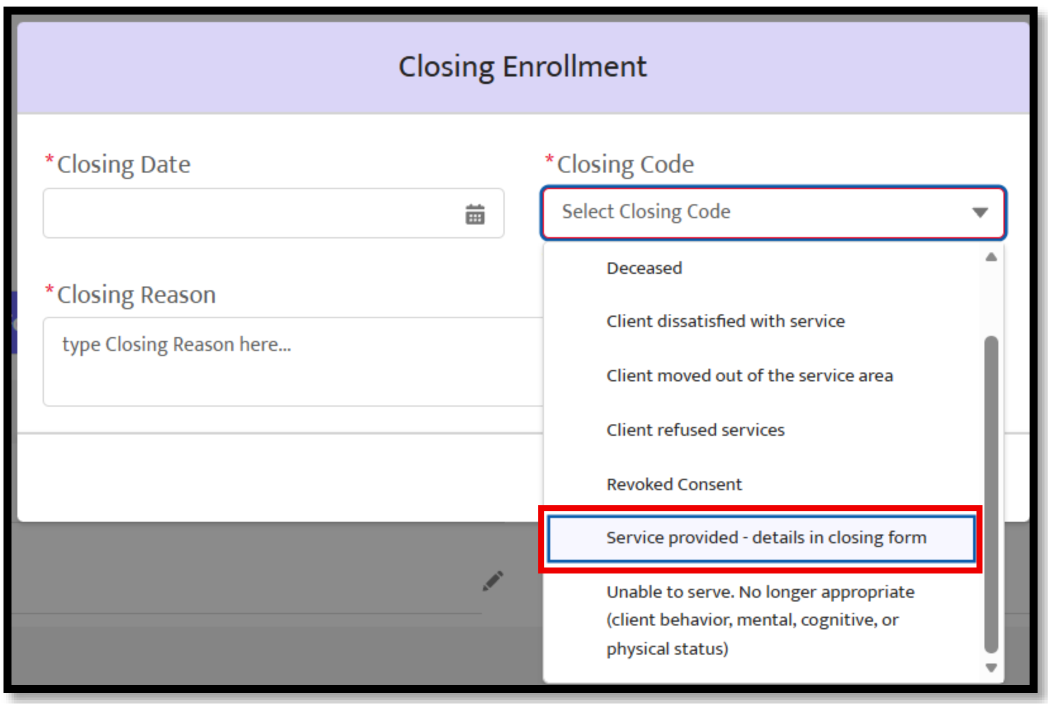
Step 7: Click **Save** or **Save & Exit** to record the entry or cancel to exit the form without saving.

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**.

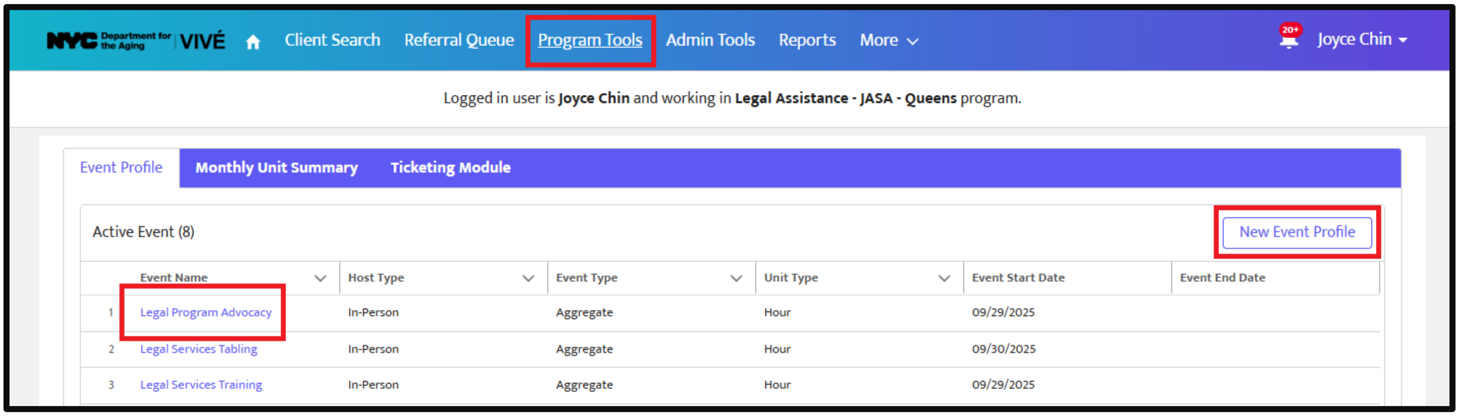
Next, enter the **Closing Date**, select a **Closing Code** from the drop-down menu, and type in the **Closing Reason** for the enrollment.



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

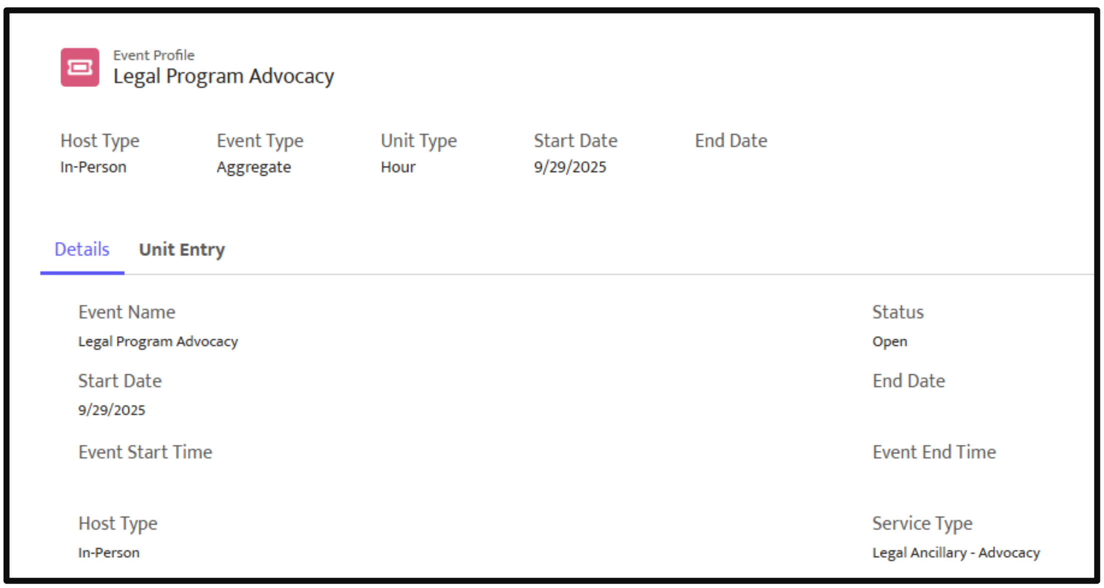
Event Unit Entry

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.

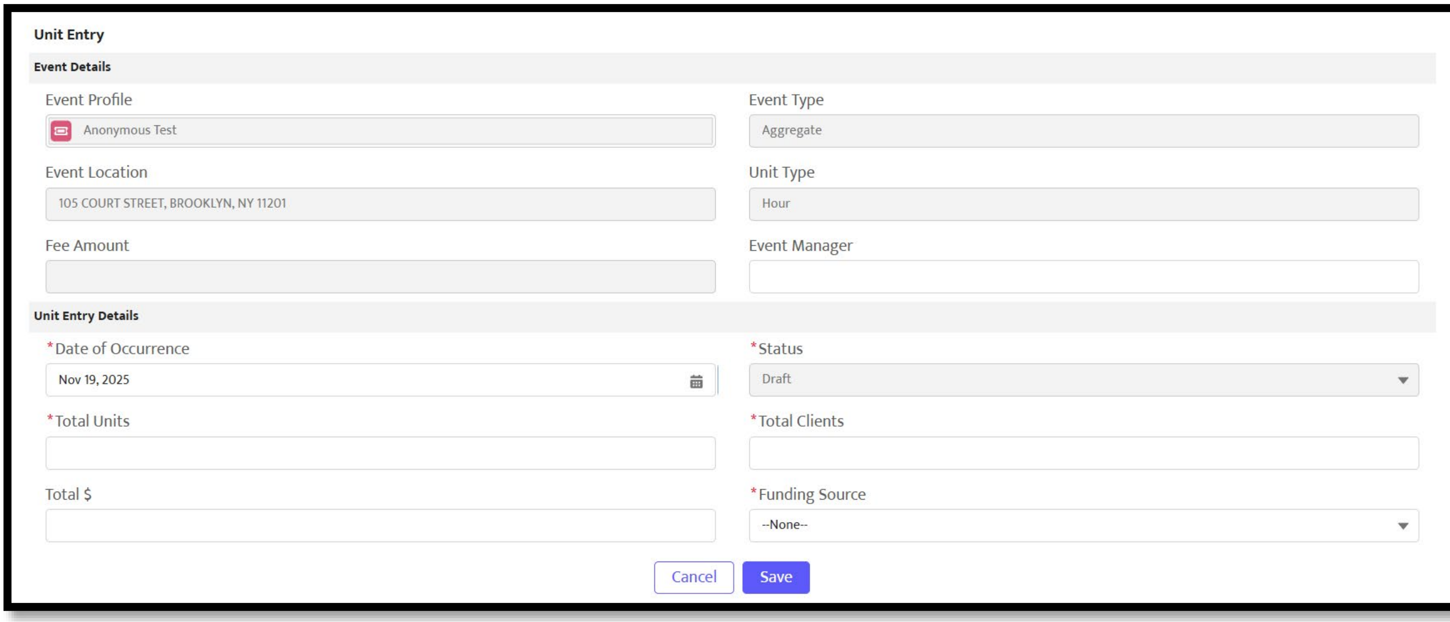


Step 1: Click on **Program Tools** to then click on **Event Profile** tab to access events.

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**.



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:

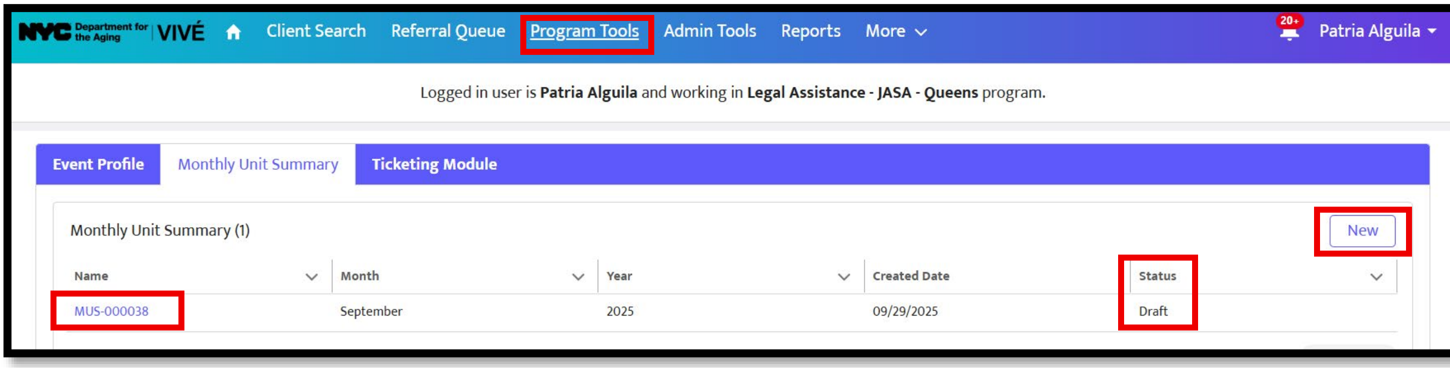
- First name: use the assigned de-identified client ID that is generated by Legal Server
- Last name: use the program's acronym (i.e., JASA, BLS, or BxLS)
- Date of Birth: at least 60 years old (01/01/1965)
- Address: use the site's address

If client provides consent later, programs can update the client profile information to reflect the client's name, address, and DOB.

Monthly Unit Summary

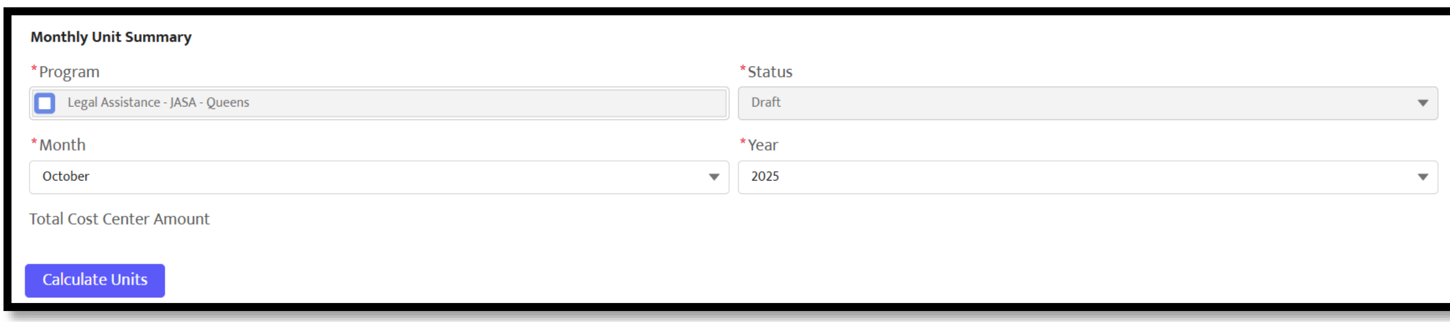
The **Monthly Unit Summary** reports the summary of units recorded in a month and must be included with the monthly invoice. The report should not be finalized until all client service and event units have been confirmed. ***Once a report is finalized, units can no longer be entered or edited. If you 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**.



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.



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

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.