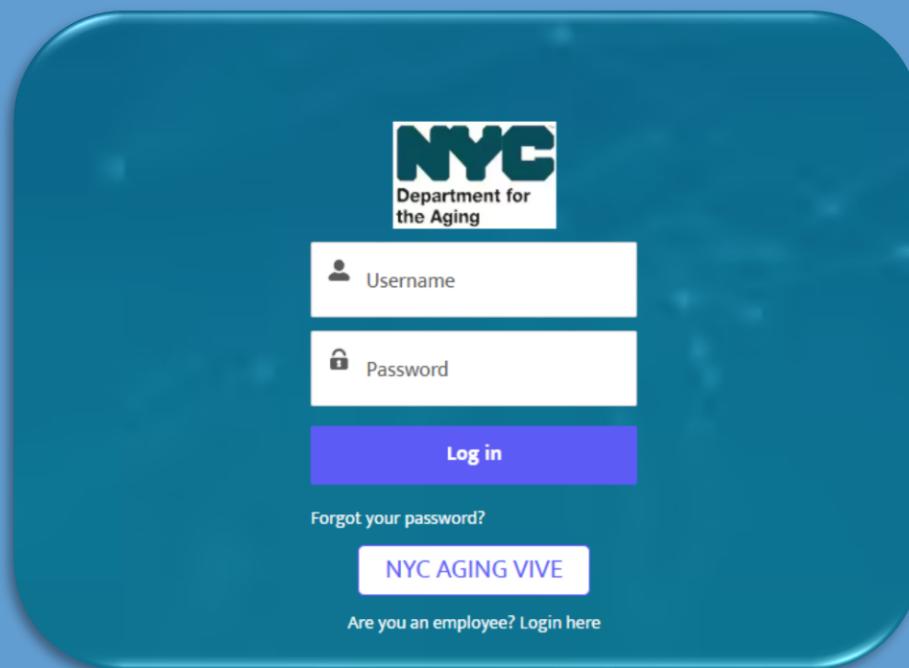


## VIVÉ CMA LAB #2: MY TASKS & MY FOLLOW-UPS: COMPLETION STEPS



Thanks for Joining!

## Goal of VIVÉ “Labs”

*To clarify and review  
specific CMA “workflow”  
functions in VIVÉ.*



**Definitions  
Navigation  
Functionality**

# VIVÉ: CMA Lab

## FEATURES PURPOSE & FUNCTION



## MY TASKS: CREATION, UPDATES & COMPLETION



## MY FOLLOW UPS: CREATION, UPDATES & COMPLETION



## FEATURES PURPOSE & FUNCTION

**My Tasks** is a **program specific** “tickler” for yearly client profile updates . My Tasks automatically alerts all your VIVÉ program users of the clients who need their records updated.

**My Follow Ups** is a **user specific** “tickler” for assigned client requests. My Follow Ups are generated by either the user themselves or another program user.





# My Tasks: Creation, Updates & Completion

# MY TASKS:

## Table Headers

### My Tasks



| Task: Task Number | Subject              | Client Name        | Task Status | Actions | Priority | Created Date ↓     |
|-------------------|----------------------|--------------------|-------------|---------|----------|--------------------|
| T-07466           | Client Re-assessment | Alastair Cook      | Open        | -       | Normal   | 1/16/2026, 5:00 AM |
| T-07467           | Client Re-assessment | Dionne Client      | Open        | -       | Normal   | 1/16/2026, 5:00 AM |
| T-07474           | Client Re-assessment | Amber Client       | Open        | -       | Normal   | 1/16/2026, 5:00 AM |
| T-07249           | Client Re-assessment | Tallulah T. Client | Open        | -       | Normal   | 1/14/2026, 5:00 AM |
| T-07282           | Client Re-assessment | Christopher Lee    | Open        | -       | Normal   | 1/14/2026, 5:00 AM |
| T-07123           | Client Re-assessment | Boris Karloff      | Open        | -       | Normal   | 1/10/2026, 5:00 AM |

[View Report \(My Tasks\)](#)

As of Jan 16, 2026, 5:59 PM

**Note:** Can only sort table by *Created Date*. Select *View Report* for more sorting options.

# MY TASKS:

## *View Report Headers and Sorting Features*

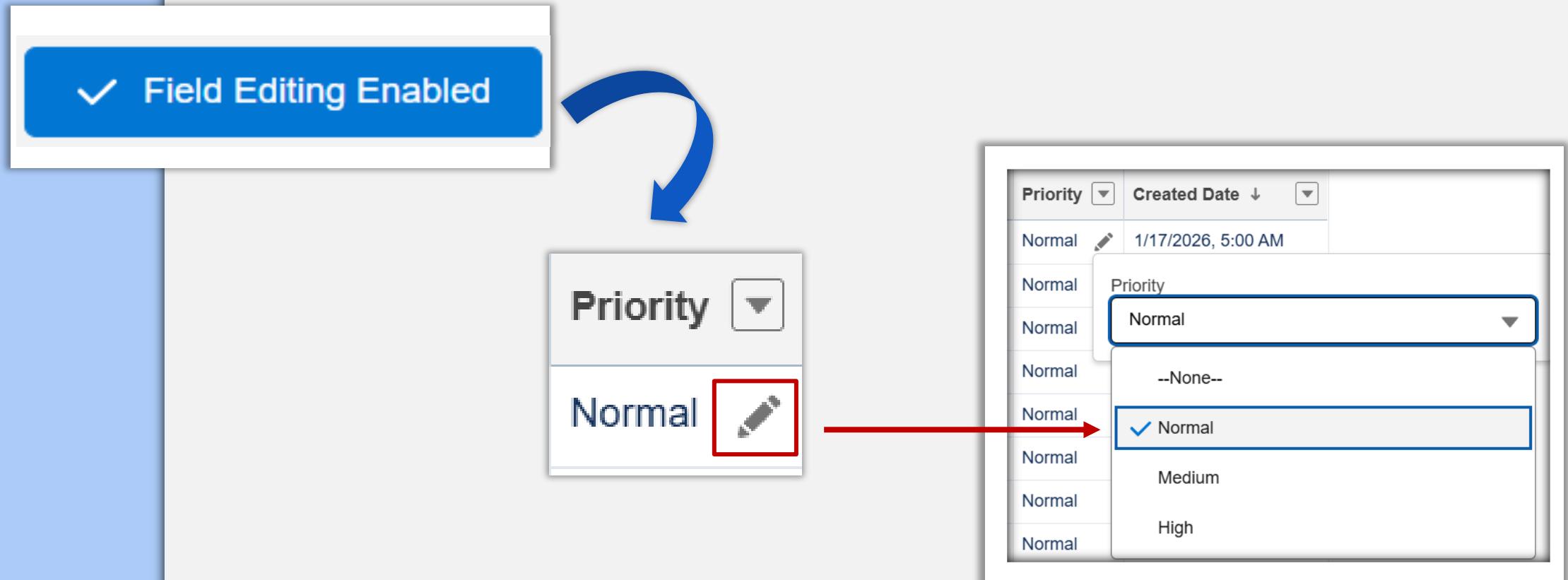
The screenshot shows a task management application interface. At the top left is a teal icon with a white document and a bar chart, labeled "Report: Tasks with Program". Next to it is the title "My Tasks". To the right are several buttons: "Enable Field Editing" (with a blue pen icon), a magnifying glass for search, "Add Chart", a filter icon, a refresh/circular arrow icon, and an "Export" button (all with red outlines). Below this is a section for "Total Records" showing "152". The main area is a table header with columns: "Task: Task Number", "Subject", "Client Name", "Task Status", "Actions", "Priority", and "Created Date". Each column has a downward arrow indicating it is sortable. Red arrows point from the text "View Report Headers and Sorting Features" in the header to the "Client Name", "Task Status", "Actions", and "Priority" columns.

| Task: Task Number | Subject | Client Name | Task Status | Actions | Priority | Created Date |
|-------------------|---------|-------------|-------------|---------|----------|--------------|
|-------------------|---------|-------------|-------------|---------|----------|--------------|

**Note:** Can use **Export** button to download report to Excel for further sorting.

# MY TASKS:

## *View Report Enable Field Editing Feature*



**Note:** Use *Enable Field Editing Feature* to edit certain fields from *View Reports*.

# MY TASKS:

## *Editing specific My Task from Task Details Screen Page*

Task  
T-07466

**Details**

|                                 |                    |                          |                                |
|---------------------------------|--------------------|--------------------------|--------------------------------|
| Task Number                     | T-07466            | Subject                  | Client Re-assessment           |
| Task Status                     | Open               | Assessment               | AS-352653                      |
| Priority                        | Normal             | Actions                  |                                |
| Did you Speak with the client ? |                    | <input type="checkbox"/> |                                |
| Created Date                    | 1/16/2026, 5:00 AM | Program                  | Case Management - ENCORE - CMA |
| Last Modified By                | Batch Process      | Last Modified Date       | 1/16/2026, 5:00 AM             |

**Exit**

# MY TASKS:

*Update  
Choices*

**Task Status**

Open

--None--

Open

In Progress

Closed

**Priority**

Normal

--None--

Normal

Medium

High

# MY TASKS:

*Update  
Choices*

Did you Speak with the client ?

--None--

✓ --None--

Yes

No, 1st attempt

No, 2nd attempt

No, 3rd attempt

No, incorrect/missing contact information

\*Actions

--None--

✓ --None--

Attempted, but the client refused.

Client/representative unable to provide updates.

Re-Assessment completed

Attempted, but the client is unavailable

## Steps to Update a My Tasks Record

1. Select the *Task: Task Number* *hyperlink*
2. Select any pencil icon on the *Details* screen
3. Update desired fields using *dropdown choices*
4. Select *Save*
5. *Refresh the Dashboard Screen* to see updates on *My Task List View*



## Details

\* = Required Information

Task Number

T-07522

Task Status

Open

Priority

High

Did you Speak with the client ?

No, 1st attempt

Created Date

1/17/2026, 5:00 AM

Last Modified By

Batch Process

Subject

Client Re-assessment

Assessment

AS-342311

\* Actions

Attempted, but the client is unavailable

Program

Case Management - ENCORE - CMA

Last Modified Date

1/17/2026, 5:00 AM

Cancel

Save

## Steps to Close out a My Tasks Record

1. Select the *Task: Task Number* hyperlink
2. Select any pencil icon on the *Details* screen
3. Update *Actions* to “Re-Assessment Completed”
4. Update *Task Status* to “Closed”
5. Select *Save*
6. *Refresh* the *Dashboard* Screen to see updates on *My Task List View*



## Details

\* = Required Information

Task Number

T-07522

Task Status

Closed

Priority

Normal

Did you Speak with the client ?

Yes

Created Date

1/17/2026, 5:00 AM

Last Modified By

Batch Process

Subject

Client Re-assessment

Assessment

AS-342311

\*Actions

Re-Assessment completed

Program

Case Management - ENCORE - CMA

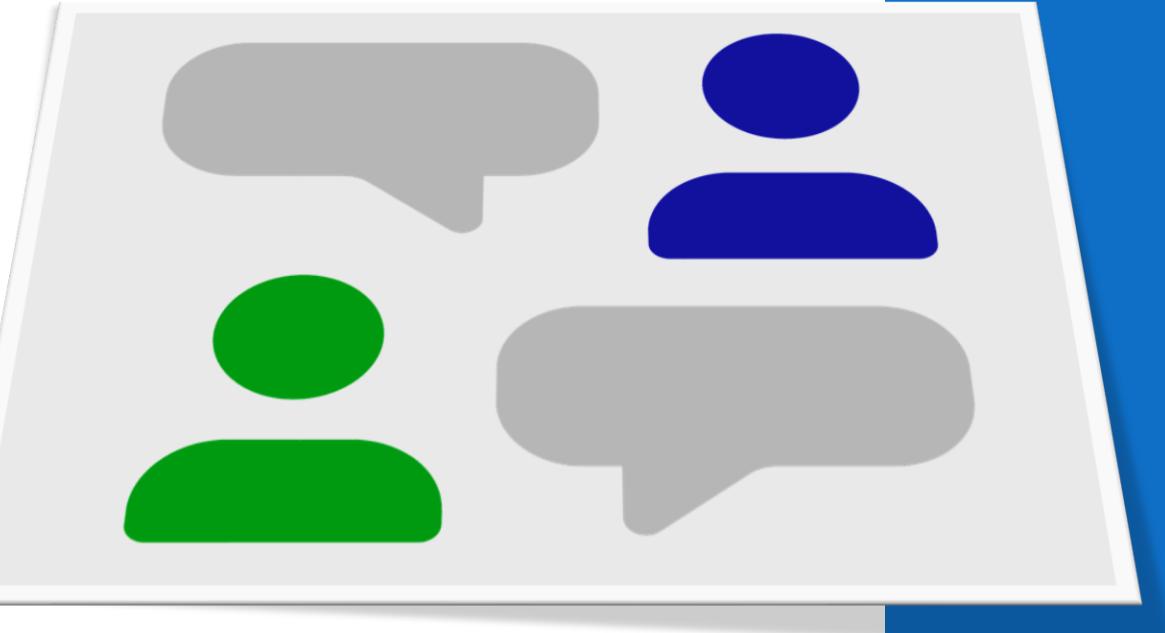
Last Modified Date

1/17/2026, 5:00 AM

Cancel

Save

**Remember: Task Status must be marked as "Closed" for Reassessment to be removed from My Tasks list view**



# My Follow Ups: Creation, Updates & Completion

# MY FOLLOW-UPS:

## *Table Headers*

### My Follow-Ups

| Enrollment: Enrollment Name ↑  | Follow up Request: Subject                             | Status   | Client Name       | Follow-up Due Date  |
|--------------------------------|--|----------|-------------------|---------------------|
| Case Management - NSHOPP - CMA | Contact to see if returning home on January 12th       | Open     | Claude R Client   | 1/9/2026, 9:30 AM   |
| Case Management - NSHOPP - CMA | Call Ophelia's Daughter regarding Return from Hospital | Open     | Ophelia O Client  | 10/28/2025, 9:00 AM |
| Case Management - NSHOPP - CMA | Contact Ophelia Return from Hospital?                  | Open     | Ophelia O Client  | 10/17/2025, 3:50 PM |
| Case Management - NSHOPP - CMA | Check on Ursala - Back from Hospital                   | Open     | Ursala Client     | 10/23/2025, 9:00 AM |
| Case Management - NSHOPP - CMA | Check on Victor to see if return from hospital         | Open     | Victor V Client   | 11/6/2025, 11:07 AM |
| Case Management - NSHOPP - CMA | Phone Call for SNAP                                    | Inactive | Adina A Client    | 12/30/2025, 5:00 PM |
| Case Management - NSHOPP - CMA | Check in with Theodore - Hospital Return Home          | Open     | Theodore T Client | 11/6/2025, 11:30 AM |

[View Report \(My Follow-Ups\)](#)

As of Jan 19, 2026, 8:04 PM

**Note: Table cannot be sorted. Select View Report for more sorting options.**

# MY FOLLOW-UPS:

## *View Report Headers and Sorting Features*

Report: Enrollments with Follow up Requests and Program

**My Follow-Ups**

Total Records  
10

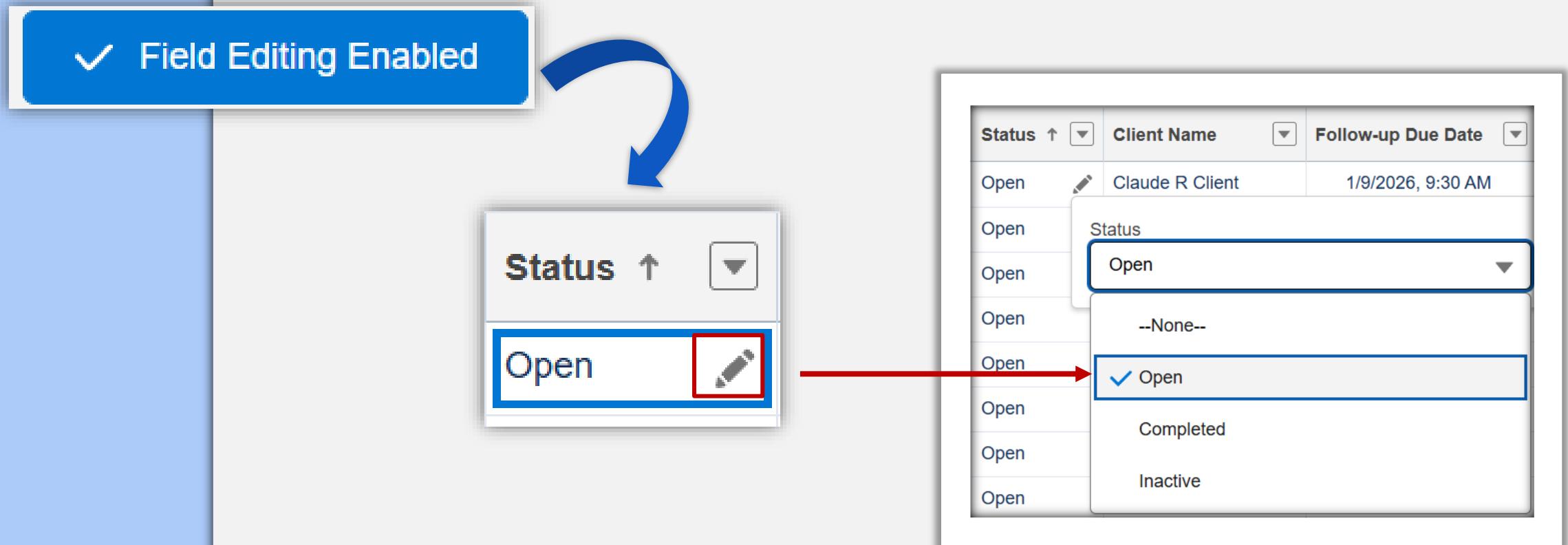
Enrollment: Enrollment Name ▾ Follow up Request: Subject ▾ Status ↑ ▾ Client Name ▾ Follow-up Due Date ▾

**Enable Field Editing**     **Export**

**Note: Can use Export button to download report to Excel for further sorting.**

# MY FOLLOW-UPS:

## *View Report Enable Field Editing Feature*



**Note: Use *Enable Field Editing Feature* to edit certain fields from *View Reports*.**

# MY FOLLOW-UPS:

## *Editing specific My Follow-Up from Task Details Screen Page*

Follow up Request  
Contact to see if returning home on January 12th Edit Assigned To

|   |   |
|---|---|
| Follow-up Due Date<br>1/9/2026, 9:30 AM                     | Client Name<br>Claude R Client  |
| Assigned To<br>Karyn Velez                                  | Status<br>Open  |
| Subject<br>Contact to see if returning home on January 12th | Reason  |
| Enrollment<br>Case Management - NSHOPP - CMA                | Last Modified By<br>Karyn Velez   |
| Created By<br>Karyn Velez                                   | <span style="border: 2px solid red; padding: 2px 10px; float: right;">Edit</span> |

Exit

# MY FOLLOW-UPS:

## *Update Choices*

Status

Open

--None--

Open

Completed

Inactive

[Edit Assigned To](#)

Assign Case Manager

\*Assigned To

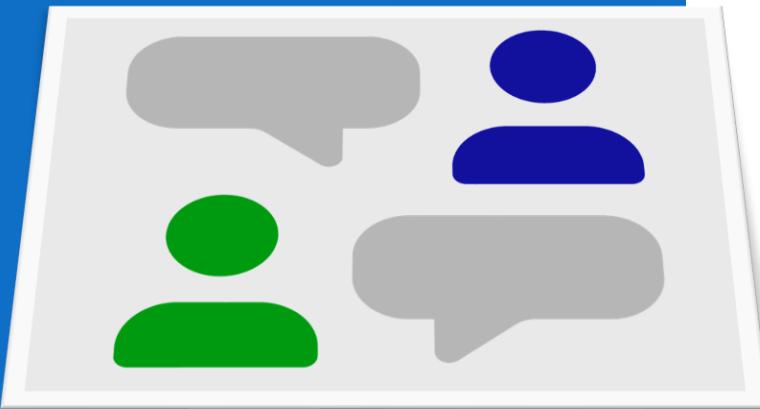
Karyn Velez

Cancel

Submit



## UPDATE CHOICES: ***INACTIVE***



### ***Remember:***

**NEVER CHOOSE ***INACTIVE*** AS ONE OF  
THE FOLLOW-UP STATUS CHOICES .**

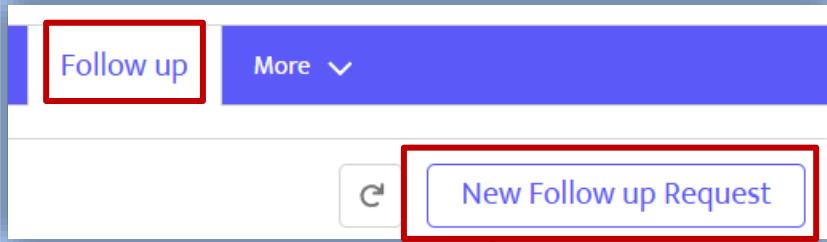
***Choosing the Status of “Inactive” places the  
Follow-Up in a “limbo” state where it cannot  
be removed from the Follow-Ups List View.***

## Steps to Create a My Follow-Ups

1. Select *Enrollment* Tab & Enrollment *hyperlink*
2. Select *Follow Up* Tab & *New Follow up Request* button
3. Complete all *required and optional fields*
  - Be sure *Date* and/or *Time* fields are set in the future
4. Select *Submit*
5. Refresh the *Dashboard* Screen to see update on *My Follow-Ups* List View

**Best Practice Tip: Add text to the *Subject* field that will help you easily understand the purpose of the Follow-Up.**





### Follow-Up Request

\*Assigned To

**Follow-up Due Date**

\*Date  \*Time

\*Subject

Reason

A red arrow points to the 'Assigned To' field, another red arrow points to the 'Date' field, another red arrow points to the 'Time' field, another red arrow points to the 'Subject' field, and a red arrow points to the 'Reason' text area.

## Steps to Update a My Follow-Ups

1. Select the *Follow up Request: Subject* hyperlink
2. Select any *pencil icon* on the *Follow up Request* screen
3. *Update* desired fields and if necessary, *reassign* Follow Up
4. Select *Save*
5. *Refresh* the *Dashboard* Screen to see updates on *My Follow-Ups List View*

**Note: When updating, the Status of the Follow-Up should remain “Open” until the request has been fully resolved.**





Follow up Request

Check in: 15 Day Call for Home Personal Care Service Start

[Edit Assigned To](#)

\* = Required Information

#### Follow-up Due Date

Date

2/11/2026



Time

10:00 AM



Client Name

Efrain Rosa

#### Assigned To

Karyn Velez

#### \*Subject

Check in - Rescheduled: 15 Day Call for Home Personal Care Service Start

Status

Open



#### Enrollment

Case Management - NSHOPP - CMA

#### Created By

Karyn Velez

#### Last Modified By

Karyn Velez

[Cancel](#)

[Save](#)



#### Reason

Contact Ms. Rosa on 2/12 to see how HMP service is going.

UPDATED NOTATION - 1/29/26: Ms. Rosa will be at a doctor's appointment on 2/12. To contact her on 2/11.



## Steps to Close out a My Follow-Ups

1. Select the *Follow up Request: Subject* hyperlink
2. Select any *pencil icon* on the *Follow up Request* screen
3. Note a brief resolution in *Reason* field
4. Update *Status* field to *Completed*
5. Select *Save*
6. *Refresh* the *Dashboard Screen* – the follow-up will no longer be listed on the *My Follow-Ups* List View





Follow up Request

Check in - Rescheduled: 15 Day Call for Home Personal Care Service Start

[Edit Assigned To](#)

\* = Required Information

#### Follow-up Due Date

Date

Time

2/11/2026



10:00 AM



#### Assigned To

Karyn Velez

#### \*Subject

Check in - Rescheduled: 15 Day Call for Home Personal Care Service Start

#### Enrollment

Case Management - NSHOPP - CMA

#### Created By

Karyn Velez

#### Client Name

Efrain Rosa

#### Status

Completed

#### Reason

Contact Ms. Rosa on 2/12 to see how HMPC service is going.

UPDATED NOTATION - 1/29/26: Ms. Rosa will be at a doctor's appointment on 2/12. To contact her on 2/11.

RESOLUTION - 2/11/26: 15 Day Call for Home Personal Care made - see Case Note for more information.

[Cancel](#)

[Save](#)



# VIVÉ SUPPORT

Reference Guides & Videos On-line



<https://vivesupport.cityofnewyork.us/>



VIVÉ “Labs”



VIVÉ Office Hours & 1 to 1 Meetings



Program Officer



VIVÉ Ticketing System

## UPCOMING “LAB” TOPICS

- Financials & Cost Share: Relationship, Completion & Usage
- Home Care Service Plan: Service Type Options & Usage
- Wait List, IADL/ADLs & Reassessment
- Meal Delivery Plan: On Holds, Resumptions & Service Changes
- Reassessments & the Assessment Form: CAGE, Assistive Devices, Medical Information & Others

