

## VIVÉ Elder Justice Supplemental Intake Update

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NYC Aging has updated the Elder Justice VIVÉ module to allow users to document Case Actions directly in the Case Actions Due Date tab to satisfy upcoming or overdue due dates. When entering these actions, users will be able to document the action performed, date of action/service, case note and unit entry directly from within the Case Actions Due Date tab. This will increase efficiency and eliminate opportunity for user error in documenting actions.

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:

- **Enhanced Case Action Due Dates tab (within "Forms" section)**
- **Editing Case Notes and Unit Entries**
- **Entering Case Notes and Unit Entries Unrelated to Case Action Due Dates**

## Enhanced Case Action Due Dates Tab (within “Forms” section)

Effective 10/1/26, all case actions related to monitoring due dates, including corresponding case notes and unit entries will be documented within the Case Actions Due Date tab in VIVÉ.

Case Actions can only be documented if there is a corresponding monitoring item/due date in the Case Action Due Dates tab that has not yet been performed.

When cases are first enrolled in your program module, users must first enter a Supplemental Intake to generate new Client Outreach and Supervision due dates before these actions can be documented in the Case Actions Due Date tab.

REMINDER: The Supplemental Intake date **MUST** match the date your program received the referral and high-risk criteria must be selected if applicable.

**Supplemental Intake** [Reset] [Cancel] [Save]

**Details**

\*Date (MUST match date referral was received by Program)  
9/1/2026

Worker  
Molly Bernstein

**Source of referral**

- ☐ 311
- ☐ Anonymous
- ☐ APS
- ☐ Bank
- ☐ Case Management
- ☐ Agency
- ☐ Community Presentation
- ☐ Elder Abuse/Crime Victim
- ☐ Campaign
- ☐ Elected Official
- ☐ Family Member
- ☐ Friend/Neighbor
- ☐ Government
- ☐ Home Care Provider
- ☐ MLTC
- ☐ NY Connects
- ☐ NYPD MOU
- ☐ Older Adult Center
- ☐ Other
- ☐ Police
- ☐ Religious Institution

**\*High Risk Type**

- ☐ Self-referral by client
- ☒ Referral received from NYPD
- ☐ Physical Abuse suspected or alleged
- ☐ Lack of access to food and/or water
- ☐ Order of Protection in place OR being sought
- ☐ None

After you’ve entered the Supplemental intake, new monitoring items and corresponding due dates will appear on the Case Action Due Dates tab. As the case progresses, each action performed will generate a new/future case action and corresponding due date in the Case Actions Due Date tab.

To document an action performed, click on the “Monitoring Name” of the Case Action you wish to document.

**Case Actions Due Date (Test)**

Reminder: To resolve outstanding due dates, actions MUST be entered via the Case Actions Due Date tab

Case Action Due Dates (4) [New Case Note Type Other]

|   | Monitoring Name | Monitoring Type          | Action Assigned | Monitoring Due Date | Action Performed | Action Performed Date |
|---|-----------------|--------------------------|-----------------|---------------------|------------------|-----------------------|
| 1 | M-5069          | Initial Outreach Attempt | Assigned worker | 09/02/2026          |                  |                       |
| 2 | M-5070          | Outreach Call 2          | Assigned worker | 09/08/2026          |                  |                       |

## VIVÉ Knowledge Base – Elder Justice

Once opened, users can document the Action Performed, Action Performed/Service Date, Service Unit information and Case Note information within the same screen.

Enrollment Details Forms Assessments Event Signup Case Notes Unit Entry Follow up Contacts Documents Status History

Supplemental Intake High Risk Case Actions Due Date (Test)

Monitoring M-5069 [← Back to List](#)

Monitoring Type: Initial Outreach Attempt

Action Assigned: Assigned worker

\*Monitoring Due Date: Sep 2, 2026

\*Action Performed: Select an Option

\*Action Performed / Service Date:

\*Service Type: Select an Option

\*Host Type: Select an Option

\*Time Spent: Select an Option

Total Units:

\*Case Note Subject:

Case Note Service Date:

\*Case Notes:

☐ Confirm all data is accurate and lock this record

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

To minimize user error, only actions related to the specific monitoring item will be reflected in the “Action Performed” drop-down menu. For example, to document that Initial Outreach Attempt was completed, the only actions available to select is that Initial Client Contact was either Attempted or Successful (see below).

Monitoring M-5069

Monitoring Type: Initial Outreach Attempt

\*Action Performed: Select an Option

Initial Client Contact- Attempted

Initial Client Contact- Successful

After all information has been entered, users will receive a pop-up window asking them to confirm that the Action and Date of Service they’re entering is accurate. Users **MUST** ensure these fields are accurate before saving them in VIVÉ. Once confirmed and saved, users **CANNOT** edit the Action Performed or Date of Service.

Confirm Lock

Please confirm the below is accurate. Once confirmed, you cannot edit the action performed or date of service.

Action  
Initial Client Contact- Attempted

Date of Service  
9/1/26

[Cancel](#) [Confirm](#)

## VIVÉ Knowledge Base – Elder Justice

Once saved, the Action information will reflect in the Case Actions Due Date tab, Case Note information will reflect in the Case Notes tab, and Unit information will reflect in the Unit Entry tab.

Supplemental Intake High Risk Case Actions Due Date (Test)

Monitoring M-5069 [← Back to List](#)

Monitoring Type: Initial Outreach Attempt

Action Assigned: Assigned worker

\* Monitoring Due Date: Sep 2, 2026

\* Action Performed: Initial Client Contact- Attempted

\* Action Performed / Service Date: Sep 1, 2026

\* Service Type: EA Case Assistance

\* Host Type: Telephonic

\* Time Spent: 15 min

Total Units: 0.25

\* Case Note Subject: Test1

Case Note Service Date:

\* Case Notes: Test1 left VM

☒ Confirm all data is accurate and lock this record

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

1. Action information is reflected in the Case Actions Due Date tab.

Supplemental Intake High Risk Case Actions Due Date (Test)

Reminder: To resolve outstanding due dates, actions MUST be entered via the Case Actions Due Date tab

Case Action Due Dates (4) [New Case Note Type Other](#)

|   | Monitoring Name | Monitoring Type          | Action Assigned | Monitoring Due Date | Action Performed                  | Action Performed Date |
|---|-----------------|--------------------------|-----------------|---------------------|-----------------------------------|-----------------------|
| 1 | M-5069          | Initial Outreach Attempt | Assigned worker | 09/02/2026          | Initial Client Contact- Attempted | 09/01/2026            |

2. Case Note information entered is reflected in the Case Notes tab.

Enrollment Details Forms Assessments Event Signup Case Notes Unit Entry Follow up Contacts Documents Status History

From: To: [Filter](#)

Case Notes (1) [New Case Note](#) [Print Case Notes](#)

|   | Subject | Note Type                   | Service Date | Status | Notes         | Program Name             | Own/Shared Note | Created By      | Created Date |
|---|---------|-----------------------------|--------------|--------|---------------|--------------------------|-----------------|-----------------|--------------|
| 1 | Test1   | Initial Client Contact- ... | 09/01/26     | Draft  | Test1 left VM | Elder Justice - SUNNY... | Own             | Molly Bernstein | 09/20/26     |

3. Service Unit information entered is reflected in the Unit Entry tab.

Enrollment Details Forms Assessments Event Signup Case Notes Unit Entry Follow up Contacts Documents Status History

Unit Entry (1) [New](#)

|   | Unit Entry # | Date of Occurrence | Service Type       | Funding Source       | Units | Amount | Created by      | Created Date | Source     | Status |
|---|--------------|--------------------|--------------------|----------------------|-------|--------|-----------------|--------------|------------|--------|
| 1 | UE-56779495  | 09/01/2026         | EA Case Assistance | NYC Aging Funded ... | 0.25  |        | Molly Bernstein | 09/20/2026   | Enrollment | Draft  |

Case Notes and Units entered via the Case Actions Due Date tab will be automatically linked in VIVÉ.

## Editing Case Notes and Unit Entries

Once Case Notes and Units have been entered and saved via the Case Actions Due Date tab, users can edit some data fields by accessing the case note via the Case Notes tab, and/or accessing the service unit via the Unit Entry tab and editing the field in question. In the Unit Entry tab, changes to the Service Type, Host Type and Time Spent fields can be made by opening the unit in question. In the Case Notes tab, changes to the Case Note Subject and Case Note fields can be made by opening the note in question and clicking on the pencil icon.

NOTE: Changes to the Service Date will **NOT** be reflected in the Case Actions Due Date tab.

## Entering Case Notes and Unit Entries Unrelated to Case Action Due Dates

To document case notes that are not related to case action due dates (e.g. case note type “Other”), notes must be added directly via the Case Notes tab. From the Case Action Due Dates tab, users can click the “New case Note Type Other” button to automatically navigate to the Case Notes tab.

From the Case Notes tab, click the “New Case Note” button and enter notes as usual. When entering case notes via the Case Notes tab, the only note type available is “Other.”

## VIVÉ Knowledge Base – Elder Justice

**New Case Note**

Service Date: Sep 20, 2026

Contact With: QuickGuideDemo QuickGuideDemo (Client)

Status: Draft

\*Note Type: Select Note Type (dropdown menu with 'Other' option)

\*Subject: [Text Field]

Notes: type notes here... (0 / 10000 characters)

REMINDER: Case Notes entered via the Case Notes tab will NOT be reflected on the Case Actions Due Date tab.

Notes entered via the Case Notes tab will **not** be automatically linked with Service Units. To do this, users must navigate to the Unit Entry tab, enter a new Service Unit and manually link it to the corresponding note.

**Unit Entry**

\*Date of Occurrence: Sep 1, 2026

\*Status: Draft

Enrollment: Elder Justice - SUNNYSIDE - Queens North

Client: QuickGuideDemo QuickGuideDemo

\*Service Type: Transportation (dropdown menu)

\*Funding Source: NYC Aging Funded Service

Host Type: In-Person

Unit Type: One-way Trip

\*Total Units: 1.00

Service Comments: Manual Unit Entry

Total \$: [Text Field]

**Case Notes**

| Subject           | Note Type | Contact Name                 | Service Date | Status | Created Date | Created Name    |
|-------------------|-----------|------------------------------|--------------|--------|--------------|-----------------|
| Manual Note Entry | Other     | QuickGuideDemo QuickGuide... | 09/01/2026   | Draft  | 09/20/2026   | Molly Bernstein |

## 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](#)