

WellMed Referral LeadingReach - Quick Tips

Purpose: Assist Catalyst Health Network members in sending a WellMed referral through LeadingReach.

Workflow:

[Sending Referrals - No LR Sync 1.pdf](#)

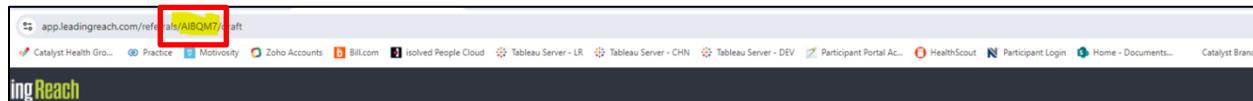
[Sending Referrals - With LR Sync 1.pdf](#)

NOTE: It is not necessary to link your existing LeadingReach account to the Zephyr portal at this time.

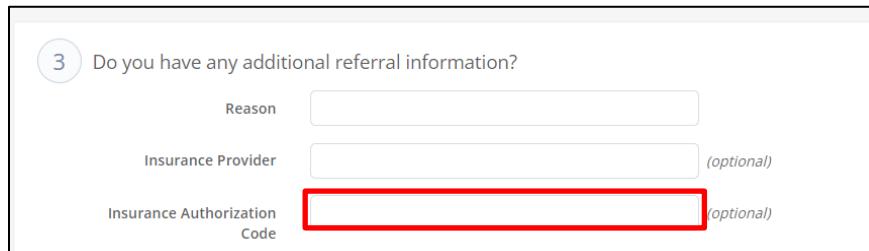
DIRECT MESSAGE/ATHENA INTEGRATION

If you currently utilize direct message or the athena integration to send referrals to LeadingReach:

The practice can place the referral ID in the LR referral as follows **prior** to sending if they create/save as a draft. On the draft referrals you can find that referral ID up in the url pictured here:



To transmit that ID with the referral place that ID number in step 3 under the insurance authorization code section:



3 Do you have any additional referral information?

Reason

Insurance Provider (optional)

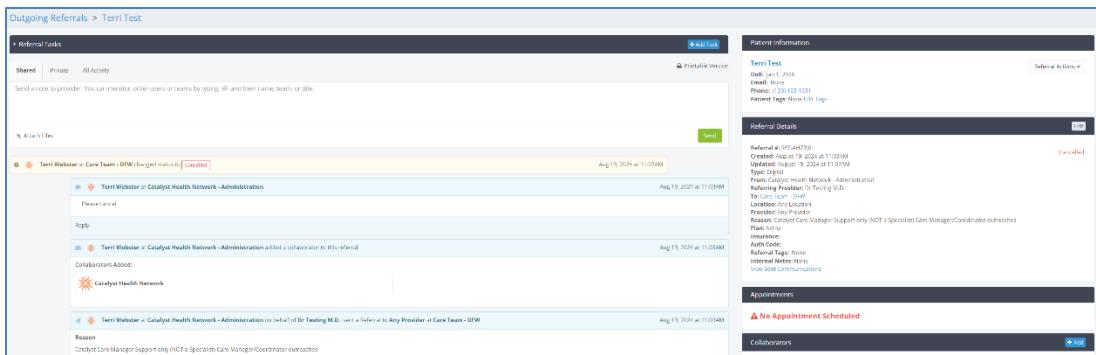
Insurance Authorization Code (optional)

NON-INTEGRATED/NON-DIRECT MESSAGE USERS

The practice will add in the referral ID generated to the Insurance Auth Code section under referral details in an existing referral once it is sent and note in the optional notes section that the referral ID serves as referral authorization number.

Referral Example

Date:	Completed by:	Description of edits:
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Outgoing Referrals > Terri Test

Referral Details

Shared | Private | All Activity

Send a note to provider. You can mention other users or teams by typing @ and their name, team, or role.

Attachment

Terri Webster or Care Team - DFW (Change status to Created)

Terri Webster or Catalyst Health Network - Administration

From: Catalyst Health Network - Administration

Referring Provider: Dr Testing M.D.

To: Care Team - DFW

Location: Any Location

Provider: Any Provider

Reason: Catalyst Care Manager Support only (NOT a Specialist) Care Manager/Coordinator outreaches

Plan: Aetna

Insurance:

Auth Code:

Referral Tags: None

Internal Notes: None

View Sent Communications

Patent Information

Terri Test

Date: Sat, Aug 19, 2024
Time: 11:03 AM
Provider: Dr Testing M.D.
Patient Tag: None (Edit Tag)

Referral Details

Referral #: REF-AHZRJ8
Created: August 19, 2024 at 11:03AM
Updated: August 19, 2024 at 11:07AM
Type: Digital
From: Catalyst Health Network - Administration
Referring Provider: Dr Testing M.D.
To: Care Team - DFW
Location: Any Location
Provider: Any Provider
Reason: Catalyst Care Manager Support only (NOT a Specialist) Care Manager/Coordinator outreaches
Plan: Aetna
Insurance:
Auth Code:
Referral Tags: None
Internal Notes: None
View Sent Communications

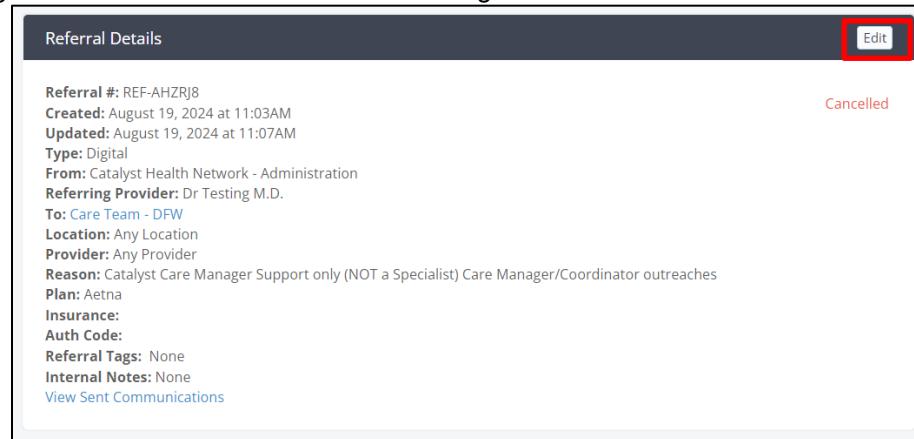
Appointments

No Appointment Scheduled

Collaborators

Cancelled

1. Navigate to the referral detail section on the right-hand side and click 'edit'.



Referral Details

Referral #: REF-AHZRJ8

Created: August 19, 2024 at 11:03AM

Updated: August 19, 2024 at 11:07AM

Type: Digital

From: Catalyst Health Network - Administration

Referring Provider: Dr Testing M.D.

To: Care Team - DFW

Location: Any Location

Provider: Any Provider

Reason: Catalyst Care Manager Support only (NOT a Specialist) Care Manager/Coordinator outreaches

Plan: Aetna

Insurance:

Auth Code:

Referral Tags: None

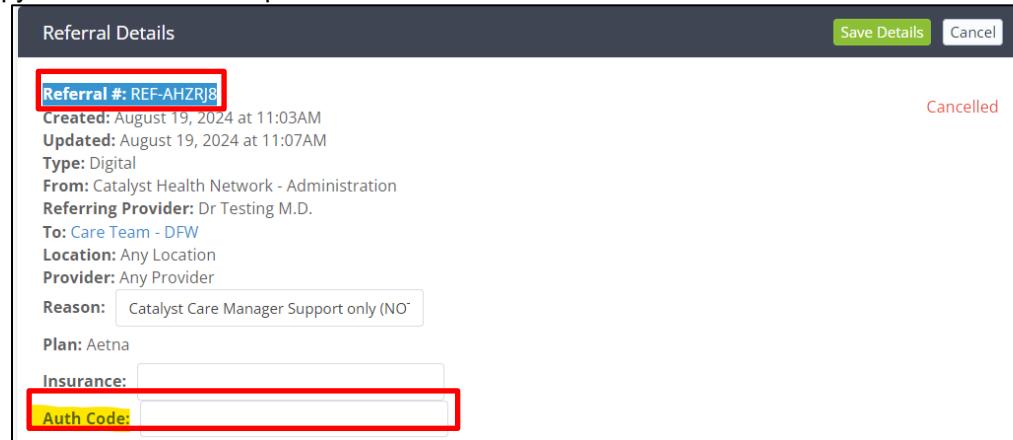
Internal Notes: None

View Sent Communications

Cancelled

Edit

2. Copy the "referral #" and paste it into the insurance auth code section.



Referral Details

Referral #: REF-AHZRJ8

Created: August 19, 2024 at 11:03AM

Updated: August 19, 2024 at 11:07AM

Type: Digital

From: Catalyst Health Network - Administration

Referring Provider: Dr Testing M.D.

To: Care Team - DFW

Location: Any Location

Provider: Any Provider

Reason: Catalyst Care Manager Support only (NOT a Specialist) Care Manager/Coordinator outreaches

Plan: Aetna

Insurance:

Auth Code:

Cancelled

Save Details | Cancel

3. Once you populate the field, click Save Details. The ID should populate.



Referral Details

Referral #: REF-AHZRJ8

Created: August 19, 2024 at 11:03AM

Updated: September 27, 2024 at 12:46PM

Type: Digital

From: Catalyst Health Network - Administration

Referring Provider: Dr Testing M.D.

To: Care Team - DFW

Location: Any Location

Provider: Any Provider

Reason: Catalyst Care Manager Support only (NOT a Specialist) Care Manager/Coordinator outreaches

Plan: Aetna

Auth Code: AHZRJ8

Referral Tags: None

Internal Notes: None

View Sent Communications

Cancelled

Date:	Completed by:	Description of edits: