

User Guide

ForwardHealth Portal Prescribing/Referring/Ordering Provider

March 11, 2024

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1 Introduction

All physicians and other professionals who prescribe, refer, or order services are required to be enrolled in Wisconsin Medicaid. A Prescribing/Referring/Ordering Medicaid enrollment is available on the ForwardHealth Portal for physicians and other professionals who do not wish to routinely render or be reimbursed for services provided to ForwardHealth members.

To start the enrollment, prescribing, referring, and ordering providers should access the ForwardHealth Portal homepage at <https://www.forwardhealth.wi.gov/> and click **Become a Provider** in the Providers box. Providers can then access the Medicaid enrollment application by clicking **Start or Continue Your Enrollment**.

Both public and secure information is accessible through the Provider area of the ForwardHealth Portal. Public information is accessible to all users; however, to gain access to secure information, providers are required to establish a secure Portal account. After enrolling in Wisconsin Medicaid, providers can gain access to the secure areas of the Portal by setting up a secure account using the procedures detailed in this document.

2 Request Portal Access

To establish a provider Portal account, providers will need a personal identification number (PIN). Providers can establish as many provider Portal accounts as needed for their business.

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

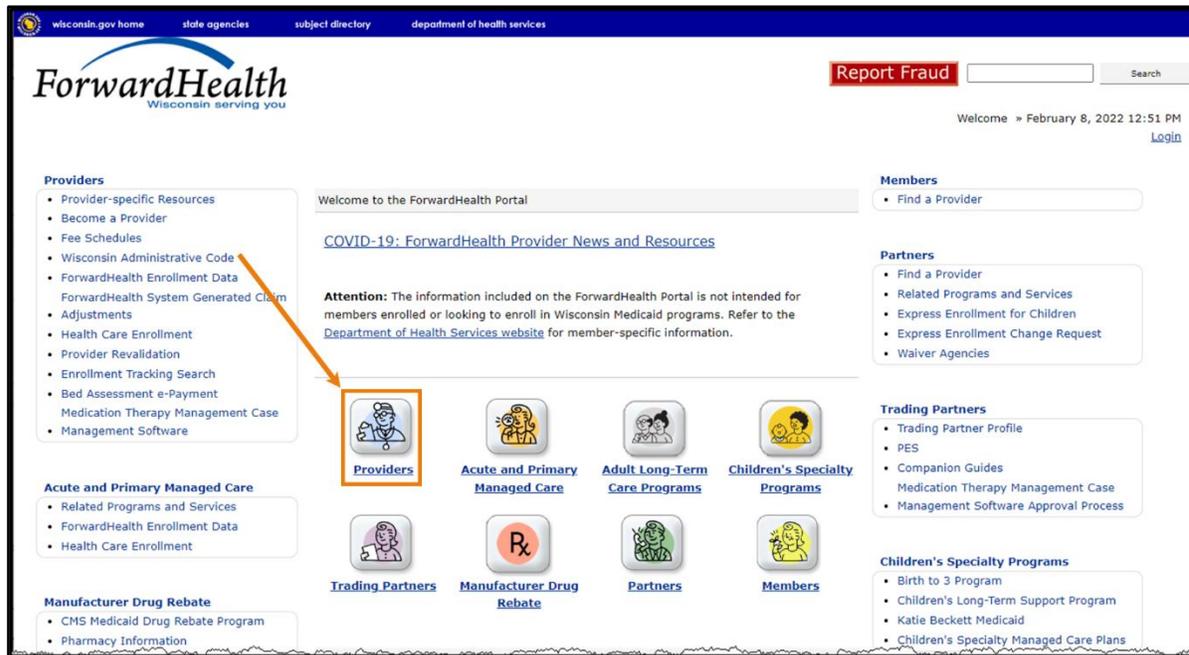


Figure 1 ForwardHealth Portal Homepage

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

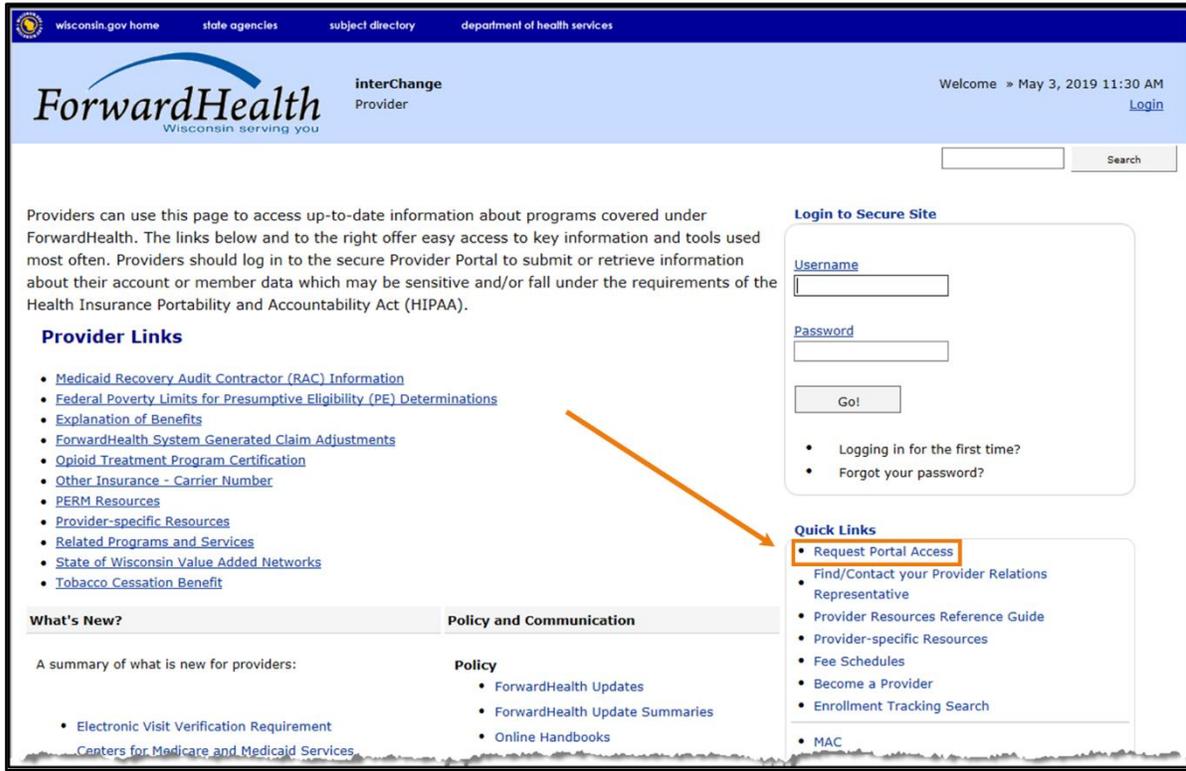


Figure 2 Public Provider Homepage

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

Request Portal Access

Required fields are indicated with an asterisk(*).

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

NPI Information

NPI Number

ForwardHealth Enrollment for Requested NPI
Enter your NPI and press search.

Selected NPI *

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

OR

Provider Number Information *

Provider ID
 Financial Payer
 SSN or TIN

Figure 3 Request Portal Access Page

- In the “NPI Information” section, enter the provider’s National Provider Identifier (NPI) in the NPI Number field.
- Click **Search**.

If the NPI is found, the “ForwardHealth Enrollment for Requested NPI” section will auto-populate with the provider’s information that ForwardHealth has on file.

NPI Information

NPI Number

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

Figure 4 ForwardHealth Enrollment for Requested NPI Section

Proceed to [step 6](#) to continue with the Portal access request.

If the NPI is *not* found, the page will refresh; however, the “Selected NPI” section will not be populated with the provider’s information. Complete the following steps to continue with the Portal access request.

- Enter the provider’s Medicaid Provider ID in the “Provider Number Information” section at the bottom of the page.

Provider Number Information *

Provider ID

Financial Payer

SSN or TIN

Figure 5 Provider Number Information Section

- From the Financial Payer drop-down menu, select the financial payer enrollment for which the provider is requesting a provider Portal account.
- Enter the provider’s Social Security number (SSN) or Tax Identification Number (TIN) in the SSN or TIN field.
- Proceed to [step 8](#).

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

NPI Information

NPI Number

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

Selected NPI *

NPI Number

Name

Address Line 1

City

ZIP -

Taxonomy

Financial Payer

SSN or TIN

Figure 6 Selected NPI Section with Auto-populated Information

- Enter the provider’s SSN or TIN in the SSN or TIN field in the “Selected NPI” section.

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

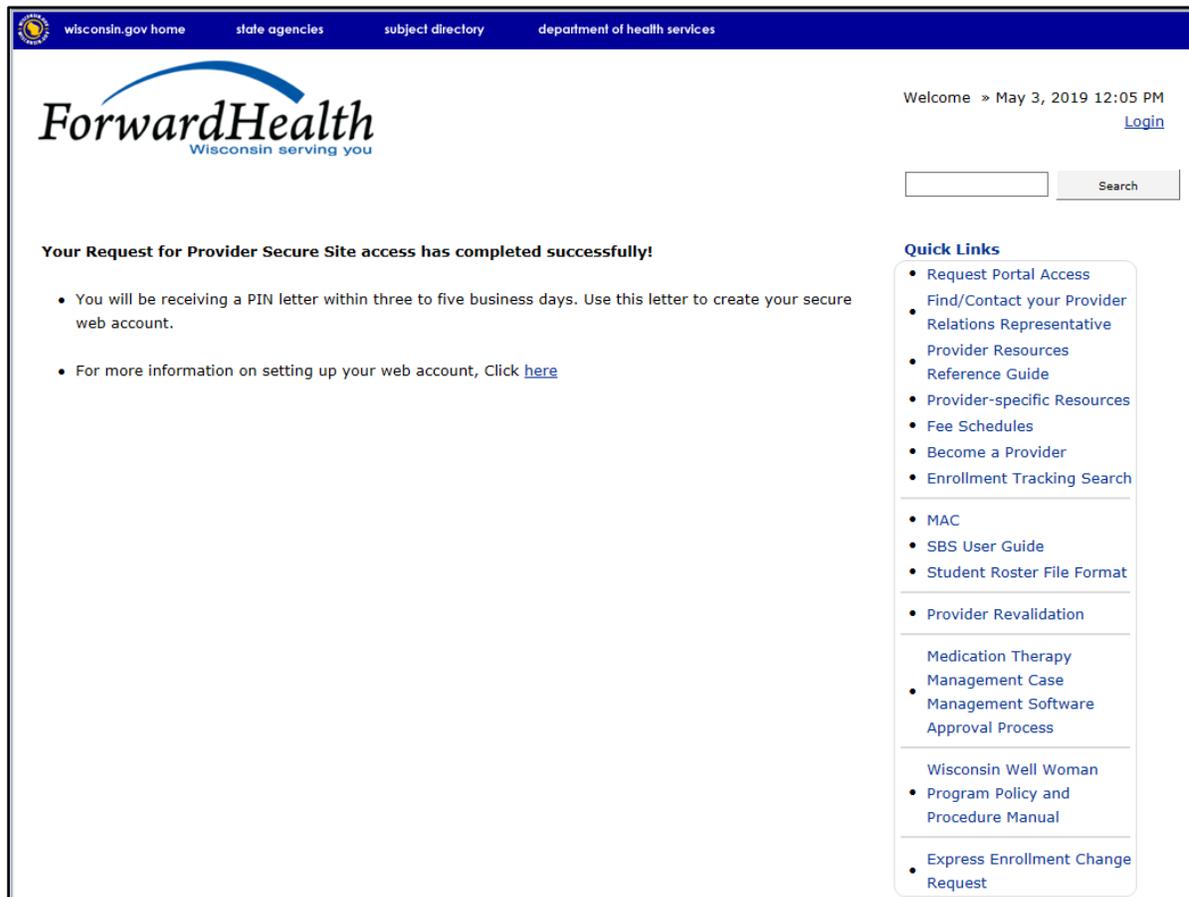


Figure 7 Confirmation Page

If any of the information is incomplete, an error message will appear at the top of the page and the required field will be highlighted in yellow.

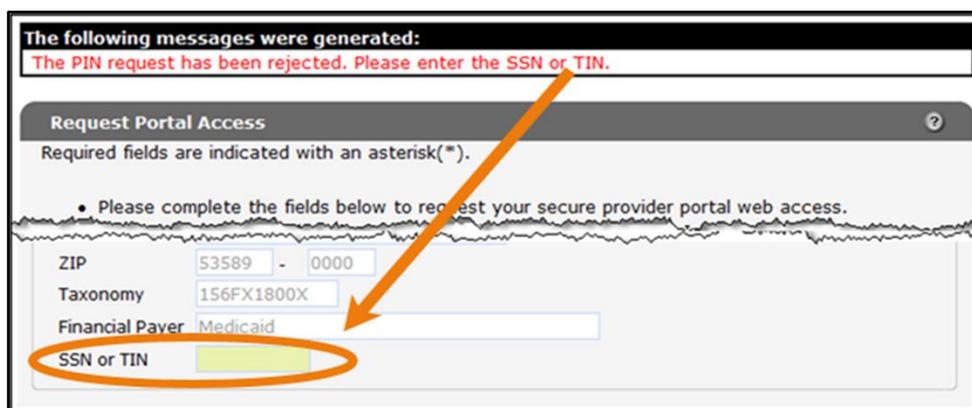


Figure 8 Example Incomplete Information Message

Enter the required information and click **Submit** again.

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



Figure 9 Example Error Message

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

- The SSN is incorrect. Verify the number and enter the correct number.
- A PIN was already requested. Check within the organization to find out if someone has already received the PIN and set up an account(s).

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

After a provider has successfully requested Portal access, a letter containing a PIN will be mailed to the provider. Access to the Portal is *not* possible without a PIN. The letter also includes a Login ID, which is a health care provider's NPI. For security purposes, the Login ID contains only digits 3, 4, 5, and 6 of the NPI or Provider ID.

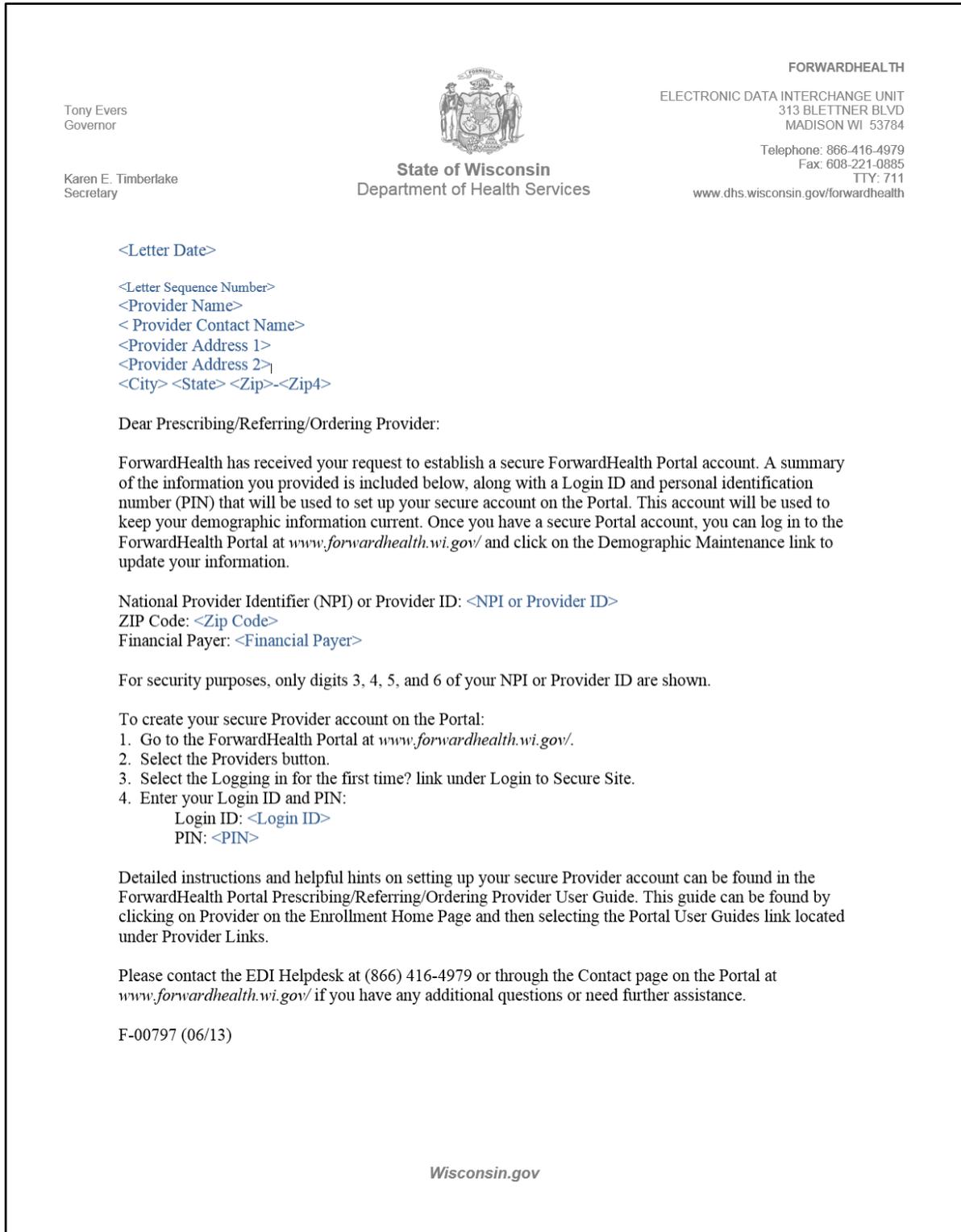


Figure 10 PIN Letter

3 Set Up an Account

After receiving a PIN letter, 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 user name and password as well as to enter contact and security information.

3.1 Account Types

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

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

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

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

3.2 Logging in for First Time

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

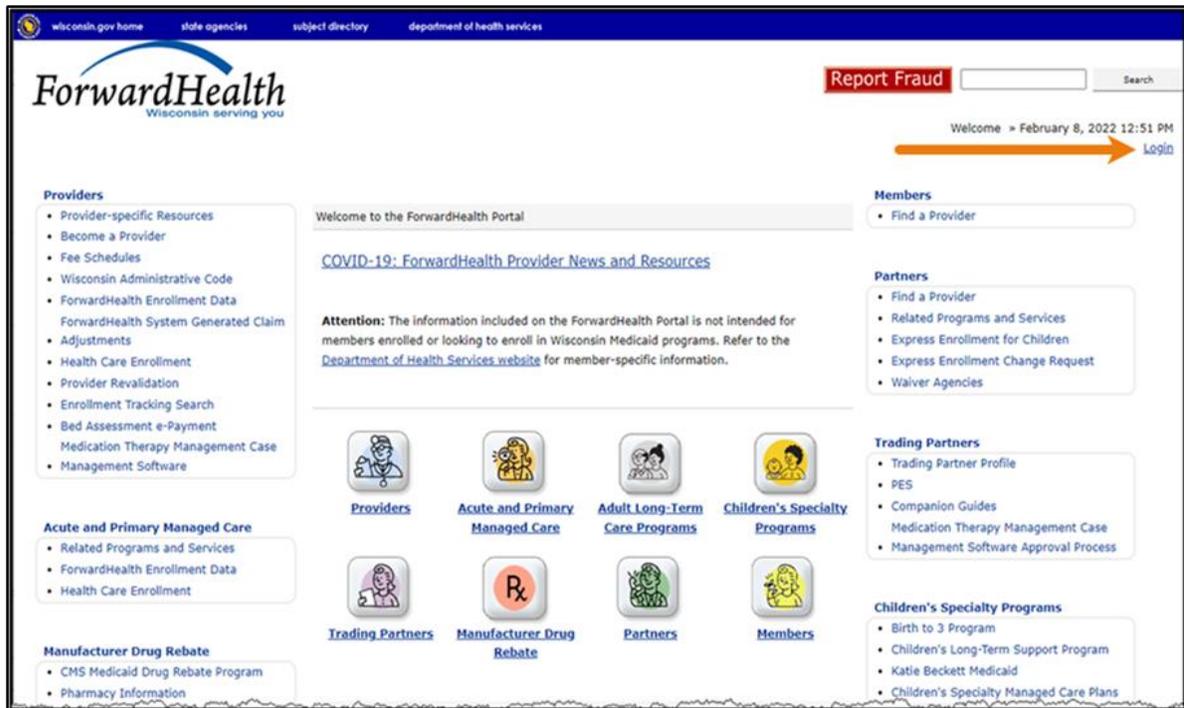
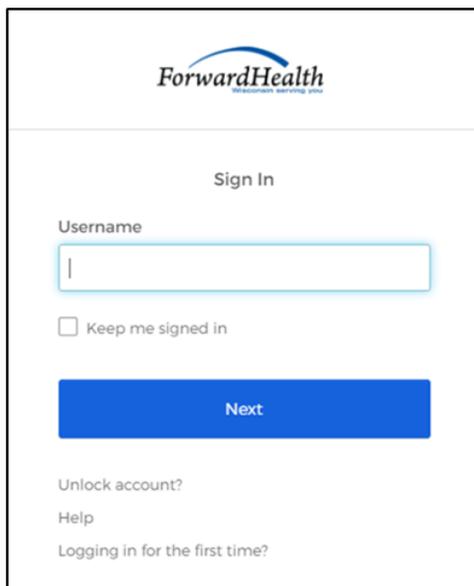


Figure 11 ForwardHealth Portal Page

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

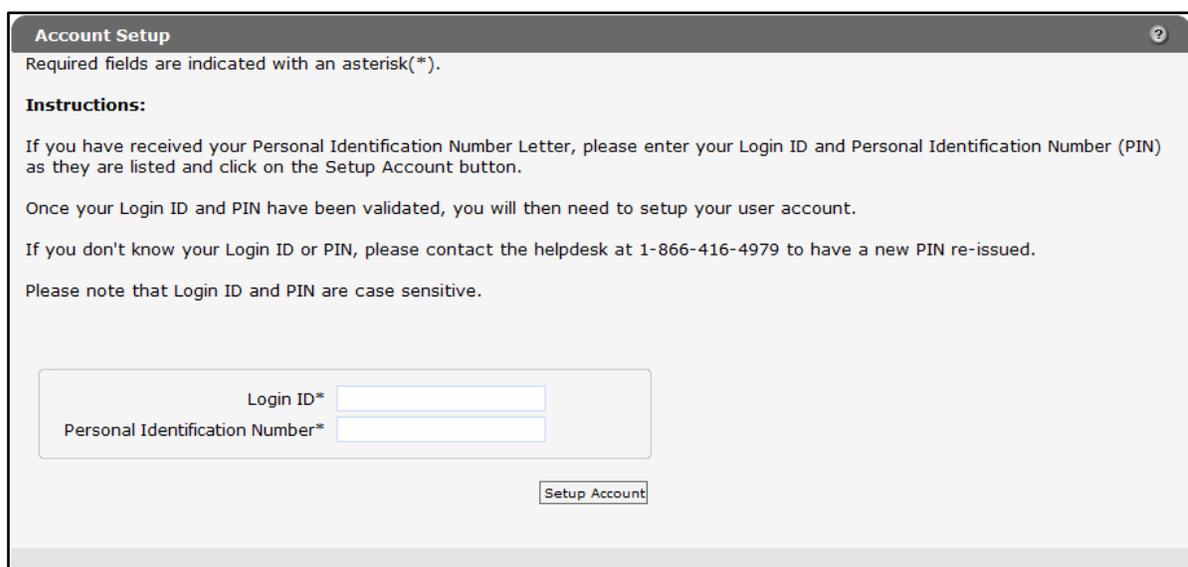


The screenshot shows the ForwardHealth logo at the top. Below it is the heading "Sign In". There is a text input field for "Username" with a vertical cursor. Below the input field is a checkbox labeled "Keep me signed in". A blue button labeled "Next" is positioned below the checkbox. At the bottom of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

Figure 12 Sign In Box

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

The Account Setup page will be displayed.



The screenshot shows the "Account Setup" page. At the top, it says "Required fields are indicated with an asterisk(*)". Below this is the "Instructions:" section, which contains three paragraphs of text. The first paragraph says: "If you have received your Personal Identification Number Letter, please enter your Login ID and Personal Identification Number (PIN) as they are listed and click on the Setup Account button." The second paragraph says: "Once your Login ID and PIN have been validated, you will then need to setup your user account." The third paragraph says: "If you don't know your Login ID or PIN, please contact the helpdesk at 1-866-416-4979 to have a new PIN re-issued." Below the instructions, there is a note: "Please note that Login ID and PIN are case sensitive." At the bottom, there are two input fields: "Login ID*" and "Personal Identification Number*", both with asterisks. A "Setup Account" button is located below the input fields.

Figure 13 Account Setup Page

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

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

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

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

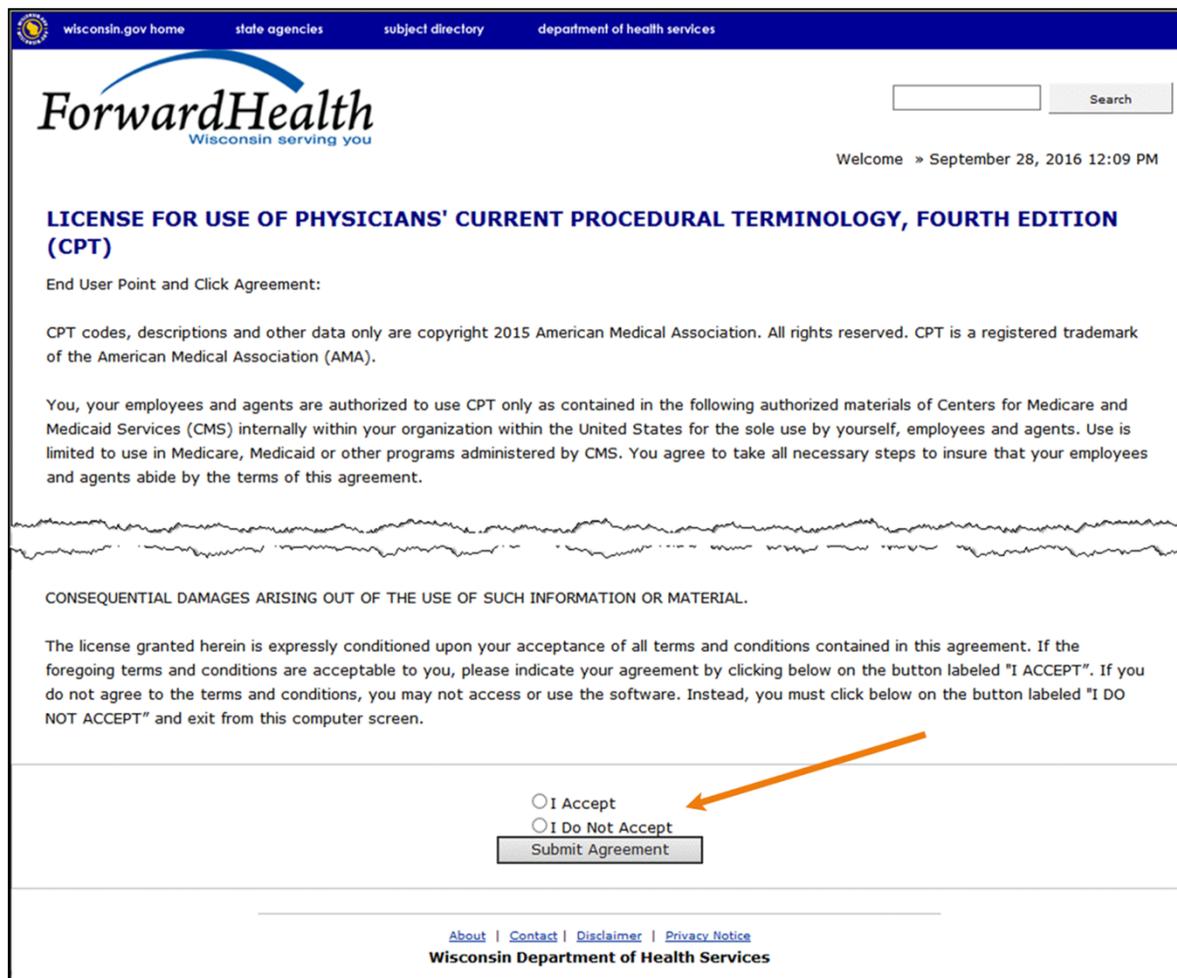
Figure 14 Administrator User Profile Page

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 phone number must include the area code. The number will be auto-formatted.
8. Read the Security and Confidentiality agreement.
9. Check the agreement checkbox.
10. Click **Submit**. If the user receives an error message, correct the error(s) and click **Submit** again.

The License for Use of Physicians' Current Procedural Terminology, Fourth Edition (CPT) and Point and Click License for Use of Current Dental Terminology (CDT) agreements page will be displayed.



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ForwardHealth
Wisconsin serving you

Search

Welcome » September 28, 2016 12:09 PM

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End User Point and Click Agreement:

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I Accept
 I Do Not Accept

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Wisconsin Department of Health Services

Figure 15 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 Portal.

12. The user’s secure Provider homepage will be displayed.

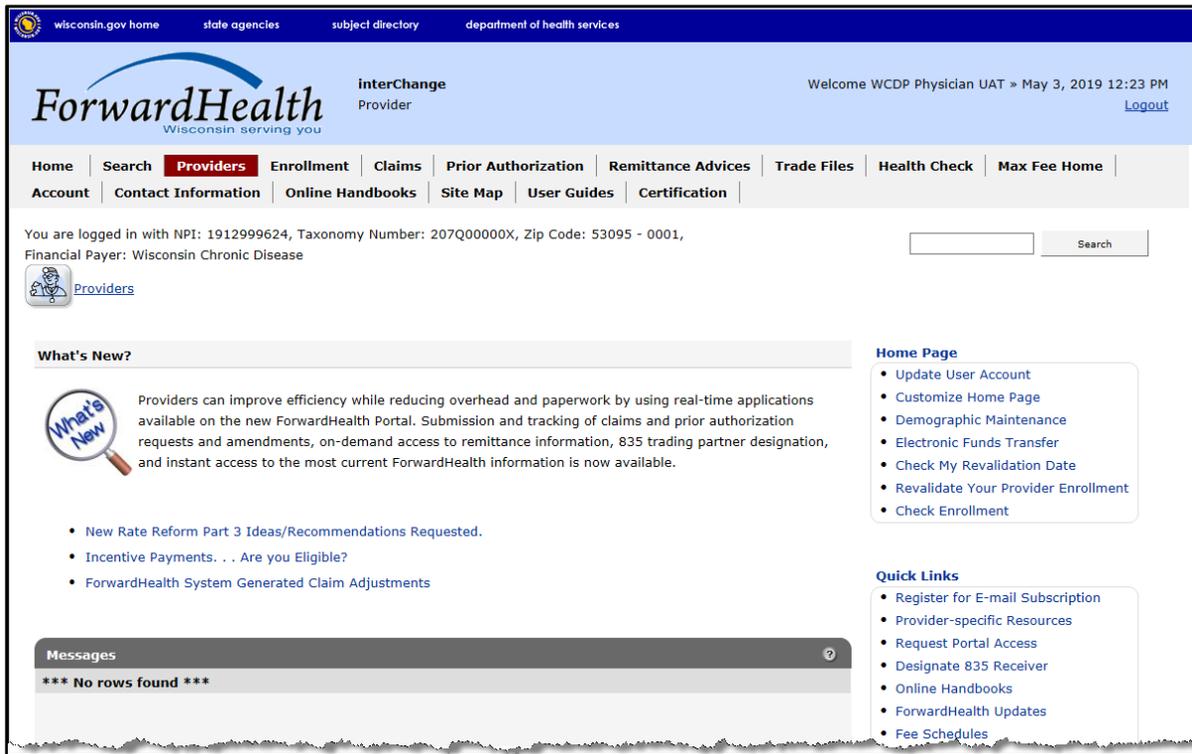


Figure 16 Secure Provider Homepage

3.3 Reset Password

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

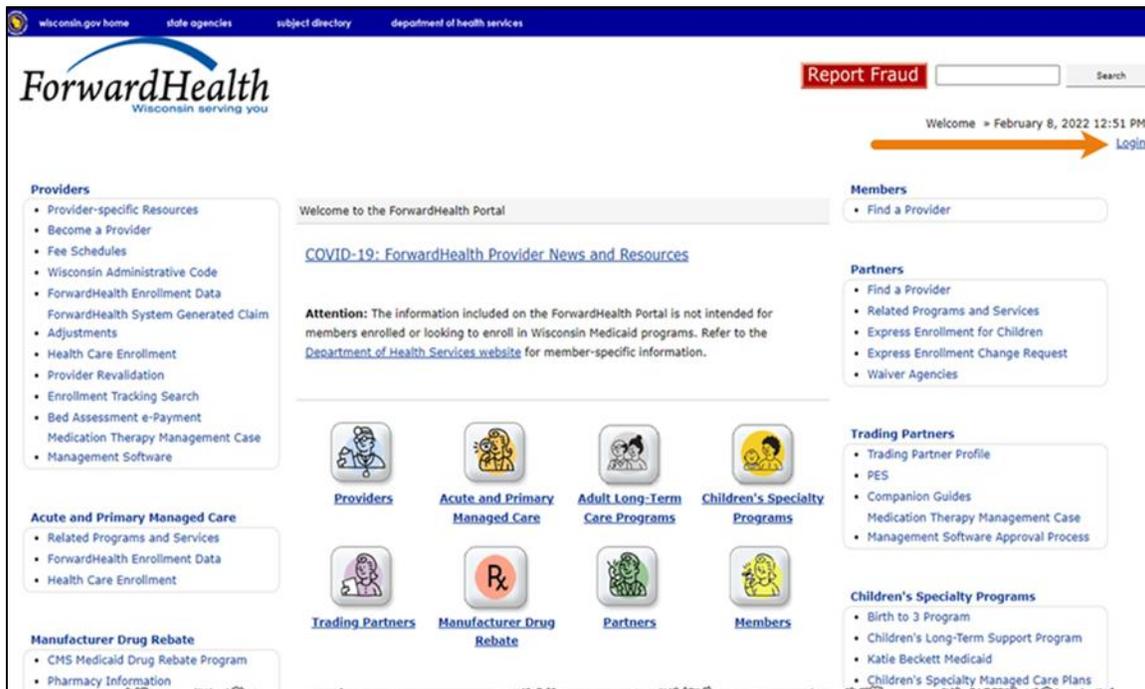


Figure 17 ForwardHealth Portal Page

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

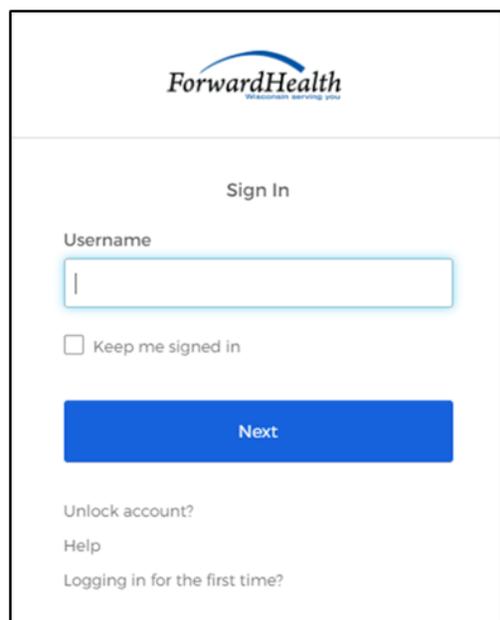


Figure 18 Sign In Box

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

A Verify with your password box will be displayed.

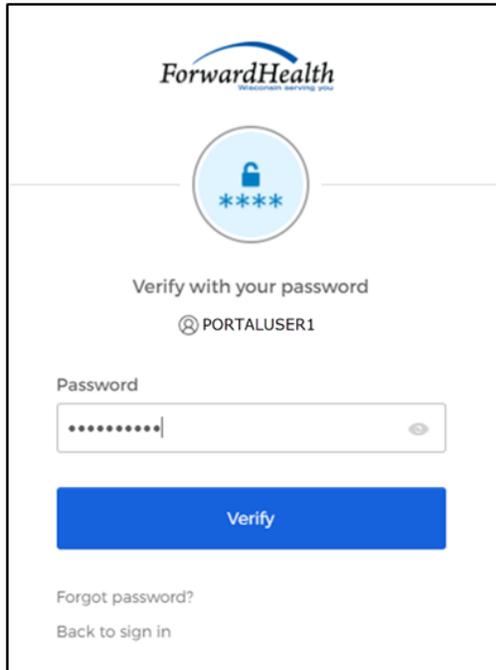


Figure 19 Verify With Your Password Box

5. Click **Forgot password?**

A Reset your password box will be displayed.

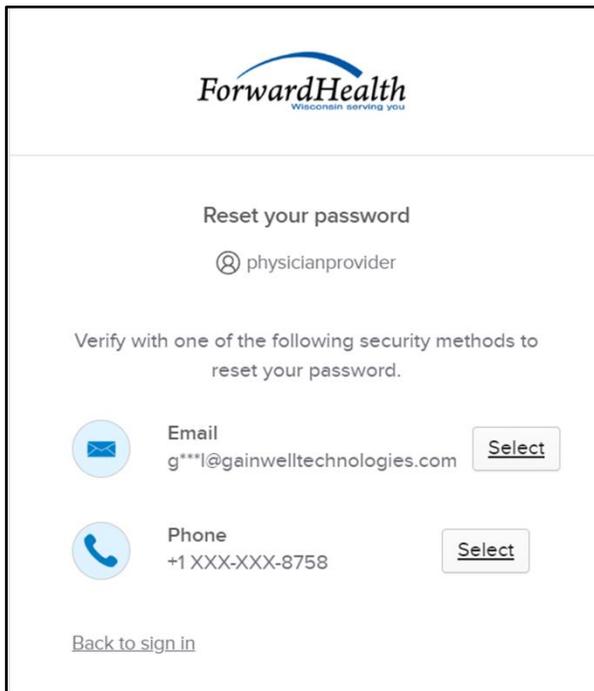


Figure 20 Reset Your Password Box

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.

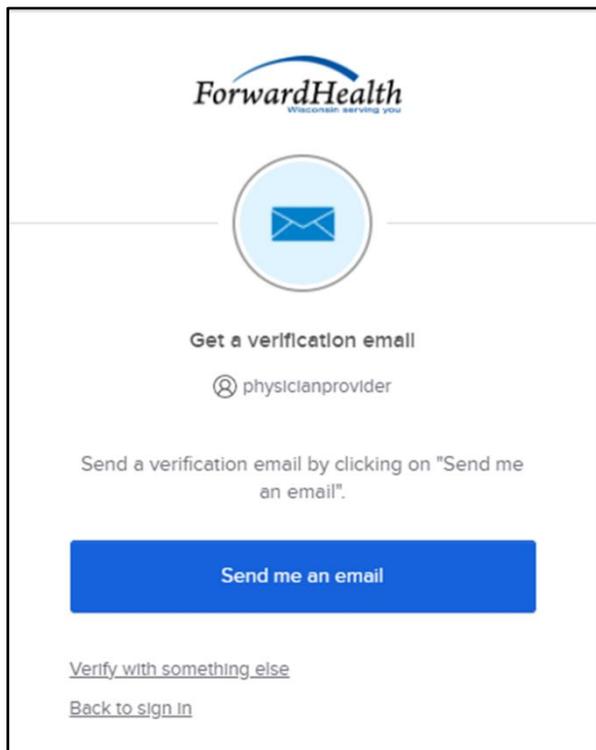


Figure 21 Get A Verification Email

- 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.

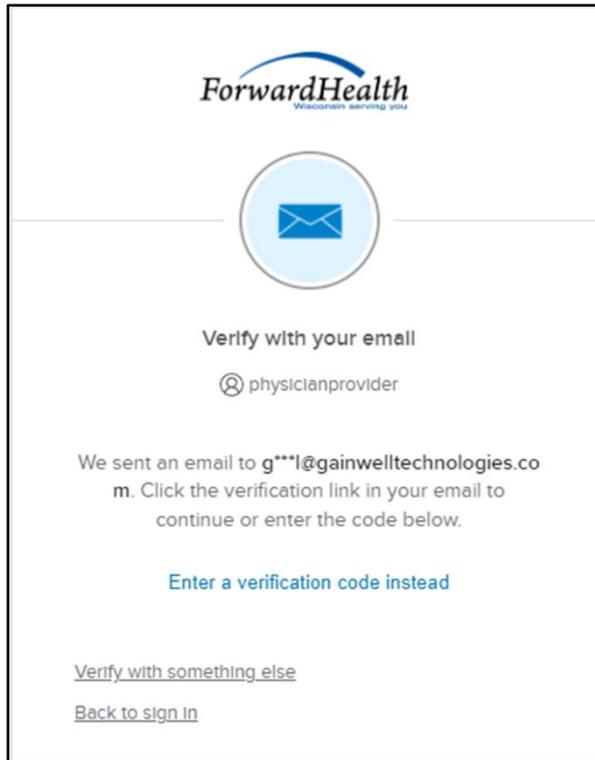


Figure 22 Verify With Your Email Box

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

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

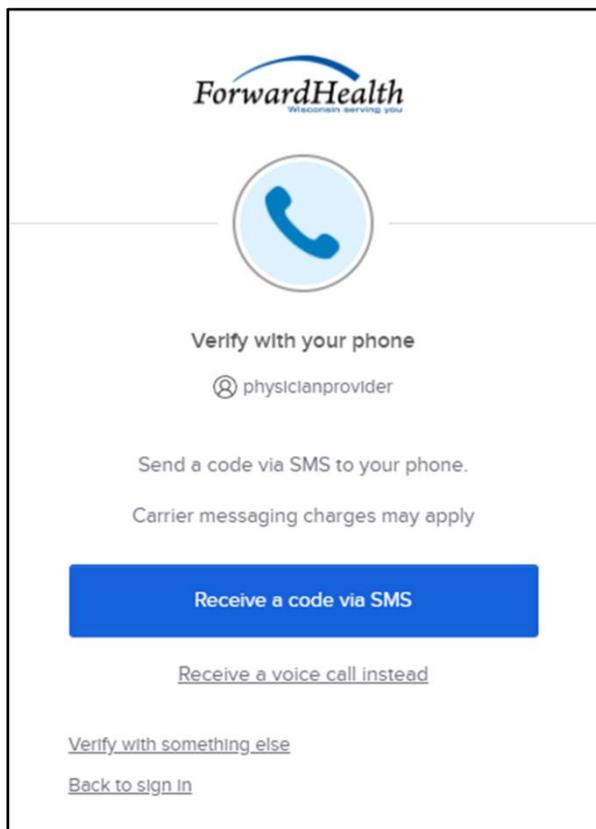


Figure 23 Verify With Your Phone Box

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

A Verify with your phone box will be displayed.

ForwardHealth
Wisconsin serving you



Verify with your phone

 physicianprovider

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

Carrier messaging charges may apply

Enter Code

Verify

[Verify with something else](#)

[Back to sign in](#)

Figure 24 Verify With Your Phone Box

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

A Get a verification email box will be displayed.

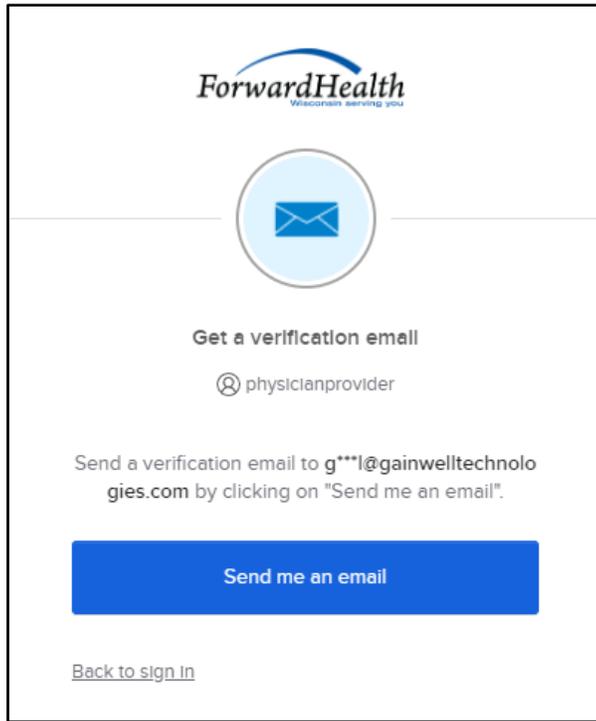


Figure 25 Get A Verification Email Box

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

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

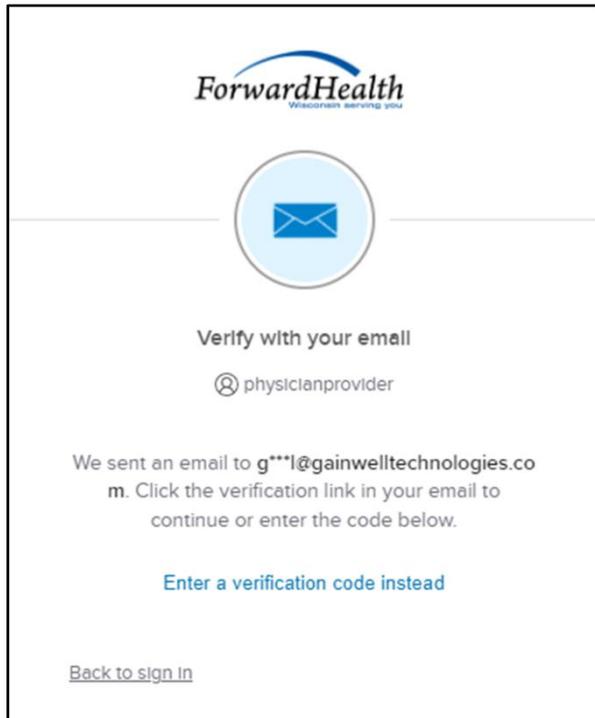


Figure 26 Verify With Your Email Box

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

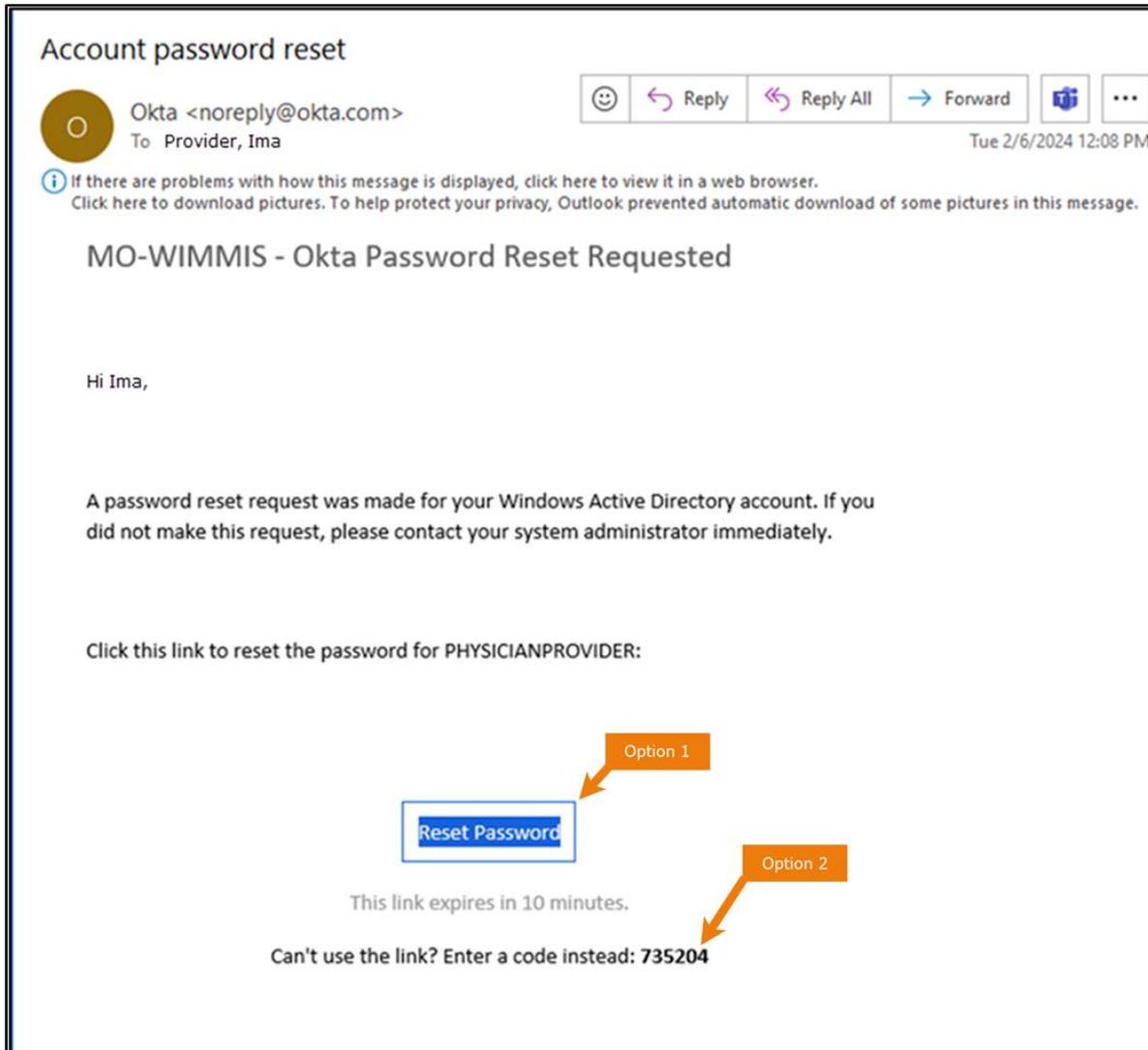


Figure 27 Account Password Reset Email

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.

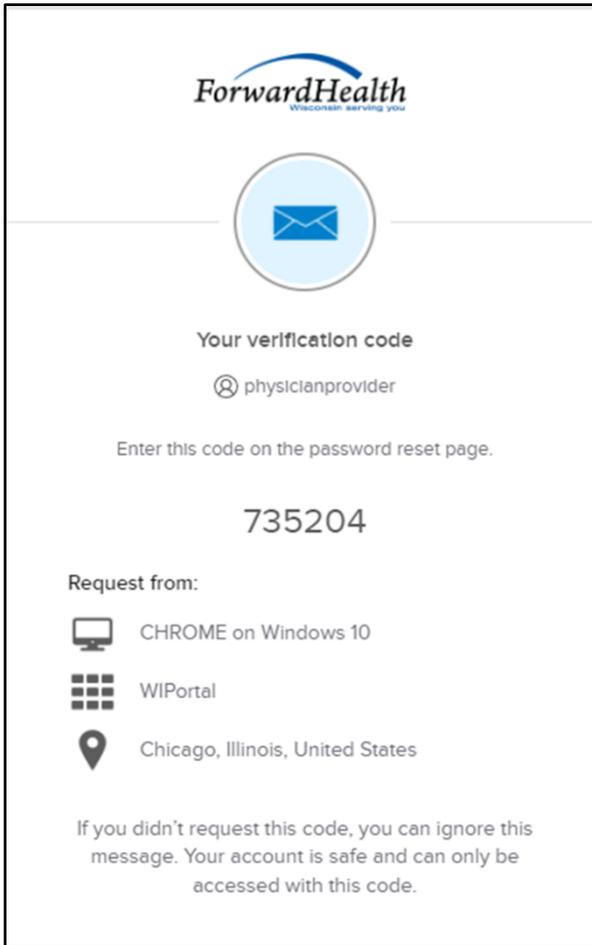


Figure 28 Verification Code Box

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**.

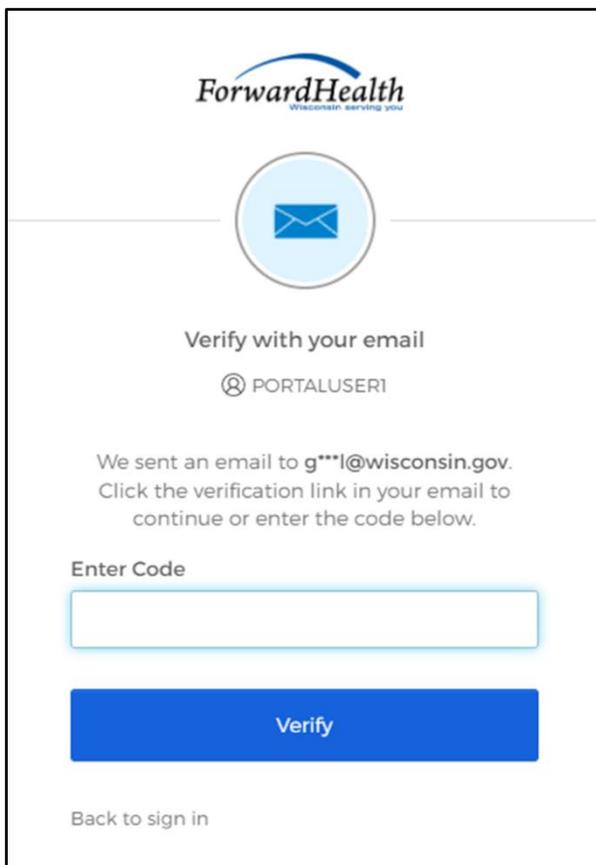


Figure 29 Verify With Your Email Box

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

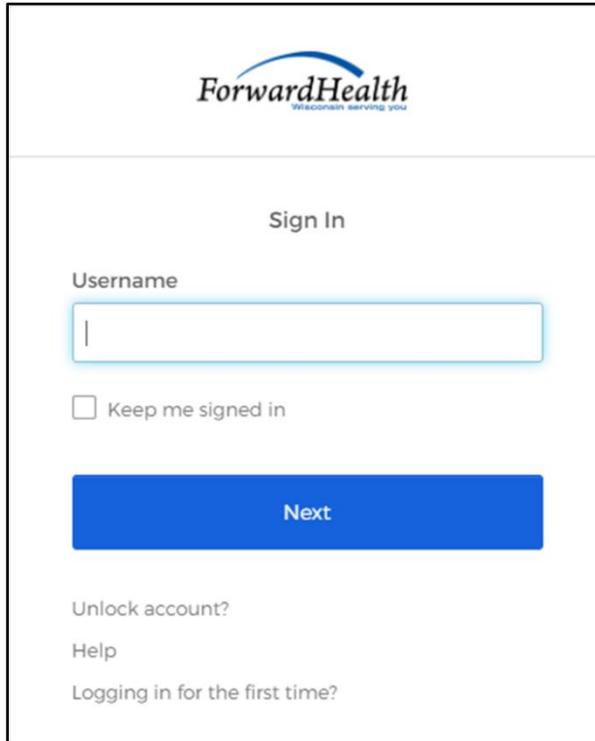
[Back to sign in](#)

Figure 30 Reset Your Okta Password Box

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

3.4 Unlocking An Account

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

The image shows a screenshot of the ForwardHealth Sign In interface. At the top is the ForwardHealth logo with the tagline "Wisconsin working you". Below the logo is the text "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 of the form, there are three links: "Unlock account?", "Help", and "Logging in for the first time?".

ForwardHealth
Wisconsin working you

Sign In

Username

Keep me signed in

Next

Unlock account?

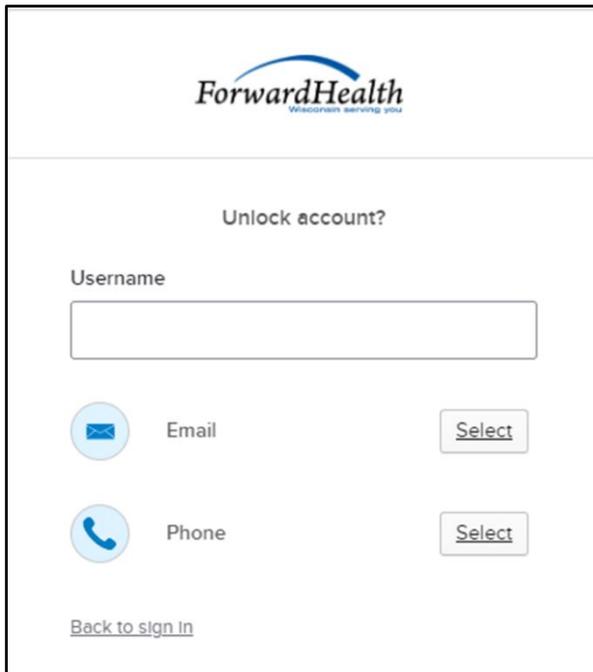
Help

Logging in for the first time?

Figure 31 Sign In Box

3. Click **Unlock account?**

An Unlock account box will be displayed.



The screenshot shows a web form titled "Unlock account?" with the ForwardHealth logo at the top. The logo includes the text "ForwardHealth" and "Wisconsin serving you". Below the title is a "Username" label and an empty text input field. Underneath 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 of the form is a link labeled "Back to sign in".

Figure 32 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.

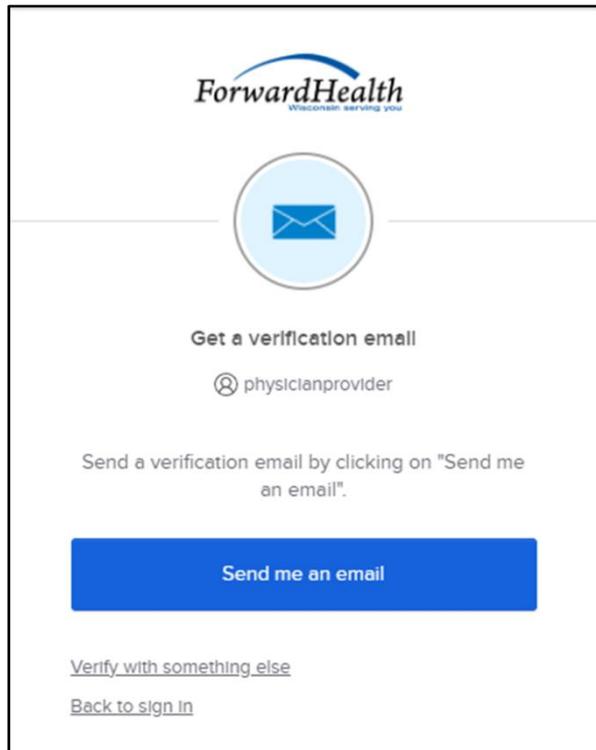


Figure 33 Get A Verification Email

- 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.

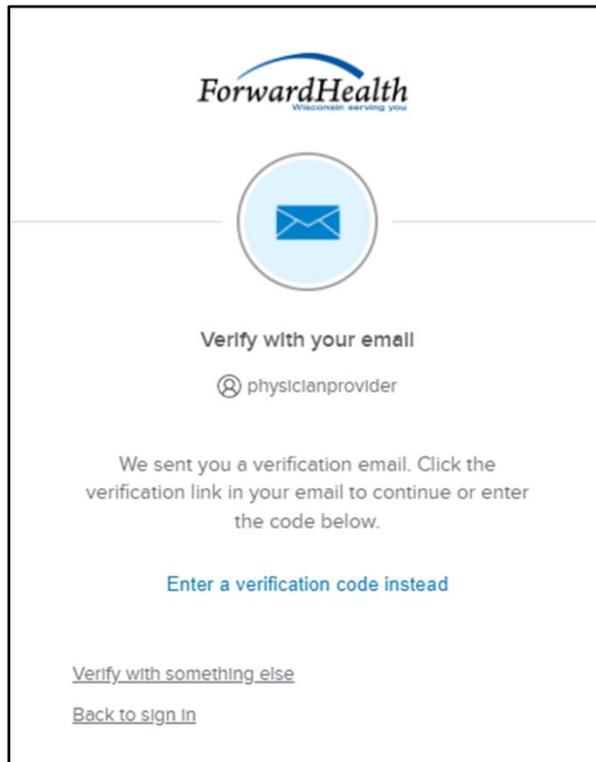


Figure 34 Verify With Your Email Box

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

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

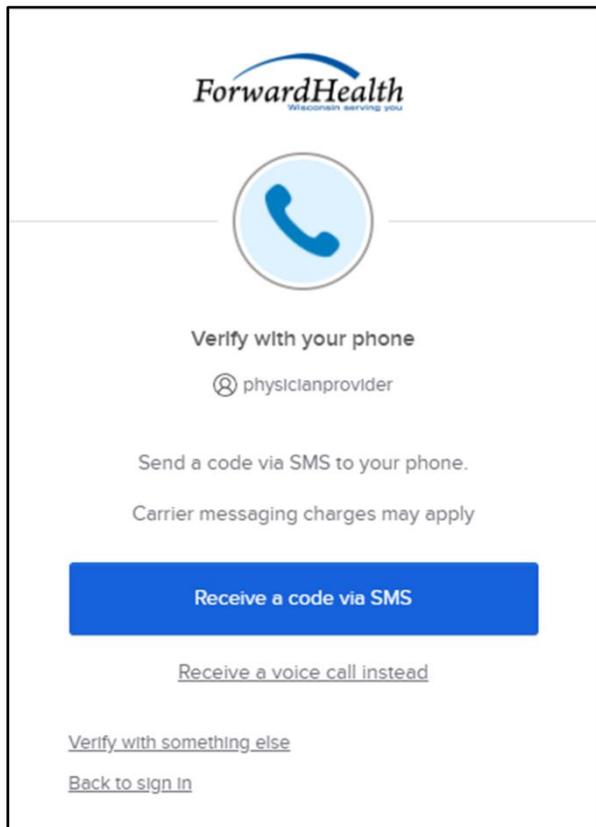


Figure 35 Verify With Your Phone Box

- 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.

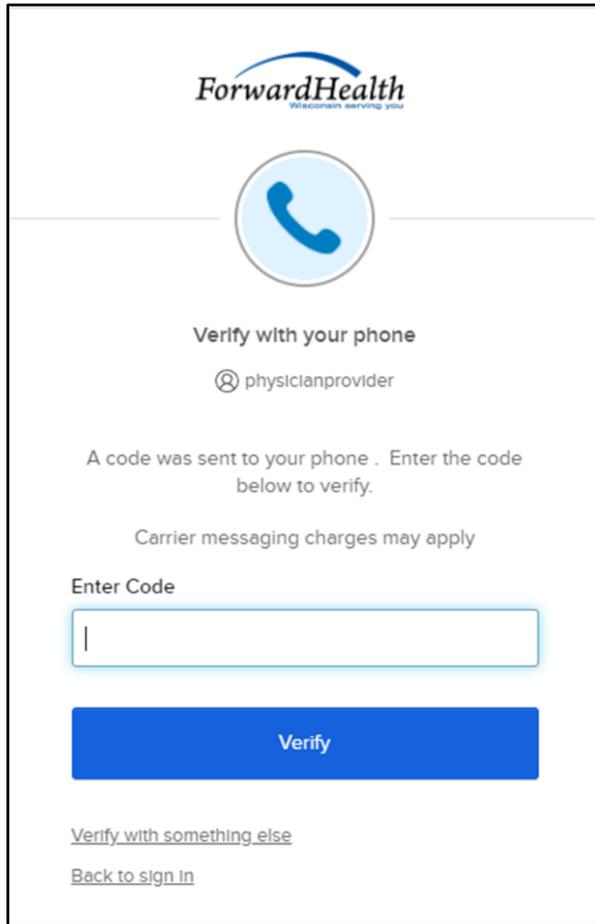


Figure 36 Verify With Your Phone Box

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

A Get a verification email box will be displayed.

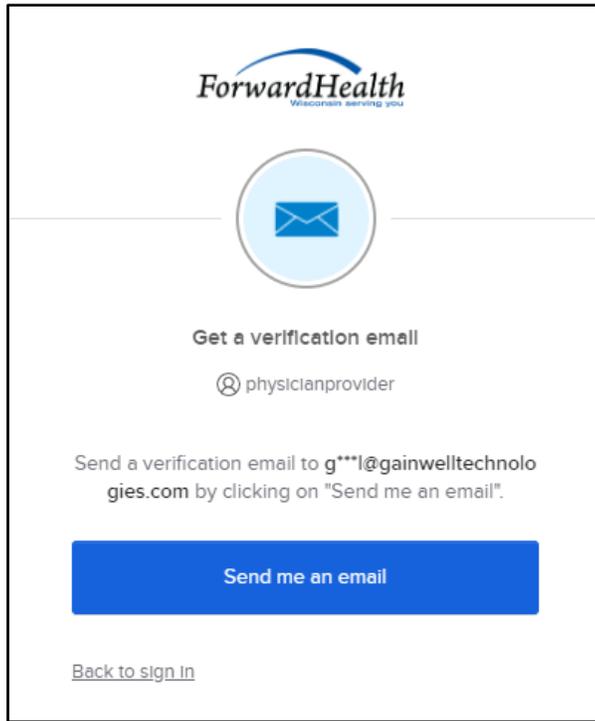


Figure 37 Get a Verification Email Box

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

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

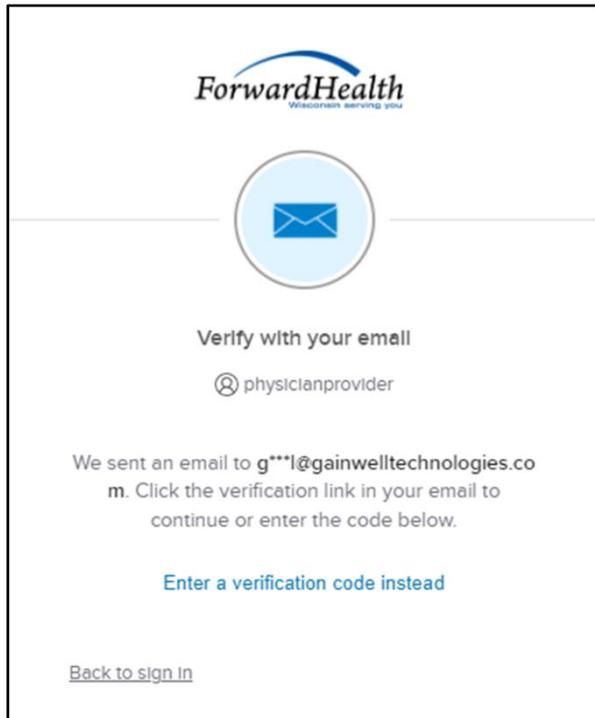


Figure 38 Verify With Your Email Box

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

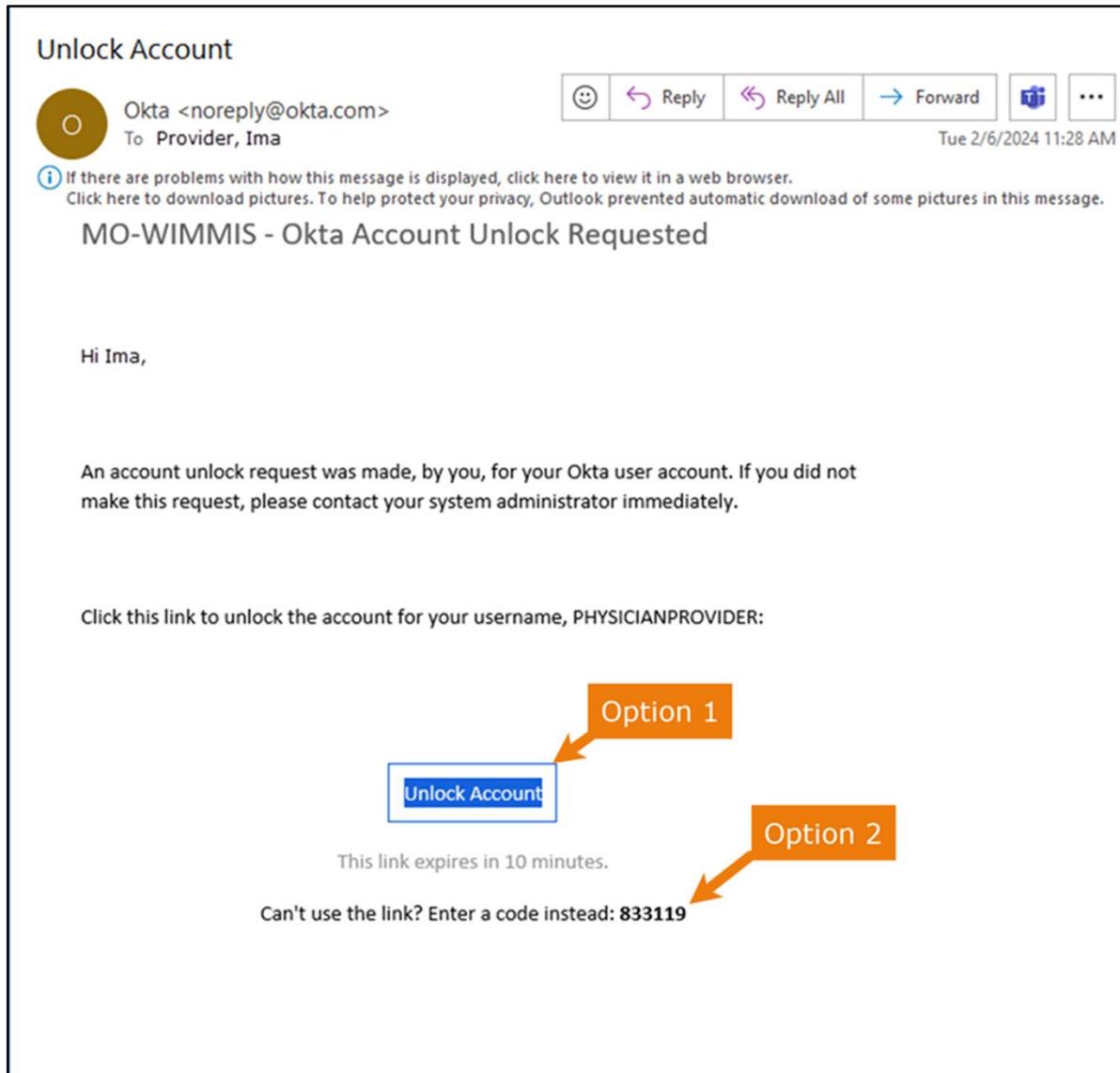


Figure 39 One-Time Verification Code Email

- 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.

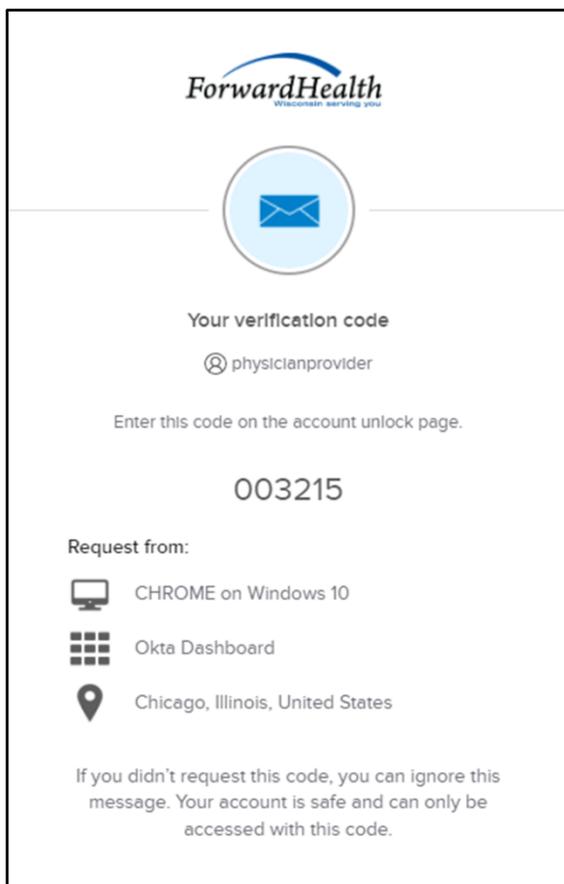


Figure 40 Verification Code Box

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.

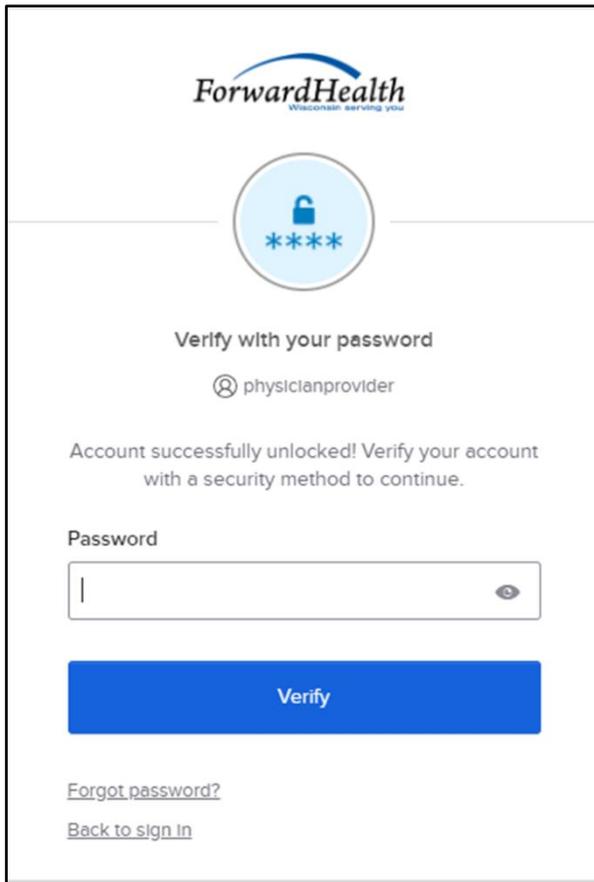


Figure 41 Verification Code Box

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

4 Demographic Maintenance Tool

The demographic maintenance tool on the ForwardHealth Portal allows prescribing, referring, and ordering providers to securely, efficiently, and conveniently supply and update their address information.

When a 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. Information that cannot be immediately updated is manually verified, which may take additional processing time.

4.1 Access the Demographic Maintenance Tool

Click **Demographic Maintenance** located in the Home Page box on the right of the user's secure Provider homepage.

Note: The Demographic Maintenance option is only displayed for administrative accounts or for clerk accounts that have been assigned the Demographic Maintenance role. For information about assigning clerk roles, refer to [Chapter 7 Clerk Maintenance](#) in this user guide.

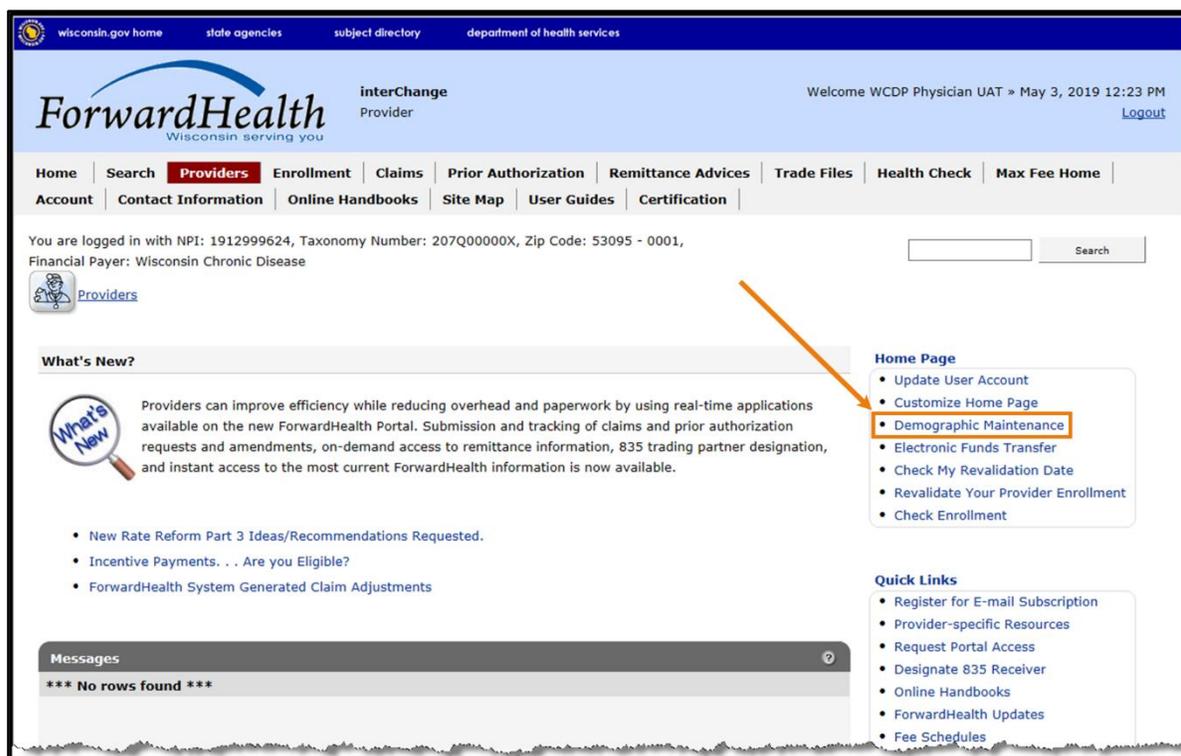


Figure 42 Secure Provider Homepage

The Introduction panel will be displayed.

4.2 Introduction Panel

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

ForwardHealth Wisconsin serving you

interChange Provider

Welcome » June 4, 2013 12:22 PM [Logout](#)

Home Search **Providers** Max Fee Home Account Contact Information Online Handbooks Site Map User Guides

You are logged in with NPI: 1111111111, Taxonomy Number: 208D00000X, Zip Code: 54848, Financial Payer: Medicaid

[Providers](#) » [Demographic Maintenance](#)

Base Information

Name: GENERAL CLINIC	Address: 123 MAIN ST
Provider ID: 1111111111 NPI	LADYSMITH, WI 54848
Taxonomy Code: 208D00000X	(715)000-0000
Provider Type / Specialty: Physician Group/General Practice	

[Introduction](#) » [Practice Location Address](#) » [Mailing Address](#) ← **Click to navigate to a specific panel.**

Introduction

Required fields are indicated with an asterisk (*).

- Select one of the above links to make updates to your information. When all changes are complete, select the "Submit" button to complete the change process.
- If you need to change any information not available via this page, you will need to complete the [Provider Change of Address or Status Form](#) and submit it through the mail.

↘ **Click to navigate to the next panel in the Demographic Maintenance Tool.**

Next Exit

Figure 43 Introduction Panel

The “Base Information” section displays basic information about the account to which the user is logged in, such as the provider’s name, NPI, taxonomy code, provider type and specialty, address, and telephone number.

To navigate the demographic maintenance tool, either click the buttons at the bottom of the demographic maintenance tool panels or click a link above the displayed panel to navigate to a specific panel.

To begin updating information, click either **Next** or a specific panel’s navigation link.

4.3 Practice Location Address Panel

On the Practice Location Address panel, users may update the contact information for the provider’s office and the address where the provider's office is physically located and where records are normally kept. Any changes to the practice location 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](#).

Practice Location Address

Required fields are indicated with an asterisk (*).

- Practice location is the street address where a provider office is physically located and where the records are normally kept.
- A provider directory search will be made available to the public. The address and telephone for member use will be included in a provider directory for BadgerCare Plus, Medicaid and WCDP providers (does not apply to WWWP).
- Contact Person and Telephone Number for Contact Person will be used for administrative purposes only.
- If your practice location address has changed to another state you must report this change in writing to ForwardHealth.

Street Address Line 1*

Street Address Line 2

City*

State/ZIP -

County

Contact Person*

Telephone Number - Contact Person* Ext.

Telephone Number - Member Use*

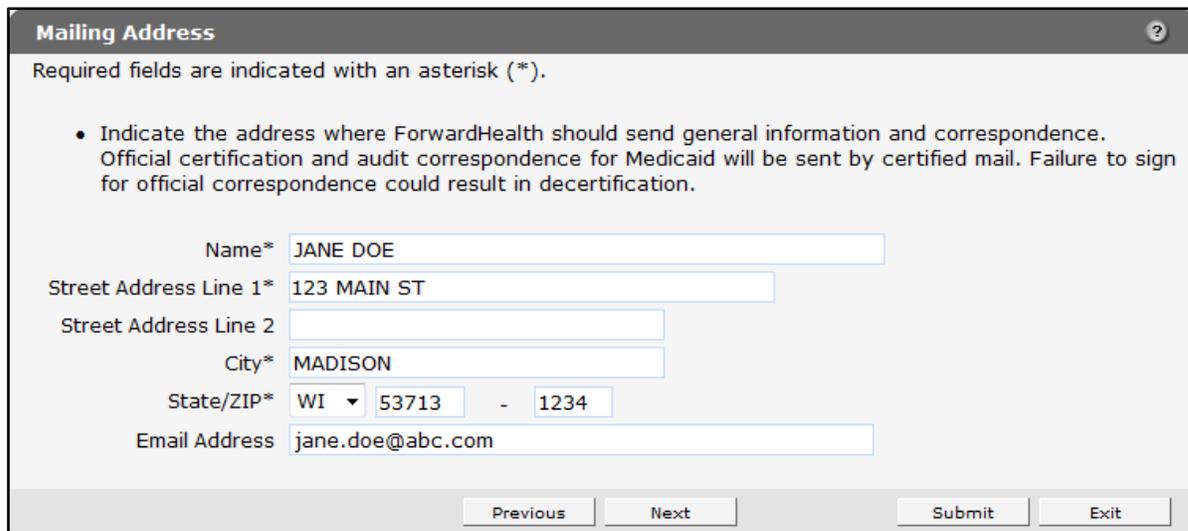
Figure 44 Practice Location Address Panel

1. Delete the information that needs to be changed and enter new information.
2. If no further changes in the demographic maintenance tool are necessary, click **Submit**. For more information, refer to [Section 4.5 Submit the Application](#) in this user guide.

Note: To navigate the demographic maintenance tool, either click **Next** to go to the next panel in the tool, click **Previous** to return to the previous panel in the tool, or click a link above the displayed panel to go to a specific panel.

4.4 Mailing Address Panel

On the Mailing Address panel, users may update the address to which ForwardHealth should send general information and correspondence. Concise address information aids in proper mail delivery.



Mailing Address ?

Required fields are indicated with an asterisk (*).

- Indicate the address where ForwardHealth should send general information and correspondence. Official certification and audit correspondence for Medicaid will be sent by certified mail. Failure to sign for official correspondence could result in decertification.

Name* JANE DOE

Street Address Line 1* 123 MAIN ST

Street Address Line 2

City* MADISON

State/ZIP* WI 53713 - 1234

Email Address jane.doe@abc.com

Previous Next Submit Exit

Figure 45 Mailing Address Panel

1. Delete the information that needs to be changed and enter new information.
2. If no further changes in the demographic maintenance tool are necessary, click **Submit**. For more information, refer to Section 4.5 Submit the Application in this user guide.

4.5 Submit the Application

After the user completes all of their changes, they may submit the application from *any* panel in the demographic maintenance tool. None of the changes will go into effect until they are submitted.

Click **Submit** from any completed panel.

If there was a problem with the submission, an error message indicating the reason the record was not updated will be displayed. Correct the error and click **Submit** again.

If ForwardHealth needs to review the entered information, the Application Submitted panel will be displayed. ForwardHealth will manually verify the entered information and, once the information is verified, update the provider's file. Click **Save** to view and print a Provider Change of Address or Status form indicating the changes made in the demographic maintenance tool. Click **Exit** to return to the secure Provider page.

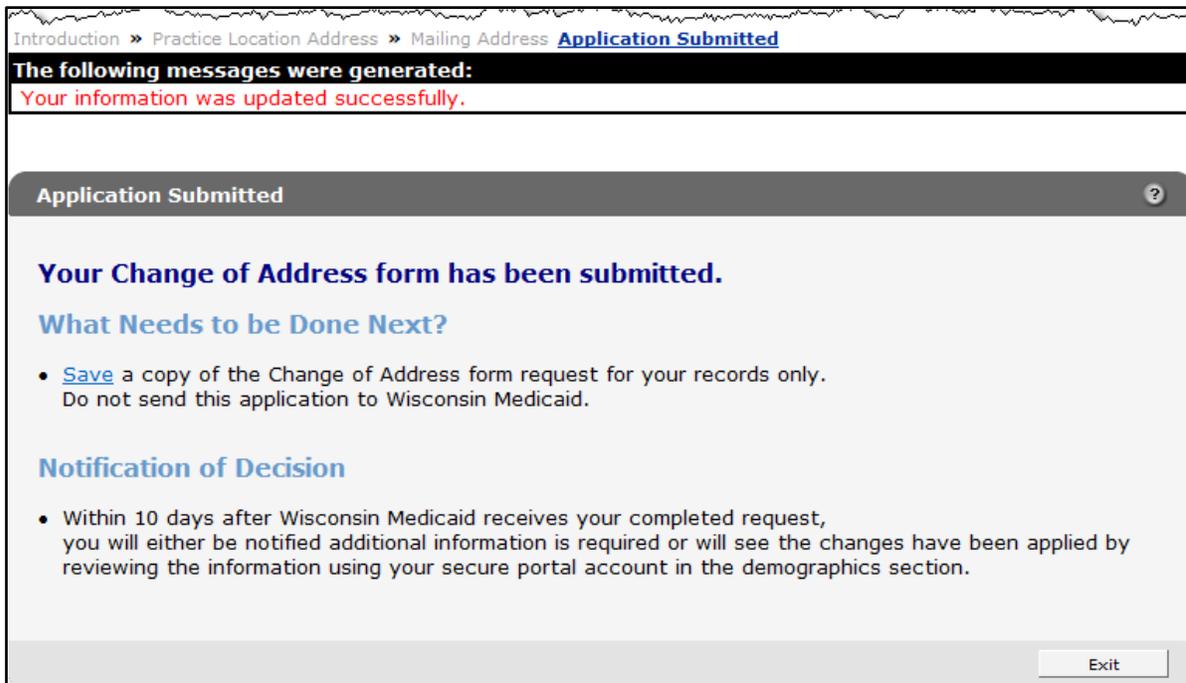


Figure 46 Application Submitted Panel

If the entered information is updated automatically, a confirmation message will be displayed above the panel.

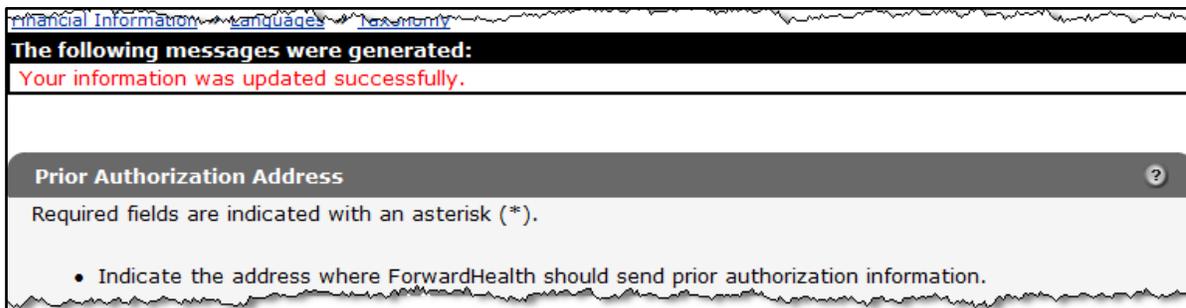


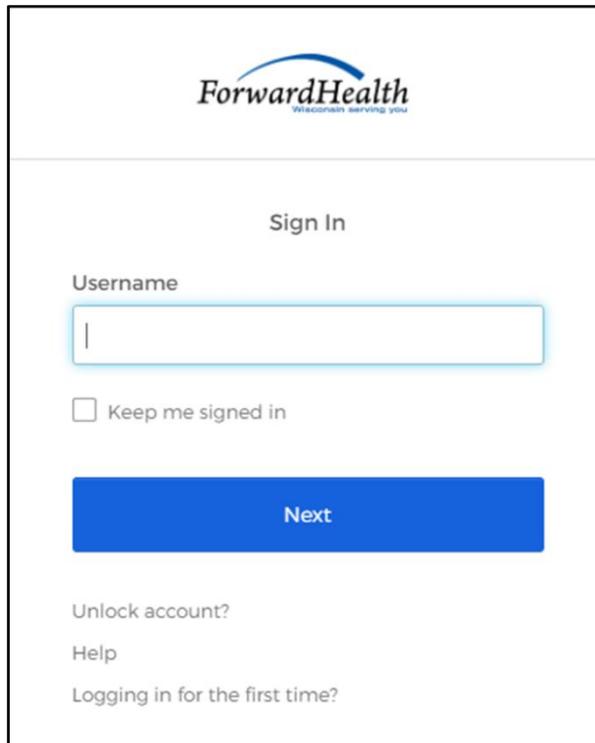
Figure 47 Confirmation Message

5 Maintenance

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

5.1 Change Account Information

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



ForwardHealth
WISCONSIN SERVING YOU

Sign In

Username

Keep me signed in

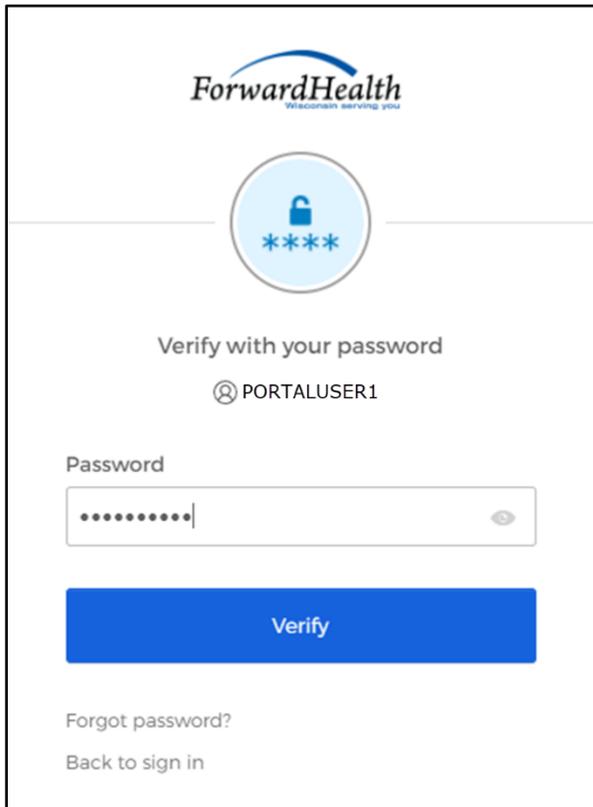
Next

Unlock account?
Help
Logging in for the first time?

Figure 48 Sign In Box

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

A Verify with your password box will be displayed.



ForwardHealth
Mission serving you

Verify with your password

PORTALUSER1

Password

.....

Verify

Forgot password?

Back to sign in

Figure 49 Verify With Your Password Box

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

The secure Provider homepage will be displayed.

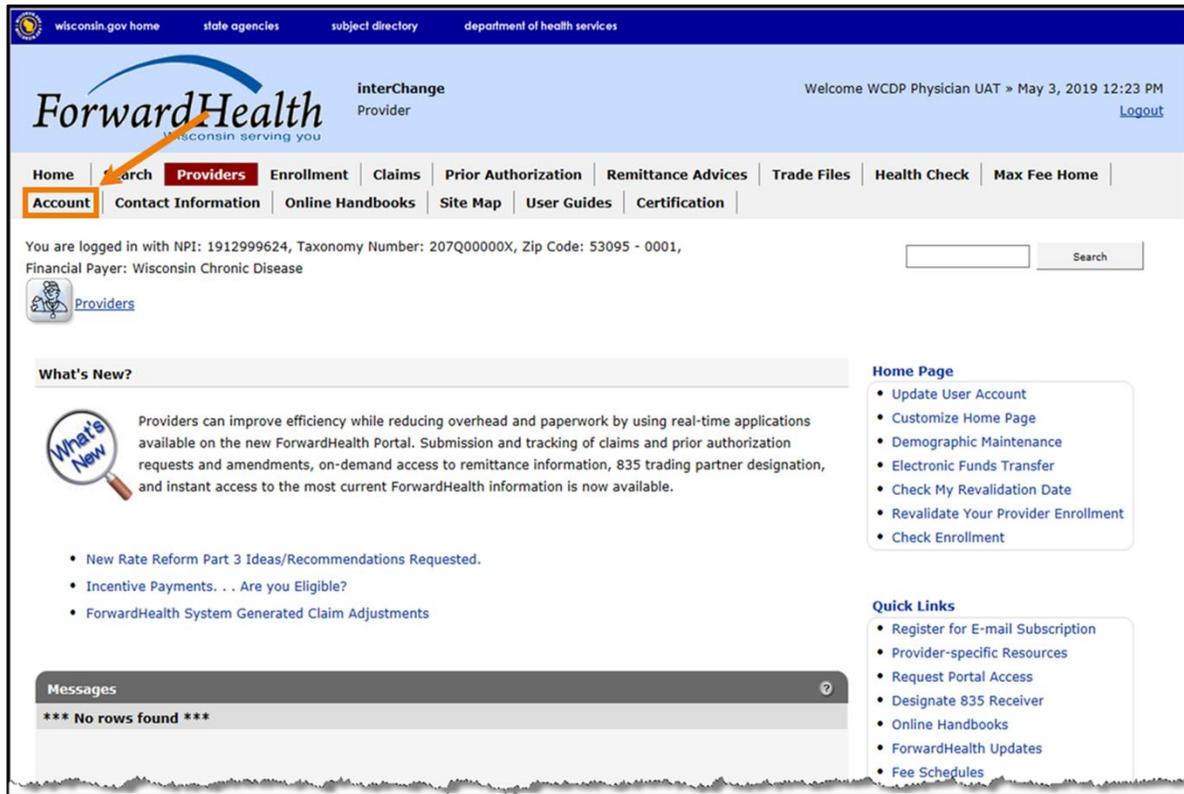


Figure 50 Secure Provider Homepage

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

Account Home

From this page, authorized users can manage their user account(s) for the ForwardHealth Portal. Users may setup, update, and maintain account login credentials, change/reset passwords, assign roles for authorized employees, and read and manage messages pertaining to their account. Click on the link from those provided below to select the action you wish to perform. Consult the Account User Guide for specific instructions on each task.

What would you like to do?

- [Maintenance](#)
- [Messages](#)
- [Change Password](#)
- [Clerk Maintenance](#)
- [Clerk Last Logon](#)
- [Switch Organization](#)
- [Add Organization](#)
- [View the Account User Guide](#)

Figure 51 Account Homepage

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

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

Account Maintenance ?

Required fields are indicated with an asterisk (*).

User Profile

User Name

Contact First Name*

Contact Last Name*

Telephone Number*

E-Mail*

Confirm E-Mail*

Figure 52 Account Maintenance Panel

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

Account Maintenance ?

Required fields are indicated with an asterisk (*).

Verify User Account

Please verify your account with one of the following methods.

Email j****2@gainwelltechnologies.com

Text Message +1 XXX-XXX-3877

Figure 53 Account Maintenance Panel – Verify User Account

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



Account Maintenance ?

Required fields are indicated with an asterisk (*).

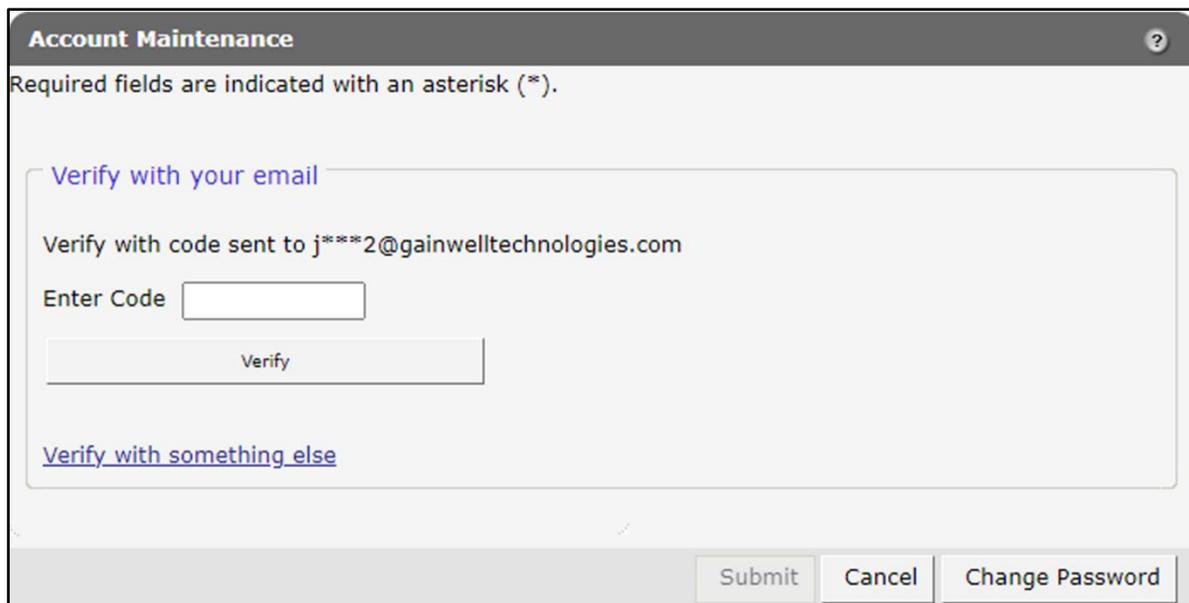
[Verify with your email](#)

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

[Verify with something else](#)

Figure 54 Account Maintenance Panel – Email or Text Message Verification

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



Account Maintenance ?

Required fields are indicated with an asterisk (*).

[Verify with your email](#)

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

Enter Code

[Verify with something else](#)

Figure 55 Account Maintenance Panel – Enter Code

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

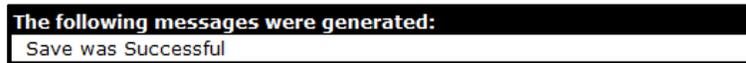


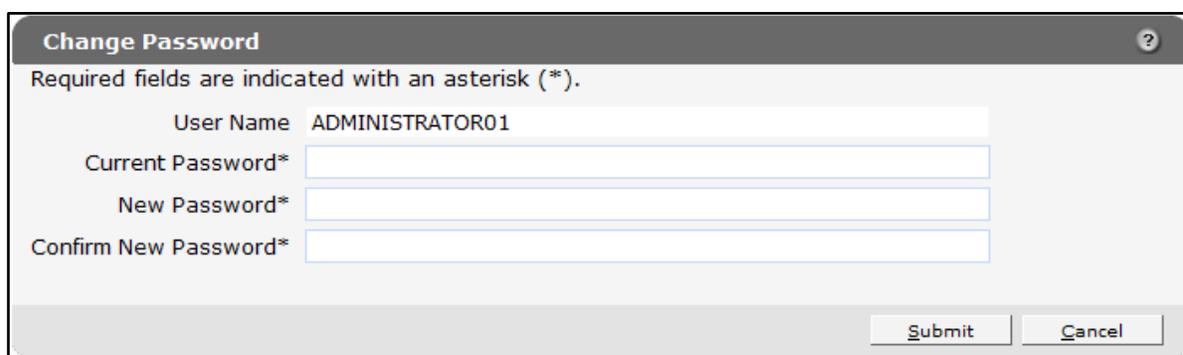
Figure 56 Confirmation Message

6 Confirmation Message Change Password

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

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

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



Change Password ?

Required fields are indicated with an asterisk (*).

User Name ADMINISTRATOR01

Current Password*

New Password*

Confirm New Password*

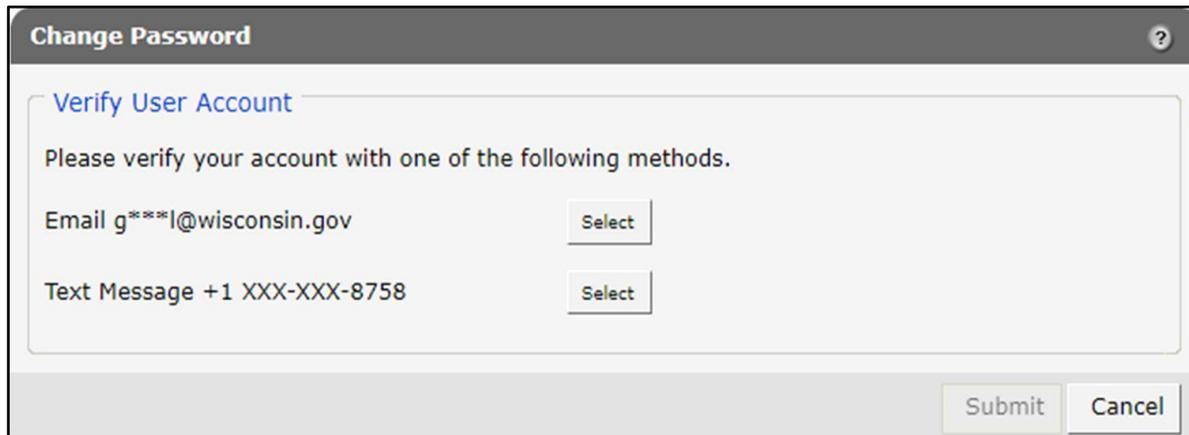
Submit Cancel

Figure 57 Change Password Page

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

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

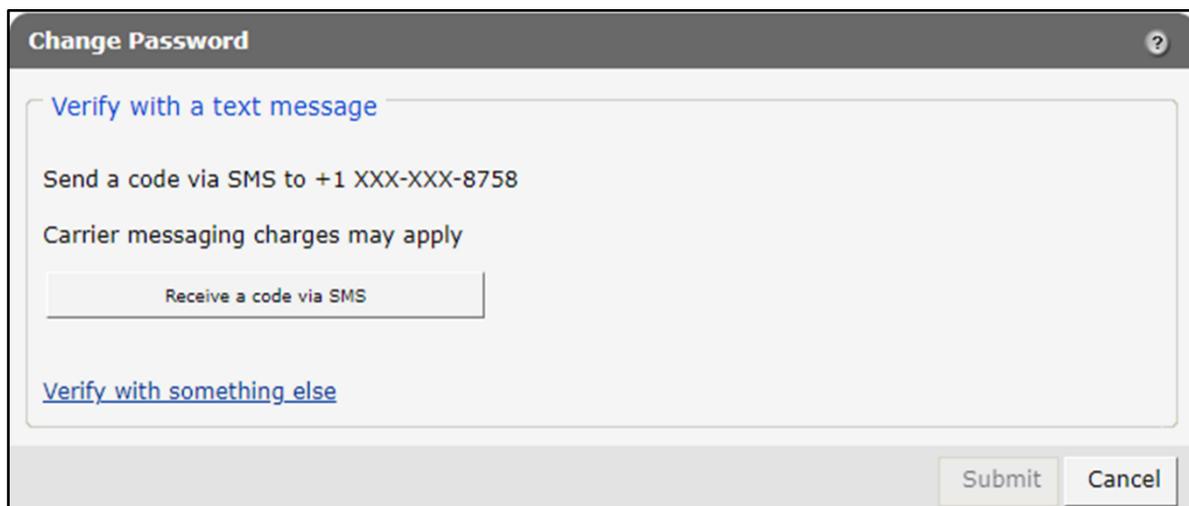
- Click **Submit**. A Change Password verification panel will be displayed.



The screenshot shows a 'Change Password' dialog box with a dark header and a light body. The title 'Change Password' is in the top left, and a help icon (?) is in the top right. The main content area is titled 'Verify User Account' in blue. Below this, it says 'Please verify your account with one of the following methods.' There are two options: 'Email g****@wisconsin.gov' and 'Text Message +1 XXX-XXX-8758'. Each option has a 'Select' button to its right. At the bottom right of the dialog, there are 'Submit' and 'Cancel' buttons.

Figure 58 Change Password Panel – Verify User Account

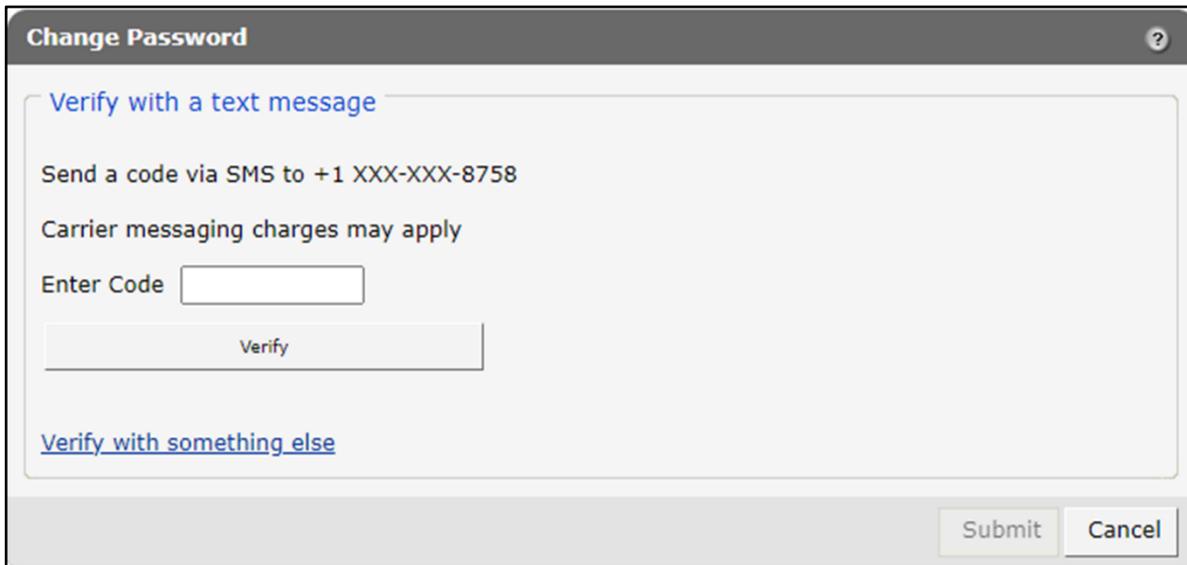
- Select the email or text message to verify the account by clicking **Select** after the appropriate method. A Change Password verification panel will be displayed.



The screenshot shows a 'Change Password' dialog box with a dark header and a light body. The title 'Change Password' is in the top left, and a help icon (?) is in the top right. The main content area is titled 'Verify with a text message' in blue. Below this, it says 'Send a code via SMS to +1 XXX-XXX-8758' and 'Carrier messaging charges may apply'. There is a button labeled 'Receive a code via SMS'. At the bottom left of the dialog, there is a blue link 'Verify with something else'. At the bottom right, there are 'Submit' and 'Cancel' buttons.

Figure 59 Change Password Panel – Email or Text Message Verification

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



The screenshot shows a web interface titled "Change Password" with a help icon in the top right corner. The main content area is a light gray box with a rounded top-left corner. At the top of this box is a blue link "Verify with a text message". Below it, the text reads "Send a code via SMS to +1 XXX-XXX-8758" and "Carrier messaging charges may apply". There is a label "Enter Code" followed by a text input field. Below the input field is a "Verify" button. At the bottom of the box is another blue link "Verify with something else". At the bottom right of the entire panel are "Submit" and "Cancel" buttons.

Figure 60 Change Password Panel – Enter Code

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

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

Figure 61 Confirmation Message

7 Clerk Maintenance

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

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

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

Accounts will automatically be removed after 90 days of inactivity.

On the Account homepage, 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 a separate "Ext." field), and E-Mail. To the right of these fields are two buttons: "Remove Clerk" and "Reset Password".

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

Figure 62 Clerk Maintenance Search Panel

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

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

7.1 Add a Clerk

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

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

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

The form is divided into two main sections:

- Clerk Details:** This section contains several input fields, all marked with an asterisk to indicate they are required:
 - User Name* [Search]
 - Contact First Name*
 - Contact Last Name*
 - Telephone Number* (with an "Ext." field next to it)
 - E-Mail*
 - Confirm E-Mail*
 - Password*
 - Confirm Password*
- Clerk Roles:** This section features two columns: "Available Roles" and "Assigned Roles". The "Available Roles" column contains a list box with "Demographic Maint" selected. Between the columns are four arrow buttons: a single left arrow (<), a double left arrow (<<), a single right arrow (>), and a double right arrow (>>). Below the list boxes, there is a checkbox labeled "Clerk Administrator".

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

Figure 63 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 User Name field. The User Name Search box will be displayed.

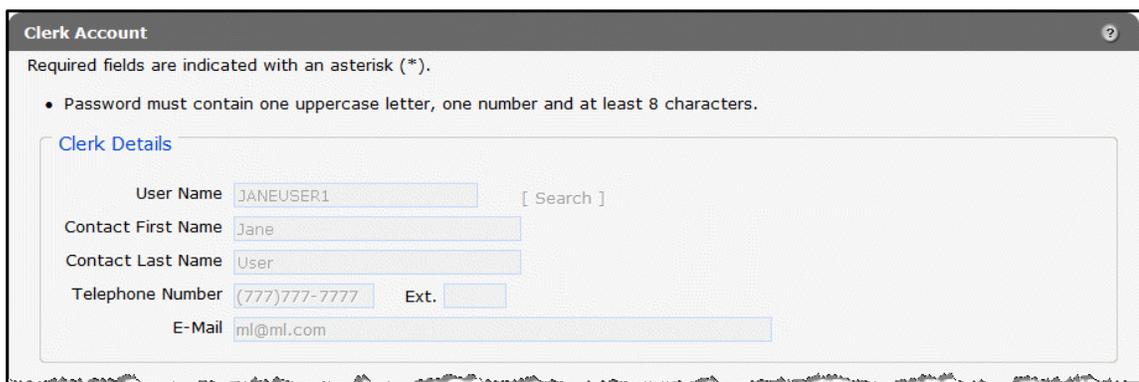
Figure 64 User Name Search Box

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

User Name	First Name	Last Name
SHAWN99	Shawn	Smith

Figure 65 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.



Clerk Account

Required fields are indicated with an asterisk (*).

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

Clerk Details

User Name [Search]

Contact First Name

Contact Last Name

Telephone Number Ext.

E-Mail

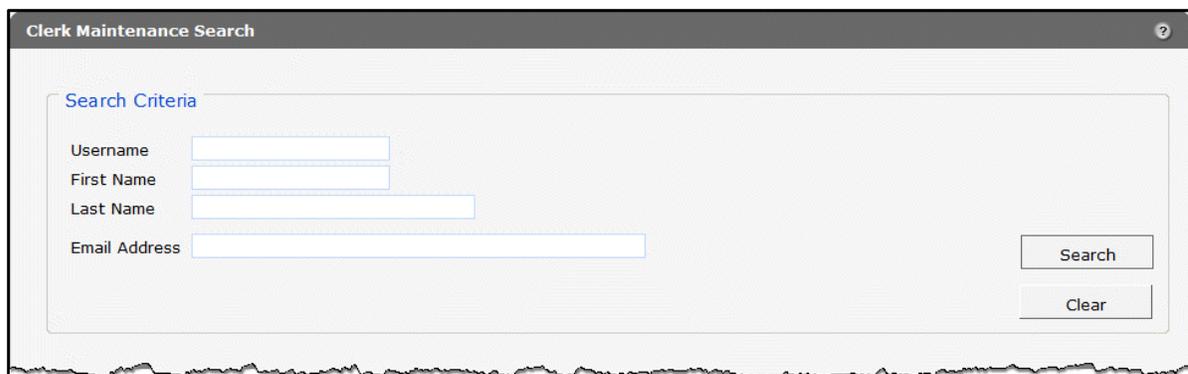
Figure 66 Clerk Account Information Auto-populated on Clerk Account Panel

2. Proceed to one of the following sections once clerk details have been entered or populated:
 - Step 2 of [Section 7.3 Add Demographic Maintenance Role to a Clerk](#) of this guide
 - Step 1 of [Section 7.5 Assign a Clerk Administrator](#) of this guide

7.2 Search for a Clerk

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

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



Clerk Maintenance Search

Search Criteria

Username

First Name

Last Name

Email Address

Figure 67 Search Criteria Section

2. Click **Search**.

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

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

Figure 68 Search Results Section

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

Search Results

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

Selected Clerk

Username: PROVIDERIM

Contact First Name: IM

Contact Last Name: Provider

Telephone Number: (999)999-9999 Ext.

E-Mail: ml@ml.com

Remove Clerk Reset Password

Next Add Clerk Cancel

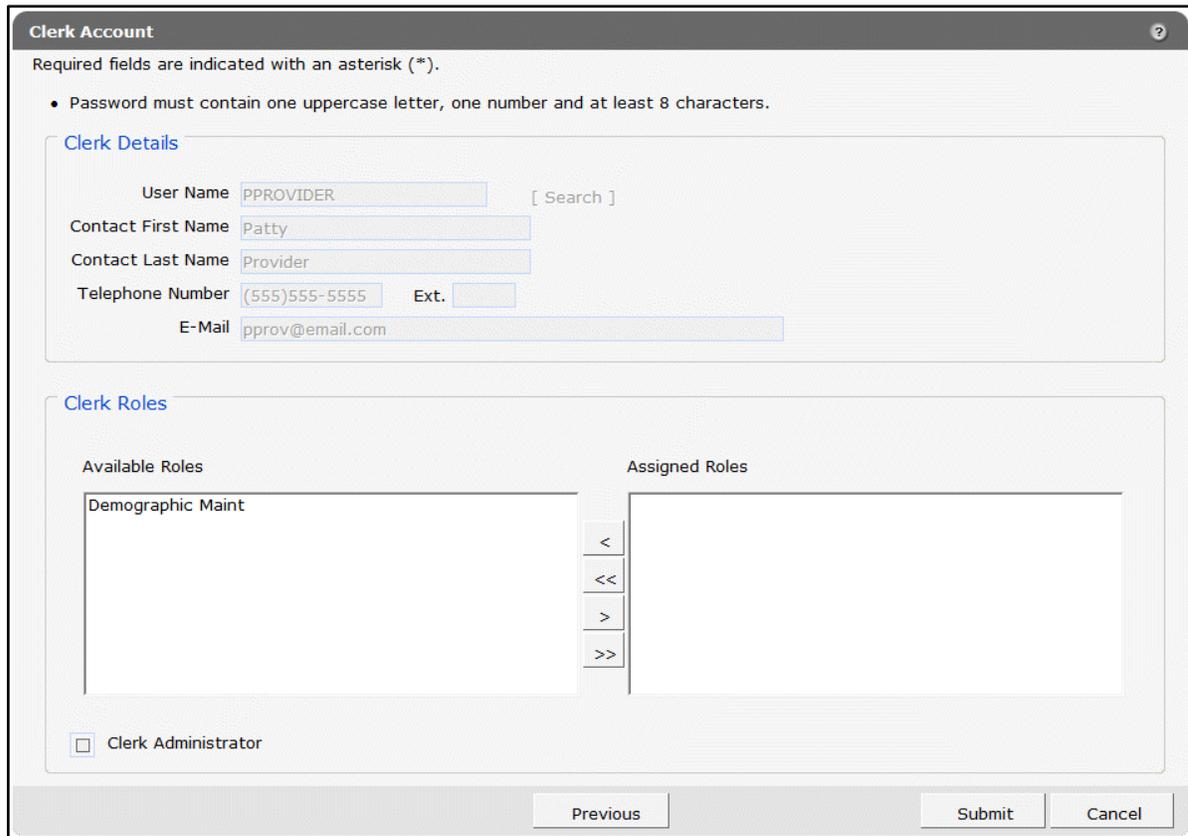
Figure 69 Search Results and Selected Clerk Sections

- Proceed to one of the following sections once a clerk has been selected:
 - [Section 7.3 Add Demographic Maintenance Role to a Clerk](#)
 - [Section 7.4 Remove a Role from a Clerk](#)
 - [Section 7.5 Assign a Clerk Administrator](#)
 - [Section 7.6 Reset a Clerk’s Password](#)
 - [Section 7.7 Delete a Clerk Account](#)

7.3 Add Demographic Maintenance Role to a Clerk

The Clerk Roles function allows a user to add the demographic maintenance role to new or existing clerks.

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



Clerk Account ?

Required fields are indicated with an asterisk (*).

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

Clerk Details

User Name [Search]

Contact First Name

Contact Last Name

Telephone Number Ext.

E-Mail

Clerk Roles

Available Roles

Demographic Maint

Assigned Roles

< << > >>

Clerk Administrator

Previous Submit Cancel

Figure 70 Clerk Account Panel

- In the “Clerk Roles” section, select the Demographic Maint role from the Available Roles box.

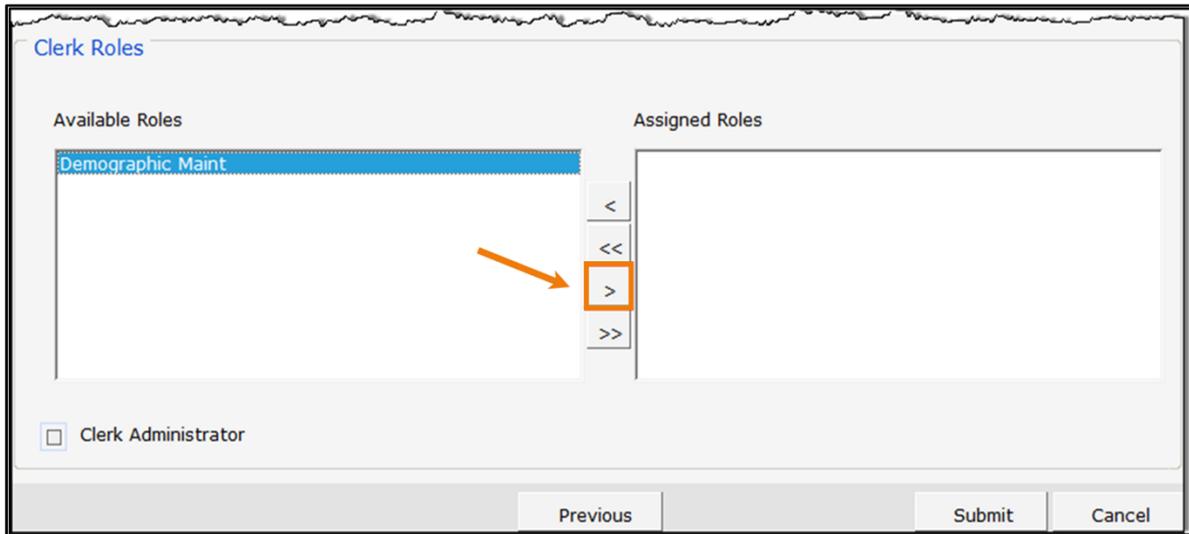


Figure 71 Clerk Roles Section with Available Roles

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

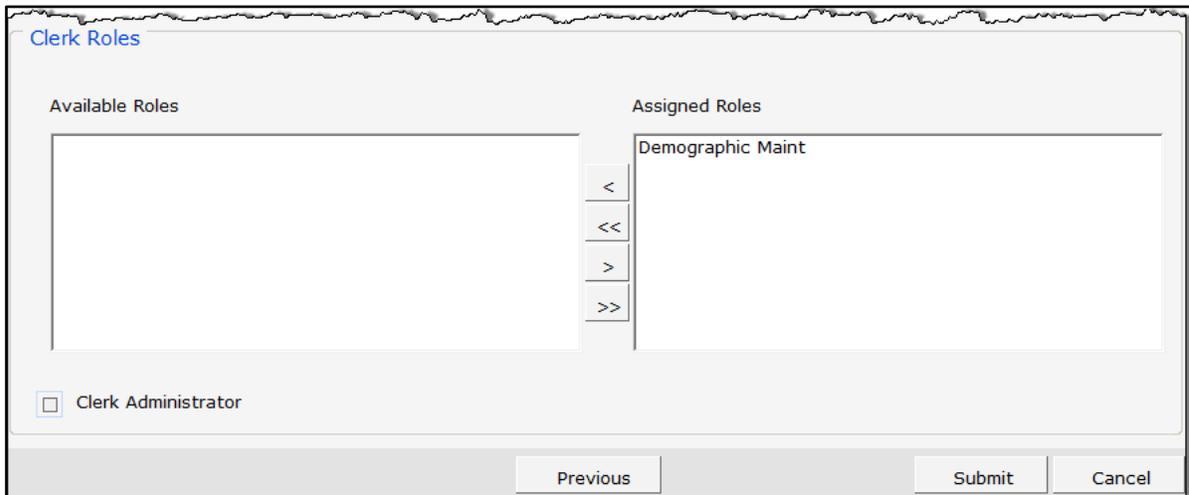


Figure 72 Clerk Roles Section with Assigned Roles

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



Figure 73 User Successfully Updated Message

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

7.4 Remove a Role from a Clerk

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

The screenshot shows the 'Clerk Account' window. 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.' Below this are two sections: 'Clerk Details' and 'Clerk Roles'. The 'Clerk Details' section contains input fields for User Name (pPROVIDER), Contact First Name (Patty), Contact Last Name (Provider), Telephone Number ((555)555-5555), Ext., and E-Mail (pprov@email.com). The 'Clerk Roles' section has two boxes: 'Available Roles' (empty) and 'Assigned Roles' (containing 'Demographic Maint'). Between these boxes are navigation buttons: '<', '<<', '>', and '>>'. At the bottom left of the 'Clerk Roles' section is a checkbox for 'Clerk Administrator'. At the bottom of the window are 'Previous', 'Submit', and 'Cancel' buttons.

Figure 74 Clerk Account Panel.

2. In the “Clerk Roles” section, select a role from the Assigned Roles box.

This screenshot is a close-up of the 'Clerk Roles' section from the previous image. The 'Assigned Roles' box now contains the role 'Demographic Maint', which is highlighted in blue. An orange arrow points to the '<' button located between the 'Available Roles' and 'Assigned Roles' boxes, indicating the action to remove the selected role.

Figure 75 Clerk Roles Section with Assigned Roles

3. Click **<**. The selected role will be transferred to the Available Roles box.

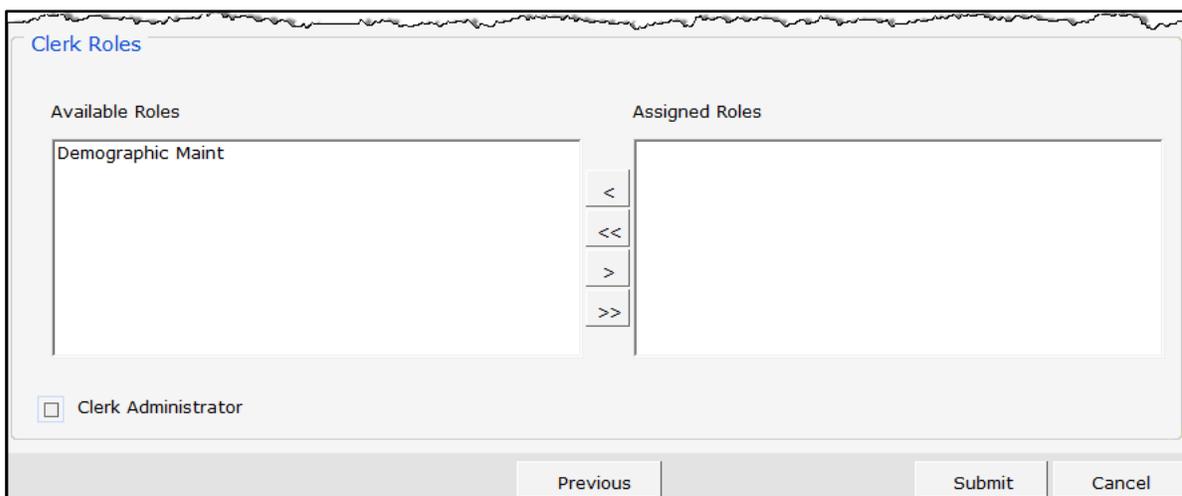


Figure 76 Clerk Roles Section with Role Removed

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



Figure 77 Confirmation Message

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

7.5 Assign a Clerk Administrator

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

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

The screenshot shows the 'Clerk Account' panel. At the top, it states 'Required fields are indicated with an asterisk (*)'. Below this, a bullet point indicates: 'Password must contain one uppercase letter, one number and at least 8 characters.' The 'Clerk Details' section contains the following fields: 'User Name' (pPROVIDER), 'Contact First Name' (Patty), 'Contact Last Name' (Provider), 'Telephone Number' ((555)555-5555), 'Ext.' (empty), and 'E-Mail' (pprov@email.com). The 'Clerk Roles' section has two columns: 'Available Roles' (empty) and 'Assigned Roles' (Demographic Maint). Between the columns are navigation buttons: '<', '<<', '>', and '>>'. At the bottom of the 'Clerk Roles' section is a checkbox labeled 'Clerk Administrator' which is currently unchecked. At the bottom of the entire panel are 'Previous', 'Submit', and 'Cancel' buttons.

Figure 78 Clerk Account Panel

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

This screenshot is a close-up of the 'Clerk Roles' section from the previous figure. The 'Available Roles' column is empty, and the 'Assigned Roles' column contains 'Demographic Maint'. The 'Clerk Administrator' checkbox is now checked and is highlighted with an orange border. The navigation buttons between the columns remain the same. At the bottom of this section are 'Previous', 'Submit', and 'Return to Search' buttons.

Figure 79 Clerk Roles Section with Clerk Administrator Checked

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



Figure 80 Confirmation Message

7.6 Reset a Clerk's Password

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

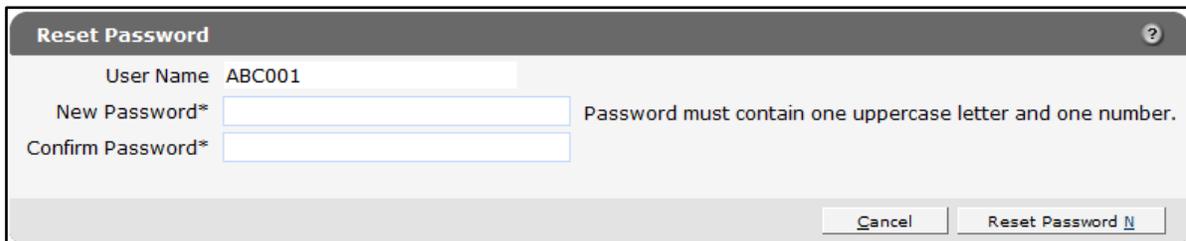
A screenshot of the "Reset Password" form. The form has a title bar with "Reset Password" and a help icon. Below the title bar, there are three input fields: "User Name" with the value "ABC001", "New Password*" (empty), and "Confirm Password*" (empty). To the right of the "New Password*" field, there is a note: "Password must contain one uppercase letter and one number." At the bottom right of the form, there are two buttons: "Cancel" and "Reset Password N".

Figure 81 Reset Password Page

2. Enter the new password (twice for confirmation). The password must be between nine-15 characters and must contain three different types of characters such as uppercase letters, lowercase letters, special characters, or numbers. The password must be unique and cannot contain information from the user name, contact first name, or contact last name.
3. Click **Reset Password**. A confirmation message will be displayed at the top of the page.

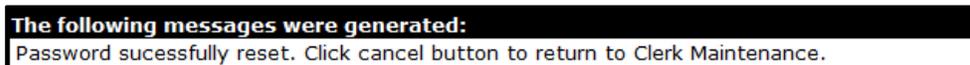


Figure 82 Confirmation Message

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

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

7.7 Delete a Clerk Account

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

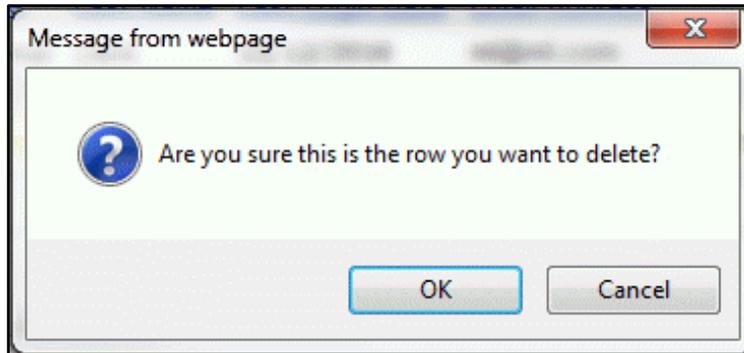


Figure 83 Dialog Box

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



Figure 84 Confirmation Message

7.8 Clerk Account Log in for First Time

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

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

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

- Account password
- Email address

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

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

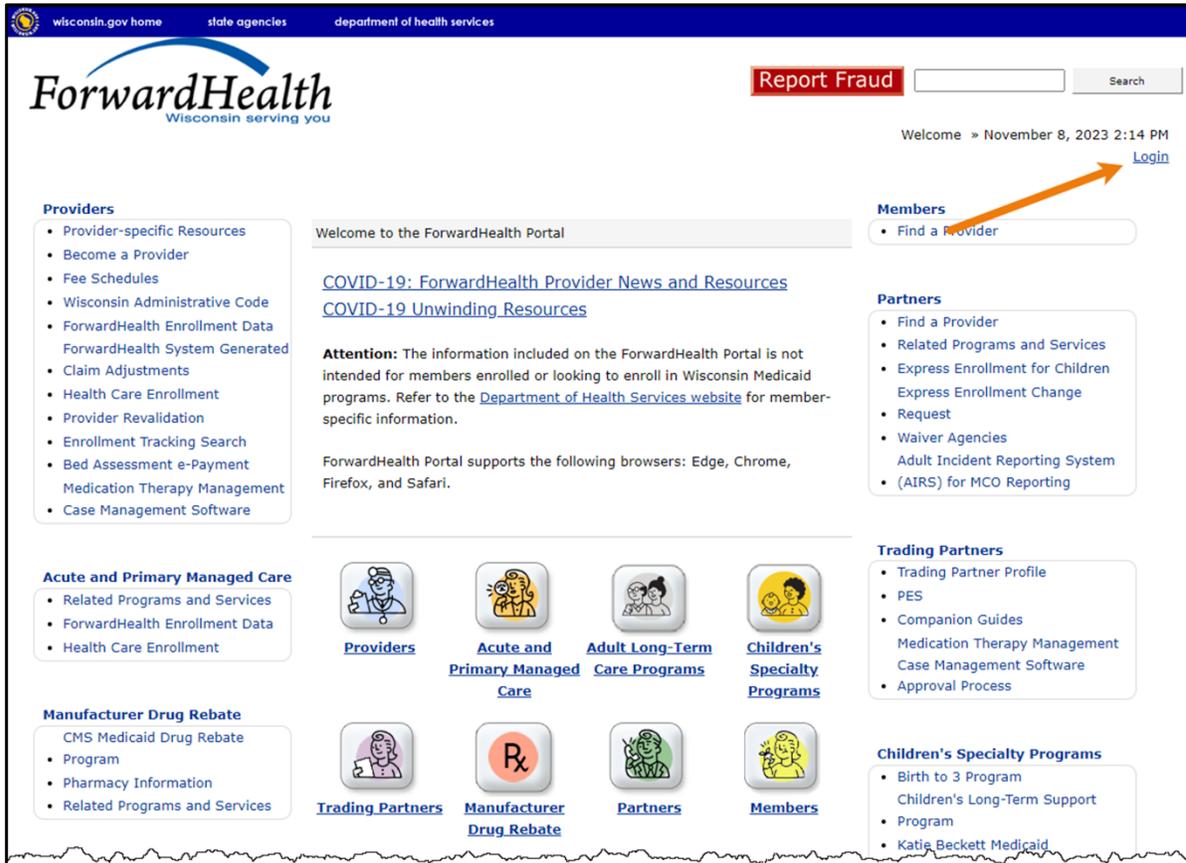
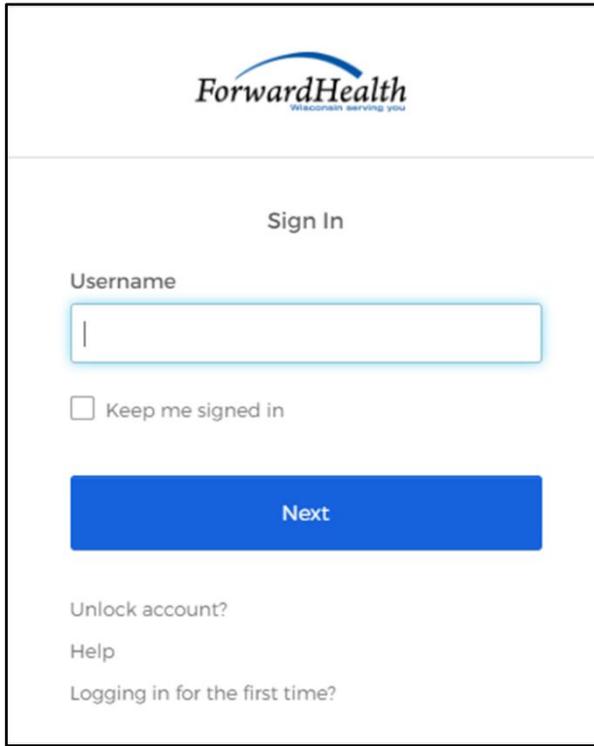


Figure 85 ForwardHealth Portal Page

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



ForwardHealth
WISCONSIN serving you

Sign In

Username

Keep me signed in

Next

[Unlock account?](#)

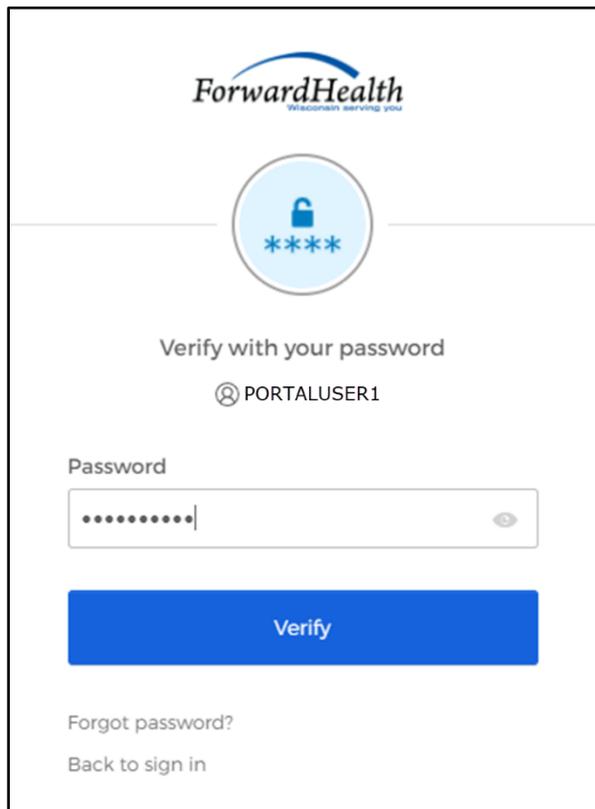
[Help](#)

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

Figure 86 Sign In Box

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

A Verify with your password box will be displayed.



ForwardHealth
Mission serving you

Verify with your password

PORTALUSER1

Password

.....|

Verify

[Forgot password?](#)

[Back to sign in](#)

Figure 87 Verify With Your Password Box

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

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.

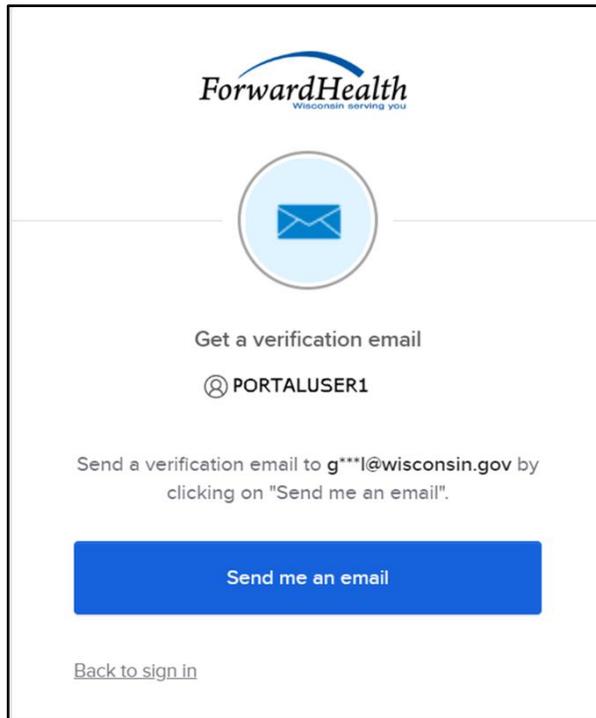


Figure 88 Get a Verification Email Box

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.

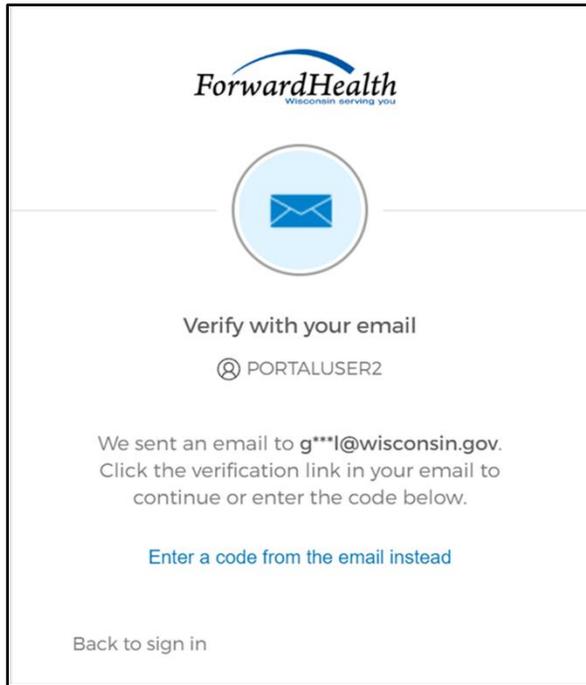


Figure 89 Verify With Your Email Box

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

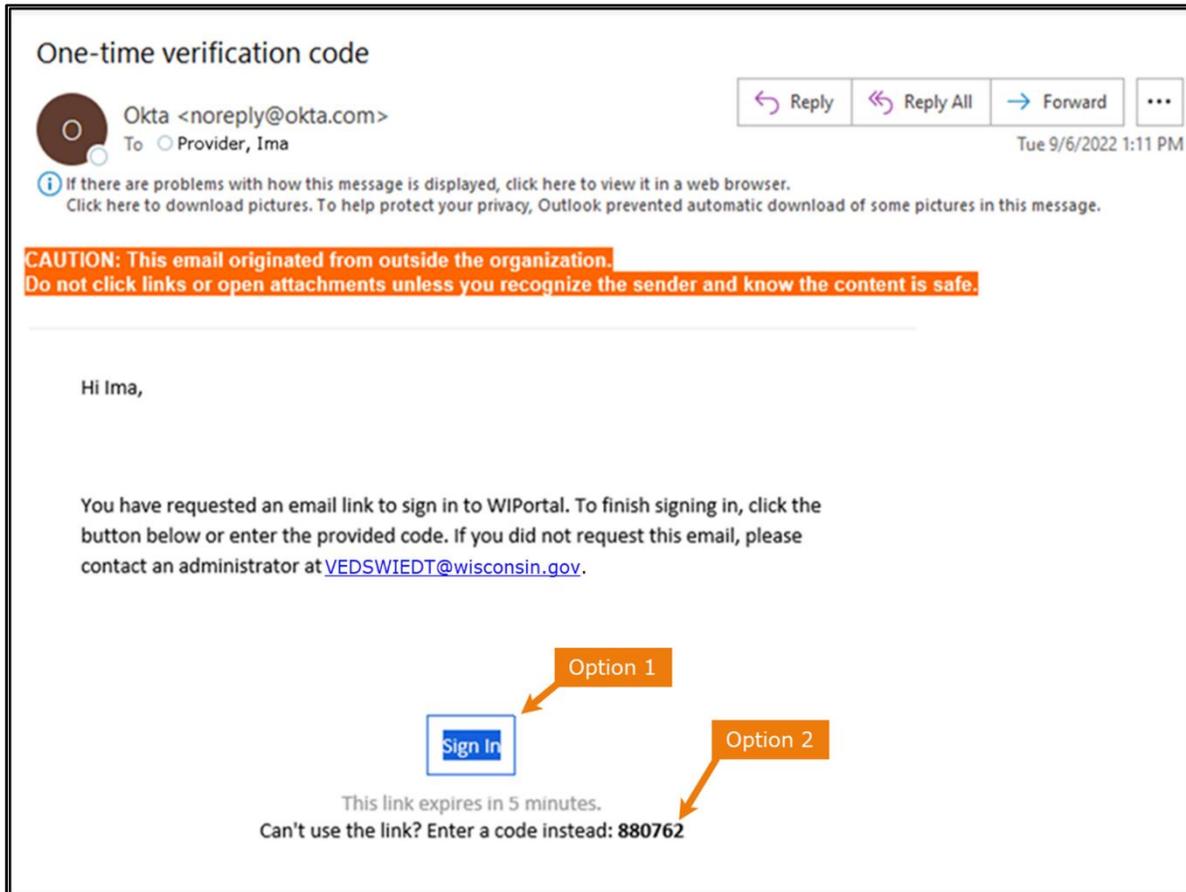
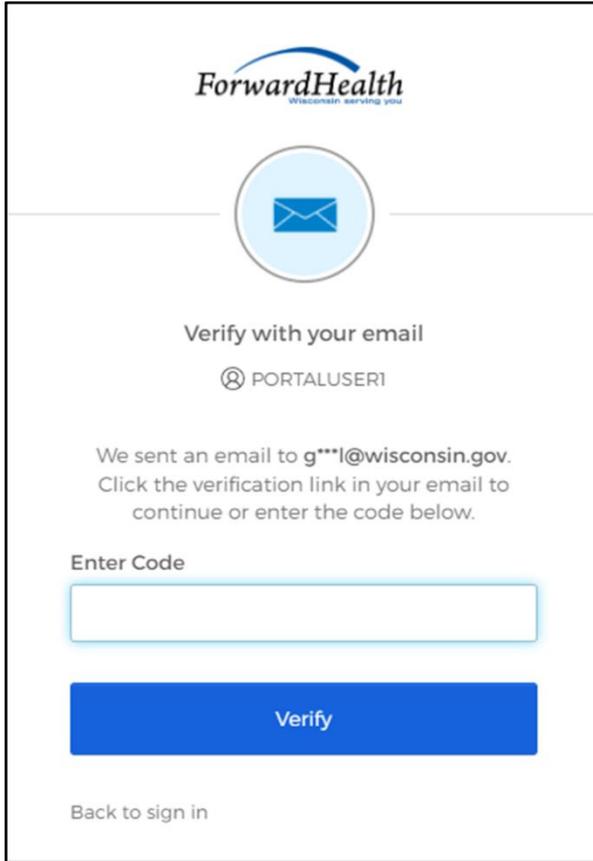


Figure 90 One-Time Verification Code Email

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 91 Verify With Your Email Box

A Set up security methods box will be displayed.

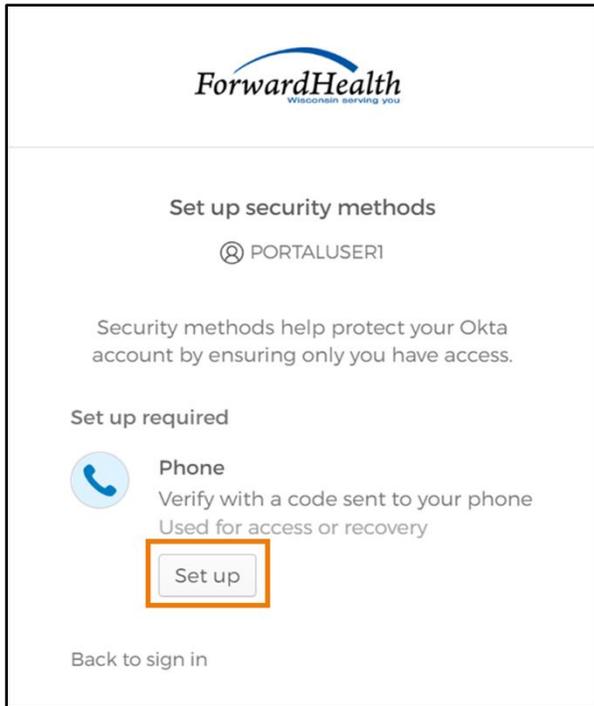
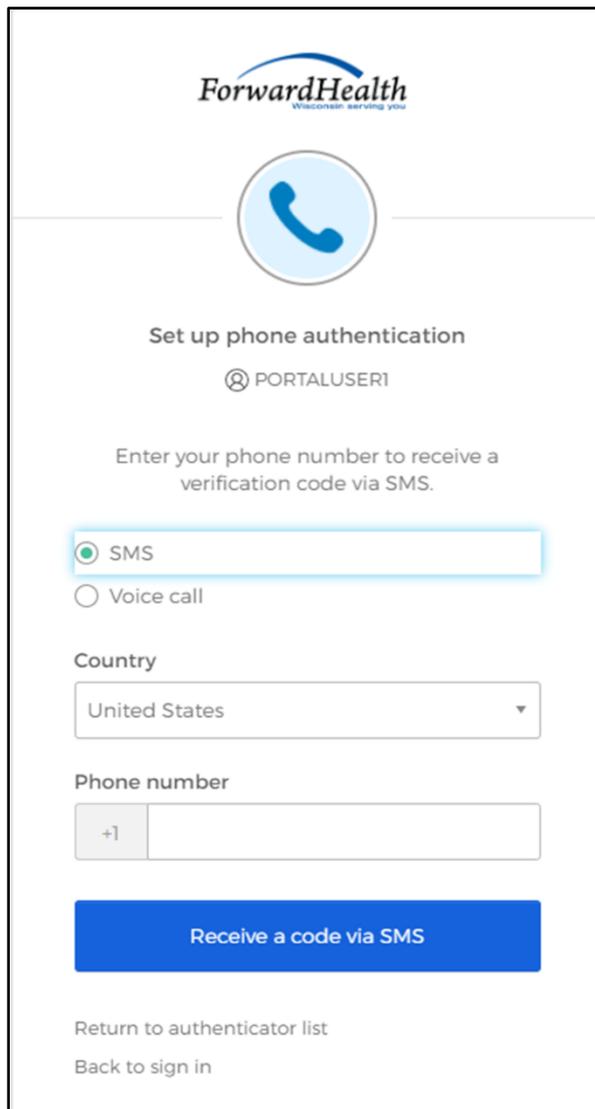


Figure 92 Set Up Security Methods Box

10. Click **Set up**.

A Set up phone authentication box will be displayed.

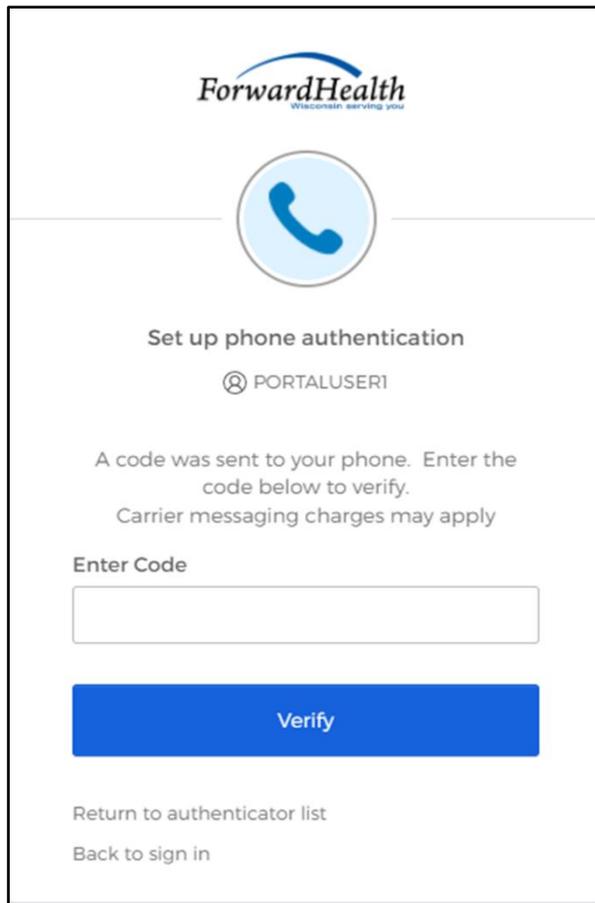


The screenshot shows a web form for setting up phone authentication. At the top is the ForwardHealth logo with the tagline 'Wisconsin, serving you'. Below the logo is a blue telephone handset icon inside a circle. The main heading is 'Set up phone authentication' followed by the user ID 'PORTALUSER1'.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

Figure 93 Set Up Phone Authentication Box

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

A Set up phone authentication box will be displayed.



ForwardHealth
Wisconsin serving you



Set up phone authentication
PORTALUSER1

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

Enter Code

Verify

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

Figure 94 Set Up Phone Authentication Box

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

8 Clerk Last Logon

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

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

Clerk Last Logon

Search Criteria

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

First Name

Last Name

User Name

Search Cancel

List of clerks

*** No rows found ***

Remove selected Clerks Cancel

Figure 95 Clerk Maintenance Search Panel

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

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

8.1 Search and Remove a Clerk Account

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

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

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

Clerk Last Logon

Search Criteria

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

First Name

Last Name

User Name

Search Cancel

Figure 96 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 97 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.

9 Messages

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

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

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



Figure 98 Messages Page

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

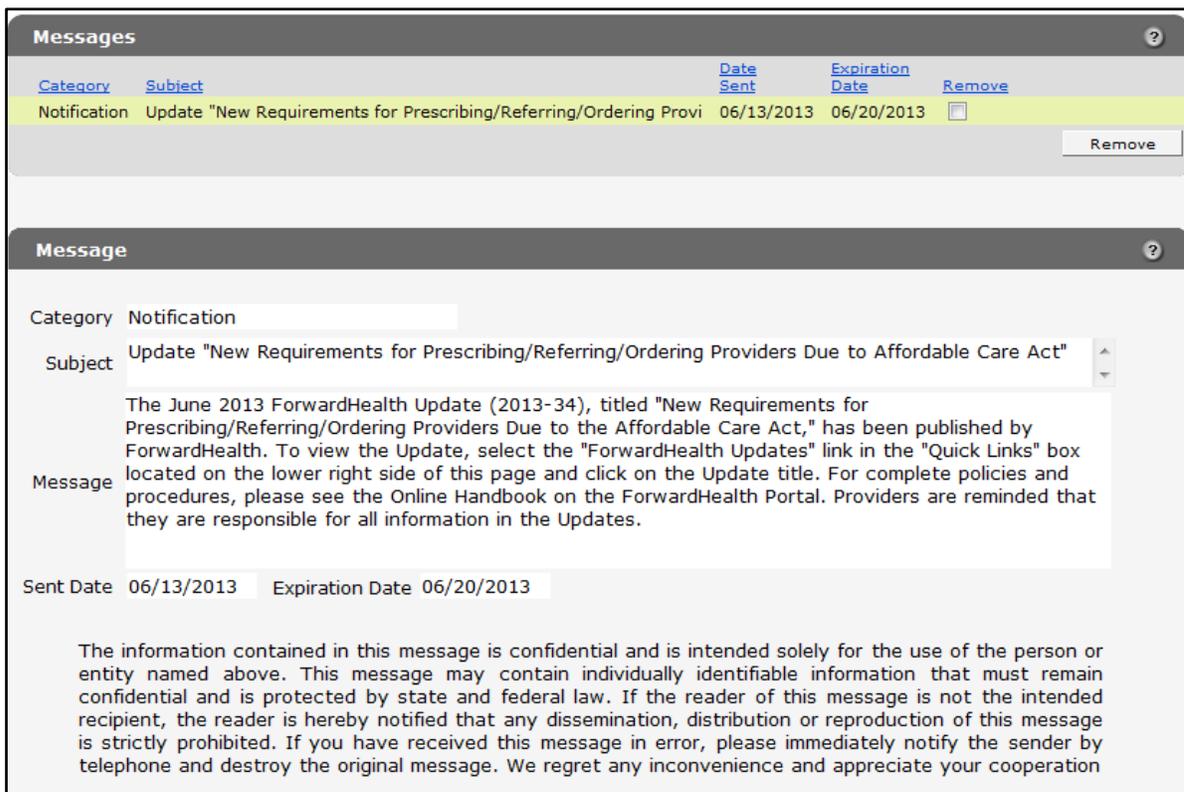


Figure 99 Message Section

9.1 Delete a Message

1. Check the **Remove** box next to the message.

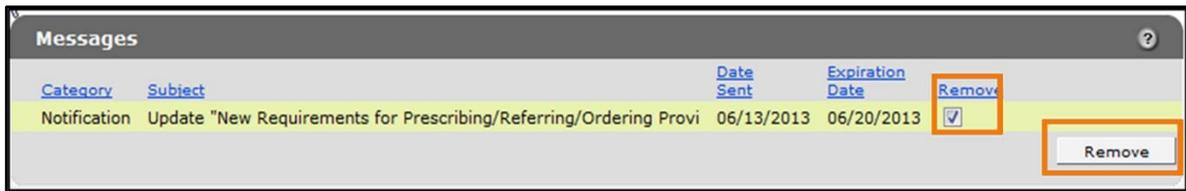


Figure 100 Remove Message

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