

# User Guide

## Electronic Visit Verification Portal Functionality

March 11, 2024

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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 telephone.

Setting up a secure ForwardHealth Provider Portal account will start the training process with the Wisconsin Department of Health Services (DHS) EVV system. A ForwardHealth 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 Identification

In order for EVV information to be correctly associated to claims and encounters, DHS requires all providers and workers to have a unique ID number. The process for acquiring this ID number differs among Medicaid-enrolled providers, non-Medicaid-enrolled providers, and workers. Medicaid-enrolled providers will use their Medicaid ID and will not need to go through the provider ID process for the purposes of EVV.

### 2.1 Medicaid-Enrolled Providers

Medicaid-enrolled providers that provide personal care, supportive home care, and home health care services will use their Medicaid ID for the purposes of EVV. These providers need not take any further action for their provider agency to be identified for the purposes of EVV. However, they will need to take action to identify their workers for the purposes of EVV.

### 2.2 Non-Medicaid-Enrolled Provider Identification Process

Providers who are not required to be Medicaid-enrolled as part of their normal delivery of services to members or participants, such as supportive home care agencies, will need to request a provider agency ID through the ForwardHealth Portal for the purposes of EVV. To generate this ID, non-Medicaid-enrolled providers will need to follow the steps below.

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

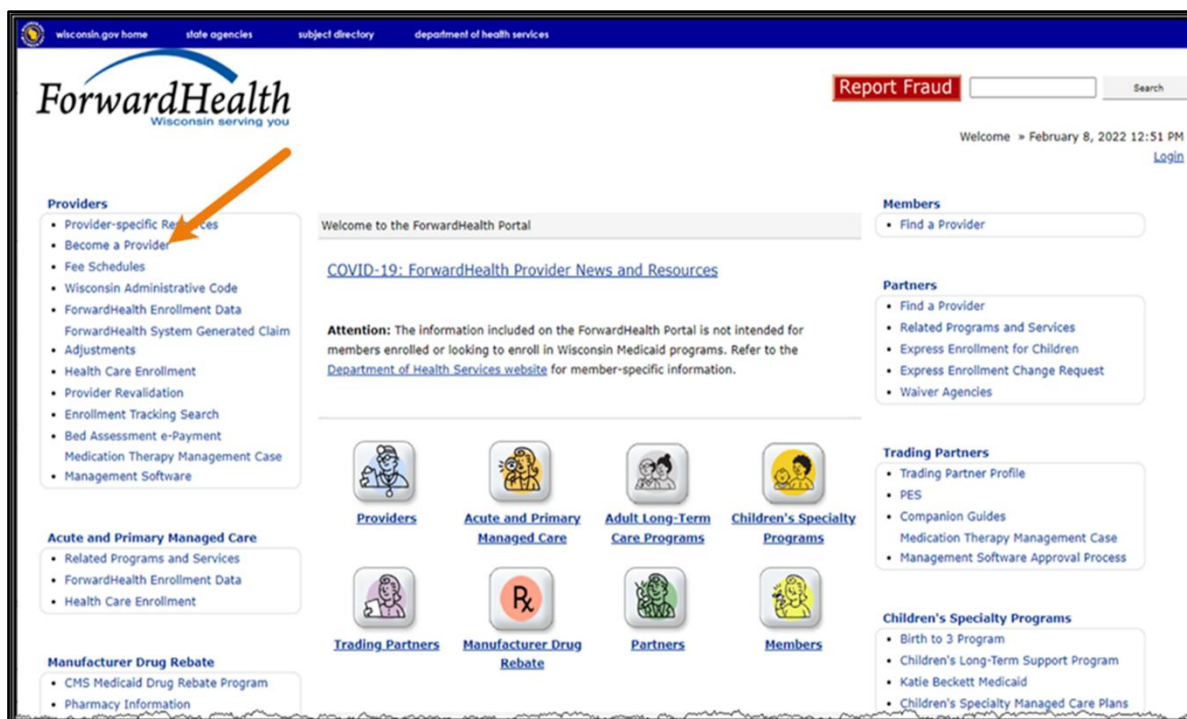


Figure 1 ForwardHealth Portal Homepage

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

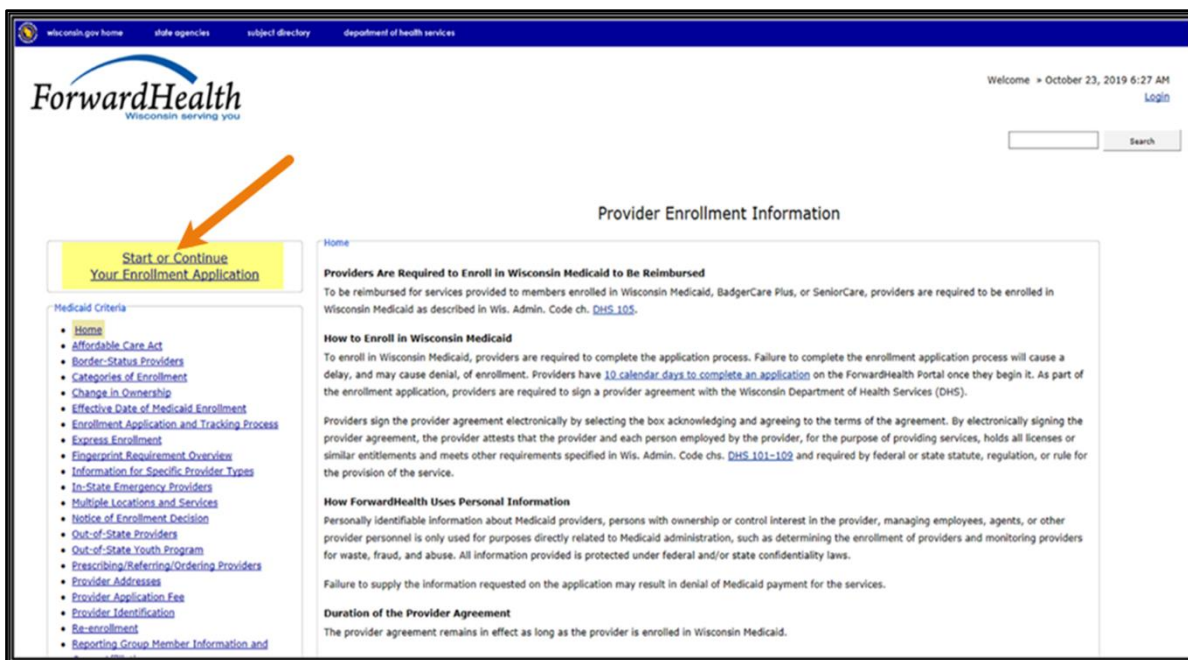


Figure 2 Provider Enrollment Information Page

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

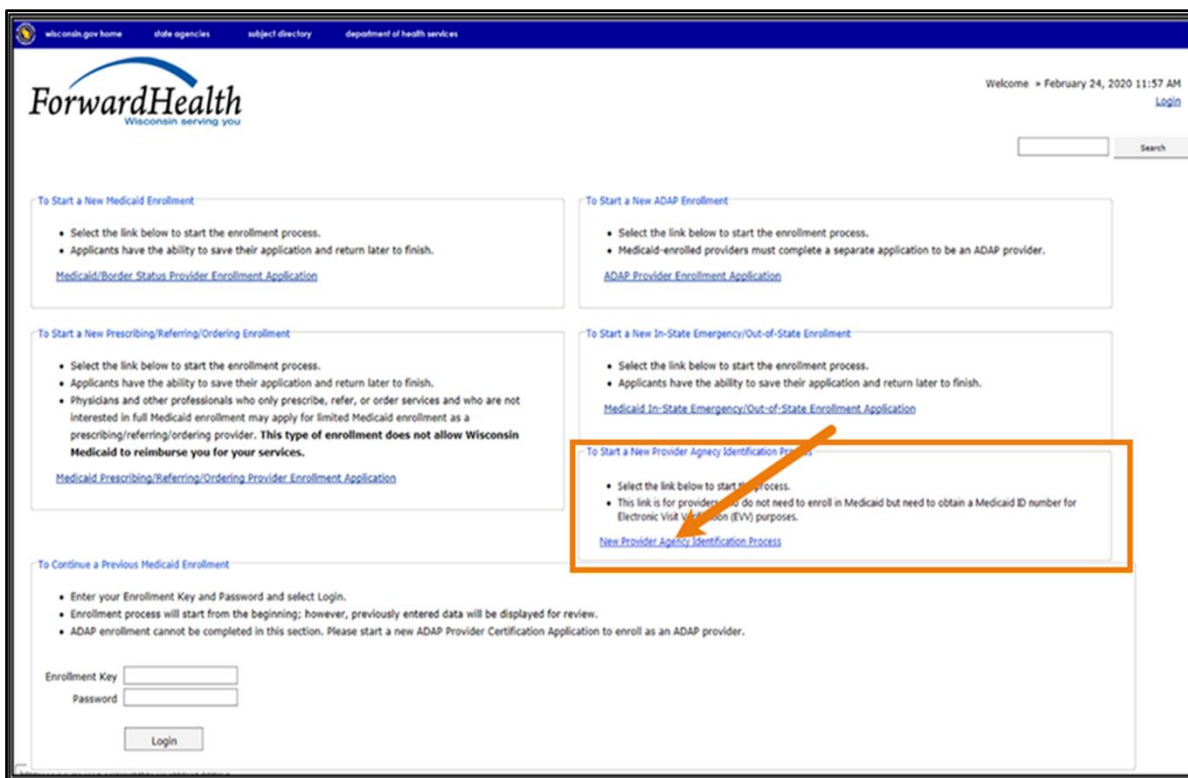
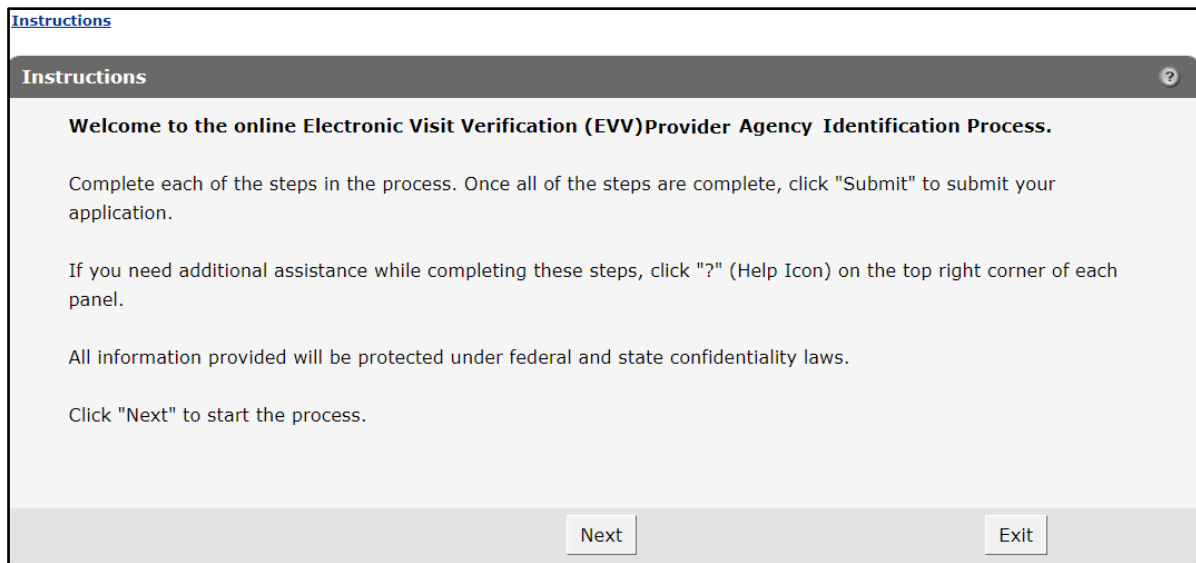


Figure 3 Enrollment Application Page

- Click **New Provider Agency Identification Process**. The Instructions panel will be displayed.



The screenshot shows a web browser window with a dark header bar containing the word "Instructions" and a help icon. Below the header, the main content area contains the following text:

**Welcome to the online Electronic Visit Verification (EVV) Provider Agency Identification Process.**

Complete each of the steps in the process. Once all of the steps are complete, click "Submit" to submit your application.

If you need additional assistance while completing these steps, click "?" (Help Icon) on the top right corner of each panel.

All information provided will be protected under federal and state confidentiality laws.


Click "Next" to start the process.

At the bottom of the panel, there are two buttons: "Next" and "Exit".

**Figure 4** Instructions Panel

- Read the instructions. Click **Next** to continue. The Agency Name panel will be displayed.

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



The screenshot shows a web browser window with a dark header bar containing the text "Instructions > agency\_name" and a help icon. Below the header, the main content area contains the following text:

**Agency Name**

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

Agency Name\*

At the bottom of the panel, there are three buttons: "Previous", "Next", and "Exit".

**Figure 5** Agency Name Panel

- Enter the full business name of the EVV provider agency.

- Click **Next**. The Mailing Address panel will be displayed.

**Figure 6** Mailing Address Panel

- Enter the primary contact for EVV, including their name in the *Attention Line* field, full mailing address, nine-digit zip code, phone number, and email address.
- Click **Next**. The Tax Information panel will be displayed.

**Figure 7** Tax Information Panel

10. Enter the business’s tax information in the corresponding fields. If there is not a prior match to the tax ID number (TIN) within the ForwardHealth system, the panel will refresh and display the “1099 Address” section.

[Instructions >> Agency Name >> Mailing Address >> Tax Information and Submit](#)

**Tax Information and Submit**

Required fields are indicated with an asterisk (\*)

This information must be the current Business Taxpayer Information on file with the IRS.

**Tax Information**

Taxpayer Identification Number (TIN)\*

Name\*

TIN Type\*  EIN  SSN

**1099 Address**

Address Line 1\*

Address Line 2

City\*

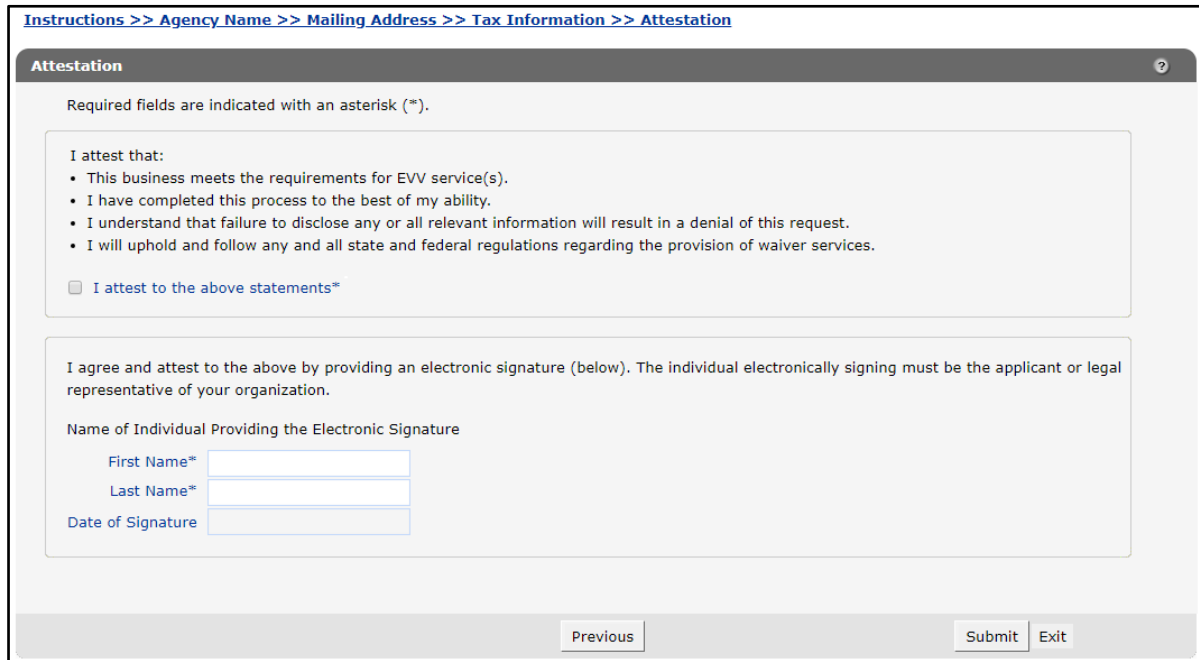
State/Zip\*

**Figure 8** Tax Information Panel With 1099 Address Section

11. Enter the business’s address information as it appears on its Internal Revenue Service 1099 tax form.



- Once all required fields have been completed, click **Next**. The Attestation panel will be displayed.



The screenshot shows the 'Attestation' panel within a web application. At the top, a breadcrumb trail reads: 'Instructions >> Agency Name >> Mailing Address >> Tax Information >> Attestation'. The panel title is 'Attestation' with a help icon. Below the title, a note states: 'Required fields are indicated with an asterisk (\*).' The main content area contains two sections. The first section, titled 'I attest that:', lists four bullet points: 'This business meets the requirements for EVV service(s).', 'I have completed this process to the best of my ability.', 'I understand that failure to disclose any or all relevant information will result in a denial of this request.', and 'I will uphold and follow any and all state and federal regulations regarding the provision of waiver services.' Below this list is a checkbox labeled 'I attest to the above statements\*'. The second section, titled 'I agree and attest to the above by providing an electronic signature (below). The individual electronically signing must be the applicant or legal representative of your organization.', contains three input fields: 'Name of Individual Providing the Electronic Signature', 'First Name\*', 'Last Name\*', and 'Date of Signature'. At the bottom of the panel, there are three buttons: 'Previous', 'Submit', and 'Exit'.

**Figure 9** Attestation Panel

The Attestation panel contains fields for providers to attest to meeting the requirements as an EVV provider and the validity of the information they have provided in the identification process.

- Read the attestation statements. If the statements are all true, click the **I attest to the above statements** checkbox.
- Provide an electronic signature by entering the user's first name, last name, and today's date in the corresponding fields.
- Click **Submit**. The Application Submitted panel will be displayed.



The screenshot shows the 'Application Submitted' panel within a web application. At the top, a breadcrumb trail reads: 'Instructions >> Agency Name >> Mailing Address >> Tax Information >> Attestation >> Application Submitted'. The panel title is 'Application Submitted' with a help icon. Below the title, the text reads: 'Your Agency ID is : 000000000'. Below this, there are two bullet points: 'Save a copy of the information submitted for your records.' and 'A PIN letter will be generated and sent to your mailing address in the next 10 business days. This account number and PIN will be used to create your ForwardHealth Portal account.' At the bottom right of the panel, there is an 'Exit' button.

**Figure 10** Application Submitted Panel

This panel displays the provider agency ID. This is the ID that DHS will use to identify the provider and begin the set-up process for the Sandata EVV system or Sandata aggregator. Users can print a copy of all the submitted information, including their provider agency ID, by clicking **Save**.

DEPARTMENT OF HEALTH SERVICES Division of Medicaid Services	STATE OF WISCONSIN
<b>WISCONSIN MEDICAID                  ELECTRONIC VISIT VERIFICATION (EVV) AGENCY IDENTIFICATION REPORT</b>	
<b>TYPE OF CERTIFICATION</b>	
Application For / Previous Provider ID / Change of Ownership Effective Date	
Provider Type	
Provider Specialty	
National Provider Identifier (NPI)	
Type of Application	
<b>MAILING INFORMATION</b>	
Name – Agency	
Name – Contact Person	
Address Line 1	
Address Line 2	
City	
State	
Zip+4 Code	
Email Address	


**Figure 11** Example EVV Agency Identification Report

<b>TAXPAYER INFORMATION</b>	
Taxpayer Identification Number (TIN)	
Name – Taxpayer	
TIN Type	
TIN Effective Date	
TIN End Date	
<b>1099 MAILING ADDRESS</b>	
Address	
City	
State	
Zip+4 Code	
<b>IDENTIFICATION AND SIGNATURE – ATTESTATION</b>	
Agency Name	Agency Director
Provider ID (If Assigned)	Agency Phone Number
Attestation	

**Figure 12** Example EVV Agency Identification Report (Cont.)

Once the user has submitted their information and successfully received their provider ID, the system will automatically begin the process of generating a PIN letter. This letter will be sent to the user within 10 days of obtaining their provider ID and will allow the user to create a ForwardHealth Portal Account. If the user does not receive their PIN letter in the mail within 10 calendar days, they should call Wisconsin EVV Customer Care at 833-931-2035, Monday–Friday, 7 a.m.–6 p.m.

Access to the secure Portal is **not** possible without a PIN. The letter includes a login ID and temporary password. For security purposes, the login ID contains only digits three–six of the Provider ID.

Tony Evers Governor		FORWARDHEALTH
Karen E. Timberlake Secretary	State of Wisconsin Department of Health Services	EW 313 BLETTNER BLVD MADISON WI 53784
		Telephone: 833-931-2035 TTY: 711
		VDXC.ContactEvv@Wisconsin.gov www.forwardhealth.wi.gov

<Letter Date>

<sequence number>  
<Provider Name>  
<Authorized Representative Name>  
<Address 1>  
<Address 2>  
<City> <State> <Zip>-<Zip4>

Dear Provider Agency:

Thank you for starting the process of identifying your agency for Electronic Visit Verification (EVV). Below is the ForwardHealth Provider Portal account ID and PIN associated with your agency. You will use these to set up your secure provider account on the ForwardHealth Portal.

Setting up your secure ForwardHealth Provider Portal account will trigger the training process with our EVV vendor, Sandata. Your Portal account also allows your provider agency to conduct business with ForwardHealth, including maintaining your worker lists and making demographic updates (such as changes to your address or tax information).

Provider Agency ID:	xx3456xxxx
Provider Type/Specialty:	EVV/EVV Provider
Zip Code:	55555-1111

For security purposes, only digits 3, 4, 5, and 6 of your Provider Agency ID are shown.

To create your secure Portal account:

- Go to the ForwardHealth Portal at [www.forwardhealth.wi.gov/](http://www.forwardhealth.wi.gov/).
- Click the Providers button.
- Under the Login to Secure Site box on the right side of the page, click the Logging in for the first time? link.
- Enter your Login ID and PIN.

Login ID: XXXXXXXXXXXX  
PIN: XXXXXXXXXXXX

You can find detailed instructions and helpful hints on setting up your secure Portal account in the ForwardHealth Portal Account User Guide at [www.forwardhealth.wi.gov/](http://www.forwardhealth.wi.gov/). Please contact Wisconsin EVV Customer Care at [VDXC.ContactEvv@Wisconsin.gov](mailto:VDXC.ContactEvv@Wisconsin.gov) or 833-931-2035 with any questions.

F-02663 (06/2020)

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

**Figure 13** PIN Letter

# 3 Set Up an Account

After receiving a PIN letter, administrative account users may set up an account on the ForwardHealth 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.

## 3.1 Logging in for First Time

1. After the PIN letter is received, access the ForwardHealth Portal at <https://www.forwardhealth.wi.gov/>.

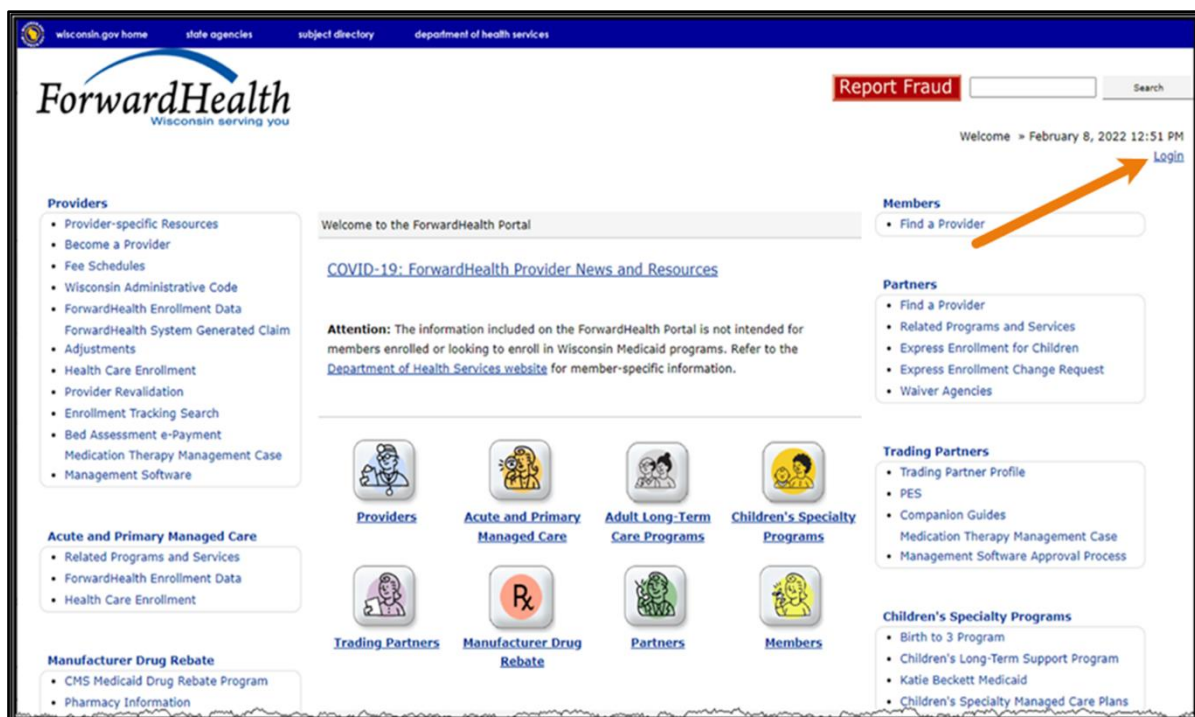
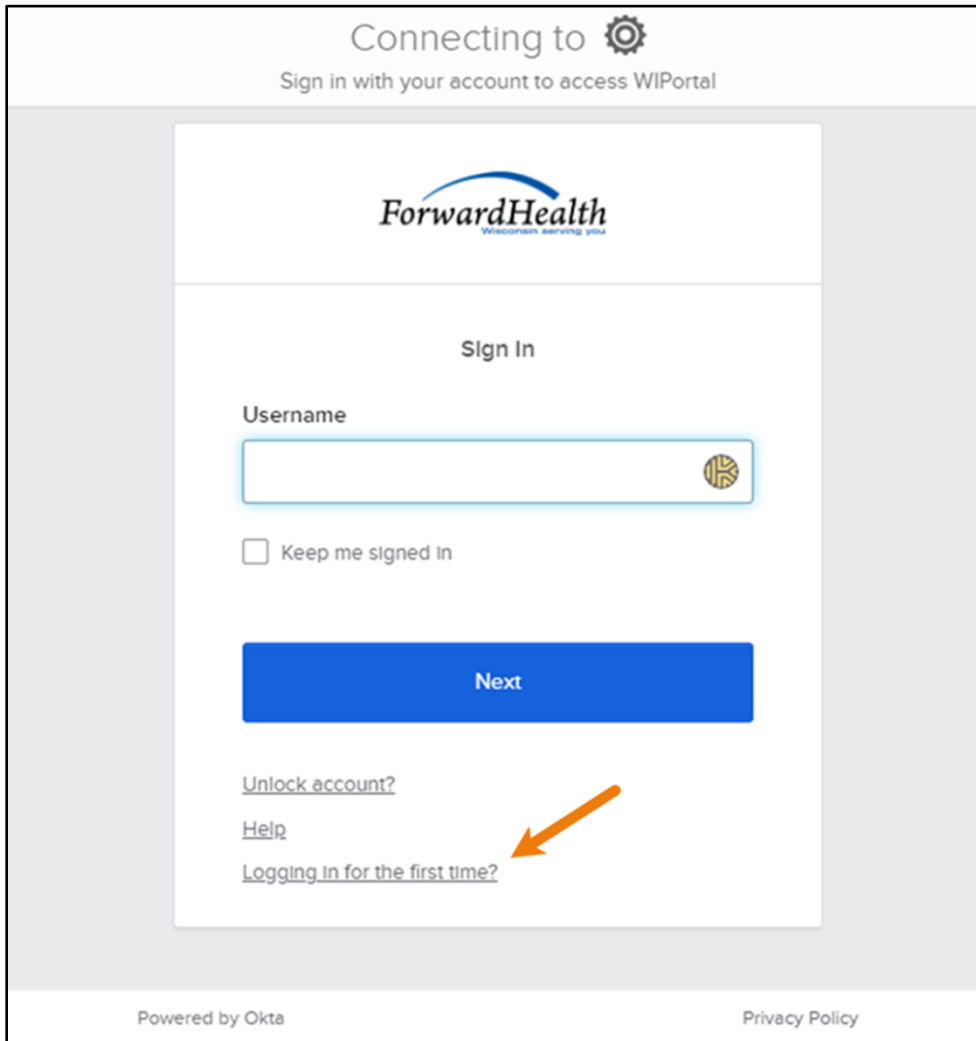


Figure 14 ForwardHealth Portal Homepage

2. Click **Login**.

3. A Sign In box will be displayed.



**Figure 15** 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 16** 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\*

**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 17** Account User Profile Page

7. Enter information in the fields. It is necessary to **complete all the fields** on this page.

- The user name must be between six–20 characters and can only contain letters and numbers. The user name is not case-sensitive.

Note: The user name cannot be changed without deactivating the account.

- The password must be between nine–15 characters and must contain three different types of characters such as uppercase letters, lowercase letters, special characters, or numbers. The password must be unique and cannot contain information from the user name, contact first name, or contact last name.
  - The telephone number must include the area code. The number will automatically format.
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 ForwardHealth Portal as they are billing Medicaid.

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

**ForwardHealth**  
Wisconsin serving you

Search

Welcome » September 28, 2016 12:09 PM

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

End User Point and Click Agreement:

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 18** 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 ForwardHealth Portal homepage and will not be able to access the secure Provider area of the Portal.

- The user’s secure Provider page will be displayed. EVV providers will only have access to the EVV links displayed under the Quick Links section of their secure Provider page.

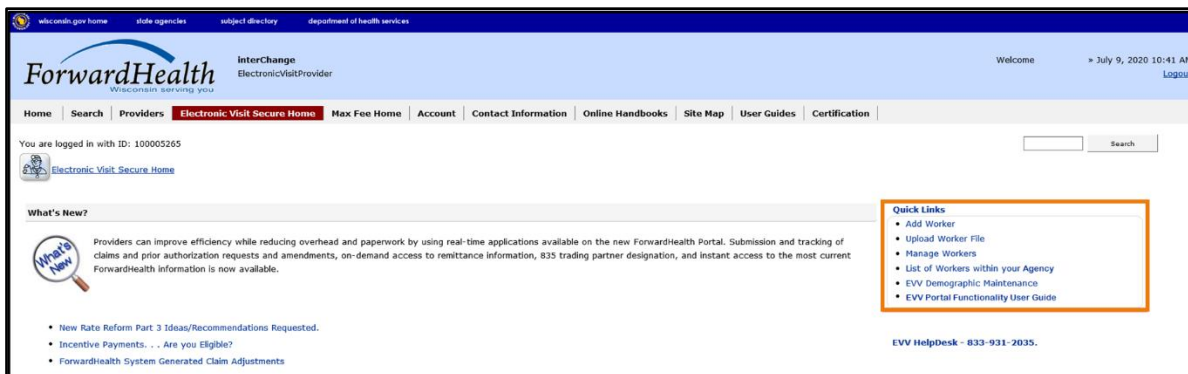


Figure 19 Secure Provider Page—EVV Provider

### 3.2 Reset Password

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

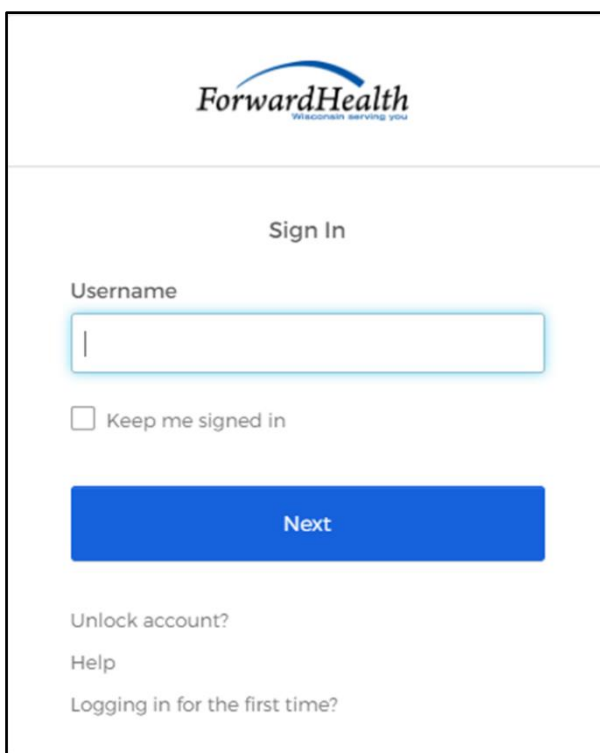
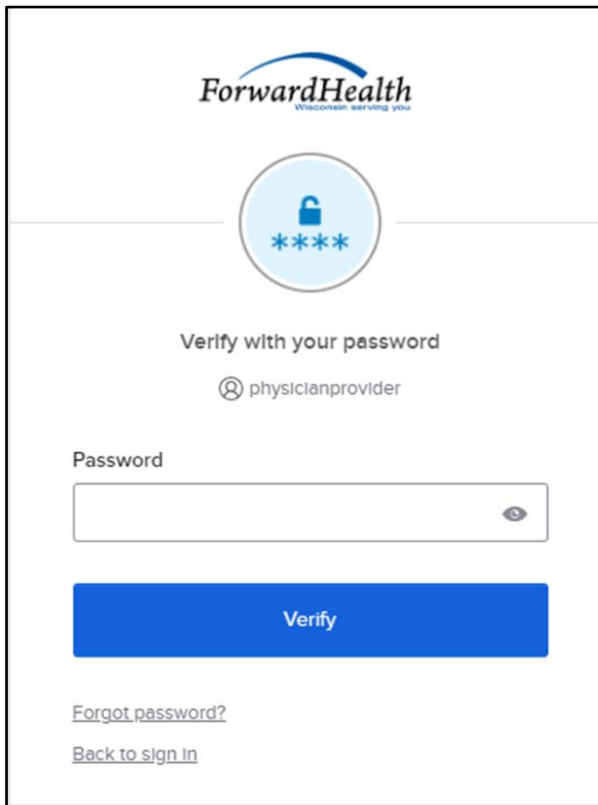


Figure 20 Sign-In Box

- Enter the user’s username.
- Click **Next**.

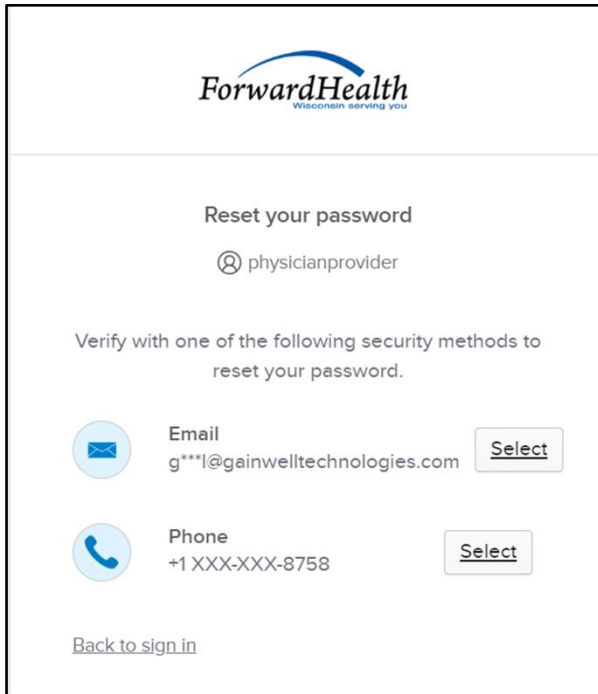
A Verify with your password box will be displayed.



**Figure 21** Verify With Your Password Box

5. Click **Forgot password?**

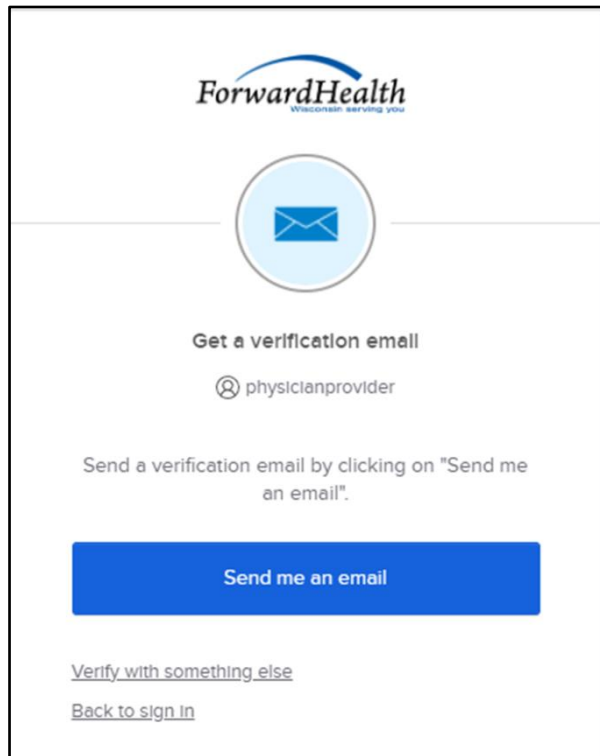
A Reset your password box will be displayed.



**Figure 22** Reset Your Password Box

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

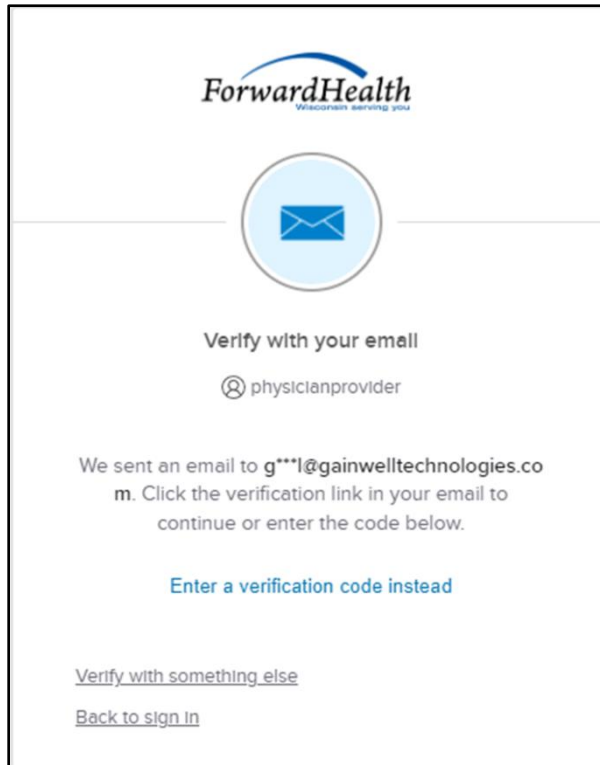
- If the user clicks **Select** for email:
  - a. A Get a verification email box will be displayed.



**Figure 23** 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.

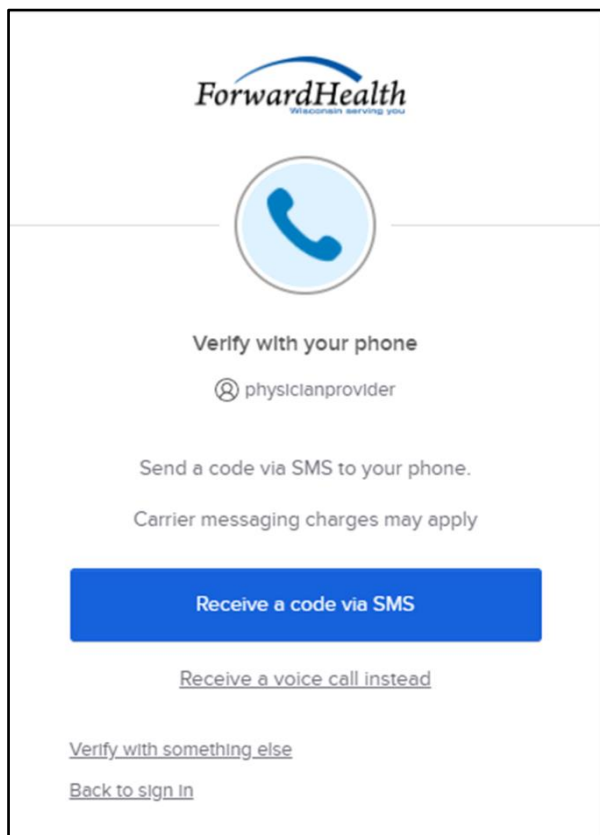
A verify with your email box will be displayed and an email will be sent.



**Figure 24** Verify With Your Email Box

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

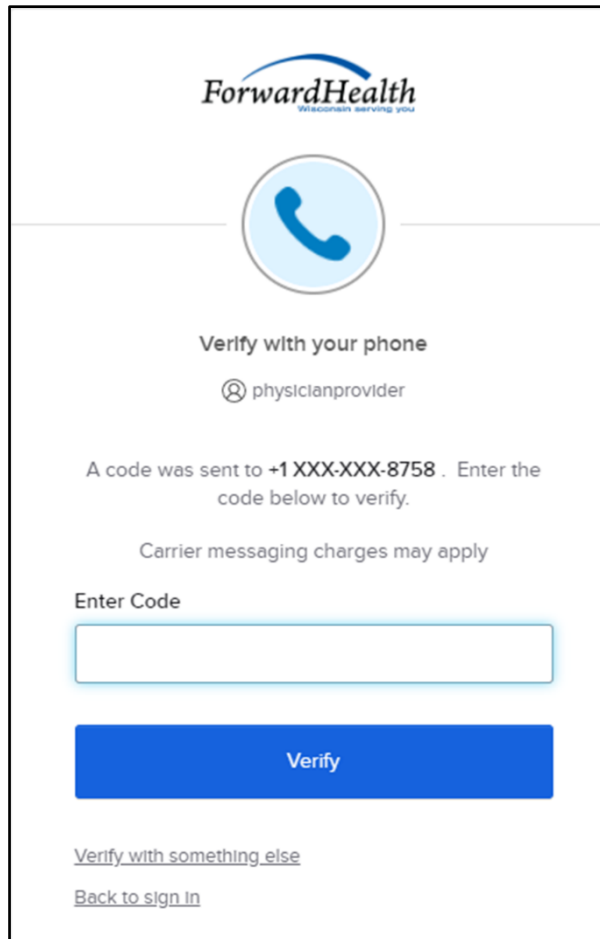
- If the user clicks **Select** for phone:
  - a. A verify with your phone box will be displayed.



**Figure 25** 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.



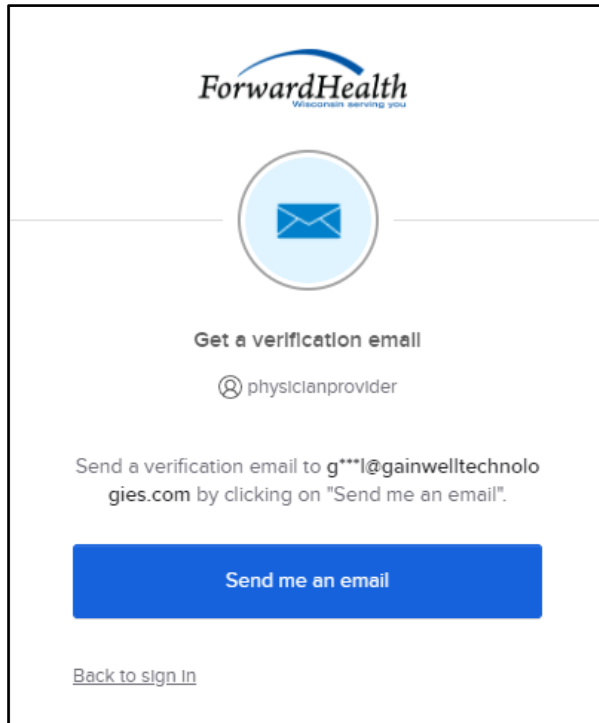
The screenshot shows a mobile verification screen for ForwardHealth. At the top is the ForwardHealth logo with the tagline 'Wisconsin serving you'. Below the logo is a circular icon containing a blue telephone handset. The main heading is 'Verify with your phone', followed by a user identifier 'physicianprovider' with a small circular icon to its left. A message states: 'A code was sent to +1 XXX-XXX-8758 . Enter the code below to verify.' Below this is a note: 'Carrier messaging charges may apply'. There is a text input field labeled 'Enter Code' with a light blue border. Below the input field is a prominent blue button with the text 'Verify'. At the bottom of the screen, there are two links: '[Verify with something else](#)' and '[Back to sign in](#)'.

**Figure 26** Verify With Your Phone Box

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



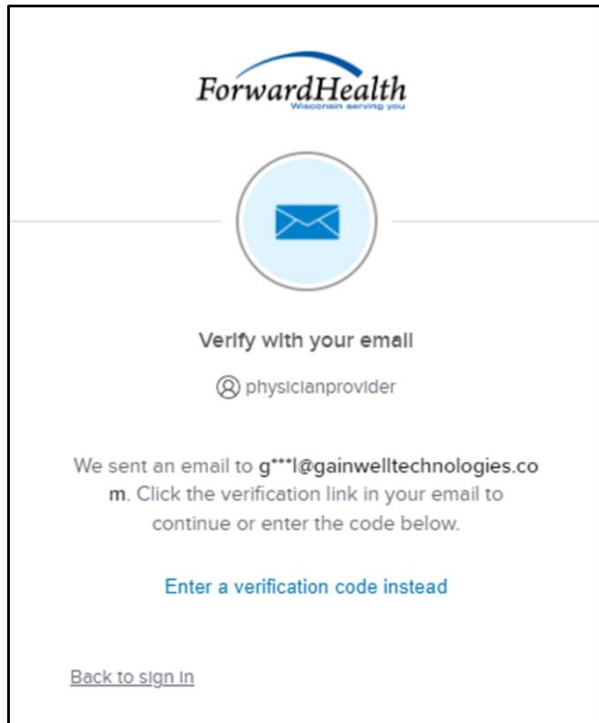
A Get a verification email box will be displayed.



**Figure 27** 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 28** 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).

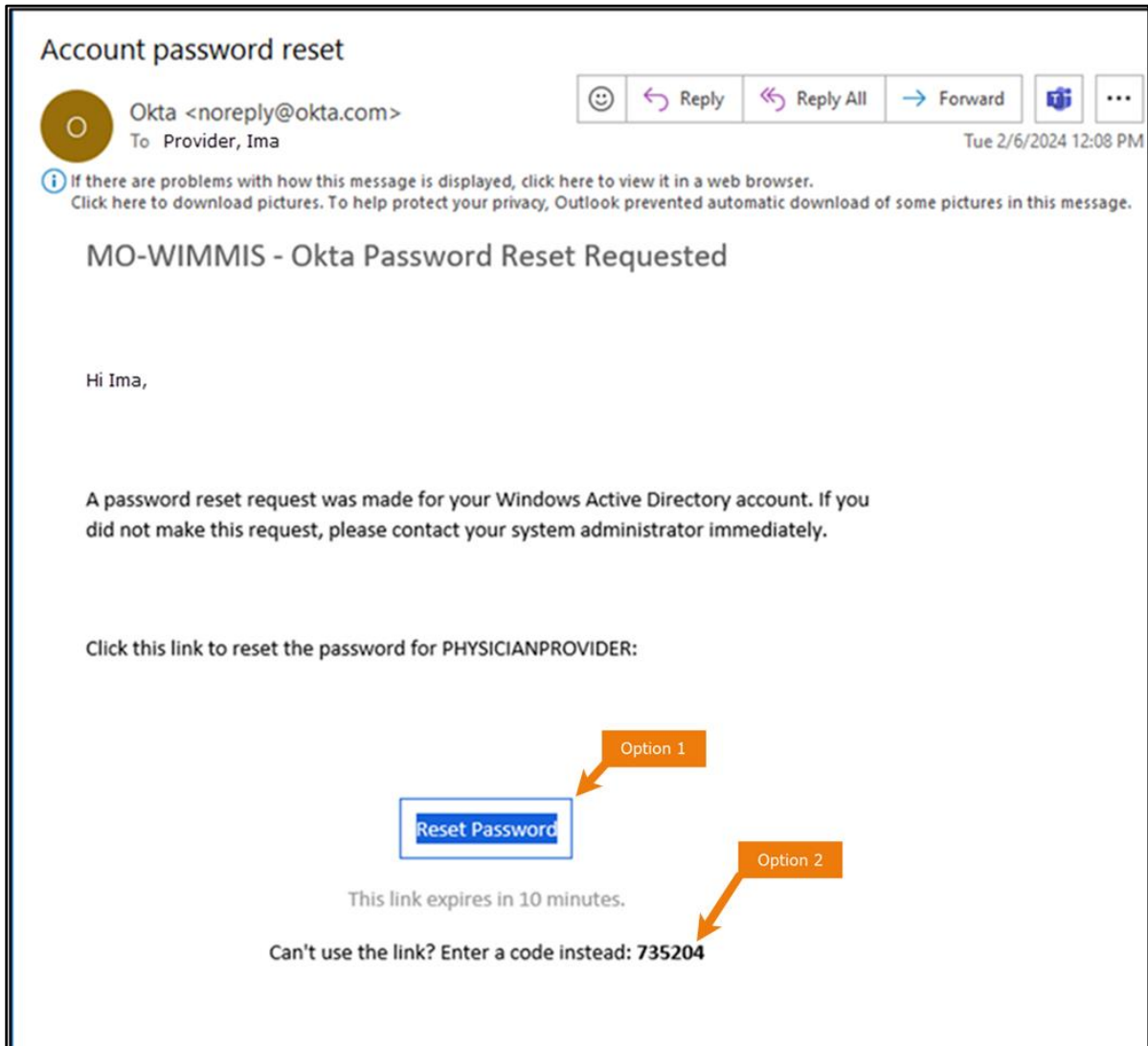
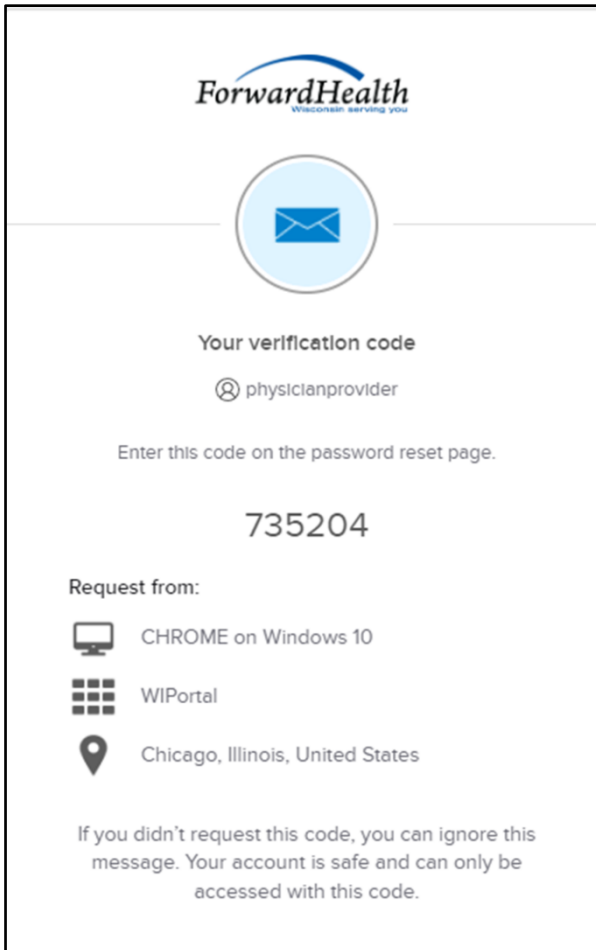


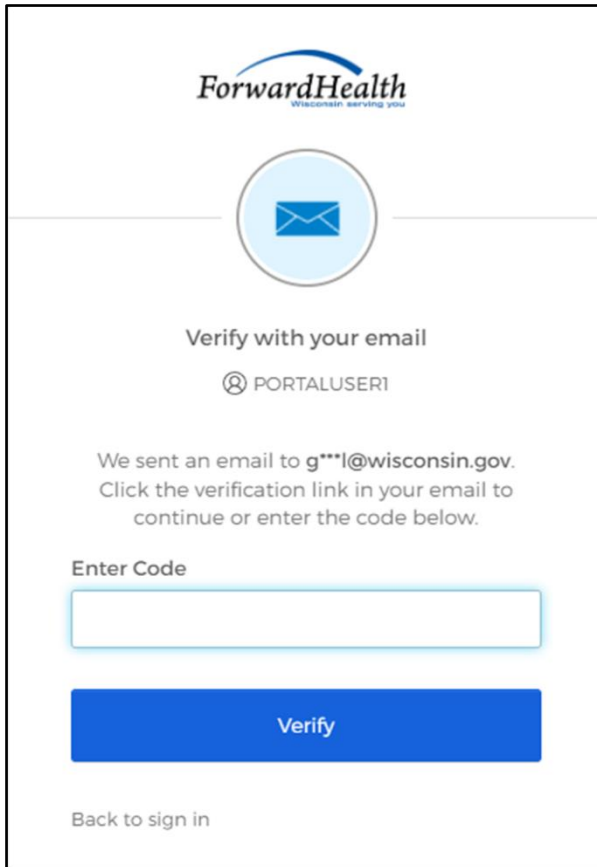
Figure 29 Account Password Reset Email

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 30** 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**.



**Figure 31** Verify With Your Email Box

The Reset your Okta password box will be displayed.

**ForwardHealth**  
Wisconsin serving you

**Reset your Okta password**

midixon

Password requirements:

- At least 9 characters
- A lowercase letter
- An uppercase letter
- A number
- No parts of your username
- Password can't be the same as your last 24 passwords

New password

Re-enter password

Sign me out of all other devices.

**Reset Password**

[Back to sign in](#)

**Figure 32** 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.

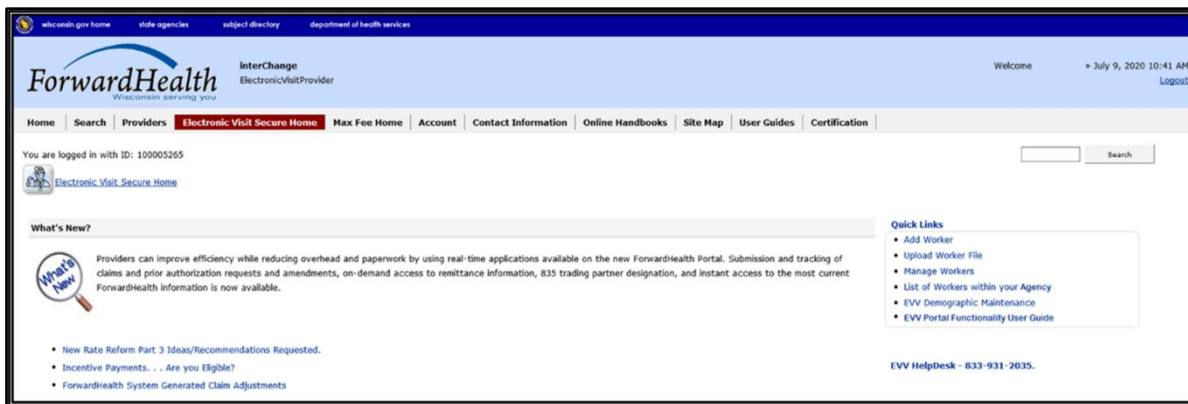


Figure 33 Secure Portal Page

### 3.3 Unlocking An Account

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

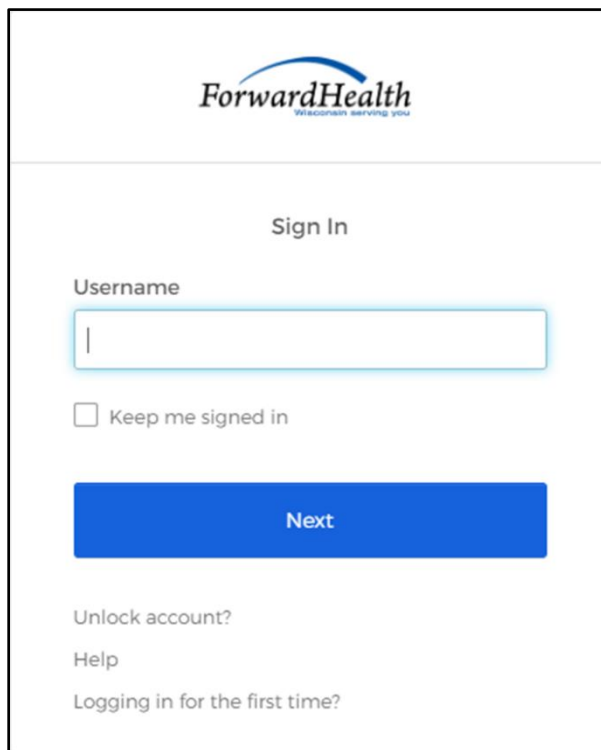
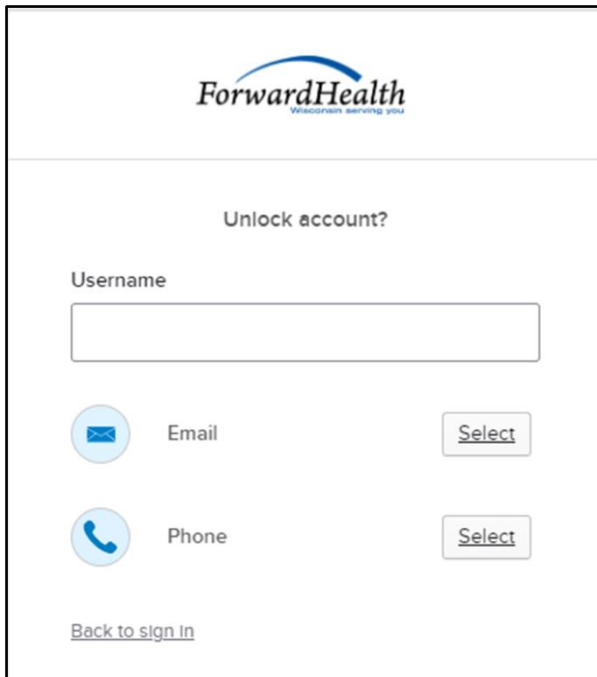


Figure 34 Sign In Box

3. Click **Unlock account?**

An Unlock account box will be displayed.



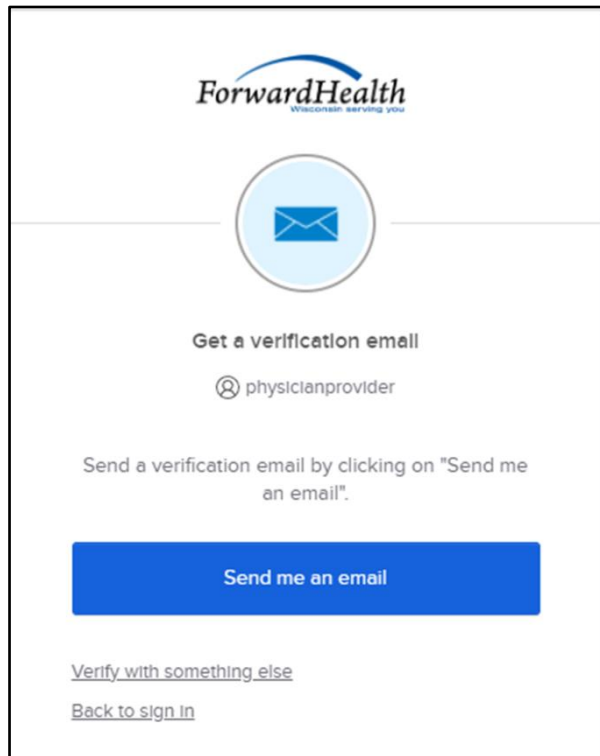
The screenshot shows the ForwardHealth logo at the top, with the tagline "Wisconsin serving you". Below the logo is the heading "Unlock account?". Underneath is a "Username" label followed by a text input field. Below the input field are two options: "Email" with an envelope icon and a "Select" button,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

**Figure 35** Unlock Account Box

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



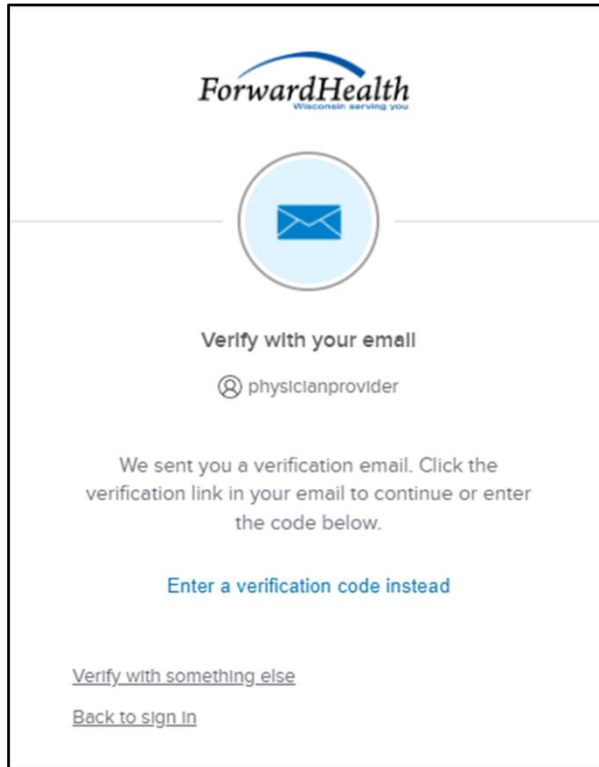
- If the user clicks **Select** for email:
  - a. A Get a verification email box will be displayed.



**Figure 36** 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.

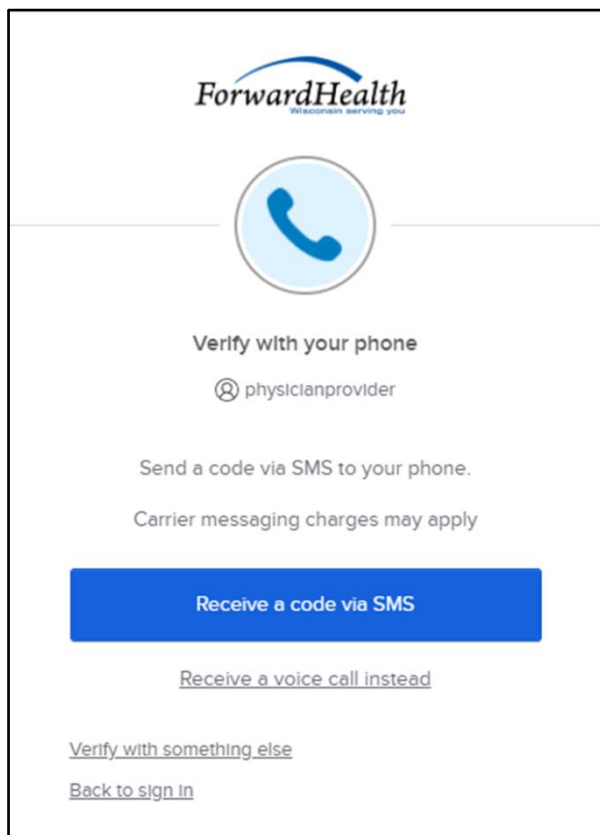
A verify with your email box will be displayed and an email will be sent.



**Figure 37** 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 38** 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

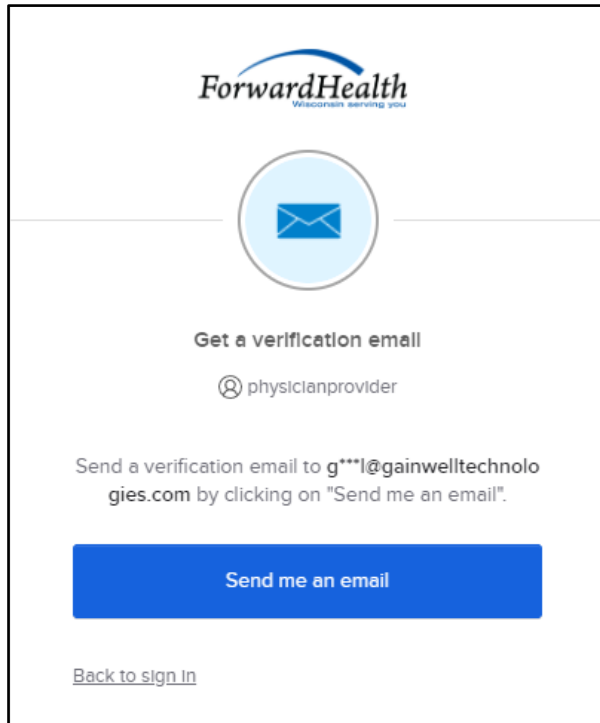
**Verify**

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

**Figure 39** Verify With Your Phone Box

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

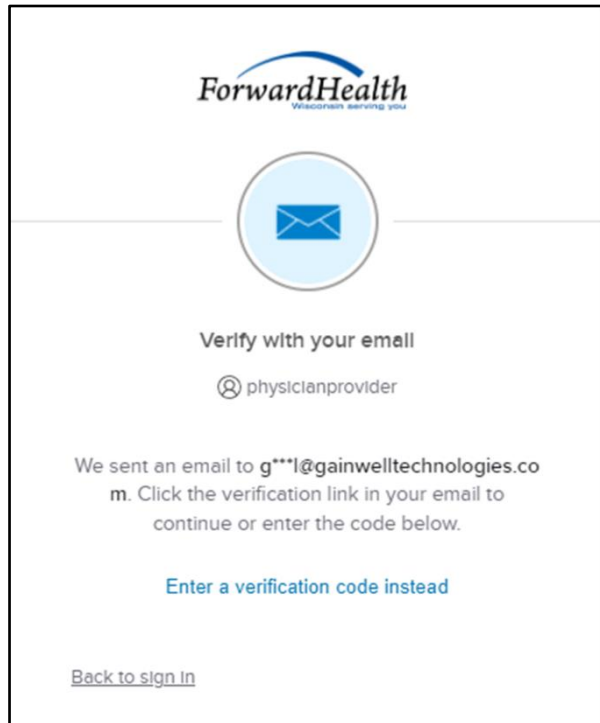
A Get a verification email box will be displayed.



**Figure 40** Get a Verification Email Box

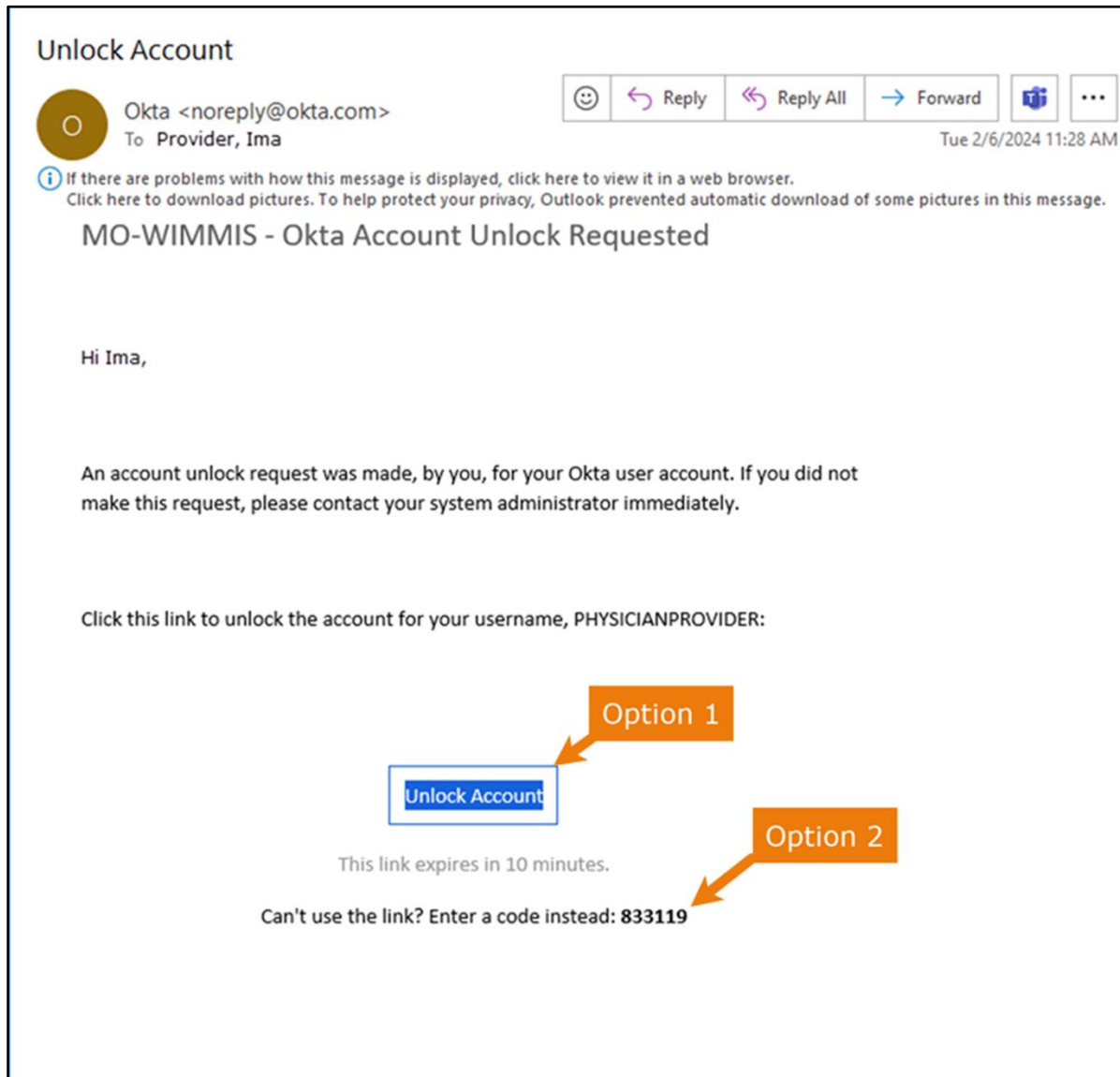
- e. Click **Send me an email**.

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



**Figure 41** Verify With Your Email Box

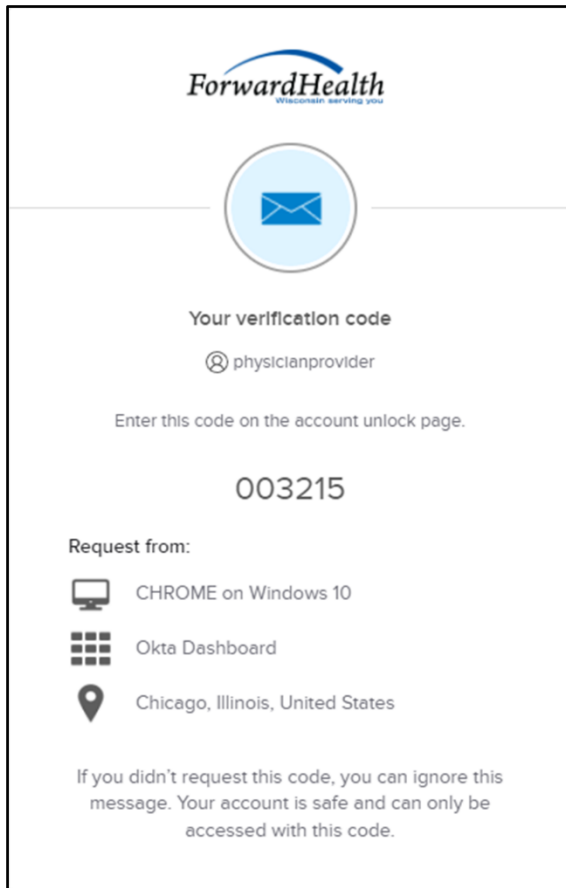
- The email sent to the user's email address includes an **Unlock Account** link (Option 1) and a verification code (Option 2).



**Figure 42** One-Time Verification Code Email

- 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.

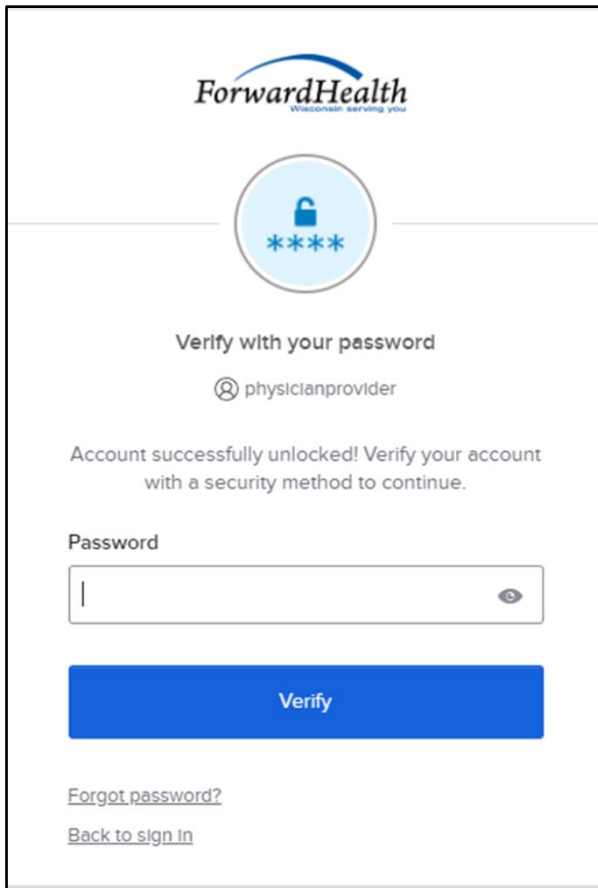


**Figure 43** Verification Code Box

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



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



**Figure 44** Verification Code Box

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

## 3.4 Account Types

Three different account types are available through the ForwardHealth 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.

## 4 Clerk Maintenance

If more than one person will be working on the account, clerk accounts must be established by the Administrator or Clerk Administrator.

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

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

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

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

Figure 45 Clerk Maintenance Search Panel

Through the Clerk Maintenance panels, users with administrative and clerk administrative accounts can search for, add, or remove clerks.

### 4.1 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.

Figure 46 Search Criteria Section

2. Click **Search**.
3. Click the row containing the clerk’s name in the “Search Results” section.

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

Figure 47 Search Results Section

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

Figure 48 Search Results and Selected Clerk Sections

## 4.2 Add a Clerk

The Add Clerk function allows the user to add new clerks.

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

The screenshot shows the 'Clerk Account' panel. At the top, it states 'Required fields are indicated with an asterisk (\*)' and provides a password requirement: 'Password must contain one uppercase letter, one number, and at least 8 characters.' The panel is divided into two main sections: 'Clerk Details' and 'Clerk Roles'. The 'Clerk Details' section contains the following fields: 'User Name\*' with a search button, 'Contact First Name\*', 'Contact Last Name\*', 'Telephone Number\*' with an 'Ext.' field, 'E-Mail\*', 'Confirm E-Mail\*', 'Password\*', and 'Confirm Password\*'. The 'Clerk Roles' section has two columns: 'Available Roles' (containing 'Evv') and 'Assigned Roles' (empty). Between the columns are navigation buttons: '<', '<<', '>', and '>>'. At the bottom left of the 'Clerk Roles' section is a checkbox labeled 'Clerk Administrator'. At the bottom right of the panel are three buttons: 'Previous', 'Submit', and 'Cancel'.

Figure 49 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.

Figure 50 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.

Figure 51 Search Results Section

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

Figure 52 Clerk Account Information Auto-populated on Clerk Account Panel

## 4.3 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.

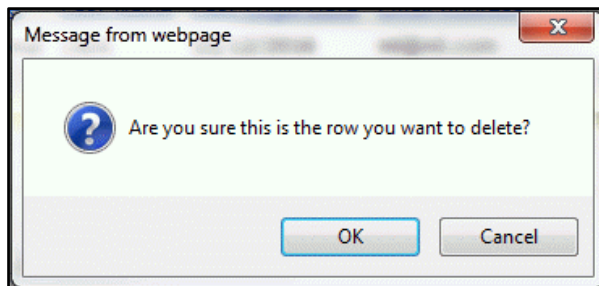


Figure 53 Dialog Box

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



Figure 54 Confirmation Message

## 4.4 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 ForwardHealth Portal. MFA will protect ForwardHealth 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 ForwardHealth Portal at <https://www.forwardhealth.wi.gov/>.

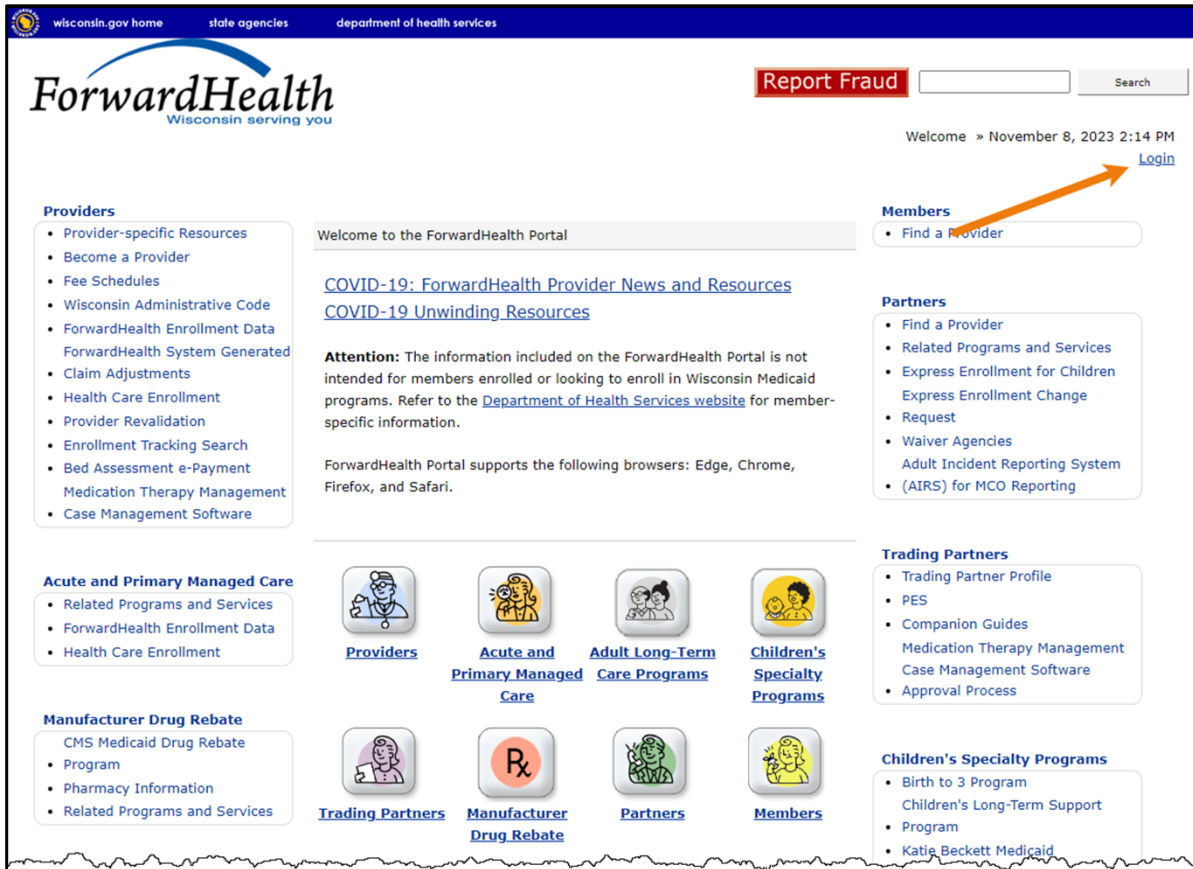
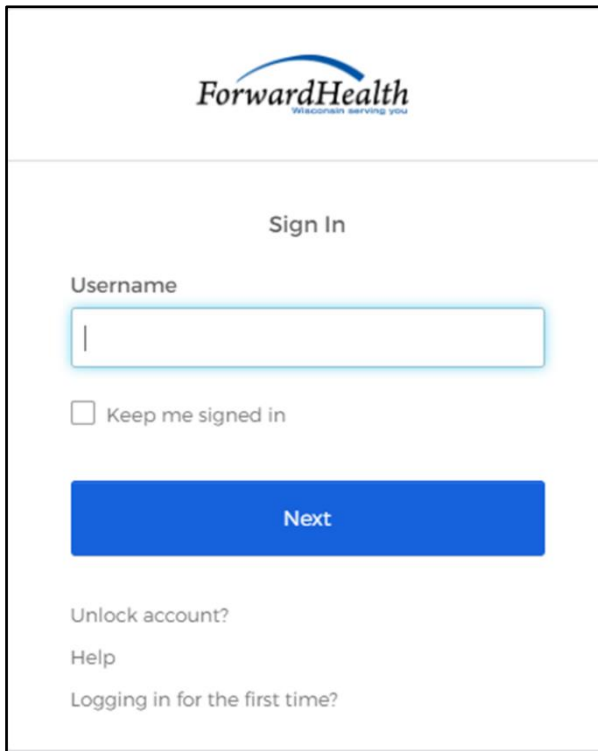


Figure 55 ForwardHealth Portal Page



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



ForwardHealth  
WISCONSIN serving you

Sign In

Username

Keep me signed in

Next

[Unlock account?](#)

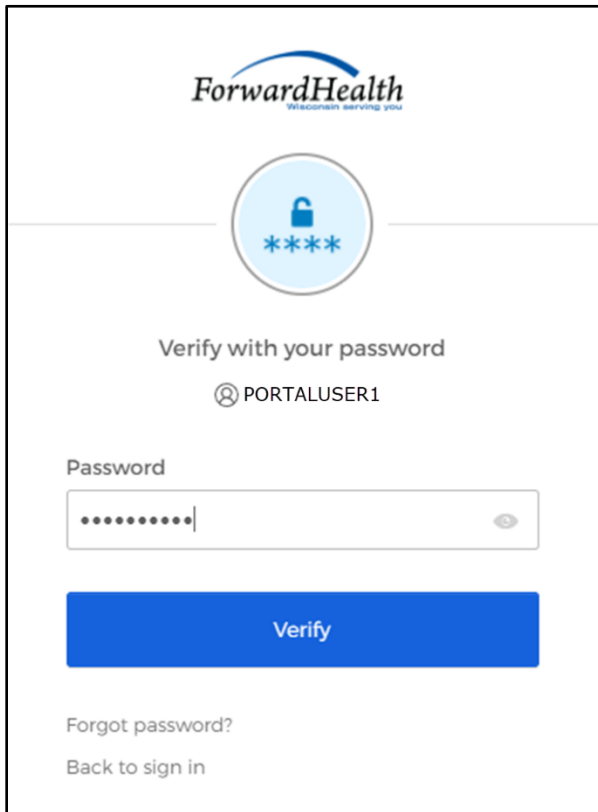
[Help](#)

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

**Figure 56** Sign In Box

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

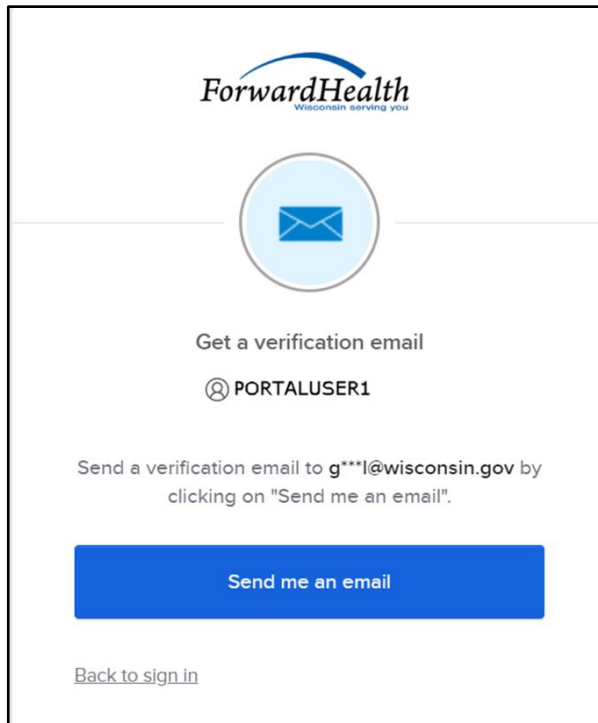
A Verify with your password box will be displayed.



**Figure 57** Verify With Your Password Box

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

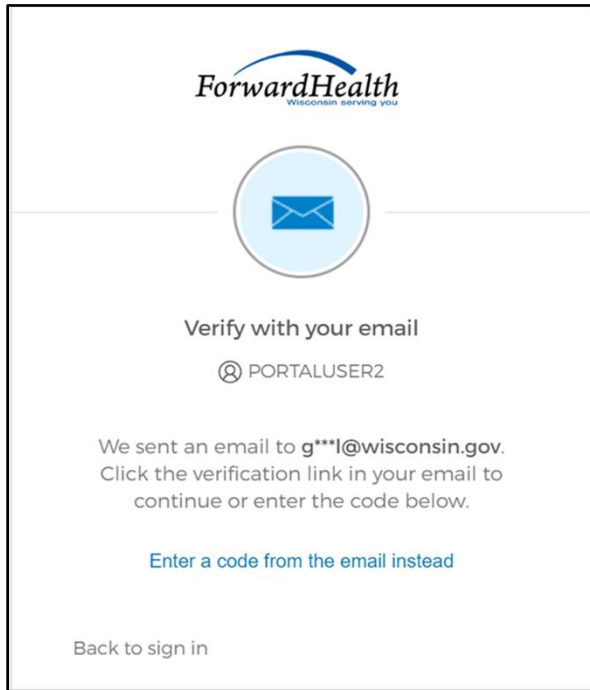
A Get a verification email box will be displayed. Note: If the user's password expires when setting up MFA, a change password box will be displayed, and the user will be prompted to enter and re-enter their new password.



**Figure 58** 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 59** 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).

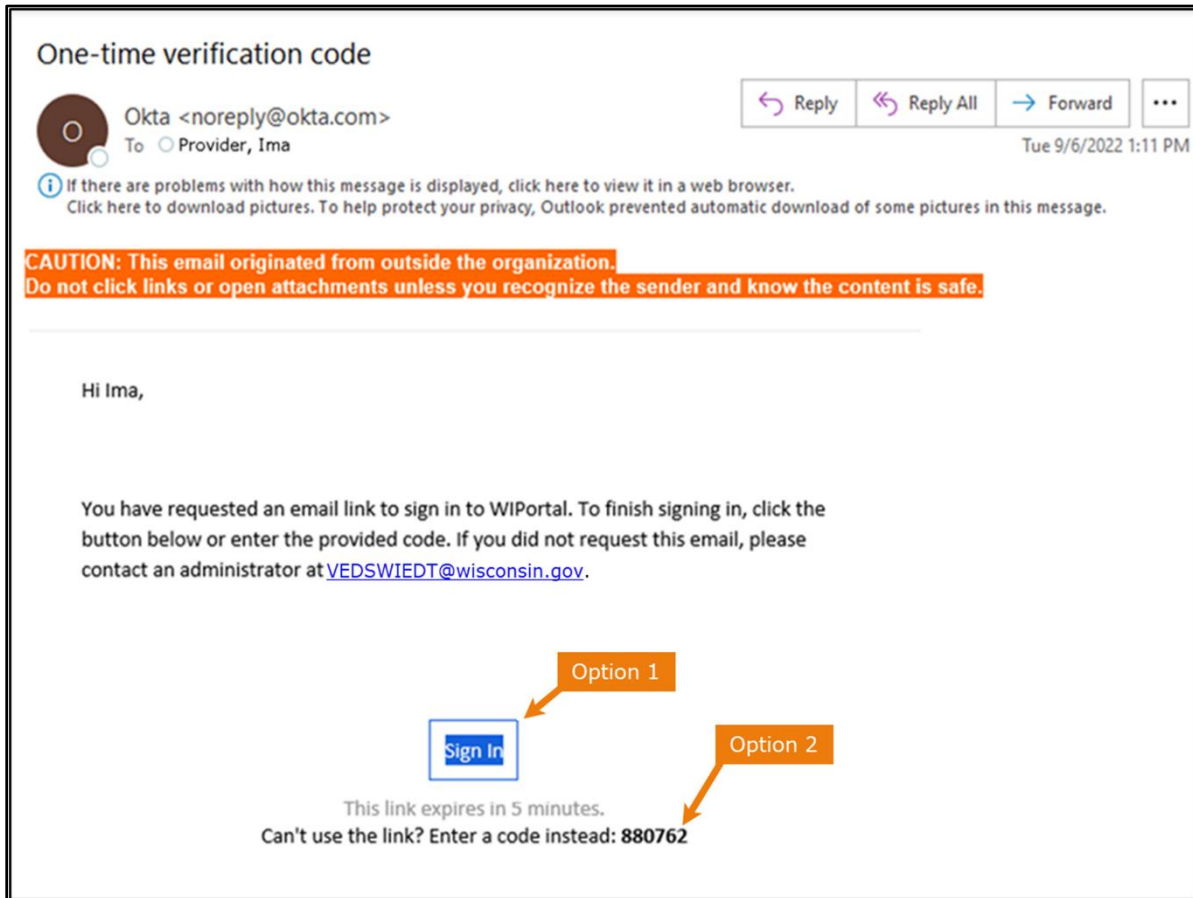
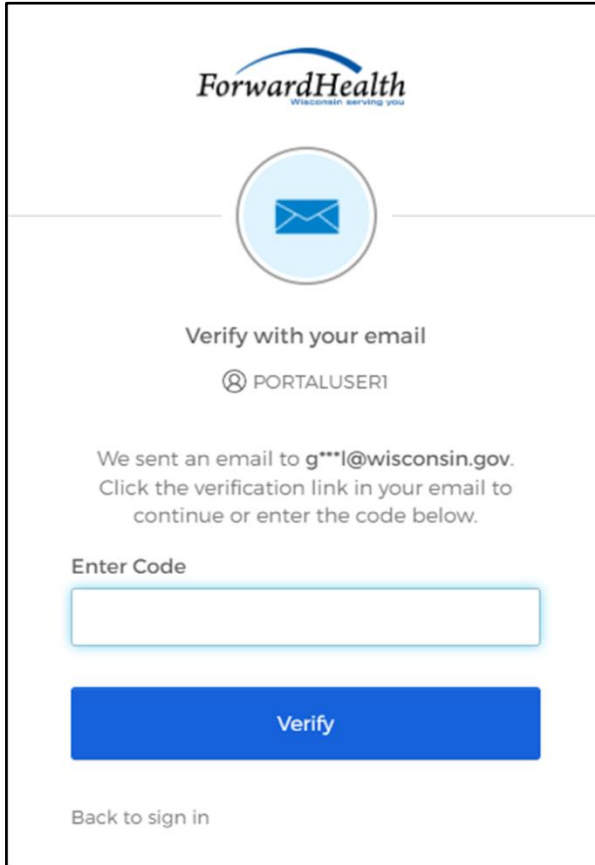


Figure 60 One-Time Verification Code Email

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.

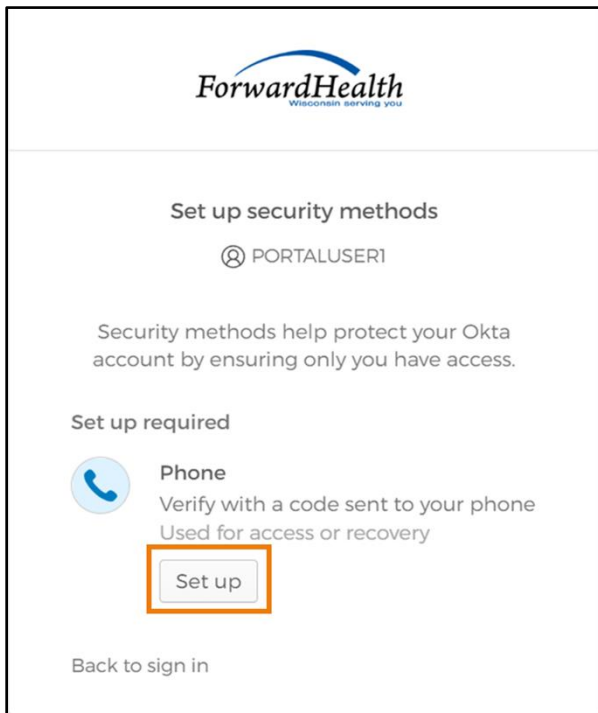
Enter Code

Verify

[Back to sign in](#)

**Figure 61** Verify With Your Email Box

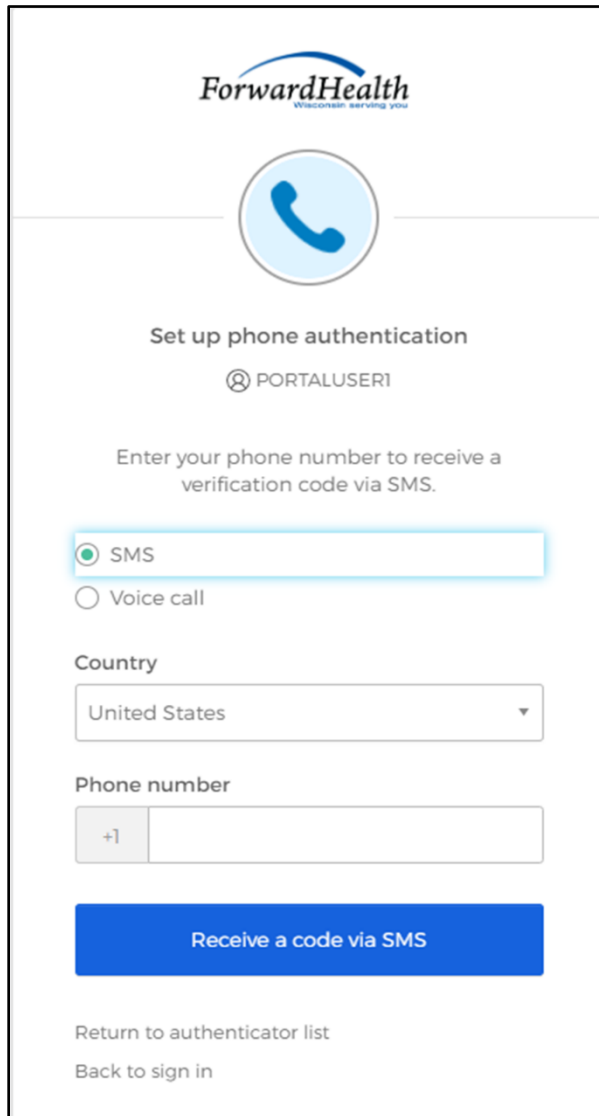
A Set up security methods box will be displayed.



**Figure 62** Set Up Security Methods Box

10. Click **Set up**.

A Set up phone authentication box will be displayed.



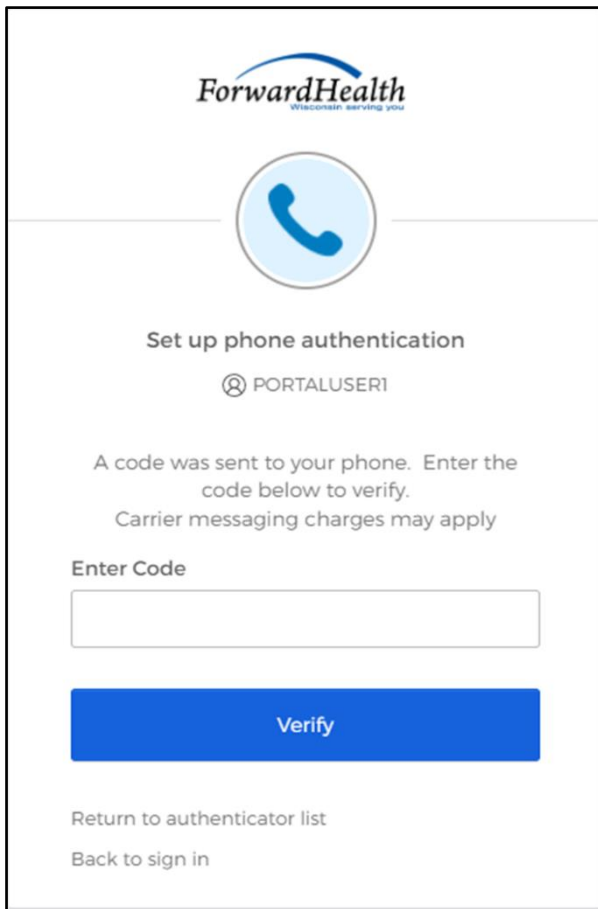
The screenshot shows a web form for setting up phone authentication. At the top is the ForwardHealth logo with the tagline 'Wisconsin, serving you'. Below the logo is a circular icon of a telephone handset. The main heading is 'Set up phone authentication' followed by the user ID 'PORTALUSER1'. The instruction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

**Figure 63** 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.



**Figure 64** 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 ForwardHealth Portal.

## 5 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.

The screenshot shows a web application window titled "Clerk Last Logon". The window has a dark header bar with the title and a help icon. Below the header, there are two main sections. The first section, "Search Criteria", contains a radio button selection for "Number of Days since Logon\*" with options "60 Days" (selected), "90 Days", and "120 Days". Below this are three text input fields for "First Name", "Last Name", and "User Name". To the right of these fields are "Search" and "Cancel" buttons. The second section, "List of clerks", contains a message: "\*\*\* No rows found \*\*\*". At the bottom of the panel are "Remove selected Clerks" and "Cancel" buttons.

Figure 65 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.

### 5.1 Search and Remove a Clerk Account

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

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

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

**Clerk Last Logon**

**Search Criteria**

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

First Name

Last Name

User Name

Search Cancel

Figure 66 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 67 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 ForwardHealth Portal.

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

# 6 EVV Demographic Maintenance Tool

The EVV demographic maintenance tool on the ForwardHealth 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 ForwardHealth Portal at [www.forwardhealth.wi.gov/](http://www.forwardhealth.wi.gov/).

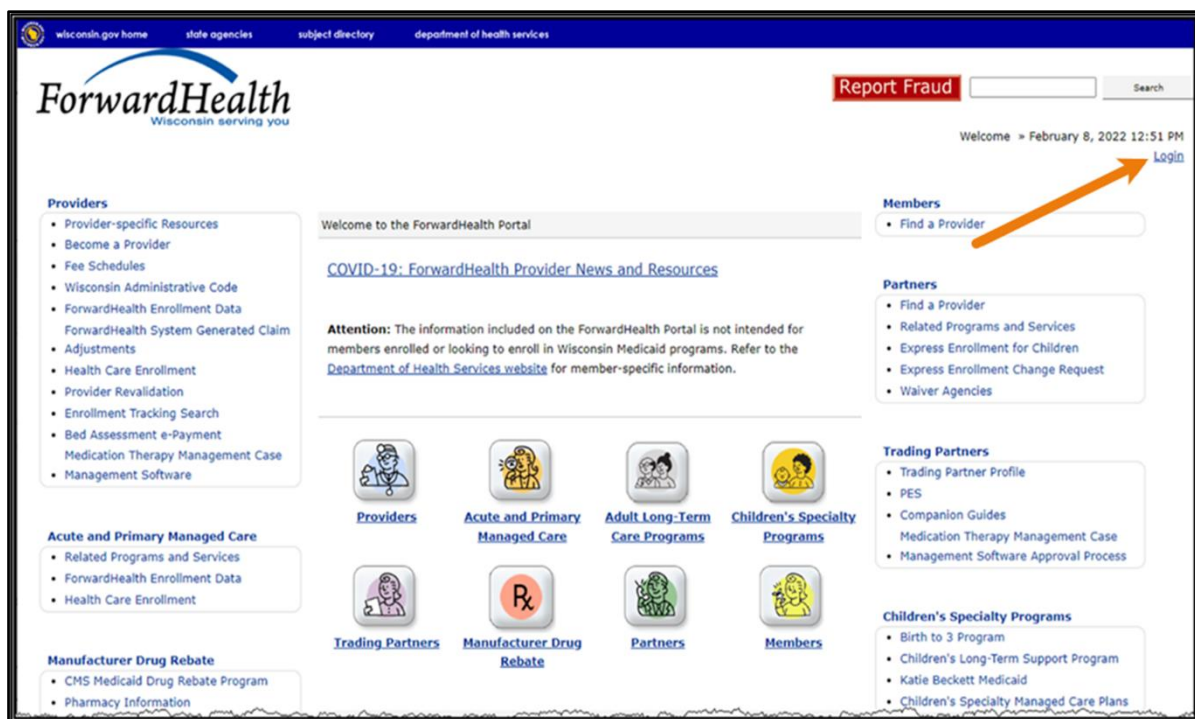
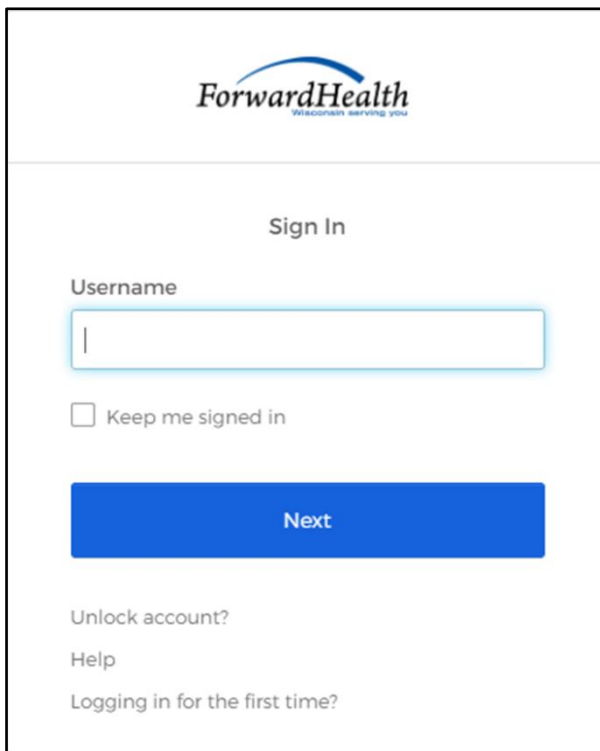


Figure 68 ForwardHealth Portal Homepage

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



ForwardHealth  
WISCONSIN serving you

Sign In

Username

Keep me signed in

Next

[Unlock account?](#)

[Help](#)

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

**Figure 69** Sign-In Box

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

A Verify with your password box will be displayed.

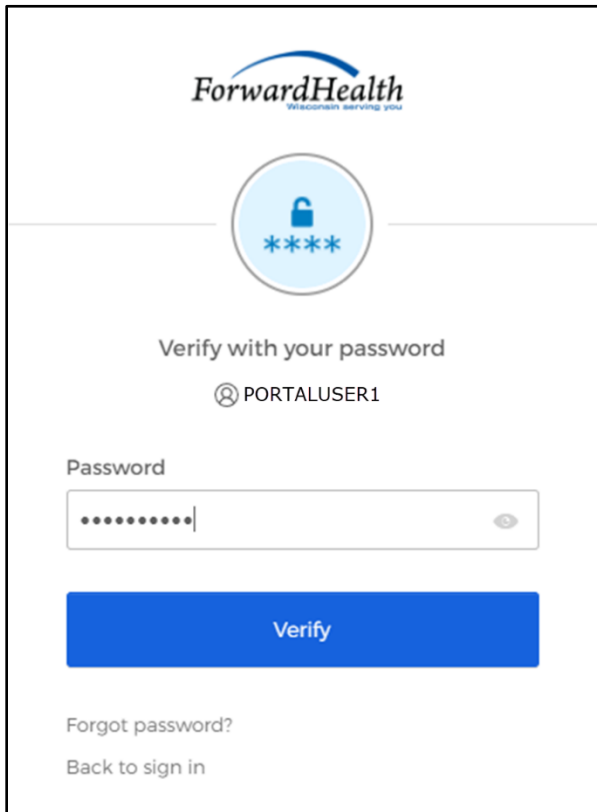


Figure 70 Verify With Your Password Box

5. Enter the user’s password.
6. Click **Verify**. The secure Provider page will be displayed.

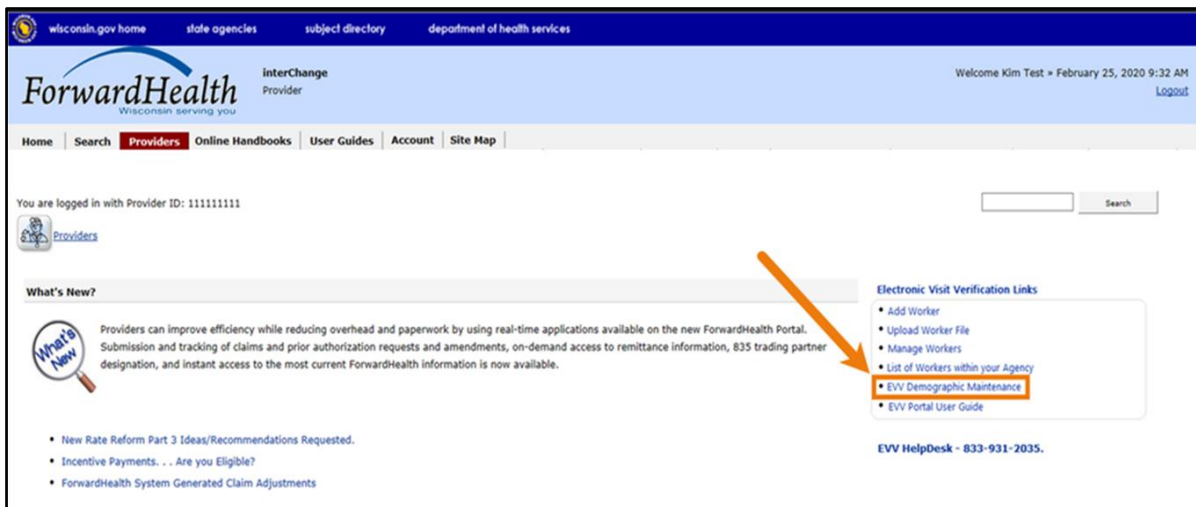
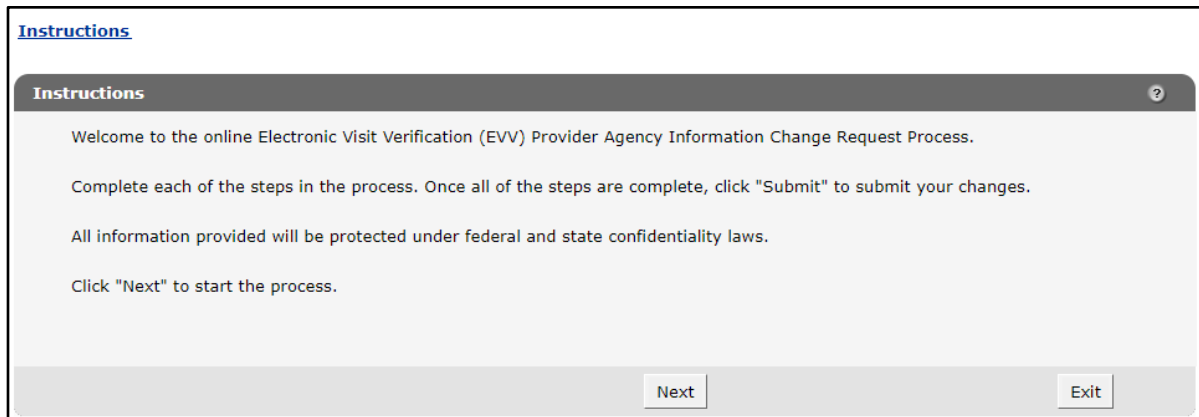


Figure 71 Secure Provider Page

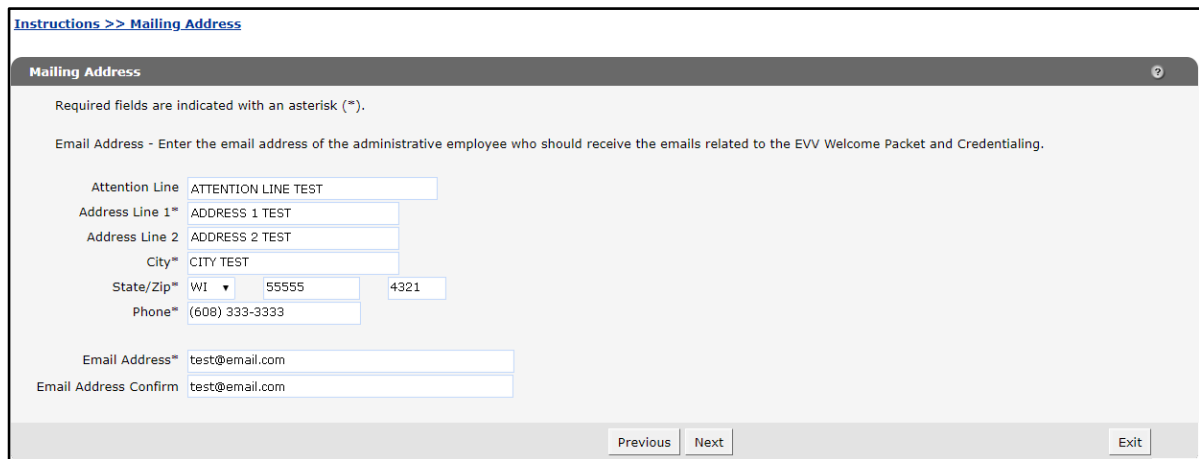
- Click **EVV Demographic Maintenance**. The Instructions panel will be displayed.



The screenshot shows a web interface titled "Instructions" with a blue link at the top left. Below the title is a dark grey header bar with the word "Instructions" and a question mark icon. The main content area contains the following text: "Welcome to the online Electronic Visit Verification (EVV) Provider Agency Information Change Request Process.", "Complete each of the steps in the process. Once all of the steps are complete, click 'Submit' to submit your changes.", "All information provided will be protected under federal and state confidentiality laws.", and "Click 'Next' to start the process." At the bottom of the panel, there are two buttons: "Next" and "Exit".

**Figure 72** Instructions Panel

- Read the instructions and then click **Next**. The Mailing Address panel will be displayed. The user's mailing address information will be populated in the fields.



The screenshot shows a web interface titled "Mailing Address" with a blue link at the top left. Below the title is a dark grey header bar with the word "Mailing Address" and a question mark icon. The main content area contains the following text: "Required fields are indicated with an asterisk (\*)", "Email Address - Enter the email address of the administrative employee who should receive the emails related to the EVV Welcome Packet and Credentialing.", and a form with the following fields: "Attention Line" (ATTENTION LINE TEST), "Address Line 1\*" (ADDRESS 1 TEST), "Address Line 2" (ADDRESS 2 TEST), "City\*" (CITY TEST), "State/Zip\*" (WI, 55555, 4321), "Phone\*" ((608) 333-3333), "Email Address\*" (test@email.com), and "Email Address Confirm" (test@email.com). At the bottom of the panel, there are three buttons: "Previous", "Next", and "Exit".

**Figure 73** Mailing Address Panel

- Delete any information that needs to be changed and enter the new information.

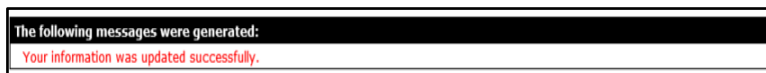
Any changes to the mailing address on file with ForwardHealth may alter the zip+4 code information required on transactions. Users should verify the zip+4 code for the address on the [U.S. Postal Service website](#).

Important provider information about EVV from the DHS EVV team will be sent to the email provided.

- Click **Next**. The Tax Information and Submit panel will be displayed. The user’s tax information will be populated in the fields.

**Figure 74** Tax Information and Submit Panel

- Delete the information that needs to be changed and enter the new information.  
 Note: Information in the 1099 Address section can only be changed after changing the TIN.
- Once all necessary changes have been made, click **Submit**. A confirmation message will be displayed.



**Figure 75** Confirmation Message

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



# 7 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 ForwardHealth Portal by using the Add Worker or Upload Worker File links. These links are displayed under the Quick Links or Electronic Visit Verification sections of their secure ForwardHealth Provider Portal account. 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](#).

Note: On their secure Provider page, EVV providers will only have access to the EVV links located under the Quick Links section. These links are displayed in the upper right side of the secure provider page.

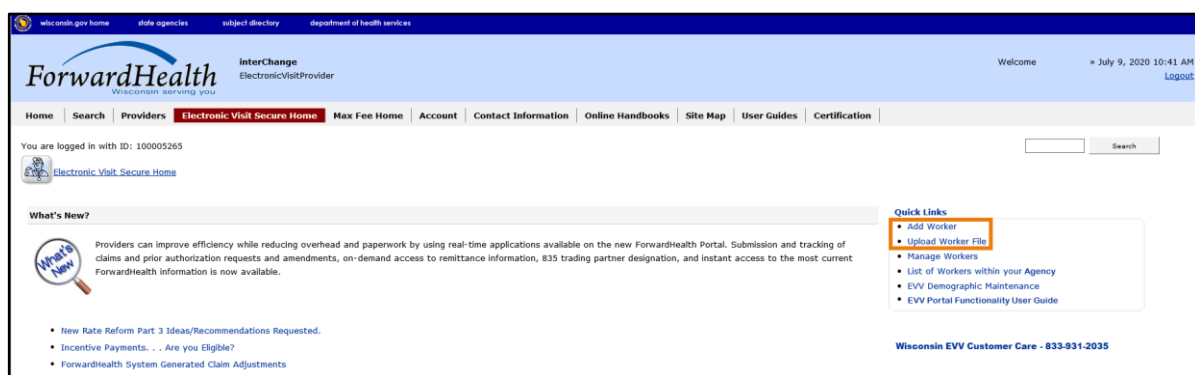


Figure 76 Secure Provider Page—EVV Provider

Medicaid-enrolled providers will have access to the links located under the Home Page, Quick Links, and Electronic Visit Verification Links sections. The EVV links are displayed on the bottom right side of the secure Provider page under the Electronic Visit Verification Links section.

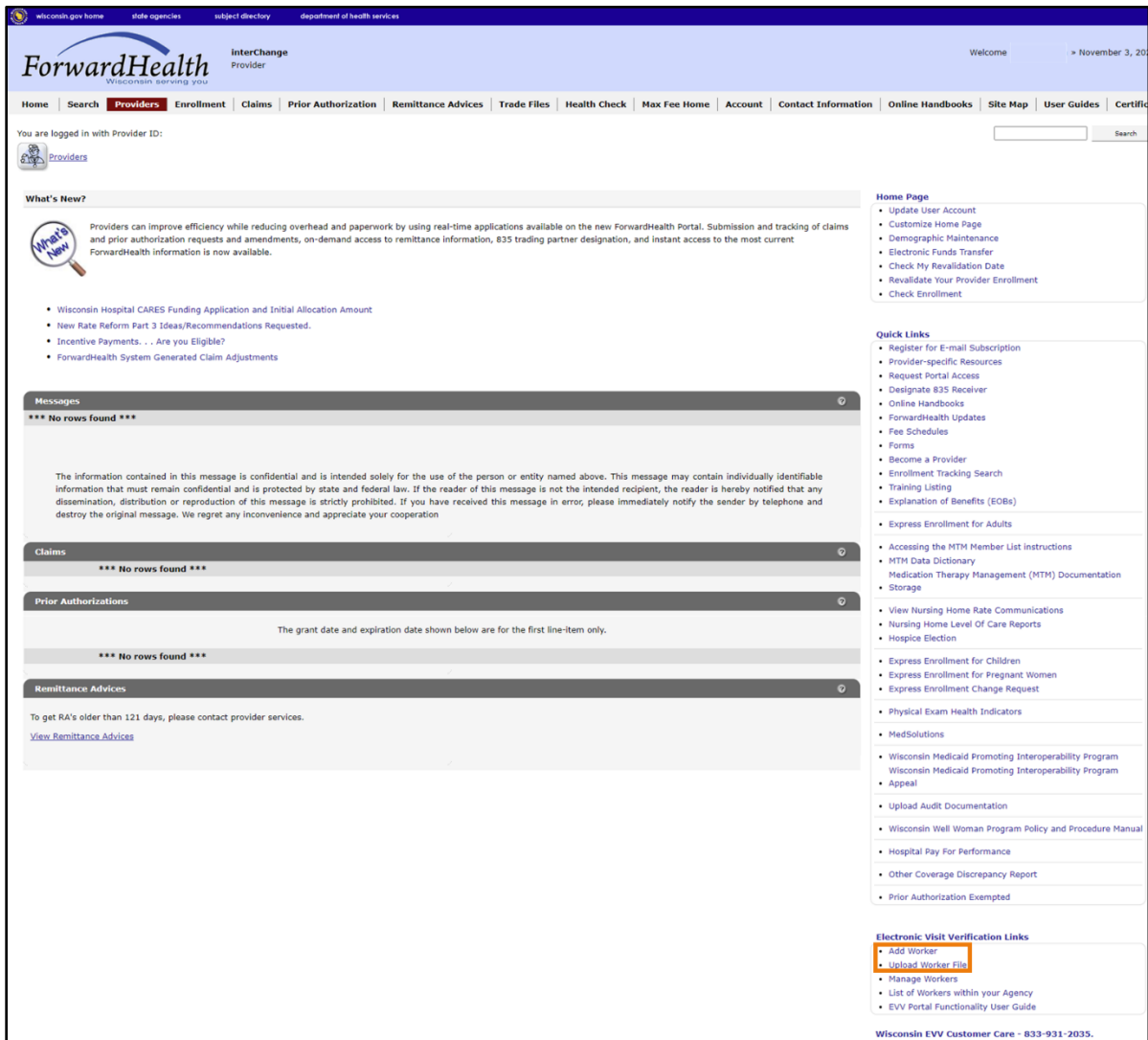


Figure 77 Secure Provider Page—Medicaid-Enrolled Provider

## 7.2 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. On the secure Provider page, click **Add Worker**. 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)

**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 \*\*

**Figure 78** 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.

## 7.2.1 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 79** Add Worker Panel With “Worker Search Results” Section

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

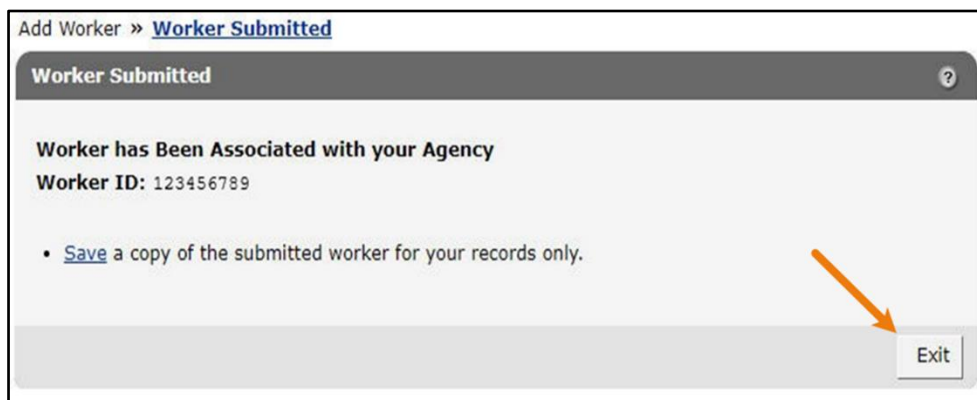
- First Name
- Middle Initial
- Last Name
- Social Security Number
- Date of Birth (in MM/DD/YYYY format)
- Gender (optional)

- 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 ForwardHealth 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 80** 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.

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

### 7.2.2 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 ForwardHealth 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.

1. Click on 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**

<a href="#">Worker ID</a>	<a href="#">First Name</a>	<a href="#">MI</a>	<a href="#">Last Name</a>	<a href="#">Date Of Birth</a>	<a href="#">SSN</a>
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 81** 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 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 ForwardHealth Portal.

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



**Figure 82** 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.

## 7.3 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. On the secure Provider page, click **Upload Worker File**. The Upload Worker File panel will be displayed.



**Figure 83** 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 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 have been entered in the ForwardHealth 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.

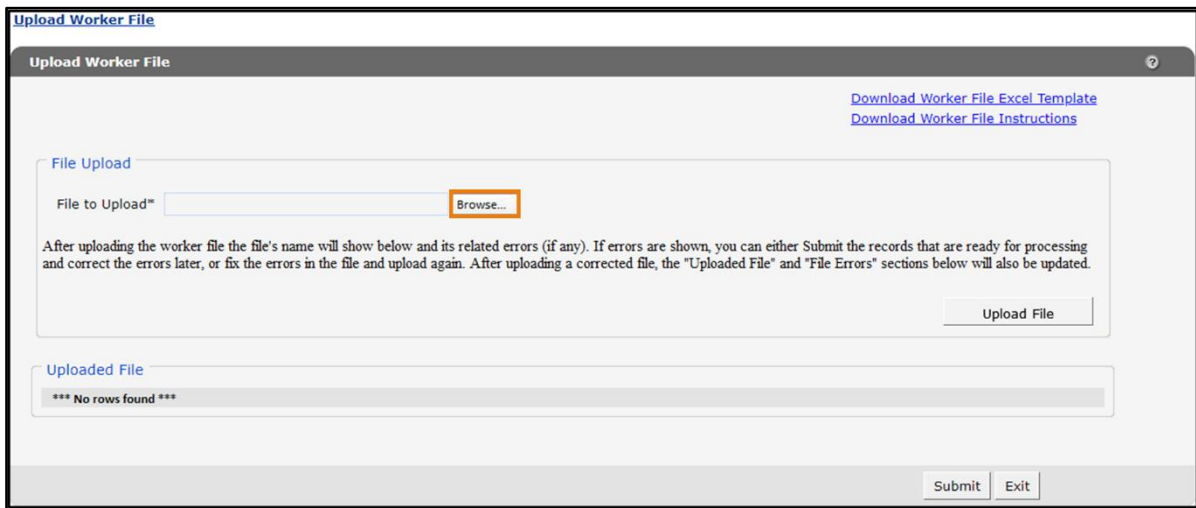
Fields in bold are required.



	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

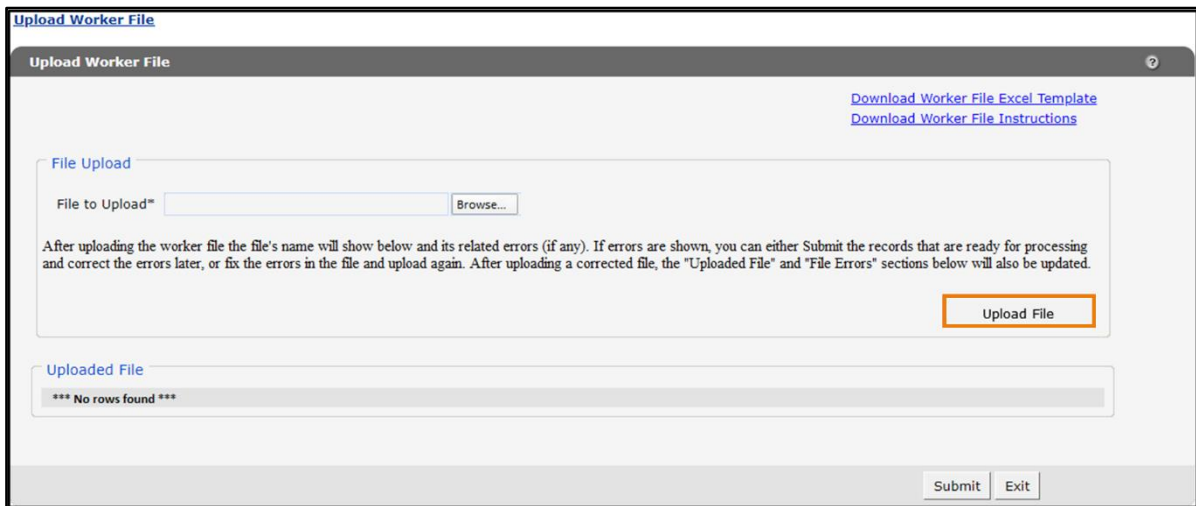
**Figure 84** Download Worker File Excel Template

- 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 85** 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 86** Upload Worker File Panel

10. Once uploading is complete, the panel will be refreshed, and the name of the field 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\*

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.

**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

**Figure 87** 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:

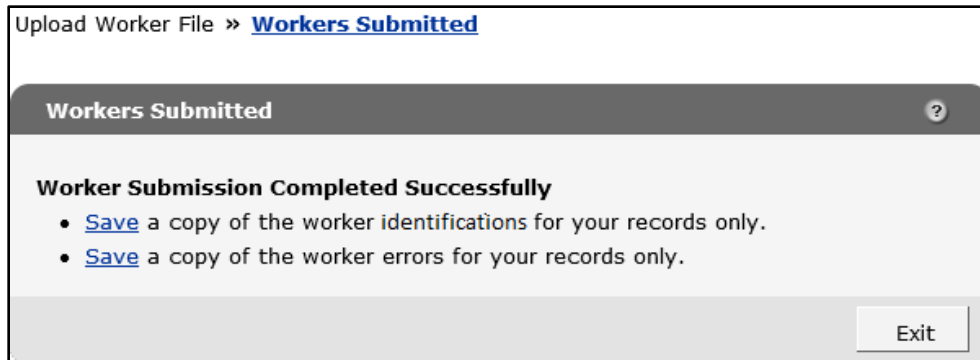
- The first option is to correct the errors in the file immediately and re-upload it.

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 88** 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.

## 8 Manage Workers

Providers can manage their workers' email address and association to the provider on the ForwardHealth Portal using the Manage Workers tool.

1. On the secure Provider page, click **Manage Workers** under the Quick Links menu located on the right side of the 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 89** 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 90 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.



The screenshot shows a form with the following elements:

- A text input field containing "drsmith@gmail.com" with a red asterisk to its left, labeled "Worker Email".
- A checkbox labeled "Update Worker Email" which is checked.
- A text input field labeled "New Worker Email".
- A text input field labeled "Confirm New Worker Email".

**Figure 91** 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.

- 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)

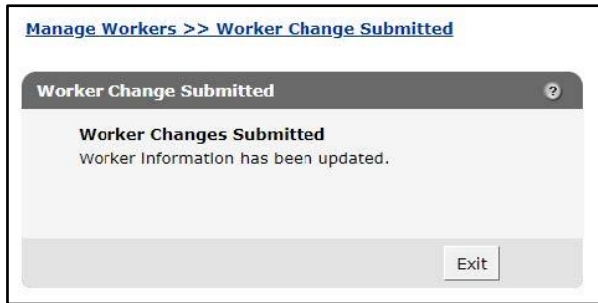
Worker End Date (i.e. 12/30/2020)\*

Exempt from EVV Requirements\*\*

**Figure 92** 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.

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



**Figure 93** Worker Change Submitted Panel

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



# 9 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. On the secure Provider page, click **List of Workers within your Agency** under the Quick Links menu located on the right side of the page. The List of Workers panel will display.



**Figure 94** 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 95** 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 96** List of All Active Workers