

ForwardHealth Partner Portal

October 14, 2016

User Guide

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1 Introduction

1.1 Introduction

This User Guide explains how to navigate and use the public and secure areas of the Partner area of the Portal.

The public Partner area of the ForwardHealth Portal provides users with online functionality and the ability to access real-time information.

Depending on the partner role under which the user is logged in, users will have differing functions available to them.

1.2 Purpose

The purpose of this document is to present users with an overview of the components that make up the Partner area of the Portal, provide instruction on how to navigate and perform basic functions within the system.

1.3 Key Terms and Concepts

1.3.1 ForwardHealth

ForwardHealth brings together many state health care programs with the goal of creating efficiencies for providers and other stakeholders while improving health care outcomes for enrolled members. These programs include the following:

- BadgerCare Plus
- Wisconsin AIDS/HIV Drug Assistance Program (ADAP)
- Wisconsin Medicaid, including Family Planning Only Services
- Wisconsin Well Woman Program (WWWP)
- Wisconsin Well Woman Medicaid (WWWMA)
- SeniorCare
- Wisconsin Chronic Disease Program (WCDP)
- BadgerCare Plus and Medicaid managed care programs

1.3.2 Key Terms

- *Member* — A member represents an individual enrolled in any of the ForwardHealth health care programs.
- *Member ID* — All members are assigned an identification number. The number is assigned from the Master Client Index (MCI) and does not include the Social Security number. The MCI ID is an identification number used for all state government programs in which the member is enrolled.
- *Benefit Plan* — Type of plan that designates the benefits covered and is based on the member's medical status code. Members may be enrolled in multiple benefit plans concurrently.
 - Example: SeniorCare and Qualified Medicare Beneficiary (QMB).
 - Example: QMB and Elderly, Blind, and Disabled Medicaid.
- *Enrollment* — Enrollment is used any time a reference is made to a member who is eligible for benefits under any of the ForwardHealth programs. A member may also be enrolled in a managed care program.
- *Case* — There are two types of cases: Medicaid Management Information System (MMIS) cases and Client Assistance Re-Employment and Economic Support System (CARES) cases. A reference to a case is always MMIS unless a CARES case is specifically stated.
- *Fiscal Agent* — HP Enterprise Services is the ForwardHealth fiscal agent.

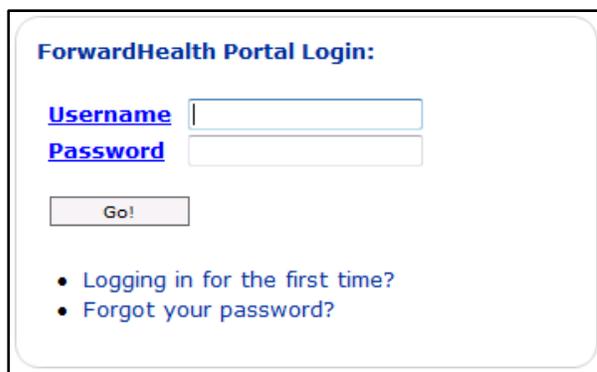
2 Passwords and Security

2.1 General Password Guidelines

- All Portal users can change their password at any time. After logging in, click the **Account** link on the secure Partner home page and then click the **Change Password** link on the Account home page.
- Portal account passwords expire every 60 days, and a message alert will prompt users to change them.
- Passwords *must* have at least *eight* characters.
- Passwords *must* contain at least one *uppercase* letter, one *lowercase* letter, and one *number*.
- Passwords should not contain a real name or the user's name.
- When resetting a password, none of the previous eight passwords can be reused.
- Users who forget their password can reset it by answering the security questions they provided when their initial access was created and temporary password changed.

2.2 ForwardHealth interChange Password Problems

Users can click *Forgot your password?* in the login box to utilize the account maintenance area of the Portal to resolve password issues. (See [Section 5.3 Resetting Passwords](#).) If unable to resolve a password problem using the reset password function, users may call the Portal Helpdesk at (866) 908-1363.



The screenshot shows a login form titled "ForwardHealth Portal Login:". It contains two input fields: "Username" and "Password". Below the fields is a "Go!" button. At the bottom of the form, there are two links: "Logging in for the first time?" and "Forgot your password?".

Figure 1 ForwardHealth Portal Login

3 Getting Started

1. Access the ForwardHealth Portal at <https://www.forwardhealth.wi.gov/>. The public Portal home page will be displayed.



Figure 2 ForwardHealth Public Portal Home Page

The ForwardHealth Portal is divided into five main areas as indicated by the five icons in the middle of the page. Users can click the Partners icon or the link below to go to public Partner area of the Portal. Once a username has been assigned to a user, the Login link on the home page can be used to go directly to the secure Partner Home page.

2. Click **Partners**. The public Partner home page will be displayed.

wisconsin.gov home state agencies subject directory department of health services

ForwardHealth
Wisconsin serving you

interChange
Partner

Welcome » October 11, 2011 2:06 PM [Login](#)

The Partner site is specifically designed to provide up-to-date ForwardHealth information and functionality specific to the following partners:

- Income Maintenance Workers/Coordinators
- Katie Beckett Program staff
- FosterCare and Subsidized Adoption workers
- Managed Care Organization Enrollment Brokers
- Child Support staff
- Wisconsin Well Woman Program Local Coordinating Agencies (LCAs)
- Social Security Administration (SSA)
- Aging and Disability Resource Centers (ADRCs)
- Subrogation workers
- Women, Infants, and Children (WIC) workers
- Wisconsin Department of Justice
- MetaStar
- Wisconsin Division of Juvenile Corrections

Partners should log in to the secure Partner Portal using the login area to the right on this page. The secure Partner Portal is designed to provide functions to each partner specific to the partner's relationship to the Department of Health Services and the various ForwardHealth programs as appropriate.

Accessing the Secure Partner Site

Many partner users were emailed their login information during October 2008. If you received your login information, you do not need to request access and can immediately enter your login information in the "Login to Secure Site" area to the right.

If you did not receive your login information in October 2008, you will need to request access by clicking the link below and completing the necessary request information.

[Request Secure Partner Site](#) ←

Find a Provider

Search for providers by different criteria such as county, city, state and zip code.

Related Programs and Services

Use related programs & services to access information for all ForwardHealth programs as well as other programs and services. [Go >](#)

Member Resources

Use Member Resources to access information and resources specific to members of ForwardHealth programs.

- [Member Information](#)
- [Member Contacts](#)
- [Medicaid Brochures/Fact Sheets/Updates](#)
- [Privacy Notices](#)

Trainings

Use Trainings to view up-to-date training offerings for your specialty or interest and then register for courses via the web. [Go >](#)

[About](#) | [Contact](#) | [Disclaimer](#) | [Privacy Notice](#)
Wisconsin Department of Health Services

Figure 3 Public Partner Home Page

This screen provides links to public information that can be accessed by all users, such as requesting access to the secure site, finding a provider, and accessing contact information for members interested in applying for ForwardHealth program benefits.

3.1 Requesting Secure Partner Site Access

1. On the public Partner home page, scroll down to the “Accessing the Secure Partner Site” section.
2. Click **Request Secure Partner Site**. The Portal Access Choose Request Type page will be displayed.

Note: The *Request Portal Access* link in the Quick Links menu can also be used to request access to the secure site.

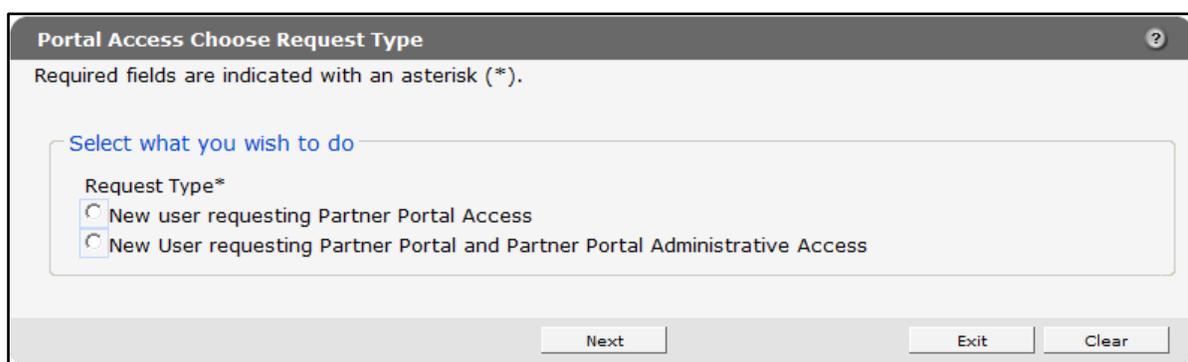


Figure 4 Portal Access Choose Request Type Page.

From this page, users may choose one of two options.

- New user requesting Partner Portal access.
- New user requesting Partner Portal and Partner Portal Administrative Access.

3.1.1 New User Requesting Partner Portal Access

Note: If you also wish to request administrative access, go to [Section 3.1.2 New User Requesting Partner Portal and Partner Portal Administrative Access](#).

1. Check the New user requesting Partner Portal Access radio button.

2. Click **Next**. The Portal Access Request Information panel will be displayed.

Portal Access Request Information ?

Required fields are indicated with an asterisk (*).

- Requested User ID must be Alphanumeric.
- Requested User ID can not begin with a number.
- Requested User ID must be at least 6 characters in length.
- Requested User ID can not be greater than 20 characters.

User Information

First Name*

Last Name*

E-Mail Address*

Confirm E-Mail*

Requested User ID*

Work Phone Number* Ext.

Role*

Date Requested

Security Agreement

The user understands that the Portal Access User Account Agreement (hereinafter "Agreement"), effective today, is made by and between the State of Wisconsin Department of Health Services ("DHS") and users who sign up for an account on this website (hereinafter "User").

WHEREAS, User renders certain professional health care services ("Services") to ForwardHealth members, and submits documentation of those Services to DHS; and,

WHEREAS, DHS, in its implementation of the ForwardHealth program in Wisconsin, provides a System of operational and informational support to respond to User inquiries to exchange certain data, claims, and billing information through electronic communications and through the Internet

Please check the box if you have read and agreed to Wisconsin's User Security Agreement.

Previous Next Exit Clear

Figure 5 Portal Access Request Information Panel

3. Enter the required information. Note that all fields are required. The Date Requested field defaults to the current date.
4. Read the Security Agreement and check the security agreement checkbox.

- Click **Next**. The Portal Access Additional Information panel will be displayed.

Figure 6 Portal Access Additional Information Panel

The financial payers associated with the requested role will be checked.

- Select your certifying agency code using the drop-down menu at the top of the panel.
- Click **Next**.
 - If the organization does not have associated Data Support System (DSS) universe access, the Portal Access Secret Questions page will be displayed. Proceed to [step 13](#).
 - If the organization has associated DSS universe access, the Portal Access DSS Universe Request page will be displayed.

Figure 7 Portal Access DSS Universe Request page

- Select a universe using the drop-down menu in the **Universe** field.

- Click anywhere on the panel. The page will refresh and one or more checkboxes will be displayed that allow you to select the universe control items you wish to request.

Figure 8 Universe Control Item Selections

- Check the checkbox for each item you wish to select.
- Click **Save**. The page will refresh and the requested universe will appear at the top of the panel.

Figure 9 Requested Universe Added

Repeat steps 8-11 for each universe you wish to request.

- After adding all the desired universes, click **Next**. The Portal Access Secret Questions page will be displayed.

Figure 10 Portal Access Secret Questions Page

- Create a password that you will use to log on to the Portal according to the guidelines in [Section 2.1 ForwardHealth General Password Guidelines](#). Retype the password to confirm it is correct.
- Select four security questions and provide answers that you can use to reset a lost password.
- Click **Submit**.

If the submission is successful, the following message will be displayed.

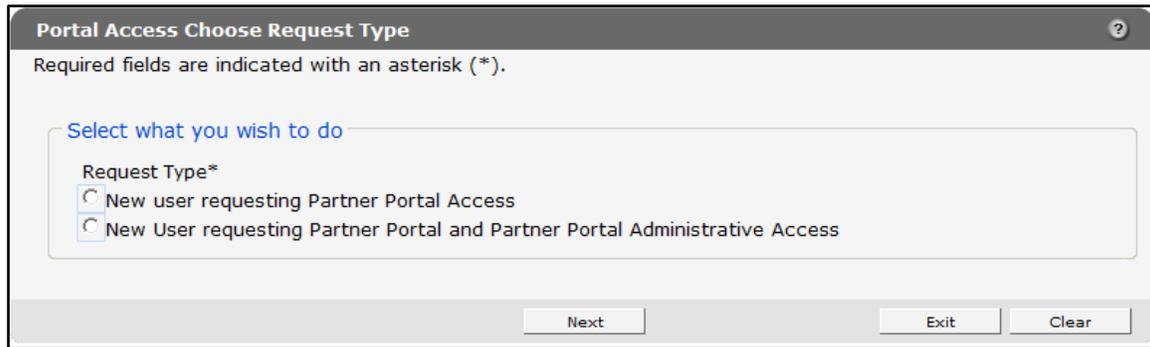
Figure 11 Submission Confirmation

If there was a problem with the submission, an error message will be displayed indicating what corrections need to be made.

3.1.2 New User Requesting Partner Portal and Partner Portal Administrative Access

- On the public Partner home page, scroll down to the “Accessing the Secure Partner Site” section.

2. Click **Request Secure Partner Site**. The Portal Access Choose Request Type page will be displayed.



Portal Access Choose Request Type ?

Required fields are indicated with an asterisk (*).

[Select what you wish to do](#)

Request Type*

New user requesting Partner Portal Access

New User requesting Partner Portal and Partner Portal Administrative Access

Next Exit Clear

Figure 12 Portal Access Choose Request Type Page

3. Check the New user requesting Partner Portal and Partner Portal Administrative Access checkbox.

- Click **Next**. The Portal Access Request Information page will be displayed.

Portal Access Request Information ?

Required fields are indicated with an asterisk (*).

- Requested User ID must be Alphanumeric.
- Requested User ID can not begin with a number.
- Requested User ID must be at least 6 characters in length.
- Requested User ID can not be greater than 20 characters.

User Information

First Name*

Last Name*

E-Mail Address*

Confirm E-Mail*

Requested User ID*

Work Phone Number* Ext.

Role*

Date Requested

Security Agreement

The User understands that the Portal Access User Account Agreement (hereinafter "Agreement"), effective today, is made by and between the State of Wisconsin Department of Health Services ("DHS") and users who sign up for an account on this website (hereinafter "User").

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WHEREAS, DHS, in its implementation of the ForwardHealth program in Wisconsin, provides a System of operational and informational support to respond to User inquiries to exchange certain data, claims, and billing information through electronic communications and through the Internet

Please check the box if you have read and agreed to Wisconsin's User Security Agreement.

Previous Next Exit Clear

Figure 13 Portal Access Request Information Page

- Enter the required information. Note that all fields are required. The Date Requested field defaults to the current date.

6. Read the Security Agreement and check the security agreement checkbox.
7. Click **Next**. The Portal Access Additional Information panel will be displayed.

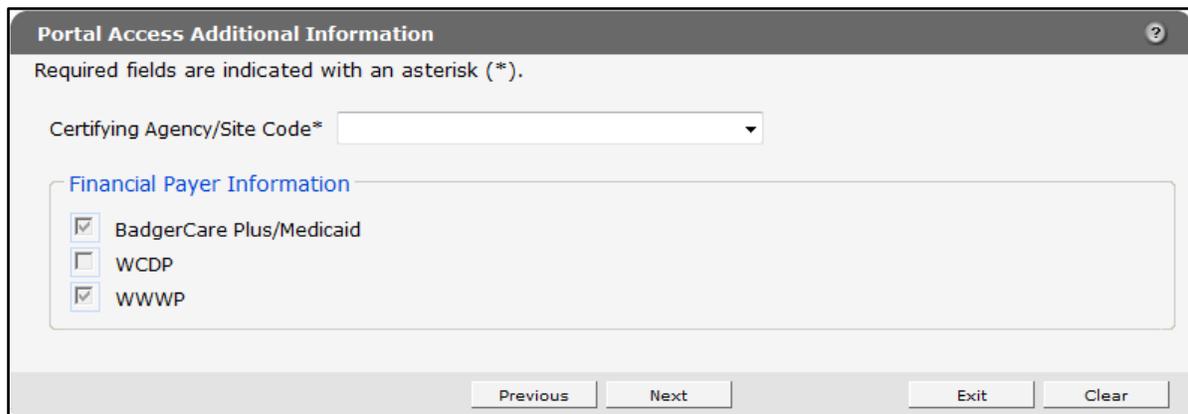


Figure 14 Portal Access Additional Information Panel

The financial payers associated with the requested role will be checked.

8. Select your certifying agency code using the drop-down menu at the top of the panel.
9. Click **Next**. The Portal Access Admin Information page will be displayed.

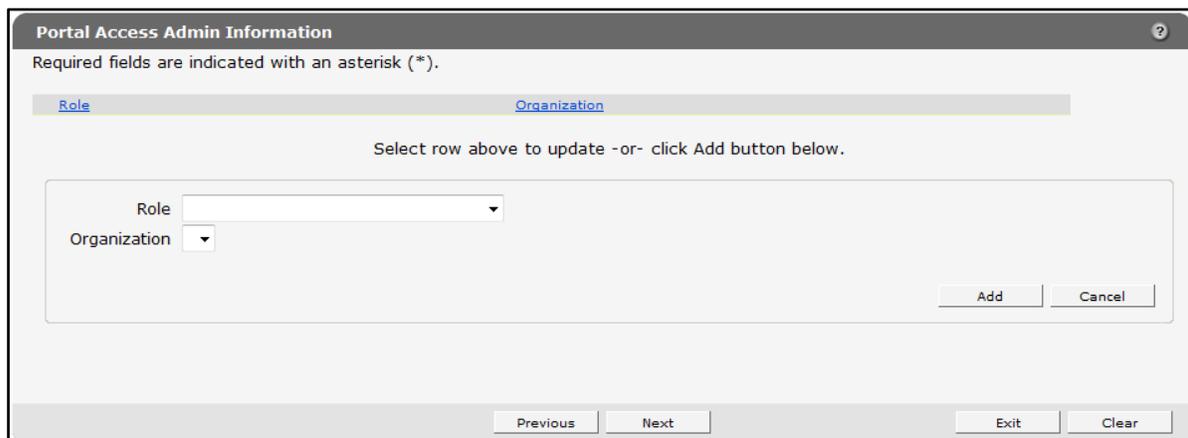


Figure 15 Portal Access Admin Information Page

10. Select a role using the drop-down menu in the Role field. The page will refresh and the Organization drop-down field will populate with the organizations related to the selected role.
11. Select an organization using the drop-down menu in the Organization field.

12. Click **Add**. The selected role and organization will be added to the top of the panel.

The screenshot shows a window titled "Portal Access Admin Information" with a help icon in the top right. Below the title bar, it states "Required fields are indicated with an asterisk (*)." There is a table with two columns: "Role" and "Organization". The first row contains "County IM Worker - Coordinator" and "001-00-Adams County DSS". Below the table, the text reads "Select row above to update -or- click Add button below." There are two dropdown menus labeled "Role" and "Organization". At the bottom right of the form area, there are "Add" and "Cancel" buttons. At the very bottom of the window, there are "Previous", "Next", "Exit", and "Clear" buttons.

Figure 16 Portal Access Admin Information Page — Added Role and Organization

Repeat steps 10-12 above to add additional roles if desired.

If you wish to change any information for a role, click the role you wish to revise.

The screenshot shows the same "Portal Access Admin Information" window. The table row "County IM Worker - Coordinator" and "001-00-Adams County DSS" is highlighted in yellow, and a mouse cursor is pointing at it. The text below the table is "Select row above to update -or- click Add button below." The "Role" dropdown menu is now populated with "County IM Worker - Coordinator" and the "Organization" dropdown menu is populated with "001-00-Adams County DSS". At the bottom right of the form area, there are "Delete", "Save", "Add", and "Cancel" buttons. The "Previous", "Next", "Exit", and "Clear" buttons remain at the bottom of the window.

Figure 17 Portal Access Admin Information Page — Selecting a Role to Change or Delete

The panel will populate with the selected role. Use the drop-down menus to make any revisions and click **Save** to save the changes.

You can delete a role by selecting the role and clicking **Delete**.

13. Click **Next** to continue applying for access.

- If the organization does not have associated DSS universe access, the Portal Access Secret Questions page will be displayed. Proceed to [step 19](#).

- If the organization has associated DSS universe access, the Portal Access DSS Universe Request page will be displayed.

Figure 18 Portal Access DSS Universe Request Page

14. Select a universe using the drop-down menu in the Universe field.
15. Click anywhere on the panel. The page will refresh and one or more checkboxes will allow you to select the universe control items you wish to request.

Figure 19 Portal Access Request Information Page — Universe Control Item Selections

16. Check the checkbox for each item you wish to select.

- Click **Save**. The page will refresh and the requested universe will appear at the top of the panel.

Figure 20 Portal Access DSS Universe Request —Universe Added

Repeat steps 14-17 for each universe you will to request.

- After adding all the universes you wish to request, click **Next**. The Portal Access Secret Questions page will be displayed.

Figure 21 Portal Access Secret Questions Page

- Create a password that you will use to log on to the Portal according to the guidelines in [Section 2.1 ForwardHealth General Password Guidelines](#). Retype the password to confirm it is correct.
- Select four security questions and provide answers that you can use to reset a lost password.

21. Click **Submit**. If the submission is successful, the following message will be displayed.

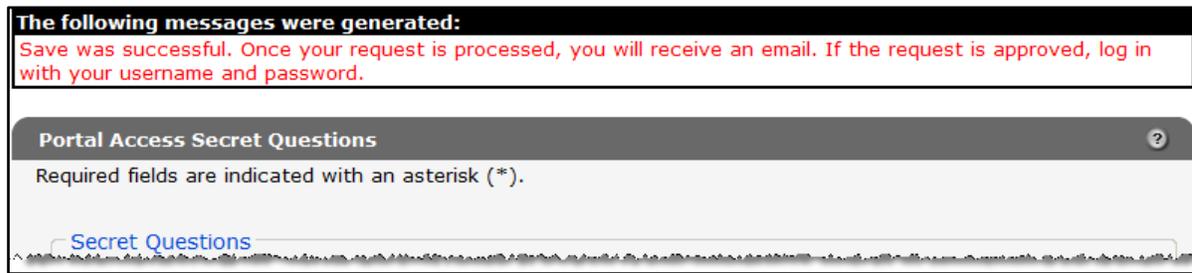


Figure 22 Submission Confirmation

If there was a problem with the submission, an error message will be displayed indicating what corrections need to be made.

4 Logging in to the Secure Partner Area of the Portal

1. Access the Portal home page at <https://www.forwardhealth.wi.gov/>. The Portal home page will be displayed.
2. Click **Login** from the Portal home page. The ForwardHealth Portal Login box will be displayed.
3. Enter your username in the Username field.
4. Enter your password in the Password field.

5. Click **Go**. If you have not already accepted the License for Use of Physicians' Current Procedural Terminology, Fourth Edition (CPT) and Point and Click License for Use of Current Dental Terminology (CDT) agreements, the license agreements page will be displayed.

Note: If you have previously accepted the license agreements, this page will not be displayed. Proceed to [step 7](#).

wisconsin.gov home state agencies subject directory department of health services

ForwardHealth
Wisconsin serving you

Search

Welcome » September 28, 2016 12:09 PM

LICENSE FOR USE OF PHYSICIANS' CURRENT PROCEDURAL TERMINOLOGY, FOURTH EDITION (CPT)

End User Point and Click Agreement:

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CONSEQUENTIAL DAMAGES ARISING OUT OF THE USE OF SUCH INFORMATION OR MATERIAL.

The license granted herein is expressly conditioned upon your acceptance of all terms and conditions contained in this agreement. If the foregoing terms and conditions are acceptable to you, please indicate your agreement by clicking below on the button labeled "I ACCEPT". If you do not agree to the terms and conditions, you may not access or use the software. Instead, you must click below on the button labeled "I DO NOT ACCEPT" and exit from this computer screen.

I Accept
 I Do Not Accept

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Wisconsin Department of Health Services

Figure 23 End User Point and Click License Agreements

6. Click the radio button next to "I Accept." Click **Submit Agreement**.

Note: If "I Do Not Accept" is selected, you will be returned to the ForwardHealth Portal home page and will not be able to access the secure Partner Portal.

7. The secure Partner home page will be displayed.



Figure 24 ForwardHealth Secure Partner Home Page

Note: Your secure home page may display differently, depending on the partner role used to log in.

4.1 ForwardHealth Partner Home Page

4.1.1 Main Menu Button

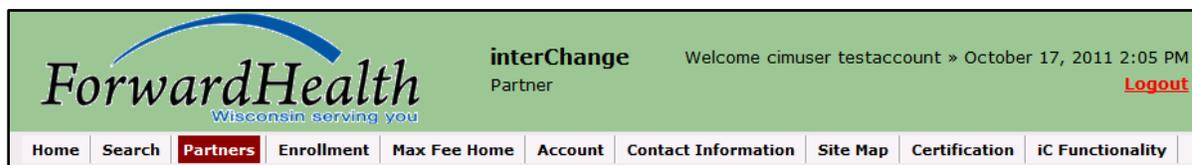


Figure 25 Main Menu Buttons

Based on the partner role with which you are logged in, the secure Partner Portal main menu may consist of some or all of the following menu buttons displayed at the top of the page:

- *Home* — Displays the Portal home page.
- *Search* — Allows users to search for information within the Portal.

- *Partners* — Links to your secure Portal home page.
- *Enrollment* — Allows users to search for a member’s summary enrollment data. Users should refer to the Enrollment Verification User Guide for additional information.
- *Max Fee Home* — Links to the maximum allowable fee schedules.
- *Claims* — Contains links to the WWWP Reporting Form Search and other user guides.
- *Account* — Allows users to update the information associated with their username and password. Users can set up, update, and maintain account login credentials and read and manage account messages, such as email.
- *Contact Information* — Contains Portal Help Desk contact information and allows users to submit questions about the Portal.
- *Site Map* — Contains shortcut links to the main topics in the Partner area of the Portal.
- *iC Functionality* — Allows users to access detailed information from interChange. Users should refer to their interChange Functionality User Guide for additional information.

A red highlighted button indicates the current area of the Portal being displayed.

4.1.2 Navigation Map

Many Portal pages include a navigation map consisting of a series of links to previously viewed pages. The navigation map is displayed next to the Portal icon.

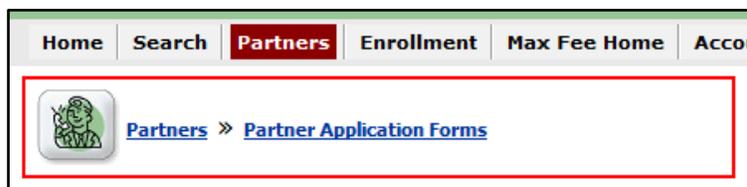


Figure 26 Portal Navigation Map

In the panel above, the links track the path taken to reach the current page. Click any of the displayed links to return to the specific page. For more information on Portal Navigation, see [Section 5.5 Portal Navigation](#).

Important: The browser’s Back button *cannot* be used to navigate back within the Portal. The main menu buttons at the top of the page, the quick links on the secure home page, and the links in the navigation map can be used to return to previously viewed pages.

4.1.3 Quick Links

The Quick Links menu contains links to the following general information:

- *Online Handbooks* — Directs the user to the Online Handbook, which allows providers access to all policy and billing information for Wisconsin Medicaid, BadgerCare Plus, SeniorCare, WWWP, and WCDP in a centralized location.

- *ForwardHealth Updates* — Directs the user to the ForwardHealth Publications page. The first source of provider information, *Updates* announce the latest information on policy and coverage changes, PA submission requirements, claim submission requirements, and training.
- *Electronic Data Interchange* — Directs the user to the ForwardHealth Companion Guides, which provide useful technical information about standards for nationally recognized electronic transactions.
- *Max Fee Schedules* — Opens a window that details maximum allowable fee schedule information and provides Quick Links pertaining to fee schedules.
- *Partner Application Forms* — Links to forms that can be completed online or printed and completed manually.
- *Partner Links* — Links to county sites and other programs and information.
- *Partner Request Access* — Allows partner users to request portal access. Refer to Section 3.1 [Requesting Secure Partner Site Access](#) for additional information.
- *Wisconsin Well Woman Program Policy and Procedure Manual* — Opens a Web page with links to documents that explain the WWWW policy and procedures.

The Quick Links menu may also contain links to other areas of the Portal that are available to the specific partner role under which the user is logged in. User guides and instruction sheets are available for many of these areas.

4.2 Requesting Secure Portal Administrative Access

Current users logged into the secure area of the partner Portal may request administrative access from the secure partner home page.

1. On the secure partner home page, click **Partner Request Access** in the Quick Links menu.

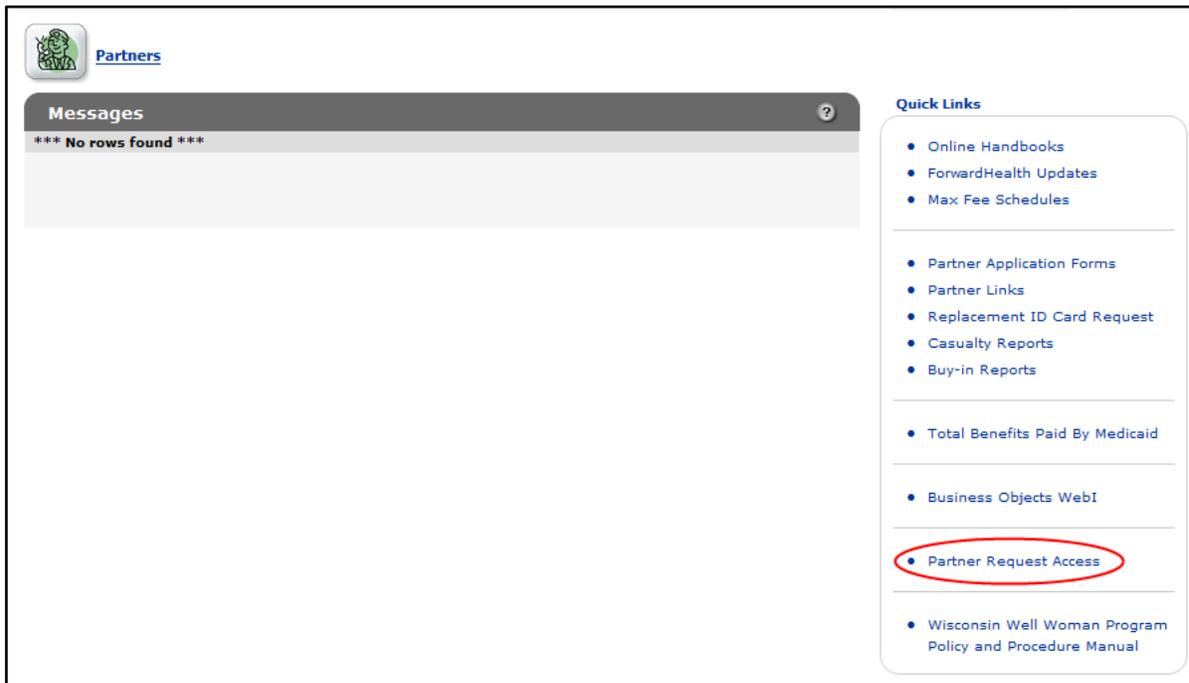


Figure 27 Partner Request Access Link

The Portal Access Choose Request Type page is displayed.

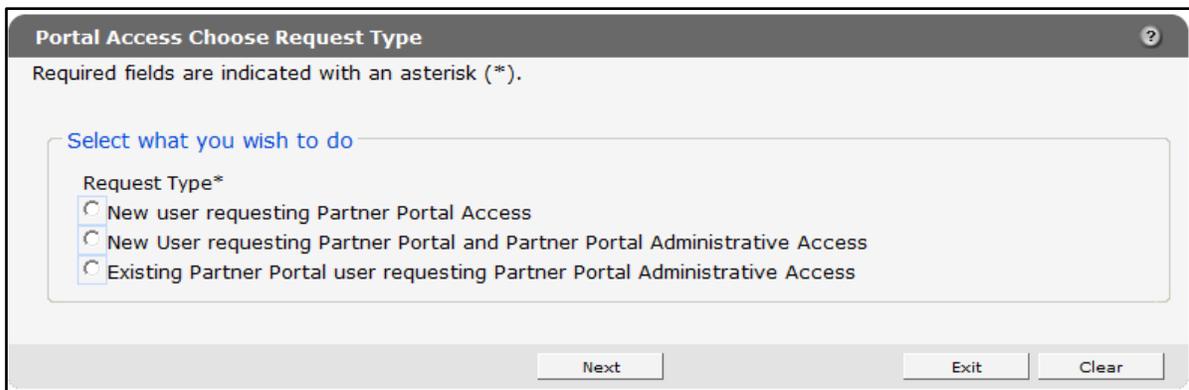
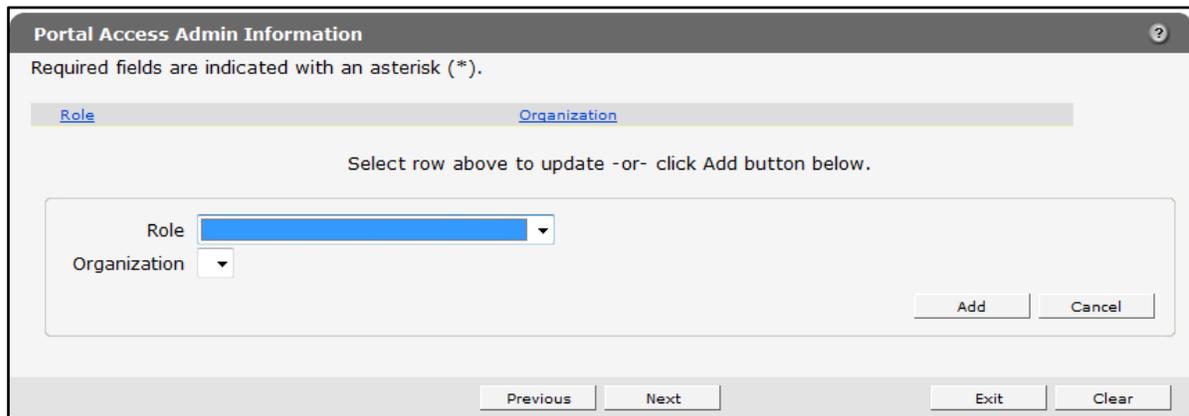


Figure 28 Portal Access Choose Request Type Page

2. Check the checkbox labeled **Existing Partner Portal** user requesting Partner Portal Administrative Access.

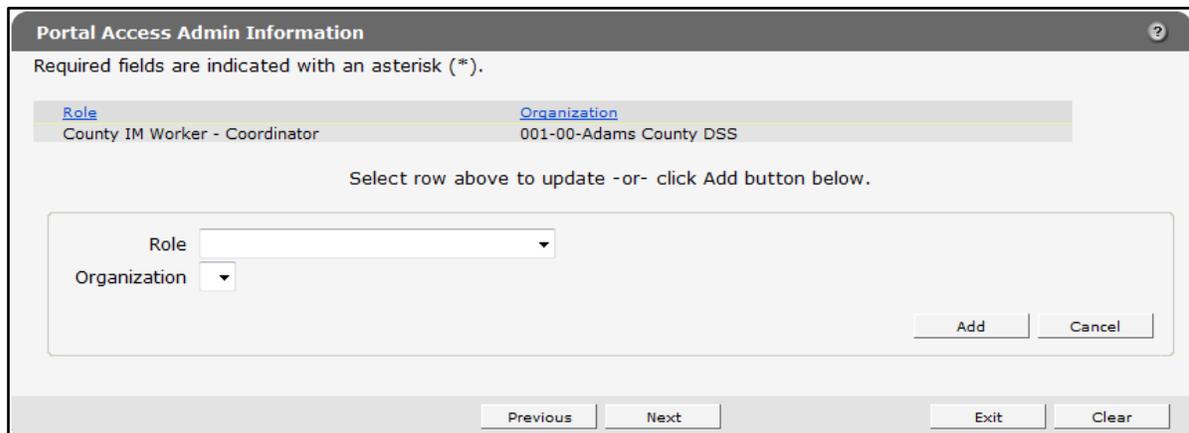
3. Click **Next**. The Portal Access Admin Information page will be displayed.



The screenshot shows a web form titled "Portal Access Admin Information". At the top, it states "Required fields are indicated with an asterisk (*)". Below this, there are two columns of headers: "Role" and "Organization". A message in the center says "Select row above to update -or- click Add button below." Below this message is a form with two dropdown menus: "Role" and "Organization". To the right of these dropdowns are "Add" and "Cancel" buttons. At the bottom of the form are four buttons: "Previous", "Next", "Exit", and "Clear".

Figure 29 Portal Access Admin Information Page

4. Use the drop-down menu in the **Role** field to select a role.
5. Use the drop-down menu in the **Organization** field to select an organization.
6. Click **Add**. The selected role and organization will be added to the top of the panel.



The screenshot shows the same "Portal Access Admin Information" form as in Figure 29, but now with a row added to the table. The row contains "County IM Worker - Coordinator" under the "Role" column and "001-00-Adams County DSS" under the "Organization" column. The "Add" and "Cancel" buttons are still present to the right of the form fields. The "Previous", "Next", "Exit", and "Clear" buttons are at the bottom.

Figure 30 Portal Access Admin Information Page — Added Role and Organization

Repeat steps 4-6 above to add additional roles if desired.

If you wish to change any information for a role, click the role you wish to revise.

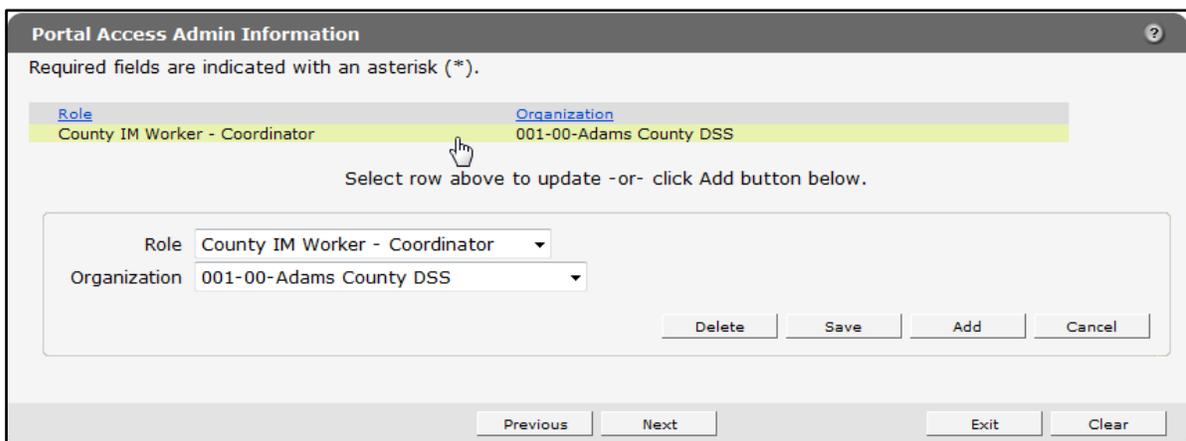


Figure 31 Portal Access Admin Information Page — Selecting a Role to Change or Delete

The panel will populate with the selected role. Use the drop-down menus to make any revisions and click **Save**.

You can delete a role by selecting the role and clicking **Delete**.

7. Click **Next** to continue applying for access. The Portal Access Secret Questions page will be displayed.

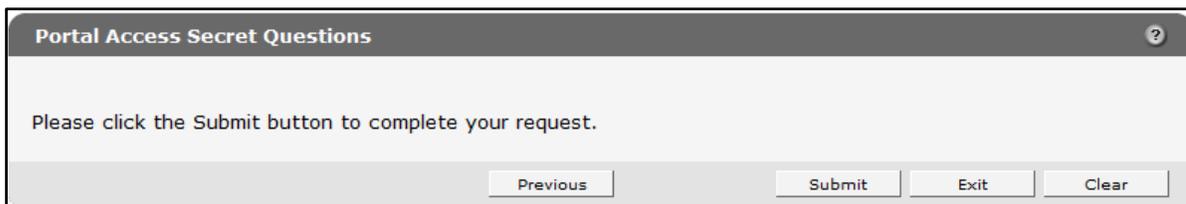


Figure 32 Portal Access Secret Questions Page

8. Logged-in users who have already created their password and security questions do not have to enter any information on this page.
9. Click **Submit**.

If the submission is successful, the following message will be displayed.

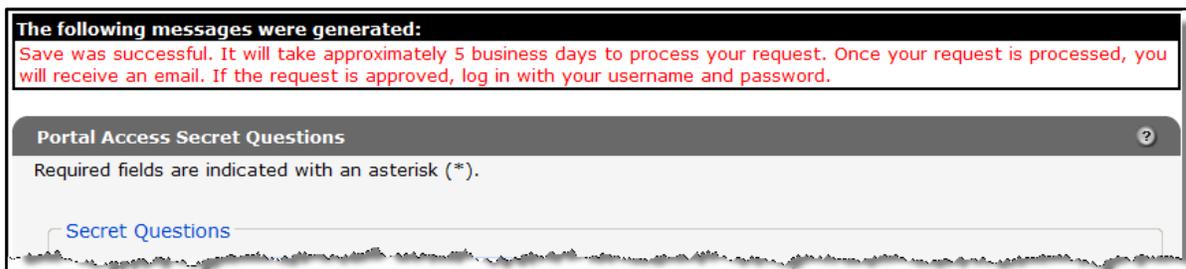


Figure 33 Submission Confirmation

If there was a problem with the submission, an error message will be displayed indicating what corrections need to be made.

4.3 Requesting DSS Universe Access

If your organization has associated DSS universe access there will be a link for Partner DSS Universe Management in the Quick Links menu.

1. Click **Partner DSS Universe Management**.

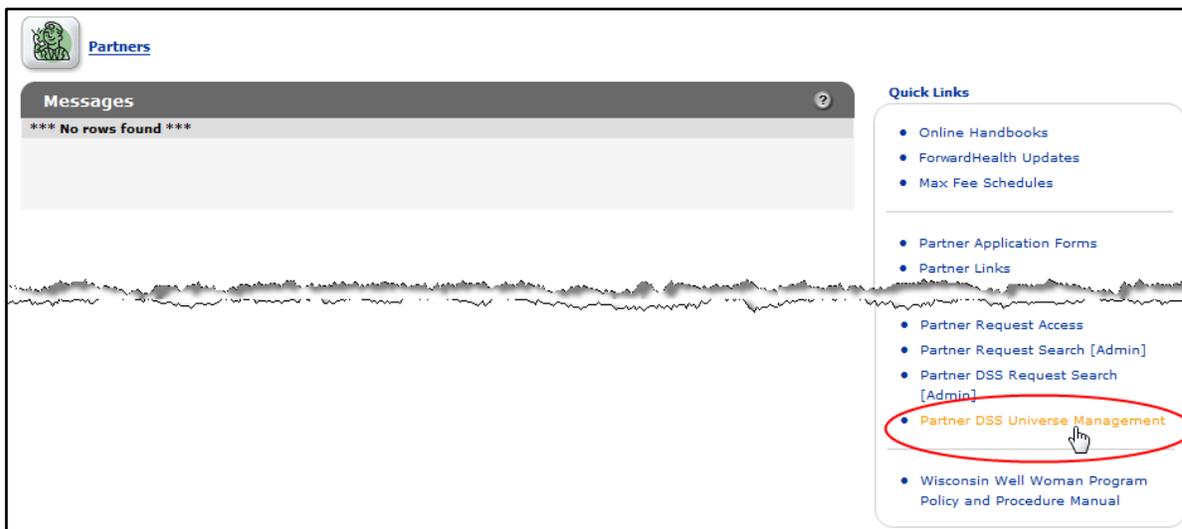


Figure 34 Partner DSS Universe Management Link

The Portal Access Request Information page will be displayed.

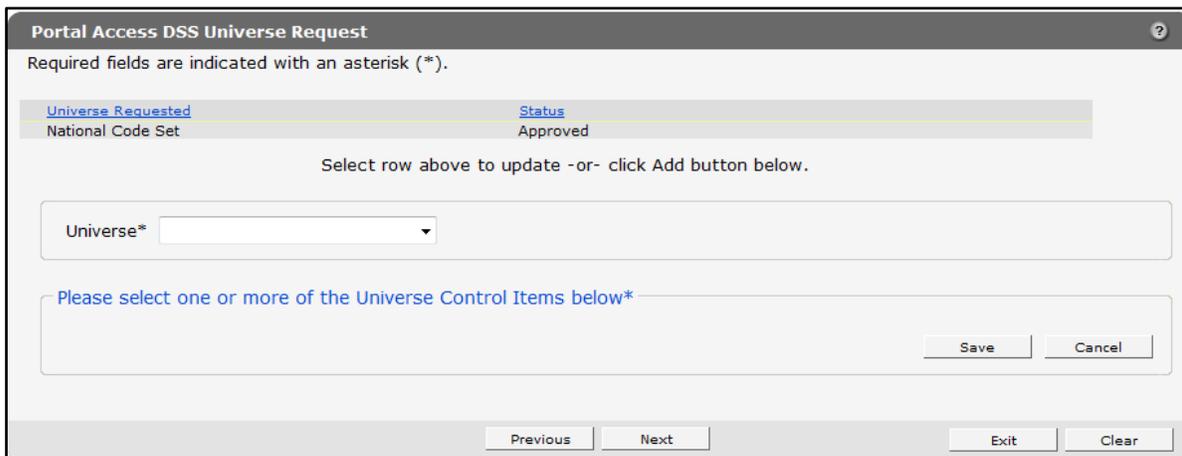


Figure 35 Portal Access DSS Universe Request Page

Logged-in users can use this page to request access to DSS universes. The top of the panel lists any universes already requested or approved, along with the status of the request. The drop-down menu in the Universe field will display the universes applicable to the user’s role and organization.

2. Select a universe using the drop-down menu in the **Universe** field.
3. Click anywhere on the panel. The page will refresh and one or more checkboxes will allow you to select the universe control items you wish to request.

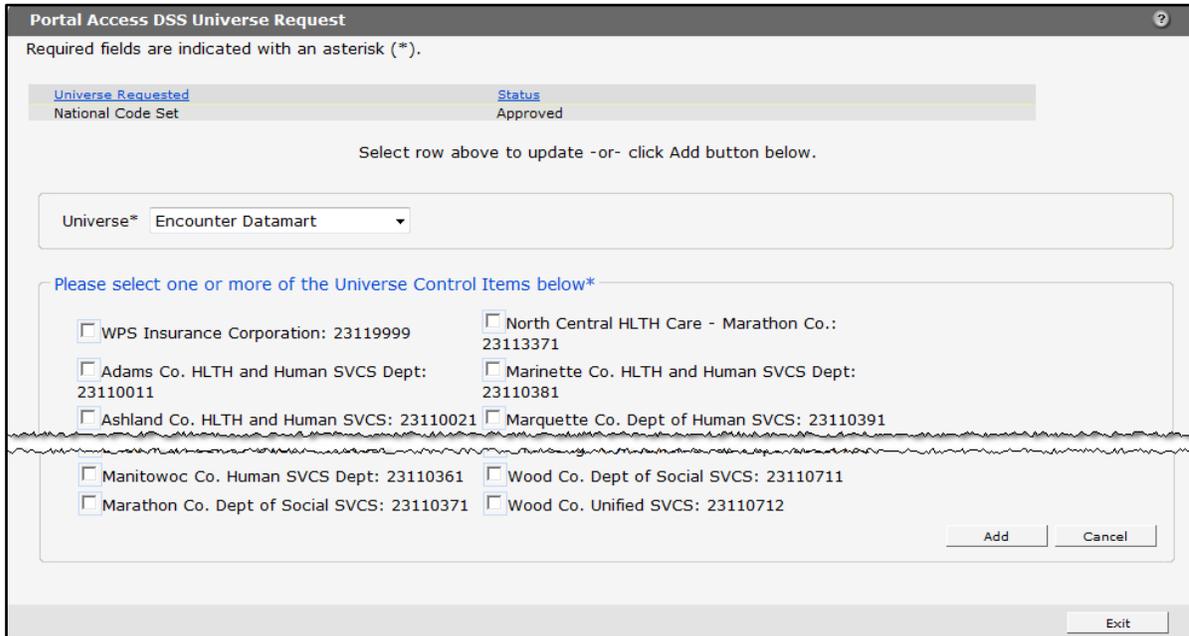


Figure 36 Portal Access DSS Universe Request Page — Universe Control Items

4. Place a check in the checkboxes for the items you wish to access.
5. Click **Add**. The page will refresh and the selected universe will be added to the list.

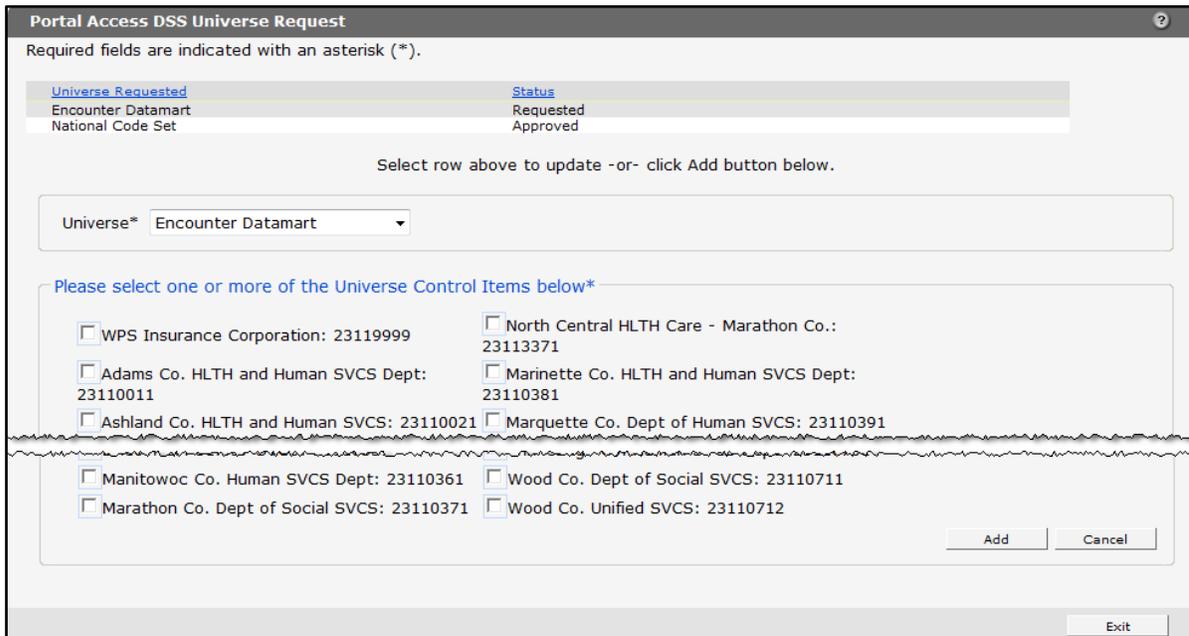


Figure 37 Portal Access DSS Universe Request Page — Universe Added to List

Repeat steps 2-6 for each universe you wish to request.

You will be notified by email when a decision is issued on your request.

6. Click **Exit** to return to the secure Partner home page.

4.4 Partner Request Search [Admin]

Users with Portal administrative access may administer Partner requests using the Partner Request Search function on the secure partner site home page.

To search for a partner request:

1. On the secure Partner home page, click **Partner Request Search [Admin]** in the Quick Links menu.

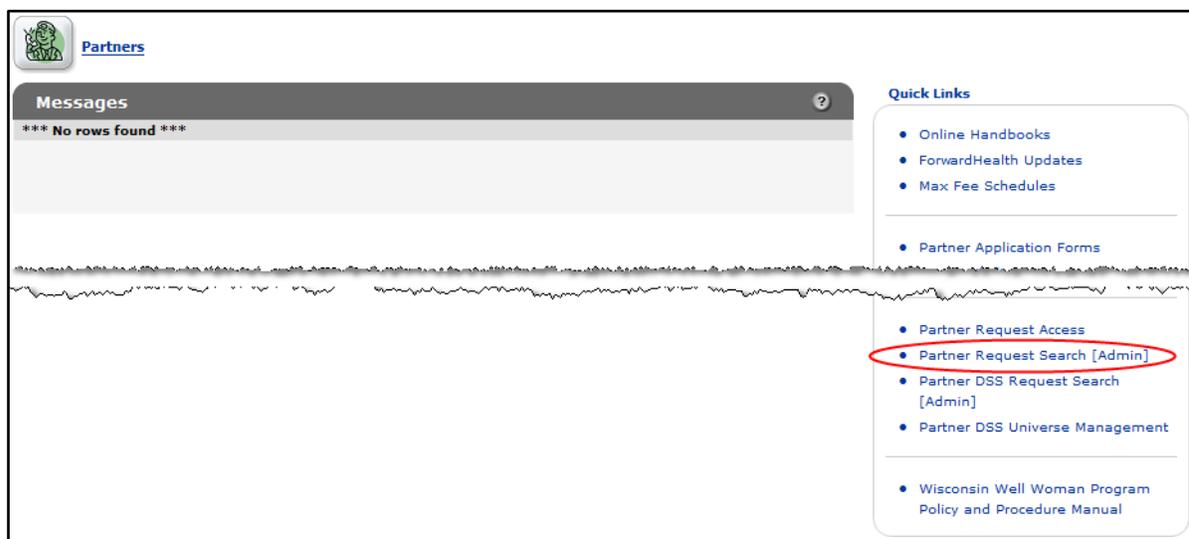


Figure 38 Partner Request Search [Admin] Link

The Portal Access User Request Search page will be displayed.

 A screenshot of the 'Portal Access User Request Search' page. The page has a title bar with a question mark icon. Below the title, it says 'Required fields are indicated with an asterisk (*).'. The search form contains the following fields: 'Role' (a dropdown menu), 'Last Name' (a text input field), 'First Name' (a text input field), 'From Date of Request' (a date input field), 'To Date of Request' (a date input field), and 'Status' (a dropdown menu). At the bottom right of the form are 'Search' and 'Clear' buttons.

Figure 39 Portal Access User Request Search Page

Portal administrators can search using any of the search fields. If a date is used as one of the search criteria, both dates must be entered.

2. Enter your search criteria and click **Search**. The Portal Access User Request Search Results panel will be displayed.

Portal Access User Request Search

Required fields are indicated with an asterisk (*).

Role: From Date of Request:
 Last Name: PARTNER To Date of Request:
 First Name: Status: Requested

Search Results

First Name	Last Name	Requested User ID	Role	Date Requested	Status	Status Date
I M	PARTNER	IMPART	County IM Workers	20111011	Requested	20111011
IM	PARTNERADMIN	PARTADMIN	Division of Quality Assurance	20121119	Requested	20121119
IM	PARTNERADMIN	PARTADMIN	County IM Workers	20121119	Requested	20121119

Figure 40 Portal Access User Request Search Results Panel

3. Click the user whose profile you wish to view. The Request User Profile page for the user will be displayed.

Request User Profile

User Information

First Name: I M Requested User ID: IMPART
 Last Name: PARTNER Date Requested: 10/11/2011
 E-Mail: impartner@partner.com Status: Requested
 Work Phone Number: (608)555-5555 Ext. 5555 Status Date: 10/11/2011
 Role: County IM Workers
 Certifying Agency/Site Code: 000-00-Default Certifying Agency

Figure 41 Request User Profile Page

This page allows Portal administrators to view and manage Portal access requests.

4.4.1 Approving or Denying Access Requests

An email will be sent nightly to all local administrators if there are one or more pending requests for their role/organization. If a request is placed in an “In Work” status, it will not be included in the email.

1. Click the Status drop-down menu to approve or deny the request or indicate that it is still being worked on.

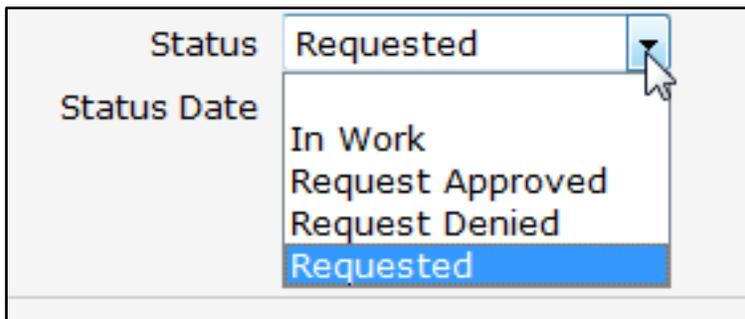


Figure 42 Approve or Deny Request

Note: If you select “Request Denied” you will also need to select a reason for the denial in the Denial Reason drop-down field that will display. This will determine the language for the email sent to the Requestor to notify them of the denial.

2. Click **Save**.

The status field will show the selected status grayed out and a “Save was successful” message will be displayed at the top of the page. If there is a problem with the save, an error message will be displayed here.

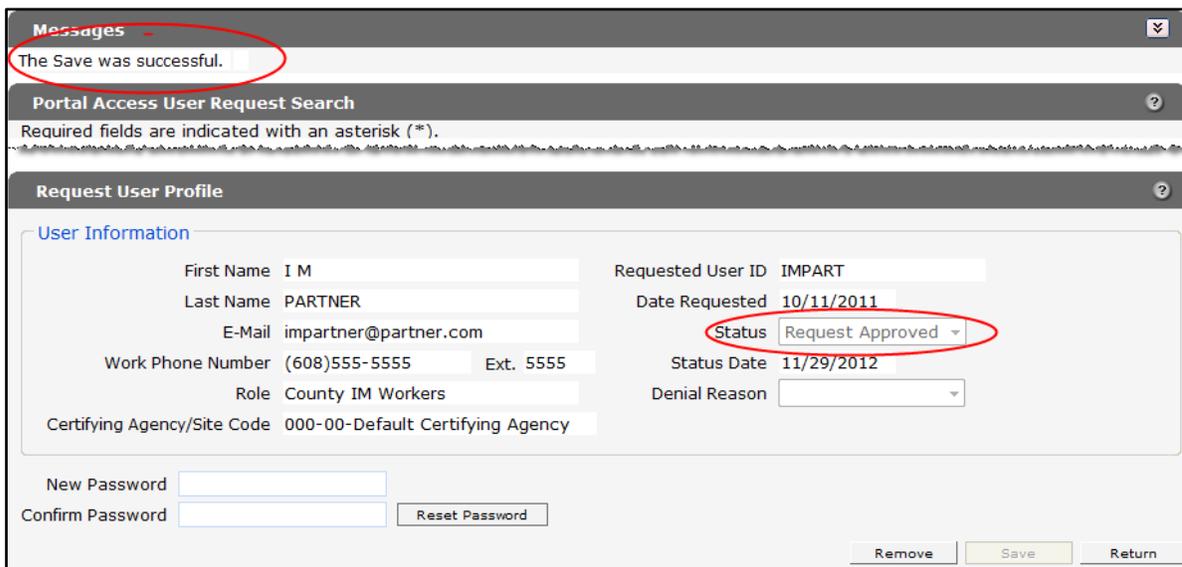


Figure 43 Successful Save

The Remove button can be used to delete a request.

The Return button will close the user profile panel and return you to the search results panel.

4.4.2 Resetting User Passwords

Once a user's access request has been approved, administrators may change the user's password on the Request User Profile page.

To reset a user's password:

1. Search for the user's access request using the above procedures to access the Request User Profile page.

The screenshot shows the 'Request User Profile' page. It contains a 'User Information' section with the following details:

First Name	IM	Requested User ID	PARTADMIN
Last Name	PARTNERADMIN	Date Requested	11/19/2012
E-Mail	partadmin@isp.org	Status	Request Approved
Work Phone Number	(608)555-5555 Ext.	Status Date	11/29/2012
Role	Division of Quality Assurance	Denial Reason	
Certifying Agency/Site Code	001-00-Adams County DSS		

At the bottom of the form, there are two input fields for 'New Password' and 'Confirm Password', a 'Reset Password' button, and three buttons at the bottom right: 'Remove', 'Save', and 'Return'.

Figure 44 Request User Profile Page

The Reset Password fields will be displayed at the bottom of the page.

2. Enter the new password in the **New Password** field.
3. Enter the new password again in the **Confirm Password** field.
4. Click **Save**.

A confirmation message will be displayed at the top of the page. If there is a problem with the password reset, an error message will be displayed here. The Admin will need to inform the user of the temporary password.

The screenshot shows a 'Messages' section with a confirmation message: 'The password was reset successfully'. Below the message is a 'Portal Access User Request Search' section with a note: 'Required fields are indicated with an asterisk (*).'

Figure 45 Password Reset Confirmation Message

4.5 Partner DSS Request Search [Admin]

Users with Portal administrative access may administer partner DSS requests using the Partner DSS Request Search function on the secure partner site home page.

To search for a partner’s DSS request:

1. On the secure partner home page, click **Partner DSS Request Search [Admin]** in the Quick Links menu.



Figure 46 Partner DSS Request Search [Admin] Link

The Portal DSS Access Request Search page will be displayed.

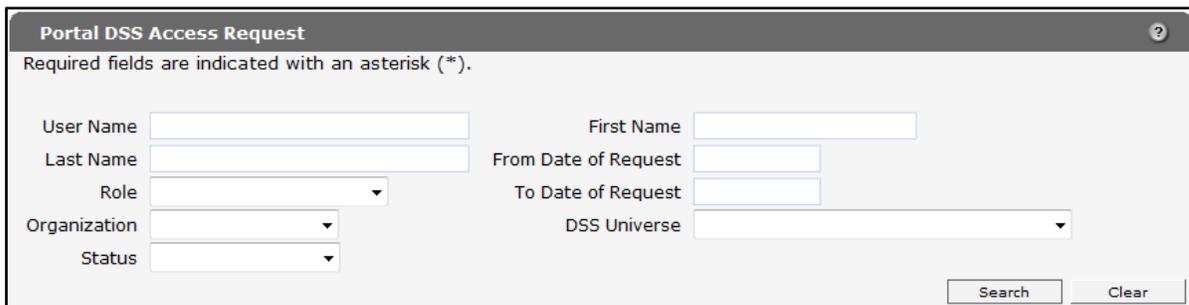


Figure 47 Portal DSS Access Request Search Page

Portal administrators can search using any of the search fields. If a date is used as one of the search criteria, both dates must be entered.

2. Enter your search criteria and click **Search**. The Portal DSS Access Request Search Results page will be displayed.

Portal DSS Access Request

Required fields are indicated with an asterisk (*).

User Name First Name
 Last Name From Date of Request
 Role To Date of Request
 Organization DSS Universe
 Status

Search Results

User Name	First Name	Last Name	Role	Organization	Universe	Status
IMAPARTNER	IMA	PARTNER	Child LTS Waiver	Child LTS Waiver	National Code Set	Requested

Figure 48 Portal DSS Access Request Search Results Panel

3. Click the user whose profile you wish to view. The Request User Profile page for the user will be displayed.

Request User Profile

User Information

User Name First Name
 Last Name Role
 Organization DSS Universe
 Status

Please select one or more of the Universe Control Items below*

National Code Set

Figure 49 Request User Profile Page

This page allows Portal administrators users to view and manage Portal DSS access requests.

4. Click the Status drop-down menu to approve or deny the request.

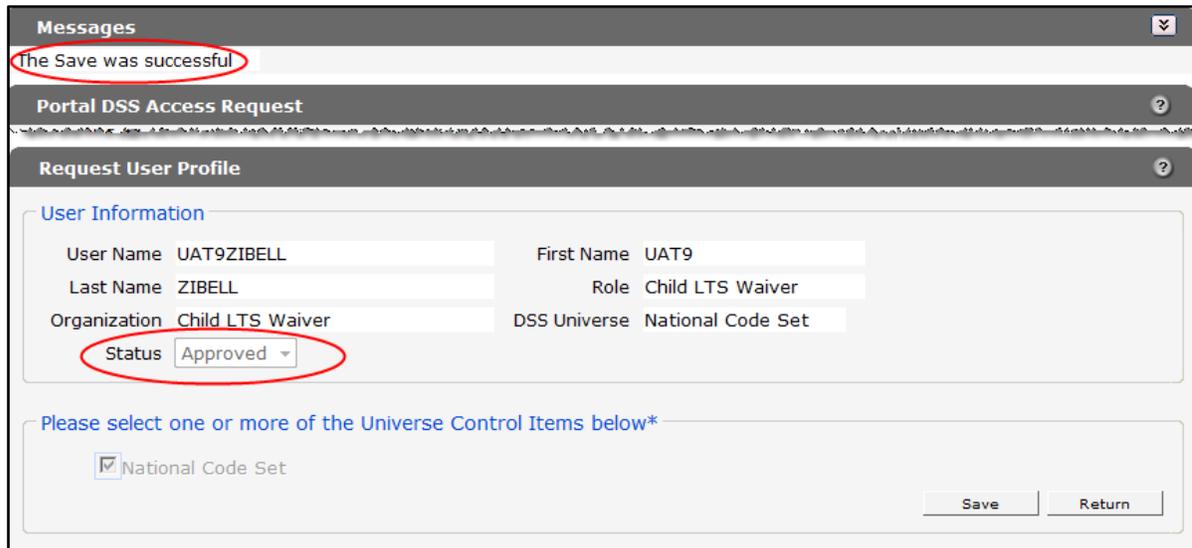
Status

Approved
Denied

Figure 50 Approve or Deny Request

5. Click **Save**.

The status field will show the selected status grayed out and a “Save was successful” message will be displayed at the top of the page.



The screenshot displays a web interface for a 'Request User Profile'. At the top, a 'Messages' section shows a notification: 'The Save was successful', which is circled in red. Below this is a 'Portal DSS Access Request' section. The main content area is titled 'Request User Profile' and contains a 'User Information' section. This section includes several fields: 'User Name' (UAT9ZIBELL), 'First Name' (UAT9), 'Last Name' (ZIBELL), 'Role' (Child LTS Waiver), 'Organization' (Child LTS Waiver), and 'DSS Universe' (National Code Set). The 'Status' field is a dropdown menu currently set to 'Approved', also circled in red. Below the user information, there is a section titled 'Please select one or more of the Universe Control Items below*' with a checkbox for 'National Code Set' which is checked. At the bottom right of the form, there are 'Save' and 'Return' buttons.

Figure 51 Request User Profile — Successful Save

A confirmation email will be sent to the user when the request is granted by DSS. Users will not have access to the Business Objects Web reporting tool until permission is granted by DSS.

The Return button will close the user profile page and return you to the search results page.

5 General Portal Information

5.1 Account Maintenance

1. From the main menu tabs displayed across the top of the page, click **Account**. The Account home page will be displayed.

wisconsin.gov home state agencies subject directory department of health services

ForwardHealth
Wisconsin serving you

interChange
Partner

Welcome wicuser » November 4, 2011 12:21 PM
[Logout](#)

[Home](#) | [Search](#) | [Partners](#) | [Enrollment](#) | [Max Fee Home](#) | **[Account](#)** | [Contact Information](#) | [Site Map](#)
[Certification](#) | [iC Functionality](#)

You are logged in as a WIC Worker

 [Account](#)

Account Home

From this page, authorized users can manage their user account(s) for the ForwardHealth Portal. Users setup, update, and maintain account login credentials, change/reset passwords, assign roles for authorized employees, and read and manage messages pertaining to their account. Click on the link from those provided below to select the action you wish to perform. Consult the Account User Guide for specific instructions on each task.

What would you like to do?

- [Maintenance](#)
- [Messages](#)
- [Change Password](#)

[About](#) | [Contact](#) | [Disclaimer](#) | [Privacy Notice](#)
Wisconsin Department of Health Services

Figure 52 Account Home Page

The Account home page contains links that allow you to update your login credentials, contact information and security questions, view and manage messages, and change your login password.

- To update your login credentials, contact information and security questions, click **Maintenance**. The Account Maintenance panel will be displayed.

Account Maintenance ?

Required fields are indicated with an asterisk (*).

User Profile

- Security Answers are case sensitive

User Name

Contact First Name*

Contact Last Name*

Telephone Number*

E-Mail*

Confirm E-Mail*

First Security Question*

First Answer

Second Security Question*

Second Answer

Third Security Question*

Third Answer

Fourth Security Question*

Fourth Answer

Figure 53 Account Maintenance Panel

- Change any information you wish to update, keeping in mind that all fields on this panel must be populated.
- Click **Submit**.

A confirmation message will be displayed at the top of the page. If there is a problem with the information entered, an error message will be displayed here.



Figure 54 Confirmation Message

5.2 Changing Passwords

Users can change their login password using either the Change Password button on the Account Maintenance panel or the link on the Account Home page.

1. Click Change Password. The Change Password page will be displayed.



Figure 55 Change Password Page

2. Enter your current password in the **Current Password** field.
3. Enter your new password in the New Password field according to the guidelines in [Section 2.1 ForwardHealth General Password Guidelines](#).
4. Enter your new password again in the Confirm New Password field.
5. Click **Submit**.

A confirmation message will be displayed at the top of the page. If there is a problem with the password entered, an error message will be displayed here.

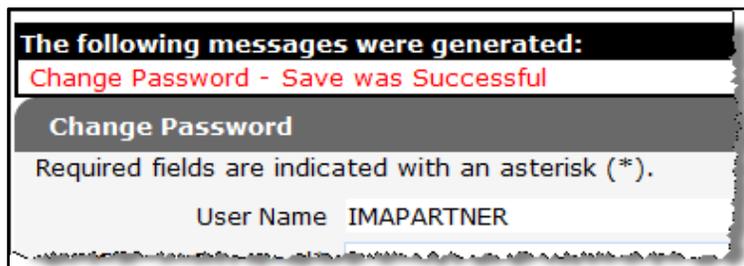


Figure 56 Confirmation Message

5.3 Resetting Passwords

If you forget your password or need to reset it for any reason, you can reset it yourself by using the Password Reset function on the ForwardHealth Portal.

1. Access the Portal at <https://www.forwardhealth.wi.gov/>. The Portal home page will be displayed.

2. Click **Login** on the right side of the page. The login box will be displayed.



ForwardHealth Portal Login:

Username

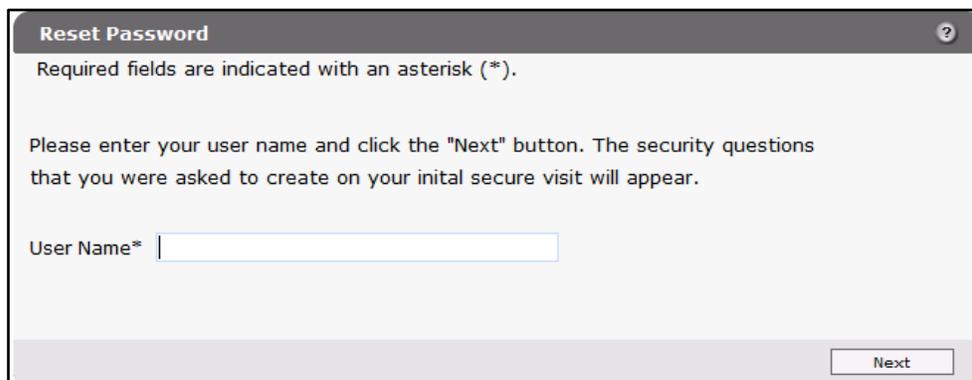
Password

Go!

- Logging in for the first time?
- **Forgot your password?** ←

Figure 57 Portal Login Box

3. Click **Forgot your password?** The Reset Password panel will be displayed.



Reset Password ?

Required fields are indicated with an asterisk (*).

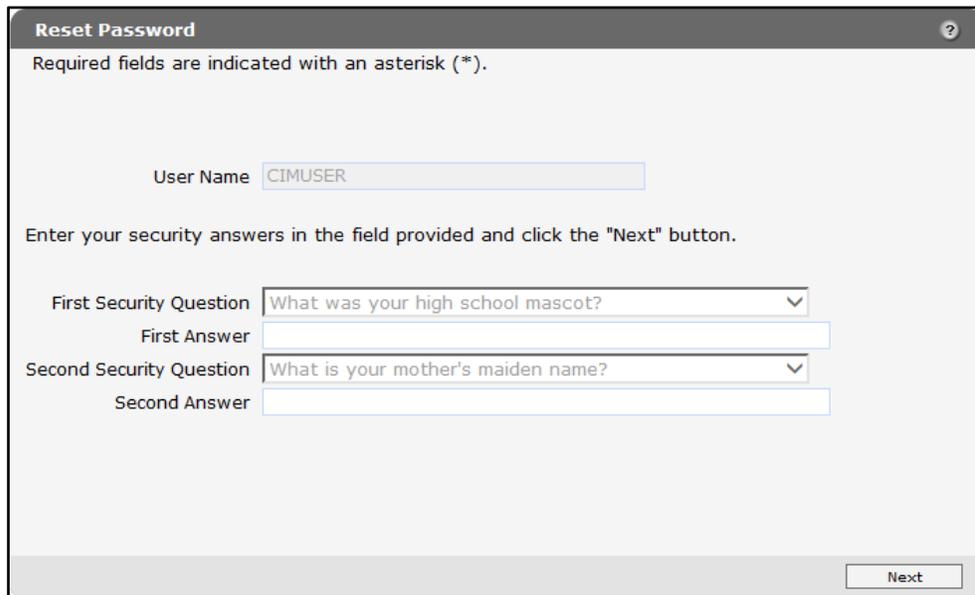
Please enter your user name and click the "Next" button. The security questions that you were asked to create on your initial secure visit will appear.

User Name*

Next

Figure 58 Reset Password Panel

4. Enter your User Name and click **Next**. The security question fields will be displayed.

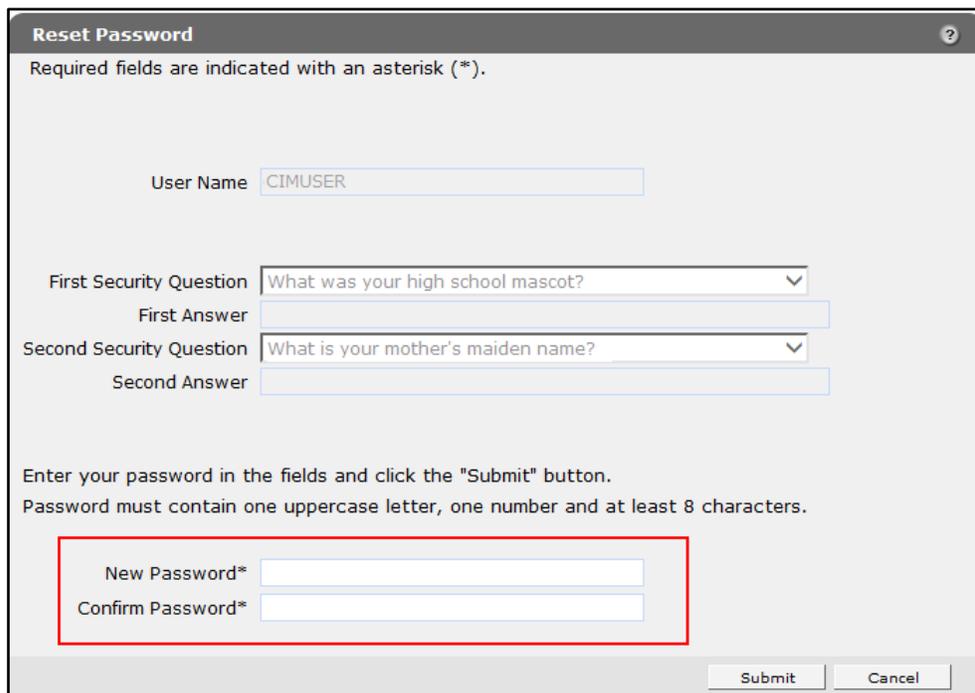


The screenshot shows a web form titled "Reset Password" with a help icon in the top right corner. Below the title, it states "Required fields are indicated with an asterisk (*)." The form contains the following fields:

- User Name: A text input field containing "CIMUSER".
- Instructions: "Enter your security answers in the field provided and click the 'Next' button."
- First Security Question: A dropdown menu with "What was your high school mascot?" selected.
- First Answer: A text input field.
- Second Security Question: A dropdown menu with "What is your mother's maiden name?" selected.
- Second Answer: A text input field.
- Next: A button at the bottom right.

Figure 59 Reset Password Panel with Security Question Fields

5. Answer both security questions and click **Next**. The New Password and Confirm Password fields will be displayed.



The screenshot shows the same "Reset Password" form as Figure 59, but with additional fields and instructions:

- User Name: A text input field containing "CIMUSER".
- First Security Question: A dropdown menu with "What was your high school mascot?" selected.
- First Answer: A text input field.
- Second Security Question: A dropdown menu with "What is your mother's maiden name?" selected.
- Second Answer: A text input field.
- Instructions: "Enter your password in the fields and click the 'Submit' button. Password must contain one uppercase letter, one number and at least 8 characters."
- New Password*: A text input field, highlighted with a red border.
- Confirm Password*: A text input field, highlighted with a red border.
- Submit: A button at the bottom right.
- Cancel: A button at the bottom right.

Figure 60 Reset Password Panel with New Password and Confirm Password Fields

6. Enter your new password according to the guidelines in [Section 2.1 ForwardHealth General Password Guidelines](#).

7. Click **Submit**.

- If the new password is accepted, a confirmation message will be displayed.
- If there is a problem, an error message will be displayed indicating the problem that needs to be corrected.

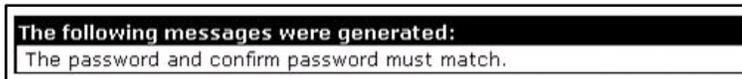


Figure 61 Password Reset Error

5.4 Logging On and Off the Portal

The quickest way to log in to the Portal is to click the **Login** link in the upper right corner of any screen, and enter your username and password. Once logged in, the link changes to *Logout*.

When you are finished with any session, always remember to click the **Logout** link.

5.5 Portal Navigation

When you log in to the secure Partner area of the Portal, the initial page displayed is the Partner page. It contains many of the navigation features available on most Portal pages and allows you to easily navigate the Partner area of the Portal.

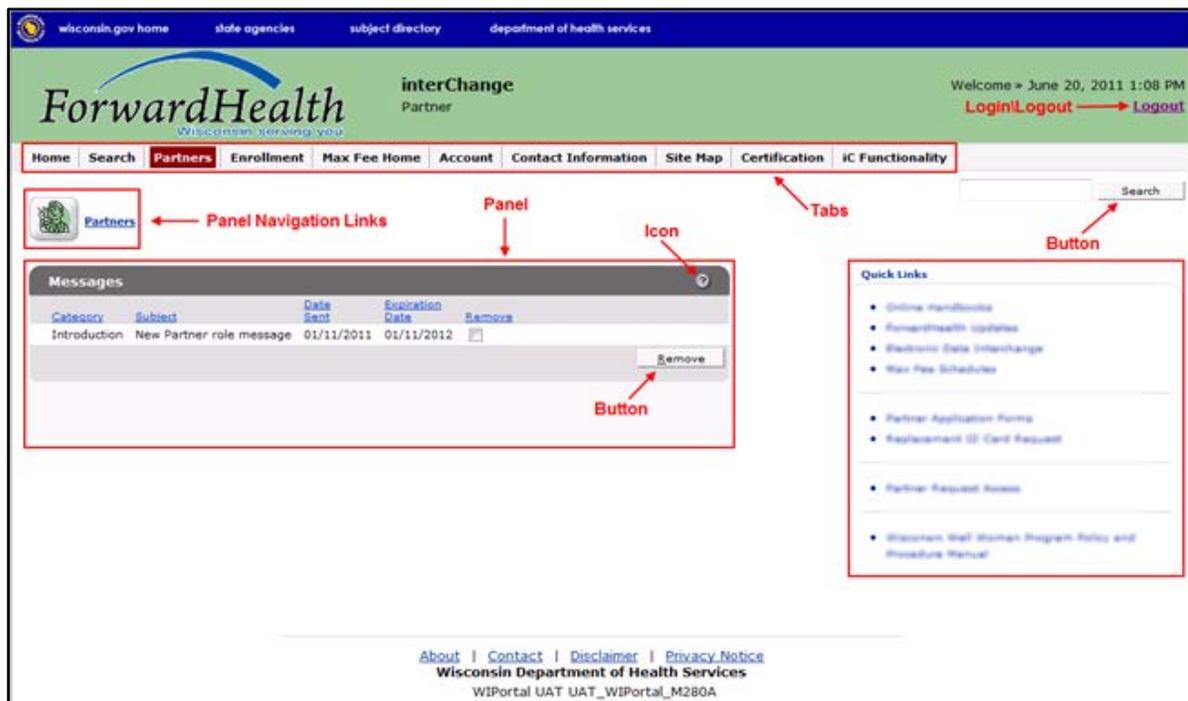


Figure 62 Portal Navigation

- **Tabs** — Clicking on a tab in the main menu will take you to that section of the Partner area of the Portal.

- *Login/Logout* — a link that toggles between displaying the username/password text boxes (*Login*) or logging out of the system (*Logout*).
- *Other features:*
 - Links at the bottom of the page provide access to contacts and other general information (About, Contact, Disclaimer, Privacy Notice).
 - Links at the top of the page provide access to other state of Wisconsin sites (*wisconsin.gov* home, state agencies, subject directory, and Department of Health Services).

5.5.1 Buttons

Below is a list of common buttons and the operations and functions they support:

Button	Result
Clear	Clears all the information entered into the fields on a panel.
Close	Closes a window, such as a popup window.
Save	Saves a modification made to a panel or a new record (for authorized users who can make updates).
Remove	Deletes an onscreen message.
Search	Initiates a search query.

5.5.2 Error Messages

Error messages commonly appear when information is incorrectly entered, or is not entered in a required field. These error messages are displayed beneath the navigation links at the top of a panel, and may also appear next to a field that contains an error. Messages also display a warning when the user navigates away from a page.

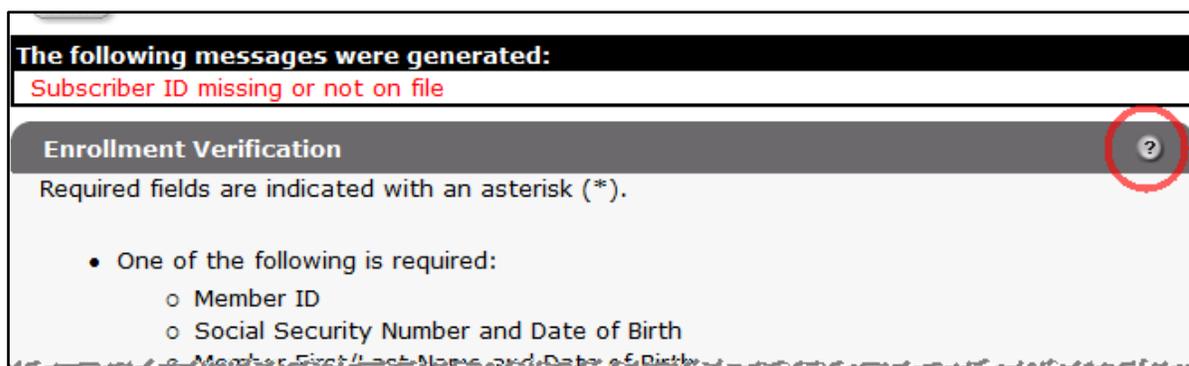


Figure 63 Sample Error Message

If the meaning of an error message is unclear, you can access further information about the message by clicking the question mark icon located on the gray bar at the far right side of each screen.

5.6 Online Help

5.6.1 Panel Help

Panel help is accessed by clicking the question mark icon on the gray bar located at the far right side of the panel.

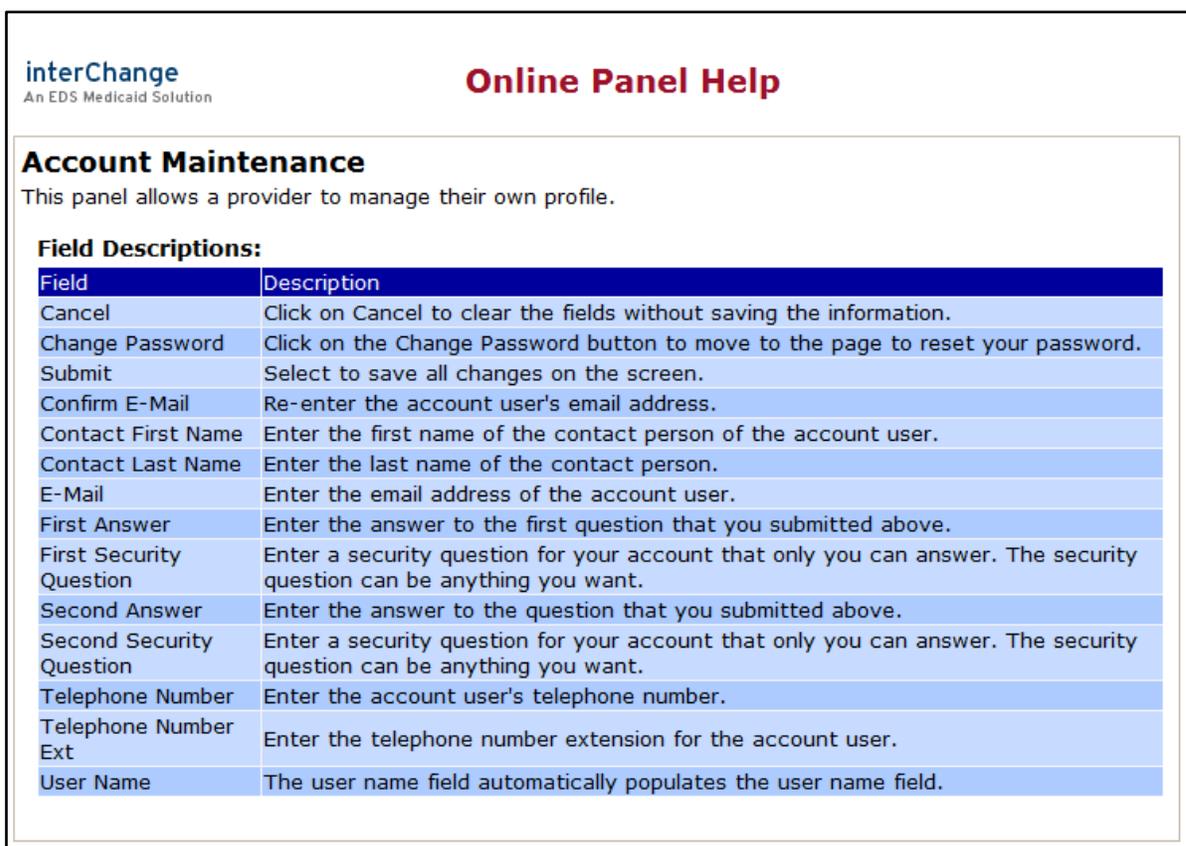
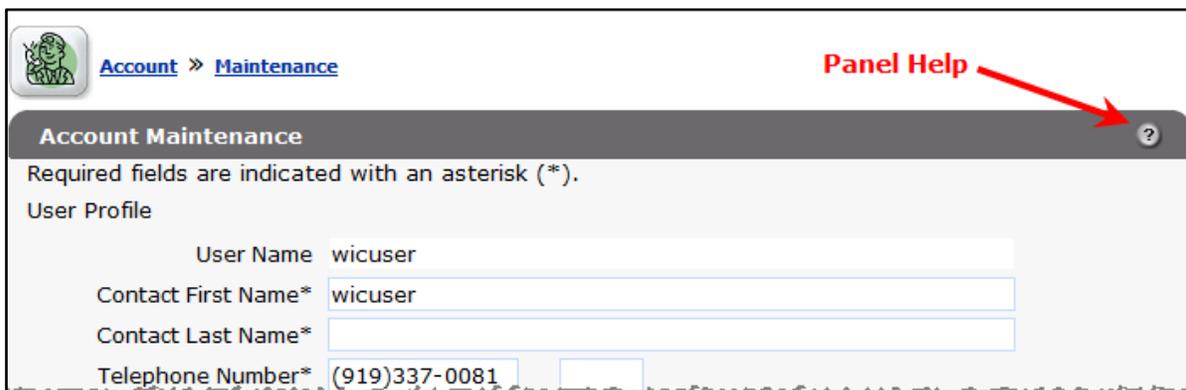


Figure 64 Panel Help Feature — Question Mark Function

The Online Panel Help page identifies the name of each field and buttons used on the panel along with descriptions and error messages. These descriptions (listed alphabetically) are the same messages the user sees when accessing the field help.

5.6.2 Field Help

To access help on an individual field:

1. Hover the cursor over the name of a field and a question mark will appear.

The screenshot shows the 'Account Maintenance' form. The 'User Profile' section includes fields for User Name, Contact First Name, Contact Last Name, Telephone Number, E-Mail, and Confirm E-Mail. Below these are four security questions, each with a dropdown menu and an answer field. A red box highlights the 'First Security Question' dropdown, which is currently set to 'What was your high school mascot?'. A tooltip with a question mark icon and the text 'Help for First Security Question' is displayed over the dropdown. The tooltip content is shown in Figure 66.

Figure 65 Field Help

2. When the question mark appears, click on the field and a description of the field will be displayed.

First Security Question
Select a security question for your account that only you can answer.

Figure 66 Field Help Panel

5.7 Downloading Documents from the Portal

If errors occur when downloading documents, try the following:

- Make certain to allow pop-ups on the Portal. In Internet Explorer:
 - Go to Tools>Pop-up Blocker>Pop-up Blocker Settings.
 - Add *www.forwardhealth.wi.gov/* to the *Address of website to allow*.
- Add the Portal website to your list of Trusted Sites. For Internet Explorer:

- Go to Internet Options.
- Click the Security tab.
- Select Trusted sites.
- Click Sites.
- Add *www.forwardhealth.wi.gov/* to the list.
- Set the **Trusted Sites security level** to the **Medium-low** default setting. For Internet Explorer:
 - Go to Internet Options>Security.
 - Click Trusted sites.
 - Click Default level.
 - Set the Security level slider to Medium-low.

6 Contact Information

The following table contains contact information for ForwardHealth.

Agency Assignments Eligibility

PO Box 7636
Madison WI 53713
608-224-6521
FAX: 608-221-8815

Eligibility Supervisor	608-224-6002
Nursing Home Authorization	608-224-6536
SLMB/QMB/Buy-In	608-224-6516
TPL Mini Call Center	608-243-0676

6.1 Other Contacts

Resources	
Resource	Contact Information
<p>Member Services</p> <p>Correspondents assist members, or persons calling on behalf of members, with questions about the following:</p> <ul style="list-style-type: none"> • Member enrollment. • General program information. • Finding certified providers. • Resolving member concerns. • SeniorCare. 	<p>800-362-3002</p> <p>Available Monday through Friday, 7:00 a.m.–6:00 p.m. (Central Time, with the exception of state-observed holidays).</p>

Resources	
Resource	Contact Information
<p>ForwardHealth Provider Services Call Center</p> <p>Correspondents assist providers with questions about the following programs:</p> <ul style="list-style-type: none"> • ADAP. • BadgerCare Plus. • Medicaid. • SeniorCare. • WWWMA. • WCDP. • WWWP. • Wisconsin Medicaid and BadgerCare Plus managed care programs. 	<p>800-947-9627</p> <p>Available Monday through Friday, 7:00 a.m.–6:00 p.m. (Central Time, with the exception of state-observed holidays).</p>
<p>ForwardHealth Portal Helpdesk</p> <p>Correspondents assist providers and trading partners with questions about the following:</p> <ul style="list-style-type: none"> • Portal functions and capabilities. • Portal accounts. • Portal registrations. • Portal passwords. • Submissions through the Portal. 	<p>866-908-1363</p> <p>Available Monday through Friday, 8:30 a.m.–4:30 p.m. (Central Time, with the exception of state-observed holidays).</p>
<p>Managed Care Ombudsman Program</p> <p>Ombudsmen assist managed care enrollees with questions about the following:</p> <ul style="list-style-type: none"> • Enrollment. • Enrollee rights and responsibilities. • General managed care information. 	<p>800-760-0001</p> <p>Available Monday through Friday, 7:00 a.m.–6:00 p.m. (Central Time, with the exception of state-observed holidays).</p>
<p>WiCall Automated Voice Response (AVR) System</p> <p>WiCall is an AVR system that allows providers with touch-tone telephones direct access to enrollment information.</p>	<p>800-947-3544</p> <p>Press “1” to begin.</p> <p>Available 24 hours a day, seven days a week.</p>
<p>Electronic Data Interchange (EDI) Helpdesk</p> <p>For providers, trading partners, billing services, and clearinghouses with technical questions about the following:</p> <ul style="list-style-type: none"> • Electronic transactions. • Companion documents. • Provider Electronic Solutions (PES). 	<p>866-416-4979</p> <p>Monday through Friday, 8:30 a.m.-4:30 p.m. (Central Time, with the exception of state-observed holidays).</p>

Resources	
Resource	Contact Information
ForwardHealth Websites ForwardHealth Portal — Providers, Trading Partners, Partners, HMOs — https://www.forwardhealth.wi.gov/WIPortal/ . Members — http://dhs.wisconsin.gov/forwardhealth/ . Webcasts — http://media1.wi.gov/dhfs/catalog/ .	

7 Managed Care Special Condition Codes

Special Condition	Description	Aged Threshold	Aged Threshold Period
L01	Grandfathered (Non-MA)	0	
L02	Grandfathered (MA)	0	
L03	Non-Nursing Home Level of Care (Non-MA)	0	
L04	Non-Nursing Home Level of Care (MA)	0	
L05	Nursing Home Level of Care (Non-MA)	0	
L06	Nursing Home Level of Care (MA)	0	
SNF	CCE/CLA/ECO - Skilled Nursing Facility	0	
ICF	CCE/CLA/ECO - Intermediate Care Facility	0	
ISN	CCE/CLA/ECO - Intensive Skilled Nursing	0	
SN1	CHP - Skilled Nursing Facility	0	
IC1	CHP - Intermediate Care Facility	0	
IS1	CHP - Intensive Skilled Nursing	0	
E71	SSI Opt Out	0	
E72	SSI Waiver Program Opt Out	0	
E73	Commercial Insurance	0	
E74	Native American	0	
E75	Migrant Worker	0	
E76	Commercial HMO	6	Months
E77	Federally Qualified Health Center (FQHC)	12	Months
E78	Nurse Midwife/Practitioner	9	Months
E79	Mixed Family Medicaid/SSI Household	12	Months
E80	Distance	12	Months
E01	Voluntary Disenrollment	12	Months
E81	Short Term Mental Health	3	Months
E82	Continuity of Care up to Six Month Exemption for Special Treatment	3	Months
E83	Low Birth Weight	12	Months
E02	Long Term Complex Care	12	Months
E84	Birth to Three	6	Months
E85	Third Trimester Pregnancy	6	Months
E86	Mental Retardation Diagnosis	0	
E87	Ninth Month Pregnancy	3	Months

Special Condition	Description	Aged Threshold	Aged Threshold Period
E88	Transplants	0	
E03	Just Cause	0	
E89	HIV Positive/AIDS	0	
E91	High Risk Pregnancy	9	Months
E92	Mental Health	12	Months
E93	Methadone Treatment	12	Months
E96	HIPP Determination Occurring	0	
E97	HIPP Employer Insurance Confirmed	0	
E99	Disaster Evacuee	0	

8 Common Buy-In Premium Transaction Codes

Common Buy-In Premium TXN (Transaction) Codes	
51	Deletion Action to delete a beneficiary because the beneficiary is no longer a member of the States coverage group.
61	Accretion Action [system generated].
63	Accretion Action for subsequent State analysis [manually generated].
75	Simultaneous accretion/deletion action (closed period).

Common Buy-In Bill TXN Codes	
1161	This code informs the State that an accretion submitted by the State has been added to the TPM [third party master]. [The accretion record was system generated.]
1163	This code informs the State that an accretion submitted by the State has been added to the TPM [third party master]. [The accretion record was manually generated.]
1180	This code informs the State which has a 1634 Agreement (auto-accrete State) that CMS has established a buy-in record for an SSI recipient.
15	This code informs the State that the individual was deleted from the State's account because SSAs records indicate that the individual currently does not meet all the requirements for Medicare (such as age, citizenship, or residency).
16	This code informs the State that according to SSA/CMS records the beneficiary is deceased. CMS has deleted the beneficiary from the account.
1751	This code informs the State that the beneficiary was deleted from the State's account based on a deletion record submitted by the State. The code 1751 is limited to the current month or the following month.
1753	This code informs the State that the beneficiary was deleted from the State's account based on a death deletion record submitted by the State.
41	Informs the State that the individual is on the State's rolls as an ongoing item. The State is responsible for paying the individual's Medicare premium and has deletion responsibility if the beneficiary is no longer eligible for Buy-in.
4375	This code informs the State that a simultaneous accretion/deletion (closed period) has been added to the TPM. The closed period may be the result of a single State input record or may be the result of one or more adjustments to a State input record.