Second Wind Fund of Boulder County

Automated Referral Management System (ARMS) User Guide for Qualified Referral Sources (QRS)
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1 Overview

ARMS provides the Second Wind Fund of Boulder County (SWFBC) community with a resource that makes it as efficient as possible for a Qualified Referral Source (QRS) to acquire and manage authorized SWFBC referral numbers. These numbers can then be used to secure therapy services for at risk youth in need of financial support.

a. The QRS will use ARMS to request a referral number via completing the on-line application and submitting it to SWFBC.
b. ARMS will immediately send an e-mail to the QRS with the authorized referral number.
c. The QRS will then work with the client and parents/guardians to choose a therapist from the list of SWFBC providers which can be found on the organization’s website, swfbc.org.
d. The QRS will then log into the ARMS website, swfbcreferral.org, and select a therapist.
e. An automatic e-mail will be sent to the selected therapist notifying her/him of the selection and providing her/him with the client information that the QRS submitted as part of the Referral Request. **Note:** The QRS and/or client/parents/guardian are responsible for providing the selected Therapist with contact information for the student. For privacy reasons, SWFBC does not collect the personal contact information for students participating in the program. It is suggested that the QRS and selected Therapist have a dialog prior to the Therapist making the decision to accept or decline the case.
f. The selected therapist, after logging onto ARMS, will either accept or decline the case.
g. The system will alert the QRS via e-mail confirming acceptance or decline of the referral by the therapist.
h. If the selected therapist has declined the case, then the QRS and client will need to repeat the process by selecting an alternative provider from the SWFBC list.
i. When logged into ARMS, each QRS can monitor the status of all referrals that have been issued specifically to them. Each QRS will only have access to those referrals that have been specifically issued specifically to them. The QRS will be able to see when the selected therapist has conducted sessions with each of the specific QRS’s clients and any comments that the therapist has entered for each session.

2 QRS Access to SWFBC ARMS System

a. Each QRS will need to be pre-authorized to access the system. The QRS’s name, e-mail address and phone number must be in the ARMS database.
b. The QRS will log in as a QRS user using this link: [https://swfbcreferral.org/](https://swfbcreferral.org/).
c. The QRS will enter her/his e-mail address and password. If this is the first time that a QRS has logged into the system or the QRS has forgotten a previously established password, the QRS needs to click on “forgot password”. The system will send an e-mail to the QRS’s e-mail address with a link for establishing a new password. The QRS will then be able log on to the system.
d. If the system does not recognize the QRS e-mail, the QRS is not on the pre-authorized list. The QRS should contact the SWFBC executive director, Faye Peterson, at swfbc.org@gmail.com or 720-212-7527.
3 Requesting a Referral Number

QRS users are responsible for submitting requests for referral numbers via ARMS.

a. Log into ARMS
b. Click on the “+Add Referral” green button that appears in the upper left of your screen. A form, “Add Referral” will open. This form has a number of drop-down menus to select from and some empty box fields to fill in.
c. Select the applicable information from the drop-down choices and enter in the requested information in the empty boxes. When selecting an “Other” value from the drop down for School, School Level, Financial Need, Ethnicity, Gender and/or Preferred Language a new field will become visible where a custom input can be entered.
d. After entering the required information click on “Save” in order to save the new referral in the system.
4 Editing a Referral Number

a. It is possible to view and edit a referral by using the buttons under “Actions” at the top right of your screen.

b. When clicking the expand button, “+” under the action column (arrow “b” below), the information that you have submitted is presented.
c. If you need to edit the information submitted as part of a specific referral request, select the edit button (arrow “c” below) under the action column and make the necessary changes. This can only be done when the referral is still in the “Pending” state.

<table>
<thead>
<tr>
<th>Age</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>pending</td>
<td>b</td>
</tr>
<tr>
<td>12</td>
<td>active</td>
<td>c</td>
</tr>
</tbody>
</table>

d. The referral status can be changed for the referral using the status drop down. A referral can be in one of four states. The first is the Pending state. A referral is automatically put in a Pending state once it has been issued to a QRS. A referral automatically moves from Pending to Active, once the referral has been accepted by a therapist. A referral is moved from Active to Complete by the therapist once the therapist has determined that the client does not require any additional SWFBC funded sessions. A referral is moved from Pending to Declined by the QRS when the client and/or parents/guardians decide not to pursue services with a therapist on the SWFBC provider list. The only ability that a QRS has relative to changing a status is to change a referral from Pending to Declined (arrow “d” below). When a Referral is moved from Pending to Declined by the QRS, ARMS will present a block where the QRS must enter the reason why the specific Referral is declined (e.g. family has obtained Medicaid and secured alternative consoling, family has moved out of the school district, parents and QRS determined that therapy is not required at this point in time). Once the status is updated, a pop up will appear in the top right of the screen with a success message.
5 Selecting a Therapist

a. In order to assign or replace a therapist for a referral, the QRS will click on the “Assign Therapist” button (arrow “a” below) and a new pop up will open. The popup will include the names of all active therapists that are participating in the SWFBC program (consult swfbc.org for background information relative to each of the therapists supporting the SWFBC program). After selecting a therapist from the system and clicking the “Save” button, the assignment will be completed and an e-mail will be immediately sent to the selected therapist notifying her/him that they have been selected for the specific referral. It is recommended that the QRS have a dialog with the selected therapist relative to the case before the therapist makes a decision to accept or decline the case.
b. The therapist will review the referral and then enter her/his acceptance into ARMS. The QRS will immediately be sent an e-mail by the system informing the selected therapist’s acceptance or decline. When the therapist accepts the referral, the system will automatically change its status from Pending to Active. **Note:** It is the responsibility of the QRS and/or client/parent/guardian to provide the therapist with the client’s contact information so the initial therapy session can be scheduled. If the therapist declines the referral, the QRS needs to select an alternative therapist via repeating the above process.

c. **Note:** Once the selected therapist has conducted a session with the client, the specific referral cannot be assigned to a different therapist. If the selected therapist, the QRS and/or the client/parents/guardian want to transfer the client to an alternative therapist, the applicable referral should be moved to “Completed” status by the therapist and a new referral should be requested using the steps outlined above.

6 QRS Review of Issued Referrals.

a. The QRS can review the status of all referrals that have been specifically issued to him/her.

b. To see the details associated with a specific referral, select “+” under the Action column. To see a summary of sessions that have been completed with the therapist, select View Therapy Sessions (arrow “b” below).
<table>
<thead>
<tr>
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<th>Status</th>
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</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>pending</td>
<td></td>
</tr>
</tbody>
</table>

**Risk**

- Risk Assessment Performed: ✓
- Risk Assessment: The child needs to speak with a therapist

**Therapy**

- No therapist assigned
- Assign Therapist
- View Therapy Sessions: 0

| 12  | active    |                 |

c. The referrals can be filtered by status. The possible sorts are: All, Pending, Active, Declined, and Complete.

d. In the event that the system has issued more than 20 referrals to a specific QRS, the list of referrals is continued on a second page. The navigation menu at the bottom of the screen can be used to switch between pages.