

The image shows a login interface for the NYC Department for the Aging. It features a dark teal background with rounded corners. At the top center is the NYC Department for the Aging logo. Below the logo are two white input fields: the first is labeled 'Username' with a person icon, and the second is labeled 'Password' with a lock icon. A purple 'Log in' button is positioned below the password field. Underneath the button is a link for 'Forgot your password?'. At the bottom of the interface is a white button labeled 'NYC AGING VIVE' and a link that says 'Are you an employee? Login here'.



## VIVÉ CMA LAB #6: Waitlist, IADL/ADLs & Reassessment

## Goal of VIVÉ “Labs”

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

**Definitions  
Navigation  
Functionality**

# VIVÉ: CMA Lab

## WAITLIST:

1. *Overview & "Weight Categories"*



## WAITLIST PRIORITIZATION:

1. *Assessment*
2. *Home delivered Meals*



## WAITLIST PRIORITIZATION:

1. *Home Care*
2. *Additional Hours for Home Care*



## WAITLIST, REASSESSMENT & IADL/ADLs



## FINAL QUESTIONS & ANSWERS





## **Waitlist:**


*Overview & "Weight Categories"*

## Overview & “Weight Categories”

- The ***Waitlist*** tab provides you with the ability to place a client on the waiting list for ***Case Management (Assessment), Home Delivered Meals, Home Care*** and ***Additional Hours for Home Care***.

Access to waitlists can be found either on *Enrollment Details* under the ***Waitlist*** tab or in *Program Tools* under the ***CMA Waitlist*** tab.

## Enrollment Details: Waitlist Tab

 Enrollment  
Case Management - NSHOPP - CMA

Contact [Abbie G Client](#) Assigned To  
Karyn Velez

Enrollment Details Forms Assessments **Waitlist** Cost Share Plan

## Program Tools: CMA Waitlist Tab

Referral Queue **[Program Tools](#)** Admin Tools

Logged in user is **Karyn Velez** and working in Case

**[CMA Waitlist](#)** Survey Invitation Links Client N

## Overview & “Weight Categories”

- The service the client is waiting for is selected from the ***Waitlist Prioritization Level*** drop-down menu on the ***Client Waitlist*** pop-up window. On the ***Waitlist tab***, the ***Client Waitlist*** window requires a ***Start Date*** and the selection of a ***Waitlist Prioritization Level***. On the ***CMA Waitlist tab***, this window has one additional required field, ***Contact***.  
  
On both ***Client Waitlist*** windows, the ***Waitlist Status*** defaults to “***Open***” and if needed an ***End Date*** can be entered.

***Remember: There should only be one Waitlist for each Service Type.***

## Waitlist Tab: *Client Waitlist Window*

**Client Waitlist**

**Note:** If the Prioritization Level is set to *Home Care* or *Additional Hours for Home Care*, the system will use the score from the most recent completed CMA assessment, determined by the assessment's start date.

\* Start Date: Mar 23, 2026

End Date: [Empty]

\* Waitlist Prioritization Level for: Home Care

Waitlist Status: Open

Cancel Save

## CMA Waitlist Tab: *Client Waitlist Window*

**Client Waitlist**

**Note:** If the Prioritization Level is set to *Home Care* or *Additional Hours for Home Care*, the system will use the score from the most recent completed CMA assessment, determined by the assessment's start date.

\* Contact: Abbie G Client

\* Start Date: Mar 23, 2026

\* Waitlist Prioritization Level for: Home Care

Waitlist Status: Open

End Date: [Empty]

Cancel Save

## Overview & “Weight Categories”

- The ***Waitlist*** form opens with specific *pre-populated data* drawn from various sections in VIVÉ. This data determines the waitlist’s ***Total Weight*** score.  
For ***Case Management*** (Assessment) data is pulled from sections on the *Intake* and *Emergency Preparedness*.  
For ***Home Delivered Meals*** data is pulled from sections on the *Intake* and *NSI*.  
For ***Home Care*** and ***Additional Hours for Home Care***, data is pulled from the most recent *Assessment* with a status of “*Completed*” and *Emergency Preparedness*.

# WAITLIST: "WEIGHT CATEGORIES"

## "Case Management" (Assessment)

1. **Unmet IADLs/ADLs**
2. **Health/Mental Health Indicators**
  - *Discharged from the hospital within the last 14 days*
3. **Emergency preparedness**
  - *Oxygen Dependent, Insulin Dependent, Respirator, Dialysis, Wheelchair dependent*

## "Home Delivered Meals"

1. **Unmet IADLS**
  - *Shopping, Prepare & Cook Meals, Use Transportation*
2. **Unmet ADLs**
  - *Mobility*
3. **Informal and Formal Supports**
  - *No informal or formal supports, Informal supports are overwhelmed, Formal supports will end soon, Informal or formal supports are inadequate, Informal supports are temporarily unavailable, Client's spouse/domestic partner, caregiver, child other family/household member died in last 12 months*
4. **Health/Mental Health Indicators**
  - *Discharged from the hospital within the last 14 days*
5. **NSI**
  - *Has tooth or mouth problems that make it hard to eat*
  - *Without wanting to lost or gained 10 more pounds in the last 6 months*

# WAITLIST: "WEIGHT CATEGORIES"

## "Home Care" & "Additional Hours for Home Care"

1. **Unmet IADLs/ADLs**
2. **Informal and Formal Supports**
  - *Does the person have family, friends and/or neighbors who help or could help with care?, Is the Informal support received*
3. **NSI**
  - *Without wanting to lost or gained 10 more pounds in the last 6 months*
4. **Assistive Devices**
  - *Wheelchair dependent, Walker*
5. **Emergency Preparedness**
  - *Respirator*

# Top Portion of Waitlist Form


 Waitlist  
WL-33928

[Edit](#) [Re-calculate](#)




## Client Waitlist


Start Date

Jan 2, 2026 

End Date




Waitlist Prioritization Level for

Home Care 

Total Weight

12

Waitlist Status

Open 

## IADLS

- Unmet Need: Shopping
- Unmet Need: Laundry
- Unmet Need: Prepare & Cook Meals

- Unmet Need: Use Transportation
- Unmet Need: Housework/cleaning

## ADLS

- Unmet Need: Bathing
- Unmet Need: Transferring
- Unmet Need: Personal Hygiene
- Unmet Need: Eating

- Unmet Need: Mobility
- Unmet Need: Dressing
- Unmet Need: Toileting

# Bottom Portion of Waitlist Form

## Informal and Formal Supports

- Does the person have family, friends and/or neighbors who help or could help with care? = No  Is the informal support received

## NSI

- Without wanting to lost or gained 10 more pounds in the last 6 months

## Assistive Devices

- Wheelchair dependent  Walker

## Emergency preparedness

- Respirator

Age

84

# of months on the WL

2

Exit




## Overview & “Weight Categories”

- To update the ***Start Date, End Date, Waitlist Prioritization Level*** and/or the ***Waitlist Status***, on the ***Waitlist*** form choose the ***Edit*** button and update the desired fields on the ***Edit Waitlist*** pop-up window.

**Note:** if an ***End Date*** is entered, the ***Waitlist Status*** will automatically update to “**Closed.**”

## Waitlist Form:

*Editing Start Date, End Date, Waitlist Prioritization Level and/or Waitlist Status*

 Waitlist  
WL-33927

[Edit](#)

[Re-calculate](#)

### Client Waitlist

Start Date



Mar 10, 2026



End Date



Waitlist Prioritization Level for



Home Delivered Meals



Total Weight

9

Waitlist Status



Open



## Overview & “Weight Categories”

- To update the **Total Weight** score, the pre-populated data associated with each weight category must be edited within their own section in VIVÉ.  
**Note:** These fields are not editable on the **Waitlist** form.  
Once the data is edited, access the form, and choose the **Recalculate** button. The **Total Weight** field will then update.

# Waitlist Form: *Editing "Total Weight"*

## Original "Total Weight" Score

[Edit](#) [Re-calculate](#)

End Date

Total Weight

9

Use Transportation

## Updated "Total Weight" Score

[Edit](#) [Re-calculate](#)

End Date

Total Weight

10

Use Transportation



# Waitlist Prioritization:

*Case Management (Assessment)  
& Home Delivered Meals*

## WAITLIST PRIORITIZATION: Case Management: Service Type Usage

When would you select *Service Type, Case Management*?

1. Client has ***never received any NYC-Aging funded case management from your agency before*** and an Assessment cannot be completed within the 10-day Assessment timeframe.  
*Intake and Emergency Preparedness are completed. Intake is approved by the Supervisor, and Enrollment Status is changed from In Review to Active.*  
Client is placed on Waitlist.
2. Client has ***received NYC-Aging funded case management from your agency before, but their case was closed 2 years ago***, and an Assessment cannot be completed within the 10-day Assessment timeframe.  
***New*** *Intake and Emergency Preparedness are completed. Intake is approved by Supervisor, and Enrollment Status is changed from In Review to Active.*  
Client is placed on Waitlist.



## **Waitlist Prioritization: Case Management: Case Examples**

### **Service Type Usage #1: Case Example**

- *Mrs. Elaine Jones is a new client who is interested in receiving case management services and applying for home care services. Unfortunately, an assessment cannot be conducted for another 3 weeks because agency is at capacity and cannot yet assign a case manager to her.*

### **Service Type Usage #2: Case Example**

- *Mr. Paul Lee was a client from 2023 – 2024 and received HSCH and friendly visiting services. His case was closed with your program when he moved out of state. He has moved back to the community and is interested in receiving these services again. Unfortunately, an assessment cannot be conducted for another 4 weeks because the agency is at capacity and cannot yet assign a case manager to him.*

## WAITLIST PRIORITIZATION: Home Delivered Meals: Service Type Usage

When would you select *Service Type, Home Delivered Meals*?

1. Client has ***never received any NYC-Aging funded service from your agency before***. They are requesting home delivered meals, but meal program is at capacity.

*Intake* and *NSI* are completed. *Intake* is approved by the Supervisor, and Enrollment Status is changed from *In Review* to *Active*.

Client is placed on Waitlist.

2. Client has ***received NYC-Aging funded services from your agency before, but their case was closed 2 years ago***. They are requesting home delivered meals, but meal program is at capacity.

**New** *Intake* and *NSI* are completed. *Intake* is approved by the Supervisor, and Enrollment Status is changed from *In Review* to *Active*.

Client is placed on Wait List.



## WAITLIST PRIORITIZATION: Home Delivered Meals: Service Type Usage

When would you select *Service Type, Home Delivered Meals*?

3. Client ***is in receipt of housekeeping and friendly visiting services***. They are now requesting home delivered meals as well, however the meal program is at capacity.  
*Intake* and *NSI* are reviewed and updated, if needed.  
Client is placed on Waitlist.



## Waitlist Prioritization: *Home Delivered Meals: Case Examples*

### **Service Type Usage #1: Case Example**

- *Ms. Agnes Moorehead is a new client who is interested in receiving HDM. Unfortunately, no meals are currently available because the meal program is at capacity.*

### **Service Type Usage #2: Case Example**

- *Mr. Peter Lorre was a client from 2019 – 2022 and received HDM and friendly visiting services. His case was closed with your program when he moved out of state. He recently moved back to the community and is interested in receiving all these services again. Unfortunately, no meals are currently available because the meal program is at capacity.*

### **Service Type Usage #3: Case Example**

- *Ms. Tallulah Bankhead is a current client who receives HSCH once weekly for 4 hours. She now also interested in receiving HDM. Unfortunately, no meals are currently available because the meal program is at capacity.*



# **Waitlist Prioritization:** *Home Care & Additional Home Care Hours*

## WAITLIST PRIORITIZATION: Home Care: Service Type Usage

When would you select *Service Type, Home Care*?

1. Client has ***never received any NYC-Aging funded home care services before.***  
Client is authorized for home care service, ***but*** the Home Care Agency ***cannot provide the number of hours the client is requesting.***  
*Assessment and Emergency Preparedness* are completed. ***Assessment Status*** is marked "***Completed***" by Supervisor.  
Client is placed on the Waitlist.



## WAITLIST PRIORITIZATION: Home Care: Service Type Usage

When would you select *Service Type, Home Care*?

2. Client ***was in receipt of HMPC services two years ago, but service was terminated.*** Client continues to receive other NYC-Aging funded services including home delivered meals.

Client is being reassessed. Client is ***now in need of home care service again.***

Client is authorized for home care service, but the Home Care Agency ***cannot provide the hours the client is requesting.***

*Reassessment and Emergency Preparedness* are completed. ***Assessment Status*** is marked "Completed" by Supervisor.

Client is placed on the Wait List.



**Waitlist Prioritization:**  
***Home Care: Case Examples***

**Service Type Usage #1: Case Example**

- *Mr. Boris Karloff is a new client who was recently assessed. He is requesting 8 hours of HMPC weekly and HDM.*

*The HDM has begun, but the home care vendor has no home care hours available.*

**Service Type Usage #2: Case Example**

- *Mr. Lynd was receiving 4 hours of HSCH weekly and home delivered meals in 2023. His health improved in 2024, and he requested that the home care services be terminated, but that his HDM continue.*

*He has been reassessed and now is requesting not only HDM, but that the HSCH services begin again, this time for 8 hours weekly. Unfortunately, the home care vendor has no home care hours available.*

## WAITLIST PRIORITIZATION: Additional Home Care Hours: Service Type Usage

When would you select *Service Type, Additional Home Care Hours*?

1. Client is being reassessed. Client's current NYC-Aging funded *home care service type will remain unchanged*.

However, the client *does need additional hours, but the home care agency does not yet have enough hours to provide them*.

*Reassessment and Emergency Preparedness* are completed. **Assessment Status** is marked "Completed" by Supervisor.

In addition to sending the Home Care Service Plan *Reauthorization* referral, you *must also put the client on the Waitlist for those additional hours*.



## WAITLIST PRIORITIZATION: Additional Home Care Hours: Service Type Usage

When would you select *Service Type, Additional Home Care Hours*?

2. Client is being reassessed. The *client needs additional hours, and the home care Service Type needs to be changed* as well.

The Home Care Agency *does not yet have enough hours to provide them*. However, the Agency *can change the Service Type*.

*Reassessment and Emergency Preparedness* are completed. **Assessment Status** is marked "Completed" by Supervisor.

In addition to sending the Home Care Service Plan *Reauthorization* referral with the new home care service type, you *must also put the client on the Waitlist for those additional hours*.



**Waitlist Prioritization:**  
***Additional Home Care Hours: Case Examples***

**Service Type Usage #1: Case Example**

- *Mr. Christopher Lee was reassessed. He was getting 4 hours of HSCH weekly. He will continue to receive HSCH, but he needs an additional 4 hours, a total of 8 hours of HSCH. The Home Care Agency does not have the additional hours to give Mr. Lee. You will send the Home Care Service Plan as a "Reauthorization," but you will also place Mr. Lee on the Waitlist for "Additional Hours for Home Care."*

**Note:** In the new Cost Share form, that will be associated with the "Reauthorization" Home Care Service Plan referral, ***enter the current total of home care hours the client is receiving as well as the appropriate "Service Type."***

**Waitlist Prioritization:**  
***Additional Home Care Hours: Case Examples***

**Service Type Usage #2: Case Example**

- *Mr. William Marshall is currently receiving 8 hours of HSCH. His health has declined. He needs HMPC instead, and he needs 16 hours. However, the home care agency does not have enough slots for the full 16 hours.*

*Mr. Marshall will be put on the Waitlist for "Additional Hours for Home Care."*

**Note:** In the new Cost Share form, that will be associated with the "Service Change" Home Care Service Plan referral, ***enter the new service type of HMPC and the current total of 8 hours.***



***Waitlist, Reassessment  
& IADL/ADLs***

## Waitlist, Reassessment & IADL/ADLs

- For clients who are in receipt of home care services, the *IADL/ADLs* section of the **Assessment** reflects the provision of service by the Home Care Provider for each “unmet” need.
- If the client *requires more home care hours at the time of a Reassessment* but the Home Care Provider has no available hours, be sure the **ADL and/or IADL sections are updated to reflect any “new” unmet need(s)** before adding the client to the Waitlist. This will help to ensure that the **Weight Total** is accurate.

## Steps to Place Client on Waitlist for increase in HSCH or HMPC Service Hours

1. Conduct *Reassessment* or *Event-Based Reassessment*.
2. Update any changes in *Emergency Preparedness* section on *Client Details* level.
3. Clone most recent *Assessment* with the status of "Completed," and make any updates to:
  - *IADL/ADLs*: Reference both current formal service status and "new needs" that are not being met.
  - *NSI*: Reference any changes to nutritional health.
  - *Assistive Devices*: Reference any changes to devices used/needed.
4. After *Supervisory Review*, change cloned *Assessment* status from "Pending" to "Completed."
5. Add client to *Waitlist* and select prioritization level, "Additional Hours for Home Care" to complete process.



# Waitlist, Reassessment & IADL/ADLs

Below is the ADL section that was updated for a client who, at the time of Reassessment, was in receipt of home personal care services, but now needs more hours each week to help with bathing and personal hygiene.

**A. Bathing**

**Activity Status**  
Requires continual help with all or most of this task

**Name of Person(s)**  
--None--

**Comments**  
Client currently receiving 4 hours of home care services twice weekly. Health condition has deteriorated and now in need of more home care service hours to assist with bathing and personal hygiene.

**Need Met By**  
 Assistive Devices  
 Formal Support  
 Informal Support  
 Unmet

**Formal Support**  
EISEP Homecare

**B. Personal Hygiene**

**Activity Status**  
Requires intermittent supervision and/or minimal assistance

**Name of Person(s)**  
--None--

**Comments**  
Client currently receiving 4 hours of home care services twice weekly. Health condition has deteriorated and now in need of more home care service hours to assist with bathing and personal hygiene.

**Need Met By**  
 Assistive Devices  
 Formal Support  
 Informal Support  
 Unmet

**Formal Support**  
EISEP Homecare

**Note:** Both "Formal Support" and "Unmet" are checked in *Need Met By* field. The selection of "Unmet" helps to ensure the accuracy of the *Waitlist* weight calculation.

# Waitlist, Reassessment & IADL/ADLs

Enrollment Details Forms Assessments **Waitlist** Cost Share Plan Meal Delivery Plan Home Care Service Plan Friendly Visit Service Plan More

Waitlists (0) New

Total Weight Created Date

### Client Waitlist

**Note:** If the Prioritization Level is set to *Home Care* or *Additional Hours for Home Care*, the system will use the score from the most recent completed CMA assessment, determined by the assessment's start date.

\* Start Date: Mar 2, 2026 End Date:

\* Waitlist Prioritization Level for: **Additional Hours for Home Care**

Waitlist Status: Open

Cancel Save

### Waitlist WL-33922

**Client Waitlist**

Start Date: Mar 2, 2026 End Date:

Waitlist Prioritization Level for: **Additional Hours for Home Care** **Total Weight: 11**

Waitlist Status: Open

**IADLS**

- Unmet Need: Shopping
- Unmet Need: Laundry
- Unmet Need: Prepare & Cook Meals
- Unmet Need: Use Transportation
- Unmet Need: Housework/cleaning

**ADLS**

- Unmet Need: Bathing
- Unmet Need: Transferring
- Unmet Need: Personal Hygiene
- Unmet Need: Eating
- Unmet Need: Mobility
- Unmet Need: Dressing
- Unmet Need: Toileting

*Note ADLs, from previous slide, that were also selected as "Unmet" at time of Reassessment*

# 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
- Meal Delivery Plan: On Holds, Resumptions & Service Changes
- Reassessments & the Assessment Form: CAGE, Assistive Devices, Medical Information & Others

