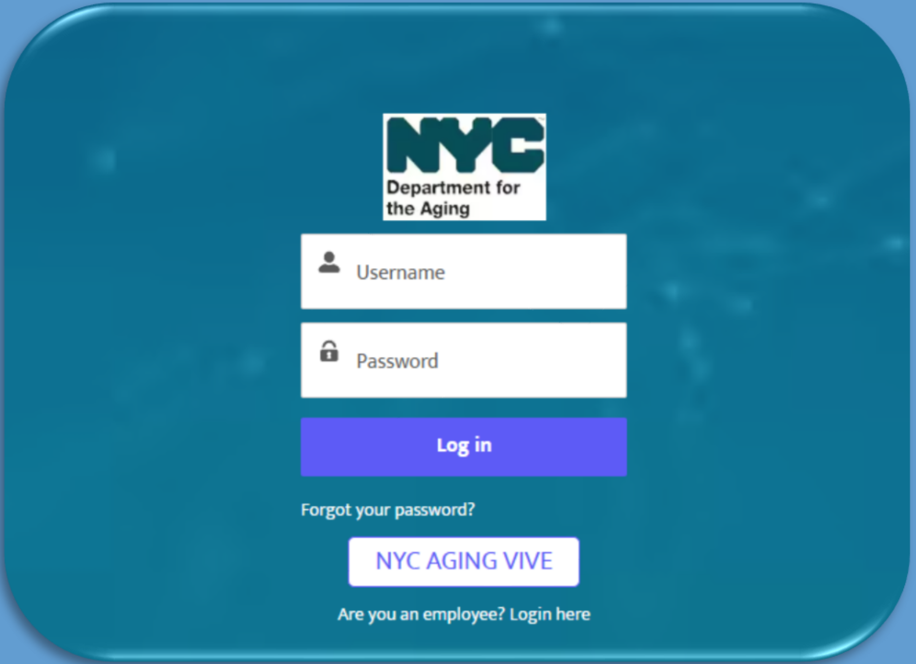
VIVÉ CMA LAB #3:
UNIT ENTRY & CASE NOTES



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

LOGGING UNIT ENTRIES:
UNIT OVERVIEW, CREATION & UPDATES

CLIENT UNIT REPORT –
PROGRAM STAFF:

MONTHLY UNIT SUMMARY –
ADMINISTRATORS:
CREATION, UPDATES & COMPLETION

FEATURES PURPOSE & FUNCTION

Unit Entry is where you record your events and services. This could be for services provided on an individual client level or at a group or event level.

You can enter units in VIVÉ in three places: **Details Menu**, **Enrollment Menu**, or **Program Tools**.

Case Notes detail interactions with clients and record important client information. They are an opportunity to provide a deeper understanding of your client and their situation.

Case Notes document what is happening with your client: what are the client's needs, how they are addressed, explanation and **record of services provided**, and if there are any outstanding issues.

Additionally, they are a **vehicle for supervision and oversight**.

Logging Unit Entries

Unit Entry Overview

*Date of Occurrence

Date action taken on behalf of the client – *Date of Occurrence can be backdated*

*Status

<u>All</u> units remain in *Draft* status until they are *Finalized* in **Monthly Unit Summary** (MUS)

*Service Type

Available Service Types:

- **Details level** – *CSMG – DFTA Funded*
- **Enrollment Level** – *CSMG – DFTA Funded, Non-DFTA Funded Service & Supplemental Services*

Unit Type

Unit Types are <u>defined</u> by Service Type and prepopulated.

- **CSMG** – *Hour*
- **Non-DFTA Funded** – *Contact*
- **Supplemental Services** - *Item*

Unit Entry Overview

Host Type

Various ways in which contact can be made with the client

*Funding Source

Two Types:
- *NYC Aging Funded*
- *Discretionary Funding*

*Time Spent

Amount of time spent assisting client – *Completion required when Service Type is CSMG*

*Total Units

Unit amount assigned to the task/action – *Completion required when Service Type is other than CSMG*

Service Comments

Supporting documentation for Unit Entry

Where to Log Units:

Details, Enrollment & Program Tools

Units are logged on the ***Details*** level when work, such as Information & Referral, has been conducted with a client (or caregiver), however, the person <u>does not wish to move forward with Enrollment</u> .

<u>NOTE:</u> The ability to select an associated *Case Notes* is not available on this level. The Unit Entry's *Comments* section is where documentation of the services provided can be recorded.

Units are logged on the ***Enrollment*** level are specific to work conducted with a client who is enrolled in your program.

The ability to select one or multiple *Case Note(s)* as supporting documentation of services provided is available on this level.

Units logged via ***Event Profile*** on ***Program Tools*** are "event" related, such as support groups led by a staff member. As a result, this function is <u>most often used by OACs and NORCS, and not typically by Case Management Programs</u>.

You can consult your Program Officer for further information <u>if your program wants to create an Event Profile for this purpose</u>.

Steps for Entering a Client Unit on the Enrollment Level

1. Select *Enrollment* Tab & *hyperlink*
2. Select *Case Notes* Tab & *Create* a Case Note
3. Select *Unit Entry* tab & *New* button
4. Complete all required & optional fields
5. Select *associated* Case Note(s)
6. Select Save to return to List View

Unit Entry

*Date of Occurrence

Nov 26, 2025

*Status

Draft

Enrollment

Case Management - NSHOPP - CMA

Client

Abbie G Client

*Service Type

Case Management - DFTA Funded

Host Type

Non-Direct Client Activity

*Funding Source

NYC Aging Funded Service

Unit Type

Hour

*Time Spent

30 min

*Total Units

0.50

Service Comments

Case Notes

	Subject	Note Type	Contact Name	Service Date	Status	Created Date	Created Name
☑	Initial Assessment - Care Plan	Care Plan	Abbie G Client	11/26/2025	Draft	11/26/2025	Karyn Velez
☐	EMS Dispatch Call	Other	Abbie G Client	01/02/2026	Draft	01/02/2026	Karyn Velez

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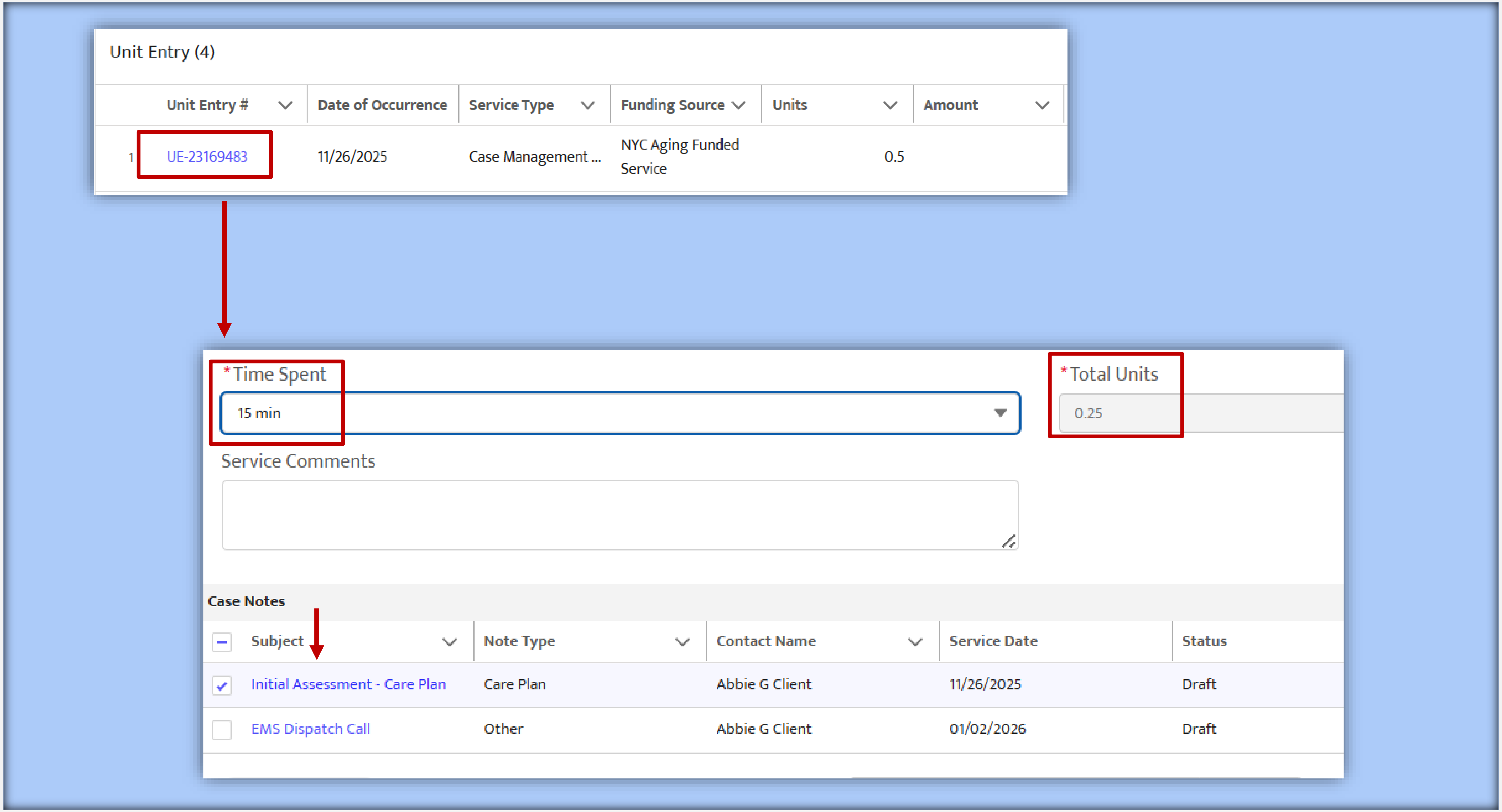
Total Records: 2

Cancel Save

Steps to Edit a Client Unit Entry

1. Select the *Unit Entry* Tab
2. Select the *hyperlink* for the desired Unit to Edit
3. Make all desired Edits
4. Select *Save* to return to the List View

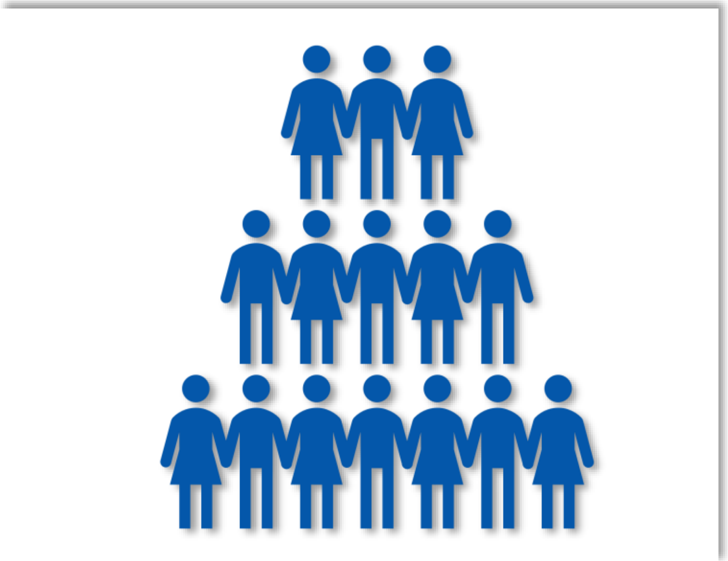

Unit Entry (4)
Unit Entry #
Date of Occurrence
Service Type
Funding Source
Units
Amount
1
UE-23169483
11/26/2025
Case Management ...
NYC Aging Funded Service
0.5
*Time Spent
15 min
*Total Units
0.25
Service Comments
Case Notes
Subject
Note Type
Contact Name
Service Date
Status
Initial Assessment - Care Plan
Care Plan
Abbie G Client
11/26/2025
Draft
EMS Dispatch Call
Other
Abbie G Client
01/02/2026
Draft

Voided Units

The process of ***voiding a unit*** is similar for all three pathways to unit entry. However, units can only be voided if they are in the draft status. <u>Once a Monthly Unit Summary is finalized units cannot be voided.</u>

At the bottom of each Unit Entry details page, is a ***Void Unit*** button. Select it and the unit is Voided.

NOTE: *Once a unit is voided it cannot be edited. Therefore, it cannot be un-voided. If you need that unit, a new one would need to be created.*



Client Unit Report for Program Staff

Client Units Report

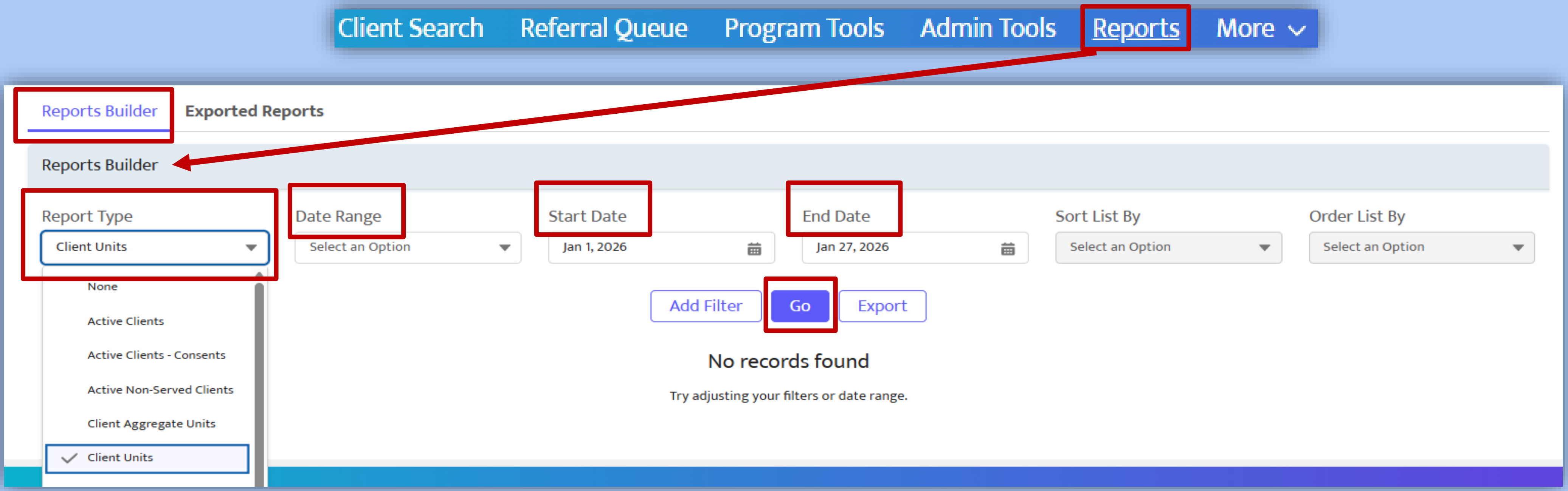
Client Units is a report type found on the ***Reports Builder*** screen page within the ***Reports*** link located on the ***Top Menu***.

Client Units provides a list of all clients who have received at least one unit of service from your program within a selected *Date Range* or a specific *Start* and *End Date*.

The ***Client Units*** report includes the following fields: *Client ID, First & Last Name, DOB, Home Address, Home & Cell Phone Numbers, Email, Service Date, Service Type, Unit Source, Funding Source, Units, Amount, Assigned Worker, Enrollment Date and Closing Date*.

Note: The fields in the report cannot be filtered.

The ***Client Units*** report can be ***Exported*** into Excel and downloaded for further sorting and/or printing.



Client Units Headers

Client Units								
Client ID	Last Name	First Name	DOB	Home Address	Home Phone	Cell Phone	Email	Service Date

Client Units								
Service Type	Unit Source	Funding Source	Author	Units	Amount	Assigned Worker	Enrollment Date	Closing Date

Steps for Creating Client Units Report

1. Select *Program Tools* Tab & *Reports* Tab
2. In *Reports Builder* screen, select *Client Unit* from *Report Type* drop down list
3. Input either a *Date Range* or a *Start Date and End Date*
4. Select *Add Filter button to open View Filters fields*
5. Select *Author* from *Select Field* drop down & *Contains* from *Select Condition* field drop down
6. Enter *Worker's first and/or last name* in the *Enter Value* field
7. *Select Go button to view Report*

Reports Builder | Exported Reports

Reports Builder

Report Type: Client Units

Date Range: Select an Option

Start Date: Jan 1, 2026

End Date: Jan 27, 2026

Sort List By: Select an Option

Order List By: Select an Option

View Filters

1. Select Field: Author | Select Condition: Contains | Enter Value: velez

Add Filter | Go | Export

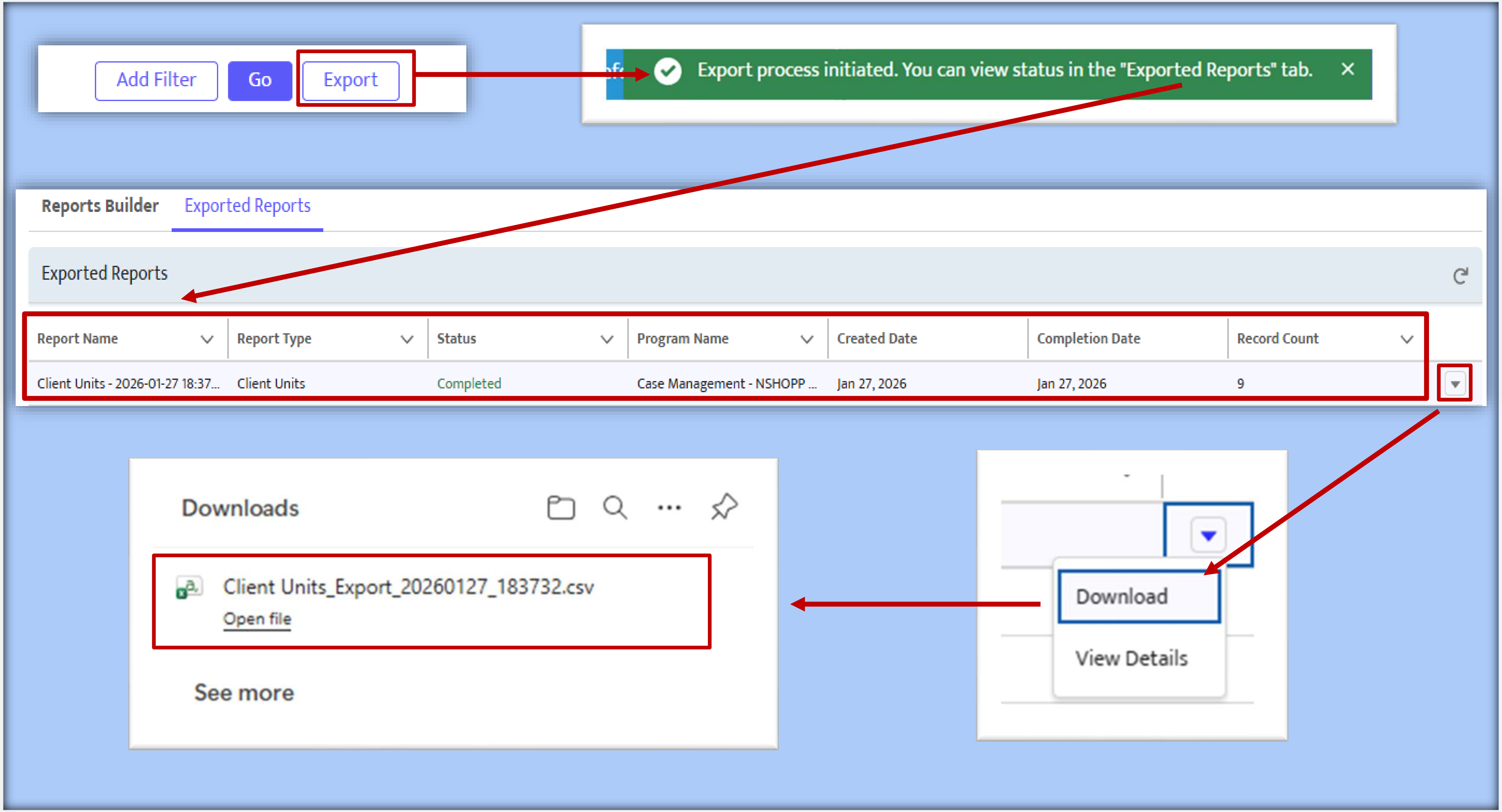
Client Units

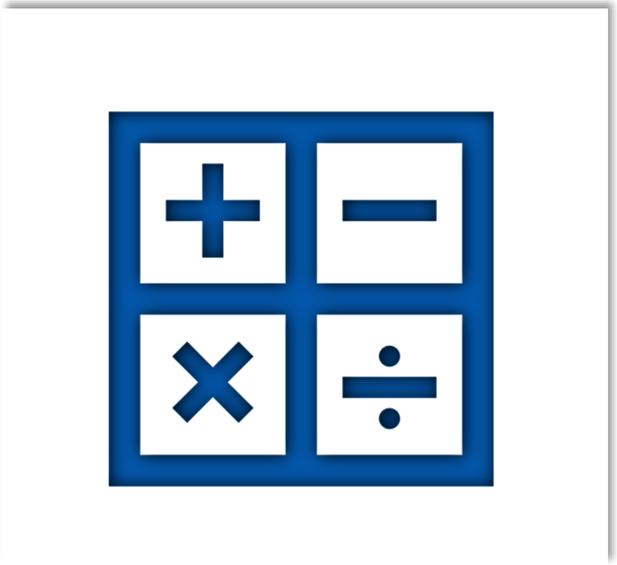
	Funding Source	Author	Units
	NYC Aging Funded Ser...	Karyn Velez	0.25
	NYC Aging Funded Ser...	Karyn Velez	2.25
	NYC Aging Funded Ser...	Karyn Velez	1
	NYC Aging Funded Ser...	Karyn Velez	0.25
	NYC Aging Funded Ser...	Karyn Velez	0.5
	NYC Aging Funded Ser...	Karyn Velez	1
	NYC Aging Funded Ser...	Karyn Velez	1
	NYC Aging Funded Ser...	Karyn Velez	1

Remember: If you want to see the total of your daily units, both the Start Date and End Date must be the same.

Steps for Exporting Client Units Report

1. On *Reports Builder* screen, Select *Export* button to export the report
2. Select *Exported Reports* link at top of screen page to view report on *Exported Report* List View
   - ***NOTE:*** If report is not listed in the List View, *select the Refresher Circle Arrow* to the far right to bring up report.
3. Select the *drop-down arrow* at the far right of the List View and select *Download*
4. Select the Download's *Open File* link to open report in Excel


Add Filter
Go
Export
Export process initiated. You can view status in the "Exported Reports" tab.
Reports Builder
Exported Reports
Exported Reports
Report Name
Report Type
Status
Program Name
Created Date
Completion Date
Record Count
Client Units - 2026-01-27 18:37...
Client Units
Completed
Case Management - NSHOPP ...
Jan 27, 2026
Jan 27, 2026
9
Downloads
Client Units_Export_20260127_183732.csv
Open file
See more
Download
View Details



Monthly Unit Summary (MUS) for Administrators

Monthly Unit Summary (MUS)

The ***Monthly Unit Summary*** reports the summary of units recorded in a month.

Once you have confirmed these amounts, then you must finalize the report. <u>Once a report is finalized, units can no longer be entered or edited</u>.

If you need to unlock a Monthly Unit Summary, contact your program officer.

Monthly Unit Summary reports that are in *Draft* status can be edited and units can continue to be entered.

A ***Monthly Unit Summary*** report can be created for <u>any month prior and up to the current month.</u>

Monthly Unit Summary reports <u>**cannot**</u> be created for future months.

Monthly Unit Summary: List View

Monthly Unit Summary (5)

New

Name	Month	Year	Created Date	Status
MUS-000144	December	2025	01/27/2026	Draft
MUS-000108	November	2025	11/07/2025	Draft
MUS-000051	October	2025	10/03/2025	Draft
MUS-000037	August	2025	09/26/2025	Final
MUS-000026	September	2025	09/23/2025	Final

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Total Records: 5

Steps for Entering a New Monthly Unit Summary

1. Select *Program Tools* Tab & *Monthly Unit Summary* Tab
2. Select *New* button
3. Select desired *Month* and *Year*
4. Select *Calculate Units* button
5. Select *right facing arrow* next to desired *Service Types* to open screen page and review associated Units
6. Select *Save* to return to List View

Monthly Unit Summary

*Program: Case Management - NSHOPP - CMA

*Status: Draft

*Month: January

*Year: 2026

Total Cost Center Amount

Calculate Units

2. Case Management

Cost Amount: $0.00

Service Types

Case Management - DFTA Funded — Total Units: 4 — Total Amount: $ 0

Unit Entry #	Date of Occurrence	Service Type	Source	Status	Created Date	Units	Amount $
UE-23169478	01/22/2026	Case Management - DFT...	Enrollment	Draft	01/22/2026	2.25	
UE-23169476	01/20/2026	Case Management - DFT...	Enrollment	Draft	01/22/2026	0.5	
UE-23169477	01/20/2026	Case Management - DFT...	Enrollment	Draft	01/22/2026	0.25	
UE-23169467	01/07/2026	Case Management - DFT...	Enrollment	Draft	01/22/2026	1	

Cancel Save Finalize

Remember: Be sure all units are accounted for before selecting

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