Rev 01-17-22

THESE INSTRUCTIONS ARE FOR FOOD DISTRIBUTION INTAKE for NEW and RETURNING FOOD CLIENTS ONLY (not for entering rent or utility assistance cases).

- **Login to CMS 4.0 "Expert Server Client"** from a web browser on desktops, laptops and iPads/pads at: https://houston.cmssvdp.org

You can save it as a bookmark or a favorite on you browser or create a desktop shortcut.

On the Home page:

When a RETURNING CLIENT comes into the food pantry:

- Click on: **Pantry Closeout** (under Main Menu Option). NOTE: If you don't see "Pantry Closeout", ask to be assigned the role "Pantry Clerk".
- Click on your location, IF NEEDED
- Click on [New Pantry Case]
- Complete the Client Profile with First and Last Name and click [Next] to go to the Client Identification tab
- If you see a Client match (you can check the address and DOB), click on that client
- then click on [Select] to go to "Client Identification – Existing Client" tab.

  NOTE: If the client is NOT a match, hit the [Back] button to search again.
  If the client's name is very popular, you can, also fill in DOB and Address when you first enter a name to help match the client

- On the "Client Identification – Existing Client" page, click on "Import Blanks from Current Client Record" (located in center of page)
- Make any changes/updates as needed (i.e. address change)
- Click on [Next] and review "Latest Client Information". If everything looks good, click on [Update] and then Confirm Action by clicking on [Yes]
- You will then be brought to the Household tab
- Review Household and make any changes, if needed. Then select [Next]
- On "Assistance" tab, under Resource:
  - select "Food"
  - In the [# assisted]
  -
  - field **enter # of persons** in household. NOTE: you don't fill out value anymore. That is done automatically once completed.
- Select [Complete] and then Confirm Action by clicking on [Yes]

When a NEW CLIENT comes to the food pantry for food only:

- Click on: Pantry Closeout (under Main Menu Option). NOTE: If you don't see "Pantry Closeout", ask to be assigned the role "Pantry Clerk".
- Click on [New Pantry Case]
- Complete the Client Profile with First and Last Name and click [Next] to go to the Client Identification tab
- If there is no Client match and this is a NEW client, then click on [NEXT] to go to "Client Identification – New Client" tab.
- Fill in as much of the information as you can, i.e. Gender, Marital Status, DOB, Ethnicity, Phone, Address and County

- Click on “Create Client”
- Fill in the Household information and include at least First and Last Name, DOB, Gender, Relationship and Ethnicity. Then select [Next]
- On “Assistance” tab, confirm the date and then under Resource:
  - select “Food”
  - In the # of Items field **enter # of persons** in household. NOTE: you don’t fill out value anymore. That is done automatically once completed.
- Select [Complete] and then Confirm Action by clicking on [Yes]

“Training” Conference log-in where you can play around to learn & become familiar with the new process: Go to same website but login using the following:

- Username: Prime1
- Password: svdp

CAUTION: Be sure to log out of the “Training” Conference and back into your own conference before you input actual visits.