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The VIVÉ Legal Assistance for Older New Yorkers Reference Guide

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

You may have accessed 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 contact to your program officer or view [NYC Aging's Program's Standards](#).

In this guide you will learn about:

- Legal Assistance Flow
- Consent
- Client Profile
- Details Tab
 - Sub-Details: Basic Demographics
 - Sub-Details: Social Demographics
 - Sub-Details: Financials
- Client Enrollment
 - Entering Client Units
 - Editing Client Units
 - Voiding Client Units
 - Entering Case Type and Service Levels (Legal Assistance Form)
- Closing Enrollment
- Event Unit Entry
 - Entering Anonymous Units
- Monthly Unit Summary
 - Reports
- Access Assistance with VIVÉ and the VIVÉ Knowledge Base

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

- [Basic Navigation](#)
- [Case Notes](#)
- [Client Profile](#)
- [Client Search & Initial Data Entry](#)
- [Contacts](#)
- [Dashboard](#)
- [Enrollments](#)
- [Events](#)
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Legal Assistance Flow

The above flow diagram illustrates the navigation processes for key aspects of your work. This diagram provides a general overview of the steps involved in completing key tasks, while also showcasing the various sections of VIVÉ. Detailed instructions on how to enter information will be provided in each of the sections.

Flow Chart



NOTE: If you have access to multiple programs in VIVÉ, you can switch between them by utilizing the program selection drop down.

NYC Department for the Aging | VIVÉ

Client Search Referral Queue Program Tools Admin Tools Reports More

Logged in user is Ash Abbott and working in Legal Assistance - BLS - BK, MN, & SI program.

Program Selection

Current Program

Legal Assistance - BLS - BK, MN, & SI

Available Programs

Legal Assistance - BLS - BK, MN, & SI

Save

Home

User Profile

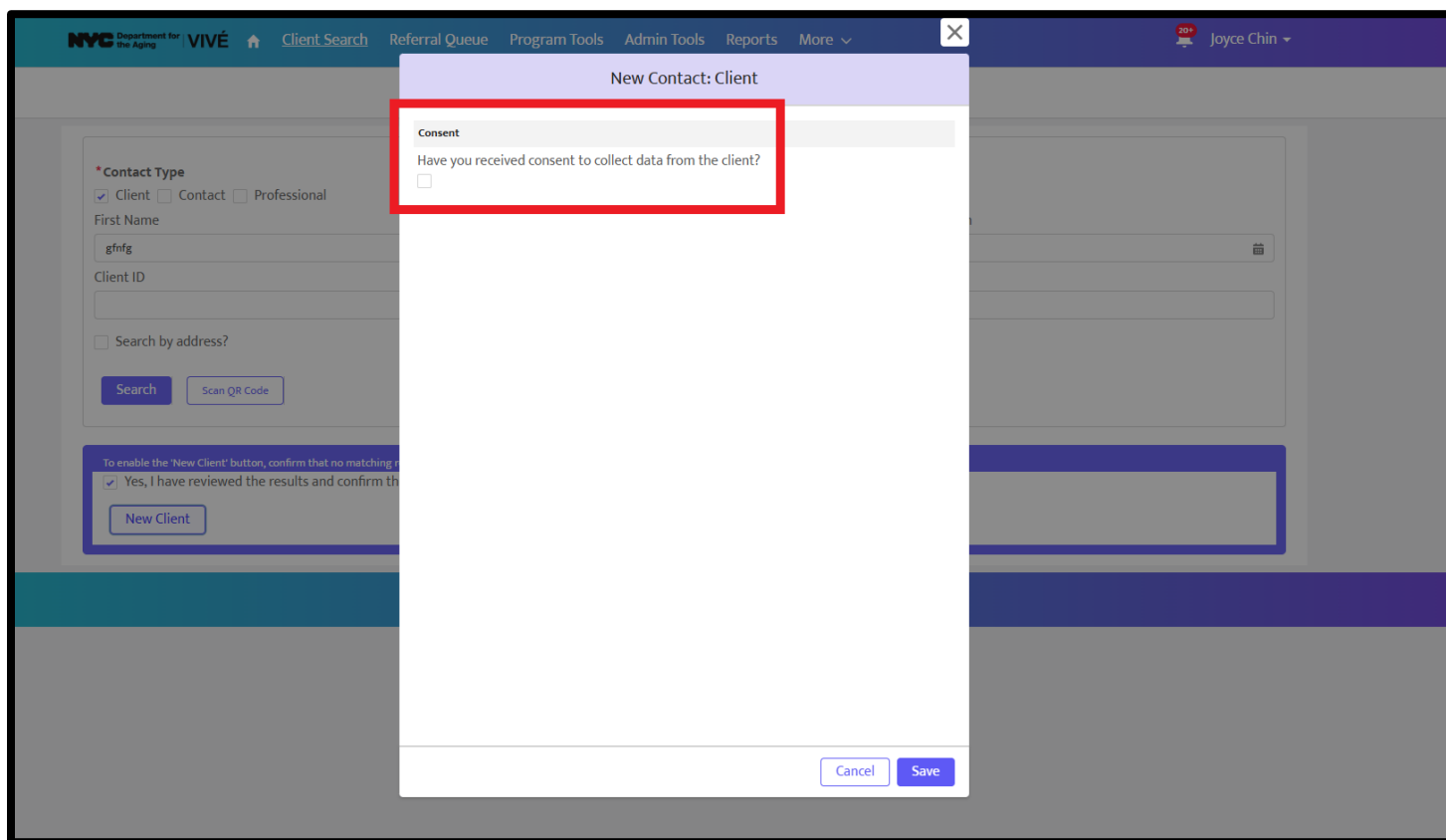
My Account

Program Selection

Logout

Consent

Legal Assistance providers may maintain copies of client consent documents in their own case management systems and are not required to upload these consents into VIVÉ. However, because all client profiles require a record of consent, in order to save or view a client profile, providers will be required to check the box that they have obtained consent to collect data from the client.



Client Profile

The Client Profile is the summation of basic details and demographics for a client. The process of creating a client profile is described within our reference guide on [Client Profile](#).

The screenshot shows a client profile for Tommy Tune. At the top, there is a profile picture placeholder with an 'Upload Picture' link. To the right, the name 'Tommy Tune' is displayed next to a purple ID icon. A button labeled 'Inactivate Client Profile' is in the top right corner. Below the name, client information is listed: Contact Type (Client), Date of Birth (7/7/1955), Phone, and Home Address (50 LEXINGTON AVENUE, MANHATTAN, NY 10010). A horizontal menu bar contains tabs: Details, Consents, Contacts, General Comments, Enrollments, Documents, Program History, and Profile Update History. The 'Details' tab is active, showing a sub-menu with Basic Demographics, Social Demographics, Emergency Preparedness, Financial, and NYSOFA Additional Info. Under 'Basic Demographics', the ID is 2000001789 and the Status is Active.

Legal Assistance providers are not required to complete the entire Client Profile, but must enter the following client characteristics information required by the New York State Office for the Aging (NYSOFA) State Performance Report (SPR):

- Date of birth (will be generated on the SPR as age distribution)
- Gender (will be generated on the SPR as gender distribution)
- Address (will be generated on the SPR as geographic distribution, i.e., rural or non-rural)
- Income (will be generated on the SPR as Poverty status distribution, i.e., at or below poverty or above poverty)
- Lives With (will be generated on the SPR as Household status distribution, i.e., lives alone, with others, or in Long Term Care facility)
- Ethnic heritage and Race (will be generated on the SPR as Ethnicity distribution, Race distribution, and Minority status distribution)

Details Tab

The Details tab includes a sub-details menu of **Basic Demographics, Social Demographics, Emergency Preparedness, Financial and NYSOFA Additional Information**. Only **Basic Demographics, Financial, and Social Demographics** are described below. For additional information on the sub-sections see Details Tab within Client Profile.

Sub-Details: Basic Demographics

Once you have either entered a new client or used the hyperlink to get into the client's profile, the destination is **Basic Demographics**. The client's core information, such as address (required by the SPR), age (required for all clients), and phone number are maintained here. These fields are editable once the user clicks the **Edit** button at the bottom. First and last name, date of birth, and address are required fields (note red asterisk). Once editing, the **Save** button will appear at the bottom of the screen. Also, note that the checkbox next to "rural" will be automatically checked if it applies based on the address entered. Click **Save** before leaving the page.

The screenshot shows a user profile page with a top navigation bar containing tabs: Details, Consents, Contacts, General Comments, Enrollments, Documents, Program History, and Profile Update History. Below this is a sub-navigation bar with tabs: Basic Demographics (highlighted with a red box), Social Demographics, Emergency Preparedness, Financial, and NYSOFA Additional Info. The main content area displays client information in two columns:

ID	Status
2000001789	Active
Last Name	Suffix
Tune	
First Name	Title
Tommy	
Middle Initial/Name	Preferred Name
Date of Birth	Age
7/7/1955	70
Home Address	Is Mailing Address same as Home Address?
50 LEXINGTON AVENUE, MANHATTAN, NY 10010	✓

Sub-Details: Social Demographics

Moving from left to right, the next sub-tab is Social Demographics (the underlined and highlighted word lets you know where you are in the system). The client's information such as who they live with, race, and ethnicity (all required by the SPR) are maintained here. To edit these fields, click Edit at the bottom. Before leaving, click Save at the bottom of the page.

NOTE: Be sure to enter all data required by the state: age, gender, ethnicity, poverty status, household status, geographic distribution, race, and minority status.

The screenshot shows the 'Social Demographics' sub-tab highlighted with a red box. The main content area displays client information in two columns:

Current Marital Status	Frail and/or disabled
Widowed	--None--
Lives With	Number of pets owned by client
Alone	
Type of pets owned by client	
Available	Chosen
Cat	No pets
Dog	
Fish	

Sub-Details: Financials

Moving from left to right, the next sub-tab is Financials (the underlined and highlighted word lets you know where you are in the system). The client's income information (required by the SPR) is maintained here. To edit these fields, click Edit. Next, answer the question of whether the client agrees to provide financial information. Once Yes is selected, the page will open to answer additional questions. Scroll down to the Income, Assets, Expenses section. Select Income and click New. Select Other from the drop-down, enter the full total income and sources of income in the notes section. Before leaving, click Save at the bottom of the page.

Step 1: Click **Edit**.

The screenshot shows the client profile for Ted Danson. The 'Financial' tab is highlighted with a red box. Below the tabs, the 'Edit' button is highlighted with a red box.

Step 2: Scroll down to the **Income, Assets, Expenses** section. Click **New**.

The screenshot shows the Financial section of the client profile. The 'Household Size' dropdown menu is open, showing options from 1 to 7. The 'Total of Household Amount (Yearly)' and 'Total of Expenses (Yearly)' fields are both \$0.00. The 'Poverty Level' is 100% (Last Modified On: 11-26-2025). The 'Save' button is visible at the bottom.

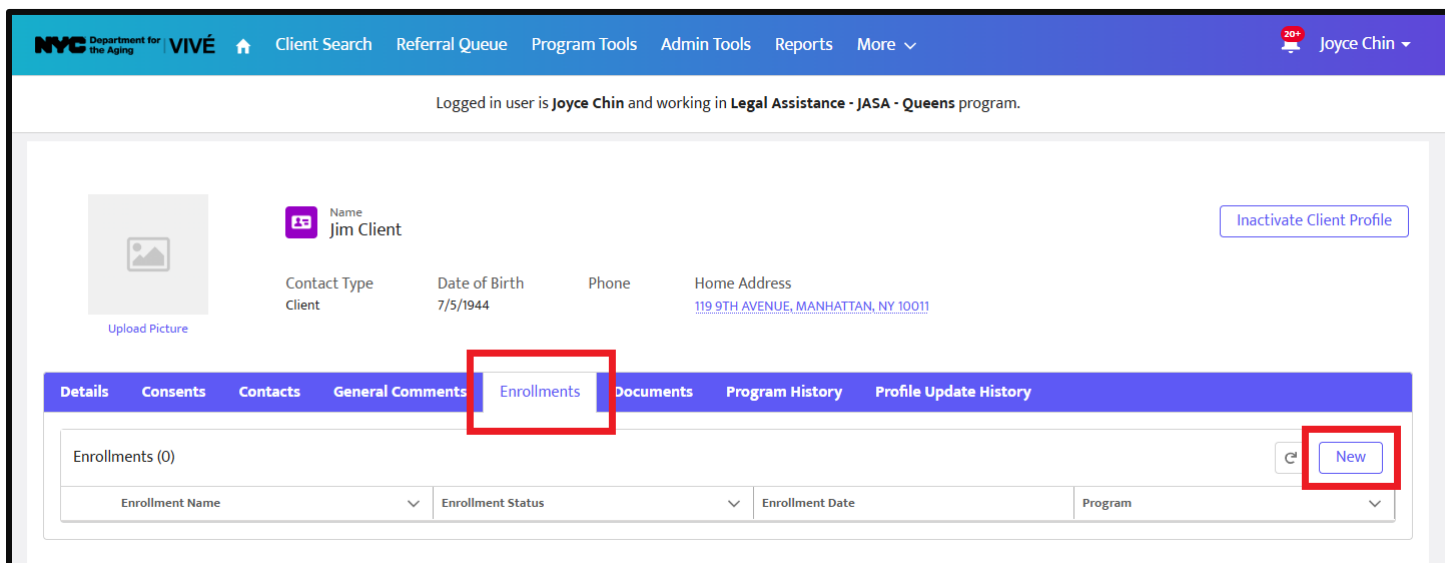
The screenshot shows the 'Incomes' tab selected in a blue header bar. Below the header, there's a section titled 'Incomes (0)' with a 'New' button highlighted by a red box. Below this is a table with columns: 'Income ID', 'Monthly Income Info. complete...', 'Sources of income', 'Other source of income defined', and 'Monthly Amount'. The table currently shows two rows of summary data: 'Total of Household Amount (Monthly)' with a value of '\$0.00' and 'Total of Household Amount (Yearly)' with a value of '\$0.00'.

The screenshot shows the 'New Income' form. On the left, there's a 'Contact' field with 'Vilma NMIC' selected. On the right, there's a list of income sources: 'Temporary Assistance for Needy Families (TANF)', 'Veteran's Benefits', 'Public Assistance', 'Unemployment', 'Food Stamps (SNAP)', and 'Other Income (please specify below)'. The 'Other Income' option is highlighted with a red box. At the bottom, there are 'Cancel' and 'Save' buttons.

The screenshot shows the 'New Income' form with more details. The '* Monthly Income Info. completed for' dropdown is set to 'Client'. The '* Sources of income' dropdown is set to 'Other Income (please specify below)'. The '* Monthly Amount' field is highlighted with a red box. There's also an 'Other source of income defined' field. The '* Contact' field shows 'Tommy Tune'. At the bottom, there are 'Cancel' and 'Save' buttons.

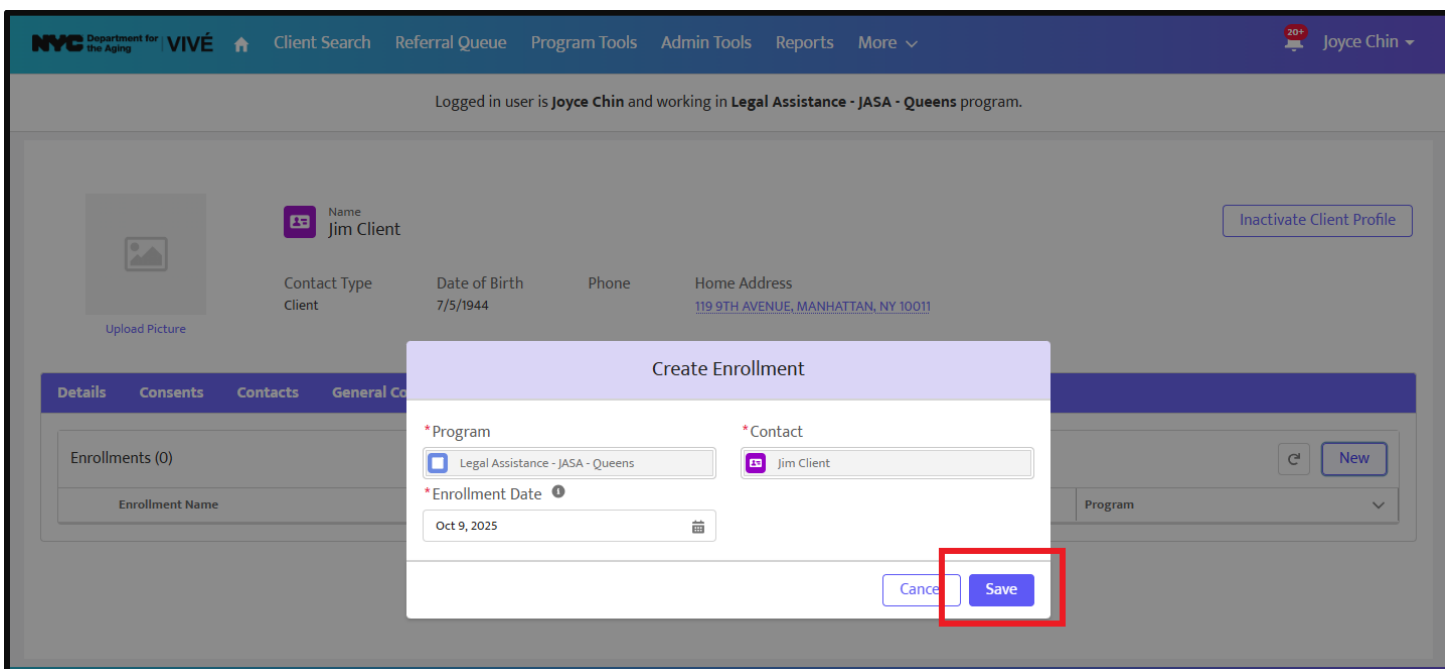
Client Enrollment

A client must be enrolled in a program to enter units of service and complete any forms related to the program. The process of enrolling a client is described within our reference guide on [Enrollments](#).



The screenshot shows the VIVÉ client profile for 'Jim Client'. The 'Enrollments' tab is selected and highlighted with a red box. Below the tab, there is a table for 'Enrollments (0)' with columns for 'Enrollment Name', 'Enrollment Status', 'Enrollment Date', and 'Program'. A 'New' button is located to the right of the table, also highlighted with a red box. The top navigation bar includes links for Client Search, Referral Queue, Program Tools, Admin Tools, Reports, and More. The user is logged in as Joyce Chin, working in the Legal Assistance - JASA - Queens program.

Step 1: After creating a client, you can navigate to the client profile to enroll them in your program. To do this select **Enrollment** on the blue tab and then click “New.”



The screenshot shows the same VIVÉ client profile page, but with the 'Create Enrollment' pop-up form open. The form has fields for 'Program' (set to 'Legal Assistance - JASA - Queens'), 'Contact' (set to 'Jim Client'), and 'Enrollment Date' (set to 'Oct 9, 2025'). The 'Save' button is highlighted with a red box. The background is dimmed, and the 'Enrollments' tab remains selected.

Step 2: After clicking **New**, this pop up will appear. Enter the date the client was enrolled, and then click **Save**.

The enrollment page for the newly enrolled client will now be displayed. An overview of the enrollment will be available in the **Enrollment Details** section when selected.

The screenshot shows the 'Enrollment Details' page for 'Legal Assistance - JASA - Queens'. At the top, it lists 'Contact: Bon Jovi' and 'Assigned To'. Below this is a navigation bar with tabs: 'Enrollment Details' (selected), 'Forms', 'Unit Entry', 'Follow up', 'Contacts', 'Documents', and 'Status History'. The main content area is divided into two sections: 'Enrollment Information' and 'Referral Information'. The 'Enrollment Information' section contains fields for 'Enrollment Name' (Legal Assistance - JASA - Queens), 'Enrollment Status' (Active), 'Enrollment Date' (10/9/2025), and 'Program' (Legal Assistance - JASA - Queens). The 'Referral Information' section contains fields for 'Linked Referral' and 'Referring Agency Name'. Each field has a small edit icon next to it.

Entering Client Units

There are three status types for Client Units:

- **Draft:** A unit in draft status can be edited. NOTE: Any unit in draft status will be automatically finalized when a **Monthly Unit Summary** is generated (see more below).
- **Final:** A unit that has been finalized can no longer be edited and will be captured within the **Monthly Unit Summary** (see more below).
- **Void:** A unit in draft status can be marked as void, and it will not be included in any finalized reports.

For the Legal Assistance Program only, providers will be able to enter in the exact number of minutes spent providing legal assistance. The units will be automatically calculated by the system.

The screenshot shows the 'Unit Entry' form. It contains several fields for entering unit information. The fields are organized into two columns. The left column includes: '*Date of Occurrence' (Jul 15, 2026), 'Enrollment' (Legal Assistance - JASA - Queens), '*Service Type' (Legal Assistance), '*Funding Source' (NYC Aging Funded Service), and '*Total Time Spent in Minutes' (18). The right column includes: '*Status' (Draft), 'Client' (Test Client 01), 'Host Type' (In-Person), 'Unit Type' (Hour), and '*Total Units' (0.30). The bottom row, containing '*Total Time Spent in Minutes' and '*Total Units', is highlighted with a red border.

Use the **Enrollment Details Menu** to enter units specific to a client.

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

Step 2: From the **Details Menu**, click **Enrollments**.

Step 3: From the **Enrollment Details Menu**, click the **Unit Entry** tab. (Depending upon your window's width, you may have to select **More** to access **Unit Entry** from that dropdown menu.)

Step 4: Click **New**.

The screenshot shows the 'Unit Entry' tab selected in the top navigation bar. Below the navigation bar, there is a table titled 'Unit Entry (1)'. The table has columns for Unit Entry #, Date of Occurrence, Service Type, Funding Source, Units, Amount, Created by, Created Date, Source, and Status. A single row is visible with the following data: 1, UE-23167799, 09/29/2025, Legal Assistance, NYC Aging Funded ..., 0.75, Patria Alguila, 09/29/2025, Enrollment, Draft. To the right of the table, there is a 'New' button highlighted with a red box. Below the table, there are pagination controls showing 'Showing 1 of 1 Page(s)' and 'Total Records: 1'.

Step 5: Enter the details, which must include the required fields marked by an asterisk.

Step 6: Click **Save**.

The screenshot shows the 'Unit Entry' form. It contains several fields for data entry, some of which are marked with an asterisk to indicate they are required. The fields include: Date of Occurrence (Oct 17, 2025), Status (Draft), Enrollment (Legal Assistance - JASA - Queens), Client (Tommy Tune), Service Type (Legal Assistance), Host Type (In-Person), Funding Source (NYC Aging Funded Service), Unit Type (Hour), Time Spent (90 min), Total Units (1.50), and Service Comments. At the bottom of the form, there is a 'Case Notes' section with a table for notes. The table has columns for Subject, Note Type, Contact Name, Service Date, Status, Created Date, and Created Name. Below the table are three buttons: 'Cancel', 'Void Unit', and 'Save'.

TIP: Service comments are optional; however, they can provide helpful details when reconciling units.

Editing Client Units

Use the **Enrollment Details Menu** to edit units for a client. You can only edit units that are in **Draft** status. When units are finalized on the **Monthly Unit Summary**, all unit entry fields will be locked and can no longer be edited. To unlock a unit or the **Monthly Unit Summary** after it has been finalized, please contact your Program Officer.

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

Step 2: From the **Details Menu**, click **Enrollments**.

Step 3: From the **Enrollment Details Menu**, click the **Unit Entry** tab. (Depending upon your window's width, you may have to select **More** to access **Unit Entry** from that dropdown menu.)

Step 4: Click the link under the heading **Unit Entry** to view the details.

Enrollment Details Forms Unit Entry Follow up Contacts Documents Status History										
Unit Entry (2)										New
Unit Entry #	Date of Occurrence	Service Type	Funding Source	Units	Amount	Created by	Created Date	Source	Status	
1	UE-23168415	10/17/2025	Legal Assistance	NYC Aging Funded ...	1.5	Patria Alguila	10/17/2025	Enrollment	Draft	
2	UE-23167799	09/29/2025	Legal Assistance	NYC Aging Funded ...	0.75	Patria Alguila	09/29/2025	Enrollment	Draft	
Showing 1 of 1 Page(s) << First < Previous Next > Last >> Total Records: 2										

Voiding Client Units

Providers may wish to void a unit that was entered incorrectly or inaccurately. Only units that are in draft status can be voided; providers cannot void finalized units (units are finalized by either marking the unit as finalized, or by running the Monthly Unit Summary). For assistance with voiding units after finalization, please contact your Program Officer.

Step 1: Go to the **Unit Entry** details page.

Step 2: Click **Void Unit** at the bottom of the page.

NOTE: Once a unit has been voided, it cannot be edited. A void cannot be undone, and a new unit must be created instead.

Adding Units to a Client Profile

All service units should be added to the Legal Assistance enrollment on the client profile as described above. For the occasional instance where a client reaches out after an enrollment has already been closed, Provider may add (limited) service units directly to the client profile without having to open a new enrollment. Any Legal Assistance unit added to a client profile will be confidential and will not appear for any other programs who may view the client's profile. Units entered onto a client profile will be captured by the Monthly Unit Summary as well as the Client Unit report.

Entering Case Type and Service Levels (Legal Assistance Form)

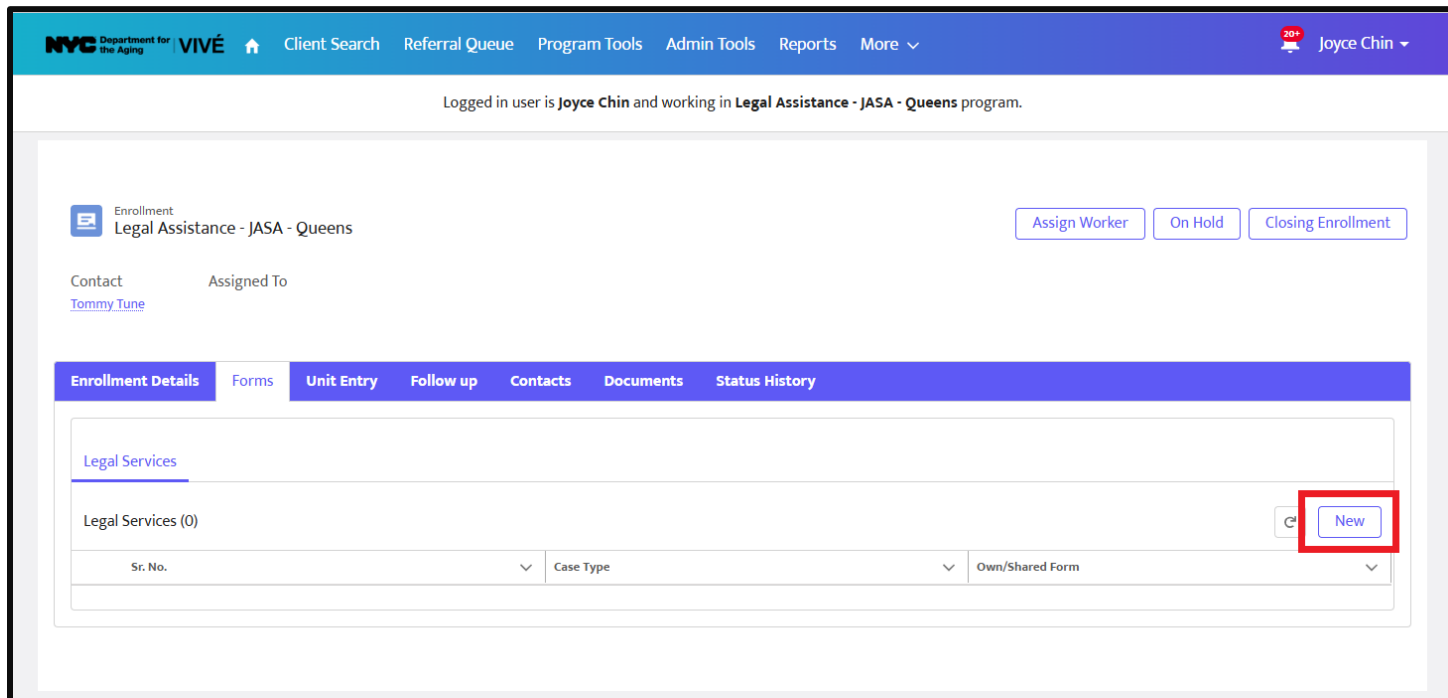
Legal Assistance providers are required to report the levels of service provided to each client, which will be aggregated and reported to NYSOFA as part of the State Performance Report (SPR). This data will be entered under the **Form** sub-category under **Enrollments** ("Legal Assistance Form"). An additional form should be created for each **Case Type** in order to capture information about each of the case matters the program completed. For clients with more than one pending case type, the form can be created when each case matter is closed. Only when all case matters are closed should the client's **Program Enrollment** be closed (see instructions for closing a program enrollment below).

The screenshot shows the VIVÉ client profile for Tommy Tune. The user is logged in as Joyce Chin. The profile includes fields for Name, Contact Type (Client), Date of Birth (7/7/1955), Phone, and Home Address (50 LEXINGTON AVENUE, MANHATTAN, NY 10010). The Enrollments tab is selected, showing a table with one enrollment record. The enrollment name "Legal Assistance - JASA - Queens" is highlighted with a red box. The enrollment status is "Active", the enrollment date is "09/27/2025", and the program is "Legal Assistance - JASA - Queens".

Enrollment Name	Enrollment Status	Enrollment Date	Program
Legal Assistance - JASA - Queens	Active	09/27/2025	Legal Assistance - JASA - Queens

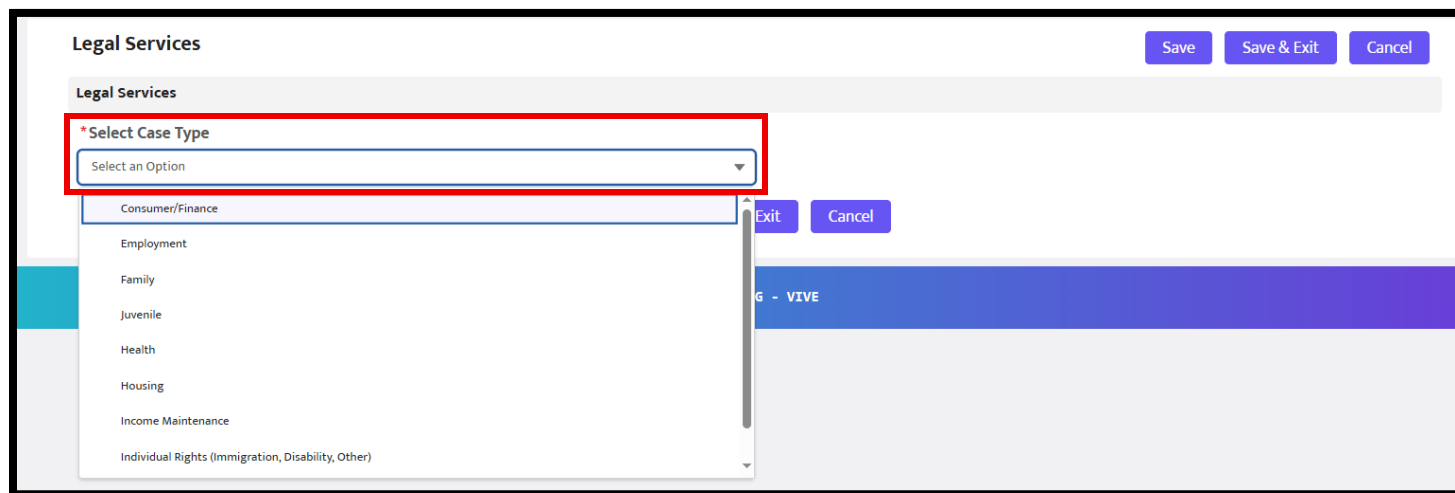
Showing 1 of 1 Page(s) Total Records: 1

Step 1: To access the **Legal Assistance Form** you will need to select the name of your organization under the **Enrollments** tab, which in this screenshot highlighted in the red box.



The screenshot shows the VIVÉ Department for the Aging interface. The user is logged in as Joyce Chin and working in the Legal Assistance - JASA - Queens program. The 'Enrollment' tab is selected, and the 'Legal Services' sub-section is highlighted with a red box. The 'New' button is also highlighted with a red box.

Step 2: In the new tab, select the **Forms** sub-section. From there, click **New** to retrieve the form.



The screenshot shows the 'Legal Services' form. The 'Select Case Type' dropdown menu is open, showing a list of case types. The 'New' button is highlighted with a red box.

Step 3: Select the **Case Type** from the drop-down menu.

Legal Services

Save

Save & Exit

Cancel

Legal Services

*Select Case Type

Consumer/Finance

*Consumer/Finance

☐ 01. Obtained federal bankruptcy protection
☐ 02. Stopped or reduced debt collection activity
☐ 03. Avoided, ended or reduced garnishment or levy
☐ 04. Resolved credit reporting errors
☐ 05. Avoided or delayed utility termination, or secured utility services
☐ 06. Obtained waiver or reduction of utility arrearage (including phone)
☐ 07. Obtained advice & counsel on a Consumer matter
☐ 08. Obtained non-litigation advocacy services on a Consumer matter
☐ 09. Obtained referral on a Consumer matter
☒ 10. Obtained other benefit on a Consumer matter
☐ 11. Overcame Predatory Lending Practice
☐ 12. Obtained insurance benefits (other than health or disability)
☐ 13. Obtained protection from financial abuse (by non-family members)
☐ 14. Submitted complaint to regulatory agency

Step 4: Each **Case Type** category will populate applicable check boxes. Check any and all boxes that reflect the level of service that was provided and outcome of the matter.

* Case Status

Select an Option

Open

Closed

Rejected

Step 5: Select **Case Status**.

* Case Status

Open

* Date Case Opened

11/3/2025

Level of Service

Select an Option

Advice

Limited Representation

Representation

N/A

Step 6: Enter the date for when the case was opened and closed (if the case status is closed). Then select **Level of Service** to indicate the level of service provided from the drop down menu.

Legal Services

Legal Services

*Select Case Type
Consumer/Finance

*Consumer/Finance

☐ 01. Obtained federal bankruptcy protection
☐ 02. Stopped or reduced debt collection activity
☐ 03. Avoided, ended or reduced garnishment or levy
☐ 04. Resolved credit reporting errors
☒ 05. Avoided or delayed utility termination, or secured utility services

☐ 06. Obtained waiver or reduction of utility arrearage (including phone)
☐ 07. Obtained advice & counsel on a Consumer matter
☐ 08. Obtained non-litigation advocacy services on a Consumer matter
☐ 09. Obtained referral on a Consumer matter
☒ 10. Obtained other benefit on a Consumer matter

☐ 11. Overcame Predatory Lending Practice
☐ 12. Obtained insurance benefits (other than health or disability)
☐ 13. Obtained protection from financial abuse (by non-family members)
☐ 14. Submitted complaint to regulatory agency

*Case Status
Open

*Date Case Opened
11/3/2025

Level of Service
Advice

Save Save & Exit Cancel

Save Save & Exit Cancel

Step 7: Click **Save** or **Save & Exit** to record the entry or cancel to exit the form without saving.

NOTE: Please prioritize completing this form and place less emphasis on the service-provided code for closing enrollment.

Closing Enrollment

Once all of a client's case matters have been resolved and a Legal Assistance Form has been submitted for each case type, their enrollment may be closed by clicking **Closing Enrollment**.

Enrollment
Legal Assistance - BLS - BK, MN, & SI

Assign Worker On Hold Closing Enrollment

Contact
Alisia ARLegal

Assigned To

Next, enter the **Closing Date**, select a **Closing Code** from the drop-down menu, and type in the **Closing Reason** for the enrollment.

Closing Enrollment

* Closing Date

* Closing Code

Select Closing Code

- Deceased
- Client dissatisfied with service
- Client moved out of the service area
- Client refused services
- Revoked Consent
- Service provided - details in closing form**
- Unable to serve. No longer appropriate (client behavior, mental, cognitive, or physical status)

NOTE: The most common reason for closing enrollment is "Service provided."

Event Unit Entry

VIVÉ allows you to create and manage both one-time and recurring events and activities. It supports entering units. For more information, refer to the [Events guide](#) in the VIVÉ Knowledge Base.

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Client Search Referral Queue **Program Tools** Admin Tools Reports More

Logged in user is Joyce Chin and working in Legal Assistance - JASA - Queens program.

Event Profile Monthly Unit Summary Ticketing Module

Active Event (8)

New Event Profile

	Event Name	Host Type	Event Type	Unit Type	Event Start Date	Event End Date
1	Legal Program Advocacy	In-Person	Aggregate	Hour	09/29/2025	
2	Legal Services Tabling	In-Person	Aggregate	Hour	09/30/2025	
3	Legal Services Training	In-Person	Aggregate	Hour	09/29/2025	

Step 1: Click on **Program Tools** to then click on **Event Profile** tab to access events.

Step 2: Clicking on an **Event Name** link under the **Active Event** menu will allow you to view the event details and add units to the event. Clicking on **New Event Profile** will allow you to create a new event, which may be one-time or ongoing.


Event Profile
Legal Program Advocacy

Host Type	Event Type	Unit Type	Start Date	End Date
In-Person	Aggregate	Hour	9/29/2025	

Details
Unit Entry

Event Name	Status
Legal Program Advocacy	Open
Start Date	End Date
9/29/2025	
Event Start Time	Event End Time
Host Type	Service Type
In-Person	Legal Ancillary - Advocacy

Step 3: Click on the **Unit Entry** tab to enter information under **Total Units**, **Total Clients**, and **Funding Source**.

Unit Entry

Event Details

Event Profile	Event Type
 Anonymous Test	Aggregate
Event Location	Unit Type
105 COURT STREET, BROOKLYN, NY 11201	Hour
Fee Amount	Event Manager

Unit Entry Details

*Date of Occurrence	*Status
Nov 19, 2025	Draft
*Total Units	*Total Clients
Total \$	*Funding Source
	--None--

Cancel
Save

Entering Anonymous Units

To record bulk anonymous units for Public Information activities and to record service units for information and assistance provided at clinics and tabling events, use Event Profile or create a new event. Follow previous steps from **Event Unit Entry** outlined above.

To record service units provided to an individual who must remain anonymous, follow the Unit Entry guidance and use the following convention:

- First name: use the assigned de-identified client ID that is generated by Legal Server
- Last name: use the program’s acronym (i.e., JASA, BLS, or BxLS)
- Date of Birth: at least 60 years old (01/01/1965)
- Address: use the site’s address

If client provides consent later, programs can update the client profile information to reflect the client’s name, address, and DOB.

Monthly Unit Summary

The **Monthly Unit Summary** reports the summary of units recorded in a month and must be included with the monthly invoice. The report should not be finalized until all client service and event units have been confirmed. ***Once a report is finalized, units can no longer be entered or edited. If you need to unlock a Monthly Unit Summary in order to edit or add a unit(s), contact your program officer.***

Step 1: From the **Top Menu**, click on **Program Tools**. Then click on **Monthly Unit Summary**.

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Client Search Referral Queue **Program Tools** Admin Tools Reports More

20+ Patria Alguila

Logged in user is Patria Alguila and working in Legal Assistance - JASA - Queens program.

Event Profile **Monthly Unit Summary** Ticketing Module

Monthly Unit Summary (1)

Name	Month	Year	Created Date	Status
MUS-000038	September	2025	09/29/2025	Draft

New

Step 2: Click on either a draft **Name** link or the **New** button.

Step 3: If you select the **New** button, you must select the month and year. Then calculate the units for that period.

Monthly Unit Summary

*Program Legal Assistance - JASA - Queens

*Status Draft

*Month October

*Year 2025

Total Cost Center Amount

Calculate Units

TIP: To print the Monthly Summary Unit, use the print option from the browser or print screen option.

If you select an existing Monthly Unit Summary, you will be able to see the units collected for the month selected. If there are additional units that have been added since the report was generated, click the **Recalculate** button to include all entries in that month's totals.

NOTE: Once a report is finalized, there can be no more additions, deletions or other changes. If you need to make any changes, contact your program officer.

Reports

Reports are still being finalized within VIVÉ. The first set available are the common reports used across all programs. Additional programmatic reports will be announced as they become available. For more information, refer to the [Reports guide](#) in the VIVÉ Knowledge Base.

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.