

# User Guide

## ForwardHealth Provider Portal Account

July 15, 2024



WISCONSIN DEPARTMENT  
*of* HEALTH SERVICES

# Table of Contents

1 Introduction.....	1
2 Request Portal Access .....	2
3 Set Up an Account.....	9
3.1 Account Types .....	9
3.2 Logging in for First Time.....	10
3.3 Reset Password .....	17
3.4 Unlocking An Account .....	30
4 Maintenance .....	41
4.1 Change Account Information .....	41
5 Change Password .....	48
6 Clerk Maintenance .....	50
6.1 Add a Clerk .....	51
6.2 Search for a Clerk .....	53
6.3 Add a Role to a Clerk .....	55
6.4 Remove a Role From a Clerk.....	57
6.5 Assign a Clerk Administrator .....	59
6.6 Reset a Clerk’s Password .....	60
6.7 Delete a Clerk Account .....	61
6.8 Clerk Account Log in for First Time.....	61
7 Administrator Backup Information.....	72
8 Clerk Last Logon .....	73
8.1 Search and Remove a Clerk Account.....	73
9 Add Organization.....	75
10 Switch Organization.....	78
10.1 Search and Switch to Organization.....	78

10.2 Set As Default Login Organization .....	81
11 Messages.....	83
12 Message Center.....	86
12.1 Send a New Message.....	87
12.2 Read a Message.....	89
12.2.1 Respond to an Open Message.....	90
12.3 Search for a Message .....	91
12.4 Notification Preferences and Validation Code .....	92
13 Trading Files .....	94
13.1 Avoiding Download Errors.....	95
14 Access interChange Functionality.....	96
15 Member.....	97
15.1 Member Search .....	97
15.1.1 Member Information Panel.....	99
15.1.2 Open Tab Menu.....	102
Member Menu .....	102
Base Information Panel .....	102
Member Review Panel .....	103
16 Appendix: Portal Help Desk Support .....	105

# 1 Introduction

The ForwardHealth Portal allows providers to conduct business through a secure entry point 24 hours a day, seven days a week. After creating a secure Provider Portal account, providers can perform various functions including verifying member enrollment; submitting electronic claims, adjustments, and prior authorization requests; and viewing other reports and data. To avoid a delay in service, providers must provide contacts and communicate in a timely manner.

# 2 Request Portal Access

To establish a Provider Portal account, providers will need a PIN. Providers can establish as many provider Portal accounts as needed for their business. Helpdesk support information is available in the [Appendix: Portal Helpdesk Support](#) of this guide.

1. To request a PIN, access the Portal at <https://www.forwardhealth.wi.gov/>.

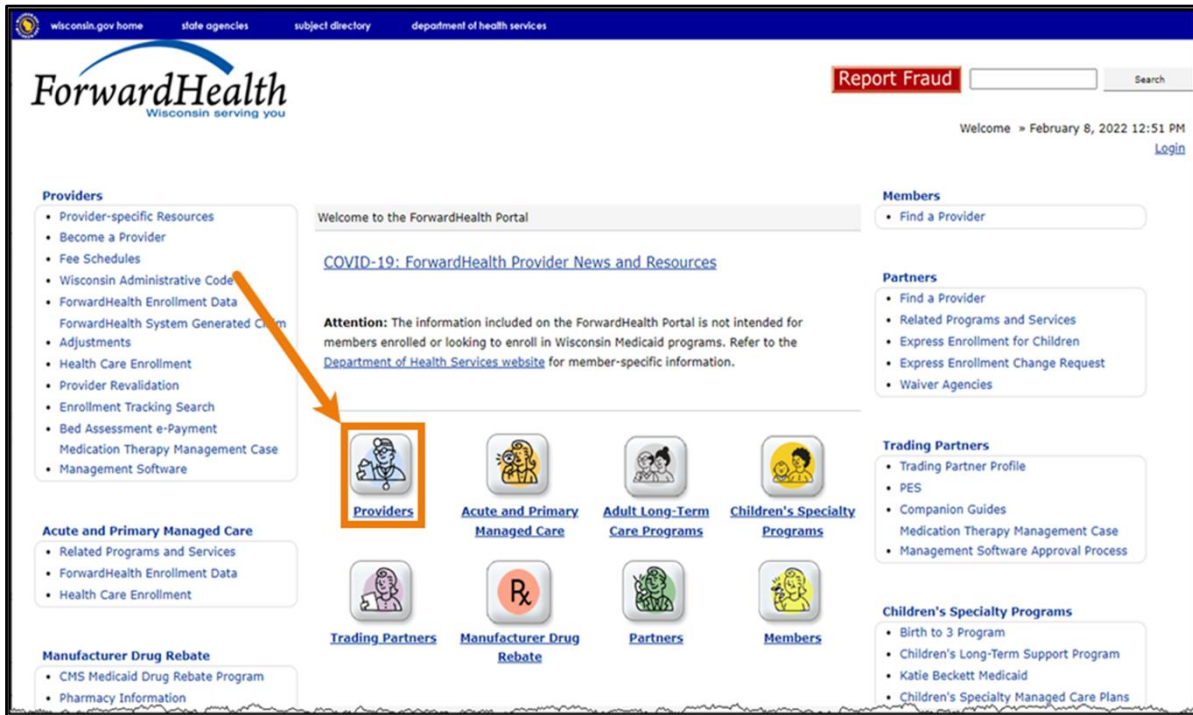


Figure 1 ForwardHealth Portal Homepage

2. Click **Providers**. The public page for the Provider area of the Portal will be displayed.



wisconsin.gov home state agencies department of health services

**ForwardHealth**  
Wisconsin serving you

interChange  
Provider

Welcome » September 8, 2023 10:34 AM  
[Login](#)

Search

Providers can use this page to access up-to-date information about programs covered under ForwardHealth. The links below and to the right offer easy access to key information and tools used most often. Providers should log in to the secure Provider Portal to submit or retrieve information about their account or member data which may be sensitive and/or fall under the requirements of the Health Insurance Portability and Accountability Act (HIPAA).

**Provider Links**

- [COVID-19 Unwinding Resources](#)
- [Explanation of Benefits](#)
- [Federal Poverty Limits for Presumptive Eligibility \(PE\) Determinations](#)
- [ForwardHealth System Generated Claim Adjustments](#)
- [DIG Post-Payment Review](#)
- [Oploid Treatment Program Certification](#)
- [Other Insurance - Carrier Number](#)
- [Medicaid Recovery Audit Contractor \(RAC\) Information](#)
- [PERM Resources](#)
- [Provider-specific Resources](#)
- [Related Programs and Services](#)
- [State of Wisconsin Value Added Networks](#)
- [Telehealth Expansion and Related Resources](#)
- [Tobacco Cessation Benefit](#)

**Quick Links**

- **Request Portal Access**
- [Find/Contact your Professional Field Representative](#)
- [Physician Administered Drug Resources](#)
- [Provider Resources Reference Guide](#)
- [Provider-specific Resources](#)
- [Fee Schedules](#)
- [Become a Provider](#)
- [Enrollment Tracking Search](#)
- [Request for Medicaid Coverage](#)
- [Consideration for Procedures and Devices](#)

• [Provider Revalidation](#)

• [Medication Therapy Management Case Management Software Approval Process](#)

Wisconsin Well Woman Program Policy and

- [Procedure Manual](#)
- [Express Enrollment Change Request](#)

What's New? Policy and Communication

**Figure 2** Public Provider Page

- In the Quick Links box on the right of the page, click **Request Portal Access**. The Request Portal Access page will be displayed.

**Request Portal Access**

Required fields are indicated with an asterisk(\*).

- Please complete the fields below to request your secure provider portal web access.
- You must complete either the NPI Information or Provider Number Information section.
- For the NPI Information section:
  - Enter your NPI and press the search button.
  - Select the appropriate ForwardHealth certification.
  - Enter your SSN/TIN.

**NPI Information**

NPI Number

**ForwardHealth Certifications for Requested NPI**  
Enter your NPI and press search.

**Selected NPI \***

NPI Number   
 Name   
 Address Line 1   
 City   
 ZIP  -   
 Taxonomy   
 Financial Payer   
 SSN or TIN

OR

**Provider Number Information \***

Provider ID   
 Financial Payer   
 SSN or TIN

**Figure 3** Request Portal Access Page

- In the “NPI Information” section, enter the provider’s National Provider Identifier (NPI) in the NPI Number field if the user is a health care provider.

If the user is not a health care provider (for example, a personal care only provider, a specialized medical vehicle provider, or a blood bank), they can proceed to [Step 9](#) of this guide.

5. Click **Search**.

The “ForwardHealth Certifications for Requested NPI” section will auto-populate with the provider’s information that ForwardHealth has on file.

If the NPI is not found, the page will refresh; however, the “ForwardHealth Certification for Requested NPI” section will not be populated with the provider’s information.

**Request Portal Access** ?

Required fields are indicated with an asterisk(\*).

- Please complete the fields below to request your secure provider portal web access.
- You must complete either the NPI Information or Provider Number Information section.
- For the NPI Information section:
  - Enter your NPI and press the search button.
  - Select the appropriate ForwardHealth certification.
  - Enter your SSN/TIN.

**NPI Information**

NPI Number

ForwardHealth Certifications for Requested NPI						
Name	Street	City	ZIP Code	Financial Payer	Taxonomy	Description
GENERAL CLINIC	92 E 88TH ST STE 300	MADISON	53703	Medicaid	100RC0000X	Internal Medicine - Cardiovascular Disease

**Selected NPI \***

NPI Number

Name

Address Line 1

City

ZIP  -

Taxonomy

Financial Payer

SSN or TIN

OR

**Provider Number Information \***

Provider ID

Financial Payer

SSN or TIN

**Figure 4** Request Portal Access Page



- Click the appropriate row from the “ForwardHealth Certifications for Requested NPI” section. The “Selected NPI” section will auto-populate with the selected information.

**NPI Information**

NPI Number

ForwardHealth Certifications for Requested NPI						
Name	Street	City	ZIP Code	Financial Payer	Taxonomy	Description
GENERAL CLINIC	92 E 88TH ST STE 300	MADISON	53703	Medicaid	100RC0000X	Internal Medicine - Cardiovascular Disease

**Selected NPI \***

NPI Number

Name

Address Line 1

City

ZIP  -

Taxonomy

Financial Payer

SSN or TIN

**Figure 5** Selected NPI Section With Auto-Populated Information

- Enter the provider’s Social Security number (SSN) or Tax ID Number (TIN) in the SSN or TIN field in the “Selected NPI” section.
- Skip to [Step 12](#) of this guide.
- If the provider is not a health care provider and therefore does not have an NPI, enter the provider’s Medicaid Provider ID in the “Provider Number Information” section.
- From the Financial Payer drop-down menu, select the financial payer certification for which the provider is requesting a Provider Portal account.
- Enter the provider’s SSN or TIN in the SSN or TIN field.

**Provider Number Information \***

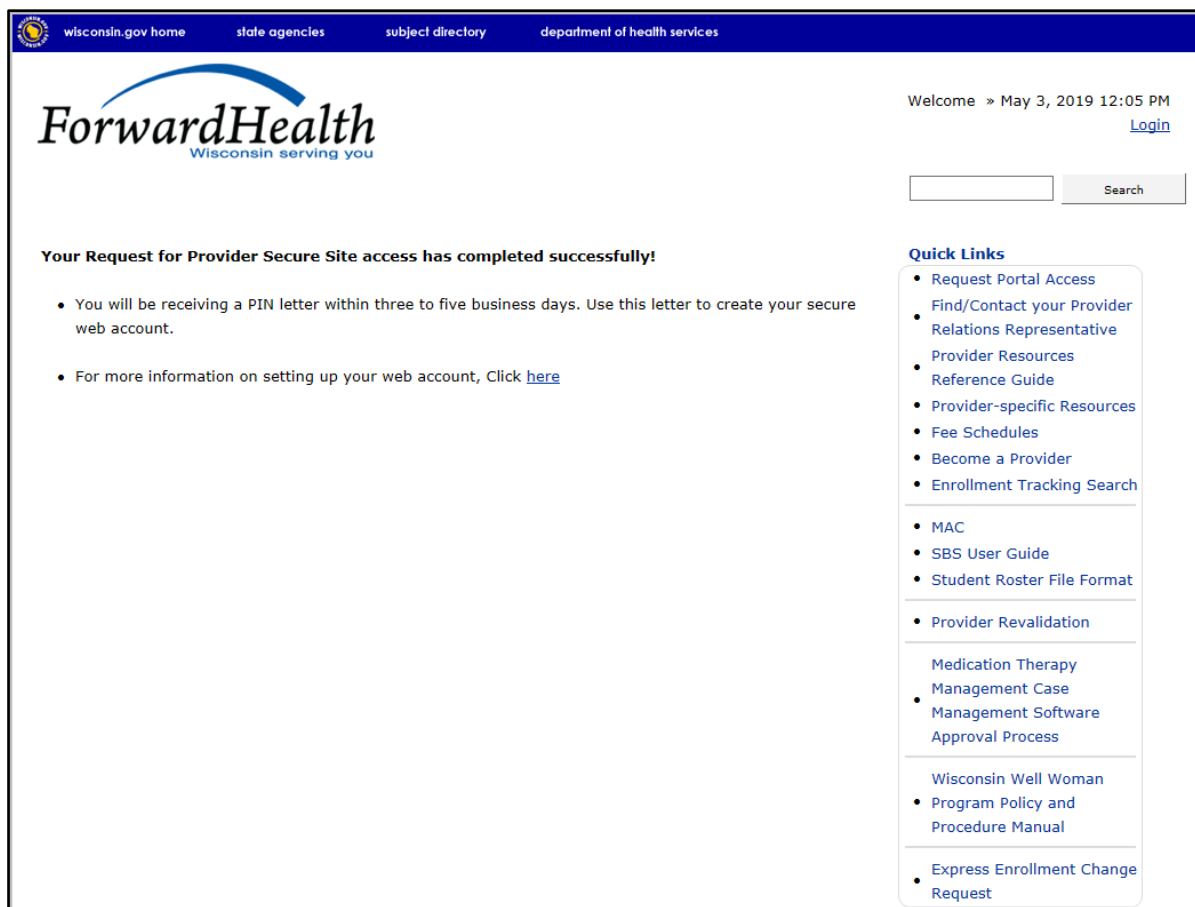
Provider ID

Financial Payer

SSN or TIN

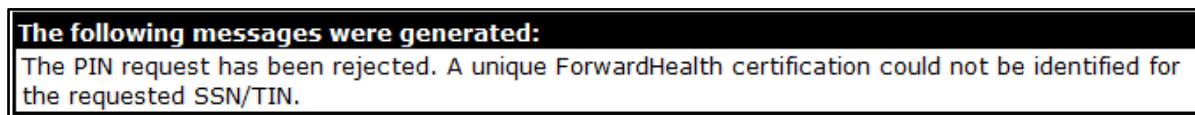
**Figure 6** Provider Number Information Section

12. Click **Submit**. If the request is successful, a confirmation page will be displayed.



**Figure 7** Confirmation Page

If the request is not successful, an error message indicating why the information could not be submitted will be displayed at the top of the page.




**Figure 8** Example Error Message

A request could be denied for some of the following reasons:

- No provider agreement on file. Call Provider Services at 800-947-9627 for the agreement.
- The SSN or TIN number is incorrect. Verify the number and enter the correct number.
- A PIN was already requested. Check within the organization to find out if someone has already received the PIN and set up an account(s).

If the user has questions, they may call the Portal Help Desk (toll free) at 866-908-1363 Monday through Friday between 8:30 a.m. and 4:30 p.m.

After a provider has successfully requested Portal access, a letter containing a PIN will be mailed to the provider. Access to the Portal is **not** possible without a PIN. The letter also includes a Login ID, which is a health care provider's NPI or a non-health care provider's Medicaid Provider ID. For security purposes, the Login ID contains only the third through sixth digits of the NPI or Provider ID.

Tony Evers Governor		<b>FORWARDHEALTH</b> ELECTRONIC DATA INTERCHANGE UNIT 313 BLETTNER BLVD MADISON WI 53784 Telephone: 866-416-4979 Fax: 608-221-0885 TTY: 711 <a href="http://www.dhs.wisconsin.gov/forwardhealth">www.dhs.wisconsin.gov/forwardhealth</a>
Karen E. Timberlake Secretary	<b>State of Wisconsin</b> Department of Health Services	

Month X, 20XX

**Im A. Provider**  
XYZ Clinic  
123 Main St  
Anytown WI 55555-1111

Dear Provider:

ForwardHealth has received your request to establish a secure Portal account. A summary of the information you provided is included below, along with a Login ID and Personal Identification Number (PIN) you will need in order to set up your secure provider account on the ForwardHealth Portal.

NPI or Provider ID:	xx3456xxxx
Provider Type/Specialty:	Physician/Internal Medicine
Taxonomy:	XXXXXXXXXXXX
Zip Code:	55555-1111
Financial Payer:	Medicaid

Please note that for security purposes, only digits 3, 4, 5, and 6 of your NPI or Provider ID are shown.

To create your secure Provider account:

- Go to the ForwardHealth Portal at [www.forwardhealth.wi.gov/](http://www.forwardhealth.wi.gov/).
- Select the "Providers" button.
- Select the Logging in for the first time? link under "Login to Secure Site".
- Enter your Login ID and PIN:  
Login ID: XXXXXXXXXXXX  
PIN: XXXXXXXXXXXX

Detailed instructions and helpful hints on setting up your secure provider account can be found at [www.forwardhealth.wi.gov/](http://www.forwardhealth.wi.gov/).

Sincerely,

<Department Name>

F-13512 (10/08)

[www.dhs.wisconsin.gov](http://www.dhs.wisconsin.gov)

**Figure 9** PIN Letter

# 3 Set Up an Account

After receiving a PIN letter, administrative account users may set up an account on the Portal. Users will use the Login ID and PIN from the PIN letter to create a user name and password as well as to enter contact and security information.

For information about adding a new organization to a current account, refer to [Chapter 9 Add Organization](#) of this guide.

## 3.1 Account Types

Three different account types are available through the Portal. Access to certain features or functions on the Portal is determined by the account type assigned to the user. Through these different account types, a high level of security and accountability is maintained:

- *Administrative accounts*—The user who establishes the Portal account with the Login ID and PIN (from the PIN letter) is considered the account administrator and is responsible for managing the Portal account. Administrative accounts are granted complete access to all functions and applications within the Provider area of the Portal and have the ability to add, remove, and manage other account types and their access. The account administrator is responsible for performing regular reviews of clerk accounts to ensure they are up to date.

Each service location (certification/provider file) can only have one user designated as an account administrator; however, multiple service locations can be attached to the same account administrator.

- *Clerk accounts*—Administrative accounts can set up clerk accounts with access to any or all of the roles available to the administrative account. If a new role becomes available, that role may be assigned to a clerk account. A clerk account can be added to multiple organizations to allow one clerk access to multiple organizations.
- *Clerk administrative accounts*—Clerk accounts may be granted clerk administrative rights. A clerk administrative account can create new clerk accounts with access to any or all of the roles to which the clerk administrative account has access and can delete and manage clerk accounts under their purview.

### 3.2 Logging in for First Time

After the administrative account user receives the PIN letter, they can access the Portal at <https://www.forwardhealth.wi.gov/>.

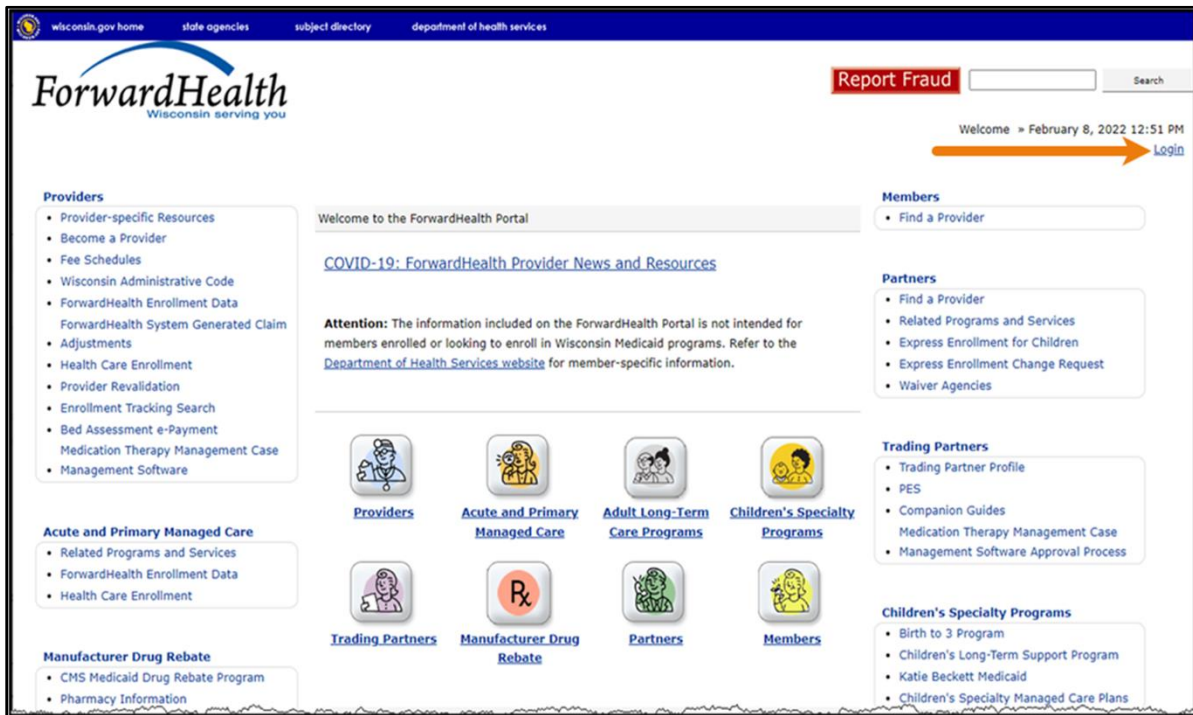
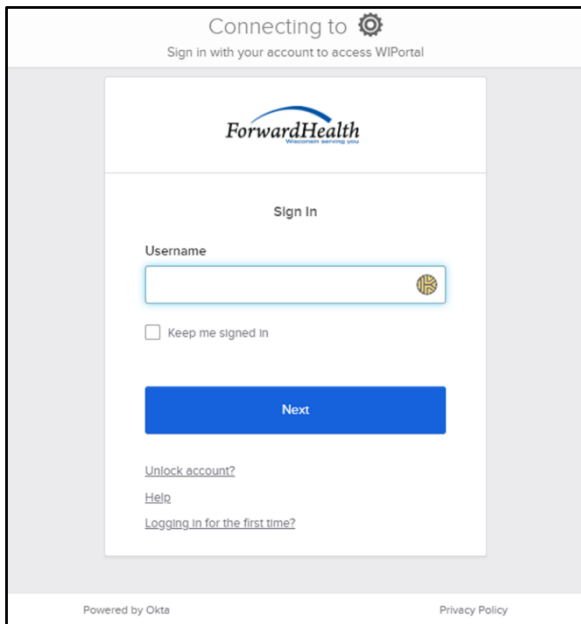


Figure 10 ForwardHealth Portal Homepage

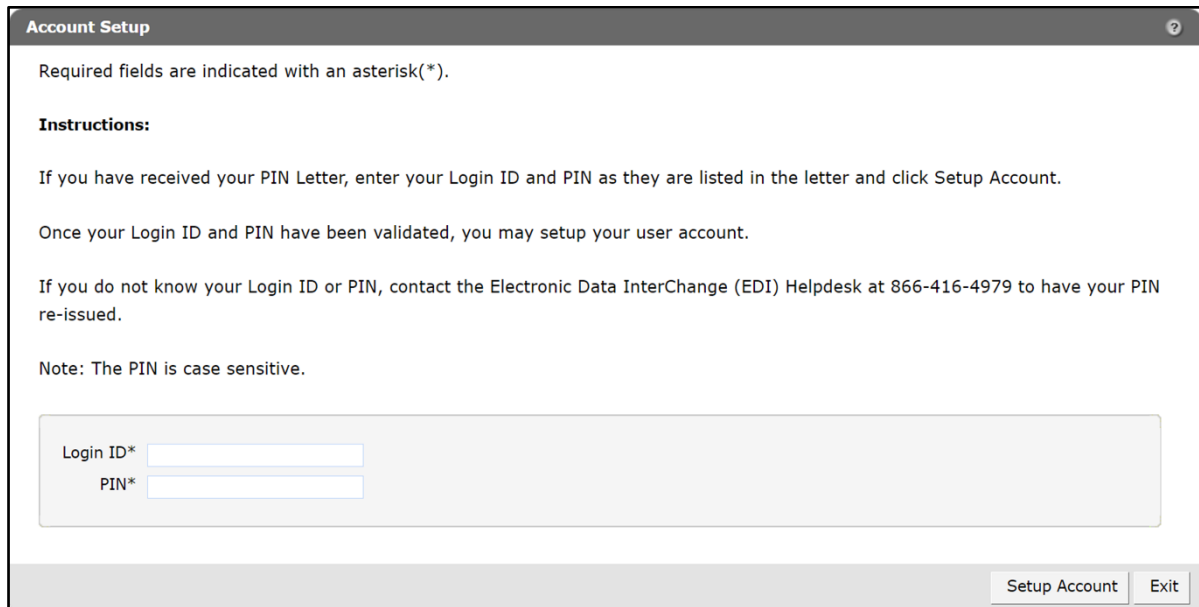
1. Click **Login**. A Sign In box will be displayed.



**Figure 11** Sign-In Box

2. Click **Logging in for the first time?**

The Account Setup page will be displayed.



**Account Setup**

Required fields are indicated with an asterisk(\*).

**Instructions:**

If you have received your PIN Letter, enter your Login ID and PIN as they are listed in the letter and click Setup Account.

Once your Login ID and PIN have been validated, you may setup your user account.

If you do not know your Login ID or PIN, contact the Electronic Data InterChange (EDI) Helpdesk at 866-416-4979 to have your PIN re-issued.

Note: The PIN is case sensitive.

Login ID\*

PIN\*

Setup Account Exit

**Figure 12** Account Setup Page

3. Enter the Login ID and PIN listed in the user's PIN letter.

For security purposes, the PIN letter will contain only four digits of the NPI or Medicaid Provider ID reported; however, users should **enter the entire** NPI or Medicaid Provider ID in the Login ID field.

The PIN from the PIN letter can only be used once. After the account has been established, the PIN cannot be used again.

4. Click **Setup Account**. The Administrator setup page will be displayed. Note: When new provider administrators create a Portal account, they are required to provide backup contact information during account setup. Provider administrators will not be able to use the same contact information for both the administrator account and the backup contact. Refer to [Chapter 7 Administrator Backup Information](#) of this guide.

**Administrator**

Required fields are indicated with an asterisk (\*):

- Password must contain one uppercase letter, one number, and at least eight characters.
- Security answers are case sensitive

**Administrator Information**

User Name\*  
Password\*  
Confirm Password\*  
Contact First Name\*  
Contact Last Name\*  
Telephone Number\*  
Email\*  
Confirm Email\*

**Security and Confidentiality**

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 (hereinafter the "System");

WHEREAS, while performing its services User may be given access to, or may be exposed to, certain confidential or Protected Health Information ("PHI") as defined under the Health Insurance Portability and Accountability Act of 1996 ("HIPAA"), 45 C.F.R. pts. 160-164, and applicable regulations that implement Title V of the Gramm-Leach-Bliley Act, 15 U.S.C. § 6801, et seq. (the "GLB Regulations");

WHEREAS, User desires to utilize the System provided by DHS, and DHS desires to provide the System and related services and support to User, as defined and according to the terms contained hereinafter.

WHEREAS, as a condition of User's engagement by DHS, User agrees to take certain precautions, comply with certain practices, and implement certain procedures required by applicable law for the purposes of safe guarding data integrity and safeguarding the confidentiality of PHI, all as more specifically set forth in this Agreement.

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

Submit Exit

**Figure 13** Administrator User Profile Page



5. Enter information in the fields. It is necessary to **complete all the fields** on this page.
  - The user name must be between six–20 characters and can only contain letters and numbers. The user name is not case-sensitive.  
  
Note: The user name cannot be changed without deactivating the account.
  - The password must be between nine–15 characters and must contain three different types of characters such as uppercase letters, lowercase letters, special characters, or numbers. The password must be unique and cannot contain information from the user name, contact first name, or contact last name.
  - The phone number must include the area code. The number will be auto-formatted.
6. Read the Security and Confidentiality agreement.
7. Check the agreement checkbox.
8. Click **Submit**. If the user receives an error message, correct the error(s) and click **Submit** again.

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 page will be displayed.

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

**ForwardHealth**  
Wisconsin serving you

Welcome » September 28, 2016 12:09 PM

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

End User Point and Click Agreement:

CPT codes, descriptions and other data only are copyright 2015 American Medical Association. All rights reserved. CPT is a registered trademark of the American Medical Association (AMA).

You, your employees and agents are authorized to use CPT only as contained in the following authorized materials of Centers for Medicare and Medicaid Services (CMS) internally within your organization within the United States for the sole use by yourself, employees and agents. Use is limited to use in Medicare, Medicaid or other programs administered by CMS. You agree to take all necessary steps to insure that your employees and agents abide by the terms of this agreement.

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

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

Figure 14 End User Point-and-Click License Agreements

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

Note: If "I Do Not Accept" is selected, the user will be returned to the Portal homepage and will not be able to access the secure Provider Portal.

10. The user's secure Provider page will be displayed.

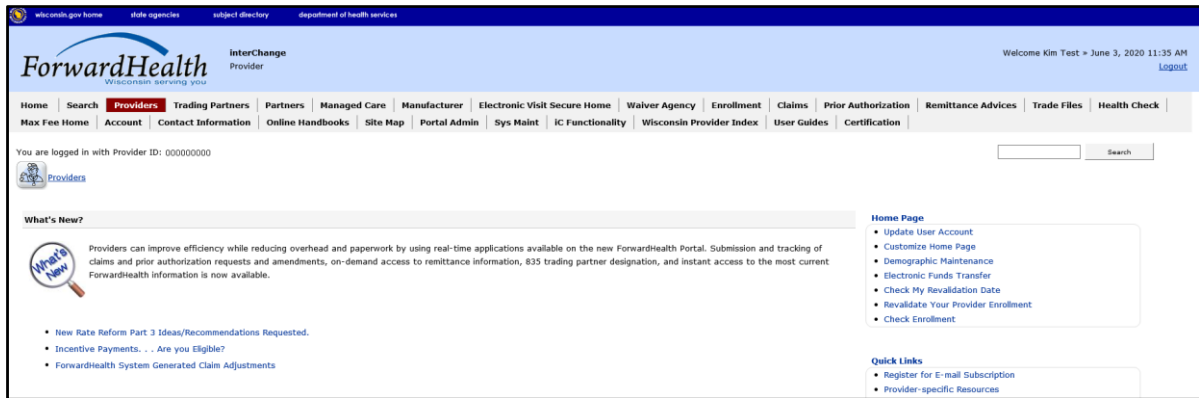
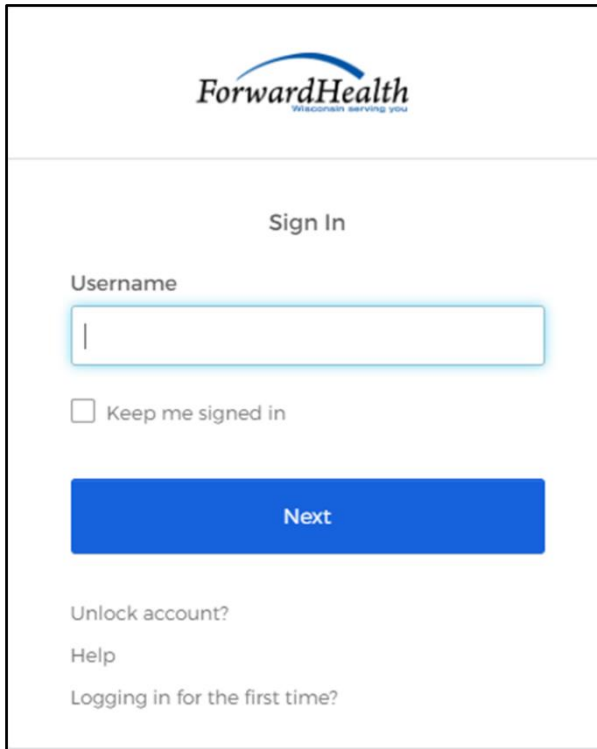


Figure 15 Secure Provider Page

### 3.3 Reset Password

1. Access the Portal at <https://www.forwardhealth.wi.gov/>.
2. Click **Login**. A Sign In box will be displayed.



ForwardHealth  
WISCONSIN SERVING YOU

Sign In

Username

Keep me signed in

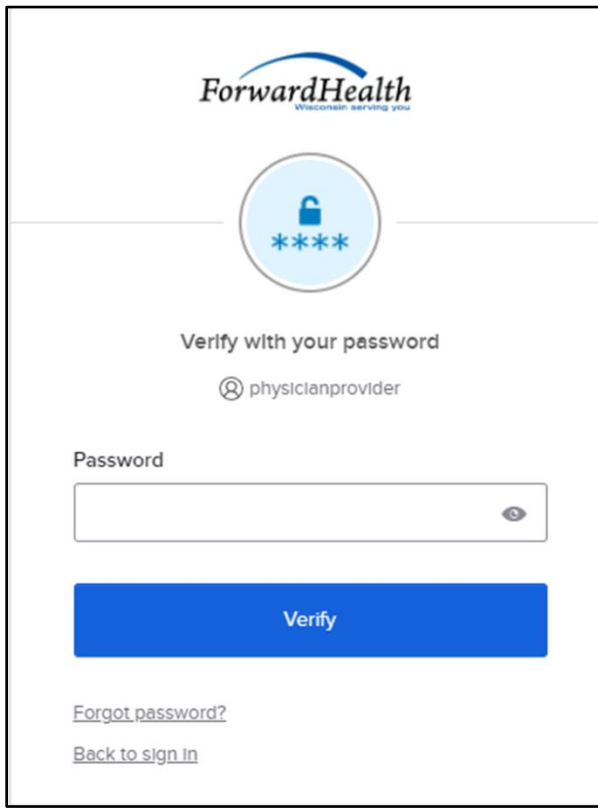
Next

Unlock account?  
Help  
Logging in for the first time?

**Figure 16** Sign In Box

3. Enter the user's username.
4. Click **Next**.

A Verify with your password box will be displayed.

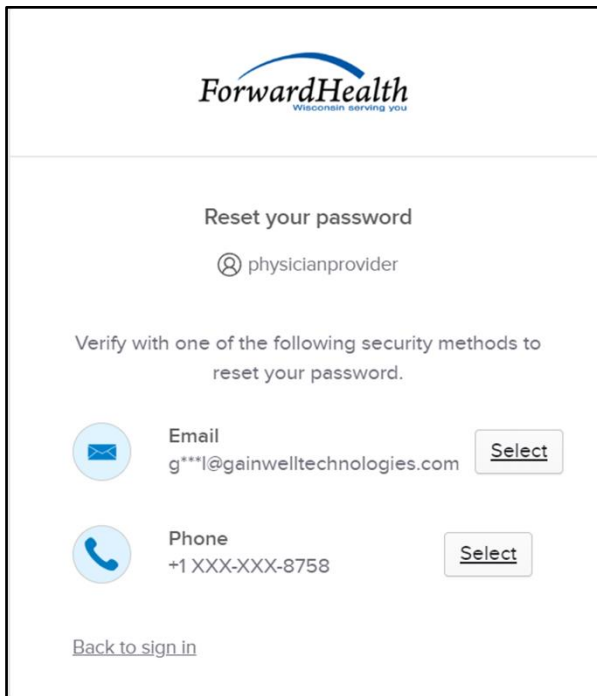


The screenshot shows a web interface for password verification. At the top is the ForwardHealth logo with the tagline 'Wisconsin serving you'. Below the logo is a circular icon containing a blue padlock and four blue asterisks. Underneath the icon, the text 'Verify with your password' is displayed. Below this text is a user identifier 'physicianprovider' with a small circular icon to its left. A 'Password' label is positioned above a white input field with a toggle icon on the right. Below the input field is a prominent blue button labeled 'Verify'. At the bottom of the form are two links: 'Forgot password?' and 'Back to sign in'.

**Figure 17** Verify With Your Password Box

5. Click **Forgot password?**

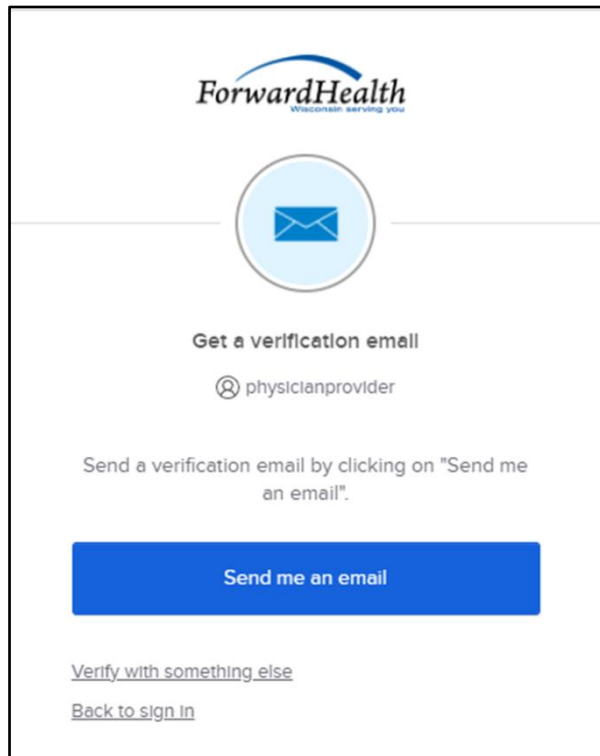
A Reset your password box will be displayed.



**Figure 18** Reset Your Password Box

6. Click **Select** to receive a verification via email or phone.

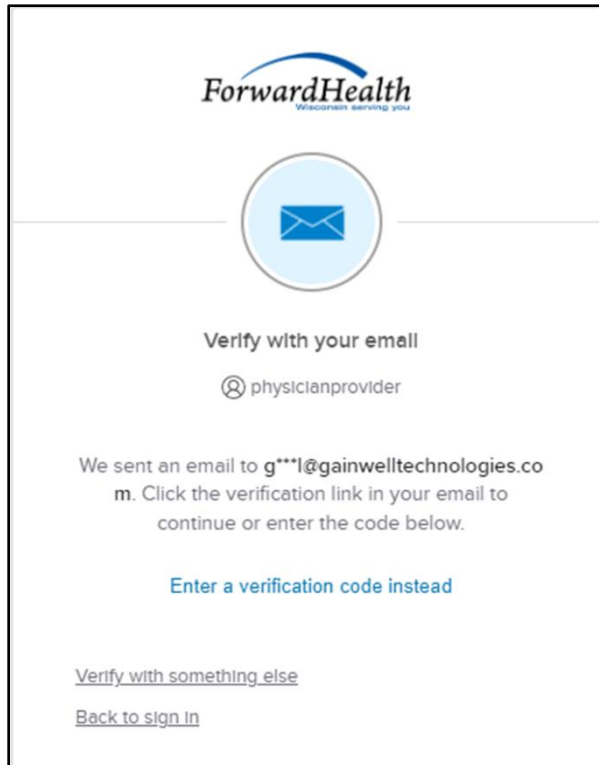
- If the user clicks **Select** for email:
  - a. A Get a verification email box will be displayed.



**Figure 19** Get A Verification Email

- b. Click **Send me an email**. Note: The user also has the option to select **Verify with something else** which will take them back to the Unlock account box or **Back to sign in** which will take them back to the sign in page.

A verify with your email box will be displayed and an email will be sent.

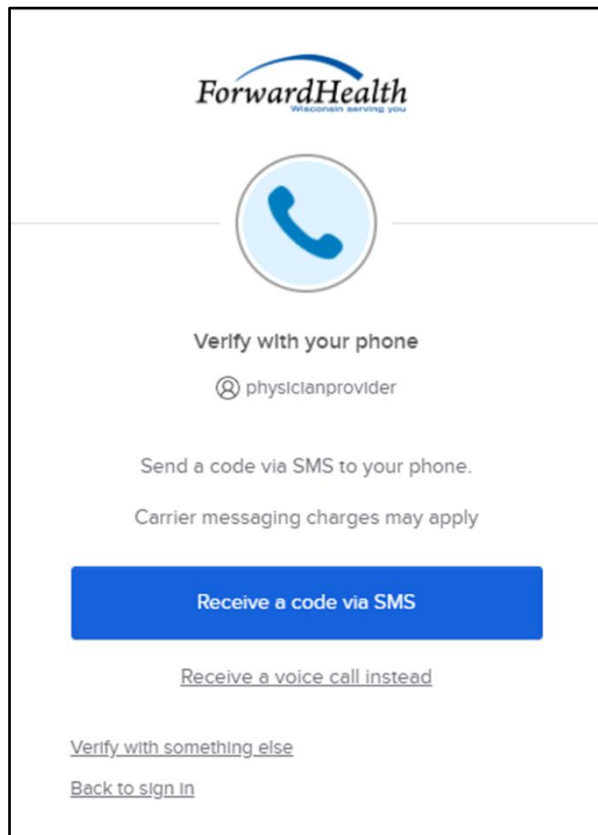


**Figure 20** Verify With Your Email Box

- c. Proceed to [Step 7](#).



- If the user clicks **Select** for phone:
  - a. A verify with your phone box will be displayed.




**Figure 21** Verify With Your Phone Box


- b. Click **Receive a code via SMS** (text) or **Receive a voice call instead**. Note: The user also has the option to select **Verify with something else**, which will take them back to the Unlock account box, or **Back to sign in**, which will take them back to the sign in page.

A Verify with your phone box will be displayed.

**ForwardHealth**  
Wisconsin serving you



**Verify with your phone**

 physicianprovider

A code was sent to +1 XXX-XXX-8758 . Enter the code below to verify.

Carrier messaging charges may apply

Enter Code

**Verify**

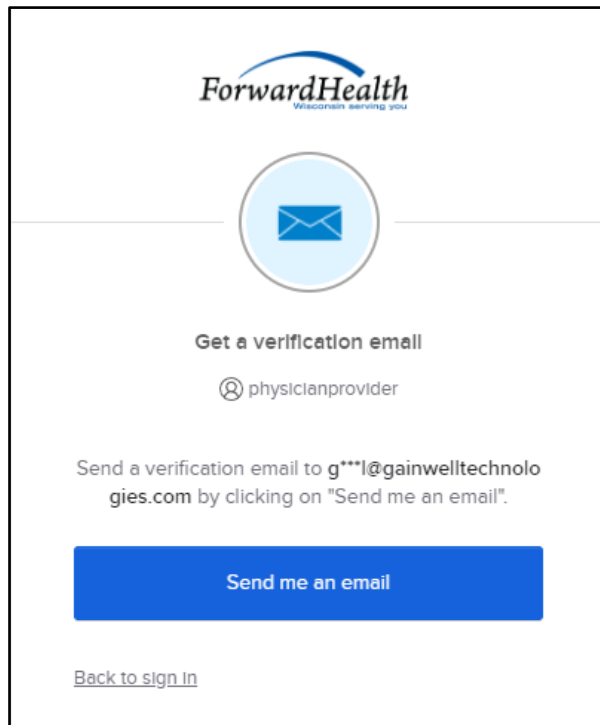
[Verify with something else](#)

[Back to sign in](#)

**Figure 22** Verify With Your Phone Box

- c. Enter the code that was sent.
- d. Click **Verify**.

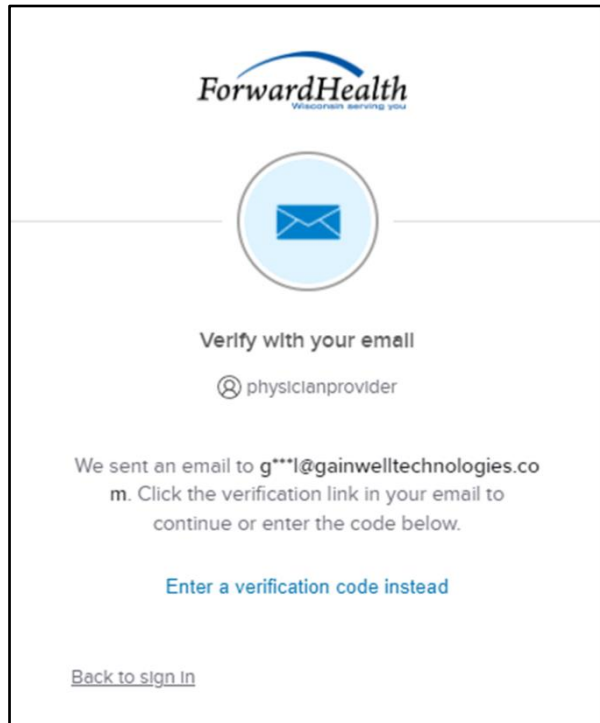
A Get a verification email box will be displayed.



**Figure 23** Get A Verification Email Box

- e. Click **Send me an email**.

A Verify with your email box will be displayed and an email will be sent.



**Figure 24** Verify With Your Email Box

- 7. The email sent to the user's email address includes a **Reset Password** link (Option 1) and a verification code (Option 2).

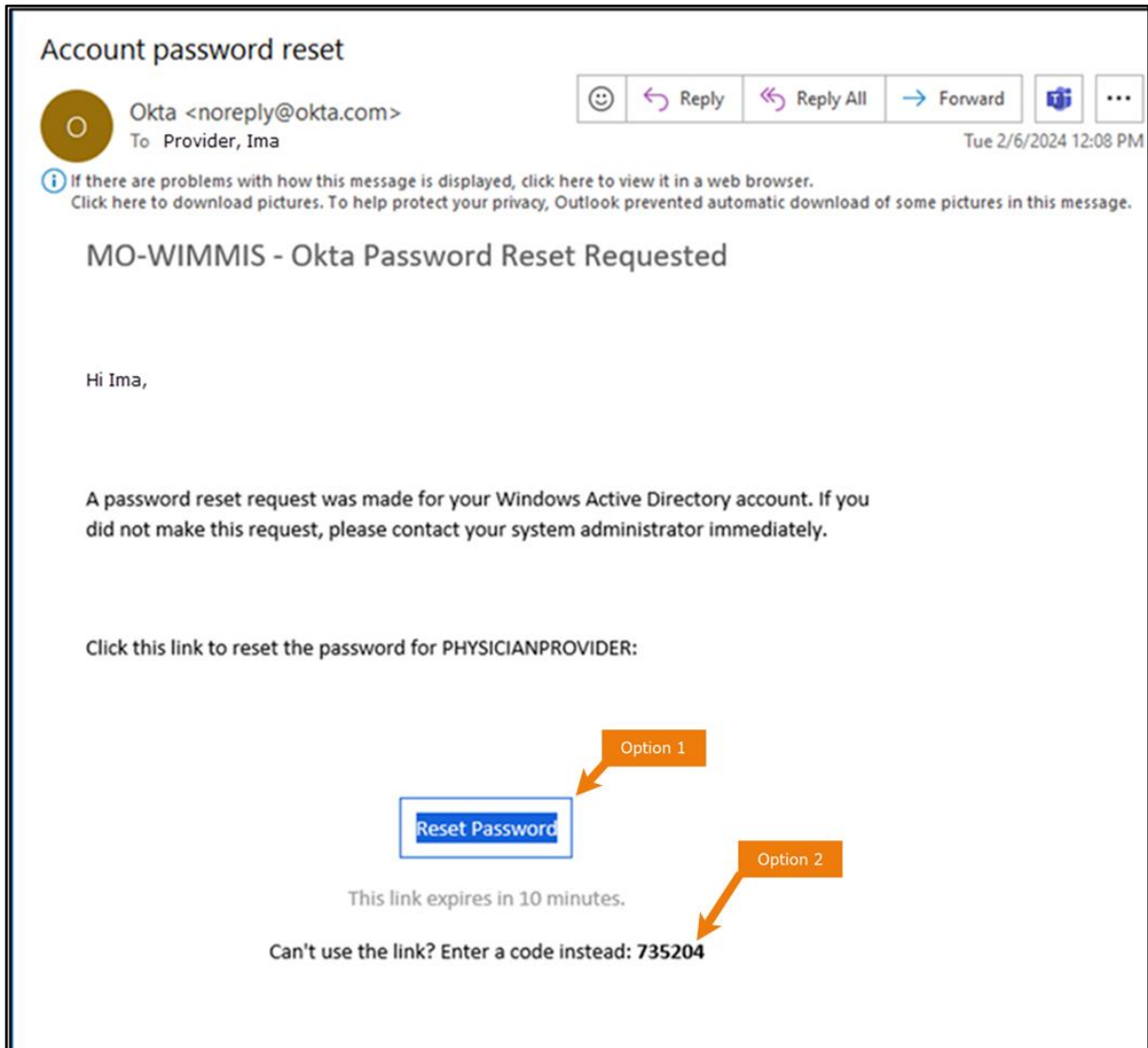
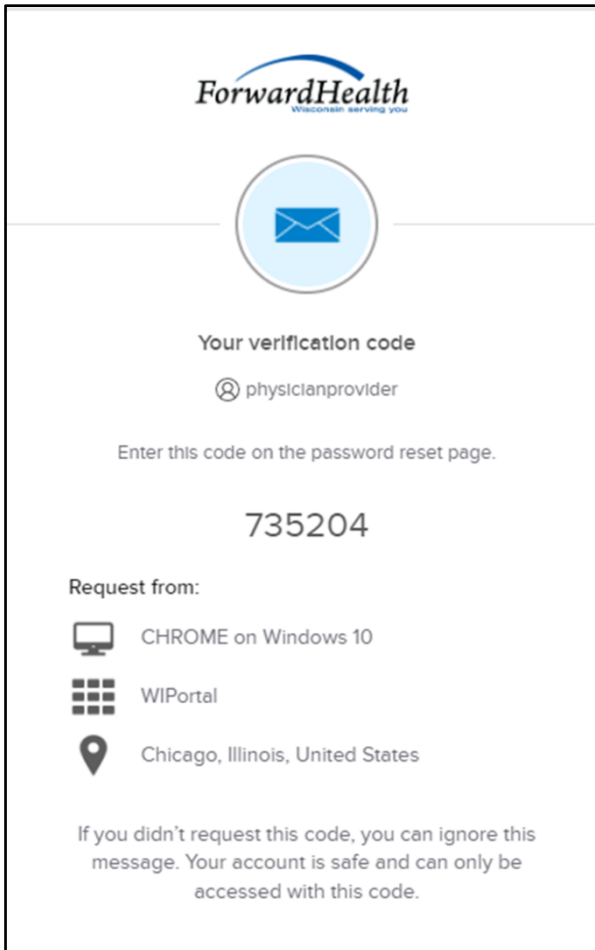


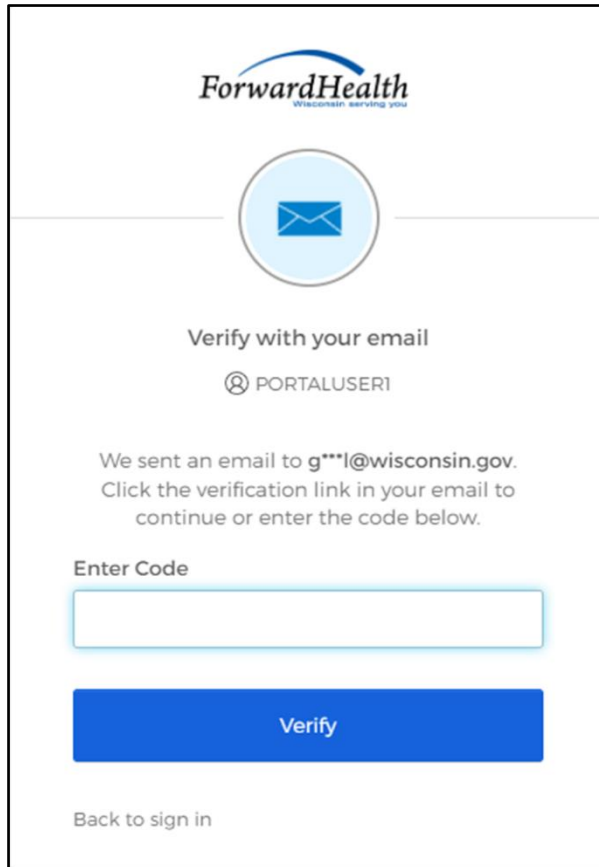
Figure 25 Account Password Reset Email

8. The user can choose to either click the **Reset Password** link (Option 1) or enter the verification code from the email (Option 2) instead.
  - Clicking the **Reset Password** link from the email will display a verification code box.




**Figure 26** Verification Code Box

9. Copy the verification code from the verification code box or from the account password reset email, return to the verify with your email box, and click **Enter a verification code instead**.
10. Enter the code from the verification code box or the code from the account password reset email and click **Verify**.



**ForwardHealth**  
Wisconsin serving you



Verify with your email

PORTALUSER1

We sent an email to g\*\*\*l@wisconsin.gov.  
Click the verification link in your email to  
continue or enter the code below.

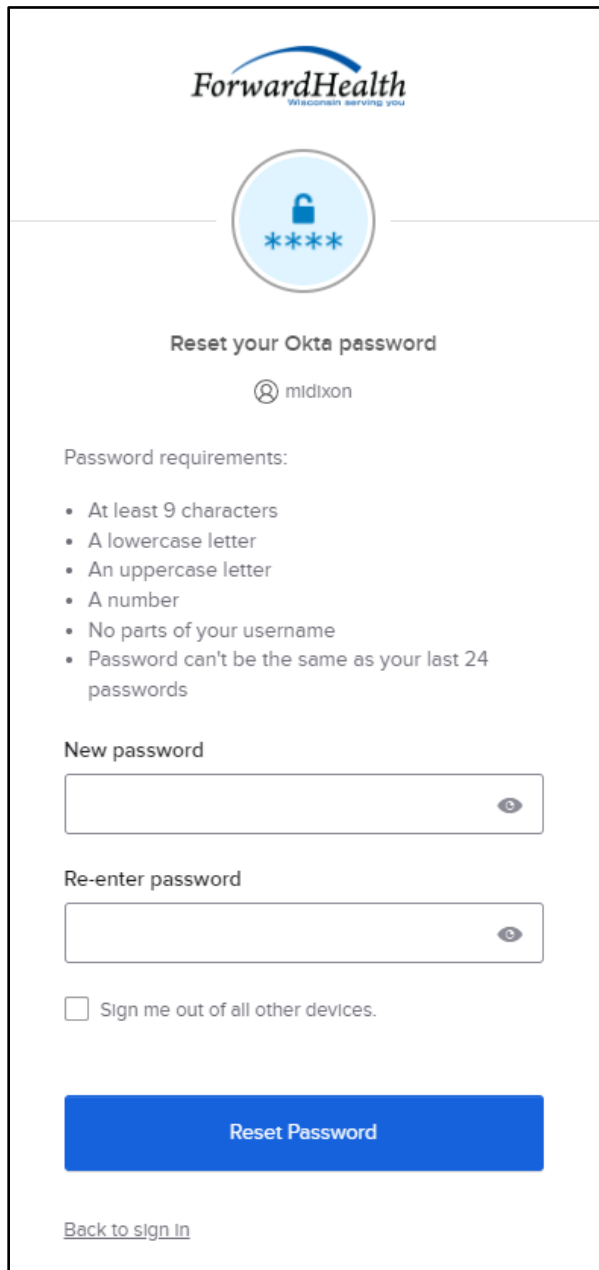
Enter Code

Verify

[Back to sign in](#)

**Figure 27** Verify With Your Email Box

The Reset your Okta password box will be displayed.



The screenshot shows a web form for resetting an Okta password. At the top is the ForwardHealth logo with the tagline 'Wisconsin serving you'. Below the logo is a circular icon containing a padlock and four asterisks. The main heading is 'Reset your Okta password' followed by the user identifier 'midixon'. A section titled 'Password requirements:' lists several criteria: at least 9 characters, a lowercase letter, an uppercase letter, a number, no parts of the username, and a password that is not the same as the last 24 passwords. There are two input fields: 'New password' and 'Re-enter password', both with toggle icons for visibility. A checkbox labeled 'Sign me out of all other devices.' is present below the input fields. A prominent blue button labeled 'Reset Password' is at the bottom, with a link for 'Back to sign in' below it.

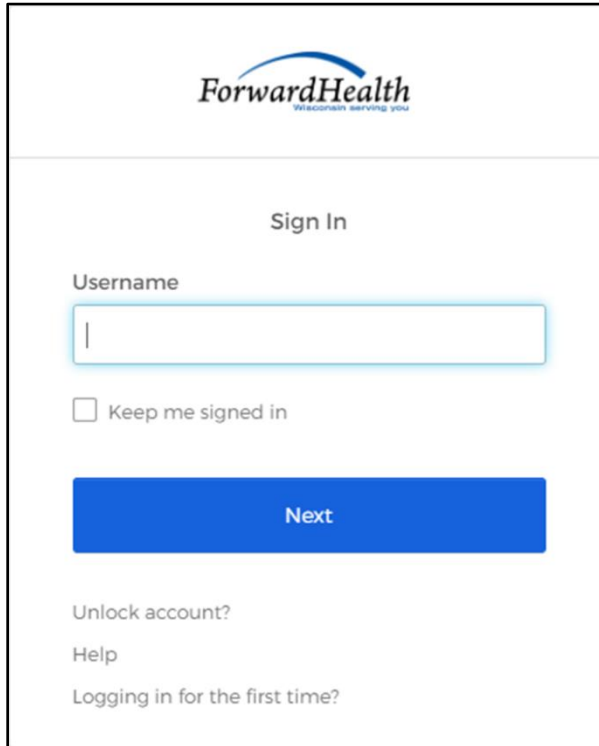
**Figure 28** Reset Your Okta Password Box

11. Enter a new password (twice for confirmation).
12. Click **Reset Password**. The password will be changed and the user will be logged in to the secure Portal.



## 3.4 Unlocking An Account

1. Access the Portal at <https://www.forwardhealth.wi.gov/>.
2. Click **Login**. A sign In box will be displayed.

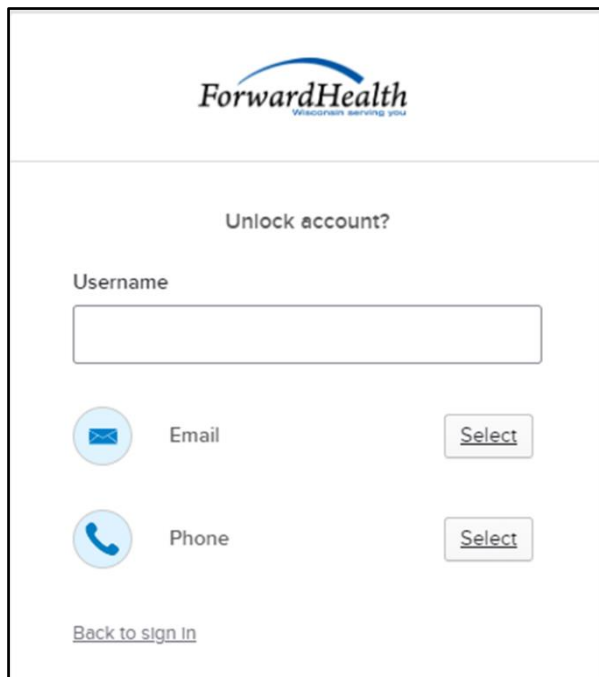


The screenshot shows the ForwardHealth sign-in interface. At the top is the ForwardHealth logo with the tagline "wisconsin working you". Below the logo is the heading "Sign In". There is a text input field labeled "Username" with a vertical cursor. Below the input field is a checkbox labeled "Keep me signed in". A blue button labeled "Next" is positioned below the checkbox. At the bottom of the form are three links: "Unlock account?", "Help", and "Logging in for the first time?".

**Figure 29** Sign In Box

3. Click **Unlock account?**

An Unlock account box will be displayed.

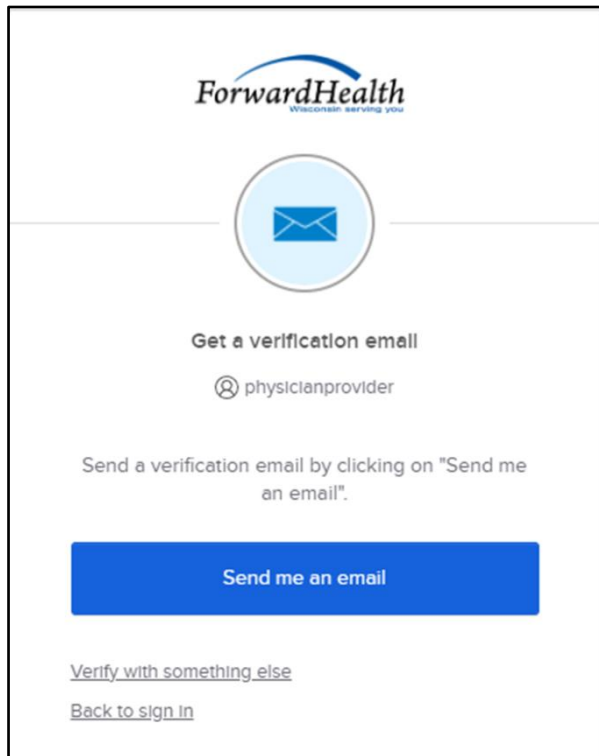


The screenshot shows the ForwardHealth logo at the top, with the tagline "Wisconsin serving you". Below the logo is the heading "Unlock account?". Underneath is a "Username" label followed by a text input field. Below the input field are two options: "Email" with an envelope icon and a "Select" button, and "Phone" with a telephone icon and a "Select" button. At the bottom left is a link that says "Back to sign in".

**Figure 30** Unlock Account Box

4. Enter the user's username.
5. Click **Select** to receive a verification via email or phone.

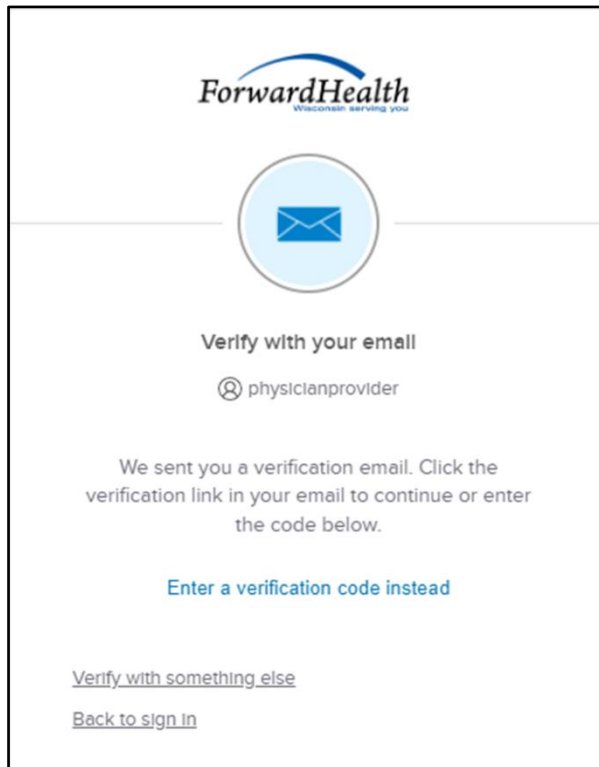
- If the user clicks **Select** for email:
  - a. A Get a verification email box will be displayed.



**Figure 31** Get A Verification Email

- b. Click **Send me an email**. Note: The user also has the option to select **Verify with something else** which will take them back to the Unlock account box or **Back to sign in** which will take them back to the sign in page.

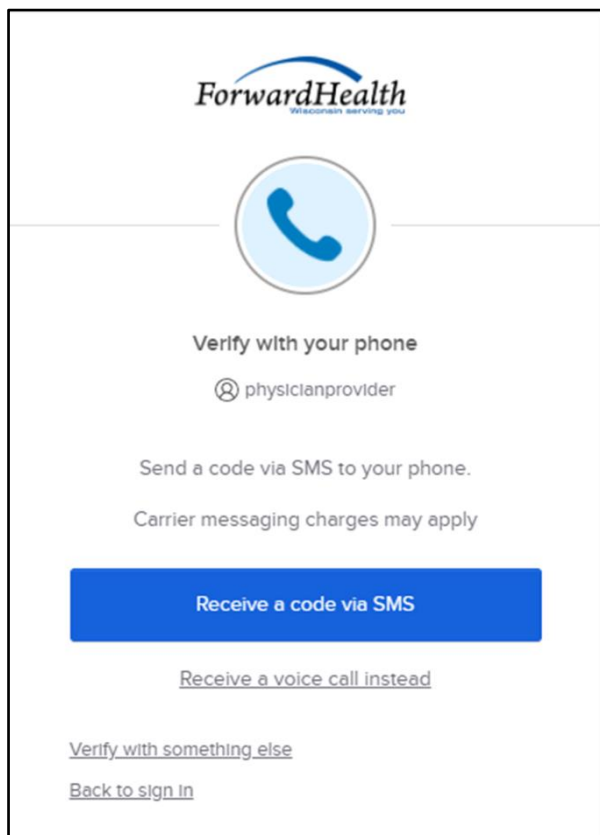
A verify with your email box will be displayed and an email will be sent.



**Figure 32** Verify With Your Email Box

- c. Proceed to [Step 6](#).

- If the user clicks **Select** for phone:
  - a. A verify with your phone box will be displayed.




**Figure 33** Verify With Your Phone Box

- b. Click **Receive a code via SMS** (text) or **Receive a voice call instead**. Note: The user also has the option to select **Verify with something else**, which will take them back to the Unlock account box, or **Back to sign in**, which will take them back to the sign in page.

A Verify with your phone box will be displayed.

**ForwardHealth**  
Wisconsin serving you



**Verify with your phone**  
@ physicianprovider

A code was sent to your phone . Enter the code below to verify.

Carrier messaging charges may apply

Enter Code

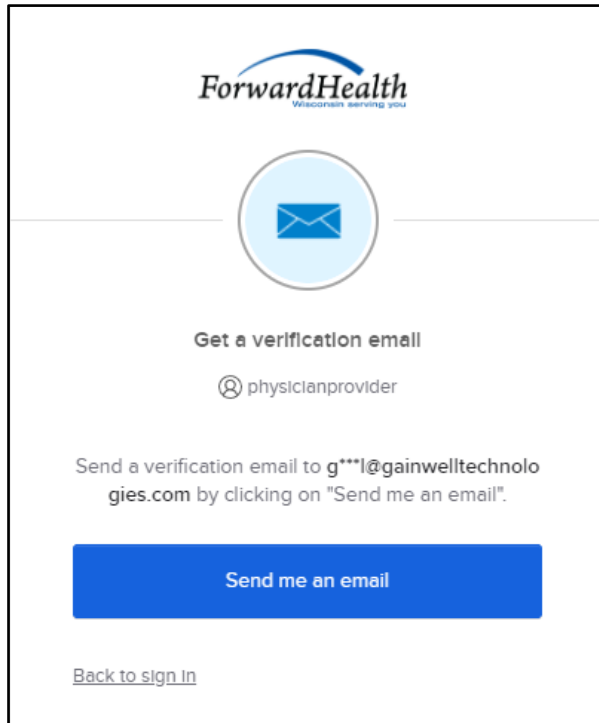
**Verify**

[Verify with something else](#)  
[Back to sign in](#)

**Figure 34** Verify With Your Phone Box

- c. Enter the code that was sent.
- d. Click **Verify**.

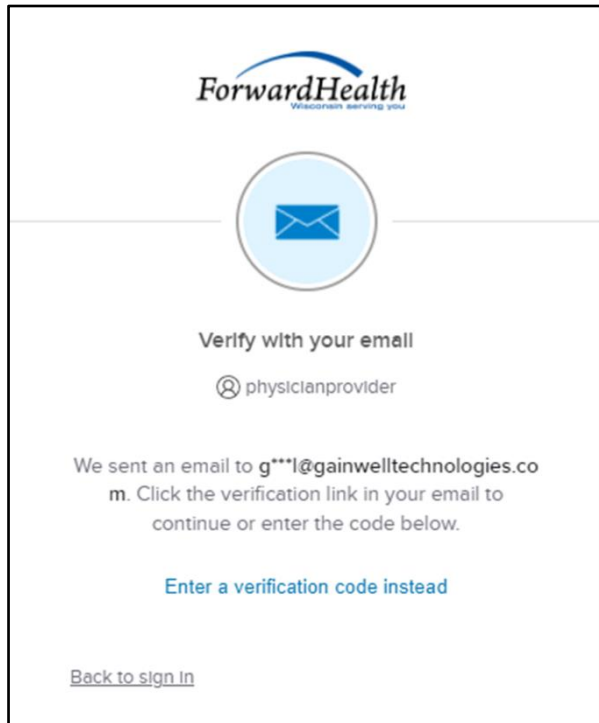
A Get a verification email box will be displayed.



**Figure 35** Get a Verification Email Box

- e. Click **Send me an email**.

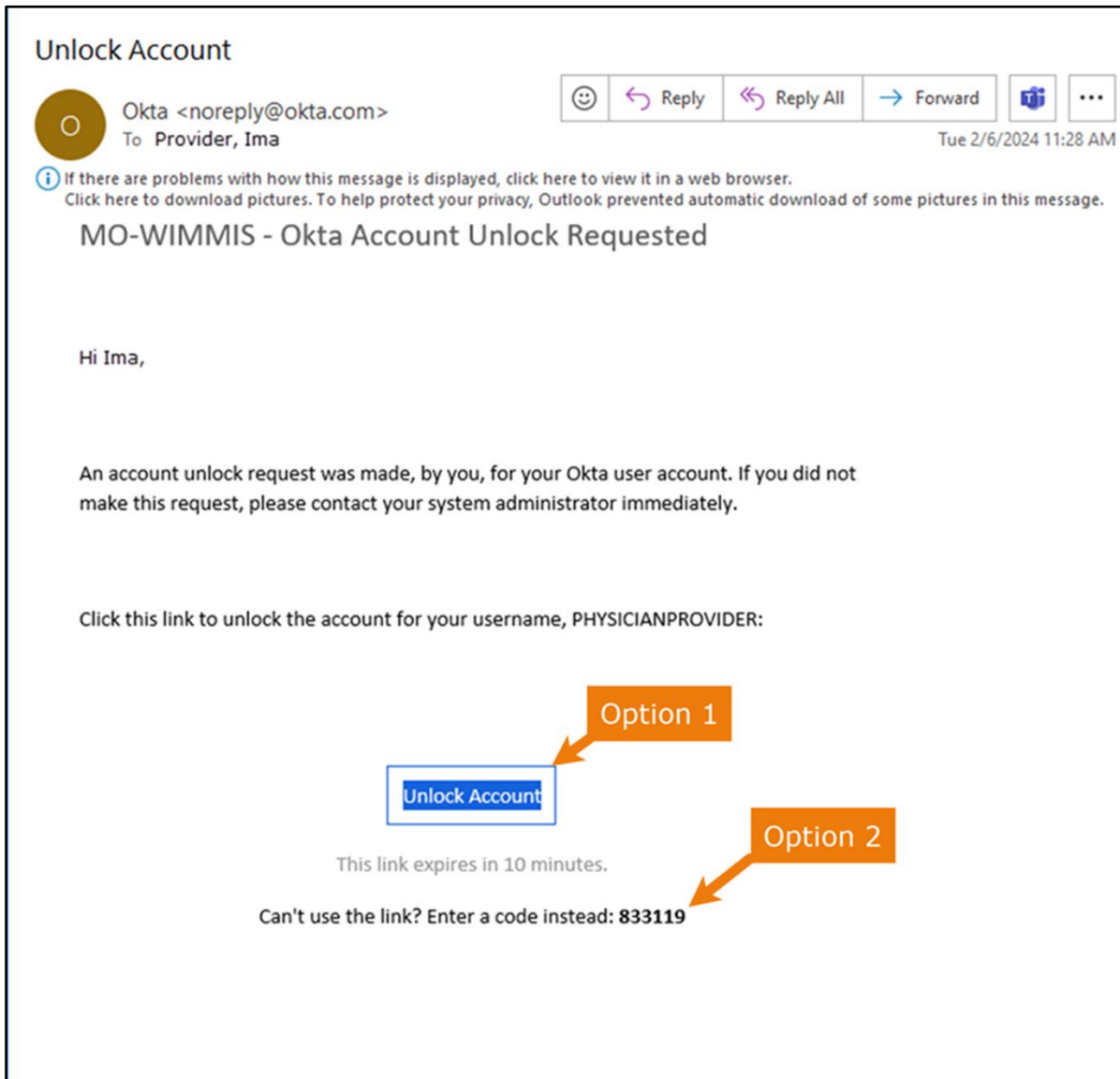
A Verify with your email box will be displayed and an email will be sent.



**Figure 36** Verify With Your Email Box



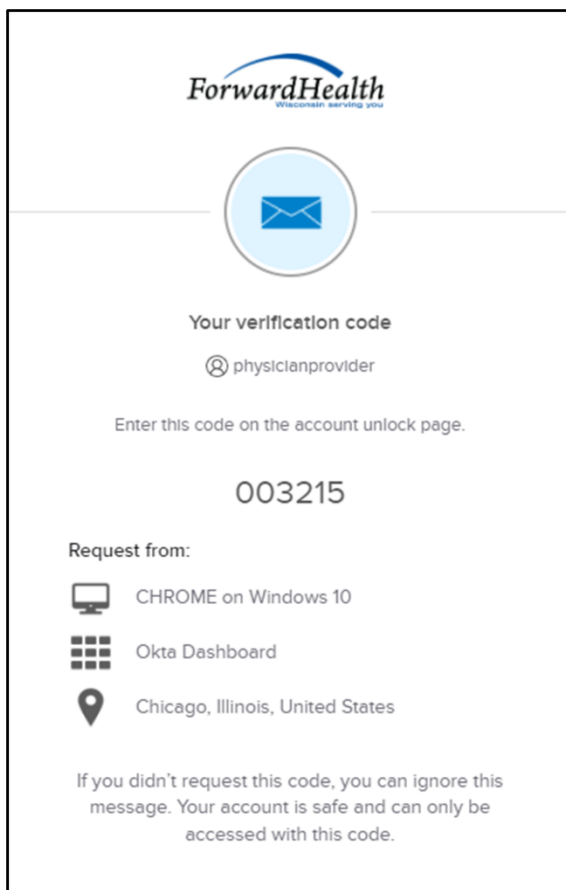
- 6. The email sent to the user’s email address includes an **Unlock Account** link (Option 1) and a verification code (Option 2).



**Figure 37** One-Time Verification Code Email

- 7. The user can choose to either click the **Unlock Account** link (Option 1) or enter the verification code from the email (Option 2) instead.

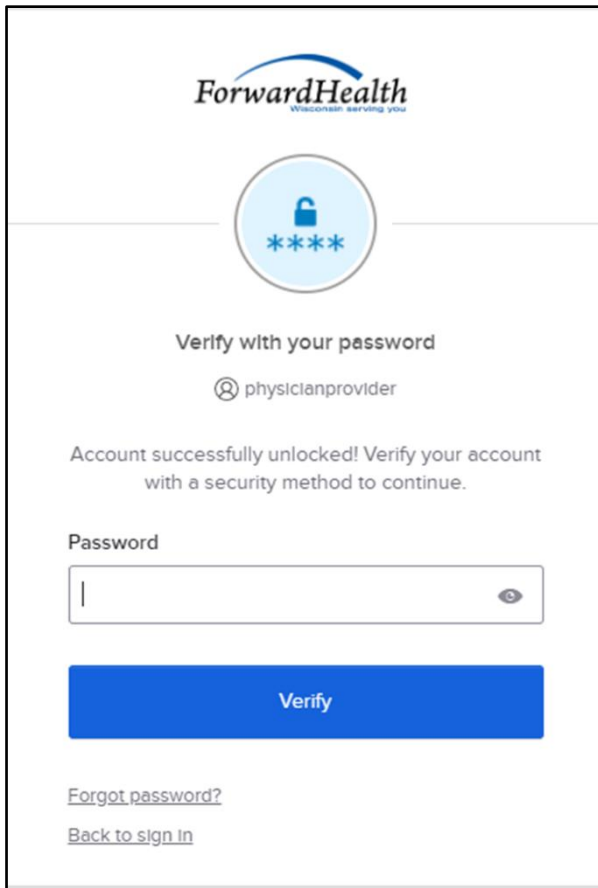
- Clicking the **Unlock Account** link from the email will display a verification code box.



**Figure 38** Verification Code Box

8. Copy the verification code from the verification code box or from the unlock account email, return to the verify with your email box, and click **Enter a verification code instead**.
9. Enter the code from the verification code box or from the unlock account email and click **Verify**.

A Verify with your password box will be displayed with a message stating the account has been successfully unlocked.



**Figure 39** Verification Code Box

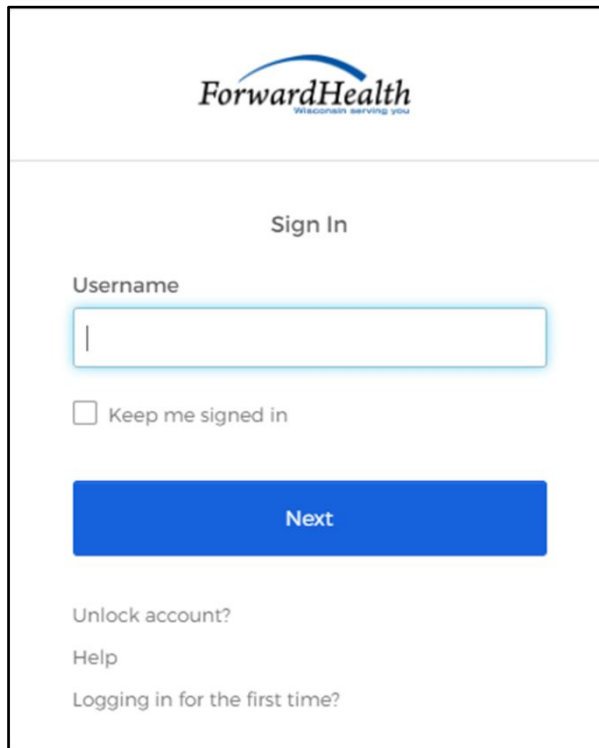
10. Click **Back to sign in** to log in.

# 4 Maintenance

Users may change account information such as contact name, phone number, or email address through the Maintenance link on the Account homepage.

## 4.1 Change Account Information

1. Access the Portal at <https://www.forwardhealth.wi.gov/>.
2. Click **Login**. A Sign In box will be displayed.



ForwardHealth  
WISCONSIN SERVING YOU

Sign In

Username

Keep me signed in

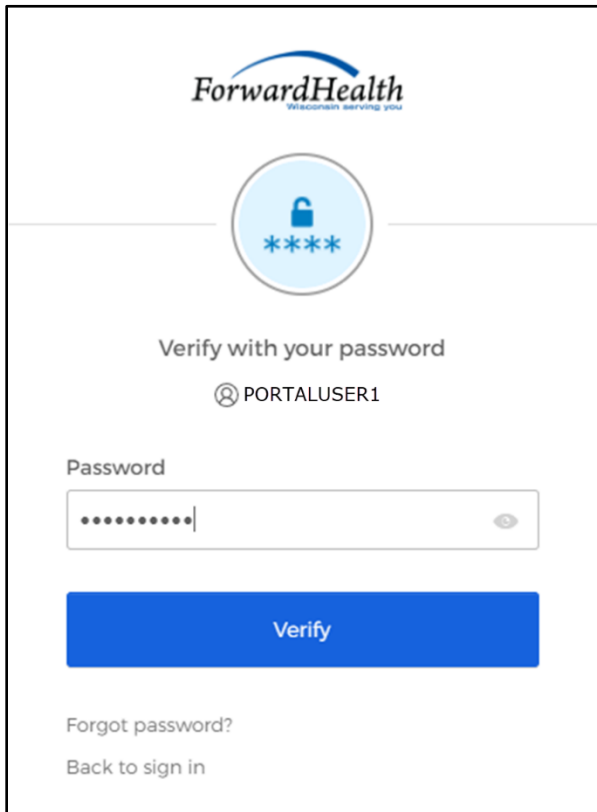
Next

Unlock account?  
Help  
Logging in for the first time?

**Figure 40** Sign In Box

3. Enter the user's username.
4. Click **Next**.

A Verify with your password box will be displayed.



The screenshot shows the ForwardHealth login verification screen. At the top is the ForwardHealth logo with the tagline "Mission serving you". Below the logo is a circular icon containing a padlock and four asterisks. The text "Verify with your password" is centered below the icon. Underneath, the username "PORTALUSER1" is displayed with a small circular icon to its left. A "Password" label is positioned above a text input field that contains eight dots and a cursor. To the right of the input field is a toggle icon for password visibility. A large blue "Verify" button is centered below the input field. At the bottom left, there are two links: "Forgot password?" and "Back to sign in".

**Figure 41** Verify With Your Password Box

5. Enter the user's password. The user's password is case sensitive. Make certain to enter it exactly.
6. Click **Verify**.

The secure Provider page will be displayed.

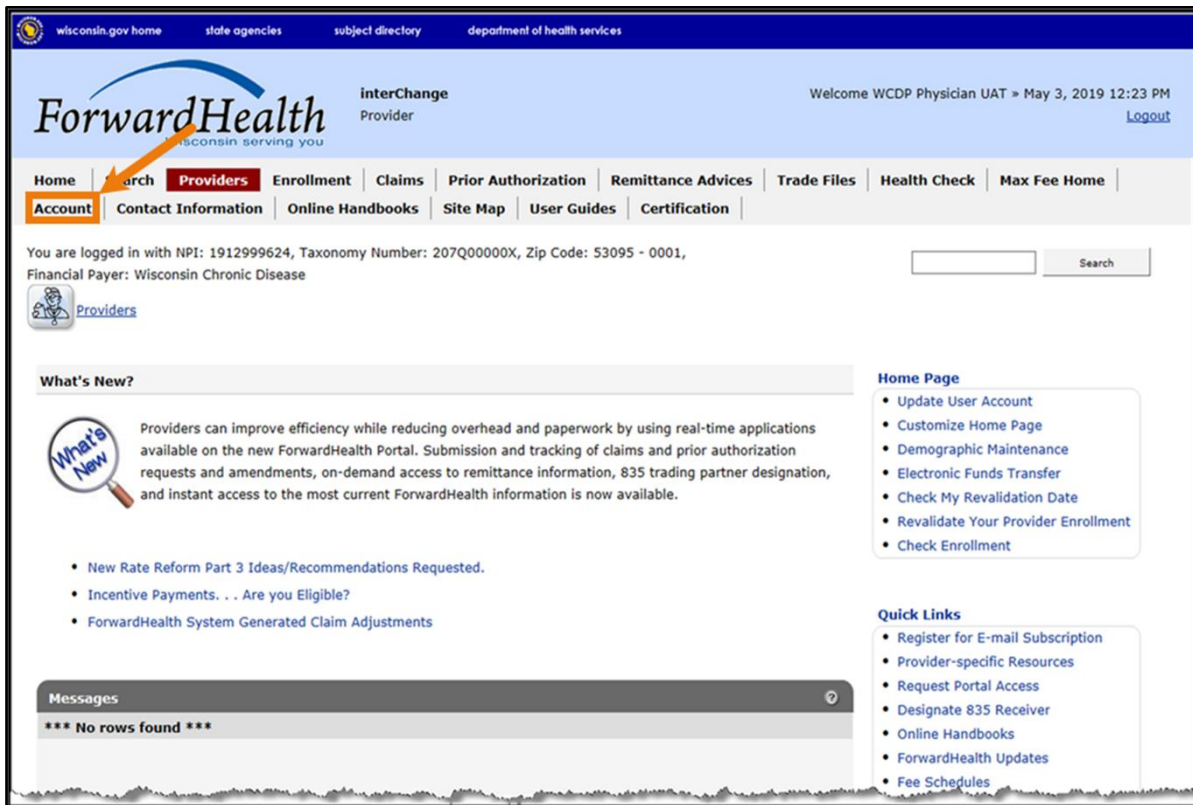


Figure 42 Secure Provider Homepage

7. Click **Account** on the main menu at the top of the page. The Account Home page will be displayed.

### Account Home

From this page, authorized users can manage their user account(s) for the ForwardHealth Portal. Users may 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.

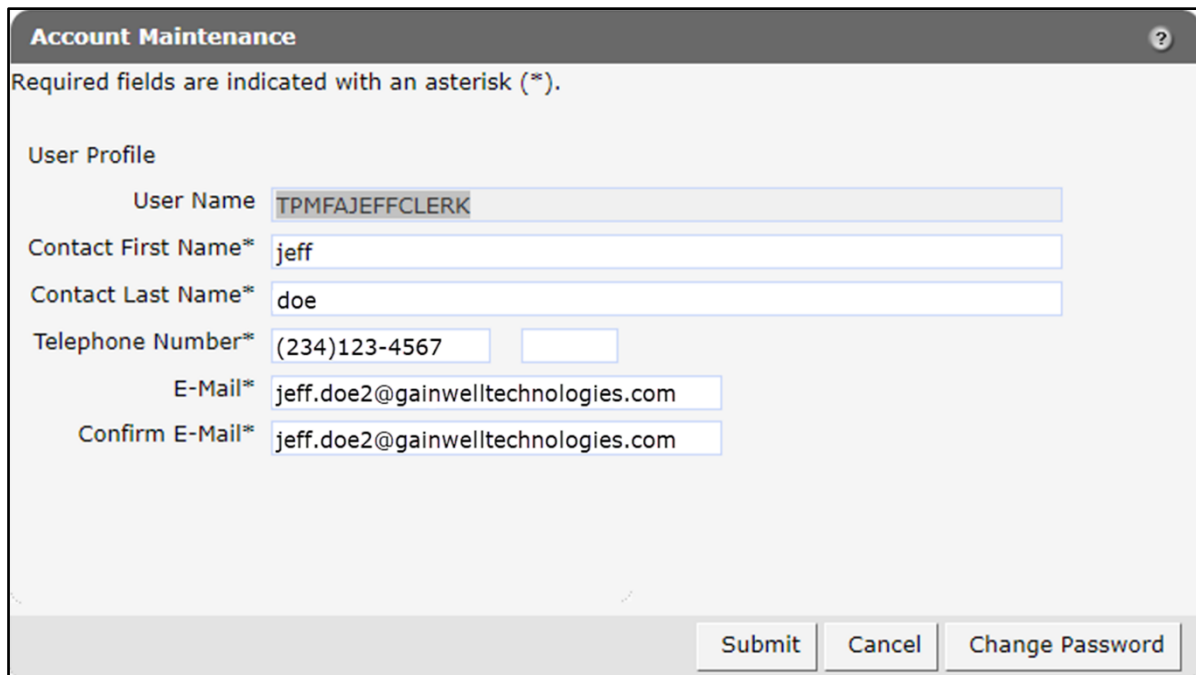
**What would you like to do?**

- [Setup](#)
- [Maintenance](#)
- [Administrator Backup Information](#)
- [Messages](#)
- [Change Password](#)
- [Reset Password](#)
- [Clerk Maintenance](#)
- [Clerk Last Logon](#)
- [Waiver Clerk Access Search](#)
- [MCO Universe Management](#)
- [DSS Universe Management](#)
- [Switch Manufacturer](#)
- [Switch Organization](#)
- [Internal Switch Organization](#)
- [Tester Switch Organization](#)
- [Switch App Tester Partner Role](#)
- [Switch Partner Role](#)
- [Add Organization](#)
- [View the Account User Guide](#)

**Figure 43** Account Home Page

Various account management functions can be performed using the links on the Account Home page.

- Click **Maintenance**. The Account Maintenance panel will be displayed.



**Account Maintenance** ?

Required fields are indicated with an asterisk (\*).

User Profile

User Name

Contact First Name\*

Contact Last Name\*

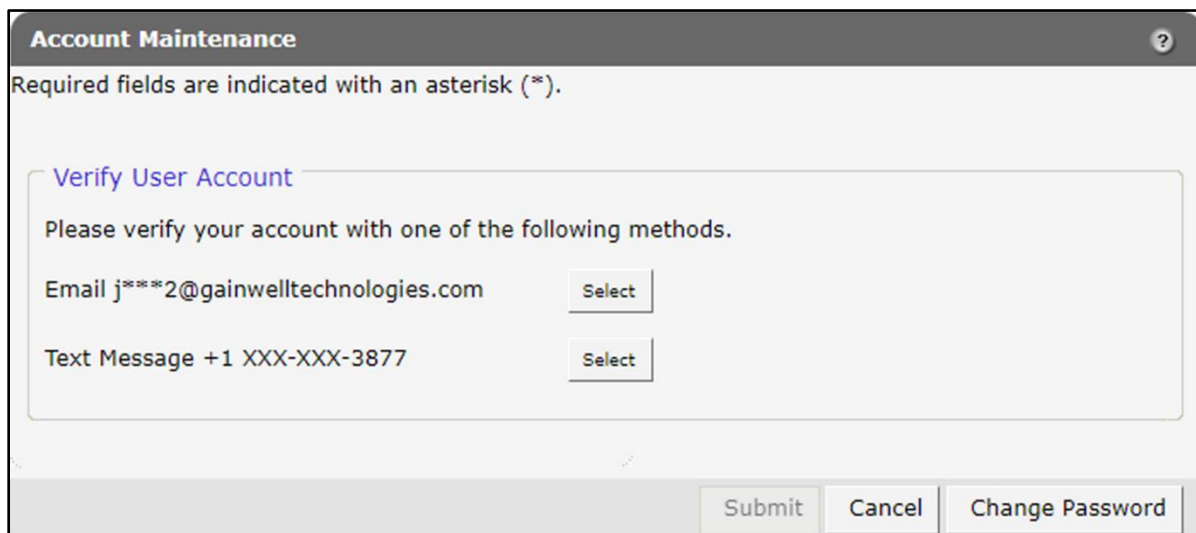
Telephone Number\*

E-Mail\*

Confirm E-Mail\*

**Figure 44** Account Maintenance Panel

- Make applicable changes.
- Click **Submit**. An Account Maintenance verification panel will be displayed if the phone number or email address were changed.



**Account Maintenance** ?

Required fields are indicated with an asterisk (\*).

**Verify User Account**

Please verify your account with one of the following methods.

Email j\*\*\*\*2@gainwelltechnologies.com

Text Message +1 XXX-XXX-3877

**Figure 45** Account Maintenance Panel – Verify User Account



11. Select the email or text message to verify the account by clicking **Select** after the appropriate method. An Account Maintenance verification panel will be displayed.



**Account Maintenance** ?

Required fields are indicated with an asterisk (\*).

Verify with your email

Verify with code sent to j\*\*\*\*2@gainwelltechnologies.com

Send me an email

[Verify with something else](#)

Submit Cancel Change Password

**Figure 46** Account Maintenance Panel – Email or Text Message Verification

12. Click **Send me an email** for an email or **Receive a code via SMS** for a text. Note: Clicking **Verify with something else** will direct the user back to the verify user account screen allowing verification by either email or text message.
13. Enter the code in the Account Maintenance verification panel.



**Account Maintenance** ?

Required fields are indicated with an asterisk (\*).

Verify with your email

Verify with code sent to j\*\*\*\*2@gainwelltechnologies.com

Enter Code

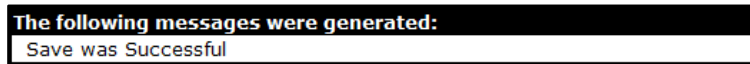
Verify

[Verify with something else](#)

Submit Cancel Change Password

**Figure 47** Account Maintenance Panel – Enter Code

14. Click **Verify**. A confirmation message will be displayed.



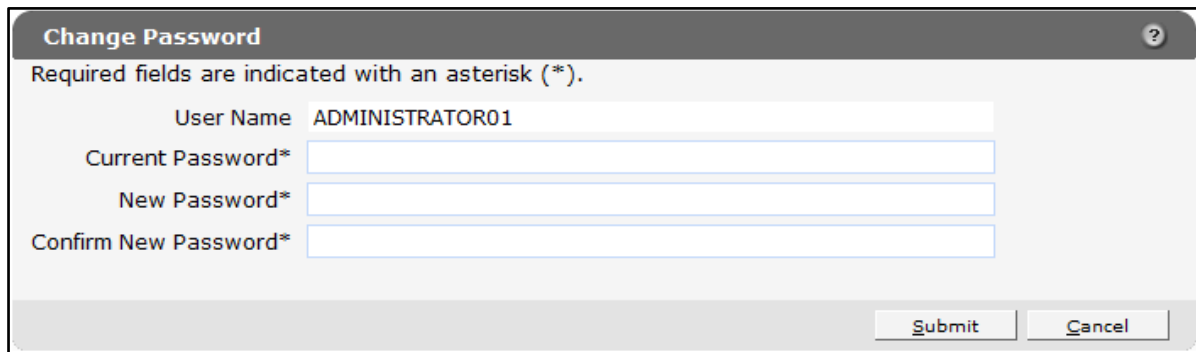
**Figure 48** Confirmation Message

# 5 Change Password

Users will be prompted to change their Portal account passwords every 60 days; however, through the Change Password function, users can change their password at any time.

Note: The Change Password link on the Account Home page serves the same purpose as the Change Password button on the Account Maintenance page.

1. On the Account Home page, click **Change Password**. The Change Password page will be displayed.



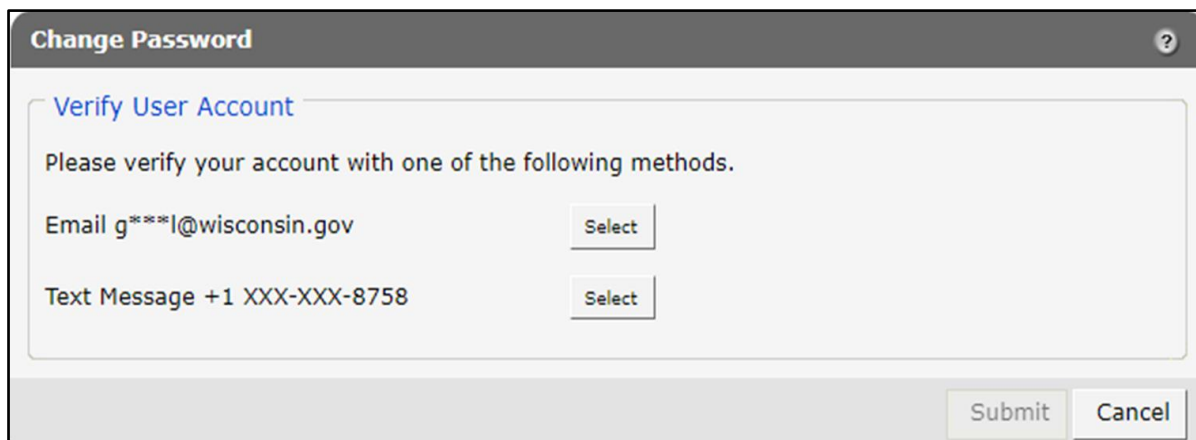
The screenshot shows a 'Change Password' dialog box. At the top, it says 'Change Password' with a help icon. Below that, it states 'Required fields are indicated with an asterisk (\*)'. The form contains four input fields: 'User Name' with the value 'ADMINISTRATOR01', 'Current Password\*', 'New Password\*', and 'Confirm New Password\*'. At the bottom right, there are 'Submit' and 'Cancel' buttons.

**Figure 49** Change Password Page

2. Enter the user's current password.
3. Enter the user's new password (twice for confirmation). The password must be between nine–15 characters and must contain three different types of characters such as uppercase letters, lowercase letters, special characters, or numbers. The password must be unique and cannot contain information from the user name, contact first name, or contact last name.

Note: The new password cannot match any of the last 24 passwords.

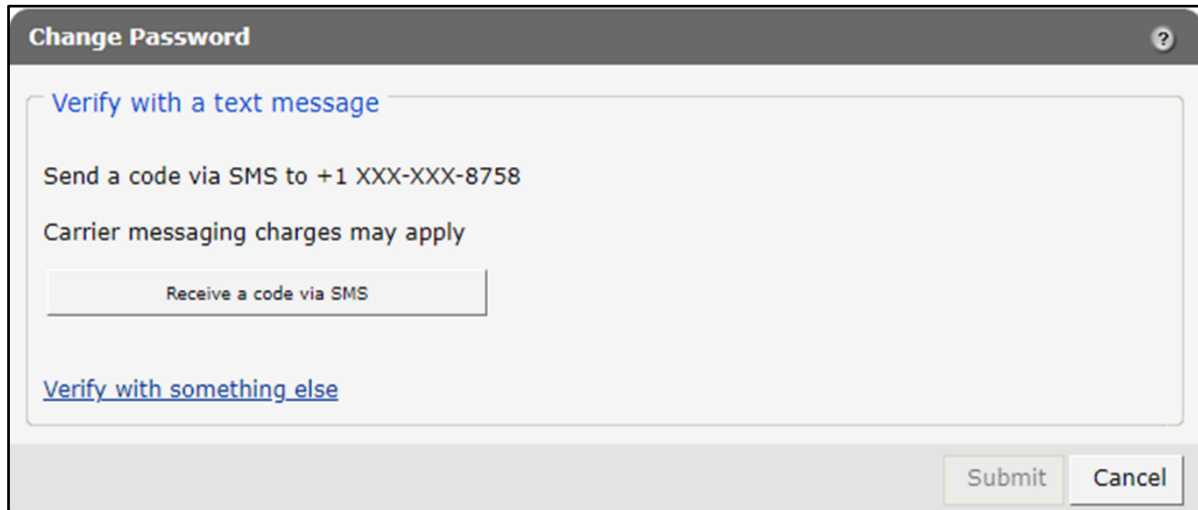
4. Click **Submit**. A Change Password verification panel will be displayed.



The screenshot shows a 'Change Password' dialog box with a 'Verify User Account' section. It says 'Please verify your account with one of the following methods.' There are two options: 'Email g\*\*\*l@wisconsin.gov' and 'Text Message +1 XXX-XXX-8758', each with a 'Select' button. At the bottom right, there are 'Submit' and 'Cancel' buttons.

**Figure 50** Change Password Panel – Verify User Account

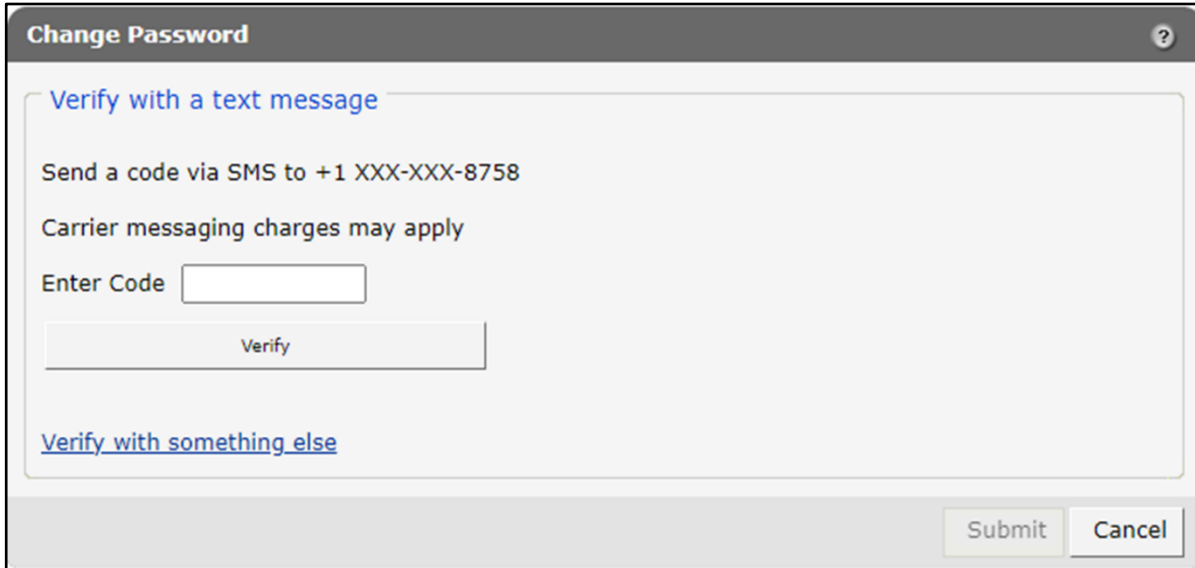
5. Select the email or text message to verify the account by clicking **Select** after the appropriate method. A Change Password verification panel will be displayed.



The screenshot shows a 'Change Password' dialog box. At the top, it says 'Change Password' with a help icon. Below that, there's a section titled 'Verify with a text message'. Under this section, it says 'Send a code via SMS to +1 XXX-XXX-8758' and 'Carrier messaging charges may apply'. There is a button labeled 'Receive a code via SMS'. Below this, there is a link that says 'Verify with something else'. At the bottom right of the dialog box, there are two buttons: 'Submit' and 'Cancel'.

**Figure 51** Change Password Panel – Email or Text Message Verification

6. Click **Receive a code via SMS** for a text or **Send me an email** for an email. Note: Clicking **Verify with something else** will direct the user back to the verify user account screen allowing verification by either email or text message.
7. Enter the code in the Change Password verification panel.



The screenshot shows the same 'Change Password' dialog box as in Figure 51, but now it is in the 'Enter Code' step. The 'Receive a code via SMS' button is no longer present. Instead, there is a text input field labeled 'Enter Code' with a small cursor. Below the input field is a button labeled 'Verify'. The 'Verify with something else' link and the 'Submit' and 'Cancel' buttons at the bottom remain the same.

**Figure 52** Change Password Panel – Enter Code

8. Click **Verify**. A confirmation message will be displayed.

**The following messages were generated:**  
Change Password - Save was Successful

**Figure 53** Confirmation Message

## 6 Clerk Maintenance

If more than one person will be working on the account, clerk accounts must be established and roles assigned for the various functions the clerks will be performing.

Note: Clerk users with established accounts that have been inactive for at least 60 days will be notified as follows:

- Inactive for 60 days—Notification will be sent indicating clerk inactivity.
- Inactive for 80 days—Notification will be sent pending automatic removal.

Accounts will automatically be removed after 90 days of inactivity.

On the Account page, click **Clerk Maintenance**. The Clerk Maintenance Search panel will be displayed.

The screenshot shows a web interface titled "Clerk Maintenance Search". It is divided into three main sections:

- Search Criteria:** Contains four input fields: Username, First Name, Last Name, and Email Address. To the right of these fields are two buttons: "Search" and "Clear".
- Search Results:** A grey bar containing the text "\*\*\* No rows found \*\*\*".
- Selected Clerk:** Contains five input fields: Username, Contact First Name, Contact Last Name, Telephone Number (with a separate "Ext." field), and E-Mail. To the right of these fields are two buttons: "Remove Clerk" and "Reset Password".

At the bottom of the panel, there are two buttons: "Add Clerk" and "Cancel".

**Figure 54** Clerk Maintenance Search Panel

Through the Clerk Maintenance panels, users with administrative and clerk administrative accounts can search for, add, or remove clerks; assign clerk roles; and reset a clerk's password.

Note: Users with clerk administrative accounts may not administer their own accounts or other administrative or clerk administrative accounts.

## 6.1 Add a Clerk

The Add Clerk function allows the user to add new clerks to a provider organization and to assign specific roles.

1. Click **Add Clerk** located at the bottom of the Clerk Maintenance Search panel. The Clerk Account panel will be displayed.

The screenshot shows a web form titled "Clerk Account" with a help icon in the top right corner. Below the title, it states "Required fields are indicated with an asterisk (\*)." and lists a password requirement: "Password must contain one uppercase letter, one number and at least 8 characters."

The form is divided into two main sections:

- Clerk Details:** This section contains several input fields, all marked with an asterisk to indicate they are required:
  - User Name\* [ Search ]
  - Contact First Name\*
  - Contact Last Name\*
  - Telephone Number\* (with an adjacent "Ext." field)
  - E-Mail\*
  - Confirm E-Mail\*
  - Password\*
  - Confirm Password\*
- Clerk Roles:** This section features two columns: "Available Roles" and "Assigned Roles". The "Available Roles" list includes: 835 Designation, Claim Submission, Claims - View Only, Demographic Maint, EFT, EHR Incentive, Eligibility, Express Enrollment, HealthCheck, and Hospice. Between the columns are navigation buttons: a left arrow (<), a double left arrow (<<), a right arrow (>), and a double right arrow (>>). Below the "Available Roles" list is a checkbox labeled "Clerk Administrator".

At the bottom of the form, there are three buttons: "Previous", "Submit", and "Cancel".

**Figure 55** Clerk Account Panel

Complete the following steps to add a new clerk account:

- Enter a user name. The user name must be between six–20 characters and can only contain letters and numbers. The user name is not case-sensitive.
- Enter the new clerk’s contact first name and contact last name.
- Enter the new clerk’s phone number (and extension, if applicable).

- Enter the new clerk’s email (twice for confirmation).
- Enter an initial password for the new clerk (twice for confirmation).

The password must be between nine–15 characters and must contain three different types of characters such as uppercase letters, lowercase letters, special characters, or numbers. The password must be unique and cannot contain information from the user name, contact first name, or contact last name.

Note: Clerks must change the password set up by the administrative account the first time they log in.

If adding a clerk account that has already been created but needs to be added to a new organization, complete the following steps:

- Click **Search** to the right of the User Name field. The User Name Search box will be displayed.

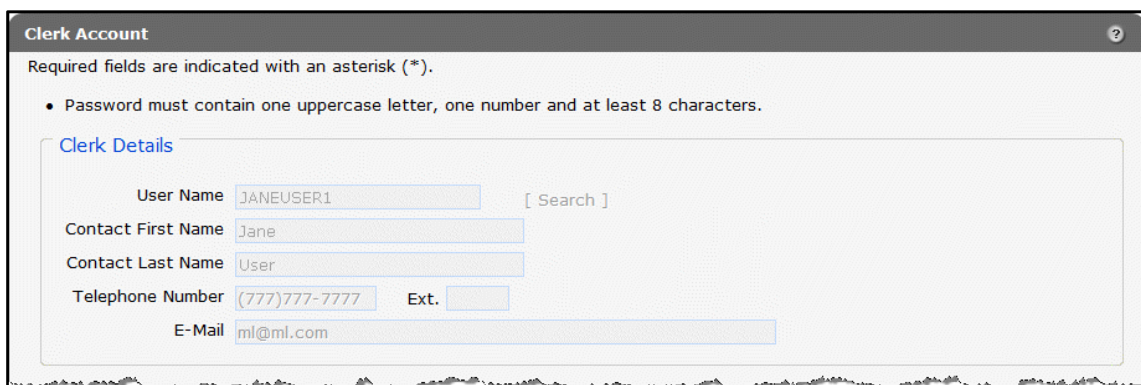
**Figure 56** User Name Search Box

- Enter the clerk account’s username, first name, or last name.
- Click **Search**. The clerk’s information will be displayed in the “Clerk Details” section.

User Name	First Name	Last Name
SHAWN99	Shawn	Smith

**Figure 57** Search Results Section

- Click the row of the applicable clerk account. The User Name Search box will close and the clerk account information will be auto-populated in the “Clerk Details” section of the Clerk Account panel.



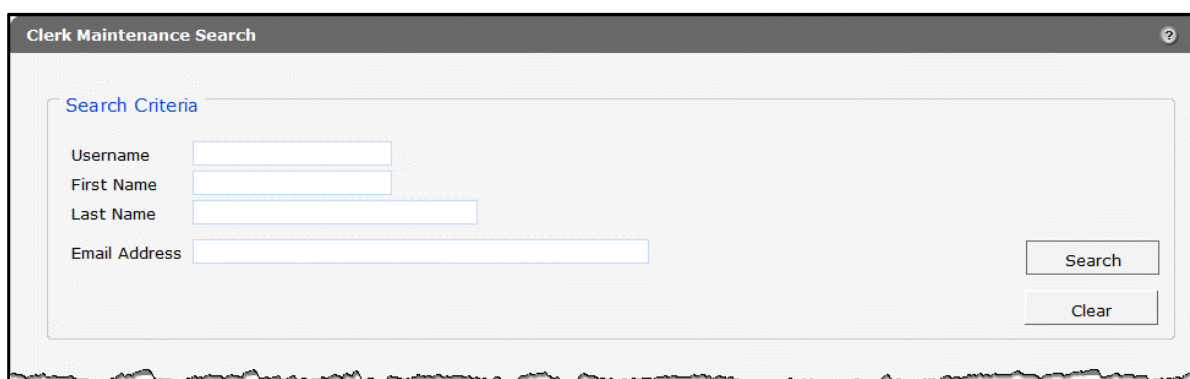
**Figure 58** Clerk Account Information Auto-Populated on Clerk Account Panel

2. Proceed to the one of the following sections once clerk details have been entered or populated:
  - Step 2 of [Section 6.3 Add a Role to a Clerk](#) of this guide
  - Step 1 of [Section 6.5 Assign a Clerk Administrator](#) of this guide

## 6.2 Search for a Clerk

The Clerk Maintenance Search panel allows a user to select an existing clerk within the provider organization.

1. Enter information for the clerk in any combination in the Search Criteria section. Alternatively, leave the fields blank to bring up a list of all clerks associated with the provider organization.



**Figure 59** Search Criteria Section

2. Click **Search**.



- Click the row containing the clerk’s name in the “Search Results” section.

Username	First Name	Last Name	Last Login Date	Email Address
PROVIDERIM	IM	Provider	05/12/2016	ml@ml.com
CLERK123	Craig	Clerk	04/27/2010	ml@ml.com
SAMPLEJQ	Jen	Sample	0	samplejq@email.com
TESTERMA	mary	tester	08/12/2008	marytester@claims.com

**Figure 60** Search Results Section

The clerk’s information will populate in the “Selected Clerk” section.

**Search Results**

Username	First Name	Last Name	Last Login Date	Email Address
PROVIDERIM	IM	Provider	05/12/2016	ml@ml.com
CLERK123	Craig	Clerk	04/27/2010	ml@ml.com
SAMPLEJQ	Jen	Sample	0	samplejq@email.com
TESTERMA	mary	tester	08/12/2008	marytester@claims.com

**Selected Clerk**

Username: PROVIDERIM

Contact First Name: IM

Contact Last Name: Provider

Telephone Number: (999)999-9999 Ext.

E-Mail: ml@ml.com

Remove Clerk    Reset Password

Next    Add Clerk    Cancel

**Figure 61** Search Results and Selected Clerk Sections

- Proceed to one of the following sections of this guide once a clerk has been selected:
  - [Section 6.3 Add a Role to a Clerk](#)
  - [Section 6.4 Remove a Role From a Clerk](#)
  - [Section 6.5 Assign a Clerk Administrator](#)
  - [Section 6.6 Reset a Clerk’s Password](#)
  - [Section 6.7 Delete a Clerk Account](#)

## 6.3 Add a Role to a Clerk

The Clerk Roles function allows a user to add roles to new or existing clerks.

1. Click **Next**. The Clerk Account panel will be displayed.

**Clerk Account** ?

Required fields are indicated with an asterisk (\*).

- Password must contain one uppercase letter, one number and at least 8 characters.

**Clerk Details**

User Name  [ Search ]

Contact First Name

Contact Last Name

Telephone Number  Ext.

E-Mail

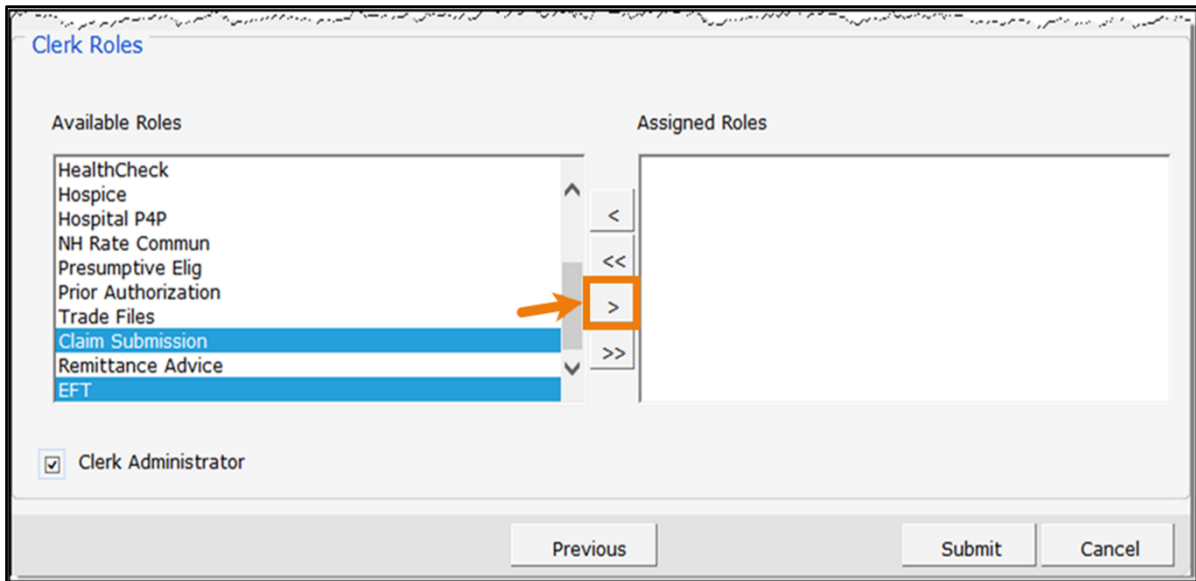
**Clerk Roles**

Available Roles	Assigned Roles
<ul style="list-style-type: none"> <li>835 Designation</li> <li>Claim Submission</li> <li>Claims - View Only</li> <li>Demographic Maint</li> <li>EFT</li> <li>EHR Incentive</li> <li>Express Enrollment</li> <li>HealthCheck</li> <li>Hospice</li> <li>Hospital P4P</li> </ul>	

Clerk Administrator

**Figure 62** Clerk Account Panel

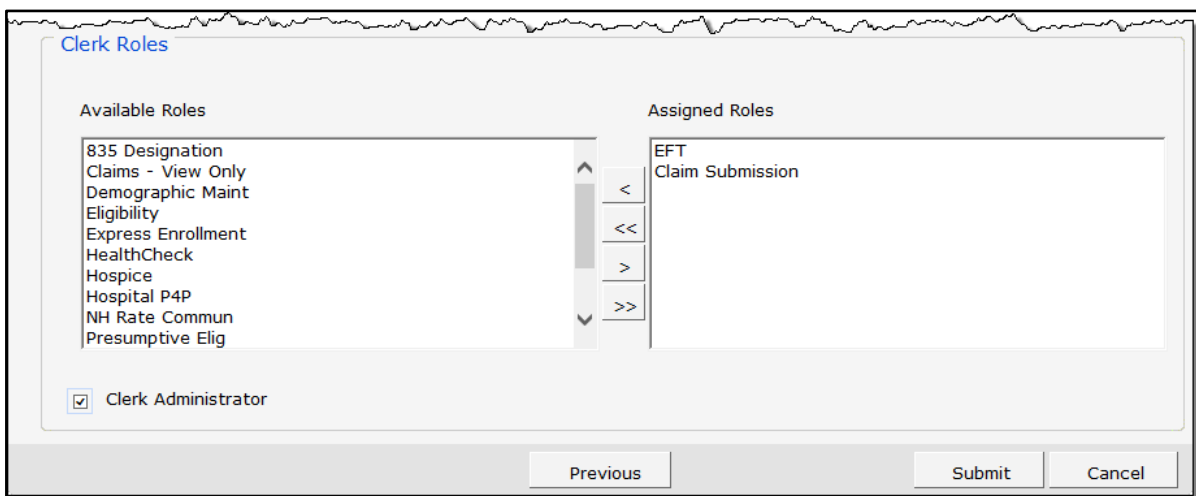
- In the “Clerk Roles” section, select a role from the Available Roles box. To select more than one row, hold down the Ctrl key and click all applicable roles.



**Figure 63** Clerk Roles Section With Available Roles

- Click >. The selected role(s) will be added to the Assigned Roles box.

Note: To add all available roles to the clerk, click >>.



**Figure 64** Clerk Roles Section With Assigned Roles

- Click **Submit**. A confirmation message will be displayed at the top of the page.



**Figure 65** User Successfully Updated Message

If an error message is received, correct the error(s) and click **Submit** again.

## 6.4 Remove a Role From a Clerk

1. Click **Next**. The Clerk Account panel will be displayed.

**Clerk Account**
?

Required fields are indicated with an asterisk (\*).

- Password must contain one uppercase letter, one number and at least 8 characters.

**Clerk Details**

User Name  [ Search ]

Contact First Name

Contact Last Name

Telephone Number  Ext.

E-Mail

**Clerk Roles**

Available Roles		Assigned Roles
835 Designation Claims - View Only Demographic Maint EHR Incentive Express Enrollment HealthCheck Hospice Hospital P4P NH Rate Commun Presumptive Elig	^ < << > >> v	EFT Claim Submission

Clerk Administrator

Previous
Submit
Cancel

**Figure 66** Clerk Account Panel

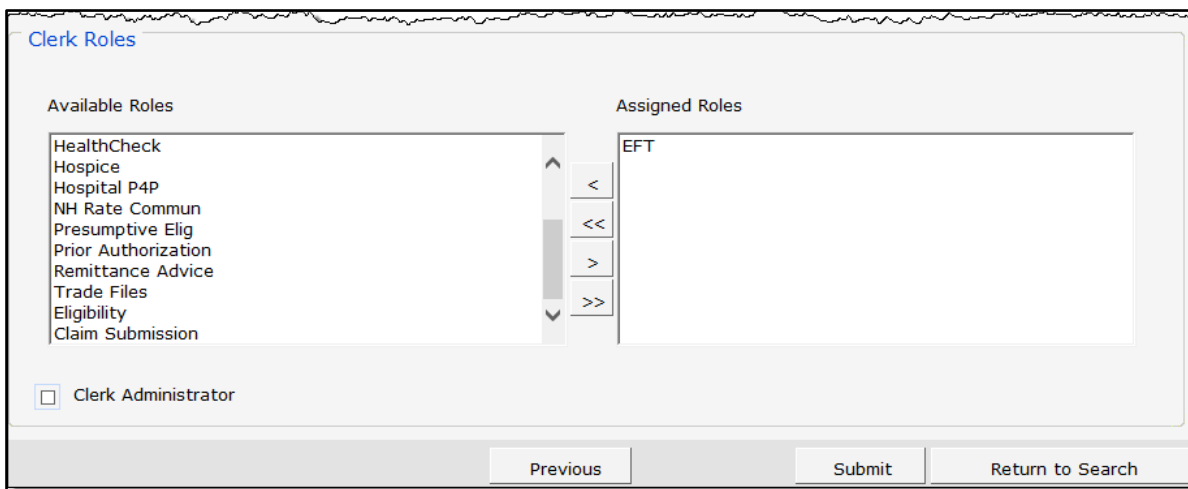
- In the “Clerk Roles” section, select a role(s) from the Assigned Roles box. To select more than one row, hold down the Ctrl key and click all applicable roles.



**Figure 67** Clerk Roles Section With Assigned Roles

- Click <. The selected role(s) will be transferred to the Available Roles box.

Note: To remove all of a clerk’s assigned roles, click <<.



**Figure 68** Clerk Roles Section With Role Removed

- Click **Submit**. A confirmation message will be displayed at the top of the page.



**Figure 69** Confirmation Message

If an error message is received, correct the error(s) and click **Submit** again.

## 6.5 Assign a Clerk Administrator

The Clerk Administrator checkbox allows a user to assign a clerk administrative rights. A clerk with administrative rights can create accounts for clerks and manage the roles assigned to them.

1. Click **Next**. The Clerk Account panel will be displayed.

**Clerk Account**
?

Required fields are indicated with an asterisk (\*).

- Password must contain one uppercase letter, one number and at least 8 characters.

**Clerk Details**

User Name  [ Search ]

Contact First Name

Contact Last Name

Telephone Number  Ext.

E-Mail

**Clerk Roles**

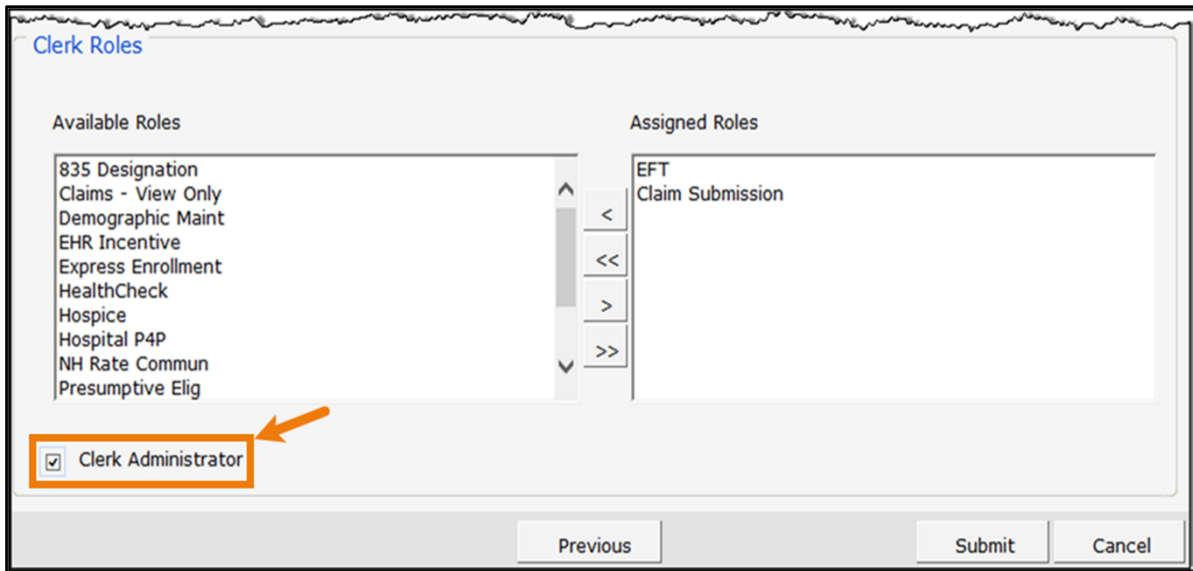
Available Roles		Assigned Roles
835 Designation Claims - View Only Demographic Maint EHR Incentive Express Enrollment HealthCheck Hospice Hospital P4P NH Rate Commun Presumptive Elig	^ < << > >> v	EFT Claim Submission

Clerk Administrator

Previous
Submit
Cancel

**Figure 70** Clerk Account Panel

- In the “Clerk Roles” section, check the Clerk Administrator box.



**Figure 71** Clerk Roles Section With Clerk Administrator Checked

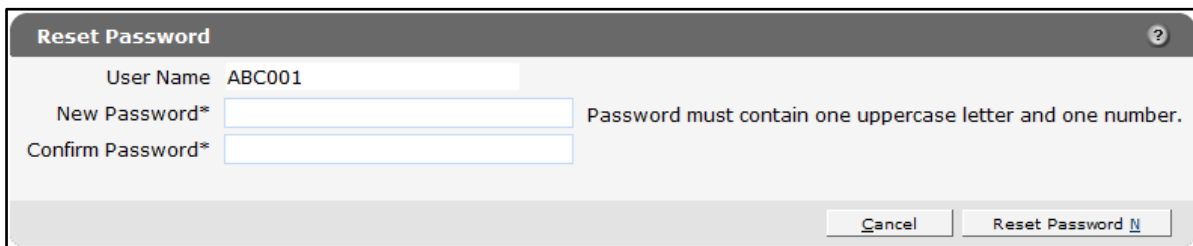
- Click **Submit**. A confirmation message will be displayed at the top of the page.



**Figure 72** Confirmation Message

## 6.6 Reset a Clerk’s Password

- On the Clerk Maintenance Search panel, click **Reset Password**. The Reset Password page will be displayed.



**Figure 73** Reset Password Page

- Enter the new password (twice for confirmation). The password must be between nine–15 characters and must contain three different types of characters such as uppercase letters, lowercase letters, special characters, or numbers. The password must be unique and cannot contain information from the user name, contact first name, or contact last name.

- Click **Reset Password**. A confirmation message will be displayed at the top of the page.

**The following messages were generated:**  
Password successfully reset. Click cancel button to return to Clerk Maintenance.

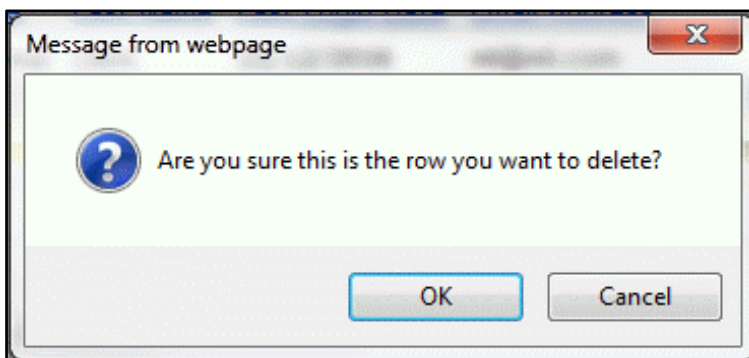
**Figure 74** Confirmation Message

Note: Clerks must change the password set up by the administrative account the first time they log in.

If an error message is received, correct the error(s) and click **Reset Password** again.

## 6.7 Delete a Clerk Account

- On the Clerk Maintenance Search panel, click **Remove Clerk** to initiate the record deletion. A dialog box confirming the deletion will be displayed.



**Figure 75** Dialog Box

- Click **OK**. A confirmation message will be displayed at the top of the Clerk Maintenance Search page.

**The following messages were generated:**  
The user's access has been removed for this provider.

**Figure 76** Confirmation Message

## 6.8 Clerk Account Log in for First Time

Clerk account users will be required to complete the steps for multi-factor authentication (MFA) when logging in for the first time and every 60 days thereafter.

With MFA, users are asked to provide two authentication methods to verify their identity when logging in to the Portal. MFA will protect Portal accounts against unauthorized access in case user login credentials are compromised.

MFA will be required to log in when a user changes any of the following account information:

- Account password
- Email address



When using MFA, a user will be sent a one-time code through their choice of email, text message (SMS), or phone call.

1. Access the Portal at <https://www.forwardhealth.wi.gov/>.

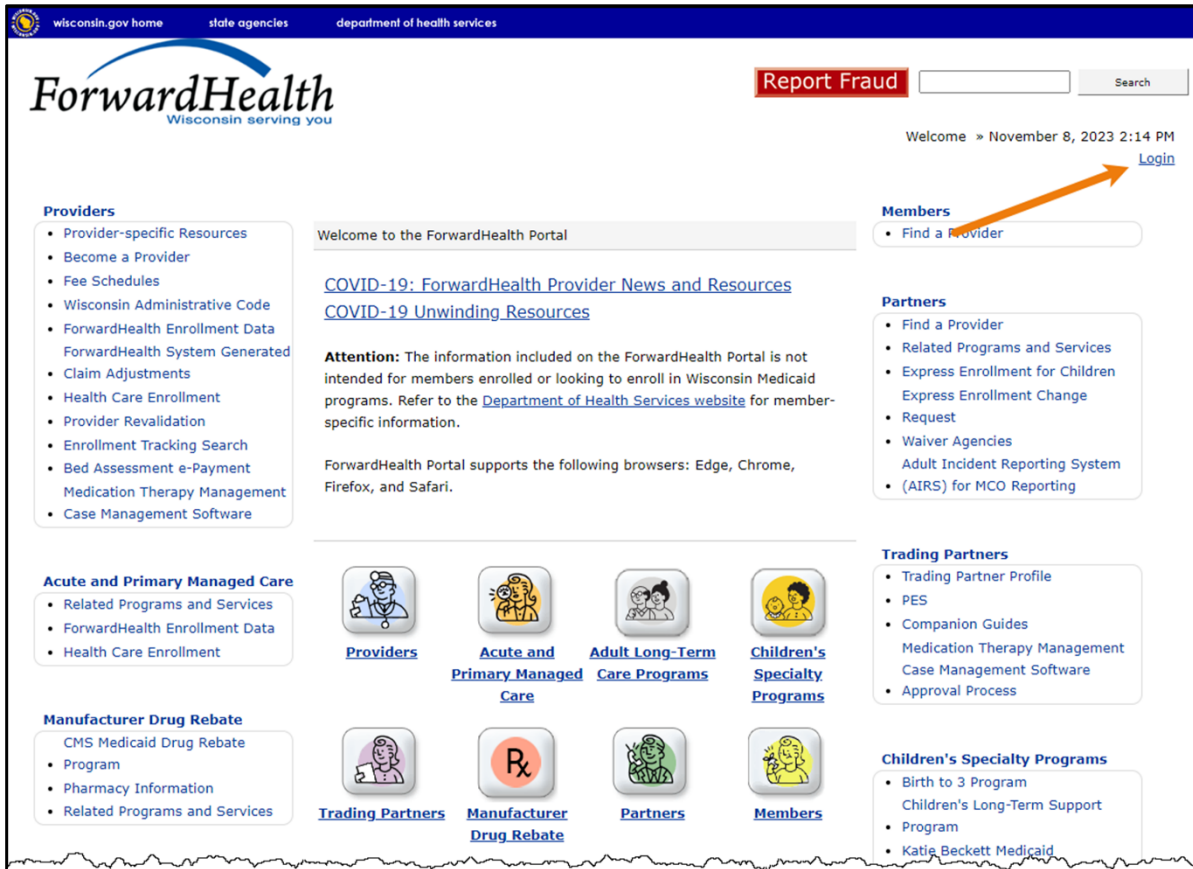
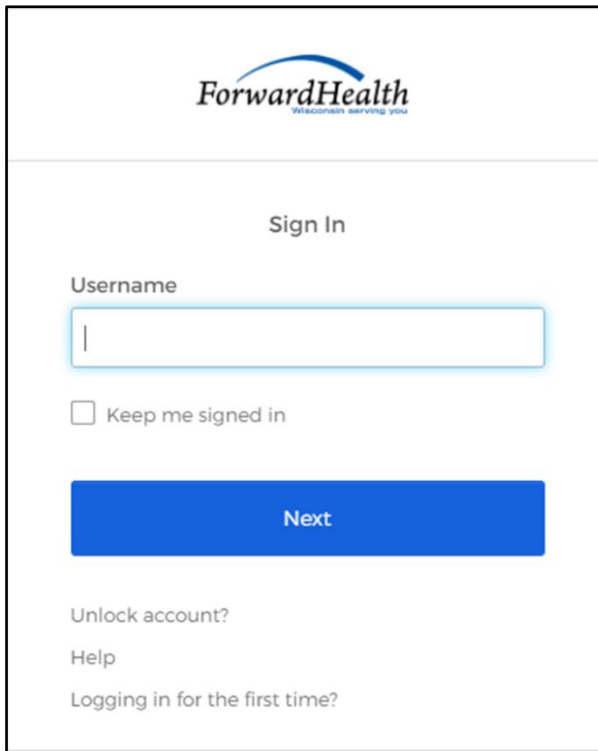


Figure 77 ForwardHealth Portal Page

2. Click **Login**. A Sign In box will be displayed.



ForwardHealth  
WISCONSIN serving you

Sign In

Username

Keep me signed in

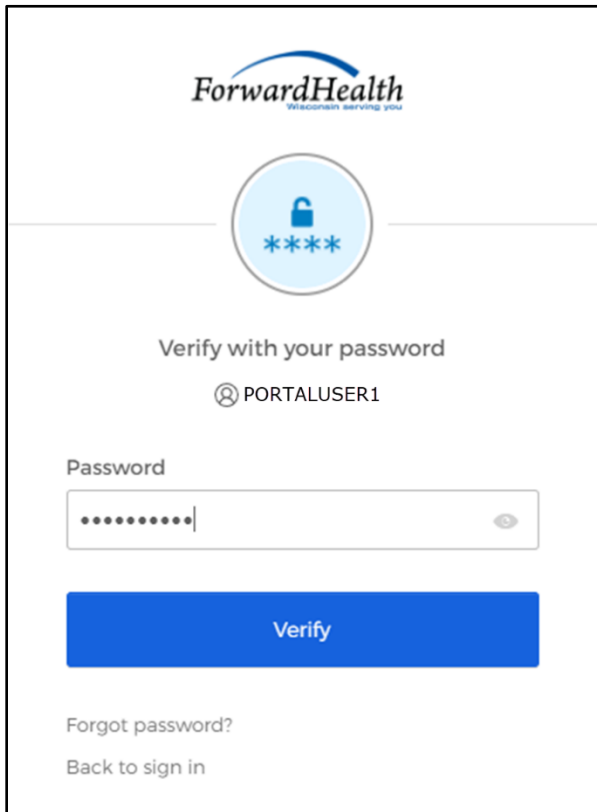
Next

Unlock account?  
Help  
Logging in for the first time?

**Figure 78** Sign In Box

3. Enter the user's username.
4. Click **Next**.

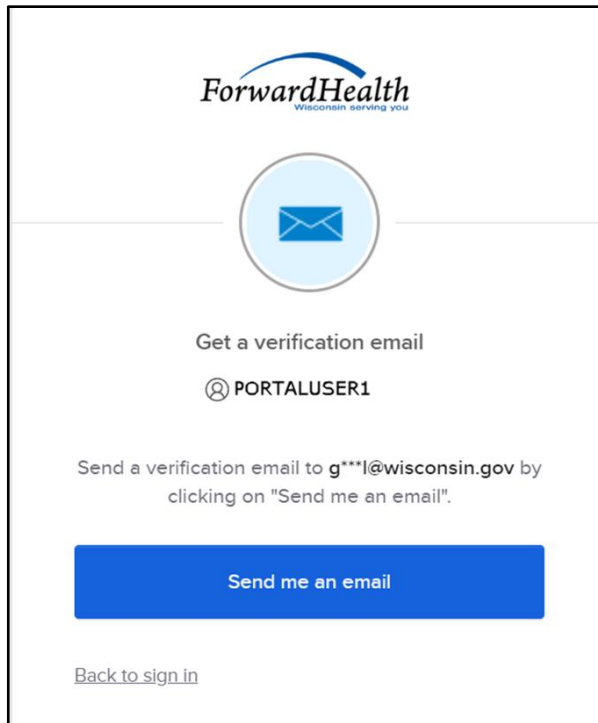
A Verify with your password box will be displayed.



**Figure 79** Verify With Your Password Box

5. Enter the user's password.
6. Click **Verify**.

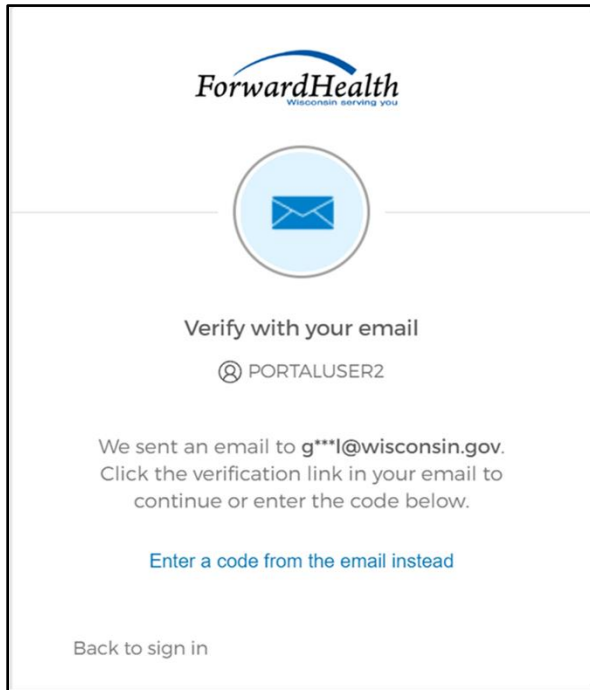
A Get a verification email box will be displayed. Note: If the user's password expires when setting up MFA, a change password box will be displayed, and the user will be prompted to enter and re-enter their new password.



**Figure 80** Get a Verification Email Box

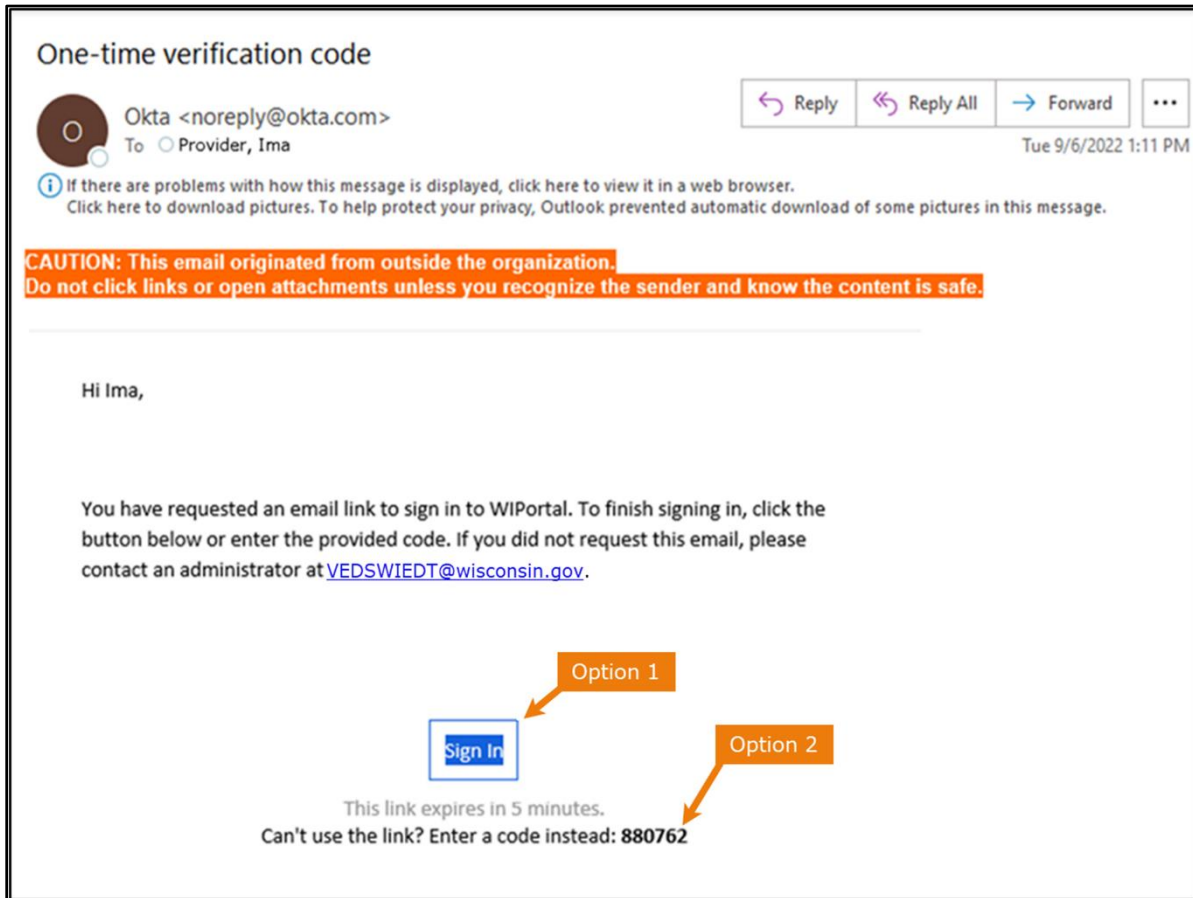
7. Click **Send me an email**.

A box will be displayed indicating the email has been sent with a link to enter the code from the email.



**Figure 81** Verify With Your Email Box

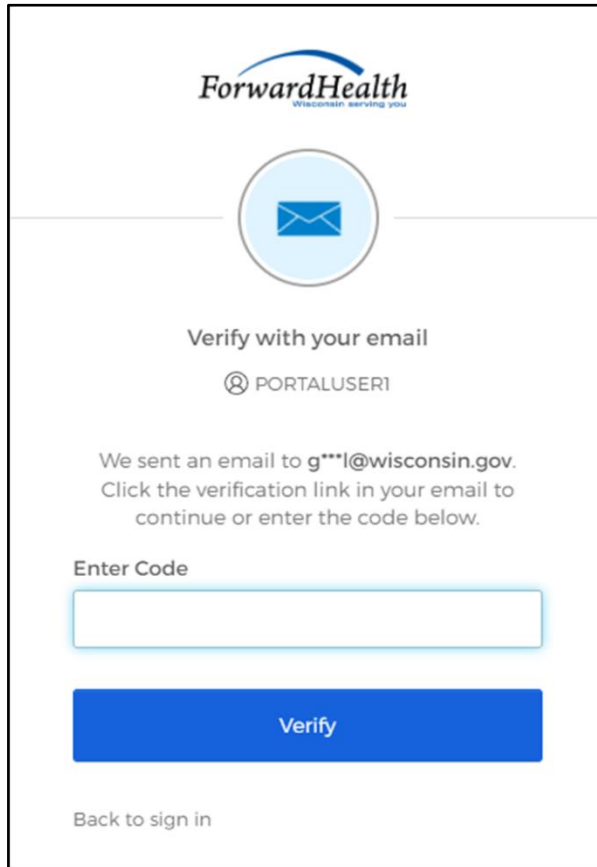
- 8. The email sent to the user's email address includes a **Sign In** link (Option 1) and a verification code (Option 2).



**Figure 82** One-Time Verification Code Email

9. The user can choose to either:

- Click the **Sign In** link (Option 1) from the email.
- Copy the verification code in the email (Option 2), return to the Verify with your email box, and click **Enter a verification code instead**. Enter the code from the email and click **Verify**.



**ForwardHealth**  
Wisconsin serving you

Verify with your email

PORTALUSER1

We sent an email to g\*\*\*l@wisconsin.gov.  
Click the verification link in your email to  
continue or enter the code below.

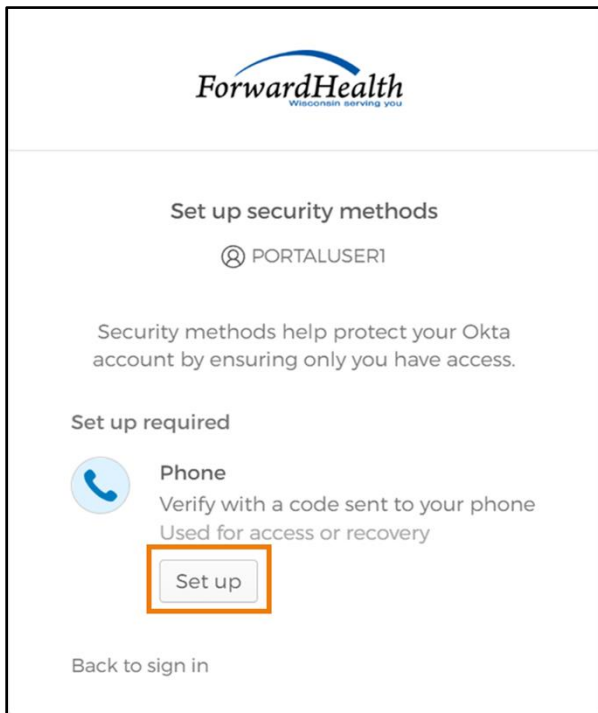
Enter Code

Verify

[Back to sign in](#)

**Figure 83** Verify With Your Email Box

A Set up security methods box will be displayed.

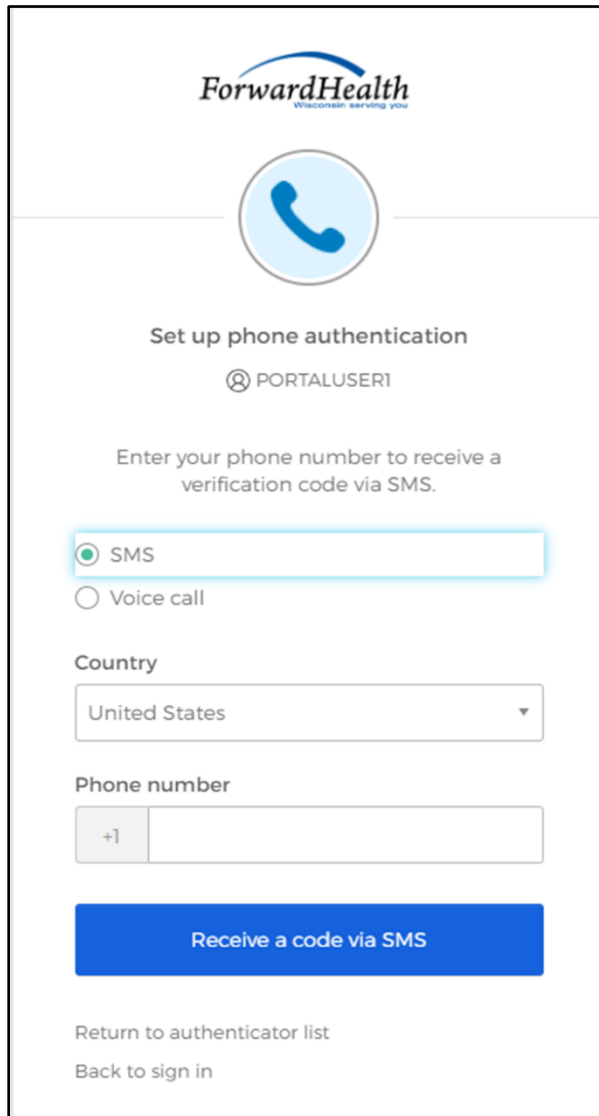


**Figure 84** Set Up Security Methods Box

10. Click **Set up**.



A Set up phone authentication box will be displayed.

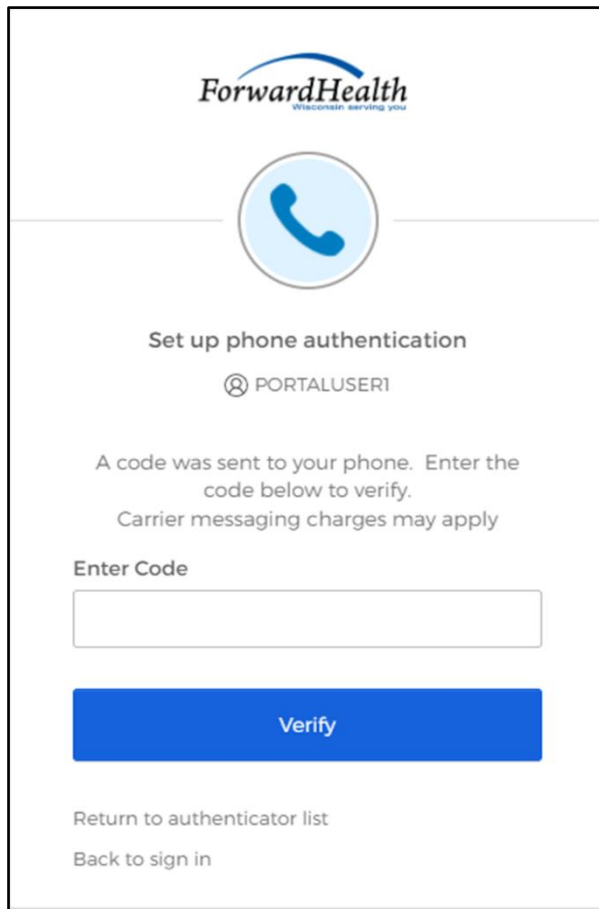


The screenshot shows a web form for setting up phone authentication. At the top is the ForwardHealth logo with the tagline 'Wisconsin, serving you'. Below the logo is a blue telephone handset icon inside a circle. The main heading is 'Set up phone authentication' followed by the user ID 'PORTALUSER1'. The instruction reads: 'Enter your phone number to receive a verification code via SMS.' There are two radio button options: 'SMS' (which is selected) and 'Voice call'. Below these is a 'Country' dropdown menu currently set to 'United States'. Underneath is a 'Phone number' field with a '+1' country code selector on the left. A prominent blue button labeled 'Receive a code via SMS' is positioned below the phone number field. At the bottom of the form are two links: 'Return to authenticator list' and 'Back to sign in'.


**Figure 85** Set Up Phone Authentication Box

11. Select **SMS** (text) or **Voice call** for the phone authentication method.
12. Enter the phone number.
13. Click **Receive a code via SMS** or **Receive a code via voice call** depending on which option is selected.

A Set up phone authentication box will be displayed.



**ForwardHealth**  
Wisconsin serving you



**Set up phone authentication**  
PORTALUSER1

A code was sent to your phone. Enter the code below to verify.  
Carrier messaging charges may apply

Enter Code

**Verify**

[Return to authenticator list](#)  
[Back to sign in](#)

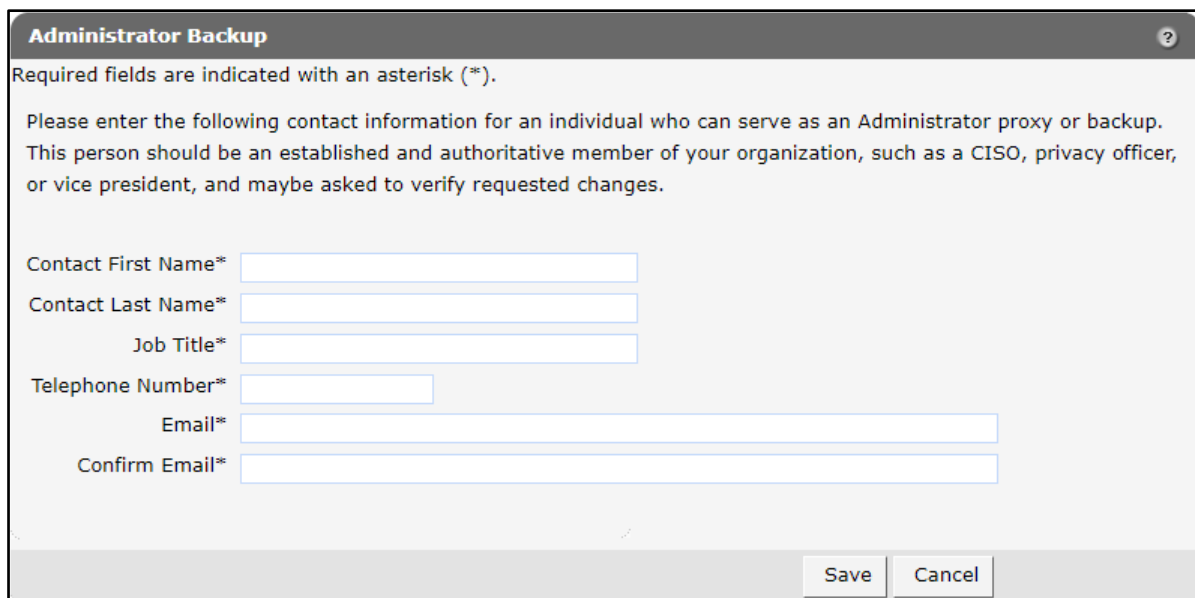
**Figure 86** Set Up Phone Authentication Box

14. Enter the code that was sent via text or voice call in the **Enter Code** box.
15. Click **Verify**. MFA will be set up and the user will be signed in to the Portal.

# 7 Administrator Backup Information

Provider administrators are required to set up a backup contact for their Portal accounts via the Administrator Backup panel.

1. On the Account page, click **Administrator Backup Information**. The Administrator Backup panel will be displayed.



**Administrator Backup** ?

Required fields are indicated with an asterisk (\*).

Please enter the following contact information for an individual who can serve as an Administrator proxy or backup. This person should be an established and authoritative member of your organization, such as a CISO, privacy officer, or vice president, and maybe asked to verify requested changes.

Contact First Name\*

Contact Last Name\*

Job Title\*

Telephone Number\*

Email\*

Confirm Email\*

Save Cancel

**Figure 87** Administrator Backup Panel

2. Enter information for the backup contact in the fields. It is necessary to **complete all the fields** on this page.

Note: The administrator backup email addresses cannot match those of the current administrator. Also, the phone number must include the area code. The number will be auto-formatted.

3. Click Save. A confirmation message will be displayed at the top of the page.



**The following messages were generated:**

Save was Successful

**Figure 88** Confirmation Message

## 8 Clerk Last Logon

This function allows users with administrative accounts to search, identify, and remove inactive clerk accounts.

On the Account page, click **Clerk Last Logon**. The Clerk Last Logon panel will be displayed.

**Clerk Last Logon**

**Search Criteria**

Number of Days since Logon\*  60 Days  90 Days  120 Days

First Name

Last Name

User Name

Search Cancel

**List of clerks**

\*\*\* No rows found \*\*\*

Remove selected Clerks Cancel

**Figure 89** Clerk Maintenance Search Panel

Through the Clerk Last Logon panel, users with administrative accounts can search for users with inactive accounts and can also identify and remove clerks from a list of their organization's clerk accounts.

Note: Users with clerk administrative accounts may not administer their own accounts or other administrative or clerk administrative accounts.

### 8.1 Search and Remove a Clerk Account

The Clerk Last Logon panel allows a user to select an existing clerk within the provider organization based on the number of days since their last logon.

1. In the Search Criteria section, click the button indicating the number of days since the clerk's last logon. Options include periods of at least 60 days, 90 days, or 120 days from the clerk's last logon.

2. Enter any information for the clerk in any combination in the Search Criteria section. Alternatively, leave the First Name, Last Name, and User Name fields blank to bring up a list of all clerks associated with the provider organization based on the number of days since their last logon.

**Clerk Last Logon**

**Search Criteria**

Number of Days since Logon\*  60 Days  90 Days  120 Days

First Name

Last Name

User Name

Search Cancel

**Figure 90** Search Criteria Section

3. Click **Search**. The clerk(s) will be listed under the “List of clerks” section.

**Clerk Last Logon**

**Search Criteria**

Number of Days since Logon\*  60 Days  90 Days  120 Days

First Name

Last Name

User Name

Search Cancel

**List of clerks**

<a href="#">Clerk First Name</a>	<a href="#">Clerk Last Name</a>	<a href="#">Clerk User Name</a>	<a href="#">E-Mail</a>	<a href="#">Date Last Logon</a>	<a href="#">Number of days since last logon</a>	<a href="#">Remove From Org</a>
mary	tester	SUPERCLAIM	marytester@claims.com	20080812	4608	<input type="checkbox"/>
test	teststst	DEREKTEST9	ml@ml.com	20100427	3985	<input type="checkbox"/>

Remove selected Clerks Cancel

**Figure 91** List of Clerks Section

4. Check the box under the Remove From Org column.
5. Click **Remove selected Clerks**. The selected clerks will be removed from the Portal.

Note: The user can click **Cancel** to return to their secure account page.

## 9 Add Organization

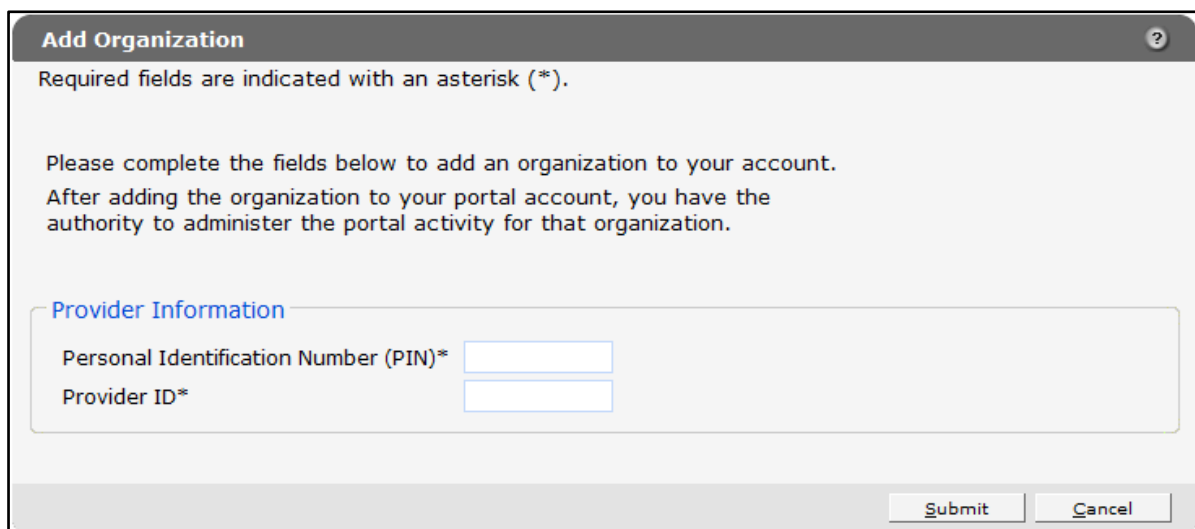
The Add Organization function allows users with an administrative account to add multiple organizations to an existing Portal account. This feature offers the convenience of managing multiple organizations within one Provider Portal account as an alternative to creating separate Provider Portal accounts for each organization.

After adding an organization to an account, users with an administrative account are authorized to perform all tasks as defined by the roles available for that organization.

In addition, account users granted the necessary permissions may move from one organization to another through the Switch Organization function without having to log out of the account.

To add an organization to an account:

1. Follow the steps in [Chapter 2 Request Portal Access](#) of this guide to request a PIN.
2. Once the user has received the PIN letter, access the Portal at <https://www.forwardhealth.wi.gov/>.
3. Log in to the account to which the user wishes to add the new organization. The user's secure Provider page will be displayed.
4. Click **Account** on the main menu at the top of the page. The Account Home page will be displayed.
5. Click **Add Organization**. The Add Organization page will be displayed.



**Add Organization** ?

Required fields are indicated with an asterisk (\*).

Please complete the fields below to add an organization to your account.  
After adding the organization to your portal account, you have the authority to administer the portal activity for that organization.

**Provider Information**

Personal Identification Number (PIN)\*

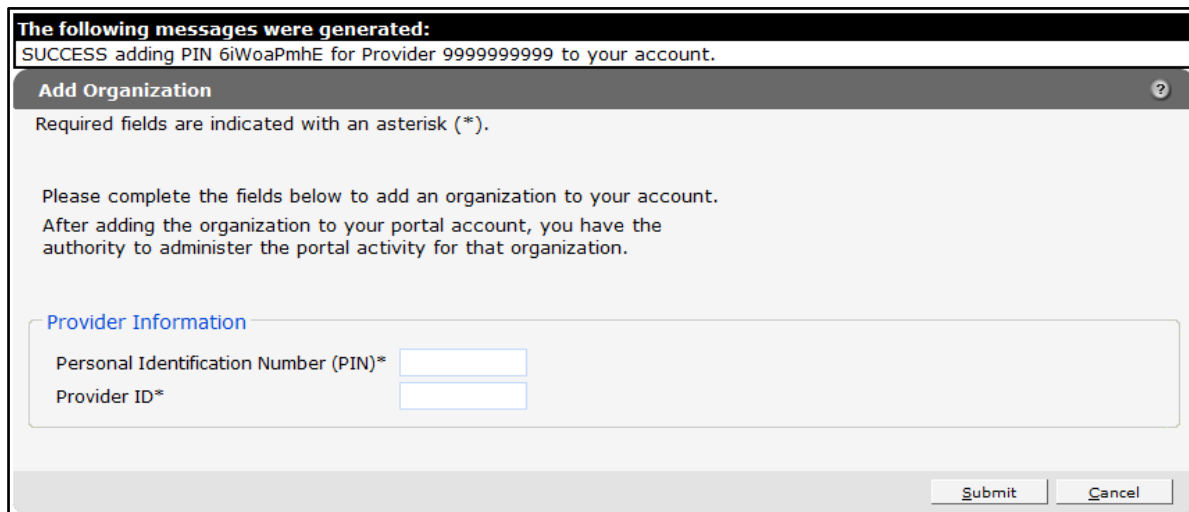
Provider ID\*

**Figure 92** Add Organization Page

6. Enter the PIN sent to the organization in the PIN letter.

Note: Each organization needs to request and receive a PIN in order to be added to an existing Portal account. After receiving a PIN, users should follow the steps for adding an organization to an existing account instead of the steps outlined in [Chapter 3 Set Up an Account](#) of this guide.

7. Enter the provider's NPI or the Medicaid Provider ID in the Provider ID field.
8. Click **Submit**. A confirmation message will be displayed at the top of the page.



**The following messages were generated:**  
SUCCESS adding PIN 6iWoaPmhE for Provider 9999999999 to your account.

**Add Organization** ?

Required fields are indicated with an asterisk (\*).

Please complete the fields below to add an organization to your account.  
After adding the organization to your portal account, you have the authority to administer the portal activity for that organization.

**Provider Information**

Personal Identification Number (PIN)\*

Provider ID\*

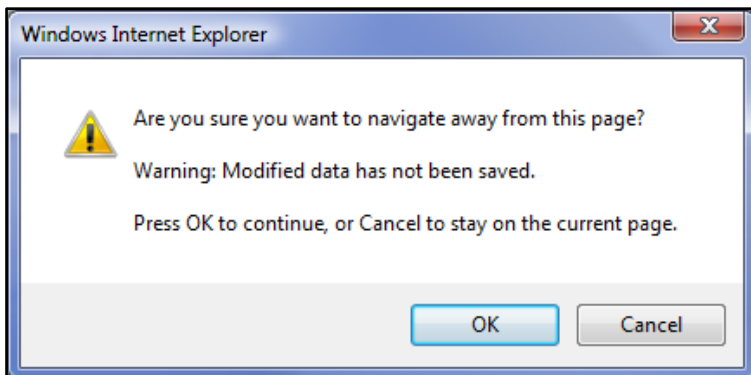
**Figure 93** Add Organization Page With Confirmation Message

If the user receives an error message, correct the error(s) and click **Submit** again.

Once the organization is added to the Portal account, the user will be able to return to the Account Home page to switch to and perform tasks for the new organization's account.

Note: If an administrative account has a new organization added to it, clerks set up under the initial organization are not automatically linked to the new organization. Clerk administrative and clerk accounts need to be added to the new organization via the Clerk Maintenance function. For more information, refer to [Section 6.1 Add a Clerk](#) of this guide.

- Click **Account** on the main menu at the top of the page to return to the Account Home page. A dialog box will be displayed.



**Figure 94** Dialog Box

- Click **OK**. The Account Home page will be displayed.
- For information about switching to the added organization, refer to [Chapter 10 Switch Organization](#) of this guide.



# 10 Switch Organization

Under the Switch Organization function:

- Users with administrative and clerk administrative accounts may assign roles to a clerk for a different organization within the same account without logging off.
- Clerks may perform tasks on behalf of multiple organizations within the same account without logging off.
- Users may change their default login organization.

## 10.1 Search and Switch to Organization

1. On the Account Home page, click Switch Organization. The switch organization page will be displayed.

The screenshot displays the 'Switch Organization' page. At the top, it shows the user's current login information: 'You are logged in with NPI: 3152063400, Taxonomy Number: 261QC0050X, Zip Code: 53711 - 1200, Financial Payer: Medicaid, Type Of Business: Not for Profit, IRS Tax-Exempt: No, Public/Private: Private'. A search bar is present in the top right. The main content area is titled 'Select Account' and includes a note: 'Required fields are indicated with an asterisk (\*)'. The 'Search Criteria' section contains input fields for NPI, Name, Provider ID, City, and ZIP Code, along with a 'search' button. Below this, the 'Search Results' section shows '\*\*\* No rows found \*\*\*'. The 'Currently Selected Provider' section has a 'Current Provider' field. The 'Newly Selected Provider' section includes fields for NPI, Name, Address, City, State, Provider ID, Payer, Taxonomy, and Provider Type. At the bottom right, there are 'Switch To' and 'Set As Default' buttons. An orange arrow points to the 'Switch Organization' link in the top navigation bar.

**Figure 95** Switch Organization Page

The NPI or Provider ID that the user is currently logged in under will be displayed at the top of the page.

2. Enter any of the following search criteria for the organization in any combination in the “Search Criteria” section.
  - NPI
  - Provider ID
  - ZIP Code
  - Name
  - City
3. Click **search**. The organization(s) will be listed under the “Search Results” section.

**Select Account**

Required fields are indicated with an asterisk (\*).

**Search Criteria**

NPI  Name

Provider ID  City

ZIP Code

**Search Results**

NPI	Provider ID	Name	Address	City	State	ZIP	ZIP + 4	Taxonomy	Payer	Provider Type	Security Level
1234567890	000000000	ALS AMBULANCE SERVICE	8964 FAKE BLVD.	MILWAUKEE	WI	53202 5555	0000L0000X	Medicaid	Ambulance	Provider	
0987654321	100000000	BLS AMBULANCE SERVICE	4561 NOT REAL AVE	MILWAUKEE	WI	53210 4444	1111L1111X	Medicaid	Ambulance	Provider	
0101010101	1111111111	HERE FOR U	1234 FINDURWAY DR	MILWAUKEE	WI	53226 3333	2222L2222X	Medicaid	Therapy Group	Provider	

Select row above to update.

**Currently Selected Provider**

Current Provider

**Newly Selected Provider**

NPI  Provider ID

Name  Payer

Address  Taxonomy

City  Provider Type

State  -

**Figure 96** Switch Organization Page—Search Results

- Click on the row containing the applicable organization. The organization’s information will auto-populate in the “Currently Selected Provider” and “Newly Selected Provider” sections. Note: If only one organization is listed under the “Search Results” section the “Newly Selected Provider” section will auto-populate with the organization’s information.

**Select Account**  
Required fields are indicated with an asterisk (\*).

**Search Criteria**

NPI  Name   
 Provider ID  City   
 ZIP Code

**Search Results**

NPI	Provider ID	Name	Address	City	State	ZIP	ZIP + 4	Taxonomy	Payer	Provider Type	Security Level
1234567890	000000000	ALS AMBULANCE SERVICE	8964 FAKE BLVD.	MILWAUKEE	WI	53202	5555	0000L0000X	Medicaid	Ambulance	Provider
0987654321	100000000	BLS AMBULANCE SERVICE	4561 NOT REAL AVE	MILWAUKEE	WI	53210	4444	1111L1111X	Medicaid	Ambulance	Provider
0101010101	111111111	HERE FOR U	1234 FINDURWAY DR	MILWAUKEE	WI	53226	3333	3333L3333X	Medicaid	Therapy Group	Provider

Select row above to update.

**Currently Selected Provider**

Current Provider

**Newly Selected Provider**

NPI  Provider ID   
 Name  Payer   
 Address  Taxonomy   
 City  Provider Type   
 State   -

**Figure 97** Switch Organization Page–Search Results Populated

- If the user wishes to switch to the selected organization’s account, click **Switch To**.
- The user will be returned to the secure Provider page. The NPI to which they switched will be displayed at the top of the page.

You are logged in with NPI: 3333333333, Taxonomy Number: 2222L2222X, Zip Code: 53226 - 3333, Financial Payer: Medicaid, Type Of Business: County Agency, IRS Tax-Exempt: No, Public/Private: Private

**Figure 98** Log In Information

## 10.2 Set As Default Login Organization

1. To make an organization the default login user, on the Switch Organization page, click the row of the desired organization. The organization’s information will auto-populate in the “Currently Selected Provider” and “Newly Selected Provider” sections.

**Switch Organization**
?

Required fields are indicated with an asterisk (\*).

NPI	Provider ID	Address	City	State	ZIP	ZIP + 4	Taxonomy	Provider Type	Payer	Default Provider ID
1396713967	38003800	1 SHARP RD	WATERFORD	WI	53185		200000000X	Physician Group	Medicaid	<input checked="" type="checkbox"/>
1609816098	24002400	24 PLINE RD	MADISON	WI	53719		200R00000X	Physician	Medicaid	<input type="checkbox"/>

Select row above to update.

**Currently Selected Provider**

Current Provider: 1609816098

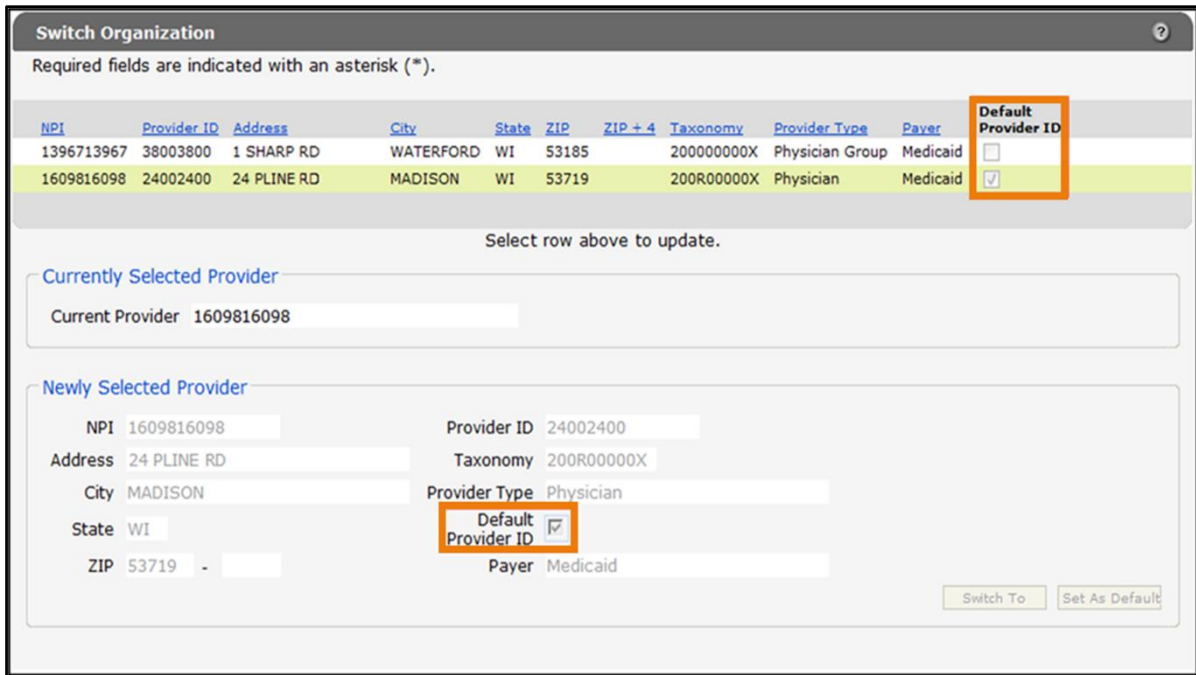
**Newly Selected Provider**

NPI	1609816098	Provider ID	24002400
Address	24 PLINE RD	Taxonomy	200R00000X
City	MADISON	Provider Type	Physician
State	WI	Default Provider ID	<input type="checkbox"/>
ZIP	53719 -	Payer	Medicaid

Switch To **Set As Default**

**Figure 99** Switch Organization Page With Auto-Populated Information

2. Click **Set As Default**. The Switch Organization page will refresh and check marks will be displayed in the Default Provider ID boxes for the selected organization.



**Figure 100** Switch Organization Page

The selected organization will automatically be the user each time they log in to their account.

# 11 Messages

The Messages page acts as a one-way message center for providers to receive electronic notifications and provider publications from ForwardHealth. The most recent messages are also displayed on the user’s secure Provider page.

Messages are sent to the user’s account by ForwardHealth and are available from the date sent to the expiration date. A message is removed from the Messages page if the user manually removes it or if it is automatically removed on the expiration date set by ForwardHealth.

1. On the Account Home page, click **Messages**. The Messages page will be displayed.

Note: If there is only one message, the message and “Message” section will be displayed.

Messages					
Category	Subject	Message	Date Sent	Expiration Date	Remove
Notification	Test 2	Claims submitted to ForwardHealth for services identified by unlisted (NOC) proc	10/06/2010	10/06/2011	<input type="checkbox"/>
Alert	This is for test cas	This is the message for testing test case 44614 to verify changes made to secure	10/22/2010	10/22/2011	<input type="checkbox"/>
Introduction	Testing more web mes	This is for test case 44845	12/29/2010	12/29/2011	<input type="checkbox"/>
Alert	Another web message	Testing web user name send to option	12/29/2010	12/29/2011	<input type="checkbox"/>
Alert	ForwardHealth Electr	You are receiving this message because you are listed as the Electronic Funds Tr	08/04/2011	09/03/2011	<input type="checkbox"/>
Alert	ForwardHealth Electr	You are receiving this message because you are listed as the Electronic Funds Tr	08/10/2011	09/09/2011	<input type="checkbox"/>
Alert	ForwardHealth Electr	You are receiving this message because you are listed as the Electronic Funds Tr	08/10/2011	09/09/2011	<input type="checkbox"/>

Figure 101 Messages Page

2. Click the applicable message. The “Message” section will be displayed at the bottom of the page.

Alert	ForwardHealth Electr	Electronic Funds Tr You are receiving this message because you are listed as the Electronic Funds Tr	08/10/2011	09/09/2011	<input type="checkbox"/>
<a href="#">Remove</a>					

**Message** ?

Category

Subject

You are receiving this message because you are listed as the Electronic Funds Transfer (EFT) contact and/or the Portal Administrator for the following ForwardHealth Provider:

Provider ID/NPI: 1234567890  
 Taxonomy Number: 100RC0000X(if applicable)  
 Zip Code: 53703  
 Financial Payer: TXIX

This message is to inform you that key EFT Account information has been changed for this Provider's EFT. EFT Account information may include:

- Financial Institution information
- Account number
- Account type
- Account holder name

To view the specific changes made to your provider's EFT Account information, please log on to your secure ForwardHealth Portal Account and review the EFT History for this provider. The EFT History will describe the change(s) that were made and where they originated.

Some EFT Account information may be changed as a result of information received directly from the bank/financial institution. You should already have been made aware of these changes by your bank; however, if you have not been made aware of bank-authorized changes, please contact your bank/financial institution to verify any change(s) made.

Some EFT Account information may be changed by Portal Administrators or Authorized Portal Users (Authorized PortalUsers are portal users who have been granted access to the "EFT role" by the Portal Administrator). Portal Administrators can control access to all EFT information by granting/restricting access to the "EFT role" on the Portal. If you believe the EFT Account information was incorrectly changed by a Portal user, please work with your Portal Administrator to correct the information and rectify any inappropriate access by users.

If you have any questions regarding this message, please contact Provider Services at (800) 947-9627.

Sincerely,  
ForwardHealth

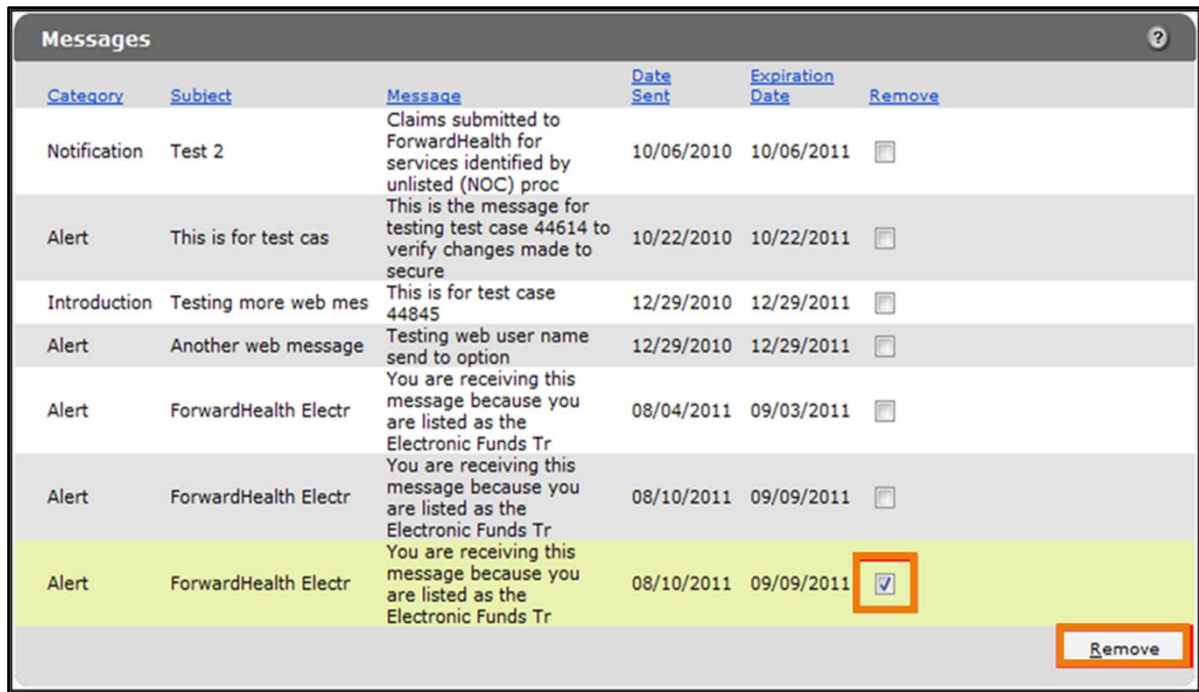
Date Sent

Expiration Date

Figure 102 Message Section

To delete a message:

1. Check the Remove box next to the message.



The screenshot shows a 'Messages' window with a table of messages. The table has columns for Category, Subject, Message, Date Sent, Expiration Date, and Remove. The last row is highlighted in yellow, and its 'Remove' checkbox is checked and highlighted with a red box. A 'Remove' button is also highlighted with a red box at the bottom right of the window.

Category	Subject	Message	Date Sent	Expiration Date	Remove
Notification	Test 2	Claims submitted to ForwardHealth for services identified by unlisted (NOC) proc	10/06/2010	10/06/2011	<input type="checkbox"/>
Alert	This is for test cas	This is the message for testing test case 44614 to verify changes made to secure	10/22/2010	10/22/2011	<input type="checkbox"/>
Introduction	Testing more web mes	This is for test case 44845	12/29/2010	12/29/2011	<input type="checkbox"/>
Alert	Another web message	Testing web user name send to option	12/29/2010	12/29/2011	<input type="checkbox"/>
Alert	ForwardHealth Electr	You are receiving this message because you are listed as the Electronic Funds Tr	08/04/2011	09/03/2011	<input type="checkbox"/>
Alert	ForwardHealth Electr	You are receiving this message because you are listed as the Electronic Funds Tr	08/10/2011	09/09/2011	<input type="checkbox"/>
Alert	ForwardHealth Electr	You are receiving this message because you are listed as the Electronic Funds Tr	08/10/2011	09/09/2011	<input checked="" type="checkbox"/>

Figure 103 Messages Page

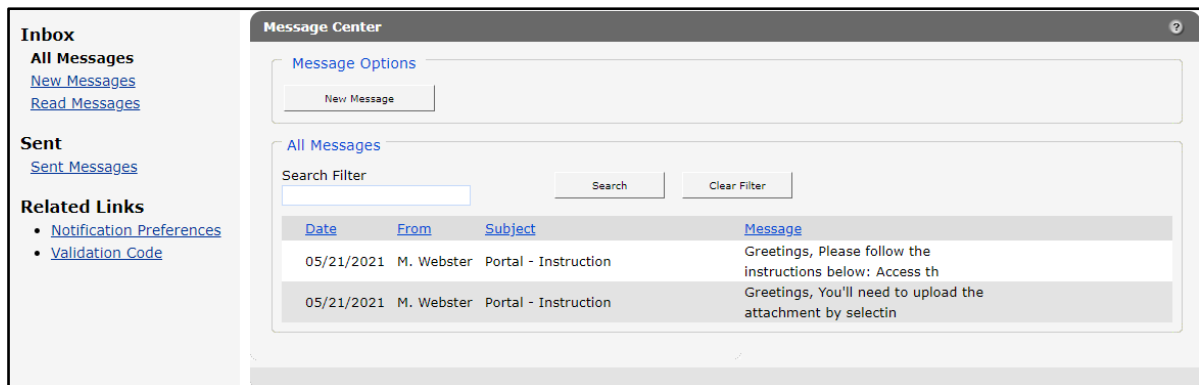
2. Click **Remove**. The message will be deleted from the Messages page.



# 12 Message Center

The message center function allows users to have a dialogue with Wisconsin Department of Health Services staff without leaving the Portal. Messages can be exchanged on a variety of topics along with the ability to attach documentation that needs to be included in the conversation.

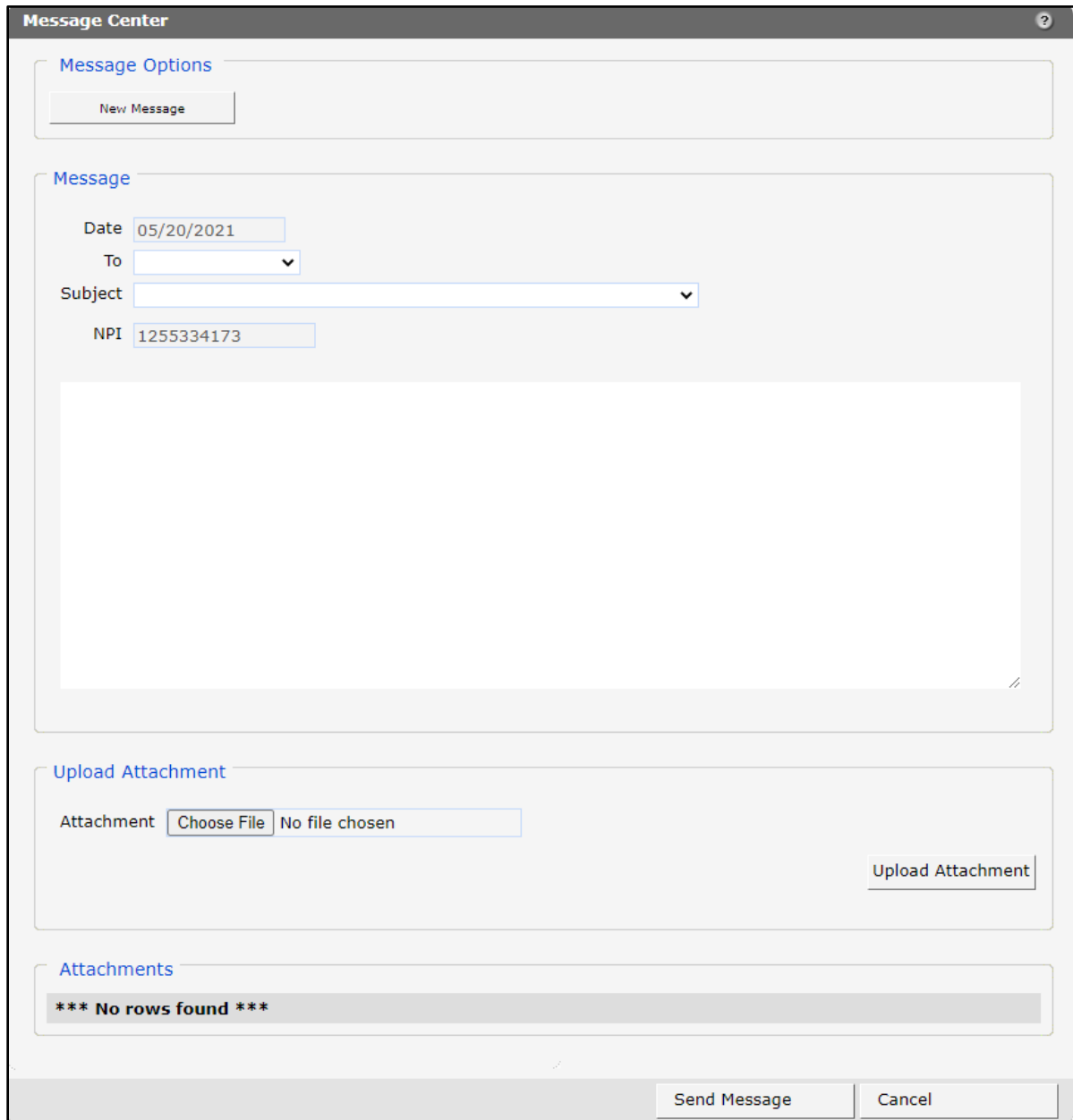
1. On the secure Portal page, click **Message Center**. The Message Center panel will be displayed. Each view includes the same functionality (for example, read, reply, print) described below.



**Figure 104** Message Center Panel

## 12.1 Send a New Message

1. Click **New Message**. The “Message,” “Upload Attachment,” and “Attachments” sections will be displayed on the Message Center panel.



The screenshot shows the Message Center interface with the following sections:

- Message Options:** Contains a button labeled "New Message".
- Message:** Contains input fields for "Date" (05/20/2021), "To" (a drop-down menu), "Subject" (a drop-down menu), and "NPI" (1255334173). Below these fields is a large text area for the message body.
- Upload Attachment:** Contains an "Attachment" field with a "Choose File" button and the text "No file chosen". To the right is an "Upload Attachment" button.
- Attachments:** A table area displaying the message "\*\*\* No rows found \*\*\*".
- Bottom:** Two buttons: "Send Message" and "Cancel".

**Figure 105** Message Center Panel for New Message

2. Select the message recipient from the drop-down menu in the *To* field.  
Note: The options in the drop-down menu will differ based on the user’s security role.
3. Select a message subject from the drop-down menu.

4. Enter a message in the free text space. Messages are limited to 4,000 characters.
5. Click **Choose File** under the “Upload Attachment” section to upload an attachment for the message.
6. Select the desired file and double-click. The file name will appear after the **Choose File** box.
7. Click **Upload Attachment**. A confirmation message will be displayed at the top of the page and the file name will appear under the “Attachments” section.



**Figure 106** File Upload Confirmation Message

The following file extensions may be uploaded: .jpg, .png, .csv, .pdf, .jpeg, and .xlsx.

8. Click **Send Message**. A confirmation message will be displayed at the top of the page.



**Figure 107** Message Sent Confirmation Message

## 12.2 Read a Message

1. Click the row of the desired message at the bottom of the All Messages, New Messages, Read Messages, or Sent Messages views. The Message Center panel will be displayed with message details and options.

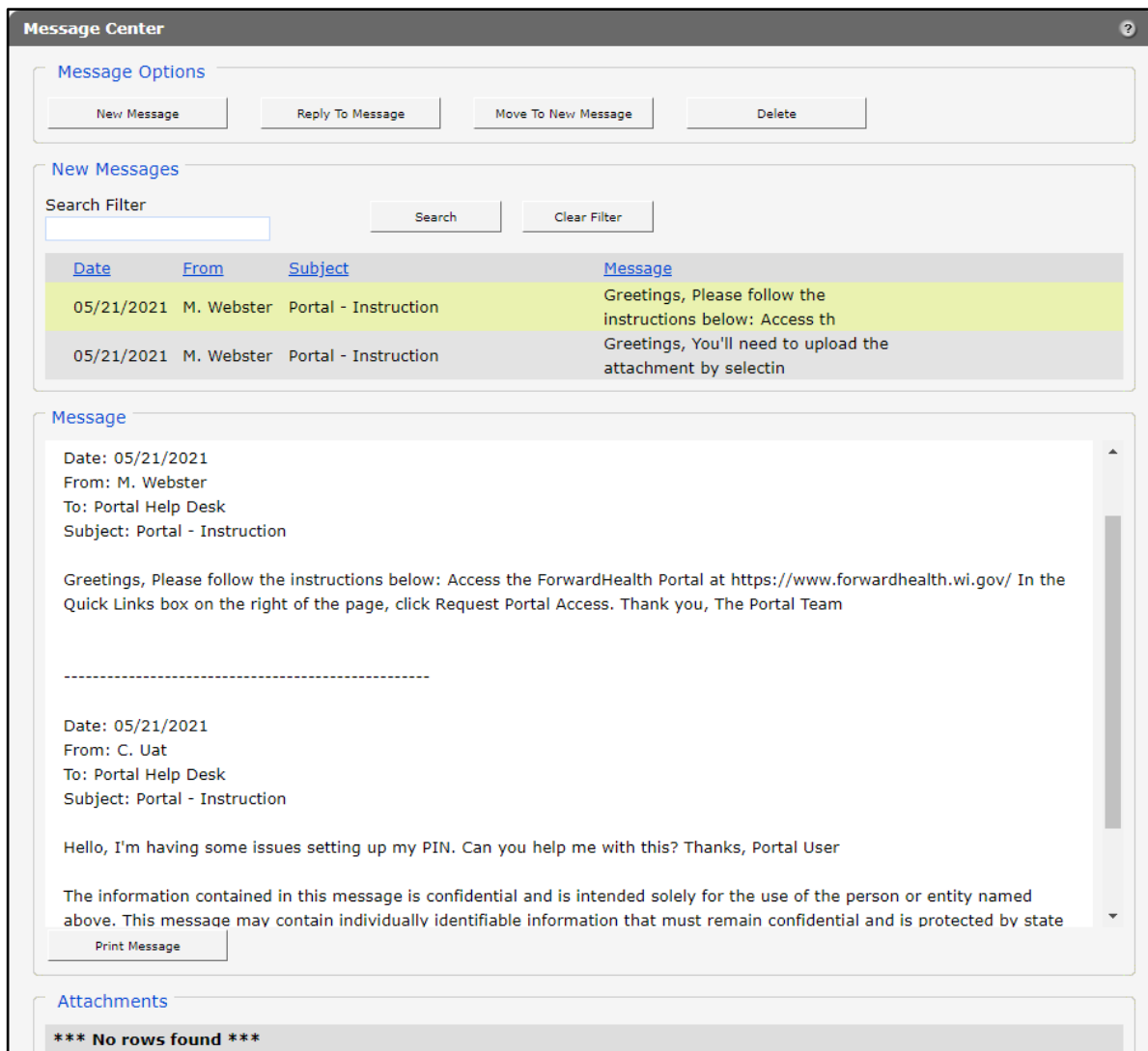


Figure 108 Message Center Panel for Reading Messages

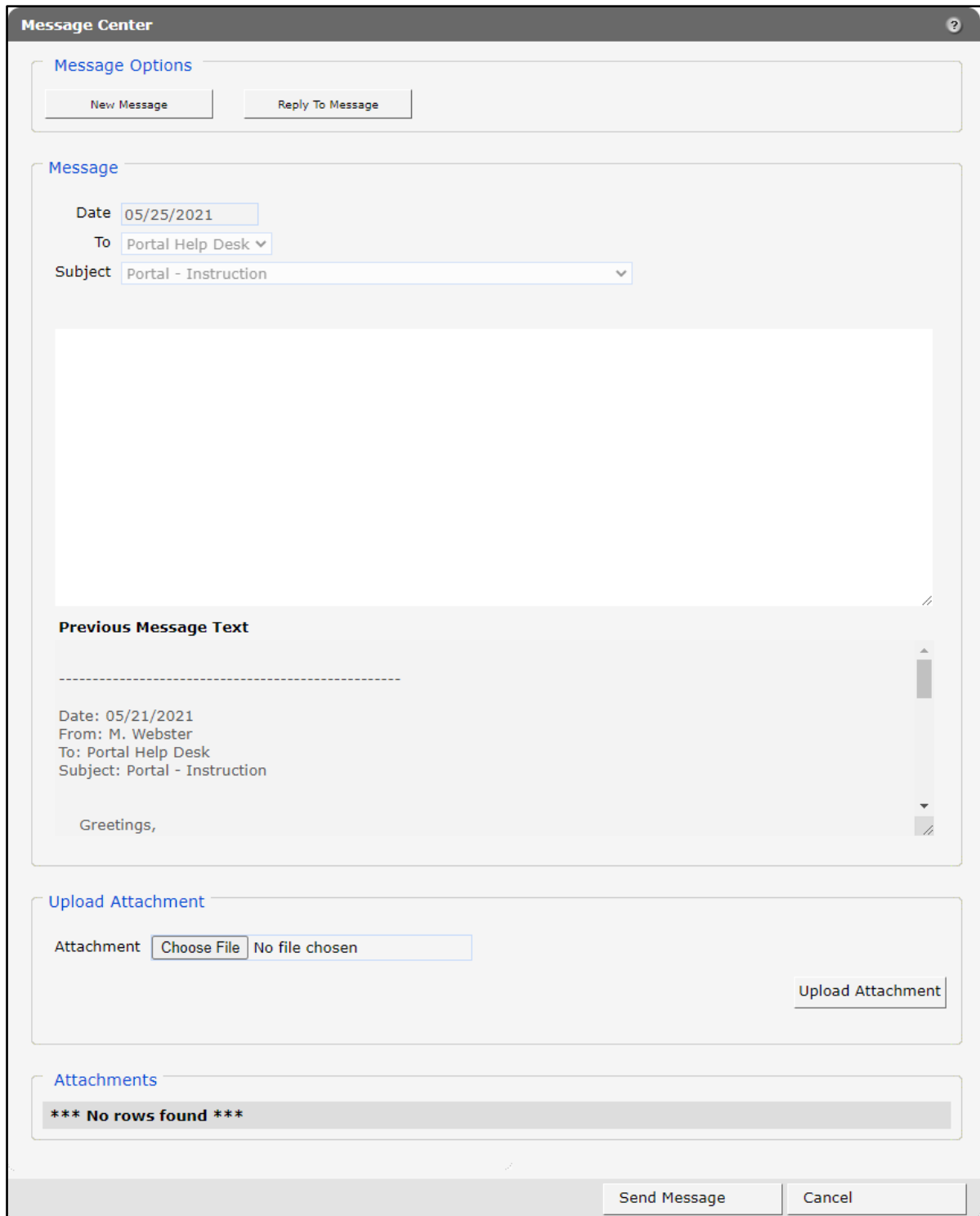
2. If desired, click Print Message to open a printable view of the message. Select the print icon at the bottom of the page to choose the appropriate printer and properties.
3. The user can choose to move messages from the “All Messages” or “Read Messages” sections to the “New Messages” section by clicking **Move to New Message**. A confirmation message will be displayed at the top of the page.



Figure 109 Message Moved Confirmation Message

## 12.2.1 Respond to an Open Message

1. Click **Reply to Message** to respond to an inbox message. A message reply panel will be displayed.



The screenshot shows the "Message Center" interface. At the top, there are two buttons: "New Message" and "Reply To Message". Below this is the "Message" section, which includes fields for "Date" (05/25/2021), "To" (Portal Help Desk), and "Subject" (Portal - Instruction). A large text area is provided for composing the reply. Below the text area is a section titled "Previous Message Text" which displays the header of a previous message: "Date: 05/21/2021", "From: M. Webster", "To: Portal Help Desk", and "Subject: Portal - Instruction". The body of the previous message starts with "Greetings,". Below this is the "Upload Attachment" section, featuring a "Choose File" button, a "No file chosen" status, and an "Upload Attachment" button. At the bottom, there is an "Attachments" section showing "\*\*\* No rows found \*\*\*". The interface concludes with "Send Message" and "Cancel" buttons.

**Figure 110** Message Center Panel for Replying to Messages

2. Enter the message text in the free text space. Messages are limited to 4,000 characters.
3. Click **Choose File** under the “Upload Attachment” section to upload an attachment for the message.
4. Select the desired file and double-click. The file name will appear after the **Choose File** box.
5. Click **Upload Attachment**. A confirmation message will be displayed at the top of the page and the file name will appear under the Attachments section.



**Figure 111** File Upload Confirmation Message

The following file extensions are allowed for uploading: .jpg, .png, .csv, .pdf, .jpeg, and .xlsx.

6. Click **Send Message**. A confirmation message will be displayed at the top of the page.

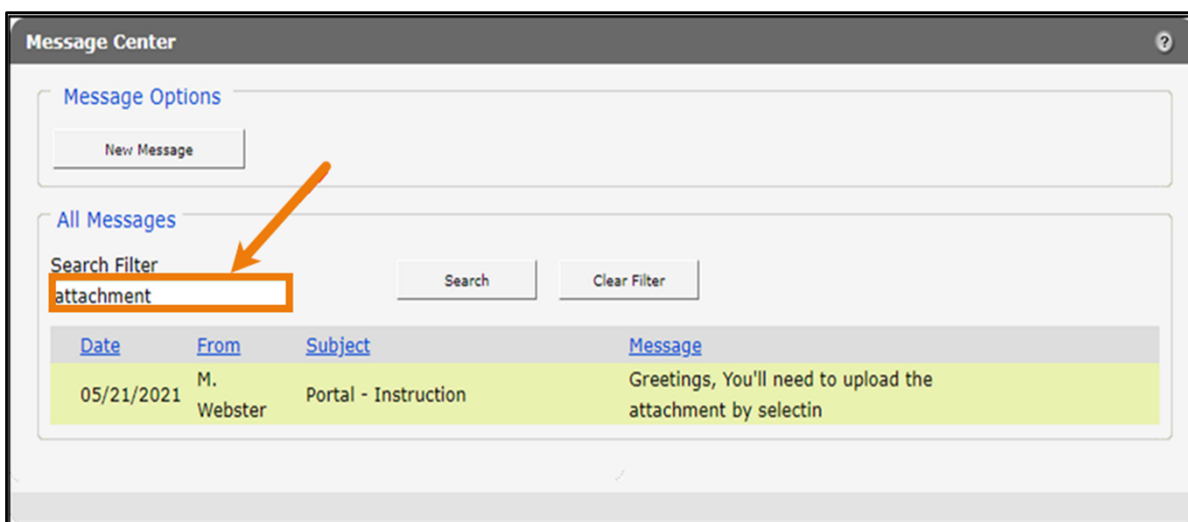


**Figure 112** Message Sent Confirmation Message

## 12.3 Search for a Message

1. Enter a keyword in the Search Filter field on the All Messages, New Messages, Read Messages, or Sent Messages views.
2. Click **Search**. Messages containing the keyword will be displayed.

If the desired message is not found, click **Clear Filter**, enter a new keyword, and click **Search**.



**Figure 113** Message Center Search Filter

3. Click the row in the search results to open the message.

## 12.4 Notification Preferences and Validation Code

Users can sign up to receive notifications of Portal messages through email, text, or both. After signing up, a verification email will be sent to the user to register their device.

1. On the Message Center page, click **Notification Preferences** under Related Links. The Notifications Preferences panel will be displayed. The “Notification Preferences,” “Register Email,” “Register Mobile Number,” and “Mobile Notifications – Terms and Conditions” sections will be displayed on the Notification Preferences panel.

The screenshot shows a web interface titled "Notification Preferences" with a help icon in the top right corner. The interface is divided into three main sections:

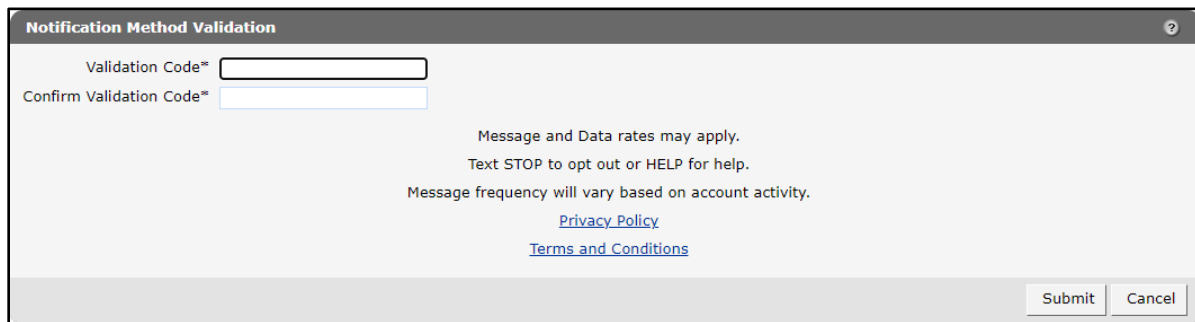
- Notification Preferences:** Contains a dropdown menu for "Active Method(s)" currently set to "Neither".
- Register Email:** Includes a text field for "Email on File" (value: None), a text field for "Last Validated" (value: 05/21/2020), a "Resend Validation Code" button, and two text input fields for "New Email" and "Confirm New Email".
- Register Mobile Number:** Includes a text field for "Number on File" (value: None), a text field for "Last Validated" (value: 05/21/2020), a "Resend Validation Code" button, and two text input fields for "New Mobile Number" and "Confirm Mobile Number".
- Mobile Notifications - Terms and Conditions:** Contains introductory text about the service, a list of checkboxes for user agreement, and links for "Privacy Policy" and "Terms and Conditions".

At the bottom right of the panel are "Submit" and "Cancel" buttons.

**Figure 114** Notification Preferences Panel

2. Select the type of method in the *Active Method(s)* field using the drop-down menu.

3. If the user is registering to receive notifications via email, enter the user's email address in the *New Email* and *Confirm New Email* fields in the "Register Email" section.
4. If the user is registering to receive notifications via mobile phone, enter the user's mobile phone number in the *New Mobile Number* and *Confirm Mobile Number* fields in the "Register Mobile Number" section.
5. Check the appropriate agreement boxes to receive notifications via mobile phone.
6. Click **Submit**. A Notification Method Validation panel will be displayed, and a validation code will be sent to the email and/or mobile number that has been registered.



**Notification Method Validation**

Validation Code\*

Confirm Validation Code\*

Message and Data rates may apply.  
Text STOP to opt out or HELP for help.  
Message frequency will vary based on account activity.

[Privacy Policy](#)  
[Terms and Conditions](#)

Submit Cancel

**Figure 115** Notification Method Validation Panel

Note: The user can also access the Notification Method Validation panel by clicking **Validation Code** under Related Links.

7. Enter the validation code and click **Submit**. A confirmation message will be generated.



**The following messages were generated:**  
Your Email Address was successfully validated.

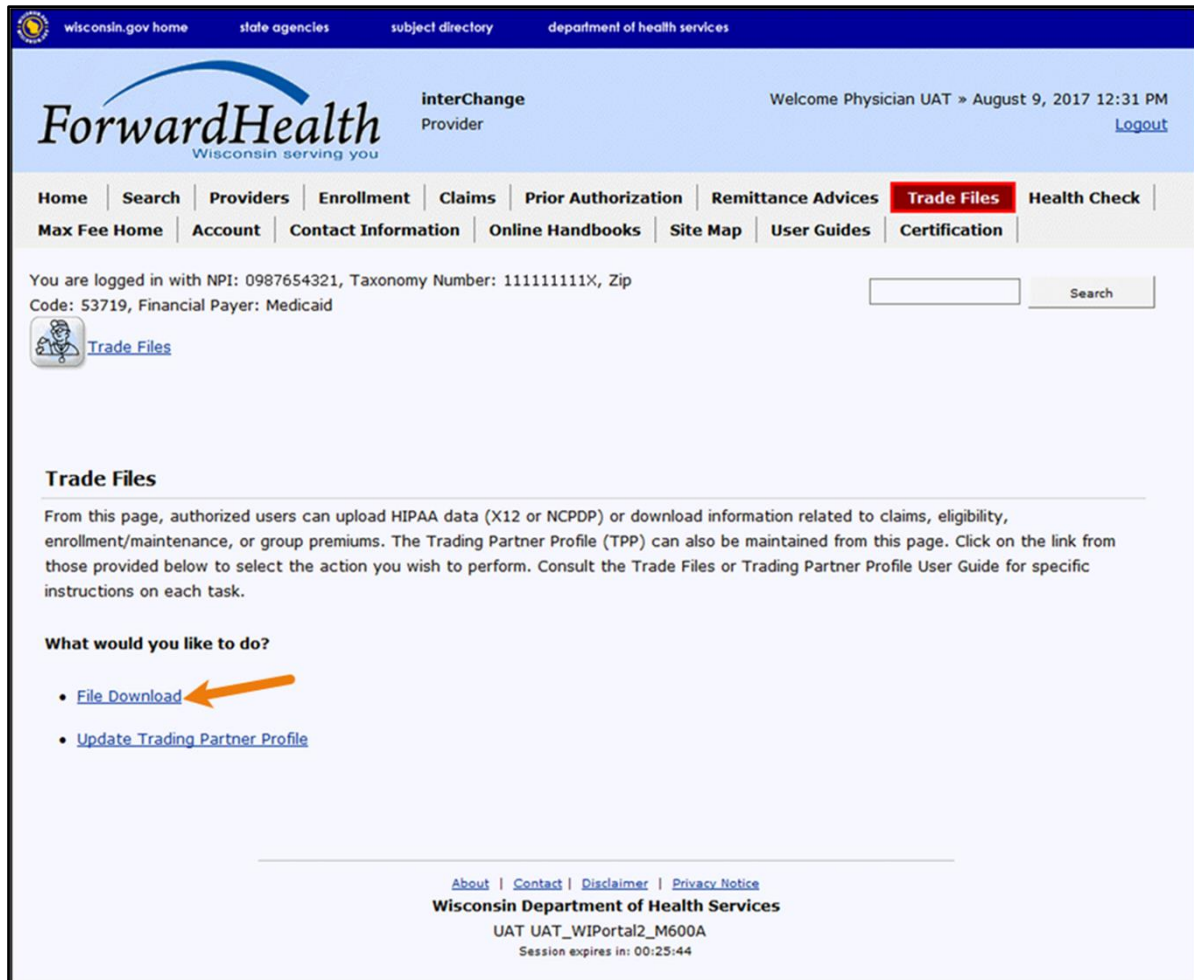
**Figure 116** Confirmation Message



# 13 Trading Files

Providers are able to download provider-specific files, such as rate information, using the Trade Files function. Documents available for download using this function are those that have been uploaded by ForwardHealth for the individual provider(s).

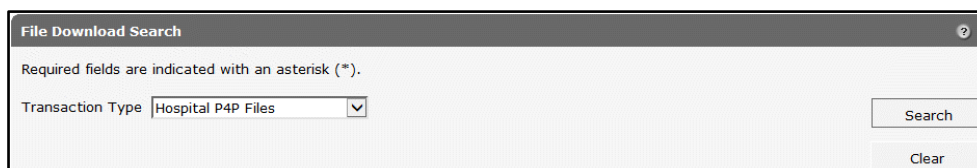
1. On the Trade Files homepage, click **File Download**.



The screenshot shows the ForwardHealth Provider Portal interface. At the top, there is a navigation bar with links for 'wisconsin.gov home', 'state agencies', 'subject directory', and 'department of health services'. The main header features the ForwardHealth logo and the text 'Wisconsin serving you'. Below the logo, there is a navigation menu with various options, including 'Trade Files' which is highlighted in red. The page content includes a login status message, a search bar, and a 'Trade Files' icon. The main section is titled 'Trade Files' and contains instructions for authorized users. A list of actions is provided, with 'File Download' highlighted by an orange arrow.

**Figure 117** Trade Files Homepage

2. Select the applicable file type from the Transaction Type drop-down menu.



The screenshot shows a 'File Download Search' panel. It has a title bar with a question mark icon. Below the title bar, there is a message: 'Required fields are indicated with an asterisk (\*).' The search bar contains the text 'Hospital P4P Files' and a dropdown arrow. There are 'Search' and 'Clear' buttons.

**Figure 118** File Download Search Panel

3. Click **Search**.
4. Click the applicable file from the list under Current Files Available for Download.

Current Files Available for Download			
File Name	Transaction Type	Date Available	Date Downloaded
0000001_00000000_0123456789_HospitalP4P.pdf	Hospital P4P Files	08/10/2017	N/A

**Figure 119** Current Files Available for Download Panel

A download dialog box will be displayed.



**Figure 120** Download Dialog Box

5. Click **Open**. The file will open and may be saved to the user's computer or network.

## 13.1 Avoiding Download Errors

If errors occur when downloading documents, try the following:

- Make certain to allow pop-ups on the Portal. In Internet Explorer:
  - a. Go to Tools > Pop-up Blocker > Pop-up Blocker Settings.
  - b. Add <https://www.forwardhealth.wi.gov/> to the *Address of website to allow*.
- Add the Portal website to the list of Trusted Sites. For Internet Explorer:
  - a. Go to Internet Options.
  - b. Click the Security tab.
  - c. Select Trusted sites.
  - d. Click Sites.
  - e. Add <https://www.forwardhealth.wi.gov/> to the list.
- Set the **Trusted Sites security level** to the Medium-low default setting. For Internet Explorer:
  - a. Go to Internet Options > Security.
  - b. Click Trusted sites.
  - c. Click Default level.
  - d. Set the Security level slider to Medium-low.

# 14 Access interChange Functionality

The interChange (iC) Functionality section of the Provider area of the Portal allows authorized users to access member information.

1. To use interChange functionality on the Portal, click **iC Functionality** on the main menu at the top of the page. The iC Functionality page will be displayed.

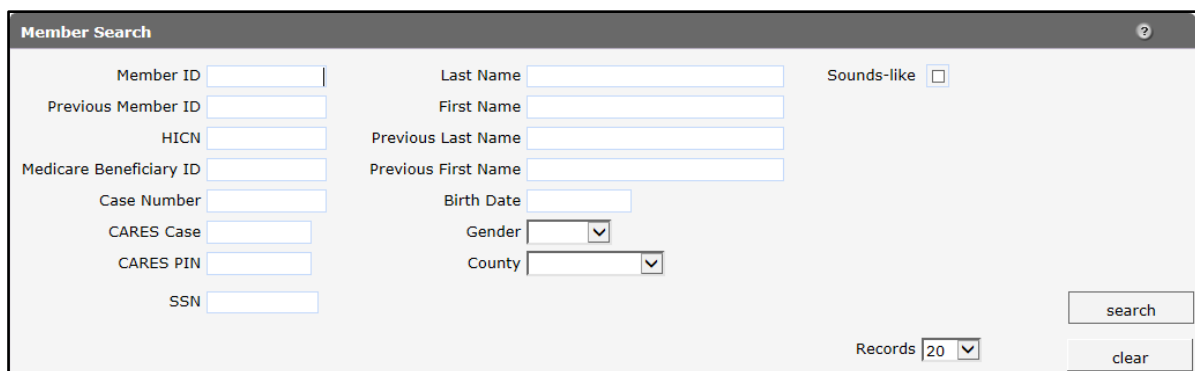


Figure 121 iC Functionality Page

# 15 Member

## 15.1 Member Search

1. On the iC Functionality page, click **Member Search**. The Member Search panel will be displayed.



The screenshot shows the 'Member Search' panel with the following fields and controls:

- Member ID (text input)
- Previous Member ID (text input)
- HICN (text input)
- Medicare Beneficiary ID (text input)
- Case Number (text input)
- CARES Case (text input)
- CARES PIN (text input)
- SSN (text input)
- Last Name (text input)
- First Name (text input)
- Previous Last Name (text input)
- Previous First Name (text input)
- Birth Date (text input)
- Gender (dropdown menu)
- County (dropdown menu)
- Sounds-like checkbox
- Records dropdown menu (set to 20)
- search button
- clear button

**Figure 122** Member Search Panel

This user guide explains how to complete a member search using a member's name. Users can search for a member using any of the fields on the Member Search panel but should enter as much information as possible to narrow the results.

If a search returns too many results, a message will indicate that additional criteria must be entered. If a search does not return any results, a "No rows found" message will be displayed in the Search Results panel. Users should ensure that the entered information is accurate and correct any inaccurate information.

Note: If no results are found when searching using a member ID, enter the member's ID in the Previous Member ID field in case the member's ID has changed. If the member is found, the member's information will be displayed with his or her new ID.

The Search Results panel will display 20 results per page by default. To change the number of results that display, select another number from the Records drop-down menu.

To clear information from all the fields on the Member Search panel, click **clear**.

2. Enter the member's last name in the Last Name field.

Check the **Sounds-like** box to perform a phonetic search on the member's last name. If the box is unchecked, an exact letter search will be performed.

3. Enter the member's first name in the First Name field.

- Click **search**. If only one member record is found, the Member Information page will be displayed. If multiple member records matching the entered search criteria are found, the records will be displayed in the Search Results panel.

The screenshot shows the 'Member Search' form with various input fields for Member ID, Previous Member ID, HICN, Medicare Beneficiary ID, Case Number, CARES Case, CARES PIN, SSN, Last Name, First Name, Previous Last Name, Previous First Name, Birth Date, Gender, and County. A 'Sounds-like' checkbox is also present. A 'Records' dropdown is set to 20. Below the form is a 'Search Results' table with columns: Member ID, Last Name, First Name, MI, Birth Date, SSN, MBI, Gender, and County. Two results are shown for MEMBER IMA.

Member ID	Last Name	First Name	MI	Birth Date	SSN	MBI	Gender	County
111111111	MEMBER	IMA		06/05/1980	333-33-3333		F	Dane
555555550	MEMBER	IMA		05/05/1970	555-55-5555		F	Dane

**Figure 123** Search Results Panel

The member information will be displayed by column (for example, Member ID, Last Name, First Name). To sort the results, click a column heading. Clicking a column heading once will sort the results in ascending order by that column. Clicking a column heading twice will sort the results in descending order.

- Click the applicable member record. The Member Information page will be displayed.

The screenshot shows the 'Member Information' page for member 000000000. The page is annotated with orange arrows and labels: '@neTouch sidebar' points to the left sidebar containing 'Quick Search' and 'Recent Searches'; 'Navigation toolbar' points to the top navigation bar with buttons like 'Open Tab', 'save', 'cancel', 'help', 'Audit', and 'Tabbed View'; 'Member Information Panel' points to the main content area. The main panel contains detailed member data including Name (DXCTESTB, CHERRY A), Address (123 MAIN STREET), Birth Date (06/09/1999), Gender (Female), Race (Hispanic), and various insurance and care management details.

**Figure 124** Member Information Page

The Member Information page consists of the following:

- @neTouch sidebar. The @neTouch sidebar contains a “Quick Search” section and a “Recent Searches” section.
  - The “Quick Search” section allows users to search for a new member record by entering either a member ID in the Member ID field or a Client Assistance for

Reemployment and Economic Support (CARES) case number in the Case Number field and clicking **search**. Users can click **clear** to delete information from the Member ID or Case Number fields or **prev** to return to the Member Search panel.

- The “Recent Searches” section displays the IDs of the last five members for whom users searched. Users can click an ID to populate that member’s information in the Member Information panel. Both search sections can be minimized by clicking the arrow on the right.
- Navigation toolbar. The navigation toolbar contains the Open Tab menu, the Help menu, and the Stacked/Tabbed View function. The other functions are unavailable.
  - The *Open Tab* menu provides access to panels that contain more detailed member information.
  - The *Help* menu provides access to information regarding the Member Information panel (Page Specific Help) or the panels available under the Open Tab menu (Tab Specific Help). A panel from the Open Tab menu must be selected for the Tab Specific Help option to be available.
  - The *Stacked/Tabbed View* function allows users to choose whether to display the panels available under the Open Tab menu in a stacked or tabbed view. In the stacked view, all panels that have been selected from the Open Tab menu will display together beneath the Member Information panel. In the tabbed view, the panels will display on different tabs located across the top of the panel, and users can switch between the panels by clicking the tabs. The shortcut for switching between the stacked and tabbed views is Alt+o. The screen captures in this user guide display the tabbed view option.
- Member Information panel.

### 15.1.1 Member Information Panel

The Member Information panel displays basic data about a member.

Member ID	0000000000	Name	DXCTESTB, CHERRY A	Active	Active
MCI Ind	Yes	Prev Name		Linked ID	
CARES Pin	5555555555	CARES Case	2222222222	Case History	0000000000 08/08/2017 ▼
Medicare Beneficiary ID		Address	123 MAIN STREET	Benefit Plan	BCSP 04/01/2017-12/31/2299 ▼
SSN	000-00-0000	Address 2		Medicare Cov	
Gender	Female	Address 3		Managed Care	TRANS 01/01/2019-12/31/2299 ▼
Birth Date	06/09/1999	City	ANYTOWN	MC Special Cond	L04 01/01/2017-05/15/2018 ▼
Death Date		State	WI	TPL	No
Age	22	Zip	53719-0000	Lockin	LIMED 01/01/2018-12/31/2299 ▼
Race	H - Hispanic	Alt Address	Yes	NH Level of Care	BI 04/01/2017-02/28/2018 ▼
Ethnicity	01 Hispanic or Latino	Phone	(555) 123-4567	Patient Liability	
Language	ENG - ENGLISH	Phone Type	Home	Deductible	
County	13 - Dane	Add Phone		Last HlthChk Scrn	
Tribal Ind	No	Add Type	No Phone	Last HlthChk Dntl	
				Incarceration	

Figure 125 Member Information Panel

The left column displays some of the following information:

- The *MCI Ind* field indicates whether or not a Master Client Index (MCI) indicator was assigned. The field will indicate *Yes* if the member's ID was assigned from the MCI database and *No* if the member's ID is temporary.
- The *CARES Pin* field displays the member's CARES personal identification number.
- The member's demographic data.

The middle column displays some of the following information:

- The member's name and previous name, if applicable.
- The member's CARES case number.
- The member's contact information.

The right column displays applicable member enrollment information such as the following:

- The *Active* field indicates *Active* if the ID in the Member ID field is current or *Inactive* if the ID is no longer used. If *Inactive* is displayed and the member has a more current ID, the most current ID would be displayed in the Linked ID field.

Note: Throughout this user guide, an *Active* status indicates that the displayed information is current. An *Inactive* or *History* status indicates that the displayed information is no longer used or is invalid. Inactive or historical information is maintained for informational or auditing purposes only.

- The *Linked ID* field displays information if the member has another ID that is linked to the member's present ID.
- The *Case History* menu displays the case ID with which the member is associated and the date(s) that the member's case ID was applied to interChange.
- The *Benefit Plan* menu displays the benefit plan(s) in which a member is or was enrolled. The field includes a benefit plan code and the effective dates of each plan.

Note: An end date of 12/31/2299 signifies an open end date.

- The *Medicare Cov* field displays the member's current Medicare coverage. The field may show one or more of the following:
  - a. *A* indicates Medicare Part A.
  - b. *B* indicates Medicare Part B.
  - c. *D* indicates Medicare Part D.

The field will be blank if the member does not have current coverage.

- The *Managed Care* field indicates if the member is enrolled in a BadgerCare Plus HMO, Medicare Supplemental Security Income (SSI) HMO, Family Care, Program for All Inclusive

Care for the Elderly, Family Care Partnership, or a children's health managed care plan (for example, Children Come First, Wraparound Milwaukee). The field also displays the effective and end dates of the member's enrollment.

- The *MC Special Cond* field displays the member's Managed Care Special Condition level of care (LOC) if they are enrolled in a long-term care managed care program and/or the member's exemption information, if applicable. The field also displays the effective and end dates related to the member's LOC or exemption.
- The *TPL* field displays a *Yes* or a *No* to indicate whether or not the member has current third-party (private) insurance coverage.
- The *Lockin* field indicates if the member is restricted to specific providers or if the member is enrolled in a hospice program. If a lock in is in effect, the effective and end dates will also be displayed.
- The *NH Level of Care* field displays nursing home LOC codes not related to managed care. The field also displays the effective and end dates of the member's LOC authorization.
- The *Patient Liability* field displays the monthly institutional liability or waiver cost share amounts the member must contribute to their cost of care. The field also displays the effective and end dates of the cost share.
- The *Deductible* field indicates the member's current SeniorCare deductible and the effective and end dates for which the member's SeniorCare deductible was applied. This field does not apply to private insurance.
- The *Last HlthChk Scrn* field displays the date of the member's last HealthCheck screening.
- The *Last HlthChk Dntl* field displays the date of the member's last dental screening that was provided as a HealthCheck service.
- The *Incarceration* field indicates the incarceration effective date and end date for members with active incarceration information.



### 15.1.2 Open Tab Menu

Hover over Open Tab on the navigation toolbar to display the Open Tab menu. The Open Tab menu displays seven different menu options; however, only the Member menu option is available.

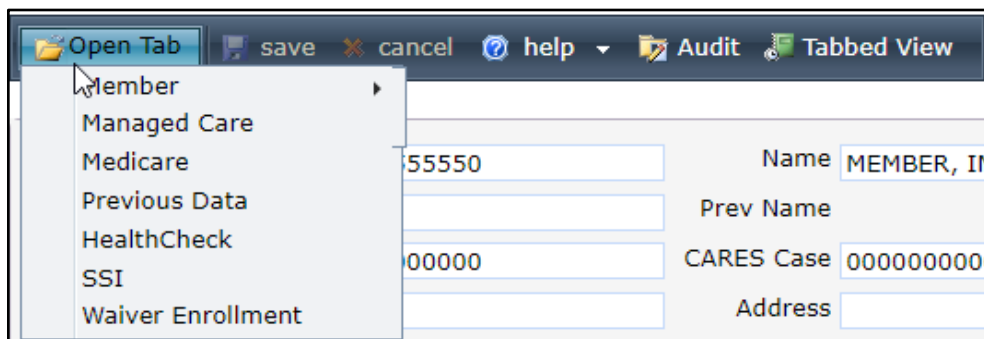


Figure 126 Open Tab Menu

### Member Menu

Hover over Member on the Open Tab menu to display menu options for panels containing a member's base information and review status.

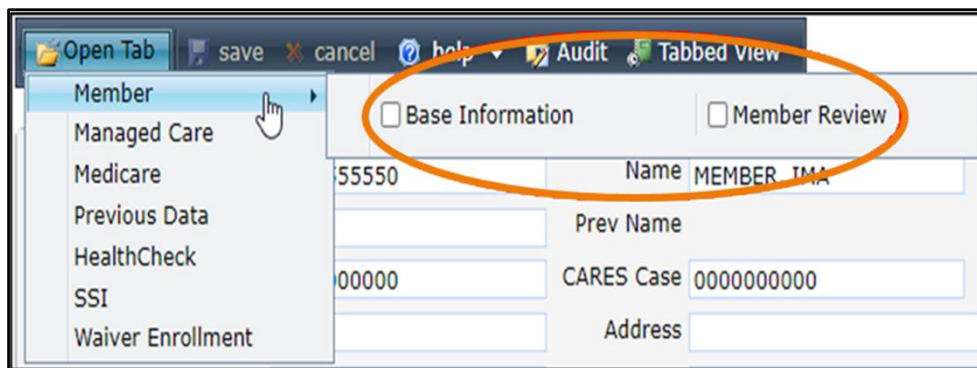


Figure 127 Member Menu

Panels listed under menus operate under the following principles:

- Clicking a panel name will open the selected panel.
- Checking the box next to the panel name causes the panel to automatically display each time that menu is accessed, even in subsequent Portal sessions.
- Panel names that are highlighted indicate the panel is currently open.
- Panel names that are italicized indicate the panel is inaccessible to the user.

### Base Information Panel

The Base Information panel displays basic information about a member.

1. Select **Base Information** from the Member Menu. The Base Information panel will be displayed.

**Base Information**

Member ID: 0987654321 | Last Name: MEMBER  
 MCI Ind: Y | First Name: IM  
 CARES Pin: 0000000000 | MI: A  
 CARES Case: 0000000000 | Name Suffix:   
 SSN: 000-00-0000 | Address: 123 MAIN ST  
 Gender:   
 Birth Date: 04/06/1980 | Address 2:   
 Death Date: | Address 3:   
 Asian:  | City: ANYTOWN  
 Black/African American:  | State: WI  
 American Indian/Alaskan Native:  | Zip: 55555 0000  
 Native Hawaiian/Other Pacific Islander:  | Phone:   
 White:  | Phone Type: No Phone  
 Ethnicity: 00 Not Hispanic or Latino | Add Phone Number:   
 Language: UNDETERMINED | Add Phone Type: No Phone  
 County: Dane | Marital Status: UNREPORTED  
 Tribal Ind: No | Living Arrangement: Other  
 Migrant Worker: No

Clear MCI

Figure 128 Base Information Panel

### Member Review Panel

The Member Review panel displays if a member is on review and describes why.

1. Click **Member Review** from the Member menu. The Member Review panel will be displayed.
2. Click the applicable row to populate information in the fields on the panel.

**Member Review** X

Review Reason	Review Requestor	Effective Date	End Date
D - Divestment	C - IM Worker	01/15/2015	12/16/2015

Review Reason: D - Divestment | Effective Date: 01/15/2015  
 Review Requestor: C - IM Worker | End Date: 12/16/2015

delete | add

Figure 129 Member Review Panel

The Member Review panel may include the following information:

- The *Review Reason* field indicates the reason the member was put on review (for example, Divestment).

Note: Divestment information is sent to interChange through the CARES interface. The ForwardHealth Call Center will review the penalty period start date before the

information is added to interChange and will consider adverse action and notice requirements.

- The *Review Requestor* indicates the person who determined that the member should be put on review (for example, IM Worker).
- The *Effective Date* field displays the first date of service (DOS) the member review is effective.
- The *End Date* field displays the last DOS the member review is effective.

# 16 Appendix: Portal Help Desk Support

Users may contact the Portal Helpdesk with questions about configuring supported web browsers or technical questions on Portal functions, including Portal accounts, registrations, passwords, and submissions through the Portal.

- Phone: 866-908-1363
- Email: [vedswiedi@wisconsin.gov](mailto:vedswiedi@wisconsin.gov)