

Monthly Unit Summary Report

The Monthly Unit Summary Report (**MUS**) summarizes entered units rolled up to cost center by service type in a month. This can assist with tracking, assessing and correcting units during the month. Eventually, this report will be attached to one's invoice.

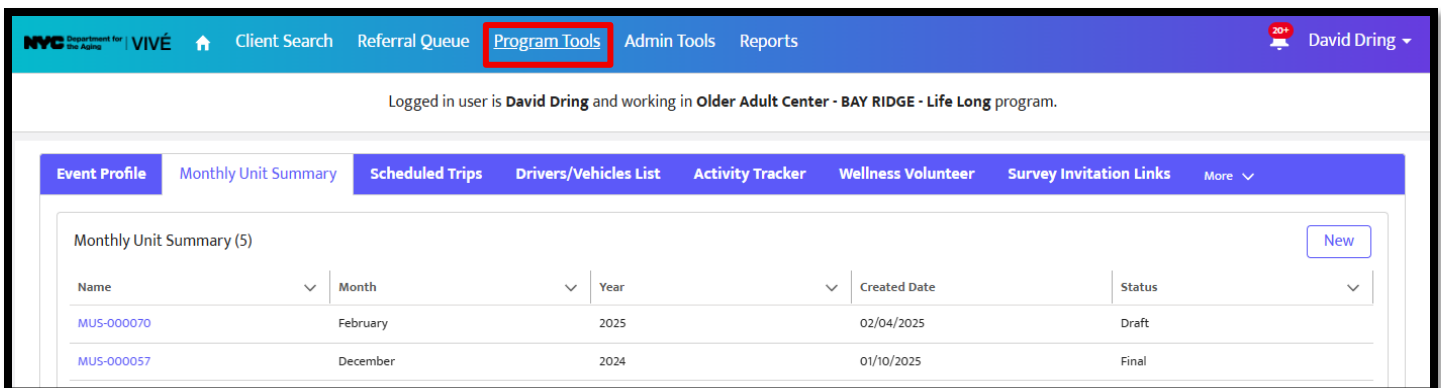
Once you have confirmed these amounts, you must finalize the report.

Once a report is finalized, additional units for that specific month can no longer be entered. The current units for that month can no longer be edited. To unlock the MUS, contact your program officer.

We recommend limiting use of this option to the person responsible for units, or their designee.

Creating a Monthly Unit Summary Report

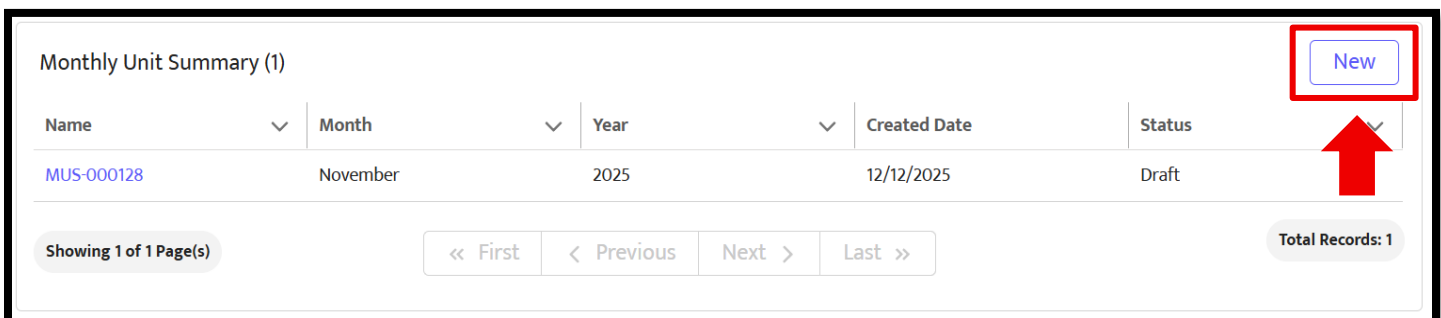
Step 1: From the **Top Menu**, click on **Program Tools** (1). Then click on **Monthly Unit Summary** (2).



Logged in user is David Dring and working in Older Adult Center - BAY RIDGE - Life Long program.

Name	Month	Year	Created Date	Status
MUS-000070	February	2025	02/04/2025	Draft
MUS-000057	December	2024	01/10/2025	Final

Step 2: Click on the **New** button.



Name	Month	Year	Created Date	Status
MUS-000128	November	2025	12/12/2025	Draft

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

Step 3: You must select the month and year. Then click **Calculate Units** button for that period.

Monthly Unit Summary

* Program: Older Adult Center - BAY RIDGE - Life Long

* Status: Draft

* Month: March

* Year: 2025

Total Cost Center Amount

Calculate Units

Step 4: After selecting **Calculate Units**, the page will extend enabling you to enter **Cost Amount** for each listed category. **After** entering the information there are 3 actions:

- **Save:** Save the MUS to view another time
- **Cancel:** Cancel this view and return to the previous screen
- **Finalize:** Finalize this month's MUS to change all units from a status of **Draft** to a status of **Final**. **You will no longer be able to add or edit units for this month. Contact your program officer if you finalized this month in error.**

12. Senior Center Education/Recreation

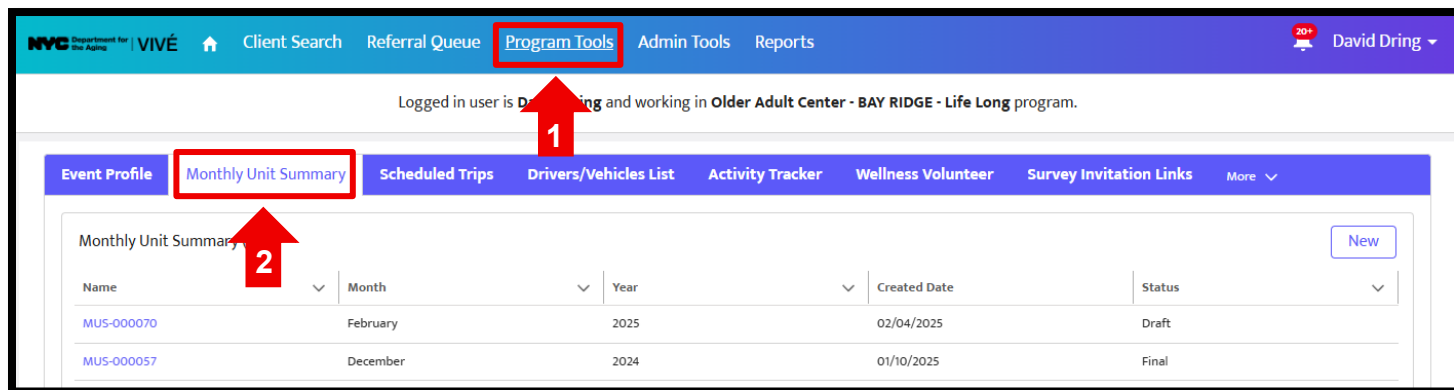
Cost Amount: \$0.00

Service Types	Total Units	Total Amount
> Technology	0	\$ 0
> Arts and Culture	1	\$ 0

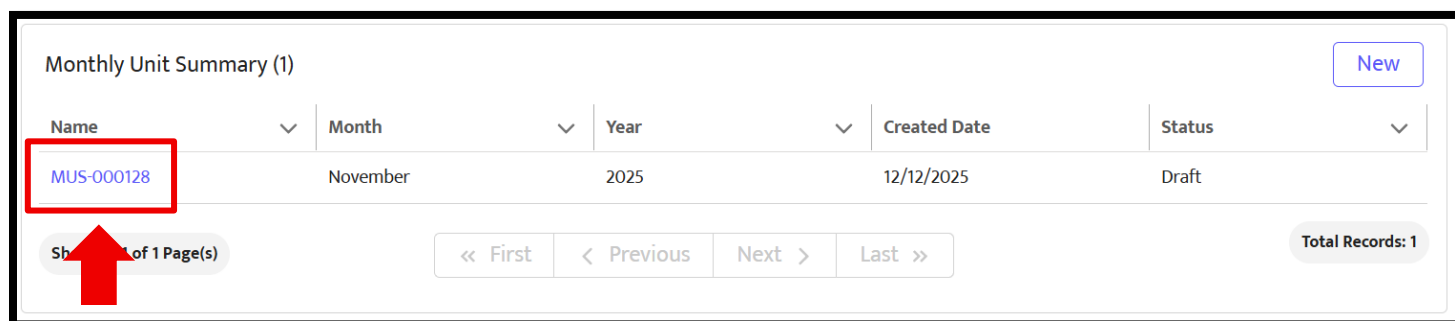
Cancel Save Finalize

Viewing or Editing a Monthly Unit Report

Step 1: From the **Top Menu**, click on **Program Tools** (1). Then click on **Monthly Unit Summary** (2).

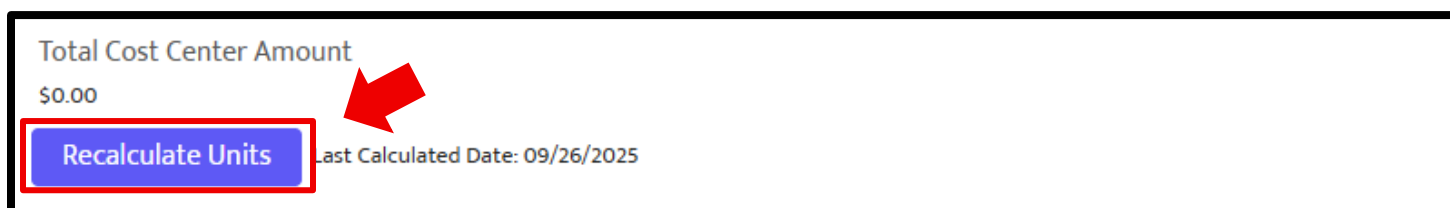


Step 2: To View or Edit a **Monthly Unit Summary** report select the hyperlink report name.



Step 3: You will then see the **Monthly Unit Summary Report**. If you are attempting to adjust that month's units, click **Recalculate Units**.

This button ensures all units are included since the last time you viewed or saved the monthly unit summary.



Step 4. Once you have recalculated units, you'll be able to see the units' totaled units and amounts by cost center for that month.

*Month: October *Year: 2025

Total Cost Center Amount: \$0.00

[Recalculate Units](#) Last Calculated Date: 12/18/2025

Cost Center Allocation

1. Assistance & Benefits

Cost Amount: \$0.00

Step 5: Click the right-facing arrow next to a cost center to view the individual units associated with the cost center.

1. Assistance & Benefits

Cost Amount: \$0.00

Service Types

▼ Case Assistance Total Units: 3 Total Amount: \$ 0

Unit Entry #	Date of Occurrence	Service Type	Source	Status	Created Date	Units	Amount \$
UE-23168276	10/10/2025	Case Assistance	Enrollment	Draft	10/10/2025	1	
UE-23168254	10/09/2025	Case Assistance	Client	Draft	10/09/2025	1	
UE-23168238	10/08/2025	Case Assistance	Client	Draft	10/08/2025	1	

Step 6: You can view or edit unit details by clicking the link in the **Unit Entry** column. The information will appear in a new tab.

Service Types

▼ Case Assistance Total Units: 3 Total Amount: \$ 0

Unit Entry #	Date of Occurrence	Service Type	Source	Status	Created Date	Units	Amount \$
UE-23168276	10/10/2025	Case Assistance	Enrollment	Draft	10/10/2025	1	
UE-23168254	10/09/2025	Case Assistance	Client	Draft	10/09/2025	1	
UE-23168238	10/08/2025	Case Assistance	Client	Draft	10/08/2025	1	

2. Congregate Meals

Cost Amount: \$0.00

Service Types

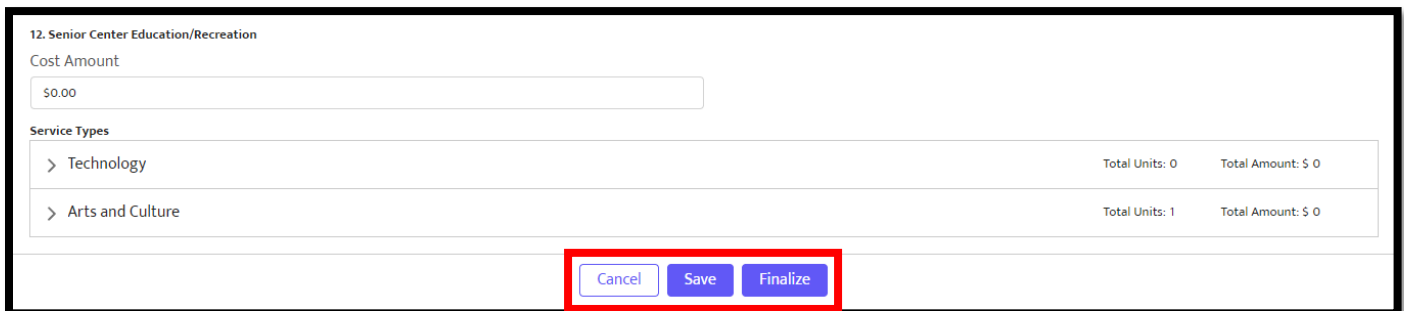
> Congregate Lunch Total Units: 0 Total Amount: \$ 0

Note: *Source Type* indicates where the unit was entered:

- Enrollment — entered from the Enrollment menu
- Client — entered from the Details menu
- Event — entered in the Event Profile

Step 7: After viewing or editing the information there are 3 actions:

- **Save:** Save the MUS to view another time
- **Cancel:** Cancel this view and return to the previous screen
- **Finalize:** Finalize this month's MUS to change all units from a status of **Draft** to a status of **Final**. **You will no longer be able to add or edit units for this month. Contact your program officer if you finalized this month in error.**



12. Senior Center Education/Recreation

Cost Amount

\$0.00

Service Types

> Technology	Total Units: 0	Total Amount: \$ 0
> Arts and Culture	Total Units: 1	Total Amount: \$ 0

Cancel Save Finalize

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](#)