

# User Guide

## Electronic Visit Verification Portal Functionality

August 11, 2025



WISCONSIN DEPARTMENT  
*of* HEALTH SERVICES

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# 1 Introduction

Electronic visit verification (EVV) is a system that uses technology to make sure that members and participants receive the services they need. Workers check in at the beginning and check out at the end of each visit, using a smart phone or tablet, small digital device, or landline phone.

Setting up a secure ForwardHealth Provider Portal account will start the training process with the Wisconsin Department of Health Services (DHS) EVV system. A Portal account also allows the provider to conduct business with DHS, including maintaining worker information and making updates to business information. ForwardHealth brings together many DHS health care programs with the goal to create efficiencies for providers and to improve health outcomes for enrolled members.



## 2 Provider Enrollment

In order for EVV information to be correctly associated to claims and encounters, DHS requires all providers and workers to have a Medicaid provider ID number regardless of the EVV-system used. To generate this ID, providers will need to follow the steps below.

1. Access the ForwardHealth Portal (the Portal) at [forwardhealth.wi.gov/](https://forwardhealth.wi.gov/).

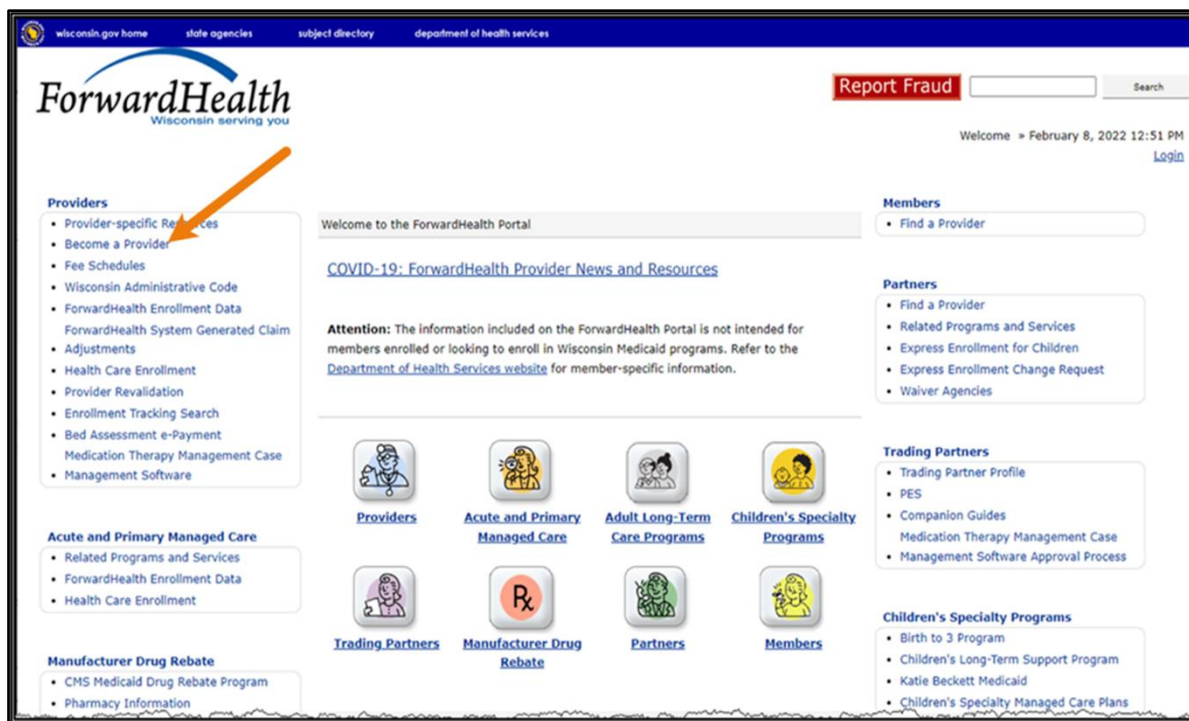
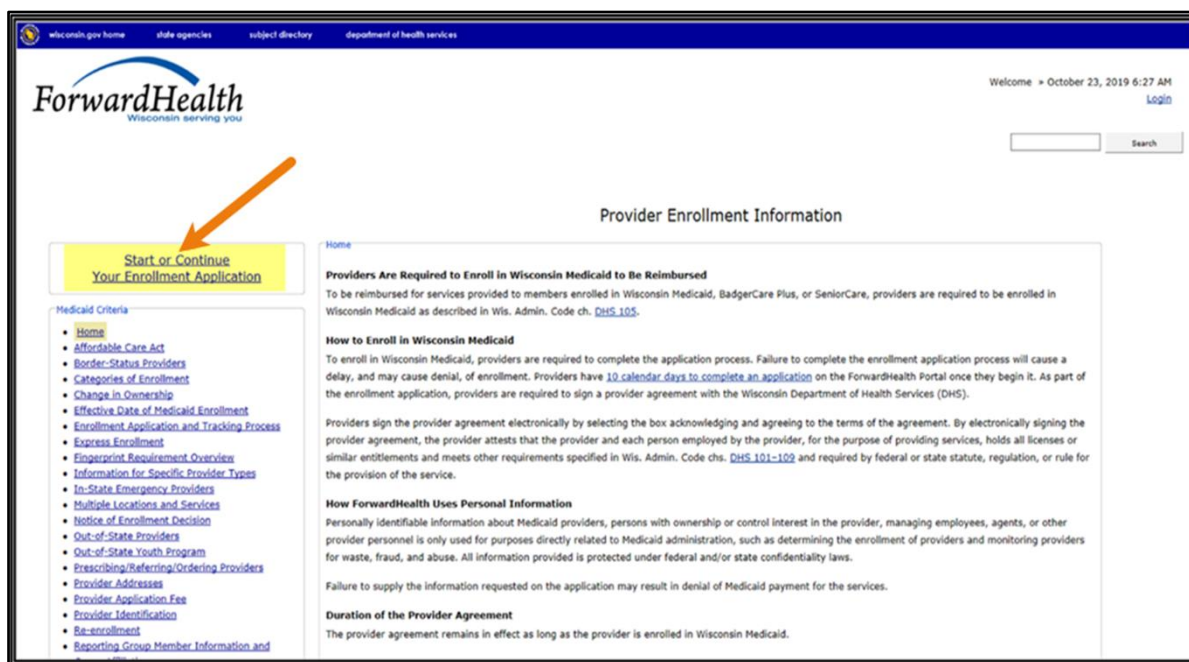


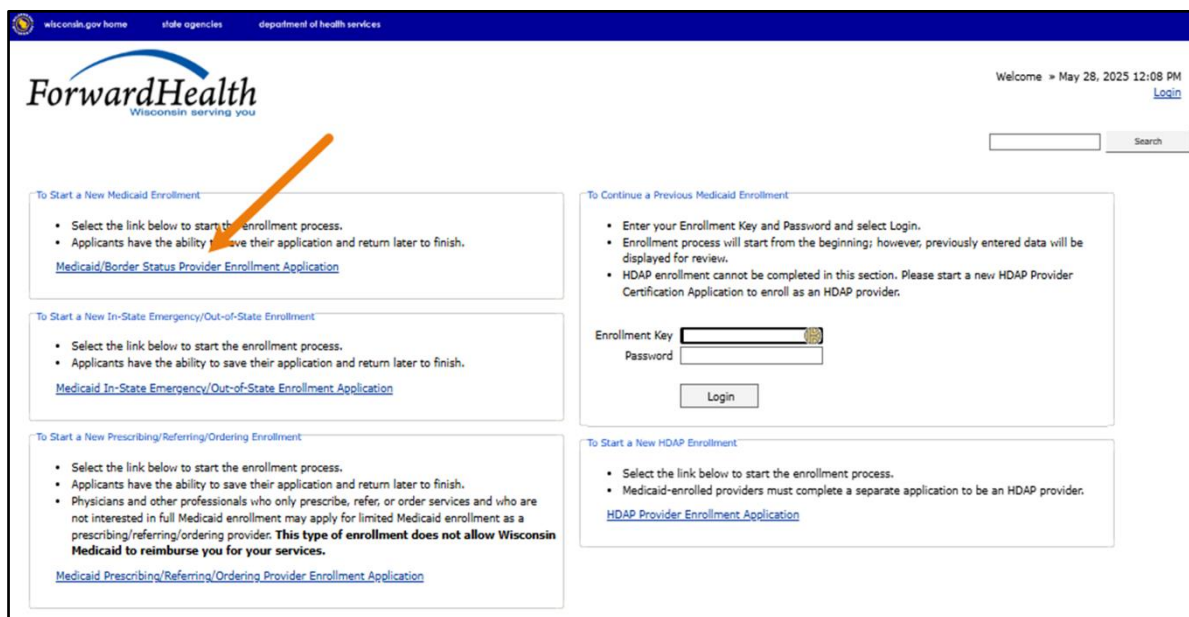
Figure 1 Portal Homepage

- Click **Become a Provider**. The Provider Enrollment Information page will be displayed.



**Figure 2** Provider Enrollment Information Page

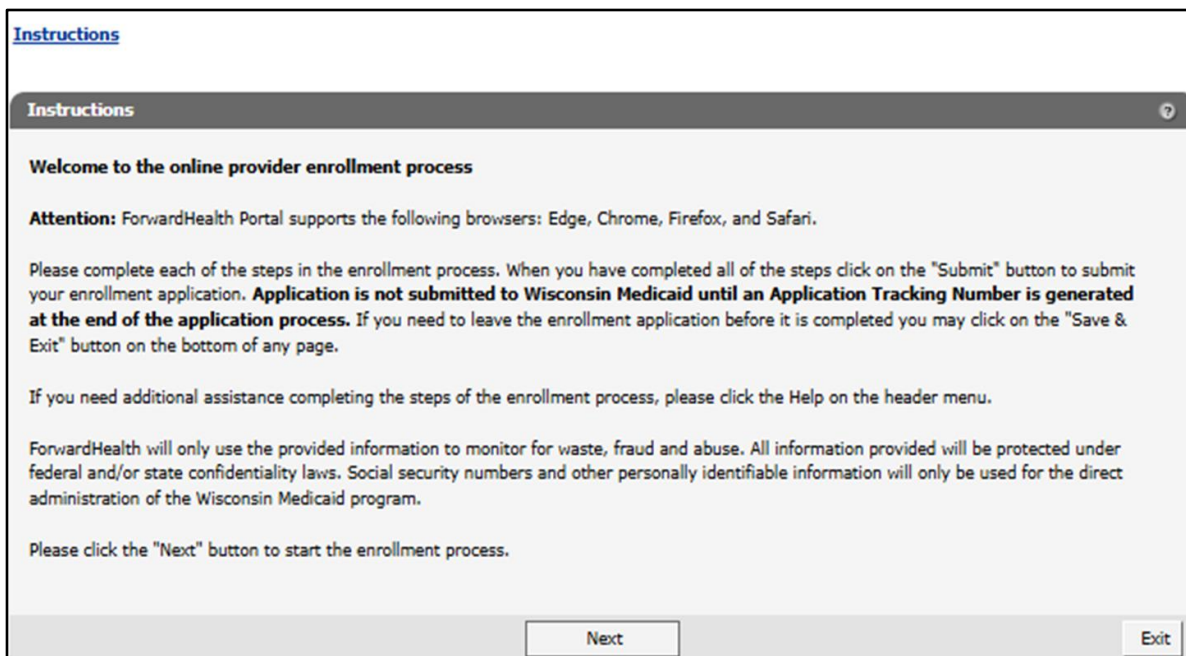
- Click **Start or Continue Your Enrollment Application**. The Enrollment Application page will be displayed.



**Figure 3** Enrollment Application Page

- Click **Medicaid/Border Status Provider Enrollment Application**.

The Instructions panel will be displayed.



The screenshot shows a web browser window with a tab titled "Instructions". The page content includes a heading "Welcome to the online provider enrollment process", an attention notice about supported browsers, detailed instructions on the enrollment process, a privacy statement, and a "Next" button at the bottom.

[Instructions](#)

### Instructions

**Welcome to the online provider enrollment process**

**Attention:** ForwardHealth Portal supports the following browsers: Edge, Chrome, Firefox, and Safari.

Please complete each of the steps in the enrollment process. When you have completed all of the steps click on the "Submit" button to submit your enrollment application. **Application is not submitted to Wisconsin Medicaid until an Application Tracking Number is generated at the end of the application process.** If you need to leave the enrollment application before it is completed you may click on the "Save & Exit" button on the bottom of any page.

If you need additional assistance completing the steps of the enrollment process, please click the Help on the header menu.

ForwardHealth will only use the provided information to monitor for waste, fraud and abuse. All information provided will be protected under federal and/or state confidentiality laws. Social security numbers and other personally identifiable information will only be used for the direct administration of the Wisconsin Medicaid program.

Please click the "Next" button to start the enrollment process.

Next Exit

**Figure 4** Instructions Panel

5. Read the instructions. Click **Next** to continue. The Type of Applicant panel will be displayed.

Note: All required fields are indicated with an asterisk (\*).

The screenshot shows a web application window titled "Type of Applicant". At the top, there are navigation links: "Instructions" and "Type of Applicant". Below the title bar, there are two bullet points: "Required fields are indicated with an asterisk (\*)" and "If you are a sole Proprietor, select Organization." The main content area contains a section titled "Type of Applicant \*" with two radio button options: "Individual" and "Organization". At the bottom of the window, there are four buttons: "Previous", "Next", "Save & Exit", and "Exit".

**Figure 5** Type of Applicant Panel

6. Select **Organization** under **Type of Applicant\***.
7. Click **Next**. The Type of Enrollment panel will be displayed.

The screenshot shows a web application window titled "Type of Enrollment". At the top, there are navigation links: "Instructions", "Type of Applicant", and "Type of Enrollment". Below the title bar, there is a note: "Required fields are indicated with an asterisk (\*)". Below this, there is a bullet point: "If you are a previously enrolled provider in the same provider type, select Re-enrollment of a Previous Enrollment." The main content area contains a section titled "Select type of enrollment \*" with three radio button options: "Initial Enrollment", "Re-enrollment of a Previous Enrollment", and "Change Of Ownership". Below the "Re-enrollment of a Previous Enrollment" option, there is a text input field labeled "Previous Provider ID". Below the "Change Of Ownership" option, there are two text input fields: "Previous Provider ID" and "Change of Ownership Effective Date". At the bottom of the window, there are four buttons: "Previous", "Next", "Save & Exit", and "Exit".

**Figure 6** Type of Enrollment Panel

8. Select Initial Enrollment.
9. Click **Next**.

The Provider Type panel will be displayed.

[Instructions](#) » [Type of Applicant](#) » [Type of Enrollment](#) » [Provider Type](#)

### Provider Type

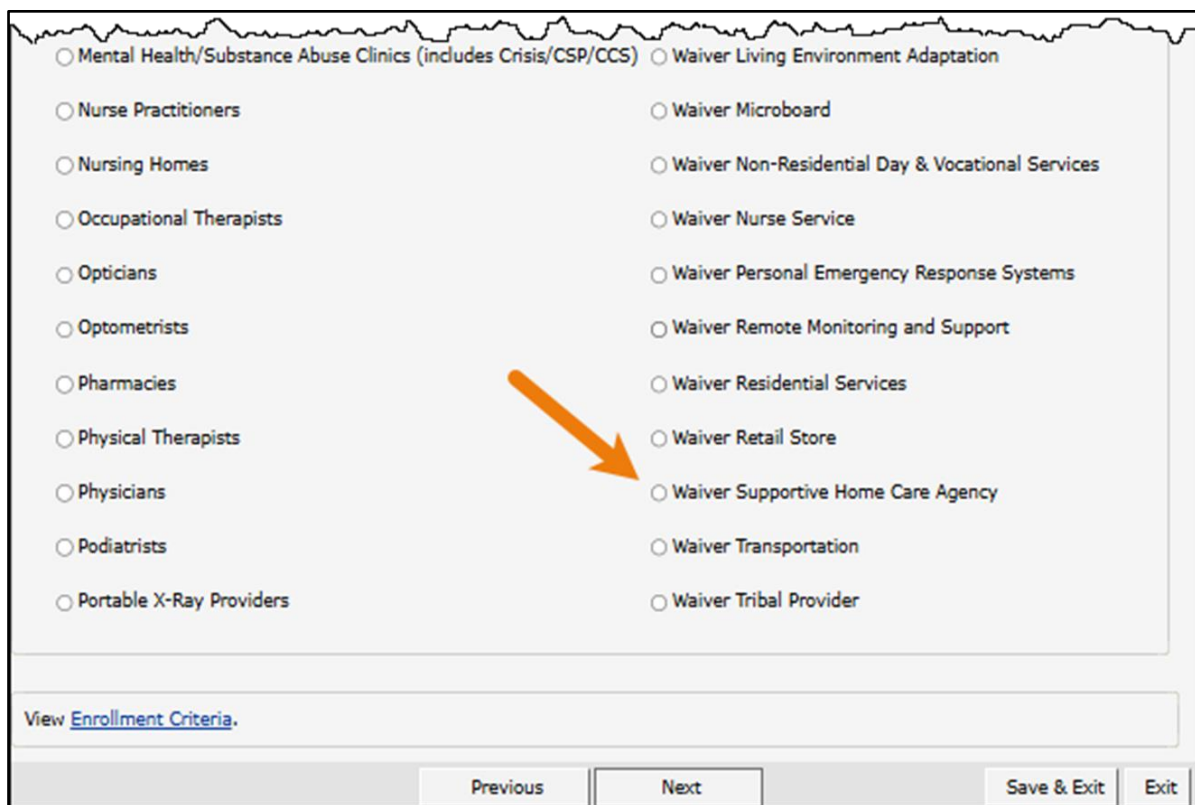
Required fields are indicated with an asterisk (\*).

Provider Type\*

<input type="radio"/> Ambulance Providers	<input type="radio"/> Prenatal Care Coordination Providers
<input type="radio"/> Ambulatory Surgery Centers	<input type="radio"/> Psychotherapist Group
<input type="radio"/> Anesthetist	<input type="radio"/> Rehabilitation Agencies
<input type="radio"/> Audiologists	<input type="radio"/> Residential SUD Treatment
<input type="radio"/> Case Management Providers	<input type="radio"/> Rural Health Clinics
<input type="radio"/> Chiropractors	<input type="radio"/> School-Based Services Providers
<input type="radio"/> Community Recovery Services	<input type="radio"/> Specialized Medical Vehicle Providers
<input type="radio"/> Dental Providers	<input type="radio"/> Speech & Hearing Clinics
<input type="radio"/> End-Stage Renal Disease Service Providers	<input type="radio"/> Speech Pathology/Therapy
<input type="radio"/> Family Planning Clinics	<input type="radio"/> Supportive Housing Agency
<input type="radio"/> Federally Qualified Health Centers	<input type="radio"/> Therapy Groups
<input type="radio"/> HealthCheck Providers	<input type="radio"/> WIC Agency
<input type="radio"/> Hearing Instrument Specialists	<input type="radio"/> WIMCR Regionalization
<input type="radio"/> Home Health Agencies / Personal Care Agencies	<input type="radio"/> Waiver Aging and Disability Support Agency
<input type="radio"/> Hospice Providers	<input type="radio"/> Waiver Community Services & Support
<input type="radio"/> Independent Labs	<input type="radio"/> Waiver Counseling & Therapeutic Services
<input type="radio"/> Inpatient/Outpatient Hospital Providers	<input type="radio"/> Waiver Equipment & Accessibility Related Services
<input type="radio"/> Institute for Mental Disease	<input type="radio"/> Waiver Financial Management
<input type="radio"/> Medical Equipment Vendors	<input type="radio"/> Waiver Health and Wellness
<input type="radio"/> Medical Supply Providers	<input type="radio"/> Waiver Interpreter
<input type="radio"/> Mental Health/Substance Abuse Clinics (includes Crisis/CSP/CCS)	<input type="radio"/> Waiver Living Environment Adaptation
<input type="radio"/> Nurse Practitioners	<input type="radio"/> Waiver Microboard
<input type="radio"/> Nursing Homes	<input type="radio"/> Waiver Non-Residential Day & Vocational Services
<input type="radio"/> Occupational Therapists	<input type="radio"/> Waiver Nurse Service
<input type="radio"/> Opticians	<input type="radio"/> Waiver Personal Emergency Response Systems
<input type="radio"/> Optometrists	<input type="radio"/> Waiver Remote Monitoring and Support
<input type="radio"/> Pharmacies	<input type="radio"/> Waiver Residential Services
<input type="radio"/> Physical Therapists	<input type="radio"/> Waiver Retail Store
<input type="radio"/> Physicians	<input type="radio"/> Waiver Supportive Home Care Agency

**Figure 7** Provider Type Panel

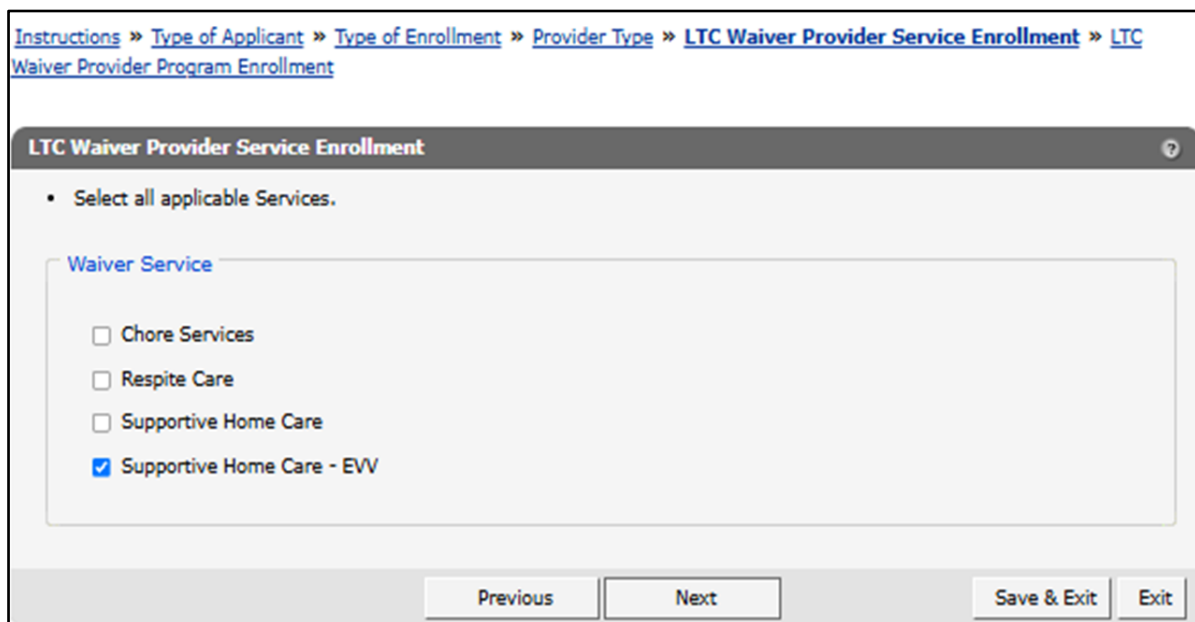
10. Select **Waiver Supportive Home Care Agency**.



The screenshot shows a web form titled "Provider Type Panel". It contains two columns of radio button options. The left column lists various professional roles: Mental Health/Substance Abuse Clinics (includes Crisis/CSP/CCS), Nurse Practitioners, Nursing Homes, Occupational Therapists, Opticians, Optometrists, Pharmacies, Physical Therapists, Physicians, Podiatrists, and Portable X-Ray Providers. The right column lists various waiver services: Waiver Living Environment Adaptation, Waiver Microboard, Waiver Non-Residential Day & Vocational Services, Waiver Nurse Service, Waiver Personal Emergency Response Systems, Waiver Remote Monitoring and Support, Waiver Residential Services, Waiver Retail Store, Waiver Supportive Home Care Agency, Waiver Transportation, and Waiver Tribal Provider. An orange arrow points to the "Waiver Supportive Home Care Agency" option. At the bottom, there is a link "View Enrollment Criteria." and four buttons: "Previous", "Next", "Save & Exit", and "Exit".

**Figure 8** Provider Type Panel—Waiver Support Home Care Agency

11. Click **Next**. The LTC Waiver Provider Service Enrollment panel will be displayed.



The screenshot shows a web form titled "LTC Waiver Provider Service Enrollment". At the top, there is a breadcrumb trail: "Instructions » Type of Applicant » Type of Enrollment » Provider Type » LTC Waiver Provider Service Enrollment » LTC Waiver Provider Program Enrollment". Below the title bar, there is a section "Select all applicable Services." followed by a "Waiver Service" section. This section contains four checkboxes: "Chore Services", "Respite Care", "Supportive Home Care", and "Supportive Home Care - EVV". The "Supportive Home Care - EVV" checkbox is checked. At the bottom, there are four buttons: "Previous", "Next", "Save & Exit", and "Exit".

**Figure 9** LTC Waiver Provider Service Enrollment Panel



12. Select Supportive Home Care – EVV and any other applicable services.
13. Click **Next**. The LTC Waiver Provider Program Enrollment panel will be displayed.

[Instructions](#) » [Type of Applicant](#) » [Type of Enrollment](#) » [Provider Type](#) » [LTC Waiver Provider Service Enrollment](#) » [LTC Waiver Provider Program Enrollment](#)

**LTC Waiver Provider Program Enrollment**

- Select all applicable Programs.

**Waiver Program**

- ☐ Family Care
- ☐ Family Care Partnership
- ☐ IRIS:Include, Respect, I Self-Direct
- ☐ PACE:Program of All-Inclusive Care for the Elderly

[Previous](#) [Next](#) [Save & Exit](#) [Exit](#)

**Figure 10** LTC Waiver Provider Program Enrollment Panel

14. Select all applicable waiver program(s).
15. Click **Next**.
16. Follow the on-screen prompts and complete the remaining provider enrollment application information. Note: The user can save and exit a provider enrollment application at any time by clicking **Save & Edit** at the bottom right of the screen.
17. Submit the completed provider enrollment application request. Note: ForwardHealth usually notifies the provider of their enrollment status within 10 business days after receiving the **complete** enrollment application, but no longer than 60 days.
18. Once the provider enrollment application request has been approved, the provider can request Portal access.

### 3 Request Portal Access

Providers will need a PIN to establish a Provider Portal account. Providers can establish as many provider Portal accounts as needed for their business.

1. To request a PIN, access the Portal at [forwardhealth.wi.gov/](https://forwardhealth.wi.gov/).

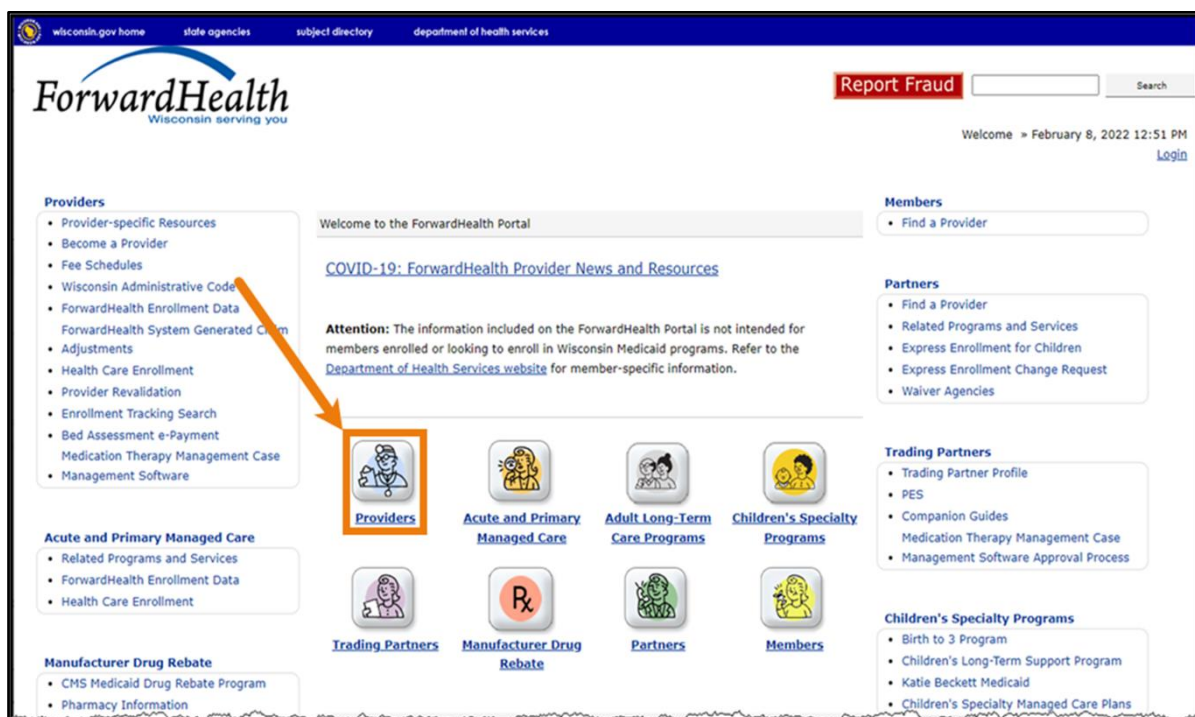


Figure 11 Portal Homepage



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

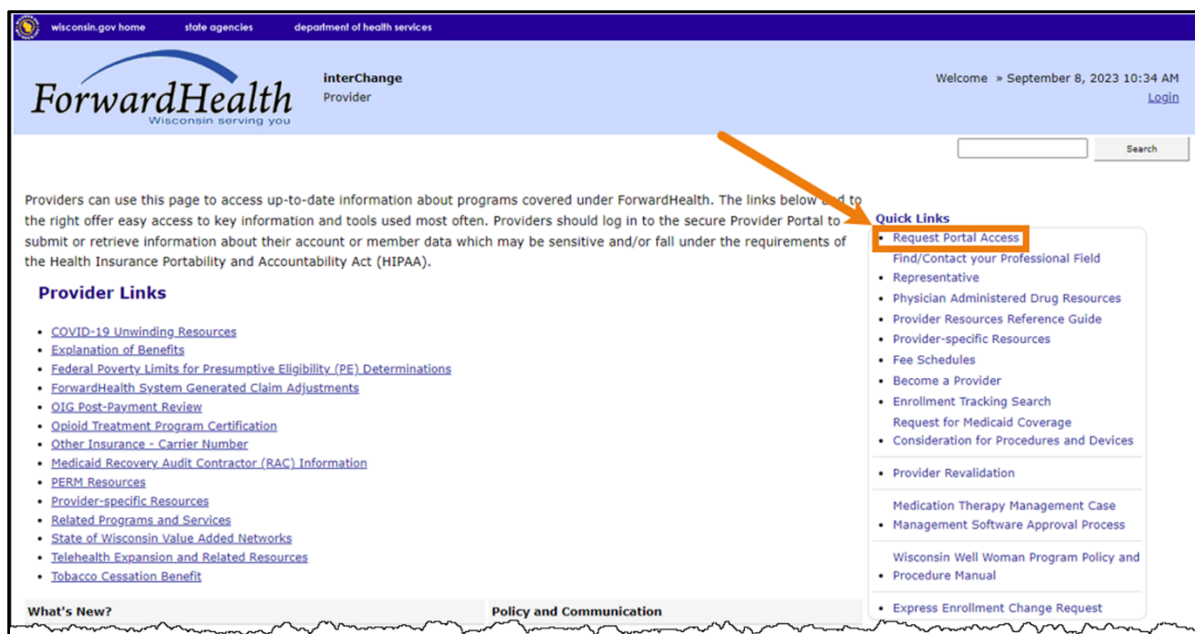


Figure 12 Public Provider Page

3. 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 13** Request Portal Access Page

4. Complete **either** the “Selected NPI” or “Provider Number Information” sections. 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.
5. From the Financial Payer drop-down menu, select the financial payer certification for which the provider is requesting a Provider Portal account.

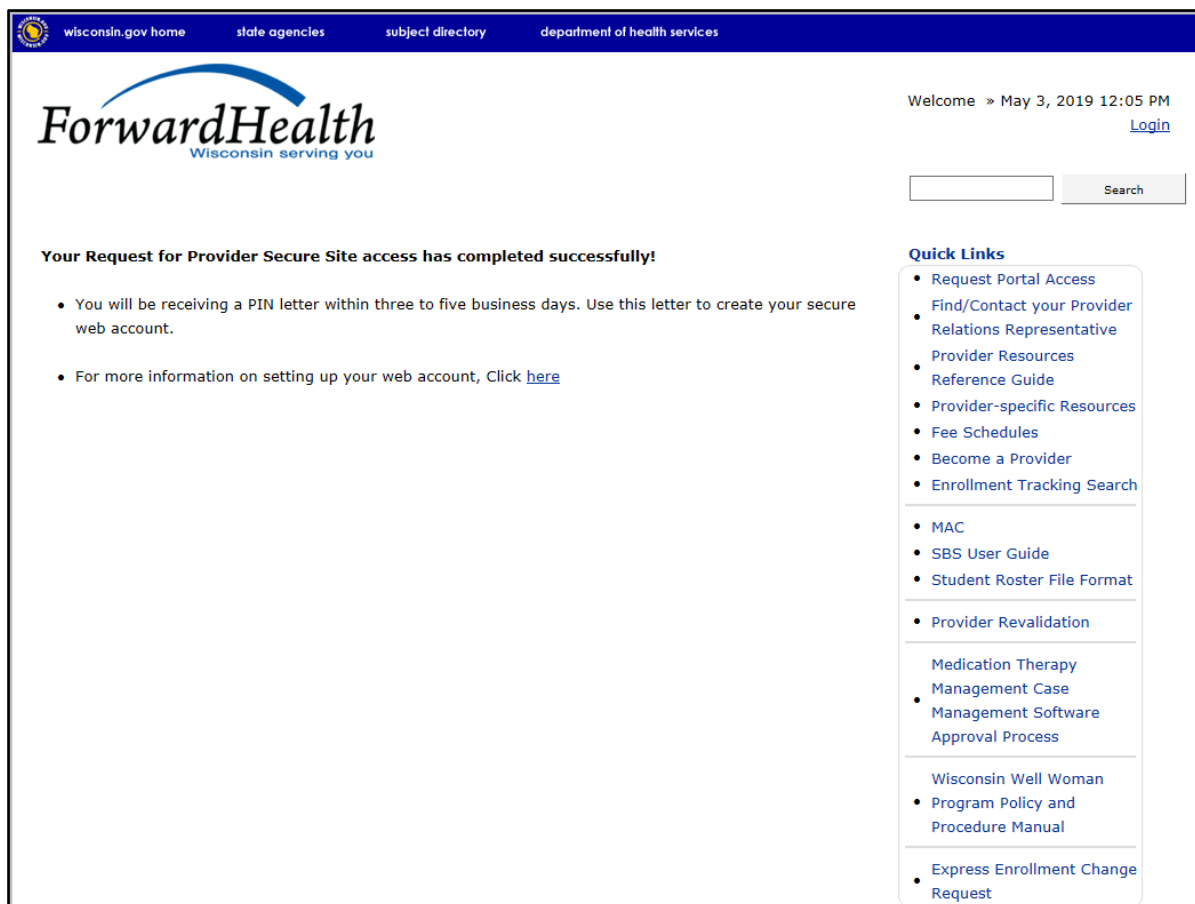
6. Enter the provider's Social Security Number (SSN) or Taxpayer Identification Number (TIN) in the SSN or TIN field.



The screenshot shows a web form titled "Provider Number Information \*". It contains three input fields: "Provider ID" with the value "01234567", "Financial Payer" with a dropdown menu showing "Medicaid", and "SSN or TIN" with the value "000000000". At the bottom right of the form are two buttons: "Submit" and "Cancel".

**Figure 14** Provider Number Information Section

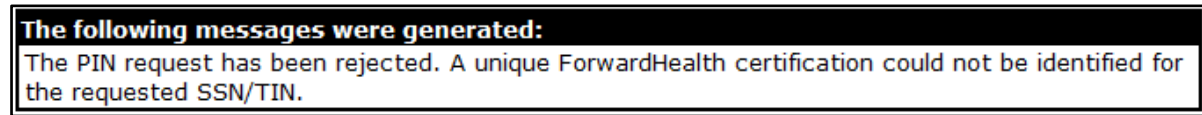
7. Click **Submit**. If the request is successful, a confirmation page will be displayed.



The screenshot shows the ForwardHealth website confirmation page. The header includes navigation links: "wisconsin.gov home", "state agencies", "subject directory", and "department of health services". The ForwardHealth logo is on the left, and the text "Welcome » May 3, 2019 12:05 PM" and a "Login" link are on the right. A search bar is also present. The main content area displays the message: "Your Request for Provider Secure Site access has completed successfully!". Below this message are two bullet points: "You will be receiving a PIN letter within three to five business days. Use this letter to create your secure web account." and "For more information on setting up your web account, Click [here](#)". On the right side, there is a "Quick Links" section with a list of links: "Request Portal Access", "Find/Contact your Provider Relations Representative", "Provider Resources", "Reference Guide", "Provider-specific Resources", "Fee Schedules", "Become a Provider", "Enrollment Tracking Search", "MAC", "SBS User Guide", "Student Roster File Format", "Provider Revalidation", "Medication Therapy Management Case Management Software Approval Process", "Wisconsin Well Woman", "Program Policy and Procedure Manual", and "Express Enrollment Change Request".

**Figure 15** 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 16** 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–Friday, 8:30 a.m.–4:30 p.m.

After a provider has successfully requested Portal access, a letter containing a Personal Identification Number (PIN) will be mailed to the provider within three to five business days. 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.

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

## 4 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 username and password as well as to enter contact and security information.

### 4.1 Logging in for First Time

1. After the PIN letter is received, access the Portal at [forwardhealth.wi.gov/](https://forwardhealth.wi.gov/).

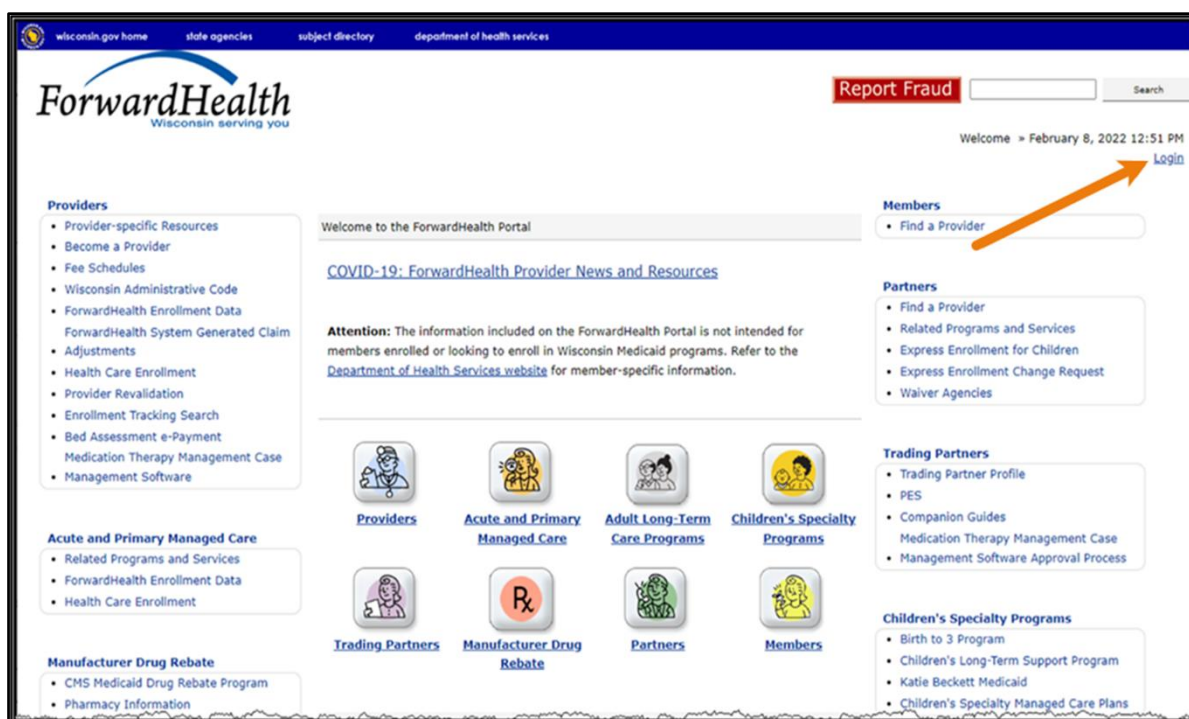



Figure 18 Portal Homepage

2. Click **Login**.

3. A Sign In box will be displayed.

Connecting to 

Sign in with your account to access WIPortal

**ForwardHealth**  
Wisconsin serving you

Sign In

Username

☐ Keep me signed in

Next

[Unlock account?](#)

[Help](#)

[Logging in for the first time?](#)

Powered by Okta

Privacy Policy

**Figure 19** Sign-In Box

4. 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 20** Account Setup Page

5. Enter the Login ID and PIN listed in the PIN letter.

For security purposes, the PIN letter will contain only four digits of the Provider ID reported; however, users should **enter their entire** 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.



6. Click **Setup Account**. The Administrator setup page will be displayed.

**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\*

**Administrator Backup**

Contact First Name\*

Contact Last Name\*

Job Title\*

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 21** Account User Profile Page

7. Enter information in the fields for the Administrator Information and Administrator Backup sections. 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 automatically format.

Note: The administrator backup email addresses cannot match those of the current administrator.

8. Read the Security and Confidentiality agreement.

9. Check the agreement checkbox.
10. Click **Submit**. If an error message is received, 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. This allows users to access the secure Portal as they are billing Medicaid.

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  
**Submit Agreement**

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

**Figure 22** End User Point and Click License Agreements

11. 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 area of the Portal.

12. The user's secure Provider page will be displayed. Users will have access to the links located under the Home Page, Quick Links, and Electronic Visit Verification Links sections.

wisconsin.gov home   state agencies   department of health services

**ForwardHealth** Wisconsin serving you  
interChange Provider

Welcome Provider Name » June 5, 2025 3:23 PM [Logout](#)

Home | Search | **Providers** | Enrollment | Max Fee Home | Account | Contact Information | Online Handbooks | Site Map | iC Functionality | User Guides | Certification | Message Center

You are logged in with Provider ID: 000000000

[Providers](#)

**What's New?**

Providers can improve efficiency while reducing overhead and paperwork by using real-time applications available on the new ForwardHealth Portal. Submission and tracking of claims and prior authorization requests and amendments, on-demand access to remittance information, 835 trading partner designation, and instant access to the most current ForwardHealth information is now available.

- New Rate Reform Part 3 Ideas/Recommendations Requested.
- Incentive Payments. . . Are you Eligible?
- ForwardHealth System Generated Claim Adjustments

**Messages**

**You have no messages.**

The information contained in this message is confidential and is intended solely for the use of the person or entity named above. This message may contain individually identifiable information that must remain confidential and is protected by state and federal law. If the reader of this message is not the intended recipient, the reader is hereby notified that any dissemination, distribution or reproduction of this message is strictly prohibited. If you have received this message in error, please immediately notify the sender by telephone and destroy the original message. We regret any inconvenience and appreciate your cooperation

**Home Page**

- Update User Account
- Customize Home Page
- Update Adult LTC Waiver
- Service(s) or Programs(s)
- Demographic Maintenance
- Check My Revalidation Date
- Revalidate Your Provider
- Enrollment
- Check Enrollment
- Provider Enrollment Upload File
- Check
- ForwardHealth E-payment

**Quick Links**

- Register for E-mail Subscription
- Provider-specific Resources
- Request Portal Access
- Designate 835 Receiver
- Online Handbooks
- ForwardHealth Updates
- Fee Schedules
- Forms
- Become a Provider
- Enrollment Tracking Search
- Training Listing
- Explanation of Benefits (EOBs)
- Upload Audit Documentation
- Audit Correspondence

**Electronic Visit Verification Links**

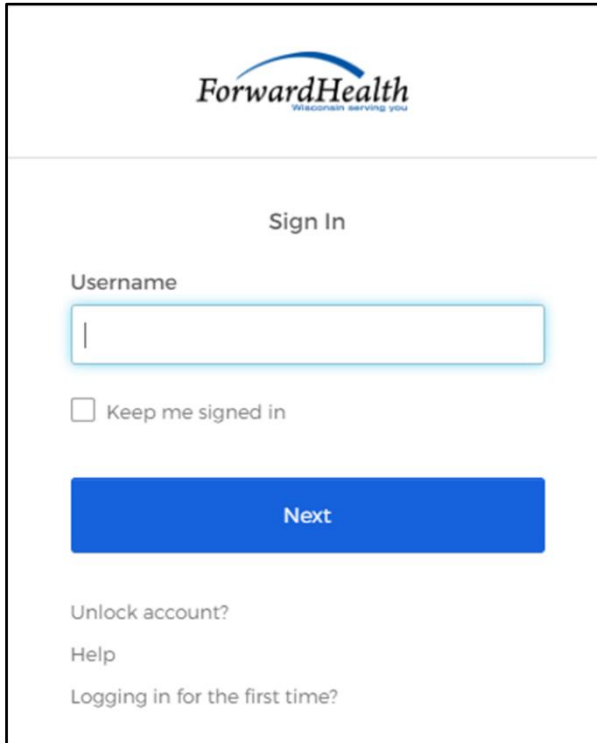
- Add Worker
- Upload Worker File
- Manage Workers
- List of Workers within your agency
- EVV Portal Functionality User Guide

**Wisconsin EVV Customer Care - 833-931-2035.**

**Figure 23** Secure Provider Page

## 4.2 Reset Password

1. Access the Portal at [forwardhealth.wi.gov/](https://forwardhealth.wi.gov/).
2. Click **Login**. A Sign In box will be displayed.

The image shows a web form titled "Sign In" for ForwardHealth. At the top is the ForwardHealth logo with the tagline "wisconsin serving you". Below the title is a "Username" label and a text input field. Under the input field is a checkbox labeled "Keep me signed in". A large 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?".

**ForwardHealth**  
wisconsin serving you

Sign In

Username

☐ Keep me signed in

Next

Unlock account?

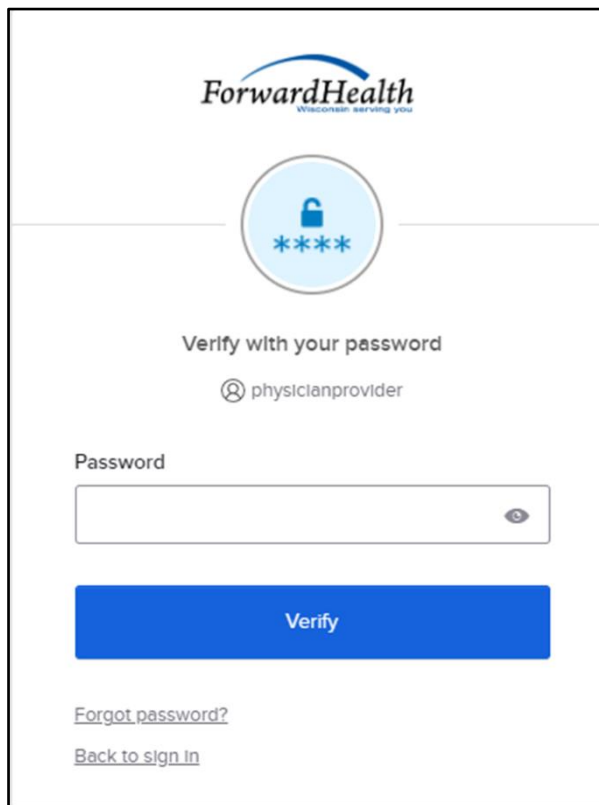
Help

Logging in for the first time?

**Figure 24** Sign-In Box

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

A Verify with your password box will be displayed.



**ForwardHealth**  
wisconsin serving you

\*\*\*\*

Verify with your password

physicianprovider

Password

Verify

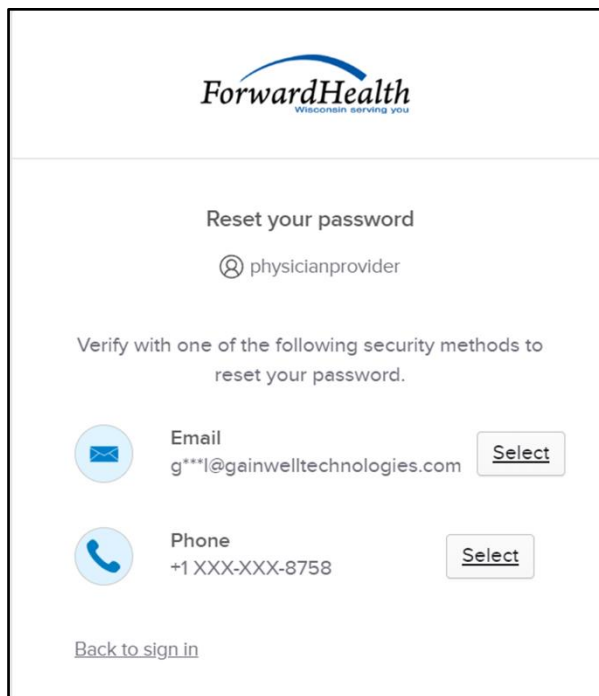
[Forgot password?](#)

[Back to sign in](#)

**Figure 25** Verify With Your Password Box

5. Click **Forgot password?**

A Reset your password box will be displayed.



**ForwardHealth**  
Wisconsin serving you

---

Reset your password

🔒 physicianprovider

Verify with one of the following security methods to reset your password.

Email  
g\*\*\*l@gainwelltechnologies.com [Select](#)

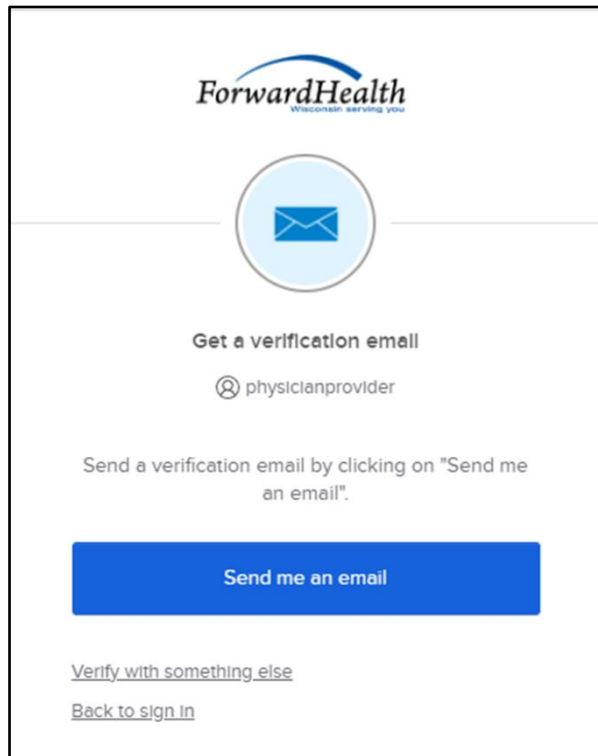
Phone  
+1 XXX-XXX-8758 [Select](#)

[Back to sign in](#)

**Figure 26** Reset Your Password Box

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

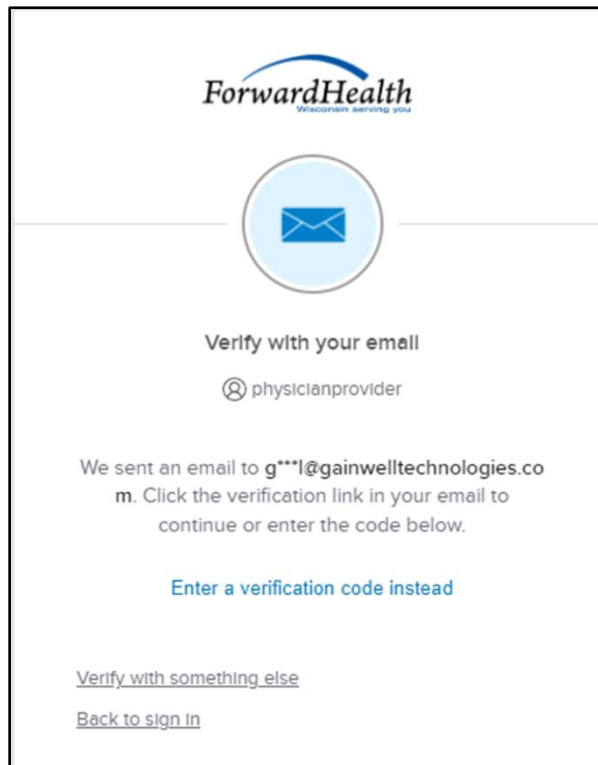
- If the user clicks **Select** for email:
  - a. A Get a verification email box will be displayed.



**Figure 27** 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.

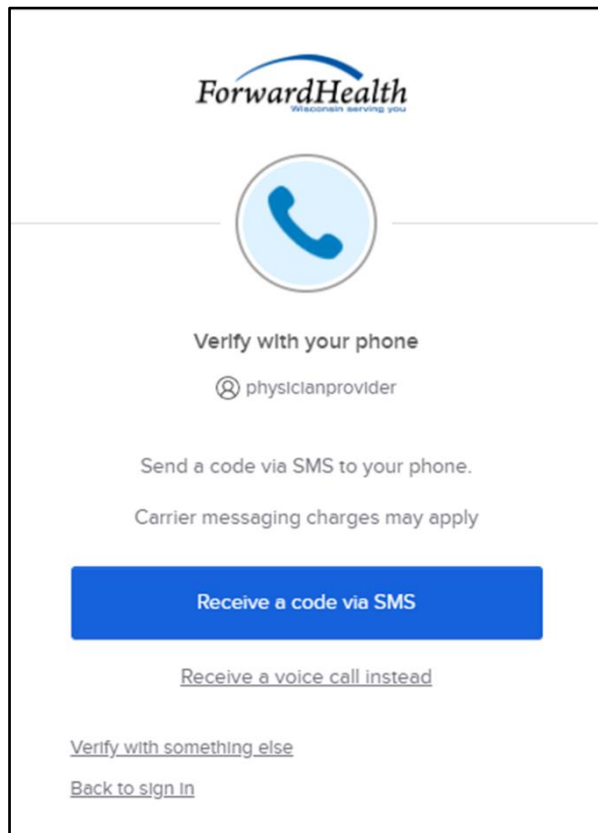


**Figure 28** Verify With Your Email Box

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



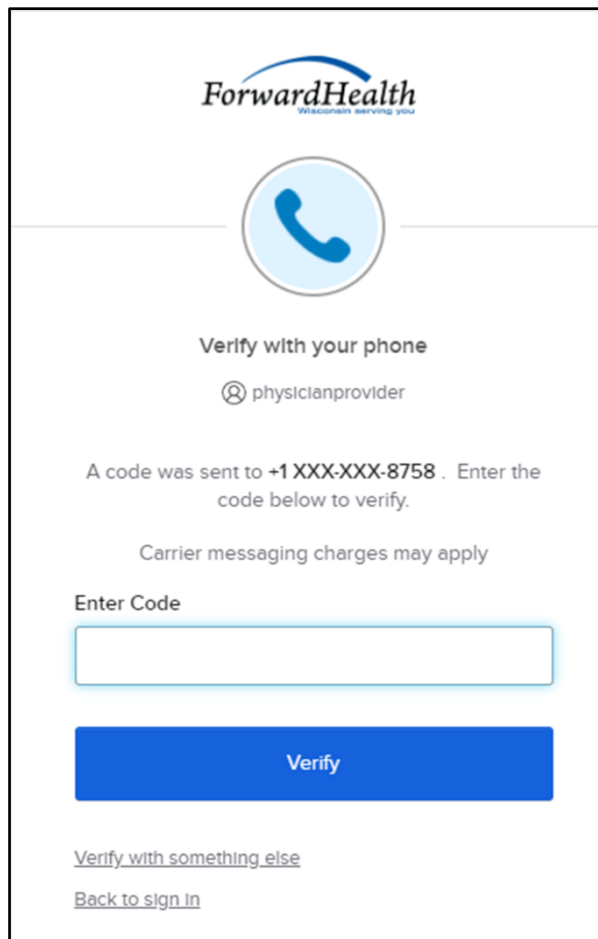
- If the user clicks **Select** for phone:
  - a. A Verify with your phone box will be displayed.




**Figure 29** 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**

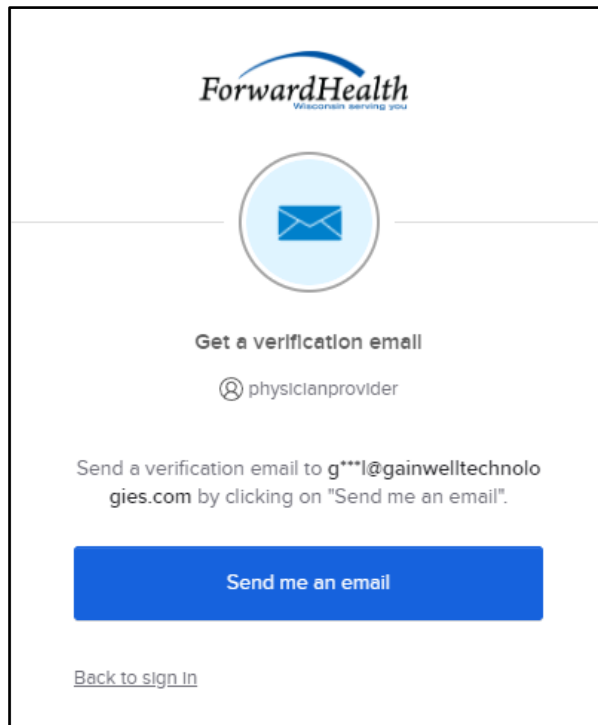
[Verify with something else](#)

[Back to sign in](#)

**Figure 30** Verify With Your Phone Box

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

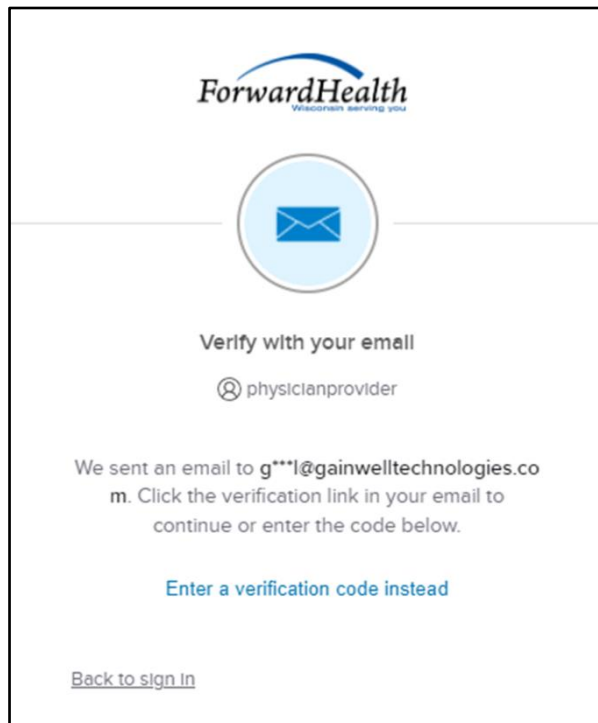
A Get a verification email box will be displayed.



**Figure 31** Get A Verification Email Box

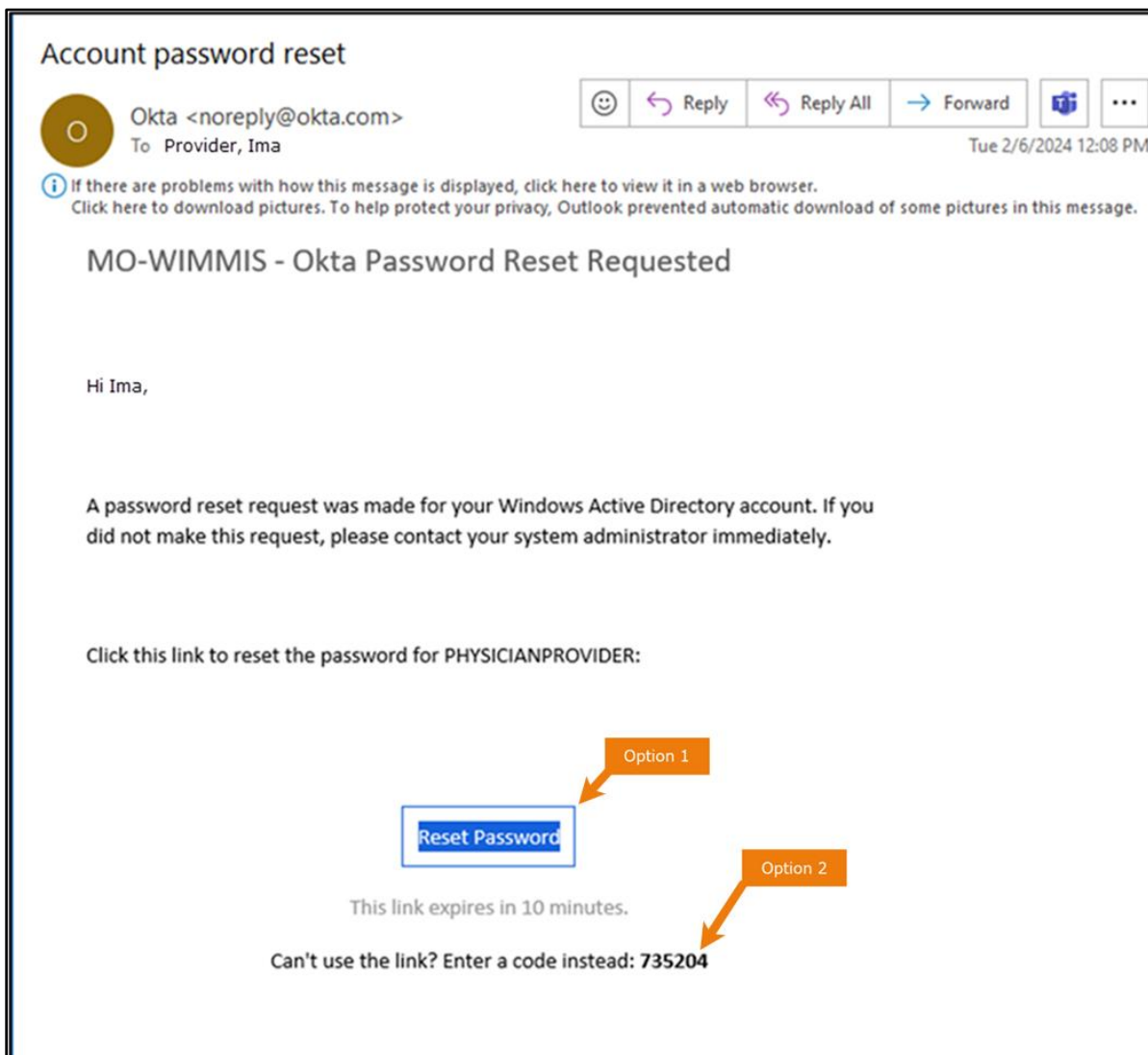
- e. Click **Send me an email**.

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



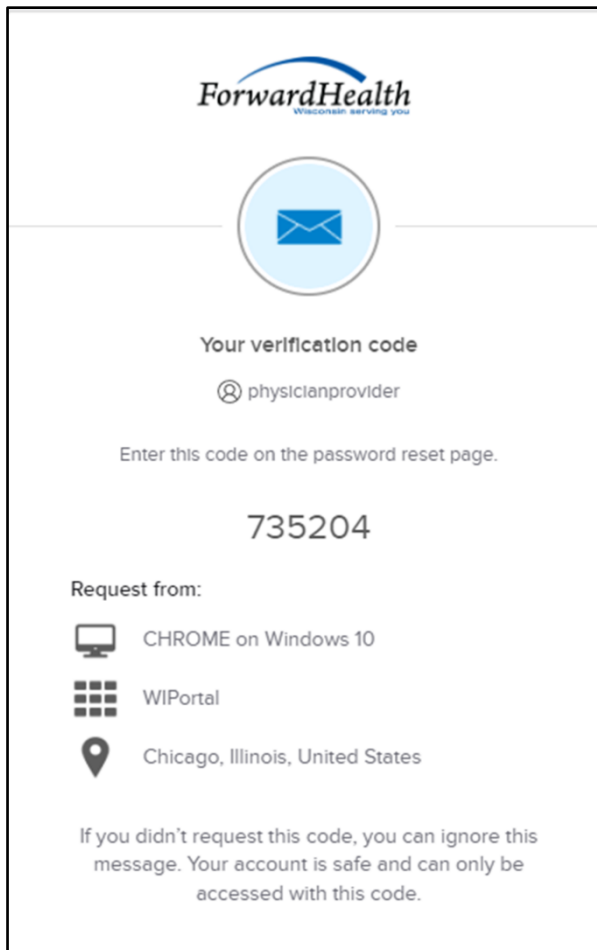
**Figure 32** Verify With Your Email Box

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



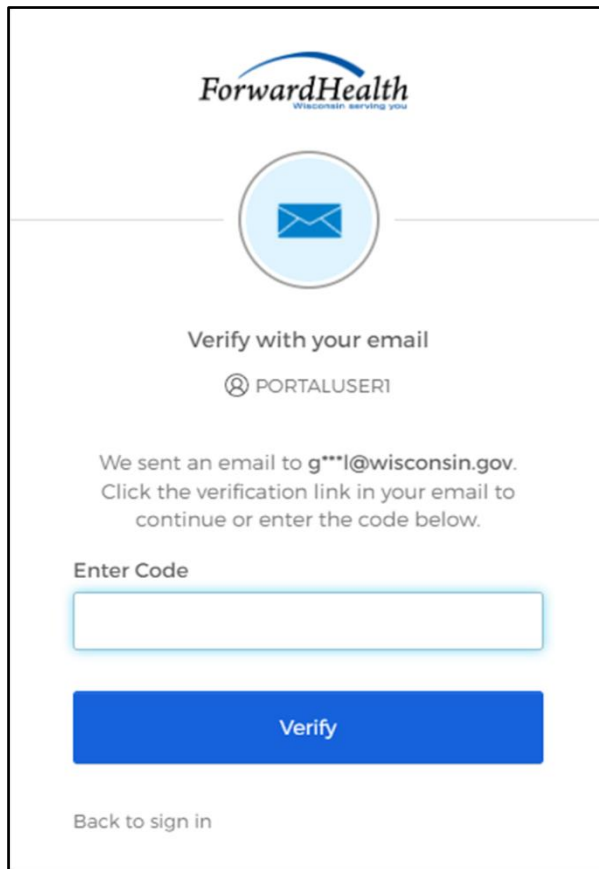
**Figure 33** Account Password Reset Email

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 34** 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.

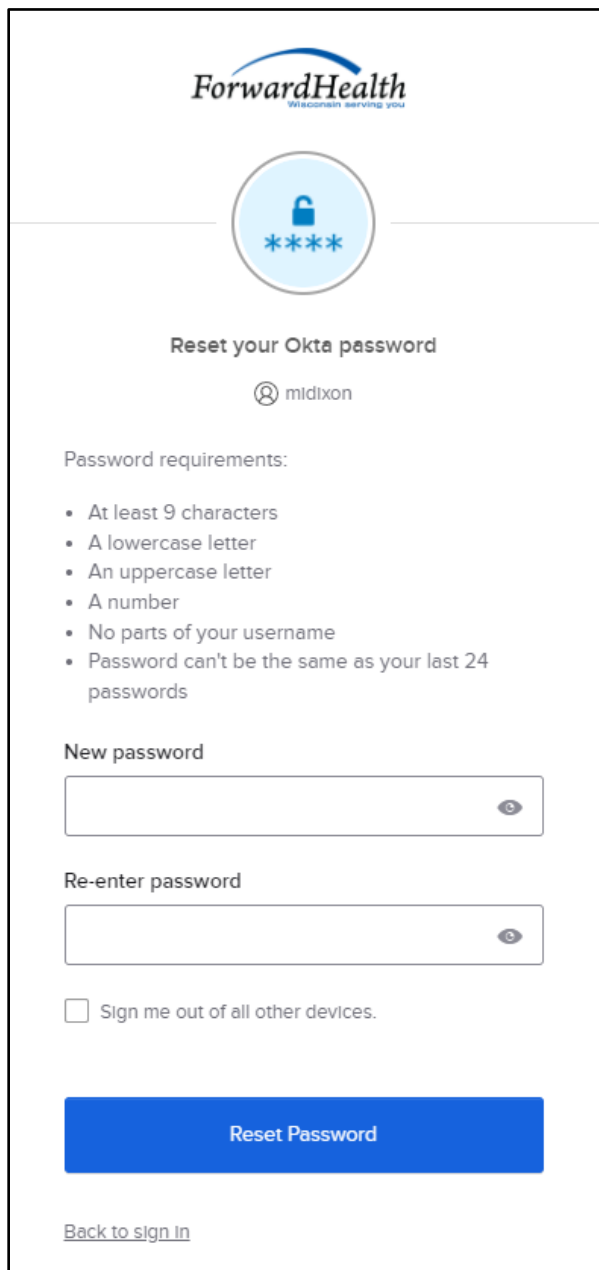
Enter Code

**Verify**

[Back to sign in](#)

**Figure 35** 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 blue padlock and four asterisks. The main heading is 'Reset your Okta password', followed by the user's email 'midixon'. A section titled 'Password requirements:' lists the following rules: at least 9 characters, a lowercase letter, an uppercase letter, a number, no parts of the username, and the password cannot be the same as the last 24 passwords. There are two input fields: 'New password' and 'Re-enter password', each with a toggle icon for password visibility. Below these fields is a checkbox labeled 'Sign me out of all other devices.' At the bottom is a large blue button labeled 'Reset Password' and a link labeled 'Back to sign in'.

**Figure 36** 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.

The screenshot displays the ForwardHealth Provider Portal. At the top, there is a navigation bar with links for Home, Search, Providers, Enrollment, Max Fee Home, Account, Contact Information, Online Handbooks, Site Map, and iC Functionality. Below the navigation bar, a message states "You are logged in with Provider ID: 000000000". The main content area is divided into several sections:

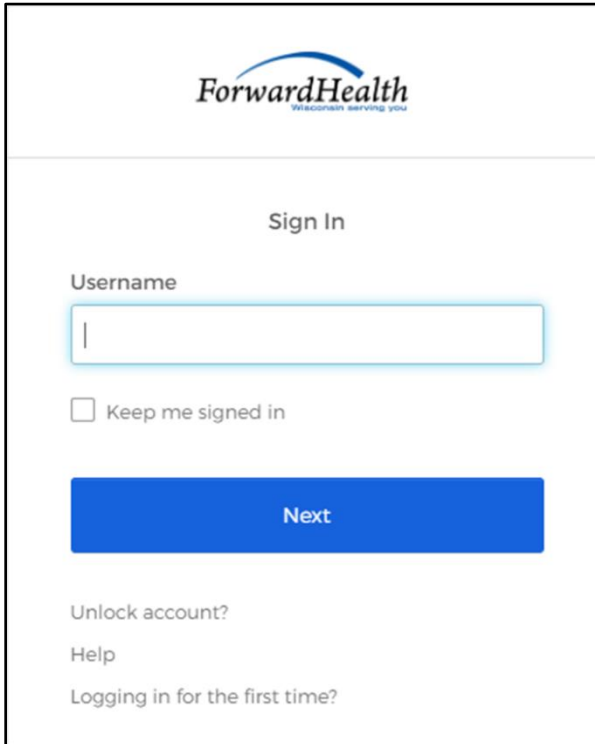
- What's New:** A section with a magnifying glass icon and a text box stating: "Providers can improve efficiency while reducing overhead and paperwork by using real-time applications available on the new ForwardHealth Portal. Submission and tracking of claims and prior authorization requests and amendments, on-demand access to remittance information, 835 trading partner designation, and instant access to the most current ForwardHealth information is now available." Below this, there are three bullet points:
  - New Rate Reform Part 3 Ideas/Recommendations Requested.
  - Incentive Payments. . . Are you Eligible?
  - ForwardHealth System Generated Claim Adjustments
- Messages:** A section with a message icon and a text box stating: "You have no messages." Below this, there is a paragraph of text: "The information contained in this message is confidential and is intended solely for the use of the person or entity named above. This message may contain individually identifiable information that must remain confidential and is protected by state and federal law. If the reader of this message is not the intended recipient, the reader is hereby notified that any dissemination, distribution or reproduction of this message is strictly prohibited. If you have received this message in error, please immediately notify the sender by telephone and destroy the original message. We regret any inconvenience and appreciate your cooperation."
- Home Page:** A section with a list of links:
  - Update User Account
  - Customize Home Page
  - Update Adult LTC Waiver
  - Service(s) or Programs(s)
  - Demographic Maintenance
  - Check My Revalidation Date
  - Revalidate Your Provider
  - Enrollment
  - Check Enrollment
  - Provider Enrollment Upload File
  - Check
  - ForwardHealth E-payment
- Quick Links:** A section with a list of links:
  - Register for E-mail Subscription
  - Provider-specific Resources
  - Request Portal Access
  - Designate 835 Receiver
  - Online Handbooks
  - ForwardHealth Updates
  - Fee Schedules
  - Forms
  - Become a Provider
  - Enrollment Tracking Search
  - Training Listing
  - Explanation of Benefits (EOBs)
  - Upload Audit Documentation
  - Audit Correspondence
- Electronic Visit Verification Links:** A section with a list of links:
  - Add Worker
  - Upload Worker File
  - Manage Workers
  - List of Workers within your agency
  - EVV Portal Functionality User Guide

At the bottom right, there is a contact information box: "Wisconsin EVV Customer Care - 833-931-2035."

**Figure 37** Secure Portal Page

## 4.3 Unlocking An Account

1. Access the Portal at [forwardhealth.wi.gov/](https://forwardhealth.wi.gov/).
2. Click **Login**. A sign in box will be displayed.

The image shows a web form for signing in to the ForwardHealth portal. At the top is the ForwardHealth logo with the tagline "wisconsin serving you". Below the logo is the heading "Sign In". There is a text input field labeled "Username" with a cursor inside. Below the input field is a checkbox labeled "Keep me signed in". A large blue button labeled "Next" is positioned below the checkbox. At the bottom of the form, there are three links: "Unlock account?", "Help", and "Logging in for the first time?".

ForwardHealth  
wisconsin serving you

Sign In

Username

☐ Keep me signed in

Next

Unlock account?

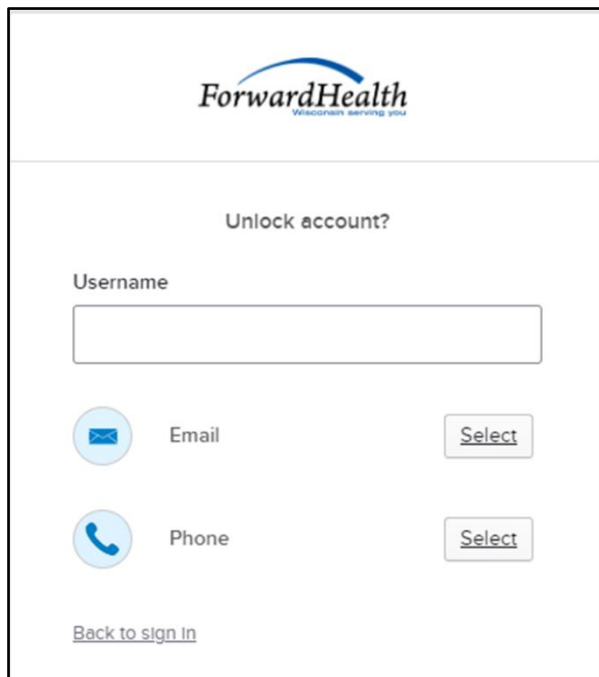
Help

Logging in for the first time?

**Figure 38** Sign In Box

3. Click **Unlock account?**

An Unlock account box will be displayed.

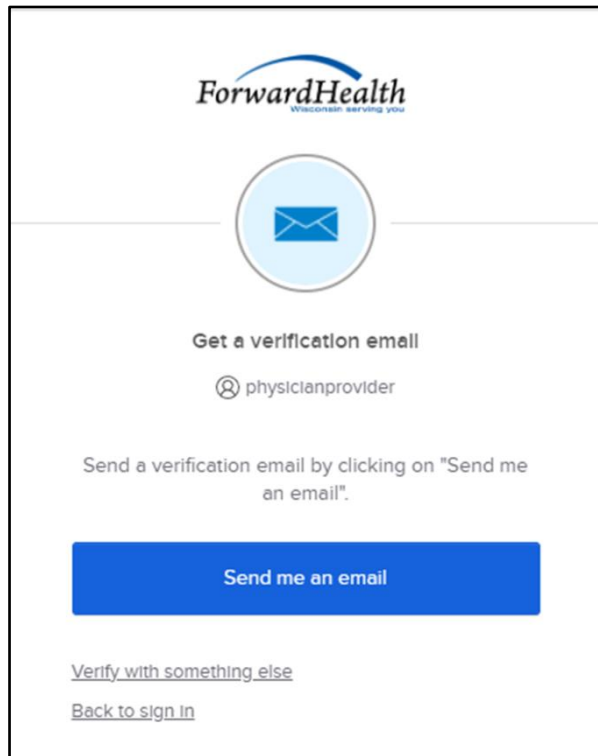


The screenshot shows a web form titled "ForwardHealth" with the tagline "Wisconsin serving you". Below the header, the text "Unlock account?" is centered. The form contains a "Username" label followed by a text input field. Below the input field, there are two options: "Email" and "Phone". Each option is preceded by a circular icon (an envelope for Email and a telephone handset for Phone) and followed by a "Select" button. At the bottom left of the form, there is a link that says "Back to sign in".

**Figure 39** Unlock Account Box

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

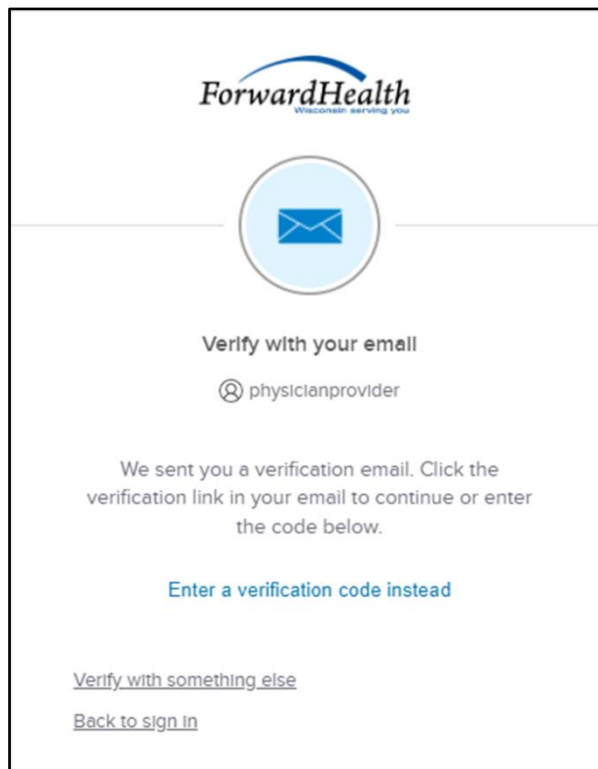
- If the user clicks **Select** for email:
  - a. A Get a verification email box will be displayed.



**Figure 40** Get a Verification Email Box

- 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.

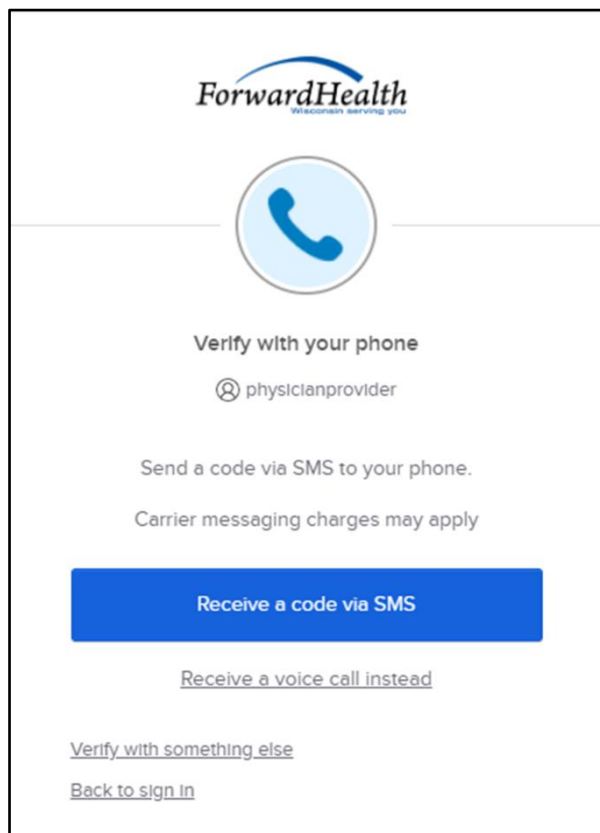
A verify with your email box will be displayed and an email will be sent.



**Figure 41** Verify With Your Email Box

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

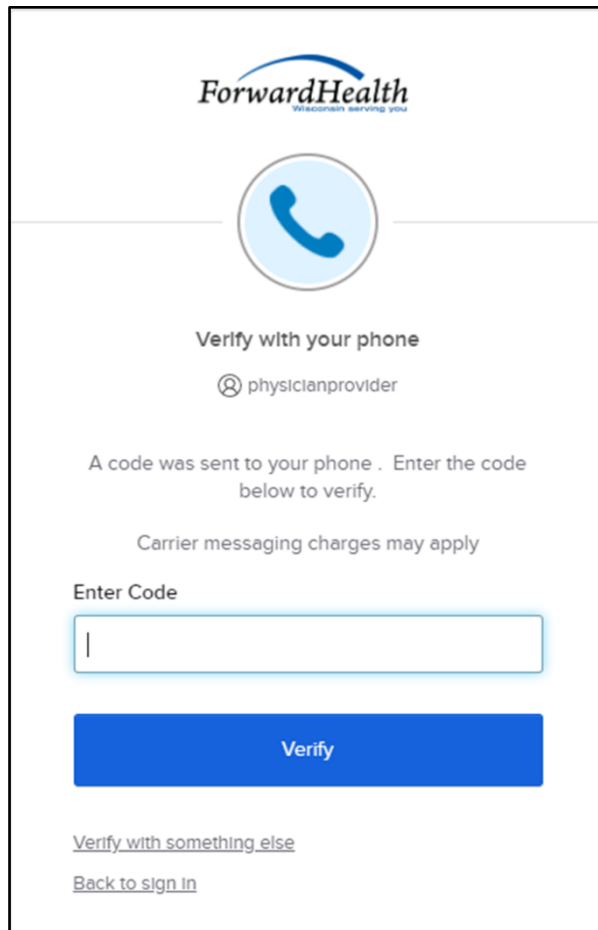
- If the user clicks **Select** for phone:
  - a. A verify with your phone box will be displayed.




**Figure 42** 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**

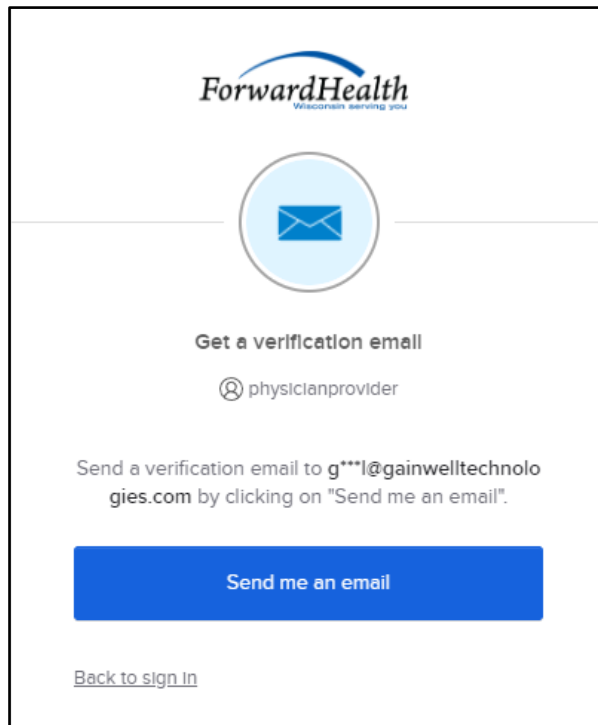
[Verify with something else](#)

[Back to sign in](#)

**Figure 43** Verify With Your Phone Box

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

A Get a verification email box will be displayed.

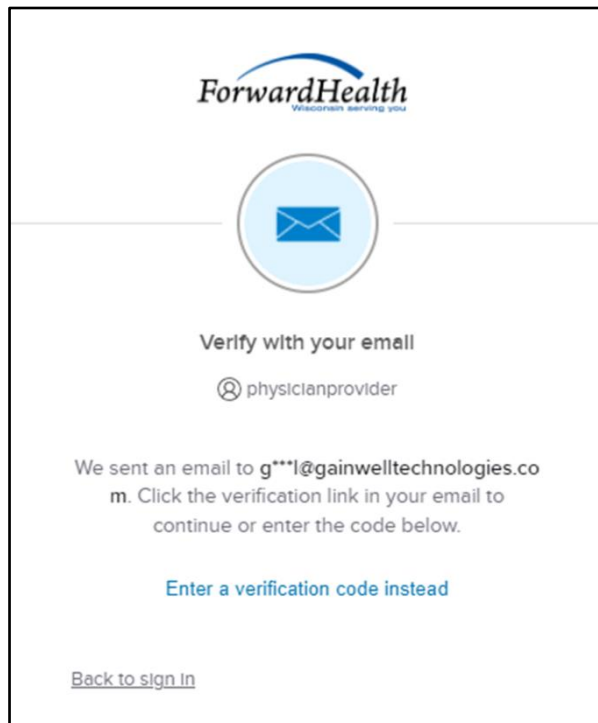


**Figure 44** Get a Verification Email Box

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

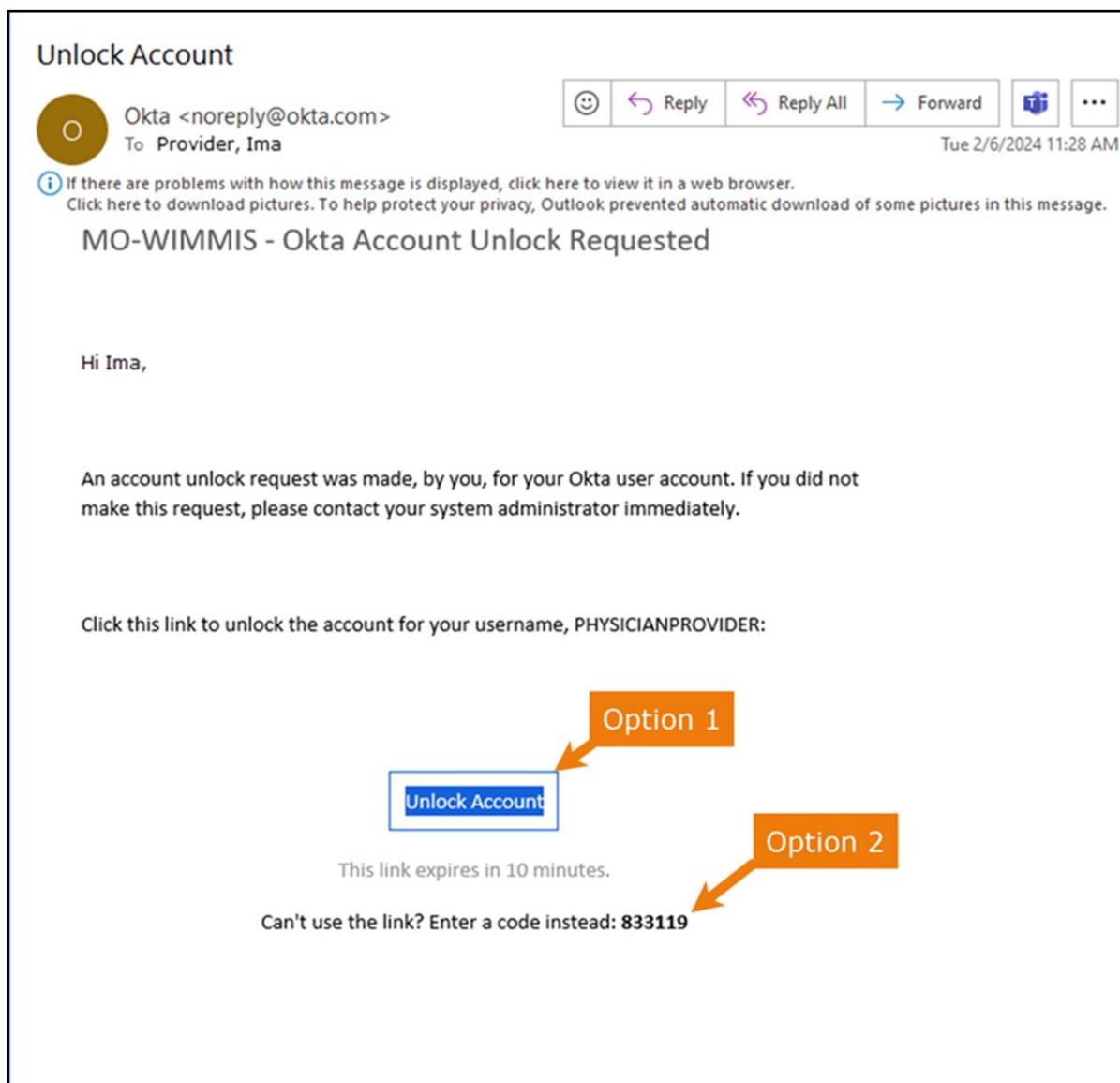


A Verify with your email box will be displayed and an email will be sent.



**Figure 45** Verify With Your Email Box

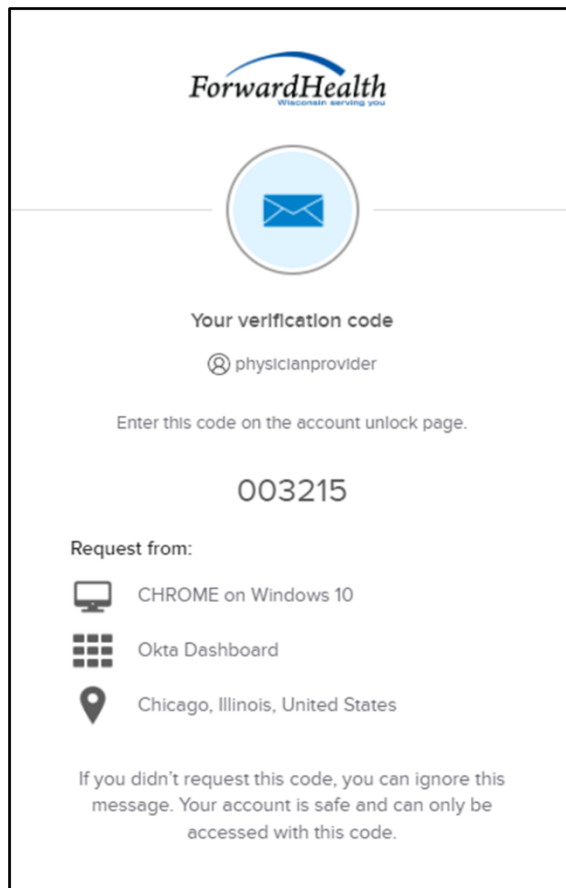
6. The email sent to the user's email address includes an **Unlock Account** link (Option 1) and a verification code (Option 2).



**Figure 46** 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.

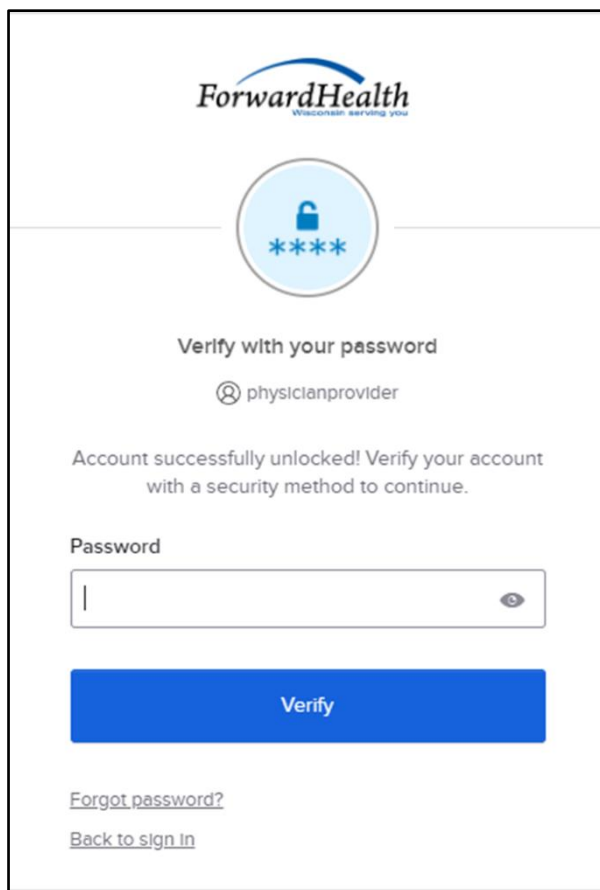
- Clicking the **Unlock Account** link from the email will display a verification code box.



**Figure 47** 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.



ForwardHealth  
Wisconsin serving you

\*\*\*\*

Verify with your password

physicianprovider

Account successfully unlocked! Verify your account with a security method to continue.

Password

Verify

[Forgot password?](#)

[Back to sign in](#)

**Figure 48** Verification Code Box

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

## 4.4 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 the following functions in the secure Portal:
  - a. Home
  - b. Search
  - c. Electronic Visit Secure Home

- d. Account
- e. User Guides
- f. Online Handbook

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 administrative 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. The functionality of the clerk administrative account includes the following:
  - a. Add Worker
  - b. Upload Worker
  - c. Manage Worker
  - d. List of Workers Within Your Agency
  - e. EVV Demographic Maintenance
  - f. EVV Portal User Guide
- *Clerk 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. Clerk accounts can also delete and manage clerk accounts under their account security.

## 5 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 by the administrator or clerk administrator.

**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.

**Clerk Maintenance Search**

**Search Criteria**

Username

First Name

Last Name

Email Address

**Search**

**Clear**

**Search Results**

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

**Selected Clerk**

Username

Contact First Name

Contact Last Name

Telephone Number  Ext.

E-Mail

**Remove Clerk**

**Reset Password**

**Add Clerk**

**Cancel**

**Figure 49** 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.

## 5.1 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.

**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\*

Confirm E-Mail\*

Password\*

Confirm Password\*

**Clerk Roles**

Available Roles

- 835 Designation
- Audit Corr Clerk
- Claim Submission
- Claims - View Only
- Demographic Maint
- EFT
- EHR Incentive
- Eligibility
- Express Enrollment
- HealthCheck

Assigned Roles

☐ Clerk Administrator

Previous Submit Cancel

**Figure 50** 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 telephone 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 Username field. The User Name Search box will be displayed.

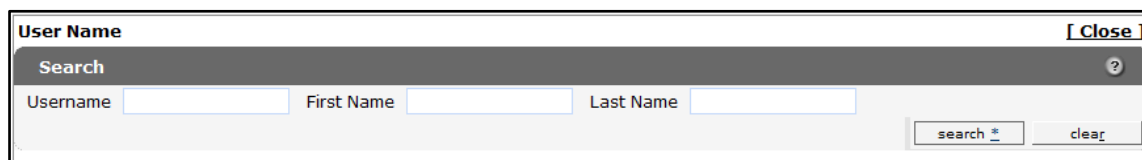
A screenshot of the 'User Name' search box. It has a title bar 'User Name' with a '[ Close ]' button. Below the title bar is a 'Search' section with a question mark icon. The search section contains three input fields: 'Username', 'First Name', and 'Last Name'. To the right of these fields are two buttons: 'search \*' and 'clear'.

Figure 51 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.

A screenshot of the 'User Name' search box showing search results. The title bar is 'User Name' with a '[ Close ]' button. Below the title bar is a 'Search' section with a question mark icon. The search section contains three input fields: 'Username', 'First Name', and 'Last Name'. The 'Last Name' field contains the text 'SMITH'. To the right of these fields are two buttons: 'search \*' and 'clear'. Below the search section is a 'Search Results' section. It contains a table with three columns: 'User Name', 'First Name', and 'Last Name'. The table has one row of results: 'SHAWN99', 'Shawn', and 'Smith'.

Figure 52 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.

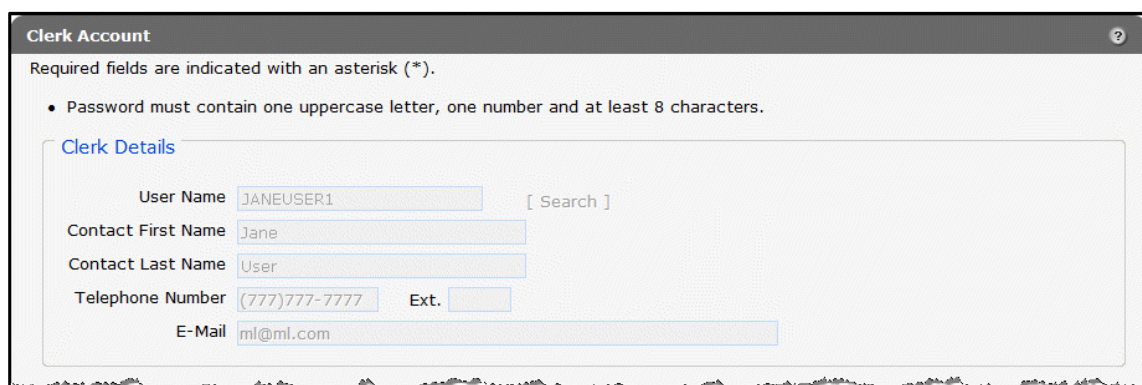
A screenshot of the 'Clerk Account' panel. The title bar is 'Clerk Account' with a question mark icon. Below the title bar is a message: 'Required fields are indicated with an asterisk (\*).' followed by a bullet point: 'Password must contain one uppercase letter, one number and at least 8 characters.' Below this is a 'Clerk Details' section. It contains several input fields: 'User Name' (JANEUSER1), 'Contact First Name' (Jane), 'Contact Last Name' (User), 'Telephone Number' ((777)777-7777), 'Ext.' ( ), and 'E-Mail' (ml@ml.com). There is a '[ Search ]' button next to the 'User Name' field.

Figure 53 Clerk Account Information Auto-populated on Clerk Account Panel

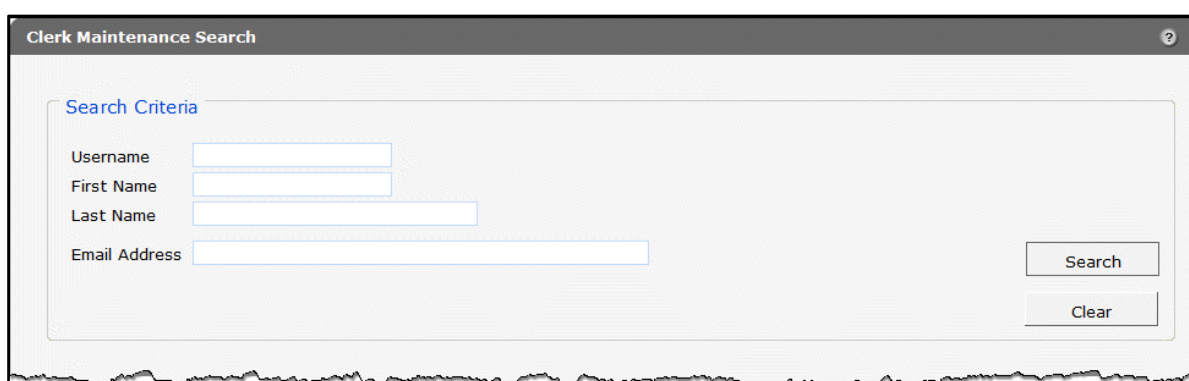
2. Proceed to one of the following sections once clerk details have been entered or populated:

- Step 2 of [Section 5.3 Add a Role to a Clerk](#) of this guide
- Step 1 of [Section 5.5 Assign a Clerk Administrator](#) of this guide

## 5.2 Search for a Clerk

The Clerk Maintenance Search panel allows a user to select an existing clerk to associate to their agency.

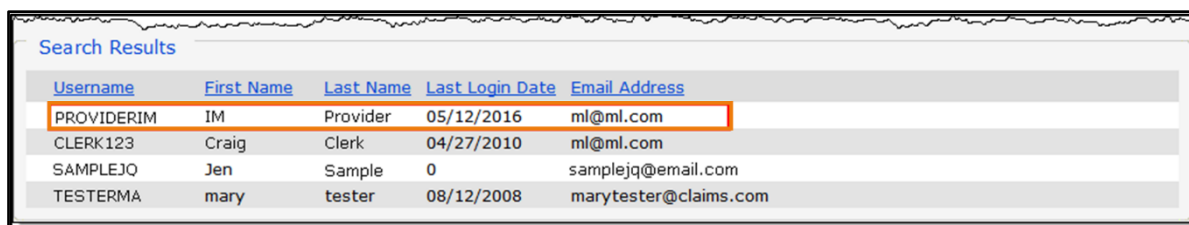
1. Enter information for the clerk in any combination in the Search Criteria section.  
Alternatively, leave the fields blank to bring up a list of all clerks associated with the provider organization.



The screenshot shows a web interface titled "Clerk Maintenance Search". Inside, there is a section labeled "Search Criteria" with four text input fields: "Username", "First Name", "Last Name", and "Email Address". To the right of these fields are two buttons: "Search" and "Clear".

Figure 54 Search Criteria Section

2. Click **Search**.
3. Click the row containing the clerk's name in the "Search Results" section.



The screenshot shows a table titled "Search Results" with the following data:

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 55 Search Results Section

The clerk's information will populate in the "Selected Clerk" section.

The screenshot displays a web interface with two main sections. The top section, titled "Search Results", contains a table with five columns: Username, First Name, Last Name, Last Login Date, and Email Address. The bottom section, titled "Selected Clerk", contains a form with fields for Username, Contact First Name, Contact Last Name, Telephone Number (with a separate Ext. field), and E-Mail. The form fields are populated with the data from the first row of the search results table. At the bottom of the "Selected Clerk" section are two buttons: "Remove Clerk" and "Reset Password". At the bottom of the entire interface are three buttons: "Next", "Add Clerk", and "Cancel".

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 56** Search Results and Selected Clerk Sections

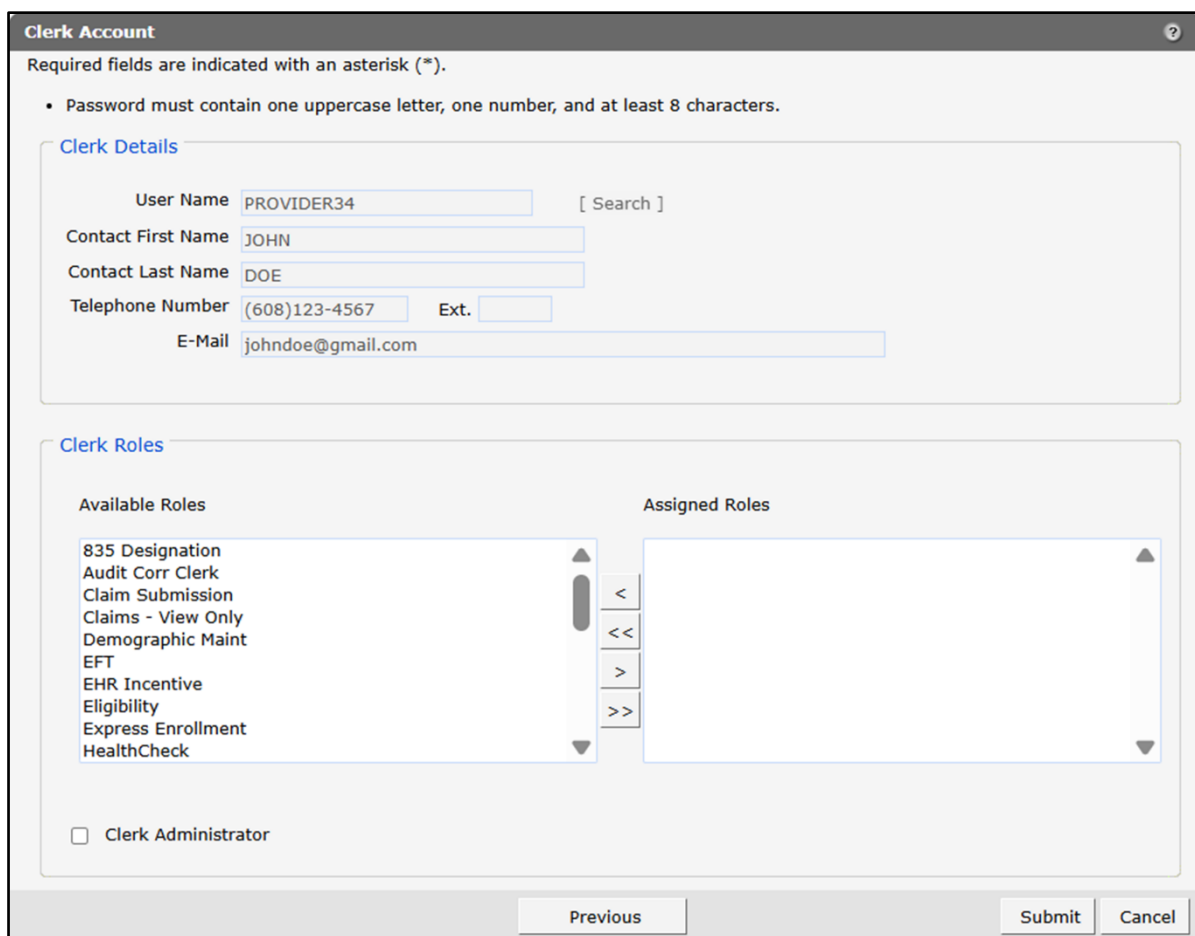
4. Proceed to one of the following sections of this guide once a clerk has been selected:

- [Section 5.3 Add a Role to a Clerk](#)
- [Section 5.4 Remove a Role From a Clerk](#)
- [Section 5.5 Assign a Clerk Administrator](#)
- [Section 5.6 Reset a Clerk's Password](#)
- [Section 5.7 Delete a Clerk Account](#)

## 5.3 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**

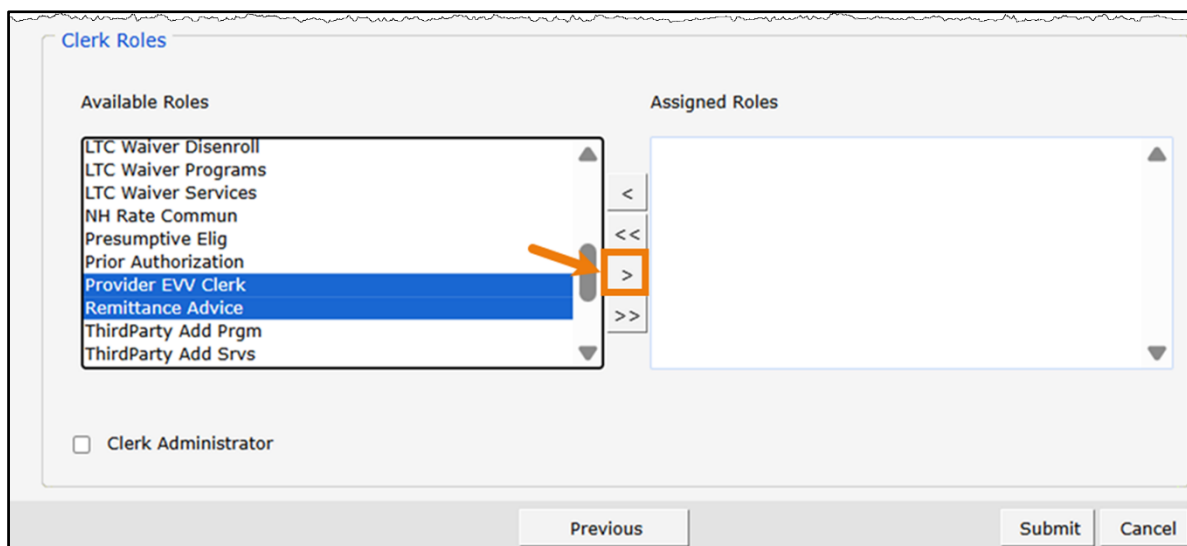
Available Roles		Assigned Roles
835 Designation	<div>&lt;</div> <div>&lt;&lt;</div> <div>&gt;</div> <div>&gt;&gt;</div>	
Audit Corr Clerk		
Claim Submission		
Claims - View Only		
Demographic Maint		
EFT		
EHR Incentive		
Eligibility		
Express Enrollment		
HealthCheck		

☐ Clerk Administrator

Previous Submit Cancel

**Figure 57** Clerk Account Panel

2. 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. Note: The Provider EVV Clerk role is for EVV worker assignment. In addition to the EVV role, there are other long-term care waiver roles available to assign as necessary.



**Clerk Roles**

Available Roles

- LTC Waiver Disenroll
- LTC Waiver Programs
- LTC Waiver Services
- NH Rate Commun
- Presumptive Elig
- Prior Authorization
- Provider EVV Clerk
- Remittance Advice
- ThirdParty Add Prgm
- ThirdParty Add Svcs

Assigned Roles

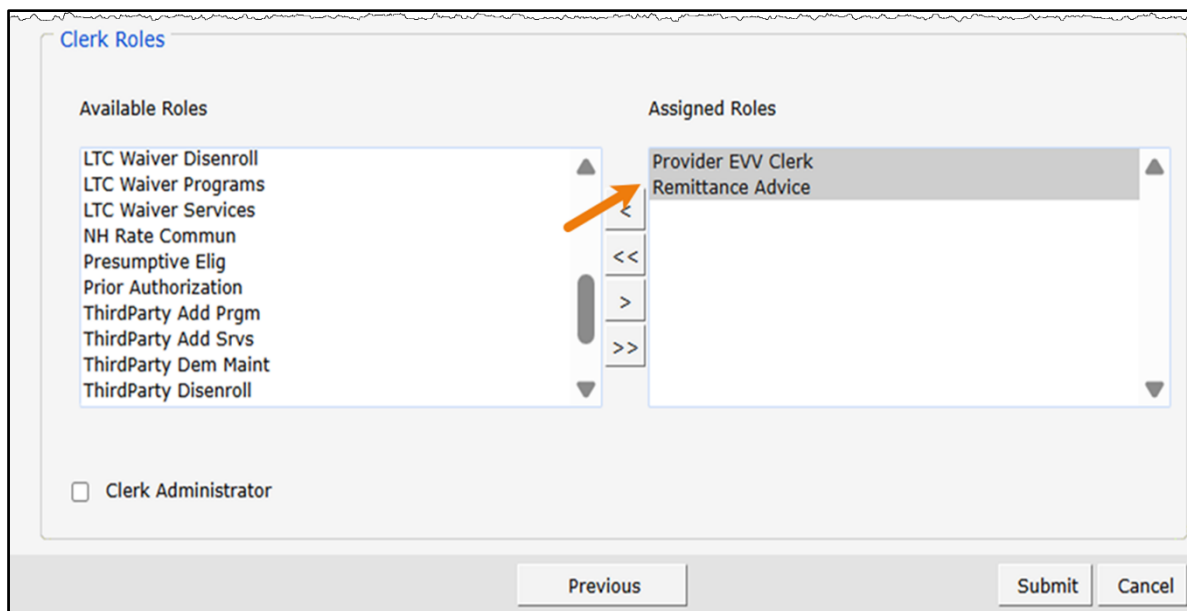
☐ Clerk Administrator

Previous Submit Cancel

**Figure 58** Clerk Roles Section With Available Roles

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

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



**Clerk Roles**

Available Roles

- LTC Waiver Disenroll
- LTC Waiver Programs
- LTC Waiver Services
- NH Rate Commun
- Presumptive Elig
- Prior Authorization
- ThirdParty Add Prgm
- ThirdParty Add Svcs
- ThirdParty Dem Maint
- ThirdParty Disenroll

Assigned Roles

- Provider EVV Clerk
- Remittance Advice

☐ Clerk Administrator

Previous Submit Cancel

**Figure 59** Clerk Roles Section With Assigned Roles

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



**Figure 60** User Successfully Updated Message

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

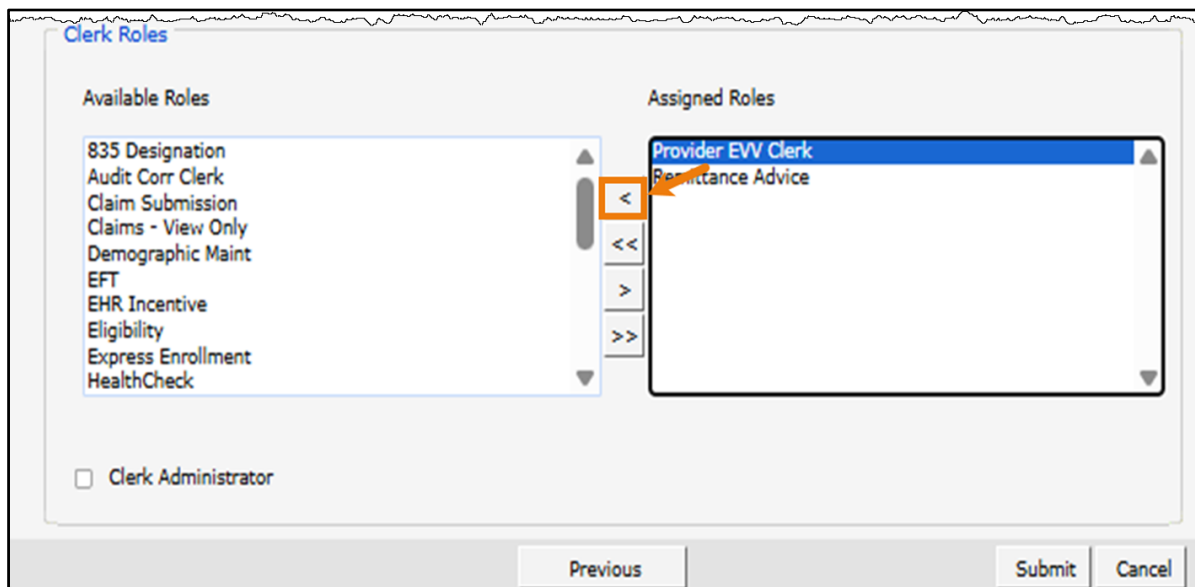
## 5.4 Remove a Role From a Clerk

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

The screenshot shows a "Clerk Account" window. At the top, it says "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." Below this is the "Clerk Details" section with fields for User Name (PROVIDER34), Contact First Name (JOHN), Contact Last Name (DOE), Telephone Number ((608)123-4567), Ext., and E-Mail (johndoe@gmail.com). There is a "[ Search ]" button next to the User Name field. The "Clerk Roles" section has two lists: "Available Roles" (835 Designation, Audit Corr Clerk, Claim Submission, Claims - View Only, Demographic Maint, EFT, EHR Incentive, Eligibility, Express Enrollment, HealthCheck) and "Assigned Roles" (Provider EVV Clerk, Remittance Advice). Between the lists are buttons: "<", "<<", ">", and ">>". At the bottom left of the roles section is a checkbox for "Clerk Administrator". At the bottom of the window are "Previous", "Submit", and "Cancel" buttons.

**Figure 61** Clerk Account Panel

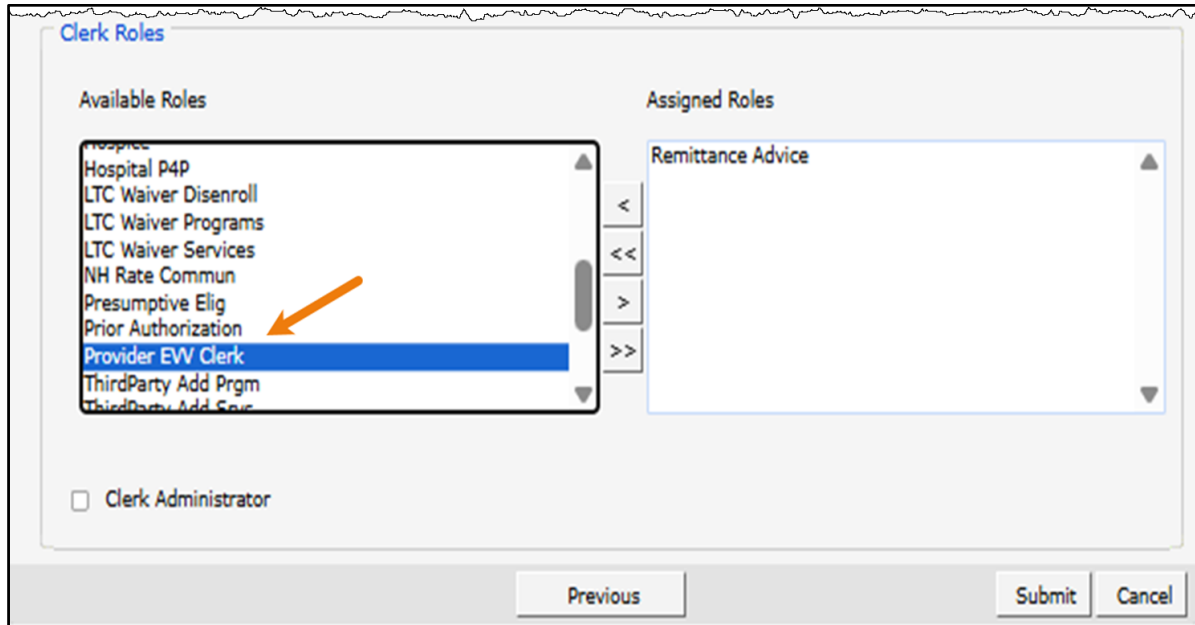
2. In the “Clerk Roles” section, select a role(s) from the Assigned Roles box. To select more than one row, hold down the Ctrl key and click all applicable roles.



**Figure 62** Clerk Roles Section With Assigned Roles

3. 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 63** Clerk Roles Section With Role Removed

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



**Figure 64** Confirmation Message

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

## 5.5 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.

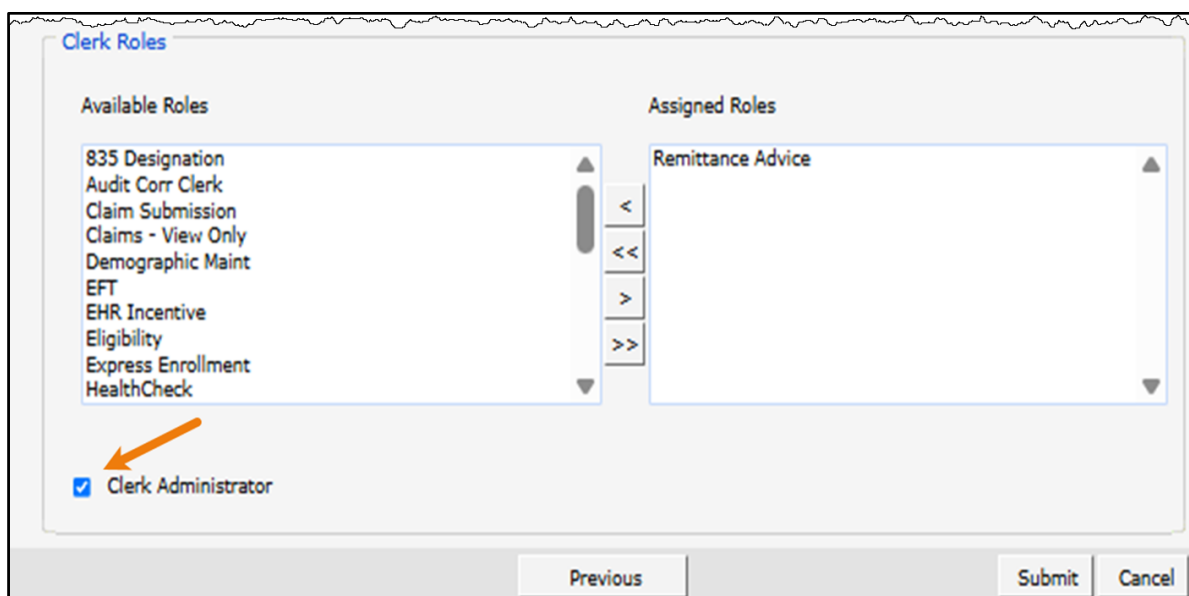
- Click **Next**. The Clerk Account panel will be displayed.

The "Clerk Account" panel is a web form with a title bar and a help icon. It contains two main sections: "Clerk Details" and "Clerk Roles".  
**Clerk Details:** This section has a heading and a list of required fields marked with asterisks. A note states: "Password must contain one uppercase letter, one number, and at least 8 characters." The fields include: "User Name" (containing "PROVIDER34" and a "[ Search ]" button), "Contact First Name" (containing "JOHN"), "Contact Last Name" (containing "DOE"), "Telephone Number" (containing "(608)123-4567" and an "Ext." field), and "E-Mail" (containing "johndoe@gmail.com").  
**Clerk Roles:** This section has two columns: "Available Roles" and "Assigned Roles". The "Available Roles" list includes: 835 Designation, Audit Corr Clerk, Claim Submission, Claims - View Only, Demographic Maint, EFT, EHR Incentive, Eligibility, Express Enrollment, and HealthCheck. The "Assigned Roles" list currently contains "Remittance Advice". Between the two lists are four buttons: "<", "<<", ">", and ">>". At the bottom of this section is a checkbox labeled "Clerk Administrator".  
At the bottom of the panel are three buttons: "Previous", "Submit", and "Cancel".

**Figure 65** Clerk Account Panel



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



**Figure 66** Clerk Roles Section With Clerk Administrator Checked

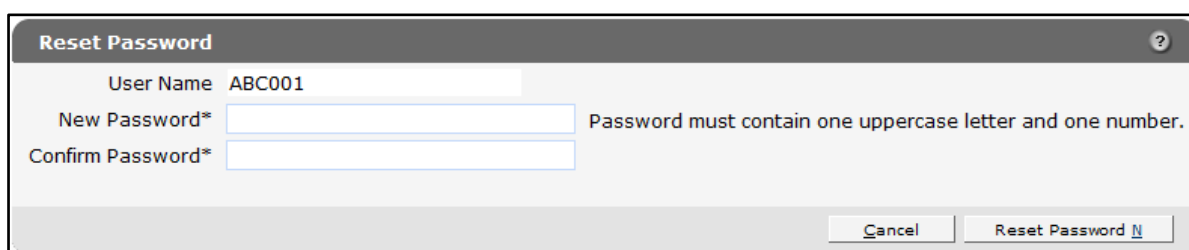
3. Click **Submit**. A confirmation message will be displayed at the top of the page.



**Figure 67** Confirmation Message

## 5.6 Reset a Clerk's Password

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



**Figure 68** Reset Password Page

2. 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.

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

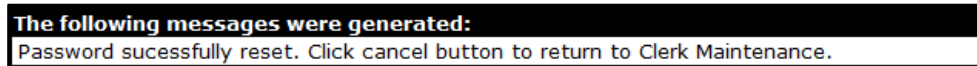


Figure 69 Confirmation Message

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.

## 5.7 Delete a Clerk Account

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

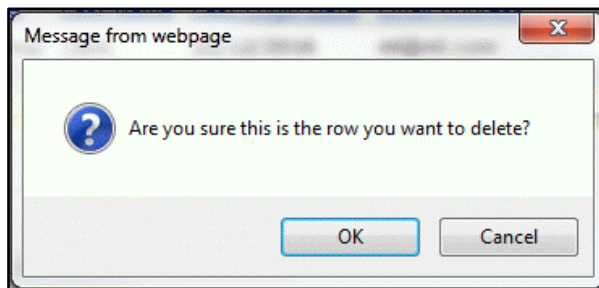


Figure 70 Dialog Box

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

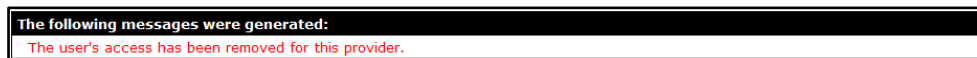


Figure 71 Confirmation Message

## 5.8 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 [forwardhealth.wi.gov/](https://forwardhealth.wi.gov/).

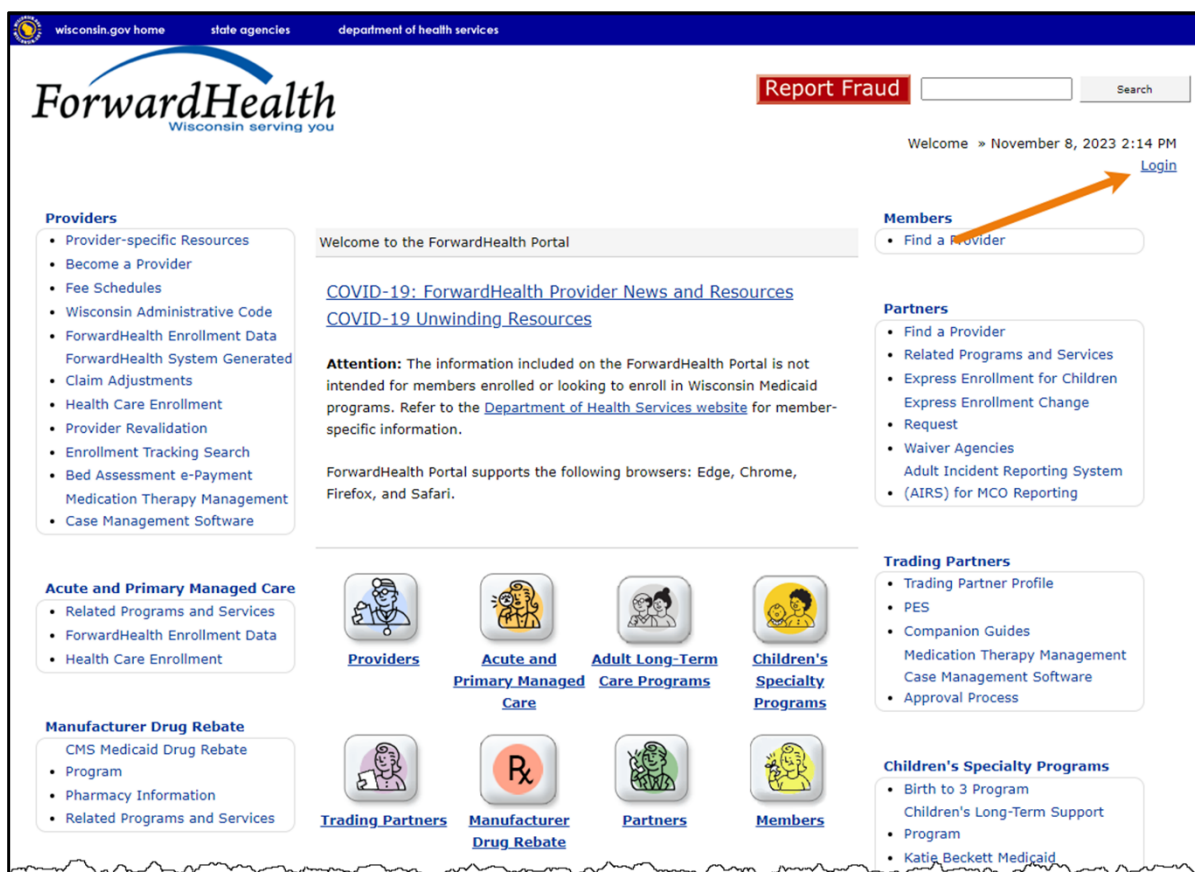
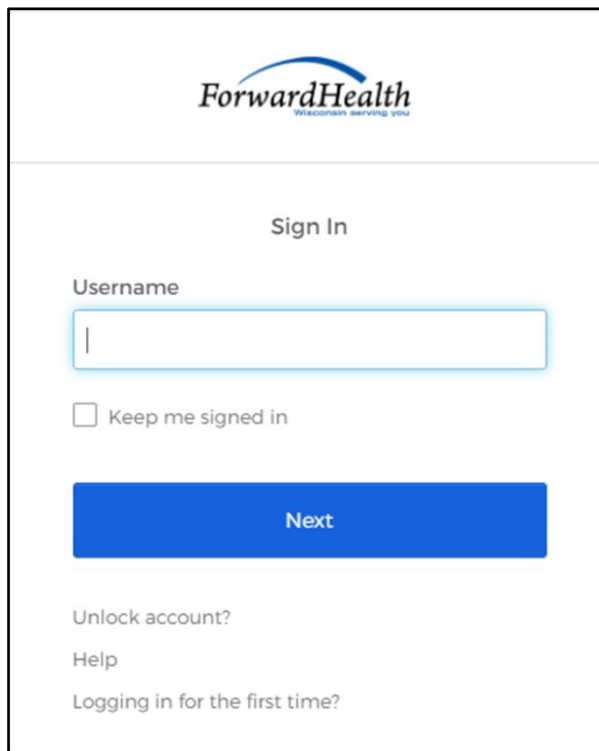


Figure 72 ForwardHealth Portal Page

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

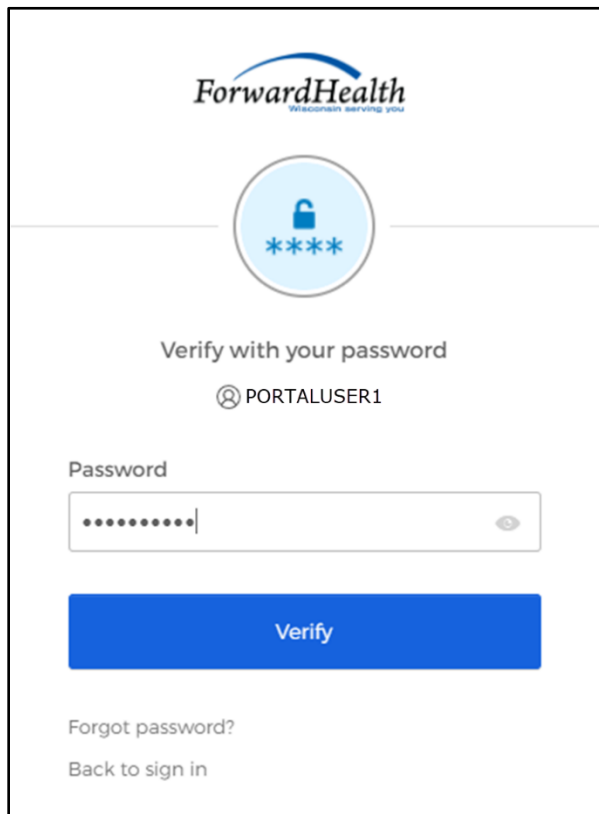


The screenshot shows a web interface for ForwardHealth. At the top is the ForwardHealth logo with the tagline "Wisconsin serving you". Below the logo is a "Sign In" heading. Underneath is a "Username" label followed by a text input field. Below the input field is a checkbox labeled "Keep me signed in". A large 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 73** Sign In Box

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

A Verify with your password box will be displayed.



ForwardHealth  
Mission: serving you

\*\*\*\*

Verify with your password

PORTALUSER1

Password

.....

Verify

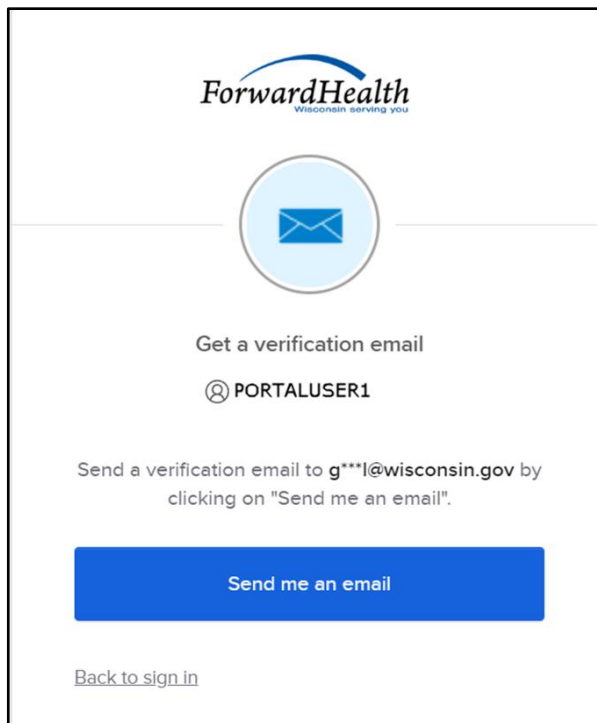
[Forgot password?](#)

[Back to sign in](#)

**Figure 74** Verify With Your Password Box

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

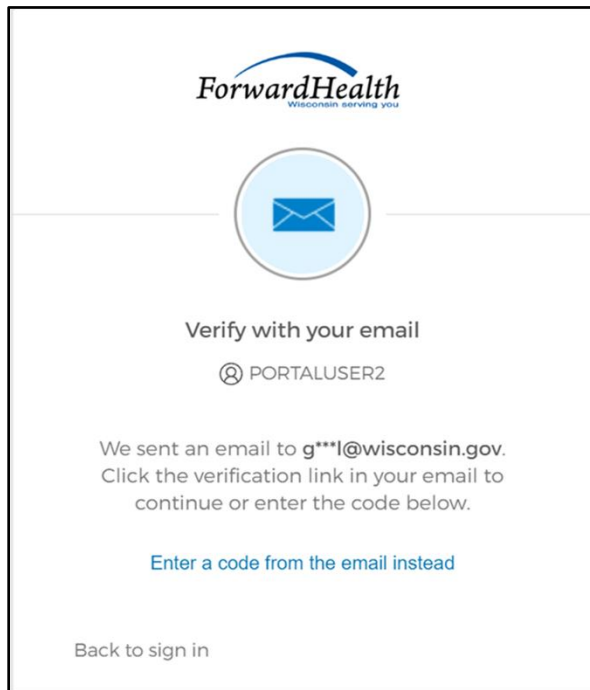
A Get a verification email box will be displayed. Note: If the user's password expires when setting up MFA, a change password box will be displayed, and the user will be prompted to enter and re-enter their new password.



**Figure 75** Get a Verification Email Box

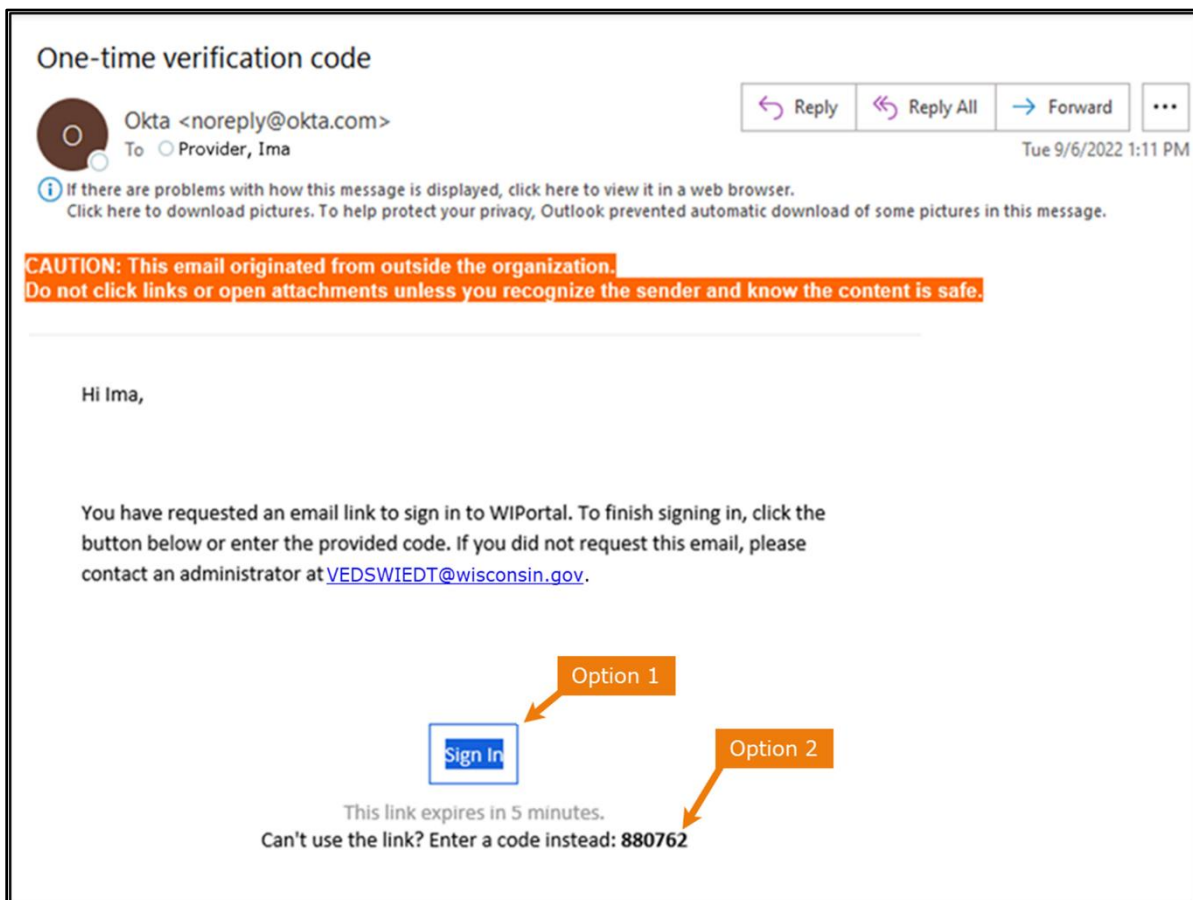
7. Click **Send me an email**.

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



**Figure 76** 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).

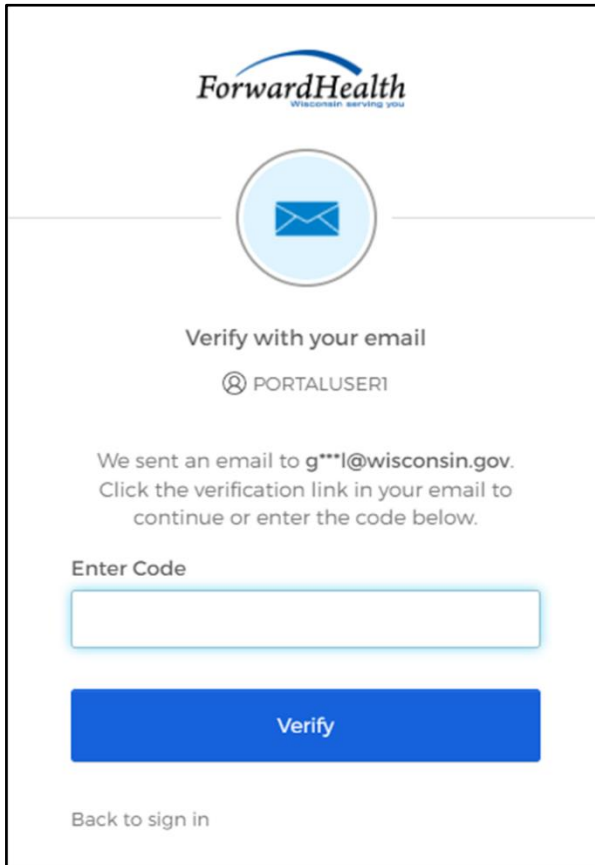


**Figure 77** One-Time Verification Code Email




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.

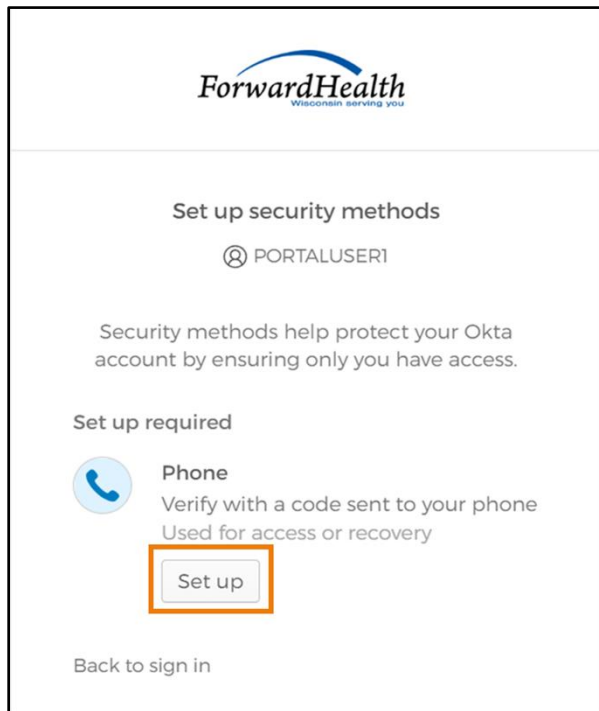
Enter Code

**Verify**

[Back to sign in](#)

**Figure 78** Verify With Your Email Box

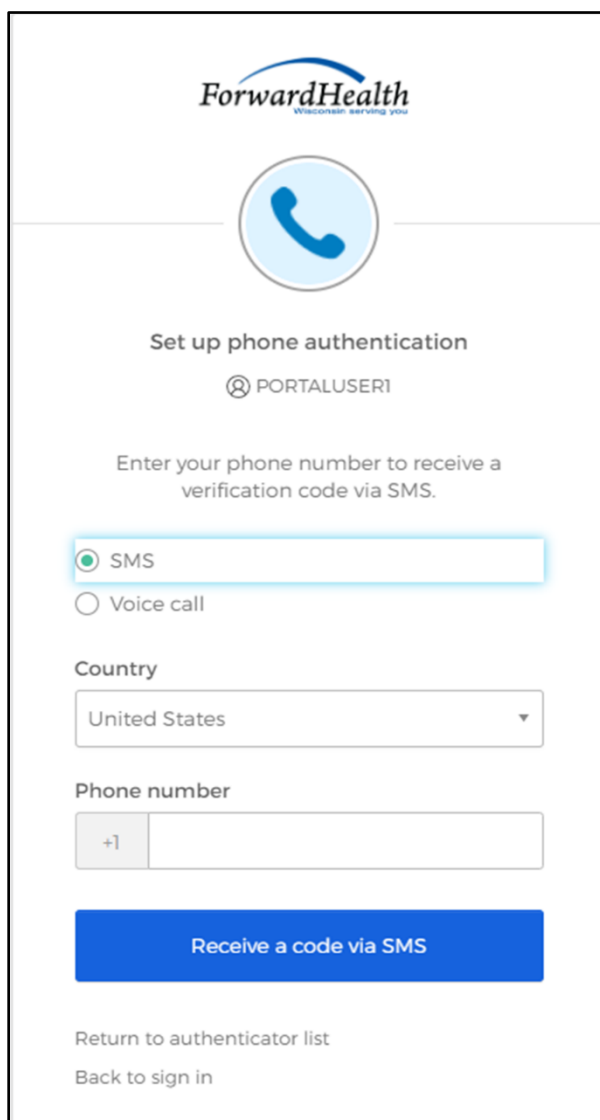
A Set up security methods box will be displayed.




**Figure 79** Set Up Security Methods Box

10. Click **Set up**.

A Set up phone authentication box will be displayed.



**ForwardHealth**  
Wisconsin, serving you



**Set up phone authentication**

PORTALUSER1

Enter your phone number to receive a verification code via SMS.

☒ SMS

☐ Voice call

**Country**

United States ▼

**Phone number**

+1

**Receive a code via SMS**

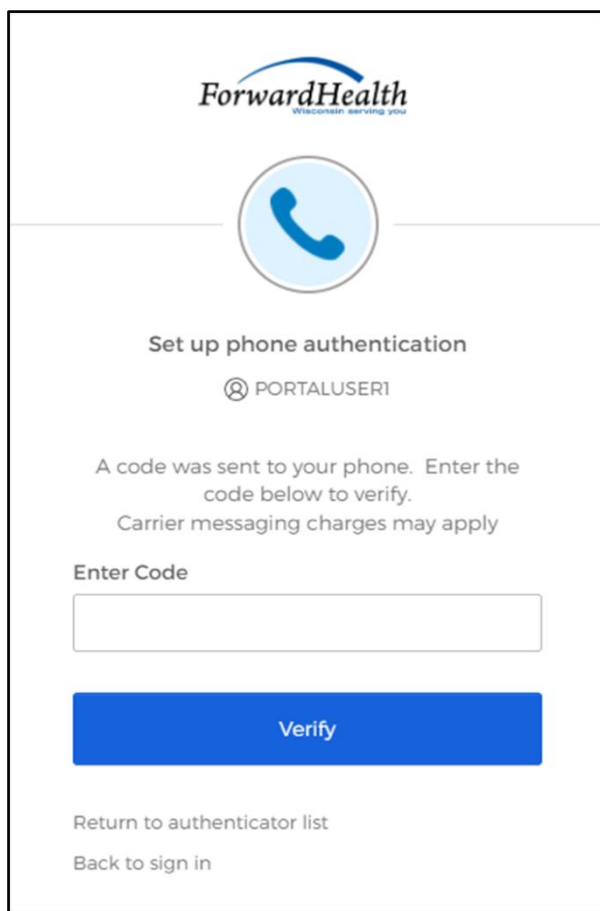
[Return to authenticator list](#)

[Back to sign in](#)


**Figure 80** 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 81** 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.

## 6 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.

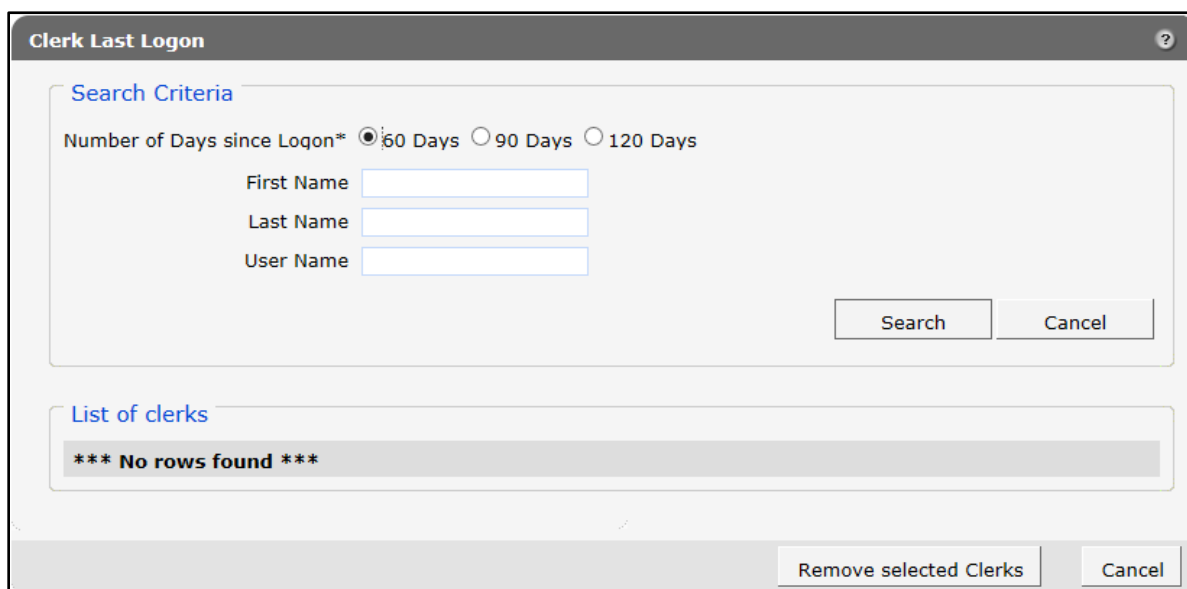


Figure 82 Clerk Maintenance Search Panel

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.

### 6.1 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 login.

**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 83** 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**

Clerk First Name	Clerk Last Name	Clerk User Name	E-Mail	Date Last Logon	Number of days since last logon	Remove From Org
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 84** 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 Portal account page.

# 7 Demographic Maintenance Tool

The demographic maintenance tool on the Portal allows EVV providers to securely, efficiently, and conveniently update provider information such as addresses and tax information.

When an EVV provider updates information using the demographic maintenance tool, in most cases, ForwardHealth immediately updates the provider's information, which allows for more efficient business practices.

1. Access the Portal at [forwardhealth.wi.gov/](https://forwardhealth.wi.gov/).

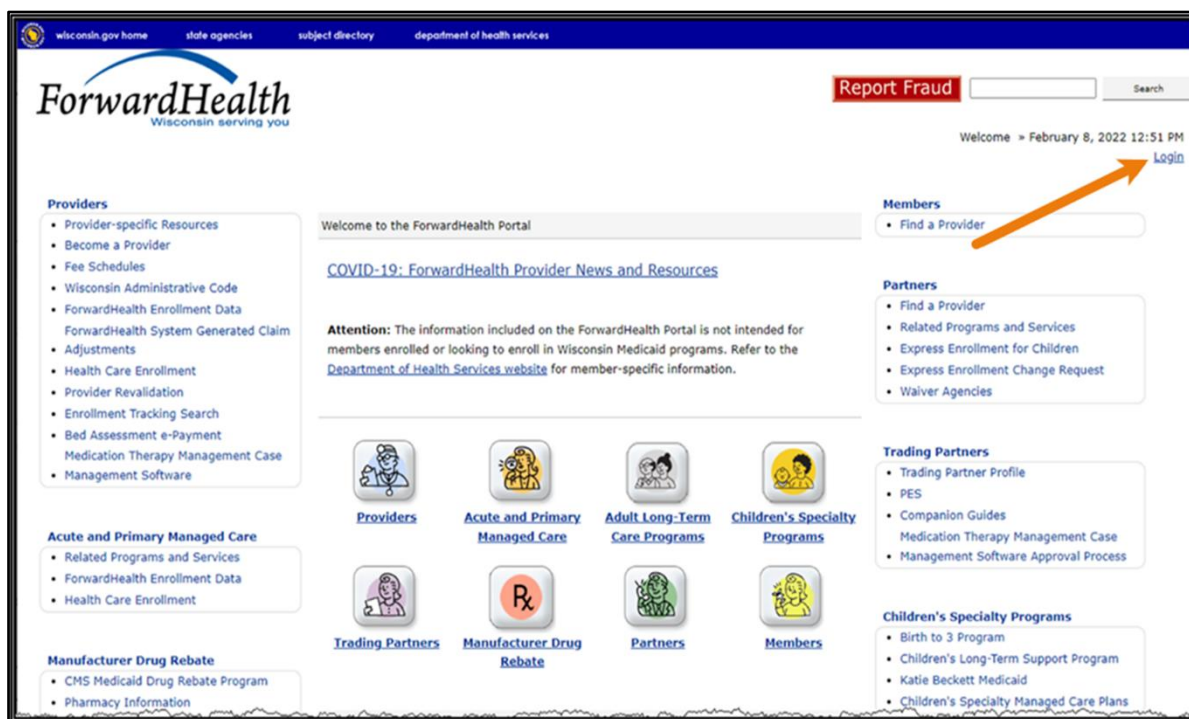
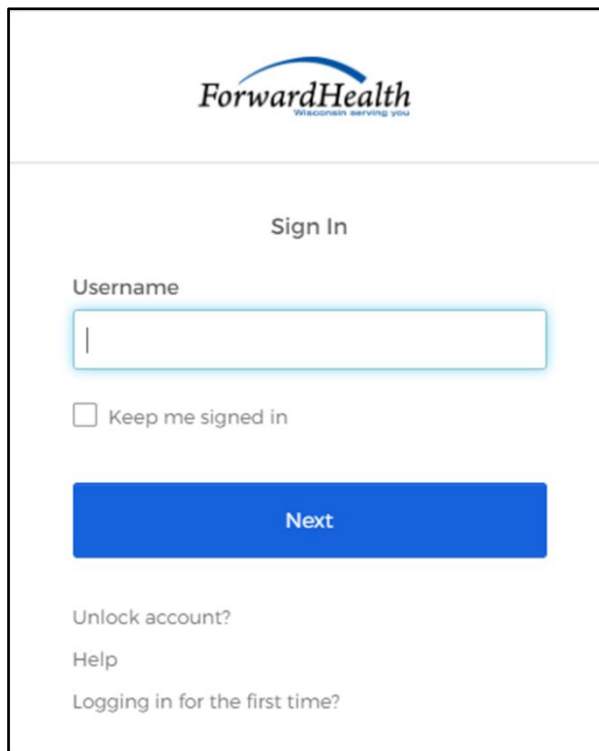


Figure 85 Portal Homepage

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

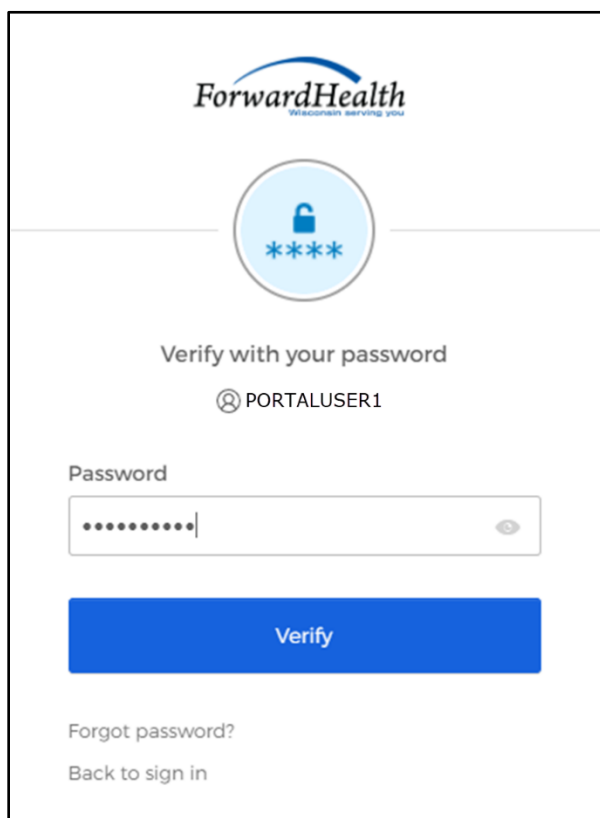
The image shows a 'Sign In' box for ForwardHealth. At the top is the ForwardHealth logo with the tagline 'Wisconsin serving you'. Below the logo is the title 'Sign In'. There is a text input field labeled 'Username' with a blue border. Below the input field is a checkbox labeled 'Keep me signed in'. A large blue button labeled 'Next' is positioned below the checkbox. At the bottom of the box are three links: 'Unlock account?', 'Help', and 'Logging in for the first time?'.

**Figure 86** Sign-In Box

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



A Verify with your password box will be displayed.



**ForwardHealth**  
Mission: serving you

Verify with your password

PORTALUSER1

Password

.....

Verify

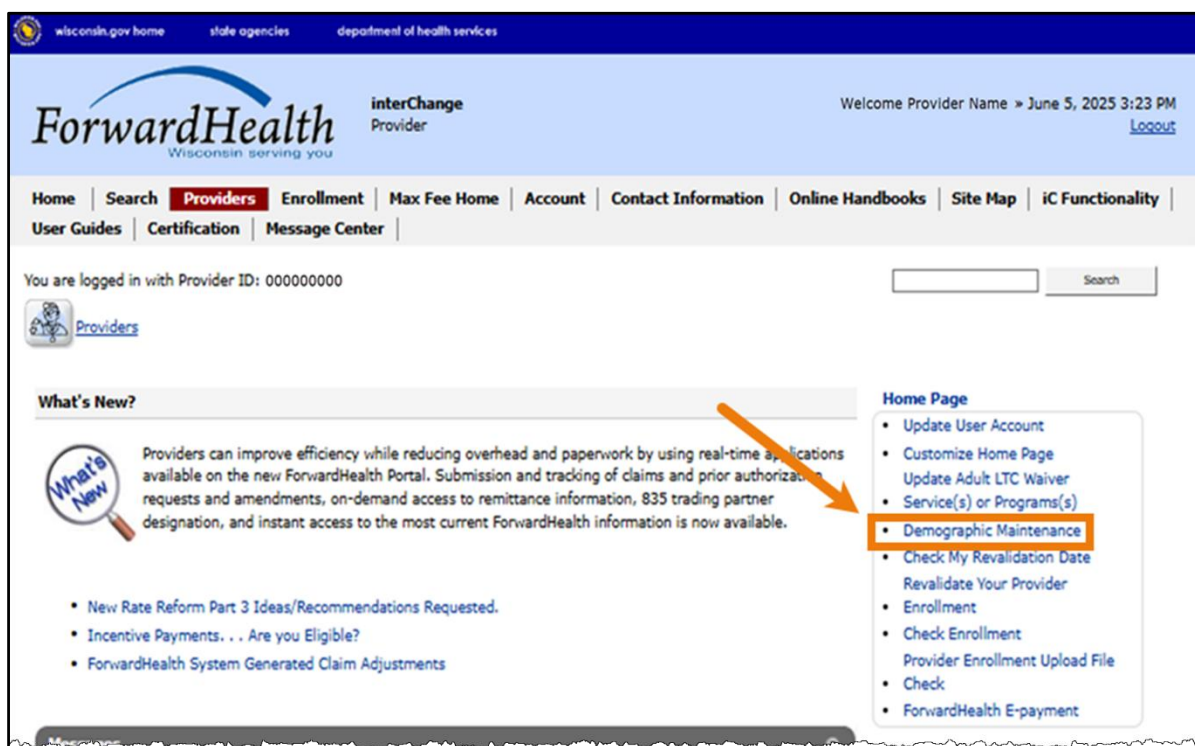
[Forgot password?](#)

[Back to sign in](#)

**Figure 87** Verify With Your Password Box

5. Enter the user's password.

6. Click **Verify**. The secure Provider page will be displayed.



**Figure 88** Secure Provider Page

7. Click **Demographic Maintenance** and follow the instructions in the [ForwardHealth Portal Demographic Maintenance Tool User Guide](#). This user guide includes a chapter with Adult Long-Term Care Waiver Services panels.

## 8 Worker Association

For the purposes of EVV, providers are required to add, or associate, each of their workers who provide personal care, applicable supportive home care, or home health care services for Medicaid members. Providers can use the Portal by using the Add Worker or Upload Worker File links under the Electronic Visit Verification Links section of their secure Provider page of the Portal. Providers may also indicate if a worker is [exempt from EVV requirements](#) if the worker is not required to capture EVV for any of the people they provide services to for the agency. A list of EVV service codes that require EVV in Wisconsin is available on the [DHS website](#). Providers can access the links under the Home Page, Quick Links, and Electronic Visit Verification sections.

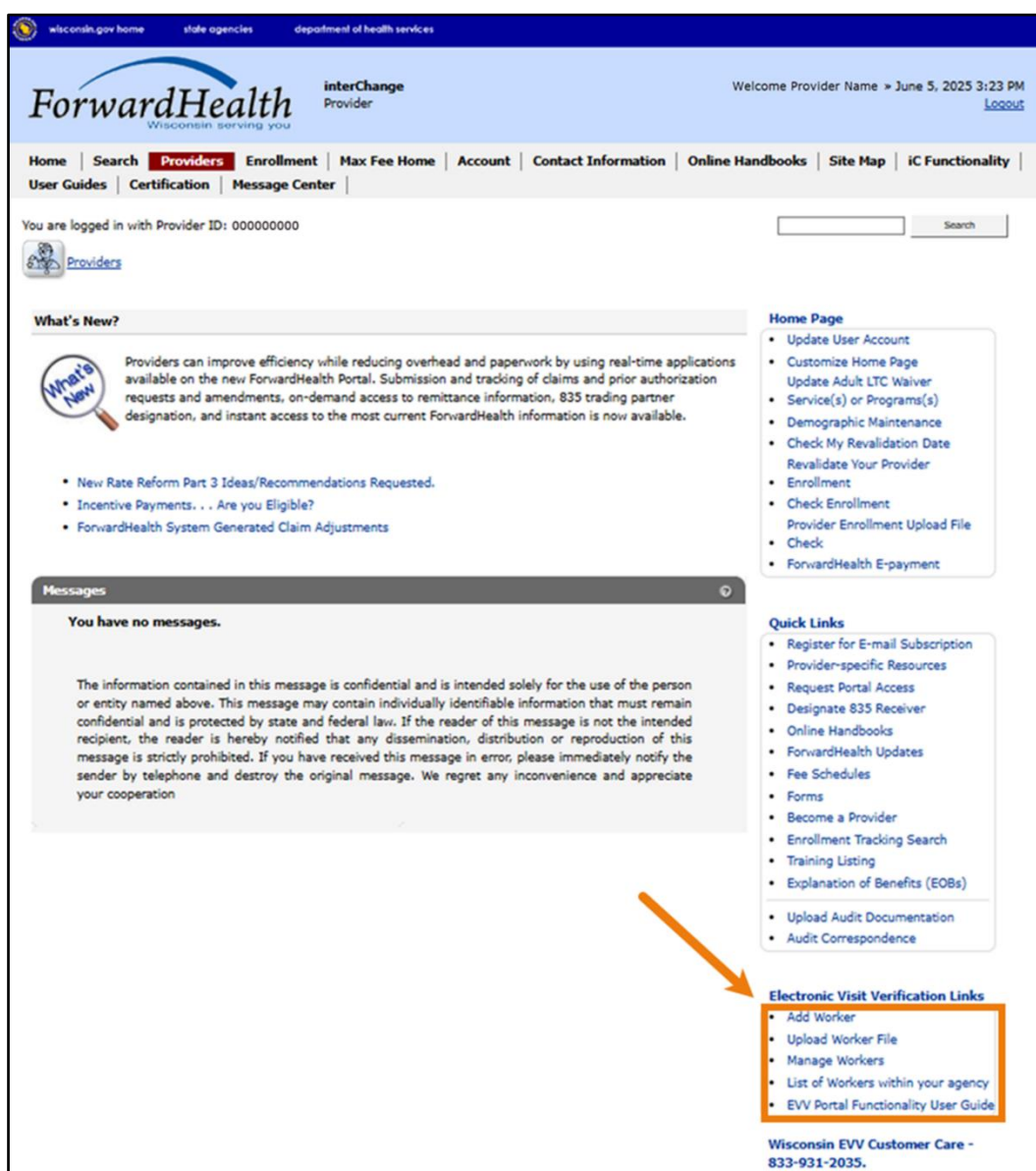


Figure 89 Secure Provider Page—Electronic Visit Verification Links

## 8.1 Add Worker

This method of worker association allows a provider to manually enter an individual worker's information. To avoid duplication, always start by searching for the worker first.

1. Click **Add Worker** under the Electronic Visit Verification Links section of the secure Provider page. The Add Worker panel will be displayed.

**Add Worker**

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

\*\* DHS does not require live-in workers to capture EVV; however, some HMOs, MCOs, or provider agencies may require live-in workers to capture EVV. Only check the box "Exempt from EVV Requirements" if the worker is not required to capture EVV for any of the people they provide services to for your agency.

**Worker Search Criteria**

First Name\*  
Last Name\*  
Social Security Number\*  
Date of Birth (i.e. 07/04/1980)

Search  
Clear

**Worker Search Results**

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

**Add/Associate Worker**

First Name\*  
Middle Initial  
Last Name\*  
Social Security Number\*  
Date of Birth (i.e. 07/04/1980)\*  
Gender ☐ Male ☐ Female  
Worker Email  
Confirm Worker Email  
Worker Start Date (i.e. 01/03/2020)  
Exempt from EVV Requirements \* ☐

Submit Exit

**Figure 90** Add Worker Panel

2. Enter the worker's first name, last name, Social Security number, and date of birth into the fields in the "Worker Search Criteria" section. The last name and Social Security number fields are required to perform a worker search.
3. Click **Search**. The panel will refresh and display any results in the "Worker Search Results" section. If no matches to the worker's information are found in the system, a "No Match Found" message will be displayed under Worker Search Results.

### 8.1.1 No Matches Found

**Add Worker**

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

\*\* DHS does not require live-in workers to capture EVV; however, some HMOs, MCOs, or provider agencies may require live-in workers to capture EVV. Only check the box "Exempt from EVV Requirements" if the worker is not required to capture EVV for any of the people they provide services to for your agency.

**Worker Search Criteria**

First Name\*

Last Name\*

Social Security Number\*

Date of Birth (i.e. 07/04/1980)

**Worker Search Results**

Worker ID	First Name	MI	Last Name	Date of Birth	SSN
No Match Found. Enter the worker information below in the Add/Associate Worker Action					

**Add/Associate Worker**

First Name\*

Middle Initial

Last Name\*

Social Security Number\*

Date of Birth (i.e. 07/04/1980)\*

Gender ☐ Male ☐ Female

Worker Email\*

Confirm Worker Email\*

Worker Start Date (i.e. 01/03/2020)

Exempt from EVV Requirements \*\* ☐

**Figure 91** Add Worker Panel With "Worker Search Results" Section

If no match is found, the worker is new to the Portal and will need to be added. Enter the worker's information into the following fields in the "Add/Associate Worker" section:

- First Name
- Middle Initial
- Last Name
- Social Security Number
- Date of Birth (in MM/DD/YYYY format)
- Gender (optional)

- **Worker Email**—The email address must be unique to that worker and cannot be used by anyone else. The worker email can be used for multiple providers if the worker chooses to do so.
- **Confirm Worker Email**
- **Worker Start Date (in MM/DD/YYYY format)**—The worker’s EVV start date is the first date the worker will begin or began using EVV and can be a date of up to 365 days in the past, today’s date, or a future date. If the worker’s EVV start date field is left blank, the system will default the EVV start date to today’s date. The worker’s EVV start date indicates the date the worker is associated with the provider for the purposes of EVV and their information sent to Sandata. The worker will receive an email with a temporary password for the option to access Sandata Mobile Connect (SMC) one or two days after they have been entered in the Portal.
- **Exempt from EVV Requirements\*\***—This box should be checked if the [provider determines that a worker is exempt from EVV requirements](#). The system will assign the worker a unique ID; however, the worker’s information will not be sent to Sandata on the worker file.

If the provider determines a worker who was previously exempt from EVV requirements is no longer exempt, the provider can use the [Manage Workers panel](#) to uncheck the box in the Exempt from EVV Requirements\*\* field.

If the box is checked, the Worker Email and Confirm Worker Email fields are optional. If the provider enters a worker email in the Worker Email field, the Confirm Worker Email field is required. If the box is not checked, the Worker Email and Confirm Worker Email fields are required.

4. Click **Submit**. The Worker Submitted panel will be displayed.



**Figure 92** Worker Submitted Panel

The Worker Submitted panel confirms that the worker has been correctly associated with the user’s provider and displays the worker’s unique ID number for Sandata EVV purposes. This number will also be the worker’s Santrax ID if using the DHS-provided EVV solution. Provide this number to the worker if using the DHS-provided EVV solution (Sandata).

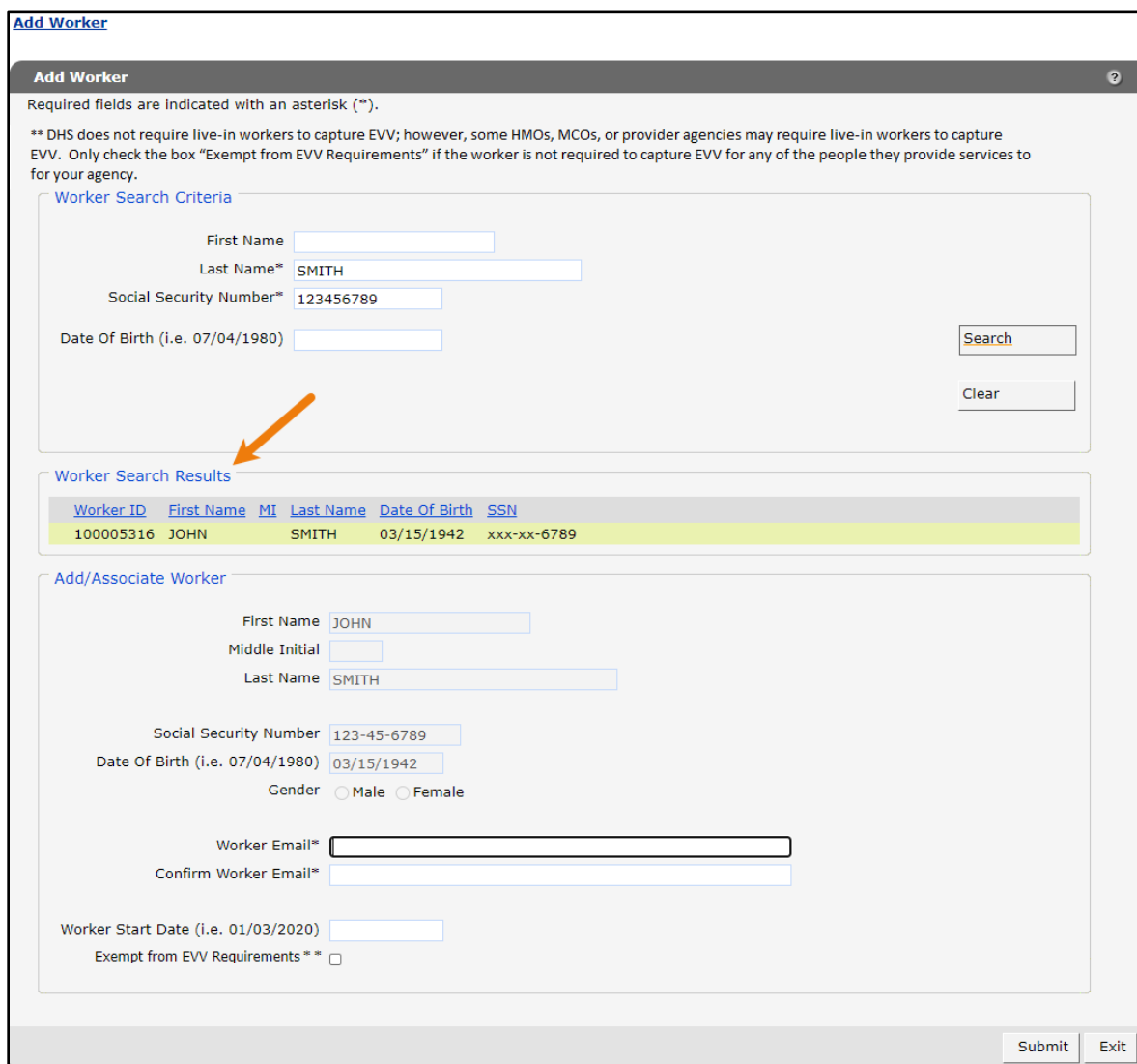
5. Click **Save** to save a copy of the corresponding file. The user does not need to click **Save** to view the report and finish associating the worker.

- Click **Exit** to return to secure Provider page.

### 8.1.2 Match Found

When a user searches for a worker and a match is found within the system, their information will be displayed in the “Worker Search Results” section. Information must be checked to ensure it is accurate. Workers will only be assigned one worker ID on the Portal throughout their career so, if the worker worked for an agency in the recent past or is currently doing so, this number will remain the same.

- Click the row containing the worker’s name. The panel will be refreshed, and the worker’s information will be populated in the fields under the “Add/Associate Worker” section.



**Add Worker**

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

\*\* DHS does not require live-in workers to capture EVV; however, some HMOs, MCOs, or provider agencies may require live-in workers to capture EVV. Only check the box “Exempt from EVV Requirements” if the worker is not required to capture EVV for any of the people they provide services to for your agency.

**Worker Search Criteria**

First Name

Last Name\*

Social Security Number\*

Date Of Birth (i.e. 07/04/1980)

**Worker Search Results**

Worker ID	First Name	MI	Last Name	Date Of Birth	SSN
100005316	JOHN		SMITH	03/15/1942	xxx-xx-6789

**Add/Associate Worker**

First Name

Middle Initial

Last Name

Social Security Number

Date Of Birth (i.e. 07/04/1980)

Gender ☐ Male ☐ Female

Worker Email\*

Confirm Worker Email\*

Worker Start Date (i.e. 01/03/2020)

Exempt from EVV Requirements \*\* ☐

**Figure 93** Add Worker Panel With Worker Information Populated

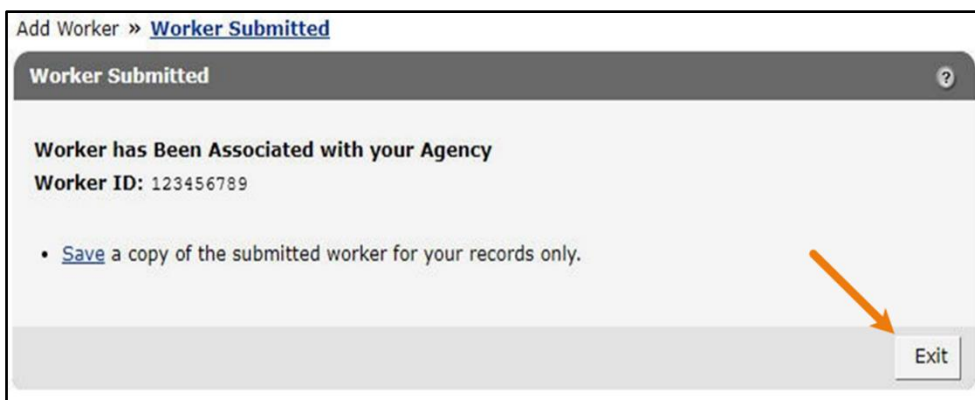
2. Enter the worker's email address in the Worker Email and Confirm Worker Email fields. The email address must be unique to that worker and cannot be used by anyone else. The worker's email can be used for multiple providers if the worker chooses to do so.

Note: If the box is checked in the Exempt from EVV Requirements\*\* field, the Worker Email and Confirm Worker Email fields are optional.

3. Enter the first date the worker will begin or began using EVV in the Worker Start Date field in MM/DD/YYYY format.

Note: The worker's EVV start date is the first date the worker will begin or began using EVV and can be a date of up to 365 days in the past, today's date, or a future date. If the worker's EVV start date field is left blank, the system will default the EVV start date to today's date. The worker's EVV start date indicates the date the worker is associated with the provider for the purposes of EVV and their information sent to Sandata. The worker will receive an email with a temporary password for the option to access SMC one or two days after they have been entered in the Portal.

4. Click **Submit**. The Worker Submitted panel will be displayed.



**Figure 94** Worker Submitted Panel

The Worker Submitted panel confirms that the worker has been correctly associated with the provider and displays the worker's unique ID number for Sandata EVV purposes. This number will also be the worker's Santrax ID if using the DHS-provided EVV solution. Provide this number to the worker if using the DHS-provided EVV solution (Sandata).

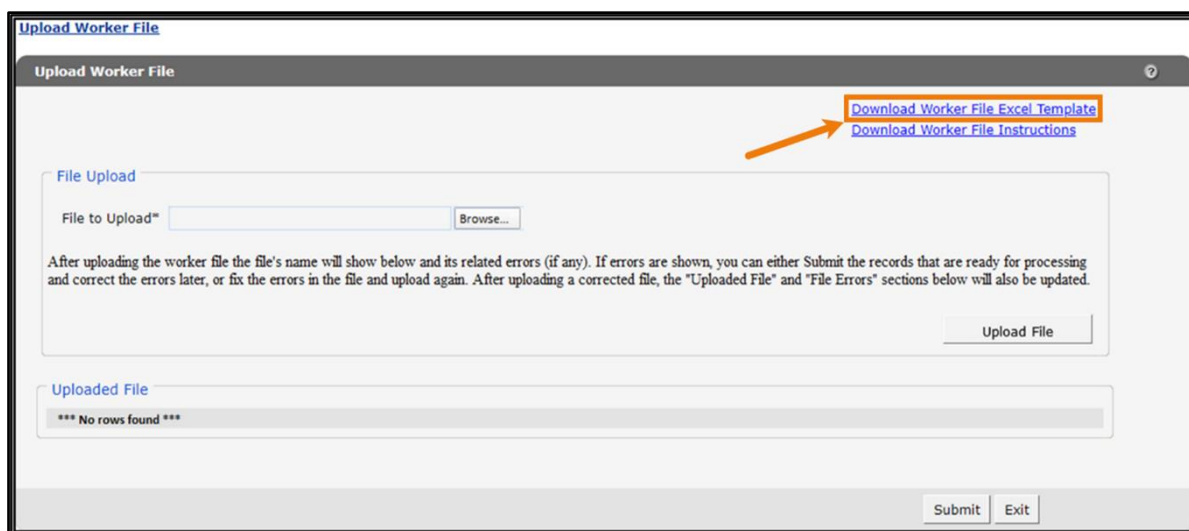
5. Click **Save** to save a copy of the corresponding file. The user does not need to click **Save** to view the report and finish associating the worker.
6. Click **Exit** to return to the secure Provider page.



## 8.2 Upload Worker File

The Upload Worker File method of worker association allows users to associate multiple workers at once by uploading a prepared Microsoft Excel file.

1. Click **Upload Worker File** under the Electronic Visit Verification Links menu of the secure Provider page. The Upload Worker File panel will be displayed.



**Figure 95** Upload Worker File Panel

2. Click **Download Worker File Excel Template** and save the template to the user's computer.
3. Navigate to the saved location on the user's computer and open the template file.
4. Within the template file, enter the information for the workers that will be associated to the provider. List the worker's first name followed by the last name as indicated in the template file.

Note: The email address must be unique to that worker and cannot be used by anyone else. The worker's email can be used for multiple providers if the worker chooses to do so. The worker's EVV start date is the first date the worker will begin or began using EVV and can be a date of up to 365 days in the past, today's date, or a future date. If the worker's EVV start date field is left blank, the system will default the EVV start date to today's date. The worker's EVV start date indicates the date the worker is associated with the provider for the purposes of EVV and their information sent to Sandata. The worker will receive an email with a temporary password for the option to access SMC one or two days after they are entered in the Portal.

Valid values for the Exempt\_from\_EVV\_Requirements column are "Y" for yes, "N" for no, or blank. If the column is blank, the default will be "N." If an invalid value is entered, the following message will be displayed: "The Exempt from EVV Requirements field contains an invalid value." The worker's email address is optional for exempt workers.

Fields in bold are required.

	A	B	C	D	E	F	G	H	I	J
1	First_Name	Middle_Initial	Last_Name	SSN	Date_of_Birth	Gender	Worker_Email	Confirm_Worker_Email	Worker_Start_Date	Exempt_from_EVV_Requirements
2	John		Smith	123456789	3/15/1942					Y
3	Sam		Sample	222222222	2/14/1968		sample@gmail.com	sample@gmail.com	6/16/2020	N

**Figure 96** Download Worker File Excel Template

- Once the information is entered, the user should save the file to their computer and exit the Excel application.
- Return to the Upload Worker File panel.
- Click **Browse**.

**Figure 97** Upload Worker File Panel

- Locate and select the saved file on the user's computer. Click **Open** to attach the file to the panel.
- Click **Upload File** to upload the file.

**Figure 98** Upload Worker File Panel

10. Once uploading is complete, the panel will be refreshed, and the name of the file and associated results will be displayed in the “Uploaded File” and “File Errors” sections.

[Upload Worker File](#)

**The following messages were generated:**  
 The file contains errors. Review the File Errors below. If you choose to submit the file, records with errors will not be uploaded. For further questions, review the User Guide.

**Upload Worker File**

[Download Worker File Excel Template](#)  
[Download Worker File Instructions](#)

**File Upload**

File to Upload\*  [Browse...](#)

After uploading the worker file the file's name will show below and its related errors (if any). If errors are shown, you can either Submit the records that are ready for processing and correct the errors later, or fix the errors in the file and upload again. After uploading a corrected file, the "Uploaded File" and "File Errors" sections below will also be updated.

[Upload File](#)

**Uploaded File**

File Name	Total Workers Records	Worker Records With Errors	Worker Records Without Errors
worker_file.xlsx	115	3	112

**File Errors**

Row Number	Error Message
4	SSN was found on the death master list
75	The SSN is required
112	The Date of Birth is not a valid date

[Submit](#) [Exit](#)

**Figure 99** Upload Worker File Panel With Uploaded File Information

If the file contains any errors, they will be displayed and detailed in the “File Errors” section. There are two options if the file contains errors:

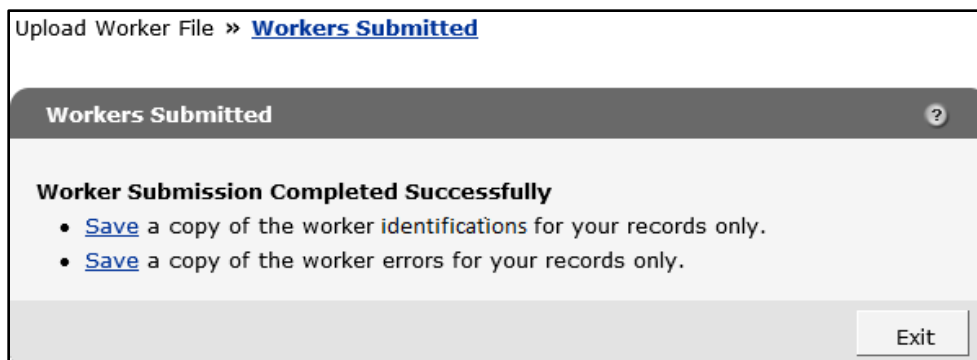
- The first option is to correct the errors in the file immediately and re-upload it.

Note: When the updated file is uploaded, the updated file’s results will replace the previous file’s results.

- The second option is to click **Submit** to upload the file as is to the system.

Note: Only those worker records without errors will be processed. If this option is chosen, the user will need to restart the process of uploading the file with corrected worker records. A copy of the worker errors can be saved after submission using the options on the next screen.

11. Once the user clicks **Submit** and the workers are associated to the user's provider, the Workers Submitted panel will be displayed.



**Figure 100** Workers Submitted Panel

12. The Workers Submitted panel allows users to save copies of the worker records that were created within the ForwardHealth system. This information includes their unique worker ID and any copies of the error report for the submitted Excel worker file. Provide this number to the worker if using the DHS-provided EVV solution (Sandata). Click **Save** to save a copy of the corresponding file.
13. Click **Exit** to return to the secure Provider page.

## 9 Manage Workers

Providers can manage their workers' email addresses and associate them to the providers on the Portal using the Manage Workers tool.

1. Click **Manage Workers** under the Electronic Visit Verification Links section of the secure Provider page. The Manage Workers panel will be displayed.

**Manage Workers**

To search all workers associated with your agency, click Search without adding values to the Worker Search Criteria fields.

\*\* DHS does not require live-in workers to capture EVV; however, some HMOs, MCOs, or provider agencies may require live-in workers to capture EVV. Only check the box "Exempt from EVV Requirements" if the worker is not required to capture EVV for any of the people they provide services to for your agency.

**Worker Search Criteria**

First Name

Last Name

Social Security Number

Date Of Birth (i.e. 07/04/1980)

**Worker Search Results**

Worker ID	First Name	MI	Last Name	Date Of Birth	SSN
100005738	IMA		CAREGIVER	08/11/1977	xxx-xx-8989
100005739	WILL		DO	03/15/1942	xxx-xx-2323
100005740	JUSTIN		TIME	10/30/1990	xxx-xx-6565

**Worker Information**

First Name

Middle Initial

Last Name

Social Security Number

Date Of Birth (i.e. 07/04/1980)

Gender ☐ Male ☐ Female ☐ N/A

Worker Email  ☐ Update Worker Email

Worker Start Date (i.e. 01/03/2020)

Worker End Date (i.e. 12/30/2020)\*

Exempt from EVV Requirements\*\* ☐

**Figure 101** Manage Workers Panel

2. Enter information for the worker whose information needs updating, then click **Search**. The panel will be refreshed and results matching the search criteria will be displayed in the "Worker Search Results" section. The last name and Social Security number fields are required to perform a worker search. If no search criteria were entered and the user selects the Search button, a list of all workers associated with the provider will be displayed.
3. Click the row containing the worker's name. The panel will be refreshed, and the worker's information will be populated in the fields in the "Worker Information" section.

## Notes:

- If the box in the Exempt from EVV Requirements\*\* field is checked and a provider determines the worker is no longer exempt from EVV requirements, they can uncheck the box. The provider will also need to add a worker email address. The action of unchecking the box and adding the worker email address will ensure the worker will be sent to Sandata on the worker file.
- The only editable fields are the Worker Email, Worker Start Date, Worker End Date, and Exempt from EVV Requirements\*\*. The employee start date can be backdated up to 365 days in the Worker Start Date field. If changes to other fields are needed, the provider will need to contact Wisconsin EVV Customer Care at 833-931-2035, Monday–Friday, 7 a.m.–6 p.m.

**Manage Workers**

To search all workers associated with your agency, click Search without adding values to the Worker Search Criteria fields.

\*\* DHS does not require live-in workers to capture EVV; however, some HMOs, MCOs, or provider agencies may require live-in workers to capture EVV. Only check the box "Exempt from EVV Requirements" if the worker is not required to capture EVV for any of the people they provide services to for your agency.

**Worker Search Criteria**

First Name

Last Name

Social Security Number

Date Of Birth (i.e. 07/04/1980)

**Worker Search Results**

Worker ID	First Name	MI	Last Name	Date Of Birth	SSN
100005738	IMA		CAREGIVER	08/11/1977	xxx-xx-8989
100005739	WILL		DO	03/15/1942	xxx-xx-2323
100005740	JUSTIN		TIME	10/30/1990	xxx-xx-6565

**Worker Information**

First Name

Middle Initial

Last Name

Social Security Number

Date Of Birth (i.e. 07/04/1980)

Gender ☐ Male ☐ Female ☒ N/A

Worker Email  ☐ Update Worker Email

Worker Start Date (i.e. 01/03/2020)

Worker End Date (i.e. 12/30/2020)\*

Exempt from EVV Requirements\*\* ☐

Figure 102 Manage Workers Panel With Worker Information Populated

- Click the **Update Worker Email** checkbox. The New Worker Email and Confirm New Worker Email fields will be displayed.



Worker Email \* drsmith@gmail.com ☒ Update Worker Email

New Worker Email

Confirm New Worker Email

**Figure 103** New Worker Email Fields

- Enter the new email for the worker in the fields.

Note: The email address must be unique to that worker and cannot be used by anyone else. The worker email can be used for multiple providers if the worker chooses to do so.

6. If the worker is no longer employed with the provider, the user can disassociate them from the provider by entering the last date of employment in the Worker End Date field in MM/DD/YYYY format.

**Manage Workers**

To search all workers associated with your agency, click Search without adding values to the Worker Search Criteria fields.

\*\* DHS does not require live-in workers to capture EVV; however, some HMOs, MCOs, or provider agencies may require live-in workers to capture EVV. Only check the box "Exempt from EVV Requirements" if the worker is not required to capture EVV for any of the people they provide services to for your agency.

**Worker Search Criteria**

First Name

Last Name

Social Security Number

Date Of Birth (i.e. 07/04/1980)

**Worker Search Results**

Worker ID	First Name	MI	Last Name	Date Of Birth	SSN
100005738	IMA		CAREGIVER	08/11/1977	xxx-xx-8989
100005739	WILL		DO	03/15/1942	xxx-xx-2323
100005740	JUSTIN		TIME	10/30/1990	xxx-xx-6565

**Worker Information**

First Name

Middle Initial

Last Name

Social Security Number

Date Of Birth (i.e. 07/04/1980)

Gender ☐ Male ☐ Female ☒ N/A

Worker Email  ☐ Update Worker Email

Worker Start Date (i.e. 01/03/2020)

Worker End Date (i.e. 12/30/2020)\*

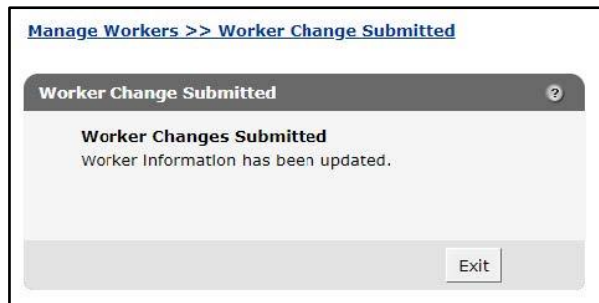
Exempt from EVV Requirements\*\* ☐

**Figure 104** Manage Workers Panel With Disassociating Information

Note: Adding a worker's end date will only affect that provider and does not affect other providers that the worker may be employed with.



- Click **Submit**. The worker's information will be updated within the ForwardHealth system, and the Worker Change Submitted panel will be displayed.



**Figure 105** Worker Change Submitted Panel

- Click **Exit** to return to the secure Provider page.

# 10 List of Workers Within Your Agency

Users can view reports that list all the workers currently associated with the provider or all workers including workers that have been end-dated.

1. Click **List of Workers within your Agency** under the Electronic Visit Verification Links section of the secure Portal page. The List of Workers panel will be displayed.

**Figure 106** List of Workers Within Your Agency Panel

2. Select “All Workers” or “All Active Workers.”
3. Click the Generate Workers Report link and the corresponding file in comma-separated value (CSV) format will be opened. This file can also be saved as an Excel file.

Note: All active workers will show as the high-end system date of 12/31/2299.

	A	B	C	D	E	F	G	H
1	Title: AgencyID 100000001 EVV IDENTIFICATION UAT - All Workers							
2	Worker ID	First Name	Last Name	SSN	Worker Email	Start Date	End Date	Exempt from EVV Requirements
3	100005309	JUSTIN	TIME	xxx-xx-2920	time@email.com	7/22/2020	7/30/2020	N
4	100005310	WILL	DO	xxx-xx-6271		7/22/2020	12/31/2299	Y
5	100005323	IMA	CAREGIVER	xxx-xx-6756	caregiver@email.com	7/27/2020	12/31/2299	N

**Figure 107** List of All Workers

	A	B	C	D	E	F	G	H
1	Title: AgencyID 100000001 EVV IDENTIFICATION UAT - All Active Workers							
2	Worker ID	First Name	Last Name	SSN	Worker Email	Start Date	End Date	Exempt from EVV Requirements
3	100005310	WILL	DO	xxx-xx-6271		7/22/2020	12/31/2299	Y
4	100005323	IMA	CAREGIVER	xxx-xx-6756	caregiver@email.com	7/27/2020	12/31/2299	N

**Figure 108** List of All Active Workers