**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**