

[Return to VIVÉ Knowledge Base](#)

The VIVÉ Case Management Programs Reference Guide

VIVÉ is a customized client management system designed by NYC Aging. This system supports NYC Aging contractors in managing their client interactions and reporting on services provided. This reference guide provides instructions on using the Case Management module of VIVÉ. Follow the links below to access sections of this document or external references.

You may access this guide from the VIVÉ Knowledge Base or from a program specific reference guide. At the beginning and end of this document is a link to return to the [VIVÉ Knowledge Base](#). Or you can use your browser's back button to return to a program reference guide.

This guide provides navigational and functional instructions. For assistance with program operations or policy, please refer to your program officer or view [NYC Aging's Program's Standards](#).

In this guide you will learn:

- **VIVÉ: Flow Diagrams**
- **Intake Process**
 - To Approve a client enrollment at Intake
 - To Reject a client enrollment at Intake
 - To Assign Worker
 - Assigned Worker Notifications
 - Initial Activation of the *PEC* Meal
 - Referral of a *PEC* Meal to the HDM Program
 - Best Practice, Confirm Referral is Sent
- **COMPASS & PHQ-9**
 - Accessing the COMPASS form
 - Creating a New Assessment
 - Utilizing a Pending Assessment
 - Cloning an Assessment
 - Inputting Data in the COMPASS forms
 - Assessing the PHQ-9 form
- **Cost Share Plan & Financial**
 - Cost Share Prerequisite: Financials
 - To Enter Income
 - To Enter Assets
 - To Enter Expenses
 - To Delete Financial Information
- **Cost Share Plan**
 - Creating a new Cost Share Plan

VIVÉ Knowledge Base – Case Management Programs

- EISEP Cost Share
- Community Medicaid Prescreen
- Client Agreement Checklist
- **Summary & Care Plan Notes**
 - Adding a Summary & Case Note
 - Editing a Case Note
- **Meal Delivery, Home Care & Friendly Visiting Service Plans**
 - Meal Delivery Service Plan
 - Putting a Meal Delivery Plan on Hold
 - Editing an On Hold Request
 - Terminating a Meal Delivery Plan
 - Home Care Service Plan
 - Referring Home Care Service
 - Requesting a Service Plan to be Placed On Hold
 - Edit Home Care Termination
 - Friendly Visiting Service Plan
 - Initial Activation of Friendly Visiting Service Plan – Enrollment Level
- **Other Program Actions**
 - Waitlist
 - Unit Entry

In addition to these program specific instructions, there are the following common guides:

- [Basic Navigation](#)
- [Case Notes](#)
- [Client Profile](#)
- [Client Search & Initial Data Entry](#)
- [Consent](#)
- [Contacts](#)
- [Dashboard](#)
- [Documents](#)
- [Enrollments](#)
- [Events](#)
- [Follow-Up](#)
- [Glossary](#)
- [Notifications](#)
- [NYC.ID Login](#)
- [Referrals](#)
- [Reports](#)
- [Unit Entry](#)

VIVÉ: Flow Diagrams

The following flow diagrams illustrate the navigation processes for key aspects of your work. These diagrams provide a general overview of the steps involved in completing key tasks, while also showcasing the various sections of the VIVÉ database. Detailed instructions on how to enter information are provided in each of the sections.

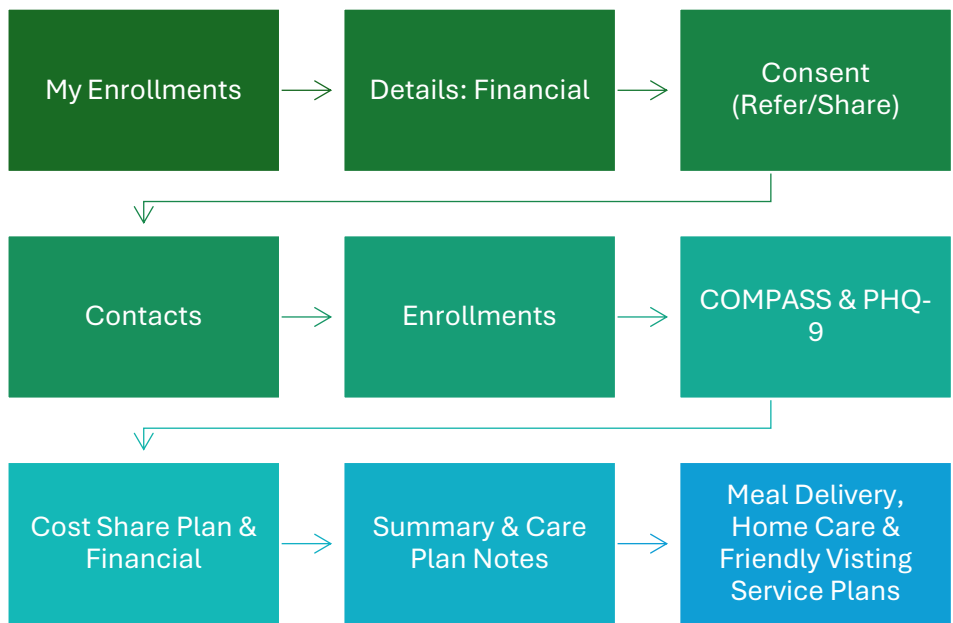
Intake Flow Chart



The diagram above outlines the major steps involved in working with a new client at the time of intake. You can navigate through these steps in this way and once information is entered you can return to previous sections as needed.

Below is a flow diagram for the major steps involved in entering assessment/reassessment information for an assessed client. You can navigate through these steps in this way and once information is entered, you can return to previous sections as needed.

Assessment Flow Chart



Intake Process

Intake Flow Chart



When completing an intake in VIVÉ, the process follows the basic flow that is represented in the **Intake Flow Chart** diagram above.

- Conduct a **Client Search** to see if the older adult is known in the database or needs to be added as a new client.
- Ensure that verbal **Consent to Collect Data** is noted to continue with the collection of client information.
- On the **Client Profile** level, capture information associated with **Basic Demographics, Social Demographics, Emergency Preparedness, Financial, and NYSOFA Additional Information**.

NOTE: For clients in need of **Home Care** services, information about their income, assets and expenses **must be** added on the **Financial** form located on the **Details** sub-menu. Information from this form is used to tabulate the client's **Cost Share** on the **Enrollment** level. The **Financial** form and its relation to **Cost Share** is discussed in detail in the **Assessment** section.

- **Contacts** are added as provided by the client on the **Details** level.

NOTE: To help streamline navigation when completing certain sections of the **COMPASS** (e.g., health care status, legal information, IADL/ADLS and caregiver support), add contacts **prior** to accessing the **COMPASS**.

- A new **Enrollment** is then created. The **Enrollment Status** is noted **In Review** until the intake is approved. The status then changes to **Active**.

Focus is now given to these last two components of the Intake Flow Chart – **CMA/HDM Intake/ PEC Meal** and **Review & Worker Assignment**.

VIVÉ Knowledge Base – Case Management Programs

There are six forms that are a part of the initial intake for case management services. These forms are divided into two types: Page View or List View.

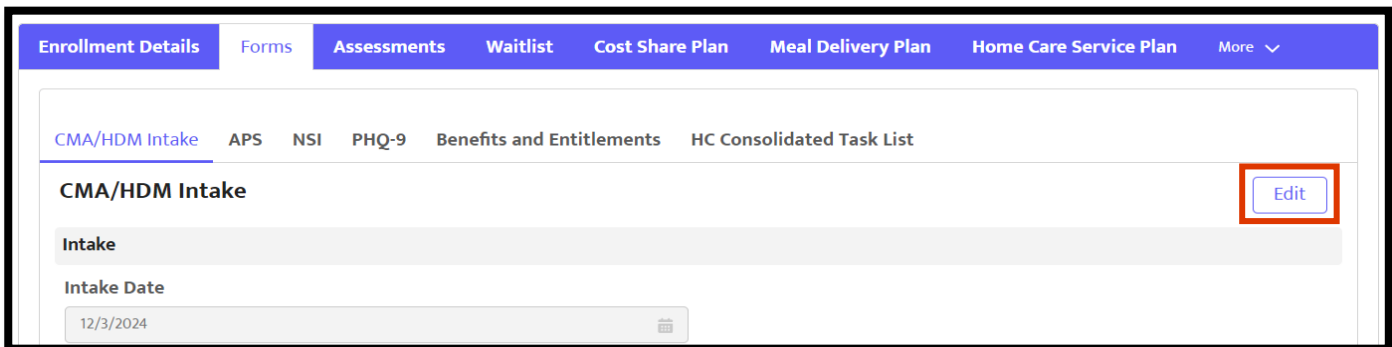
- **Page View** forms link directly to the questions. Intake Page View forms are CMA/HDM Intake, APS, and Benefits & Entitlements.
- **List View** forms provide a list of completed forms. The list includes many completed forms, such as someone's severity of depression from the PHQ-9. Intake List View forms are the NSI and PHQ-9.

Step 1: From the **Top Menu**, click **Client Search**, click on the client's name link.

Step 2: From the **Details** Menu, click the **Enrollments** tab, click on an active enrollment link.

Step 3: Click on the **Forms** tab to view the sub-menu of intake forms.

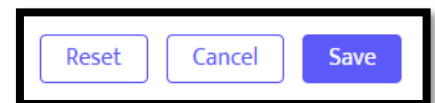
Example Page View form: CMA/HDM Intake. Select **Edit** to begin entering or editing the information.



The screenshot shows a web application interface with a blue header bar containing navigation tabs: Enrollment Details, Forms, Assessments, Waitlist, Cost Share Plan, Meal Delivery Plan, Home Care Service Plan, and More. Below the header, there is a sub-menu with links for CMA/HDM Intake, APS, NSI, PHQ-9, Benefits and Entitlements, and HC Consolidated Task List. The main content area displays the 'CMA/HDM Intake' form. The form has a title 'CMA/HDM Intake' and an 'Edit' button highlighted with a red box. Below the title, there is a section for 'Intake' with a date field set to '12/3/2024'.

After entering or editing all of the required fields of a Page View form, there are three actions.

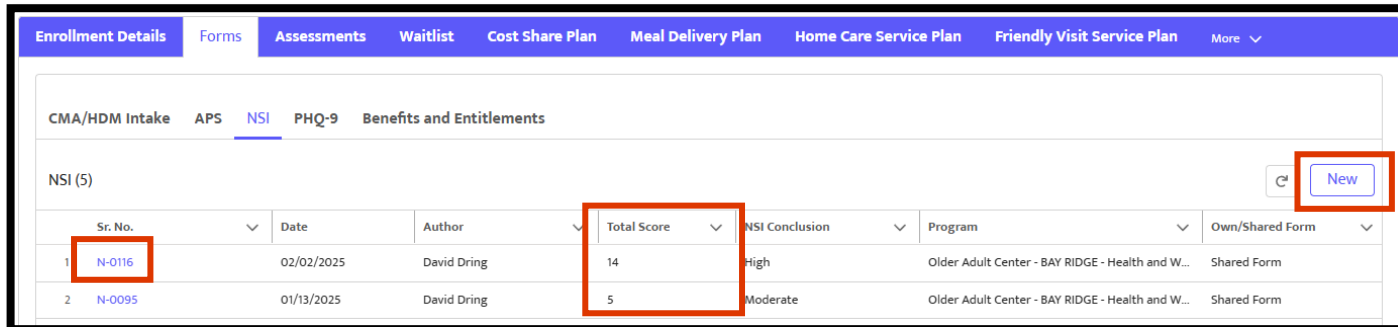
- **Reset:** A pop-up box asks you to confirm that you want to clear all the information entered.
- **Cancel:** Does not save any information and returns to the previously saved form.
- **Save:** The information entered is saved and you remain on the page.



The screenshot shows a pop-up box with three buttons: Reset, Cancel, and Save. The buttons are arranged horizontally and are styled with a blue background and white text.

VIVÉ Knowledge Base – Case Management Programs

List View forms are the NSI and PHQ-9. While they behave similarly, there is one key difference. For both the NSI and PHQ-9, select **New** to begin entering information or click the form number to edit an existing form. Both the NSI and PHQ-9 calculate a score based upon the entered information. They must be saved to calculate the score and then **Save & Exit** will return you to the List View where the score appears.

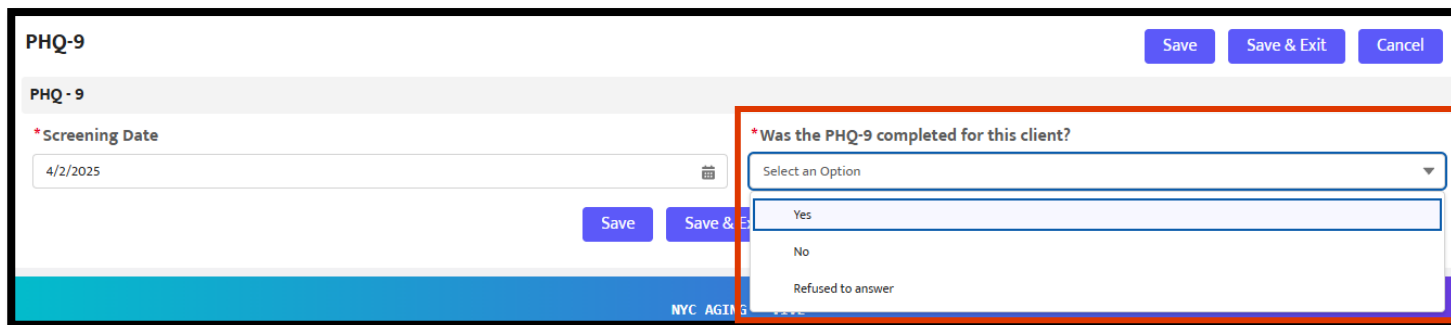


Sr. No.	Date	Author	Total Score	NSI Conclusion	Program	Own/Shared Form
N-0116	02/02/2025	David Dring	14	High	Older Adult Center - BAY RIDGE - Health and W...	Shared Form
N-0095	01/13/2025	David Dring	5	Moderate	Older Adult Center - BAY RIDGE - Health and W...	Shared Form

List View forms have multiple options after you create or edit the page. They are:

- **Reset:** A pop-up box asks you to confirm that you want to clear all the information entered.
- **Cancel:** Does not save any information and returns to the previously saved form.
- **Save:** The information entered is saved and you stay on the form.
- **Save & Exit:** The information entered is saved and you are returned to the previous form.

The PHQ-9 form is unique in that it asks an initial conditional question: **Was the PHQ-9 completed for this client?** A **Yes** answer displays all the required PHQ-9 fields. After all the fields are entered or edited, select **Save** to calculate the score and then **Save & Exit** or **Cancel** to return to the List View.



PHQ-9

PHQ - 9

* Screening Date
4/2/2025

* Was the PHQ-9 completed for this client?
Select an Option
Yes
No
Refused to answer

Other forms that are part of the intake process have unique attributes as well. For example, the Benefits & Entitlements form includes external links to screening services such as AccessNYC and BenefitsCheckUp.

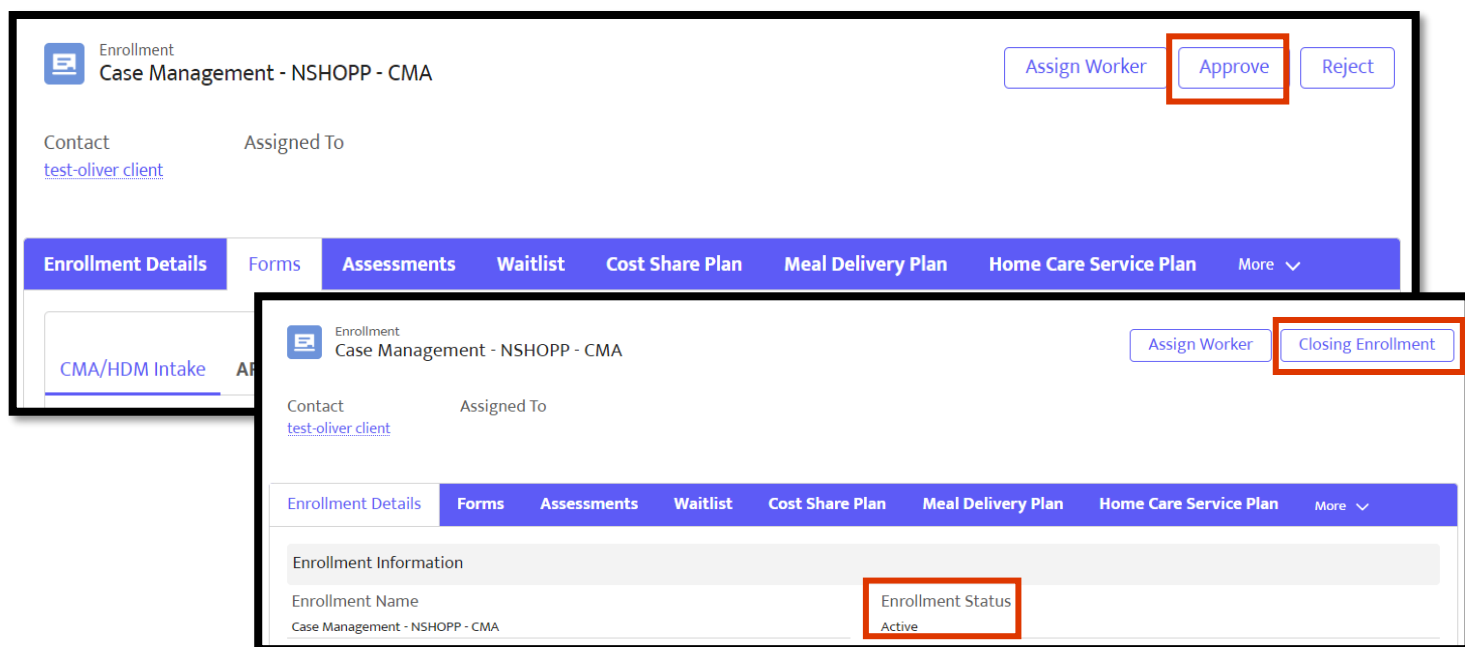
NOTE: The **Intake Date** field on all forms defaults to today's date. Intake dates can be back dated. However, they cannot be dated in the future.

Review & Worker Assignment

The initial status of a client's enrollment is In Review. Once the intake is completed, the case is reviewed by a supervisor and is either approved or rejected. From within any tab of **Enrollment Details** the **Assign Worker**, **Approve** and **Reject** buttons are available in the upper right corner.

To Approve a client enrollment at Intake

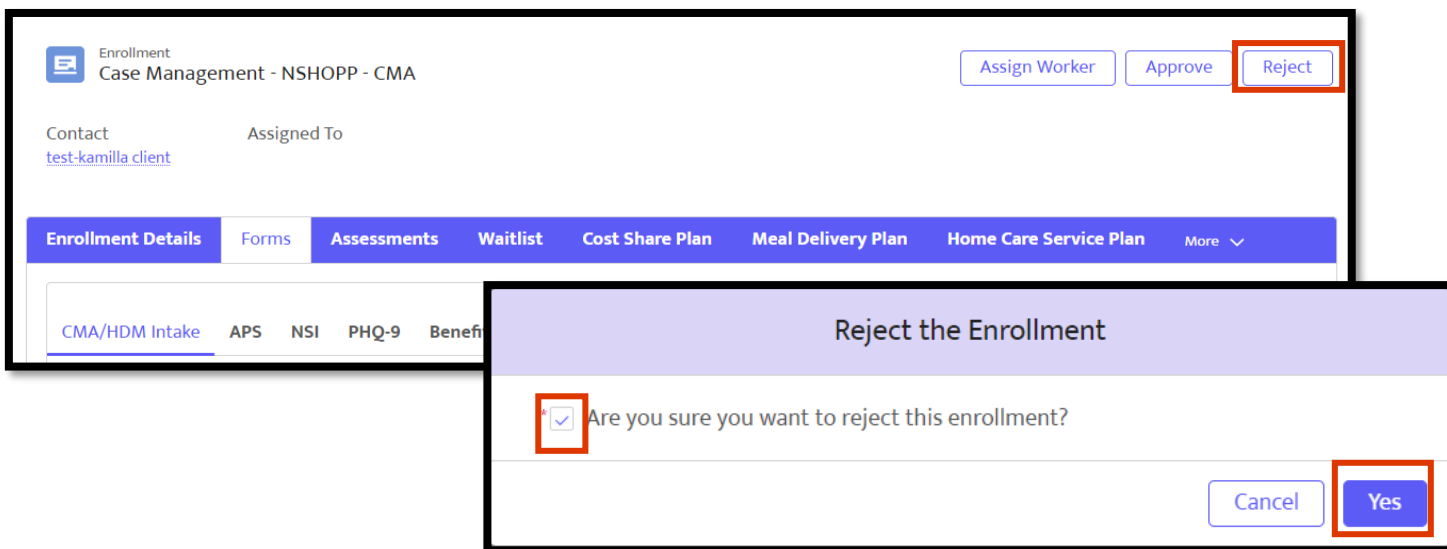
Step 1: The Supervisor selects the **Approve** button. The Enrollment Status switches to **Active**. The buttons switch as well. **Closing Enrollment** replaces the **Active** and **Reject** buttons.



To Reject a client enrollment at Intake

Step 1: Select the **Reject** button.

Step 2: Confirm that you are rejecting the client on the **Reject the Enrollment** pop-up by checking the box. Then select **Yes**.

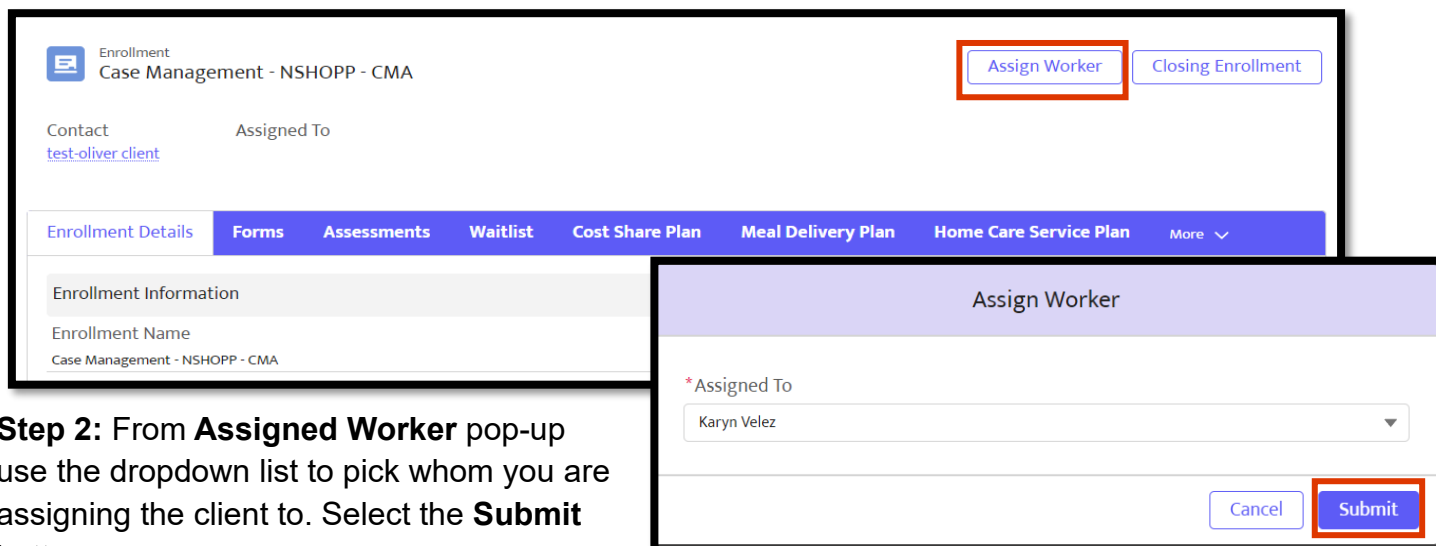


NOTE: Once the Reject button is selected and the client becomes Inactive, the only way to “reactivate” the client’s Enrollment, is by creating a new Enrollment.

To Assign Worker

You can assign a worker to distribute the caseload or choose a specific person to help you with the case, such as a supervisor to review the intake.

Step 1: Select the **Assign Worker** button.

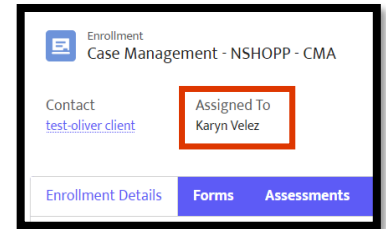


Step 2: From **Assigned Worker** pop-up use the dropdown list to pick whom you are assigning the client to. Select the **Submit** button.

Assigned Worker Notifications

There are three ways that workers are informed about their assignment to a client:

- The assigned worker is displayed on the page header.
- The worker receives a notification within their Bell icon on the **Top Menu**.
- The client's name appears within the worker's **My Enrollments** on the Dashboard. You may need to **Refresh** the **Dashboard** page to view new client information.



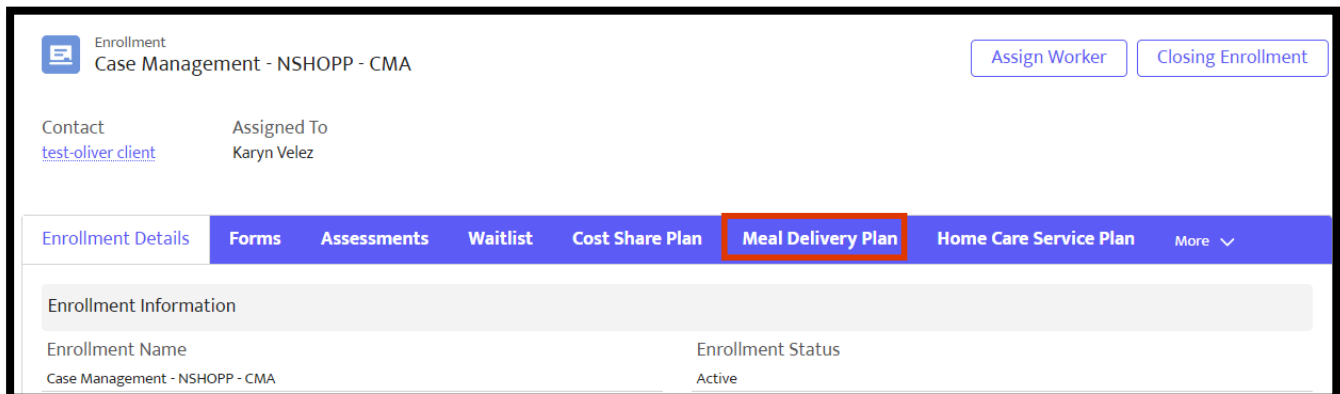
NOTE: If the worker assignment needs to be changed, the **Assign Worker** button continues to be available on the **Enrollment Details Menu**. Complete this same process to re-assign the client's case.

Authorizing a PEC Meal

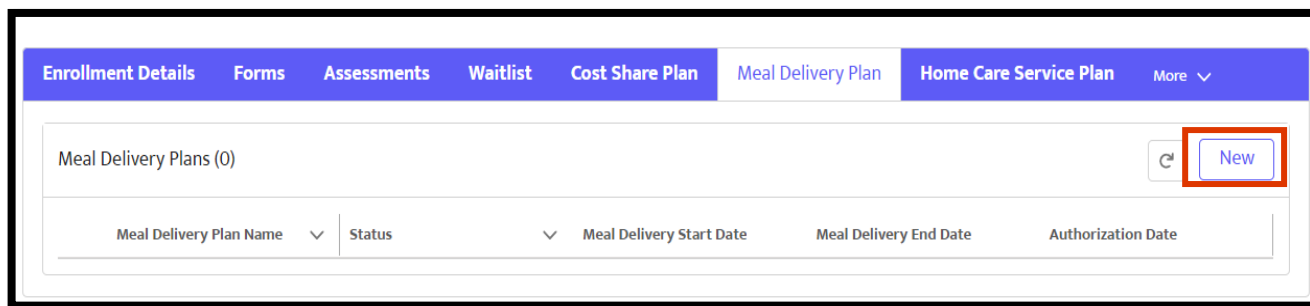
At the time of the **CMA/HDM Intake**, a **Presumptive Eligible Client (PEC)** home delivered meal can be authorized for clients once the intake is completed. A **PEC Meal** can be activated and referred to your HDM provider before the client's in-home assessment is completed.

Initial Activation of the PEC Meal

Step 1: From the **Enrollment Details Menu**, click the **Meal Delivery Plan** tab.



Step 2: Select the **New** button to start a new **Meal Delivery Plan**.



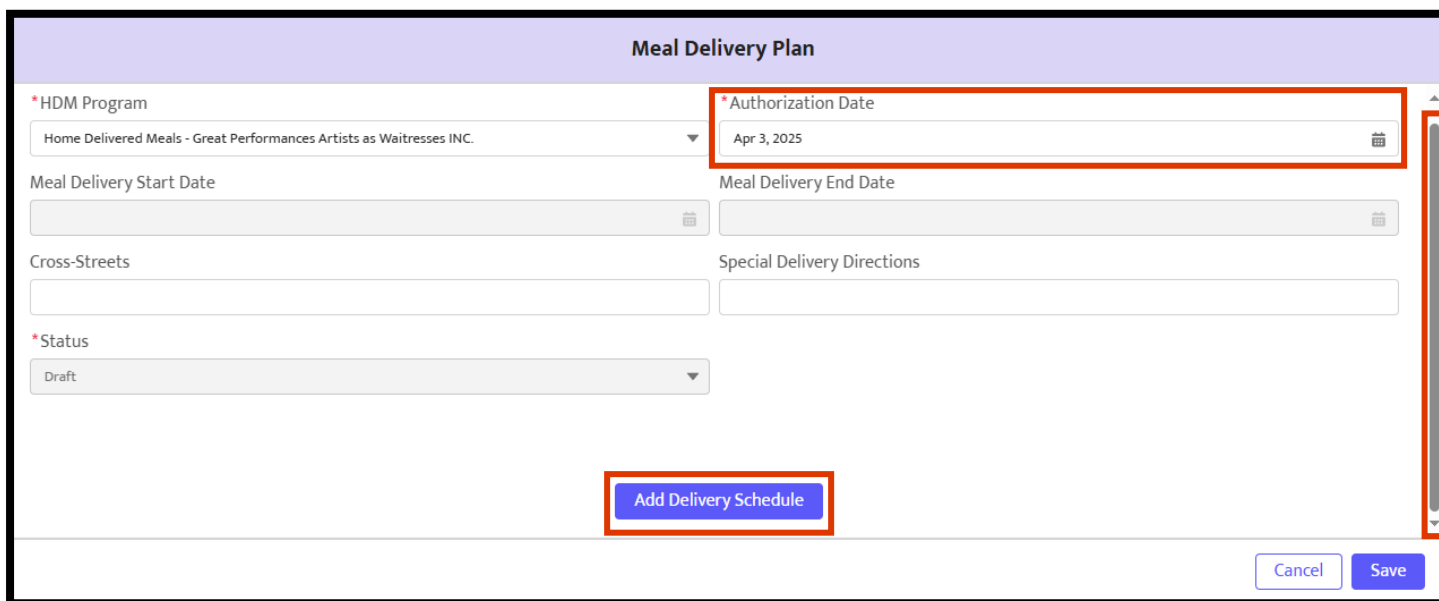
Step 3: The Meal Delivery Plan includes fields that are completed by you and others completed by your HDM provider. The fields completed by you are:

- **Authorization Date (required):** While this date is prepopulated to today, it can be changed to either a previous or future date.
- **Cross-Streets & Special Delivery Directions:** Helpful information for the drivers.

These fields are completed **ONLY** by the HDM Provider:

- **Meal Delivery Start Date**
- **Meal Deliver End Date** (optional)
- **Status:** This is the trigger indicating the start of service.

Step 4: Select the **Add Delivery Schedule** button to access the **Service Type** and **Diet Type**. You may need to use the vertical scroll bar on the right side of the window.



After selecting the **Add Delivery Schedule** button, a row appears. The row's column headings include **Service Type**, **Diet Type**, the days of the week and **Funding Source**. **Only Service Type**

and **Diet Type** are for you to edit. All other row fields are the responsibility of the **HDM Program**. The **Trash Can** icon can be used to delete its associated row.

Step 5: Select the **Service Type** and **Diet Type** dropdowns to indicate the meal delivery schedule.

Step 6: Re-select the **Add Delivery Schedule** button and add more deliveries, such as 6th (Saturday) or 7th (Sunday) day meals. As the number of rows grow, use the scroll bar to access the **Add Delivery Schedule** button.

The screenshot shows the 'Meal Delivery Plan' form. At the top, there are input fields for 'Cross-Streets' and 'Special Delivery Directions'. Below these is a 'Status' dropdown menu set to 'Draft'. The main part of the form is a table with columns for days of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun) and a 'Funding Source' column. The first three rows are highlighted with a red box, showing 'Weekday', '6th Meal', and '7th Meal' as 'Service Type' and 'Hot Regular' as 'Diet Type'. Below the table is a blue 'Add Delivery Schedule' button, also highlighted with a red box. At the bottom right, there are 'Cancel' and 'Save' buttons.

#	Service Type	*Diet Type	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Funding Source	
1	Weekday	Hot Regular								Select an Option	🗑️
2	6th Meal	Hot Regular								Select an Option	🗑️
3	7th Meal	Hot Regular								Select an Option	🗑️

Step 7: Confirm that all required fields are completed before selecting **Save**. The meal plan is displayed on the **Meal Delivery Plan** List View in **Draft** status. If changes to the plan are needed, click the **Meal Delivery Plan Name** link to access the plan and make changes.

NOTE: While a Meal Delivery Plan is in Draft status, no new meal plan can be added.

Referral of a **PEC** Meal to the HDM Program

A **PEC Meal Delivery Plan** can be referred to the **HDM Program** directly from the **Meal Delivery Plan** form. The steps for sending this referral type are as follows:

Step 1: From the **Enrollment Details Menu**, click the **Meal Delivery Plan** tab. From its List View, click the desired **Meal Delivery Plan** link.

Step 2: From the **Meal Delivery Plan** page, select the **Create Referral** button.

Step 3: The **Client Referral Form** pop-up appears with pre-populated data from the **Meal Delivery Plan** that cannot be edited. The only editable field is the **Comments** text box where additional information regarding the meal delivery is shared.

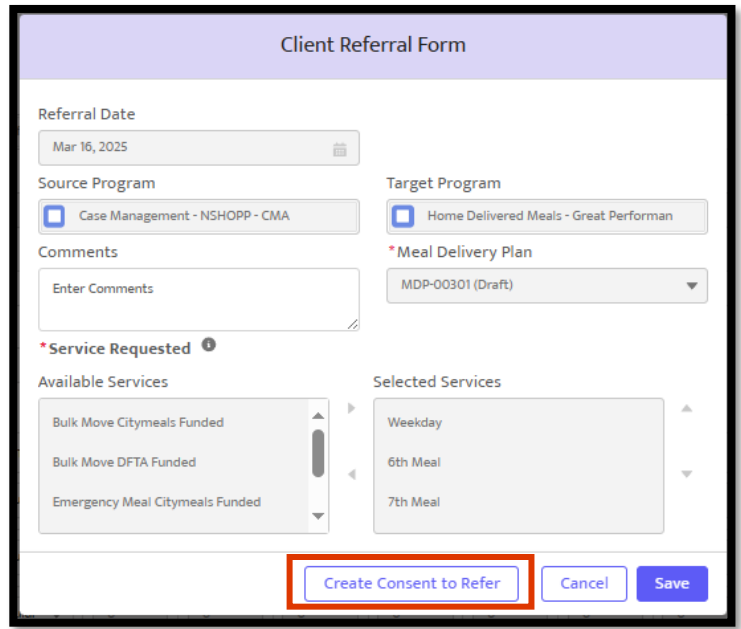
The image displays two overlapping screenshots from a software interface. The top screenshot shows the 'Meal Delivery Plan' form for MDP-00192. The form includes fields for Client (test-oliver.client), Assigned To (Karyn Velez), HDM Program (Home Delivered Meals - Great Performances Artists as Waitresses INC.), Authorization Date (Dec 31, 2024), and a table of service types. A 'Create Referral' button is highlighted in the top right. The bottom screenshot shows the 'Client Referral Form' with fields for Referral Date (Dec 31, 2024), Source Program (Case Management - NSHOPP - CMA), Target Program (Home Delivered Meals - Great Performan), and a 'Service Requested' section with 'Available Services' and 'Selected Services' lists. A 'Save' button is highlighted in the bottom right.

#	* Service Type	* Diet Type	Mon	Tue
1	Weekday	Hot Regular	0	0
2	6th Meal	Hot Regular	0	0
3	7th Meal	Hot Regular	0	0

Step 4: Confirm that all required fields are completed before selecting **Save**. The system returns to the **Meal Delivery Plan** form.

NOTE: To send PEC Meal referrals from the Meal Delivery Plan, a verbal **Consent to Share/Refer** must first be created. This consent type is created by selecting the **Consents** tab on the “Client Profile” level and completing the form.

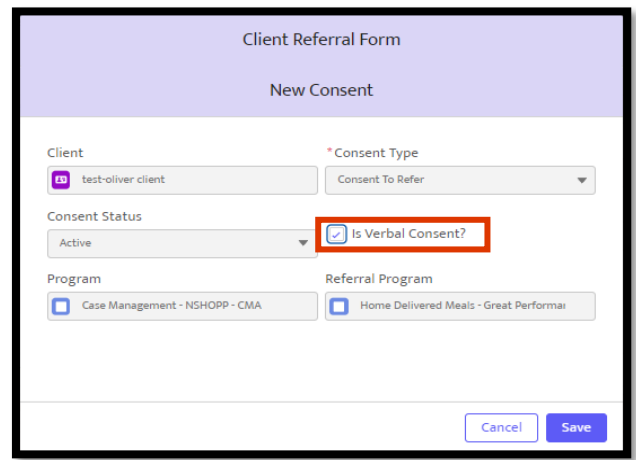
Step 5: Obtain consent from the client before sending the referral. Upon selecting **Save**, a new button, **Create Consent to Refer**, appears requiring you to complete the consent if it has not been done. Select the button.



The screenshot shows the 'Client Referral Form' interface. It includes fields for 'Referral Date' (Mar 16, 2025), 'Source Program' (Case Management - NSHOPP - CMA), and 'Target Program' (Home Delivered Meals - Great Performer). There is a 'Comments' section and a '* Service Requested' section with 'Available Services' and 'Selected Services' (Weekday, 6th Meal, 7th Meal). At the bottom, the 'Create Consent to Refer' button is highlighted with a red box, along with 'Cancel' and 'Save' buttons.

Step 6: The **Client Referral Form: New Consent** pop-up appears with pre-populated fields. Remember to select the **Is Verbal Consent?** checkbox and select the **Save** button to complete the process.

Once consent is recognized, the system returns to the **Client Referral Form** pop-up and the **Save** button can be selected.



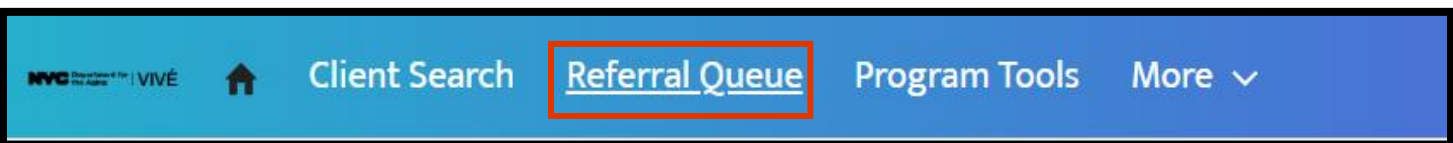
The screenshot shows the 'Client Referral Form: New Consent' pop-up. It includes fields for 'Client' (test-oliver client), '* Consent Type' (Consent To Refer), 'Consent Status' (Active), and 'Program' (Case Management - NSHOPP - CMA). The 'Is Verbal Consent?' checkbox is checked and highlighted with a red box. At the bottom, there are 'Cancel' and 'Save' buttons.

NOTE: Once the client is assessed, the Consent Refer/Share form must be signed and uploaded into the client's file on VIVÉ.

Best Practice, Confirm Referral is Sent

Use the **Referral Queue** to confirm your referral was sent.

Step 1: From the **Top Menu**, select **Referral Queue**.

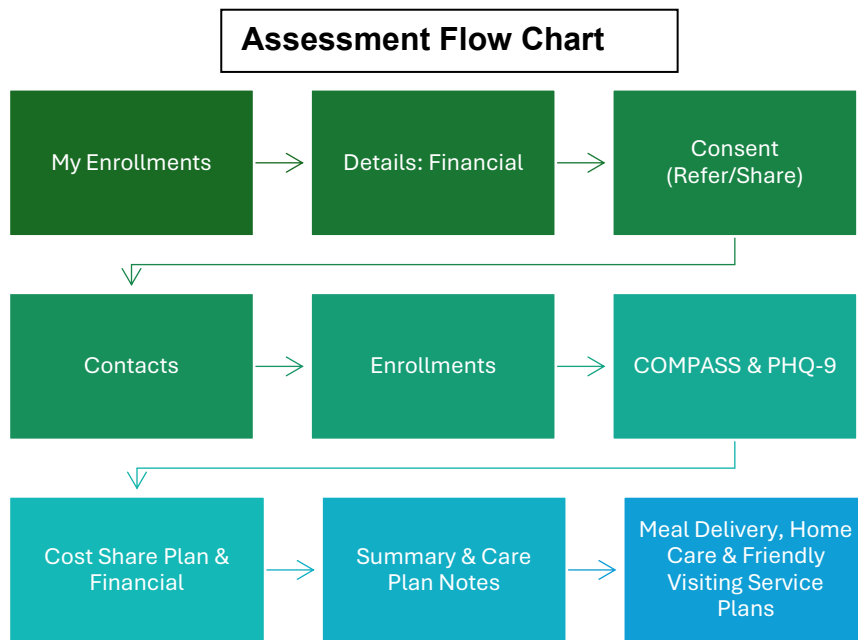


The screenshot shows the VIVÉ top navigation menu. It includes the NYC logo, a home icon, 'Client Search', 'Referral Queue' (highlighted with a red box), 'Program Tools', and 'More' with a dropdown arrow.

Step 2: From the dropdown, pick **Referrals shared by my Program**. Use either the **Referral Name**, **Referral Date** or **Contact** columns to find the desired referral. Click on the **Referral Name** link to access the referral details.

Referral ...	Referral Sta...	Referral Date	Source Program	Target Program	External Ag...	Contact
1 RF-730	Cancelled	12/31/2024	Case Management - NSHOPP - CMA	Friendly Visiting - NSHOPP - CMA		Buffy Summers
2 RF-758	Referral Sent	12/31/2024	Case Management - NSHOPP - CMA	Home Delivered Meals - Great Performan...		Everything VIVÉ
3 RF-728	Referral Sent	12/31/2024	Case Management - NSHOPP - CMA	Home Delivered Meals - Great Performan...		David Duchovny

Assessment Flow Chart



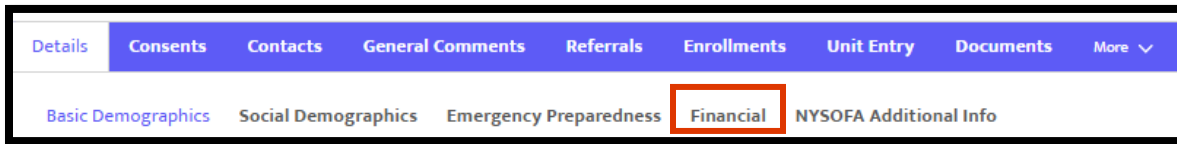
When completing the input of the **COMPASS** assessment data in VIVÉ, the process follows the basic flow that is represented in the **Assessment Flow Chart** diagram above.

- On the **Dashboard**, under **My Enrollments** select the **Contact** link for the client. This will bring you to the **Client Profile** level and its associated menu.

Contact	Enrollment: Enrollment Name	Enrollment Status	Enrollment Date	Service Start Date
Alfred client	Case Management - NSHOPP - CMA	Active	2/6/2025	2/6/2025
Alistar Cook	Case Management - NSHOPP - CMA	Active	1/17/2025	1/17/2025

VIVÉ Knowledge Base – Case Management Programs

- On the **Client Profile** menu is the **Details** tab and its associated sub-menu. Utilizing the **Financial** sub-tab, add any information regarding the client’s finances gathered during the in-home assessment. The **Financial** form and related **Cost Share** are discussed in this section.



- On the **Client Profile** menu is the **Consent** tab. The **Consent to Collect Data** form and any necessary **Consent to Refer/Share** forms are uploaded via this tab.
- On the **Client Profile** menu is the **Contacts** tab. Any **Contacts** shared during the in-home assessment are added via the **Contacts** tab.
- On the **Client Profile** menu is the **Enrollments** tab. On the **Enrollments** List View, click the **Enrollment Name** link to open the **Enrollment Details Menu** where the **Assessments** tab is found.

Focus is now on the last four components of the **Assessment Flow Chart – COMPASS & PHQ-9, Cost Share Plan & Financial, Summary & Care Plan Notes** and **Meal Delivery, Home Care & Friendly Visiting Service Plans**.

COMPASS & PHQ-9

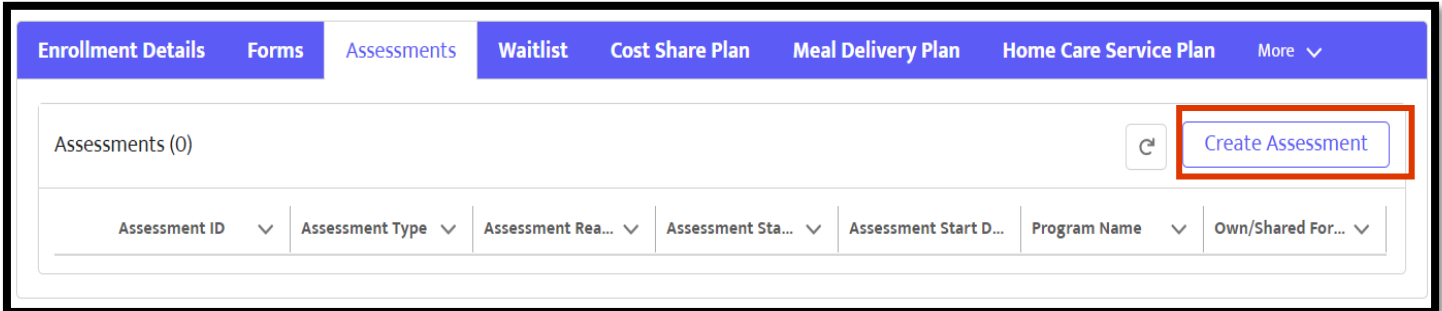
In this section, we discuss the various ways the **COMPASS** form is accessed and provide navigational instructions on how to input data into the form. In addition, we review how to navigate and input data into the **PHQ-9** form.

Accessing the COMPASS form

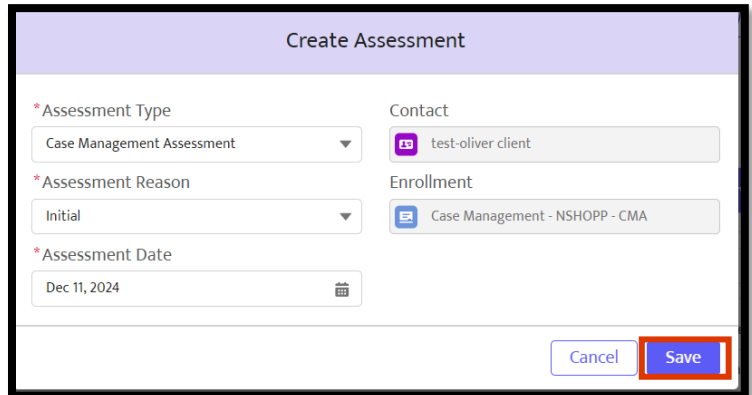
You can access the **COMPASS** form in one of three ways: 1) by creating a new **Assessment**, 2) by opening an existing **Assessment** that has a status of **Pending** or 3) by **Cloning** an **Assessment** with a status of **Completed**. The steps for each of these options are as follows:

Creating a New Assessment

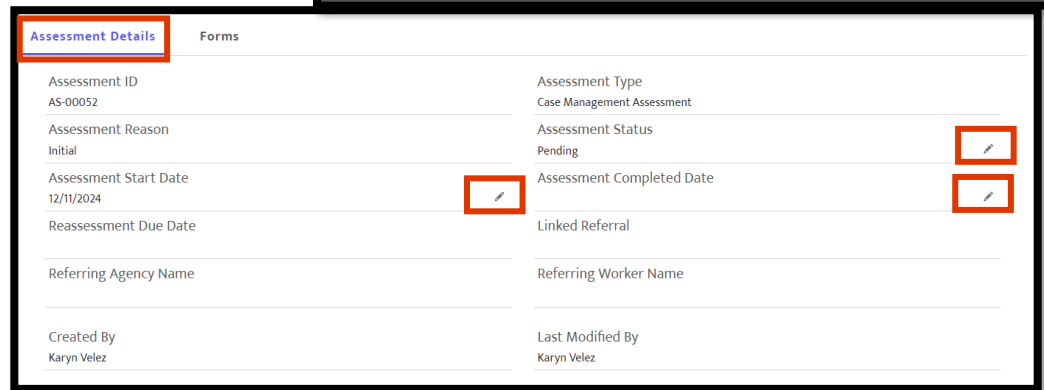
Step 1: From the **Enrollment Details Menu**, click the **Assessments** tab. Select the **Create Assessment** button to activate a new assessment.



Step 2: From the **Create Assessment** pop-up, complete the **Assessment Type**, **Assessment Reason** and **Assessment Date**. The **Assessment Date** can be a previous, but not a future, date. **Contact** and **Enrollment** is not editable. Confirm that all required fields are completed before selecting **Save**.



The **Assessment Details** form displays and provides an overview of key information associated with the assessment. Select any pencil icon to make edits.



Step 3: Select the **Forms** tab to open the **COMPASS**. The sections on the COMPASS form are divided into sub-tabs. Information for a particular section is added or edited by first selecting its sub-tab. For COMPASS sections not visible among the sub-tabs, click on **More** to access the dropdown of all COMPASS Forms.

NOTE: If there is an Assessment with the status of Pending, you cannot create another. You must change the status of the pending Assessment to **Completed** before creating a new one.

The screenshot shows the 'Forms' tab selected in the top navigation. Below it, the 'Client Information' section is visible with input fields for Name, Address, and Gender Pronouns. A 'More' dropdown menu is open on the right, listing various assessment categories such as Nutrition, NSI, CAGE, Psycho-Social Sta..., Loneliness Scale, Medication List, Risk Factors for F..., Assistive Devices, IADLS, ADLS, Benefits and Enti..., and Current Services.

Utilizing a Pending Assessment

Step 1: From the **Enrollment Details Menu**, click the **Assessments** tab. The List View displays three assessment types: pending, completed and inactive. Only the pending one is editable. Click the **Assessment ID** link to view its details.

Assessment ID	Assessment Type	Assessment Reason	Assessment Status	Assessment Start Date	Program Name	Own/Shared Form
AS-22730	Case Management Asses...	Follow up	Pending	04/03/2025	Case Management - NSH...	Own Form
AS-22729	Case Management Asses...	Initial	Completed	02/25/2025	Case Management - NSH...	Own Form

Step 2: From the **Assessment Details**, click on the **Forms** tab.

Step 3: Click one of the Forms from the sub-tabs. For COMPASS sections not visible among the sub-tabs, click on **More** to access the dropdown of all COMPASS Forms.

Cloning an Assessment

At the time of reassessment, to save time with completing the COMPASS Reassessment, there is the option to clone or copy the previous assessment.

Step 1: From the **Enrollment Details Menu**, click the **Assessments** tab. On the List View, look for the most recent **Assessment** with the **Status** of **Completed**.

Step 2: Click on the **Assessment ID** link associated with the completed **Assessment**.

Assessment ID	Assessment Type	Assessment Rea...	Assessment Status	Assessment Start D...	Program Name	Own/Shared For...
AS-00027	Case Management As...	Initial	Completed	12/04/2024	Case Management - ...	Own Form

Step 3: On **Assessment Details** select the **Clone Assessment** button.

Assessment AS-00027

Clone Assessment

Linked Enrollment: Case Management - NSHOPP...

Contact: test-maxine client

Assigned To: Karyn Velez

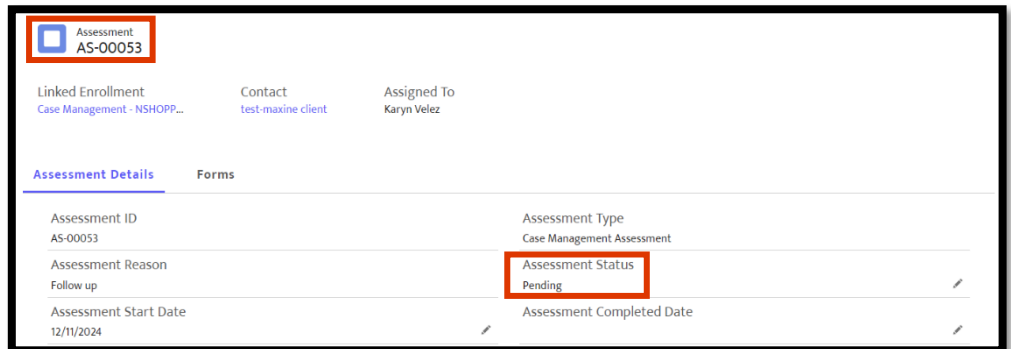
Clone Assessment

If you clone this assessment, a new assessment will be created for the client with pending status. Are you ready to clone this assessment?

Cancel Yes

Step 4: The **Clone Assessment** pop-up confirms the cloning process. If you agree, select **Yes** and you are returned to a new **Assessment Details** page with a new ID with the status **Pending**.

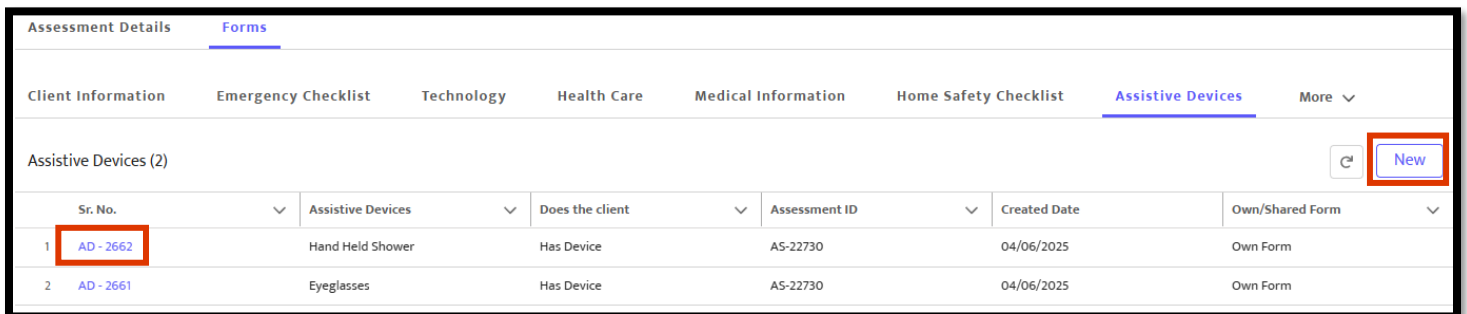
Step 5: Click on the Forms tab. Click on one of the sub-tabs. Click **More** for a dropdown menu of forms not visible.



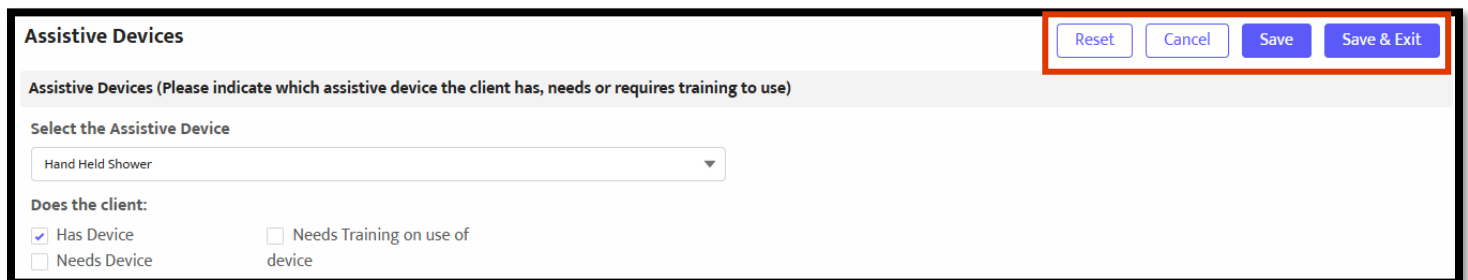
Inputting Data in the COMPASS forms

While the process of using the forms is similar, there are different styles. The first is a List View, such as Assistive Devices. List View forms display all forms saved. When editing a List View form, click on the form ID number link to access the details. The second is a single Page View form, such as Client Information. Page View is a single form that when edited overwrites the previous entry.

Example List View: Assistive Devices



Select **New** to create an entry or click on the identification number link to edit an existing entry.

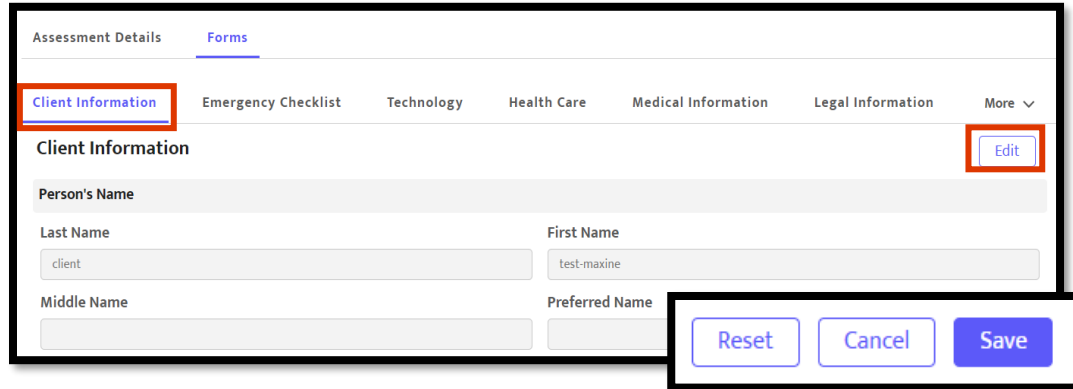


List View forms have multiple options after you have viewed or edited the page. They are:

- **Reset:** A pop-up box asks you to confirm that you want to clear all the information entered.
- **Cancel:** Does not save any changes and reverts to the last version of the saved form.
- **Save:** The information entered is saved and you stay on the form.
- **Save & Exit:** The information entered is saved and you return to the List View.

Example of Page View: Client Information

Some fields are grey because they are pre-populated from the **Client Profile**. Select the **Edit** button to make changes.



After editing a Page View form, there are three actions: **Reset**, **Cancel** and **Save**. These actions have the same properties described under List View.

TIP: *In most cases, use of the Reset button occurs when updating previously recorded data in a Cloned Assessment.*

Here is a list of the case management forms that are either Page View or List View. The chart below highlights which functionality, **Edit** or **New**, is used to input data into the **COMPASS**.

Page View: Edit Button	List View: New Button
Client Information	Medical Information
Emergency Checklist	CAGE
Technology	Loneliness Scale
Health Care	Medications List
Legal Information	Assistive Devices
Nutrition	
NSI	
Psycho-Social Status	
Risk Factors for Falls	
IADLS	
ADLS	
Benefits and Entitlements	

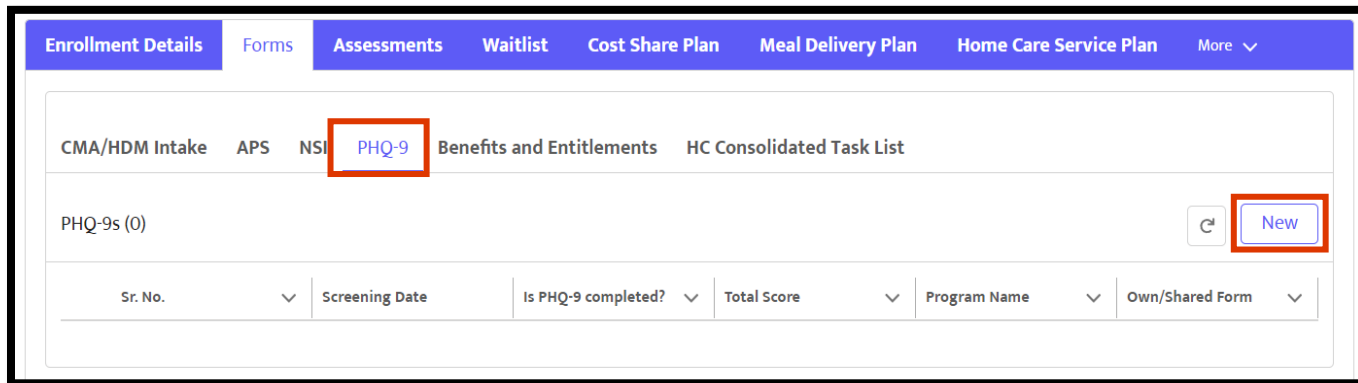
Page View: Edit Button	List View: New Button
Current Services	
Caregiver Support Status	

NOTE: In VIVÉ, the **Financial** tab takes the place of the **Monthly Income** section found in the hard copy of the **COMPASS**. As a reminder, the **Financial** section is a sub-tab of the **Details** tab.

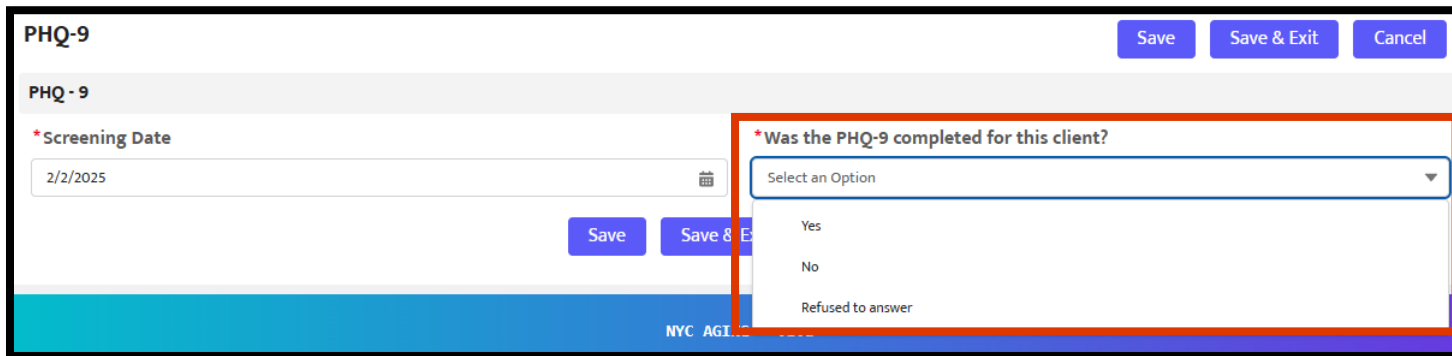
Assessing the PHQ-9 form

The **PHQ-9** form is found on the **Enrollment Details** Menu. It is on the sub-menu of the **Forms** tab.

Step 1: Click the **PHQ-9** sub-tab. The List View appears providing a general overview of the information associated with each listed record. Select **New** to create an entry.



The **PHQ-9** is a conditional form. You must answer **Yes** to the question **Was the PHQ-9 completed for this client?** for additional questions to display.



NOTE: The **Screening Date** defaults to today. It can be backdated but never dated in the future.

VIVÉ Knowledge Base – Case Management Programs

PHQ-9

PHQ - 9

* Screening Date: 3/17/2025

* Was the PHQ-9 completed for this client? Yes

Over the last 2 weeks, how often have you been bothered by any of the following problems?

*1. Little interest or pleasure in doing things

*2. Feeling down, depressed, or hopeless

*3. Trouble falling or staying asleep, or sleeping too much

*4. Feeling tired or having little energy

*5. Poor appetite or overeating

*6. Feeling bad about yourself - or that you are a failure or have let yourself or your family down

*7. Trouble concentrating on things, such as reading the newspaper or watching television

*8. Moving or speaking so slowly that other people could have noticed. Or the opposite - being so fidgety or restless that you have been moving around a lot more than usual

*9. Thoughts that you would be better off dead or of hurting yourself in some way

Score

PHQ Total Score: []

Depression Severity: []

10. If you checked off any problems, how difficult have these made it for you to do work/take care of things at home?

PHQ Comment: []

Buttons: Save, Save & Exit, Cancel

PHQ-9 PH-1857

Contact: Alfred client

Enrollment: Case Management - NDSOPP - CMA

Assessment ID

Assigned To: Karyn Velez

Created By: Karyn Velez

PHQ-9

PHQ - 9

* Screening Date: 3/17/2025

* Was the PHQ-9 completed for this client? Yes

Over the last 2 weeks, how often have you been bothered by any of the following problems?

*1. Little interest or pleasure in doing things

*2. Feeling down, depressed, or hopeless

*3. Trouble falling or staying asleep, or sleeping too much

*4. Feeling tired or having little energy

*5. Poor appetite or overeating

*6. Feeling bad about yourself - or that you are a failure or have let yourself or your family down

*7. Trouble concentrating on things, such as reading the newspaper or watching television

*8. Moving or speaking so slowly that other people could have noticed. Or the opposite - being so fidgety or restless that you have been moving around a lot more than usual

*9. Thoughts that you would be better off dead or of hurting yourself in some way

Score

PHQ Total Score: 5

Depression Severity: Mild Depression

10. If you checked off any problems, how difficult have these made it for you to do work/take care of things at home?

PHQ Comment: []

Buttons: Edit, Cancel

After answering all the questions, select **Save** and the score is calculated. Then select **Cancel** to return to the List View.

If **No** is selected, indicate why the form could not be completed. Use the dropdown arrow to pick a reason. The selection **Refused to answer**, does not open additional questions.

Cost Share Plan & Financial

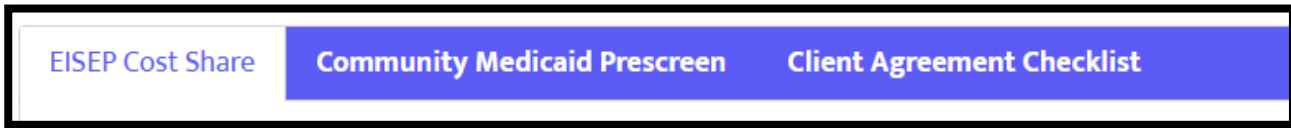
The **Cost Share Plan** is a tab on the **Enrollment Details Menu**.

Enrollment Details | Forms | Assessments | Waitlist | **Cost Share Plan** | Meal Delivery Plan | Home Care Service Plan | More ▾

Cost Shares (0) New

Name	Who is providing financial ...	Cost Share Date	Status	Created Date

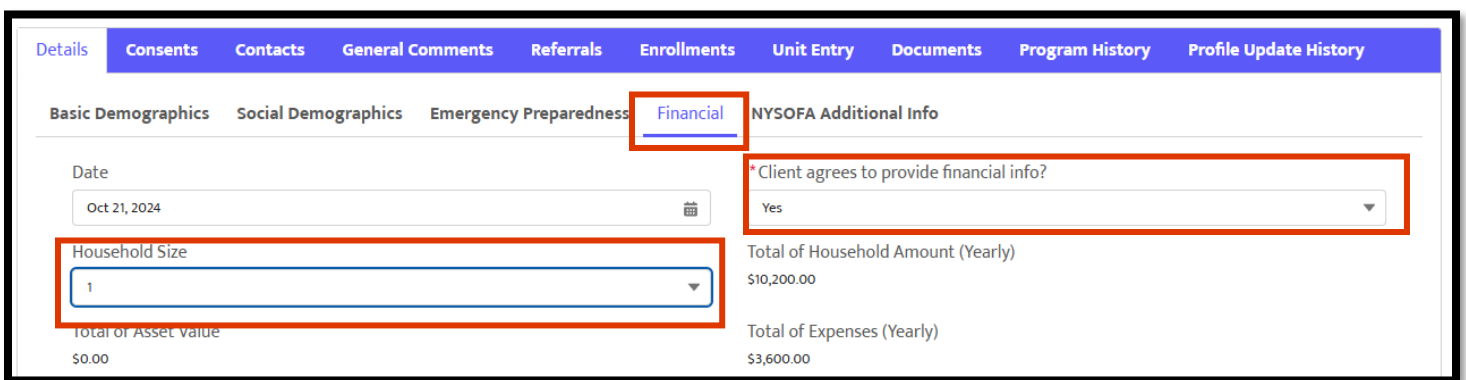
In the **Cost Share Plan** form are three sub-tabs – **EISEP Cost Share**, **Community Medicaid Prescreen** and **Client Agreement Checklist**. Each of these forms must be completed to generate a **Cost Share Plan** used in the creation of a **Home Care Service Plan** referral.



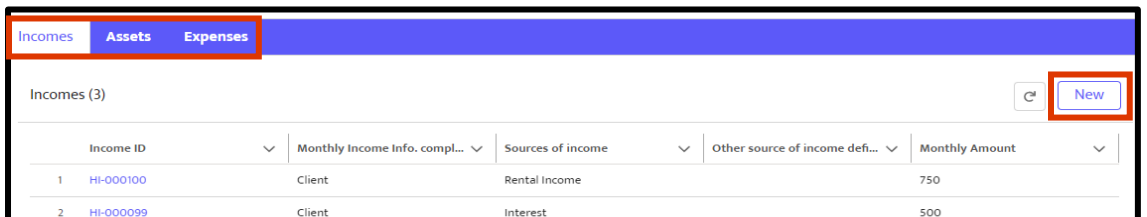
Cost Share Prerequisite: Financials

The **Financial** form, from the **Details** tab's sub-menu, **must be completed** before the **Cost Share Plan** is developed. Information from the Financial section is calculated to determine the cost share. Any changes in financial information must be made within the Financial section.

If the client agrees to provide financial information, select the **Edit** button to answer **Client agrees to provide financial information** and pick **Yes**. Additional questions are revealed. Enter the household size using the dropdown in that field. Select the **Save** button.

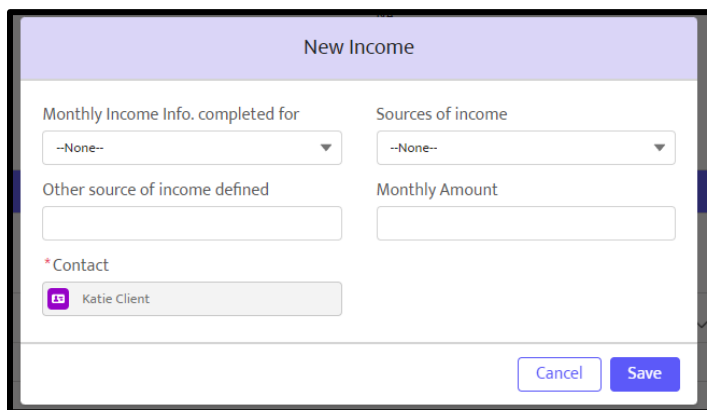


At the bottom of the page, there are three tabs: **Incomes**, **Assets**, and **Expenses**.



To Enter Income

Click on the **Income** tab then select the **New** button. A pop-up appears for you to enter the details of each source of income. Select **Save** and a new row of income appears in the list.



The **New Income** pop-up asks about income for each member of the household.

At the bottom of the **Income** tab, VIVÉ calculates the total monthly and annual income of the household.

If you need to add another source of income, click the **Income** tab and complete the **New Income** pop-up.

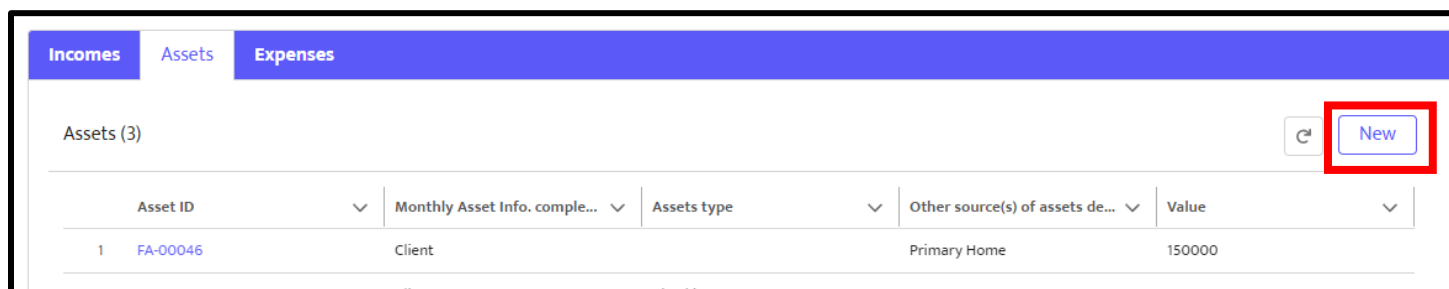
At the top of the page, there is a summary of the household size and its total annual income, total assets and total expenses. If you want to see the Poverty Levels chart, click the hyperlink underneath the **Poverty Level PDF** label.

To edit any of these details, click the **Income** tab then click the link for a source of income. That brings you to the details for that income source, those details can be edited by clicking any of the pencils. Select **Save** when finished and **Exit** to return to the top of the page.

NOTE: The Low Income Minority field pre-populates based on what is entered in the Social Demographics screen.

To Enter Assets

To enter assets click the **Assets** tab. To enter the type and value of an asset, select the **New** button.



The **New Asset** pop-up identifies the owner of the asset, its type and value.

The **Asset Total** is at the top of the financial form. If you need to edit any of the assets, click the **Asset ID** link and click any pencil.

To Enter Expenses

Select **New** to add an expense, or click on the **Expense ID** link to edit using the pencils. Expenses have a sub-type. For example, an expense type is housing, then **Sub-Type** can be rent.

To Delete Financial Information

If you need to delete financial information for a client, whether it's income, assets, or expenses you can click the down arrow on the righthand side of that row and select **Delete**. You may need to select **Refresh** on your screen to see that change.

Income ID	Monthly Income Info. complete...	Sources of income	Other source of income defined	Monthly Amount
1 HI-000102	Spouse	Social Security		900
2 HI-000101	Client	Dividends		150
3 HI-000100	Client	Rental Income		750
4 HI-000099	Client	Interest		500
5 HI-000098	Client	Social Security		200

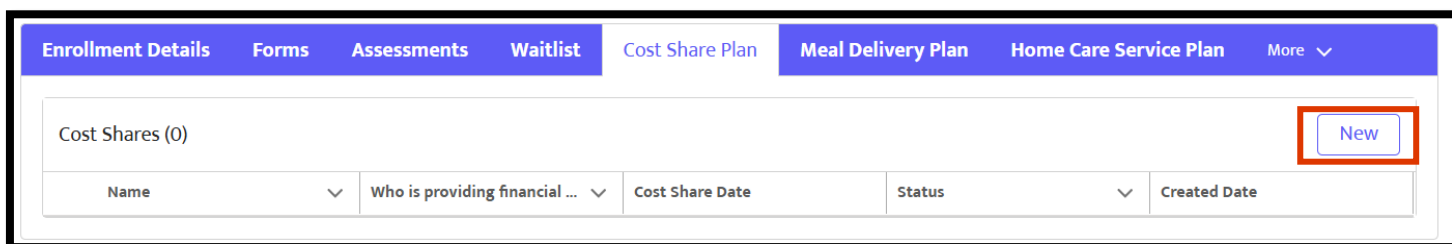
NOTE: Input each specific **Incomes, Assets** or **Expenses** source one at a time using the **New** button. In addition, you must input each household member's associated **Incomes, Assets** or **Expenses** separately.

Cost Share Plan

Creating a new Cost Share Plan

Step 1: Financial Information entered via **Details** section.

Step 2: Select the **New** button on the **Cost Shares** List View. Certain data from the **Financial** form is pre-populated.

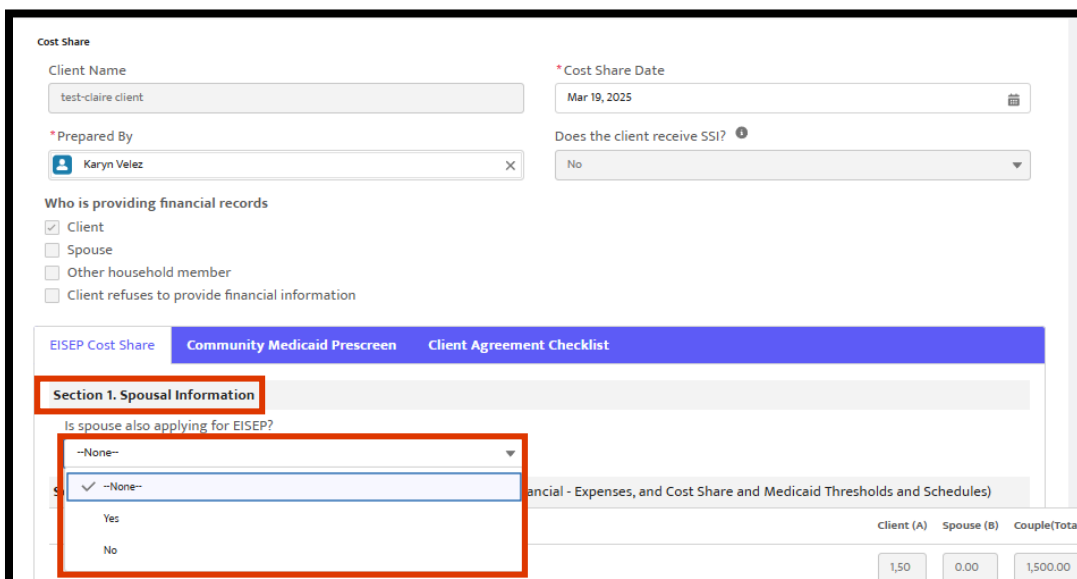


Step 3: Check who is providing this financial information and begin the first of three sub-sections.

EISEP Cost Share

The **EISEP Cost Share** form is divided into six sections – **Spousal Information, Monthly Income, Housing, Housing Adjustment, Cost Share** and **Monthly Contribution**.

Section 1. Spousal Information is an editable field, **Is spouse also applying for EISEP?**, is a dropdown menu with three responses – **None, Yes** and **No** – with the default being **None**.



If the cost for EISEP services calculated is for an individual without a spouse, the field choice does not need to be changed.

If the cost for EISEP services calculated is for a couple who are both applying for services, select the field choice **Yes**. This prompts a new field, **Name of Spouse**, to display. Then pick the spouse from the dropdown.

The screenshot shows the 'Cost Share' form with the following details:

- Client Name:** amber client
- * Cost Share Date:** Mar 19, 2025
- * Prepared By:** Karyn Velez
- Does the client receive SSI?:** No
- Who is providing financial records:**
 - Client
 - Spouse
 - Other household member
 - Client refuses to provide financial information
- Section 1. Spousal Information:**
 - Is spouse also applying for EISEP?:** Yes
 - Name of Spouse:** renny client
 - Other person(s) providing financial info:** (empty field)

If the cost for EISEP services calculated is for an individual whose spouse is not applying for services, select the choice **No**. This prompts a new field, **Non-applicant spouse income unavailable**, to display. Fill in the applicable amount of income that the non-applicant spouse is not able to share for their mutual benefit or the benefit of the client.

Section 2. Monthly Income has no editable fields. Fields are pre-populated with data from the **Incomes** and **Expenses** sub-tabs on the **Financial** form as well as other values associated with calculating an applicant(s) cost share. This is why the **Financial** form must be completed ahead of time.

Section 2. Monthly Income (Amounts auto-fill from Financials - Income, Financial - Expenses, and Cost Share and Medicaid Thresholds and Schedules)

Monthly Income Source	Client (A)	Spouse (B)	Couple(Total) (C)
2A. Total Social Security:	3,00	0.00	3,000.00
2A1. Medicare Part A Premium: ((Columns A & B auto-fill; Column C = A + B)	0.00	0.00	0.00
2A2. Medicare Part B Premium: ((Columns A & B auto-fill; Column C = A + B)	170.	0.00	170.00
2A3. Net Social Security: (Row 2A - Row 2A1 - Row 2A2); Note Part D Premium is not subtracted	2,83	0.00	2,830.00
2B. Pension/Retirement: (Columns A & B auto-fill; Column C = A + B)	0.00	0.00	0.00
2C. Interest: (Columns A & B auto-fill; Column C = A + B)	0.00	0.00	0.00
2D. Dividends: (Columns A & B auto-fill; Column C = A + B)	0.00	0.00	0.00
2E. Other income: (Columns A & B autofill; Column C = Sum of Rental Income, Salary/Wages, Self-employment, Other Income from Financials - Income form)	0.00	0.00	0.00
2F. Total Monthly Income: (Sum of Row 2A3 thru Row 2E)	2,83	0.00	2,830.00
2G. Non-applicant spouse's income unavailable for mutual needs: (Auto-fill)		0.00	
2H. Total Monthly Income for Cost Share: (Row 2F - Row 2G)	2,83		2,830.00
2I. Cost Share Monthly Income Threshold: (Auto-fill). If Row 2H is less than Row 2I, the Fee Rate is 0%	1,88		2,555.00

Section 3.

Housing has two editable fields, the remaining are pre-populated with data from the **Expenses** sub-tab on **Financial**. Add the associated value for each field as needed.

Section 3. Housing (Auto-fill amounts are from Financial - Expenses)

Monthly Housing Expenses	Total Amount (\$)
3A. Rent: (Auto-fill)	1,500.00
3B. Mortgage: (Auto-fill)	0.00
3C. Maintenance/Common Charge: (Auto-fill)	0.00
3D. Electricity: (Auto-fill)	100.00
3E. Gas: (Auto-fill)	50.00
3F. Oil: (Auto-fill)	0.00
3G. Water/Sewage: (Auto-fill)	0.00
3H. Telephone: Basic phone service only. No internet or data plans. Must choose cell or landline, not both. If no phone, enter 50	60.00
3I. Property Taxes: In NYC school taxes are part of property tax	0.00
3J. Other: Keeps home physically habitable such as snow/garbage removal, yard cleaning, etc. If no other expenses, enter 50	10.00
3K. Monthly Housing Expense (Average Total): (Sum of Rows 3A thru 3J)	1,720.00

Section 4.

Housing Adjustment has no editable fields. Fields are pre-populated with values associated with calculating an applicant(s) cost share.

Section 4. Housing Adjustment (Auto-fill amounts are from Cost Share and Medicaid Thresholds and Schedules)

Housing Adjustment	Client (A)
4A. Housing Adjustment Threshold: (Auto-fill)	753.
4B. Excess Housing Expenses: (Row 3K - Row 4A). If the Housing Adj. Threshold (Row 4A) is greater than the Monthly Housing Exp. (Row 3K), client is not eligible for a housing adj.	967.
4C. Net Monthly Income: (Row 2H) (Auto-fill)	2,83
4D. Housing Adjusted Amount: (Either Row 4A or 4B, whichever is less)	753.
4E. Net Monthly Income Minus Excess Housing Expenses (Row 4C - Row 4D)	2,07
4F. Monthly Income Threshold: (Auto-fill)	1,88
4G. Adjusted Monthly Income (Maximum Monthly Fee): (Row 4E - Row 4F)	194.

Section 5. Cost Share has two required fields, **Service Type** and **Authorized Weekly Units**. The

remaining fields are pre-populated with values associated with calculating cost share. Use the dropdown arrows to pick the choice that corresponds with the client’s care plan.

Section 5. Cost Share (Auto-fill amounts are from client’s care plan/service plan)

Service Type *	Auth. Weekly Units *	Estimated Monthly Units	Unit Cost	Monthly Cost
Homemaker/Personal Care	8	34.40	28.50	980.40
Monthly Cost Calculation				Total Amount (\$)
5B. Total Monthly Cost for Authorized Services: (Row 5A, Column E) (Auto-fill)				980.40
5C. Fee Rate %				15.00%
5D. Monthly Fee: (Row 5B x Row 5C)				147.06
5E. Maximum Monthly Fee: (Row 5B)				980.40
5F. Monthly Cost Share: (Either Row 5D or 5E, whichever is less. also if less amount is negative, then it will be converted to "Zero")				147.06

Section 6. Monthly Contribution has no required fields. The field is pre-populated with a value associated with cost share contribution amounts.

Section 6. Monthly Contribution A contribution is requested ONLY from clients who do not pay a cost share.

Requested Monthly Contribution (Per Hr. Home Care Rate x Estimated Monthly Units): 49.02

If the client is in receipt of Supplemental Security Income (SSI), they are not eligible for EISEP services because they are recipients of Medicaid. The **EISEP Cost Share** form, therefore, will note **No items to display**.

Cost Share

Client Name: Alfred client

*Cost Share Date: Mar 19, 2025

*Prepared By: Karyn Velez

Does the client receive SSI?: Yes

Who is providing financial records:

- Client
- Spouse
- Other household member
- Client refuses to provide financial information

Tabs: EISEP Cost Share | Community Medicaid Prescreen | Client Agreement Checklist

No items to display

Buttons: Cancel, Save, Mark Complete

Community Medicaid Prescreen

Click the **Community Medicaid Prescreen** sub-tab to display the form with two editable fields and three sections – **Resources**, **Income** and **Monthly Medical Expenses**.

When completing the **Any apply client's household** field select the desired choice from the list in the **Available** field and use the right-pointing arrow to move the choice to the **Chosen** field. To move the item back, choose the list choice again and select the left-pointing arrow. **NOTE: If the Any apply client's household field is edited, the Community Medicaid Prescreen will not be completed. Consult the NYC Human Resources Administration if you believe the client is eligible for Medicaid.**

Cost Share

Client Name: gena client

*Cost Share Date: Mar 19, 2025

*Prepared By: Karyn Velez

Does the client receive SSI?: No

Who is providing financial records:

- Client
- Spouse
- Other household member
- Client refuses to provide financial information

Tabs: EISEP Cost Share | Community Medicaid Prescreen | Client Agreement Checklist

Any apply client's household?

Available:

- Household includes one or more persons in addition to the client and spouse
- Client is under age 65 and is not disabled

Chosen:

Who lives in this household?: Client and Spouse

Buttons: Move selection to Chosen

Section 1. Resources has no editable fields. Fields are pre-populated with data from the **Assets** and **Expenses** sub-tabs on the **Financial** form as well as other values associated with screening for Medicaid financial eligibility.

Section 2. Income has no editable fields. Fields are pre-populated with data from the **Incomes** and **Expenses** sub-tabs on the **Financial** form as well as other values associated with screening for Medicaid financial eligibility.

Section 3. Monthly Medical Expenses has no editable fields. Fields are pre-populated with data from the **Expenses** sub-tab on the **Financial** form as well as other values associated with screening for Medicaid financial eligibility.

If the client is in receipt of Supplemental Security Income (SSI), they are already in receipt of Medicaid. The **Community Medicaid Prescreen** form therefore, will note **No items to display**.

Client Agreement Checklist

Click the **Client Agreement Checklist** sub-tab to display the form with four editable fields.

When completing the **Part of EISEP Client Agreement?** field select the desired choice from the list in the **Available** field and use the right-pointing arrow to move the choice to the **Chosen** field. To move the item back, choose the list choice again and select the left-pointing arrow. For the field, **Client approves care plan and cost share** use the arrow on the dropdown menu to pick either **Yes** or **No**. If **No** is chosen, provide an explanation for why the client declined the plan in the **Comment** box. Use the calendar icon or type in the date in the **Date Client Agreement Signed** field.

NOTE: If the client is in receipt of Supplemental Security Income (SSI), they already receive Medicaid, so there is no need to complete the **Client Agreement Checklist** form.

Mark Complete

At the bottom of each of these sections, EISEP, Cost Share, Community Medicaid Prescreen and Client Agreement Checklist, there are three buttons: **Cancel**, **Save**, and **Mark Complete**.



- **Cancel** exits you from the form, returns you to the **Cost Shares** List View, and does not save your data.
- **Save** returns you to the **Cost Shares** List View, saves any entries from any sub-sections and the cost share is in **Draft** status.
- **Mark Complete** opens the **Confirm Mark Complete** pop-up. Select **Yes** if all sub-sections are completed. You return to the **Cost Shares** List View and the cost share will have a status of **Complete** and is ready to use in the **Home Care Service Plan** referral process.

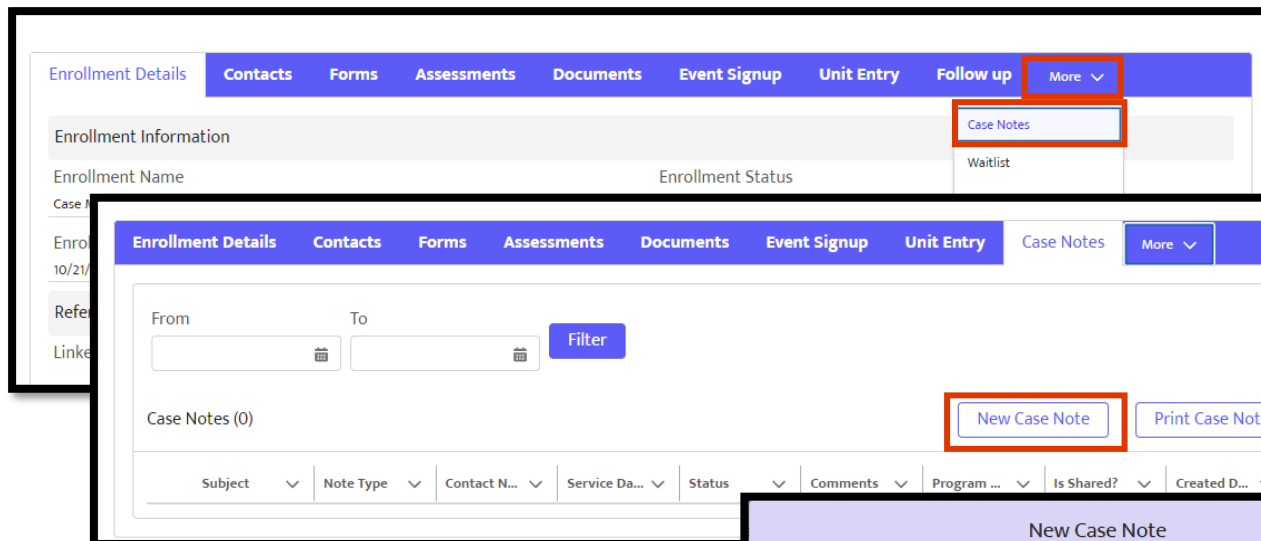
NOTE: A new Cost Share cannot be created if a Cost Share is listed in **Draft** status. The error message, “**Cost share already exists in draft status**” appears and you cannot complete the process. A new Cost Share can only be completed when previous Cost Shares are listed in **Completed** or **Inactive** status.

Summary & Care Plan Notes

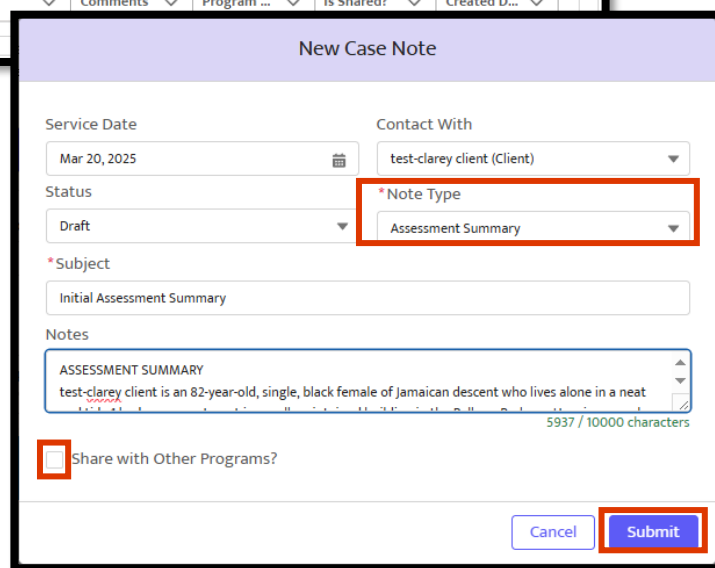
The **COMPASS Summary** (assessment, reassessment or event-based) and associated **Care Plan Notes** are a **Note Type** option that can be documented in **Case Notes**. What follows are the navigational instructions for inputting this data into **Case Notes**.

Adding a Summary & Case Note

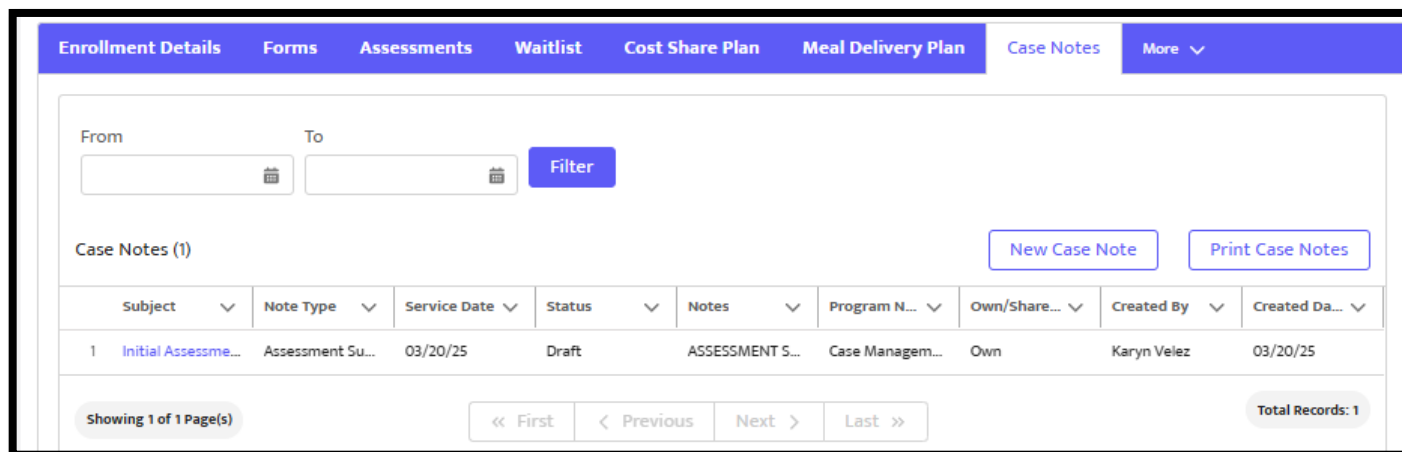
Step 1: On **Enrollment Details Menu** select the **Case Notes** tab. If you do not see the tab, select **More** and choose **Case Notes** from the dropdown menu. The **Case Notes** List View provides the ability to add notes, print notes and find specific notes using the **Filter** button.



Step 2: The **New Case Note** pop-up displays fields pre-populated with the current date, the client’s name and the note status of **Draft**. Select the dropdown arrow for **Note Type** to choose **Assessment Summary**, enter a **Subject** heading and type in or copy and paste the summary in the **Notes** box which allows up to 10,000 characters. If you want other programs to see the note, click the **Share with Other Programs?** checkbox. Then select **Submit**.

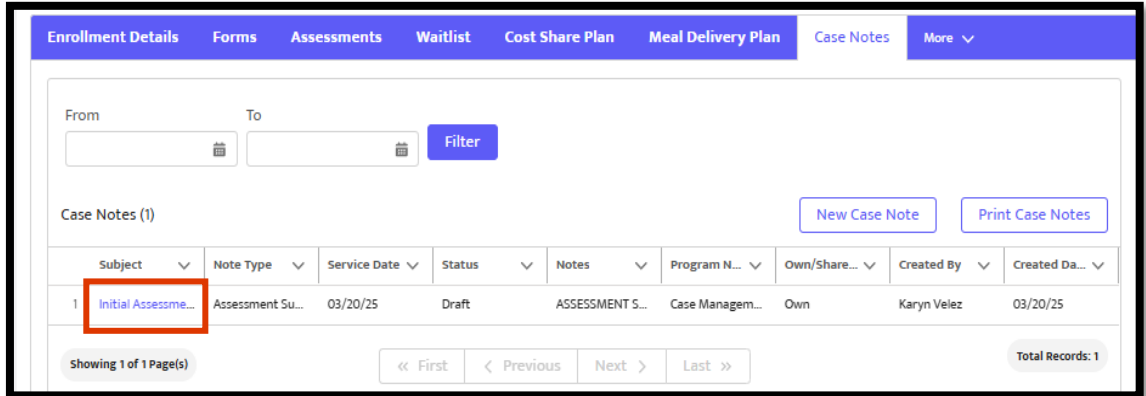


You return to the **Case Notes** List View where pertinent information about the note is displayed such as its **Status** and if it has been shared with other programs or only accessible by your program. The note remains in **Draft** status until it is either determined **Final** or **Inactive**.

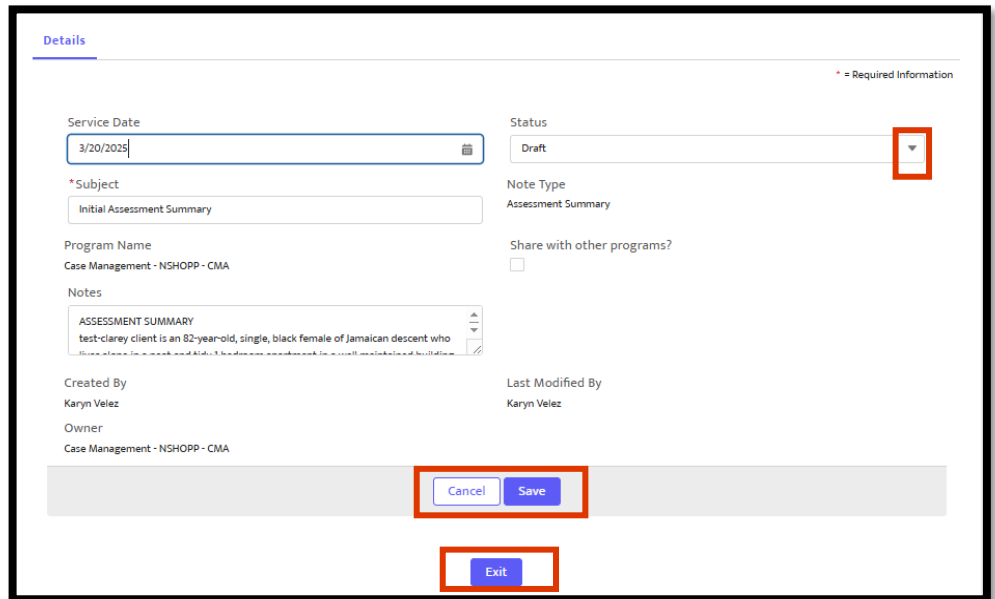


Editing a Case Note

Step 1: On the **Case Notes** List View, select the **Subject** link. The note's **Details** form displays with the written note in its entirety as well as other note details which are not editable.



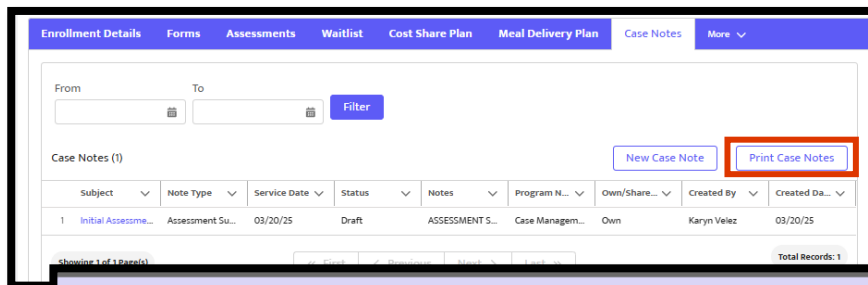
Step 2: Select any pencil icon. The **Details** form displays dropdown menus and text fields that can be edited. The **Cancel**, **Exit** and **Save** buttons also display. Selecting **Cancel** removes you from the editable form and brings you back to the original **Details** note form. **Exit** returns you to the **Case Notes** list view without any saved edits. **Save** returns you to the original **Details** form with all edit updates and once reviewed, you can return to the **Case Notes** list view by using the **Exit** button at the bottom of this form.



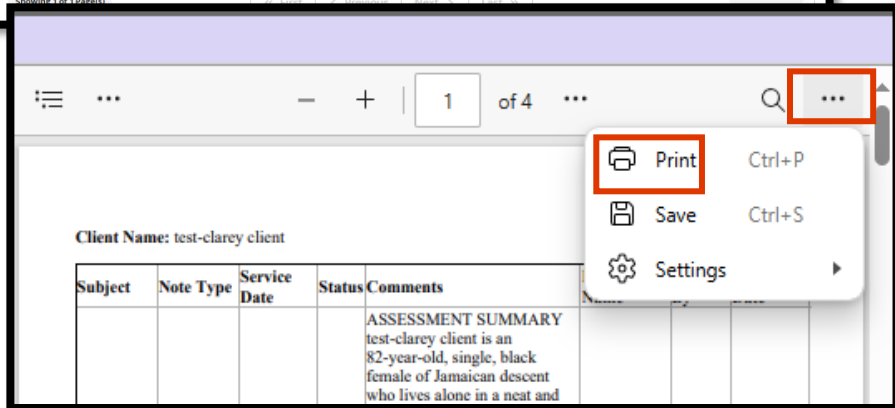
A note in **Draft** status can continue to be edited. A note in **Final** status cannot be edited in the future and any attempts to edit the note, after **Save** is selected, prompts the error message, **We hit a snag**, stopping the process. You can also change the status of the Note to **Inactive** by picking this action from the **Status** dropdown menu.

Printing a Case Note

Step 1: Select **Print Case Notes** on the **Case Notes** List View. A pop-up displays with the print preview for the note.



Step 2: Select the 3-dots at the top right of the window to access the dropdown menu selection. Choose **Print**. Exit the pop-up and return to the **Case Notes** List View.



TIPS: The **Care Plan Issues/Goals** form is not yet available in VIVÉ. **Create one Care Plan Note** that address all services/needs within the **Case Notes** tab under the **Note Type**, “**Care Plan.**”

To create a **Care Plan Note**, here are some “best practice” guidelines of what to include:

- Outline specific services or needs to address
- Provide service units where applicable
- Clearly state that the plan was discussed with the client or informal support and was accepted

Client Example – Ms. Freeze:

Due to limited mobility and chronic pain, Ms. Freeze is unable to safely perform grocery shopping and meal preparation. She reports minimal informal support. Ms. Freeze will maintain adequate nutrition and continue living safely in the community. She also requested help to apply for SNAP benefits as she is eligible for them.

Care Plan:

- *HMDL: 5 days per week, hot meals to support nutritional needs.*
- *HMPC: 4 hours X 5 days a week to assist with essential grocery shopping and ADLs.*
- *Case Management: Follow up phone calls every 2 months to monitor service.*
- *SNAP Benefits: Assist with the application for SNAP at Ms. Freeze’s request.*
- *Reassessment: To be completed within 365 days.*
- *This Care Plan was discussed with Ms. Freeze, and she agreed with the plan.*

Meal Delivery, Home Care & Friendly Visiting Service Plans

There are three service plans in VIVÉ: **Meal Delivery Plan**, **Home Care Service Plan** and **Friendly Visitor Service Plan**. Access them from the **Enrollment Details Menu**. If a tab is not visible, select **More** and choose it from the dropdown menu.

Meal Delivery Service Plan

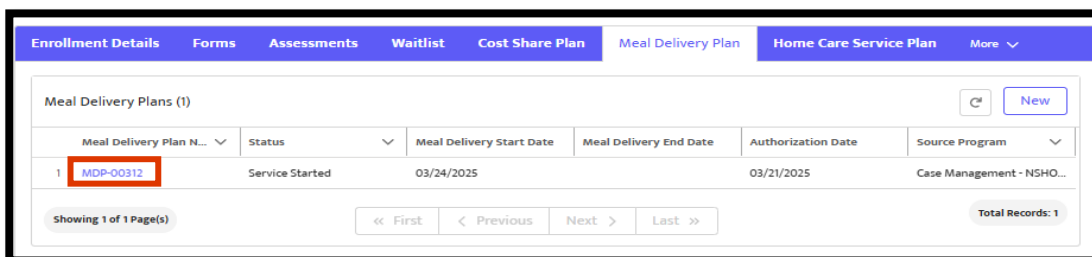
Discussion of how to create an initial **Meal Delivery Plan** can be found in the **CMA/HDM Intake/PEC Meal** section of this guide

Putting a Meal Delivery Plan on Hold

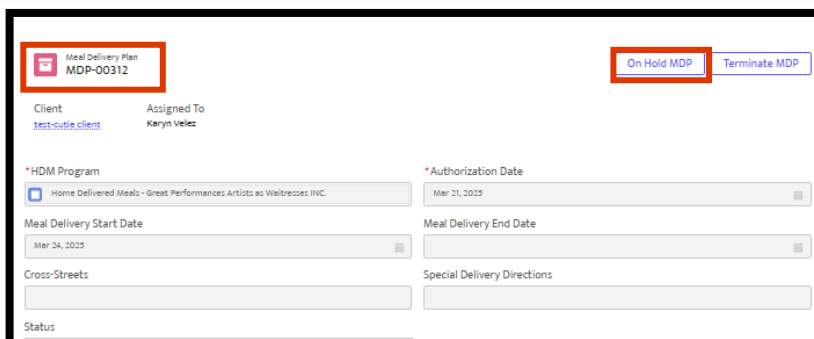
We will now focus on how to put meals on hold and terminate the meal delivery service plan.

Any **Meal Delivery Plan** started by the home delivered meals program can be placed **On Hold**. To place services **On Hold**:

Step 1: Click the **Meal Delivery Plan** tab on **Enrollment Details Menu**. Click the **Meal Delivery Name** link.

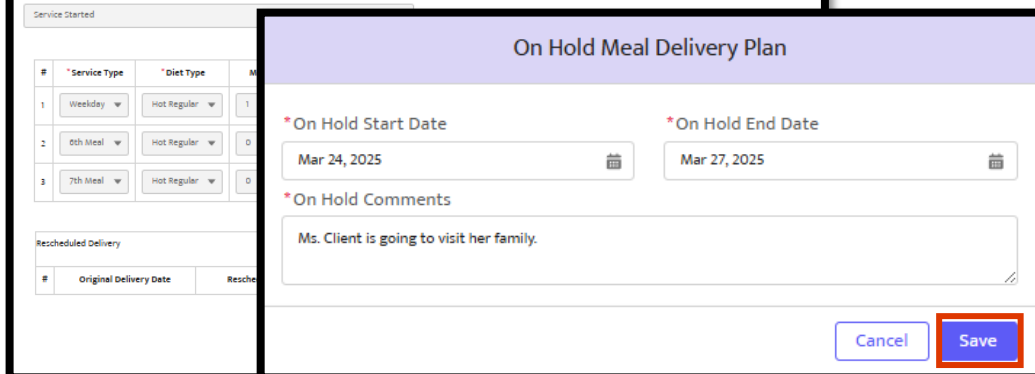


Step 2: On the **Meal Delivery Plan** details, select **On Hold MDP** from the upper right corner.



Step 3: The **On Hold Meal Delivery Plan** pop-up displays. Complete all the fields and select **Save**.

You return to the service plan where the **On Hold** dates notification displays. VIVÉ automatically sends an email to the meal provider alerting them to this request.



VIVÉ Knowledge Base – Case Management Programs

The service plan form now has an **Edit on Hold** button available. The On Hold request can be edited any time before or during the requested timeframe by selecting the **Edit on Hold** button.

This Meal Delivery Plan is scheduled to be **On Hold** from 3/24/2025 to 3/27/2025

Meal Delivery Plan MDP-00312

Client: test-cutie.client | Assigned To: Karyn Velez

*HDM Program: Home Delivered Meals - Great Performances Artists as Waitresses INC. | *Authorization Date: Mar 21, 2025

Meal Delivery Start Date: Mar 24, 2025 | Meal Delivery End Date: [Empty]

Buttons: Terminate MDP, Edit On Hold

Editing an On Hold Request

Step 1: From the **Meal Delivery Plan** page, select **Edit on Hold** button.

Step 2: From the **Edit On Hold Meal Delivery Plan** pop-up, make edits, then select **Save**. If the request needs to be cancelled prior to the start date, select the **Remove on Hold** button. You return to the **Meal Delivery Plan** form where the On Hold request notification is now removed and the **On Hold MDP** button returns. Select **Cancel** to return to the **Meal Delivery Plan** List View.

Edit On Hold Meal Delivery Plan

*On Hold Start Date: Mar 24, 2025 | *On Hold End Date: Mar 27, 2025

*On Hold Comments: Ms. Client is going to visit her family.

Buttons: Remove On Hold, Cancel, Save

Meal Delivery Plan MDP-00312

Client: test-cutie.client | Assigned To: Karyn Velez

*HDM Program: Home Delivered Meals - Great Performances Artists as Waitresses INC. | *Authorization Date: Mar 21, 2025

Meal Delivery Start Date: Mar 24, 2025 | Meal Delivery End Date: [Empty]

Buttons: On Hold MDP, Terminate MDP

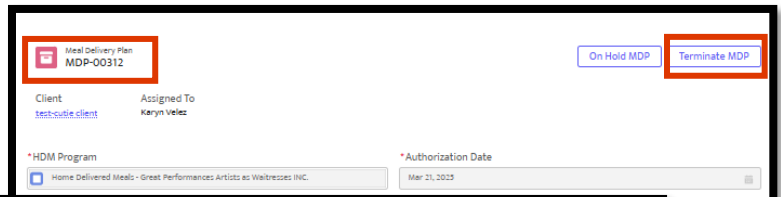
Terminating a Meal Delivery Plan

Step 1: From the **Enrollment Details** menu, click **Meal Delivery Plan** tab. Click the **Meal Delivery Plan** number link.

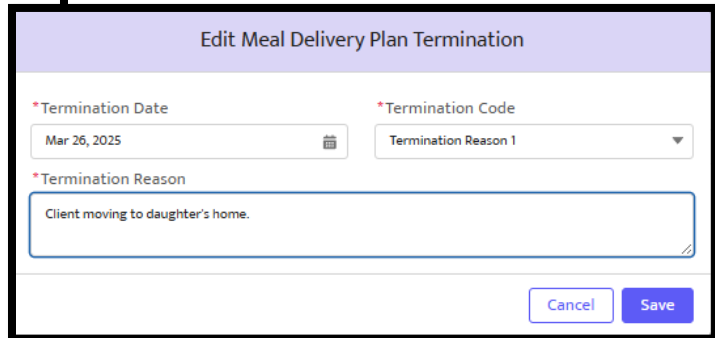
Meal Delivery Plan N...	Status	Meal Delivery Start Date	Meal Delivery End Date	Authorization Date	Source Program
1 MDP-00312	Service Started	03/24/2025		03/21/2025	Case Management - NSHO...

Showing 1 of 1 Page(s) | Total Records: 1

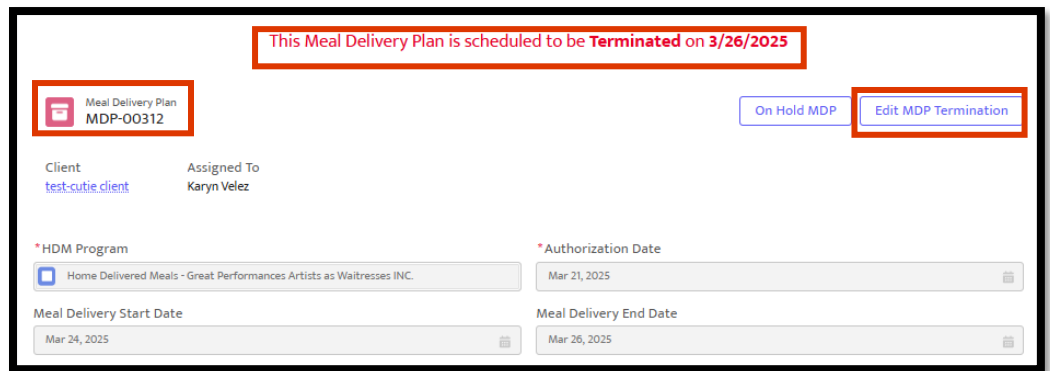
Step 2: From the **Meal Delivery Plan** details page, select **Terminate MDP**.



Step 3: From the **Edit Meal Delivery Plan Termination** pop-up enter a future termination date, pick a **Termination Code**, and enter a **Termination Reason** before selecting **Save**.

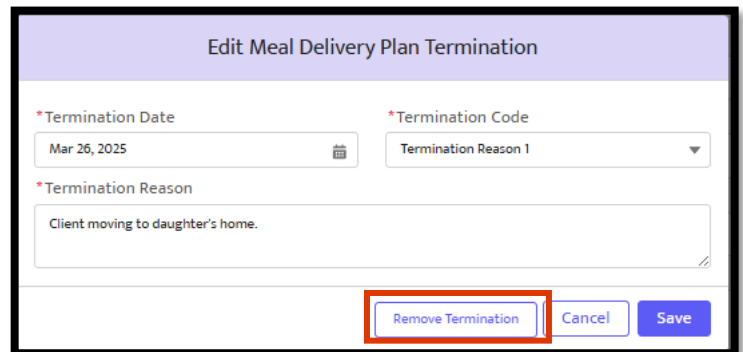


You return to the service plan where the termination date notification is displayed. VIVÉ automatically sends an email to the home care provider alerting them to this request. The service plan form displays the termination date in the **Meal Delivery End Date** field and an **Edit MDP Termination** button is now available.



The termination request can be edited or voided any time before the stated date of termination.

Select **Edit MDP Termination**. Make any necessary edits. To void the request, on the pop-up, select **Remove Termination**. Using the check box on the **Remove Termination** pop-up, confirm that the termination is to be voided and select **Save**.



You return to the **Meal Delivery Plan** form where the **On Hold MDP** and **Terminate MDP** buttons now display. Select **Cancel** to return to the **Meal Delivery Plan List View**. VIVÉ automatically sends an email to the home care provider alerting them to this change.



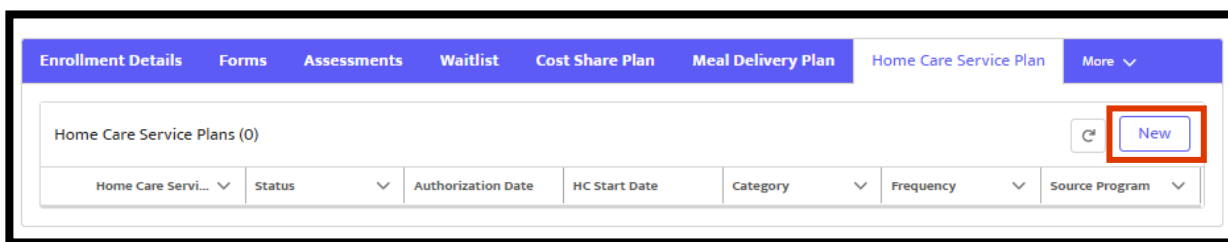
If a termination occurs and the client would like to resume services, a new **Meal Delivery Plan** and referral would need to be created.

Home Care Service Plan

The **Home Care Service Plan** tab enables you to create a service plan and send that referral to your designated **Home Care** provider.

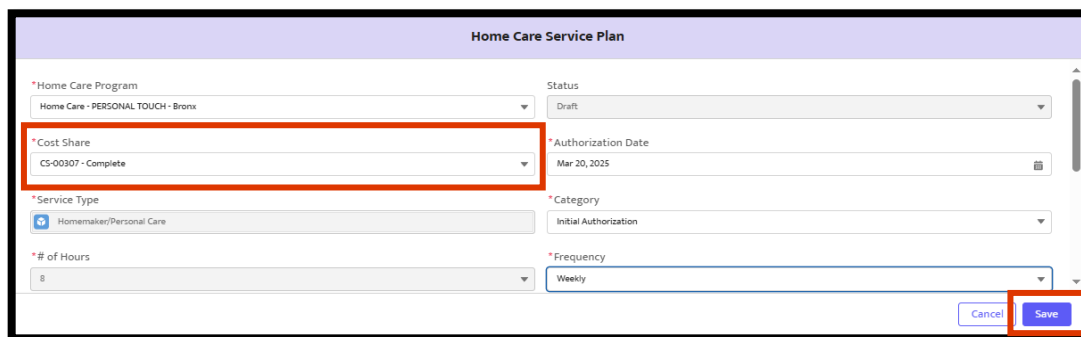
Initial Activation of Home Care Service Plan

Step 1: From the **Enrollment Details** menu, click the **Home Care Service Plan** tab, select the **New** button.



NOTE: If **New** is selected and a **Cost Share Plan** is not completed, an error notification appears prompting you to first complete the cost share before creating a service plan for home care.

Step 2: From the **Home Care Service Plan** use the dropdown to pick the client's **Cost Share**. This populates the fields **Service Type**, **Number of Hours**, **Cost Share**



Monthly Amount and **Contribution Rate Per Hour** (if applicable) or **Contribution Rate Per Hour**. Confirm that all required fields are completed before selecting **Save**.

NOTE: *Meal Delivery and Home Care Service cannot be referred from the "Client Profile" level because each service needs a service plan once the client is enrolled in your program.*

Referring Home Care Service

Step 1: From the **Enrollment Details** menu, click the **Home Care Service Plan** tab, then click the desired **Home Care Service Plan ID** link.

Step 2: On the draft plan, which is editable, select the **Create Referral** button in the upper right corner.

Step 3: The **Client Referral Form** pop-up displays with pre-populated fields and an editable **Comments** text box. Add any necessary comments and select **Save**.

NOTE: If a Consent to Share/Refer is not completed, the system prompts you to complete one prior to saving. You return to the draft plan where an alert regarding the successful sharing of the plan with the home care provider displays and you no longer see the **Create Referral** button.

The plan remains in **Draft** status until the home care program decides if the plan is accepted or not. Once the service plan is started by the home care program, the plan's status changes to **Service Started**.

TIP: To confirm that your referral was sent, check the **Referral Queue** with the filter **Referrals Shared by my Program**. See above instructions: *Best Practice, Confirm Referral is Sent*

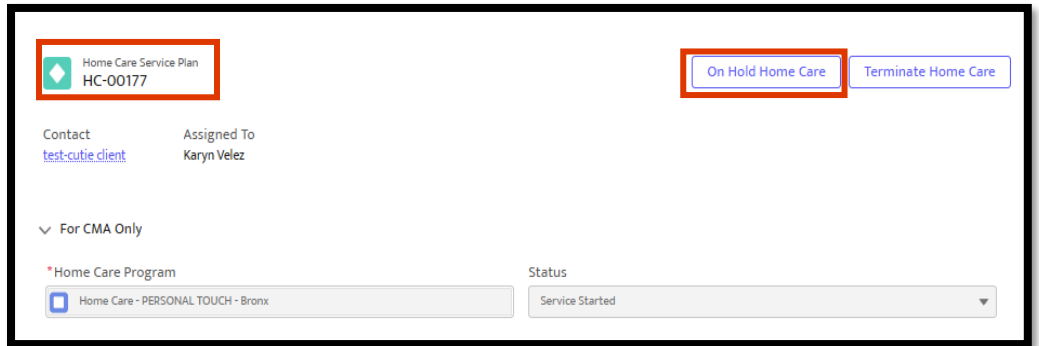
Requesting a Service Plan to be Placed On Hold

Any **Home Care Service Plan** started by the home care program, can be placed **On Hold**. To place services **On Hold**:

Step 1: From the **Enrollment Details** menu, click the **Home Care Service Plan** tab, click the desired **Home Care Service Plan ID** link.

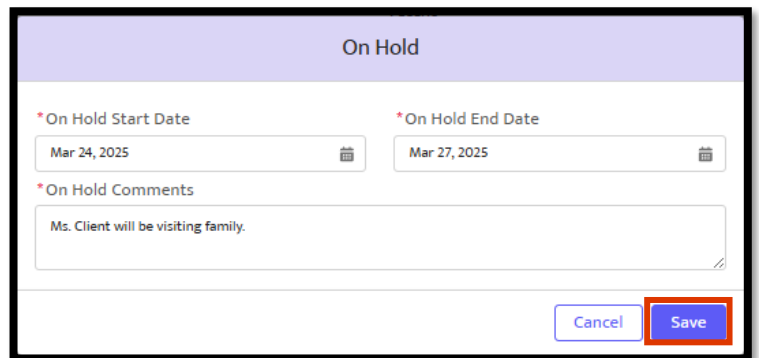
VIVÉ Knowledge Base – Case Management Programs

Step 2: On the **Home Care Service Plan** details page in the upper right corner there are two buttons: **On Hold Home Care** and **Terminate Home Care**. Select **On Hold Home Care**.



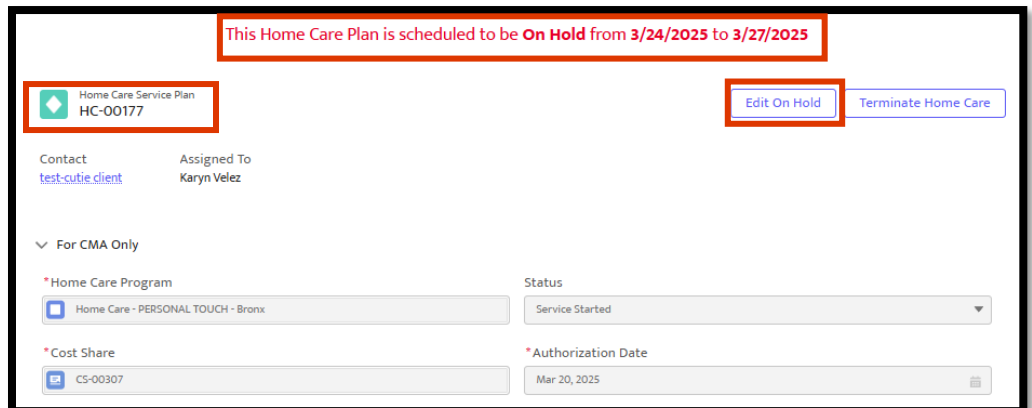
The screenshot shows the 'Home Care Service Plan' details page for plan ID HC-00177. The plan is assigned to Karyn Velez and is currently in 'Service Started' status. The 'On Hold Home Care' button is highlighted with a red box, indicating it is the next step in the process.

Step 3: The **On Hold** pop-up displays. Complete all required fields and select **Save**. You return to the service plan where the requested dates are displayed. VIVÉ automatically sends an email to the home care provider alerting them to the request.



The 'On Hold' pop-up form is displayed. It contains fields for 'On Hold Start Date' (Mar 24, 2025), 'On Hold End Date' (Mar 27, 2025), and 'On Hold Comments' (Ms. Client will be visiting family). The 'Save' button is highlighted with a red box.

The service plan form now has an **Edit on Hold** button available. The **On Hold** request can be edited any time before or during the requested timeframe.



The screenshot shows the 'Home Care Service Plan' details page after the 'On Hold' request has been saved. A red box highlights the text: 'This Home Care Plan is scheduled to be On Hold from 3/24/2025 to 3/27/2025'. The 'Edit on Hold' button is also highlighted with a red box.

Editing an On Hold Request

Step 1: Select **Edit on Hold** to open the **On Hold** pop-up. Edits can be made to any of the required fields before selecting **Save**.

If the request needs to be cancelled prior to the start date, select the **Remove on Hold** button. You return to the **Home Care Service Plan** form where the On Hold request notification is now removed and the **On Hold Home Care** button returns.

Terminating Home Care Services

Step 1: From the **Enrollment Details** menu, click the **Home Care Service Plan** tab, click the desired **Home Care Service Plan ID** link.

Step 2: On the **Home Care Service Plan** details page select **Terminate Home Care**.

Step 3: A pop-up displays. Complete all required fields. For the **Termination Code** select from the dropdown menu. Select **Save** when completed.

You return to the service plan where the termination date is displayed. VIVÉ automatically sends an email to the home care provider alerting them to the termination. The service plan form now has an **Edit Home Care Termination** button available.

Edit Home Care Termination

The termination request can be edited any time before the stated date of termination.

Step 1: On the **Home Care Service Plan** details page, select **Edit Home Care Termination**.

Step 2: On the pop-up, select **Remove Termination**.

Step 3: On the **Remove Termination** pop-up, confirm that the termination is voided and select **Save**.

You return to the **Home Care Service Plan** form where the **On Hold Home Care** and **Terminate Home Care** buttons displays. Select **Cancel** to return to the **Home Care Service Plans** List View. VIVÉ automatically sends an email to the home care provider alerting them to this change.

*Termination Date: Apr 1, 2025
*Termination Code: Client moved out of the service area
*Termination Reason: Ms. Client will now be moving in with her daughter in Maine
Buttons: Remove Termination, Cancel, Save

Remove Termination
 Are you sure you would like to remove the Home Care Service Plan Termination Date which is set in future?
Buttons: Cancel, Save

If the termination occurs and the client would like to resume services, a new **Home Care Services Plan** and referral need to be created.

TIP: To ensure the Home Care Service Program’s notation regarding the termination of services is in sync with your program’s it is suggested that a separate email be sent to the home care service program with the specifics regarding the **Termination Code** and **Termination Reason**.

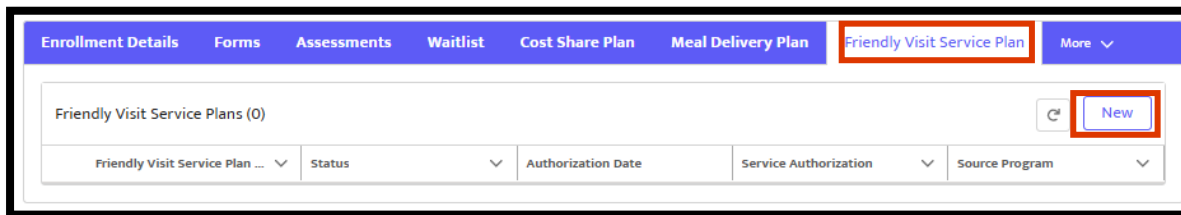
Friendly Visiting Service Plan

The **Friendly Visiting Service Plan** enables you to create a service plan and send that referral to your designated **Friendly Visiting** provider.

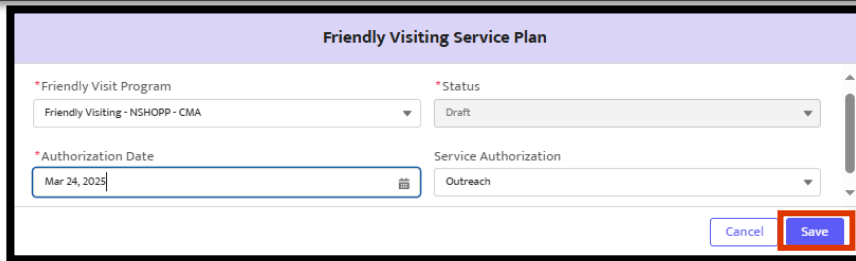
NOTE: Referrals for friendly visiting services must **only** be sent via the **Referrals** tab on the **Enrollment** level. Referrals sent from the “Client Profile” level do not generate the **Friendly Visiting Service Plan** needed by the friendly visiting program to provide services to the client.

Initial Activation of Friendly Visiting Service Plan – Enrollment Level

Step 1: From the **Enrollment Details** menu, click on the **Friendly Visiting Service Plan** tab. A List View displays. Select **New**.



Step 2: The **Friendly Visiting Service Plan** pop-up displays. Confirm that all required fields are completed before selecting **Save**.

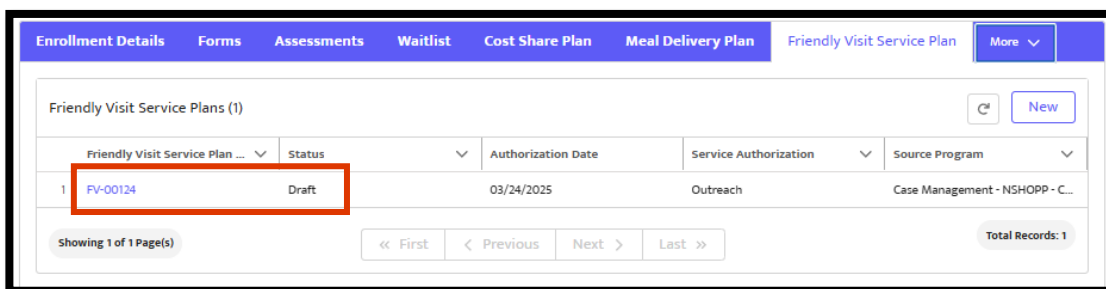


You return to the **Friendly Visiting Service Plan** List View where pertinent information displays, including the status of **Draft**.

NOTE: *If a Consent to Share/Refer is not completed, the system prompts you to complete one prior to saving. You return to the Referrals list view where the referral is noted as sent. The system automatically sends an email to the friendly visiting program regarding the request.*

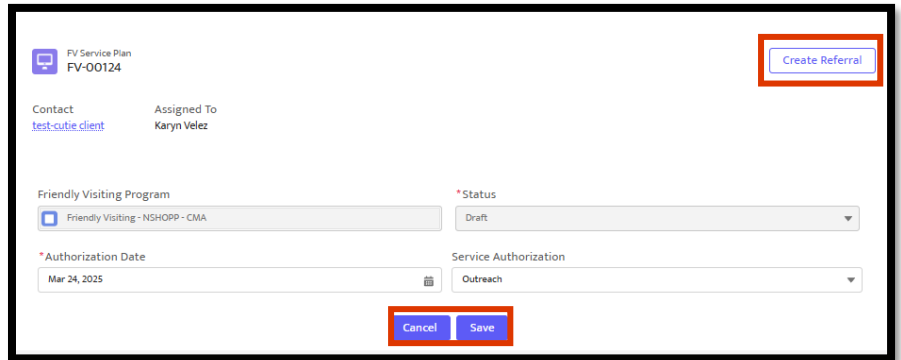
Referring the Friendly Visiting Service Plan

Step 1: From the **Enrollment Details** menu, click on the **Friendly Visiting Service Plan** tab. Click on a draft **Friendly Visiting Service Plan Name** number link.



VIVÉ Knowledge Base – Case Management Programs

Step 2: The draft plan, which is editable, displays **Cancel**, **Save** and **Create Referral** buttons. Selecting **Cancel** brings you back to the List View. You select **Save** only if you have made edits to the form and are not ready to send the referral. This action also returns you to the List View. When you are ready to send the referral, select **Create Referral**.

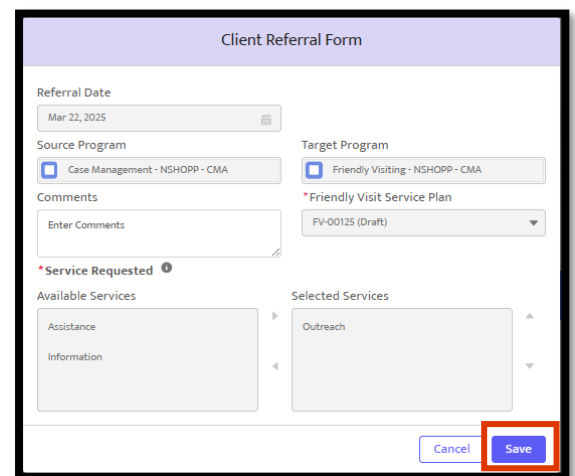


The screenshot shows a form for a 'FV Service Plan' with ID 'FV-00124'. It includes fields for 'Contact' (test-cutie client) and 'Assigned To' (Karyn Velez). The 'Friendly Visiting Program' is set to 'Friendly Visiting - NSHOPP - CMA' and the 'Status' is 'Draft'. The 'Authorization Date' is 'Mar 24, 2025' and 'Service Authorization' is 'Outreach'. A 'Create Referral' button is highlighted in the top right, and 'Cancel' and 'Save' buttons are at the bottom.

Step 3: The **Client Referral Form** pop-up displays with pre-populated fields and an editable **Comments** text box. Add any necessary comments and select **Save**.

NOTE: If a *Consent to Share/Refer* is not completed, the system prompts you to complete one prior to saving.

You return to the draft plan and no longer see the **Create Referral** button.



The screenshot shows the 'Client Referral Form' pop-up. It includes fields for 'Referral Date' (Mar 22, 2025), 'Source Program' (Case Management - NSHOPP - CMA), and 'Target Program' (Friendly Visiting - NSHOPP - CMA). There is a 'Comments' text box and a 'Service Requested' dropdown set to 'Friendly Visit Service Plan'. Below are 'Available Services' (Assistance, Information) and 'Selected Services' (Outreach). 'Save' and 'Cancel' buttons are at the bottom right.

TIP: To confirm that your referral was sent, check the **Referral Queue** with the filter **Referrals Shared by my Program**. See above instructions: *Best Practice, Confirm Referral is Sent*

If the referral is acknowledged or accepted by the friendly visiting program, the update reflects on the **Referral Queue** list **Referrals shared by my Program**. If the referral is rejected, VIVÉ automatically sends an email on the friendly visiting program's behalf regarding the referral rejection.

New York City De... Sandbox: Referral Rejected Sun 3/23/2025 2:47 ... 188 KB
Hello, A referral for "test-joe client (0999001521)" has been rejected from "Friendly Visiting - NSHOPP - CMA". Regards, NYC Aging - VIVÉ <end>

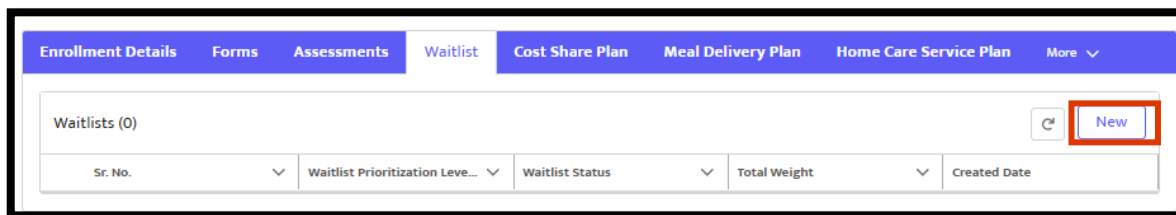
NOTE: Once the Friendly Visiting Service Plan is accepted and starts service for the client, you cannot place the service on hold or terminate the service. Those actions now become the responsibility of the friendly visiting program. Therefore, if you go to the Friendly Visiting Service Plan form for a client in receipt of these services, it is read-only.

Other Program Actions

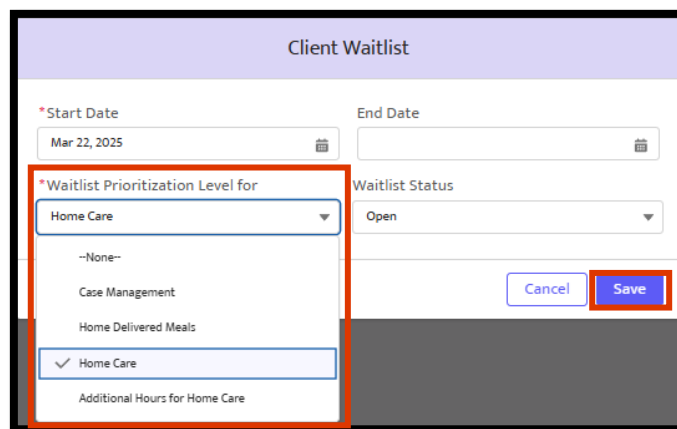
Waitlist

The Waitlist tab provides you with the ability to place a client on the waiting list for **Assessment**, **Home Delivered Meals**, **Home Care** and **Additional Hours for Home Care**. To place a client on the **Waitlist** for services:

Step 1: From the **Enrollment Details** menu, click the **Waitlist** tab. A List View displays. Select the **New** button.



Step 2: The **Client Waitlist** pop-up displays. Pick the service that the client is waiting for from the **Waitlist Prioritization Level** dropdown menu. Confirm that all required fields are completed before selecting **Save**.



The **Waitlist** form opens with pre-populated data drawn from various sections of the **COMPASS** and the **Emergency Preparedness** sub-tab on the **Details** level. The field, **Total Weight**, shows a value of zero.

Three buttons are available, **Edit**, **Re-calculate**, at the top of the form, and **Exit** at the bottom of the form.

Step 3: Select **Re-calculate** for the client’s waiting list score. Select **Exit** to return to the **Waitlist** List View which displays information about the client’s waiting list status.

The screenshot shows the 'Client Waitlist' form for client WL-00081. At the top right, there are 'Edit' and 'Re-calculate' buttons. The form includes fields for 'Start Date' (Mar 22, 2025) and 'End Date'. Below these are dropdown menus for 'Waitlist Prioritization Level for' (set to 'Home Care') and 'Waitlist Status' (set to 'Open'). A 'Total Weight' field shows a value of '0'. The form is divided into several assessment sections: 'IADLS' (with checkboxes for Unmet Needs like Shopping, Laundry, Prepare & Cook Meals, Use Transportation, Housework/cleaning), 'ADLS' (with checkboxes for Unmet Needs like Bathing, Transferring, Personal Hygiene, Eating, Mobility, Dressing, Toileting), 'Informal and Formal Supports' (with checkboxes for family help and informal support received), 'NSI' (with a checkbox for weight change), 'Assistive Devices' (with checkboxes for wheelchair dependent and Walker), and 'Emergency preparedness'.

Editing the Waitlist

Step 1: From the **Enrollment Details** menu, click on the waitlists identification number link to bring you to the **Waitlist** form.

Step 2: From the Waitlist details page, select **Edit**.

Step 3: On the **Edit Waitlist** pop-up make all necessary edits. Select **Save**.

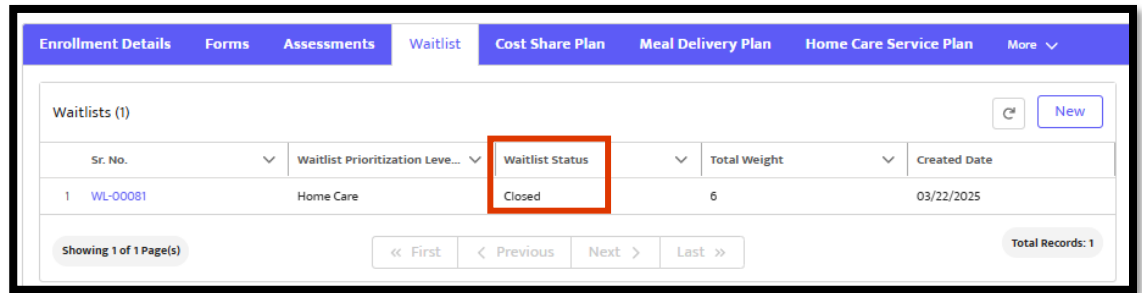
If the waitlisted service is now available for the client to receive, enter an **End Date** and change the **Waitlist Status** to **Closed**.

You are notified that the change is successful, and you return to the **Waitlist** form where you can select **Exit**.

The screenshot shows the 'Edit Waitlist' pop-up form. It has a purple header and contains fields for '*Start Date' (Mar 22, 2025) and 'End Date' (Mar 24, 2025). Below these are dropdown menus for '*Waitlist Prioritization Level for' (set to 'Home Care') and 'Waitlist Status' (set to 'Closed'). At the bottom right, there are 'Cancel' and 'Save' buttons.

VIVÉ Knowledge Base – Case Management Programs

You return to the **Waitlist** List View where the status column denotes the closure.



Sr. No.	Waitlist Prioritization Leve...	Waitlist Status	Total Weight	Created Date	
1	WL-00081	Home Care	Closed	6	03/22/2025

NOTE: To change the **Total Weight** for a client on the Wait List, data must be updated in various sections of the **COMPASS** and the **Emergency Preparedness** form.

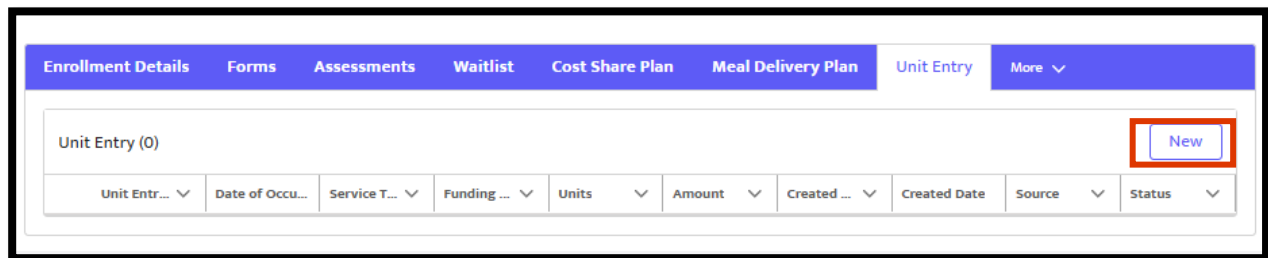
Unit Entry

The **Unit Entry** tab provides access to enter a client specific unit of service on VIVÉ. This tab is located on both the “**Client Profile**” and **Enrollment** levels.

NOTE: For Case Management programs, **Case Notes** can **only** be linked to specific units via the **Unit Entry** tab on the **Enrollment** level.

Linking a Unit Entry and Case Note

Step 1: From the **Enrollment Details Menu**, click the **Unit Entry** tab. A List View displays. Select **New**.



Unit Entr...	Date of Occu...	Service T...	Funding ...	Units	Amount	Created ...	Created Date	Source	Status
--------------	-----------------	--------------	-------------	-------	--------	-------------	--------------	--------	--------

Step 2: The **Unit Entry** form appears. On the top portion of the form, complete all required fields.

NOTE: *The **Date of Occurrence** can be backdated but cannot be set in the future.*

At the bottom portion of the form, is a list of all **Case Notes** associated with the client’s file.

Select the checkbox for the note that pertains to this unit and select **Save**.

You return to the **Unit Entry** tab where the status of the unit is **Draft**. This status remains until the **Monthly Unit Summary** is finalized for the designated month the unit was entered.

Editing a Unit in Draft Status

Step 1: From the **Enrollment Details Menu**, click on the **Unit Entry** tab. Click the desired **Unit Entry Number** link.

Step 2: On the **Unit Entry** details page, make any necessary edits and select **Save**.

You return to the **Unit Entry** list view.

If the unit needs to be deleted, return to the **Unit Entry** details page, select the **Void Unit** button. The unit is voided, and you return to the List View where the voided status is noted.

The screenshot displays the 'Unit Entry' details page. It features several input fields and dropdown menus for editing a unit entry. The fields include: Date of Occurrence (Mar 22, 2025), Enrollment (Case Management - NSHOPP - CMA), Service Type (Case Management - DFTA Funded), Funding Source (NYC Aging Funded Service), Time Spent (60 min), Status (Draft), Client (test-cutie client), Host Type (--None--), Unit Type (Hour), and Total Units (1.00). There is also a 'Service Comments' text area. Below the form is a 'Case Notes' section with a table listing notes. The table has columns for Subject, Note Type, Contact Name, Service Date, Status, Created Date, and Created Name. A single note is visible: 'Assessment Summary' for 'test-cutie client' on '03/21/2025' with a 'Final' status, created by 'Karyn Velez'. At the bottom of the page, there are navigation buttons: 'Cancel', 'Void Unit' (highlighted with a red box), and 'Save'. A 'Showing 1 of 1 Page(s)' indicator and a 'Total Records: 1' label are also present.

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

- [VIVÉ Knowledge Base](#) contains reference guides, short videos, and recorded trainings.
- If you have any questions, please contact the [VIVÉ Application Support Center](#) by submitting a ticket through the [Ticketing Module](#) under **Program Tools**.

[Return to VIVÉ Knowledge Base](#)