

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 client requests:

- Call taker tasks include searching and/or entering basic client information and initiating assistance requests, and possibly entering assistance details.
- Home visitor tasks include verifying client 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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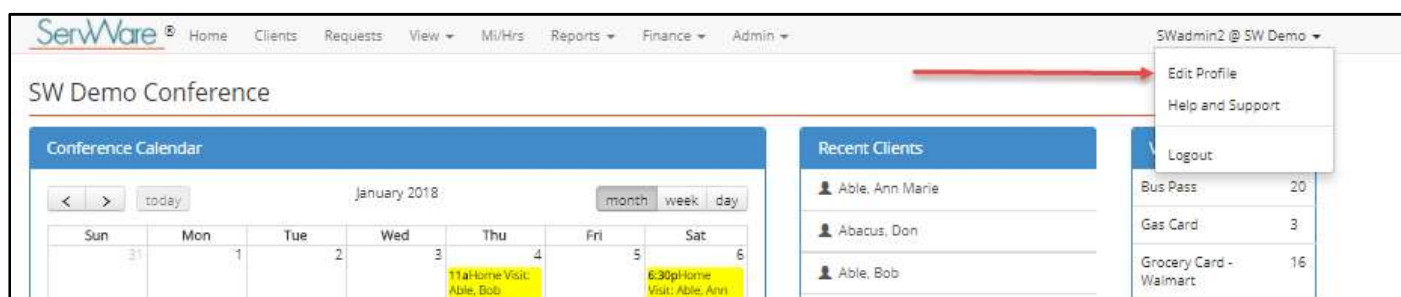
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Managing Your User Profile

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**.



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 Clients.** This area displays the last five client 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 clients, completed assistance requests for the year, etc.
- **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.

The screenshot displays the ServWare Home Page for the 'SW Demo Conference'. The interface includes a navigation bar at the top with links for Home, Clients, Requests, View, Mi/Hrs, Reports, Finance, and Admin. The main content area is divided into several sections:

- Conference Calendar:** A calendar for January 2018 showing scheduled home visits. Notable events include:
 - 11a Home Visit: Able, Bob (Thursday, Jan 4)
 - 6:30p Home Visit: Able, Ann Marie (Pope) (Friday, Jan 5)
 - 12a Home Visit: Test, Christopher (Demo) (Sunday, Jan 7)
- Recent Clients:** A list of the last five clients viewed or edited:
 - Able, Ann Marie
 - Abacus, Don
 - Able, Bob
 - Able, Ned
 - Neuman, Tess
- Recent Assistance Requests:** A list of the last five assistance requests:
 - Bucket, Jack (Open)
 - Johnson, Mike (Open)
 - Bates, Dorina (Completed)
 - Bates, Donna (Open)
 - Able, Ann Marie (Completed)
- Voucher Quantities:** A table showing the remaining quantities of DPV assistance types:

Voucher Type	Quantity
Bus Pass	20
Gas Card	3
Grocery Card - Walmart	16
Kroger Card (\$20)	9
Speedway Gas Card	13
- Statistics:** A table showing conference statistics:

Statistic	Value
Completed Requests- 2018	2
Open Requests- 2018	3
Completed Requests- Jan	2
Home Visits Completed- 2018	1
Home Visits Completed- Jan	1
Total Clients	65

The footer of the page indicates the version: 2017 ServWare © org.servware-1.15.1-20180107-045321.

Call Taker Activities

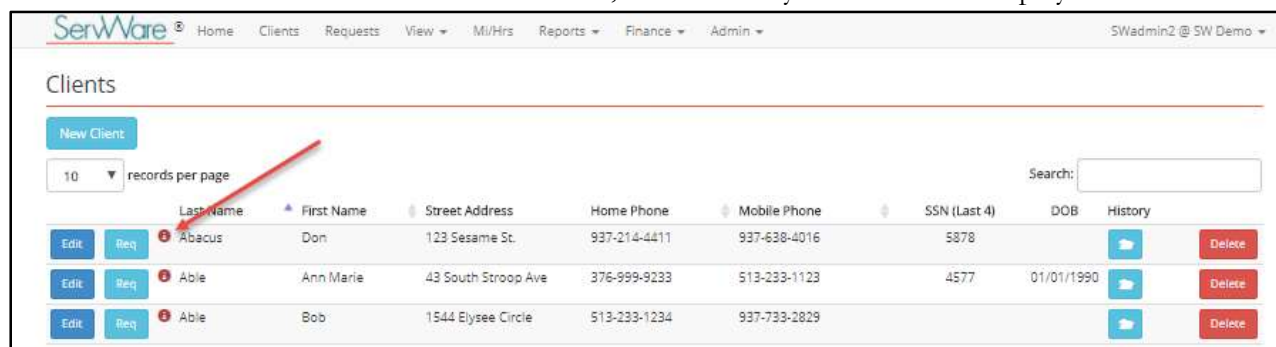
Conference call takers are responsible for verifying that client information is correctly entered into ServWare. It is best practice to search for a client before adding a new record to ensure that there are not duplicates in the application.







Add or Verify a Client

1. Click the **Clients** menu.
2. Use the **Search** box at the top right to determine if the client is already in ServWare. In the search box, you can use one or more of the following items to look for existing clients:
 - Search by last name.
 - Search by first name.
 - Search by street.
 - Search by house number.
 - Search by last four digits of SSN.
3. If the client does not already exist in the system, do the following to add a new client:
 - a. On the **Clients** tab, click **New Client**.
 - b. On the **General** tab, add at least the required information for a client (**First Name**, **Last Name**, and **Address Line 1**). If you do not know the client's address, you can use TBD or some other note to indicate that you do not yet know the client'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 client record or the case number is auto-generated (depending upon the way your conference is configured). Case numbers that are entered on the client record are automatically copied to assistance requests that are created for that client. 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 client searching, but you do not want this individual to show in district client searches, you can select the **Private Client** checkbox on the **General** tab of the client/friend in need record to exclude the individual from District client searches.

Notes about the client 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 client. Alert notes display on the client grid next to the client's name indicated by a red "i" icon. When conference users hover over the alert note, the text that you have added displays.



Last Name	First Name	Street Address	Home Phone	Mobile Phone	SSN (Last 4)	DOB	History
Abacus	Don	123 Sesame St.	937-214-4411	937-638-4016	5878		 
Able	Ann Marie	43 South Stroop Ave	376-999-9233	513-233-1123	4577	01/01/1990	 
Able	Bob	1544 Elysee Circle	513-233-1234	937-733-2829			 

- c. When you are done adding the general client information, click **Save**.

NOTE: If another client 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 client:

- **Income.** You can add income information, such as wages, child support or other income types as applicable to the client. 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 client's income level from the options that your administrator has added. Once selected, the income level and description will be copied to the client/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 client. 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.
- **Family Members.** There are two ways to capture family members for a client. You can only use one method per client record. Once you choose an option for capturing family member information, the other option becomes disabled.

The screenshot shows the ServWare interface for a client named Don Abacus. The 'Family Members' tab is selected, showing two methods for adding family members: 'Adults' and 'Children'. Below these are input fields for 'Adults' and 'Children' with a refresh icon. A 'New Family Member' button is also present. A table lists existing family members:

	First Name	Last Name	Relationship	Age	Last 4 SSN	Drivers License/Id	
Edit			Son	17			Delete
Edit	Jimmy	Abacus	Child	16	4567		Delete

At the bottom, it says: 2017 ServWare © org.servware-1.15.1-20180107-045321

- **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 () to save the information.
- **Enter family members individually.** If you choose this method for adding family members, click **New Family 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.

Family Member for Ann Marie Able

*Relationship

-- Select --

First Name

Last

MI

Birth Date

mm/dd/yyyy

Child?

Last 4 of SSN

Drivers Lic/Id

Gender

--Select--

Ethnicity

-- Select --

Employer

Emp. Length (years)

Education Level

-- Select --

Education Institution

Notes

Save

Cancel

- **Accounts.** You can add accounts for the client, such as their utility accounts, or rent account, etc.
- **Files.** You can upload files that are pertinent to the client record.
- **History.** On the **History** tab, you can view past assistance for the client. This includes the request date, status, and indication if the client 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 Client

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

- If an informational icon is displayed by the client's name, you can hover your mouse pointer over the icon to view an alert note for that client.
- Click **Edit** for the client.
- 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 client search results list.
- View the client's history for an existing or open request. To do this, click the **History** tab from the **Edit Client** page, or click the **History** icon for the client from the **Clients** page. If there is not an existing or open request for this client 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

Showing 1 to 10 of 66 entries

« Previous 1 2 3 4 5 Next »

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 client record on the **Income** tab.

View Landlords/Housing

While you are working with a client, 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 client, 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

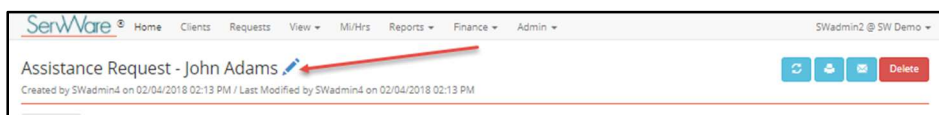
To view general and contact information for all of the referral agencies that are set up for your conference, click the **View** menu and select **Referral Agencies**.


Add a New Assistance Request

1. From the **Clients** page, click **Request** for the appropriate client or from the **Edit Client** page, click **New Request**. Address, contact, and family member information from the client will be copied to the new assistance request. This provides a snapshot in time of the client's address and family situation at the time that this request was initiated.

If the client information changes after the request has been created, you can do the following to update the client's information:

- a) Click the pencil icon to the right of the client name to make changes to the client information.



- b) Make changes as needed to the client information, and click **Save** to save your changes.
 - c) After saving your changes, click the **History** tab for the client 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 client information for this request.
2. 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**.
- **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 type of visit that should be associated to the request. Visit totals for each of these visit types are available on the **Activity Summary Report**.
 - **Home Visit.** Select this option if a home visit will be completed. You can also assign the home visitors (primary and secondary) to the request.
 - **Prison Visit.**
 - **Hospital Visit.**
 - **Eldercare Visit.**
 - **Other Visit** if applicable.

- **Assigned To (1 and 2).** Use these fields to select the conference member to whom you are assigning this client 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).
- **Scheduled Date.** If you enter a date in this field, the home visit will appear on the conference calendar on the home screen.
- **Referral Information.** Use this option if you are referring the client to another organization or conference for assistance. You can add up to four referral agencies to one request. You can enter the name of the conference to which you are referring the client.

Family Members. Information on this tab is read only. To make changes to the client's family member information, access the **Edit Client** 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 client accounts defined on the **Client Account** tab can be selected to populate various fields on the assistance. If no client account is selected (detail may not exist) the details can still be entered.
- If you are entering rent assistance, 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 client. Later, you or another user can view all conference pending assistance requests by clicking the **View** menu and clicking **Pending Assistance**.

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

3. Click **Save**.

Edit an Existing Assistance Request

- Do one of the following:
 - From the **Clients** 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.
- Update the request information. For details about the four tabs of the assistance request, see **Add a New Assistance Request** on the previous page.

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.

- Click **Save**.

Email an Assistance Request

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

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

ServWare Home Clients Requests View M/Hrs Reports Finance Admin SWadmin1 @ SW Demo

Assistance Request - Fred Flintstone

Created by SWadmin1 on 10/07/2016 05:23 PM / Last Modified by SWadmin4 on 09/25/2017 06:11 PM

General Family Members Assistance History

*Status: Open *Request Date: 10/02/2016 Request Notes: Needs assistance with rent.

Address: 1 Rubble Lane, Bedrock, OH Contact Information: 937-214-4411 (Home), 937-225-1545 (Mobile)

Visit Details: Home Visit, Visit Complete?, Assigned To (1), Assigned To (2)

Scheduled Date, Time hh:mm AM/PM, Duration (Minutes), Visit Notes

Referral Information: Referred to Conference, Referred to Agency, Agency 1, Agency 2, Agency 3, Agency 4, Referral Note

Save Cancel

- In the **Send To** list, click and select up to four 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.

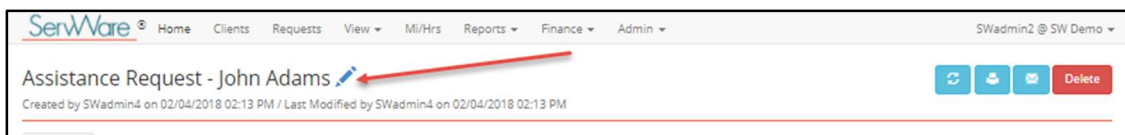
- Type any information that you want to include for the recipient in regards to the assistance request.
- Click **Send**.


The email is sent to the conference member 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 Client Data

If you need to update client 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:

- Click the pencil icon to the right of the client name to make changes to the client information.



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

Home Visitor Activities

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

1. Do one of the following:
 - From the **Clients** 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 **Pending 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.
 - b. Add a monetary value for the item.
 - 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.

The screenshot shows the ServWare web application interface. At the top, there is a navigation bar with links: Home, Clients, Requests, View, Mi/Hrs, Reports, Finance, and Admin. The user is logged in as SWadmin2 @ SW Demo. The main content area displays an 'Assistance Request - Sue Able'. Below the title, it says 'Created by SWadmin1 on 01/16/2018 10:19 PM / Last Modified by SWadmin1 on 01/16/2018 10:19 PM'. There are four tabs: General, Family Members, Assistance, and History. The 'Assistance' tab is selected. Below the tabs, there are four fields: *Status (Open), *Request Date (01/17/2018), Assigned To (Abbot, Amy), and Request Notes (Requested assistance with electric utilities - requested \$245). In the top right corner of the request details section, there are four icons: a refresh icon, a print icon (highlighted with a red arrow), an email icon, and a delete icon.

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 client request, and the complete version displays all data that has been captured for the client (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.

ServWare

[Home](#)
[Clients](#)
[Requests](#)
[View](#)
[Mi/Hrs](#)
[Reports](#)
[Finance](#)
[Admin](#)

SWadmin2 @ SW Demo

-- View --
-- View --
Summary
Complete

Sections: ☒ Visit ☒ Personal ☒ Referral ☒ Financial ☒ Assistance ☒ History

not be shown for fields that have no associated data.

SW Demo - Client Call Record

Client: Sue Able

Intake Person: SWadmin1
Assigned To: Amy Abbot

Request Date: 01/17/2018
Status: Open

Request Notes
Requested assistance with electric utilities - requested \$245

Address
123 Wayne Ave
Dayton, OH

Contact Information
513-233-1234 (Home)

Home Visit?	Other Visit?	Completed?	Assigned To(1)	Assigned To(2)	Date/Time
No	No	No			

Visit Notes

Referred to Conf?
No

Referred to Agency?
No

Agency

Referral Note

Birth Date

Family

Adults:
2

Children:
4

Income

Expenses

Inc. Type	Amt/Mo	Dt Verified	Exp. Type	Amt/Mo	Dt Verified

Assistance	Type	Value	Date	Pending	Chk Req?	Chk #	Notes

Other Request History

Request Date	Status	Ref To Conf	Ref To Agency	Request Notes
11/06/2016	Completed			Needs assistance with Vectren - \$50

Utilities: \$50.00

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 client 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.

Status	Request Dt	Last Name	First Name	Street Address	Home PH	Mobile PH	Visit Assigned	Visit Compl?	Pending?
Completed	01/17/2019	Able	Bob	32 North Hampton St.	513-233-1234	937-733-2829	Amy Abbot	✓	
Completed	01/04/2019	Acorn	Ned	123 South Park	513-233-5454	513-432-3546	Mary O'Connell	✓	
Open	01/03/2019	Able	Sue	123 Wayne Ave	513-233-1234		MaryLou Smith		
Completed	12/06/2018	Able	Jennie	957 Marshall Rd.	938-623-8765		Gerrie Knapik		
Call Back	12/05/2018	Yastrimski	Carl	Unknown	777-999-5678				
Open	12/04/2018	Allison	Robert	765 South Rockport Way	937-331-2233	937-765-9833	Gerrie Knapik		✓
Completed	12/03/2018	Able	Bob	32 North Hampton St.	513-233-1234	937-733-2829	Bill Pope	✓	
Completed	12/01/2018	Mouse	Mickey	123 Main St.	(407) 566-1111		Corpus Christi		
Completed	11/30/2018	Able	Bob	32 North Hampton St.	513-233-1234	937-733-2829	Mary O'Connell	✓	
Open	11/26/2018	Able	Jennie	956 Marshall Rd.	938-623-8765		Mary O'Connell	✓	

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.

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.

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 in 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.

Use the View menu and then select Conference Files to view the **Conference Files** page. 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.

The screenshot displays the ServWare web application interface. At the top, a navigation bar includes links for Home, Clients, Requests, View, Mi/Hrs, Reports, Finance, and Admin. The 'View' menu is currently open, highlighting 'Conference Files'. Below the navigation bar, the page is titled 'Conference Folders' and 'Conference Files'. The 'Conference Folders' section contains a table with two entries: 'Call Takers' and 'Client Documents'. The 'Conference Files' section contains a table with four entries: '2015 SVdP Pantry List-Cent-Wash Twsp.doc', '2015-10 Home Visit Schedule.pdf', 'Client Call Record.pdf', and 'GUIDELINES FOR CALL TAKERS.docx'. A red arrow points to the 'New File' button in the 'Conference Files' section.

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

1. From the **Admin** menu, select **File Administration**.
2. In the **Conference Files** area, click **New File**.
3. Add a description for the file that are going to upload. This description should help your conference members understand the purpose of the file.
4. Browse to find the file on your computer or device.
5. 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 client information, district address information, and conference information.

If all of the conferences and the district have agreed to view each other's clients, you can search and view clients across all of the conferences in your district that are using ServWare. This provides a read only view of the client 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 Clients

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

1. From the **View** menu, select **District Clients**.
2. Use the **Search** box at the top right to determine if the client is already in ServWare. In the search box, you can use one or more of the following items to look for existing clients:
 - 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 clients that match your criteria. In the **Conference** column of the search results, you can view the assigned conference. To view additional information about the client, click **View** to the left of the client name.

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.