

# Sending Referrals via LeadingReach



Organizations use 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.

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

- 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

Q Search Patients

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

Tags:

+ Additional Notes to Patient

Contact Information:

Personal Email:

+ Additional Email Options

Mobile Phone:

+ Additional Phone Options

Address Information:

Zip Code:

+ Additional Address Options

## STEP 2

Search the LeadingReach Network for the organization or provider that will receive this referral.

- 2 Where are you sending this referral?

Choose Provider Name Q Search by Provider or Q Search by Organization

- 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.

+ Add Collaborator

Q Search by Provider

OR

Q Search by Organization

## STEP 3

Enter the reason and any additional information (in the Optional Notes section) you want to share with the organization or provider receiving this referral.

- 3 Do you have any additional referral information?

Reason

Insurance Provider  (optional)

Insurance Authorization Code  (optional)

Tags Select... |

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

Attach Files

### Optional Notes

Attach the recent visit note and lab results, ID card, insurance card(s), and provide authorization information in the optional notes section.

Attach Files



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