

VIVÉ Events 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 creating, enrolling, removing and other features of **Events**.

Events is a common, core functionality within VIVÉ. There may be some functionality specific to your program, such as entering anonymous units. Guidance on that functionality is within your program's reference guide.

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](#). You can also use your browser's back button to return to the program reference guide.

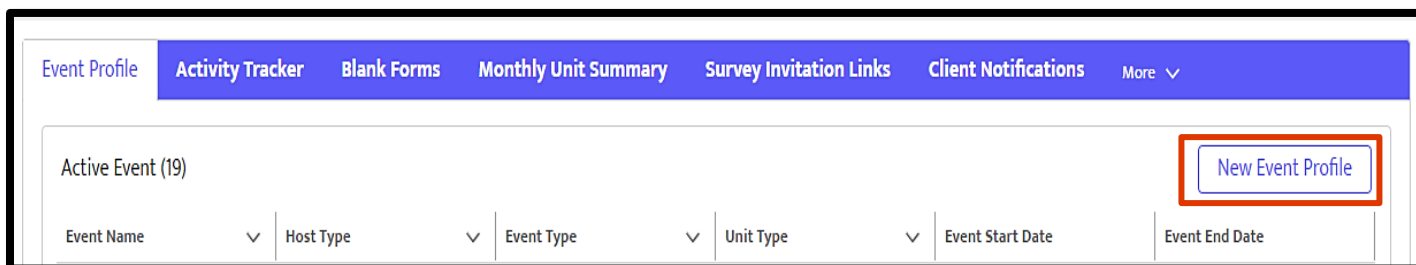
This guide provides navigational and functional instructions. For assistance with program operations or policy, please refer to your program officer or view [NYC Aging's Programs' Standards](#).

In this guide you will learn:

- **Creating Events**
- **Signing up Clients for an Event**
 - Signing up & Removing Clients via Event Profile
 - Sign up & Removing Clients via Enrollment Details Menu
 - Signing Up Client via QR Code Scan
- **Event Unit Entry**
 - Entering Units from the Events Profile
 - ☐ First, create a unit entry.
 - ☐ Editing an Existing Unit Entry
 - Enter Units By Scanning QR Codes
- **Entering Anonymous Units for Events**
 - Entering Anonymous Information & Referral Units
 - Entering Anonymous Meal Units
- **Monthly Unit Summary**

Creating Events

Step 1: From the **Top Menu**, click **Program Tools**. Then click the **Event Profile** tab. Then select the **New Event Profile** button.



Step 2: Complete the **New Event Profile** pop-up. The required fields are marked with a red asterisk (*).

- **Start Date** can be typed in or you can use the calendar icon to select a date.
- **End Date** is entered when the event will no longer be offered.
- **Event Name** Use clear, yet general, and concise names, e.g. weekday congregate meals.
- **Event Start Time** and **Event End Time** are optional.
- **Host Type** describes where the event took place.
- **Service Type** is critical as it defines the event's unit type.
- **Is this event happening at Program Site?** (*) auto fills the **Location** field when the response is Yes.
- **Location** is auto filled.
- **Unit Type** (*) is auto filled based upon your Service Type selection.
- **Event Capacity** is helpful when hosting an event in a small venue or when a large turnout is expected.
- **Fee Amount** is optional and occasionally used by programs that have a cost associated with an event (i.e. Discounted Broadway tickets).

NOTE: *Unit Type* will vary depending on the **Service Type**. For example, if “Arts and Culture” is selected for **Service Type**, then the **Unit Type** will default to “Event”.

Signing up Clients for an Event

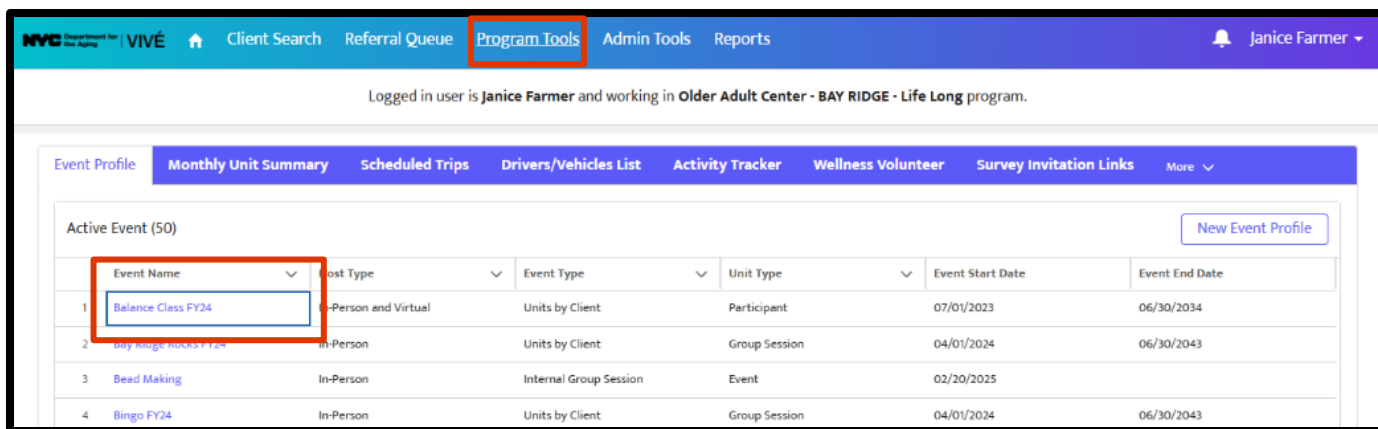
There are three ways to sign up a client enrolled in your program for an event.

- **Events Profile**
- **Enrollment Details** Menu
- **Scan QR Code** feature

Signing up & Removing Clients via Event Profile

Step 1: From the **Top Menu**, click on **Program Tools**

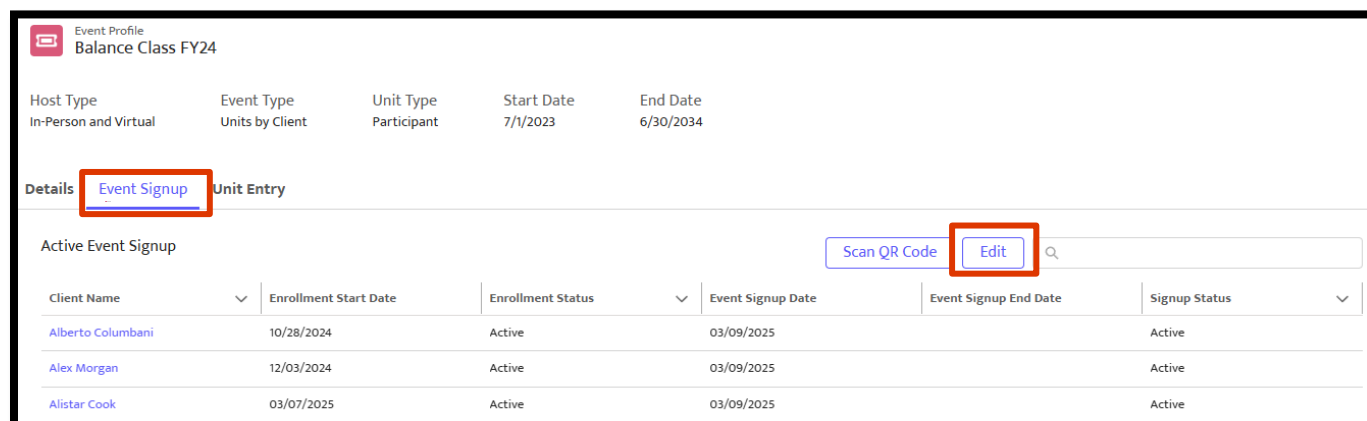
Step 2: From **Program Tools**, click the **Event Profile** tab. Then click the link to the name of event you wish to manage.



The screenshot shows the VIVÉ application interface. The top navigation bar includes 'Client Search', 'Referral Queue', 'Program Tools' (highlighted with a red box), 'Admin Tools', and 'Reports'. Below the navigation bar, a message states: 'Logged in user is Janice Farmer and working in Older Adult Center - BAY RIDGE - Life Long program.' The main content area displays the 'Event Profile' tab, which includes a sub-menu with 'Monthly Unit Summary', 'Scheduled Trips', 'Drivers/Vehicles List', 'Activity Tracker', 'Wellness Volunteer', and 'Survey Invitation Links'. A table titled 'Active Event (50)' lists events. The first event, 'Balance Class FY24', is highlighted with a red box.

Event Name	Host Type	Event Type	Unit Type	Event Start Date	Event End Date
Balance Class FY24	In-Person and Virtual	Units by Client	Participant	07/01/2023	06/30/2034
Bay Ridge Rock & Roll FY24	In-Person	Units by Client	Group Session	04/01/2024	06/30/2043
Bead Making	In-Person	Internal Group Session	Event	02/20/2025	
Bingo FY24	In-Person	Units by Client	Group Session	04/01/2024	06/30/2043

Step 3: Click **Event Signup**.



The screenshot shows the 'Event Profile' page for 'Balance Class FY24'. The page displays event details: Host Type (In-Person and Virtual), Event Type (Units by Client), Unit Type (Participant), Start Date (7/1/2023), and End Date (6/30/2034). Below the details, the 'Event Signup' tab is selected and highlighted with a red box. The 'Active Event Signup' section shows a table of clients who have signed up. On the right side of the table, there are two buttons: 'Scan QR Code' and 'Edit' (highlighted with a red box).

Client Name	Enrollment Start Date	Enrollment Status	Event Signup Date	Event Signup End Date	Signup Status
Alberto Columbani	10/28/2024	Active	03/09/2025		Active
Alex Morgan	12/03/2024	Active	03/09/2025		Active
Alistar Cook	03/07/2025	Active	03/09/2025		Active

Step 4: On the right you will see two buttons: **Scan QR Code** and **Edit**. Click on **Edit**

Step 5: You will see all the clients that are enrolled in your program with blank boxes to the left of their names. Clients who have already signed up for an event will have their boxes checked. Check the boxes for clients that you would like to sign up for this event.

Details Event Signup Unit Entry						
Active Event Signup Q						
<input checked="" type="checkbox"/>	Client Name	▼	Enrollment Start Date	Enrollment Status	▼	Event Signup Date
<input checked="" type="checkbox"/>	Aase I Bye		07/01/2024	Active		
<input checked="" type="checkbox"/>	Alberto Columbani		10/28/2024	Active		03/10/2025
<input checked="" type="checkbox"/>	Alex Morgan		12/03/2024	Active		03/10/2025
<input checked="" type="checkbox"/>	Alistar Cook		03/07/2025	Active		03/10/2025
						Signup Status
						Active
						Active
						Active

Step 6: To sign all the members up for an event at the same time, click the box next to **Client Name**

Step 7: When you are done adding clients to the event, click **Save**

- You will return to the **Event Signup** screen. You should be able to view the names of the clients you selected for the events on the **Active Event Signup** list.

Remove Client via Event Profile

To remove a client from that event, uncheck the box to the left of their name.

TIP You can always go back into the client's record to add, remove, or make updates to an event.

Sign up & Removing Clients via Enrollment Details Menu

Step 1: From the **Top Menu**, click **Client Search**, find the desired client and click their name link. Click the **Enrollments** tab and then the desired Enrollment Name link.

Step 2: From the **Enrollments Details Menu**, select **Event Signup**. Then click the **Event Signup** tab. A list will appear displaying the events the client is actively signed up for and those that have been inactivated.

Step 3: Click the **Edit** button to start the signup process.

Step 4: A list of all your **Events** created (both **Active** and **Inactive**) will display with boxes to the left of each event name. Check the box to the left of Event Name to select all events.

Event Name	Host Type	Event Type	Unit Type	Event Start Date	Event End Date	Event Signup Date	Event Signup End...	Signup Status
<input checked="" type="checkbox"/> Active Exercises FY...	In-Person	Units by Client	Participant	12/01/2024	06/30/2043			
<input checked="" type="checkbox"/> Afternoon Movies...	In-Person	Units by Client	Group Session	07/01/2024	06/30/2043			
<input checked="" type="checkbox"/> Art Pratt / MISC FY...	In-Person	Internal Group Ses...	Group Session	09/01/2024	06/30/2043			
<input checked="" type="checkbox"/> Arts and Crafts	In-Person	Internal Group Ses...	Event	03/11/2025				
<input checked="" type="checkbox"/> Balance Class FY24	In-Person and Virt...	Units by Client	Participant	07/01/2023	06/30/2034			

If the client is signed up for an event, the box to the left of the event name will be checked.

Step 5: Click the check box to sign a client up for the event. Select **Save** at the bottom of the page.

Removing Client via Enrollment Details

To remove a client from that event, uncheck the box to the left of their name.

Signing Up Client via QR Code Scan

Scanning a client's QR Code using a mobile device with a camera, such as a tablet, streamlines the process. QR Code scanning is done via a browser; Chrome or MS Edge are best.

NOTE: The client needs to be enrolled in your program before using the QR Code scanning.

Step 1: From **Top Menu**, click on **Program Tools**.

Step 2: From **Program Tools**, click **Event Profile**. Then click the link to the name of the event you wish to view.

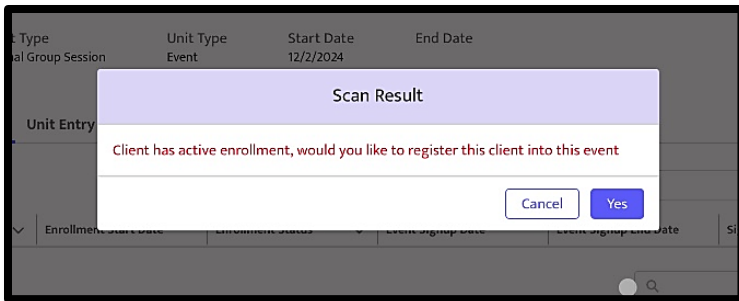
Step 3: Click **Event Signup** link. Then select **Scan QR Code** button. ([More information on QR Code Scanning](#))

Client Name	Enrollment Start Date	Enrollment Status	Event Signup Date	Event Signup End Date
Alberto Columbani	10/28/2024	Active	03/09/2025	
Alex Morgan	12/03/2024	Active	03/09/2025	
Alistar Cook	03/07/2025	Active	03/09/2025	

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Step 4: A window pane appears showing the image from the back facing camera of your device. Maneuver the camera so that the member's ID card is clearly within the windowpane.

Step 5: From the **Scan Result** pop-up, confirm signing client up for this event by selecting **Yes**.



Event Unit Entry

Once you have created and signed clients up for an event, you will be able to enter units for clients who have attended the event. (For more information see guide [Unit Entry](#)).

There are three ways to add units to an event:

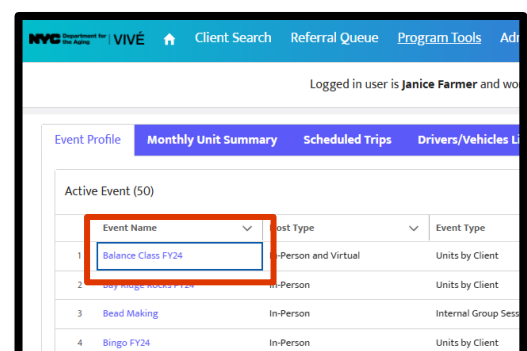
- Entering units from the **Events Profile** (good for entering units quickly for multiple clients).
- Entering a unit for a client from the **Enrollment Details** Menu.
- By using the **Scan QR Code** feature (most accurate way to enter units).

Entering Units from the Events Profile

First, create a unit entry.

Step 1: From the **Top Menu**, click on **Program Tools**.

Step 2: From **Program Tools**, click **Event Profile**. Then click the link to the name of event you wish to manage.



Details Event Signup Unit Entry										
Unit Entry (4)										
	Unit Entry #	Date of Occurrence	Service Type	Total Clients	Total Units	Total \$	Created by	Created Date	Source	Status
1	UE-7947901	02/14/2025	Physical Health/Ex...	1	1		David Dring	03/10/2025	Event	Draft
2	UE-5349891	02/01/2025	Physical Health/Ex...	2	0		David Dring	02/02/2025	Event	Voided
3	UE-5349890	01/29/2025	Physical Health/Ex...	2	2		David Dring	02/02/2025	Event	Final

Step 3: Click **Unit Entry**. Then select the **New** button.

Step 4: From the **Unit Entry Details** page, add the date the event occurred. This can be backdated.

Step 5: Either browse through the list of signed up clients or use the filter to find the client you want to check attended.

Step 6: Either enter the units using the Auto Fill or individually by client.

- Enter Funding Source, Units and Amount (optional) then select **Auto Fill** if it is the same for everyone. Also, check the Select all Attended to mark each attended box.
- Enter the Funding Source, Units, Amount (optional) and check the attended box for each client.

Name	Date of Birth	Gender	Home Address	Enrollment Status	Funding Source	Units	Amount	Attended?
Alberto Columbiani	02/19/1959		8402 4TH AVE, B-7, BROOKLYN, NY 11209	Active	NYC Aging Funded Service	1	0	<input checked="" type="checkbox"/>
Alex Morgan	12/31/1944		10 READE STREET, MANHATTAN, NY 10007	Active	Discretionary Funded	1	0	<input checked="" type="checkbox"/>
Alistar Cook	03/02/1944		455 GERARD AVENUE, 7, BRONX, NY 10451	Active	--None--	0	0	<input type="checkbox"/>
Amy Adams	12/31/1949		15 BAY RIDGE AVENUE, 58, BROOKLYN, NY 11220	Active	--None--	0	0	<input type="checkbox"/>
Katie Client	12/31/1949		541 EAST 20TH STREET, 38, MANHATTAN, NY 10010	Active	NYC Aging Funded Service	1	0	<input checked="" type="checkbox"/>

NOTE: The units will not be counted if the attended box(es) are unchecked.

Editing an Existing Unit Entry

The process of editing an existing unit is similar to creating a new unit. The key difference is on the Unit Entry List view. When editing, select the Unit Entry # Link. That will take you to the Unit Entry Details page. From there you can change the details, add or delete clients to the event. A Unit Entry can be changed only while its status is Draft.

Unit Entry #	Date of Occurrence	Service Type	Total Clients	Total Units	Total \$	Created by	Created Date	Source	Status
1 UE-7947901	02/14/2025	Physical Health/Ex...	1	1		David Dring	03/10/2025	Event	Draft
2 UE-5349891	02/01/2025	Physical Health/Ex...	2	0		David Dring	02/02/2025	Event	Voided
3 UE-5349890	01/29/2025	Physical Health/Ex...	2	2		David Dring	02/02/2025	Event	Final

This list view displays the Status of a Unit Entry. There are three different Status types:

- Draft: This unit is still editable.

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- Final: The month that unit was entered has been finalized in the **Monthly Unit Summary**. Therefore, it cannot be changed. If it is essential to unlock the **Monthly Unit Summary** to edit units, contact your Program Officer.
- Voided: This is like deleting a unit. It cannot be edited and will no longer be counted.

Enter Units By Scanning QR Codes

QR Code scanning allows real-time access to information on the clients participating in your activities. The process of scanning a client into a pre-selected event, confirming them and then associating the funding and unit value reduces discrepancies with unit reconciliation.

Step 1: From the **Top Menu**, click **Program Tools**, then the **Event Profile** tab.

Step 2: Click on the event you want to scan clients into.

Step 3: From the Event details page, click on Unit Entry.

Details

Event Signup

Unit Entry

Unit Entry (5)

New

	Unit Entry #	Date of Occurrence	Service Type	Total Clients	Total Units	Total \$	Created by	Created Date	Source	Status
1	UE-7947902	03/10/2025	Physical Health/Ex...	2	2	\$0.00	David Dring	03/10/2025	Event	Draft
2	UE-7947901	02/14/2025	Physical Health/Ex...	1	1		David Dring	03/10/2025	Event	Draft

Step 4: Click on a Unit Entry # link or select the **New** button.

Step 5: Select the Scan QR Code button to initiate scanning.

Unit Entry

Event Details

Event Profile
 Balance Class FY24

Event Location

Fee Amount
\$0.00

Event Type
Units by Client

Unit Type
Participant

Event Manager

Unit Entry Details

* Date of Occurrence
Mar 10, 2025

* Status
Draft

Total Units
2.00

Total \$
0.00

Filter & Auto Fill

Name

Funding Source
--None--

Units
0

Amount
0

Select all Attended?
☐

Scan QR Code

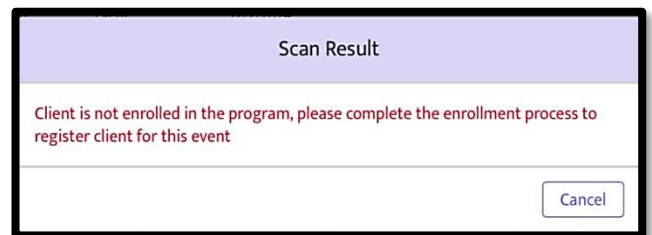
Step 6: A windowpane appears showing the image from the back facing camera. Maneuver the camera so that the member's ID card is clearly within the windowpane.



Step 5: If the client's QR Code is recognized, a confirmation pop-up will appear. From this pop-up you can Cancel, Rescan, view the client's details or Mark Attendance.

TIP: It is best to use a tablet, PC, or laptop to enroll a client to an event when utilizing the Scan QR Code feature due to the large amount of information that will display on the screen.

If the Client's QR Code is not recognized because the client is not enrolled in the program, a pop-up will appear telling the user to complete the enrollment process.



Step 7: If you select the **Mark Attendance** button, a pop-up will appear to finalize the unit entry.

Step 8: Either enter the Funding Source, Units and Amount here and select Save; or select Save and enter this information on the Unit Entry page.

Tip: If the client is not enrolled in your program, you have the option to create a new enrollment. Once client enrollment is created, you can sign the client up for an event.

Entering Anonymous Units for Events

There are two Service Types for which you can enter anonymous units: Information & Referral and Congregate Meals. As such, you will only see an Anonymous Units field on these screens. **Creating Anonymous clients is no longer allowed.**

TIP: You may want to name your Information Referral events like I&R Housing or I&R SCRIE to differentiate the types of I&R you provide.

Entering Anonymous Information & Referral Units

Step 1: From the Top Menu, click Program Tools. From Program Tools, click the Event Profile tab.

Step 2: Click on the event you created for Information Referral.

Step 3: From the event details, click on the Unit Entry link.

Step 4: Select the New button.

Step 5: Enter the number of Anonymous units provided that day.

The screenshot shows the 'Unit Entry' form. It is divided into two main sections: 'Event Details' and 'Unit Entry Details'.
Event Details:
- Event Profile: I&R - HEAP
- Event Location: 15 BAY RIDGE AVENUE, BROOKLYN, NY 11209
- Fee Amount: (empty field)
- Event Type: Units by Client
- Unit Type: Contact
- Event Manager: (empty field)
Unit Entry Details:
- *Date of Occurrence: Mar 16, 2025
- *Status: Draft
- Total Units: (empty field)
- Total \$: (empty field)
- Anonymous Units: (empty field, highlighted with a red box)

Entering Anonymous Meal Units

Step 1: From the Top Menu, click Program Tools. From Program Tools, click the Event Profile tab.

Unit Entry

Event Details

Event Profile
Congregate Meal Spring

Event Location
15 BAY RIDGE AVENUE, BROOKLYN, NY 11209

Fee Amount

Event Type
Congregate

Unit Type
Meal

Event Manager

Unit Entry Details

* Date of Occurrence
Mar 16, 2025

* Status
Draft

Total Units

Total \$

Meals Ordered

Meals Received

Anonymous Units

Step 2: Click on the event you created for meals, such as Congregate Meals.

Step 3: From the event details, click on the Unit Entry link.

Step 4: Select the New button.

Step 5: Enter the number of Anonymous units provided that day.

NOTE: There are no anonymous clients allowed.

Entering Meals Provided for Other Eligible Seniors, Ineligible Meals and Eligible Volunteers

Eligible Meals

Eligible Funding
--None--

Other Eligible Seniors ⓘ

Eligible Volunteers regardless of Age

Total Eligible ⓘ

Ineligible Meals

Ineligible Funding
--None--

Guests Under 60

Staff Under 60

Total Ineligible ⓘ

Keeping Track of Other Types of Meals Provided: When entering units for a congregare meal event, you are able to enter the number of meals provided to volunteers, other eligible seniors and guests and staff under 60 by filling in those fields.

Monthly Unit Summary

The Monthly Unit Summary summarizes units recorded by service type in a month. Once you have confirmed these amounts, you must finalize the report. **Once a report is finalized, units can no longer be entered or edited. If you need to unlock the Monthly Unit Summary, contact your program officer.**

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

Name	Month	Year	Created Date	Status
MUS-000070	February	2025	02/04/2025	Draft
MUS-000057	December	2024	01/10/2025	Final

Step 2: Click on either a Name link or the **New** button. **Step 3:** If you select the **New** button, you must select the month and year. Then click **Calculate Units** for that period.

If you select an existing Monthly Unit Summary, you'll be able to see the units entered for that period. If additional units are added, there is a Recalculate button, to confirm that all recent entries are included in that month's totals.

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](#)