

# User Guide

## ForwardHealth Partner Portal

March 11, 2024



WISCONSIN DEPARTMENT  
*of* HEALTH SERVICES

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# 1 Introduction

## 1.1 Introduction

This User Guide explains how to navigate and use the public and secure areas of the Partner area of the Portal.

The public Partner area of the ForwardHealth Portal provides users with online functionality and the ability to access real-time information.

Depending on the partner role under which the user is logged in, users will have differing functions available to them.

## 1.2 Purpose

The purpose of this document is to present users with an overview of the components that make up the Partner area of the Portal, provide instruction on how to navigate and perform basic functions within the system.

## 1.3 Key Terms and Concepts

### 1.3.1 ForwardHealth

ForwardHealth brings together many state health care programs with the goal of creating efficiencies for providers and other stakeholders while improving health care outcomes for enrolled members. These programs include the following:

- BadgerCare Plus
- Wisconsin AIDS/HIV Drug Assistance Program (ADAP)
- Wisconsin Medicaid, including Family Planning Only Services
- Wisconsin Well Woman Program (WWWP)
- Wisconsin Well Woman Medicaid (WWWMA)
- SeniorCare
- Wisconsin Chronic Disease Program (WCDP)
- BadgerCare Plus and Medicaid managed care programs

### 1.3.2 Key Terms

- *Member* — A member represents an individual enrolled in any of the ForwardHealth health care programs.

- *Member ID* — All members are assigned an identification number. The number is assigned from the Master Client Index (MCI) and does not include the Social Security number. The MCI ID is an identification number used for all state government programs in which the member is enrolled.
- *Benefit Plan* — Type of plan that designates the benefits covered and is based on the member's medical status code. Members may be enrolled in multiple benefit plans concurrently.
  - Example: SeniorCare and Qualified Medicare Beneficiary (QMB).
  - Example: QMB and Elderly, Blind, and Disabled Medicaid.
- *Enrollment* — Enrollment is used any time a reference is made to a member who is eligible for benefits under any of the ForwardHealth programs. A member may also be enrolled in a managed care program.
- *Case* — There are two types of cases: Medicaid Management Information System (MMIS) cases and Client Assistance Re-Employment and Economic Support System (CARES) cases. A reference to a case is always MMIS unless a CARES case is specifically stated.
- *Fiscal Agent* — HP Enterprise Services is the ForwardHealth fiscal agent.

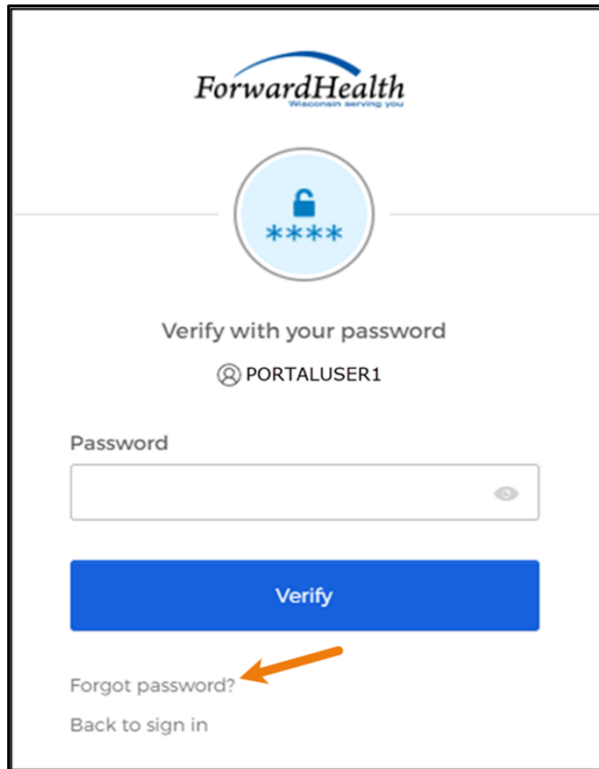
# 2 Passwords and Security

## 2.1 General Password Guidelines

- All Portal users can change their password at any time. After logging in, click the **Account** link on the secure Partner homepage and then click the **Change Password** link on the Account homepage.
- Portal account passwords expire every 60 days, and a message alert will prompt users to change them.
- Passwords must have at least nine characters.
- Passwords must contain at least one uppercase letter, one lowercase letter, and one number.
- Passwords should not contain a real name or the user's name.
- When resetting a password, none of the previous 24 passwords can be reused.

## 2.2 ForwardHealth interChange Password Problems

Users can click **Forgot your password?** in the Verify with your password box to utilize the account maintenance area of the Portal to resolve password issues. (See [Section 5.3 Resetting Passwords](#).) If unable to resolve a password problem using the reset password function, users may call the Portal Helpdesk at (866) 908-1363.



ForwardHealth  
Wisconsin serving you

\*\*\*\*

Verify with your password

PORTALUSER1

Password

Verify

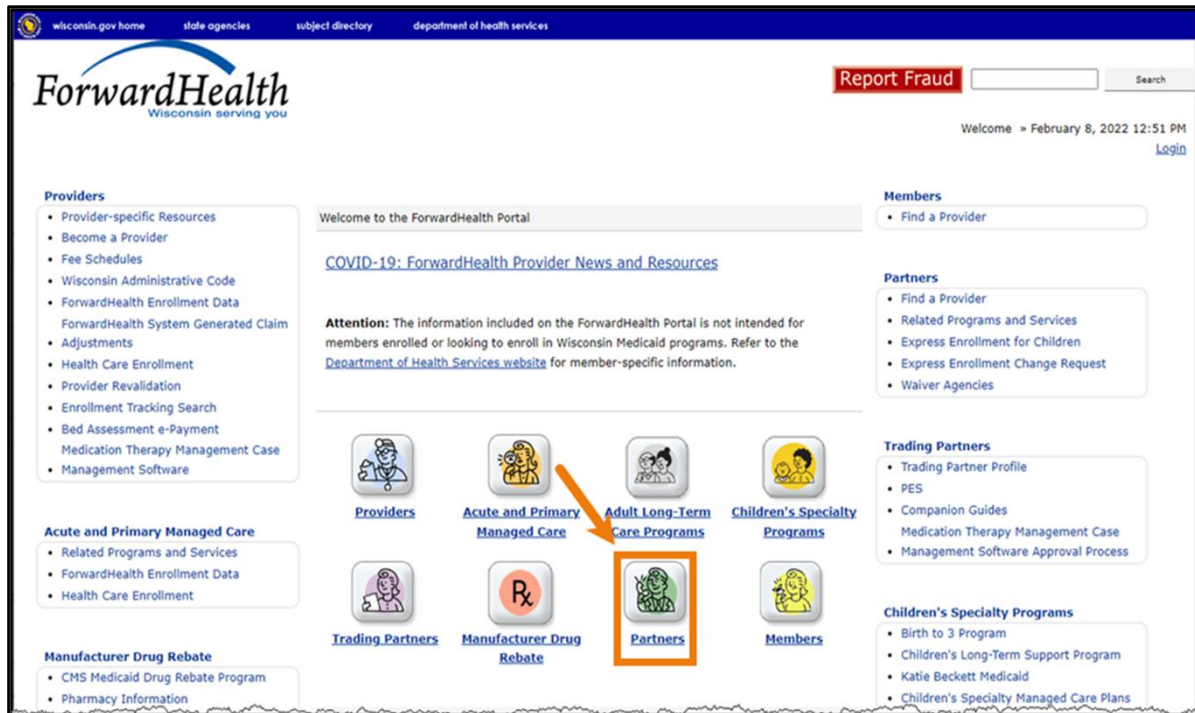
Forgot password?

Back to sign in

**Figure 1** ForwardHealth Portal Login

# 3 Getting Started

1. Access the Portal at <https://www.forwardhealth.wi.gov/>. The public Portal homepage will be displayed.

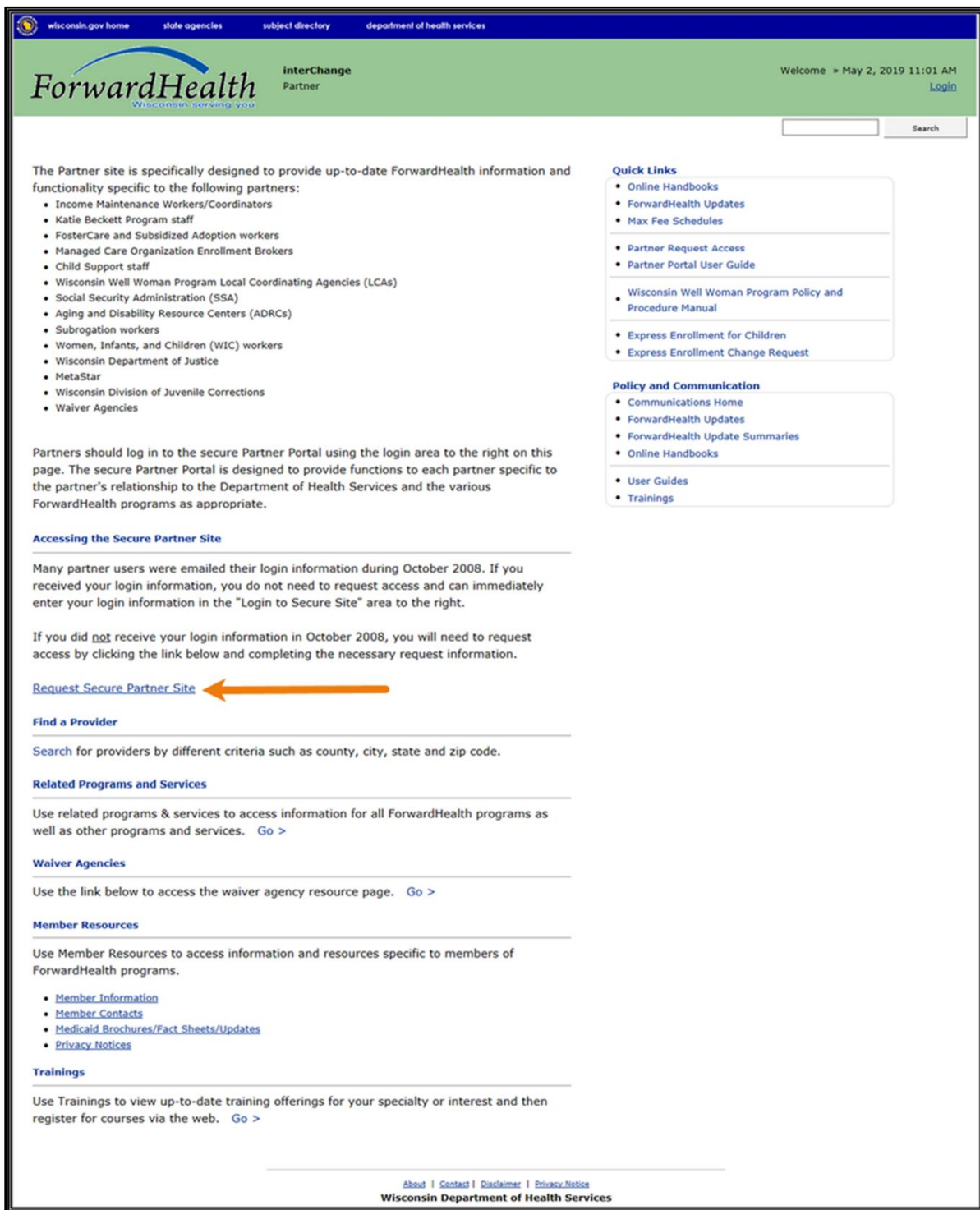


**Figure 2** ForwardHealth Public Portal Homepage

The Portal is divided into eight main areas as indicated by the eight icons in the middle of the page. Users can click the Partners icon or the link below to go to public Partner area of the Portal. Once a username has been assigned to a user, the Login link on the homepage can be used to go directly to the secure Partner homepage.



2. Click **Partners**. The public Partner homepage will be displayed.



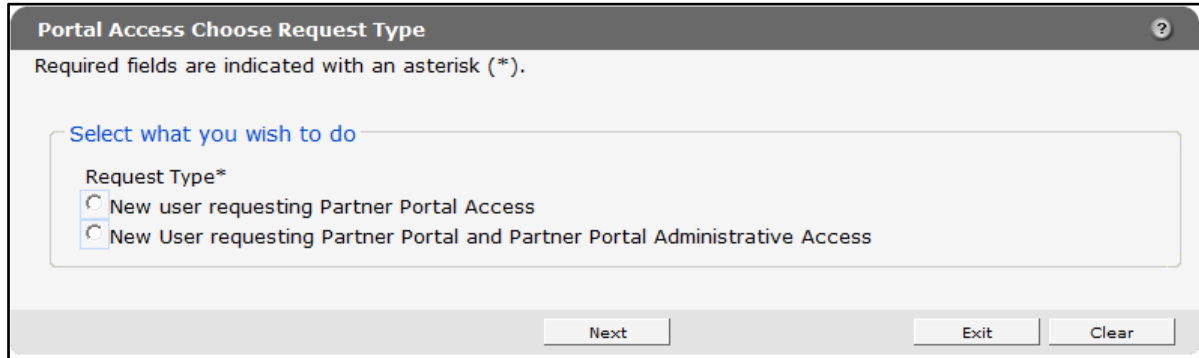
**Figure 3** Public Partner Homepage

This screen provides links to public information that can be accessed by all users, such as requesting access to the secure site, finding a provider, and accessing contact information for members interested in applying for ForwardHealth program benefits.

## 3.1 Requesting Secure Partner Site Access

1. On the public Partner homepage, scroll down to the “Accessing the Secure Partner Site” section.
2. Click **Request Secure Partner Site**. The Portal Access Choose Request Type page will be displayed.

Note: The Request Portal Access link in the Quick Links menu can also be used to request access to the secure site.



Portal Access Choose Request Type

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

Select what you wish to do

Request Type\*

New user requesting Partner Portal Access

New User requesting Partner Portal and Partner Portal Administrative Access

Next Exit Clear

**Figure 4** Portal Access Choose Request Type Page.

From this page, users may choose one of two options.

- New user requesting Partner Portal access.
- New user requesting Partner Portal and Partner Portal Administrative Access.

### 3.1.1 New User Requesting Partner Portal Access

Note: If you also wish to request administrative access, go to [Section 3.1.2 New User Requesting Partner Portal and Partner Portal Administrative Access](#).

1. Check the New user requesting Partner Portal Access radio button.

2. Click **Next**. The Portal Access Request Information panel will be displayed.

**Portal Access Request Information** ?

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

- Requested User ID must be Alphanumeric.
- Requested User ID can not begin with a number.
- Requested User ID must be at least 6 characters in length.
- Requested User ID can not be greater than 20 characters.

**User Information**

First Name\*

Last Name\*

E-Mail Address\*

Confirm E-Mail\*

Requested User ID\*

Work Phone Number\*  Ext.

Role\*

Date Requested

**Security Agreement**

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

Please check the box if you have read and agreed to Wisconsin's User Security Agreement.

Previous Next Exit Clear

**Figure 5** Portal Access Request Information Panel

3. Enter the required information. Note that all fields are required. The Date Requested field defaults to the current date.
4. Read the Security Agreement and check the security agreement checkbox.

- Click **Next**. The Portal Access Additional Information panel will be displayed.

**Figure 6** Portal Access Additional Information Panel

The financial payers associated with the requested role will be checked.

- Select your certifying agency code using the drop-down menu at the top of the panel.
- Click **Next**.
  - If the organization does not have associated Data Support System (DSS) universe access, the Portal Access Secret Questions page will be displayed. Proceed to [step 13](#).
  - If the organization has associated DSS universe access, the Portal Access DSS Universe Request page will be displayed.

**Figure 7** Portal Access DSS Universe Request page

- Select a universe using the drop-down menu in the **Universe** field.

- Click anywhere on the panel. The page will refresh and one or more checkboxes will be displayed that allow you to select the universe control items you wish to request.

**Portal Access Request Information**

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

| Universe Requested | Status |
|--------------------|--------|
| Encounter Datamart |        |

Select row above to update -or- click Add button below.

Universe\* Encounter Datamart

Please select one or more of the Universe Control Items below\*

- WPS Insurance Corporation: 23119999
- Adams Co. HLTH and Human SVCS Dept:
- Bayfield Co. Dept of Human SVCS: 23110041
- Manitowoc Co. Human SVCS Dept: 23110361
- Marathon Co. Dept of Social SVCS: 23110371
- North Central HLTH Care - Marathon Co.: 23113
- Marinette Co. HLTH and Human SVCS Dept:
- Menominee Co. HLTH and Human SVCS Dept:
- Wood Co. Dept of Social SVCS: 23110711
- Wood Co. Unified SVCS: 23110712

Save Cancel

Previous Next Exit Clear

**Figure 8** Universe Control Item Selections

- Check the checkbox for each item you wish to select.
- Click **Save**. The page will refresh and the requested universe will appear at the top of the panel.

**Portal Access DSS Universe Request**

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

| Universe Requested | Status    |
|--------------------|-----------|
| Encounter Datamart | Requested |

Select row above to update -or- click Add button below.

Universe\* [Empty]

Please select one or more of the Universe Control Items below\*

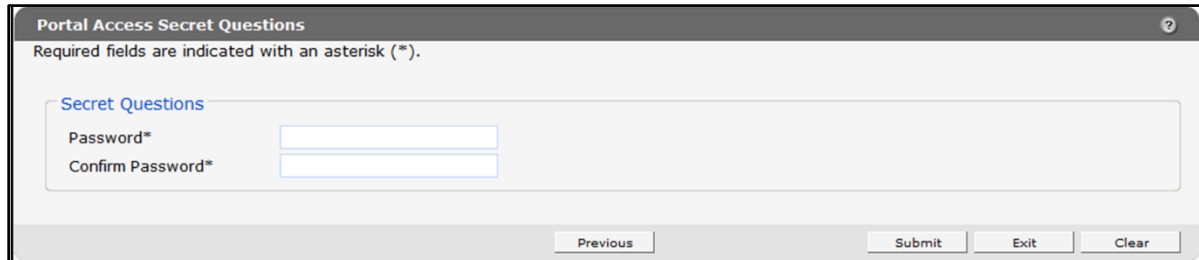
Save Cancel

Previous Next Exit Clear

**Figure 9** Requested Universe Added

Repeat steps 8-11 for each universe you wish to request.

12. After adding all the desired universes, click **Next**. The Portal Access Secret Questions page will be displayed.



**Figure 10** Portal Access Secret Questions Page

13. Create a password that you will use to log on to the Portal according to the guidelines in [Section 2.1 ForwardHealth General Password Guidelines](#). Retype the password to confirm it is correct.
14. Click **Submit**.

If the submission is successful, the following message will be displayed.

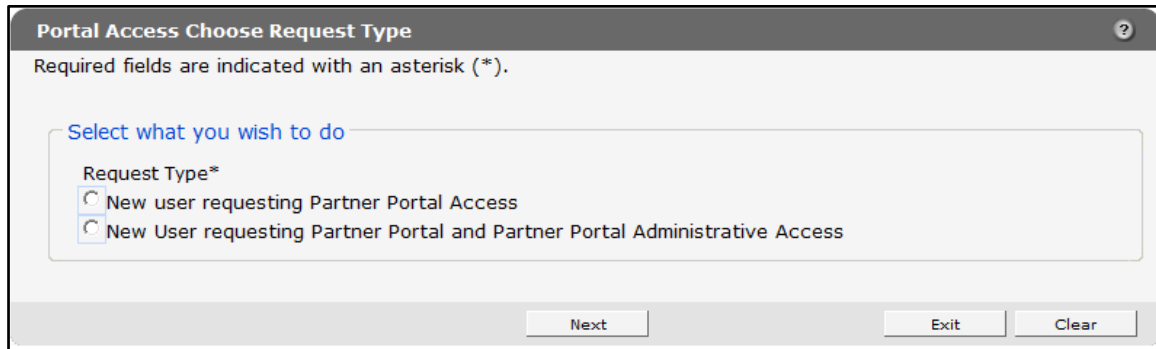


**Figure 11** Submission Confirmation

If there was a problem with the submission, an error message will be displayed indicating what corrections need to be made.

### 3.1.2 New User Requesting Partner Portal and Partner Portal Administrative Access

1. On the public Partner homepage, scroll down to the “Accessing the Secure Partner Site” section.
2. Click **Request Secure Partner Site**. The Portal Access Choose Request Type page will be displayed.



Portal Access Choose Request Type

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

Select what you wish to do

Request Type\*

New user requesting Partner Portal Access

New User requesting Partner Portal and Partner Portal Administrative Access

Next Exit Clear

**Figure 12** Portal Access Choose Request Type Page

3. Check the New user requesting Partner Portal and Partner Portal Administrative Access checkbox.
4. Click **Next**.

The Portal Access Request Information page will be displayed.

**Portal Access Request Information**

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

- Requested User ID must be Alphanumeric.
- Requested User ID can not begin with a number.
- Requested User ID must be at least 6 characters in length.
- Requested User ID can not be greater than 20 characters.

**User Information**

First Name\*

Last Name\*

E-Mail Address\*

Confirm E-Mail\*

Requested User ID\*

Work Phone Number\*  Ext.

Role\*

Date Requested

**Security Agreement**

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

Please check the box if you have read and agreed to Wisconsin's User Security Agreement.

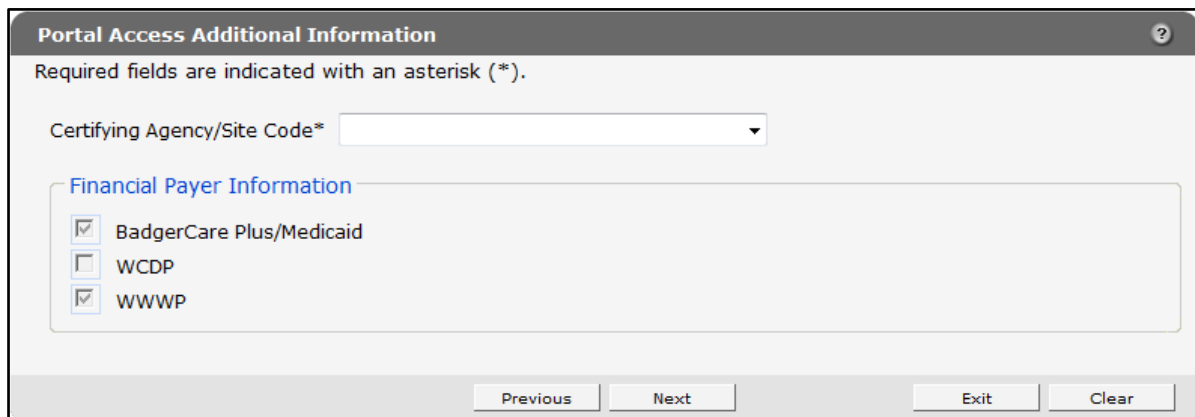
Previous Next Exit Clear

**Figure 13** Portal Access Request Information Page

5. Enter the required information. Note that all fields are required. The Date Requested field defaults to the current date.



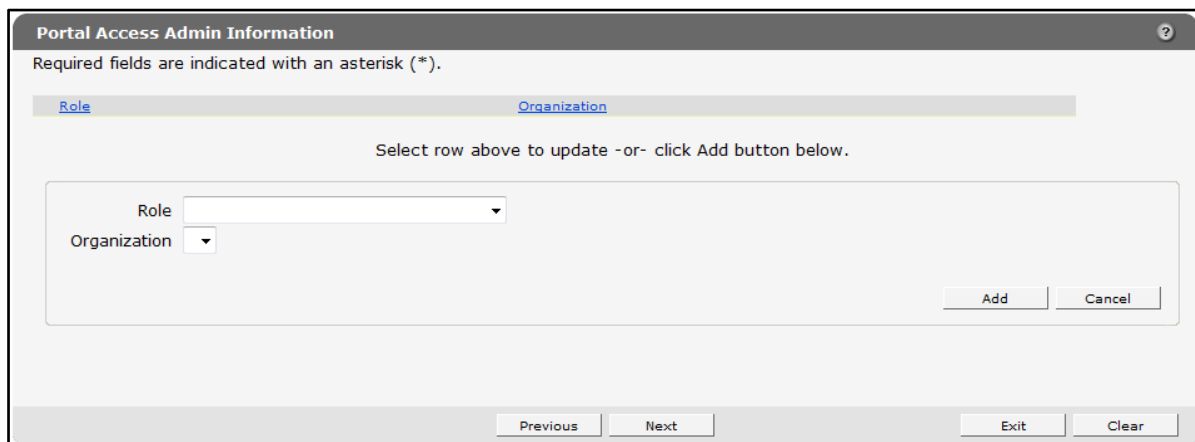
6. Read the Security Agreement and check the security agreement checkbox.
7. Click **Next**. The Portal Access Additional Information panel will be displayed.



**Figure 14** Portal Access Additional Information Panel

The financial payers associated with the requested role will be checked.

8. Select your certifying agency code using the drop-down menu at the top of the panel.
9. Click **Next**. The Portal Access Admin Information page will be displayed.



**Figure 15** Portal Access Admin Information Page

10. Select a role using the drop-down menu in the Role field. The page will refresh and the Organization drop-down field will populate with the organizations related to the selected role.
11. Select an organization using the drop-down menu in the Organization field.

12. Click **Add**. The selected role and organization will be added to the top of the panel.

**Portal Access Admin Information** ?

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

| Role                           | Organization            |
|--------------------------------|-------------------------|
| County IM Worker - Coordinator | 001-00-Adams County DSS |

Select row above to update -or- click Add button below.

Role

Organization

**Figure 16** Portal Access Admin Information Page — Added Role and Organization

Repeat steps 10-12 above to add additional roles if desired.

If you wish to change any information for a role, click the role you wish to revise.

**Portal Access Admin Information** ?

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

| Role                           | Organization            |
|--------------------------------|-------------------------|
| County IM Worker - Coordinator | 001-00-Adams County DSS |

Select row above to update -or- click Add button below.

Role

Organization

**Figure 17** Portal Access Admin Information Page — Selecting a Role to Change or Delete

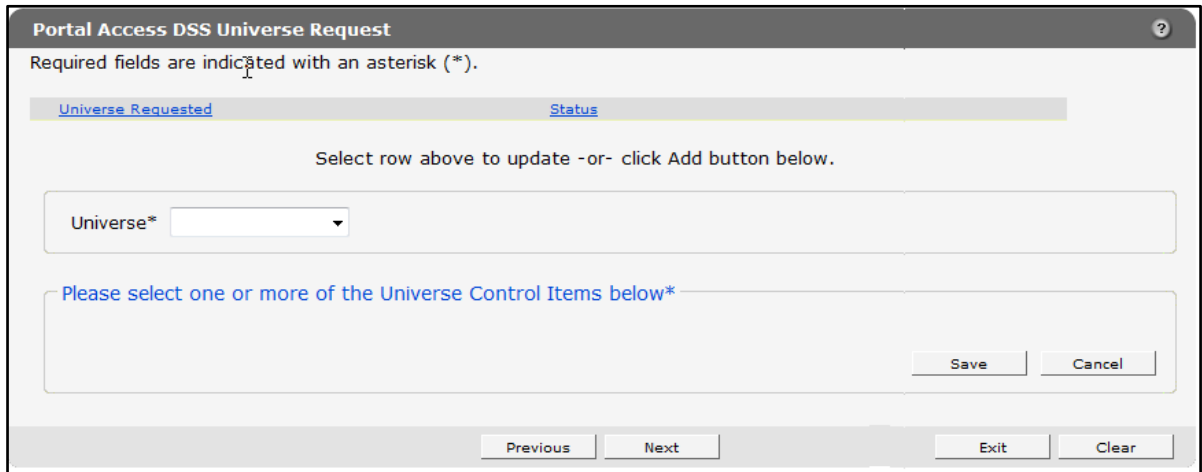
The panel will populate with the selected role. Use the drop-down menus to make any revisions and click **Save** to save the changes.

You can delete a role by selecting the role and clicking **Delete**.

13. Click **Next** to continue applying for access.

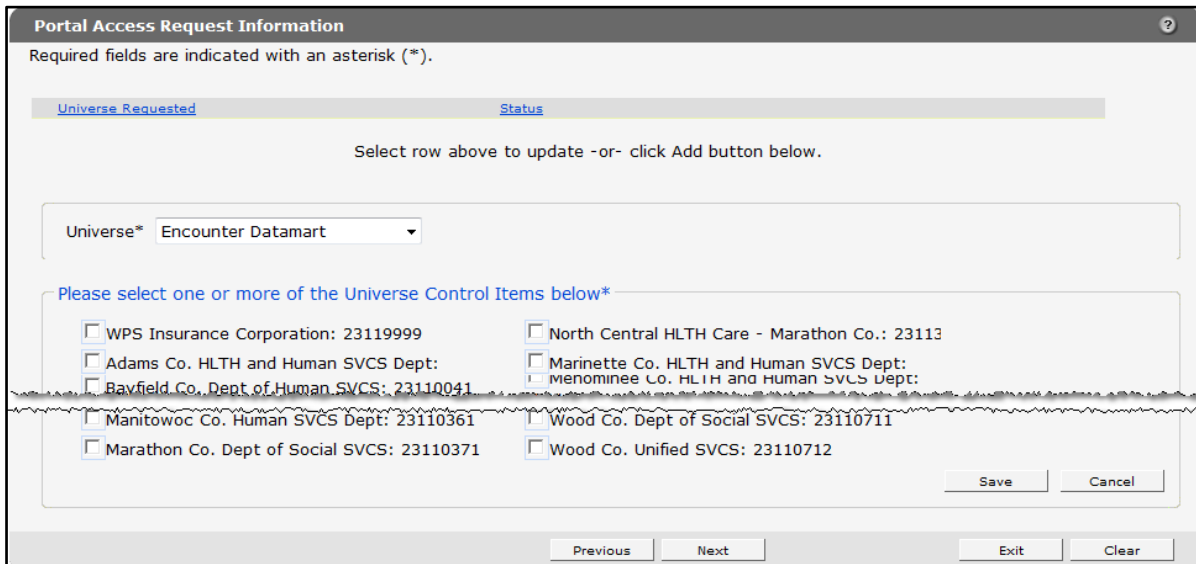
- If the organization does not have associated DSS universe access, the Portal Access Secret Questions page will be displayed. Proceed to [step 19](#).

- If the organization has associated DSS universe access, the Portal Access DSS Universe Request page will be displayed.



**Figure 18** Portal Access DSS Universe Request Page

14. Select a universe using the drop-down menu in the Universe field.
15. Click anywhere on the panel. The page will refresh and one or more checkboxes will allow you to select the universe control items you wish to request.



**Figure 19** Portal Access Request Information Page — Universe Control Item Selections

16. Check the checkbox for each item you wish to select.

- Click **Save**. The page will refresh and the requested universe will appear at the top of the panel.

**Figure 20** Portal Access DSS Universe Request —Universe Added

Repeat steps 14-17 for each universe you will to request.

- After adding all the universes you wish to request, click **Next**. The Portal Access Secret Questions page will be displayed.

**Figure 21** Portal Access Secret Questions Page

- Create a password that you will use to log on to the Portal according to the guidelines in [Section 2.1 ForwardHealth General Password Guidelines](#). Retype the password to confirm it is correct.
- Click **Submit**. If the submission is successful, the following message will be displayed.

**Figure 22** Submission Confirmation

If there was a problem with the submission, an error message will be displayed indicating what corrections need to be made.

# 4 Logging in for First Time

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 homepage at <https://www.forwardhealth.wi.gov/>. The Portal homepage will be displayed.

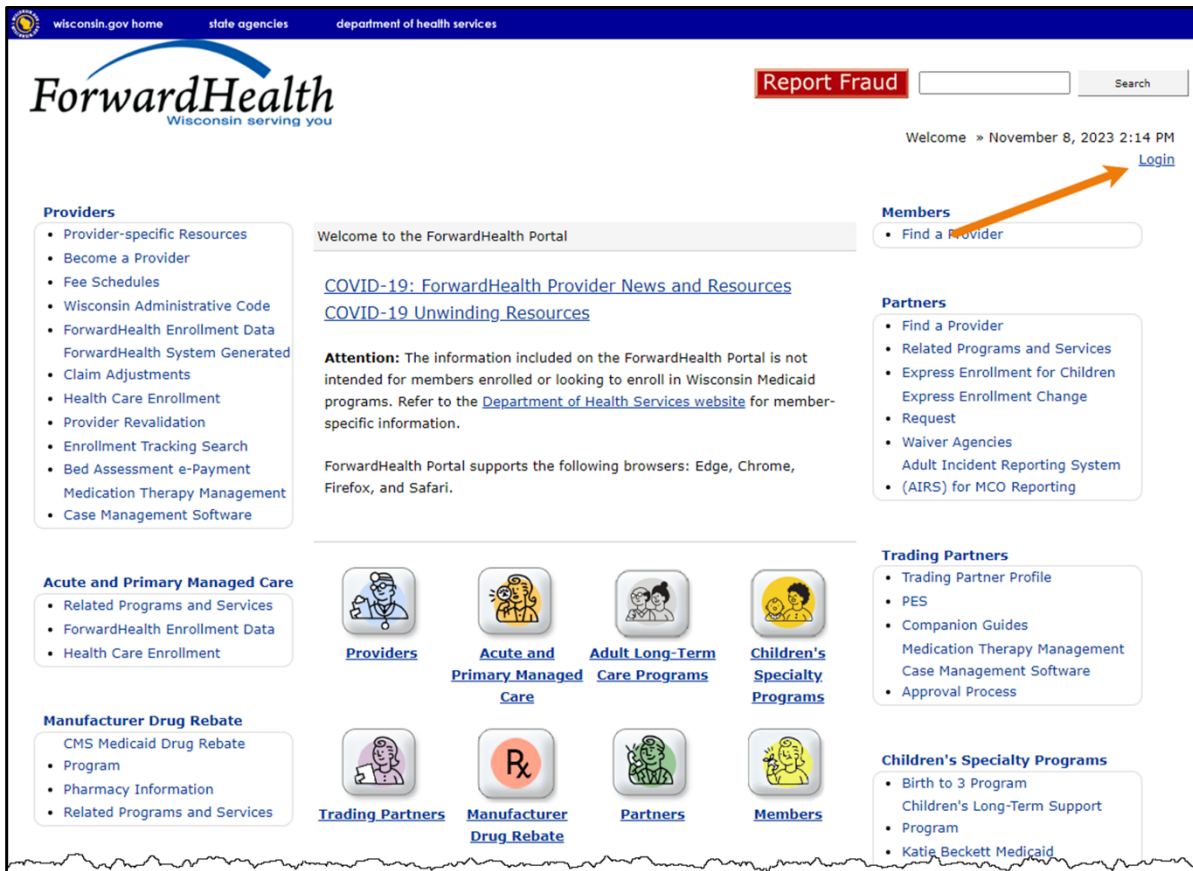
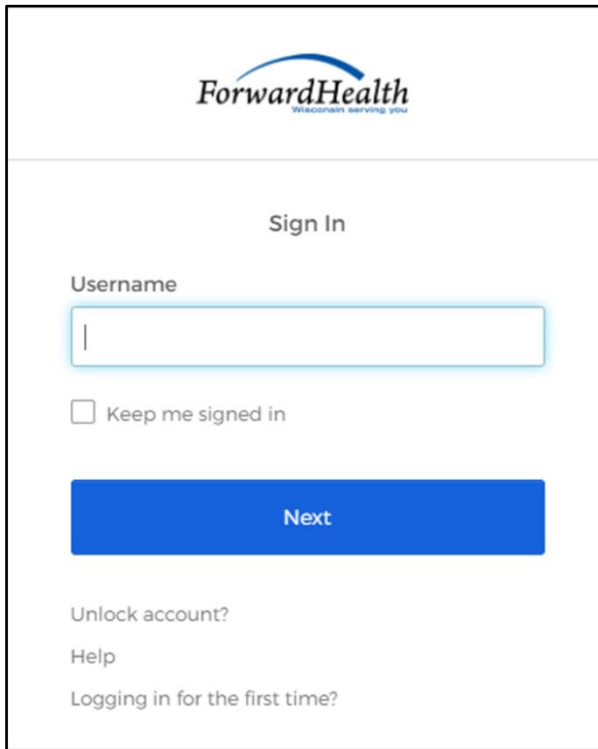


Figure 23 ForwardHealth Portal Homepage

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



ForwardHealth  
WISCONSIN SERVING YOU

Sign In

Username

Keep me signed in

Next

[Unlock account?](#)

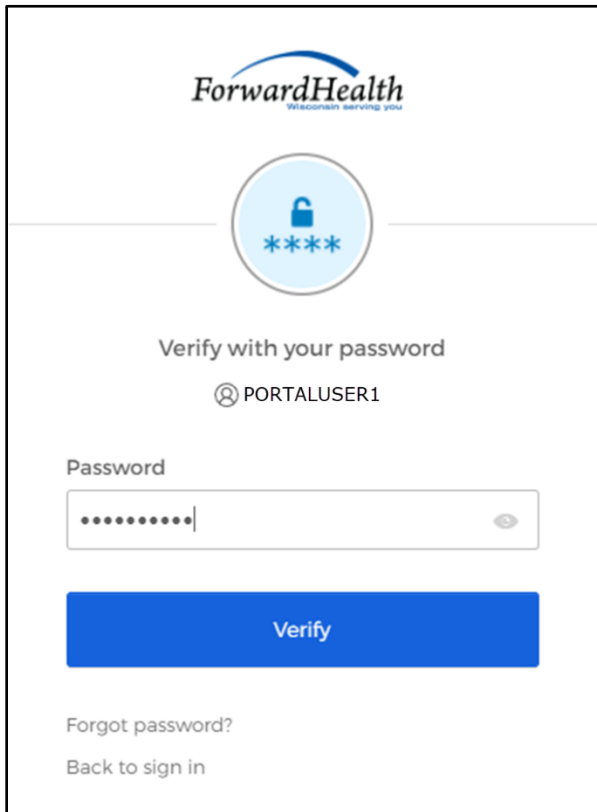
[Help](#)

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

**Figure 24** 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?](#)

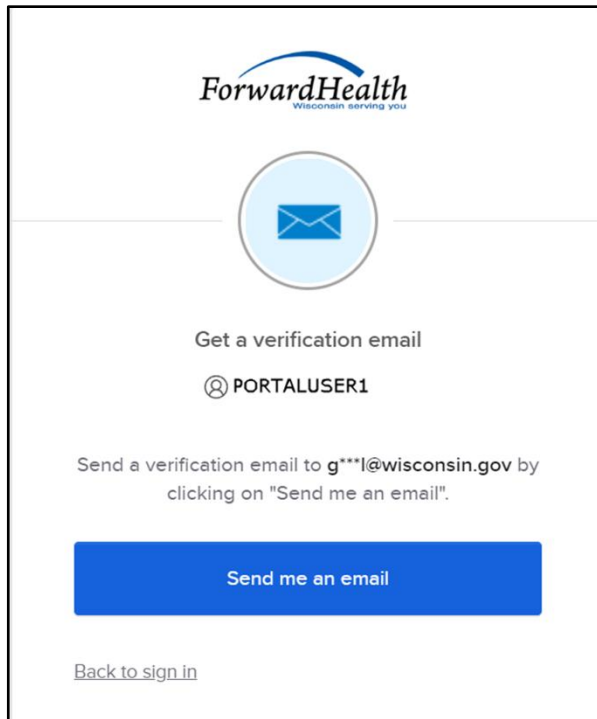
[Back to sign in](#)

**Figure 25** Verify With Your Password Box

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



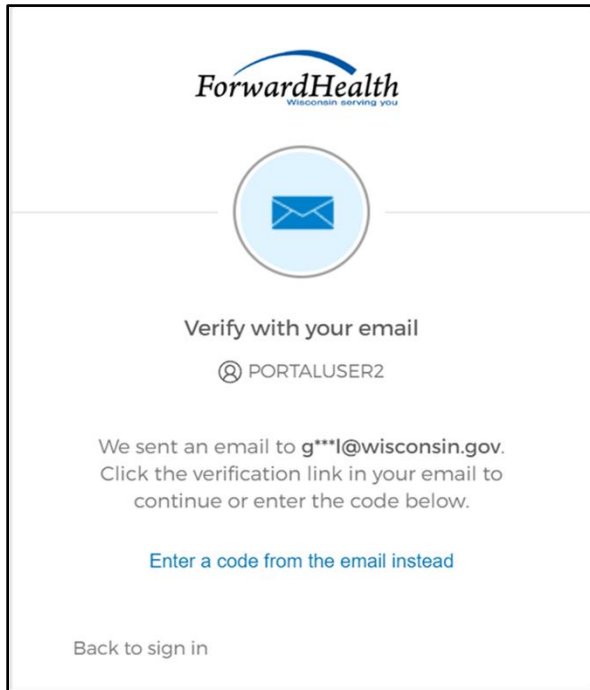
A Get a verification email box will be displayed. Note: If the user's password expires when setting up MFA, a change password box will be displayed, and the user will be prompted to enter and re-enter their new password.



**Figure 26** 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 27** 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).

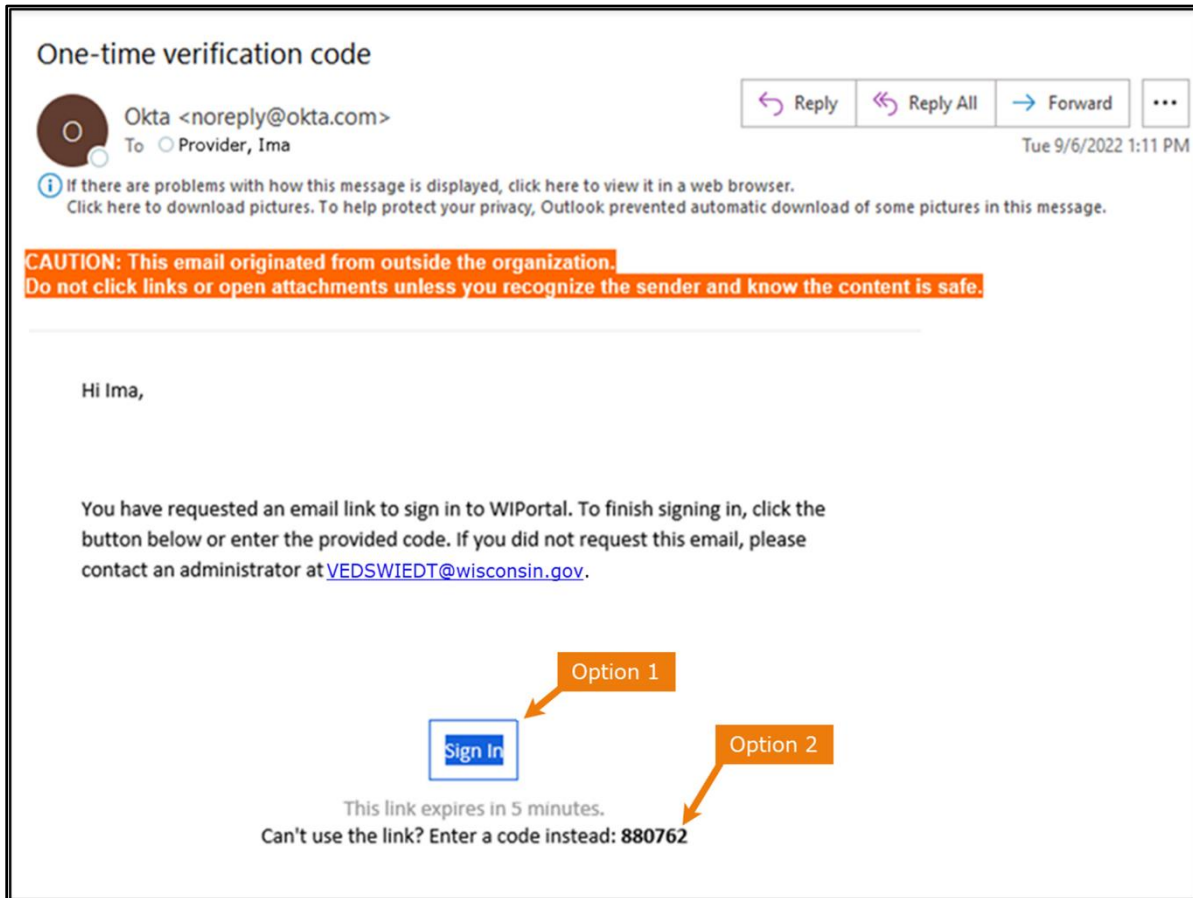
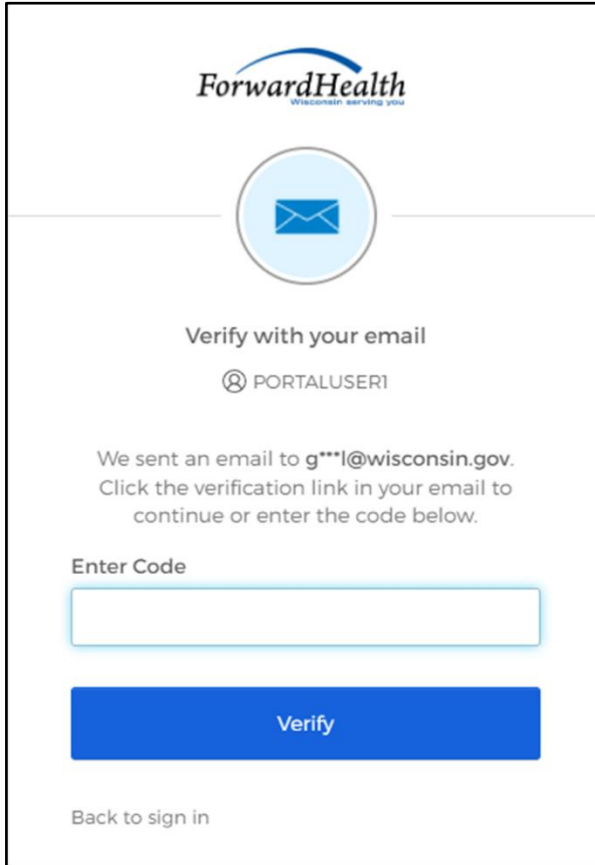


Figure 28 One-Time Verification Code Email

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.

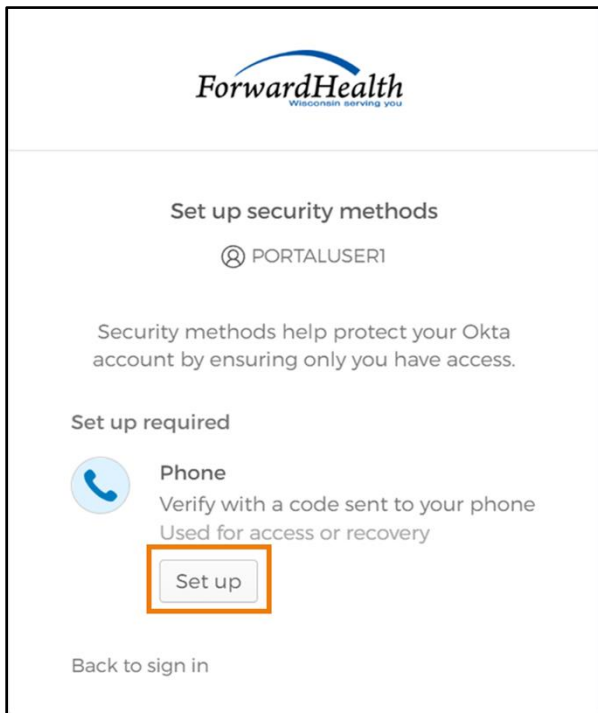
Enter Code

Verify

[Back to sign in](#)

**Figure 29** Verify With Your Email Box

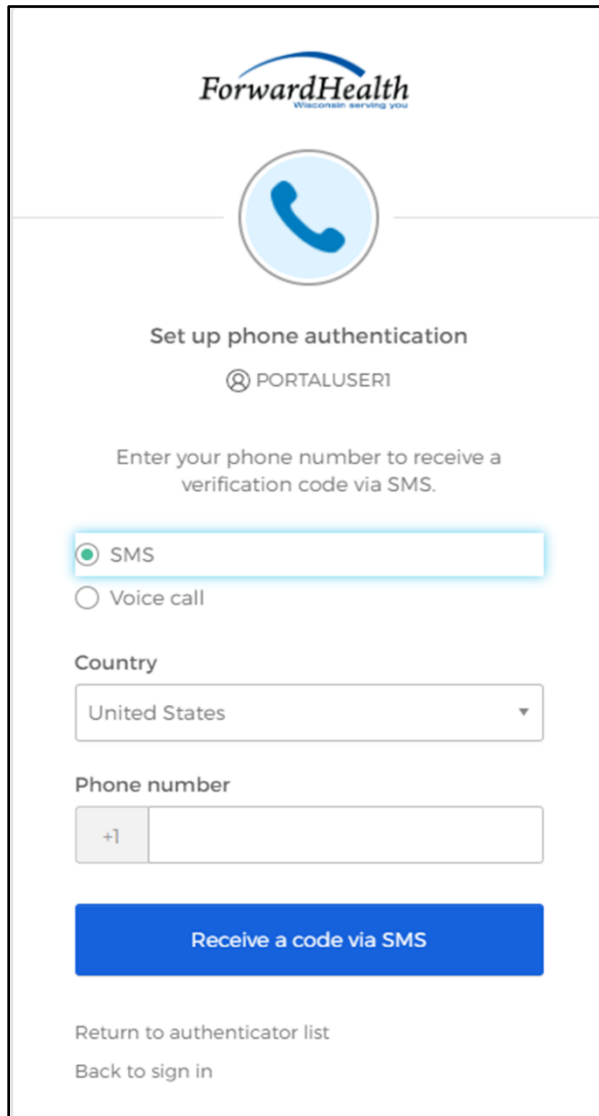
A Set up security methods box will be displayed.



**Figure 30** Set Up Security Methods Box

10. Click **Set up**.

A Set up phone authentication box will be displayed.

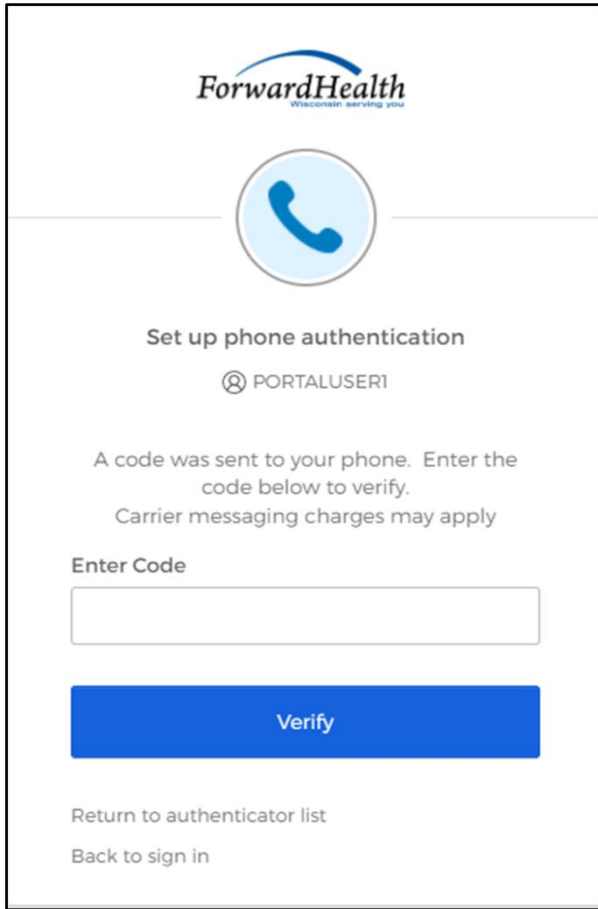


The screenshot shows a web form for setting up phone authentication. At the top is the ForwardHealth logo with the tagline 'Wisconsin, serving you'. Below the logo is a blue telephone handset icon inside a circle. The main heading is 'Set up phone authentication' followed by the user ID 'PORTALUSER1'. 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'. The 'Phone number' field has 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, there are two links: 'Return to authenticator list' and 'Back to sign in'.


**Figure 31** 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](#)

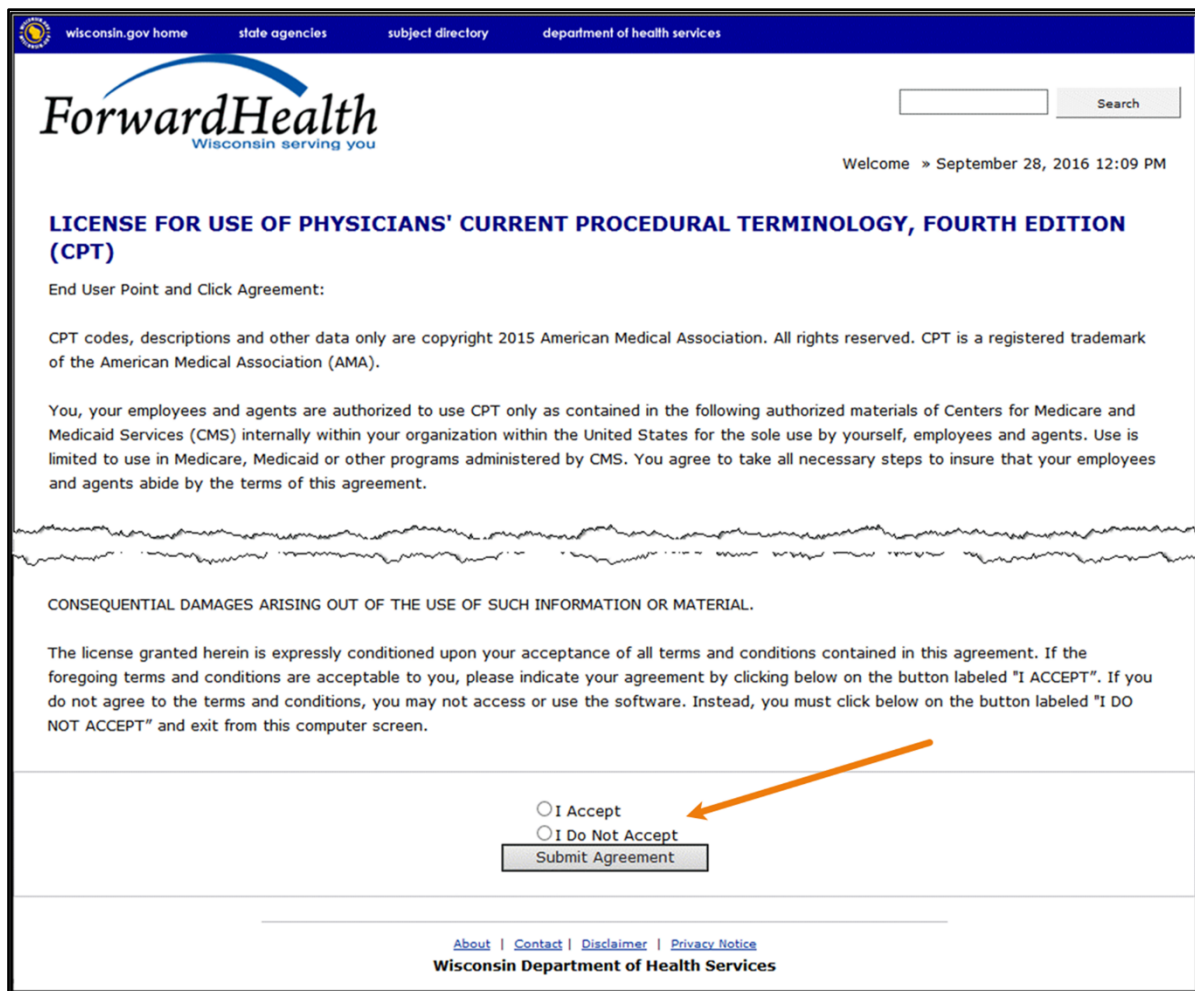
[Back to sign in](#)

**Figure 32** 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**.

If you have not already accepted 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, the license agreements page will be displayed.

Note: If you have previously accepted the license agreements, this page will not be displayed. Proceed to [step 17](#).



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

**ForwardHealth**  
Wisconsin serving you

Welcome » September 28, 2016 12:09 PM

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

End User Point and Click Agreement:

CPT codes, descriptions and other data only are copyright 2015 American Medical Association. All rights reserved. CPT is a registered trademark of the American Medical Association (AMA).

You, your employees and agents are authorized to use CPT only as contained in the following authorized materials of Centers for Medicare and Medicaid Services (CMS) internally within your organization within the United States for the sole use by yourself, employees and agents. Use is limited to use in Medicare, Medicaid or other programs administered by CMS. You agree to take all necessary steps to insure that your employees and agents abide by the terms of this agreement.

CONSEQUENTIAL DAMAGES ARISING OUT OF THE USE OF SUCH INFORMATION OR MATERIAL.

The license granted herein is expressly conditioned upon your acceptance of all terms and conditions contained in this agreement. If the foregoing terms and conditions are acceptable to you, please indicate your agreement by clicking below on the button labeled "I ACCEPT". If you do not agree to the terms and conditions, you may not access or use the software. Instead, you must click below on the button labeled "I DO NOT ACCEPT" and exit from this computer screen.

I Accept  
 I Do Not Accept  
Submit Agreement

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

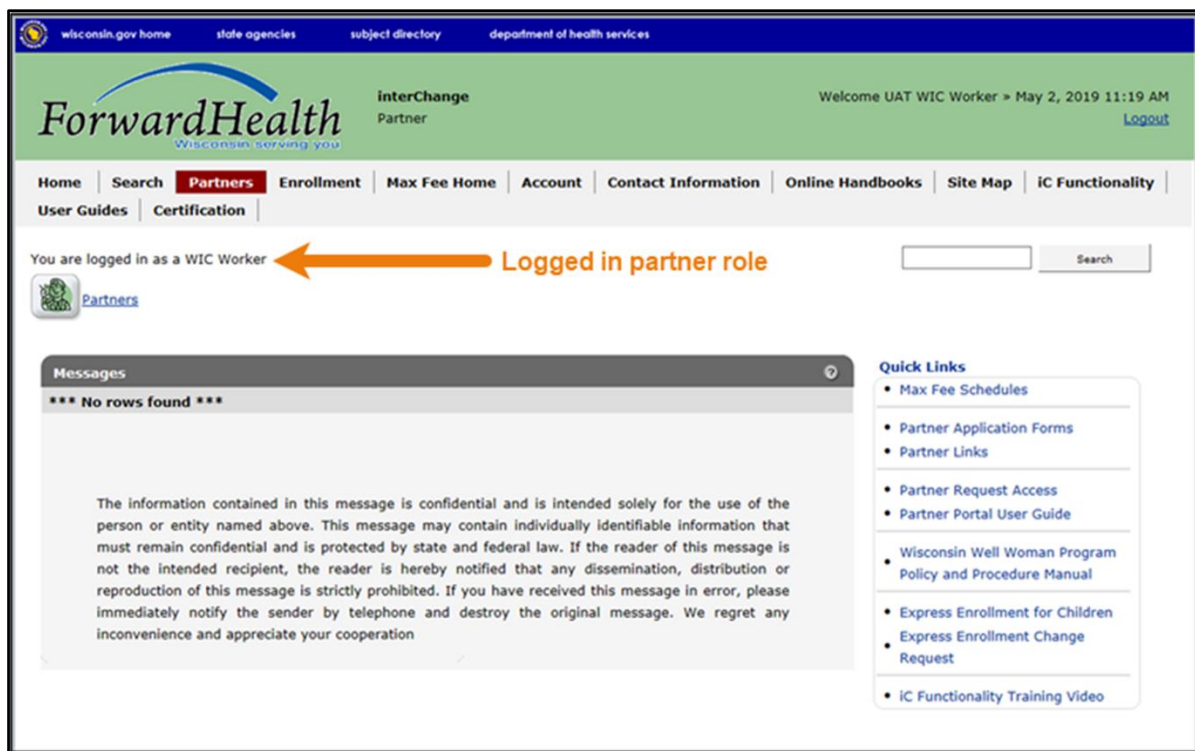
**Figure 33** End User Point and Click License Agreements

16. Click the radio button next to "I Accept." Click **Submit Agreement**.

Note: If "I Do Not Accept" is selected, you will be returned to the Portal homepage and will not be able to access the secure Partner Portal.



17. The secure Partner homepage will be displayed.

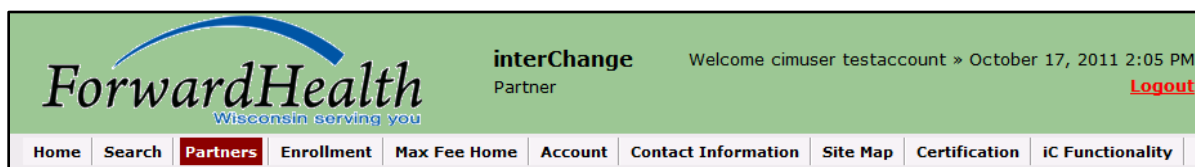


**Figure 34** ForwardHealth Secure Partner Homepage

Note: Your secure homepage may display differently, depending on the partner role used to log in.

## 4.1 ForwardHealth Partner Homepage

### 4.1.1 Main Menu Button



**Figure 35** Main Menu Buttons

Based on the partner role with which you are logged in, the secure Partner Portal main menu may consist of some or all of the following menu buttons displayed at the top of the page:

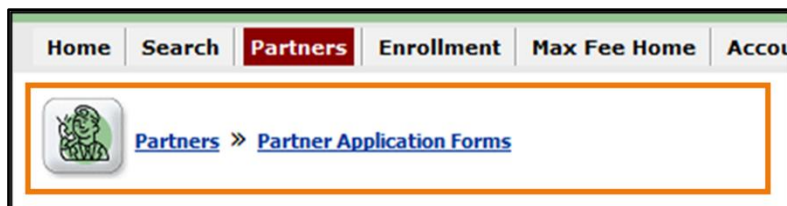
- *Home* — Displays the Portal homepage.
- *Search* — Allows users to search for information within the Portal.
- *Partners* — Links to your secure Portal homepage.

- *Enrollment* — Allows users to search for a member’s summary enrollment data. Users should refer to the Enrollment Verification User Guide for additional information.
- *Max Fee Home* — Links to the maximum allowable fee schedules.
- *Claims* — Contains links to the WWWP Reporting Form Search and other user guides.
- *Account* — Allows users to update the information associated with their username and password. Users can set up, update, and maintain account login credentials and read and manage account messages, such as email.
- *Contact Information* — Contains Portal Help Desk contact information and allows users to submit questions about the Portal.
- *Site Map* — Contains shortcut links to the main topics in the Partner area of the Portal.
- *iC Functionality* — Allows users to access detailed information from interChange. Users should refer to their interChange Functionality User Guide for additional information.

A red highlighted button indicates the current area of the Portal being displayed.

## 4.1.2 Navigation Map

Many Portal pages include a navigation map consisting of a series of links to previously viewed pages. The navigation map is displayed next to the Portal icon.



**Figure 36** Portal Navigation Map

In the panel above, the links track the path taken to reach the current page. Click any of the displayed links to return to the specific page. For more information on Portal Navigation, see [Section 5.5 Portal Navigation](#).

*Important:* The browser’s Back button *cannot* be used to navigate back within the Portal. The main menu buttons at the top of the page, the quick links on the secure homepage, and the links in the navigation map can be used to return to previously viewed pages.

## 4.1.3 Quick Links

The Quick Links menu contains links to the following general information:

- *Online Handbooks* — Directs the user to the Online Handbook, which allows providers access to all policy and billing information for Wisconsin Medicaid, BadgerCare Plus, SeniorCare, WWWP, and WCDP in a centralized location.

- *ForwardHealth Updates* — Directs the user to the ForwardHealth Publications page. The first source of provider information, *Updates* announce the latest information on policy and coverage changes, PA submission requirements, claim submission requirements, and training.
- *Electronic Data Interchange* — Directs the user to the ForwardHealth Companion Guides, which provide useful technical information about standards for nationally recognized electronic transactions.
- *Max Fee Schedules* — Opens a window that details maximum allowable fee schedule information and provides Quick Links pertaining to fee schedules.
- *Partner Application Forms* — Links to forms that can be completed online or printed and completed manually.
- *Partner Links* — Links to county sites and other programs and information.
- *Partner Request Access* — Allows partner users to request portal access. Refer to Section 3.1 [Requesting Secure Partner Site Access](#) for additional information.
- *Wisconsin Well Woman Program Policy and Procedure Manual* — Opens a Web page with links to documents that explain the WWWP policy and procedures.

The Quick Links menu may also contain links to other areas of the Portal that are available to the specific partner role under which the user is logged in. User guides and instruction sheets are available for many of these areas.

## 4.2 Requesting Secure Portal Administrative Access

Current users logged into the secure area of the partner Portal may request administrative access from the secure partner homepage.

1. On the secure partner homepage, click **Partner Request Access** in the Quick Links menu.

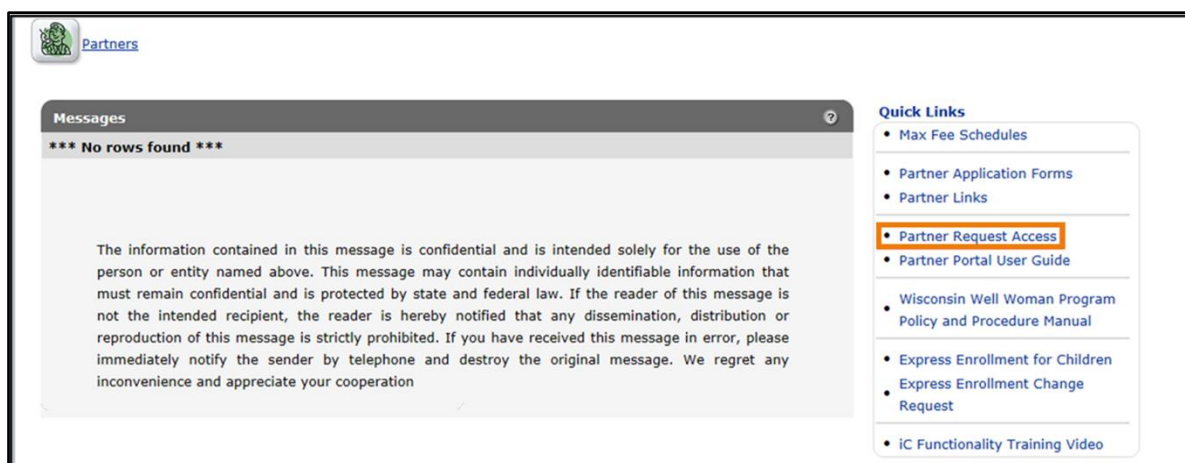
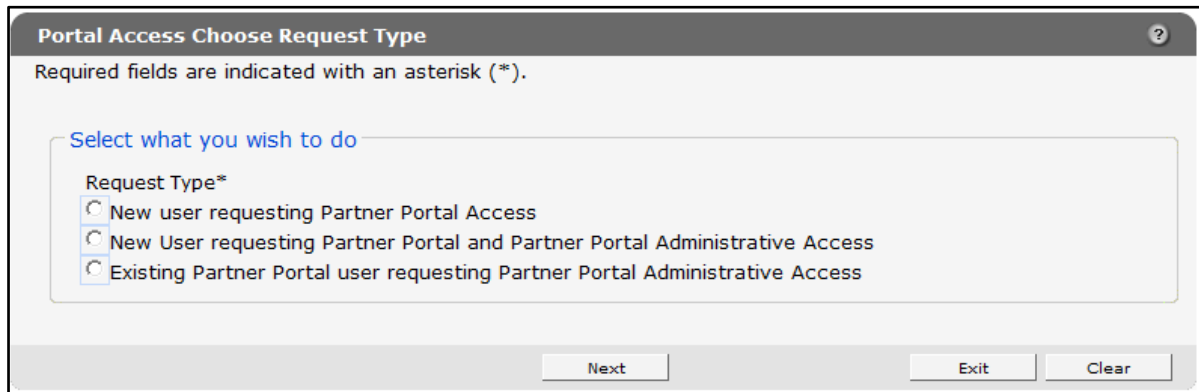


Figure 37 Partner Request Access Link

The Portal Access Choose Request Type page is displayed.



Portal Access Choose Request Type

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

Select what you wish to do

Request Type\*

New user requesting Partner Portal Access

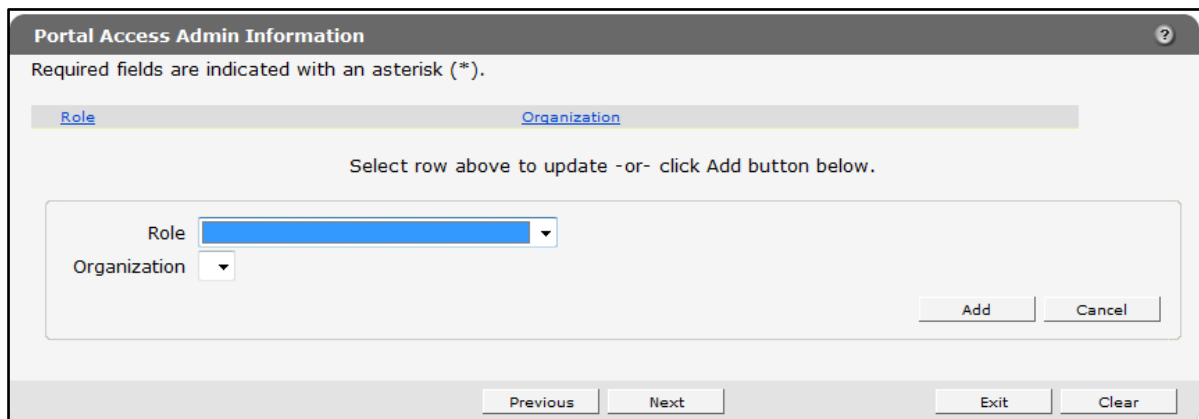
New User requesting Partner Portal and Partner Portal Administrative Access

Existing Partner Portal user requesting Partner Portal Administrative Access

Next Exit Clear

**Figure 38** Portal Access Choose Request Type Page

2. Check the checkbox labeled **Existing Partner Portal** user requesting Partner Portal Administrative Access.
3. Click **Next**. The Portal Access Admin Information page will be displayed.



Portal Access Admin Information

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

Role Organization

Select row above to update -or- click Add button below.

Role

Organization

Add Cancel

Previous Next Exit Clear

**Figure 39** Portal Access Admin Information Page

4. Use the drop-down menu in the **Role** field to select a role.

5. Use the drop-down menu in the **Organization** field to select an organization.
6. Click **Add**. The selected role and organization will be added to the top of the panel.

**Portal Access Admin Information**

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

| Role                           | Organization            |
|--------------------------------|-------------------------|
| County IM Worker - Coordinator | 001-00-Adams County DSS |

Select row above to update -or- click Add button below.

Role

Organization

Add Cancel

Previous Next Exit Clear

**Figure 40** Portal Access Admin Information Page — Added Role and Organization

Repeat steps 4-6 above to add additional roles if desired.

If you wish to change any information for a role, click the role you wish to revise.

**Portal Access Admin Information**

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

| Role                           | Organization            |
|--------------------------------|-------------------------|
| County IM Worker - Coordinator | 001-00-Adams County DSS |

Select row above to update -or- click Add button below.

Role County IM Worker - Coordinator

Organization 001-00-Adams County DSS

Delete Save Add Cancel

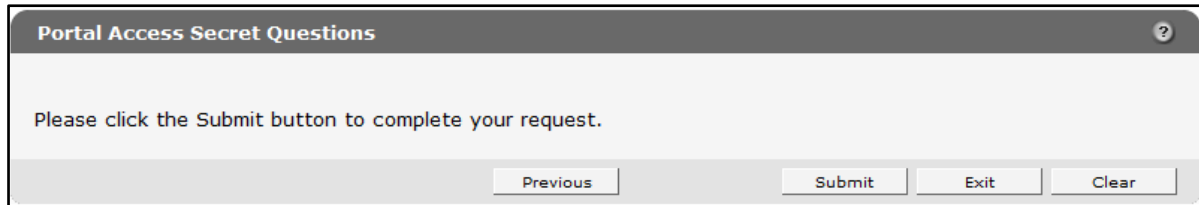
Previous Next Exit Clear

**Figure 41** Portal Access Admin Information Page — Selecting a Role to Change or Delete

The panel will populate with the selected role. Use the drop-down menus to make any revisions and click **Save**.

You can delete a role by selecting the role and clicking **Delete**.

- Click **Next** to continue applying for access. The Portal Access Secret Questions page will be displayed.



Portal Access Secret Questions

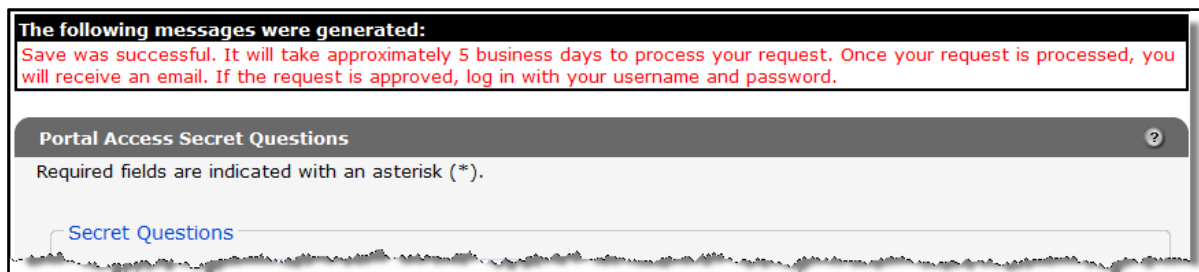
Please click the Submit button to complete your request.

Previous Submit Exit Clear

**Figure 42** Portal Access Secret Questions Page

- Click **Submit**.

If the submission is successful, the following message will be displayed.



The following messages were generated:  
Save was successful. It will take approximately 5 business days to process your request. Once your request is processed, you will receive an email. If the request is approved, log in with your username and password.

Portal Access Secret Questions

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

Secret Questions

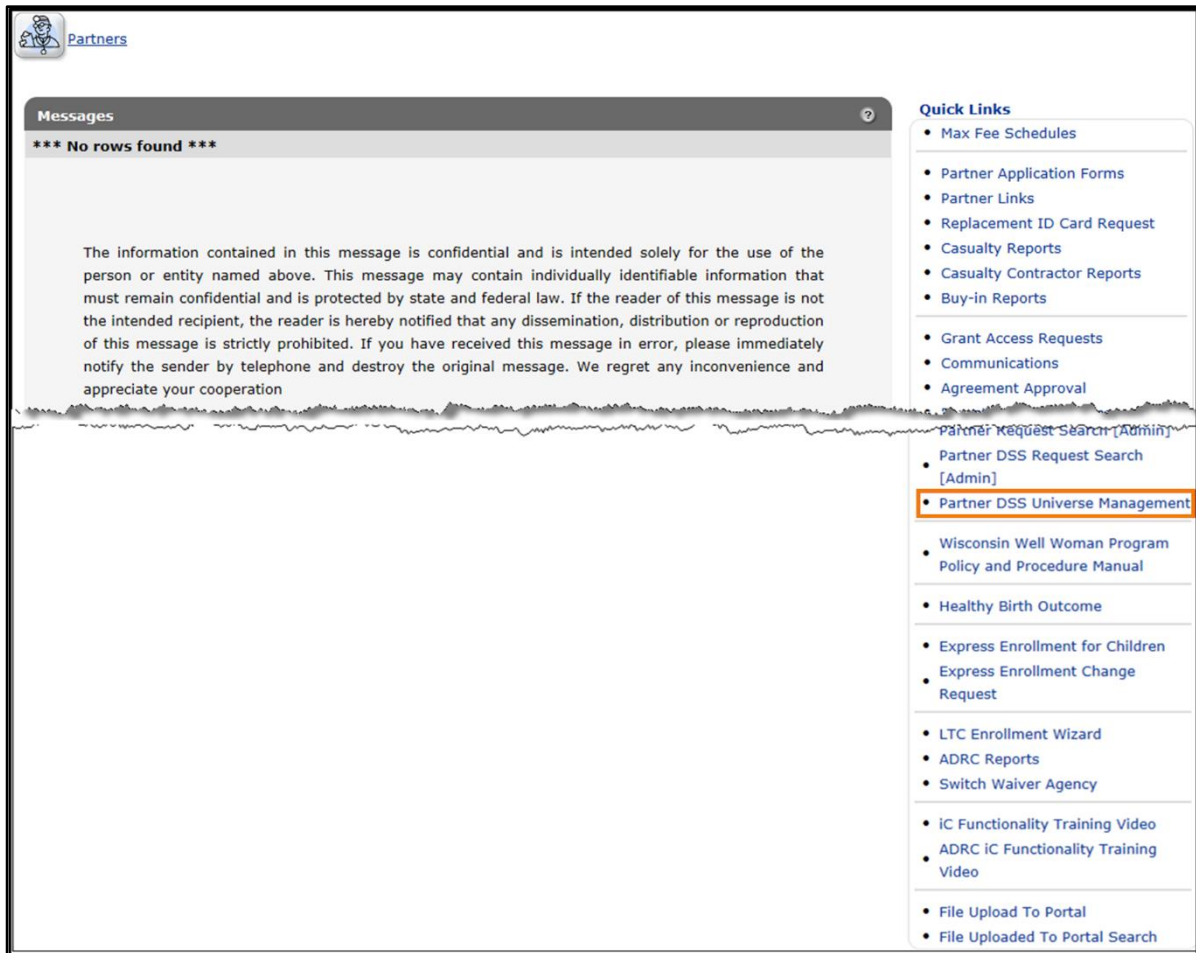
**Figure 43** Submission Confirmation

If there was a problem with the submission, an error message will be displayed indicating what corrections need to be made.

## 4.3 Requesting DSS Universe Access

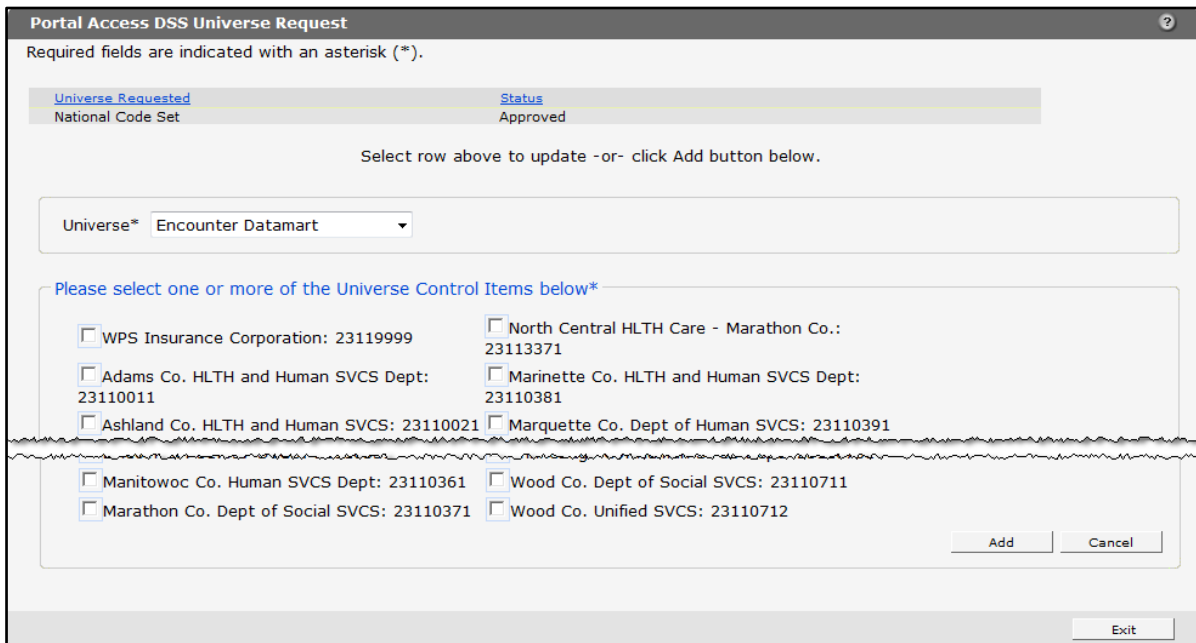
If your organization has associated DSS universe access there will be a link for Partner DSS Universe Management in the Quick Links menu.

1. Click **Partner DSS Universe Management**.



**Figure 44** Partner DSS Universe Management Link

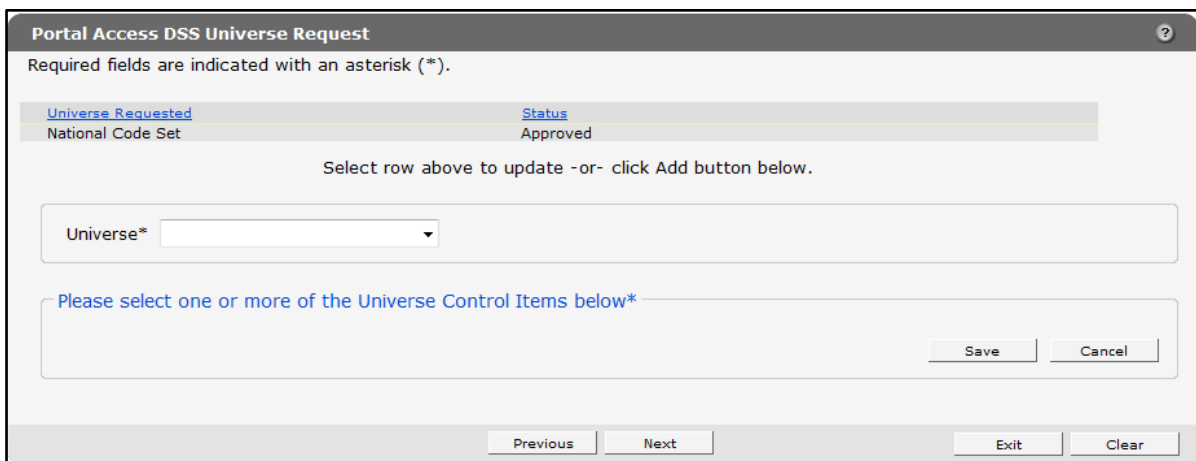
The Portal Access Request Information page will be displayed.



**Figure 45** Portal Access DSS Universe Request Page

Logged-in users can use this page to request access to DSS universes. The top of the panel lists any universes already requested or approved, along with the status of the request. The drop-down menu in the Universe field will display the universes applicable to the user’s role and organization.

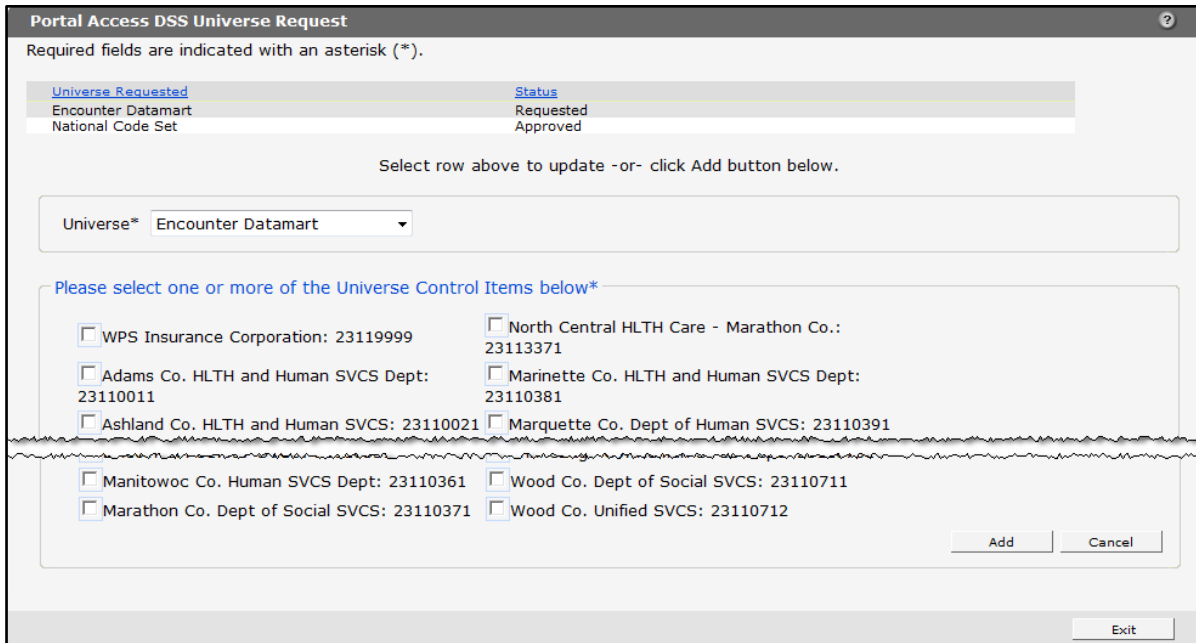
2. Select a universe using the drop-down menu in the **Universe** field.
3. Click anywhere on the panel. The page will refresh and one or more checkboxes will allow you to select the universe control items you wish to request.



**Figure 46** Portal Access DSS Universe Request Page — Universe Control Items



4. Place a check in the checkboxes for the items you wish to access.
5. Click **Add**. The page will refresh and the selected universe will be added to the list.



**Figure 47** Portal Access DSS Universe Request Page — Universe Added to List

Repeat steps 2-6 for each universe you wish to request.

You will be notified by email when a decision is issued on your request.

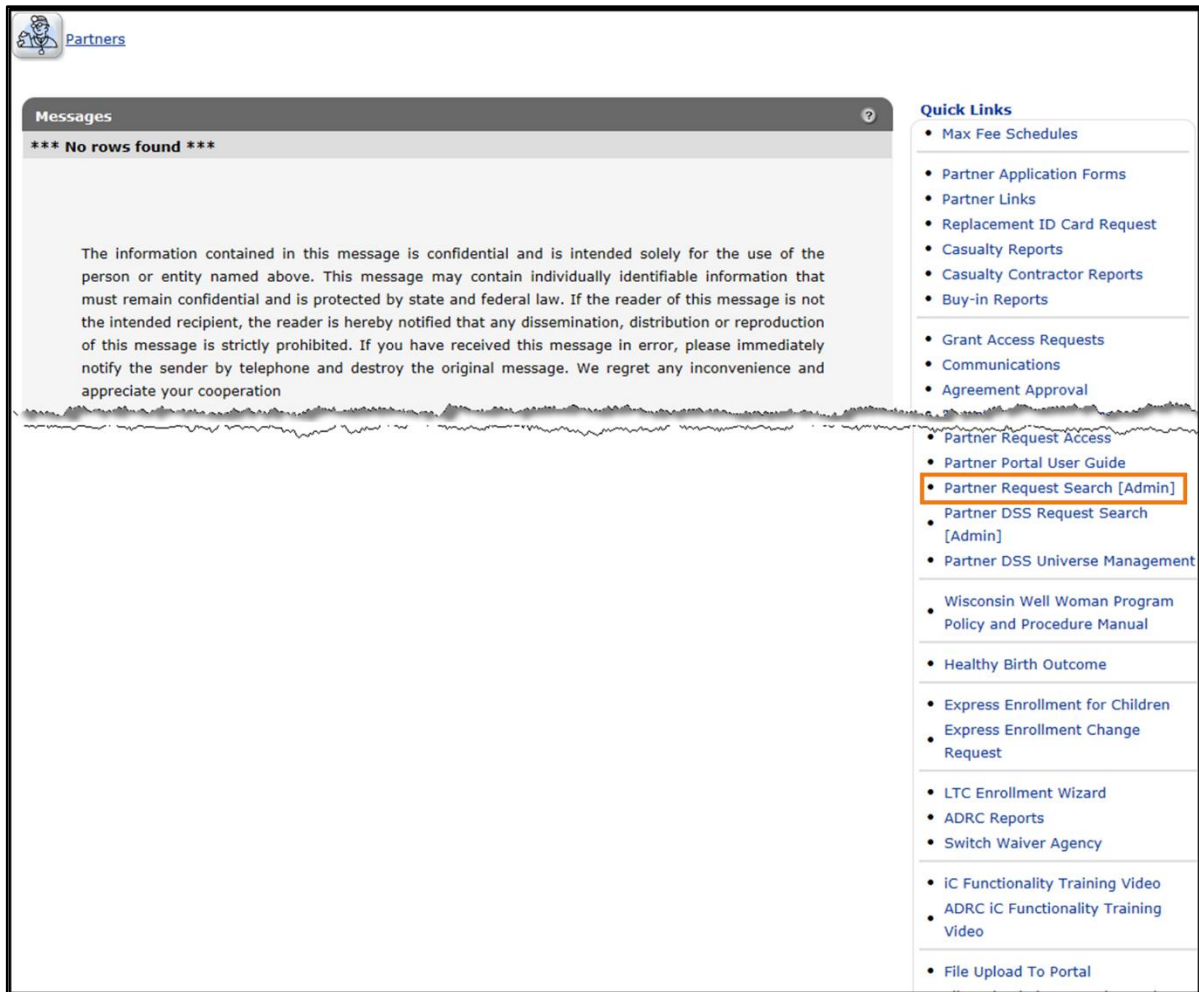
6. Click **Exit** to return to the secure Partner homepage.

## 4.4 Partner Request Search [Admin]

Users with Portal administrative access may administer Partner requests using the Partner Request Search function on the secure partner site homepage.

To search for a partner request:

1. On the secure Partner homepage, click **Partner Request Search [Admin]** in the Quick Links menu.



**Figure 48** Partner Request Search [Admin] Link

The Portal Access User Request Search page will be displayed.

The screenshot shows the 'Portal Access User Request Search' page. At the top, it says 'Required fields are indicated with an asterisk (\*)'. Below this are several search fields: 'Role' (a dropdown menu), 'Last Name' (a text input field), 'First Name' (a text input field), 'From Date of Request' (a date input field), 'To Date of Request' (a date input field), and 'Status' (a dropdown menu). At the bottom right, there are 'Search' and 'Clear' buttons.

**Figure 49** Portal Access User Request Search Page

Portal administrators can search using any of the search fields. If a date is used as one of the search criteria, both dates must be entered.

2. Enter your search criteria and click **Search**. The Portal Access User Request Search Results panel will be displayed.

Portal Access User Request Search

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

Role:  From Date of Request:   
 Last Name: PARTNER To Date of Request:   
 First Name:  Status: Requested

**Search Results**

| First Name | Last Name    | Requested User ID | Role                          | Date Requested | Status    | Status Date |
|------------|--------------|-------------------|-------------------------------|----------------|-----------|-------------|
| I M        | PARTNER      | IMPART            | County IM Workers             | 20111011       | Requested | 20111011    |
| IM         | PARTNERADMIN | PARTADMIN         | Division of Quality Assurance | 20121119       | Requested | 20121119    |
| IM         | PARTNERADMIN | PARTADMIN         | County IM Workers             | 20121119       | Requested | 20121119    |

Figure 50 Portal Access User Request Search Results Panel

3. Click the user whose profile you wish to view. The Request User Profile page for the user will be displayed.

Request User Profile

**User Information**

First Name: I M Requested User ID: IMPART  
 Last Name: PARTNER Date Requested: 10/11/2011  
 E-Mail: impartner@partner.com Status: Requested  
 Work Phone Number: (608)555-5555 Ext. 5555 Status Date: 10/11/2011  
 Role: County IM Workers  
 Certifying Agency/Site Code: 000-00-Default Certifying Agency

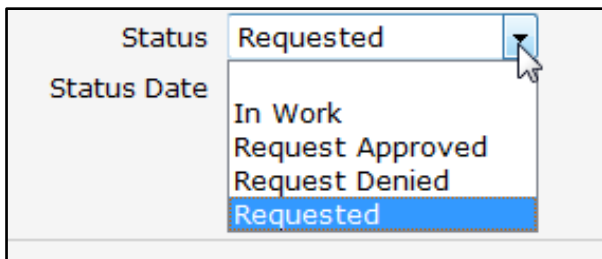
Figure 51 Request User Profile Page

This page allows Portal administrators to view and manage Portal access requests.

### 4.4.1 Approving or Denying Access Requests

An email will be sent nightly to all local administrators if there are one or more pending requests for their role/organization. If a request is placed in an “In Work” status, it will not be included in the email.

1. Click the Status drop-down menu to approve or deny the request or indicate that it is still being worked on.

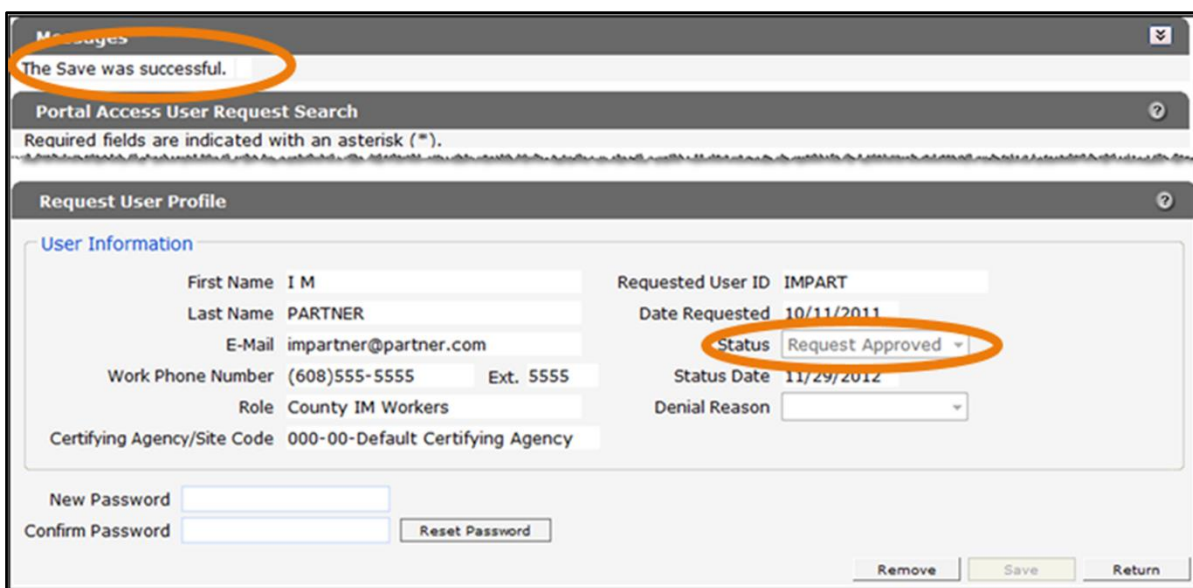


**Figure 52** Approve or Deny Request

Note: If you select “Request Denied” you will also need to select a reason for the denial in the Denial Reason drop-down field that will display. This will determine the language for the email sent to the Requestor to notify them of the denial.

2. Click **Save**.

The status field will show the selected status grayed out and a “Save was successful” message will be displayed at the top of the page. If there is a problem with the save, an error message will be displayed here.



**Figure 53** Successful Save

The Remove button can be used to delete a request.

The Return button will close the user profile panel and return you to the search results panel.

## 4.4.2 Resetting User Passwords

Once a user’s access request has been approved, administrators may change the user’s password on the Request User Profile page.

To reset a user’s password:

1. Search for the user’s access request using the above procedures to access the Request User Profile page.

The screenshot shows a web form titled "Request User Profile". It contains several input fields for user details: First Name (IM), Last Name (PARTNERADMIN), E-Mail (partadmin@isp.org), Work Phone Number ((608)555-5555), and Role (Division of Quality Assurance). On the right side, there are fields for Requested User ID (PARTADMIN), Date Requested (11/19/2012), Status (Request Approved), Status Date (11/29/2012), and Denial Reason. At the bottom, there are two password input fields labeled "New Password" and "Confirm Password", along with a "Reset Password" button. Navigation buttons "Remove", "Save", and "Return" are located at the bottom right.

Figure 54 Request User Profile Page

The Reset Password fields will be displayed at the bottom of the page.

2. Enter the new password in the **New Password** field.
3. Enter the new password again in the **Confirm Password** field.
4. Click **Save**.

A confirmation message will be displayed at the top of the page. If there is a problem with the password reset, an error message will be displayed here. The Admin will need to inform the user of the temporary password.



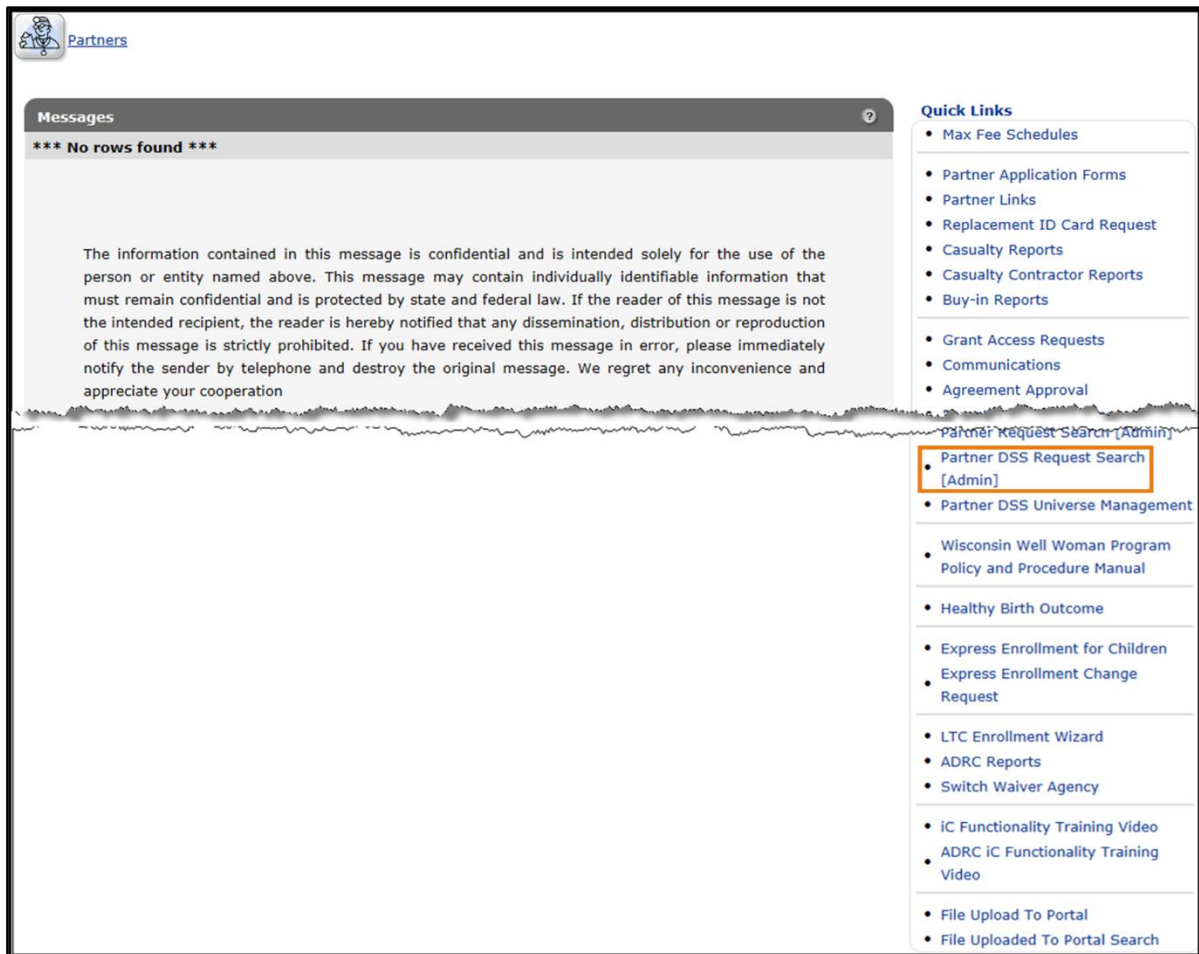
Figure 55 Password Reset Confirmation Message

## 4.5 Partner DSS Request Search [Admin]

Users with Portal administrative access may administer partner DSS requests using the Partner DSS Request Search function on the secure partner site homepage.

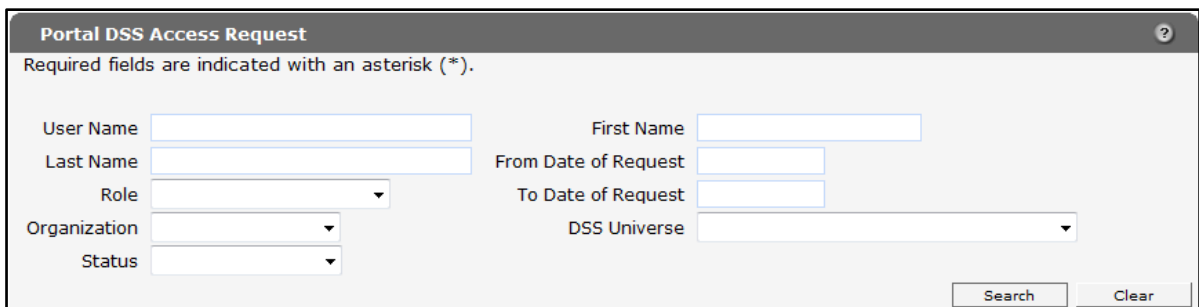
To search for a partner’s DSS request:

1. On the secure partner homepage, click **Partner DSS Request Search [Admin]** in the Quick Links menu.



**Figure 56** Partner DSS Request Search [Admin] Link

The Portal DSS Access Request Search page will be displayed.



**Figure 57** Portal DSS Access Request Search Page

Portal administrators can search using any of the search fields. If a date is used as one of the search criteria, both dates must be entered.

2. Enter your search criteria and click **Search**. The Portal DSS Access Request Search Results page will be displayed.

| User Name  | First Name | Last Name | Role             | Organization     | Universe          | Status    |
|------------|------------|-----------|------------------|------------------|-------------------|-----------|
| IMAPARTNER | IMA        | PARTNER   | Child LTS Waiver | Child LTS Waiver | National Code Set | Requested |

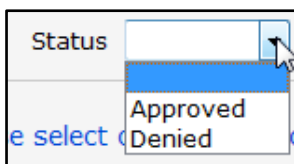
**Figure 58** Portal DSS Access Request Search Results Panel

3. Click the user whose profile you wish to view. The Request User Profile page for the user will be displayed.

**Figure 59** Request User Profile Page

This page allows Portal administrators users to view and manage Portal DSS access requests.

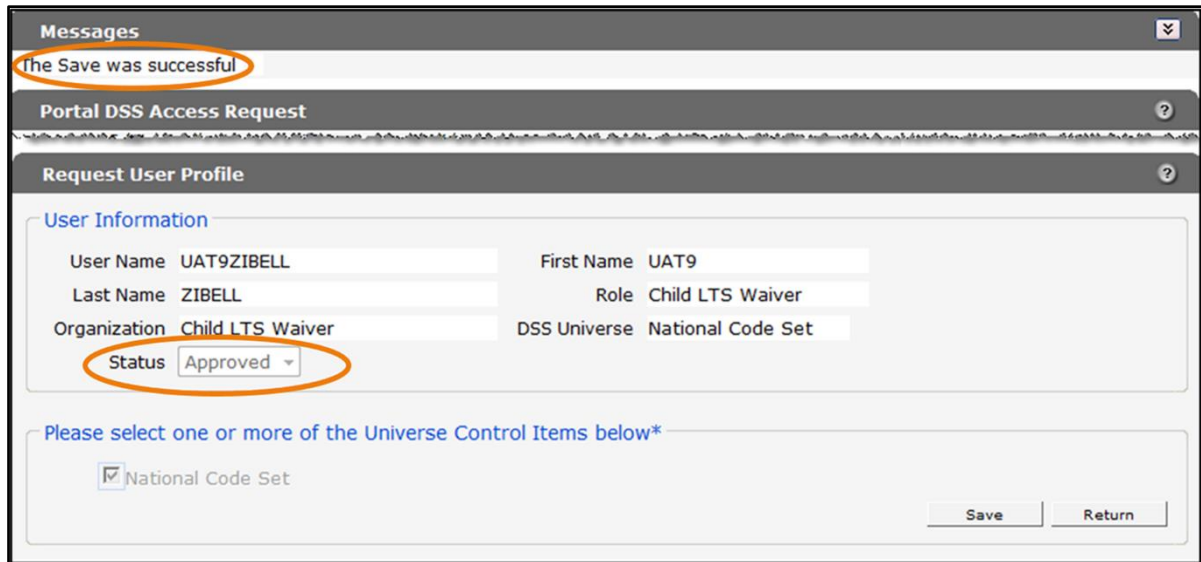
4. Click the Status drop-down menu to approve or deny the request.



**Figure 60** Approve or Deny Request

5. Click **Save**.

The status field will show the selected status grayed out and a “Save was successful” message will be displayed at the top of the page.



The screenshot displays a web interface for a 'Request User Profile'. At the top, a 'Messages' section shows a notification: 'The Save was successful'. Below this is a 'Portal DSS Access Request' section. The main area is titled 'Request User Profile' and contains a 'User Information' section with the following fields: 'User Name' (UAT9ZIBELL), 'First Name' (UAT9), 'Last Name' (ZIBELL), 'Role' (Child LTS Waiver), 'Organization' (Child LTS Waiver), and 'DSS Universe' (National Code Set). The 'Status' field is a dropdown menu currently set to 'Approved'. Below the user information, there is a section titled 'Please select one or more of the Universe Control Items below\*' with a checkbox for 'National Code Set' which is checked. At the bottom right, there are 'Save' and 'Return' buttons.

**Figure 61** Request User Profile — Successful Save

A confirmation email will be sent to the user when the request is granted by DSS. Users will not have access to the Business Objects Web reporting tool until permission is granted by DSS.

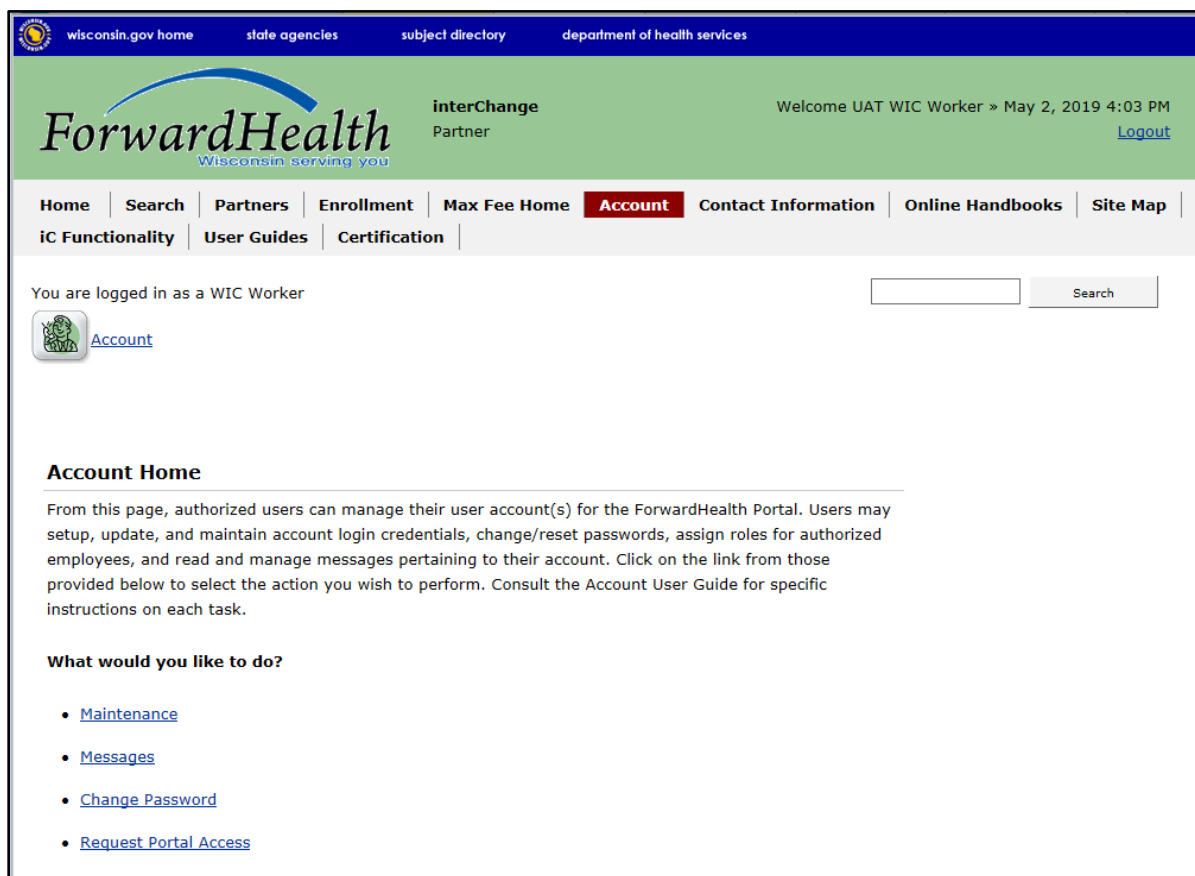
The Return button will close the user profile page and return you to the search results page.



# 5 General Portal Information

## 5.1 Account Maintenance

1. From the main menu tabs displayed across the top of the page, click **Account**. The Account homepage will be displayed.



**Figure 62** Account Homepage

The Account homepage contains links that allow you to update your login credentials, contact information and security questions, view and manage messages, and change your login password.

- To update your login credentials or contact information, 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 63** 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 64** Account Maintenance Panel – Verify User Account

5. 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 (\*).

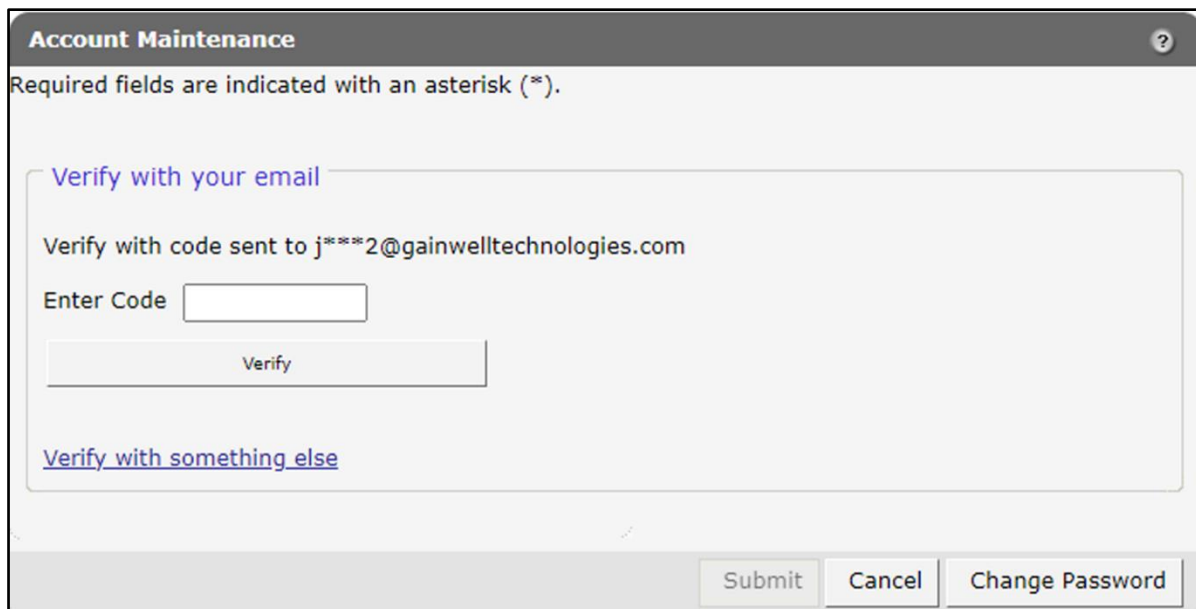
[Verify with your email](#)

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

[Verify with something else](#)

**Figure 65** Account Maintenance Panel – Email or Text Message Verification

6. 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.
7. 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 66** Account Maintenance Panel – Enter Code

8. Click **Verify**.

A confirmation message will be displayed at the top of the page. If there is a problem with the information entered, an error message will be displayed here.



Figure 67 Confirmation Message

## 5.2 Changing Passwords

Users can change their login password using either the Change Password button on the Account Maintenance panel or the link on the Account homepage.

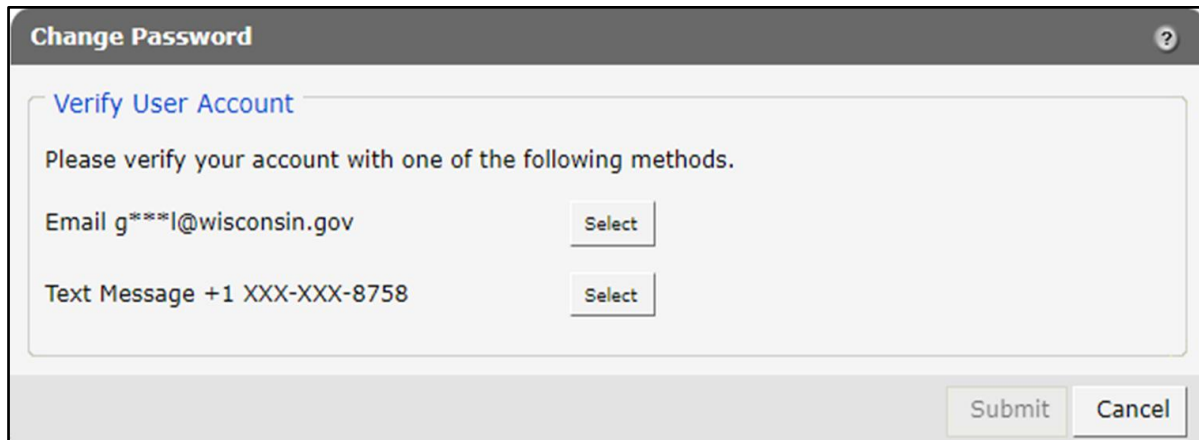
1. Click Change Password. The Change Password page will be displayed.



Figure 68 Change Password Page

2. Enter your current password in the **Current Password** field.
3. Enter your new password in the New Password field according to the guidelines in [Section 2.1 ForwardHealth General Password Guidelines](#).
4. Enter your new password again in the Confirm New Password field.
5. Click **Submit**.

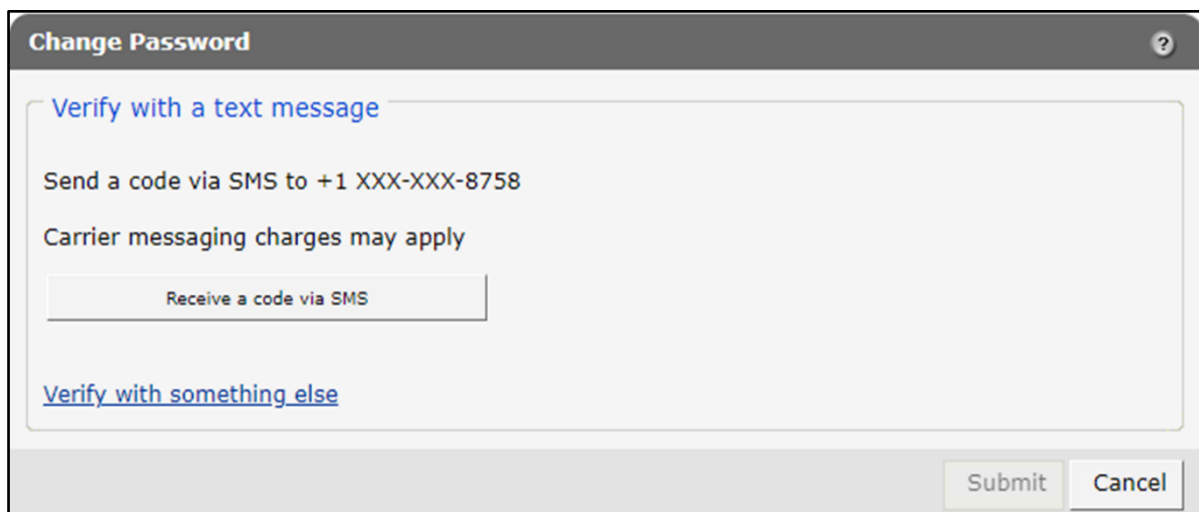
A Change Password verification panel will be displayed.



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. Below the title is a blue link 'Verify User Account'. The main text reads 'Please verify your account with one of the following methods.' There are two rows of options: 'Email g\*\*\*\*l@wisconsin.gov' and 'Text Message +1 XXX-XXX-8758', each with a 'Select' button to its right. At the bottom right, there are 'Submit' and 'Cancel' buttons.

**Figure 69** Change Password Panel – Verify User Account

6. 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.

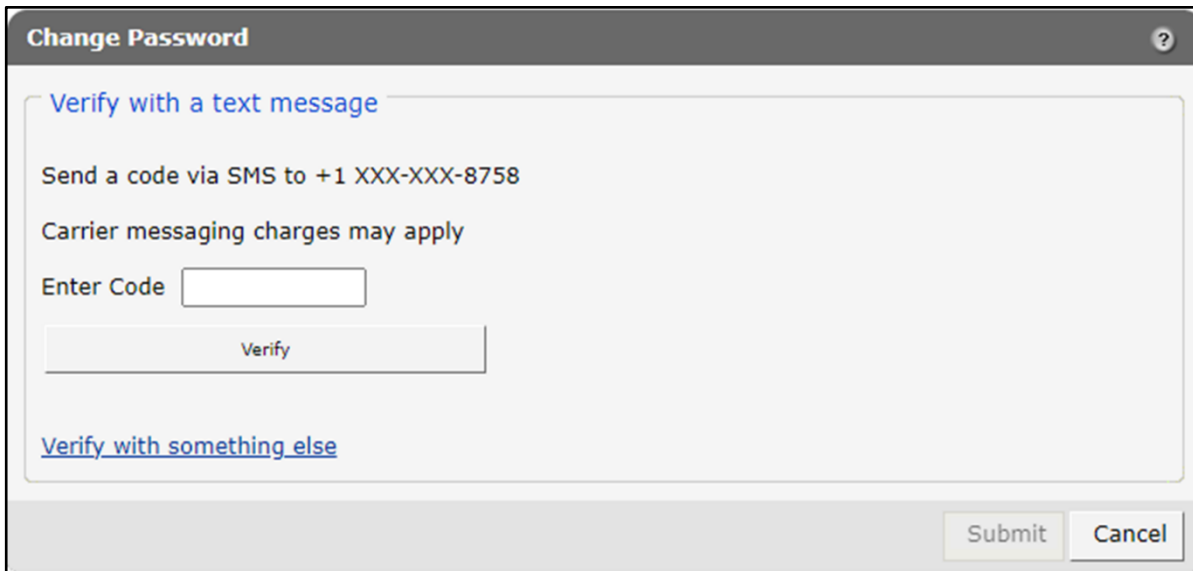


The screenshot shows a 'Change Password' dialog box with a dark header and a light body. The title 'Change Password' is in the top left, and a help icon (?) is in the top right. Below the title is a blue link 'Verify with a text message'. The main text reads 'Send a code via SMS to +1 XXX-XXX-8758' and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

**Figure 70** Change Password Panel – Email or Text Message Verification

7. 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.

8. Enter the code in the Change Password verification panel.



**Change Password**

[Verify with a text message](#)

Send a code via SMS to +1 XXX-XXX-8758

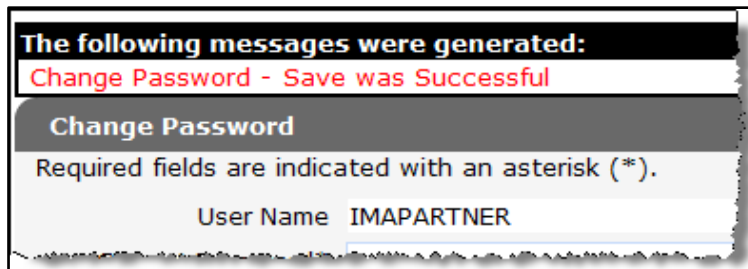
Carrier messaging charges may apply

Enter Code

[Verify with something else](#)

**Figure 71** Change Password Panel – Enter Code

9. Click **Verify**. A confirmation message will be displayed at the top of the page. If there is a problem with the password entered, an error message will be displayed here.



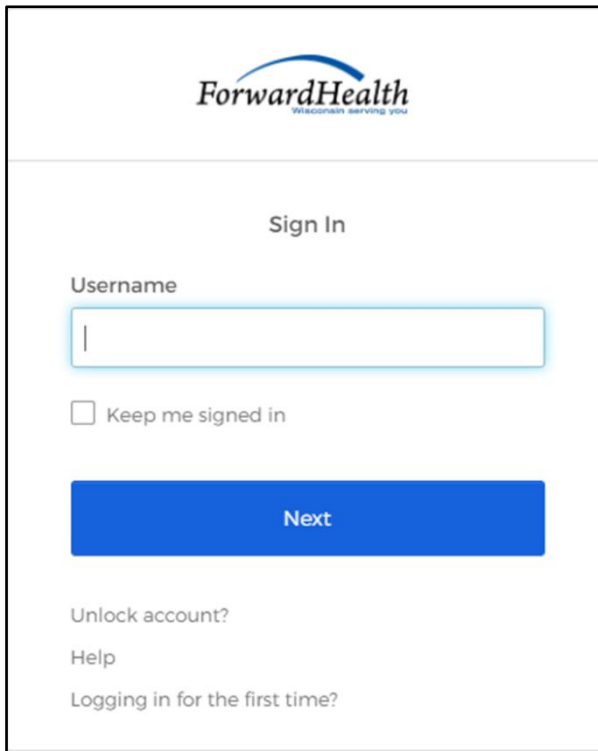
**Figure 72** Confirmation Message

## 5.3 Resetting Passwords

If you forget your password or need to reset it for any reason, you can reset it yourself by using the Password Reset function on the Portal.

1. Access the Portal at <https://www.forwardhealth.wi.gov/>. The Portal homepage will be displayed.

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



**ForwardHealth**  
WISCONSIN serving you

---

Sign In

Username

Keep me signed in

Next

[Unlock account?](#)

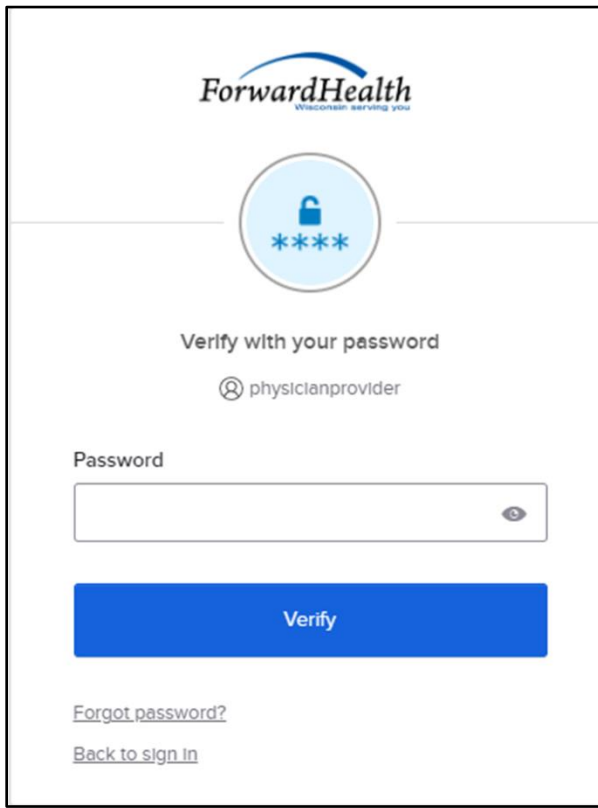
[Help](#)

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

**Figure 73** Sign In Box

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

A Verify with your password box will be displayed.



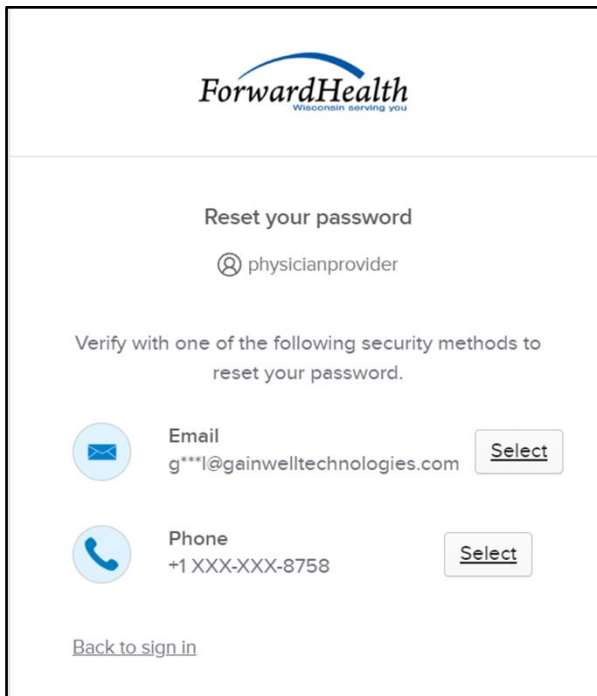
The screenshot shows a web interface for password verification. At the top is the ForwardHealth logo with the tagline 'Wisconsin serving you'. Below the logo is a circular icon containing a blue padlock and four asterisks. The text 'Verify with your password' is centered below the icon. Underneath is the user identifier 'physicianprovider' with a small circular icon to its left. A 'Password' label is positioned above a text input field. To the right of the input field is a small eye icon for toggling visibility. Below the input field is a prominent blue button labeled 'Verify'. At the bottom of the form are two links: 'Forgot password?' and 'Back to sign in'.

**Figure 74** Verify With Your Password Box

5. Click **Forgot password?**



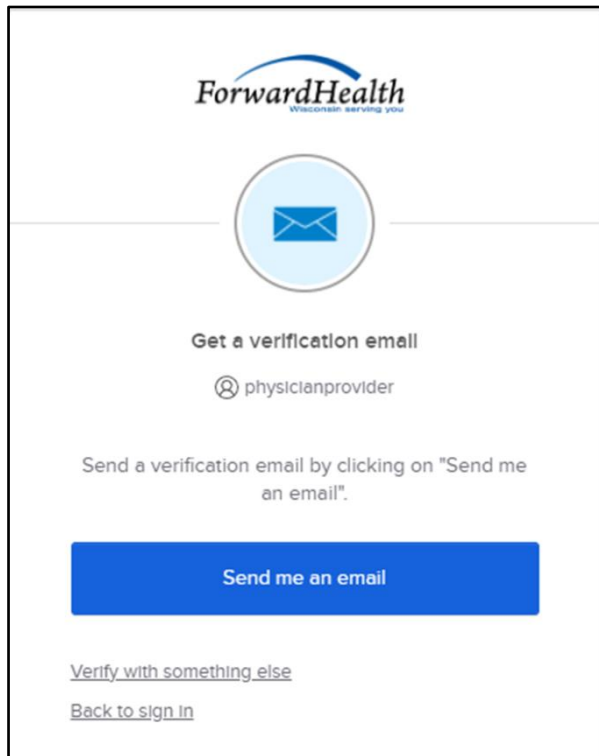
A Reset your password box will be displayed.



**Figure 75** Reset Your Password Box

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

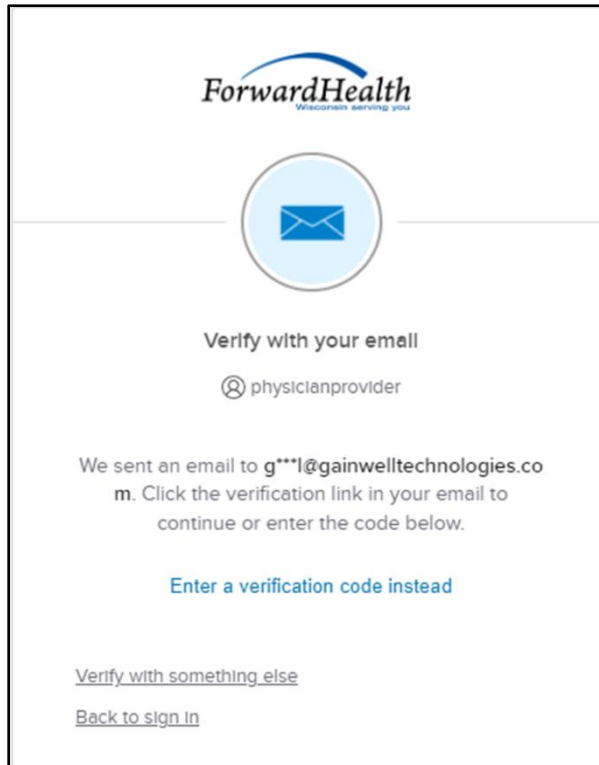
- If the user clicks **Select** for email:
  - a. A Get a verification email box will be displayed.



**Figure 76** 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.

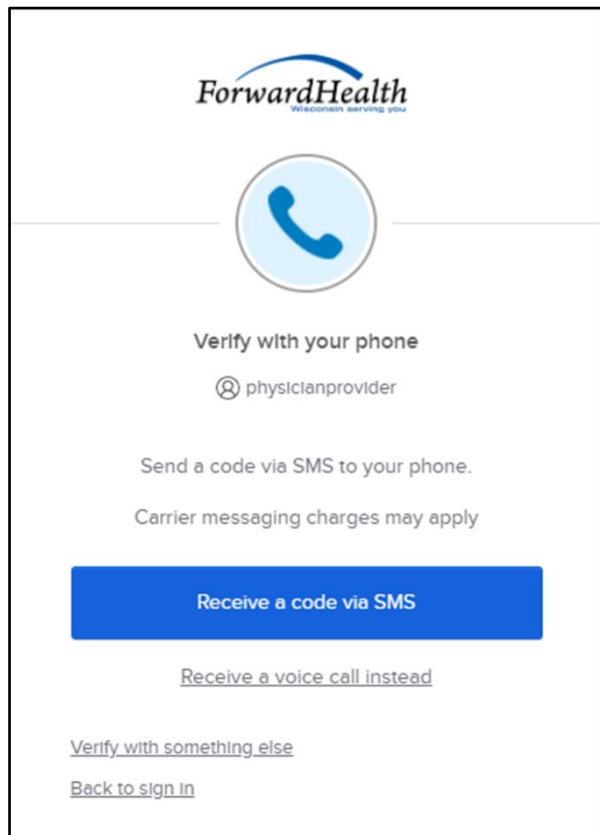
A verify with your email box will be displayed and an email will be sent.



**Figure 77** Verify With Your Email Box

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

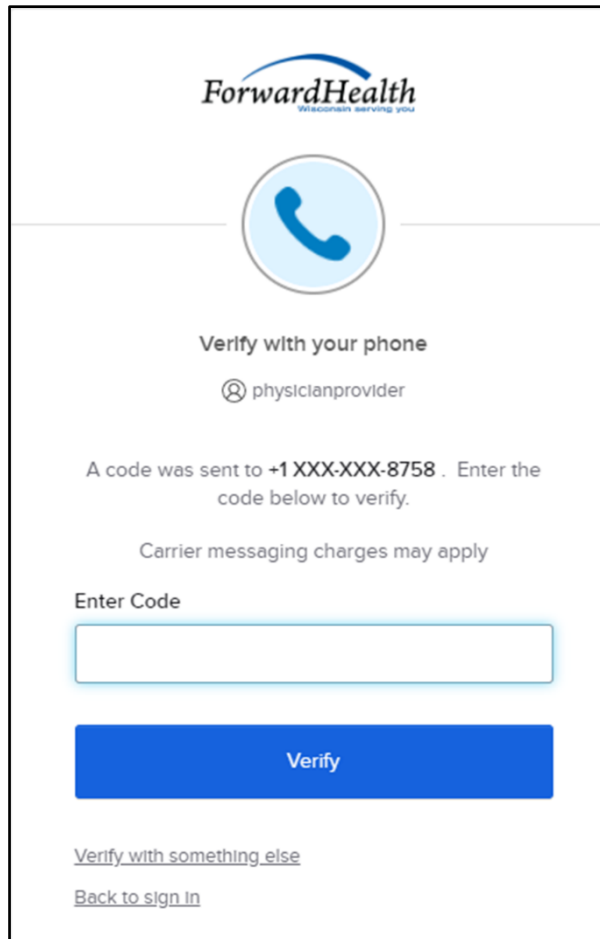
- If the user clicks **Select** for phone:
  - a. A verify with your phone box will be displayed.



**Figure 78** 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.

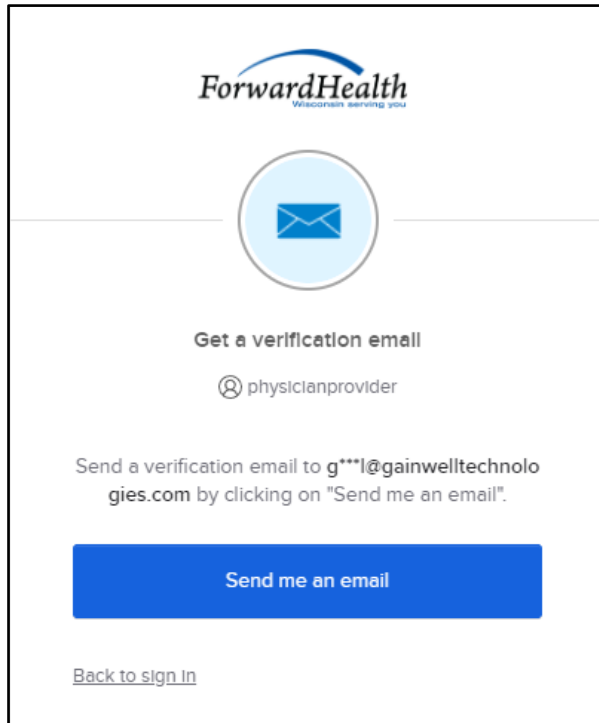


The screenshot shows a mobile verification screen for ForwardHealth. At the top is the ForwardHealth logo with the tagline 'Wisconsin serving you'. Below the logo is a circular icon containing a blue telephone handset. The main heading is 'Verify with your phone', followed by a user identifier 'physicianprovider' 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 79** Verify With Your Phone Box

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

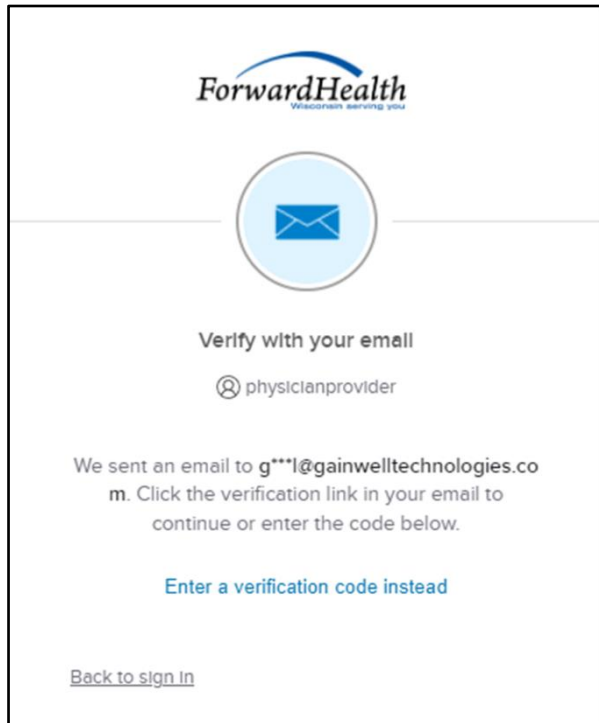
A Get a verification email box will be displayed.



**Figure 80** 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 81** 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).

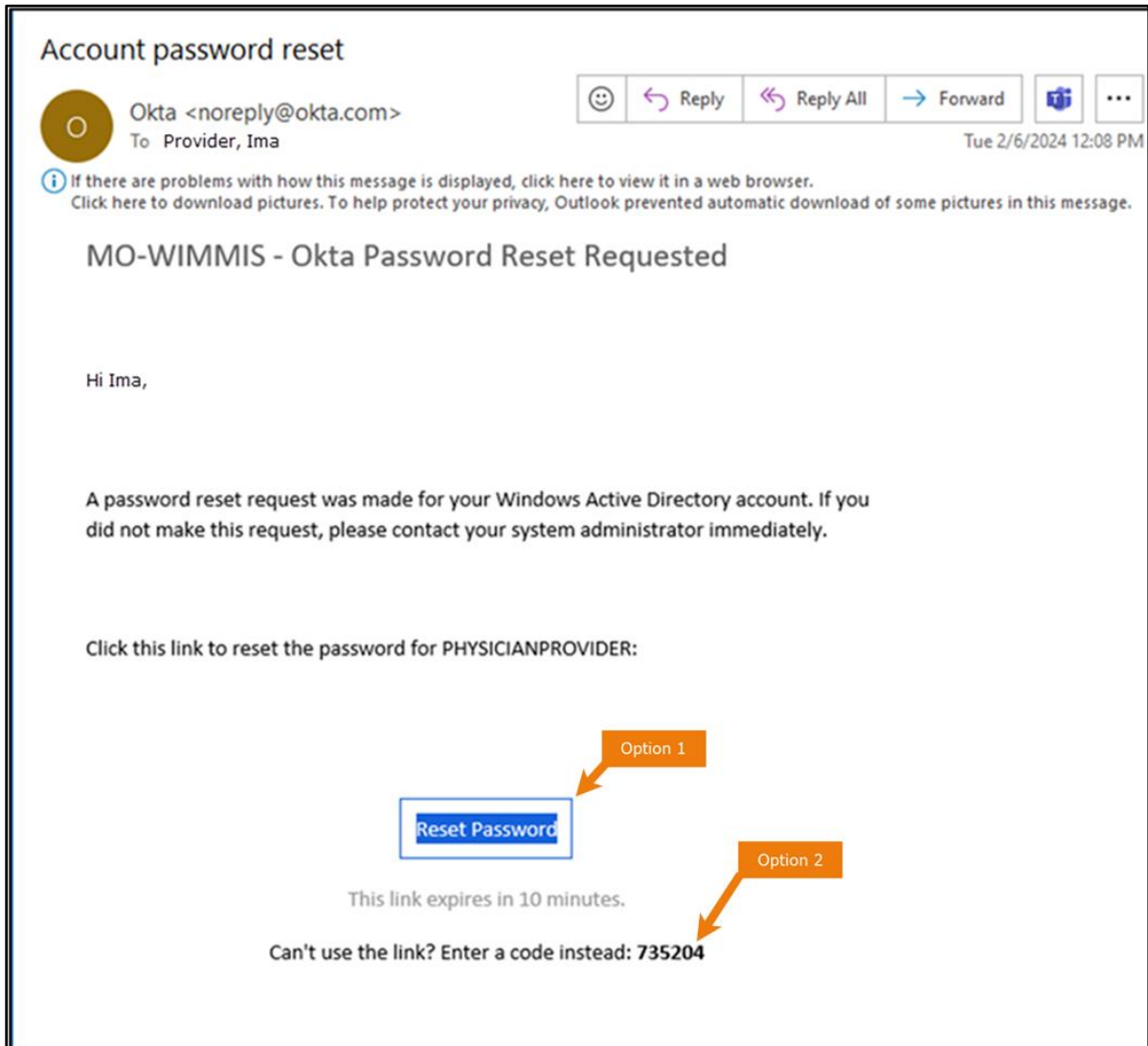
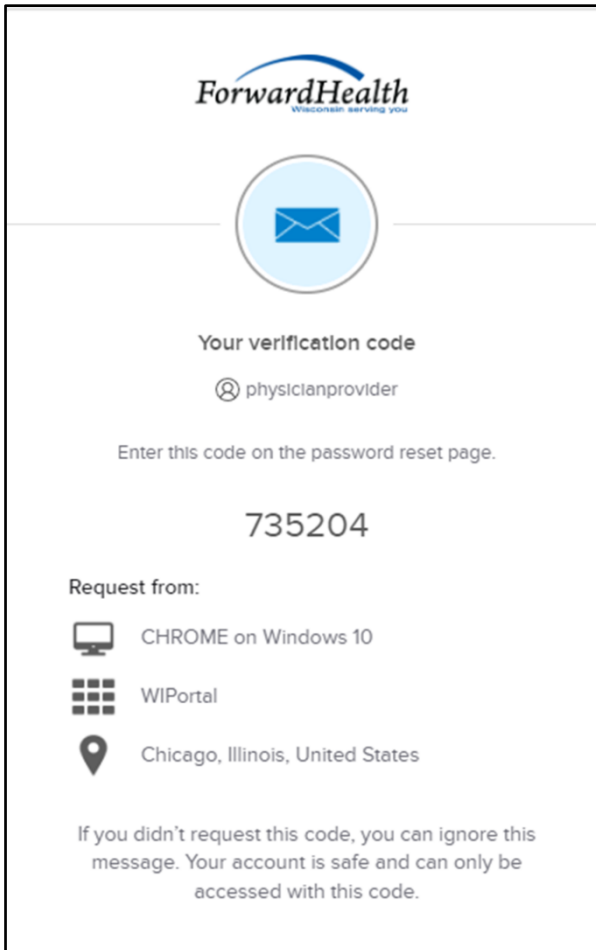


Figure 82 Account Password Reset Email

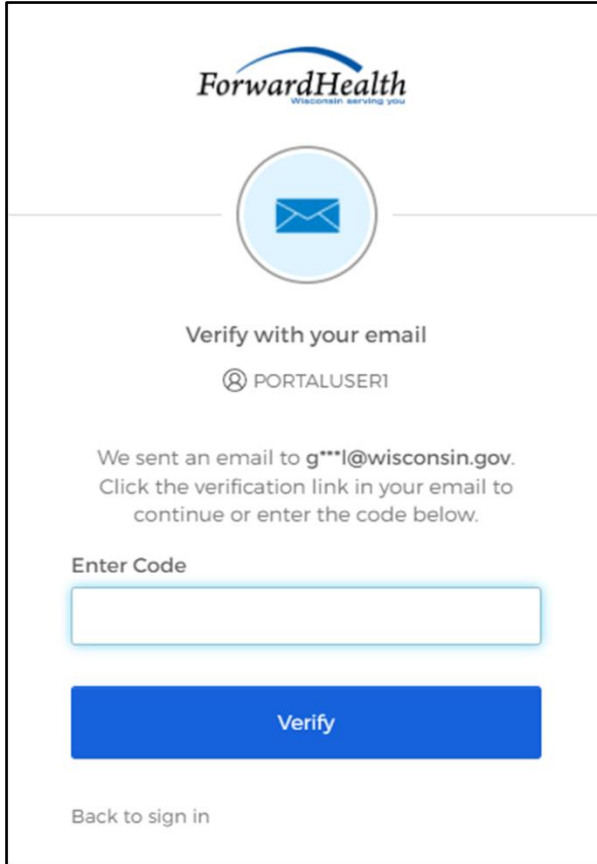


8. The user can choose to either click the **Reset Password** link (Option 1) or enter the verification code from the email (Option 2) instead.
  - Clicking the **Reset Password** link from the email will display a verification code box.




**Figure 83** Verification Code Box


- 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**.
- Enter the code from the verification code box or the code from the account password reset email and click **Verify**.



**ForwardHealth**  
Wisconsin serving you



Verify with your email

 PORTALUSER1

We sent an email to g\*\*\*l@wisconsin.gov.  
Click the verification link in your email to  
continue or enter the code below.

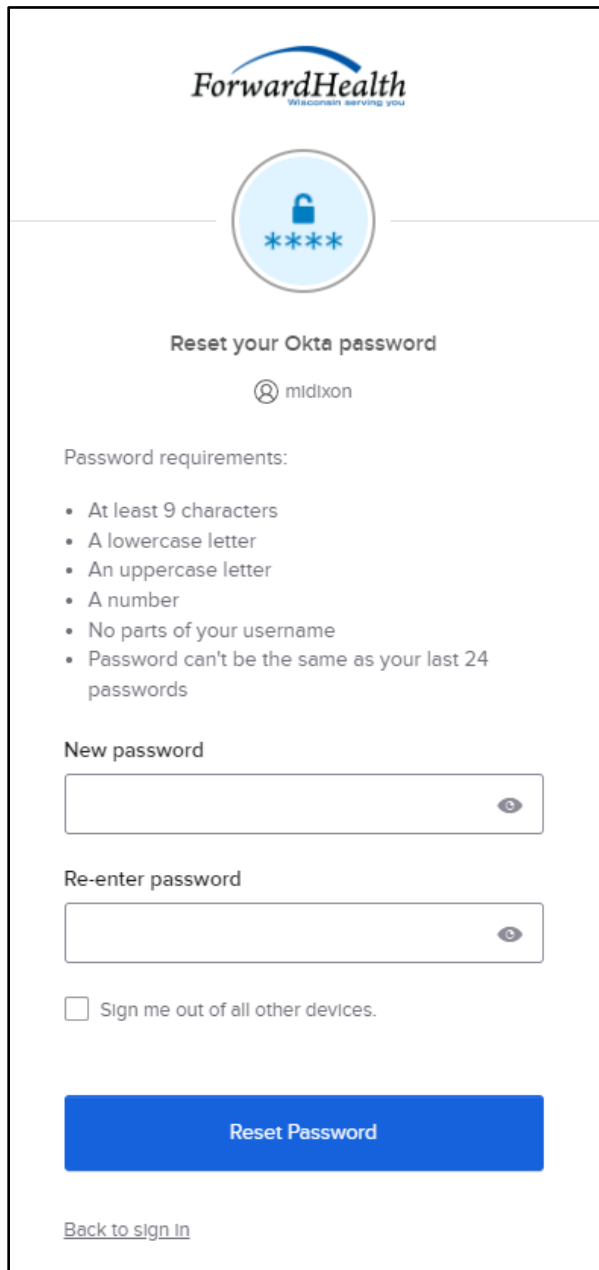
Enter Code

**Verify**

[Back to sign in](#)

**Figure 84** Verify With Your Email Box

The Reset your Okta password box will be displayed.



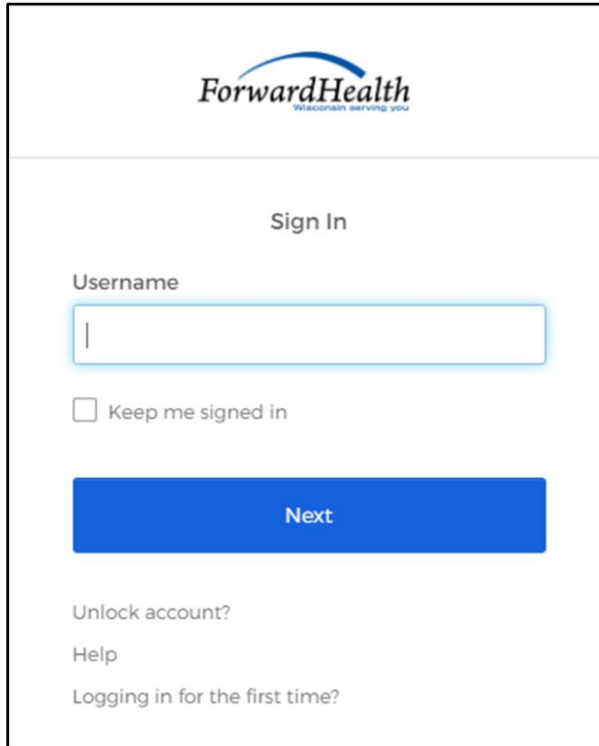
The screenshot shows a web form for resetting an Okta password. At the top is the ForwardHealth logo with the tagline 'Wisconsin serving you'. Below the logo is a circular icon containing a padlock and four asterisks. The main heading is 'Reset your Okta password' followed by the user identifier 'midixon'. A section titled 'Password requirements:' lists several criteria: at least 9 characters, a lowercase letter, an uppercase letter, a number, no parts of the username, and not being the same as the last 24 passwords. There are two input fields: 'New password' and 'Re-enter password', both with toggle icons for visibility. A checkbox labeled 'Sign me out of all other devices.' is present. A prominent blue button labeled 'Reset Password' is at the bottom, with a link 'Back to sign in' below it.

**Figure 85** 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.

## 5.4 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 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?

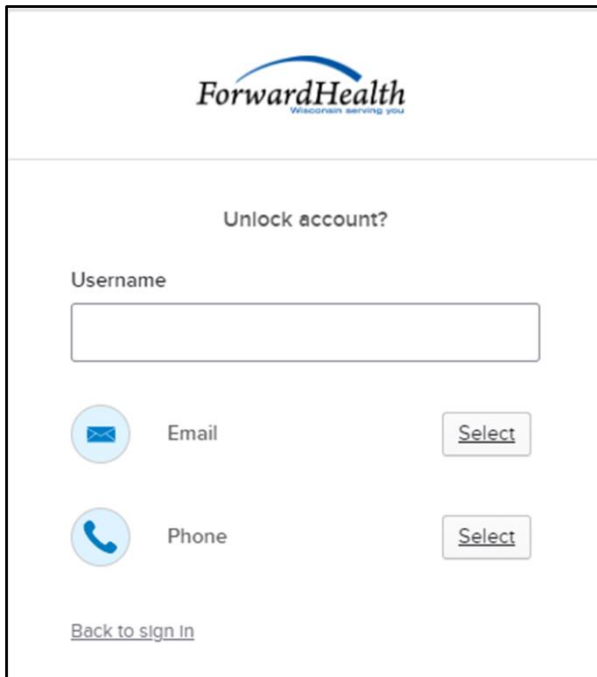
Help

Logging in for the first time?

**Figure 86** Sign In Box

3. Click **Unlock account?**

An Unlock account box will be displayed.

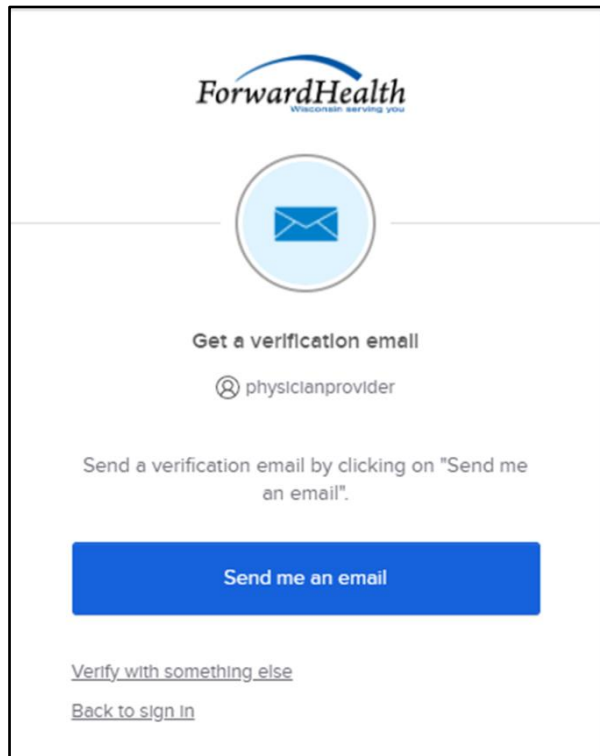


The screenshot shows the 'Unlock account?' form from ForwardHealth. At the top is the ForwardHealth logo with the tagline 'Wisconsin serving you'. Below the logo is the title 'Unlock account?'. There is a text input field labeled 'Username'. Below the input field are two radio button options: 'Email' and 'Phone'. Each option has a 'Select' button next to it. At the bottom left of the form is a link labeled 'Back to sign in'.

**Figure 87** Unlock Account Box

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

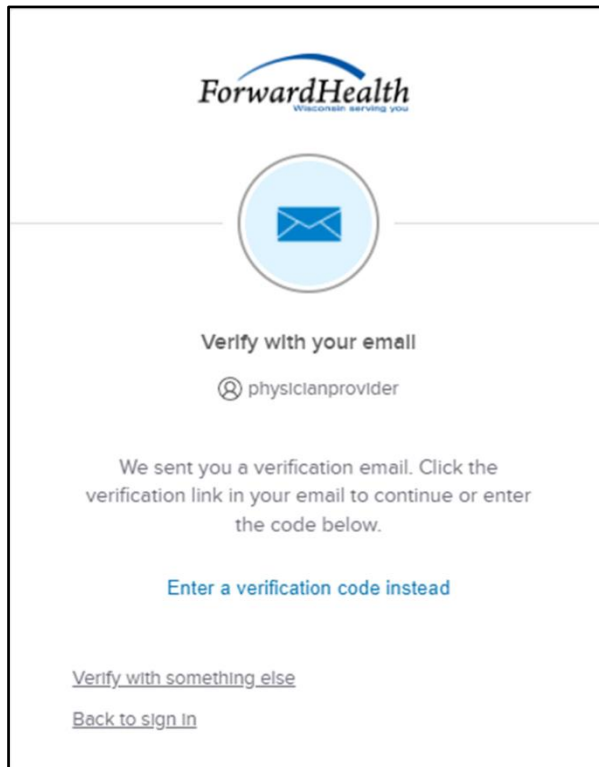
- If the user clicks **Select** for email:
  - a. A Get a verification email box will be displayed.



**Figure 88** 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.

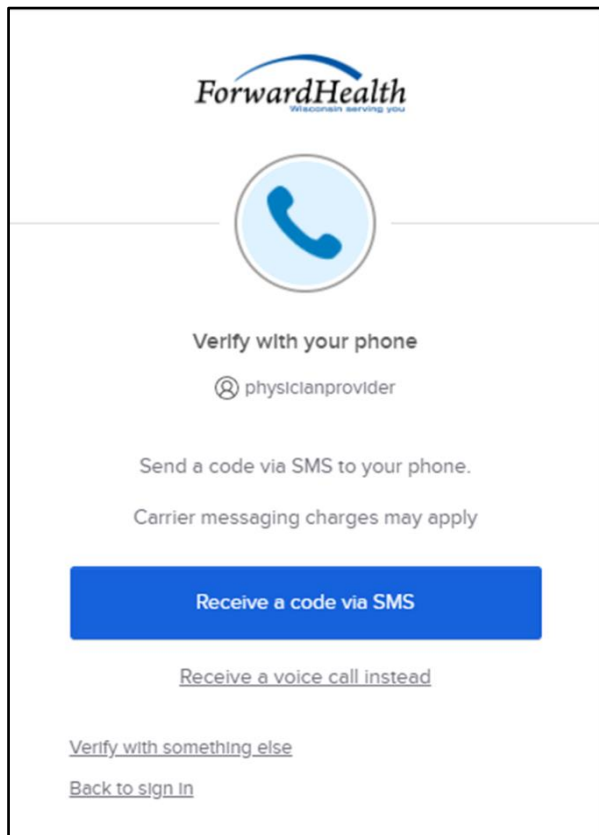
A verify with your email box will be displayed and an email will be sent.



**Figure 89** 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.

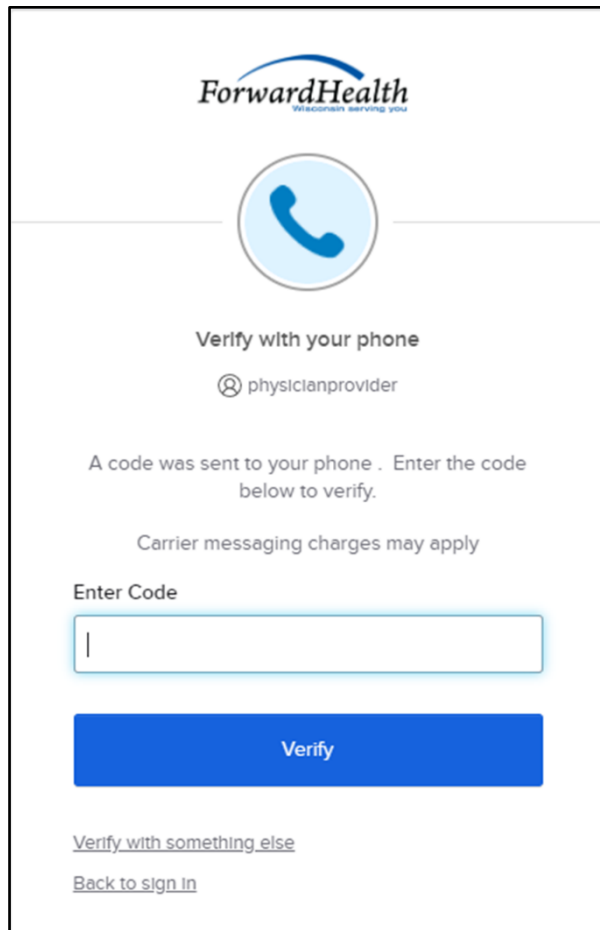


**Figure 90** Verify With Your Phone Box

- 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.

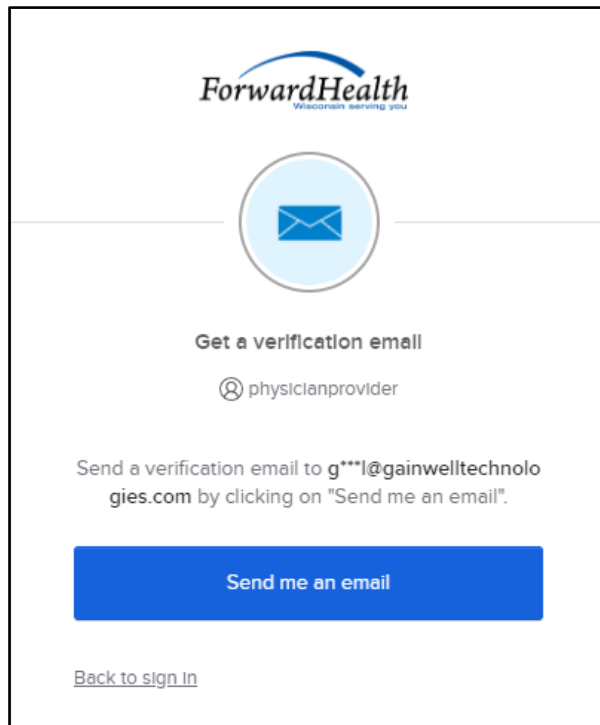


The screenshot shows a mobile verification screen for ForwardHealth. At the top is the ForwardHealth logo with the tagline 'Wisconsin serving you'. Below the logo is a circular icon containing a blue telephone handset. The main heading is 'Verify with your phone', followed by the user identifier '@ physicianprovider'. A message states: 'A code was sent to your phone . 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 vertical cursor. A large blue button labeled 'Verify' is positioned below the input field. At the bottom, there are two links: '[Verify with something else](#)' and '[Back to sign in](#)'.

**Figure 91** Verify With Your Phone Box

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

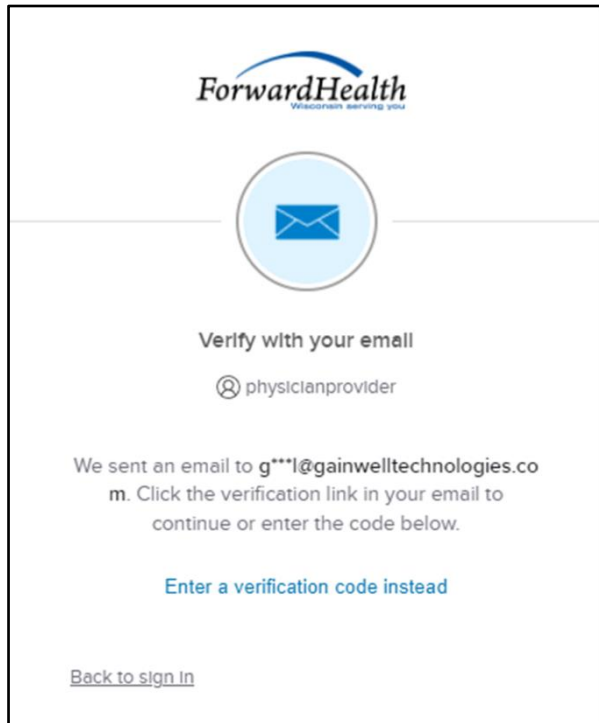
A Get a verification email box will be displayed.



**Figure 92** Get a Verification Email Box

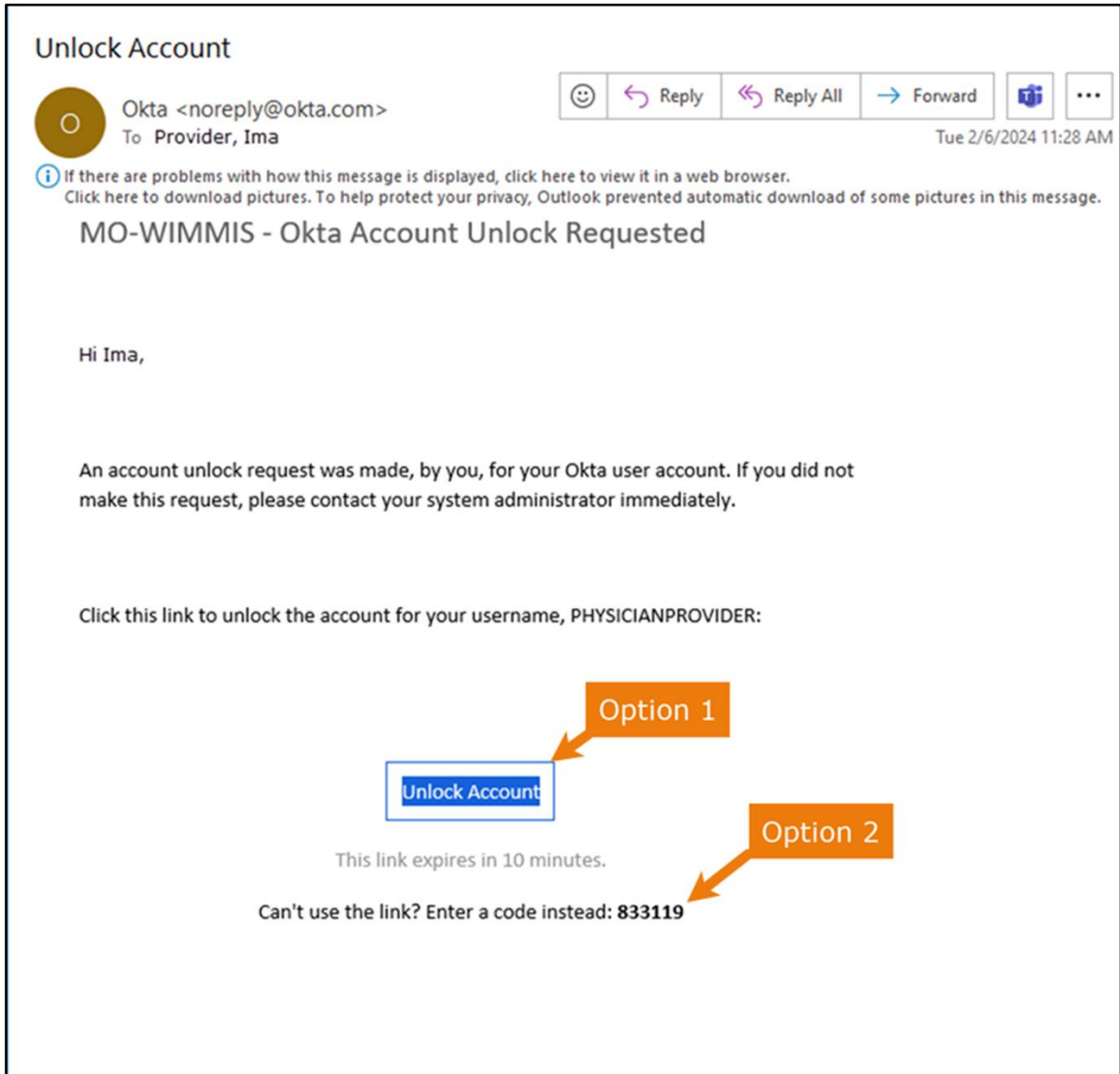
- e. Click **Send me an email**.

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



**Figure 93** Verify With Your Email Box

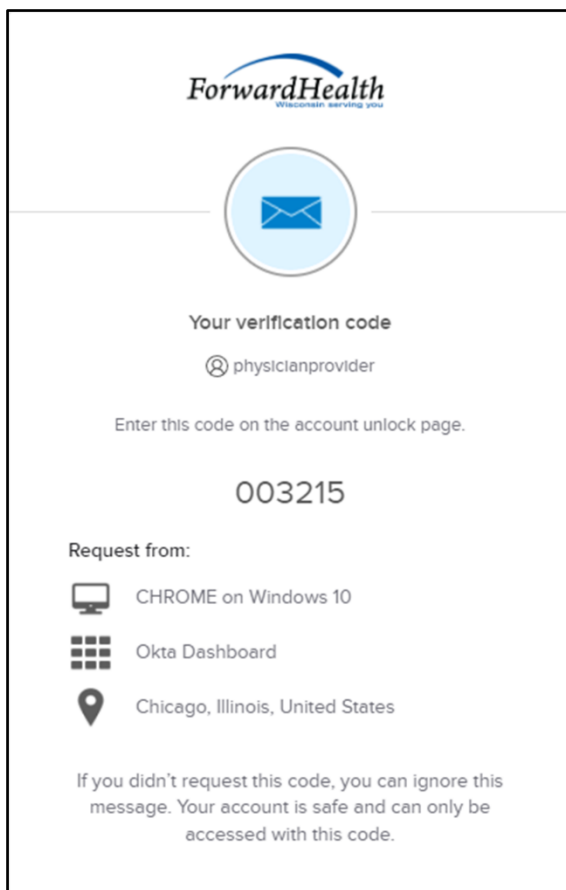
- 6. The email sent to the user’s email address includes an **Unlock Account** link (Option 1) and a verification code (Option 2).



**Figure 94** One-Time Verification Code Email

- 7. The user can choose to either click the **Unlock Account** link (Option 1) or enter the verification code from the email (Option 2) instead.

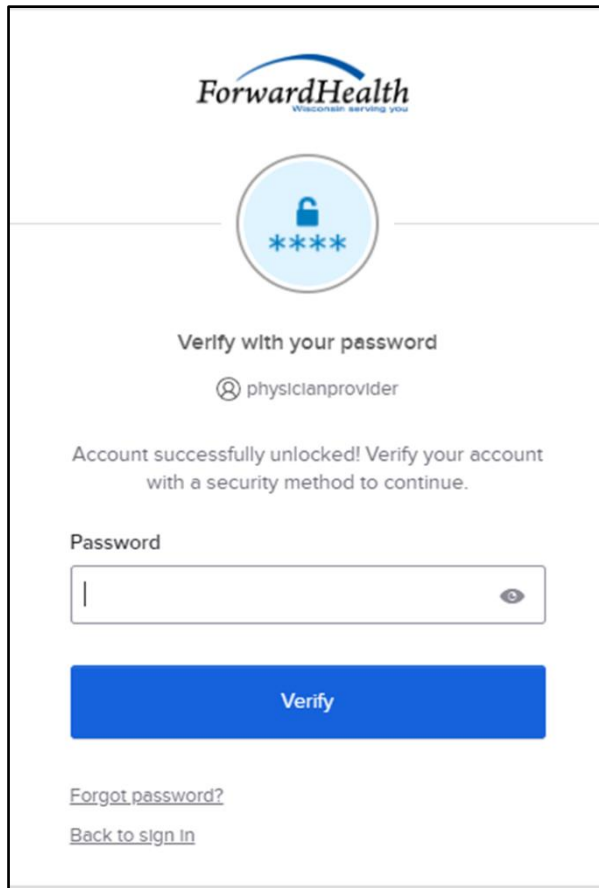
- Clicking the **Unlock Account** link from the email will display a verification code box.



**Figure 95** Verification Code Box

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

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



**ForwardHealth**  
Wisconsin serving you

\*\*\*\*

**Verify with your password**  
physicianprovider

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

Password

Verify

[Forgot password?](#)  
[Back to sign in](#)

**Figure 96** Verification Code Box

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

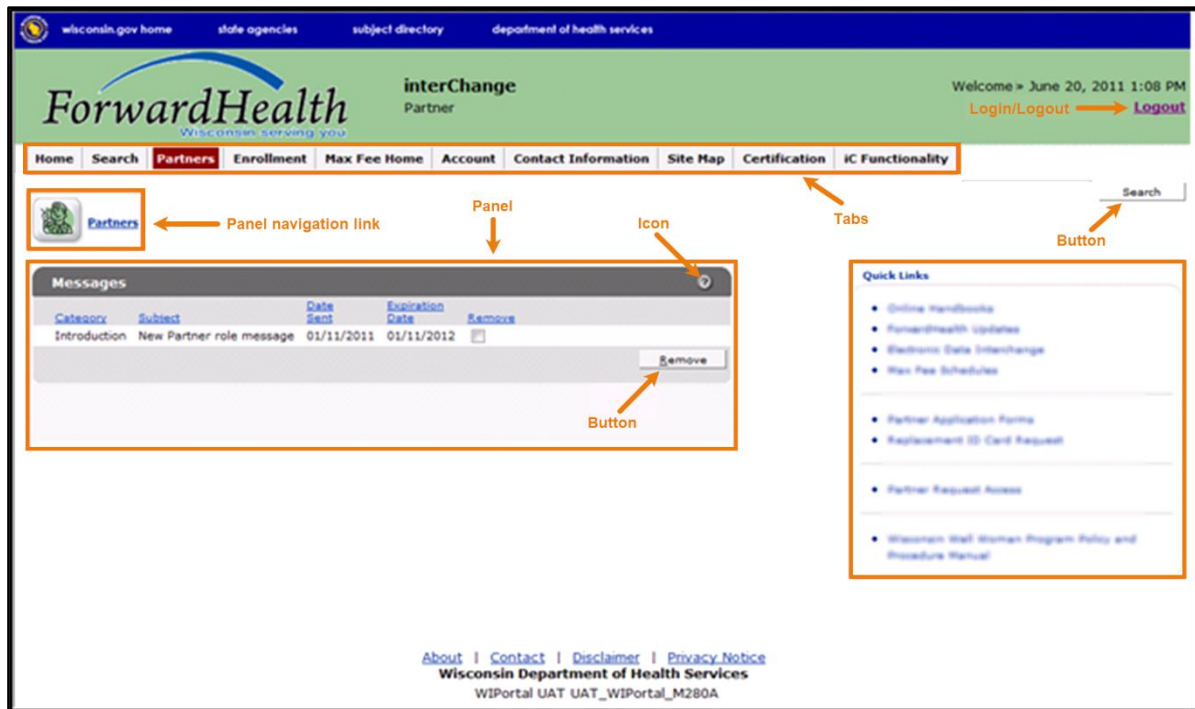
## 5.5 Logging On and Off the Portal

The quickest way to log in to the Portal is to click the **Login** link in the upper right corner of any screen and enter your username and password. Once logged in, the link changes to Logout.

When you are finished with any session, always remember to click the **Logout** link.

## 5.6 Portal Navigation

When you log in to the secure Partner area of the Portal, the initial page displayed is the Partner page. It contains many of the navigation features available on most Portal pages and allows you to easily navigate the Partner area of the Portal.



**Figure 97** Portal Navigation

- **Tabs** — Clicking on a tab in the main menu will take you to that section of the Partner area of the Portal.
- *Login/Logout* — a link that toggles between displaying the username/password text boxes (*Login*) or logging out of the system (*Logout*).
- *Other features:*
  - Links at the bottom of the page provide access to contacts and other general information (About, Contact, Disclaimer, Privacy Notice).
  - Links at the top of the page provide access to other state of Wisconsin sites (wisconsin.gov home, state agencies, subject directory, and Department of Health Services).

### 5.6.1 Buttons

Below is a list of common buttons and the operations and functions they support:

| Button | Result   |
|--------|--|
| Clear  | Clears all the information entered into the fields on a panel. |

| Button | Result  |
|--------|---|
| Close  | Closes a window, such as a popup window.  |
| Save   | Saves a modification made to a panel or a new record (for authorized users who can make updates). |
| Remove | Deletes an onscreen message.  |
| Search | Initiates a search query.   |

## 5.6.2 Error Messages

Error messages commonly appear when information is incorrectly entered, or is not entered in a required field. These error messages are displayed beneath the navigation links at the top of a panel, and may also appear next to a field that contains an error. Messages also display a warning when the user navigates away from a page.

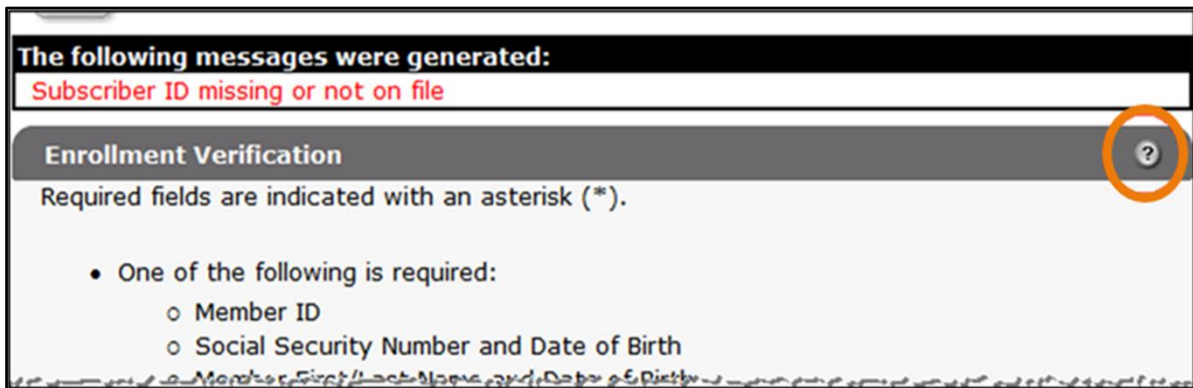


Figure 98 Sample Error Message

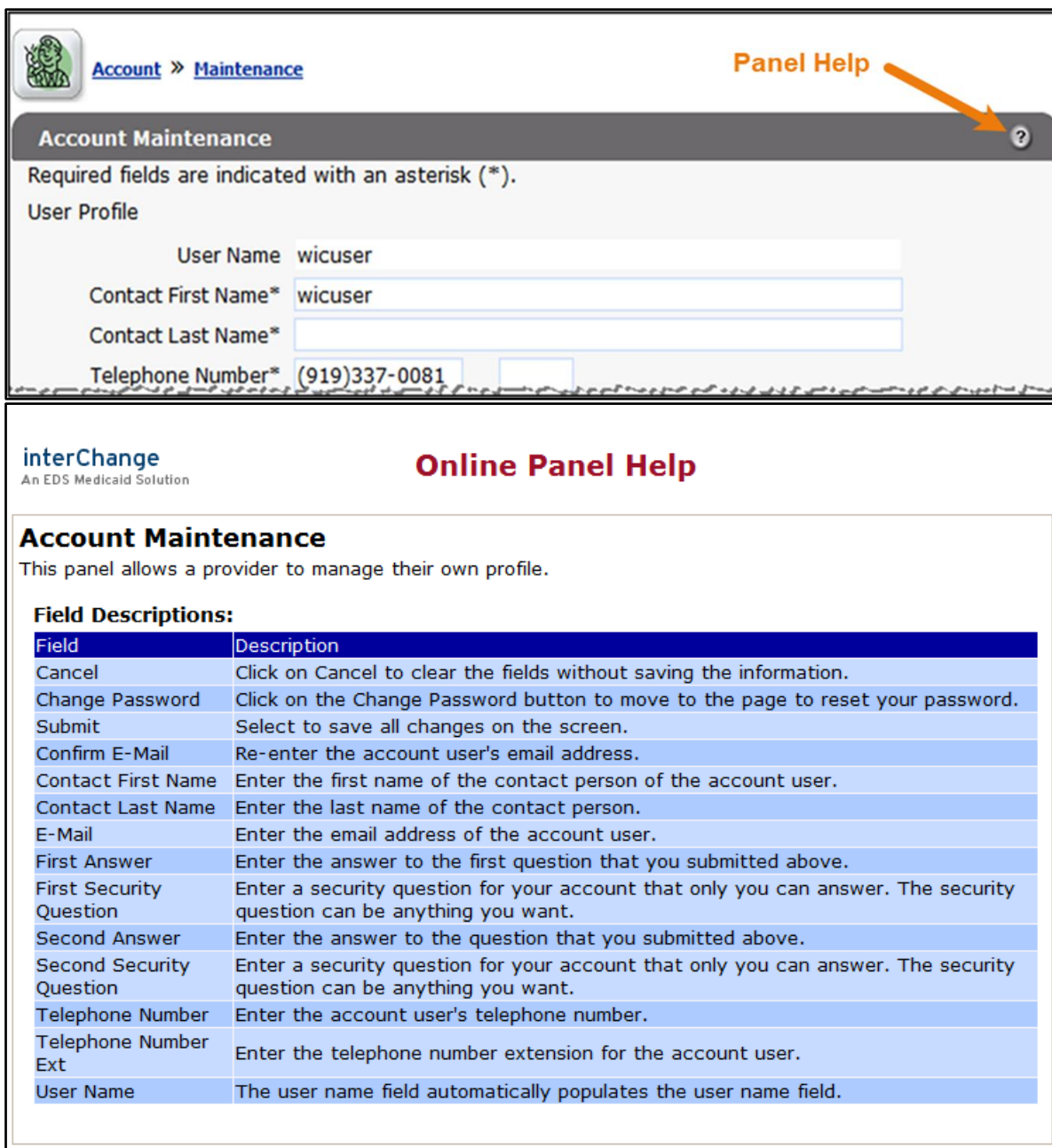
If the meaning of an error message is unclear, you can access further information about the message by clicking the question mark icon located on the gray bar at the far right side of each screen.



## 5.7 Online Help

### 5.7.1 Panel Help

Panel help is accessed by clicking the question mark icon on the gray bar located at the far right side of the panel.



**Figure 99** Panel Help Feature — Question Mark Function

The Online Panel Help page identifies the name of each field and buttons used on the panel along with descriptions and error messages. These descriptions (listed alphabetically) are the same messages the user sees when accessing the field help.

## 5.7.2 Field Help

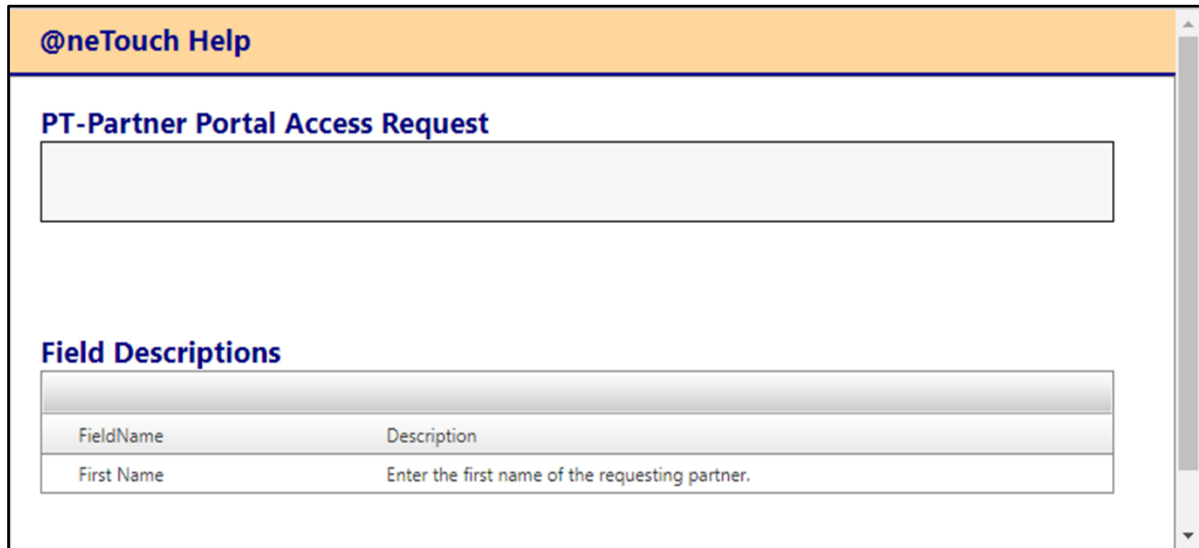
To access help on an individual field:

1. Hover the cursor over the name of a field and a question mark will appear.

The screenshot shows a web form titled "Portal Access Request Information" with a help icon in the top right corner. Below the title, it states "Required fields are indicated with an asterisk (\*)". A bulleted list provides instructions for the "Requested User ID" field: it must be alphanumeric, cannot begin with a number, must be at least 6 characters long, and cannot be greater than 20 characters. The form is divided into two sections: "User Information" and "Security Agreement". In the "User Information" section, the "First Name\*" field is highlighted with an orange box, and a mouse cursor is hovering over it, with a small question mark icon appearing next to the field name. Other fields in this section include "Last Name\*", "E-Mail Address\*", "Confirm E-Mail\*", "Requested User ID\*", "Work Phone Number\*" (with an "Ext." dropdown), "Role\*" (a dropdown menu), and "Date Requested" (pre-filled with "02/28/2024"). The "Security Agreement" section contains a scrollable text area with the following text: "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');". Below the text is a checkbox with the label "Please check the box if you have read and agreed to Wisconsin's User Security Agreement." At the bottom of the form are four buttons: "Previous", "Next", "Exit", and "Clear".

Figure 100 Field Help

2. When the question mark appears, click on the field and a description of the field will be displayed.



**Figure 101** Field Help Panel

## 5.8 Downloading Documents from the Portal

If errors occur when downloading documents, try the following:

- Make certain to allow pop-ups on the Portal.
- Add the Portal website to your list of trusted sites.
- Set the trusted sites security level to the Medium-low default setting.

Note: Contact the [Portal Help Desk](#) for assistance, if needed.

# 6 Contact Information

The following table contains contact information for ForwardHealth.

Agency Assignments Eligibility  
 PO Box 7636  
 Madison WI 53713  
 608-224-6521  
 FAX: 608-221-8815

Eligibility Supervisor 608-224-6002  
 Nursing Home Authorization 608-224-6536  
 SLMB/QMB/Buy-In 608-224-6516  
 TPL Mini Call Center 608-243-0676

## 6.1 Other Contacts

| Resources  |  |
|--|--|
| Resource   | Contact Information  |
| <p><b>Member Services</b><br/>                     Correspondents assist members, or persons calling on behalf of members, with questions about the following:</p> <ul style="list-style-type: none"> <li>• Member enrollment.</li> <li>• General program information.</li> <li>• Finding certified providers.</li> <li>• Resolving member concerns.</li> <li>• SeniorCare.</li> </ul> | <p>800-362-3002<br/>                     Available Monday through Friday, 7:00 a.m.–6:00 p.m. (Central Time, with the exception of state-observed holidays).</p> |

| <b>Resources</b>   |  |
|--|--|
| <b>Resource</b>  | <b>Contact Information</b>   |
| <p><b>ForwardHealth Provider Services Call Center</b></p> <p>Correspondents assist providers with questions about the following programs:</p> <ul style="list-style-type: none"> <li>• ADAP.</li> <li>• BadgerCare Plus.</li> <li>• Medicaid.</li> <li>• SeniorCare.</li> <li>• WWWMA.</li> <li>• WCDP.</li> <li>• WWWP.</li> <li>• Wisconsin Medicaid and BadgerCare Plus managed care programs.</li> </ul> | <p>800-947-9627</p> <p>Available Monday through Friday, 7:00 a.m.–6:00 p.m. (Central Time, with the exception of state-observed holidays).</p> |
| <p><b>ForwardHealth Portal Helpdesk</b></p> <p>Correspondents assist providers and trading partners with questions about the following:</p> <ul style="list-style-type: none"> <li>• Portal functions and capabilities.</li> <li>• Portal accounts.</li> <li>• Portal registrations.</li> <li>• Portal passwords.</li> <li>• Submissions through the Portal.</li> </ul>                                      | <p>866-908-1363</p> <p>Available Monday through Friday, 8:30 a.m.–4:30 p.m. (Central Time, with the exception of state-observed holidays).</p> |
| <p><b>Managed Care Ombudsman Program</b></p> <p>Ombudsmen assist managed care enrollees with questions about the following:</p> <ul style="list-style-type: none"> <li>• Enrollment.</li> <li>• Enrollee rights and responsibilities.</li> <li>• General managed care information.</li> </ul>  | <p>800-760-0001</p> <p>Available Monday through Friday, 7:00 a.m.–6:00 p.m. (Central Time, with the exception of state-observed holidays).</p> |
| <p><b>WiCall Automated Voice Response (AVR) System</b></p> <p>WiCall is an AVR system that allows providers with touch-tone telephones direct access to enrollment information.</p>  | <p>800-947-3544</p> <p>Press “1” to begin.</p> <p>Available 24 hours a day, seven days a week.</p>   |
| <p><b>Electronic Data Interchange (EDI) Helpdesk</b></p> <p>For providers, trading partners, billing services, and clearinghouses with technical questions about the following:</p> <ul style="list-style-type: none"> <li>• Electronic transactions.</li> <li>• Companion documents.</li> <li>• Provider Electronic Solutions (PES).</li> </ul>   | <p>866-416-4979</p> <p>Monday through Friday, 8:30 a.m.-4:30 p.m. (Central Time, with the exception of state-observed holidays).</p>           |

| Resources  |                     |
|--|---------------------|
| Resource   | Contact Information |
| <b>ForwardHealth Websites</b><br>ForwardHealth Portal — Providers, Trading Partners, Partners, HMOs — <a href="https://www.forwardhealth.wi.gov/WIPortal/">https://www.forwardhealth.wi.gov/WIPortal/</a> .<br>Members — <a href="http://dhs.wisconsin.gov/forwardhealth/">http://dhs.wisconsin.gov/forwardhealth/</a> .<br>Webcasts — <a href="http://media1.wi.gov/dhfs/catalog/">http://media1.wi.gov/dhfs/catalog/</a> . |                     |

# 7 Managed Care Special Condition Codes

| Special Condition | Description  | Aged Threshold | Aged Threshold Period |
|-------------------|--|----------------|-----------------------|
| L01               | Grandfathered (Non-MA)   | 0              |                       |
| L02               | Grandfathered (MA)   | 0              |                       |
| L03               | Non-Nursing Home Level of Care (Non-MA)                            | 0              |                       |
| L04               | Non-Nursing Home Level of Care (MA)                                | 0              |                       |
| L05               | Nursing Home Level of Care (Non-MA)                                | 0              |                       |
| L06               | Nursing Home Level of Care (MA)                                    | 0              |                       |
| SNF               | CCE/CLA/ECO - Skilled Nursing Facility                             | 0              |                       |
| ICF               | CCE/CLA/ECO - Intermediate Care Facility                           | 0              |                       |
| ISN               | CCE/CLA/ECO - Intensive Skilled Nursing                            | 0              |                       |
| SN1               | CHP - Skilled Nursing Facility                                     | 0              |                       |
| IC1               | CHP - Intermediate Care Facility                                   | 0              |                       |
| IS1               | CHP - Intensive Skilled Nursing                                    | 0              |                       |
| E71               | SSI Opt Out  | 0              |                       |
| E72               | SSI Waiver Program Opt Out   | 0              |                       |
| E73               | Commercial Insurance   | 0              |                       |
| E74               | Native American  | 0              |                       |
| E75               | Migrant Worker   | 0              |                       |
| E76               | Commercial HMO   | 6              | Months                |
| E77               | Federally Qualified Health Center (FQHC)                           | 12             | Months                |
| E78               | Nurse Midwife/Practitioner   | 9              | Months                |
| E79               | Mixed Family Medicaid/SSI Household                                | 12             | Months                |
| E80               | Distance   | 12             | Months                |
| E01               | Voluntary Disenrollment  | 12             | Months                |
| E81               | Short Term Mental Health   | 3              | Months                |
| E82               | Continuity of Care up to Six Month Exemption for Special Treatment | 3              | Months                |
| E83               | Low Birth Weight   | 12             | Months                |
| E02               | Long Term Complex Care   | 12             | Months                |
| E84               | Birth to Three   | 6              | Months                |
| E85               | Third Trimester Pregnancy  | 6              | Months                |
| E86               | Mental Retardation Diagnosis                                       | 0              |                       |
| E87               | Ninth Month Pregnancy  | 3              | Months                |

| <b>Special Condition</b> | <b>Description</b>                | <b>Aged Threshold</b> | <b>Aged Threshold Period</b> |
|--------------------------|-----------------------------------|-----------------------|------------------------------|
| E88                      | Transplants                       | 0                     |                              |
| E03                      | Just Cause                        | 0                     |                              |
| E89                      | HIV Positive/AIDS                 | 0                     |                              |
| E91                      | High Risk Pregnancy               | 9                     | Months                       |
| E92                      | Mental Health                     | 12                    | Months                       |
| E93                      | Methadone Treatment               | 12                    | Months                       |
| E96                      | HIPP Determination Occurring      | 0                     |                              |
| E97                      | HIPP Employer Insurance Confirmed | 0                     |                              |
| E99                      | Disaster Evacuee                  | 0                     |                              |



## 8 Common Buy-In Premium Transaction Codes

| Common Buy-In Premium TXN (Transaction) Codes |   |
|---|---|
| 51  | Deletion Action to delete a beneficiary because the beneficiary is no longer a member of the States coverage group. |
| 61  | Accretion Action [system generated].  |
| 63  | Accretion Action for subsequent State analysis [manually generated].  |
| 75  | Simultaneous accretion/deletion action (closed period).   |

| Common Buy-In Bill TXN Codes |   |
|------------------------------|---|
| 1161                         | This code informs the State that an accretion submitted by the State has been added to the TPM [third party master]. [The accretion record was system generated.]   |
| 1163                         | This code informs the State that an accretion submitted by the State has been added to the TPM [third party master]. [The accretion record was manually generated.]   |
| 1180                         | This code informs the State which has a 1634 Agreement (auto-accrete State) that CMS has established a buy-in record for an SSI recipient.  |
| 15                           | This code informs the State that the individual was deleted from the State's account because SSAs records indicate that the individual currently does not meet all the requirements for Medicare (such as age, citizenship, or residency).                |
| 16                           | This code informs the State that according to SSA/CMS records the beneficiary is deceased. CMS has deleted the beneficiary from the account.  |
| 1751                         | This code informs the State that the beneficiary was deleted from the State's account based on a deletion record submitted by the State. The code 1751 is limited to the current month or the following month.  |
| 1753                         | This code informs the State that the beneficiary was deleted from the State's account based on a death deletion record submitted by the State.  |
| 41                           | Informs the State that the individual is on the State's rolls as an ongoing item. The State is responsible for paying the individual's Medicare premium and has deletion responsibility if the beneficiary is no longer eligible for Buy-in.              |
| 4375                         | This code informs the State that a simultaneous accretion/deletion (closed period) has been added to the TPM. The closed period may be the result of a single State input record or may be the result of one or more adjustments to a State input record. |

# 9 Appendix: Portal Help Desk Support

Users may contact the ForwardHealth Portal Helpdesk with questions about configuring supported Web browsers or technical questions on Portal functions, including Portal accounts, registrations, passwords, and submissions through the Portal.

- Phone: 866-908-1363
- Email: [vedswiedi@wisconsin.gov](mailto:vedswiedi@wisconsin.gov)