Return to VIVÉ Knowledge Base

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.

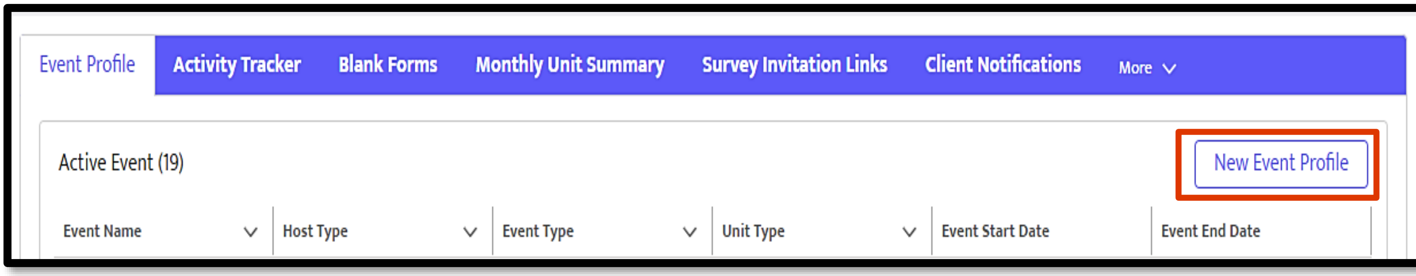
You may access this guide from the VIVÉ Knowledge Base or from a program specific reference guide. At the beginning and end of this document is a link to return to the VIVÉ Knowledge Base. You can also use your browser's back button to return to the program reference guide.

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.

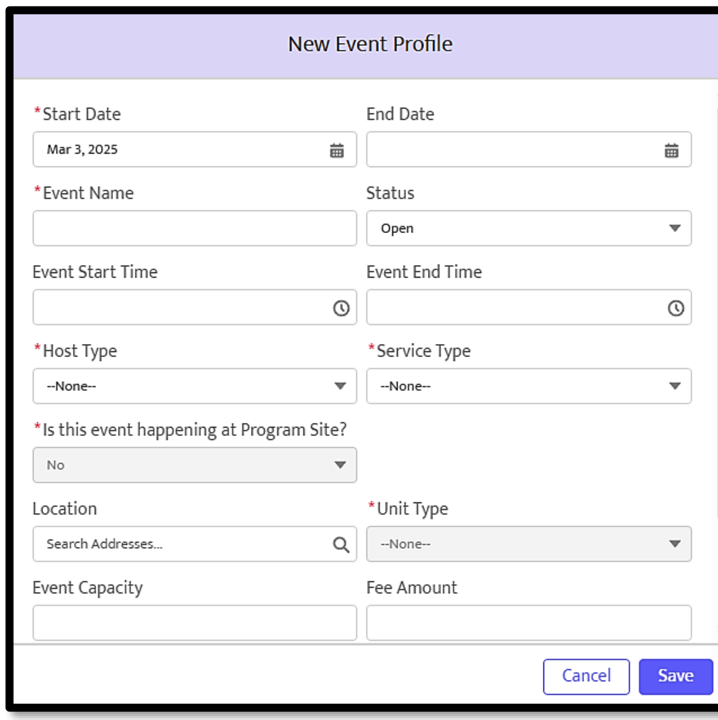
In this guide you will learn:

Creating Events

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

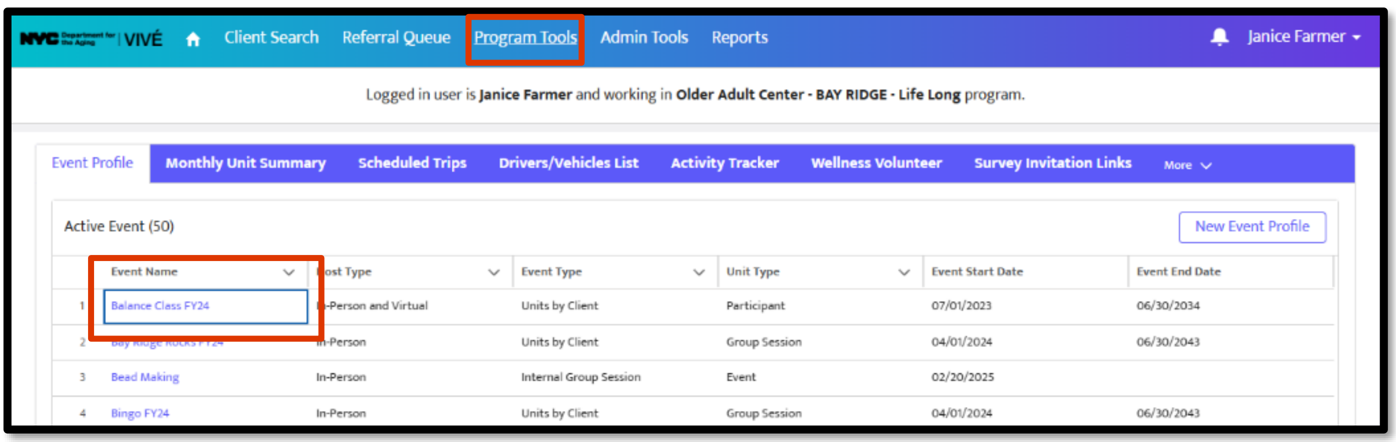
There are three ways to sign up a client enrolled in your program for an event.

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

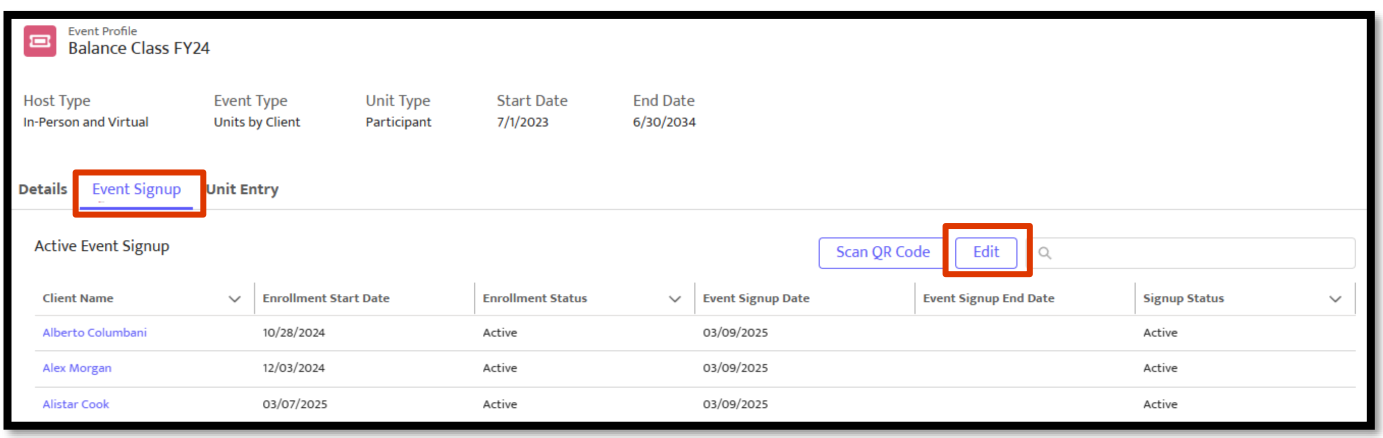
Signing up & Removing Clients via Event Profile

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.

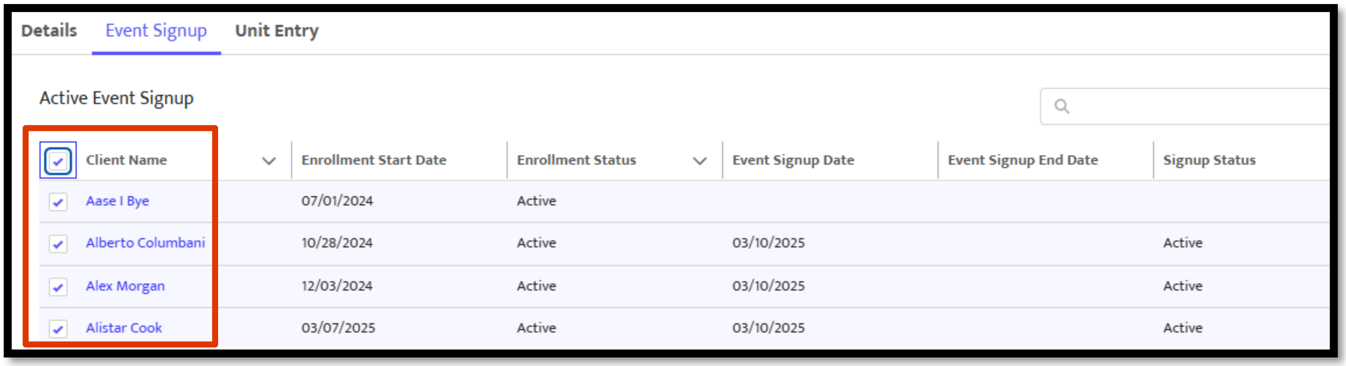


Step 3: Click **Event Signup**.



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

Client Name	Enrollment Start Date	Enrollment Status	Event Signup Date	Event Signup End Date	Signup Status
Aase I Bye	07/01/2024	Active			
Alberto Columbani	10/28/2024	Active	03/10/2025		Active
Alex Morgan	12/03/2024	Active	03/10/2025		Active
Alistar Cook	03/07/2025	Active	03/10/2025		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.*

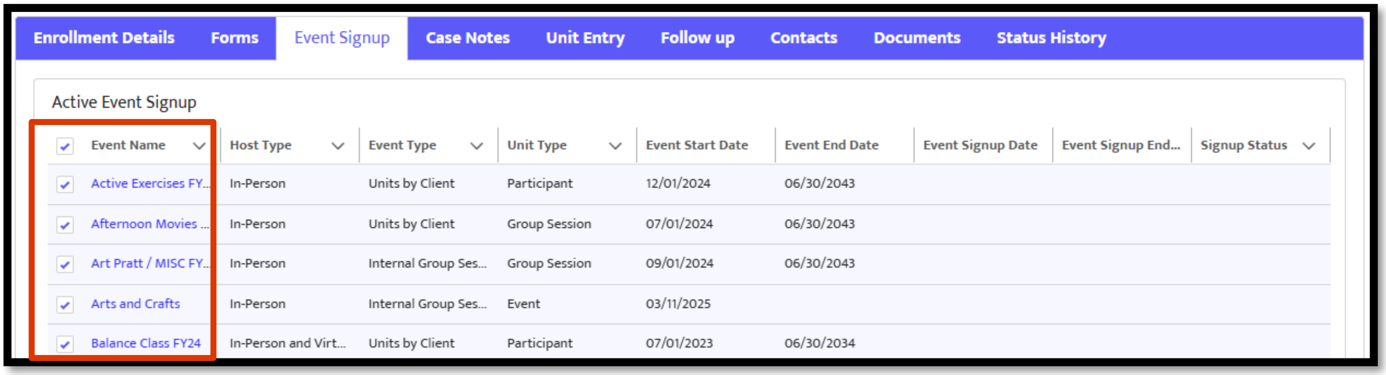
Sign up & Removing Clients via Enrollment Details Menu

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.



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

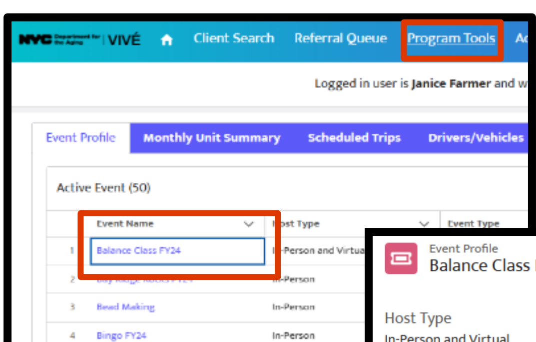
Scanning a client's QR Code using a mobile device with a camera, such as a tablet, streamlines the process. QR Code scanning is done via a browser; Chrome or MS Edge are best.

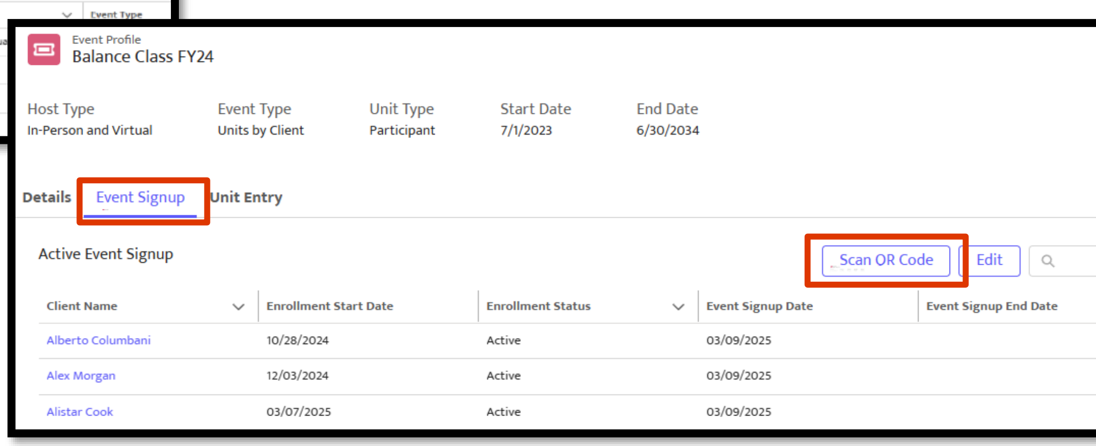
NOTE: *The client needs to be enrolled in your program before using the QR Code scanning.*

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.

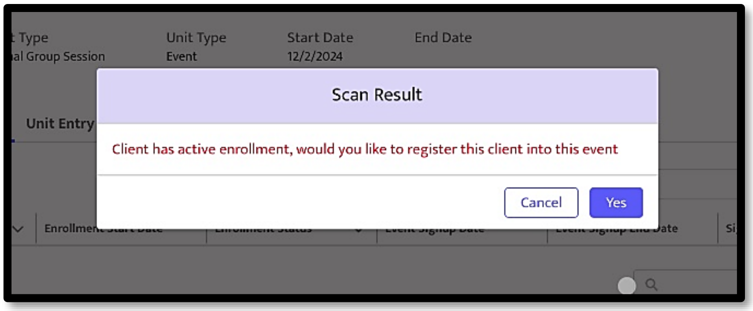
Step 3: Click **Event Signup** link. Then select **Scan QR Code button**. (More information on QR Code Scanning)





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**.



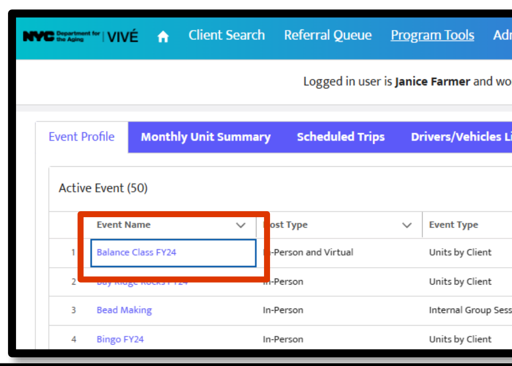
Event Unit Entry

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).

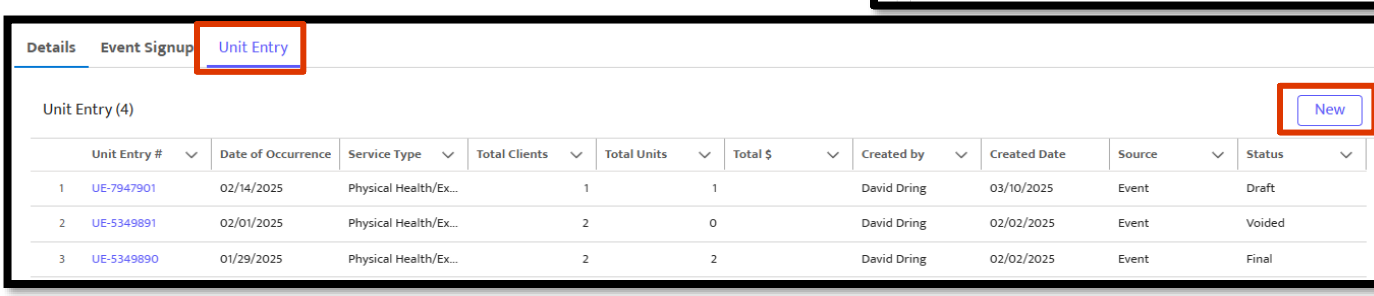
Entering Units from the Events Profile



First, create a unit entry.

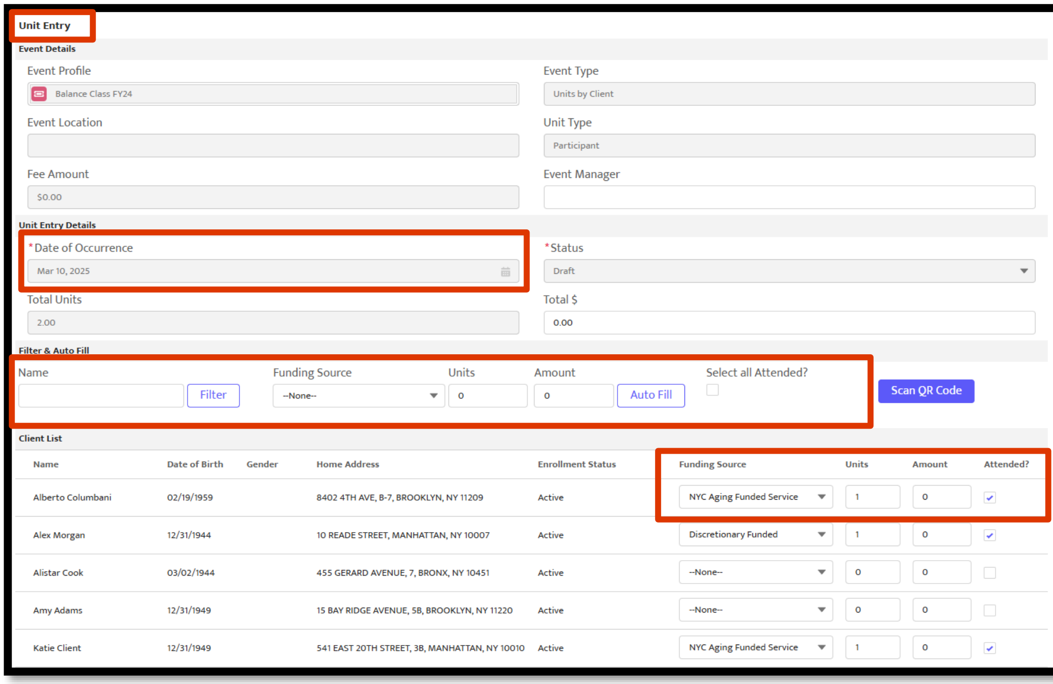
Step 1: From the **Top Menu**, click on **Program Tools.**

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



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.

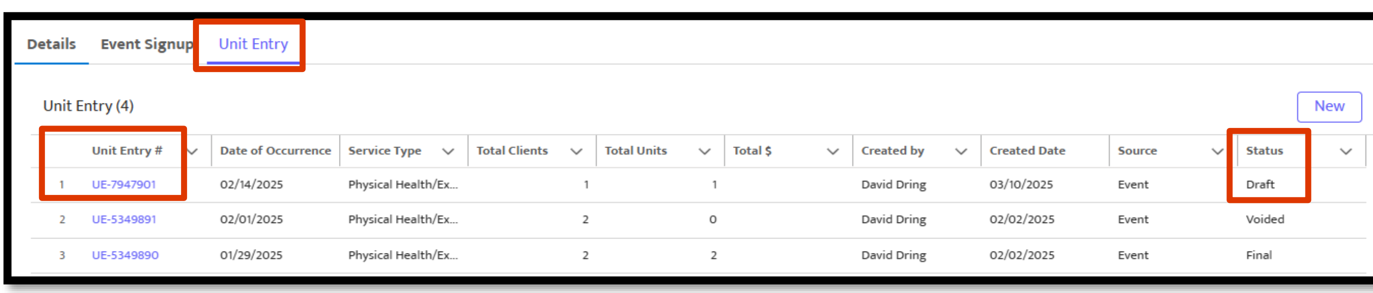
Step 6: Either enter the units using the Auto Fill or individually by client.

- 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.

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.



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

- Draft: This unit is still editable.

- 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.

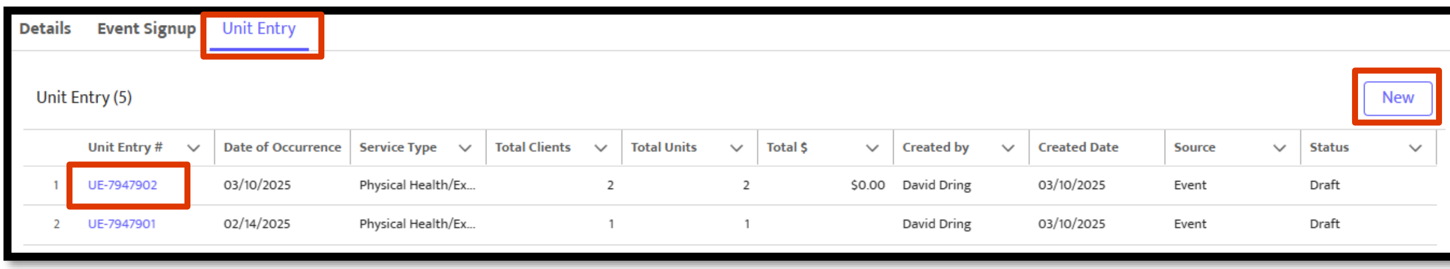
Enter Units By Scanning QR Codes

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.

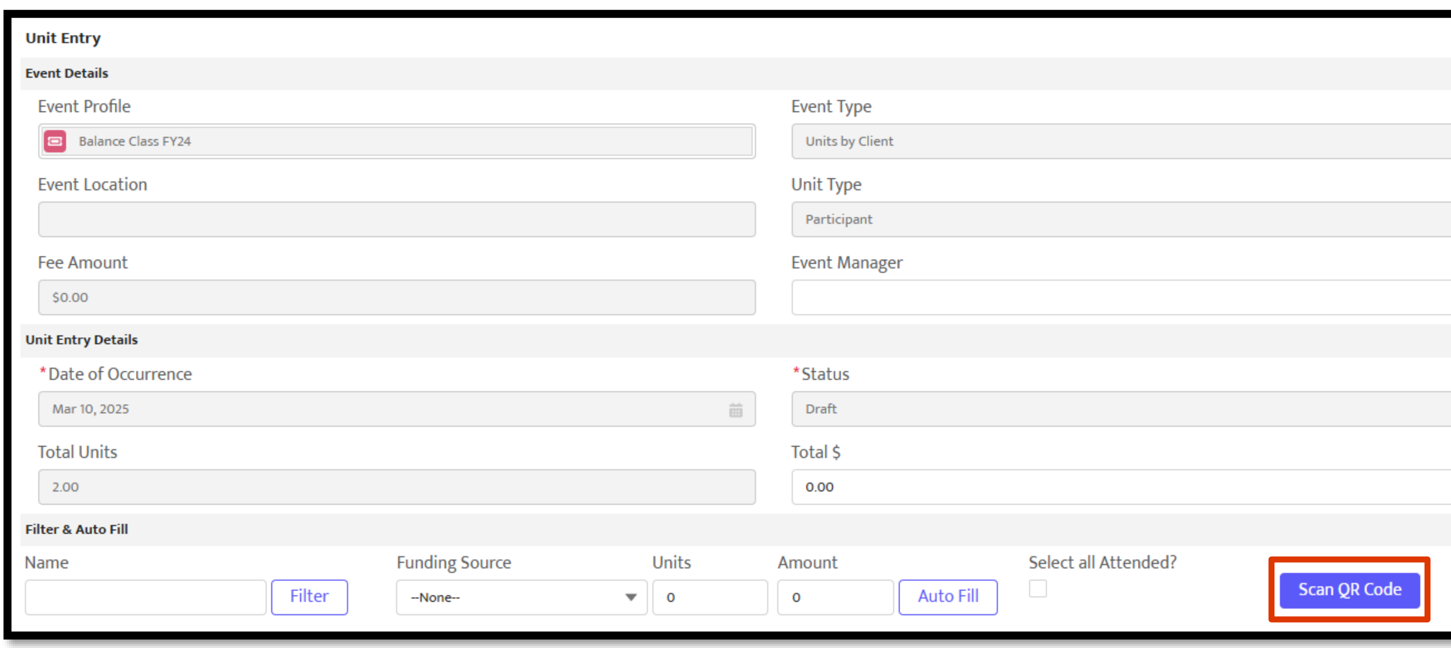
Step 2: Click on the event you want to scan clients into.

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



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

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

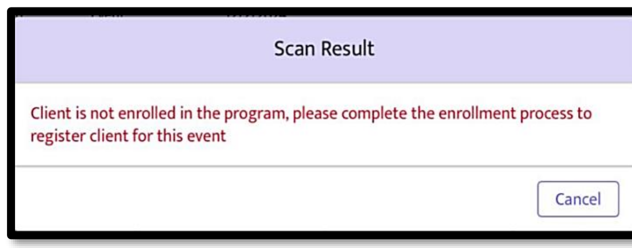


Step 6: A windowpane appears showing the image from the back facing camera. Maneuver the camera so that the member's ID card is clearly within the windowpane.

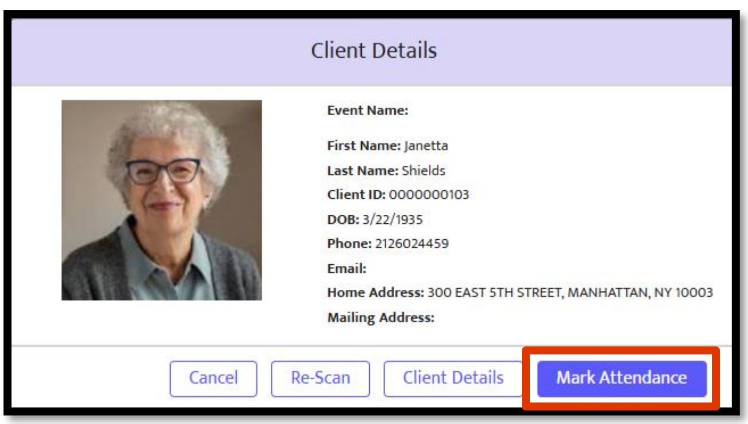
Step 5: If the client's QR Code is recognized, a confirmation pop-up will appear. From this pop-up you can Cancel, Rescan, view the client's details or Mark Attendance.

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.

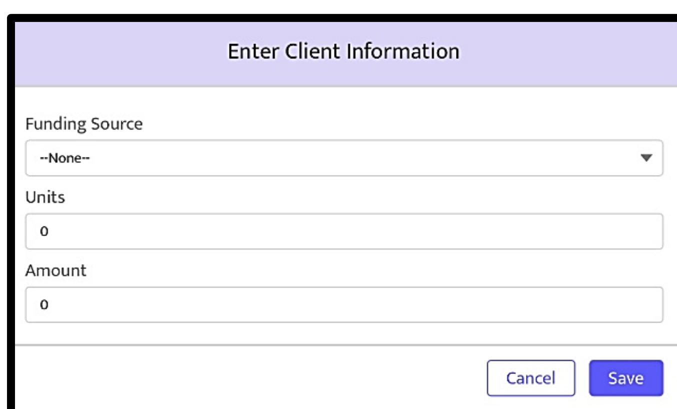


Step 7: If you select the **Mark Attendance** button, a pop-up will appear to finalize the unit entry.



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

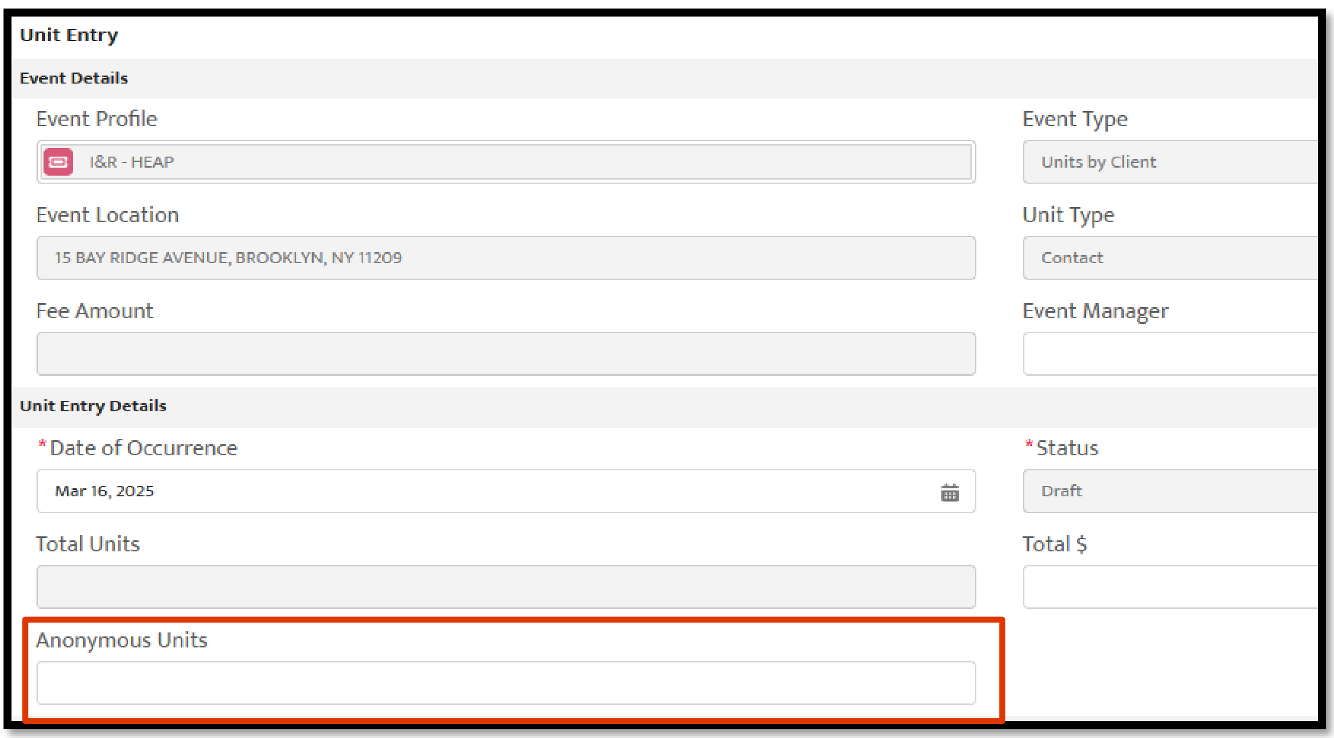
Step 1: From the Top Menu, click Program Tools. From Program Tools, click the Event Profile tab.

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

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

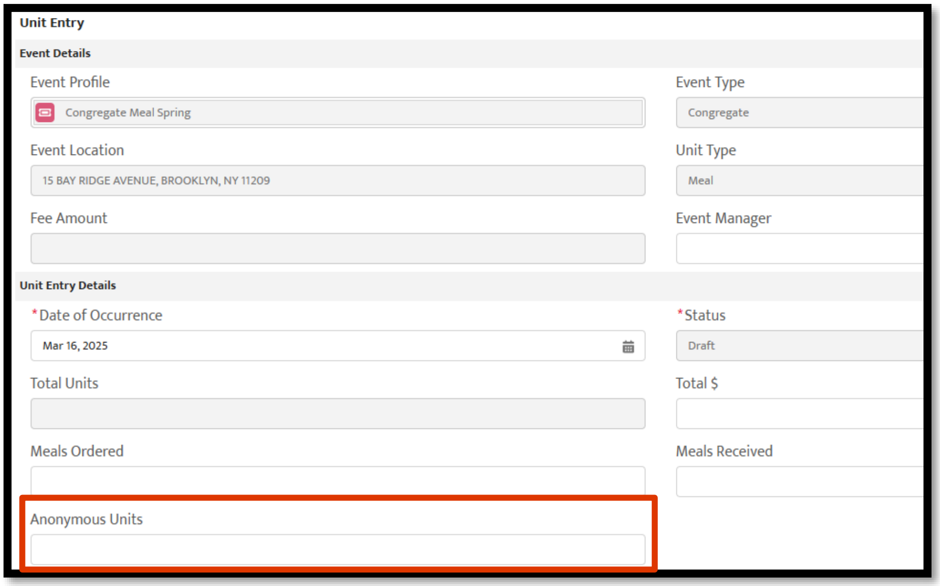
Step 4: Select the New button.

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



Entering Anonymous Meal 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 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.*

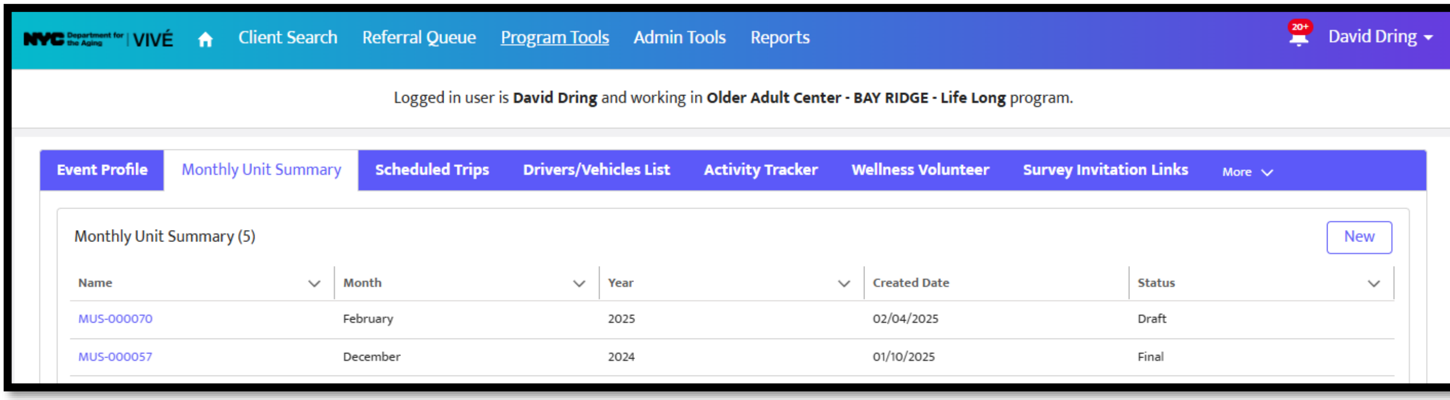
Entering Meals Provided for Other Eligible Seniors, Ineligible Meals and Eligible Volunteers

Keeping Track of Other Types of Meals Provided: When entering units for a congregate 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.

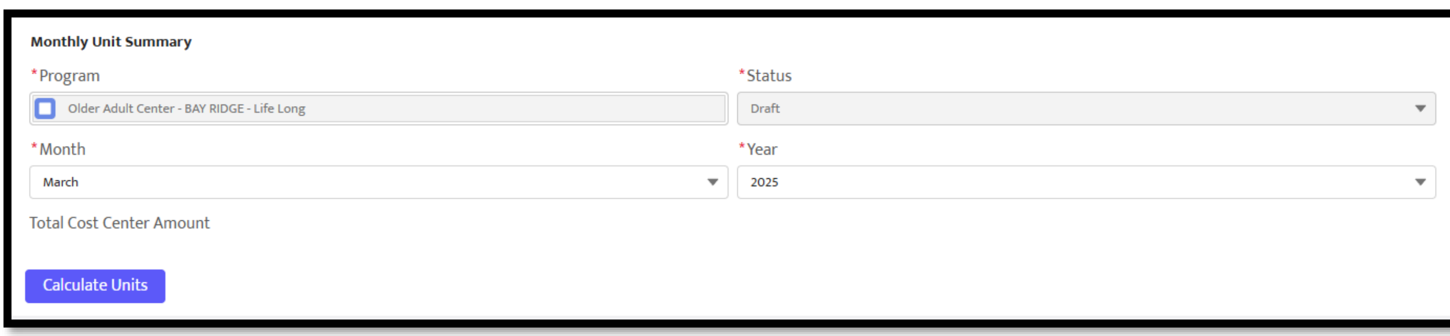
Monthly Unit Summary

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**.



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