

# SEND REFERRALS TO PTS

with Leading Reach

PT Solutions is using LeadingReach to send referrals, track their status, capture appointment details, and collect visit notes from specialists.

## Step 1

Search for the patient in your LeadingReach account:

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

If you do not locate the patient, enter the required fields in LeadingReach:

Send referral on behalf of John Smith

1 Which patient are you referring?

Patient Information:  
First Name:   
Middle Name:   
Last Name:   
Date of Birth: MM/DD/YYYY   
Sex:   
Additional Notes to Patient:

Contact Information:  
Personal Email:   
Mobile Phone:   
Address Information:   
Day Code:

## Step 2

Search the LeadingReach network for the PT Solutions organization that will receive this referral.

2 Where are you sending this referral?

Choose Provider: Name   or

- OR -

1. Choose Network Group  2. Choose Provider

Selected Provider: Please search for or select a provider from above.

Collaborators You can add Collaborators to a Referral to give them access to the Referral conversation.

## Step 3

Enter the reason for therapy referral (with CPT code preferred) and attach the signed prescription for therapy.

3 Do you have any additional referral information?

Reason  (include CPT code)

Insurance Provider  (optional)

Insurance Authorization Code  (optional)

Tags

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

Optional Notes

Attach signed prescription for therapy, insurance card and any other additional information.

Inform the patient they will receive a call from the specialist's office to schedule their appointment.