**Instructions for SMS**

Go to **sms.svdpsa.org**

1. Login
2. Search by DOB
3. Check SMS for client
4. If client has not received 2015 Project Cool Fan, go to **Main Menu­ 🡪 New Case Record**
   1. Create the Case Record and hit **submit**
   2. **Add a new head of household**
      1. First Name
      2. Last Name
      3. Date of Birth
      4. Gender
      5. Ethnicity
      6. Phone Number
      7. ID Type (If applicable)
         1. ID State
         2. ID Number
      8. Parishioner/Non-Parishioner (Only applies to SVDP)
      9. **Gray Box- most of the time will be Other**
      10. **Hit ADD MEMBER**
   3. **Select Next-Adding Address**
      1. Street Number
      2. Street Name
      3. City
      4. State
      5. Zip
      6. Apt # (If applicable)
      7. Inside/ Outside Boundaries (for SVDP)
   4. **Select Next- Add Initial Visit**
      1. Select Type of Visit
      2. Visit Date
      3. Case Worker
      4. **Hit Insert Record**
   5. **Add Assistance Item**
      1. Item- 2014 Project Cool Fan ($14)
      2. Qty 1
      3. Value: Automatically 14.00
      4. **Hit ADD**
   6. **Select Next- Adding Notes**
   7. **Finished- View Case File**