

Instruction Sheet

ForwardHealth Portal Uploading Audit Documentation

March 11, 2024



WISCONSIN DEPARTMENT
of HEALTH SERVICES

Upload Audit Documentation

Providers may upload necessary audit documentation using the Upload Audit Documentation functionality on the ForwardHealth Portal.

For ease of access, the user will need to organize and name those files in the following suggested naming convention prior to uploading files to the Portal:

[Category]_Record

The **category** can be a provider's name, a member's name, or an employee's name. Related records can be split across multiple files, and numbered 1, 2, 3, etc. Refer to the following examples below:

JaneDoe_Record_1

JohnDoe_Record_2

JuneDoe_Record_3

Current maximum file size is 20 MB. There is no limit to the number of files that the user can upload.

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

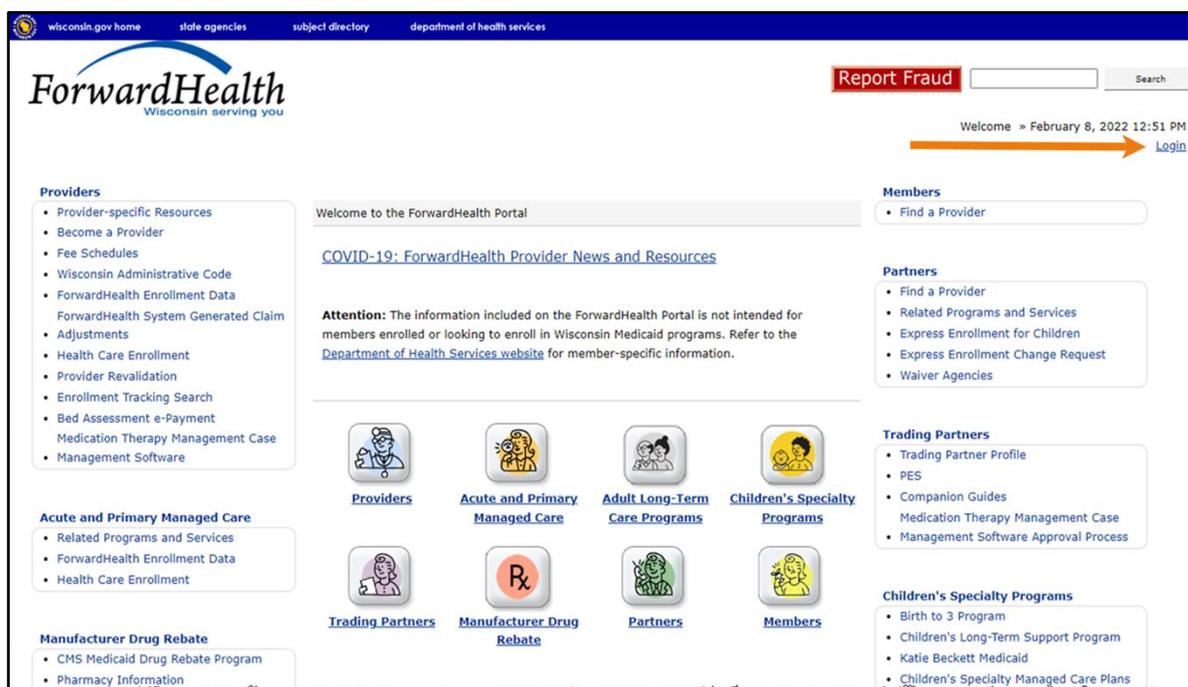
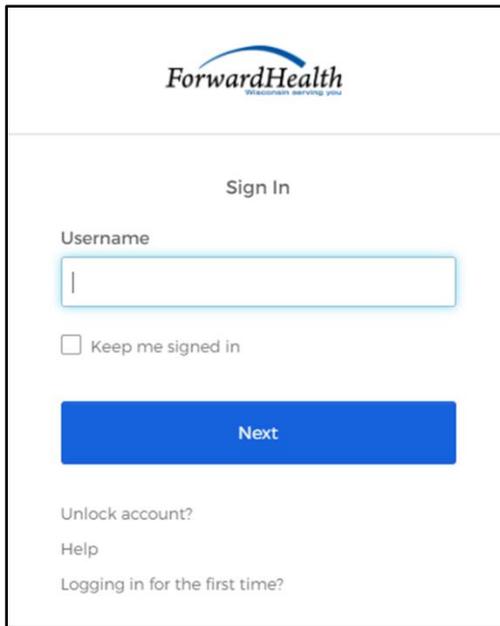


Figure 1 ForwardHealth Portal Page

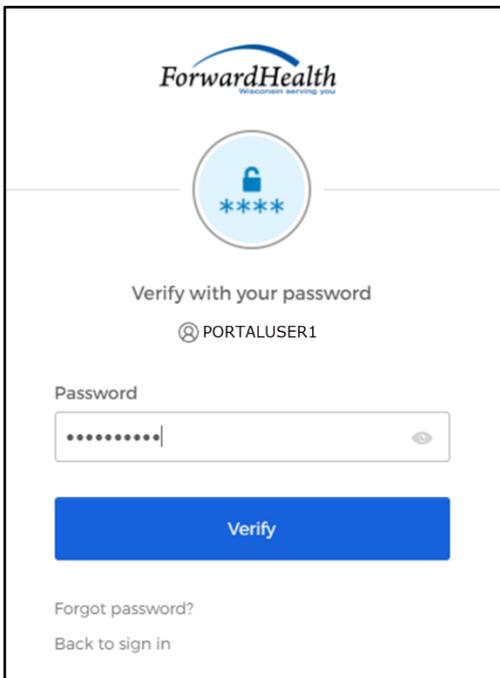
2. Click **Login**. A Sign In box will be displayed.



The screenshot shows the ForwardHealth logo at the top. Below it is the heading "Sign In". There is a "Username" label above a text input field. Below the input field is a checkbox labeled "Keep me signed in". A blue button labeled "Next" is positioned below the checkbox. At the bottom, there are three links: "Unlock account?", "Help", and "Logging in for the first time?".

Figure 2 Sign In Box

3. Enter the user's username.
4. Click **Next**. A Verify with your password box will be displayed.



The screenshot shows the ForwardHealth logo at the top. Below it is a circular icon containing a lock and four asterisks. The heading "Verify with your password" is centered. Below the heading is the text "PORTALUSER1" with a user icon. There is a "Password" label above a text input field containing eight asterisks and a toggle icon. A blue button labeled "Verify" is positioned below the input field. At the bottom, there are two links: "Forgot password?" and "Back to sign in".

Figure 3 Verify With Your Password Box

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

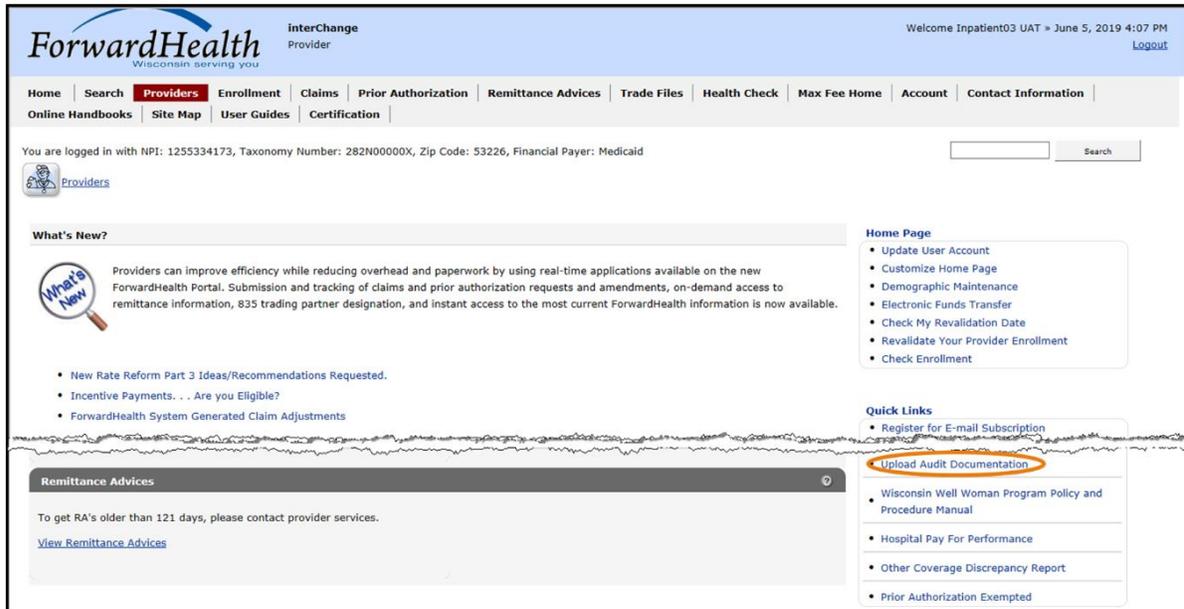


Figure 4 Secure Provider Page—Upload Audit Documentation Link

7. Click **Upload Audit Documentation** in the Quick Links section. The Upload Audit Documentation page will be displayed.

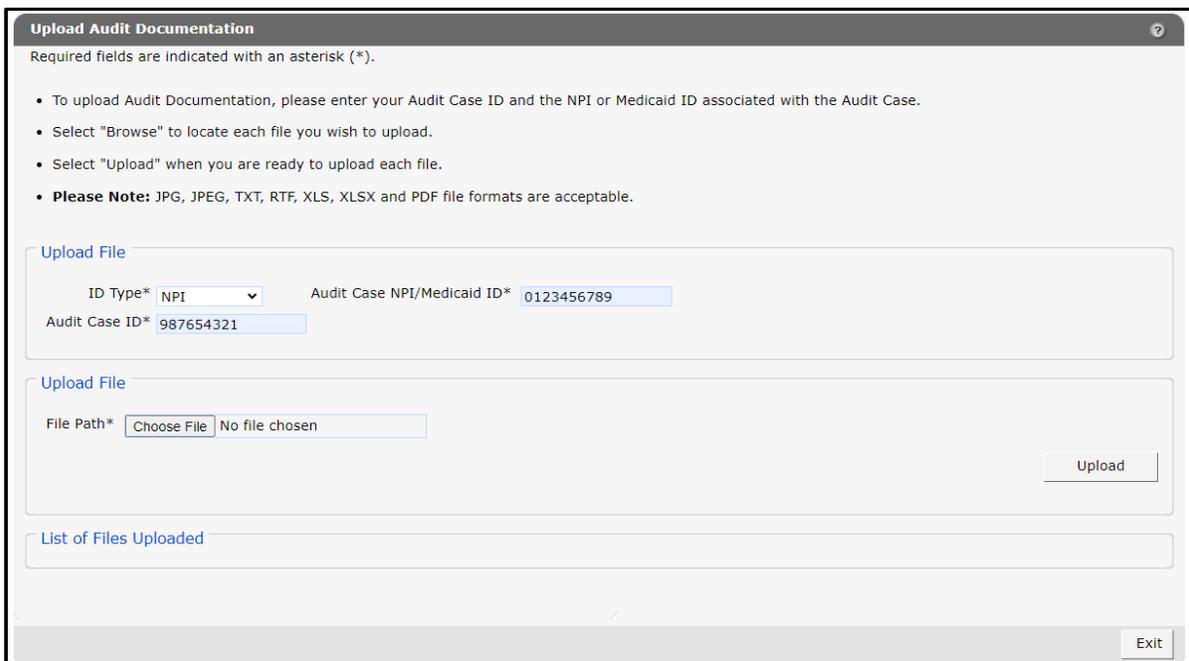


Figure 5 Upload Audit Documentation Page

8. Select National Provider Identifier (NPI) or Medicaid ID from the **ID Type** drop-down menu.
9. Enter the NPI or Medicaid ID into the **Audit Case NPI/Medicaid ID** field.
10. Enter the audit case identifier into the **Audit Case ID** field.
11. Click **Choose File**. The Open window will be displayed.

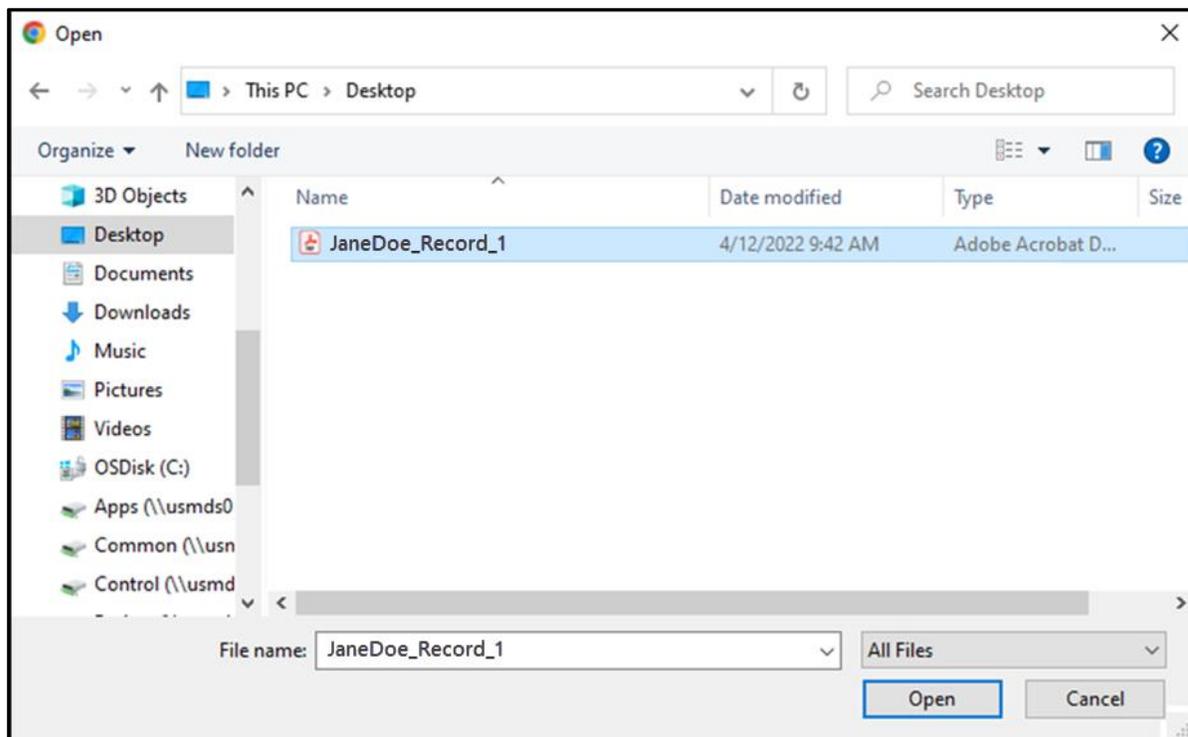


Figure 6 Open Window

12. Navigate to the appropriate computer or network location and select the file to upload.

Note: Files with any of the following extensions may be uploaded: .jpg, .jpeg, .pdf, .rtf, .txt, .xls, and .xlsx.

Microsoft Word files (.doc) cannot be uploaded but can be saved and uploaded in .pdf or .txt formats.

Photographs, X-rays, and dental models may be uploaded through the Portal if the images are in a .jpg or .jpeg format.

13. Click **Open**. The Choose file window will close and the file path will be displayed in the File Path field.

Upload Audit Documentation

Required fields are indicated with an asterisk (*).

- To upload Audit Documentation, please enter your Audit Case ID and the NPI or Medicaid ID associated with the Audit Case.
- Select "Browse" to locate each file you wish to upload.
- Select "Upload" when you are ready to upload each file.
- Please Note:** JPG, JPEG, TXT, RTF, XLS, XLSX and PDF file formats are acceptable.

Upload File

ID Type* NPI Audit Case NPI/Medicaid ID* 123456789
 Audit Case ID* 987654321

Upload File

File Path* Choose File JaneDoe_Record_1

Upload

List of Files Uploaded

Exit

Figure 7 Upload File Section

14. Click **Upload**. The uploaded file will be displayed in the “List of Files Uploaded” section at the bottom of the panel, and a confirmation message will be displayed above the panel.

The following messages were generated:
 File was uploaded successfully.

Upload Audit Documentation

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- Select "Browse" to locate each file you wish to upload.
- Select "Upload" when you are ready to upload each file.
- Please Note:** JPG, JPEG, TXT, RTF, XLS, XLSX and PDF file formats are acceptable.

Upload File

ID Type* NPI Audit Case NPI/Medicaid ID* 0123456789
 Audit Case ID* 987654321

Upload File

File Path* Choose File No file chosen

Upload

List of Files Uploaded

| File Name |
|------------------|
| JaneDoe_Record_1 |

Exit

Figure 8 File Uploaded Successfully

15. Upload as many files as necessary.
16. When all files have been uploaded, click **Exit**. The user will be returned to the secure homepage.