How to access ServWare and Login	• Web Browser – Any you prefer
	  a. Main ServWare Site: https://www.servware.org
	  b. Login Page: https://www.servware.org/security/login
	• User Credentials
	  a. Created by ServWare conference administrator; unique across ServWare
	  b. Not case sensitive
	• Password
	  a. Case sensitive
	  b. Default password assignment
	  c. Password strength rules – hover mouse over '?' for tip
	  d. Forgotten password flow - have to enter username on login page then click link
	  e. Change your password - Edit Profile menu option

Home page	• Menu options a. Home returns you to the initial page • Calendar - Displays scheduled visits (home and other visits) and calendar events • Messages - created by ServWare or conference administrator • Recent Clients/Requests – user specific; lists the 5 most recent for the logged in user • Conference statistics • DPV - Direct Payment Voucher quantities if tracked by conference (i.e. gas cards) • Responsive design - Access ServWare on desktop, tablet, iPad, smart phone

Clients Menu Option and Clients	• Neighbor list
	  ○ Searching the neighbor list - name, address, phone, last 4 of SSN, etc. (not DOB)
	  ○ Edit button - update neighbor details; click the Save button to save changes
	  ○ Req button - initiate a new Request for an existing neighbor
	  ○ Info icon - alert note for neighbor shown in the list; Update the alert note field when editing the neighbor; move the mouse arrow over the information icon to display the note
	  ○ History button - View all request history for neighbor over time including monetary totals
	• New button - create a new ServWare neighbor for the conference; click Save button to save changes
	  ○ Initially enter general information (i.e. name, address, etc.) and Save to enable tabs for family members, income, expenses, accounts, files and history
	  ○ Required fields identified with an asterisk
	• Family Members - add/edit family members for the client OR total household counts
	  ○ If entering total household counts…
	    ▪ The adult count includes the neighbor themselves
	  ○ If entering individual family member details...
	    ▪ Do NOT add an entry for the neighbor themselves (this information is on the General tab and they are already counted as one adult)
	  ○ Only relationship type is required for family member entry
	  ○ Birth date is used to calculate ages to determine number of adults/children on reports
	• Create new client request

	○ A new request for the neighbor can be initiated from the neighbor list by clicking on the Req button, <u>OR</u> clicking on the New Request button when editing a neighbor • Deleting a neighbor - Conference administrators are provided a Delete button on the neighbor list that will allow a neighbor to be deleted. Neighbors can only be deleted once all associated requests have been deleted.
Requests Menu Option and Requests	• Requests Menu Option – See Requests that have been initiated for the conference ○ Chronological order with the most recent first ○ Searching options - name, phone numbers ○ Status filter ○ Visit assigned filter ▪ Searches both the second and primary visitors ○ Edit button - update request details; always click the Save button to save any changes ○ Print button - print the request details; ability to selectively print sections • Edit Request ○ General tab – request status, date, notes, home visit details, referral information ▪ Referral information – click on the Referral Information label to expand ○ Neighbor details copied from neighbor information when request created (address, family members) - snapshot in time for neighbor in the history ▪ Refresh neighbor details button on Request page can be clicked to pull neighbor data into Request ▪ NOTE: This is automatically done for any open requests when a neighbor record is saved. • New Request ○ Initiate from Neighbor search or when editing a neighbor ○ Enter General information and Save to see additional tabs • Home/Other/Hospital/Prison/Eldercare Visit ○ Must mark Visit complete to be counted on reports ○ Calendar - If scheduled date entered the request will be displayed on home page calendar and can be clicked to view the request ○ Assign visits to primary and secondary conference members ○ Hours and Mileage (if Mileage/Hours option enabled) ▪ The total hours and mileage for the home visitors assigned can be entered on the request. If entered an entry will be created on the Mi/Hr menu page ○ People Helped – This should only be used to override the number of people entered on the family members tab. For example, for a prison ministry visit where multiple have been seen. • Print request - comprehensive view or summary view (i.e. Home Visitor view) • Email request - Up to 4 specific members or all members. Sends link that when clicked on will open a browser, prompt for user credentials and once logged in, take the user to the specific request • Assistance Tab - specify the assistance provided to the client for this specific request ○ Totals

	○ Provided Date ○ Pending items ○ Check number entry (associated report) • Request Status - once assistance is provided or finished with this specific request the Request Status should be changed to Complete. This can be done on the Assistance tab or the General tab. ○ If done on the Assistance tab be sure to click Save button next to the status
View menu options	• Request Visits - View open request visit details, assigned to, etc. • Pending Assistance - View requests with pending assistance; shows total pending amount • Landlords/Housing – Add/edit/view/print landlord/housing provider information defined by the conference • Referral Agencies – View/print referral agency information defined by the conference • Utilities – View/print utility company information defined by the conference • District Conferences – View the district conference details defined in ServWare associated with the conference for the logged in user. • Conference Files - Access conference folders and files for a conference; administrator can create folders/upload files (all user upload option) a. Access ServWare documents on the ServWare tab. • Calendar Events - Create or view calendar events which are display on the home page calendar
Reports	• Helpline/Request Activity Report – High level summary of request details for the previous two weeks. Good for conference meetings to review recent request activity. • Activity Summary - Corresponds to totals required for District reporting • Activity Detail – Provide similar categories to the summary report (i.e. call only, home visit, etc.) but for each specific request • Activity Check - Shows all requests that have a check number associated with assistance • Mileage/Hours - Displays mileage/hours in service totals by conference member or unassigned, and grand total for the conference based on date range • Conference Members Report • Conference Membership Summary Report - based on annual report requirements; shows member type, age range breakdown, ethnicity breakdown.
Finance	• Note: Only available if the Financial functions have been enabled for a conference • Finance functions - configurable option for a conference a. Expenditures i. Define expenditure types - i.e. Twinning to other conferences, gas card purchases, grocery card purchases, etc. ii. Expenditure entry iii. Expenditure reports - Summary and Detail b. Receipts i. Define receipt types - i.e. Twinning from other conferences, parish donations, grants, individual donations, etc. ii. Receipt entry iii. Receipt reports - Summary and Detail c. Deposits – related to bank account transactions

	d. Donor – Enter/edit conference donors and add donations
	e. Reports
	    i. Receipt/Expenditure/Deposit reports
	    ii. Cash In/Cash Out report - shows both Receipts and Expenditures for comparison
	        1. Can include request assistance if option is enabled
	    iii. Donor Reports

User name menu	• Edit profile/change password
	• Help and Support
	    a. Submit a support request - best option, generates a ticket, assigns to a team member, tracks correspondence, resolution
	    b. Access support portal - view past requests, resolutions, etc.; requires separate user account to be created.
	    c. Training videos – Click to open a new browser tab showing the ServWare You Tube training videos
	• Logout option
	    a. Automatic time out after approximately 60 minutes

Mi/Hrs menu option	• Page for entering mileage and hours in service for conference members

Administration Menu	• Setup for selection boxes (assistance types, income types, expense types, referral agencies, utilities, mileage/hours in service categories, etc.)
	    a. Have to set Active flag to see in selection list - to remove set to inactive
	• Conference Details - Edit conference information including configuration options for enabling additional ServWare features
	• Conference Members
	    a. New members/Existing members - User name guidelines, roles (if enabled), conference contact, email member options
	    b. Passwords - format requirements; move mouse pointer over information icon
	• Messages
	    a. Email to conference members and display on home page
	    b. Ability to format nicely
	• File Admin - Same as View->Conference Files page
	• DPV - Explain Direct Payment Vouchers
	    a. Conference configuration option under Conference Details
	    b. Once enabled flag specific Assistance Types as DPV items (i.e. gas card, bus passes, grocery store card, etc.) and enter the quantity on hand
	    c. As these types of assistance are provided the counts will be adjusted automatically
	    d. Totals will be displayed on the Home page
	• Export Client and Request Data - Export all conference request data to a file that can be loaded into Microsoft Excel