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The VIVÉ QR Codes 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 and viewing **QR Codes**.

QR Codes is a common functionality within VIVÉ. 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. Users can also use their 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 program's standards.

In this guide you will learn:

- Overview of QR Codes
- Locating & Printing QR Codes
- Using QR Code to Search for Client

Overview of QR Codes

VIVÉ uses **QR Codes** which streamlines client search, event sign-up, and unit entry. These codes are quick and easy to scan using a tablet, smartphone, or PC. When a client is entered into VIVÉ, a unique QR Code is automatically generated. This code stays with the client across all NYC Aging programs whether they are enrolled in one or multiple programs.

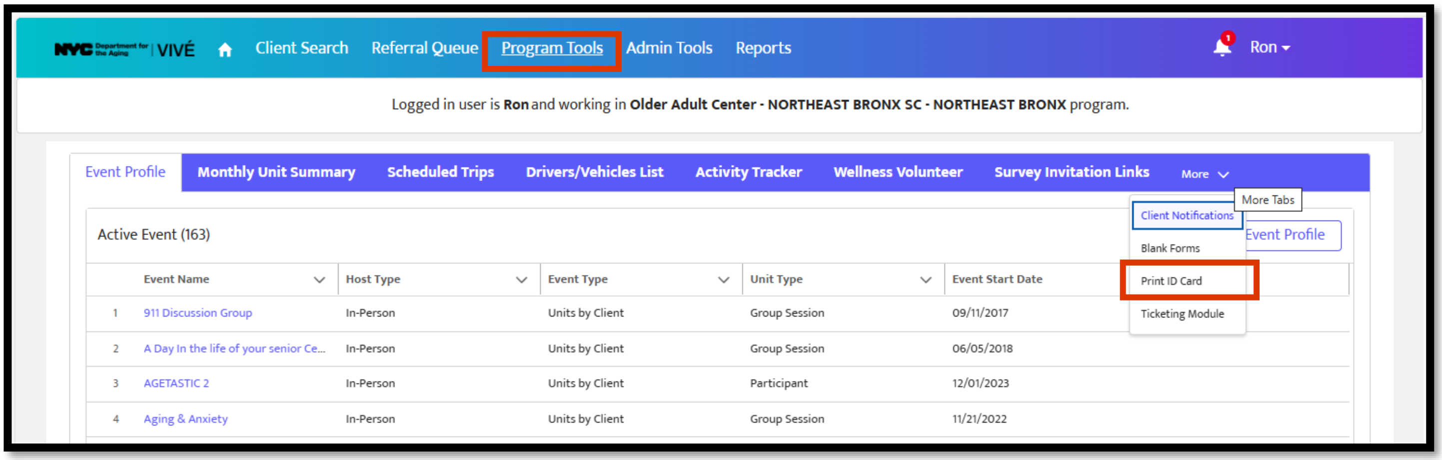
***NOTE**: It is better for you to use a tablet, PC or laptop when using the QR Code scanning feature because of the amount of information that is displayed on the screen.*

Locating & Printing QR Codes

Each client has a unique QR Code. It is accessible at the bottom of the Basic Demographics page and when Printing an ID Card. Once a client is enrolled in a program, an ID card with their QR Code can be printed.

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

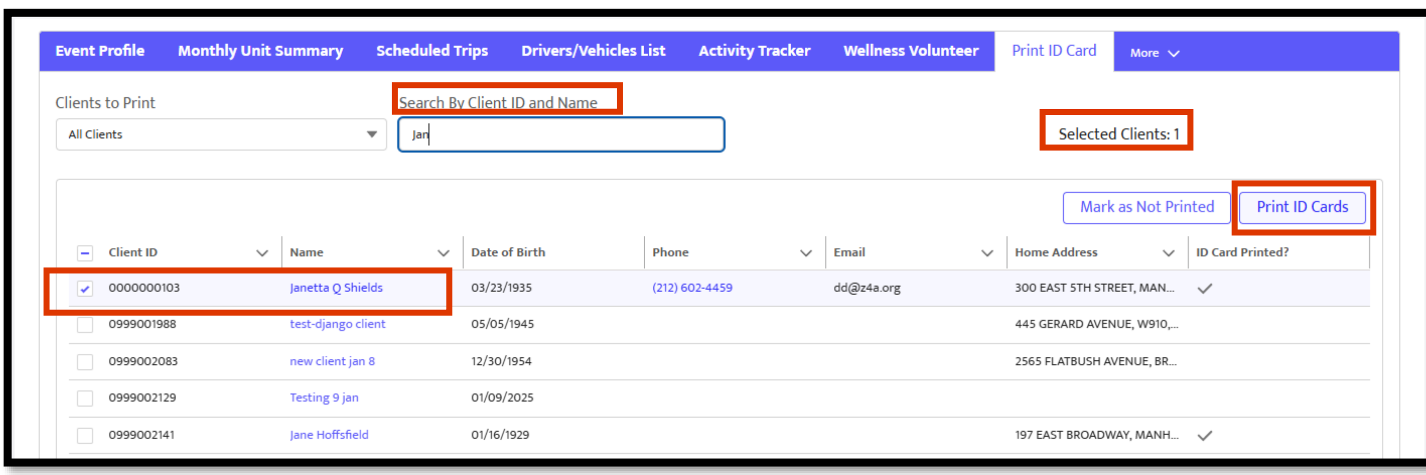
Step 2: Click the **Print ID Card** tab. Depending upon the width of your window, you may have to select **More** to access the **Print ID Card** tab.



Step 3: Either browse through the names of enrolled clients or use the **Search by Client ID or Name** to find those clients whom you want to print ID cards.

Step 4: Once a client has been identified, check the box to the left of their Client ID. You can select all clients or specific clients. .

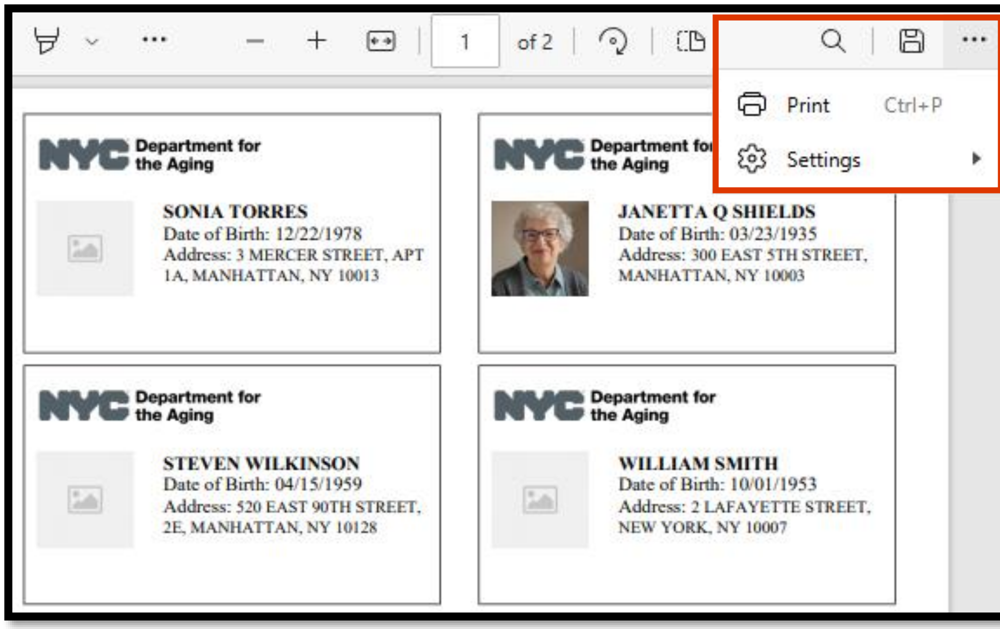
Step 5: You can see how many clients you have checked by the count from **Selected Clients**.



Step 6: Select the **Print ID Card** button to generate a PDF of all cards selected . Each card is one sided. The PDF is formatted to print ID Cards the size of business cards.

Step 7: After previewing the PDF, use the PDF viewer to print the cards. Select the three dots in the upper right corner to access the print function.

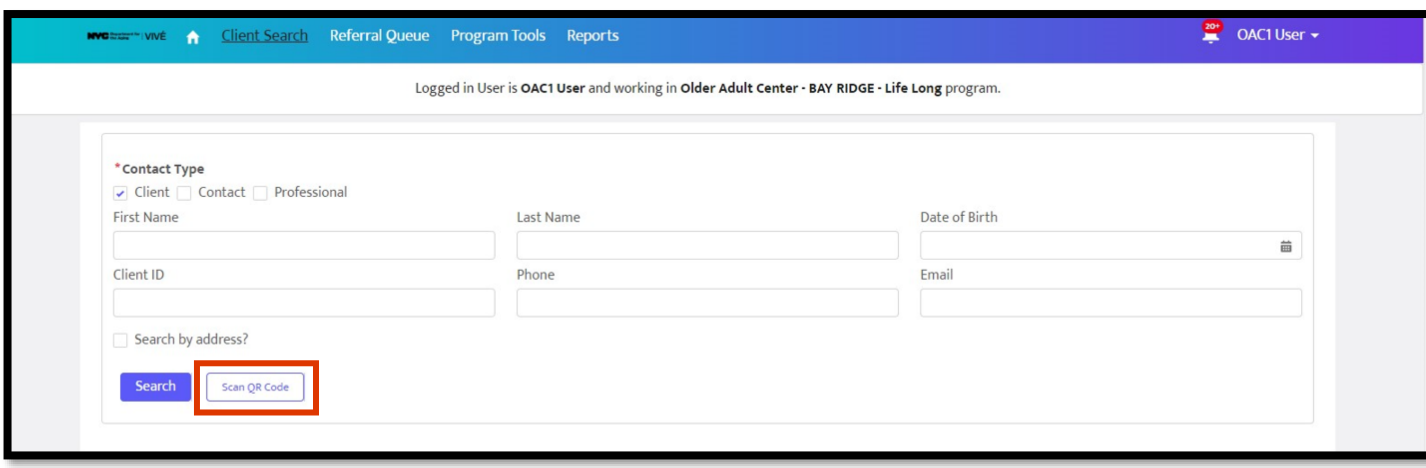
Step 8: Press print.



Using QR Code to Search for Client

When a client comes to your program ask them for their ID card which will have a **QR Code**. If they do not have a card, or do not have the card available, you can manually search for the client by typing in their name or address into **Client Search**. (for more information on [Client Search](#)**).**

If the client has an ID card, click the Scan **QR Code** button.

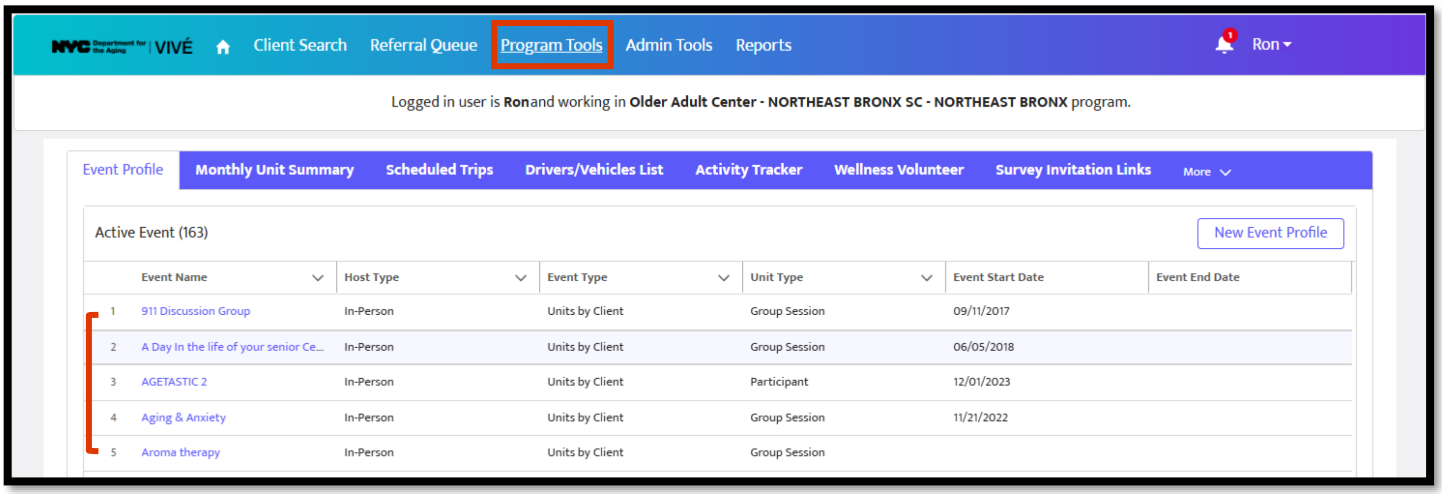


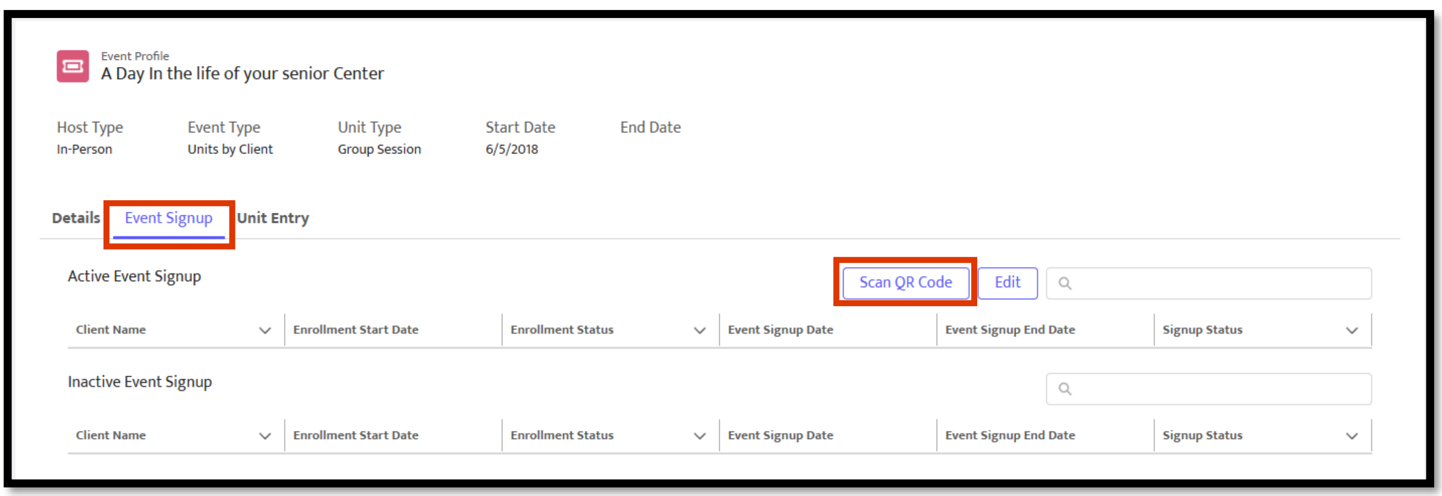
The system will prompt you with a request to use your camera, choose **Allow**.

> ***SYSTEM RULE:*** *The client must be enrolled in your program for you to use the QR Code Scanning feature to sign clients up for events.*

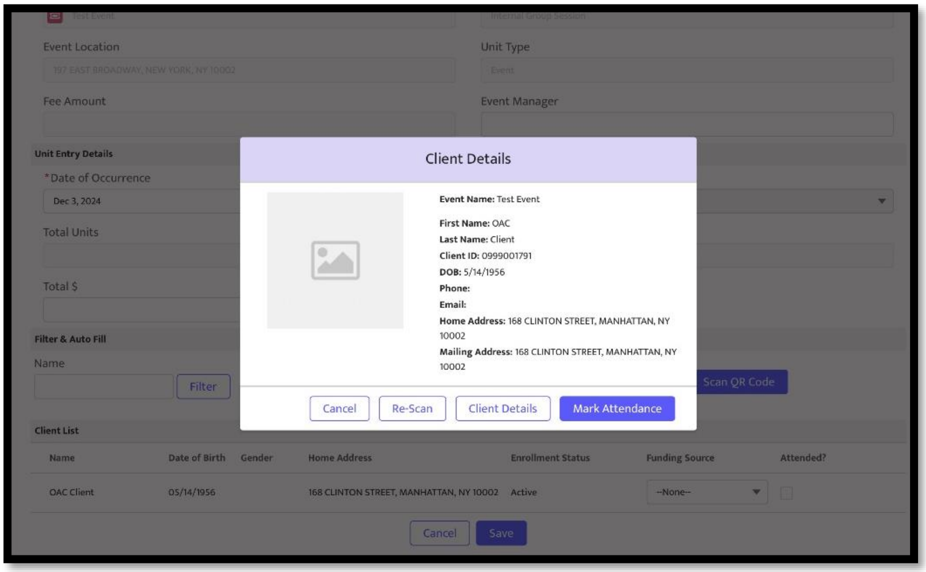
When Scanning the Client you can Sign Clients Up for Events:

- Click Program Tools.
- Under Event Profile use the hyperlink next to the Event name (in Program Tools, Event Profile).
- Click Event Signup.
- Click the Scan **QR Code** button.



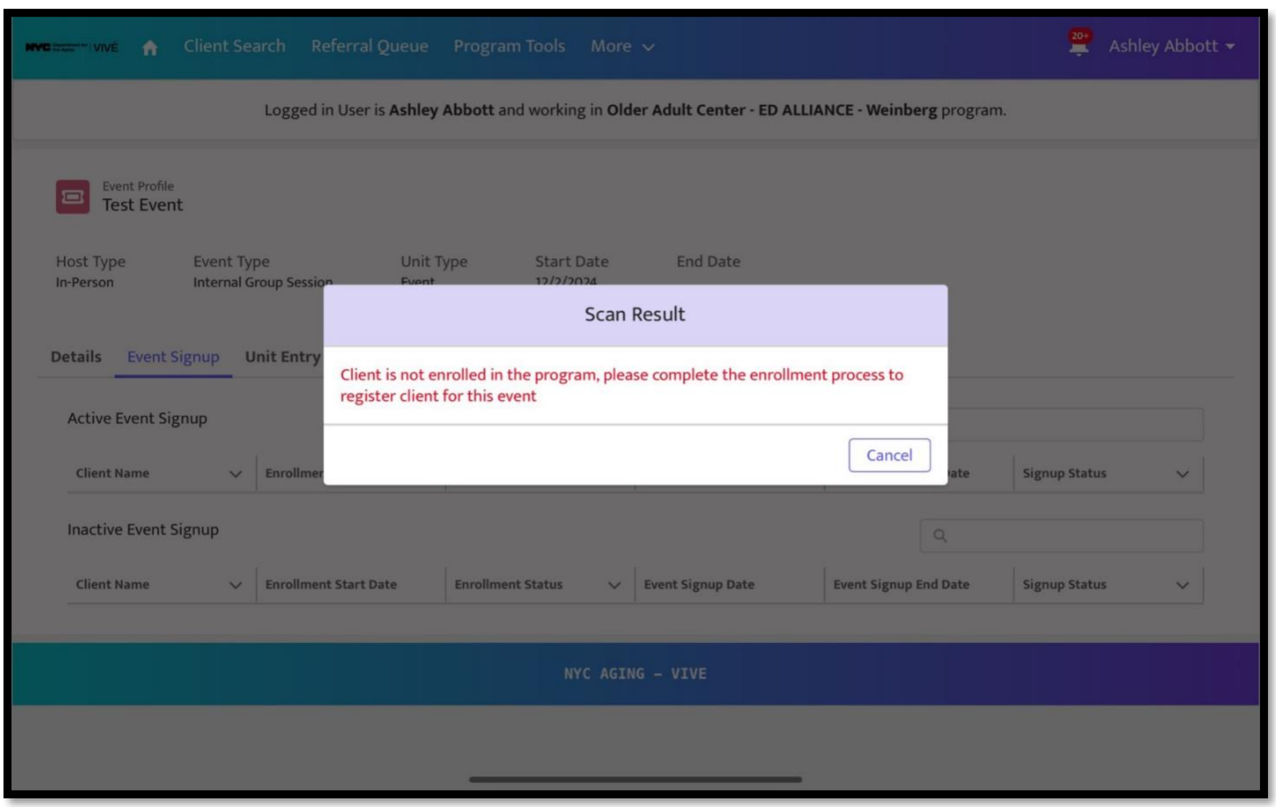


- You will get a pop-up message asking for your permission to use your device's camera.
- Click Allow.
- Scan the client's **QR code** (on the ID card) and click Attended (to enable you to enter a unit).

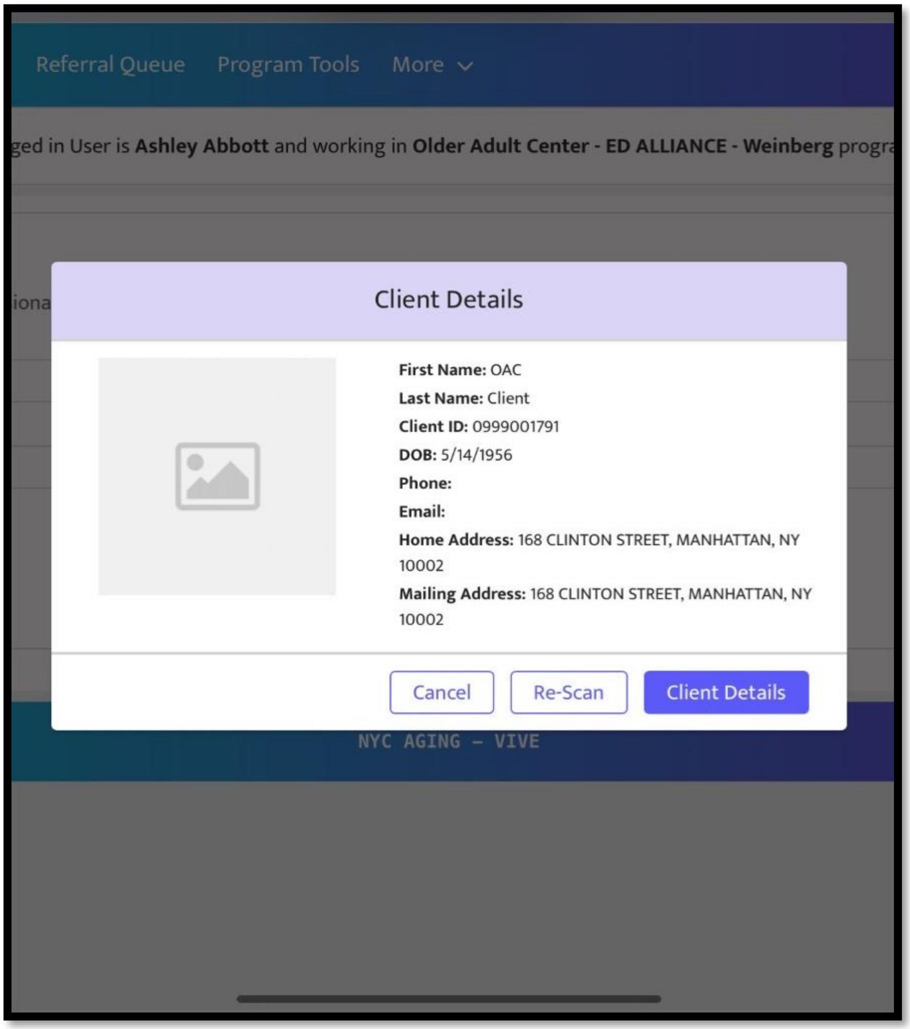


To Sign Clients Up for Events If the client is not enrolled in your program:

If a client is not enrolled in your program, you will get an error message (as seen below) when you try to sign the client up for an event.



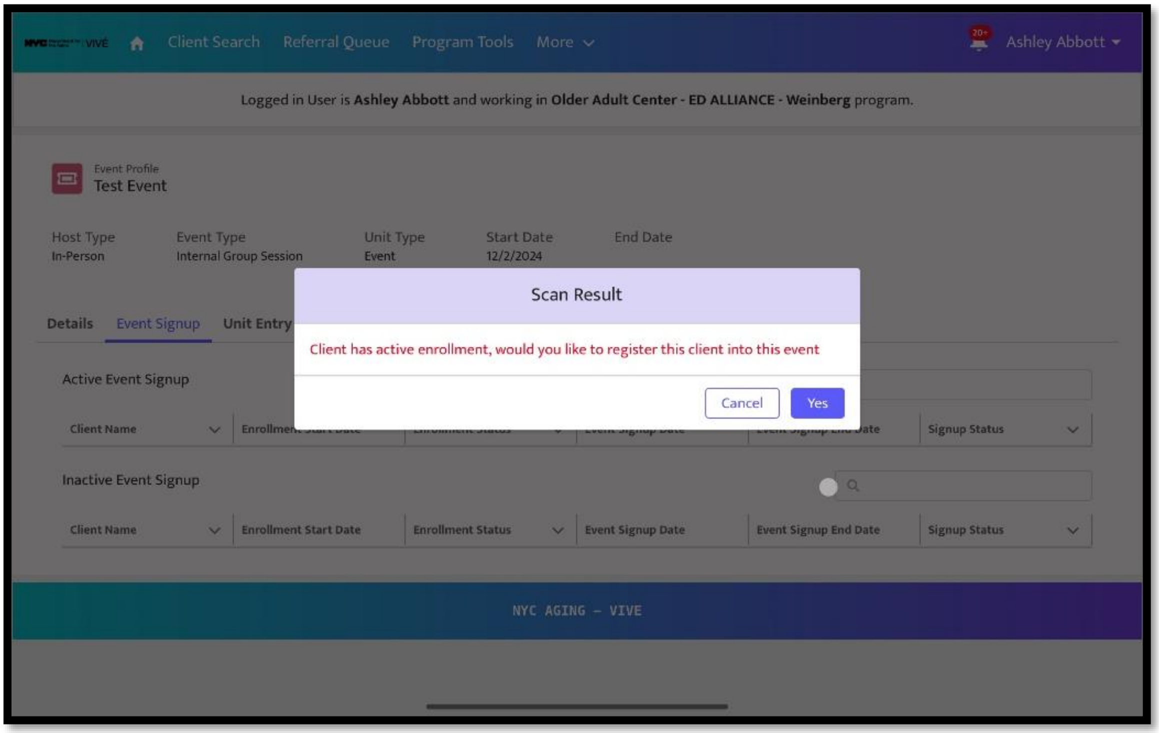
- To enroll the client, click the Cancel button.
- Go back to Client Search.
- Click Scan **QR Code** to find their record in VIVÉ.
- Click Client Details.
    - If the client is enrolled in an OAC you will see the full client profile where you can enroll the client in your program (by clicking the Enrollments tab and enrolling the client in your program as usual. (for more information on **Enrollments**)
    - If the client is enrolled in a program that is not an OAC you will need to acknowledge Consent to Collect Data before you will be able to enroll them in your program. (for more information on **Consent**)

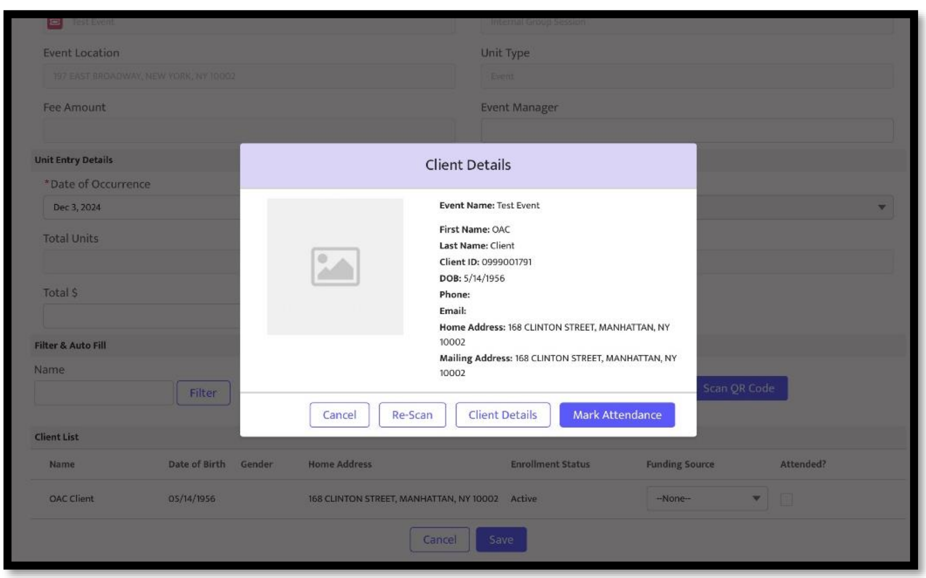


Once the client is enrolled in your program, you can sign them up for the Event in Event Profile using the same steps as before:

- Use the hyperlink for the Event (which will bring you to the Event Details screen).
- Go to the Event Signup tab.
- Click the Scan **QR Code** button.

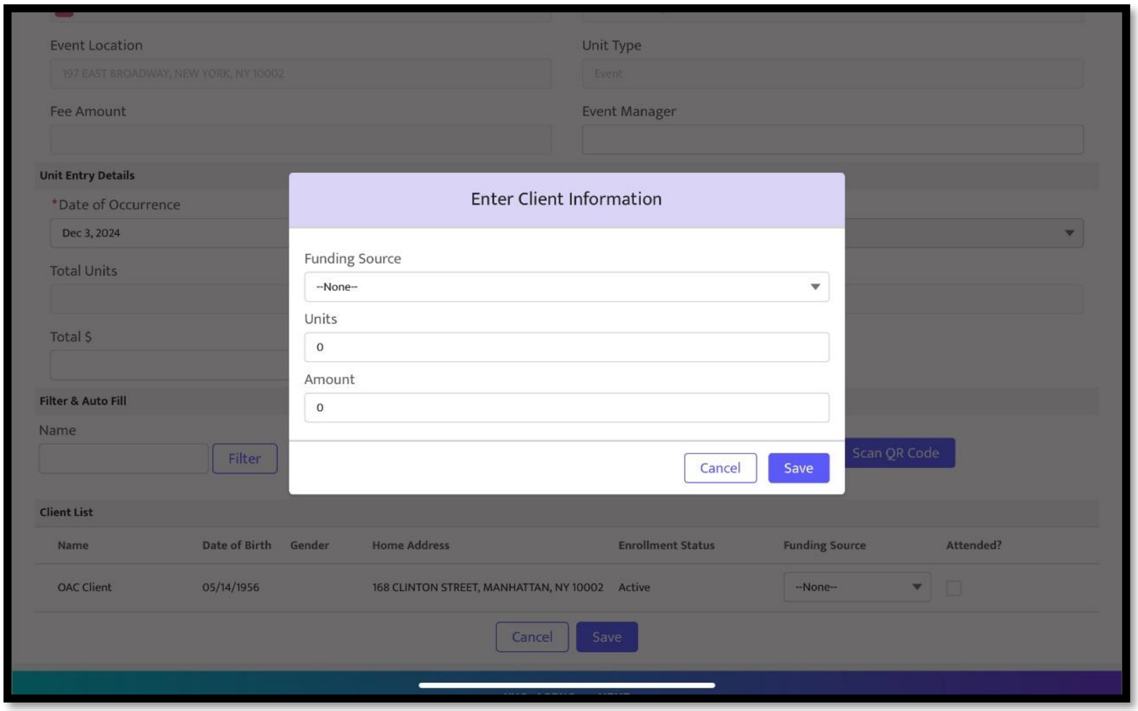
- You will get a pop-up message asking for your permission to use your device's camera.
- Click Allow.
- Re-scan the client's **QR code** (ID card), confirm request to register client for the event.
- Click the Mark Attendance button.





Marking Attendance and Entering Units

Once you have marked the person as "Attended" using the client's **QR Code**, a screen will come up, and you can enter the Unit(s), Funding Source and Amount (if applicable). Then click Save.



Note: Users can choose not to enter the Unit at this time. The Save button can be selected to leave the available fields blank. The user will then be brought back to the Unit Entry screen where they can use the Autofill feature, or choose to enter units when they are ready to enter other units for the Event at the end of the day or month.

Marking Attendance and Entering Units for Clients Already Enrolled in an Event

If clients are already signed up for an Event you can use their **QR Code** to track their attendance and enter units:

- Click the link underneath the Event.
- Click the Scan **QR Code** button and use the same procedure as above.

Access Assistance with VIVÉ and the VIVÉ Knowledge Base

- VIVÉ Knowledge Base contains reference guides, short videos and recorded trainings.
- Contact the VIVÉ Application Support Center via VIVÉSupport@aging.nyc.gov

Return to VIVÉ Knowledge Base