Second Wind Fund of Boulder County

Second Wind Automated Referral Management System (ARMS)– User Guide for Therapists

Contents

September 18, 2018

Revision 3

1 Overview

ARMS is intended to provide the Second Wind Fund of Boulder County (SWFBC) community with a resource that makes it as efficient as possible to acquire and manage authorized SWFBC referral numbers. These numbers are used to secure therapy services for at risk youth. ARMS is also intended to provide the SWFBC network of therapists with an efficient tool for managing and billing sessions that are provided for referrals that Therapists have accepted from SWFBC.

a. The Qualified Referral Source (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 that can be found on its website, swfbc.org.
d. The QRS then will log into the ARMS website, swfbcreferral.org, and select the chosen therapist.
e. An automatic e-mail will be sent to the selected therapist notifying her/him of the selection.
f. The therapist will then log into ARMS and view the potential client's information that was submitted by the QRS as part of the Referral request.
g. The therapist will select to either accept or decline the case.
h. An e-mail will be sent by the system to the QRS confirming acceptance or decline of the referral by the therapist. 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 the Therapist completes a session with the client, she/he enters the session into the system. If travel on the part of the therapist is required, the therapist enters that into the system as well. If a SIQ is administered, the therapist enters the SIQ score. The Therapist can also add comments applicable to the session.
j. The Therapist can then automatically submit a claim for the session to SWFBC via ARMS.
k. The SWFBC Bookkeeper will authorize payment and issue a check to the therapist.
l. Each Therapist can monitor the status of all Referrals that have been issued specifically to her/him by logging onto ARMS.
    i. The Therapist will be able to see the current status of only those referrals that have been specifically accepted by her/him.
    ii. The Therapists will be able to see when sessions were conducted, what sessions have been billed and what sessions have been paid.
    iii. The Therapists will be able to change the status of a Referral from "Active" to "Completed" when she/he has determined that no additional sessions are required for the client.
    iv. The Therapist will be able to view each "Active" and "Completed" Referral that she/he has accepted.

2 Therapist Access to SWFBC ARMS System

a. Each Therapist will be pre-authorized by SWFBC to access the system. The Therapist's name, e-mail address and phone number will be in the ARMS database.
b. The Therapist will login as a Therapist user using this link: https://swfbcreferral.org/ .
c. The Therapist will enter her/his e-mail address and password.
d. If this is the first time that a Therapist has logged into the system or she/he has forgotten their previously established password, the Therapist needs to click on "forgot password". The system will send an e-mail to the Therapist's e-mail address with a link for establishing a password. Once a password has been setup, the Therapist will then be able log on to the system.
e. If the system does not recognize the Therapist's e-mail, the Therapist is not on the pre-authorized list. She/he should then contact the SWFBC executive director, Faye Peterson, at swfbc.org@gmail.com or 720-212-7527.

3 Therapist Responsibilities

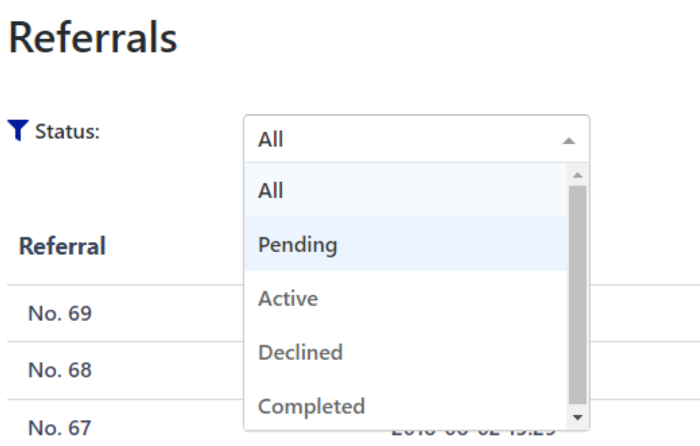
The Therapist will use ARMS to accept referrals, post sessions conducted for each accepted referral, post SIQ scores for each accepted referral and submit Billing Claims for sessions, travel and SIQs completed. Each Therapist can also use ARMS to review all activity associated with the referrals that they have accepted.

3.1 Referral Status

a. Each referral issued is in one of four status states. When a referral is issued to a QRS but has not yet been accepted by a therapist, it is classified as "Pending". Once a referral has been accepted by a therapist, the system automatically changes its status from "Pending" to "Active". If the client and or parent(s)/guardians decide not to pursue SWFBC funded therapy sessions before a therapist has accepted the referral, the QRS changes the status from "Pending" to "Declined". Once the therapist determines that no additional sessions need to be conducted with a specific client, the therapist changes the status of the referral from "Active" to "Complete".

3.2 Referral Acceptance

a. When a QRS and/or client/parent/guardian chooses a therapist, the QRS will log onto the system and select the chosen therapist from a pull-down list of all the therapists currently working with SWFBC.
b. The system will then send the therapist an e-mail notifying her/him that they have been selected. The e-mail will contain a link (swfbcreferral.org) to ARMS.
c. The therapist will then click on the link and sign in using her/his e-mail address and password.
d. The therapist will click on "Referrals" at the top left of the screen.
e. The system will then present all of the referrals that she/he has been selected for.
f. The referrals are either classified as Pending, Active, Declined or Completed. The therapist can click on the Status drop down and select "Pending". Then, only the "Pending" referrals will appear. She/he can also select "All", "Active", "Declined" or "Completed" and the referrals in those categories will appear.

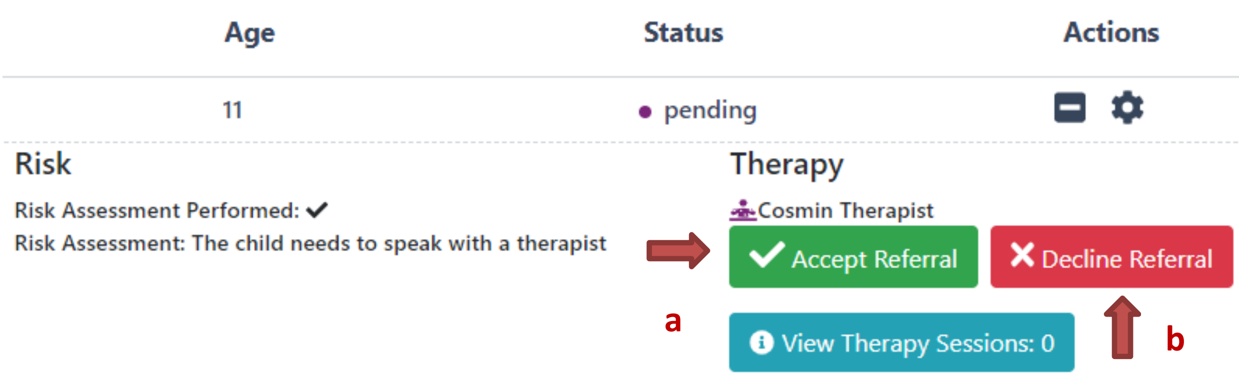


g. To Accept or Decline Pending referrals, the therapist selects Pending from the drop-down Status (see the image above) list at the top left of the screen. The list of referrals yet to be accepted by the chosen therapist will appear.

h. Under the “Actions” Column, select the “+”. The therapist will be presented with all of the information that the QRS provided relative to the client when requesting the referral plus two buttons, “Accept” (Green) and “Decline” (Red).

    a. By clicking on “Accept” (“a” arrow shown below) the therapist accepts the referral. The system will automatically change the status of the referral from “Pending” to “Active”. The system will also automatically send an e-mail to the QRS informing her/him of your acceptance.

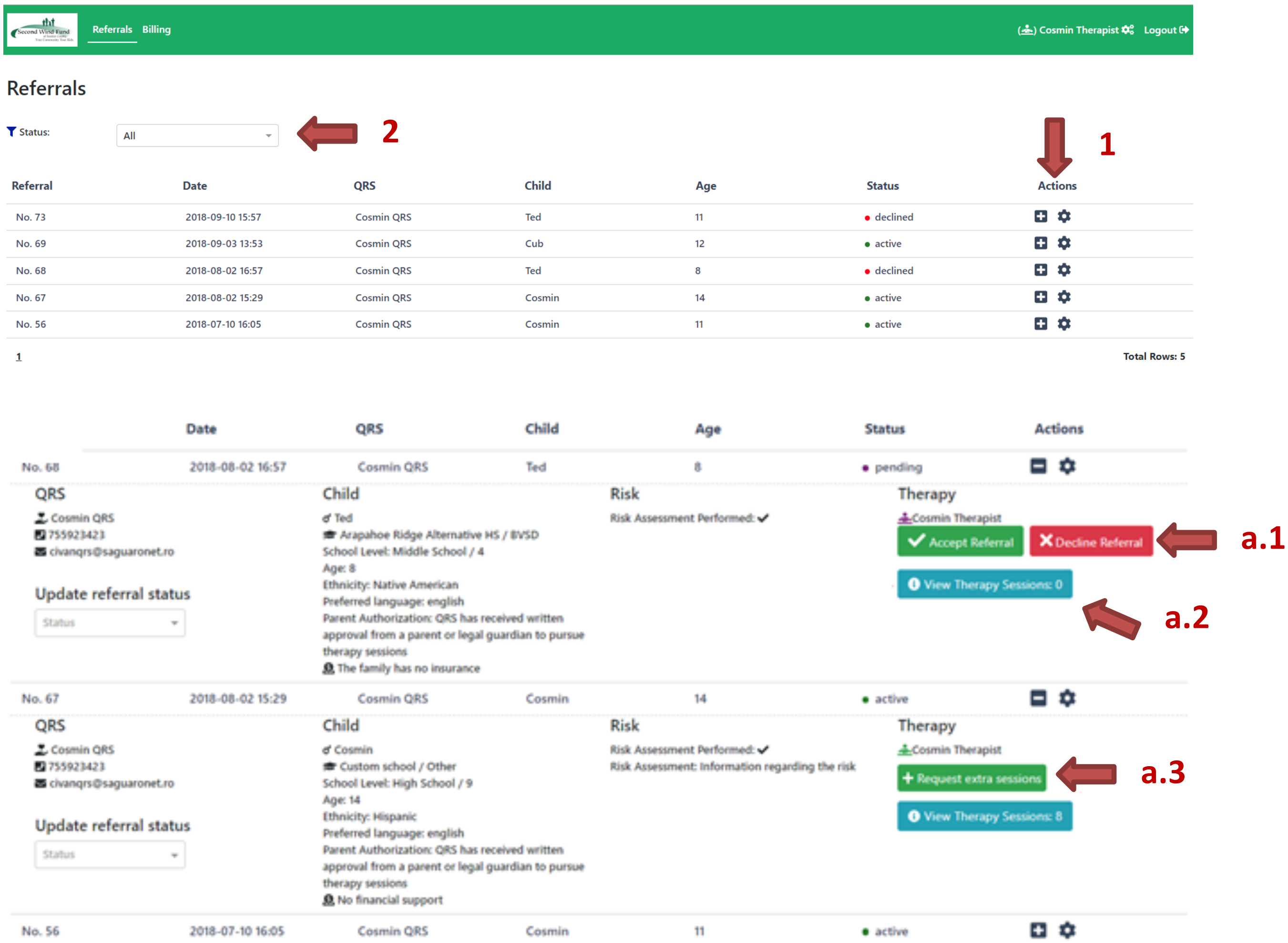
    b. If you click on “Decline” (“b” arrow shown below), an e-mail will be sent by the system to the applicable QRS informing the QRS has declined the referral. The QRS and client will then need to select an alternative provider.



i. Click on the “Referrals” menu button (top left of screen) to get to the view that matches the screen shot below.

    a. The pull-down menu to the right of “Status” (arrow #2 below) allows the therapist to sort Referrals by “All”, “Pending”, “Active”, “Declined” and “Completed” classifications.

    b. By clicking on the “+” (arrow #1 below) in the “Actions” column, the therapist will be presented with the details of the Referral and actions that she/he can take (e.g. Accepting or Declining the Referral (arrow a.1 below), viewing sessions that have been previously completed (arrow a.2 below)).



a.1 arrow above: When the Referral is assigned to the authenticated therapist and the "+" is clicked, the detailed Referral information and two buttons become available which allow the therapist to either accept or decline the referral. If accepted, the status of the Referral will automatically change from "Pending" to "Active" and sessions completed by the therapist can be entered into the system.

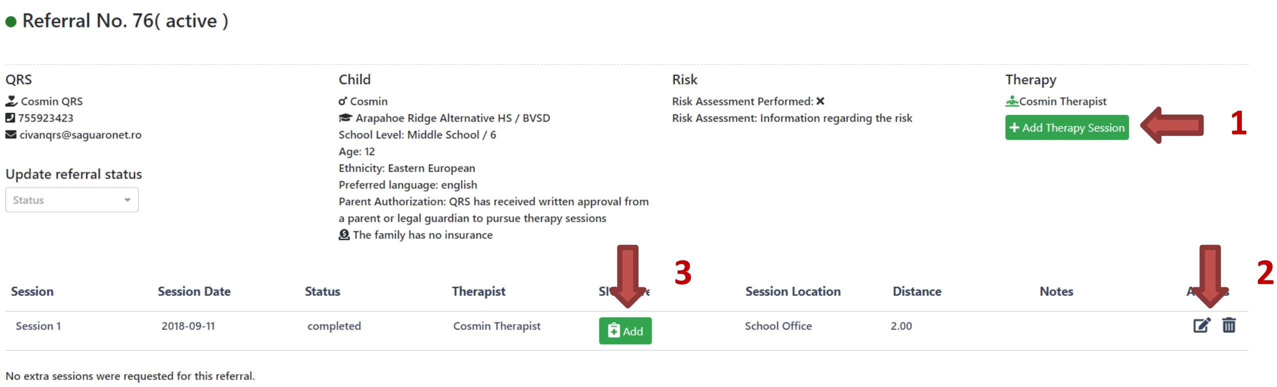
a.2 arrow above: Selection of the "View Therapy Sessions" button will cause a list of all of the therapy sessions that have been previously entered for the applicable referral number by the therapist to appear.

a.3 arrow above: When 8 sessions have been entered, the green Request Extra Sessions button will appear. Clicking on this button will allow the therapist to request additional sessions. They will be automatically granted and a notification will be sent to the SWFBC director who might contact the therapist to fully understand the need for additional sessions.
Note: If 8 therapy sessions have already been completed for a referral the "Add therapy session" button will be replaced with the "Request extra session" button.

a. When clicking the cog button, the user is redirected to a new page that contains the referral information (the information is the same as the one showed when clicking on the "+" expand button)

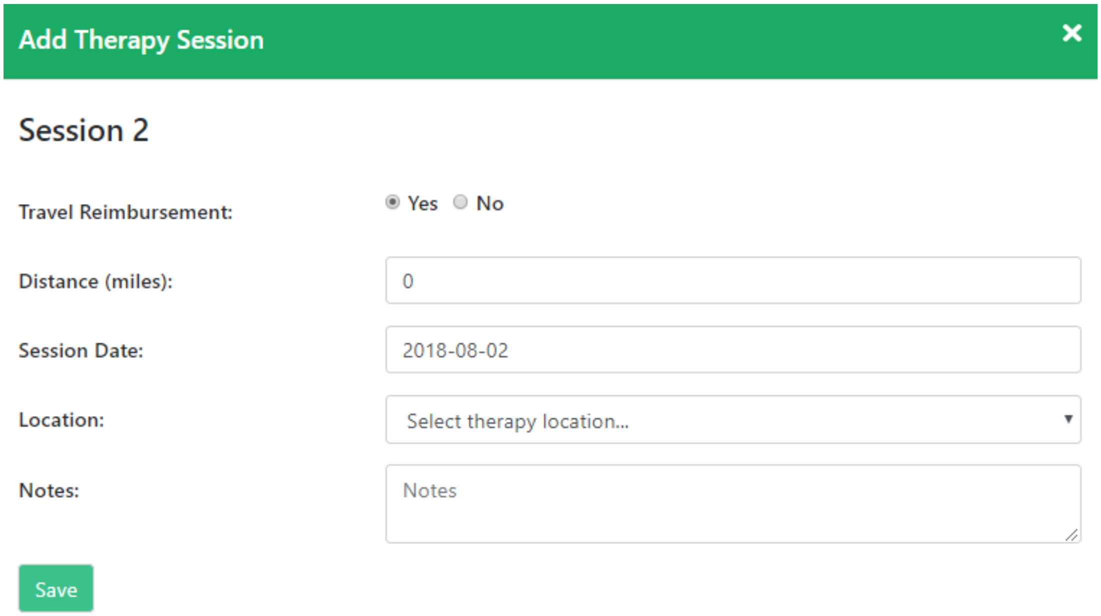
3.3 Entering Therapy Sessions into ARMS

a. Click on the "Referrals" menu button and all of the referrals assigned to you will appear.
b. Click on the "Status" and select Active. All of the active referrals that you have accepted will appear.
c. Find the desired referral number for which you want to enter a session and click on the expand button "+" or "cog" button.



d. To add a new therapy session, click on the "Add Therapy Session" button (arrow #1 above) and a new form will open.
e. The system will present the current date as the session date. If the session was completed earlier, you need to change the date to the actual session date. Click on the Session Date block and a calendar will appear. Click on the actual session date and the Session Date block will be changed to reflect the correct date.
f. If "Yes" is checked for travel reimbursement, a new field will become visible for adding the distance in miles. The therapist needs to enter an estimate of the miles traveled. SWFBC currently uses a flat rate for travel reimbursement. The mileage information field is included for potential future use.
g. Select the location of the session from the drop down options. If for the Location field, "Other" is selected from the drop down, a new field becomes visible where a custom location can be entered.
h. Once the form is completed, click on SAVE and the session will be added to the database.

Note: The "Add Therapy Session" button will be available only if the assigned therapist has accepted the referral.



i. The third column of the list of sessions for a specific referral is titled “Status”. The default mode of this column is “Completed” because the system assumes that the therapist has entered in a completed session.
   a. The therapist can also enter sessions that are scheduled in the future. In that case, the scheduled date for a future session is entered. The therapist must also click on the “edit” button under the “Action” column and change the Status of the scheduled sessions from “Completed” to “Scheduled”.

j. It is possible to edit a therapy session by using the edit button under the “Action” column.
   a. When the edit button is clicked, a form is opened and the data can be edited.

k. If the Client does not show up for a scheduled session, the therapist needs to add that session into the system and then edit the Status of the session. The Status needs to be changed from the default condition” Completed” to “Cancelled”.

l. When a SIQ assessment is administered at a session, the SIQ score must be added to the data base. Click on the button “Add” (arrow 3 above) in the SIQ column. Enter the SIQ score.
If the SIQ score was added to a specific session in error, it can be deleted. When clicking the delete button for an inserted SIQ, a popup confirmation dialog will open to confirm the action. After clicking on “Yes” the SIQ will be removed.

Status	Therapist	SIQ score	Session Location
scheduled	Cosmin Therapist	87	School Office

Delete SIQ ✕

Are you sure you want to remove this siq?

Yes

m. Normally, each Referral is limited to 8 sessions. However, additional sessions will be approved based on the Therapist's judgement relative to need. After 8 sessions have been completed, the therapist may request more sessions by clicking on the "Request extra sessions" button (arrow #4 below).

● Referral No. 76(active)

QRS
Cosmin QRS
755923423
civanqrs@saguaronet.ro

Update referral status
Status

Child
♂ Cosmin
Arapahoe Ridge Alternative HS / BVSD
School Level: Middle School / 6
Age: 12
Ethnicity: Eastern European
Preferred language: english
Parent Authorization: QRS has received written approval from a parent or legal guardian to pursue therapy sessions
The family has no insurance

Risk
Risk Assessment Performed: ✕
Risk Assessment: Information regarding the risk

Therapy
Cosmin Therapist
+ Request extra sessions
4

Session	Session Date	Status	Therapist	SIQ score	Session Location	Distance	Notes	Actions
Session 1	2018-09-11	completed	Cosmin Therapist	50	School Office	2.00		
Session 2	2018-09-11	completed	Cosmin Therapist	Add	School Office	-		
Session 3	2018-09-11	completed	Cosmin Therapist	Add	School Office	2.00		
Session 4	2018-09-11	completed	Cosmin Therapist	Add	School Office	2.00		
Session 5	2018-09-11	completed	Cosmin Therapist	Add	School Office	2.00		
Session 6	2018-09-11	completed	Cosmin Therapist	Add	School Office	2.00		
Session 7	2018-09-11	completed	Cosmin Therapist	Add	School Office	2.00		
Session 8	2018-09-11	completed	Cosmin Therapist	Add	School Office	2.00		

When requesting extra sessions, a number of required sessions and a risk reason must be provided in the request. When the "Other" option is selected from the drop-down menu, a custom reason block will become visible where a custom reason can be added. The request will be approved automatically. The system will automatically send a notice to the SWFBC Executive Director that additional sessions have been authorized. The Executive Director may contact the Therapist to better understand the situation.

Request Additional Therapy Sessions ✕

Number of sessions: 2

Risk: Still indicating a suicide risk

Save

Note: After adding the extra therapy session to the system, the process can be repeated in case more sessions are required.

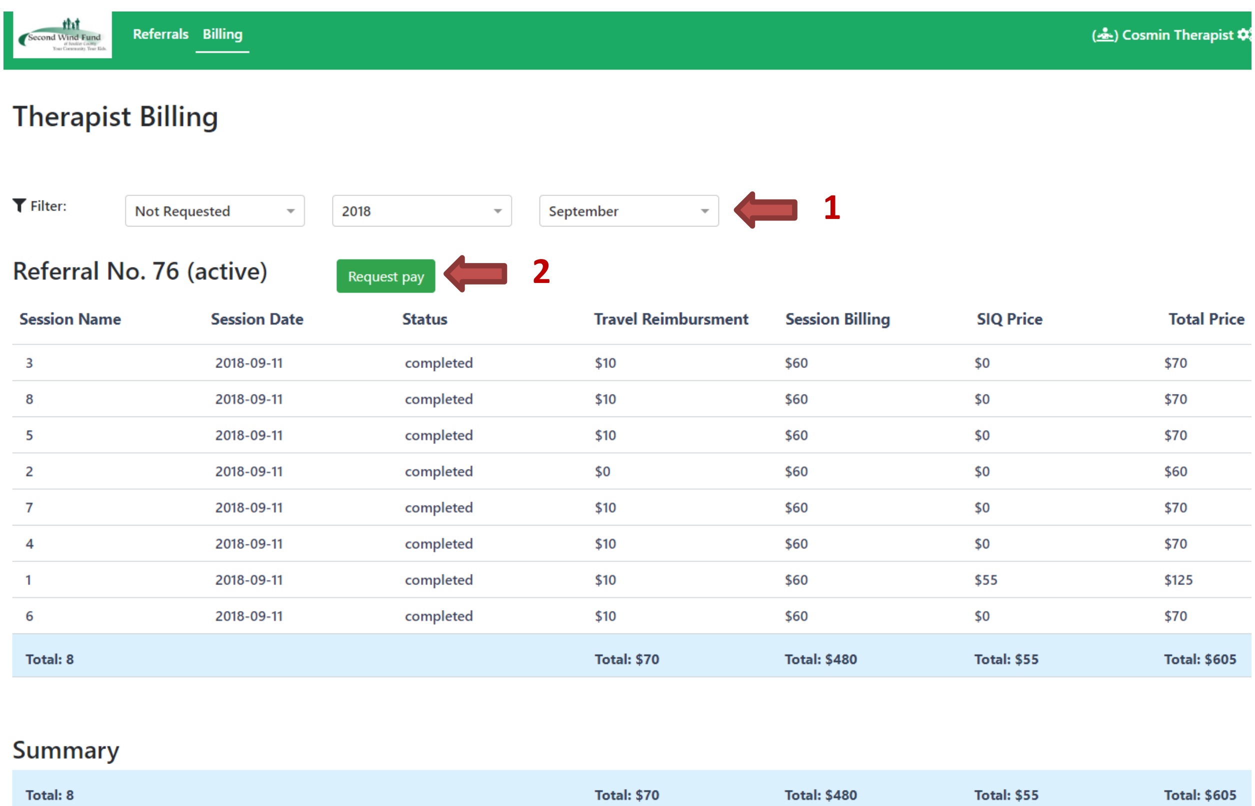
3.4 Updating Referral Status

When the Therapist determines that the work with a specific client is completed, the therapist must change the Status of the specific Referral from “Active” to “Completed”. Go to the Detailed Referral information for the specific Referral by selecting the expansion function (“+”) under the Actions column. At the left side of the screen, “Update Referral Status” appears. Click on the block below this statement which reads “Status”. A dropdown appears with the word “Complete”. Click on “Complete” and the status of the Referral will be changed from “Active” to “Complete”.

3.5 Billing Process

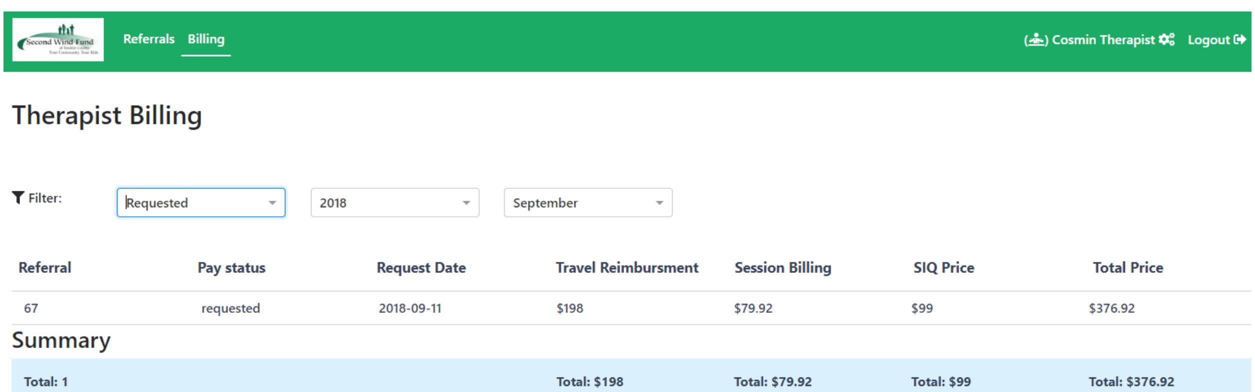
This module enables Therapists to submit billing claims for sessions that have been completed. It also provides each therapist with a view of sessions completed that have not been billed, sessions that have been billed but not yet paid and sessions that have been billed and paid.

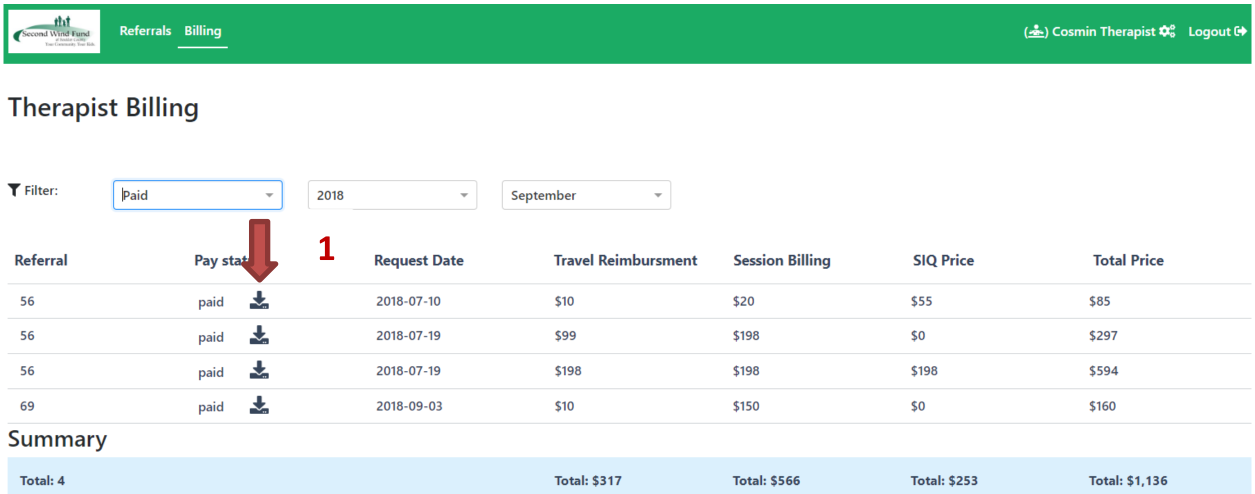
Click on the “Billing” menu button (top left of the screen) to get to this view.



Session Name	Session Date	Status	Travel Reimbursment	Session Billing	SIQ Price	Total Price
3	2018-09-11	completed	$10	$60	$0	$70
8	2018-09-11	completed	$10	$60	$0	$70
5	2018-09-11	completed	$10	$60	$0	$70
2	2018-09-11	completed	$0	$60	$0	$60
7	2018-09-11	completed	$10	$60	$0	$70
4	2018-09-11	completed	$10	$60	$0	$70
1	2018-09-11	completed	$10	$60	$55	$125
6	2018-09-11	completed	$10	$60	$0	$70
Total: 8			Total: $70	Total: $480	Total: $55	Total: $605

1. Billings can be filtered by three criteria: Billing Status, Year and Month
   a. The possible values for Billing Status are: Not Requested, Requested, Paid and Declined. Based on the selection, the table structure will change accordingly.
      i. If “Not Requested” is selected, all of the sessions that the therapist has completed but not yet billed SWFBC for will be presented.
      ii. If “Requested” is selected, all of the sessions that the Therapist has billed but have not yet been paid for will be presented.
      iii. If “Paid” is selected, all of the sessions that SWFBC has paid the Therapist for will be displayed.
      iv. If “Declined” is selected, any billed sessions that SWFBC has declined to pay are listed.
   b. The years category applies to the year in which the session was completed. The default value is the current year.
   c. It is possible to select any month in a year. There is also an option to see the entries for the entire year by selecting “All”. The default value is the current month.
2. When the “Not Requested” filter is selected, all of the completed but not biiled sessions will appear. Also, a button “Request pay” appears for each Referral with sessions for which payment has not been requested yet will appear. When it is clicked, a new payment request is generated in the system. The session(s) for which the request has been made will no longer be visible in the “Not Requested” view. It (they) will appear when the “Requested” option is selected in the filter.
3. There is no limitation to requesting multiple payments for the same referral (different sessions) in the same month. It is recommended that payment be requested for each session as it is completed.





Referral	Pay stat	Request Date	Travel Reimbursment	Session Billing	SIQ Price	Total Price
56	paid	2018-07-10	$10	$20	$55	$85
56	paid	2018-07-19	$99	$198	$0	$297
56	paid	2018-07-19	$198	$198	$198	$594
69	paid	2018-09-03	$10	$150	$0	$160
Total: 4			Total: $317	Total: $566	Total: $253	Total: $1,136

1. To obtain a claims form which will include the applicable session information and the SWFBC check amount and check number, click the download button (arrow #1 above) for the desired referral and a pdf will be sent to your download file. It can be stored digitally or can be printed for your records. The Claims form, which is similar to the form that has been used for requesting payments using the manual system, contains the billing information, the amount paid and the SWFBC check number.