

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](#)

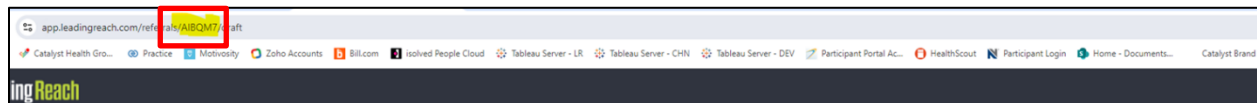
[Sending Referrals - With LR Sync 1.pdf](#)

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:



Outgoing Referrals > Terri Test

Referral Tasks

Shared Private All Activity

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

Attach Files

Terri Webster @ Care Team - DFW (changed status to Canceled) Aug 19, 2024 at 11:03AM

Terri Webster @ Catalyst Health Network - Administration Aug 19, 2024 at 11:03AM

Physician

Terri Webster @ Catalyst Health Network - Administration added a collaborator to this referral. Aug 19, 2024 at 11:03AM

Collaborators Added:

Catalyst Health Network

Terri Webster @ Catalyst Health Network - Administration on behalf of Dr. Testing M.D. sent a Referral to Any Provider @ Care Team - DFW Aug 19, 2024 at 11:03AM

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

Referral Information

Terri Test

Birth: Jan 1, 2016

Email: None

Phone: (720) 123 1231

Referral Page: None (Add Page)

Referral Details

Referral #: REF-AHZRJ8

Created: August 19, 2024 at 11:03AM

Updated: August 19, 2024 at 11:03AM

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

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

Referral Details

Edit

Cancelled

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

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

Referral Details

Save Details Cancel

Cancelled

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:

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

Referral Details

Edit

Cancelled

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

Insurance:

Auth Code: AHZRJ8

Referral Tags: None

Internal Notes: None

View Sent Communications

Date:	Completed by:	Description of edits:
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