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 <u>all</u> 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 Enable Field Editing Feature

Field Editing Enabled

Priority
Normal

Priority ▼	Created Date ↓ ▼
Normal ✏	1/17/2026, 5:00 AM
Normal	
Normal	
Normal	
Normal	
Normal	
Normal	
Normal	
Normal	

Priority
Normal ▼

--None--
✓ Normal
Medium
High
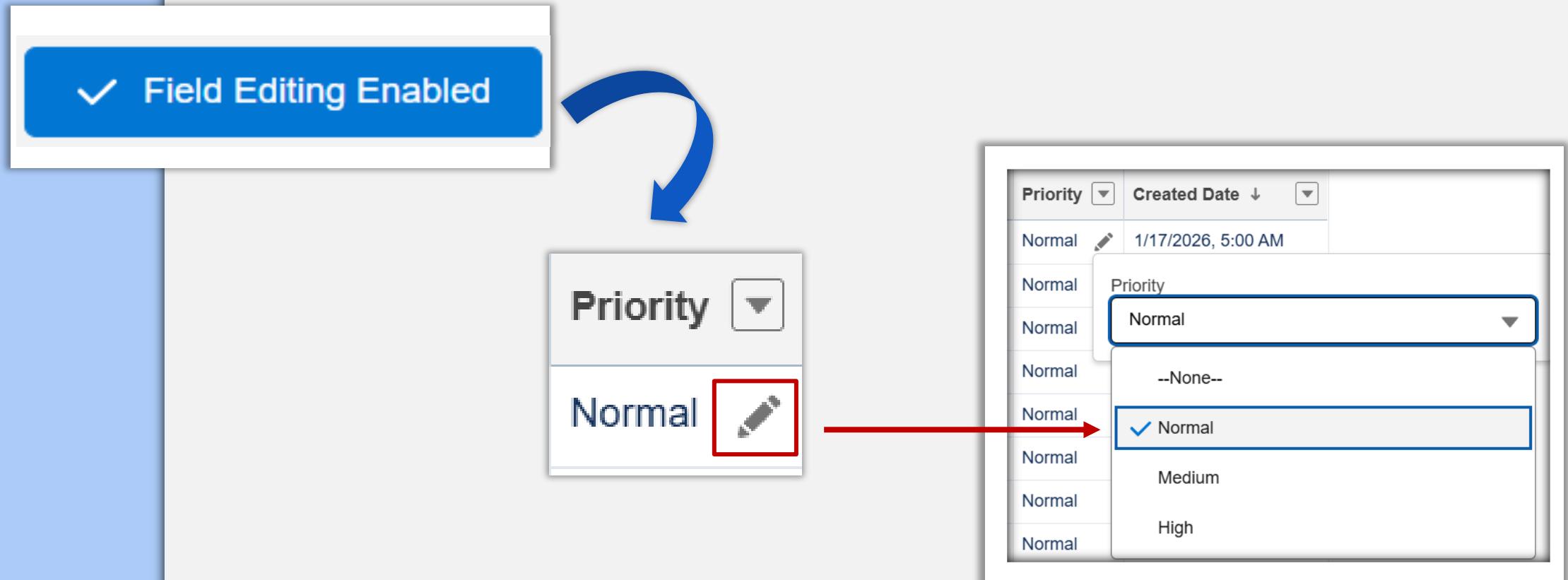
Note: **Use Enable *Field Editing Feature* to edit certain fields from *View Reports*.**

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 ?

Program
Case Management - ENCORE - CMA

Created Date
1/16/2026, 5:00 AM

Last Modified Date
1/16/2026, 5:00 AM

Last Modified By
Batch Process

Exit

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

Subject

Client Re-assessment

Task Status

Open ▼

Assessment

AS-342311

Priority ←

High ▼

*Actions ←

Attempted, but the client is unavailable ▼

Did you Speak with the client ? ←

No, 1st attempt ▼

Program

Case Management - ENCORE - CMA

Created Date

1/17/2026, 5:00 AM

Last Modified Date

1/17/2026, 5:00 AM

Last Modified By

Batch Process

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
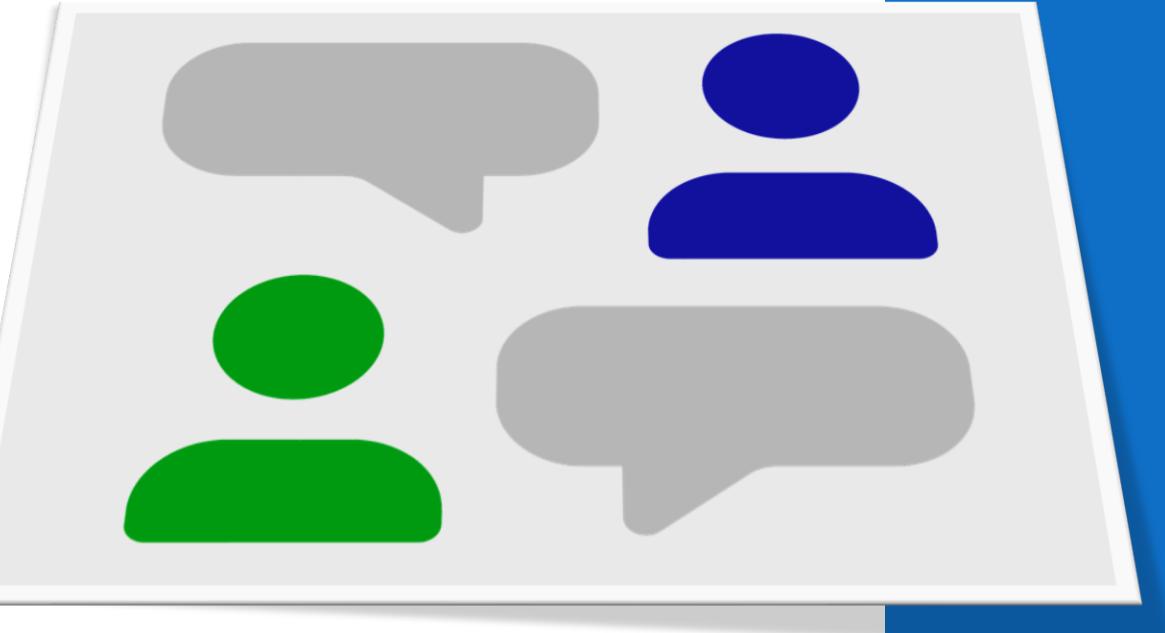
MY FOLLOW-UPS:
Table Headers

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 Enable Field Editing Feature

Field Editing Enabled

Status ↑		Client Name		Follow-up Due Date	
Open	✏	Claude R Client		1/9/2026, 9:30 AM	
Open					
Open					
Open					
Open					
Open					
Open					
Open					
Open					

Status

Open

--None--

✓ Open

Completed

Inactive

Status ↑

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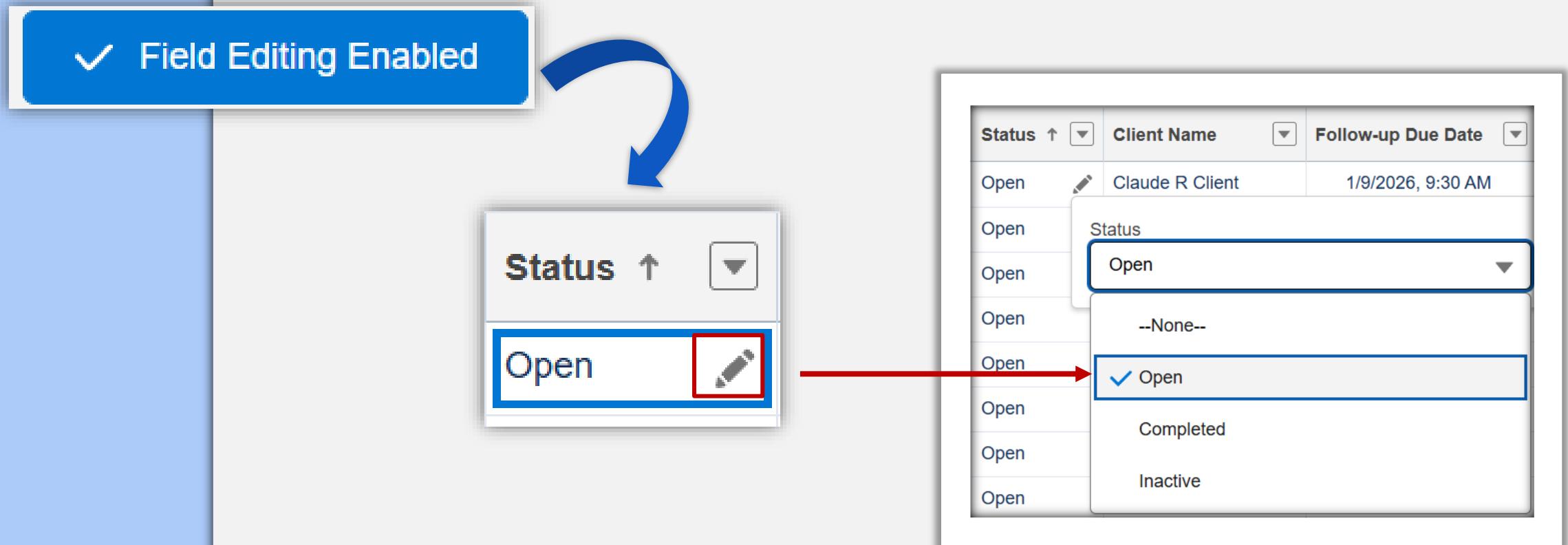
Note: Use *Enable Field Editing Feature* to edit certain fields from *View Reports*.

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
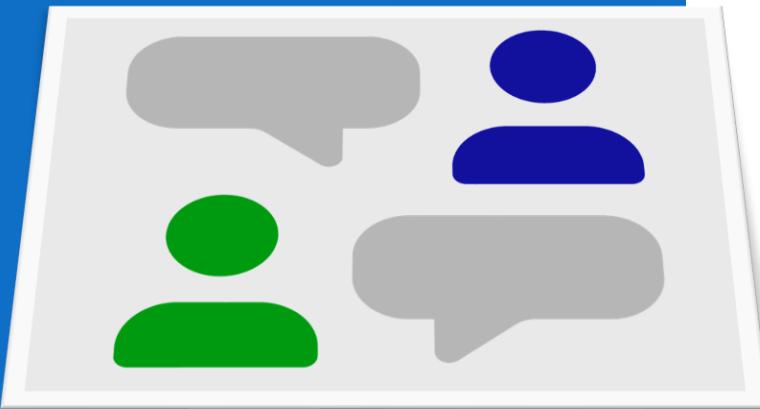
Remember:

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

More ⌄

↻ New Follow up Request
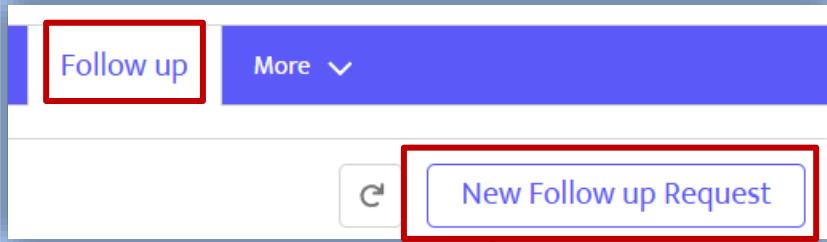
Follow-Up Request

*Assigned To ←

Karyn Velez ▼

Follow-up Due Date

*Date ←   *Time ←

Feb 12, 2026   📅   10:00 AM   🕐

*Subject ←

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

Reason ←

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

Cancel   Submit

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

Status
Open

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

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.

Enrollment
Case Management - NSHOPP - CMA

Created By
Karyn Velez

Last Modified By
Karyn Velez

Cancel   Save

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
2/11/2026

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

Last Modified By
Karyn Velez

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