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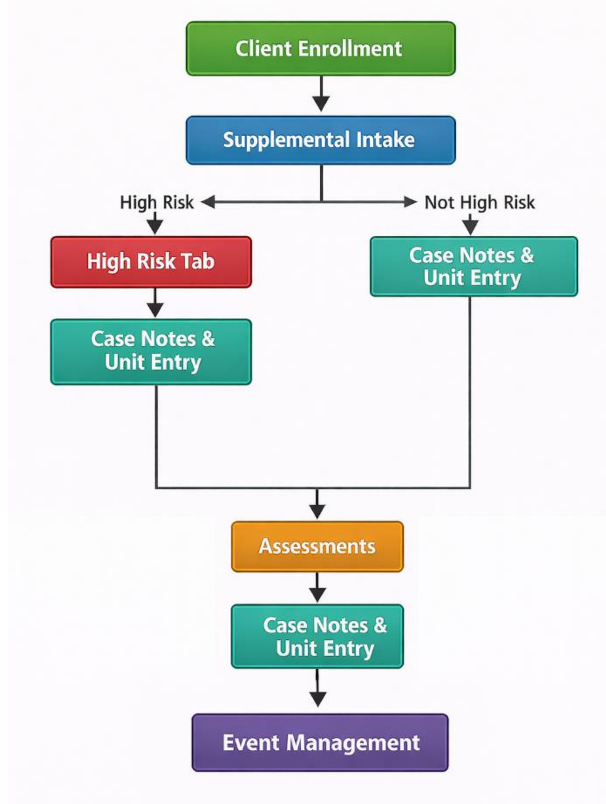
# VIVÉ Elder Justice Supplemental Intake Update

NYC Aging has updated the Supplement Intake, created specialized case monitoring actions and follow-up logic, and streamlined the case note process. These improvements are designed to make your experience with VIVÉ more efficient and systematize your client management. Follow the links below to access sections of this document or external references.

You may access this guide from the VIVÉ Knowledge Base. At the beginning and end of this document is a link to return to the VIVÉ Knowledge Base. For assistance with program operations or policy, please contact to your program officer or view NYC Aging's Program's Standards.

In this guide you will learn about:

## New High Risk Client Flow Diagram




Based upon required entries to the Supplemental Intake, VIVÉ will automatically calculate if the client is high risk at time of referral. The following flow illustrates this new process.

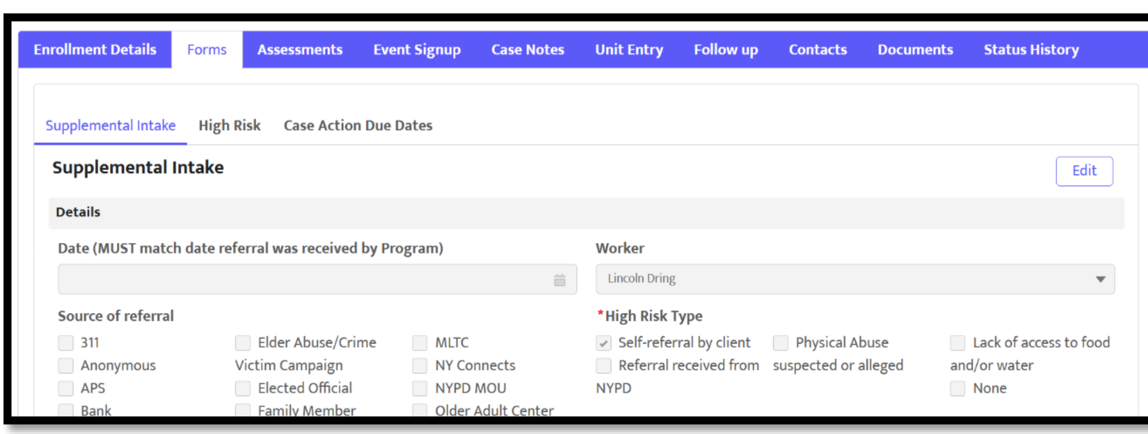
## Client Enrollment

When creating the enrollment, enter the date when you received the client referral. This date will be the same as the date used for the Supplemental Intake.

## Updated Supplemental Intake

After you have enrolled the client into your program, complete the updated Supplemental Intake form. Logic is built into this form to calculate whether the client is high risk. There are three critical improvements:

- The date field is now required as it triggers automatic case monitoring actions. This date <u>**must**</u> match the date your program first received the client referral.
- There is a new High Risk Type section which is also required as it is also part of the case monitoring logic.
- The Type of Victimization is required.



## Supplemental Intake Date

It is critical that this date be the exact date that you received the client referral.  It is possible to back-date this date to the date of referral receipt. If the supplemental intake is not properly backdated, subsequent case monitoring due dates will be incorrectly generated by VIVÉ.

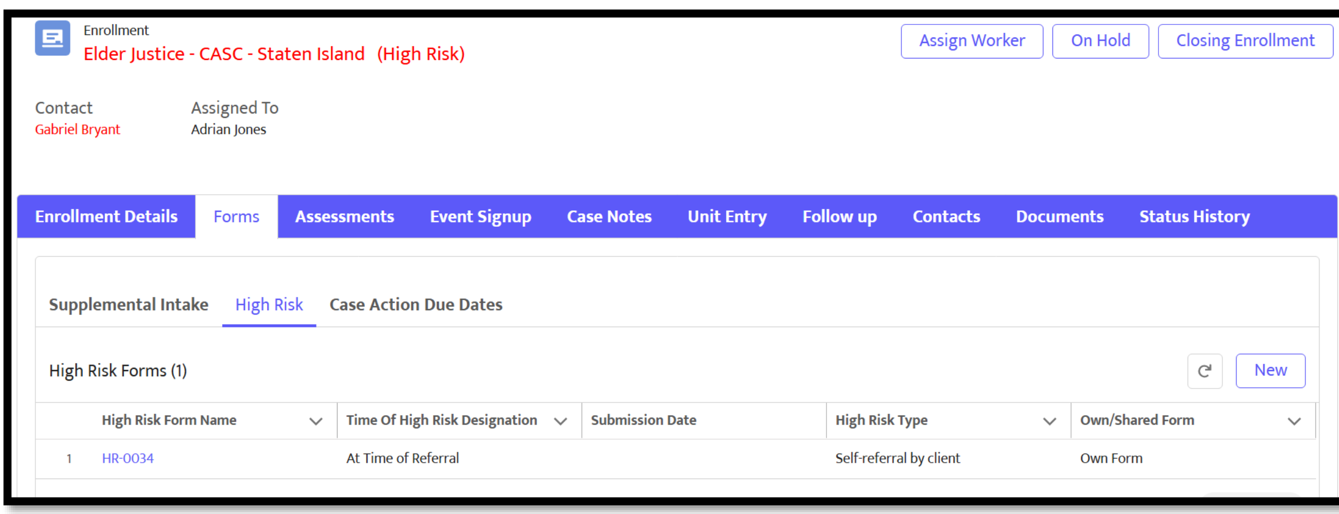
If the Supplemental Intake is entered and the date is subsequently changed, VIVÉ will NOT amend the auto-generated due dates for case monitoring actions.

***NOTE:*** If your program receives a referral outside of business hours (e.g. on a weekend or after your office has closed for the day), you may consider the next business day as the date of referral receipt.

## New High-Risk Tab

The High-Risk tab captures risk information entered by the user. When the High-Risk section of the Supplemental intake form is completed, VIVÉ will automatically populate a new form in the High-Risk tab to indicate if the case meets any of the high-risk criteria outlined in the EJ Program Standards ***at time of referral***. These criteria are:

- Referral received from NYPD
- Allegations of physical abuse
- Lack of access to food and/or water
- Self-referral by client
- None- select if the referral does not meet any of the high-risk criteria above




If any of the high-risk criteria in the supplemental intake form (except “None”) were selected, VIVÉ will recognize the case as a high-risk referral, and the system will:

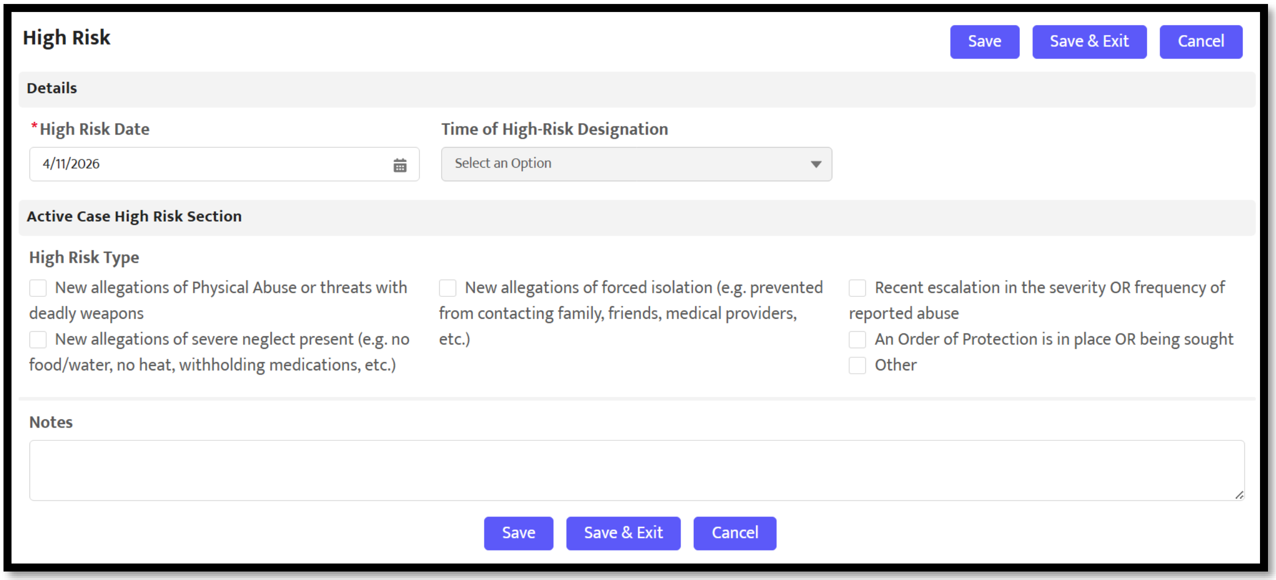
1) Automatically generate a due date for initial client contact 1 workday after the supplemental intake date, as required in the Program Standards, and

2) The client’s name at the top banner will turn **red** indicating the case is high-risk.

***NOTE:*** selecting high-risk criteria in the supplemental intake is the **ONLY** acceptable way to document high-risk status at time of referral.

At any time after intake, staff can also “upgrade” a case to high-risk status, if the client’s risk level increases while the case is active. To document a change in risk-status after time of intake, create a new form in the High-Risk tab.

Select the date that you are upgrading the case, the reason for upgrading the client’s risk status, and note any additional information in the Notes area.




Once you are done, you will see a new form generated in the High-Risk tab list view, and the client’s name in the top banner will turn **red**, signifying that the case is now high-risk.

***NOTE:*** if a case is upgraded to high-risk after time of intake, it will not change any of the case monitoring action due dates. However, the upgraded risk-status will appear in any future generated reports.

***NOTE:*** you cannot “downgrade” a case’s risk status. Once it is designated high-risk, it will remain high-risk until the intake is closed.

## New Case Note Types and Uses

The Case Note Types were updated. These note types are critical elements of the tracking system. You **MUST** use the appropriate case note type to document actions taken, because specific note types trigger and/or resolve specific case monitoring actions and due dates in VIVÉ. If you document a case action using the wrong note type, VIVÉ will NOT amend or resolve the corresponding case monitoring action or due date.

Below is list of each Case Note Type and its use.

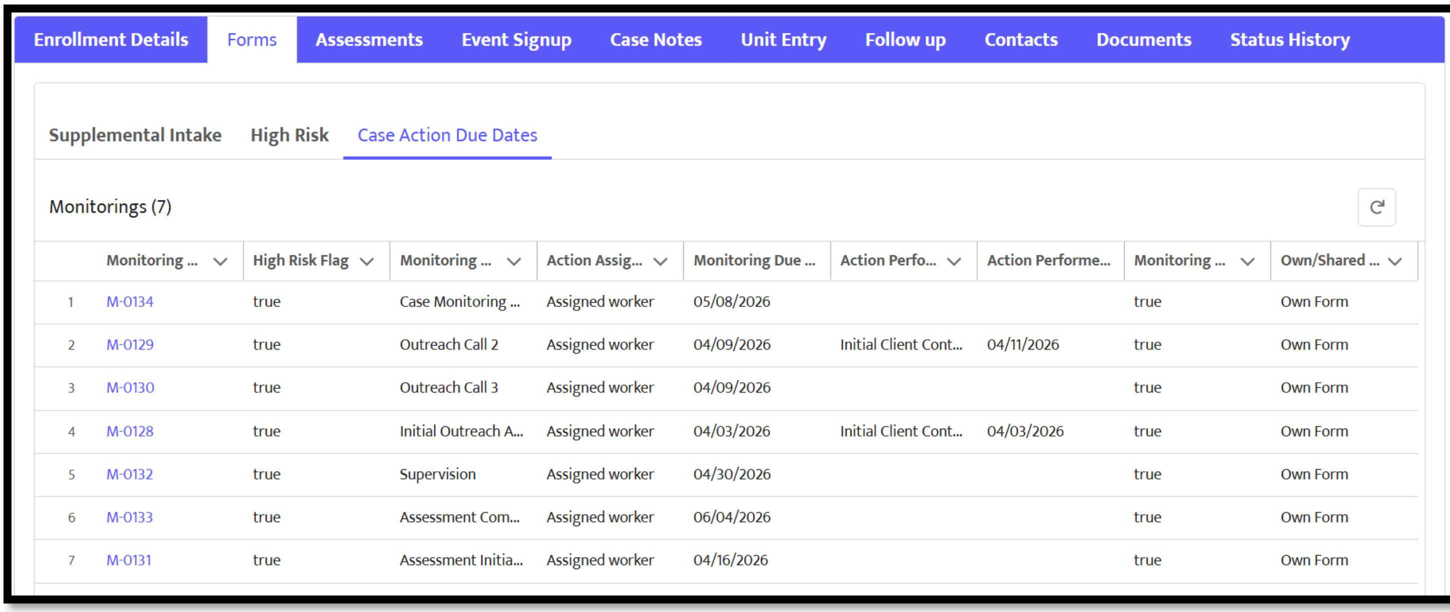
| Case Note Type | When to Use | Scenario |
|---|---|---|
| Initial Client Contact-Attempted | To document an unsuccessful attempt to contact a client ***you've never spoken to before***. | You receive a referral and try calling the client for the first time but they do not answer and you leave a VM. |
| Initial Client Contact-Successful | To document a successful attempt to contact a client ***you've never spoken to before.*** | You receive a referral and try calling the client for the first time. They pick up and you speak briefly. |
| Case Monitoring- Client Contact Made or Attempted | After your first (initial) successful client contact, use this note type to document ***all other client contacts***, whether attempted or successful. | You spoke to a new client for the first time last week. You did a Home Visit today. Use this note type and indicate "Home Visit" in subject line. |
| Supervision | To document supervision conducted for the case. | Assigned Worker and Supervisor discussed this case today; the Supervisor uses this Note Type to document it in the client record. |
| Assessment Initiated by Worker | To document that you initiated (started) the client assessment. | You spoke with the client today and completed PHQ9 and GAD7. Use this note to document that the assessment has been initiated. |
| Assessment Sent to Supervisor for Approval | To document that you completed the client assessment and submitted it to your supervisor for review. | You met with the client today and finished asking all the assessment questions, entered your notes and sent the completed assessment to your supervisor to review. |
| Assessment Approved by Supervisor | To document that the supervisor has approved the client assessment. | Your supervisor reviewed the assessment you submitted; all looks good and your supervisor has approved the assessment. |
| Assessment Returned to Worker | To document that the supervisor has returned the client assessment to the assigned worker for edits. | Your supervisor reviewed the assessment you submitted; some information was not included and your supervisor returned it to you to complete the missing information. |
| Other | To document anything else that does not fall into one of the categories listed above. | You call an ADA on behalf of your client to request a copy of an Order of Protection. |

## Case Action Due Dates Tab (within "Forms" section)

Effective 4/13/26, VIVÉ will automatically generate due dates for various case monitoring actions required in the Elder Justice Program Standards. These due dates are designed to align with the updated Program Standards, which will be released by 5/1/26.

All case monitoring actions and associated due dates will be captured in the Case Action Due Dates tab. When you enter case notes documenting actions taken, VIVÉ will automatically update the Case Action Due Dates tab to reflect the action performed and action date and will generate a new due date for the subsequent action required by Program Standards.

Case Action Due Dates will automatically generate based upon entering the supplemental intake and case notes with appropriate case note types.  As client monitoring continues, new actions will be added with dates prescribed by the standards.




| | Monitoring ... | High Risk Flag | Monitoring ... | Action Assig... | Monitoring Due ... | Action Perfo... | Action Performe... | Monitoring ... | Own/Shared ... |
|---|---|---|---|---|---|---|---|---|---|
| 1 | M-0134 | true | Case Monitoring ... | Assigned worker | 05/08/2026 | | | true | Own Form |
| 2 | M-0129 | true | Outreach Call 2 | Assigned worker | 04/09/2026 | Initial Client Cont... | 04/11/2026 | true | Own Form |
| 3 | M-0130 | true | Outreach Call 3 | Assigned worker | 04/09/2026 | | | true | Own Form |
| 4 | M-0128 | true | Initial Outreach A... | Assigned worker | 04/03/2026 | Initial Client Cont... | 04/03/2026 | true | Own Form |
| 5 | M-0132 | true | Supervision | Assigned worker | 04/30/2026 | | | true | Own Form |
| 6 | M-0133 | true | Assessment Com... | Assigned worker | 06/04/2026 | | | true | Own Form |
| 7 | M-0131 | true | Assessment Initia... | Assigned worker | 04/16/2026 | | | true | Own Form |

These due dates, and the logic used to generate them, are outlined below:

### Initial Outreach Attempt

Definition: the date by which the first client contact attempt must be completed.

Due date if HIGH-RISK referral (based on supplemental intake): one (1) workday after the supplemental intake date.

Due date if NOT high-risk referral (based on supplemental intake): five (5) workdays after the supplemental intake date.

Note Type(s) to Perform this Action: Initial Client Contact- Attempted or Initial Client Contact- Successful

### Outreach Call 2 and Outreach Call 3

Definition: the date by which up to 3 client contact attempts (client outreach attempts) must be documented, unless client is successfully contacted in less than 3 attempts.

Due Date: five (5) workdays after the supplemental intake date.

Note Type(s) to Perform this Action: Initial Client Contact- Attempted or Initial Client Contact- Successful.

Note for Initial Client Contact and Outreach: If a client is successfully contacted in less than 3 attempts, outreach is satisfied and the assigned worker will not be reminded of future outreach due dates; VIVÉ will automatically generate a due date for next client contact based on the date of first successful contact (see below).

**Case Monitoring Contact**

Definition: after the first successful client contact, the next date by which the client must be contacted (either attempted or successful).

Due Date: every 20 workdays, beginning from the date of initial client contact- successful.

Note Type to Perform this Action: Case Monitoring- Client Contact Made or Attempted

**Assessment Initiation**

Definition: the date by which the client assessment must be started by the assigned worker.

Due Date: ten (10) workdays after the supplemental intake date.

Note Type to Perform this Action: Assessment Initiated by Worker

**Assessment Completion**

Definition: the date by which the client assessment must be completed by assigned worker and submitted to supervisor for review and approval.

Due Date: forty-five (45) workdays after the supplemental intake date.

Note Type to Perform this Action: Assessment Sent to Supervisor for Approval

**Assessment Approval**

Definition: the date by which the supervisor must review the client assessment and either approve or return to worker.

Due Date: ten (10) workdays after the assessment was submitted to supervisor for approval.

Note Type(s) to Perform this Action: Assessment Approved by Supervisor or Assessment Returned to Worker

**Supervision**

Definition: the date by which supervision must be completed.

Due Date: every 20 workdays, beginning from the date of initial client contact- successful.

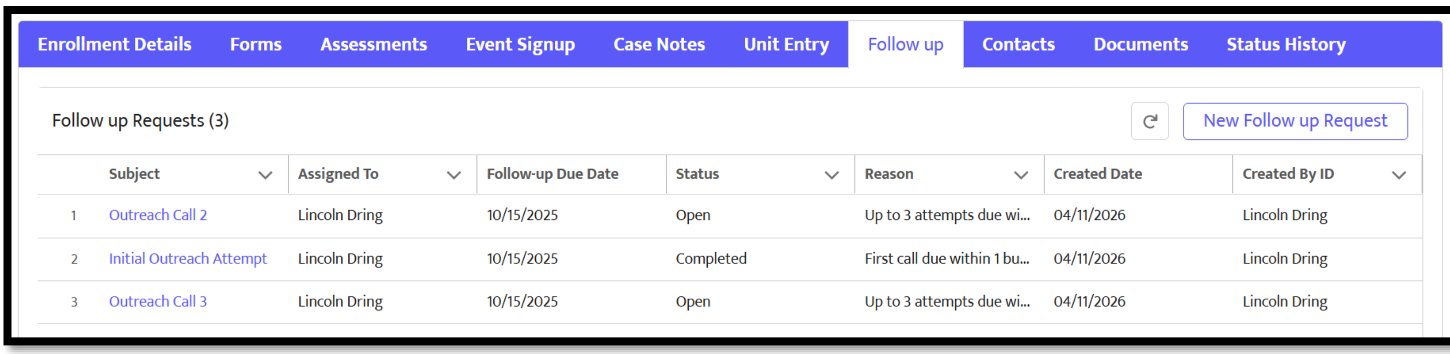
Note Type to Perform this Action: Supervision

## Follow Up Section

Beginning 4/13/26, all case monitoring actions due within the next 5 weekdays will automatically appear in the Follow up tab within each Elder Justice client profile. This is a tool to help you quickly identify which due dates are approaching and require action for any given client.

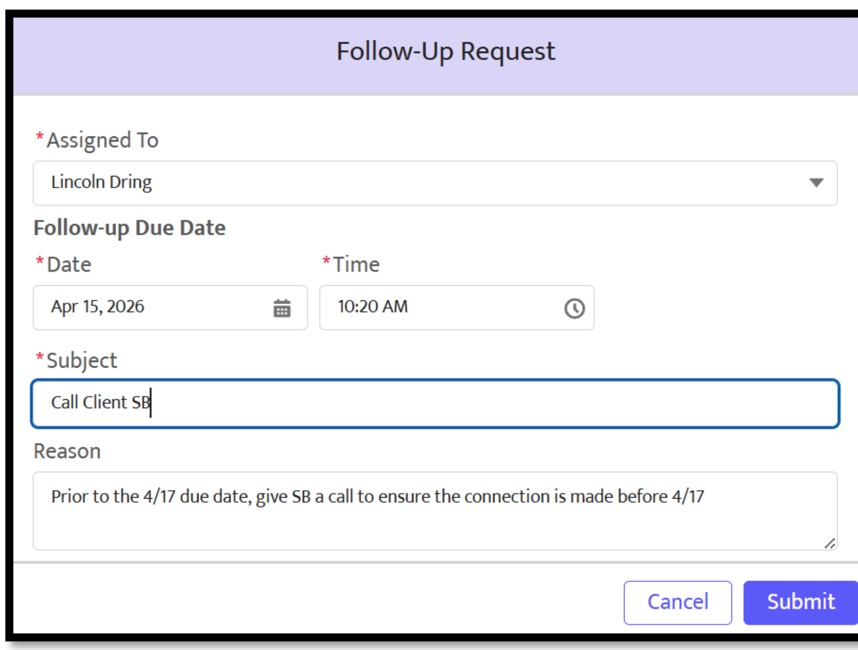
Once a specific action is performed and documented in case notes, the associated follow up item will be automatically marked complete in your Follow Up section.

***NOTE:*** The date in the Follow Up tab (the "Follow-up Due Date") is not the date the case monitoring action is due. Rather, you can think of the Follow-up Due Date as the date that VIVÉ reminded you that an action will be due in the coming days. To avoid confusion, we recommend you primarily reference the Case Action Due Dates tab or the My Follow-Ups Dashboard Report (see below) both of which include accurate case monitoring action due dates.



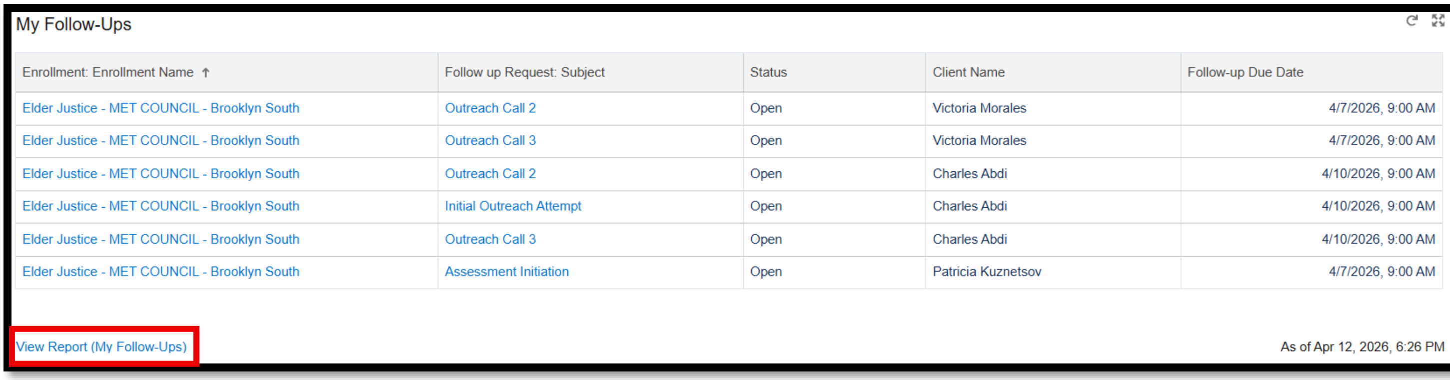

| | Subject | Assigned To | Follow-up Due Date | Status | Reason | Created Date | Created By ID |
|---|---|---|---|---|---|---|---|
| 1 | Outreach Call 2 | Lincoln Dring | 10/15/2025 | Open | Up to 3 attempts due wi... | 04/11/2026 | Lincoln Dring |
| 2 | Initial Outreach Attempt | Lincoln Dring | 10/15/2025 | Completed | First call due within 1 bu... | 04/11/2026 | Lincoln Dring |
| 3 | Outreach Call 3 | Lincoln Dring | 10/15/2025 | Open | Up to 3 attempts due wi... | 04/11/2026 | Lincoln Dring |

You may also add additional Follow Up items in this section manually. For example, if an initial outreach call is not due until 4/17/26, but you want to call the client on 4/15/26, you may manually add a follow up item to remind yourself to call the client on 4/15/26. Manually added Follow Up items will appear in the Follow Up tab and in the My Follow-Ups dashboard and report (see below), but these items will not have a case monitoring action due date.



## My Follow-Ups Dashboard and Report: Upcoming Due Date Reminders

Beginning 4/13/26, all case monitoring actions that are due within the next 5 weekdays for all cases assigned to you will automatically appear in your “My Follow-Ups” Dashboard on the VIVÉ home page.


My Follow-Ups

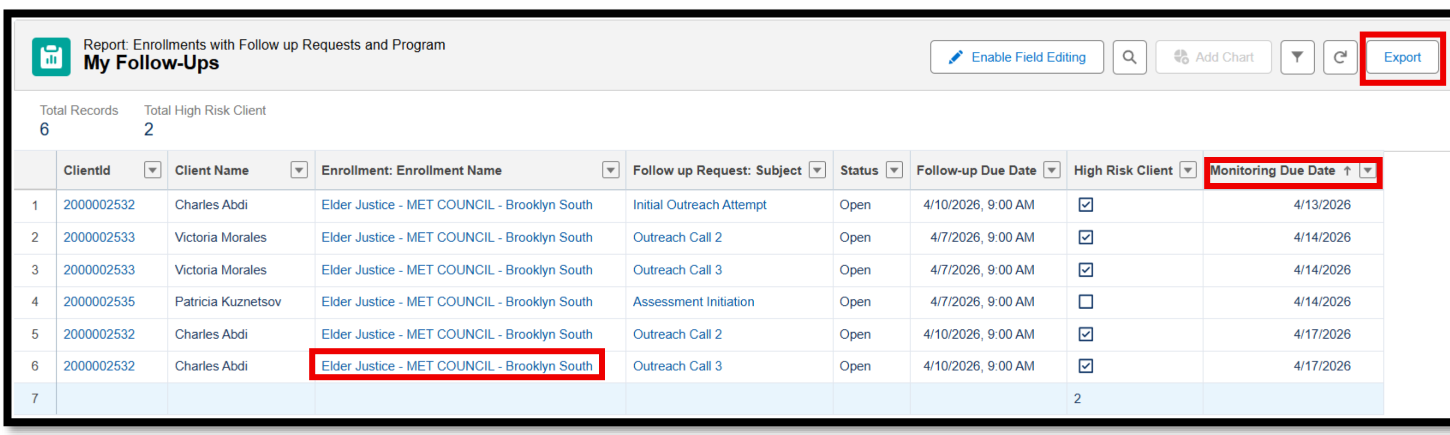
| Enrollment: Enrollment Name ↑ | Follow up Request: Subject | Status | Client Name | Follow-up Due Date |
|---|---|---|---|---|
| Elder Justice - MET COUNCIL - Brooklyn South | Outreach Call 2 | Open | Victoria Morales | 4/7/2026, 9:00 AM |
| Elder Justice - MET COUNCIL - Brooklyn South | Outreach Call 3 | Open | Victoria Morales | 4/7/2026, 9:00 AM |
| Elder Justice - MET COUNCIL - Brooklyn South | Outreach Call 2 | Open | Charles Abdi | 4/10/2026, 9:00 AM |
| Elder Justice - MET COUNCIL - Brooklyn South | Initial Outreach Attempt | Open | Charles Abdi | 4/10/2026, 9:00 AM |
| Elder Justice - MET COUNCIL - Brooklyn South | Outreach Call 3 | Open | Charles Abdi | 4/10/2026, 9:00 AM |
| Elder Justice - MET COUNCIL - Brooklyn South | Assessment Initiation | Open | Patricia Kuznetsov | 4/7/2026, 9:00 AM |

View Report (My Follow-Ups)

As of Apr 12, 2026, 6:26 PM

At the bottom of this Dashboard, click on “View Report (My Follow-Ups)” to view a full report of all actions, **including accurate case monitoring action due dates**.

The Report will show a list of all case monitoring actions due within the next 5 weekdays, including a flag for cases that are high-risk and a column to show the monitoring action due date. This report can be sorted within VIVÉ, by clicking on the column heading, or exported.


Report: Enrollments with Follow up Requests and Program

**My Follow-Ups**

Enable Field Editing · Add Chart · Export

Total Records 6 · Total High Risk Client 2

| | ClientId | Client Name | Enrollment: Enrollment Name | Follow up Request: Subject | Status | Follow-up Due Date | High Risk Client | Monitoring Due Date ↑ |
|---|---|---|---|---|---|---|---|---|
| 1 | 2000002532 | Charles Abdi | Elder Justice - MET COUNCIL - Brooklyn South | Initial Outreach Attempt | Open | 4/10/2026, 9:00 AM | ☑ | 4/13/2026 |
| 2 | 2000002533 | Victoria Morales | Elder Justice - MET COUNCIL - Brooklyn South | Outreach Call 2 | Open | 4/7/2026, 9:00 AM | ☑ | 4/14/2026 |
| 3 | 2000002533 | Victoria Morales | Elder Justice - MET COUNCIL - Brooklyn South | Outreach Call 3 | Open | 4/7/2026, 9:00 AM | ☑ | 4/14/2026 |
| 4 | 2000002535 | Patricia Kuznetsov | Elder Justice - MET COUNCIL - Brooklyn South | Assessment Initiation | Open | 4/7/2026, 9:00 AM | ☐ | 4/14/2026 |
| 5 | 2000002532 | Charles Abdi | Elder Justice - MET COUNCIL - Brooklyn South | Outreach Call 2 | Open | 4/10/2026, 9:00 AM | ☑ | 4/17/2026 |
| 6 | 2000002532 | Charles Abdi | Elder Justice - MET COUNCIL - Brooklyn South | Outreach Call 3 | Open | 4/10/2026, 9:00 AM | ☑ | 4/17/2026 |
| 7 | | | | | | | 2 | |

***NOTE:*** within the report, click on the “enrollment name” associated with each task to go straight to the client’s Elder Justice enrollment page.

## Supervisor Report: Upcoming Due Date Alerts

Beginning 4/13/26, all Elder Justice program directors and supervisors will begin to receive an auto-generated daily email with an attached report showing all upcoming case monitoring actions for all clients enrolled in your program that are due within the next 5 weekdays.

The daily supervisor's report, which can be filtered by assigned worker, case monitoring action due date and high-risk case status, is a tool to help program supervisors manage their staff and ensure that critical timeliness requirements and case actions are completed and documented in accordance with the Program Standards.

| Program Name | Assigned To | Client_ID | Monitoring_Type | followup date | monitoring date | HighRisk |
| --- | --- | --- | --- | --- | --- | --- |
| ----------- | ----------------- | ---------- | --------- | ------------- | ------------------- | ------------- |
| Elder Justice - JASA - Brooklyn North | Worker 1 | 2000011413 | Initial Outreach Attempt | 4/1/2026 | 4/8/2026 | N |
| Elder Justice - JASA - Brooklyn North | Worker 1 | 2000011413 | Outreach Call 2 | 4/1/2026 | 4/8/2026 | N |
| Elder Justice - JASA - Brooklyn North | Worker 1 | 2000011413 | Outreach Call 3 | 4/1/2026 | 4/8/2026 | N |
| Elder Justice - JASA - Brooklyn North | Worker 2 | 2000011414 | Initial Outreach Attempt | 4/10/2026 | 4/13/2026 | Y |
| Elder Justice - JASA - Brooklyn North | Worker 2 | 2000011414 | Outreach Call 2 | 4/10/2026 | 4/13/2026 | Y |
| Elder Justice - JASA - Brooklyn North | Worker 2 | 2000011414 | Outreach Call 3 | 4/10/2026 | 4/13/2026 | Y |
| Elder Justice - JASA - Brooklyn North | Worker 1 | 2000011474 | Outreach Call 2 | 4/6/2026 | 4/13/2026 | Y |
| Elder Justice - JASA - Brooklyn North | Worker 1 | 2000011474 | Outreach Call 3 | 4/6/2026 | 4/13/2026 | Y |

### 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