

SERVWARE – CONFERENCE PROCEDURES

Entering Visit Details, Adding Neighbor Assistance items and sending Assistance Request (Referral Form) to Neighbor Services

The Help Desk will email assistance requests to the contact person(s) designated by each conference. The email comes from *no-reply@servware.com*. Conferences can change/update contacts by contacting: Cynthia Coleman (317) 443-2387 or Mary Giles (317) 741-1211.

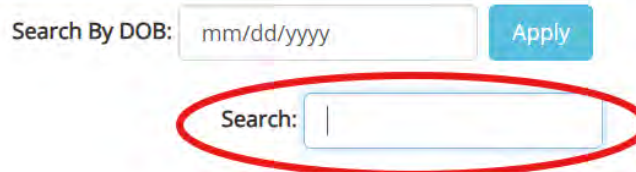
2 WAYS TO ACCESS ASSISTANCE REQUESTS

Either option gives you the Neighbor's contact information and any assistance request notes provided by the Help Desk.


ONE: Open the Help Desk email from *no-reply@servware.com* and select View Assistance Request. This will take you to the request with the name and contact information and any request notes.

TWO:

1. Open ServWare and find your neighbor by entering the name in the Search box.



2. Open the file folder under History (far right).

	Last Name	First Name	Street Address	Home Phone	Mobile Phone	DOB	Zip	History
Edit	Five	Testy	123 Cardinals Way		(987) 655-412_	01/01/1999	12345	

3. Select VIEW next to the request date. This will take you to the request with the name and contact information and any request notes.

	Request Date	Status	Ref To Conf
View	07/25/2025	Open	
AB- Child twin (air mattress) limit 2: \$0.00 Date Provided: 07/25/2025			
Utilities - Citizens Gas: \$500.00 Date Provided: 07/25/2025			

2 WAYS TO SEND REFERRAL FORMS TO NEIGHBOR SERVICES.


_ONE: (Through September 30, 2025.) Attach a file (Referral Form) to the request in ServWare.

Open ServWare after contacting the neighbor and have a completed Referral Form. Find your neighbor by entering the name in the Search box.

Search By DOB: [Apply](#)

Search:

Open the file folder under History (far right).

	Last Name	First Name	Street Address	Home Phone	Mobile Phone	DOB	Zip	History
Edit New Request	Five	Testy	123 Cardinals Way		(987) 655-412_	01/01/1999	12345	

Select VIEW next to the request date.

	Request Date	Status	Ref To Conf
View	07/25/2025	Open	
AB- Child twin (air mattress) limit 2: \$0.00 Date Provided: 07/25/2025			
Utilities - Citizens Gas: \$500.00 Date Provided: 07/25/2025			

Select **Req File**, then select **Add File**.

General [*Household Members](#) [*Assistance](#) [*Req Files](#) [History](#)

	Description	File Name	Updated
Add File			
Edit		SW Help Desk.docx	07/25/2025

Attach your **Referral Form document**. Include the last name of the neighbor in the file name.

Attach File

*Description Testy - Referral Form

*File **Choose File** Testy - Referral Form.pdf

Select email icon in upper right corner to send the file to Neighbor Services at NeighborServices@svdpindy.org .



Enter **FILE ATTACHED** in the Custom Subject Line to let Neighbor Services know that a separate referral form is attached to this request.

Email Assistance Request

Select Specific Conference Members

* AdminUserC1, Test (neighborservices@svdpindy.org)

Select Role *Note: Individual recipients selected overrides a role selection*

-- Select --

☐ All Conference Members

Custom Subject Line

FILE ATTACHED

☐ Override Default Subject

Return **Home**

TWO: Create a Referral Form in ServWare to be accessed by Neighbor Services by entering assistance items in the Neighbor's Assistance Request.

Once you have accessed the Request use the dropdowns to enter Intake and Assigned To.

A screenshot of a web form for creating a request. The 'Intake' dropdown menu is highlighted with a red circle and contains the text 'AdminUserC1, Test'. Below it, the '*Status' dropdown is set to 'Open'. The '*Request Date' field shows '07/25/2025'. The 'Assigned To' dropdown is also highlighted with a red circle and shows '-- Select --'.

Check Visit Details Home box. SAVE.

A section titled 'Visit Details Home' containing a checked checkbox and a text input field with the number '1'.

Select Assistance at top of page. Now you are ready to enter Assistance Types.

A horizontal navigation bar with five tabs: 'General', '*Household Members', '*Assistance', '*Req Files', and 'History'. The '*Assistance' tab is highlighted with a red circle.

Select Add Assistance tab to enter assistance types. Select assistance type from the drop down and add any notes. Select Save+ if there are additional items to add, otherwise select Save.

A blue button labeled 'Add Assistance Item' is followed by a dropdown menu labeled '*Assistance Type' which currently shows '-- Select --'.

Print (if needed)

Select print icon in upper right-hand corner and **“uncheck” history box** at top of page, then select print icon to print request. Then select back arrow

A row of action buttons: a refresh icon, a print icon (highlighted with a red circle), an email icon, and a red 'Delete' button. Below this is a 'Sections:' section with checkboxes for 'Visit', 'Personal', 'Referral', 'Financial', 'Assistance' (all checked), and 'History' (unchecked and highlighted with a red circle).

Select email icon in upper right corner, and send Assistance Request (Referral Form) to Neighbor Services at NeighborServices@svdpindy.org



Check Visit Complete box on the General Page and Save.

☐ Visit Complete?

Return to Neighbors.

Entering assistance provided only by Conference (Utility or Rent)

There are 2 types of assistance that are typically provided only by the Conference...Rent & Utilities. These assistance types can also be found in the assistance drop-down when creating a request.

These request details can be entered for Conference use only and do not need to be sent to Neighbor Services.

Rent or Utility visits are treated just like other visits where assistance types are entered.

Utility

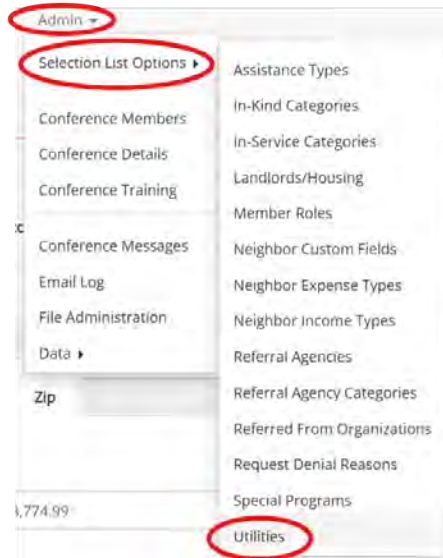
Select Utility Name from the assistance drop down. Enter Value, Date Provided, and any notes.

*Assistance Type	Utilities
Utility Name	Citizens Gas
Account	
Vendor name	Citizens Gas
City	
Provided By	-- Select --
*Value ⓘ	500
Date Provided ⓘ	07/25/2025

Here's how to set up a Utility Name so it will appear in the drop down for future use.

Adding local utility name to Utility Assistance Type.

Admin > Selection List Options > Utilities.



Select Add Utility. Enter Name, Address and check Active box. Save.

Utilities

Add Utility

Rent

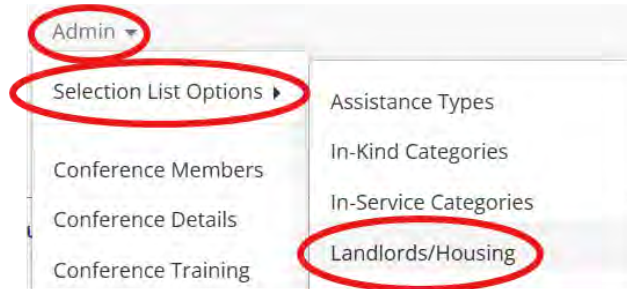
Select Rent Name from the assistance drop down. Enter Value, Date Provided, and any notes.

A screenshot of a form for adding a utility. The form has several fields: '*Assistance Type' with a dropdown menu showing 'Rent' (highlighted with a red circle), 'Landlord Name' (text input), 'City' (text input), 'Provided By' (dropdown menu showing '-- Select --'), '*Value' (text input with an information icon, highlighted with a red circle), and 'Date Provided' (text input with an information icon showing '08/28/2025', highlighted with a red circle).

Here's how to set up a Rent Name so it will appear in the drop down for future use.

Adding local utility name to Utility Assistance Type.

Admin > Selection List Options > Landlords/Housing >



Add Housing Entry. Enter Name, Address and check Active box. Save.

Landlord/Housing Information

Add Housing Entry

NOTE: If you don't want to formally set up Utility or Rent vendors to appear in the drop down for future use, a Payee name can be entered in the Payee Name box for each Assistance Request entered.

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