



SERVWARE BASIC TRAINING

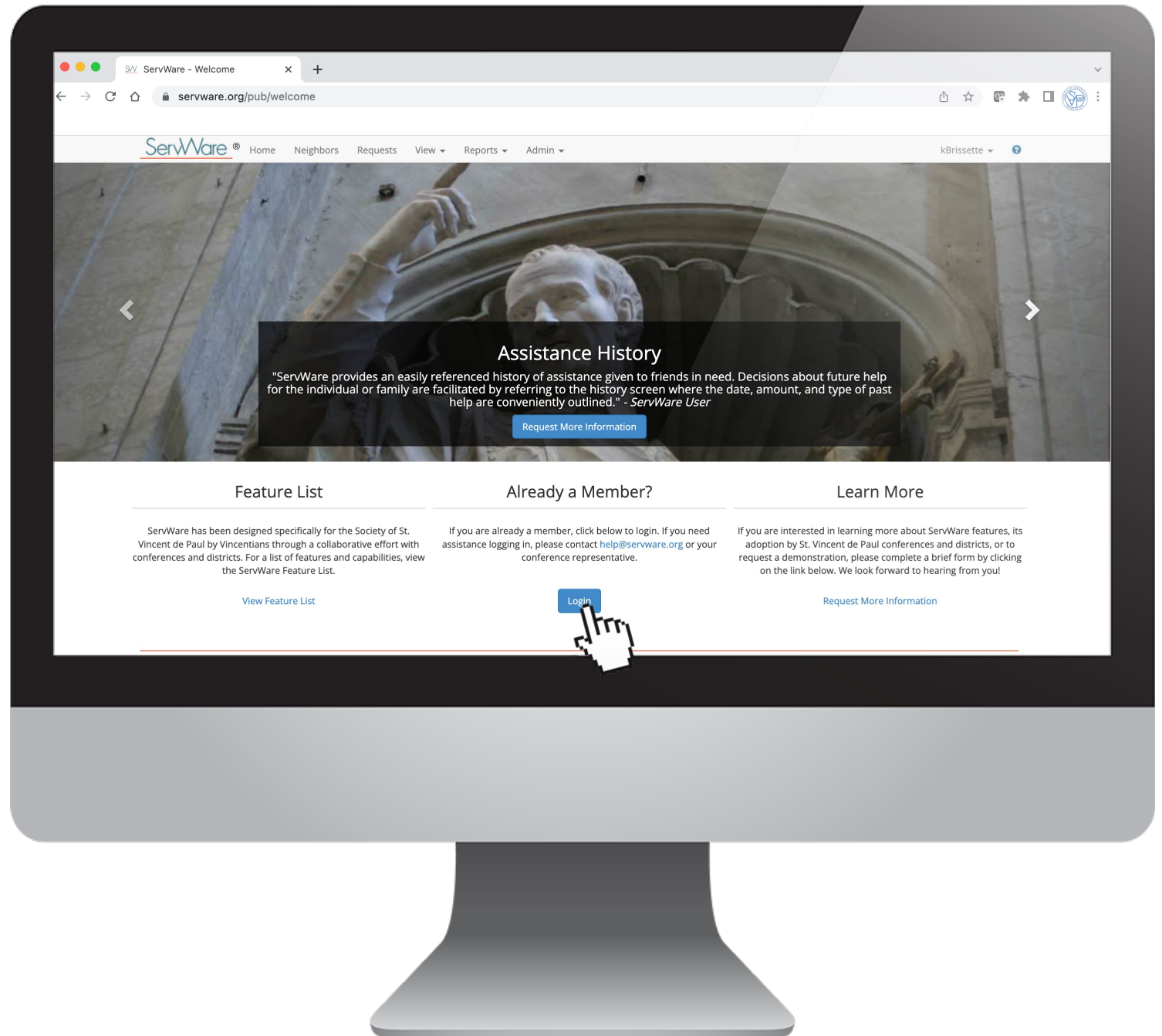
GETTING STARTED

1. Open a browser window.

2. Type in the web address:

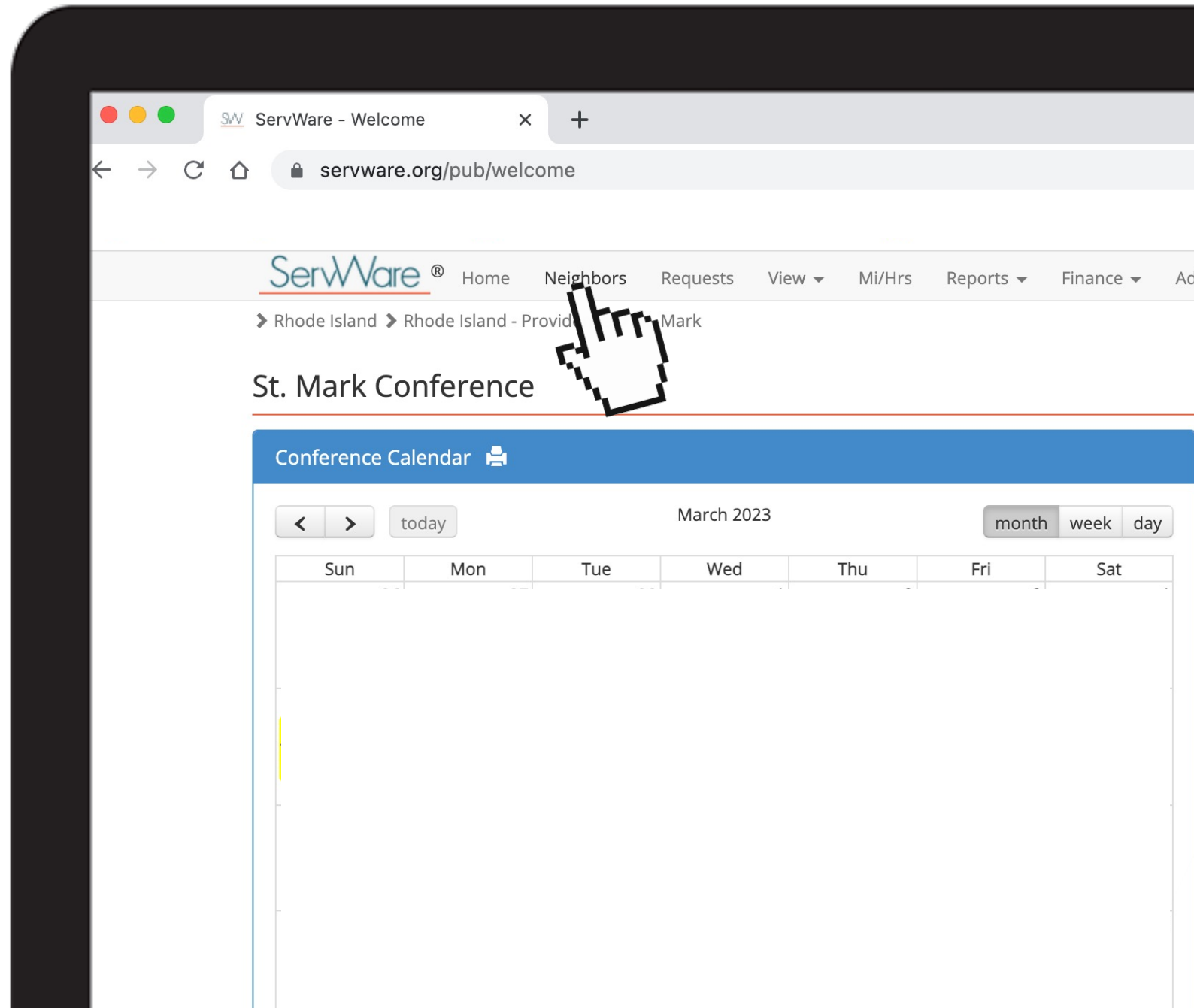
www.servware.org

3. Click **Login**



WORKING WITH A NEIGHBOR

Click **Neighbors** Tab from the menu at the top of the site.



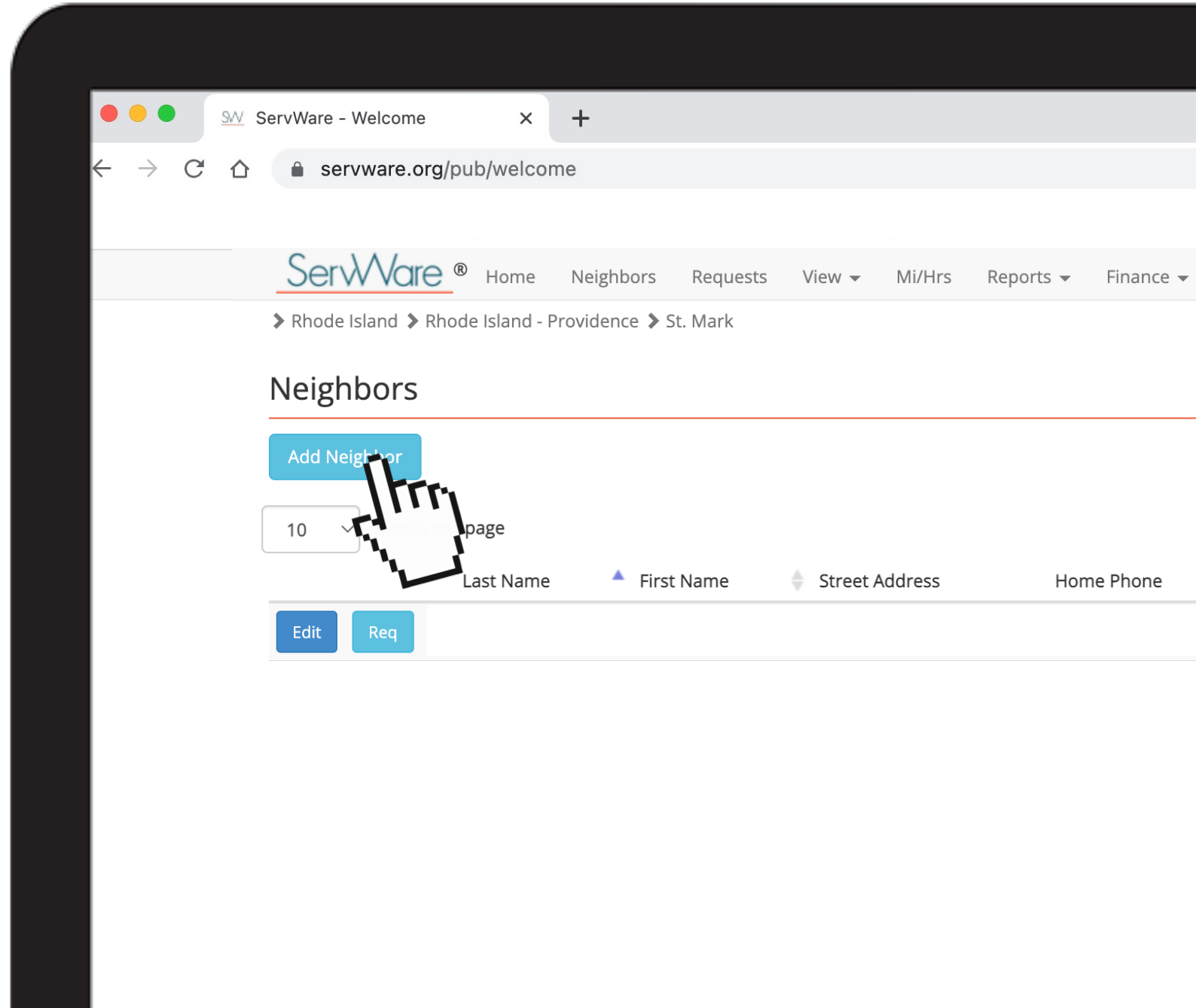
WORKING WITH A NEIGHBOR

SEARCH NEIGHBORS
by typing in name,
address, phone number,
or even birthdate.

The screenshot shows a web browser window with a navigation menu at the top containing 'Sports', 'Finance', and 'Admin'. The user is logged in as 'kBrisette'. Below the navigation is a search section with a 'Search by Birth Date' field containing 'mm/dd/yyyy' and an 'Apply' button. Below that is a 'Search:' field with a hand cursor pointing to it. At the bottom, there are several columns: 'Home Phone', 'Mobile Phone', 'SSN (Last 4)', 'DOB', and 'History'. Below these columns is a list of records, each with a blue folder icon and a red 'X' icon.

ADDING A NEW NEIGHBOR

If no results came up from searching the neighbor, click **ADD NEIGHBOR** button.



NEW NEIGHBOR PROFILE

Minimally type in the following information:

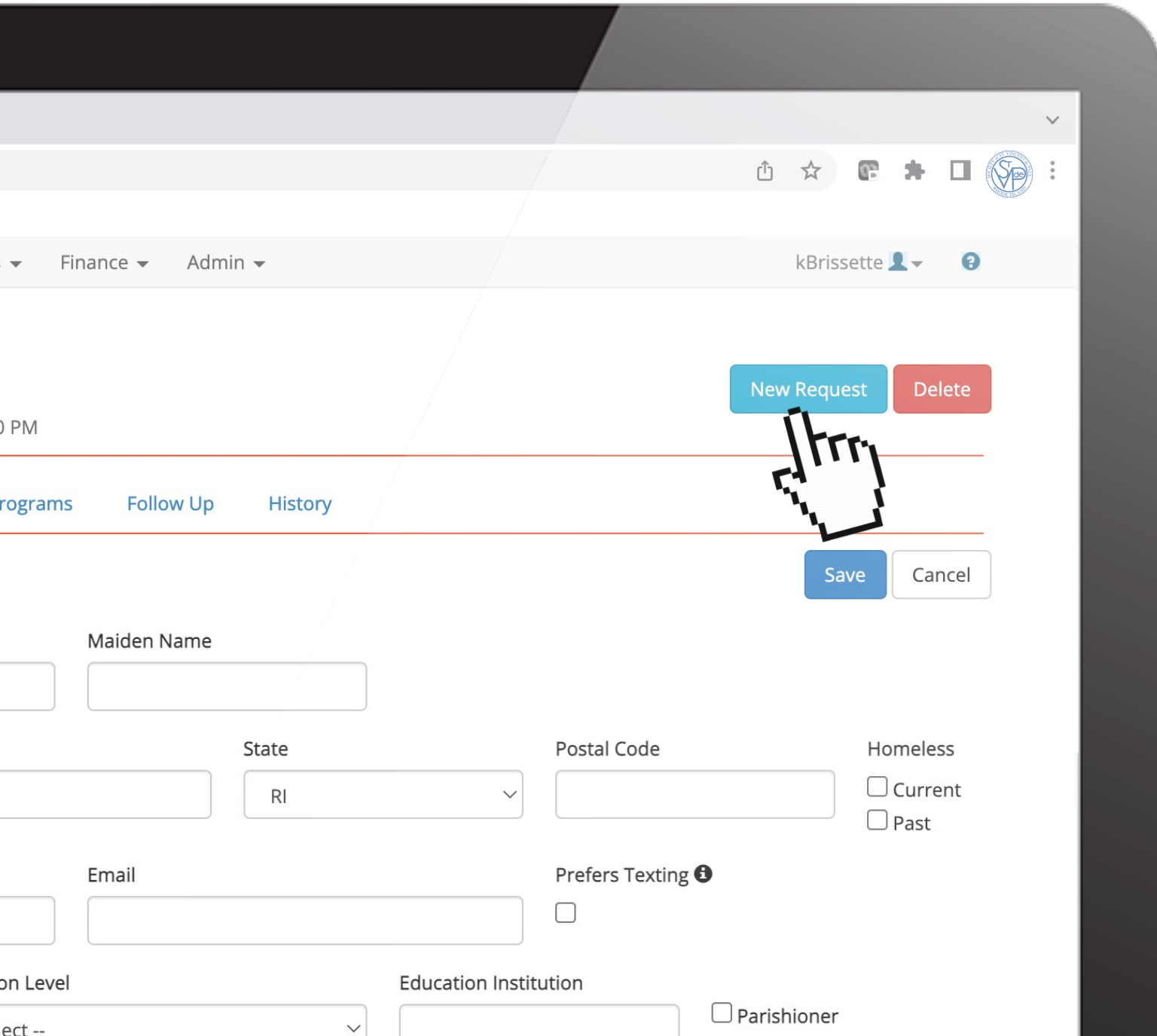
1. First and Last Name
2. Address
3. Phone Number

and click **SAVE** button

The screenshot shows a web browser window displaying the 'New Neighbor' profile form in the ServWare system. The browser address bar shows 'servware.org/pub/welcome'. The form is titled 'New Neighbor' and has a navigation menu with tabs: General, Income/Expenses, Household Members, Accounts, Files, Programs, Follow Up, and History. The 'General' tab is active. The form contains the following fields and options:

- *First Name, *Last Name, MI, Maiden Name (text input fields)
- *Address Line 1, Address Line 2, City, State (dropdown menu with 'RI' selected), Postal Code (text input field)
- Home Phone, Mobile Phone, Work Phone, Email (text input fields)
- Employer, Emp. Length (Yrs), Education Level (dropdown menu with '-- Select --'), Education Institution (text input field)
- Last Four of SSN, Drv License/Id, Gender (dropdown menu with '-- Select --'), Marital Status (dropdown menu with '-- Select --'), Birth Date (text input field with format 'mm/dd/yyyy')
- Military: Veteran, Honorably Discharged
- Ethnicity (dropdown menu with '-- Select --')
- Language (dropdown menu with '-- Select --')
- Religion Pref (dropdown menu with '-- Select --')
- Homeless: Current, Past
- Parishioner: Parishioner, Disabled
- Prefer Texting: (with a help icon)
- ROI Date (with a help icon), USDA Appl Date, Private (with a help icon)

At the top right of the form, there are 'Save' and 'Cancel' buttons. A hand cursor is pointing to the 'Save' button.



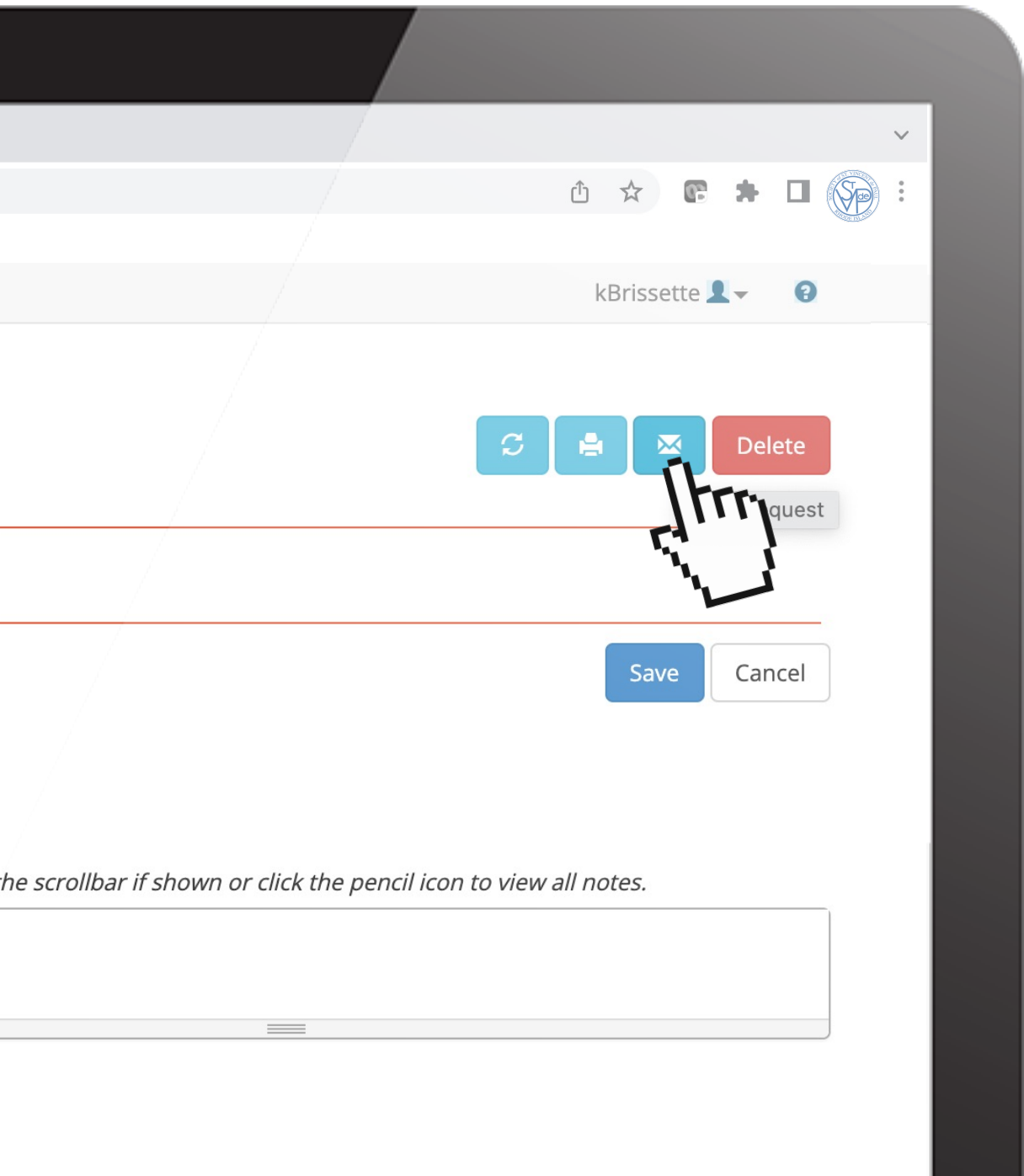
NEW NEIGHBOR REQUEST

After saving the new neighbor, click the **NEW REQUEST**, button to add a new request.

ASSISTANCE REQUEST

1. **Intake Person:** Person who takes the message
2. **Request Notes:** Any information received from the intake call, ie, the need, the situation, the availability of home visit etc.
3. **Visit:** Fill in the details to appear on the calendar, including date, time, and visitors.
4. Click **SAVE**.

The screenshot displays the ServWare web application interface for creating an Assistance Request. The browser address bar shows 'servware.org/pub/welcome'. The navigation menu includes Home, Neighbors, Requests, View, Mi/Hrs, Reports, Finance, and Admin. The user is logged in as 'kBrissette'. The page title is 'Assistance Request - DEMO DEMO'. The form is divided into several sections: 'General' (selected), 'Household Members', 'Assistance', 'Req Files', and 'History'. The 'Intake Person' field is set to 'Brissette, Kathleen'. The '*Status' is 'Open', '*Request Date' is '03/26/2023', and 'Assigned To' is '-- Select --'. The 'Request Notes' field is empty, with a pencil icon to edit notes. The 'Address' is 'DEMO, RI'. The 'Visit Details' section includes checkboxes for 'Home', 'Other', 'Telephone', 'Prison', and 'Hospital'. The 'Visit Complete?' checkbox is unchecked. The 'Assigned (1)' and 'Assigned (2)' fields are '-- Select --'. The 'Scheduled Date' is 'mm/dd/yyyy' and the 'Time' is empty. The 'Mileage', 'Hours', and 'Helped' fields are empty. The 'Visit Notes' field is empty, with a pencil icon to edit notes. A hand cursor is pointing to the 'Save' button.



AFTER VISIT...

- 1. Update Neighbor Profile**
Be sure to fill in the the additional fields on the [General](#), [Income/Expenses](#) and [Household Members](#) Tabs.
- 2. Update Neighbor Request**
After the home visit fill in the, miles, hours, etc. notes from the visit, and click the check the box as completed
- 3. Click the **EMAIL** button to send details to the conference to vote on.**

EMAIL ASSISTANCE REQUEST

1. Click the box for all conference members.
2. Write a Message summarizing the need and what the team would like the conference to vote on
3. Click the **SEND** button.

Requests View ▾ Mi/Hrs Reports ▾ Finance ▾ Admin ▾

Email Assistance Request

Select Recipients

All Conference Members

Subject Line ⓘ

Override Default Subject ⓘ

Message

Send Cancel

CHECK REQUEST

(OFFICIAL "ASSISTANCE REQUEST")

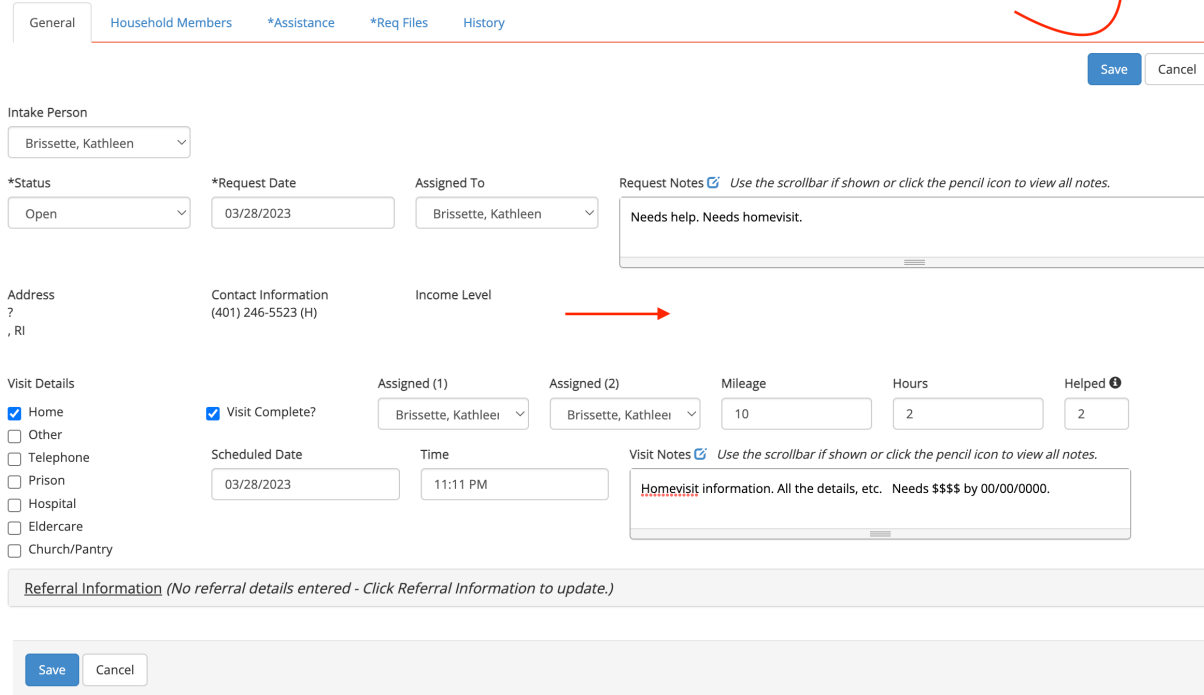
1. Someone calls the line, leave message, we enter in the [Neighbors Page](#) as new neighbor or update any information on an existing profile.
2. Then, you click "[History Tab](#)" on the Neighbors Page and click the "[New Request](#)" Button. You type up the request, schedule home visit, fill in the home visit notes.

CHECK REQUEST

(OFFICIAL "ASSISTANCE REQUEST")

Assistance Request - ?? 

Created by kBrisette on 03/28/2023 11:06 PM / Last Modified by kBrisette on 03/28/2023 11:15 PM




General Household Members *Assistance *Req Files History

Save Cancel

Intake Person
Brisette, Kathleen

*Status: Open *Request Date: 03/28/2023 Assigned To: Brisette, Kathleen Request Notes: Needs help. Needs homevisit.

Address: ? , RI Contact Information: (401) 246-5523 (H) Income Level: 

Visit Details
 Home Other Telephone Prison Hospital Eldercare Church/Pantry

Assigned (1): Brisette, Kathleen Assigned (2): Brisette, Kathleen Mileage: 10 Hours: 2 Helped: 2

Visit Complete? Scheduled Date: 03/28/2023 Time: 11:11 PM Visit Notes: Homevisit information. All the details, etc. Needs \$\$\$ by 00/00/0000.

Referral Information (No referral details entered - Click Referral Information to update.)

Save Cancel

- After a homevisit, we email the "General Tab" from the Assistance Request Page, asking the conference to vote.
- Once majority votes, it is denied, approved, or paused. It is important to have the signed release, license, bills, etc. uploaded to "Req Files" tab.
- Also, filling in all other information in the general tabs like expenses, income, family, etc, as it helps with the vote.

(Click the blue pencil near the name, in order to get to general profile.)

OFFICIAL "ASSISTANCE REQUEST" (CHECK REQUEST)

ServWare® Home Neighbors Requests View MI/Hrs Reports Finance Admin kBrisette

Rhode Island Rhode Island - Providence St. Mark

Assistance Request - ??

Created by kBrisette on 03/28/2023 11:06 PM / Last Modified by kBrisette on 03/28/2023 11:15 PM

General Household Members *Assistance *Req Files History

Request Status: Open Save Status

Add Assistance Item

Assistance	Prov By	Value	Dt Provided	Pending	Promised Dt	Chk Req	Chk/Conf Nbr	Notes
Auto Purchase	Brisette	\$500.00		✓				Delete
In-Kind - Toiletries - Necessities for Neighbors		\$20.00	03/28/2023					Delete

Assistance Total Minus In Kind: \$0.00
In Kind Assistance Total: \$20.00
Total Assistance for Request: \$20.00

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- **If approved**, we go to the "Assistance Tab" from the Assistance Request Page and add the assistance items. From there you can email the assistance request page to President & Treasurer asking to release the payment.
- It is the lead Vincentian on the case's responsibility to get all proper paperwork signed, check property ownership, etc. It is also important to have all additional details for the payment/bill entered into the computer - including address to mail check, etc,