User Guide

Provider-Based Billing Retrieval

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WISCONSIN DEPARTMENT
of HEALTH SERVICES

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1 Introduction

This functionality allows users with the necessary role to retrieve provider-based billing summary reports through the secure area of the ForwardHealth Portal. Provider-based summary reports are available for users to download in .csv or .pdf format.

The provider-based billing process runs monthly on the first full weekend of every month and files are available once the process is completed.

For information about electronic payments, refer to the [ForwardHealth Portal Electronic Payment User Guide](#).

2 Access the Provider Based Billing Page
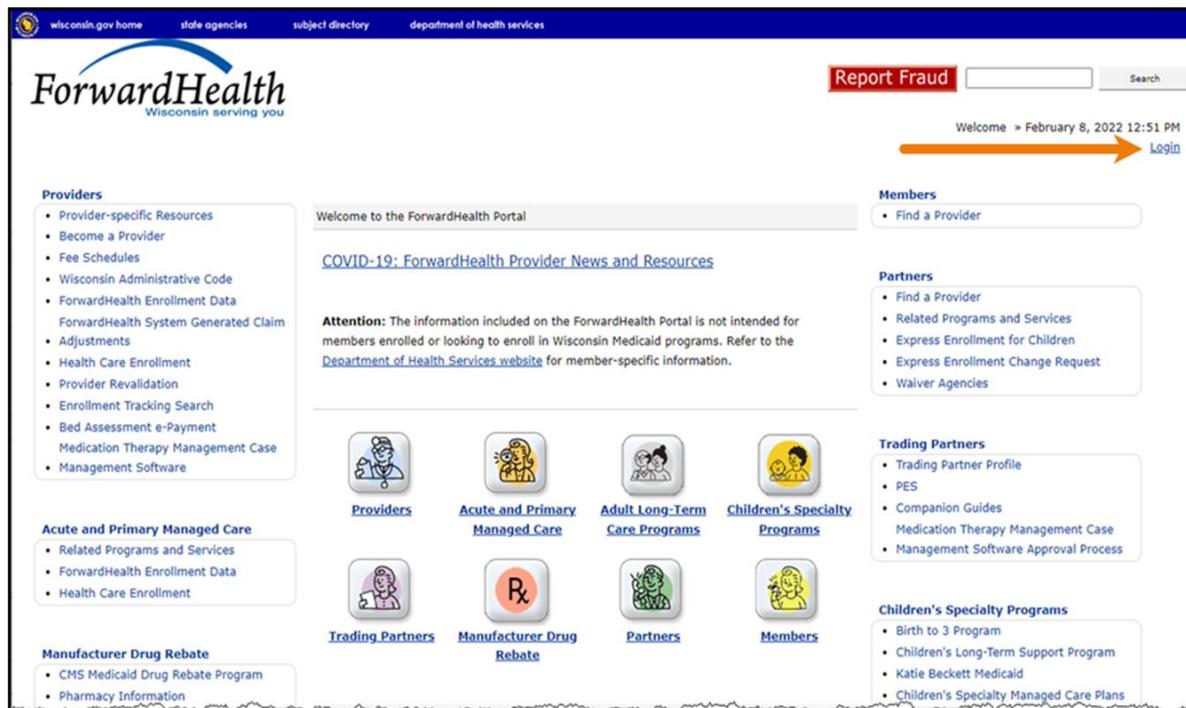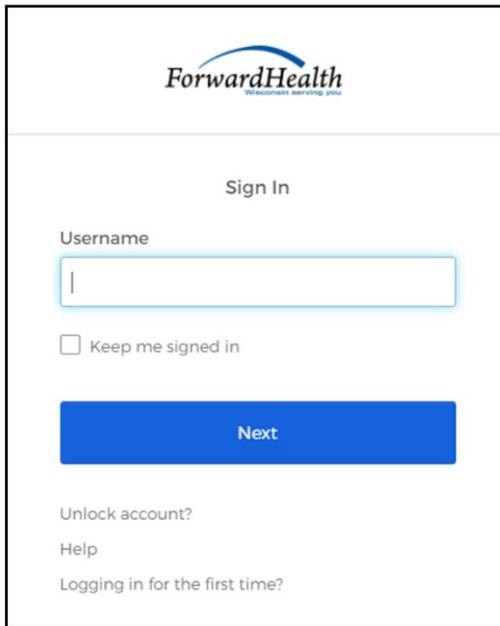
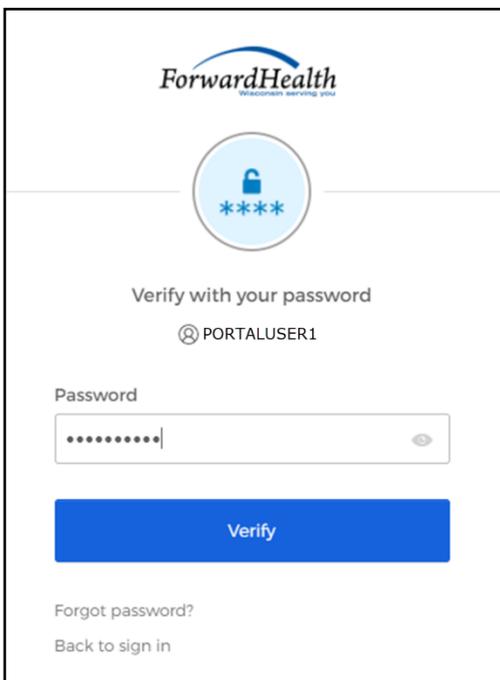1. Access the ForwardHealth Portal at https://www.forwardhealth.wi.gov/.

Figure 1 ForwardHealth Portal Page

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

Figure 2 Sign In Box

3. Enter the user's username.

4. Click **Next**. A Verify with your password box will be displayed.

Figure 3 Verify With Your Password Box

5. Enter the user's password.

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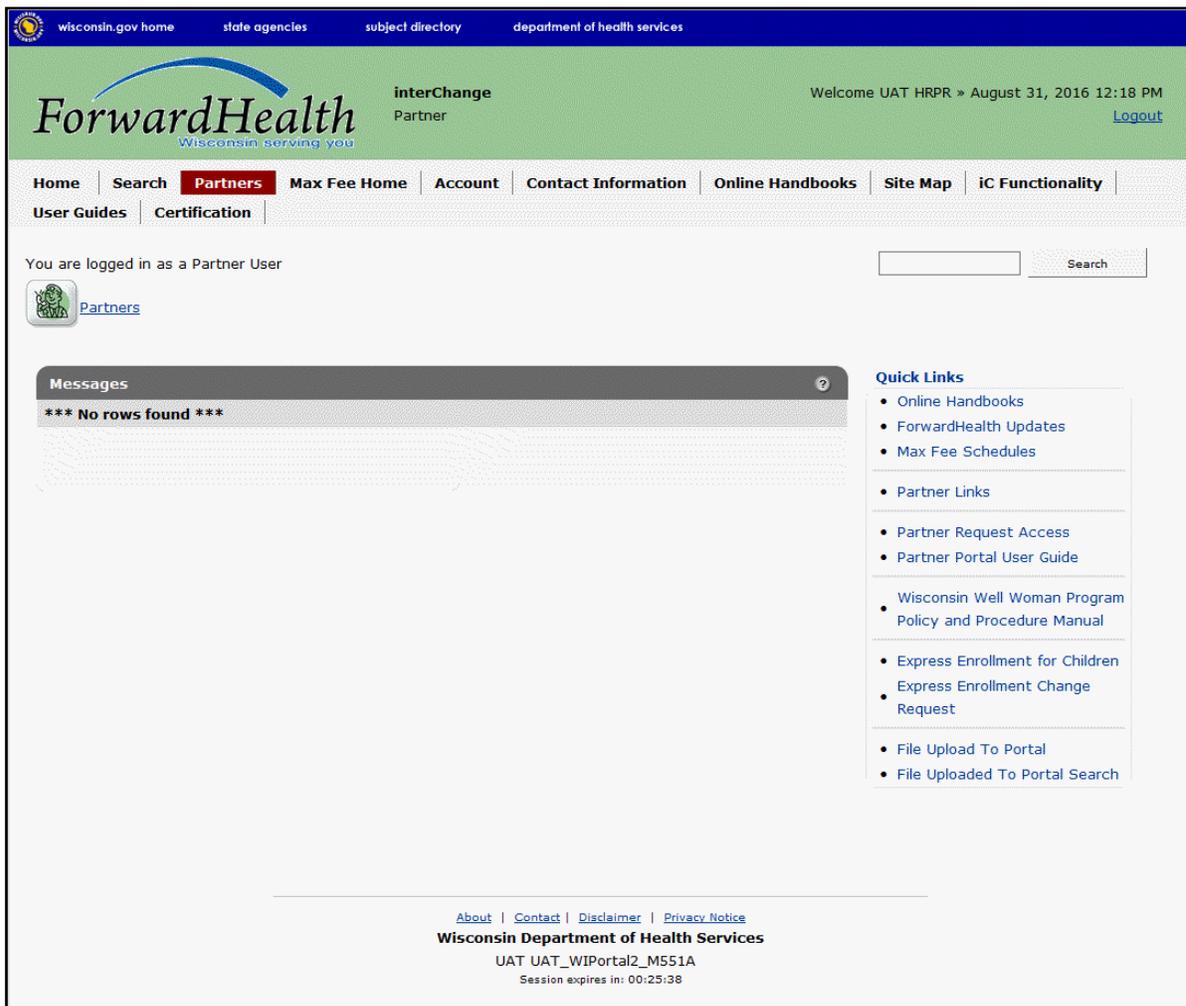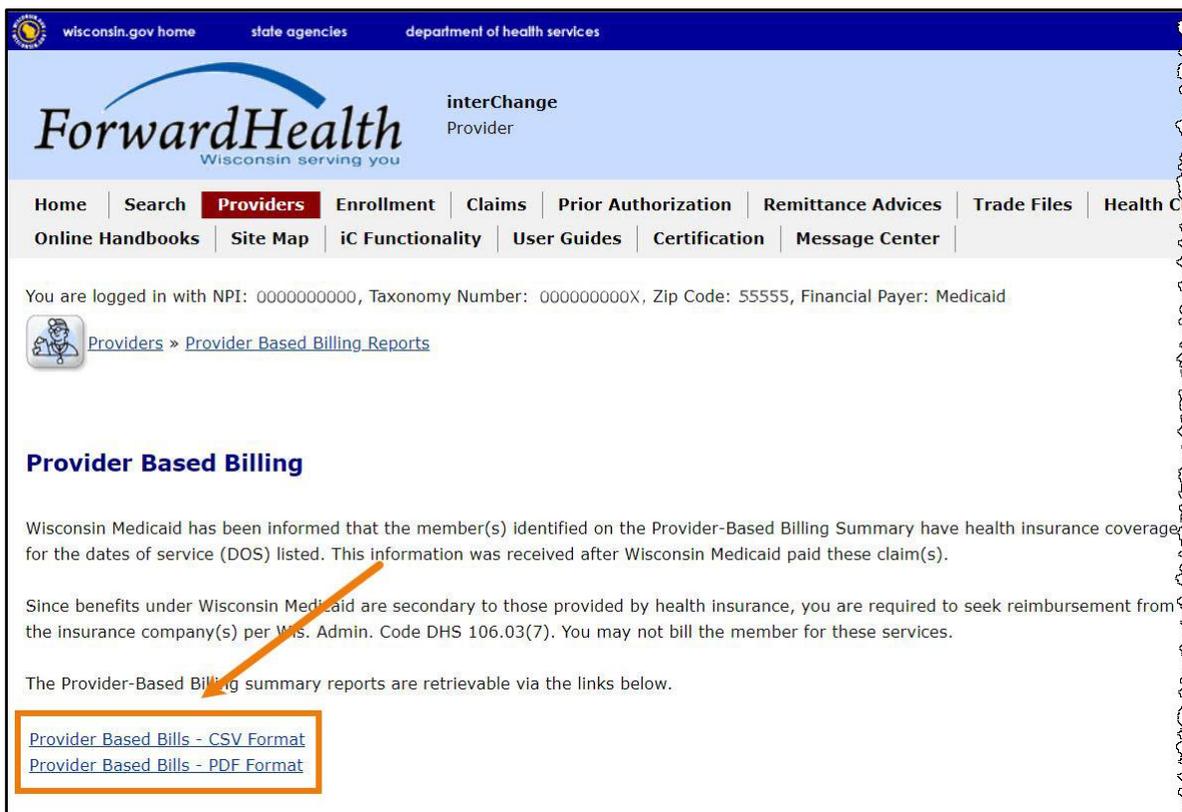

Figure 4 Secure Provider Page

7. Click **Provider Based Bills (PBB)** in the Quick Links box near the right side of the page. The Provider Based Billing page will be displayed.


Figure 5 Provider Based Bills (PBB) Page

Links to the OnBase provider-based billing summary reports are available under the Provider Based Billing heading.

Note: Provider-based billing summary reports are only available to admin users and clerks with the Prov Based Billing clerk role. If the user does not have the correct security role to access this functionality, they will receive an OnBase error message stating the document could not be loaded. If this user should have access and does not, the user should contact their administrator. Portal administrators should refer to the ForwardHealth Provider Portal Account User Guide for instructions on assigning roles in the Portal.

8. Proceed to the following sections to access provider-based billing summary reports in either .csv or .pdf format.

- Provider Based Bills—Comma-Separated Value Formatting

- Provider Based Bills—Portable Document Formatting

2.1 Provider Based Bills—Comma-Separated Values Format

1. Click the **Provider Based Bills—CSV Format** link from the Provider Based Bills page. The OnBase document viewer will open.
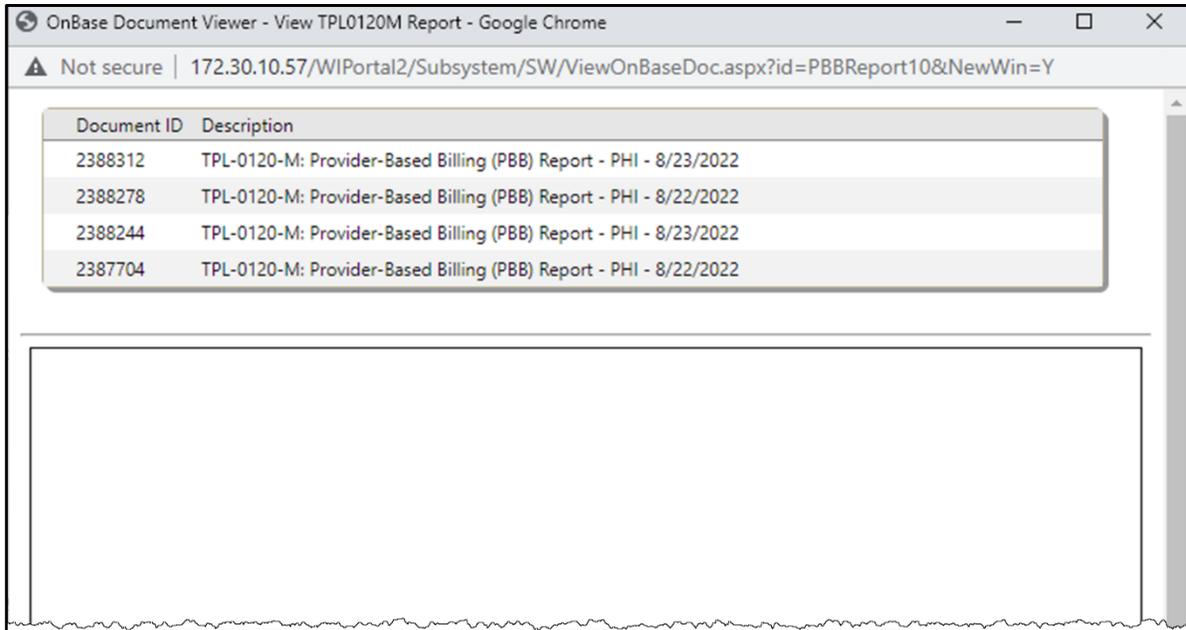

Figure 6 OnBase Document Viewer

2. Click the desired report. A file download icon will be displayed in the bottom left corner of the page, and the file will download directly to the user's default download file location. The user can view all recent downloads by clicking **Show all** in the bottom right corner of the page.
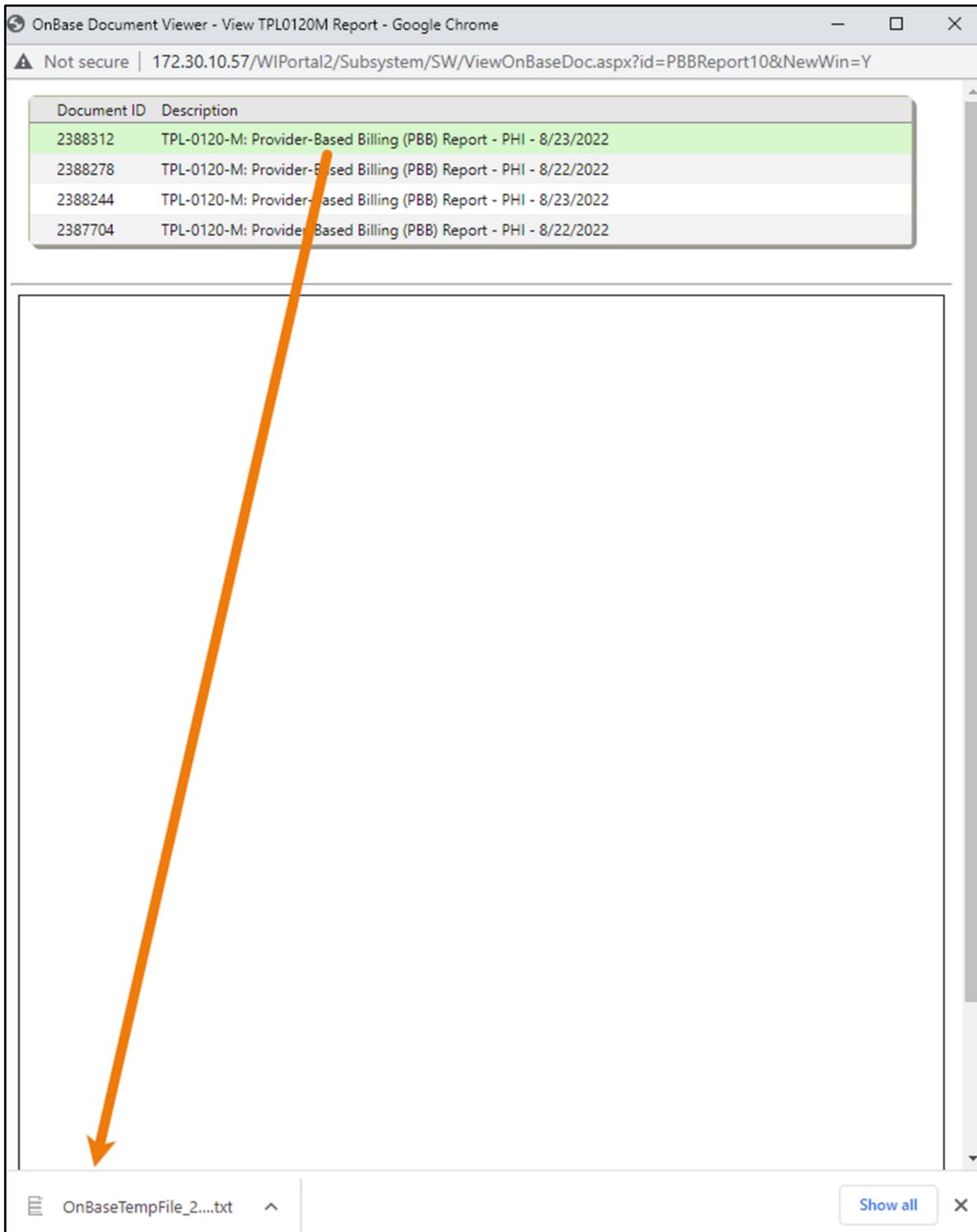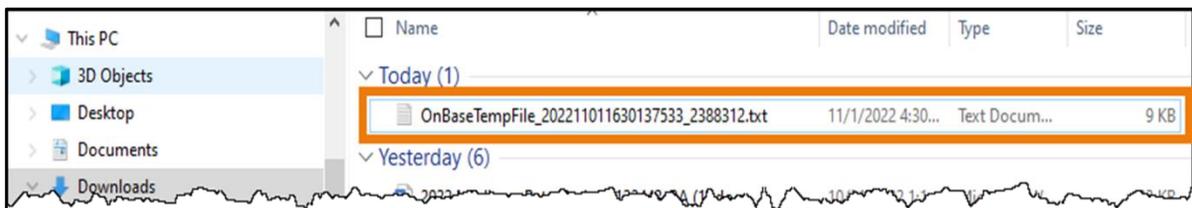

Figure 7 OnBase Document Viewer Window

3. Click the icon to open the file name ending in .txt to verify the .txt file generated is being retrieved in a format where the data is separated by commas.
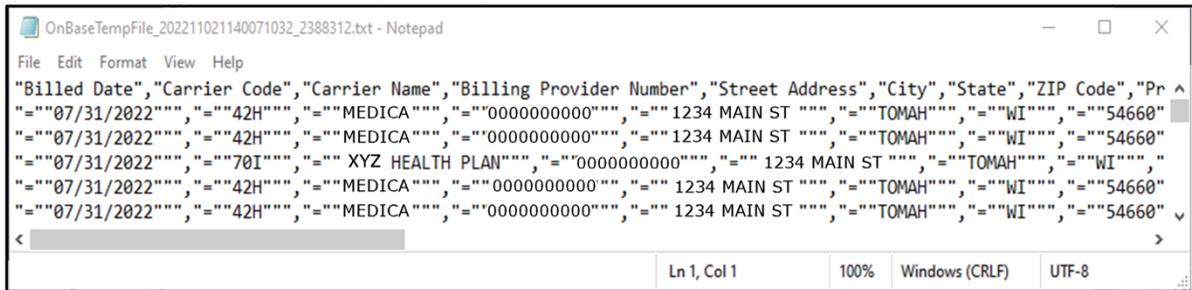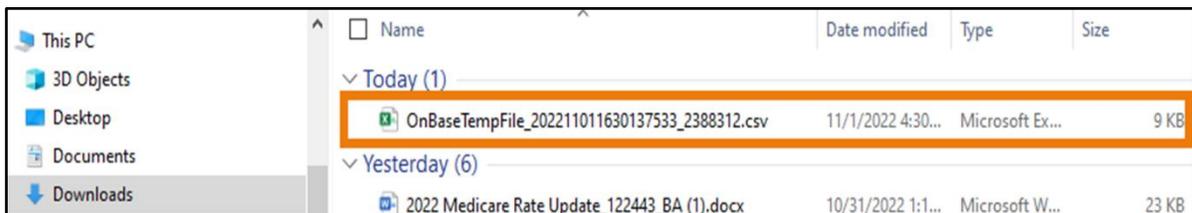

Figure 8 Comma-Separated Data

4. Close the file and navigate to the location in which the .txt file was downloaded.

5. Change the extension to ".csv."

Figure 9 Download File—.TXT Extension

Figure 10 Download File—.CSV Extension

6. Double-click to open the file. Note: The fields may need to be expanded to view all of the data, but the data should be separated correctly by cell.
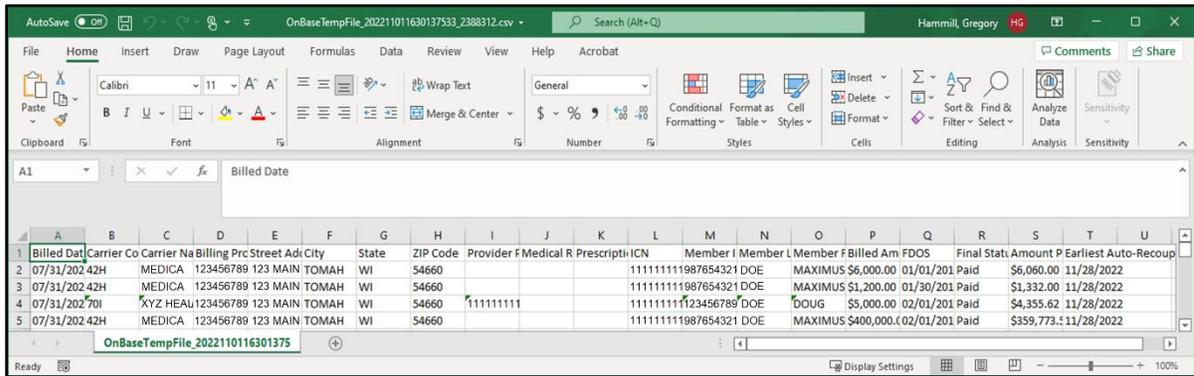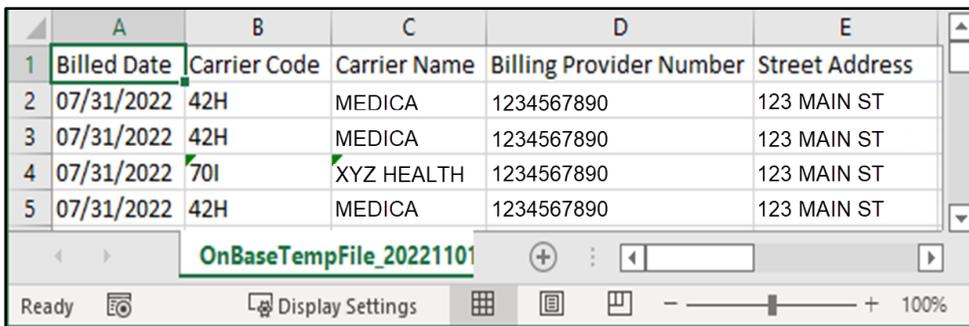

Figure 11 CSV Formatted File

Figure 12 Cell Width Expanded to Fit Data

2.2 Provider Based Bills—Portable Document Format

1. Click the **Provider Based Bills—PDF Format** link from the Provider Based Bills page. The OnBase document viewer will open.
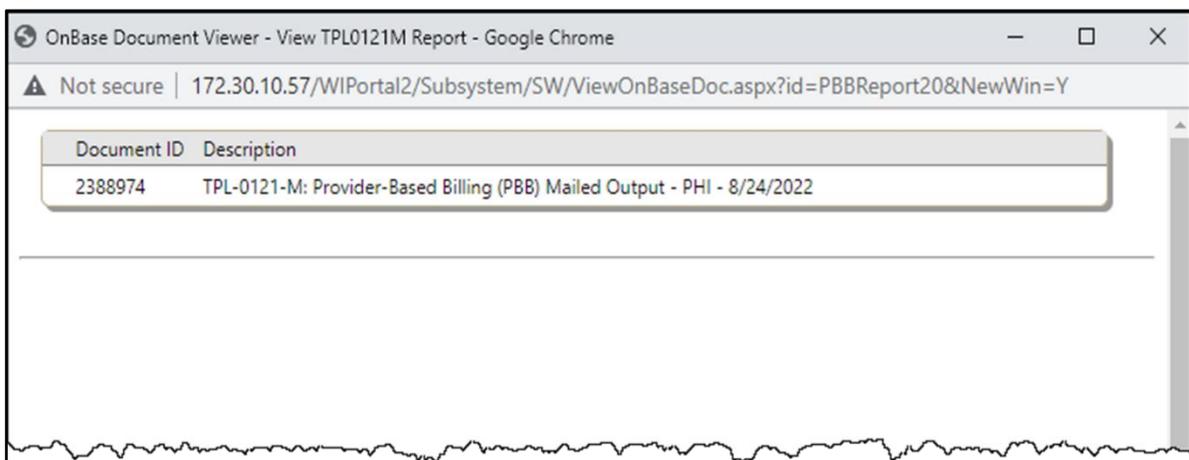

Figure 13 OnBase Document Viewer

2. Click the desired report. The PDF file with the provider-based billing information will be displayed.

3. Scroll down to view the provider-based billing summary report.
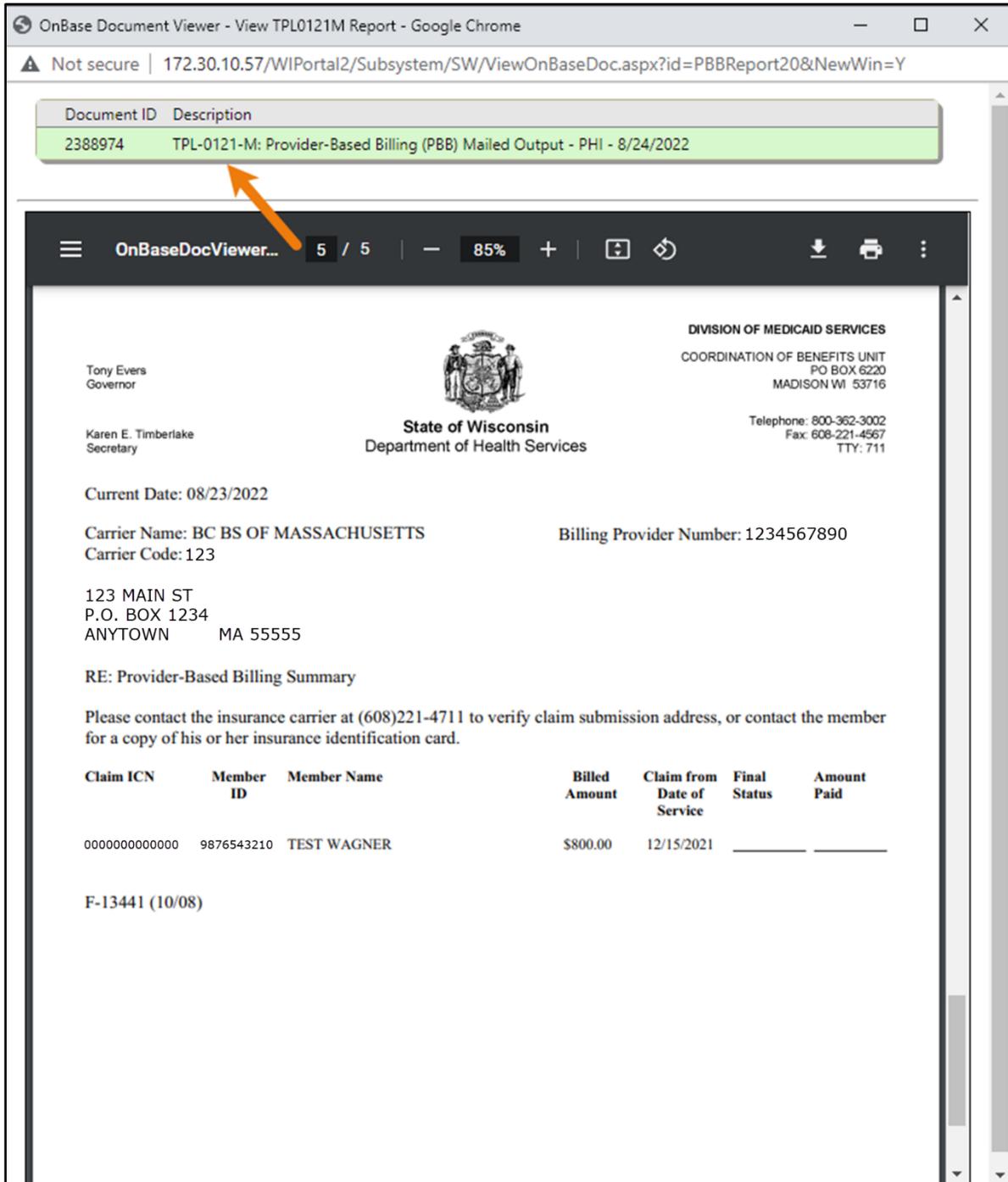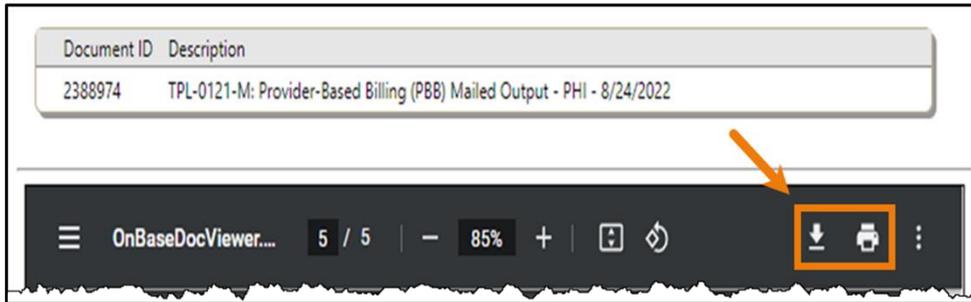

Figure 14 Provider-Based Billing Summary Report

4. The user can choose to download the report to their computer or print the report by clicking the icons in the upper right corner.

Figure 15 Download and Print Icons