



LeadingReach Training

The intention and purpose of using LeadingReach is to manage referrals in our payer networks and to decrease network leakage of out-of-network providers and services.

TABLE OF CONTENTS

Sending Specialist Referrals:

- LeadingReach Workflows – General Video
- LeadingReach Workflow – Training Document for Cloud-based EMRs..... 1
- LeadingReach Workflow – Training Document for Server-based EMRs..... 9
- LeadingReach Workflow – Sending a Centivo/BSW Training Document..... 16
- LeadingReach AthenaOne Integration Workflow – Training Document (Platform Members/CPG Only)..... 25

Sending Care Team Referrals:

- LeadingReach – Care Team/ Pharmacy Support Training Document 41
- LeadingReach – Care Team / Pharmacy Support Training Video

Sending Palliative Care Referrals:

- LeadingReach – Illumia/Palliative Care Training Document 46

How to Add a Fax Contact:

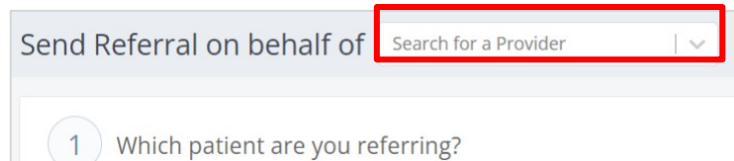
- LeadingReach – Adding a Fax Contact Training Document.....48
- LeadingReach – Adding a Fax Contact Training Video

LeadingReach FAQs.....50

Care Integration Platform

Sending Referrals

1. Click the **Send** button in the left menu bar.
2. Choose the Provider requesting the referral using the **Send Referral on behalf of** field – this is necessary for follow-up and data purposes.



Send Referral on behalf of Search for a Provider | v

1 Which patient are you referring?

Step: Searching for an existing patient or adding a New Patient

3. Search for the patient in the Patient Name field or click Add a New Patient and complete the required fields. If you add a new patient, the patient will save once you send the referral.



Send Referral on behalf of Catalyst Health Network - Administration Save Draft Send

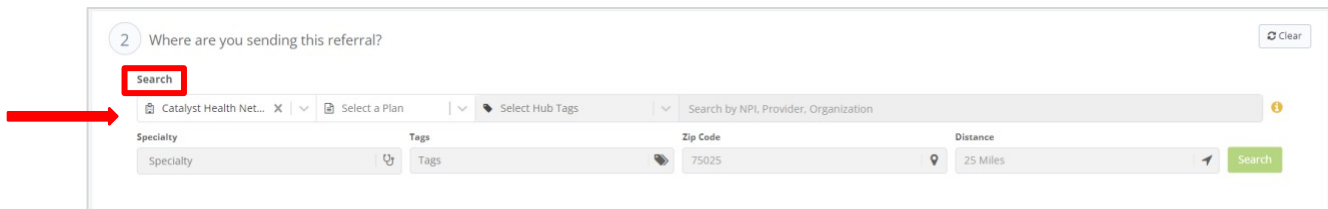
1 Which patient are you referring?
Select a patient by searching by name and/or date of birth, or add a new patient.

➔ Add a New Patient

Patient Name or MM/DD/YYYY Search Patients

Step: Plan and Provider Selection

4. Search for the referred to specialist.



2 Where are you sending this referral? Clear

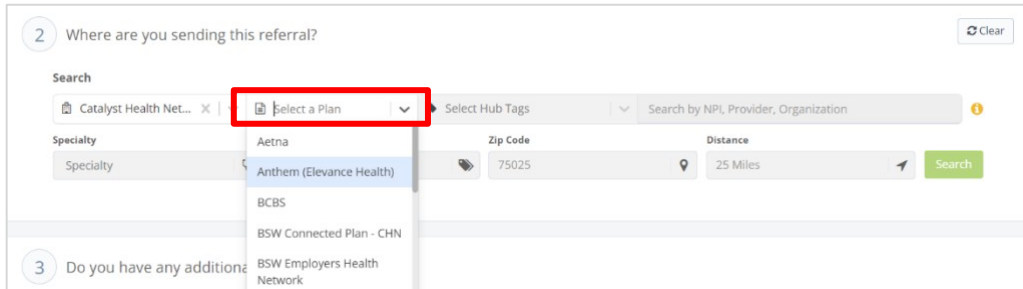
Search

Catalyst Health Net... X | Select a Plan | Select Hub Tags | Search by NPI, Provider, Organization

Specialty Tags Zip Code Distance

Specialty Tags 75025 25 Miles Search

5. Make sure that **Catalyst Health Network** is selected so that you can select the patient's plan from the drop-down list. Scroll through the list or **type the plan** name in this section.



2 Where are you sending this referral? Clear

Search

Catalyst Health Net... Select Hub Tags Search by NPI, Provider, Organization

Specialty Aetna Zip Code Distance

Specialty Anthem (Elevance Health) 75025 25 Miles Search

BCBS

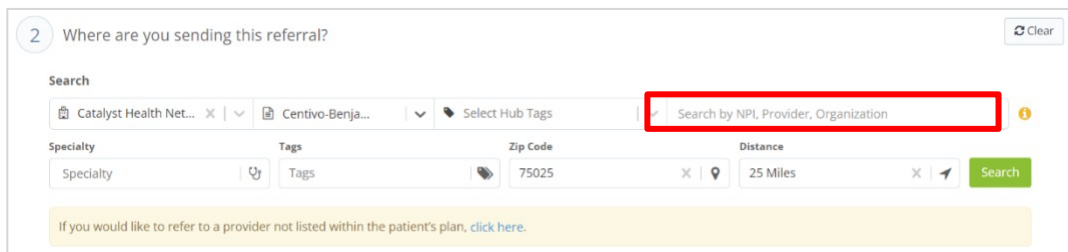
BSW Connected Plan - CHN

BSW Employers Health Network

3 Do you have any additional information?

6. Search and select for a provider. In the **“Search by NPI, Provider, Organization”** global search bar, type the information you would like to search by to find the specialist you are trying to refer to.

Note: If sending to the Catalyst Care Team, type **“Care Team”** in this box. If sending a pharmacy only referral, type **“Pharmacist Stellus Rx”**.



2 Where are you sending this referral? Clear

Search

Catalyst Health Net... Centivo-Benja... Select Hub Tags

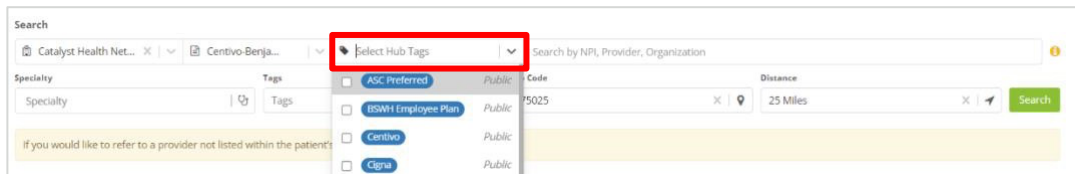
Specialty Tags Zip Code Distance

Specialty Tags 75025 25 Miles Search

If you would like to refer to a provider not listed within the patient's plan, [click here](#).

Options to refine your search via filters:

Select Hub Tag – Utilize the free text/drop-down option to refine your search based on tags loaded in the system by Catalyst. For example, ASC preferred provider tag.



Search

Catalyst Health Net... Centivo-Benja... Search by NPI, Provider, Organization

Specialty Tags Zip Code Distance

Specialty Tags 75025 25 Miles Search

ASC Preferred Public

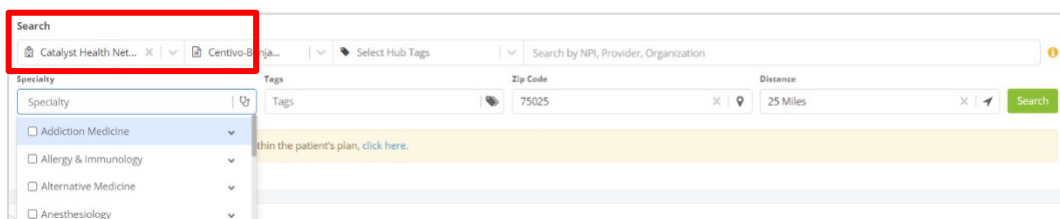
BSW1 Employee Plan Public

Centivo Public

Cigna Public

If you would like to refer to a provider not listed within the patient's plan, [click here](#).

Specialty: Utilize the free text/drop-down option to search to select one or more specific specialties.



Search

Catalyst Health Net... Centivo-Benja... Select Hub Tags Search by NPI, Provider, Organization

Specialty Tags Zip Code Distance

Specialty Tags 75025 25 Miles Search

Addiction Medicine

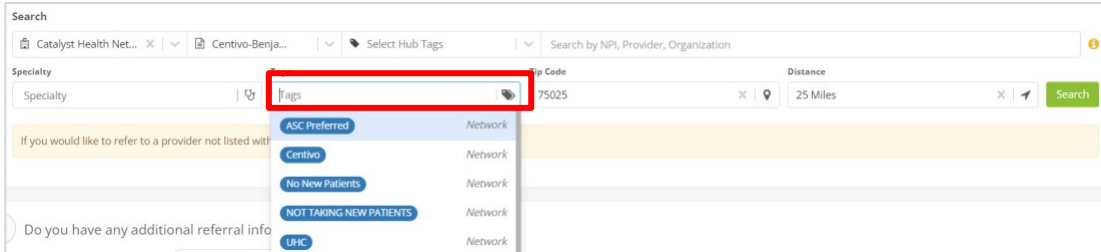
Allergy & Immunology

Alternative Medicine

Anesthesiology

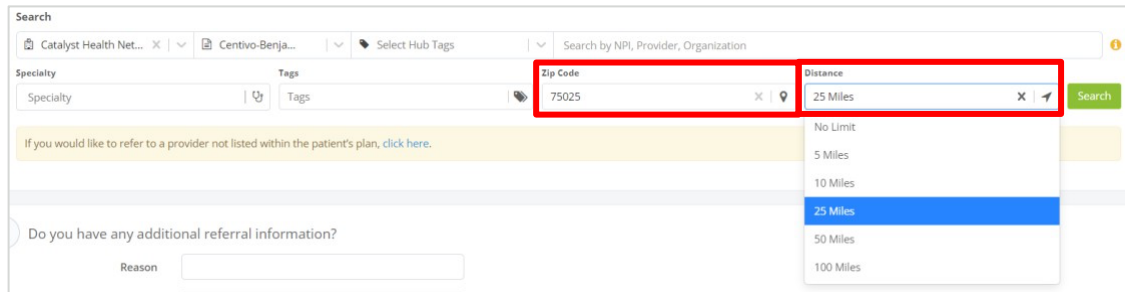
If you would like to refer to a provider not listed within the patient's plan, [click here](#).

Tags: Utilize the free text/drop-down option to refine your search based on tags loaded in the system by your organization. For example, ASC Preferred.

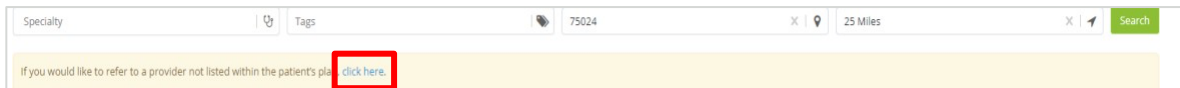


Zip Code & Distance: Utilize the free text field option to redefine your search based on zip code and/or the drop-down option for the distance filter.

- The zip code will default to the practice/patient zip code – this can be deleted or changed.
- The distance will default to 25 miles but may be deleted/changed by selecting one of the drop-down options.



7. You have the option to **opt out using the blue hyperlink** in the yellow helper text. If you are working with one of the plans highlighted, you **MUST** stay in network.



- If your referred to provider is not in LeadingReach, and in-network status has been verified - Utilize **“Digital Connection Not Available”** Opt Out Reason and select an available fax contact.
- If a fax contact is not available, please utilize this workflow: [Adding a fax.](#)

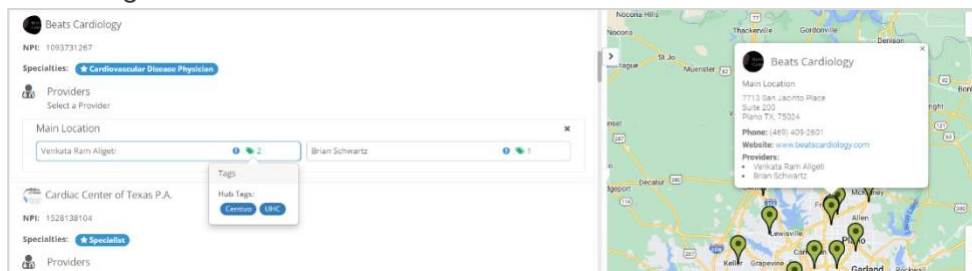
Stay in Network if working with one of the following plans:

- UHC
- Baylor Scott & White Plans
 - BSW Employers Health Network
 - BSW Employee Medical Plan
 - BSW Premier Plan – Aramark
 - BSW Premier Plan – PrismElectric
 - BSW Connected Plan – CHN
 - BSW DFW CareConnected/American Airlines
- Centivo Plans
 - Centivo – Benjamin Moore
 - Centivo – Nebraska Furniture Mart
 - Centivo – AT&T
 - Centivo – Kohls
 - Centivo – EnsignGroup
- Healthcare Highways
- WellMed

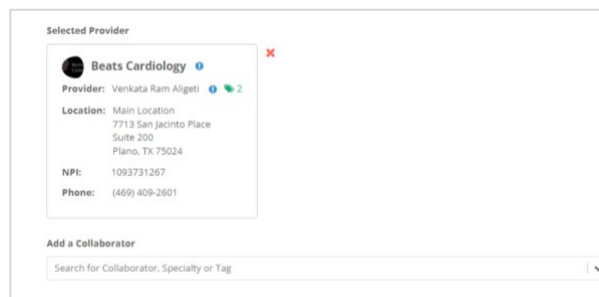
If you are sending a referral for any Centivo plan, DFW Connected Care/American Airlines, or any Baylor Scott and White plan, please follow the workflow linked here: [Centivo/BSW Job Aid](#)

8. Complete provider search once search criteria is entered.

- Search results will appear with organization/provider information on the left and a map view on the right.


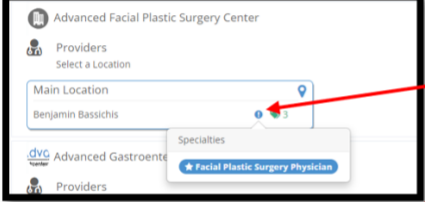
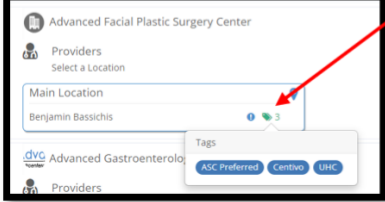


- To select a provider, click on the provider's name. (Final view of selected provider shown below)



New Result Search Features


NEW RESULT SEARCH FEATURES






If provider/org is grayed out the location/provider is not yet added to your network

Click "Add to my Network" to make available.

Hover over icons to reveal information.

- Exclamation reveals providers primary specialty.
- Green tags will list all internal provider/network tags.
- Clicking on the location symbol  will provide detailed information on the map view of the location.




Step: Additional Information

Fill out every box in section #3. Although LeadingReach states that the insurance boxes are optional, please still fill in the insurance provider box. If a prior auth is needed, put the referral authorization number in the "Insurance Authorization Code" box.

3 Do you have any additional referral information?


Reason

 Insurance Provider

Insurance Authorization Code

Tags

Optional Notes

 Attach Files



9. In the “Reason” box, fill in the diagnosis and/or diagnosis code.

**** If you are sending to the Catalyst Care Team, select a reason from the dropdown menu. These options are specific to the care team.**

3 Do you have any additional referral information?

Reason **None -**

- Catalyst Social Worker
- Care Manager Support
- Comprehensive Care Support
- Other

Insurance Provider (optional)

Insurance Authorization Code (optional)

****If sending a pharmacy support only referral to Stellus Rx, select a pharmacy support from the dropdown menu.**

3 Do you have any additional referral information?

Reason **None -**

- Pharmacy Support
- Other

Insurance Provider (optional)

10. In the Insurance Provider box, add the insurance specifics such as payer, plan type (HMO, PPO, etc.), and member ID if available.
11. If a prior authorization is required, enter the code in the “insurance authorization code box”.
12. Fill in any optional notes if applicable.
13. Attach the following files in PDF format or utilize Leading Reach Sync (cloud based EMRs only)df: **last visit notes, medication list, patient demographics, supporting labs and imaging, a copy of the patient’s insurance card.**

3 Do you have any additional referral information?

9 Reason

10 Insurance Provider (optional)

11 Insurance Authorization Code (optional)

Tags

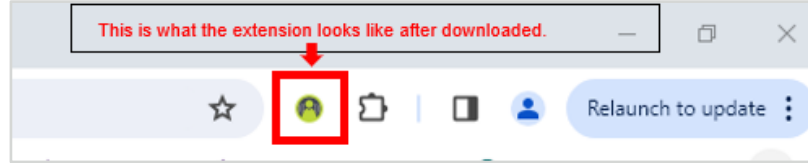
12 Optional Notes

13

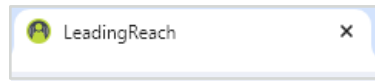
Use LR Sync for this part.



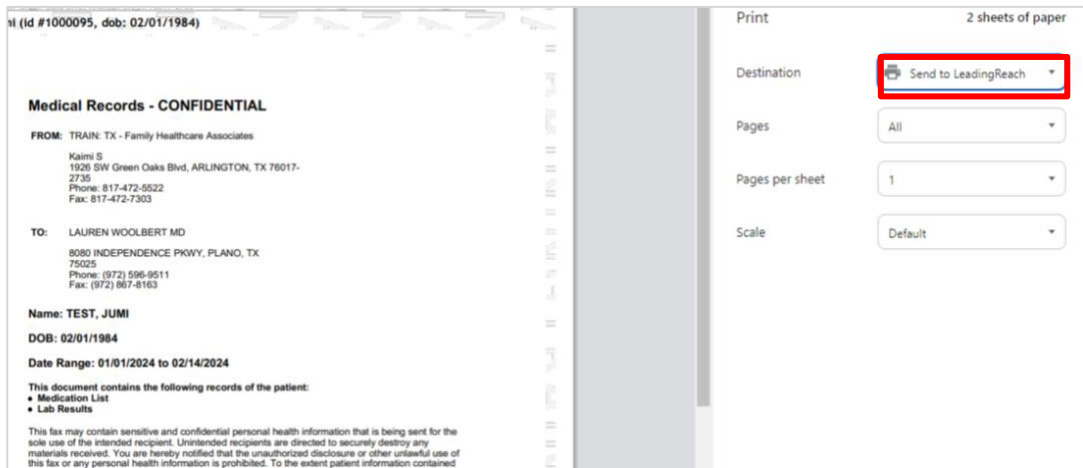
- 14. To utilize LR Sync, you must have the chrome extension downloaded. If you do not have the extension, click [this link](#) to download it. *For details on how to use the extension, click [here](#).



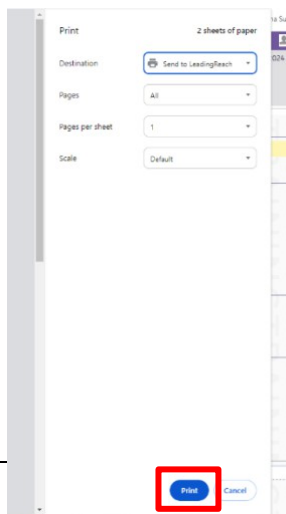
- 15. Before you gather the documents, have only one LeadingReach tab open with the referral you have created. The open LeadingReach tab is where the attachments will populate.



- 16. Within your EMR, you will open the necessary documents to attach as if you were going to print them. The destination needs to say, "Send to LeadingReach".



- 17. Click "print".





18. Once click **print**, you will see the documents auto-populate into the “Attach Files” section at the bottom of the “Additional Referral Information” box. ****You will not be able to preview the uploaded document unless you save it as a draft.**

3 Do you have any additional referral information?

Reason

Insurance Provider (optional)

Insurance Authorization Code (optional)

Tags

Optional Notes
Any other information the specialist/care team should know

If referring to one of the following specialties, you must include the tag “**Focus Specialty**”: **orthopedics, oncology, cardiology, nephrology, neurology, pulmonology, gastroenterology, endocrinology, or any urgent referral.**

** If this tag is missing or Catalyst Health Network is not collaborated on the referral, you will be responsible for all follow up.

3 Do you have any additional referral information?

Reason

Insurance Provider (optional)

Insurance Authorization Code (optional)

Tags

Optional Notes
Any Other information the specialist/care team should know

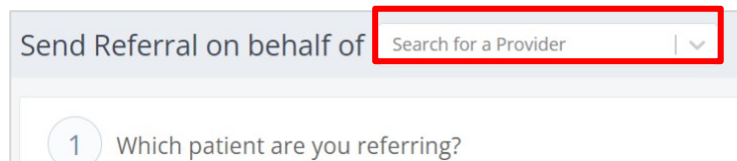
19. Select a time option and send.

Normal Time-sensitive Urgent

Care Integration Platform

Sending Referrals

1. Click the **Send** button in the left menu bar.
2. Choose the Provider requesting the referral using the **Send Referral on behalf of** field – this is necessary for follow-up and data purposes.

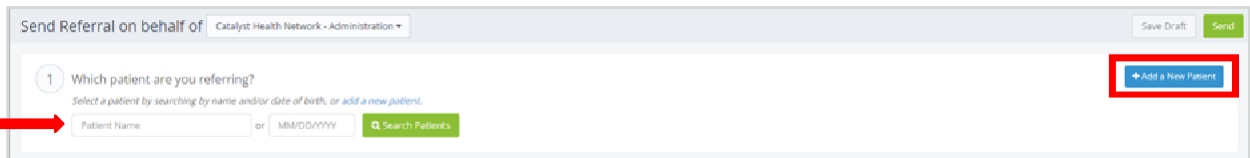


Send Referral on behalf of Search for a Provider | v

1 Which patient are you referring?

Step: Searching for an existing patient or adding a New Patient

3. Search for the patient in the Patient Name field or click Add a New Patient and complete the required fields. If you add a new patient, the patient will save once you send the referral.



Send Referral on behalf of Catalyst Health Network - Administration Save Draft Send

1 Which patient are you referring?

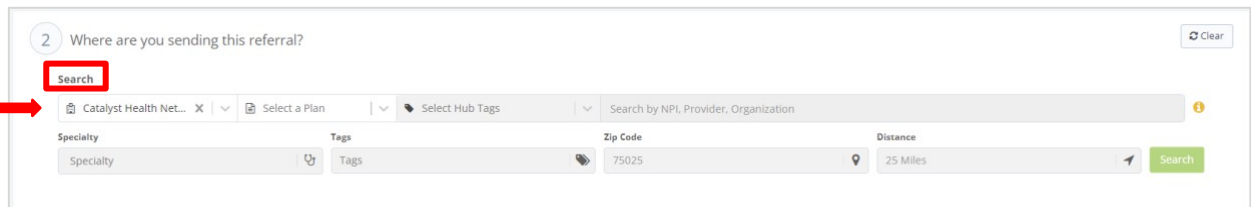
Select a patient by searching by name and/or date of birth, or add a new patient.

Patient Name or MM/DD/YYYY Search Patients

+ Add a New Patient

Step: Plan and Provider Selection

4. Search for the referred to specialist.



2 Where are you sending this referral? Clear

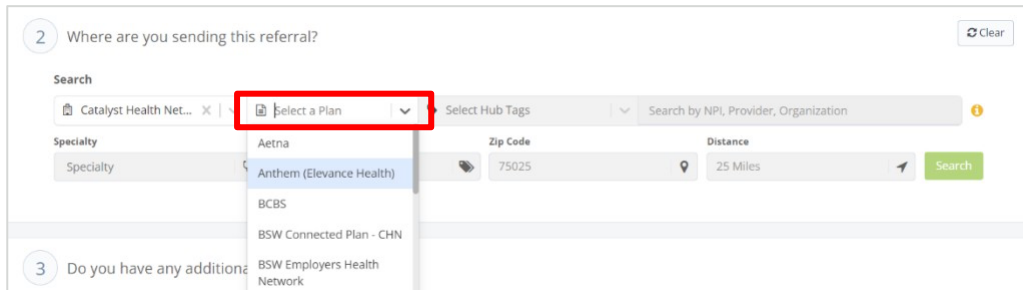
Search

Catalyst Health Net... X Select a Plan Select Hub Tags Search by NPI, Provider, Organization

Specialty Tags Zip Code Distance

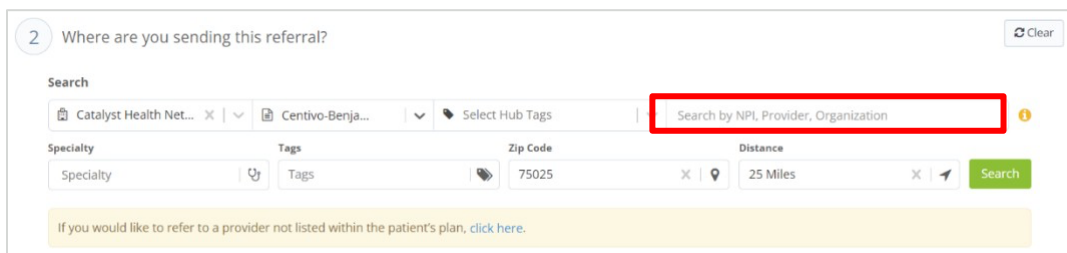
Specialty Tags 75025 25 Miles Search

5. Make sure that **Catalyst Health Network** is selected so that you can select the patient's plan from the drop-down list. Scroll through the list or **type the plan** name in this section.



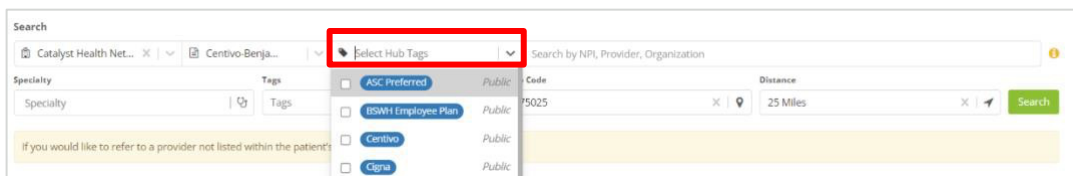
6. Search and select for a provider. In the **“Search by NPI, Provider, Organization”** global search bar, type the information you would like to search by to find the specialist you are trying to refer to.

Note: If sending to the Catalyst Care Team, type **“Care Team”** in this box. If sending a pharmacy only referral, type **“Pharmacist Stellus Rx”**.

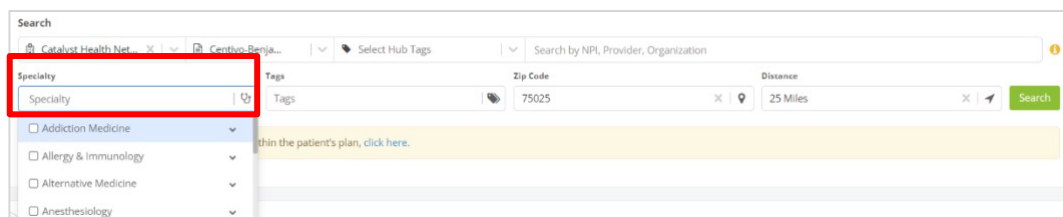


Options to refine your search via filters:

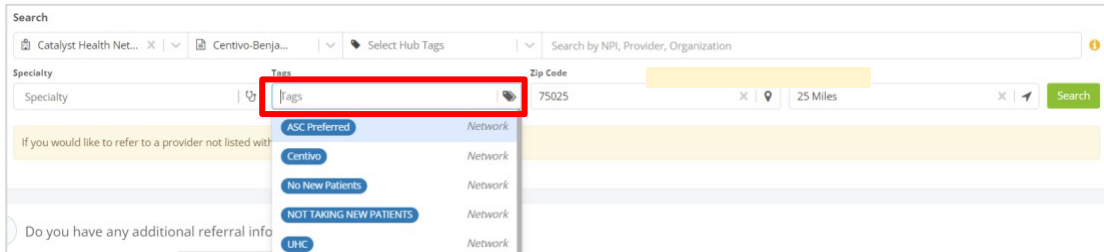
Select Hub Tag – Utilize the free text/drop-down option to refine your search based on tags loaded in the system by Catalyst. For example, ASC preferred provider tag.



Specialty: Utilize the free text/drop-down option to search to select one or more specific specialties.

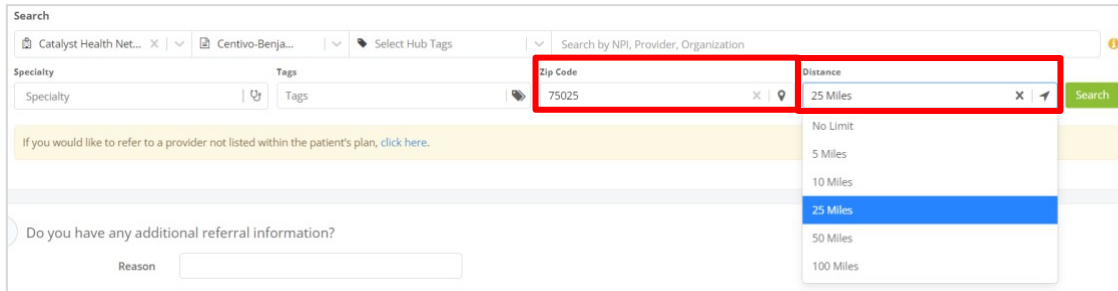


Tags: Utilize the free text/drop-down option to refine your search based on tags loaded in the system by your organization. For example, ASC Preferred.

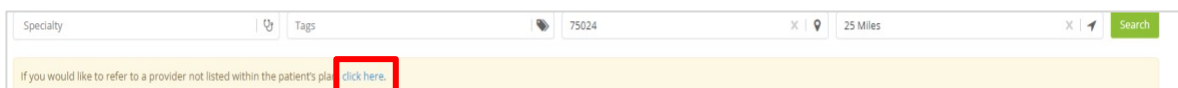


Zip Code & Distance: Utilize the free text field option to redefine your search based on zip code and/or the drop-down option for the distance filter.

- The zip code will default to the practice/patient zip code – this can be deleted or changed.
- The distance will default to 25 miles but may be deleted/changed by selecting one of the drop-down options.



7. You have the option to **opt out using the blue hyperlink** in the yellow helper text. If you are working with one of the plans highlighted, you **MUST** stay in network.



- If your referred to provider is not in LeadingReach, and in-network status has been verified - Utilize **“Digital Connection Not Available”** Opt Out Reason and select an available fax contact.
- If a fax contact is not available, please utilize this workflow: [Add a fax.](#)

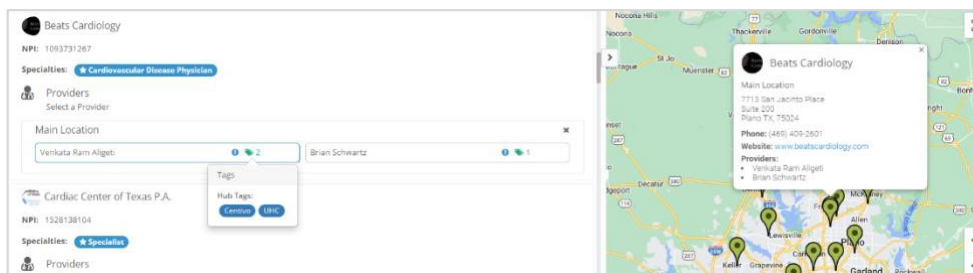
Stay in Network if working with one of the following plans:

- UHC
- Baylor Scott & White Plans
 - BSW Employers Health Network
 - BSW Employee Medical Plan
 - BSW Premier Plan – Aramark
 - BSW Premier Plan – PrismElectric
 - BSW Connected Plan – CHN
 - BSW DFW CareConnected/American Airlines
- Centivo Plans
 - Centivo – Benjamin Moore
 - Centivo – Nebraska Furniture Mart
 - Centivo – AT&T
 - Centivo – Kohls
 - Centivo – EnsignGroup
- Healthcare Highways
- WellMed

If you are sending a referral for any Centivo plan, DFW Connected Care/American Airlines, or any Baylor Scott and White plan, please follow the workflow linked here: [Centivo/BSW Job Aid](#)

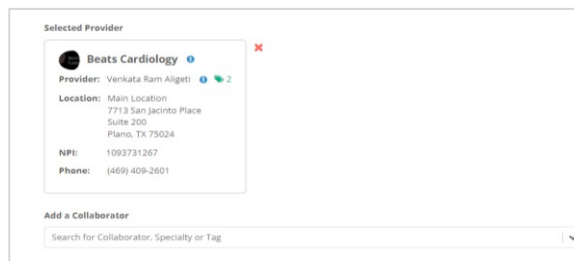
8. Complete provider search once search criteria is entered.

- Search results will appear with organization/provider information on the left and a map




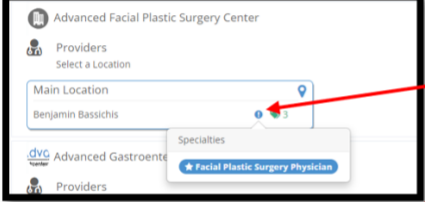
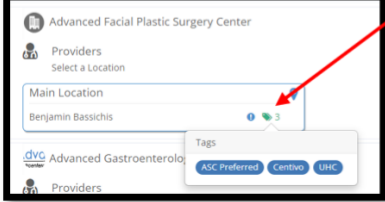
view on the right.

- To select a provider, click on the provider’s name. (Final view of selected provider shown below)



New Result Search Features


NEW RESULT SEARCH FEATURES






If provider/org is grayed out the location/provider it is not yet added to your network

Click "Add to my Network" to make available.

Hover over icons to reveal information.


- Exclamation reveals providers primary specialty.
- Green tags will list all internal provider/network tags.
- Clicking on the location symbol  will provide detailed information on the map view of the location.



Step: Additional Referral Information

Fill out every box in section #3. Although LeadingReach states that the insurance boxes are optional, please still fill in the insurance provider box. If a prior auth is needed, type the referral authorization number in the "Insurance Authorization Code" box.

3 Do you have any additional referral information?

Reason	<input type="text"/>
Insurance Provider	<input type="text"/>
Insurance Authorization Code	<input type="text"/>
Tags	Select... v
Optional Notes	<p>Send a note to provider. You can mention other users or teams by typing '@' and their name, team, or title.</p> <p> Attach Files</p>



9. In the “Reason” box, fill in the diagnosis and/or diagnosis code.
****If sending to the Catalyst Care Team, select a reason from the dropdown menu. These options are specific to the care team.**

- **If sending a pharmacy support only referral to Stellus Rx, select a pharmacy support from the dropdown menu.**

10. In the Insurance Provider box, add the insurance specifics such as payer, plan type (HMO, PPO, etc.), and member ID if available.
11. If a prior authorization is required, enter the referral auth code in the “insurance authorization code box”.
12. Fill in any optional notes if applicable.
13. Attach the following files in PDF format or utilize Leading Reach Sync (cloud based EMRs only): **last visit notes, medication list, patient demographics, recent supporting labs and imaging, a copy of the patient’s insurance card(s).**



If referring to one of the following specialties, you must include the tag “**Focus Specialty**”: **orthopedics, oncology, cardiology, nephrology, neurology, pulmonology, gastroenterology, endocrinology, or any urgent referral.**

** If this tag is missing or Catalyst Health Network is not collaborated on the referral, you will be responsible for all follow up.

3 Do you have any additional referral information?

Reason	<input type="text" value="dx, dx code"/>
Insurance Provider	<input type="text" value="Provider and Member ID"/> (optional)
Insurance Authorization Code	<input type="text" value="Prior Auth"/> (optional)
Tags	<input type="text" value="Focused Specialty"/> X v
Optional Notes	<div><p>Any Other information the specialist/care team should know</p><p>X Document 2024-02-14-733.pdf</p><p>Attach Files</p></div>

14. Select a time option and send.

Normal Time-sensitive Urgent



Care Integration Platform

Centivo/ All Baylor Scott & White Plans: Sending Referrals

If you have one of the following insurance cards, proceed using this job aid. Please refer to the New Employer Payer Plan Toolkit for additional information and insurance card examples. [New Employer Payer Plan Toolkit](#)

CENTIVO. Low Deductible Care Plan

MEMBER INFO
YOLANDA SAMPLE
Member ID: ATTSI900003

MEMBER COSTS
Primary Care: \$0 copay
Specialist: \$50 copay
Urgent Care: 10% coins, after ded.
ER: 10% coins, after ded.
Deductible: \$1,000 Ind/\$2,000 Fam. Not covered
Out-of-Pocket Max: \$5,000 Ind/\$10,000 Fam. Not covered
REMEMBER: Referrals from your Primary Care Team are required for most specialist care.

PLAN INFO
Group ID: ATTSI
Network: BSW

NETWORK INFO
CENTIVO. BSWPremier Network

CENTIVO. ADVANCE Medical Plan, sponsored by Benjamin Moore

MEMBER INFO
PAUL PIGMENT
Member ID: BENMR000003

MEMBER COSTS
Primary Care: FREE
Specialist: \$40 copay
Urgent Care: \$75 copay
ER: \$200 copay
Deductible: NONE
Out-of-Pocket Max: \$3,000/\$6,000
Out-of-Network: \$6,000/\$12,000
REMEMBER: Referrals from your Primary Care Team are required for most specialist care.

PLAN INFO
Group ID: BENMR
Network: BSW

NETWORK INFO
CENTIVO. BSWPremier Network

CENTIVO. Partnership Plan, sponsored by Your Employer

MEMBER INFO
CARLTON CARD-SAMPLE
Member ID: ENSGN000002

MEMBER COSTS
Primary Care: FREE
Specialist: \$50 copay
Urgent Care: \$75 copay
ER: \$500 copay
Deductible: \$1,000/\$2,000
Out-of-Pocket Max: \$4,000/\$8,000
Out-of-Network: Not covered
REMEMBER: Referrals from your Primary Care Team are required for most specialist care.

PLAN INFO
Group ID: ENSGN Rx PCN: CPT
Rx BIN: 023385
Network: CENTV Rx GRP: CPRX

NETWORK INFO
CENTIVO. BSWPremier Network

CENTIVO. High-Performance Plan Basic (Individual), sponsored by KOHL'S

MEMBER INFO
JONATHAN EXAMPLE-CARD
Member ID: KOHLS900022

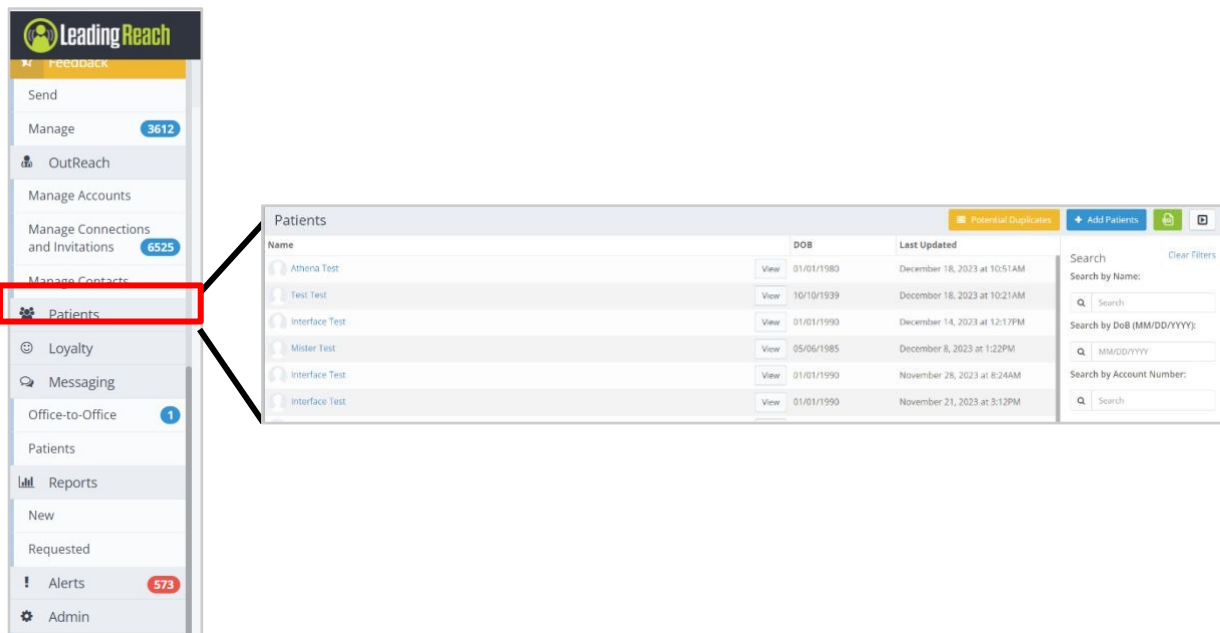
MEMBER COSTS
Primary Care: \$25 copay after ded.
Specialist: \$90 copay after ded.
Urgent Care: \$100 copay after ded.
ER: \$300 copay after ded.
Deductible: \$2,500
Out-of-Pocket Max: \$6,750
Out-of-Network: Not covered
REMEMBER: Referrals from your Primary Care Team are required for most specialist care.

PLAN INFO
Group ID: KOHLS
Network: BSW

NETWORK INFO
CENTIVO. BSWPremier Network

Prior to Sending the Referral

1. Click on **"Patients"** tab on the left-hand side of the screen.



2. Search for the patient.
 - Search by Name or DOB.

Search Clear Filters

Search by Name:

Search by DoB (MM/DD/YYYY):

Search by Account Number:

Filters

3. Click on the patient’s name.
 - If patient is not already in the system, first click **“Add Patients”**.

Patients			Potential Duplicates	+ Add Patients
Name	DOB	Last Updated		
Terri Test	View 01/01/2020	April 4, 2023 at 10:38AM		
Mister Test	View 05/06/1985	April 18, 2022 at 12:18PM		
Mister Test	View 05/06/1985	January 26, 2022 at 12:50PM		
Holly Yytest	View 10/06/1970	June 3, 2021 at 1:51PM		
Misty Test	View 01/01/2000	April 7, 2021 at 4:21PM		
TEST BABY Nebraska Furniture Mart	View 03/12/2019	March 9, 2021 at 9:42AM		
Collin Testing	View 10/23/1987	August 28, 2020 at 3:33PM		
test me Nebraska Furniture Mart	View 12/12/1961	August 27, 2020 at 3:22PM		
Rashida YY Test Nebraska Furniture Mart	View 01/08/1977	August 13, 2020 at 12:02PM		
Test Ashly	View 12/25/1988	March 16, 2020 at 9:26PM		
test test	View 03/03/2003	February 13, 2020 at 12:40PM		

- i. Add all information to each of the fields below: First & Last Name, DOB, Zip Code and Phone/Email

Add Patients Bulk Add

First Name

Last Name

Date of Birth

Zip Code

Phone

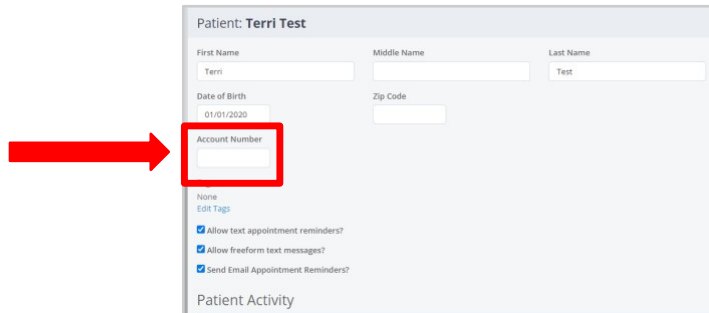
Email

Tags

Submit

- ii. Click Submit

4. Add the **Medical Record number** in the account number text box.
 - Navigate back to the patient selection screen click, patient's name.



Patient: **Terri Test**

First Name: Terri Middle Name: Last Name: Test

Date of Birth: 01/01/2020 Zip Code:

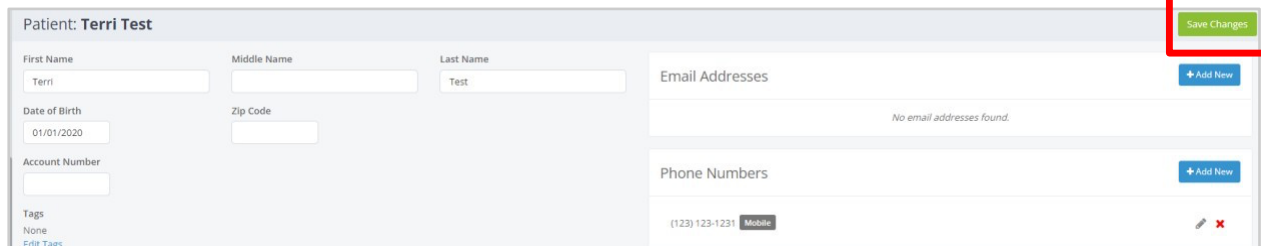
Account Number

None
Edit Tags

Allow text appointment reminders?
 Allow freemform text messages?
 Send Email Appointment Reminders?

Patient Activity

5. Click the green "Save Changes" button in the upper right-hand corner.



Patient: **Terri Test**

First Name: Terri Middle Name: Last Name: Test

Date of Birth: 01/01/2020 Zip Code:

Account Number:

Tags: None
[Edit Tags](#)

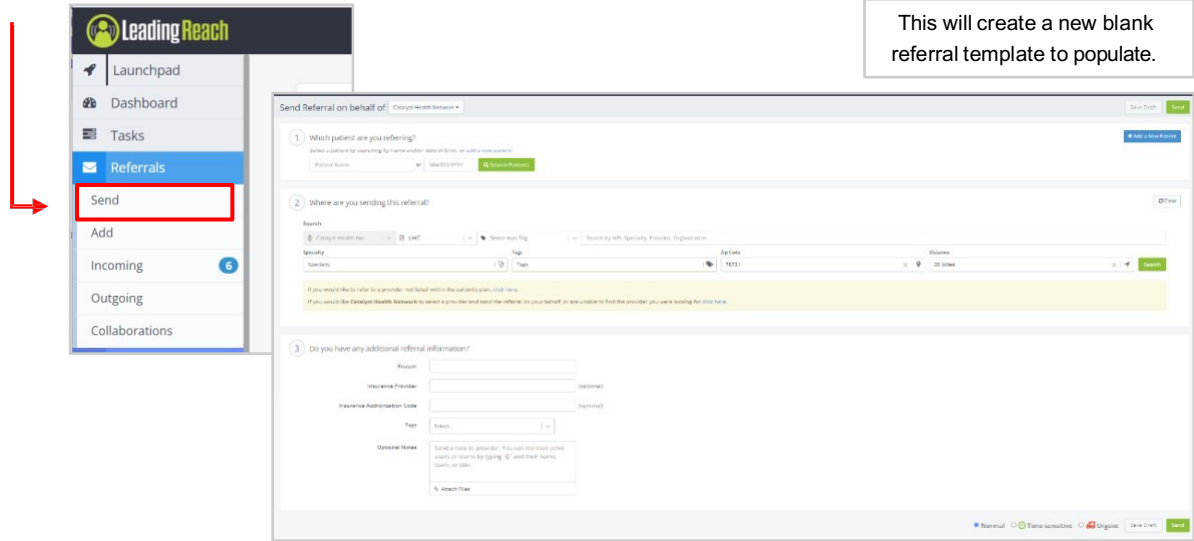
Email Addresses: [+ Add New](#)
No email addresses found.

Phone Numbers: [+ Add New](#)
(123) 123-1231 **Mobile** [✎](#) [✕](#)

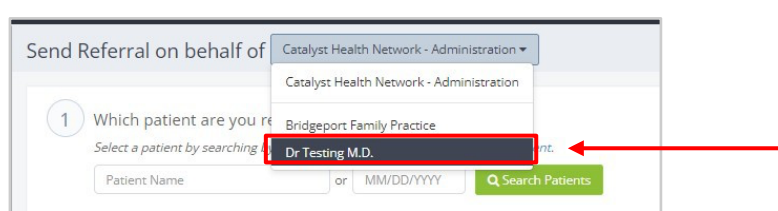
Save Changes

Sending the Referral

Step 1: Navigate to the **Send** Tab under the **Referrals** section in LeadingReach.



Step 2: Choose the Provider requesting the referral using the **“Send Referral on behalf of”** field – this is necessary for follow up and data purposes and to allow the referral to be sent.



LeadingReach Section #1: Searching for the Patient

1. Search for the patient by Name/Date of Birth in patient name/date field or click **“Add a New Patient”** and complete the appropriate fields.

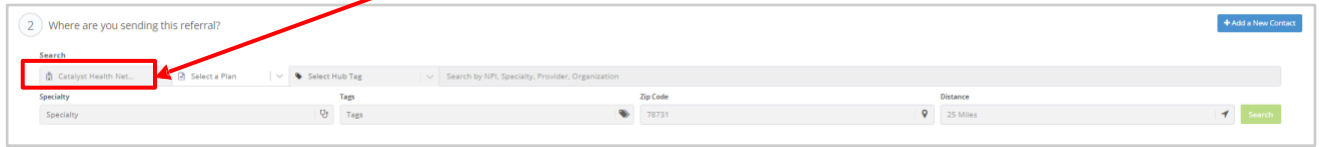


If you must add a new patient, they will save once you send the referral.

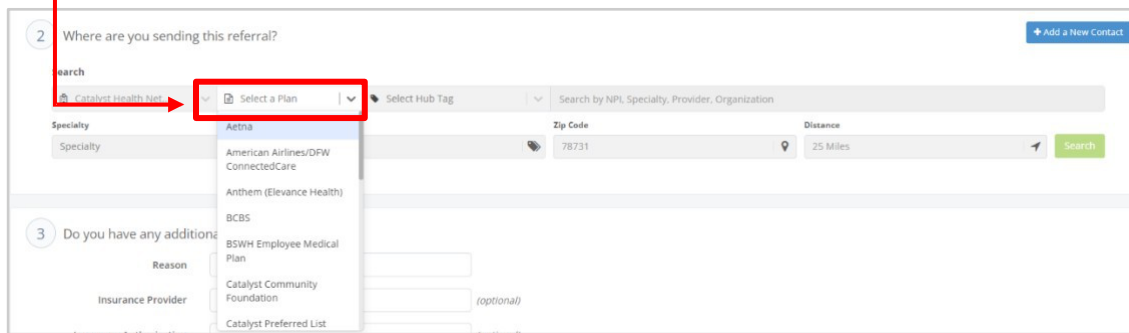
LeadingReach Section #2: Plan and Provider Selection

1. Search for the referred to specialist.

- First select **Catalyst Health Network** – this allows you to select plan options available.



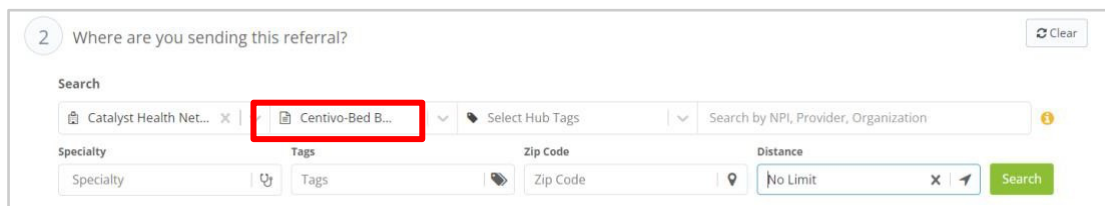
- Select the **patient's plan** from the drop-down list.
Scroll through the list or type the plan name in this section.



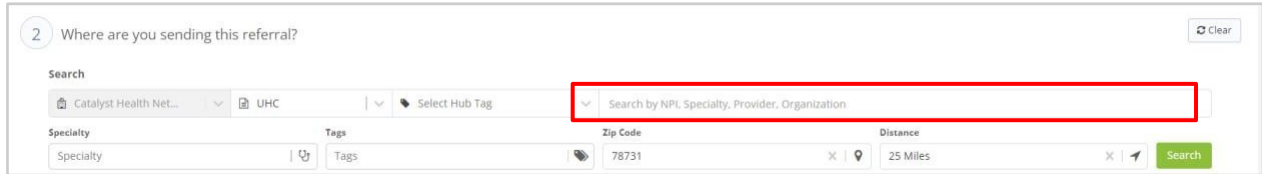
When searching for the patient's plan, it is imperative that you select the correct option, so choose the correct Centivo plan option from Benjamin Moore, AT&T, Kohls EnsignGroup, or Nebraska Furniture Mart or select the correct BSW plan option from BSW Connected Plan – CHN, BSW Employers Health Network, BSW Employee Medical Plan, BSW Premier Plan – Aramark, or BSW Premier Plan – PrismElectric.

2. Search and select for a provider.

You are **REQUIRED** to stay within the patient's plan as these plans have a narrow network. Opting out of the patient's plan will result in the referral being cancelled and therefore a delay in patient care. For this specific plan, the patient must see the provider selected on the referral. They are unable to change the provider once they receive authorization unless you start the process over again.

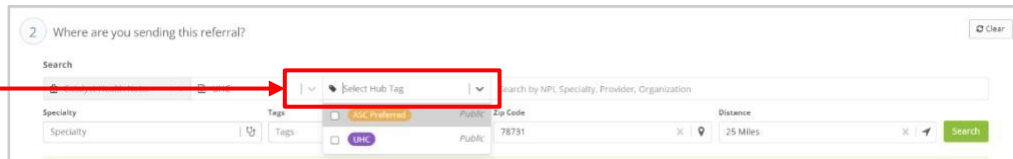


- In the “**Search by NPI, Specialty, Provider, Organization**” global search bar, type the information you would like to search by to find the specialist you are trying to refer to. (It is recommended to search by NPI first.)

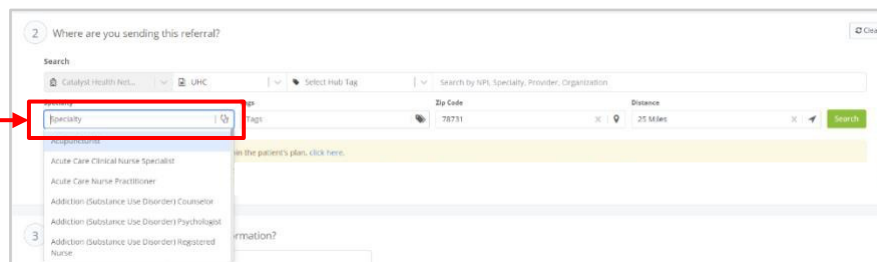


- Options to refine your search via filters:**

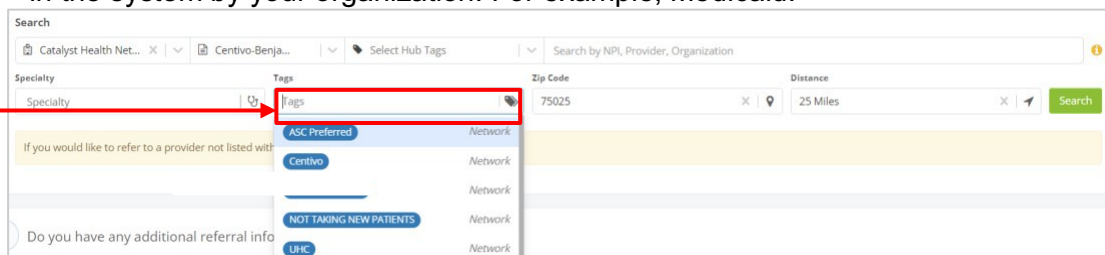
- Select Hub Tag:** Utilize the free text/drop-down option to refine your search based on tags loaded in the system by Catalyst. For example, ASC preferred provider tag.



- Specialty:** Utilize the free text/drop-down option to search to select one or more specific specialties.

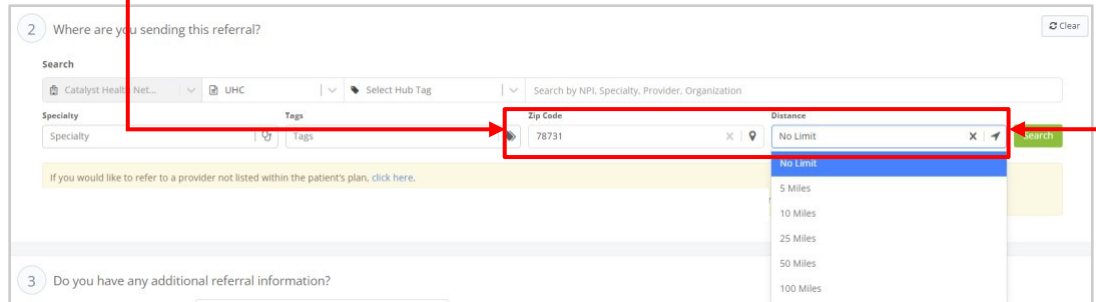


- Tags:** Utilize the free text/drop-down option to refine your search based on tags loaded in the system by your organization. For example, Medicaid.



- **Zip Code & Distance:** Utilize the free text field option to refine your search based

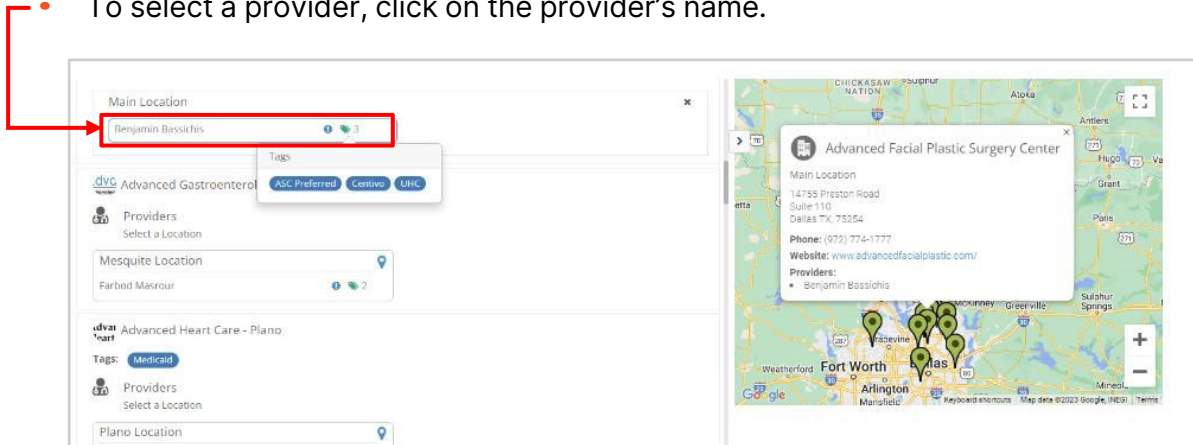
- The zip code will default to the practice/patient zip code – this can be deleted or changed.
- The distance will default to 25 miles but may be changed by selecting one of the drop-down options.



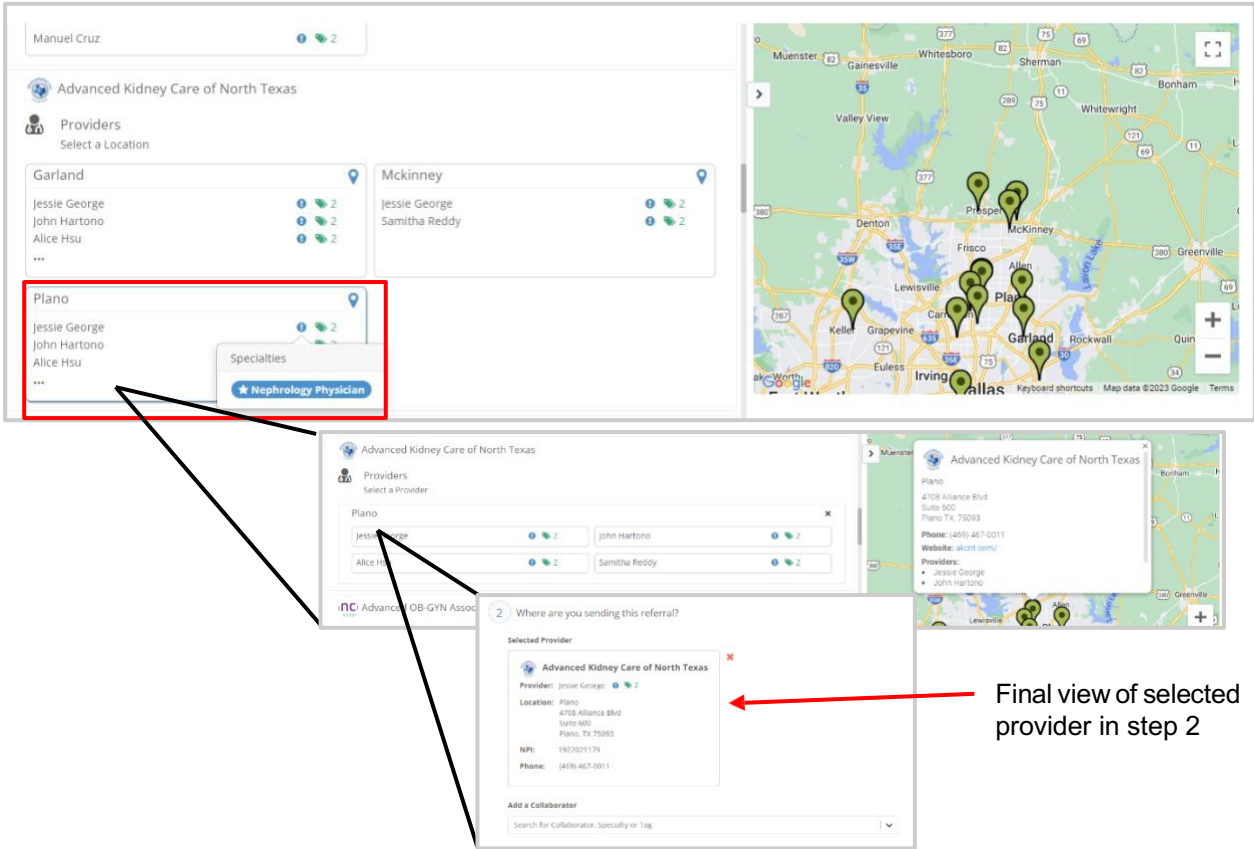
on zip code and/or the drop-down option for the distance filter.

4. Complete provider search once all search criteria entered.

- Search results will appear with organization/provider information on the left and a map view on the right.
- To select a provider, click on the provider’s name.

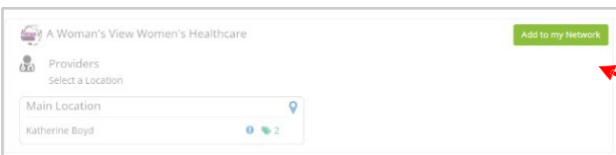


- If multiple locations exist, select the location first, then select the provider at that location.

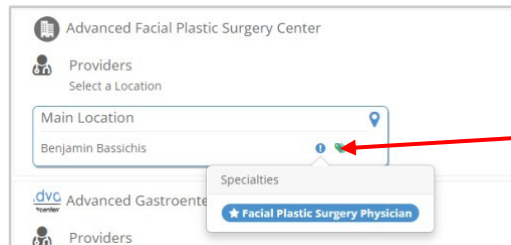


Final view of selected provider in step 2


NEW RESULT SEARCH FEATURES

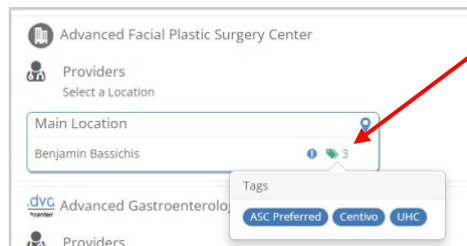


If provider/org is grayed out the location/provider it is not yet added to your network –
Click **“Add to my Network”** to make available.



Hover over icons to reveal information.

- Exclamation reveals providers primary specialty.
- Green tags will list all internal provider/network tags.
- Clicking on the location symbol  will provide detailed information on the map view of the location.

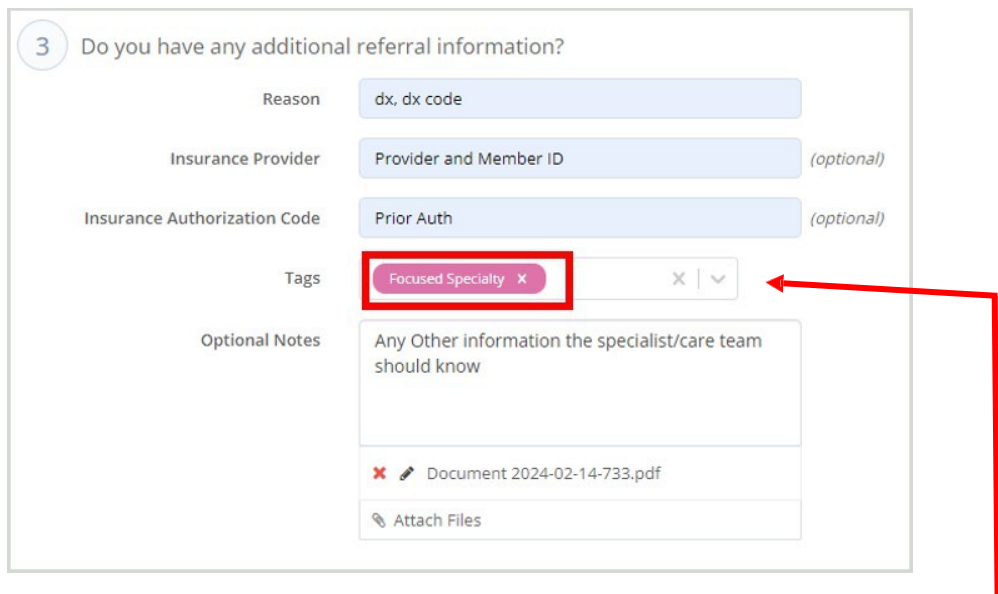


LeadingReach Section #3: Additional Information

Fill out **every** box in section #3. Although LeadingReach states that the insurance boxes are optional, this **MUST be filled out** in order for the patient to receive approval to see the referred to specialist.

6. Copy the Diagnosis and ICD 10 code(s) for the referral in the **Reason** field.
7. Enter the patient’s insurance carrier into the **Insurance Provider** field. Although this says optional, it should **always** be entered.
8. If an insurance authorization was attained, enter it in the **Insurance/Authorization Code** field.
9. Use the **Attach Files** button to attach the necessary referral documentation, such as: patient demographics/insurance information with card, progress notes, labs, medication lists, etc. All files must be in PDF format.

*If you have a browser based EMR - Utilize the LeadingReach Sync Chrome Extension to populate the referral order and all the attached documents (Facesheet, Medication List, Allergy List, most recent Encounter & Procedures/Patient Care Summary. In addition, add Lab(s)/Imaging Results when available.



3 Do you have any additional referral information?

Reason: dx, dx code

Insurance Provider: Provider and Member ID (optional)

Insurance Authorization Code: Prior Auth (optional)

Tags: Focused Specialty x [dropdown arrow]

Optional Notes: Any Other information the specialist/care team should know

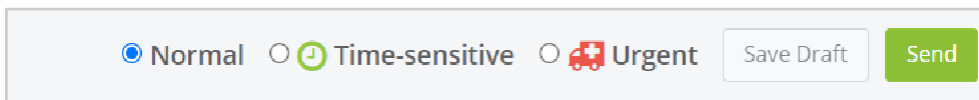
Document 2024-02-14-733.pdf

Attach Files

If referring to one of the following specialties, you must include the tag **“Focused Specialty”**: **orthopedics, oncology, cardiology, nephrology, neurology, pulmonology, gastroenterology, endocrinology, or any urgent referral.**

** If this tag is missing or Catalyst Health Network is not collaborated on referral, you will be responsible for all follow up.

10. Select a time option and click “send.”



Normal
 Time-sensitive
 Urgent



Sending Outgoing Referrals in Athena

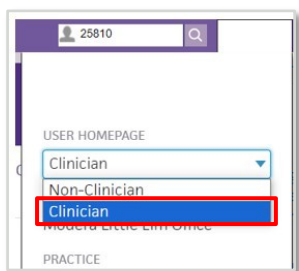
Purpose of Document: Provide workflow for the clinical user to process an outgoing referral from Athena into LeadingReach utilizing the (API) application programming interface.

To Start: Ensure you are on the **Clinician User Homepage** before sending referrals.

Step 1: Start by clicking on your username at the top right corner.

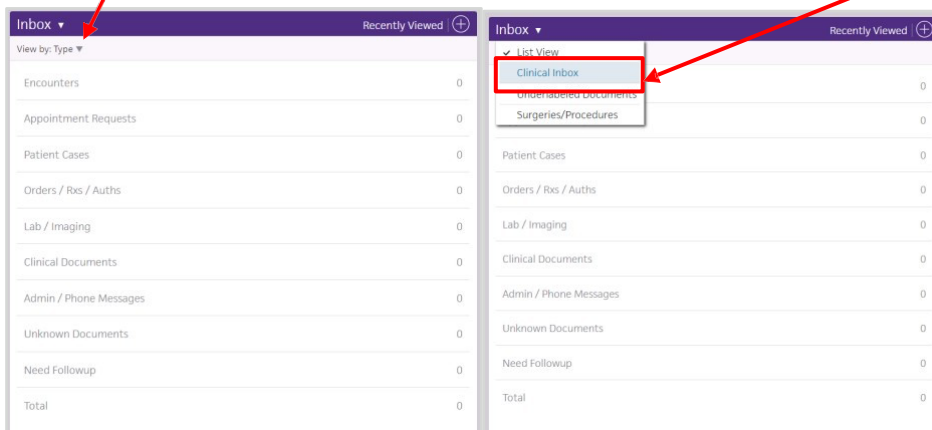


- A drop down will appear. Ensure you have **“Clinician”** selected.



Step 2: Setup your clinical inbox. Athena will default your view to a List View once you have selected **Clinician** in step one. You will change this to the Clinical Inbox view.

- Click on the ▾ next to Inbox to access the drop down and select **Clinical Inbox**



- This will change your view to allow you to see breakdown of items in your inbox and see items from oldest to newest once clicked.

Clinical Inbox ▾										Recently Viewed (+)
Assigned To	Encounters	Appointment Requests	Patient Cases	Orders / Rxs / Auths	Lab / Imaging	Clinical Documents	Admin / Phone Messages	Unknown Documents	Need Followup	Total
Referrals			2	16						18
Unconfigured User						3				3

Once orders are signed this will send the referrals that are routed to the referral practice role/clinical inbox. The order will be found under the **Orders/Rxs/Auths** section under the **referrals** clinical inbox.

Step 3: Ensure you can view the **referrals** clinical inbox.

- Click the “+” next to **Recently Viewed** near the Inbox.
 - This will expand a drop down to choose the user and roles you want to populate.

All users, staff, practice roles and athenahealth inboxes will default as selected.

Hover next to each ▷ button and the **CLEAR ALL** button will appear. Click here to clear all selections. Repeat for each section.

Step 4: Select the “**Referrals**” practice role (in addition to any other users/roles) to view all outgoing referrals and tasks assigned to this clinical inbox to be processed.

Step 5: Select the number(s) under “**Orders/Rxs/Auth**” to make all orders to be processed visible.

The image shows a screenshot of a 'Clinical Inbox' table. The table has several columns: 'Assigned To', 'Encounters', 'Appointment Requests', 'Patient Cases', 'Orders / Rxs / Auths', 'Lab / Imaging', 'Clinical Documents', 'Admin / Phone Messages', 'Linkout Documents', 'Based Followup', and 'Total'. The 'Assigned To' column shows 'Unconfigured User'. The 'Patient Cases' column has the value '2'. The 'Orders / Rxs / Auths' column has the value '16', which is circled in red. A callout box is drawn around this cell, showing a zoomed-in view of the 'Orders / Rxs / Auths' column header and the value '16', which is also highlighted with a red border. The 'Total' column shows the value '3'.

Assigned To	Encounters	Appointment Requests	Patient Cases	Orders / Rxs / Auths	Lab / Imaging	Clinical Documents	Admin / Phone Messages	Linkout Documents	Based Followup	Total
Unconfigured User			2	16		3				3

Orders / Rxs / Auths	Lab / Imaging
16	

Step 6: Orders to be processed will now be available below the clinical inbox and can be sorted in ascending/descending order based on the created date.

- Click on any of the referrals to open the referral and begin processing.

Assigned To	Encounters	Appointment Requests	Patient Cases	Orders / Rxs / Auths	Lab / Imaging	Clinical Documents	Admin / Phone Messages	Unknown Documents	Need Followup	Total
ATHENAFAX				125		20				145
referrals			3	112						115
Unconfigured User	1		9			6	1			17

Referral	Status	Description	Created
Test, Kortney 38yo F 09-07-1985 #1000008	SUBMIT	Consult Order psychiatrist referral Last Note: Authorized by candrews93 (cbrinlee, 09-08-2023)	09-08-2023
Test, Catoria 35yo F 01-30-1988 #1000010	SUBMIT	Consult Order psychiatrist referral Last Note: Authorized by candrews93 (skhomas25, 09-08-2023)	09-08-2023
Test, Angela 43yo F 01-01-1980 #1000011	SUBMIT	Consult Order psychiatrist referral Last Note: Authorized by candrews93 (asallinas81, 09-08-2023)	09-08-2023

Step 7: Referral coordinator(s)/staff to fill in referral information as indicated. (Orders will be in a SUBMIT status to the referral clinical inbox).

Amal TEST
#1148 F | 12-17-1986 | #1000019 | #1000019

pulmonologist referral in SUBMIT | referrals (created 09-12-2023 03:15 PM by amohammed82) #1148

Last Note: Task Assignment Override #88 Applied (ATHENA, 09-12-2023)

Referral status: Order signed

View ALL Orders in SUBMIT assigned to referrals

Print barcode labels for order results

Department: PHCA SW Green Oaks Clinic
Description: PULMONOLOGIST REFERRAL
Diagnosis: Asthma
ICD-10: J45.909 Unspecified asthma, uncomplicated
Decline:
Clinical Provider: Search
CC results: RECIPENT
Ordering Provider: CHER ANDREWS, DO NP 1437130438 Approved/Denied: Approved by Amal Mohammed 09/12/23
From Encounter: CHER ANDREWS, DO, Follow Up Visit - 35 89/12/2023 (OPEN)
Perform Date: 09-12-2023
Summary of Care Record: Send with order
Attachments: ATTACHMENTS

View via Description

pulmonologist referral in SUBMIT to referrals #1148 view actions

Save Save and Next Cancel

Step 8: Choose a Receiver – if the clinician has left this blank, choose a **Clinical Provider** by selecting the search link.

jest TEST
33yo F 08-02-1990 #25810

cardiologist referral in SUBMIT to referrals (created 08-07-2023 09:10 PM by sechob6)
#31188

Last Note: Task Assignment Override #88 Applied (ATHENA, 8:25 PM)

Referral status: Order signed

Print barcode labels for order results: [dropdown] PRINT

Department: Modera Prosper Office

Description: CARDIOLOGIST REFERRAL

Diagnosis: Chest pain

ICD-10: R07.9 Chest pain, unspecified

Decline: [dropdown]

Clinical Provider: [dropdown] **Search**

CC results: RECIPIENT

You can search for a provider by name or utilize the filters to narrow your search results.

Add a receiver for: cardiologist referral

Search receivers [input field] ★

1 filter | Clear Within 30 mi of 75024 | Speciality | Local Networks

Receiver	Location	Contact	Direct Addr
Modera Clinic Leading Reach Modera Preferred Specialist Frequently Used	2700 E Eldorado Pkwy Little Elm, TX 75068	P: (972) 974-8907 F: (877) 499-3573	
Andrew Binder Cardiovascular Disease Frequently Used	6601 PRESTON RD PLANO, TX 75024 7 more locations	P: (469) 800-6300 F: (469) 800-6351	
Zarina Sharalaya MD Interventional Cardiology Frequently Used	5575 FRISCO SQUARE BLVD, STE 240 FRISCO, TX 75034	P: (214) 361-3300 F: (214) 575-5774	
Kalpesh Patel MD Interventional Cardiology Frequently Used	5680 FRISCO SQUARE BLVD STE 2000, Ste 100 FRISCO, TX 75034 1 more location	P: (469) 440-2570 F: (214) 548-5667	

Description	PULMONOLOGIST REFERRAL	
Diagnosis	Asthma	
ICD-10	J45.909 Unspecified asthma, uncomplicated	
Decline	<input type="checkbox"/>	
Clinical Provider	Search	
CC results	RECIPIENT	
Ordering Provider	CHERI ANDREWS, DO NPI 1437110418	Approved/Denied Approved by Amal Mohammed 09/12/23
From Encounter	CHERI ANDREWS, DO, Follow Up Visit - 15 09/12/2023 (OPEN)	
Perform Date	09-12-2023	
Summary of Care Record	<input type="checkbox"/> Send with order	
Attachments	+ ATTACHMENTS	

If the "Send with Order" has been checked and is greyed out – click into the summary of care record and ensure it is in a CLOSED status.

Step 9: Uncheck the "Send with order" box next to Summary of Care Record.

Step 10: Check the internal note section to complete applicable requests. Add information to the "Note to provider" section as applicable.

cardiologist referral DECLINE X

Send: 08-07-2023 STAT Schedule within: provider's discretion

Alarm: 4 weeks 09-04-2023

Send to: Russell Fisher MD
1305 Airport Frwy, Bedford, TX 76021-6608
Ph: (817) 510-1060, Fax: (817) 510-9940

Documentation only
 Include summary of care record View

CC results: + RECIPIENT

Attachments: + ATTACHMENTS

Note to provider:

Internal note: Please send to Dr. Russell Fisher. If not please send to a provider in the UHC local network.

Step 11: Fill out the authorization section displayed below. Click “Edit Authorization”. Select “Not Required” or “Approved” and add all applicable fields if prior auth required. Click add auth to Quickview box.

Authorization and Insurance Referrals

of requested visits

Procedure code x

x +

Insurances

Primary: DGDF-TX [F20143] Member: 12345678
EDIT AUTHORIZATION

Secondary: Cigna [74] Member: A123456
EDIT AUTHORIZATION

Date of service:

Reason for Referral:

Urgency:

Colonoscopy?:

Primary: "SELF PAY" [0]
Changing the insurance will erase all authorization-related information recorded beneath this insurance.

Referral is: Not required Approved Denied

Referral #: Prior Authorization # Here

Effective dates: to

Visits approved:

Additional information:

Displayed on print/fax

HIDE

If Prior Auth required these field required.

The Authorization is **REQUIRED** for the interface to send the referral from athenaOne to LeadingReach. If your order is not in the draft state in outgoing this means this step was potentially missed.

Step 12: Select **View Actions** by scrolling to the bottom of the referral and clicking the hyperlink.

History

Date / Time	Action	Action By	Status	Priority	Assigned To	Action Note
08-07-2023 9:10 PM	Create	sechols6	REVIEW		bthwaites5	
08-07-2023 9:25 PM	Approve	sechols6	SUBMIT		MODERA PROSPER OFFICE STAFF	Order Signed (pin to top)
08-07-2023 9:25 PM		ATHENA	SUBMIT		referrals	Task Assignment Override #88 Applied (pin to top)

cardiologist referral in SUBMIT to referrals #31188 [VIEW ACTIONS](#)

Step 13: Select **"Order Submitted"**. Click on the dropdown and choose **"By paper Print-out"**. This will auto-select **"Order Submitted."**

Date / Time	Action	Action By	Status	Priority	Assigned To	Action Note
08-07-2023 9:10 PM	Create	sechols6	REVIEW		bthwaites5	

Order Submitted By paper Print-out

 Submit by Athena Fax By paper Print-out Pin to top

Close ⓘ by Athena Fax

 By Phone

HIDE ACTIONS | MORE ACTIONS

Step 14: Click **Save**. Your order is now awaiting transfer to the LeadingReach via the API. The system listens and pulls referrals into your LeadingReach account at an interval of 1 minute.

Order Submitted By paper Print-out

 Submit by Athena Fax Pin to top

Close ⓘ

HIDE ACTIONS | MORE ACTIONS

[Return To Office \(none\)](#)
[Audit History](#)

Step 15: Open LeadingReach in a new Chrome browser.

Navigate to the **Outgoing** Tab under the **Referrals** section in LeadingReach.

This is where the Draft referral(s) are sent to be processed.

Created	Type	Referral	Actions	Updated	Status
9:51 PM	Digital (Draft)	ACY30E Interface Test Reason: ICD10: M54.6 Pain in thoracic spine To: None	Edit	9:51 PM	Draft

Step 16: To begin processing referrals sent to LeadingReach via the integration set your filter to Draft.

Hover over the referral you would like to process. This will highlight the referral blue. Click anywhere in the highlighted section to begin.

Created	Type	Referral	Actions	Updated	Status
9:51 PM	Digital (Draft)	ACY30E Interface Test Reason: ICD10: M54.6 Pain in thoracic spine To: None	Edit	9:51 PM	Draft

Filters

Date Filters:

Select Column

In the last:

Select Date Filter

Enable Custom Date Range

Referral Not Viewed

Unread Messages

Hide Exposed Tags

Forwarded Referrals

Created

Draft

Pending

Step 17: Ensure the ordering provider populated in the **“Send Referral on behalf of”** field – this is necessary for tracking data purposes and to allow the referral to be sent. Select a provider if this has not pre-populated.

Send Referral on behalf of Catalyst Health Network - Administration ▼

- Catalyst Health Network - Administration
- Bridgeport Family Practice
- Dr Testing M.D.**

1 Which patient are you referring?
Select a patient by searching by

Patient Name or MM/DD/YYYY

Step 18: LeadingReach Step #1

1. This section will be auto populated from the athena referral via the integration. If you need to edit the patient information click **“Edit Patient”**

1 Which patient are you referring?

Patient Information:

Name: Interface Test
Date of Birth: 01/01/1990
Main Phone: (112) 345-6789
[Additional Notes to Patient](#)

Patient Communication Settings:

Do not send email to patient

If this is a new patient, once the referral is sent it will save the patient.

Step 19: LeadingReach Step #2 (This section is not auto populated)

- Search for the referred to specialist.
 - First select Catalyst Health Network – this allows you to select plan options available.

2 Where are you sending this referral?

Search

Select Network Hub Search by NPI, Specialty, Provider, Organization

Catalyst Health Network

Specialty

Tags

Zip Code 56789

Distance 25 Miles

Search

2 Where are you sending this referral?

Search

Catalyst Health Net... X Select a Plan Select Hub Tags Search by NPI, Specialty, Provider, Organization

Specialty

Specialty

Tags

Zip Code 56789

Distance 25 Miles

Search

Catalyst Health Network requires the selection of the patient's Plan to determine which providers they can be referred to. After selecting a Plan option, type in the Organization/Provider name in the Choose Provider section below to search for your intended recipient. Catalyst Health Network will be automatically added as a Collaborator to this referral. If you do not see the patient's Plan name option listed, utilize the Catalyst Preferred List.

- Select the patient's plan from the drop-down list.
 - Scroll through the list or type the plan name in this section.

2 Where are you sending this referral?

Search

Catalyst Health Net... X Select a Plan Select Hub Tag Search by NPI, Specialty, Provider, Organization

Specialty

Specialty

Zip Code 78731

Distance 25 Miles

Search

3 Do you have any additional information?

Reason

Insurance Provider

Specialty

Specialty

Tags

Zip Code

Distance

Search

Aetna

American Airlines/DFW ConnectedCare

Anthem (Elevance Health)

BCBS

BSWH Employee Medical Plan

Catalyst Community Foundation

Catalyst Preferred List

If the patient's plan is not listed, please utilize the Catalyst Preferred List

- If the patient's plan falls into one of the **Preferred Networks** listed below, a payer specific list has been utilized and loaded into LeadingReach which will limit the providers visible in plan.
 - UHC
 - Baylor Plans
 - BSW Employers Health Network
 - BSW Employee Medical Plan
 - BSW Premier Plan – Aramark
 - BSW Premier Plan – PrismElectric
 - BSW Connected Plan – CHN
 - BSW DFW CareConnected/American Airlines
 - Centivo Plans
 - Centivo – Benjamin Moore
 - Centivo – Nebraska Furniture Mart
 - Centivo – AT&T
 - Centivo – Kohls
 - Centivo – EnsignGroup
 - Healthcare Highways
 - WellMed

If you are sending a referral for a Centivo, please follow the workflow linked here: [Centivo Workflow](#)

If you are sending a referral to the Care Team or Stellus Rx, please follow the workflow linked here: [Care Team/StellusRx](#)

If you are sending a referral for Palliative Care, please follow the workflow linked here: [Palliative Care](#)

In the “**Search by NPI, Specialty, Provider, Organization**” global search bar, type the information you would like to search by to find the specialist you are trying to refer to.

- **Options to refine your search via filters:**

Select Hub Tag: Utilize the free text/drop-down option to refine your search based on tags loaded in the system by Catalyst. For example, ASC preferred provider tag.

Specialty: Utilize the free text/drop-down option to search to select one or more specific specialties.

Tags: Utilize the free text/drop-down option to refine your search based on tags loaded in the system by your organization. For example, Medicaid. Note if your organization does not use tags there will not elect here.

Zip Code & Distance: Utilize the free text field option to refine your search based on zip code and/or the drop-down option for the distance filter.

- The zip code will default to the practice/patient zip code – this can be deleted or changed.
- The distance will default to 25 miles but may be changed by selecting one of the drop-down options.

Complete provider search once search criteria entered.

- Search results will appear with organization/provider information on the left and a map view on the right.
- If your referred to provider is not in LeadingReach - **Utilize “Digital Connection Not Available” Opt Out Reason** and to select an available fax contact
- If Fax Contact Not available utilize this workflow: [Add a fax contact](#)

- To select a provider, click on the provider’s name.

- If multiple locations exist, select the location first, then select the provider at that location.

Final view of selected provider in step 2

NEW RESULT SEARCH FEATURES

If provider/org is grayed out the location/provider it is not yet added to your network
Click "Add to my Network" to make available.

Hover over icons to reveal information.

- Exclamation reveals providers primary specialty.
- Green tags will list all internal provider/network tags.
- Clicking on the location symbol will provide detailed information on the map view of the location.

Step 20: LeadingReach Step #3: (This section will auto populate from athena).

- Diagnosis and ICD 10 code(s) for the referral in the **Reason** field.
- The **Insurance Provider** field will pull from the patient's entered insurance on the referral.
- If insurance prior authorization required, on referral you must select approved and entered to the referral # field populate. *See step 11.*
- LeadingReach API will auto attach the following documents: most recent closed Encounter & Procedures/Patient Care Summary, CCDA (will include allergies, medications, problems, procedures, results, past encounters, social history, vaccine list, plan of care, vitals and document info), copy of the primary insurance card. In addition, add Lab(s)/Imaging Results when available.

3 Do you have any additional referral information?

Status

Reason

6 Insurance Provider (optional)

7 Insurance Authorization Code (optional)

8 Tags

Optional Notes

The following information is available about the referral destination:

Name
Rob D Dickerman DO
Fax Number
(972) 378-6925
First Name
Rob
Last Name
Dickerman

9 neurological surgeon referral

referral_127515_202311220351_ccda.xml

Attach Files

- Add additional information as necessary in the **Optional Notes**.

Step 21: Select **Time-Sensitive** or **Urgent** as needed. Then, click **Send**.

Normal
 Time-sensitive
 Urgent

Step 22: LeadingReach integration will send status updates back into athena to the **SUBMITTED** referral and will be noted in the *Action By* column as API. You will now receive a Received notification within 1 minute of clicking Submit by Paper Print Out.

11-21-2023 9:50 PM	Order Submitted - By paper Print-out	sechols6	SUBMITTED			
11-21-2023 11:43 PM	Print	sechols6	SUBMITTED			
11-21-2023 11:53 PM		API-2364	SUBMITTED			Status was changed to Sent at 2023-11-21 23:53 pm CST. (pin to top)
11-21-2023 11:54 PM		API-2364	SUBMITTED			Status was changed to Cancelled at 2023-11-21 23:54 pm CST. (pin to top)

neurological surgeon referral in SUBMITTED to nobody #127515 [VIEW ACTIONS](#)

Save Cancel [Audit History](#)

- If a referred to provider updates a status with the schedule appointment button this will provide this information as an Action Note like the one noted below:

11-21-2023 2:55 PM		API-2364	SUBMITTED			Status was changed to Scheduled at 2023-11-21 14:55 pm CST. The appointment for referral REF-ACX5OX is scheduled for 2023-11-21 11:50 am with Polk Davis Family Practice- Aaron Polk M.D. (of Catalyst Health Network) at Aaron Polk. (pin to top)
--------------------	--	----------	-----------	--	--	--

- If a referred to provider updates a status to complete and the consult noted is added at that time the integration will send the consult note to athena as a clinical document (pin to be reviewed and labeled. This will allow the referral to be closed due to 'result received'.

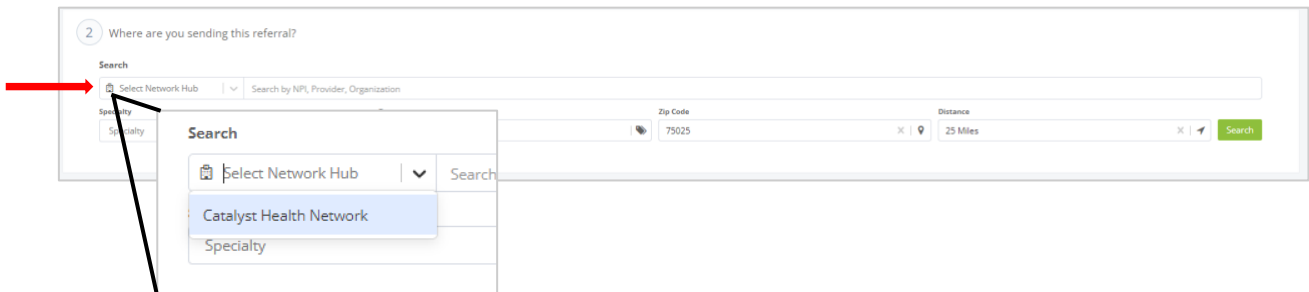
11-21-2023 3:26 PM		API-2364	SUBMITTED			Status was changed to Completed at 2023-11-21 15:26 pm CST. (pin to top)
11-21-2023 3:27 PM	Result Received	ATHENA	CLOSED			Result received as document 127079 (pin to top)

Sending Care Team & Pharmacy Support via LR

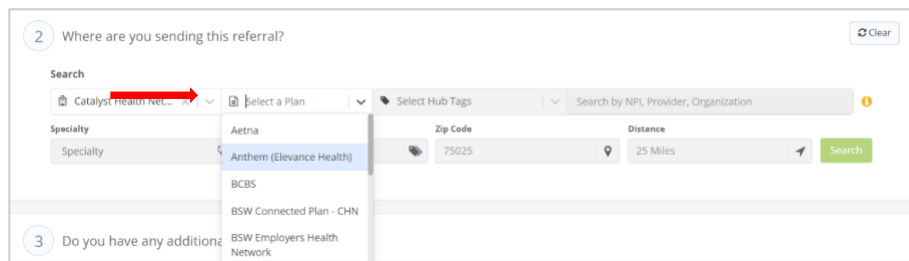
Purpose: To describe the workflow in LeadingReach to send Care Team and Pharmacy Support Only (Non-medication Management) Referrals.

Care Team Referral Workflow

Step 1: Navigate to step 2 section within the referral in LeadingReach. Select Catalyst Health Network in the Select Network Hub

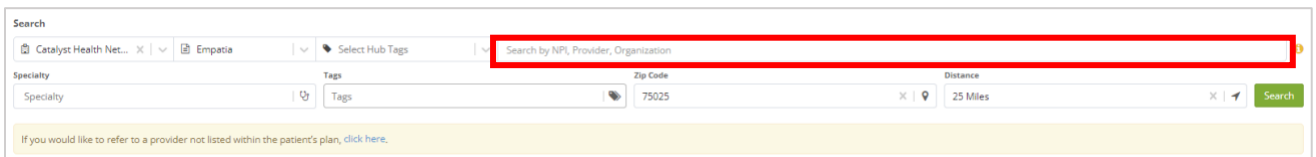


Step 2: The Select a Plan search option appears once Catalyst Health Network is selected. Select/type the plan associated with the patient’s insurance plan. ****If plan is not listed select Catalyst Preferred List.**



Step 3: Search for the Care Team digital connection.

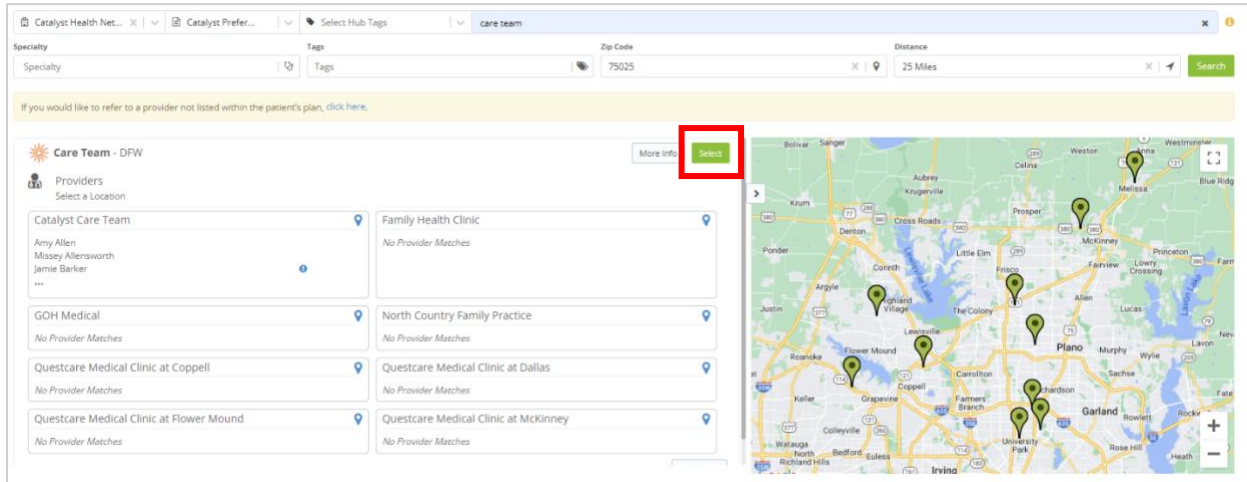
- Type “**Care Team**” in the Search by NPI, Provider, Organization field. Click **Search**.



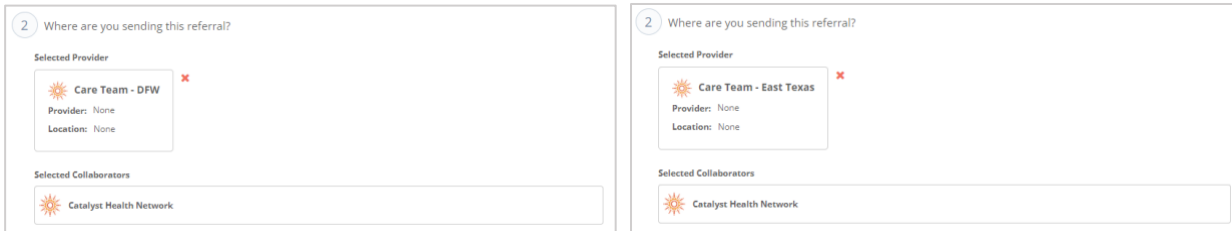
NOTE: Remove the distance parameter if a ‘no result found’ results from the search.

Step 4: Select Care Team Digital Connection.

- Care Teams are region based – Select the Care Team for your region.
 - Care Team – DFW, East Texas, Panhandle

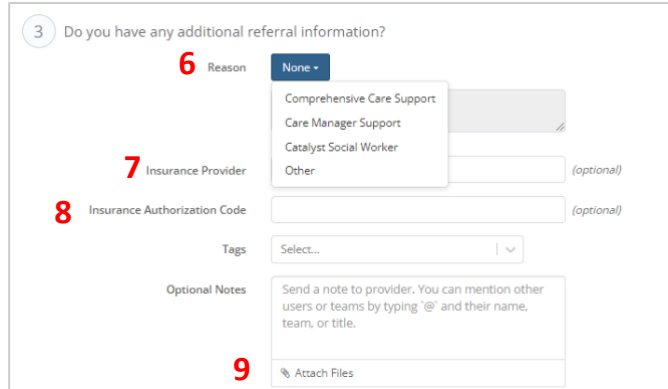


- Step 2 section pictured below when correctly selected with Catalyst Health Network as a collaborator.



Step 5: Continue with step 3 section in LeadingReach.

6. **Reason:** A dropdown of referral options is available.
 - i. **Comprehensive Care Support:** Catalyst Comprehensive Care Support (NOT a Specialist) Care Manager/Coordinator and Pharmacy Team outreaches
 - ii. **Care Manager Support:** Catalyst Care Manager Support only (NOT a Specialist) Care Manager/Coordinator outreaches.
 - iii. **Catalyst Social Worker:** This is for a Catalyst social worker (NOT a Specialist) support through Catalyst team in the assistance of behavioral health resources and screenings, Social Determinants of Health (SDoH), and community resources.
 - iv. **Other:** Free Text Reason for Referral
7. The **Insurance Provider** field, add payer, plan type (HMO, PPO, etc.) and Member ID.
8. Insurance Authorization Code is not applicable.
9. Attach the following files/documents in PDF format or utilize LeadingReach sync (cloud based EMRs only): **last office visit, medication list, patient demographic/Facesheet, recent supporting labs and/or imaging, and a copy of the patient’s insurance card(s).**



3 Do you have any additional referral information?

6 Reason **None**

- Comprehensive Care Support
- Care Manager Support
- Catalyst Social Worker
- Other (optional)

7 Insurance Provider (optional)

8 Insurance Authorization Code (optional)

Tags Select... | v

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

9 Attach Files

- Add additional information as necessary in the **Optional Notes**.

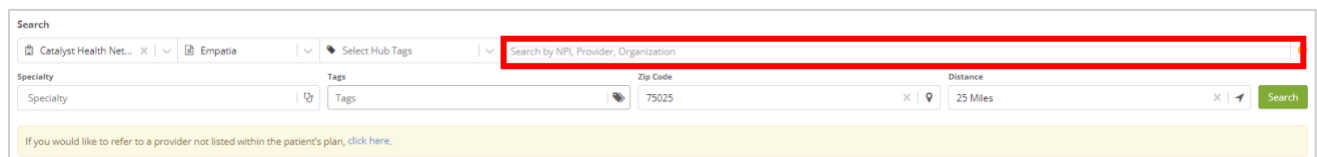
Pharmacy Support Only Referral Workflow

** Non-medication management referrals only. Utilizing the eScript workflow will provide the fastest most comprehensive follow up and outreach.

Follow Step 1 and 2 as indicated in the Care Team Referral Workflow.

Step 3: Search for the Stellus Rx digital connection.

- Type “Pharmacist Stellus Rx” in the Search by NPI, Provider, Organization field. Click **Search**.



Search

Catalyst Health Net... Empatia Select Hub Tags

Search by NPI, Provider, Organization

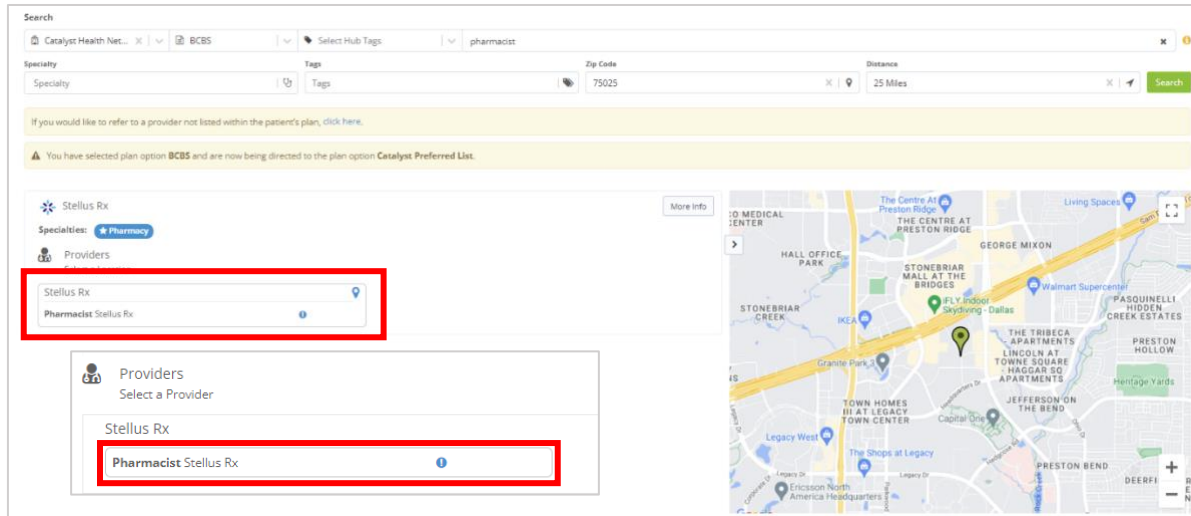
Specialty Tags Zip Code 75025 Distance 25 Miles Search

If you would like to refer to a provider not listed within the patient's plan, [click here](#).

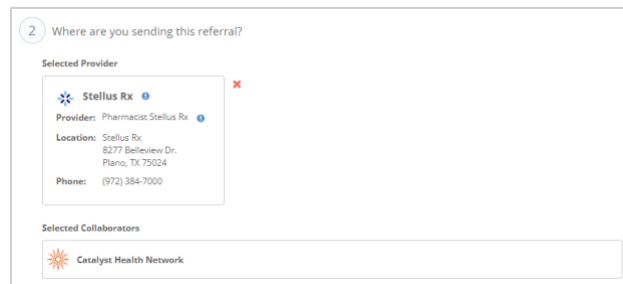
NOTE: Remove the distance parameter if a ‘no result found’ results from the search.

Step 4: Select Stellus Rx Digital Connection.

- Click Stellus Rx – Pharmacist Stellus Rx



Step 2 section pictured below when correctly selected with Catalyst Health Network as a collaborator.



Step 5: Continue with step 3 section in LeadingReach.

6. **Reason:** A dropdown of referral options is available.
 - i. **Pharmacy Support:** Stellus Rx Pharmacist (NOT a Specialist) consult and recommendations
 - ii. **Other:** Free Text Reason for Referral
7. The **Insurance Provider** field, add payer, plan type (HMO, PPO, etc.) and Member ID.
8. Insurance Authorization Code is not applicable.
9. Attach the following files/documents in PDF format or utilize LeadingReach sync (cloud based EMRs only): **last office visit, medication list, patient demographic/Facesheet, recent supporting labs and/or imaging, and a copy of the patient’s insurance card(s).**

3 Do you have any additional referral information?

6 Reason

7 Insurance Provider



8 Insurance Authorization Code

Tags

Optional Notes

9

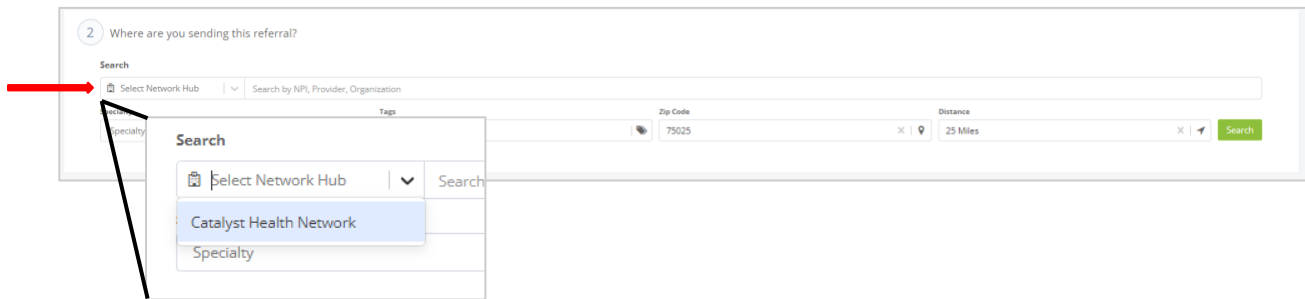
Final Step: Select **Time-Sensitive** or **Urgent** as needed. Then, click **Send**.

Normal  Time-sensitive  Urgent

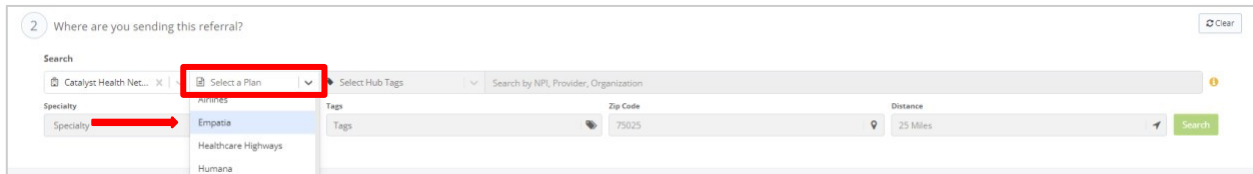
Sending Palliative Care Referrals – Empatia

Purpose: To describe the workflow in LeadingReach to send a palliative care referral to Empatia Palliative Care.

Step 1: Navigate to section 2 within the palliative care referral in LeadingReach. Select Catalyst Health Network in the Select Network Hub

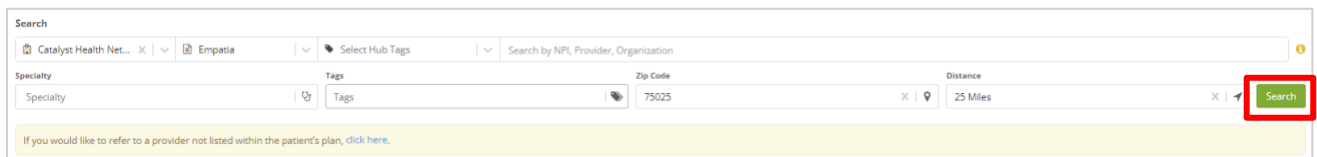


Step 2: The Select a Plan search option appears once Catalyst Health Network is selected. Select/type Empatia.



Step 3: Search for the Empatia Palliative Care digital connection.

- Click Search.

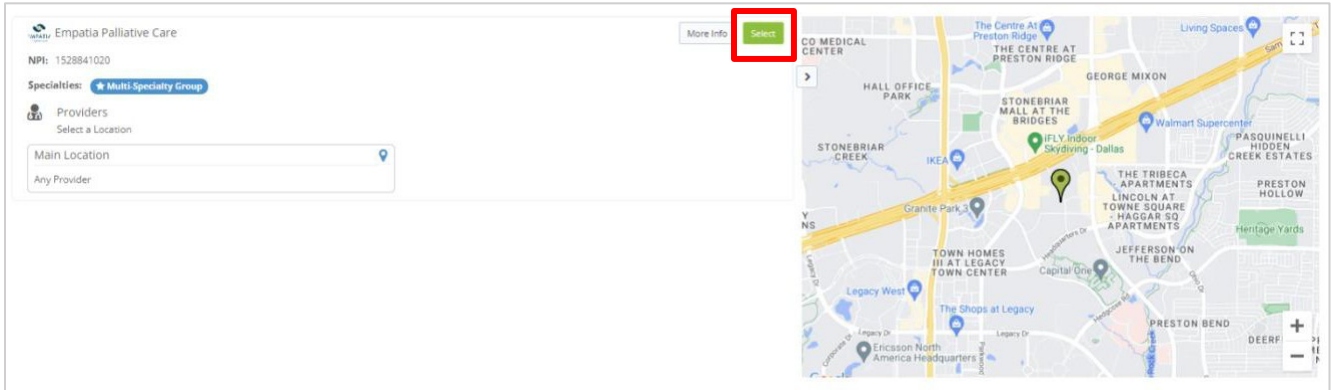


NOTE: Remove the distance parameter if you a 'no result found' results from the search.

No results found



Step 4: Select Empatia Palliative Care Digital Connection.



- Once selected section

2 Where are you sending this referral?

Selected Provider

Empatia Palliative Care ⓘ ✕

Provider: None

Location: None

NPI: 1528841020

Phone: (469) 365-2225

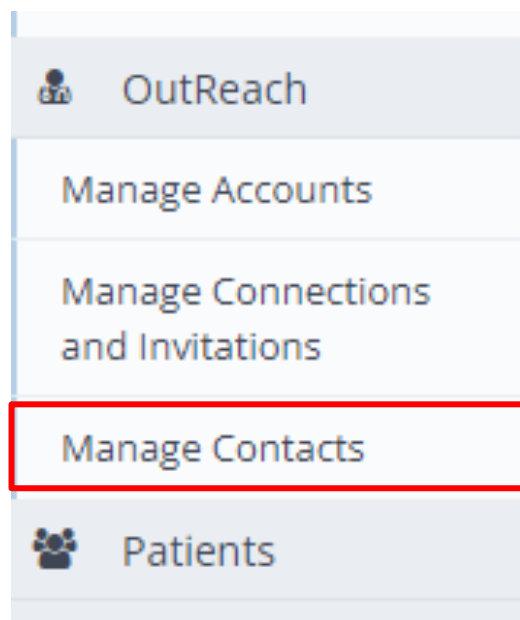
Selected Collaborators

Catalyst Health Network

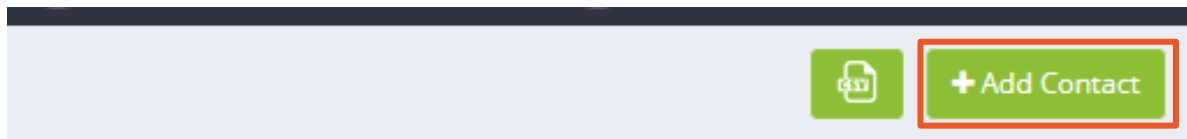
Adding Faxes

Purpose: To describe the process of adding fax contacts in LeadingReach. Only the admin role can add faxes to an account.

Step 1: On the left side menu in LeadingReach, scroll down to Manage Contacts. Click on that title and a new tab/screen will open.



Step 2: Click on **+Add Contact**





Step 3: Complete all fields indicated below.

NOTE: Fields indicate 'optional' but you will not be able to send without all highlighted fields. The primary specialty and specialties field will auto-populate after the NPI is added.

Add Contact

Add Contact Bulk Add

Practice Name
Texas Health Care-Pain Management

Provider First Name (optional) Michael
Provider Last Name (optional) Phillips

Provider NPI
1306823927

Primary Specialty
Interventional Pain Medicine Physician

Specialties ⓘ
Anesthesiology Physician x Pain Medicine (Anesthesiology) Physician x
Interventional Pain Medicine Physician x

Phone (optional) 817-558-4600
Fax (optional) 817-740-2254

Email (optional)

Network Tags (optional)
Select...

Hub Tags (optional)
Select...

Step 4: Click Save in the upper right-hand corner.

Cancel **Save**



LeadingReach FAQs

1. What is LeadingReach?

LeadingReach is a HIPAA-secure, web-based platform that combines the largest connected provider community in healthcare with clinical workflow management tools, secure team-based chat, and document exchange.

Catalyst Health Network has partnered with LeadingReach to provide network members with:

- Access to a large network of specialists
- An online standardized referral management process
- Insight and visibility into referral status and real-time care navigation
- Catalyst Health Network support via the Referral, Training and Care Teams that provide dedicated follow-up
- Bi-directional efficient and secure communication channels
- In-depth analytical data

2. Why is it necessary to utilize LeadingReach to send my referrals?

As a Catalyst Health Network physician, we partner with you to limit your patient's total cost of care. Through the use of LeadingReach, physicians are able to better and more efficiently manage the patient's healthcare journey with workflow management tools provided by the platform.

LeadingReach gives you, the physician, more insight and control over where your patient receives specialist care via preferred/narrowed network plan designations. It also gives you access to the Catalyst referral team to assist in focused referral follow-up to ensure that patients are able to be scheduled for appointments.

2024 LeadingReach FAQs

3. What types of referrals are supported using LeadingReach?

- a. Specialist Navigation (Referral): This is a referral to a specialist via the LeadingReach platform, including imaging and diagnostic facilities.
- b. Preventative Health Navigation (Referral): This is a referral for a preventative health screening (eg. colonoscopy, mammogram, diabetic eye exam)
- c. Comprehensive Care Support: This is a referral sent to the Catalyst Care Team and Stellus Rx requesting patient support and chronic condition management.

4. Can I send all my referrals with LeadingReach?

We encourage you to utilize the benefits of the LeadingReach platform by sending all referrals to specialists, regardless of contracts. For Comprehensive Care Support, please only send patients that are Catalyst Health Network contracted attributed patients.

5. What do I need to include as attachments in my referrals?

With every referral you should include:

- Patient demographics and insurance information, including an image of the primary insurance card
- Last office visit notes
- Recent labs, imaging and list of medications
- Any other pertinent information related to the patient referral

6. Is LeadingReach Health Insurance Portability and Accountability Act (HIPAA) compliant?

As a leader in cloud-based physician referral and patient engagement applications, LeadingReach understands the need to treat patient information in a manner that protects the privacy and security of protected health information (PHI). You can access and review Leading Reach's HIPAA Compliance and Privacy Statement here: <https://leadingreach.com/privacy-policy/>

2024 LeadingReach FAQs

7. What does the Catalyst Referral team do when I add them as a Collaborator?

Adding the Catalyst Health Network (referral team) as a collaborator and the “focused specialty tag” acts as a “cc” function on the referral for our focused specialties. This allows the referral team to follow-up when appropriate and ensure that the intended specialist is updating, scheduling, and receiving the required information to complete a referral. Please remember that these services are only available for our 8 focused specialties as well as urgent referrals.

8. How often should I be logging into LeadingReach? Why?

We recommend that you login to LeadingReach daily. This ensures that you receive important notes and requests for documents that may be needed to process a referral in a timely manner. If a request for documents/action item is not responded to, the patient may not be able to schedule or be seen, resulting in the referral being declined/cancelled by the preferred specialist.

9. What is the difference between the Catalyst Referral Team and the Catalyst Care Team?

The Catalyst Referral Team is known as Catalyst Health Network in LeadingReach. This team works behind the scenes on collaboration referrals to follow-up on focused specialties.

The Catalyst Care Team is a team of clinical staff working to support your patients and acts as an extension of your practice. This includes, but is not limited to, Case Managers (RNs), Care Coordinators (LVN/MA) and Social Workers.

10. What are the different types of support/services offered by the Catalyst Care Team?

Case Manager Support: Provided by a registered nurse care manager, the care managers provide chronic disease support that is aligned with the primary care provider’s plan of care. The care managers also support transition of care patients after they are discharged home from an acute care setting.

2024 LeadingReach FAQs

- **Transition of Care (TOC) Care Manager:** The transition of care team aims to reduce potentially preventable readmissions during the 30 days following discharge from an acute care setting.
- **Comprehensive Care Support Care Manager:** A registered nurse care manager provides comprehensive care support and is additional support for chronic disease patients in coordination with the primary care physician. The care manager uses the care plan provided by the physician to continue to educate and support the patient.

Care Coordinator: The care coordinator is responsible for coordinating services and assisting patients in providing support, education, and assistance in the prevention and/or maintenance of their disease and/or health and wellness state. They also support the transition of care process.

- **Admin Care Coordinator:** Their role is to introduce patients to the support services provided by the care team. They are also responsible for following patients who are admitted to a hospital or rehab setting by checking admission status, requesting records, and notifying the primary care physician.

Social Work: Their role is to help improve outcomes in people's lives by evaluating the psychosocial and emotional needs of patients, assist in discharge planning, and provide community resources in relation to barriers of care.

11. What should I do when I need to add/remove: a new user, new provider, location or or add a specialist to an existing LeadingReach Account?

Please send an email to contactus@catalysthealthgroup.net and provide the following information:

Must include if new/update to provider:

- Provider Full Name
- Provider Credentials
- Provider NPI
- Provider Email

LeadingReach FAQs

- Provider Phone Number
- Provider License Number
- Supervising Physician (if APP)

Must include if new/update to location/facility:

- Location Address & Phone New TIN (if applicable)
- Providers with NPI at that location

Must include if removing/termining provider/location:

- Provider Full Name/Location Name
- Provider Credentials
- Date Provider/Location Termining/Termed

To add a new user to your account, an admin role would click on 'manage users' to create a new user role and add the name and email address for the new user.

You will need to add their name and organization provided email address, select their role – user or admin and create a temporary password.