



VIVÉ CMA LAB #5:
Consents & Under 60 HDM Clients

Thanks for Joining!

Goal of VIVÉ “Labs”

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

**Definitions
Navigation
Functionality**

VIVÉ: CMA Lab

CONSENTS:

1. *Quick Overview*
2. *Creating Various Consent Types*
3. *Uploading Documentation*
4. *Inactivating Document Upload*
5. *Revoking Consent Record*

UNDER 6o HDM CLIENT:

1. *Enrollment*
2. *"Association" with Primary Client*





Consents:

Quick Overview

Quick Overview:
When are "Verbal" Consents Created?

- ***Consent to Collect Data*** is created automatically by VIVÉ once the Client provides initial basic information (i.e., First & Last Name, Date of Birth and Address), at the time of Intake.
- ***Consent to Refer/Share*** is created by the User either through the *Consents* tab or by selecting the *Create Consent to Refer/Share* button when creating a new service plan.

Quick Overview: *How are "Signed" Consents Created?*

- Once Consent Documentation is added under the Consents tab, the consent record will be updated from "Verbal" to "Signed."
- Documentation for either Consent type – *Consent to Collect Data* or *Consent to Refer/Share* is requested to be uploaded within 30 days of the consent's creation date.

NOTE: Consent documentation located in the Documents tab will not update either Consent Type – Consent to Collect Data or Consent to Refer/Share – from "Verbal" to "Signed."

Consents Tab List View

Consents (4)

 [New](#)

Number	Consent Status	Consent Type	External Agency	Other External Agency
1 Consent-234691	Active	Consent To Refer		SNAP
2 Consent-234299	Active	Consent To Refer		
3 Consent-231526	Revoke	Consent To Refer		
4 Consent-231525	Active	Consent To Collect Data		

Showing 1 of 1 Page(s)

[« First](#) [< Previous](#) [Next >](#) [Last »](#)

Total Records: 4



Consents:

Creating Various Consents

Steps for Creating “Verbal” Consent: Consent to Collect Data

1. Select *Client Search*, confirm client is “new” and select *New Client* button to generate the *New Contact: Client* pop-up window.
2. Complete all required fields on *New Contact: Client* pop-up window (i.e., *First Name*, *Last Name*, *DOB*, *Home Address*).
3. Select *Save*. Client file will open on the *Client Details* level. *Consent to Collect Data* record will be listed in *Consents* tab.





Consent
Consent-230574

Client

Alistar Cook

Consent Status

Active

Program

Case Management - NSHOPP - CMA

Is Global Consent?



**Only for
OACs**

Consent Type

Consent To Collect Data

Verbal Consent



Signed Consent



Edit

Top Portion of Consent Screen Page

Consent Status

Active

--None--

✓ Active

Revoke

Verbal Cons



Signed Con



Cancel

Save

Bottom Portion of Consent Screen Page

 Consent History (1)

Date	Field	User	Original Value	New Value
9/23/2025, 7:38 PM	Created.	Karyn Velez		

[View All](#)

Documents (0)



[Add Document](#)

Document Type ▾

Document Title ▾

Access Level ▾

Uploaded By ▾

Status ▾

Uploaded Date ▾

Description ▾

Program Name ▾

[Exit](#)

Steps for Creating “Verbal” Consent: Consent to Refer/Share – NYC Aging Services

1. Go to *Consents Tab* on *Client Details* level.
2. Select *New Button* to generate *New Consent* pop-up window.
3. Select *Consent Refer* from *Consent Type* dropdown.
4. Select desired NYC Aging Service from *Referral Program* dropdown.
5. Select *Save* and return to *Consents List View*.



New Consent

Client

 Adina A Client

* Consent Type

Consent To Refer ▼

Consent Status

Active ▼

Verbal Consent ←

Program

 Case Management - NSHOPP - CMA

* Referral Program

Home Care - PERSONAL TOUCH - Bronx ▼

Is this referral for an External Agency?

Cancel

Save

Top Portion of Consent Screen Page



Consent
Consent-234693

Client

Adina A Client

Consent Status

Active

Program

Case Management - NSHOPP - CMA

Referral Program

Home Care - PERSONAL TOUCH - Bronx

Is Global Consent?



Consent Type

Consent To Refer

Verbal Consent



Signed Consent



Edit

Bottom Portion of Consent Screen Page

 Consent History (1)

Date	Field	User	Original Value	New Value
3/4/2026, 10:55 PM	Created.	Karyn Velez		

[View All](#)

Documents (0)  [Add Document](#)

Document Type	Document Title	Access Level	Uploaded By	Status	Uploaded Date	Description	Program Name
---------------	----------------	--------------	-------------	--------	---------------	-------------	--------------

[Exit](#)

Steps for Creating "Verbal" Consent: Consent to Refer/Share - "Other Services"

1. Go to *Consents Tab* on *Client Details* level.
2. Select *New* to generate *New Consent* pop-up window.
3. Select *Consent Refer* from *Consent Type* dropdown.
4. Select *External Agency* checkbox to access *Other Agency* checkbox.
5. Select *Other Agency* checkbox and add desired agency name to *Other Agency* field.
6. Select *Save* and return to *Consents List View*.



New Consent

Client: Adina A Client

* Consent Type: Consent To Refer

Consent Status: Active

Verbal Consent

Program: Case Management - NSHOPP - CMA

Select External Agency

Is this referral for an External Agency?

Is Other Agency?

Cancel Save

New Consent

Client: Adina A Client

* Consent Type: Consent To Refer

Consent Status: Active

Verbal Consent

Program: Case Management - NSHOPP - CMA

* Other External Agency: SCRIE

Is this referral for an External Agency?

Is Other Agency?

Cancel Save

Top Portion of Consent Screen Page



Consent
Consent-234694

Client

Adina A Client

Consent Status

Active

Program

Case Management - NSHOPP - CMA

Is Other Agency?

✓

Is Global Consent?

○

Consent Type

Consent To Refer

Verbal Consent

✓

Signed Consent

○

Other External Agency

SCRIE

Edit

Bottom Portion of Consent Screen Page

 Consent History (1)

Date	Field	User	Original Value	New Value
3/4/2026, 10:55 PM	Created.	Karyn Velez		

[View All](#)

Documents (0)  [Add Document](#)

Document Type	Document Title	Access Level	Uploaded By	Status	Uploaded Date	Description	Program Name
---------------	----------------	--------------	-------------	--------	---------------	-------------	--------------

[Exit](#)

Steps for Creating “Verbal” Consent: Service Plans – MDP, HC & FV

1. Go to *Enrollments* tab & Select *Enrollment* hyperlink.
2. Create *Service Plan*, select *Save* & return to *List View*.
3. Select *hyperlink* associated with desired draft *Service Plan*.
4. Select *Create Referral* button to generate *Client Referral Form*.
5. Select *Save* – “Error Message” will appear.
6. Select *Create Consent to Refer* button that is now at the bottom of the *Client Referral Form*.
7. Select *Verbal Consent* checkbox & hit *Save*.
8. Select *Save* again to return to *Service Plan* screen.



Creating Consent to Refer/Share from Service Plan

Please create Consent as Consent to refer is not created

Client Referral Form

Jan 23, 2020

Source Program
 Case Management - NSHOPP - CMA

Target Program
 Home Delivered Meals - Great Perform:

Comments
Enter Comments

***Meal Delivery Plan**
MDP-42831 (Draft)

***Service Requested**

Available Services
Special Meal Box
6th Meal

Selected Services
Weekday

***Consent Type**
Consent To Refer

Verbal Consent

Referral Program
 Home Delivered Meals - Great Performa



Consents:

Uploading Documentation

Creating “Signed” Consent: Uploading Documentation

1. Go to *Consents* tab on *Client Details* level & Select *hyperlink* for desired *Consent Type*.
2. Scroll to bottom of screen page and select *Add Document* button .
3. On *Add Document* pop-up window, enter information into all required fields.
4. Select *Upload File*, select *Save* & select *Done* once file is uploaded.
5. Select *Save* once more to exit pop-up window and return to *Consent* screen page.



Consents (6)

Number	Consent Status	Consent Type	External Agency	Other External Agency
1 Consent-234694	Active	Consent To Refer		SCRIE
2 Consent-234693	Active	Consent To Refer		
3 Consent-234691	Active	Consent To Refer		SNAP
4 Consent-234299	Active	Consent To Refer		
5 Consent-231526	Revoke	Consent To Refer		
6 Consent-231525	Active	Consent To Collect Data		



NEW FORM

[View All](#)

[Add Document](#)

Description Program Name

Add Document

* Document Type
[Consent to Refer/Share Data](#)

* Access Level
[Program Level](#)

* Document Title
[Consent to Refer - HC](#)

Status
[Active](#)

Description
Consent for Home Personal Care request

Upload Document
[Upload Files](#) Or drop files

Uploaded File:
Consent to Refer & Share - Homecare.pdf

[Cancel](#) [Save](#)

Bottom Portion of Consent Screen Page

 Consent History (3)

Date	Field	User	Original Value	New Value	
3/4/2026, 11:36 PM	Verbal Consent	Karyn Velez	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
3/4/2026, 11:36 PM	Signed Consent	Karyn Velez	<input type="checkbox"/>	<input checked="" type="checkbox"/>	▼
3/4/2026, 10:55 PM	Created.	Karyn Velez			▼

[View All](#)

Documents (1)  [Add Document](#)

	Document Type	Document Title	Access Level	Uploaded By	Status	Uploaded Date	Description	Program Name	
1	Consent to Refer/Share ...	Consent to Refer - HC.pdf	Program Level	Karyn Velez	Active	Mar 4, 2026	Consent for Home Pers...	Case Management - NS...	▼

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

[Exit](#)

Top Portion of Consent Screen Page



Consent
Consent-234693

Client

Adina A Client

Consent Status

Active

Program

Case Management - NSHOPP - CMA

Referral Program

Home Care - PERSONAL TOUCH - Bronx

Is Global Consent?



Consent Type
Consent To Refer

Verbal Consent



Signed Consent



Edit



Consents:

Inactivating Document Upload

Steps for Inactivating Documents: Erroneous Consent Document Upload

1. Go to *Consents* tab on *Client Details* level.
2. Select *Number hyperlink* for desired *Consent* record.
3. Scroll down to *Documents List View*.
4. Select *drop down arrow* to far right of *Consent Document* that was erroneously uploaded.
5. Choose *Edit*, select *Inactive* on *Edit Document* pop-up window & select *Save*.
6. *Document* status changes from "Active" to "Inactive."



Inactivating Erroneous Consent Document Upload

Documents (1) ↻ [Add Document](#)

	Document T... ▾	Document Ti... ▾	Access Level ▾	Uploaded By ▾	Status ▾	Uploaded Da... ▾	Description ▾	Program Na... ▾	
1	Consent to Refer/Share Data	Consent to Refer - HDM.pdf	Program Level	Karyn Velez	Active	Jan 25, 2026		Case Management - NSHOPP - CMA	▾

Edit Document Status

Status

Inactive ▾

[Cancel](#) [Save](#)

[Edit Status](#)

[Download](#)



Consents:

Revoking Consent Record

Revoking Consent Record

1. Go to *Consents* tab on *Client Details* level.
2. Select *Number hyperlink* for desired *Consent* record.
3. Select *Edit* button at top of screen & choose "Revoke" from the *Consent Status* drop down.
4. Select *checkbox*, "Consent to Revoke received from client?", add a date to field *Date Consent to Revoke Received?* and select *Save*.
5. Select *Exit* to return to the *Consents List View* – *Consent Status* changes from "Active" to "Revoke."



Revoking Consent Record

Consents (5)

	Number	Consent Status	Consent Type
1	Consent-234619	Active	Consent To Refer
2	Consent-233909	Active	Consent To Refer
3	Consent-233908	Active	Consent To Refer

 Consent
Consent-234619

Client
[Abbie G Client](#)

Consent Status
Active

Program
Case Management - NSHOPP - CMA

Is Other Agency?
✓

Is Global Consent?
○

Consent Type
Consent To Refer

Verbal Consent
○

Signed Consent
✓

Other External Agency
snap

[Edit](#)

Revoking Consent Record

 Consent
Consent-234619

Client

Abbie G Client

Consent Status

Revoke

Program

Case Management - NSHOPP - CMA

Consent to Revoke received from client?



Is Other Agency?



Is Global Consent?



Consent Type

Consent To Refer

Verbal Consent



Signed Consent



*Date Consent to Revoke Received?

Mar 5, 2026



Other External Agency

snap

Cancel

Save

Top Portion of Consent Screen Page



Consent
Consent-234619

Client

Abbie G Client

Consent Status

Revoke

Program

Case Management - NSHOPP - CMA

Consent to Revoke received from client?



Is Other Agency?



Is Global Consent?



Consent Type

Consent To Refer

Verbal Consent



Signed Consent



Date Consent to Revoke Received?

3/5/2026

Other External Agency

snap

Edit

Bottom Portion of Consent Screen Page

Consent History (6)

Date	Field	User	Original Value	New Value	
3/5/2026, 2:57 PM	Consent Status	Karyn Velez	Active	Revoke	▼
3/5/2026, 2:57 PM	Date Consent to Revoke Received?	Karyn Velez		3/5/2026	▼
3/5/2026, 2:57 PM	Consent to Revoke received from client?	Karyn Velez	<input type="checkbox"/>	<input checked="" type="checkbox"/>	▼
3/5/2026, 2:47 PM	Verbal Consent	Karyn Velez	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
3/5/2026, 2:47 PM	Signed Consent	Karyn Velez	<input type="checkbox"/>	<input checked="" type="checkbox"/>	▼
2/13/2026, 4:08 PM	Created.	Karyn Velez			▼

[View All](#)

Documents (1)

[Add Document](#)

	Document Type	Document Title	Access Level	Uploaded By	Status	Uploaded Date	Description	Program Name	
1	Consent to Refer/Share ...	Consent to Refer - SNAP...	Program Level	Karyn Velez	Active	Mar 5, 2026		Case Management - NS...	▼

Showing 1 of 1 Page(s)

« First < Previous Next > Last »

Total Records: 1

[Exit](#)

Important Reminders

1. Be sure to upload documentation for both *Consent to Collect Data* and *Consent Refer/Share* within the *Consents* tab.
2. If no documents have been uploaded to *Consents* tab for an existing client – either *Consent to Collect Data* and/or *Consent Refer Share* – document(s) can be added at the time of the next Reassessment.
3. Every service listed on the signed *Consent Refer/Share* document, must have *Consent Refer/Share* record created and a copy of the signed *Consent Refer/Share* document must be uploaded to the record.
4. You do not need to select “Revoke Consent” when you close a case record **UNLESS** the client specifically asks to Revoke Consent. Otherwise, consent remains even after a case closes.





Under 60 HDM Client: *Enrollment*

Steps to Enroll an Under 60 HDM Client

1. Select *Client Search*, confirm client is “new” and select *New Client* button to generate the *New Contact: Client* pop-up window.
2. Complete all required fields on *New Contact: Client* pop-up window (i.e., *First Name, Last Name, DOB, Home Address*).
3. Select *Save*. Client file will open on the *Client Details* level. *Consent to Collect Data* record will be listed in *Consents* tab.
4. Go to *Enrollment* tab and select *New* button.
5. Complete all required fields on *Create Enrollment* pop-window and select *Save*. **An error message will display, and the *Override Validations* checkbox will appear on the pop-up window.**
6. Check the *Override Validations* checkbox and select, “Needs services urgently” from the *Override Reason* drop-down field.
7. Select *Save*. *Enrollment* will appear on the *Enrollments List View*.



Under 60 HDM Client: Enrollment of Tyler Client

*** Contact Type**

Client Contact Professional

First Name

Tyler



To enable the 'New Client' button, confirm that no matching result was found.

Yes, I have reviewed the results and confirm there is no match

New Client



New Contact: Client

Consent

Have you received consent to collect data from the client?

Verbal Consent Program

Client Information

*First Name *Last Name

*Date of Birth

Email

Under 60 HDM Client: Enrollment of Tyler Client

Create Enrollment

*Program

Case Management - NSHOPP - CMA

*Contact

Tyler Client

*Enrollment Date ⓘ

Feb 3, 2026

Cancel

Save

⊘ This client does not meet the age criteria of 60 for enrollment, If you still wish to continue select 'Override Validations'.

Create Enrollment

*Program

Case Management - NSHOPP - CMA

*Contact

Tyler Client

*Enrollment Date ⓘ

Feb 3, 2026

Override Validations

*Override Reason

Needs services urgently

Cancel

Save



Under 60 HDM Client:
Association with Primary Client

Steps to “Associate” an Under 60 HDM Client with the Primary Client

1. Go to Under 60 HDM Client *Enrollments* tab and select *Enrollment Name* hyperlink.
2. Select *Contacts* tab and *New* button.
3. Select radio button, *Client*, as *Contact Type* and search for Primary Client.
4. Select radio button associated with Primary Client’s name, then select *Confirm Selection* button at bottom left of screen.
5. Complete all required fields on *New Contact Relationship* pop-window and select *Save*.
6. *Contact Relationship* will now appear on *List View* for Under 60 HDM Client. In addition, on Primary Client’s *Contact Relationship List View*, Under 60 HDM Client’s name will be listed.



Associating Tyler Client (Under 60 HDM Client) & Annie Client (Primary Client)

Enrollment
Case Management - NSHOPP - CMA

Contact
Tyler Client

Assigned To
Karyn Velez

Contacts **More** ▾

New

*** Contact Type**

Client Contact Professional

First Name
Annie

Client ID

Search by address?

Search

<input checked="" type="radio"/>	2000002634	Annie Client	Client
----------------------------------	------------	--------------	--------

Confirm Selection

Associating Tyler Client (Under 60 HDM Client) & Annie Client (Primary Client)

New Contact Relationship

*Client Name

Tyler Client

Related Contact

Annie Client

[Search Contact](#)

Contact Relationship to Client

*What is Contact relationship to Client?

Aunt

Contact Type

Informal support

Care support type

Not Applicable

This contact

Has extra key to client's home

Emergency Contact

Primary

*Status

Active

Client Relationship to Contact

*What is Client relationship to Contact?

Niece

Contact Type

--None--

Care support type

Not Applicable

This contact

Has extra key to client's home

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
- Wait List, IADL/ADLs & Reassessment
- Meal Delivery Plan: On Holds, Resumptions & Service Changes
- Reassessments & the Assessment Form: CAGE, Assistive Devices, Medical Information & Others

