VIVÉ Elder Justice Supplemental Intake Update

NYC Aging has updated the Supplement Intake, created specialized case monitoring actions and follow-up logic, and enhanced the Case Action Due Dates tab to streamline the case note and unit entry process in many instances. 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.

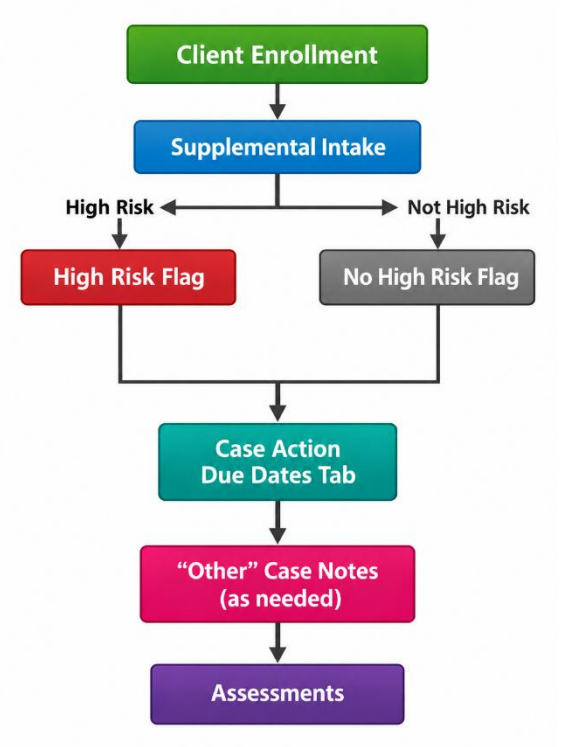
You may access this guide from the VIVÉ Knowledge Base. At the beginning and end of this document is a link to return to the VIVÉ Knowledge Base. For assistance with program operations or policy, please contact your program officer or view NYC Aging's Program's Standards.

In this guide you will learn about:

- **New High Risk Client Flow Diagram**
  - Client Enrollment
- **Updated Supplemental Intake**
  - Supplemental Intake Date
- **New High-Risk Tab**
- **Enhanced Case Action Due Dates Tab (within "Forms" section)**
- **Documenting Case Notes and Unit Entries Unrelated to Case Action Due Dates**
- **Case Action Definitions and Due Date Calculation Logic**
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- **"Live" Elder Justice Monitoring Report**

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.



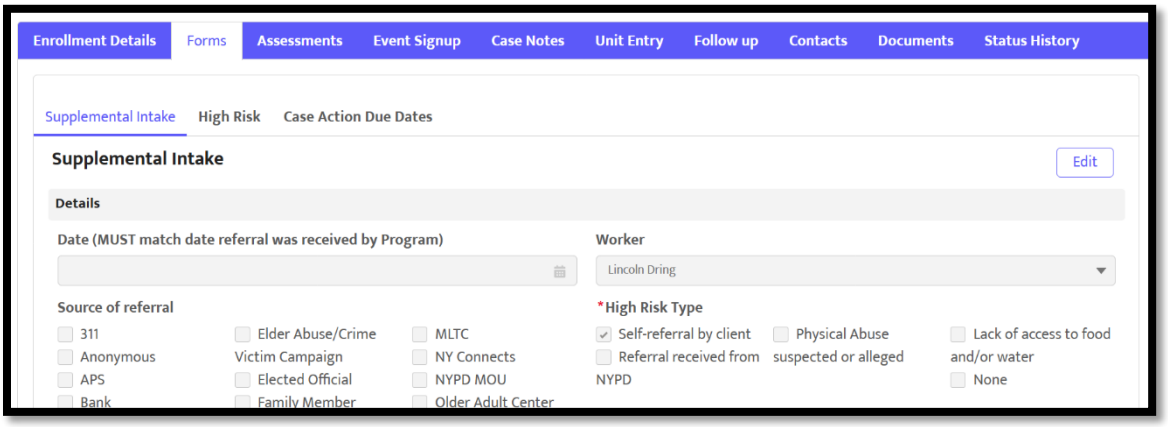
Client Enrollment

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, you must complete the updated Supplemental Intake form. Logic is built into this form to calculate whether the client is high risk and the due dates case actions required by the Program Standards. There are three critical improvements:

- The date field is now required as it triggers automatic case monitoring actions. This date **must** 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.

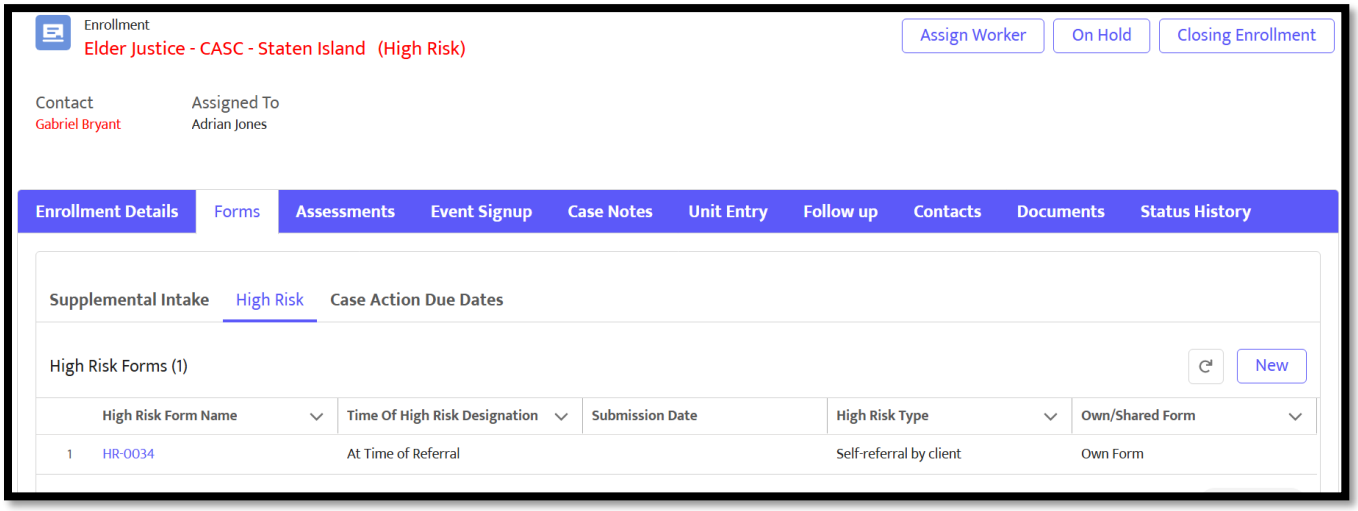
NOTE: The Elder Justice Program Standards require the Supplemental Intake to be entered within 1 business day of receiving the referral.

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 Elder Justice 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:

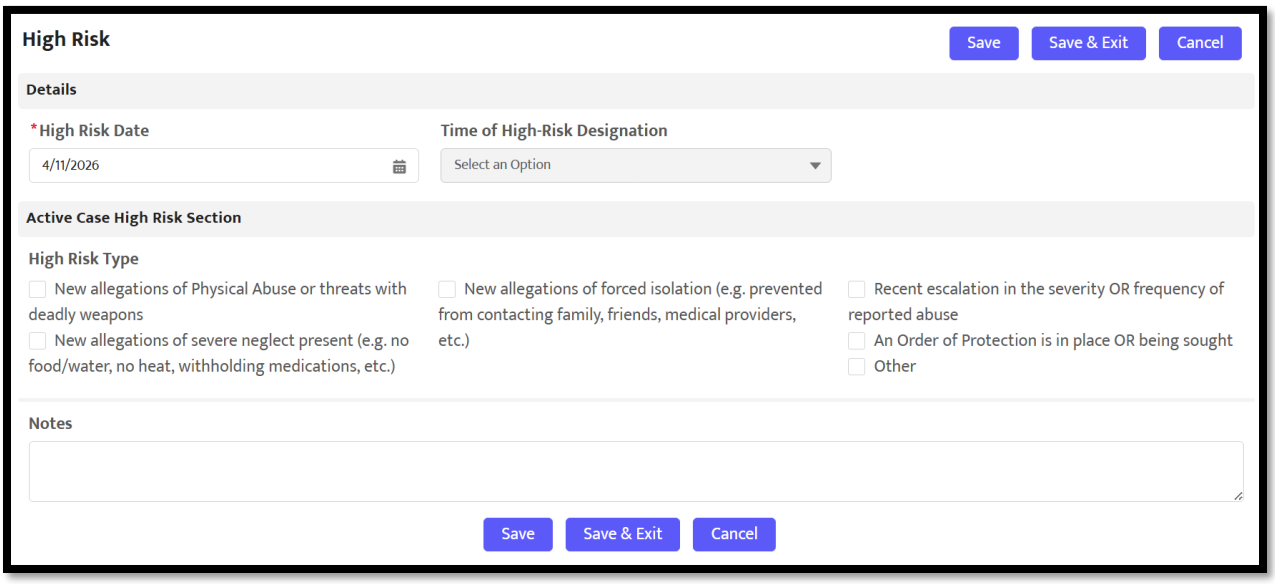
1) Automatically generate a due date for initial client contact 1 workday after the supplemental intake date, as required in the Program Standards, and

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 enrollment is inactivated.

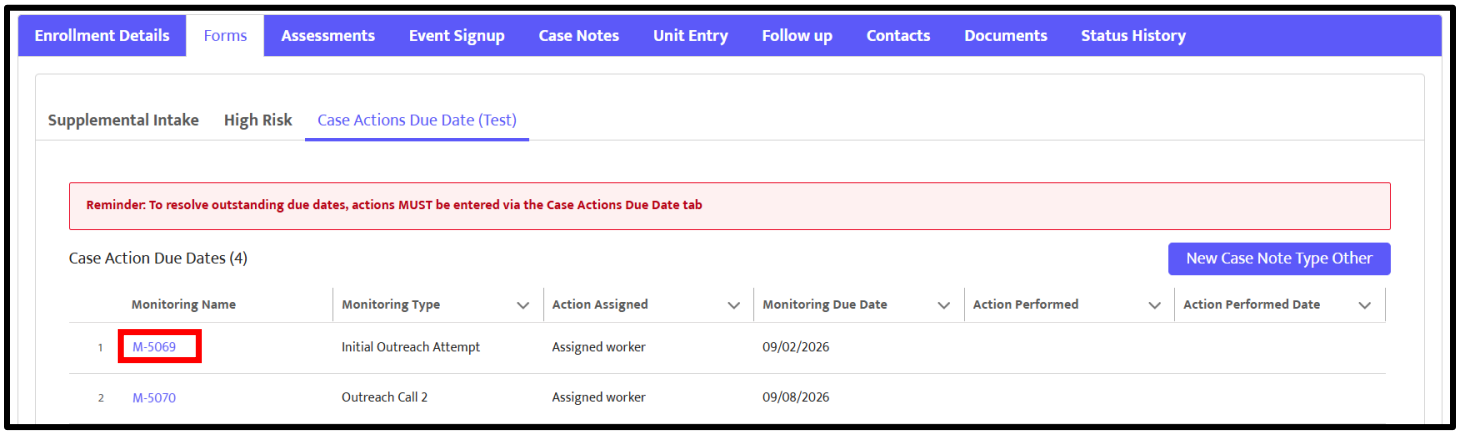
Enhanced Case Action Due Dates Tab (within “Forms” section)

VIVÉ will automatically generate due dates for various case actions required in the Elder Justice Program Standards, which went into effect on 5/1/26.

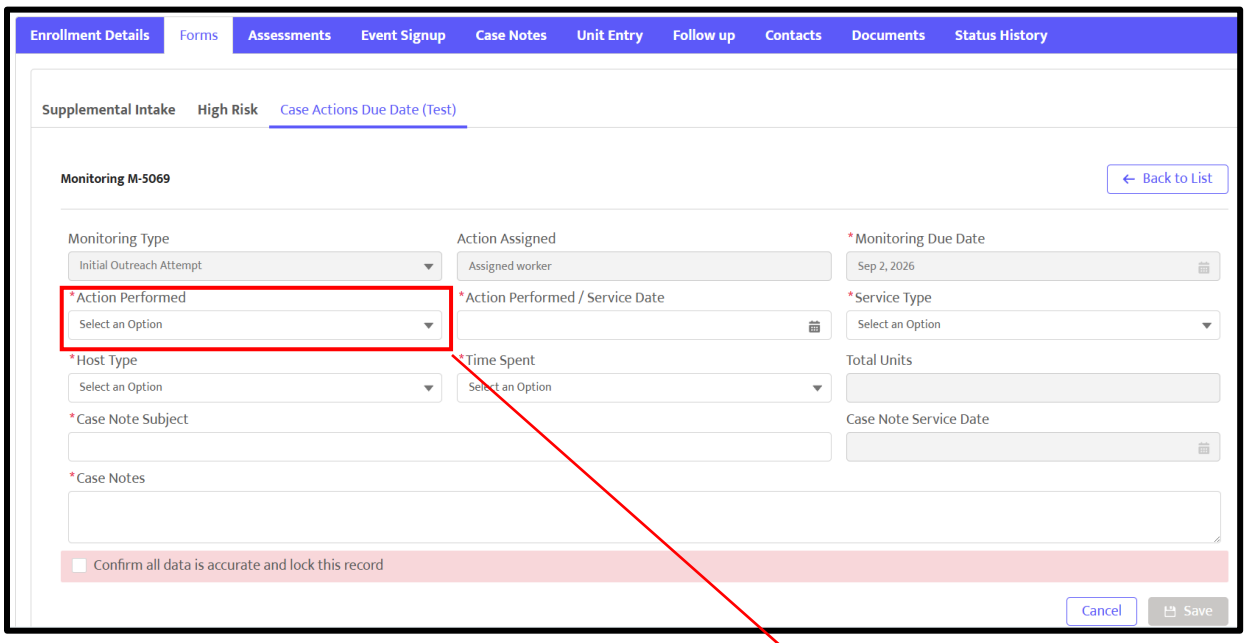
All case actions and associated due dates will be captured in the Case Action Due Dates tab. When programs enroll a client and complete the Supplemental Intake, VIVÉ will automatically generate the first Case Actions and associated Due Dates. As you document that required Case Actions have been completed, VIVÉ will automatically generate new due dates for subsequent case actions, as required by Program Standards.

Effective 10/5/26, 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 and due date in the Case Action Due Dates tab that has not yet been performed.

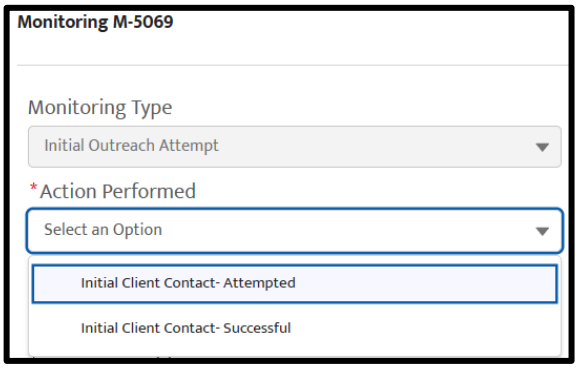
To document an action performed, click on the “Monitoring Name” of the case action you wish to document.



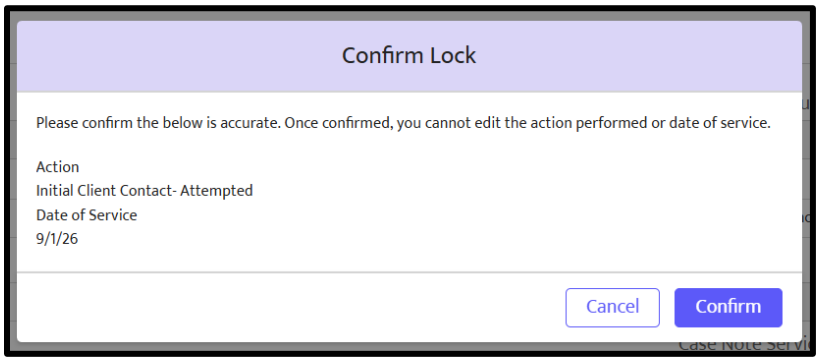
Once opened, users can document the Action Performed, Action Performed/Service Date, Service Unit information and Case Note information within the same screen.



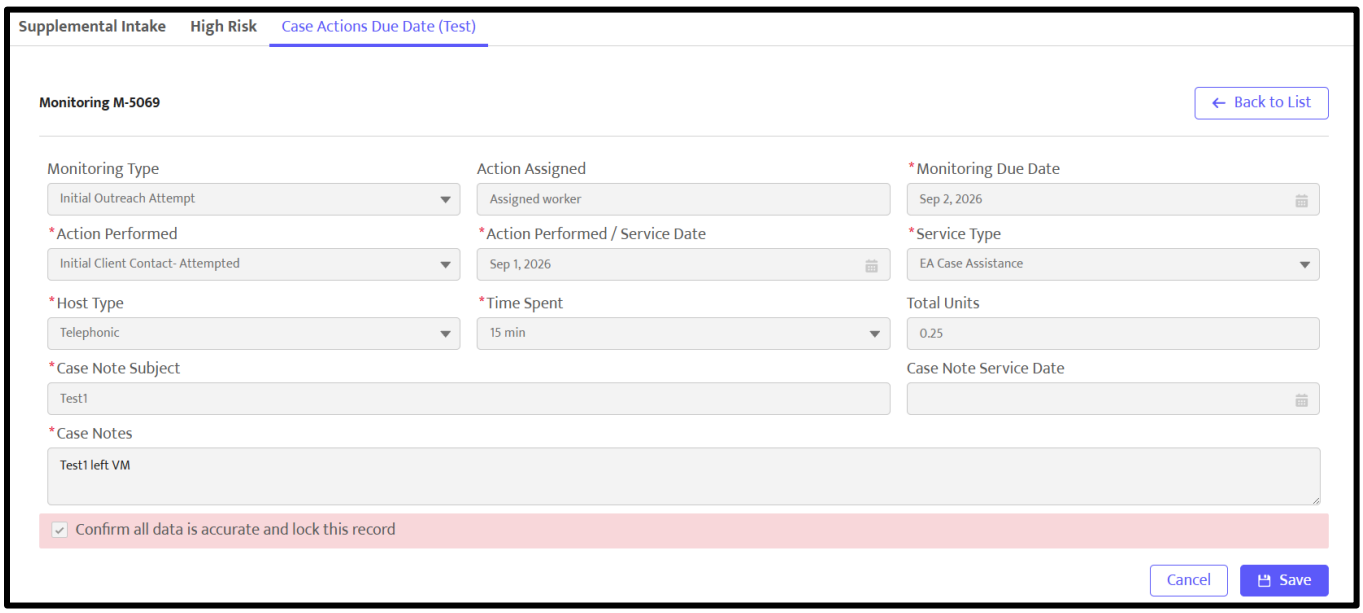
To minimize user error, only actions related to the specific monitoring item will be reflected in the "Action Performed" drop-down menu. For example, to document completion of an Initial Outreach Attempt, the only actions available to select are "Initial Client Contact- Attempted" and "Initial Client Contact- Successful."



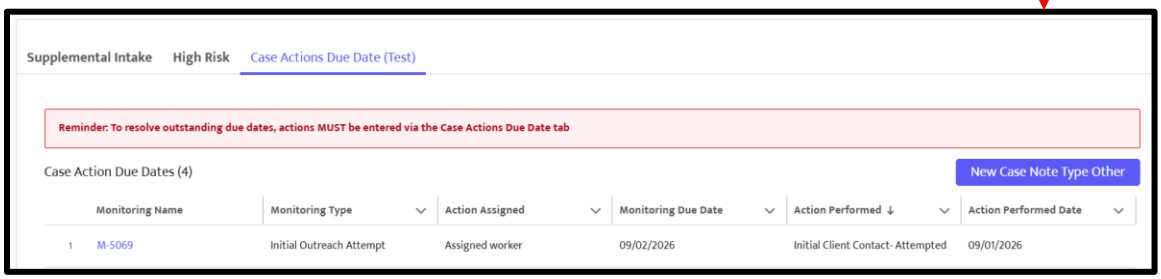
After all information has been entered, users will receive a pop-up window asking them to confirm that the Action and Date of Service they're entering is accurate. Users ***MUST*** ensure these fields are accurate before saving them in VIVÉ. Once confirmed and saved, users ***CANNOT*** edit the Action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



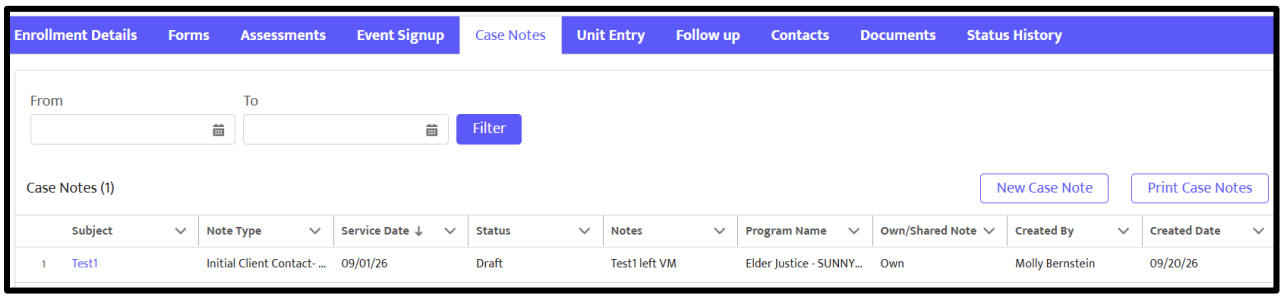
Once saved, the Action Performed information will reflect in the Case Actions Due Date tab, Case Note information will reflect in the Case Notes tab, and Service Unit information will reflect in the Unit Entry tab.



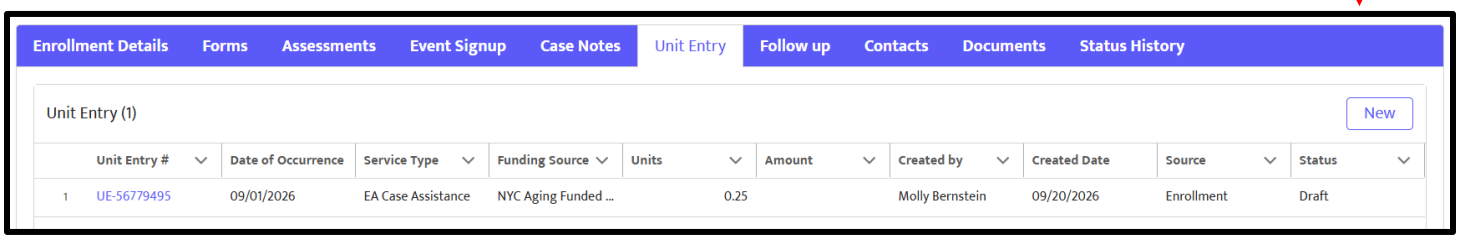
1. Action information is reflected in the Case Actions Due Date tab.



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



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



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

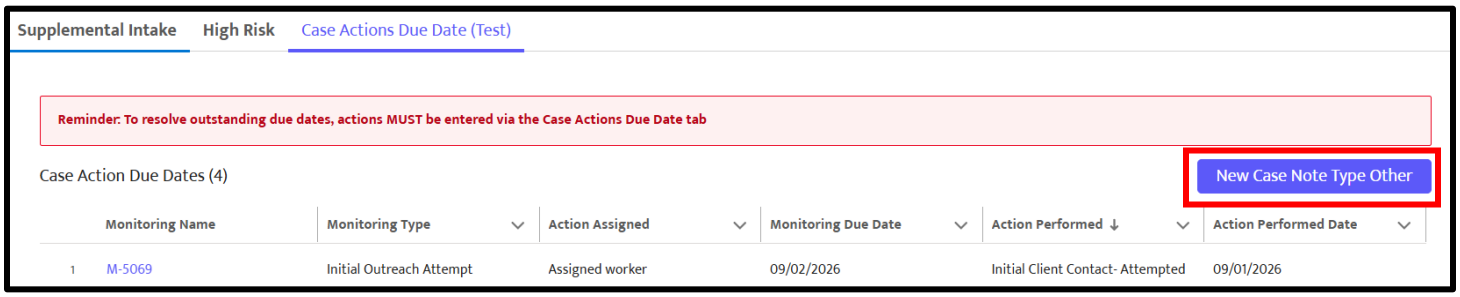
Documenting Case Notes and Unit Entries Unrelated to Case Action Due Dates

In many instances, Case Notes are documented from within the Case Action Due Dates tab, as explained in the section above. However, case notes and unit entries that do not relate to or resolve an outstanding case action due date cannot be documented via the Case Action Due Dates tab. In these instances, case notes must be entered from within the Case Notes tab using the case note type "Other."

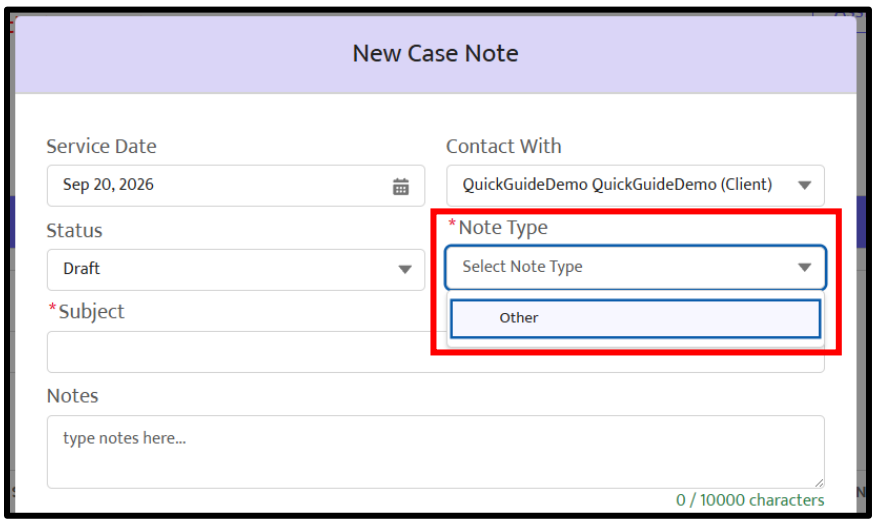
Examples of when it is appropriate to enter a case note via the Case Notes tab using case note type "Other" include:

1) You call a referral source to gather additional information about a client.
2) You call an ADA on behalf of your client to request a copy of an Order of Protection.
3) You are documenting that a Supplemental Service was provided, such as transportation or security device installation.
4) You are documenting that multiple types of service units were provided during one client contact. For example, during the assessment initiation you provided both EA Case Assistance and Individual Counseling. You documented the EA Case Assistance Unit when you completed the Assessment Initiation entry in the Case Action Due Dates tab and need to enter an additional case note to document that Individual Counseling units were also provided during the assessment initiation case contact.

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.

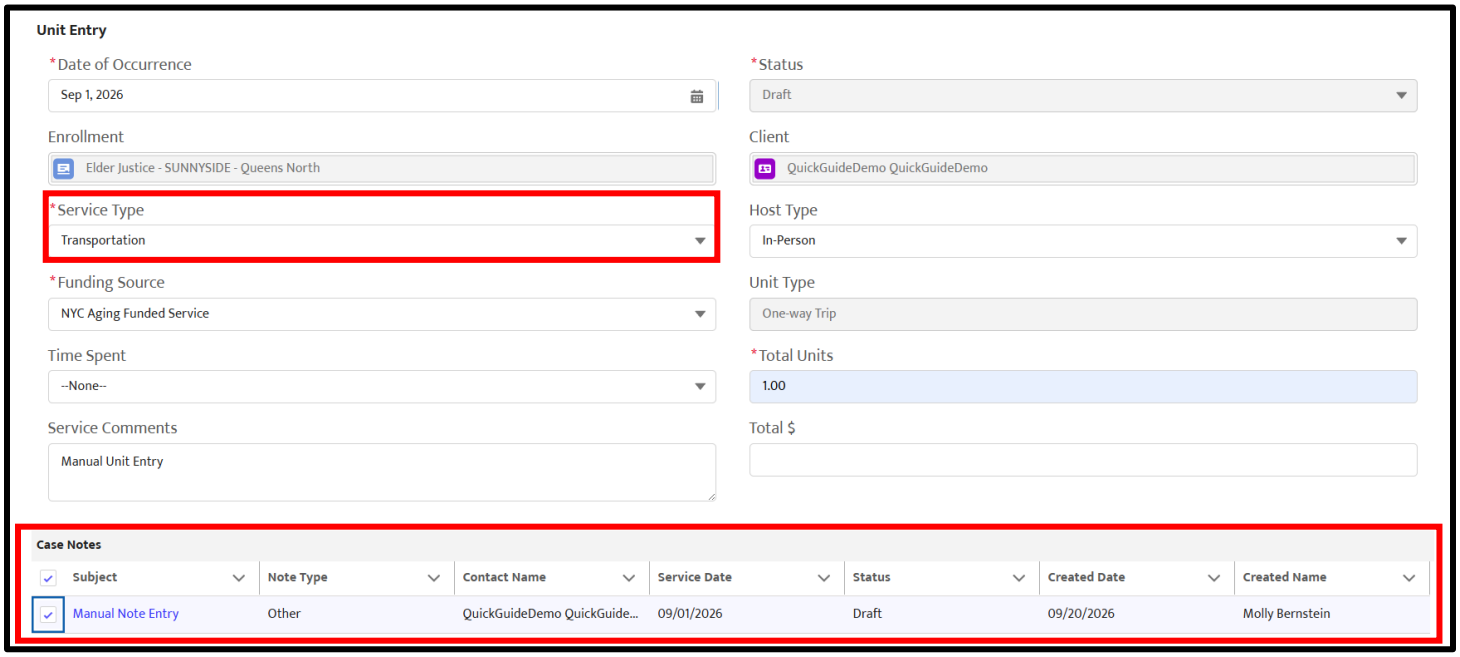


From the Case Notes tab, click the "New Case Note" button and enter notes as usual. When entering case notes via the Case Notes tab, the only note type available is "Other."



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.



Case Action Definitions and Due Date Calculation Logic

As described above, VIVÉ will automatically generate due dates for various case monitoring actions required in the Elder Justice Program Standards.

All case monitoring actions and associated due dates will be captured in the Case Action Due Dates tab. When you document completion of a case action, VIVÉ will generate a future Case Action with an associated due date.

The various case actions VIVÉ can generate are defined below, along with the logic used to calculate the due date(s):

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.

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.

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 twenty (20) workdays, beginning the date “Initial Client Contact- Successful” is documented.

Assessment Initiation

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

Due Date: five (5) workdays after “Initial Client Contact- Successful” is documented.

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: twenty (20) workdays after assessment initiation.

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 is submitted to supervisor for approval.

Assessment Re-Submission

Definition: if the supervisor returns an assessment to the assigned worker, the date by which the assigned worker must re-submit the assessment to the supervisor for re-review and approval.

Due Date: five (5) workdays after the supervisor returned the assessment to the assigned worker.

Assessment Re-Review

Definition: if the assigned worker re-submits an assessment to the supervisor, the date by which the supervisor must re-review the updated assessment for approval.

Due Date: five (5) workdays after the assessment was submitted to supervisor for approval.

Supervision

Definition: the date by which supervision must be completed.

Due Date: every 20 workdays, beginning from the Supplemental Intake date.

The table below outlines various case actions or VIVÉ documentation entries, and the subsequent case action due dates they generate.

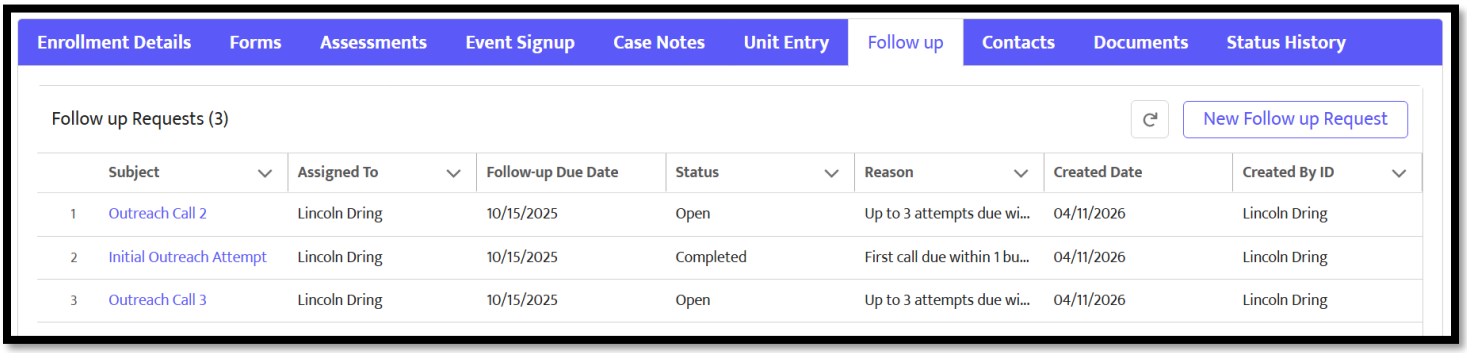
Case Action or VIVÉ Documentation Entry	Future Case Action Due Date(s) This Generates
Supplemental Intake	1. Initial Client Outreach 2. Outreach Call 2 3. Outreach Call 3 4. Supervision
Initial Client Contact- Attempted	N/A
Initial Client Contact- Successful	1. Assessment Initiation 2. Case Monitoring- Client Contact Made or Attempted
Case Monitoring- Client Contact Made or Attempted	1. Next Case Monitoring- Client Contact Made or Attempted
Supervision	1. Next Supervision
Assessment Initiated by Worker	1. Assessment Completion
Assessment Sent to Supervisor for Approval	1. Assessment Approval
Assessment Returned to Worker	1. A new “Assessment Completion” due date
Assessment Approved by Supervisor	N/A
“Other” Case Note	N/A

Follow Up Section

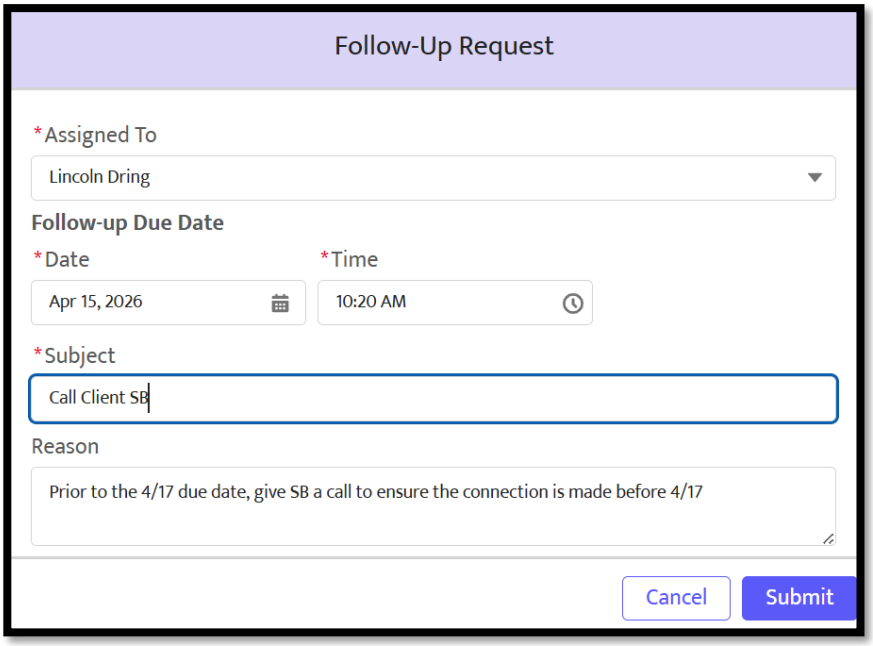
At any time, all case monitoring actions due within the next 5 weekdays will automatically appear in the Follow up tab within each Elder Justice client profile. This is a tool to help you quickly identify which due dates are approaching and require action for any given client.

Once a specific case action is performed and documented, 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 users primarily reference the Case Action Due Dates tab or the My Follow-Ups Dashboard Report (see section below) both of which include accurate case monitoring action due dates.



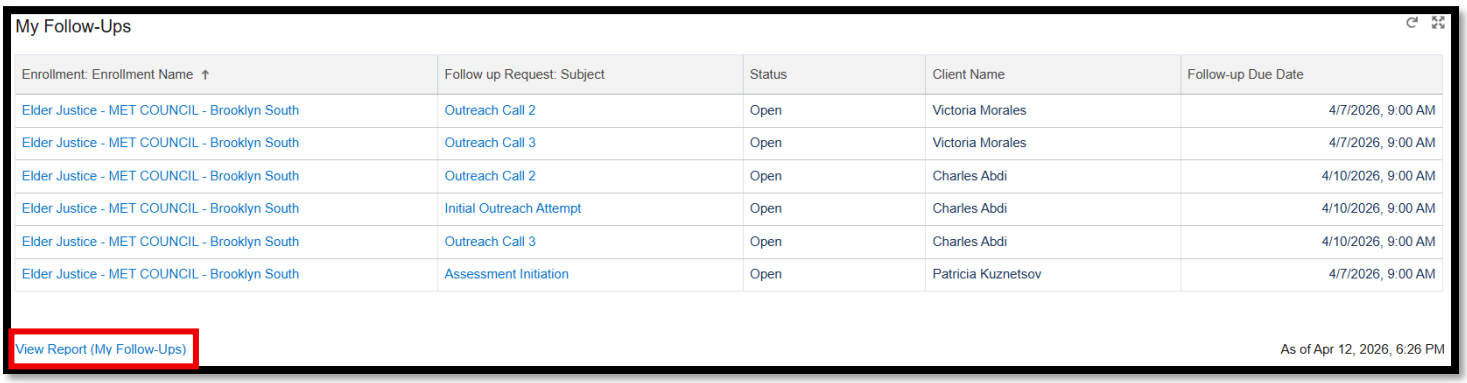
You may also manually add additional Follow Up items in this tab. For example, if an initial outreach call is not due until 4/17/26, but you want to call the client on 4/15/26, users can manually add a follow up item to remind them to call the client on 4/15/26. Manually added Follow Up items will appear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



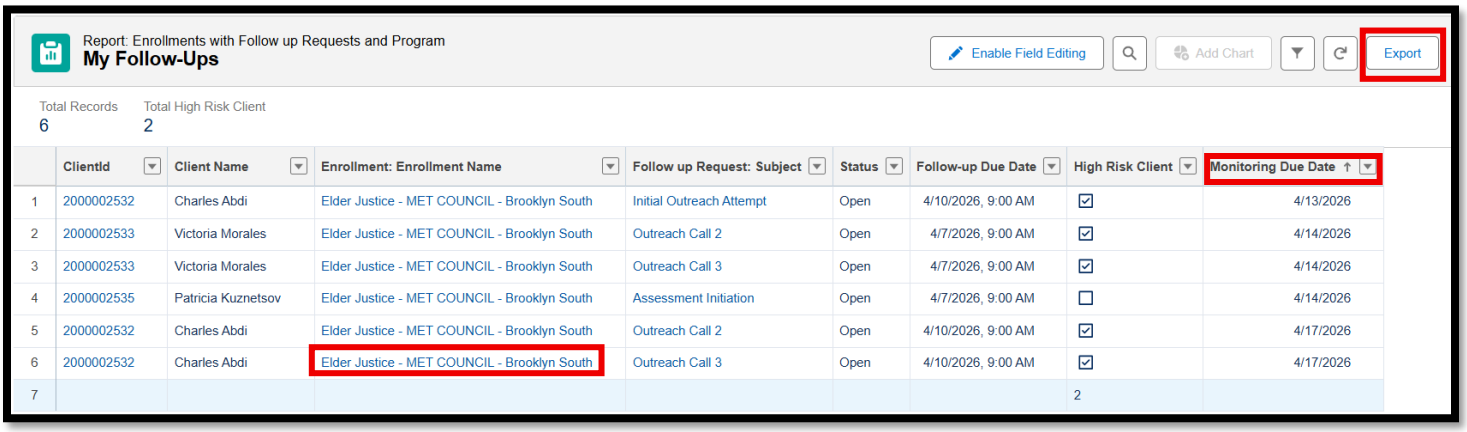
My Follow-Ups Dashboard and Report: Upcoming Due Date Reminders

For VIVÉ users with cases assigned to them, the "My Follow-Ups" Dashboard located on the VIVÉ home page serves as a reminder of upcoming case action due dates.

From the VIVÉ home page, scroll down to locate the "My Follow-Ups" section. 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.



NOTE: within the report, click on the "enrollment name" associated with each task to navigate straight to the client's Elder Justice enrollment page.

Supervisor Report: Upcoming Due Date Alerts

In addition to the assigned worker reports, all Elder Justice program directors and supervisors 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 reports also alerts program directors and supervisors to any missed due dates.

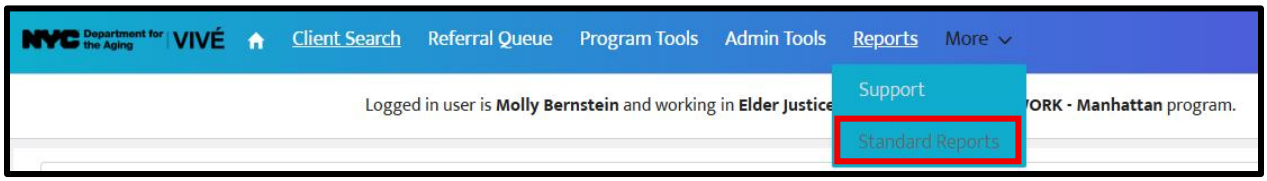
The daily supervisor's report, which can be filtered by assigned worker, case monitoring action due date and high-risk case status, is a tool to help program supervisors manage their staff and ensure that critical timeliness requirements and case actions are completed and documented in accordance with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

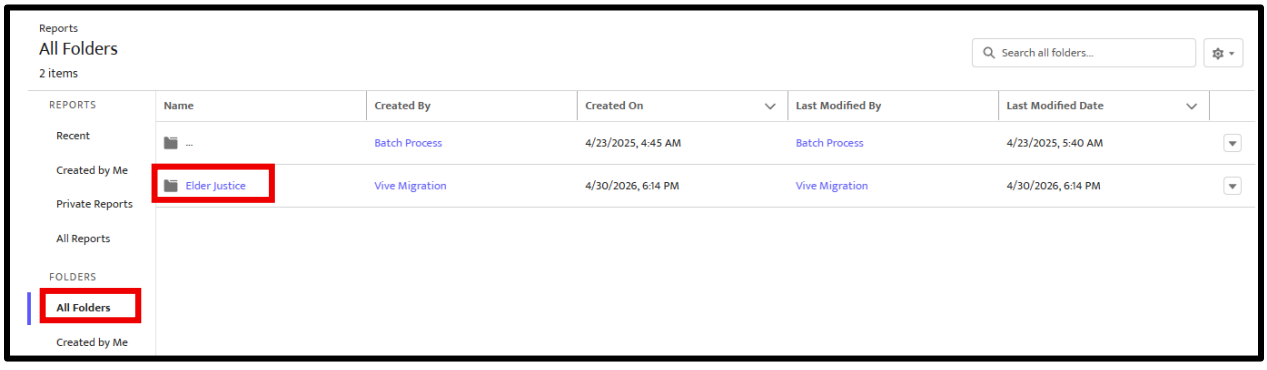
"Live" Elder Justice Monitoring Report

A live report of all Elder Justice case monitoring actions is also accessible to all provider staff in VIVÉ. Within VIVÉ, this report is called the "Monitoring Report." The Elder Justice Monitoring Report is a tool to strengthen daily program management and oversight.

To access the report in VIVÉ, click on "More" in the top banner and select "Standard Reports."

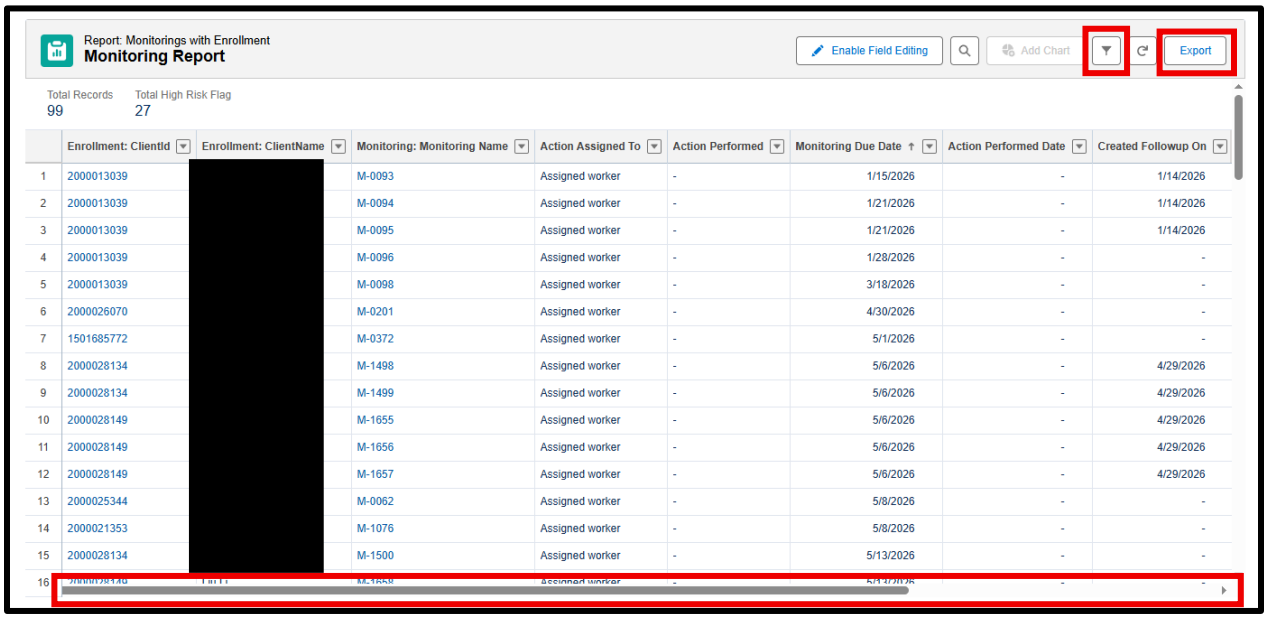


Next, click on "All Folders" → "Elder Justice" → "Monitoring Report."

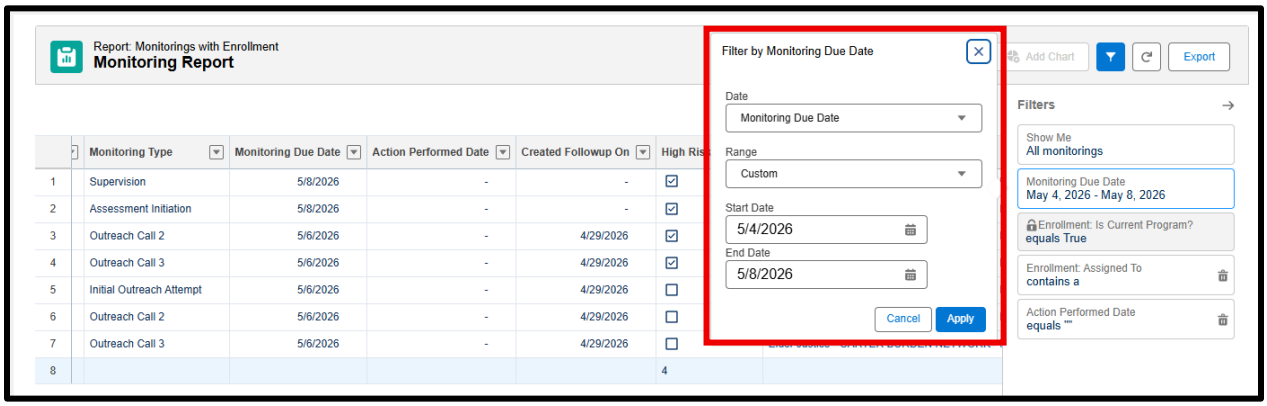


Note: Once you have accessed the Monitoring Report for the first time, it will begin to show in your "Recent" folder, which appears immediately after clicking on "Standard Reports" in the VIVÉ top banner.

Once you are in the Monitoring Report, there are several ways to filter and manipulate the report to fit your needs. Use the space bar at the bottom of the report to scroll right for additional columns and click on the “Filter” button (the funnel icon) to add different filters. You can also click on the “Export” button to download the report from VIVÉ.



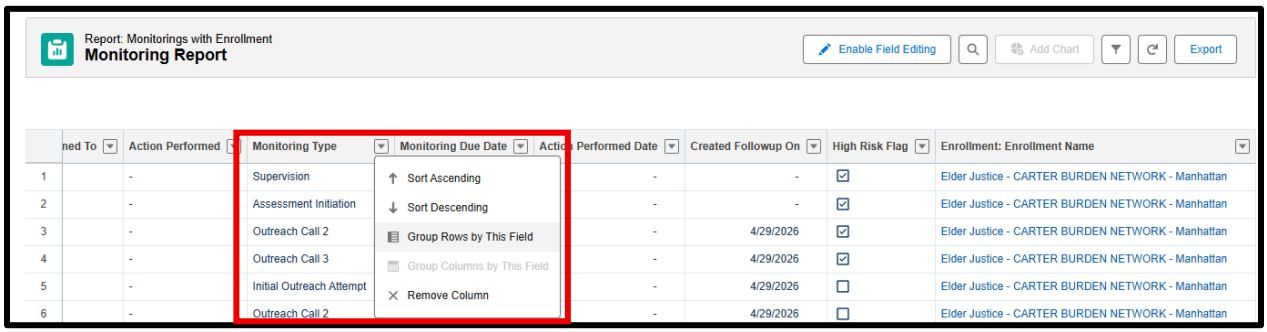
Once you’ve selected the “Filter” button, you can add filters based on your needs. The screenshot below filters the report to show all Monitoring Due Dates coming up in the next week, from Monday 5/4/26 through Friday 5/8/26. You can also add dates for previous time periods, to show case action due dates that are overdue/delinquent. Once you have selected your filters of choice, click “Apply.”



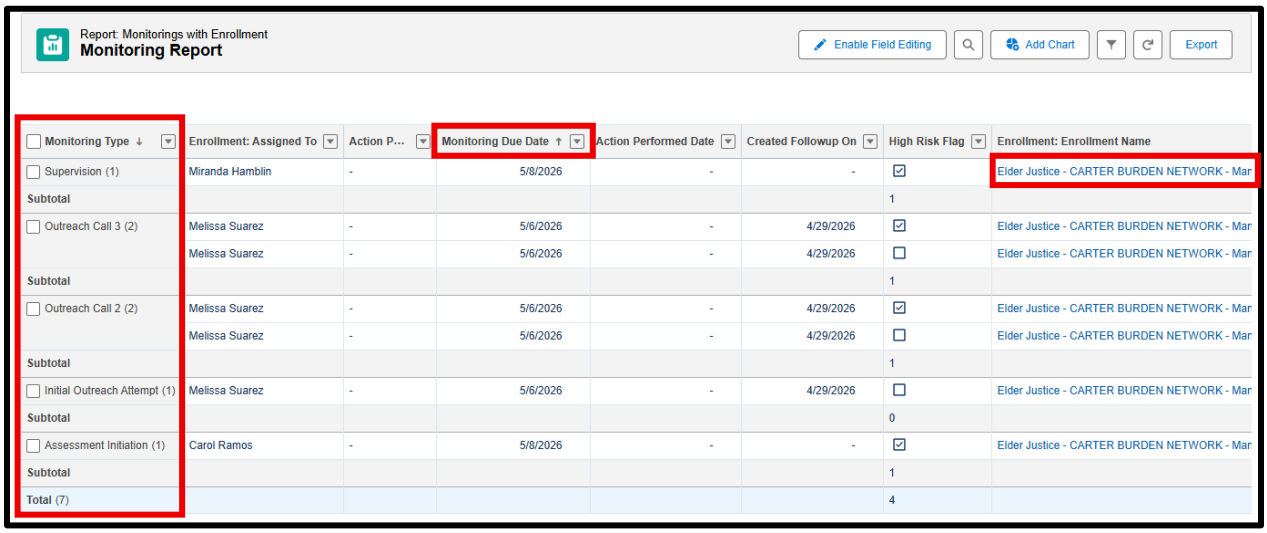
After you’ve filtered the report to fit your needs, you can sort each column within the report by clicking on the arrow icon next to the column header.

You can further customize the report view by clicking on the arrow icon next to each column header and selecting “Group Rows by this Field.” This will break the report out into various groups based on the data in the column you selected.

Of particular use for program supervisors, if you navigate to the "Monitoring Type" column and select "Group Rows by this Field" the report will be broken out based on monitoring type, e.g. based on each different case action type. You can then sort based on other fields, such as monitoring due date.



The screenshot below shows a report where the Monitoring Type field is grouped by row and sorted by ascending Monitoring Due Dates. This view will allow program supervisors to quickly see which cases have upcoming due dates that require supervisor action, such as upcoming supervision due dates and upcoming assessment review due dates.



Note: For all report views, if you click on the "Enrollment Name" VIVÉ will bring you directly to the client's Elder Justice enrollment page for quick access and documentation.

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