

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.

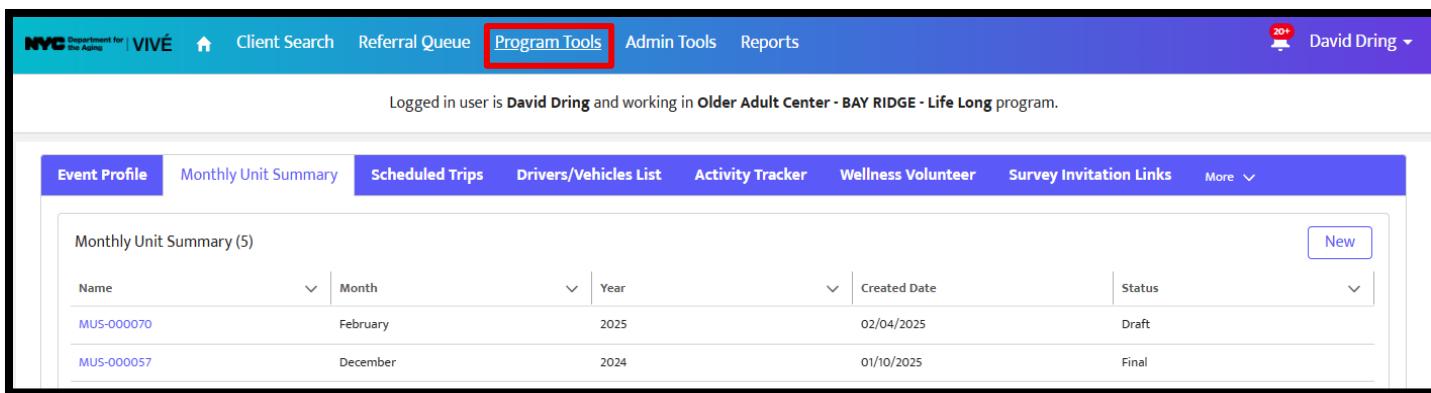
Once you have confirmed these amounts, you must finalize the report.

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.

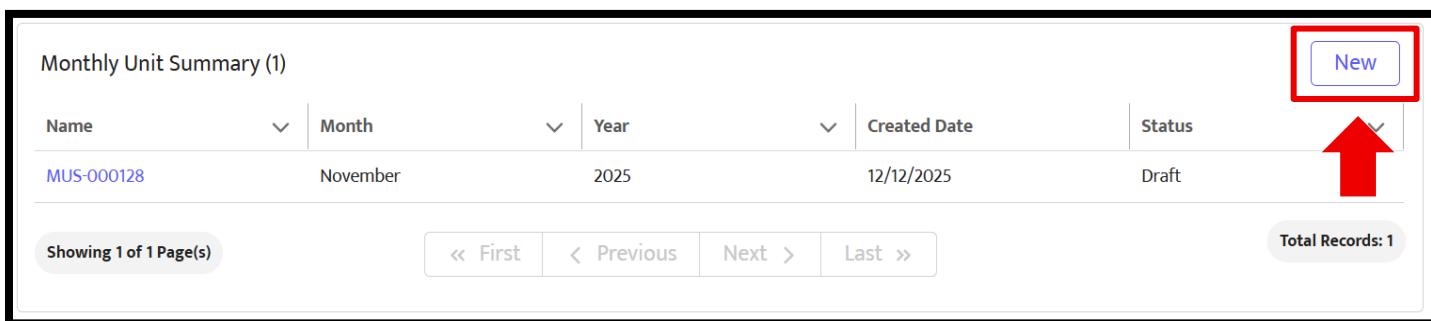
Creating a Monthly Unit Summary Report

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



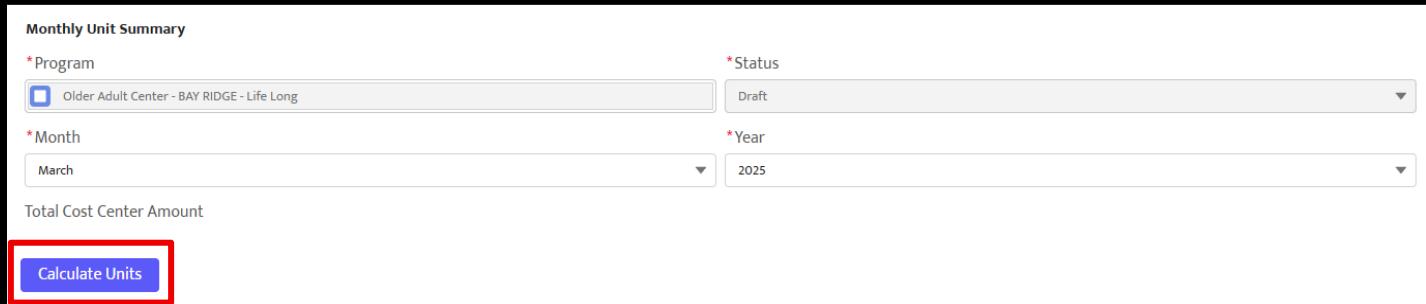
The screenshot shows the VIVÉ software interface. At the top, there is a navigation bar with links for Client Search, Referral Queue, **Program Tools** (which is highlighted with a red box), Admin Tools, and Reports. On the far right, there is a user profile for 'David Dring' with a notification badge showing '20+'. Below the navigation bar, a message states 'Logged in user is David Dring and working in Older Adult Center - BAY RIDGE - Life Long program.' The main content area has a blue header bar with tabs: Event Profile, Monthly Unit Summary (which is selected and highlighted in blue), Scheduled Trips, Drivers/Vehicles List, Activity Tracker, Wellness Volunteer, Survey Invitation Links, and More. Under the 'Monthly Unit Summary' tab, there is a table showing two entries: 'MUS-000070' for February 2025 (status: Draft) and 'MUS-000057' for December 2024 (status: Final). A 'New' button is located in the top right corner of this section.

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



The screenshot shows the 'Monthly Unit Summary (1)' creation page. It features a form with fields for Name, Month, Year, Created Date, and Status. The 'Name' field contains 'MUS-000128', 'Month' is 'November', 'Year' is '2025', 'Created Date' is '12/12/2025', and 'Status' is 'Draft'. A large red arrow points to the 'New' button in the top right corner of the form area. At the bottom of the page, there is a pagination bar with buttons for 'First', 'Previous', 'Next', and 'Last', and a message 'Showing 1 of 1 Page(s)'. On the right, there is a 'Total Records: 1' indicator.

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

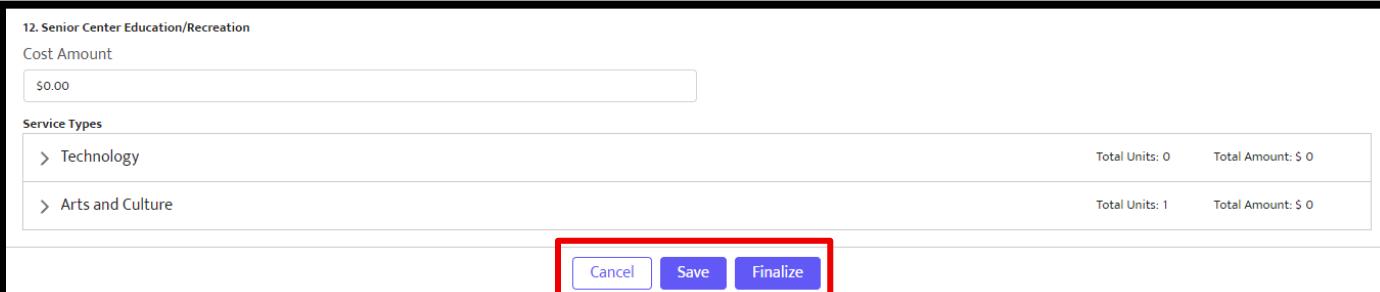
*Year: 2025

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

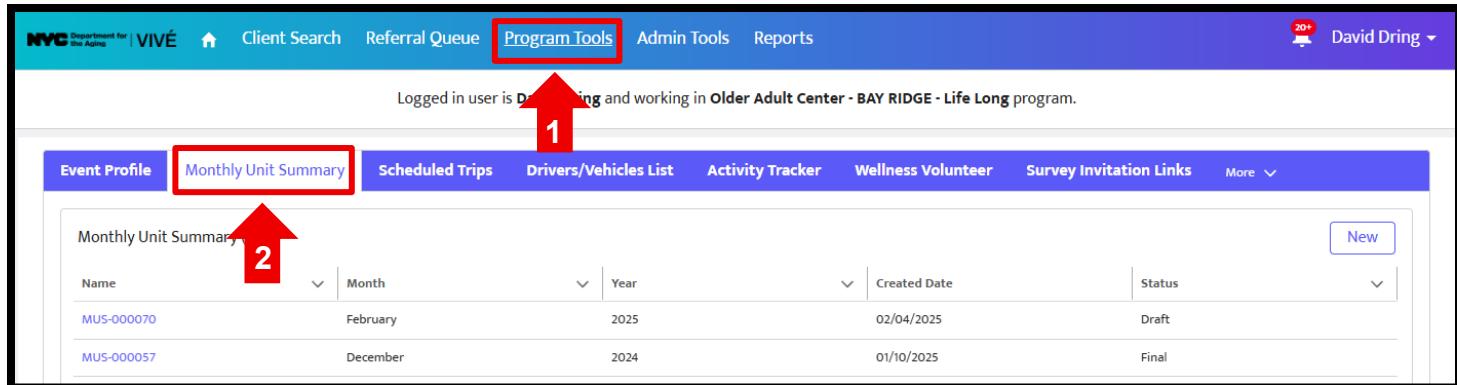
Service Types

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

Cancel **Save** **Finalize**

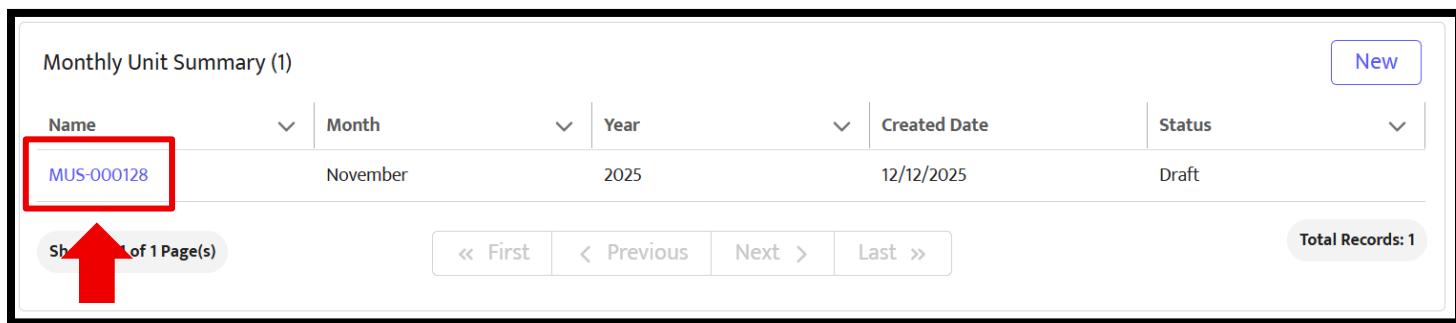
Viewing or Editing a Monthly Unit Report

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



The screenshot shows the VIVE program tools interface. The top navigation bar includes 'Client Search', 'Referral Queue', 'Program Tools' (which is highlighted with a red box and a red arrow labeled '1'), 'Admin Tools', and 'Reports'. A user profile for 'David Dring' is shown on the right. Below the navigation is a message: 'Logged in user is David Dring and working in Older Adult Center - BAY RIDGE - Life Long program.' The main content area displays a table for 'Monthly Unit Summary'. The table has columns for 'Name', 'Month', 'Year', 'Created Date', and 'Status'. Two rows are visible: 'MUS-000070' (February, 2025, 02/04/2025, Draft) and 'MUS-000057' (December, 2024, 01/10/2025, Final). A red box and arrow labeled '2' points to the 'Monthly Unit Summary' link in the navigation bar.

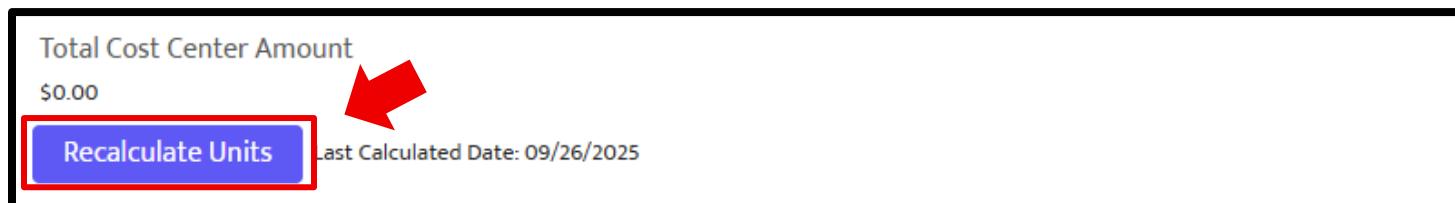
Step 2: To View or Edit a **Monthly Unit Summary** report select the hyperlink report name.



The screenshot shows the 'Monthly Unit Summary' report detail page. The top navigation bar is identical to the previous screenshot. The main content area shows a table with the same columns as the list view. A single row is selected for 'MUS-000128' (November, 2025, 12/12/2025, Draft). A red box and arrow labeled '1' points to the 'MUS-000128' link. At the bottom of the page, there is a message 'Showing 1 of 1 Page(s)' and navigation buttons for 'First', 'Previous', 'Next', and 'Last'. A 'Total Records: 1' button is also present.

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.



The screenshot shows the 'Monthly Unit Summary Report' page. It displays a 'Total Cost Center Amount' of '\$0.00'. Below this is a red box and arrow labeled '2' pointing to a blue button labeled 'Recalculate Units'. To the right of the button, the text 'Last Calculated Date: 09/26/2025' is displayed.

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 *Year

Total Cost Center Amount
\$0.00

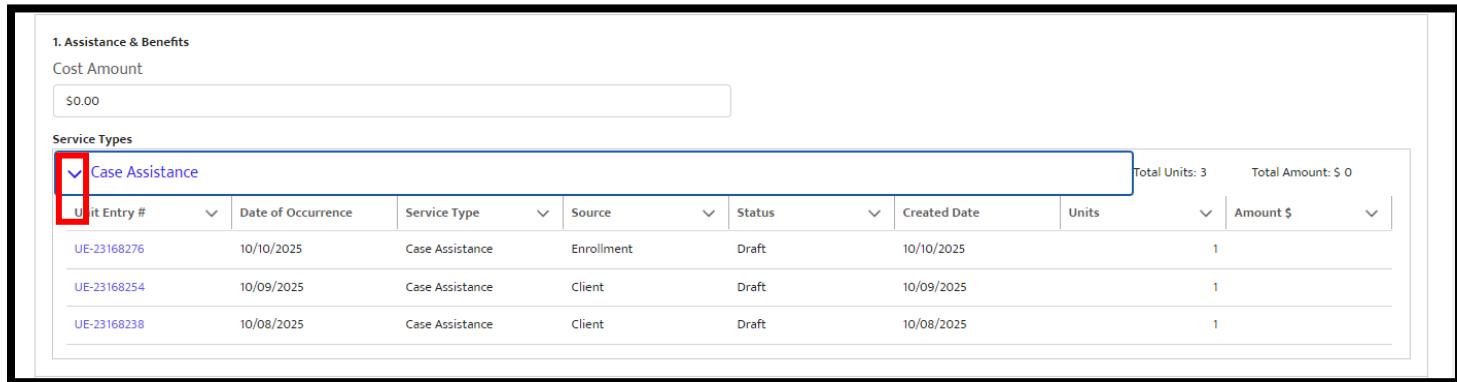
Recalculate Units Last Calculated Date: 12/18/2025

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

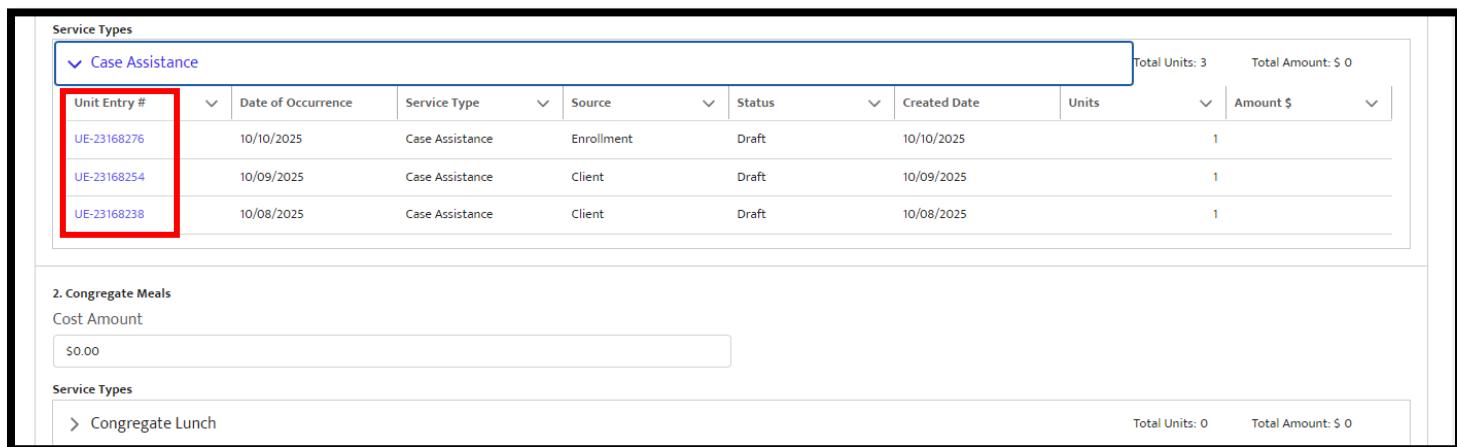
Cost Amount
\$0.00

Service Types

Case Assistance

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

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

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](#)