

# ServicePoint Referral Network

## Sending a Referral

**Step 1:** Log into Lake County's live ServicePoint site at <https://lakecountyil.servicept.com> using your username and password.

**Step 2:** Click "**ClientPoint**" on the navigation bar on the left side of the screen. Search for the client by filling in the client's name, social security number and veteran status and clicking "**Search.**"

**Step 3:** Review the search results. If the client DOES exist, please select their name from the **Client Results** window at the bottom of the screen. If client does NOT exist, create new client by selecting the "**Add New Client with This Information**" button.

**Step 4:** You are now on the Client Summary for your client. Complete the data fields in the "**Referral Network Form**" towards the bottom of the page. Click "**Save**" in the bottom right corner.

**Step 5:** Select the "**Add**" button under the "**Outstanding Outgoing Referrals**" dashlet on the Summary Tab.

**Step 6:** Select the appropriate code on the Service Code Quicklist and click "**Add Terms.**"

**Step 7:** Scroll down to the provider search results and select ONE service provider for the referral by clicking the **plus sign** to the left of the provider name.

**PRO TIP:** THE PROVIDER YOU ARE SELECTING SHOULD HAVE A SERVICEPOINT LOGO  NEXT TO THE NAME.

**Step 8:** In the "**Referral Data**" section, check the box to notify ServicePoint providers by email.

**Step 9:** Click "**Save ALL**" at the bottom of the page.

*Congratulations your referral has been sent!*

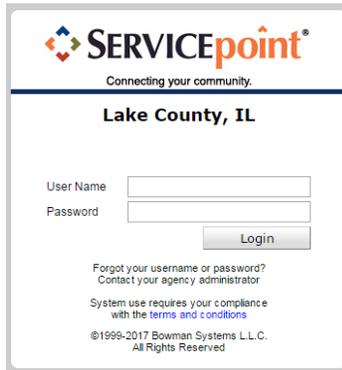




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## Sending a Referral

### Step 1:



**SERVICEpoint**  
Connecting your community.

Lake County, IL

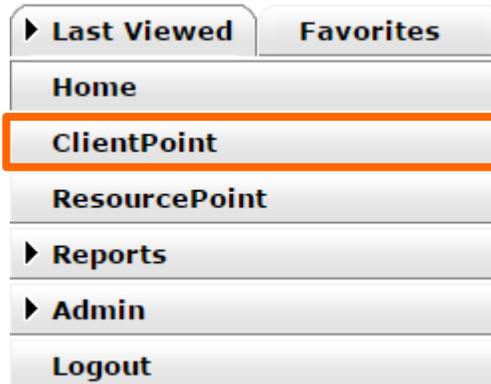
User Name   
Password

Forgot your username or password?  
Contact your agency administrator

System use requires your compliance  
with the [terms and conditions](#)

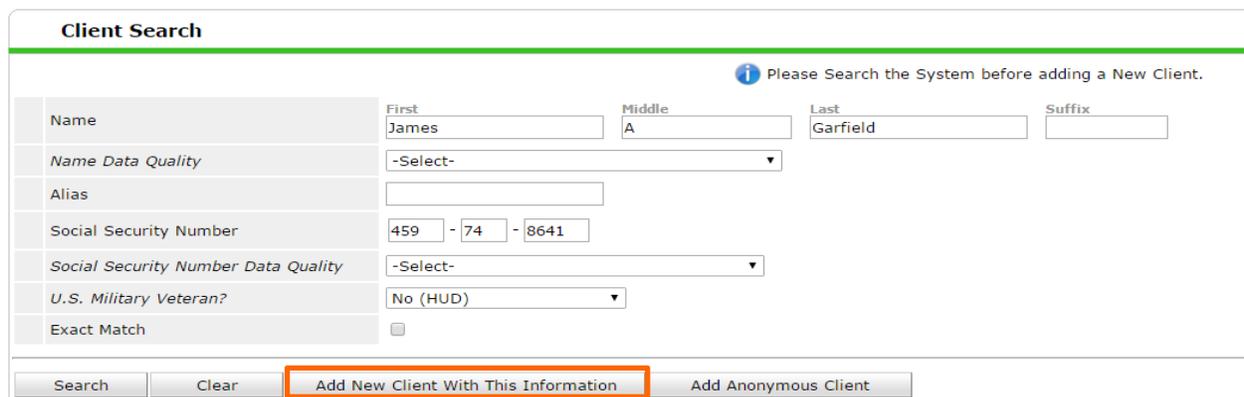
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### Step 2:



- Last Viewed
- Favorites
- Home
- ClientPoint**
- ResourcePoint
- Reports
- Admin
- Logout

### Step 3:

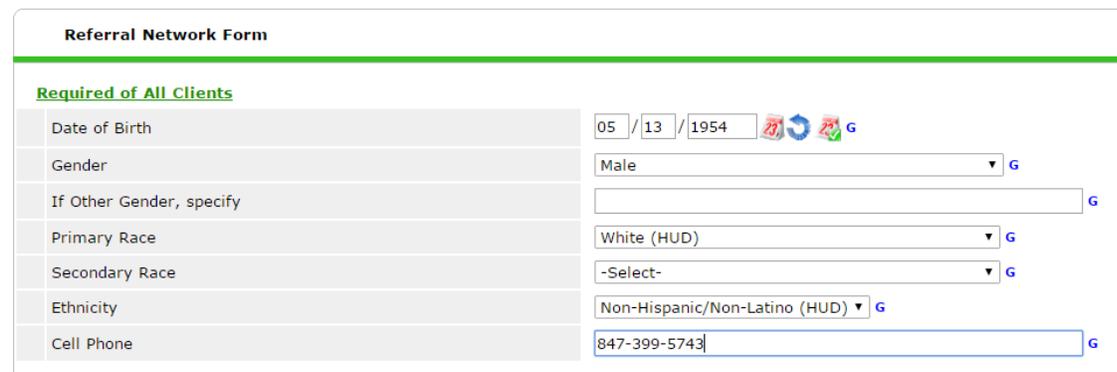


**Client Search**

Please Search the System before adding a New Client.

Name	First <input type="text" value="James"/>	Middle <input type="text" value="A"/>	Last <input type="text" value="Garfield"/>	Suffix <input type="text"/>	
Name Data Quality	<input type="text" value="-Select-"/>				
Alias	<input type="text"/>				
Social Security Number	<input type="text" value="459"/>	-	<input type="text" value="74"/>	-	<input type="text" value="8641"/>
Social Security Number Data Quality	<input type="text" value="-Select-"/>				
U.S. Military Veteran?	<input type="text" value="No (HUD)"/>				
Exact Match	<input type="checkbox"/>				

### Step 4:



**Referral Network Form**

**Required of All Clients**

Date of Birth	<input type="text" value="05"/> / <input type="text" value="13"/> / <input type="text" value="1954"/>	<input type="button" value="G"/>
Gender	<input type="text" value="Male"/>	<input type="button" value="G"/>
If Other Gender, specify	<input type="text"/>	<input type="button" value="G"/>
Primary Race	<input type="text" value="White (HUD)"/>	<input type="button" value="G"/>
Secondary Race	<input type="text" value="-Select-"/>	<input type="button" value="G"/>
Ethnicity	<input type="text" value="Non-Hispanic/Non-Latino (HUD)"/>	<input type="button" value="G"/>
Cell Phone	<input type="text" value="847-399-5743"/>	<input type="button" value="G"/>



**Step 5:**

Outstanding Outgoing Referrals		
Referral Date	Referred To Provider	Need Type
<input type="button" value="Add Referral"/>	No matches.	

**Step 6:**

Service Code Quicklist
Community Clinics (LN- 1500)

**Step 7:**

Search Results											
#	A	B	C	D	E	F	G	H	I	J	K
Provider											
<input type="checkbox"/>											
<input checked="" type="checkbox"/>											
<input checked="" type="checkbox"/>											
<input checked="" type="checkbox"/>											
<input checked="" type="checkbox"/>											
<input checked="" type="checkbox"/>											

**Step 8:**

Referral Data	
Needs Referral Date *	06 / 14 / 2017 <input type="button" value="23"/> <input type="button" value="23"/> <input type="button" value="23"/> 10 : 41 : 49 AM
Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="button" value="23"/> <input type="button" value="23"/> <input type="button" value="23"/>
Follow Up User	Mano A Mano- Information & Referral (2393) <input type="button" value="-Select-"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/> <a href="#">Check to notify ServicePoint Providers by Email.</a>

**Step 9:**

*Congratulations your referral has been sent!*

