**Helpline ServWare Steps**

**For Additional Assistance Call**:

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# Logging In

1. Web Browser – Any you prefer (Google Chrome, Microsoft Edge, Firefox, DuckDuckGo, etc.)

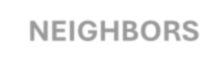
1. Main ServWare Site[: https://www.servware.org](https://www.servware.org/)
2. Login Page[: https://www.servware.org/security/login](https://www.servware.org/security/login) 2. Enter User Name and Password to Log In.

a. Password is Case Sensitive.

# Assisting Neighbor

1. After Logging In, you will now be on the page.



1. Click on **NEIGHBORS** at Very Top of screen to take you the **Neighbors** page.
   1. On **Neighbors** page, type in the neighbor’s last name (or first name if the first name is a very uncommon name) in the “**Search**” field.
   2. Scroll through the names that are returned to see if Neighbor is already in the system. If neighbor has a common name like “Smith”, you will need to click on the “**Next**” button on the right hand side of the bottom of the screen to cycle through all the names.

***TIP: If there are several pages of names, first names at the beginning of the alphabet will be on the first few pages, first names at the middle of the alphabet will be on the middle few pages, and so on.***

**IF NEIGHBOR *IS ALREADY IN* SERVWARE, SKIP TO ROMAN NUMERAL III ON PAGE 2 OF THESE STEPS.**

**I. *If neighbor is NOT in ServWare:***

* + 1. Click on the “” button.
    2. **Ask Neighbor what city he is in.** 
       1. If neighbor is **NOT in Indianapolis** (such as Avon, Beech Grove, Brownsburg, Camby, Greenwood, Plainfield, West Newton, Whiteland), type in the city name in the “**City**” field under **“Find Conference by Address”.** a. Click on **Search**
          1. Click on the appropriate result in the drop-down list on the right.

* + - 1. If neighbor **IS in Indianapolis or Beech Grove And has an address**, type only the street Name in the “**Street Name**” field under **“Find Conference by Address”.** a. Do **NOT** type in street number in any field whatsoever.
         1. Do **NOT** type in City or Zip Code.
         2. Click on **Search**
         3. Click on the appropriate result in the drop-down list on the right. (Note: Several options may appear. Choose the option with the correct corresponding street number).

1. If neighbor is **Homeless**, type in “Uns” in ‘**Search**” field on left under “Indianapolis

Archdiocese — New Neighbor Conference Assignment”

a. Then click the blue plus sign **+** button next to “Unsheltered”.

1. **Entering Neighbors Information** 
   1. Enter Neighbor’s name, address and phone number.
   2. On the right side of the form, you’ll see “**Disabled**” and “**Parishoner**”. Click on either of these if applicable as this information may be important to the conference.
   3. In the “**Alert Note**“ section at the bottom of the form you can type things such as Urgent, Second Request, etc.
   4. Click on the blue “**SAVE**” button.
   5. Go to “**Household Members**” at Top of page.
   6. Enter number of household members and click on blue “**SAVE**” button at immediate right.
   7. Now click on blue “**New Request**” button.
   8. In the “**Request Notes**” field, type the neighbor’s request.
   9. Click on the blue “**SAVE**” button.

**III. *If Neighbor IS ALREADY IN ServWare, ask Neighbor to verify*** ***Phone Number and Address. If NEITHER neighbor’s Phone Number nor Address has changed:***

* + 1. Click on dark blue “**EDIT**” button next to neighbor’s name.
    2. Confirm existing address, phone number and other information with neighbor.
    3. Add any necessary notes to “**Alert Note**” section at bottom of the form.
    4. Click on the blue “**SAVE**” button.
    5. Go to “**Household Members**” at Top of page.
    6. Confirm or change number of household members and click on blue “**SAVE**” button at immediate right.
    7. Now click on blue “**New Request**” button.
    8. In the “**Request Notes**” field, type the neighbor’s request.
    9. Click on the blue “**SAVE**” button.

**B. If PHONE NUMBER has changed:**

1. Click on dark blue “**EDIT**” button next to neighbor’s name and go in and change phone number to new one.

2. Add any necessary notes to “**Neighbor Note**” section at bottom of the form.

* + - 1. Click on the blue “**SAVE**” button.
      2. Go to “**Household Members**” at Top of page.
      3. Confirm or change number of household members and click on blue “**SAVE**” button at immediate right.
      4. Now click on blue “**New Request**” button.
      5. In the “**Request Notes**” field, type the neighbor’s request.
      6. Click on the blue “**SAVE**” button.

1. **If ADDRESS has changed:**
2. Click on the “” button on left side of page.
   * + - 1. If neighbor **IS in Indianapolis or Beech Grove And has an address**, type only the Street Name of the **New Address** in the “**Street Name**” field under **“Find Conference by Address”.**
         2. Do **NOT** type in street number in any field whatsoever.
         3. Do **NOT** type in City or Zip Code.
         4. Click on **Search**
3. **Make note of the CONFERENCE** but **DO NOT CLICK ON** the appropriate result in the dropdown list on the right. (Note: Several options may appear. Choose the option with the correct corresponding street number).

1. Click on **NEIGHBORS** at Very Top of screen to take you the **Neighbors** page.
   * + - 1. On **Neighbors** page, find the Neighbors name again.
         2. Click on “Copy” next to Neighbor’s name.
         3. A box will come up that says “**\*Copy To Conference.”**
         4. Choose the correct conference from the drop-down list.
         5. Click on “**Copy**.”

1. Change Neighbor’s address to new one.
2. Add any necessary notes to “**Alert Note**” sections at bottom of the form.
3. Click on the blue “**SAVE**” button.
4. Go to “**Household Members**” at Top of page.
5. Confirm or change number of household members and click on blue “**SAVE**” button at immediate right.
6. Now click on blue “**New Request**” button.
7. In the “**Request Notes**” field, type the neighbor’s request.
8. Click on the blue “**SAVE**” button.

**YOUR CALL IS NOW COMPLETE.**

**CLICK ON NEIGHBORS AT VERY TOP OF SCREEN TO TAKE YOU BACK TO THE NEIGHBORS PAGE TO BEGIN A NEW CALL AND REPEAT THE PROCESS.**

**BE SURE TO LOG OUT AT THE END OF YOUR SHIFT BY CLICKING ON YOUR USERNAME AT THE TOP RIGHT SIDE OF THE NEIGHBORS PAGE AND CLICKING “LOGOUT”.**