ServWare

Contact Information
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Conference User Guide

ServWare is designed to simplify the record keeping tasks of call takers, home visitors, and administrators who manage conference activities. This User Guide explains the basic tasks that a call taker, home visitor, or treasurer may perform while managing neighbor requests:

- Call taker tasks include searching and/or entering basic neighbor information and initiating assistance requests, and possibly entering assistance details.
- Home visitor tasks include verifying neighbor and assistance request information as well as completing assistance requests.
- Treasurer tasks included viewing pending assistance, completing assistance requests, and tracking conference financial information.

All you need to run ServWare is a computer or tablet that is connected to the Internet. Simply open a browser window, such as Microsoft® Internet Explorer®, Google Chrome™, or Mozilla® Firefox® and enter www.ServWare.org in your browser's address bar.

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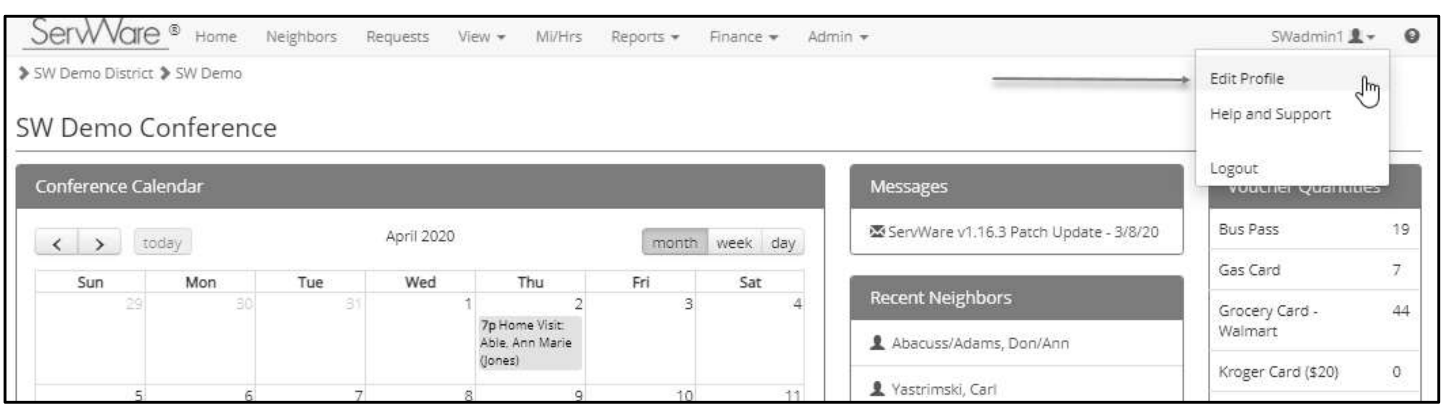
Managing Your User Profile

Your administrator will create your user account and will provide you with your username and password. After you have successfully logged into ServWare for the first time, you will be prompted to change your password from the default value. You can also access your user profile and add or change information as needed.

Edit Your Profile

1. Click the arrow to the right of your conference name in the top right, and then click **Edit Profile**.
2. Add or modify the information as needed. You can change your password, if needed. Keep in mind, if you change your password, that passwords must contain between 8 and 20 characters, must contain one numeric character, one lower-case letter, and one upper-case letter.
3. Click **Save**.



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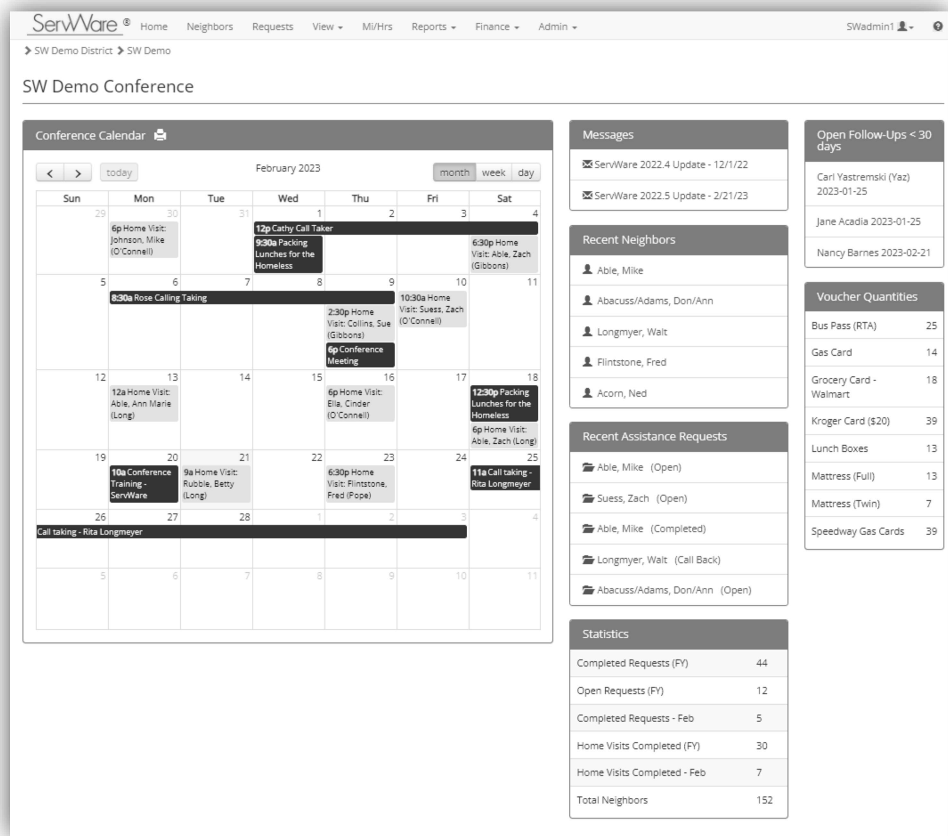
Home Page

The **Home** page contains the following information:

- **Calendar.** This area displays scheduled home visits, “other visits”, and calendar events created by your conference administrator. If you click on an event, the event details will display. If you click on a home visit, the associated request will display.
- **Conference Messages**. If your conference administrator creates conference messages, they will display on the home page for all conference members.
- **Recent Neighbors**. This area displays the last five neighbor records that you have viewed or edited.
- **Recent Assistance Requests.** This area displays the last five assistance request records that you have viewed or edited.
- **Conference Statistics.** This area displays miscellaneous information for the conference such as number of neighbors, completed assistance requests for the year, etc.
- **Open Follow-Ups.** If your conference has enabled the Follow-Up configuration option, any neighbor follow-ups that are either overdue or are due in the next 30 days will display on the **Home** page. Follow-up entries that display on the **Home** page can be clicked to view additional details.
- **DPV Remaining Quantities.** If your conference has been configured for direct payment voucher (DPV) tracking, this area displays the remaining amount of DPV assistance types, such as bus passes, clothing vouchers, and gas cards, etc. Your conference administrator will enter the quantities purchased and then as DPV items are provided for assistance, the quantities that display on the home page will be automatically adjusted.



Call Taker Activities

Conference call takers are responsible for verifying that neighbor information is correctly entered into ServWare. It is best practice to search for a neighbor before adding a new record to ensure that there are not duplicates in the application.

Add or Verify a Neighbor

- Click the **Neighbors** menu.

  You can sort records on the **Neighbors** page by clicking the arrows to the right of the column name. This includes the **Last Name**, **First Name, Home Phone**, **Mobile Phone**, **SSN (Last 4),** and **DOB** columns.

- Use the **Search** box at the top right to determine if the neighbor is already in ServWare. In the search box, you can use one or more of the following items to look for existing neighbors:
  - Search by last name.
  - Search by first name.
  - Search by street.
  - Search by house number.
  - Search by last four digits of SSN.

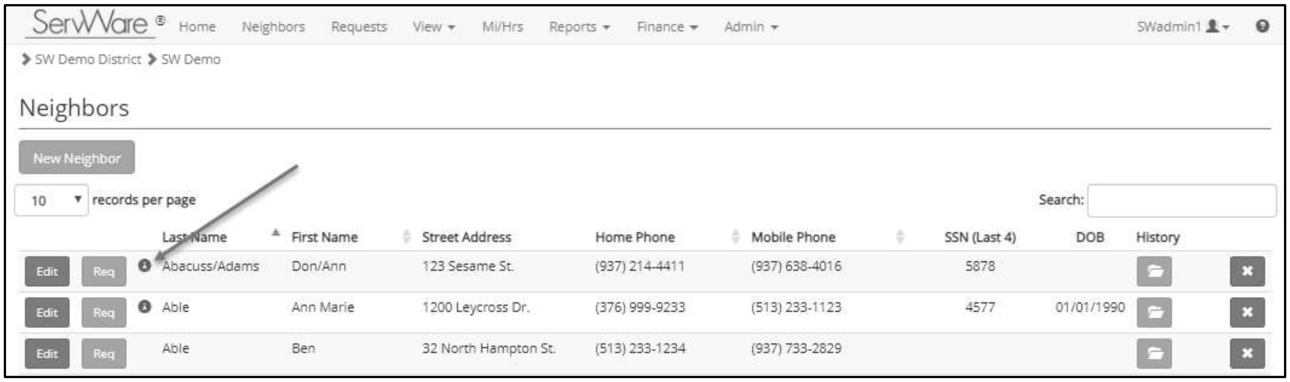
- To include the date of birth for the neighbor search, enter the date of **Birth Date** (mm/dd/yyyy, i.e. 11/15/2001) in the search box and click **Apply**.

  NOTE: The date of birth search is *in addition* to the existing Search box on the Neighbors page. For example, a date of birth value could be entered in the **Birth Date** search field and the **Apply** button is clicked. The Neighbor list would be filtered to those Neighbors with that birth date. Additional search values could be entered in the **Search** field to further narrow the list of results by name, address, phone, etc.

- If the neighbor does not already exist in the system, do the following to add a new neighbor:
  a. On the **Neighbors** tab, click **New Neighbor**.
  b. On the **General** tab, add at least the required information for a neighbor (**First Name, Last Name**, and **Address Line 1**). If you do not know the neighbor's address, you can use TBD or some other note to indicate that you do not yet know the neighbor's address. All other fields on the **General** tab are optional. If the **Case Numbers** configuration option is turned on for your conference, you can add a case number to the neighbor record or the case number is auto-generated (depending upon the way your conference is configured). Case numbers that are entered on the neighbor record are automatically copied to assistance requests that are created for that neighbor. Even if the case number is generated, it can be overridden. Case numbers must be unique within a conference.

     NOTE: If you are a conference that allows District neighbor searching, but you do not want this individual to show in district neighbor searches, you can select the **Private Neighbor** checkbox on the **General** tab of the neighbor/friend in need record to exclude the individual from District neighbor searches.

     Notes about the neighbor can be captured in the **Notes** field. An **Alert Note** can also be captured on the **General** tab, if needed. Alert notes are used to notify other conference members of important information about that neighbor. Alert notes display on the neighbor grid next to the neighbor's name indicated by a red "i" icon. When conference users hover over the alert note, the text that you have added displays.



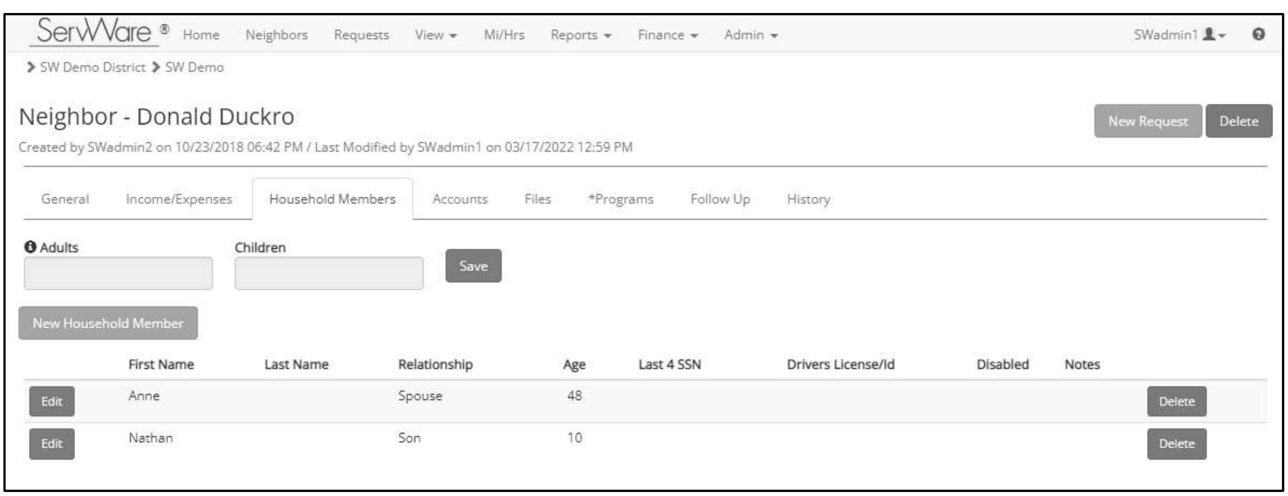
c. When you are done adding the general neighbor information, click **Save**.
NOTE: If another neighbor with the same first/last name, home or mobile number already exists in ServWare, a message displays to notify you of the possible duplicate record.

d. After saving information on the **General** tab, more tabs become available for capturing additional information about the neighbor:

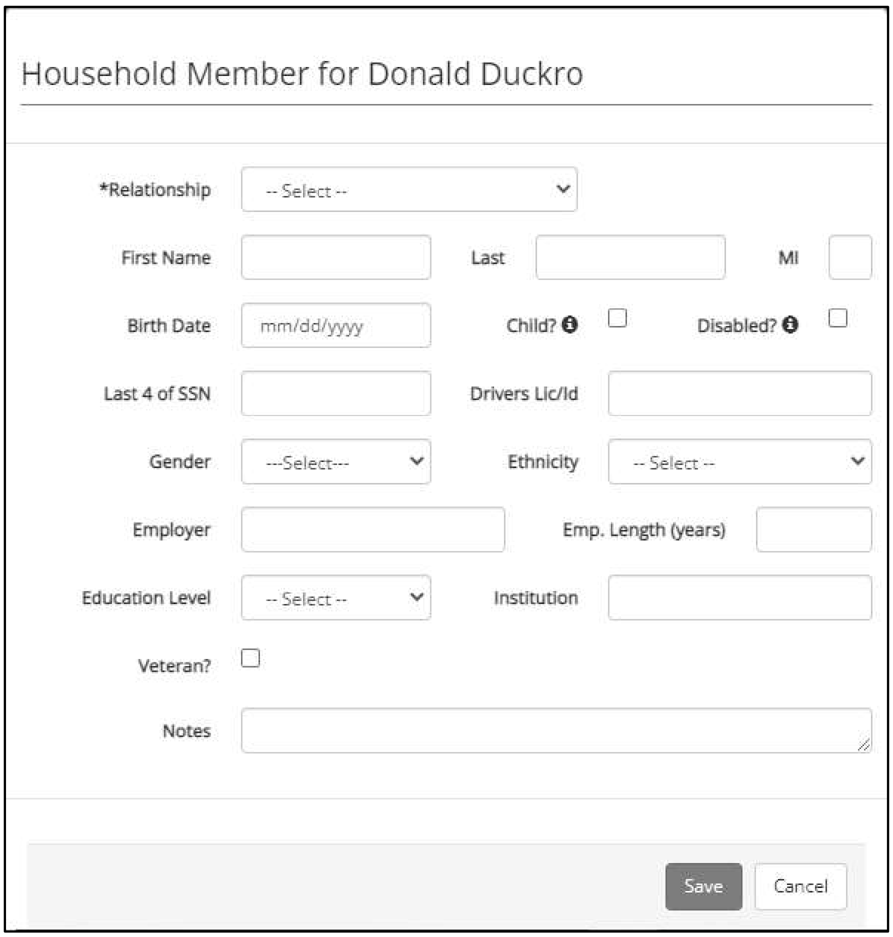
- **Income.** You can add income information, such as wages, child support or other income types as applicable to the neighbor. The administrator for your conference configures the income types that are available for selection on this tab. Total income is calculated and displays at the bottom of the page along with total expenses.

  If your conference has enabled the conference configuration option for capturing income levels, you select the neighbor's income level from the options that your administrator has added. Once selected, the income level and description will be copied to the neighbor/friend in need record. The assigned income level will be included on the assistance request report in the income area.

- **Expenses.** You can add expense information, such as rent, utilities, car payment or other expense types as applicable to the neighbor. The administrator for your conference configures the expense types that are available for selection on this tab. Total of expenses is calculated and displays at the bottom of the page along with total income.
- **Household Members**. There are two ways to capture family members for a neighbor. You can only use one method per neighbor record. Once you choose an option for capturing family member information, the other option becomes disabled.



- **Enter the number of adults and children.** If you choose this method for adding family members, simply enter the number of adults and the number of children in the household in the appropriate boxes. Click the refresh icon (t) to save t nformation.
- **Enter household members individually.** If you choose this method for adding household members, click **New Household Member** and then add the appropriate information. Only relationship is required. If you select the child option, this family member will be counted as a child for reporting purposes unless at a later time the child option is cleared. If possible, it is better to add a birth date (as close as possible) to allow ServWare to calculate the family member's age. This way, the family member will always be counted appropriately on reports over time (for example, when a 17-year-old turns 18 in a year from now and is then counted as an adult). Click **Save** to finalize the family member entry.



- **Accounts.** You can add accounts for the neighbor, such as their utility accounts, or rent account, etc.
- **Files.** You can upload files that are pertinent to the neighbor record.
- **Programs.** If the **Special Programs** option is enabled for your conference, you can assign the neighbor to the special programs that are defined by your administrator.

  If the special program you select has an associated assistance type, you can track assistance related to the special program as you would any other assistance (by creating an **Assistance Request** and adding the appropriate assistance on the request).

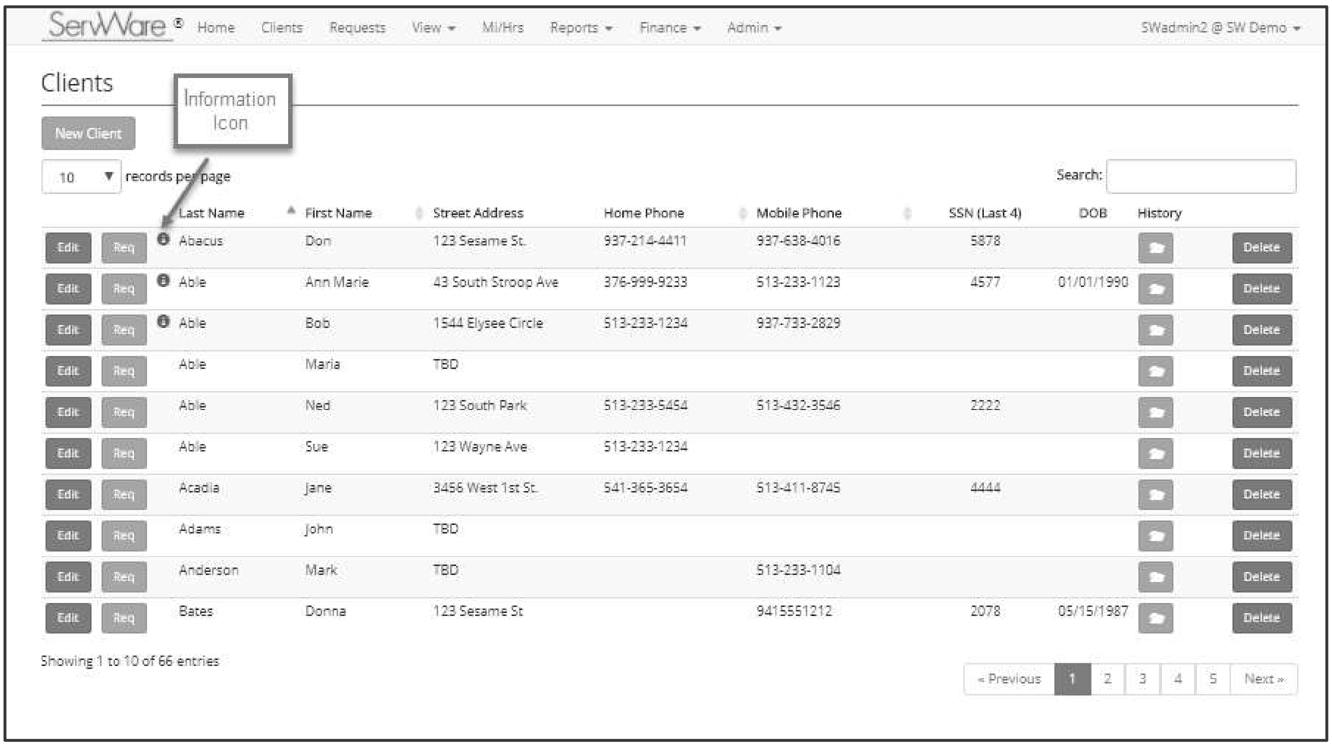
If the special program you select does not have an associated assistance type, you can track the assistance provided directly in the special program assignment for that neighbor. Values entered in this manner do not show on the **Activity Summary Report** or **Conference Activity Report**. The values are only visible on the **Neighbors Assigned to Special Programs** report.

- **Follow Up.** If the **Neighbor Follow-Up Support** configuration option has been enabled for your conference, you can add follow up details for a neighbor using the **Follow-Up** tab of the neighbor record. Upcoming or overdue follow-ups display on the **Home** page. You can access all follow-ups from the **View** > **Neighbor Follow Up** page.
- **History.** On the **History** tab, you can view past assistance for the neighbor. This includes the request date, status, and indication if the neighbor was referred to another conference or agency, request notes, and pending or actual assistance provided. Your conference administrator can define the request history time frame that is viewable from this tab. The default option for the history totals include current year, previous year, and all request history. The time frame can be changed by your conference administrator in the **Configuration Options** tab of the **Conference Details** page.

Edit a Neighbor

If the neighbor already exists in the application, and is displayed in the search results, do the following:

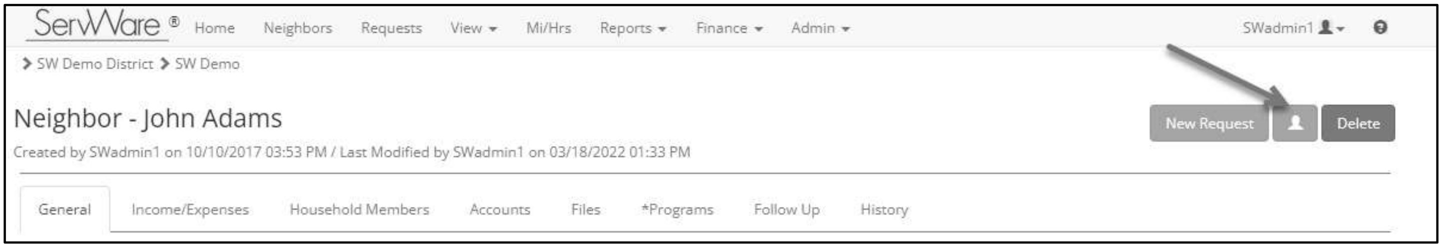
a. If an informational icon is displayed by the neighbor's name, you can hover your mouse pointer over the icon to view an alert note for that neighbor.
b. Click **Edit** for the neighbor.
c. Enter or verify the address, phone number, SSN, expenses, income, family members, and account numbers. You can also add an alert note for others to see from the neighbor search results list.
d. View the neighbor's history for an existing or open request. To do this, click the **History** tab from the **Edit Neighbor** page, or click the **History** icon for the neighbor from the **Neighbors** page. If there is not an existing or open request for this neighbor that applies to the current call, review the instructions later in this guide for creating a new assistance request.



		Last Name	First Name	Street Address	Home Phone	Mobile Phone	SSN (Last 4)	DOB	History	
Edit	Req	Abacus	Don	123 Sesame St.	937-214-4411	937-638-4016	5878			Delete
Edit	Req	Able	Ann Marie	43 South Stroop Ave	376-999-9233	513-233-1123	4577	01/01/1990		Delete
Edit	Req	Able	Bob	1544 Elysee Circle	513-233-1234	937-733-2829				Delete
Edit	Req	Able	Maria	TBD						Delete
Edit	Req	Able	Ned	123 South Park	513-233-5454	513-432-3546	2222			Delete
Edit	Req	Able	Sue	123 Wayne Ave	513-233-1234					Delete
Edit	Req	Acadia	Jane	3456 West 1st St.	541-365-3654	513-411-8745	4444			Delete
Edit	Req	Adams	John	TBD						Delete
Edit	Req	Anderson	Mark	TBD		513-233-1104				Delete
Edit	Req	Bates	Donna	123 Sesame St		9415551212	2078	05/15/1987		Delete

Email a Neighbor

To send an email to a neighbor, ensure that the neighbor record contains a contact email address. Click the email neighbor button ( ) in the upper right of the Neighbor page. Type a **Subject** and **Message**, and then click **Send**. The email will be from ServWare with the email address of the person initiating the email copied.



NOTES:

- Subject is required.
- When the Neighbor receives the email, the subject will be the subject entered followed by the name of the Conference.
- The **From** email address will be **no-reply@servware.org** but the email of the Conference member initiating the email will be in the **CC** address. The email will include a message that to reply they should select **Reply All**. If you would prefer to use a generic email address for your conference as the **CC** address, this can be defined in the **Neighbor Email CC Address** box on the **Admin** > **Conference Details** > **Configuration Options** tab.

View Household Income Levels

To view the household income levels that have been added by your administrator, click the **View** menu and select **Household Income Levels**. The defined income levels are available for selection on the neighbor record on the **Income** tab.

View Neighbor Follow Up Entries

If your conference has enabled the **Neighbor Follow-Up Support** configuration option, you can view all neighbor follow up entries and filter them by status, if needed.

View Landlords/Housing

While you are working with a neighbor, it may be helpful to view the landlords/housing details (such as contact phone numbers, addresses, and the landlord website) that have been added by your conference administrator. To view housing details, click the **View** menu and select **Landlords/Housing**.

View Utility Details

While you are working with a neighbor, it may be helpful to view the utility details (such as contact phone numbers, addresses, and the utility website) that have been added by your conference administrator. To view utility details, click the **View** menu and select **Utility Details**.

View Referral Agencies

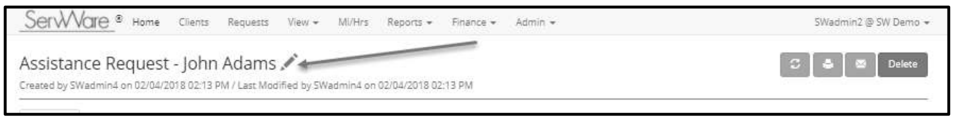
To view general and contact information for all of the referral agencies that are set up for your conference, click the **View** menu and select **Referral Agencies**. You can filter the list of agencies by category if referral categories have been defined by your conference administrator.

Add a New Assistance Request

- From the **Neighbors** page, click **Request** for the appropriate neighbor or from the **Edit Neighbor** page, click **New Request**. Current address, contact, and family member information from the neighbor record is be copied to the new assistance request. This provides a snapshot in time of the neighbor's address and family situation at the time that this request was initiated.

  If the neighbor information changes after the request is created, you can do the following to update the neighbor's information:

  a) Click the pencil icon to the right of the neighbor's name to make changes to the neighbor information.

  b) Make changes as needed to the neighbor information, and click **Save** to save your changes.
  c) After saving your changes, click the **History** tab for the neighbor record.
  d) From the **History** tab, select the **View** option for the assistance request that you were adding to return to the appropriate assistance request page.
  e) Click the refresh icon (at the top right of the **Assistance Request** page to update the neighbor information for this request.

- Complete the request information. Four tabs are available for capturing information as described below.

  General. Information on this tab must be entered and saved before you can continue to the other tabs of the request. Some fields are described below:

  - **Intake Person.** If this option is turned on for your conference, you can click and select the intake person for this request from the list of active conference members. The **Intake Person** on the assistance request will default to the conference member associated with the logged in user, but can be changed if needed.
  - **Status.** The status should be set to **Open** or **Open – Needs reviewed** until this request has been fulfilled (**Completed** or **Completed – Needs reviewed**), **Canceled**, or **Denied**.

    See below for a detailed description of the request statuses and how they impact ServWare reports.

    Status Options

    - **Open**. Default status assigned to a new Assistance Request. This indicates that the request is in progress and has not been completed.

      Note: Assistance Requests in Open status are not included in the Activity Summary or Conference Activity Reports.

    - **Completed**. An Assistance Request should be set to this value when the request is ready to be completed. This would be after all assistance to be provided has been given to the Neighbor, if it was decided that no assistance would be given to the Neighbor, or if the Neighbor was referred to another agency or conference.

      Note: The Activity Summary report only processes requests with a status of Completed or Denied.

  - **Open – Needs Review.** This status could be used to indicate that an Assistance Request that was in Open status needed to be reviewed by specific members of the conference.
  - **Completed – Needs Review**. This status could be used to indicate that an Assistance Request that was in Completed status needed to be reviewed by specific members of the conference.
  - **Call Back.** This status should be assigned to indicate that a Neighbor needs to be called back for more information regarding their request.

    Once the Neighbor has been contacted for more information the status should be updated to an appropriate value (i.e. Open, Completed, Denied).

  - **Denied**. This status indicates that it was decided that no assistance would be provided to the Neighbor for this Assistance Request.

    Some conferences use this status, while some use the Completed status and indicate in the Request Notes that no assistance was provided.

    Note: The Activity Summary report only processes requests with a status of Completed or Denied

  - **Canceled.** This status indicates that the Assistance Request should not have been entered and is not valid. This could occur if a duplicate Assistance Request was entered.

    Note: If a duplicate Assistance Request was entered then the request could be deleted by a Conference Administrator (there is no value to not deleting a canceled Assistance Request). Canceled Assistance Requests are not included in any Activity Summary, Conference Activity or Financial Reports.

- **Request Date.** The date the request was received. This date defaults to today's date, but can be changed, if needed.
- **Visit Type.** Select the appropriate visit type that should be associated to the request. Visit totals for each of these visit types are available on the **Activity Summary Report**.
  - **Home.** Select this option if a home visit will be completed. You can also assign the home visitors (primary and secondary) to the request.
  - **Other**
  - **Telephone**
  - **Prison**
  - **Hospital**
  - **Eldercare**
  - **Church/Pantry** if applicable.

  NOTE: Telephone and Church/Pantry visit types are not recognized by Saint Vincent de Paul National (are not reported on the Annual Report). These visit types can be turned off, if needed, by selecting the **Suppress Non-National Visit Types** option on the **Admin** > **Conference Details** > **Configuration Options** tab.

- **Assigned To (1 and 2).** Use these fields to select the conference member to whom you are assigning this neighbor request.
- **Mileage and Hours.** If your conference has enabled the tracking of miles and hours in service, you can enter the mileage and/or hours associated with the home visit. The entry on the assistance request will be automatically copied to the **Mileage/Hours in Service** page for reporting purposes (so

that you do not have to enter the information twice). If conference members are selected in both the **Assigned To 1** and **Assigned To 2** fields, the hours and miles entry will be applied to the **Assigned To 1** conference member (hours and miles totals are not divided in half and assigned to both members).

- **Helped.** Enter the total number of people helped to be entered for these types of visits (not normally used for Home Visits).
  - This value overrides the number of family members on the assistance request family members tab.
  - If entered, this value will be used in the reports that calculate the number of people helped. It is assumed all people associated with this entry are adults.
  - If entered, this value will be shown on the **Assistance Request Call Record** report.
  - There is an information icon to the right of the 'Helped' label. If the mouse pointer is placed over this icon the description of the field will be shown.
- **Scheduled Date.** If you enter a date in this field, the home visit will appear on the conference calendar on the home screen. If you do not want the visit to show on the Home page calendar, you can turn off this feature using the **Prevent Visit Display on Calendar** option on the **Admin** > **Conference Details** > **Configuration Options** tab (only administrators can enable this option).
- **Referral Information.** Use this option to capture referral information for one of the following scenarios:
  - Document a referral to another organization. You can add up to four referral agencies to one request. Referral agencies must first be added by your conference administrator.
  - Document a referral to another conference. You can enter the name of the conference to which you are referring the neighbor.
  - Select a **Referred From** organization. Your conference administrator can add the organizations that you regularly work with to this list.

Notes can be captured in this section as well.

Family Members. Information on this tab is read only. To make changes to the neighbor's family member information, access the **Edit Neighbor** page to update family members.

Assistance. Use this tab to capture information about any assistance provided for this request. You can edit an existing assistance item or click **New Assistance Item** to add new assistance information. Assistance types are predefined by your conference administrator.

A few items to note:

- If you are adding utilities as the assistance type, the neighbor accounts defined on the **Neighbor Account** tab can be selected to populate various fields on the assistance. If no neighbor account is selected (detail may not exist) the details can still be entered.
- If you are entering rent assistance (the assistance type can either begin or end with the word **Rent**), the landlords/housing providers that are predefined by your conference administrator are available for selection. In order to include landlord contact information a landlord must be selected from the list.
- If you select an assistance type that is set up as a direct payment voucher (DPV), you can add a quantity and the value will auto-populate. Direct payment vouchers are set up by your administrator and most times are set up with a default value per voucher.
- For reporting purposes, the assistance request will be tracked by the **Date Provided** once the request is marked **Completed**.

- Use the **Pending** check box to indicate that this assistance has not yet been provided to the neighbor. Later, you or another user can view all conference pending assistance requests by clicking the **View** menu and clicking **Pending Assistance**.

Request Files. You can upload files that are associated with the request (such as receipts or copies of utility bills).

History. Information on this tab shows all history information for this neighbor.

- Click **Save**.

Edit an Existing Assistance Request

1. Do one of the following:
    - From the **Neighbors** page, click the **History** icon, and then click **View** for the appropriate assistance request that you want to edit.
    - From the **Requests** page, search for the existing request using the search box in the top right and/or filter the results by status or by the primary or secondary visitor assigned to the request (if the conference configuration option to allow a request to be assigned to a conference member has been enabled). Your items selected for filtering the list remains until you either change it or log out of ServWare. Click **Edit** for the appropriate assistance request from the search results.
2. Update the request information. For details about the five tabs of the assistance request, see Add a New Assistance Request.

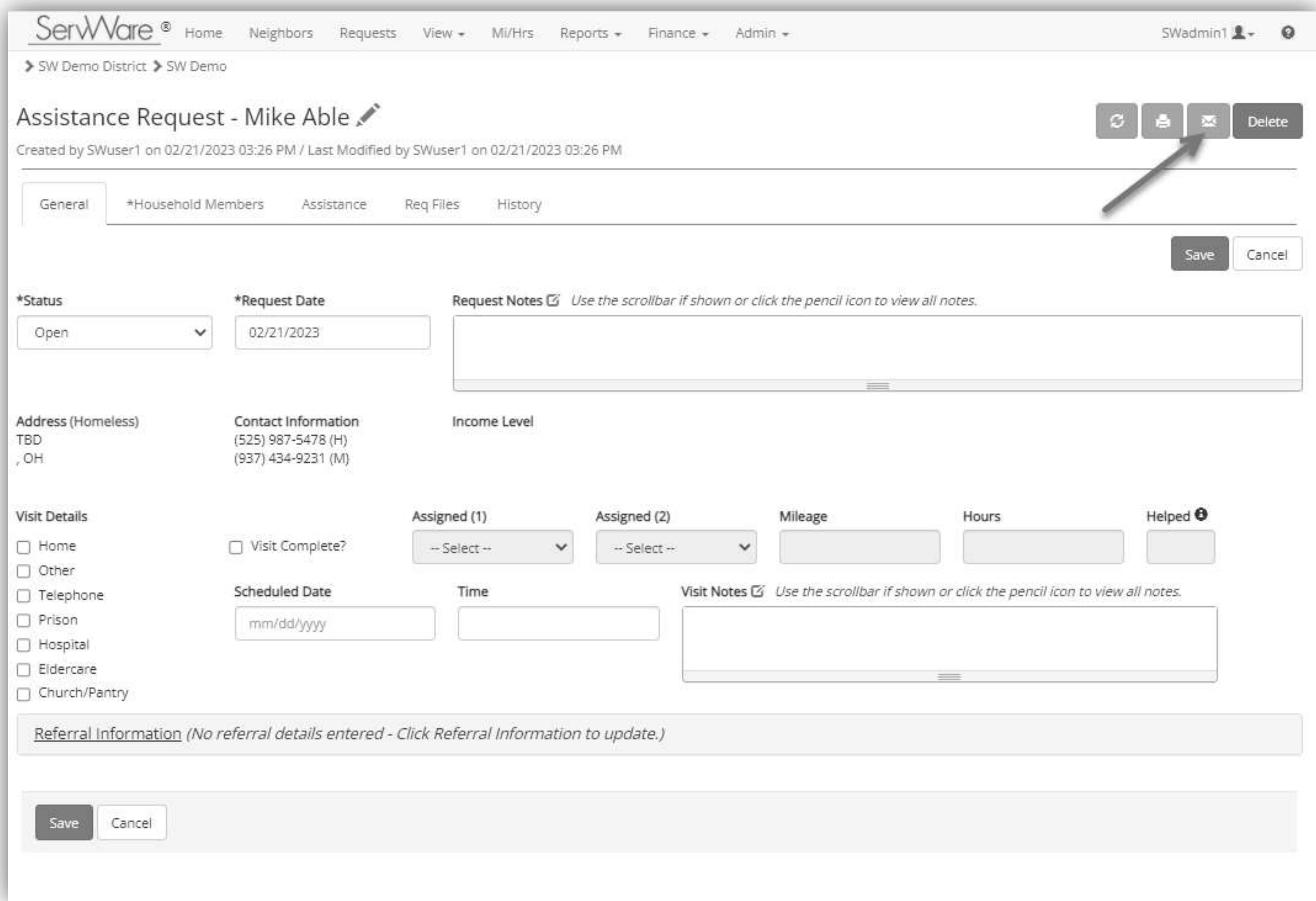
    The referral information area on an assistance request will NOT be shown unless referral information has been entered. This is to save space on the page if no referral information has been entered.

    Note: To open the area to enter referral information, click the underlined **Referral Information** label.
3. Click **Save**.

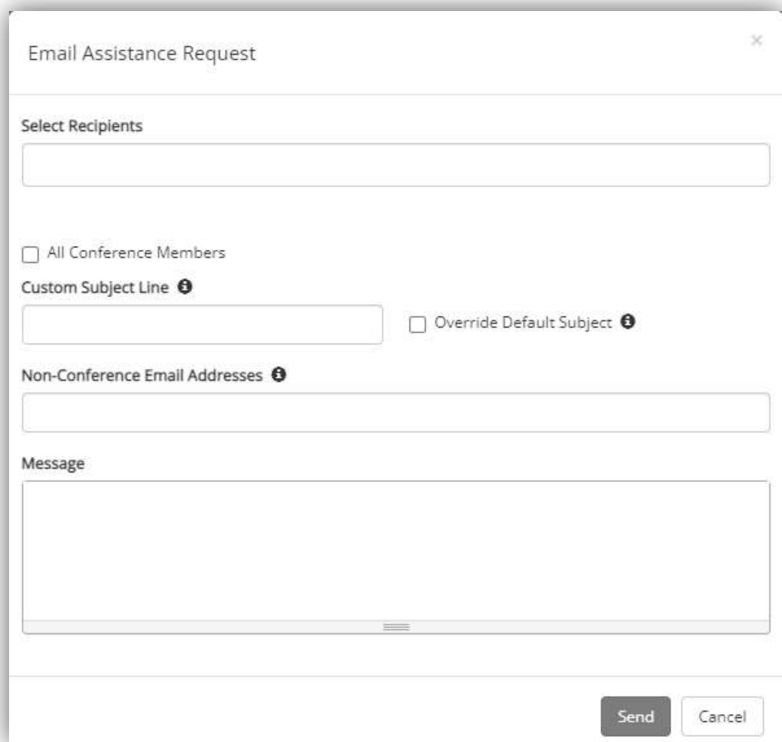
Email an Assistance Request

You can email an assistance request to any other conference member by doing the following:

1. While viewing the assistance request that you want to send via email to another conference member, click the email option in the top right.



In the **Select Recipients** box, click and select the conference members to whom you want to email this request, or select **All Conference Members** if you want to email this request to all active members in your conference. You can type a custom subject line if you would like to override the default, system-generated subject line.

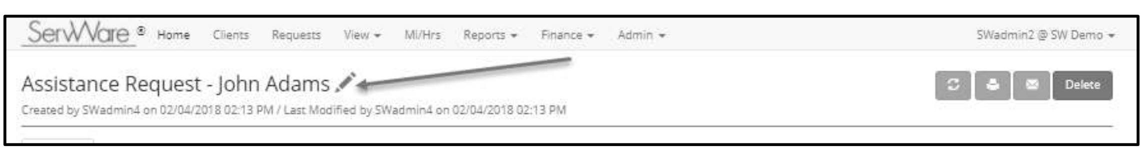


2. Type any information that you want to include for the recipient in regards to the assistance request.
3. Click **Send**.
   The email is sent to the conference member(s) and will include your name as well as your note and a link to the assistance request. The email will not contain any personal information contained in the assistance request. The recipient of the email will need to click the link inside the email and then log into ServWare to view the assistance request.

Refresh Neighbor Data

If you need to update neighbor information, such as address, contact, or family members, after an Assistance Request is started, you can do the following to easily update the information and then return to the original assistance request:

1. Click the pencil icon to the right of the neighbor's name to make changes to the neighbor information.



2. Make changes as needed to the neighbor information, and click **Save** to save your changes. The updated information is automatically saved to any requests for this neighbor that are in an open status, such as **Open**, **Open – Need Reviewed**, or **Completed – Needs Review**.
3. After saving your changes, click the **History** tab for the neighbor record.
4. From the **History** tab, select the **View** option for the assistance request that you were adding to return to the appropriate assistance request page.
5. If you need to update a historical request for the neighbor that is not in an open status, click the refresh icon ( ) at the top right of the **Assistance Request** page to update the neighbor information on the historical request.

Home Visitor Activities

Home visitors can access the assistance request for the neighbor and enter home visit information, including notes about the visit into the request.

1. Do one of the following:
   - From the **Neighbors** page, click the **History** icon, and then click **View** for the appropriate assistance request that you want to edit.
   - From the **Requests** page, search for the existing request using the search box in the top right and/or filter the results by status or by the primary or secondary visitor assigned to the request (if the conference configuration option to allow a request to be assigned to a conference member has been enabled). Your items selected for filtering the list remains until you either change it or log out of ServWare. Click **Edit** for the appropriate assistance request from the search results.
2. Capture home visit information on the **General** tab.
3. If assistance has been provided during the visit, capture the information on the **Assistance** tab. For additional information about adding assistance information, see **Record Assistance Provided** below.
4. Mark the home visit complete.
5. If the request is complete, change the status of the assistance request on the **General** or **Assistance** tab to **Complete**.

View Pending Assistance

From the **View** menu, click **Pending Assistance** to view all pending assistance. You can view the primary home visitor assigned to this request, if applicable. Click **Edit** to view and manage assistance items for the request. Use the print icon in the top right to print the Pend**ing Assistance** list if needed.

Record Assistance Provided

To record assistance provided, do the following:

1. While viewing an assistance request, click the **Assistance** tab.
2. To record a new assistance item, click **New Assistance Item** and then do the following:
    a. Select the appropriate **Assistance Type** from the list.
    If you select a Direct Payment Voucher (DPV) item, the remaining quantity displays in parentheses.

    The following situations may apply:

    - If you select the **Rent** assistance type, you can optionally select from a list of landlords if your conference administrator has entered landlords into ServWare. You can use the search box to locate a landlord if the list is long.
    - If you select the **Utilities** assistance type, you can optionally select from a list of utilities if your conference administrator has entered your local utility companies into ServWare.
    - If you select the **In-Kind** assistance type, you can optionally select from a list of In-Kind Categories that have been added by your administrator.

    If an assistance type is selected that is associated with a special program and the neighbor has been assigned to the special program then:

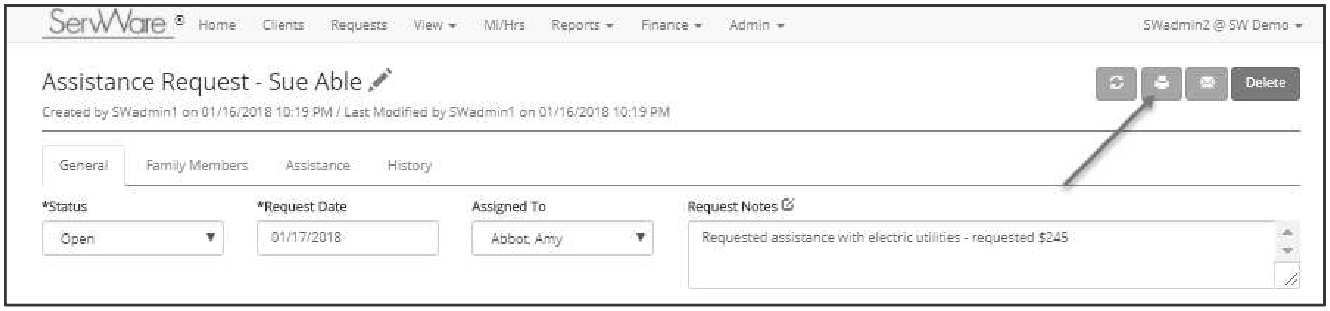
    - If there is no date removed for the program then allow the special program to be associated if the date provided is after the date assigned
    - If no date provided then allow the special program to be associated if the current date is after the date assigned.

    b. Add a monetary value for the item. This is a required field but can be set to $0 if needed.
    c. All other items on the **New Assistance Item** tab are optional, but you should keep the following in mind:

    - The **Date Provided** should be captured so that the assistance can be accurately counted against the correct financial period for conference reports.
    - The **Pending** flag should be used if the assistance has been promised but should not be recorded yet. Any pending assistance items are viewable under the **View** > **Pending Assistance** menu option.
    - Check numbers, if applicable, can be entered for the assistance provided. An activity check report can be generated to show checks written for specific assistance requests. This report is located in the **Reports** > **Activity Check Report** menu.
    - Notes applicable to this assistance request can also be captured. The notes field will allow up to 8000 characters.

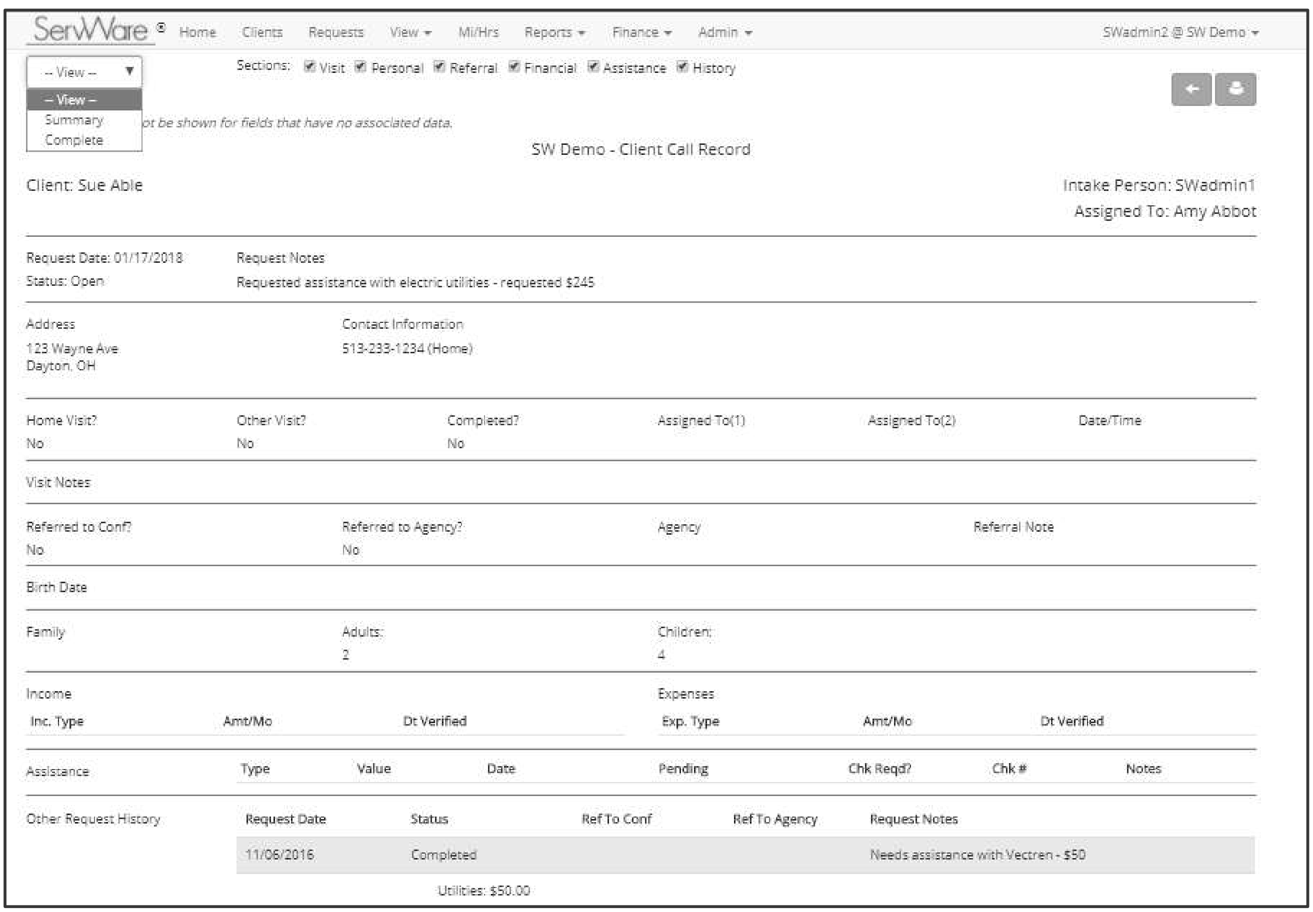
Print Assistance Request

You can print an assistance request in several different formats. While viewing an assistance request, click the print icon at the top right of the screen.



Select the options for the printed assistance request and then click the print icon.

- From the **View** menu, select **Summary** or **Complete**. The summary options displays an abbreviated version of the neighbor request, and the complete version displays all data that has been captured for the neighbor (such as income, expenses, family members, etc.) and the request.
- You can filter the information that displays on the printed assistance request by selecting the appropriate boxes at the top.

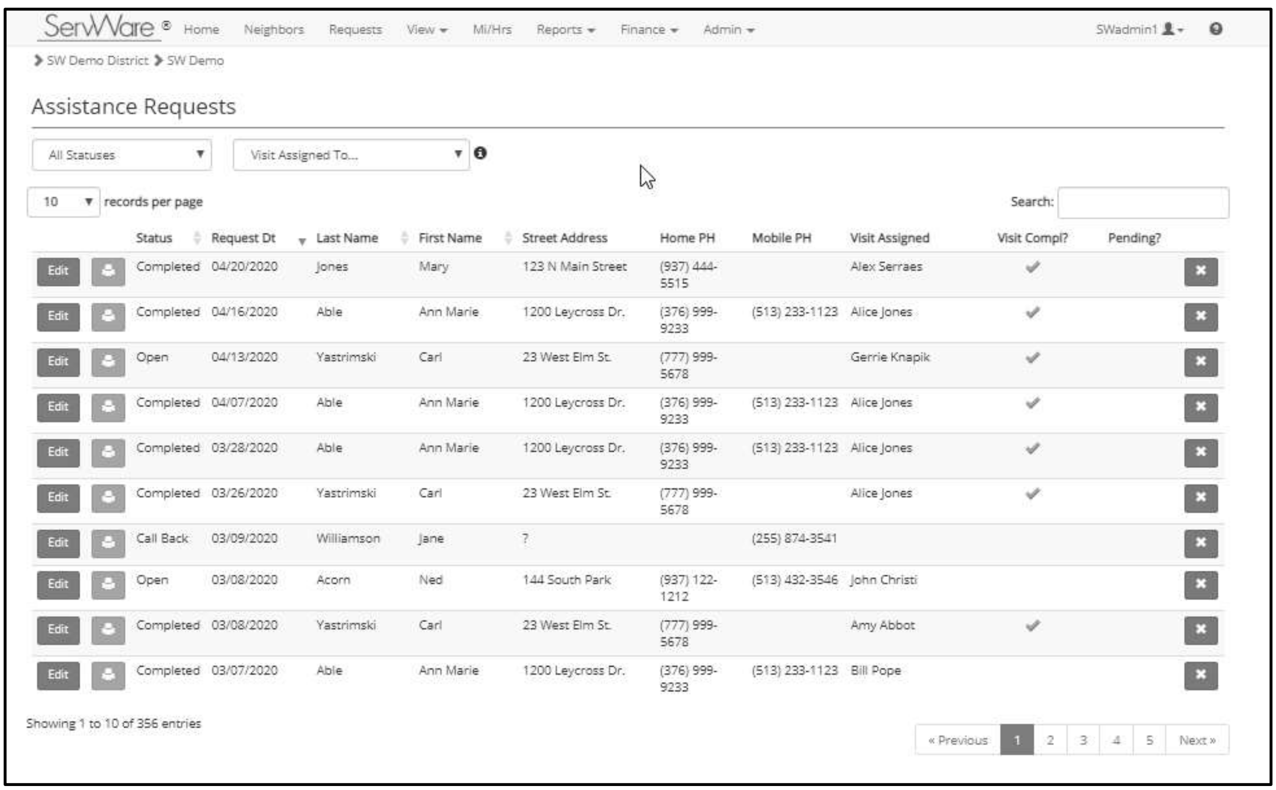


Closing a Request

An assistance request is only counted on a conference report when it is marked complete. Ensure that your conference does not leave assistance requests in an open state if the request is no longer active (no further activities are occurring for the particular request).

There are a couple ways that you can view information related to requests:

- From the **View** menu, select **Pending Assistance**. The **Pending Assistance** list displays all pending assistance from open requests. This includes the assistance type, amount, promised date, and indication if a check was requested (if applicable).
- Click the **Requests** menu to view open requests. You can then filter the requests by a status and/or by the conference user assigned as the primary or secondary visitor assigned on the request. On the requests list, the street address displays except in the following two instances:
    - If your conference is using case numbers, they will display instead of the neighbor address.
    - If your conference is configured as part of a partner conference set up, then the street address is replaced with a Conference column which displays the name of the conference that is assigned to the request. Case numbers may also display if they are configured for the partner conference.


SerVVare® Home Neighbors Requests View Mi/Hrs Reports Finance Admin SWadmin1

SW Demo District > SW Demo

Assistance Requests

All Statuses | Visit Assigned To...

10 records per page | Search:

		Status	Request Dt	Last Name	First Name	Street Address	Home PH	Mobile PH	Visit Assigned	Visit Compl?	Pending?	
Edit		Completed	04/20/2020	Jones	Mary	123 N Main Street	(937) 444-5515		Alex Serraes	✔		✖
Edit		Completed	04/16/2020	Able	Ann Marie	1200 Leycross Dr.	(376) 999-9233	(513) 233-1123	Alice Jones	✔		✖
Edit		Open	04/13/2020	Yastrimski	Carl	23 West Elm St.	(777) 999-5678		Gerrie Knapik	✔		✖
Edit		Completed	04/07/2020	Able	Ann Marie	1200 Leycross Dr.	(376) 999-9233	(513) 233-1123	Alice Jones	✔		✖
Edit		Completed	03/28/2020	Able	Ann Marie	1200 Leycross Dr.	(376) 999-9233	(513) 233-1123	Alice Jones	✔		✖
Edit		Completed	03/26/2020	Yastrimski	Carl	23 West Elm St.	(777) 999-5678		Alice Jones	✔		✖
Edit		Call Back	03/09/2020	Williamson	Jane	?		(255) 874-3541				✖
Edit		Open	03/08/2020	Acorn	Ned	144 South Park	(937) 122-1212	(513) 432-3546	John Christi			✖
Edit		Completed	03/08/2020	Yastrimski	Carl	23 West Elm St.	(777) 999-5678		Amy Abbot	✔		✖
Edit		Completed	03/07/2020	Able	Ann Marie	1200 Leycross Dr.	(376) 999-9233	(513) 233-1123	Bill Pope			✖

Showing 1 to 10 of 356 entries

« Previous 1 2 3 4 5 Next »

Contact Information
info@servware.org

Treasurer Activities

Since all conferences conduct business differently, the following topics are available here as a general guideline to some features in ServWare that may help support a treasurer's workflow.

View Pending Assistance

From the **View** menu, click **Pending Assistance** to view all pending assistance. You can also view the primary home visitor assigned to this request, if applicable. Click **Edit** to view and manage assistance items for the request. The pending assistance list can also be printed or exported using the buttons at the top right of the page.

Record Assistance Provided

To record assistance provided, follow the instructions that are found in the Record Assistance Provided topic.

Add Conference Expenditures, Receipts, and Deposits

If you want to track conference expenditures, receipts, and deposits, you can so from the **Finance** menu. Your conference must have the finance options turned on for your conference in order for this menu to appear. Contact your ServWare administrator if you need this option enabled. Your conference administrators have to add expenditure, receipt, and deposit types so that they are available for selection when adding items in these areas.

- **Expenditures.** You can track conference expenditures, such as twinning or food pantry purchases in this area. Expenditures are **not** reported on the **Activity Summary Report**. Instead, you can run an **Expenditure Summary Report** or an **Expenditure Detail Report** from the **Finance** menu to view all expenditures for the reporting period (fiscal or calendar) that is assigned to the conference in the conference configuration options. You can also use the print option at the top right to print this report. Use the **Export** button at the top right of the screen to export the expenditure information into a format that can be opened in Microsoft Excel or another spreadsheet program.
- **Receipts.** You can track conference receipts, such as twinning or parish donations in this area. You can run a **Receipt Summary Report** or the **Receipt Detail Report** from the **Finance** menu to view all receipts for the reporting period (fiscal or calendar) that is assigned to the conference in the conference configuration options. You can also use the print option at the top right to print this report. Use the **Export** button at the top right of the screen to export the receipt information into a format that can be opened in Microsoft Excel or another spreadsheet program.
- **Deposits.** You can track conference deposits from this area. You can run a **Deposit Summary Report** or a **Deposit Detail Report** from the **Finance** menu to view all deposits for the reporting period (fiscal or calendar) that is assigned to the conference in the conference configuration options. You can also use the print option at the top right to print this report. Use the **Export** button at the top right of the screen to export the deposit information into a format that can be opened in Microsoft Excel or another spreadsheet program.

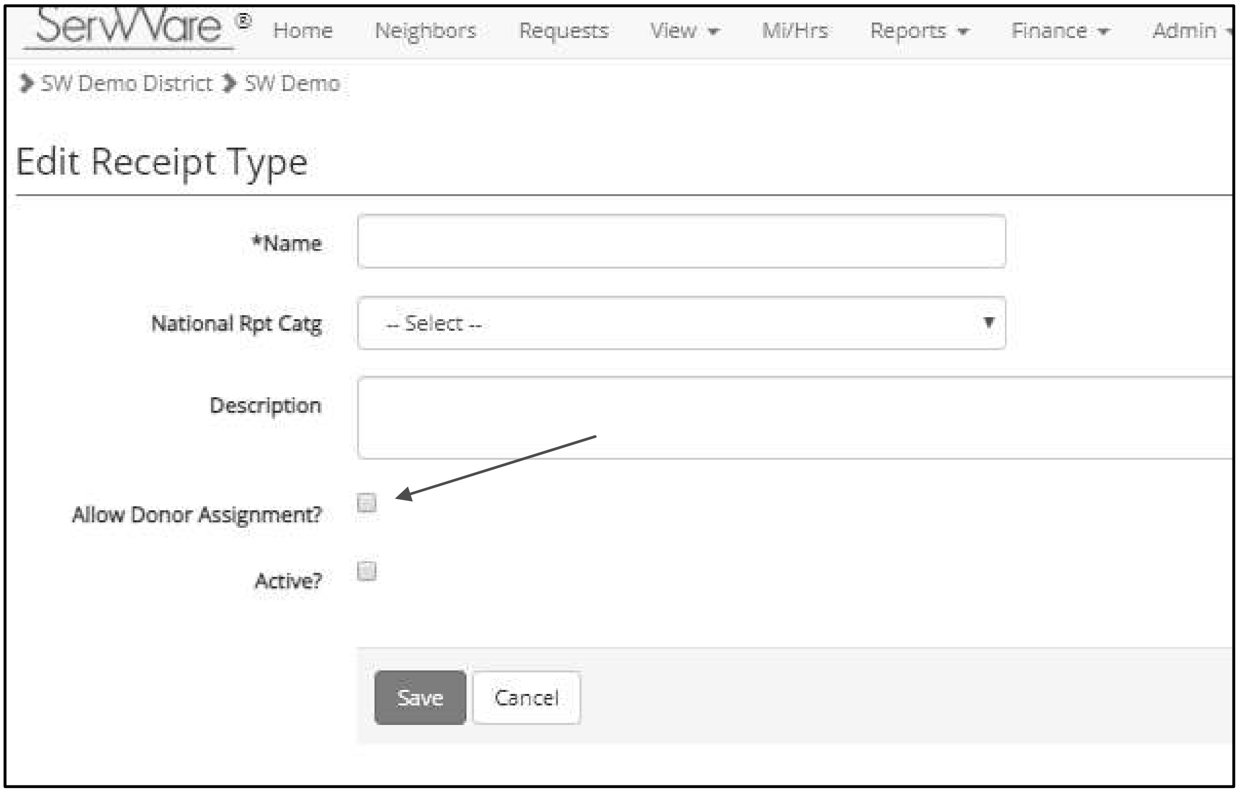
Run a Cash In/Cash Out Report

If you have tracked your receipts and expenditures in ServWare, you can run a **Cash In/Cash Out** report. From the **Finance** menu, select **Cash In/Cash Out Report**. This report displays the summary view of totals per receipt and expenditure type (totals for each) for a specific time period. The report displays for the reporting period assigned to the conference (default is fiscal year, but can be changed to calendar year in the conference configuration options). You can change the start month and end month as well as the year to see the results for any time period you choose. Click the refresh icon to refresh the report after making any changes to the date range. You can also use the print option at the top right to print this report.

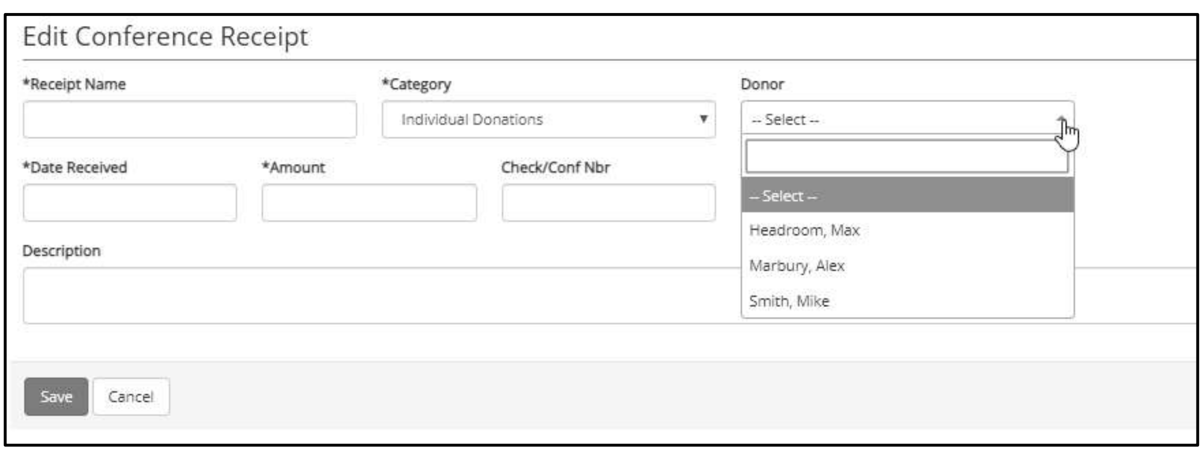
Donors and Donations

To add donors and donations, do the following:

1. Donations are considered receipts. Select the **Allow Donor Assignment?** box for the receipt type(s) that you want to associate with donations.



2. From the **Finance** menu, select **Conference Donors**.
3. Click **New Donor** to add a new donor for your conference.
4. To add a donation, do one of the following:
    a. Click **Donation** next to the left of the donor's name. Enter the donation information and click **Save**.
    b. From the **Finance** menu, click **Conference Receipts**, and then select **New Conference Receipt**. When creating the new receipt entry, select the receipt category that you assigned to donors (as shown in step 1 above. Then select the appropriate **Donor**, and enter the donor information. Click **Save**.



5. To report on donor information, do one of the following:
    a. From the **Finance** menu, select **Donor Reports** > **Conference Donor Report** to view or print a complete list of all the active donors for your conference and their contact information.
    b. From the **Finance** menu, select **Donor Reports** > **Donor Receipts Report** to view, print, or export a list of all donations received for the report timeframe (default is fiscal year).
    c. From the **Finance** menu, select Donor Reports > **Donor Summary Report** to view, print, or export a list of donors and their donations per month and year totals for the report timeframe (default is fiscal year).

Tracking Mileage/Hours in Service

If your conference has been configured to track mileage or hours in service, then you can enter these items using the **Mi/Hrs** menu at the top of the page. To view totals for your conference, **Mileage/Hours** i**n Service** reports can be generated from the **Reports** menu.

To search for an existing miles or hours entry, do the following:

1. Click the **Mi/Hrs** menu.
2. Enter the search criteria in the **Search** box at the top right. Search results will display in the list.
   If you want to search by conference member, you can search using both the first and last name if needed.

To add a miles or hours entry, do the following:

1. Click the **Mi/Hrs** menu.
2. Enter the information about the miles traveled or hours spent in service.
   Only the **Date** is required for reporting purposes.

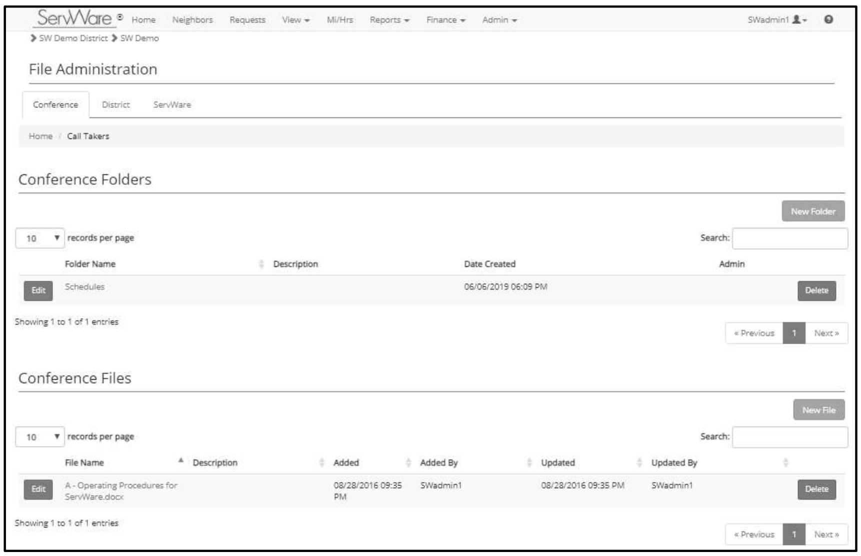
Viewing and Managing Conference Files

ServWare provides a file administration area where you can save files that can be accessed by your conference members. By default, only administrators can upload and manage files in the file administration area. However, there is a conference configuration option that your administrator can turn on to allow all conference members the ability to upload and manage files in this area.

From the **View** menu, select **Files**. There are three tabs on the page that provide access to different files.

- **Conference.** The **Conference** tab can be used to upload files and create folders to organize groups of files for your conference. Files uploaded to this section can only be uploaded at the conference level.
- **District**. Files that are available on the **District** tab (this tab may not be available for your conference if you are not utilizing district features), can only be uploaded at the district level.
- **ServWare**. The ServWare documentation is available on the **ServWare** tab. Files that are available for viewing from this tab have been added by the ServWare administrator. Files that are available on this tab include:
    - **Conference Administrator Guide –** This guide provides descriptions and steps for completing administrator tasks such as configuring ServWare to meet your conference needs, creating member accounts, running reports, and more.

- **Conference User Guide –** This guide provides descriptions and steps for completing conference user tasks such as adding and managing neighbor records, creating assistance requests, and tracking miles and hours, and more.
- **ServWare Activity Summary Report Data Descriptions** - This document describes how the various values on the **Request Activity Summary Report** are calculated.
- **ServWare Conference Training** - ServWare conference training outline.
- **ServWare SVdP Conference Annual Report -** This document describes how ServWare can generate the SVdP conference annual report through configuration of options and the entry of request assistance, receipts, expenses, conference membership information, etc.
- **ServWare SVdP New Conference Checklist -** New ServWare Conference Checklist.



To upload files to the **Conference Files** area, do the following:

6. From the **Admin** menu, select **File Administration**.
7. In the **Conference Files** area, click **New File**.
8. Add a description for the file that are going to upload. This description should help your conference members understand the purpose of the file.
9. Browse to find the file on your computer or device.
10. After selecting the appropriate file, click **Save**.

    Conference folders can be created and used to group files together. For example, you may want to create a call taker folder and upload files that pertain to the call taker activities. After you create a folder, you can upload files to the folder.

To update an existing files in the **Conference Files** area, do the following:

1. Locate the file that you want to replace.
2. Click **Edit** next to the file.
3. Browse and select the new file that you want to upload, add an optional description, and then click **Save**. The newly selected and uploaded file will replace the original file.

District Options

If your conference is part of a District that is using ServWare across multiple conferences within the District, you may have additional options for viewing district neighbor information, district address information, and conference information.

If all of the conferences and the district have agreed to view each other's neighbors, you can search and view neighbors across all of the conferences in your district that are using ServWare. This provides a read only view of the neighbor record for informational purposes only. If your district has uploaded conference boundaries to the district database, you can search addresses within your district to determine which conference is assigned that address. Additionally, you can view conference details for all of the conferences in the District.

View District Neighbors

To search for and view a neighbor record across all of the conferences in your district currently using ServWare, do the following:

1. From the **View** menu, select **District Neighbors**.
2. Use the **Search** box at the top right to determine if the neighbor is already in ServWare. In the search box, you can use one or more of the following items to look for existing neighbors:
   - Search by last name.
   - Search by first name.
   - Search by street.
   - Search by house number.
   - Search by last four digits of SSN.

   The search results display neighbors that match your criteria. In the **Conference** column of the search results, you can view the assigned conference. To view additional information about the neighbor, click **View** to the left of the neighbor's name.

Copy Neighbor Record to Conference

If your district has enabled the option to copy neighbor records from the District View to a conference, you can copy the neighbor data only (not the request history) to your conference using the copy button to the left of the neighbor's name. If the neighbor record has uploaded files, a checkbox will display to allow the files to be copied along with the other neighbor data. You can review the files that will be copied and clear any files that you do not want to copy prior to creating the neighbor record in your conference.

View District Addresses

To search for and view address information across your district, do the following:

1. From the **View** menu, select **District Addresses**.
2. Use the **Search** box at the top to search for an address within your district.
   The search results display addresses that match your criteria. The assigned conference for that address is listed in the **Conf Name** column.

View District Conferences

To view other conference in your District details such as helpline number, contact name, contact phone, contact email address, do the following:

1. From the **View** menu, select **District Conferences**.
2. Use the **Search** box at the top to search for a conference within your district.
   The search results display conferences that match your criteria

   NOTE: This list may not reflect all conferences in the actual District. This will depend on the district configuration and usage in ServWare.

Help and Support

If you have a question about ServWare or have a suggestion for an enhancement, you can access the **Support** page to enter your request.

1. Click your user name that is listed at the top right, and select **Help and Support** from the menu or select the Help icon (question mark) that is located at the top right of the ServWare menu bar.
2. On the support page, select one of the four options:
   - **Support Request**. Use the form to create a new support request within the support portal without leaving ServWare. You should receive a response within 24 hours.
   - **Support Portal**. If you have previously submitted a support request, and have created an account on our support portal, you can log in to the portal to check on the status of the request. You can also submit a new request while you are logged in.
   - **Training Videos.** Use this option to access the ServWare YouTube training videos.
   - **ServWare Files.** You can access the ServWare conference user and administrator guides (available to conference users), and the district user and administrator guides (available to district users). The guides can still be accessed by navigating to the **View**->**Conference Files** page and clicking on the **ServWare** files tab.