# User Guide

# ForwardHealth Partner Portal

February 17, 2025

**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 HIV Drug Assistance Program (HDAP)

- 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.

  o  Example: SeniorCare and Qualified Medicare Beneficiary (QMB).

  o  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.
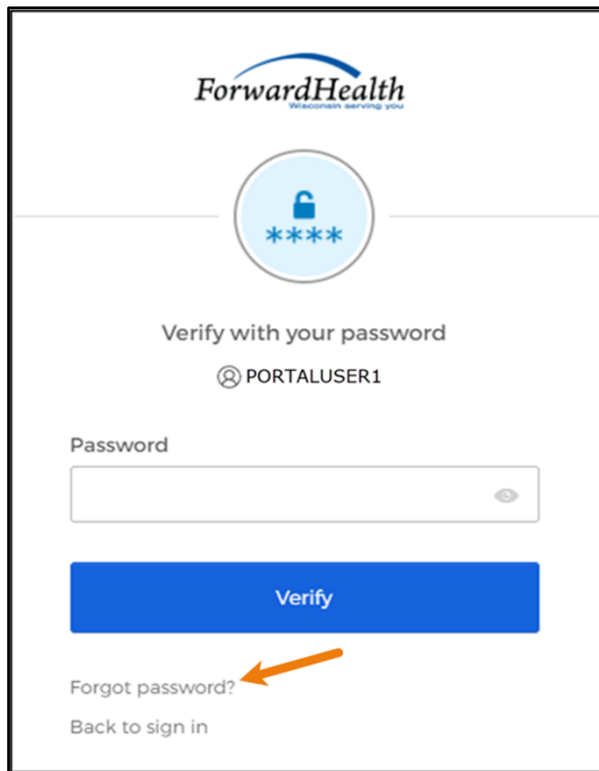
# 2 Passwords and Security

## 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.



**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.
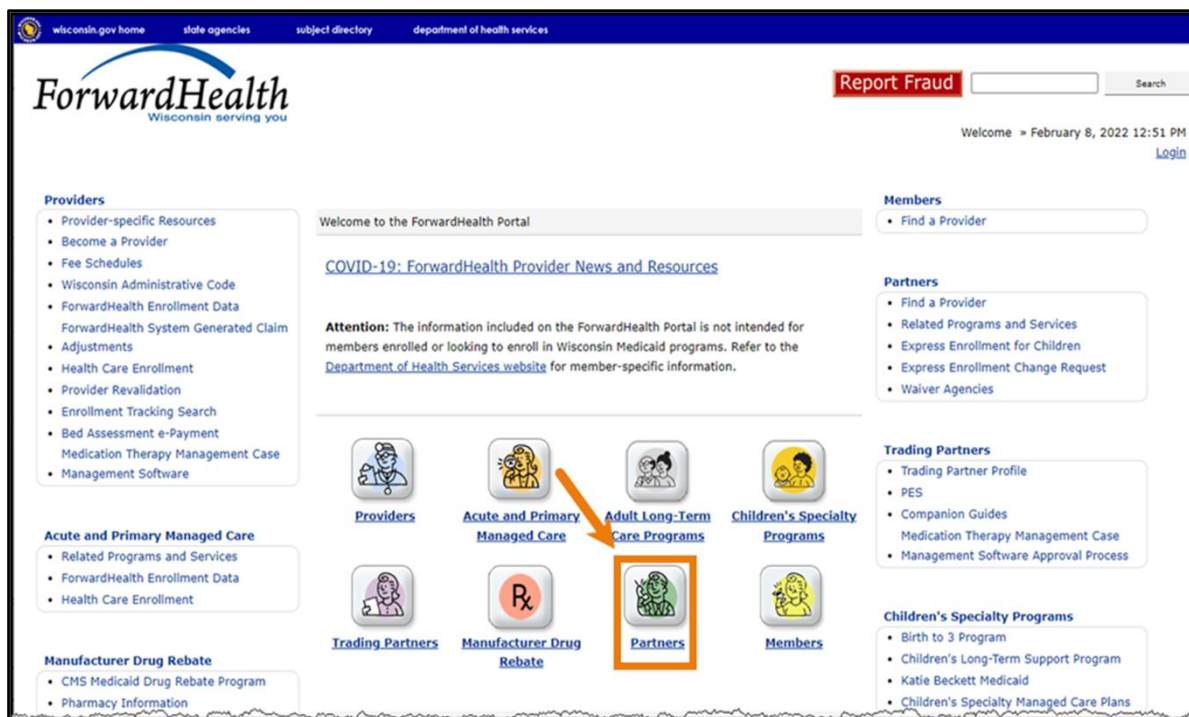


**Figure 2**  ForwardHealth Public Portal Homepage

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.
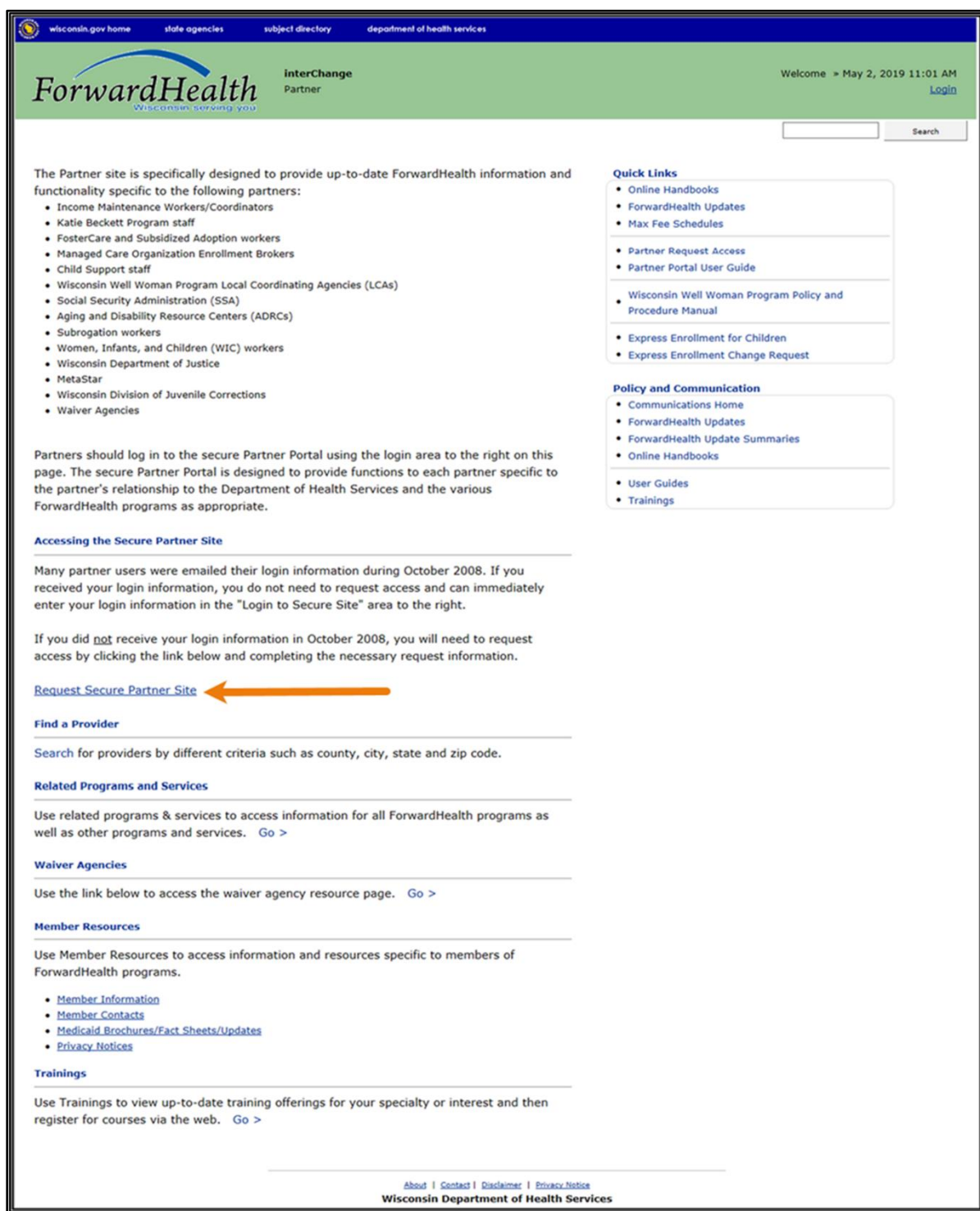


**Figure 3**  Public Partner Homepage

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.
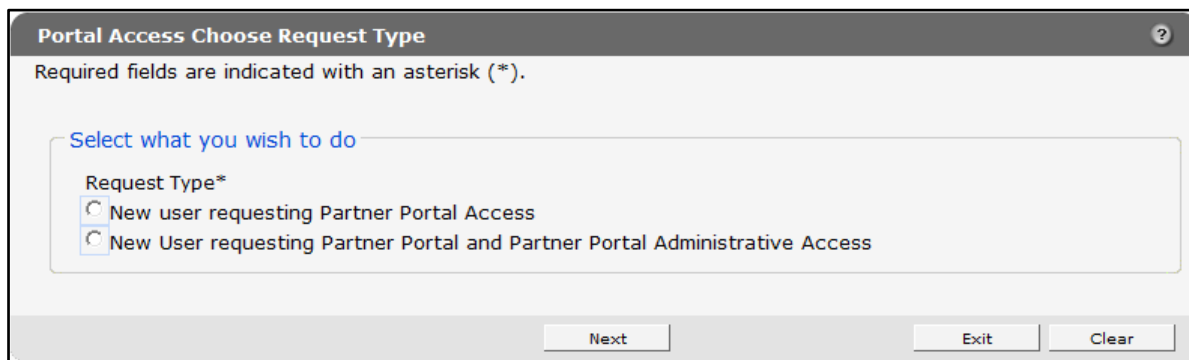


**Figure 4**  Portal Access Choose Request Type Page.

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.



**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.

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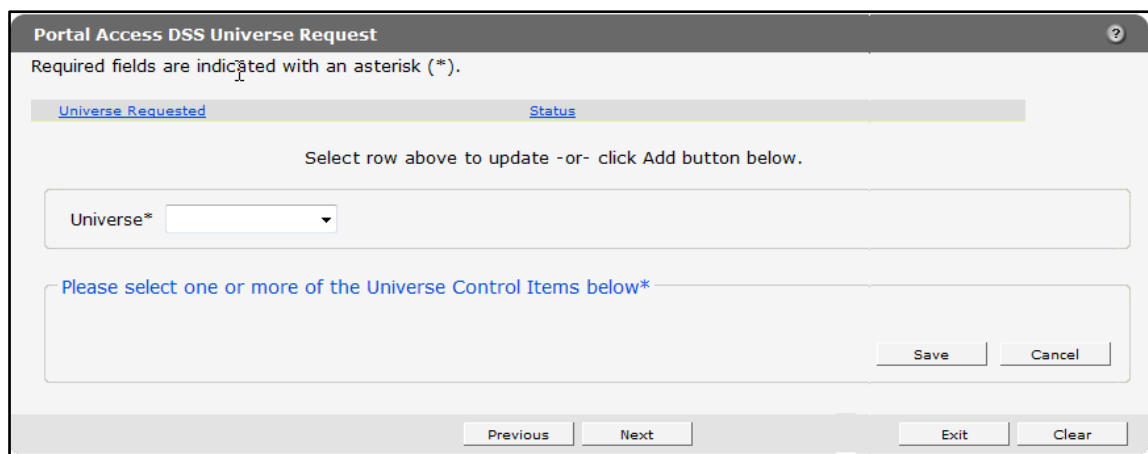


**Figure 6**  Portal Access Additional Information Panel

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

6.  Select your certifying agency code using the drop-down menu at the top of the panel.

7.  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

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

9.  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.



**Figure 8**  Universe Control Item Selections

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

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



**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.
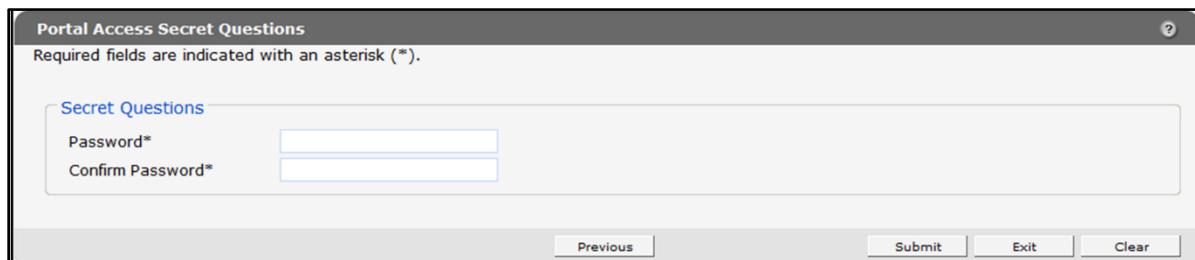


**Figure 10**  Portal Access Secret Questions Page

13. Create a password that you will use to log on to the Portal according to the guidelines in Section 2.1 General Password Guidelines. Retype the password to confirm it is correct.

14. Click **Submit**.

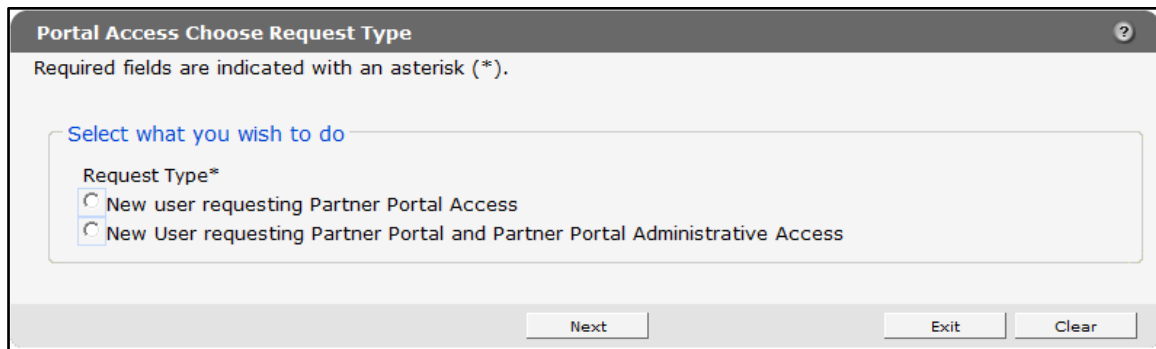    If the submission is successful, the following message will be displayed.



**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.



**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.



**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.

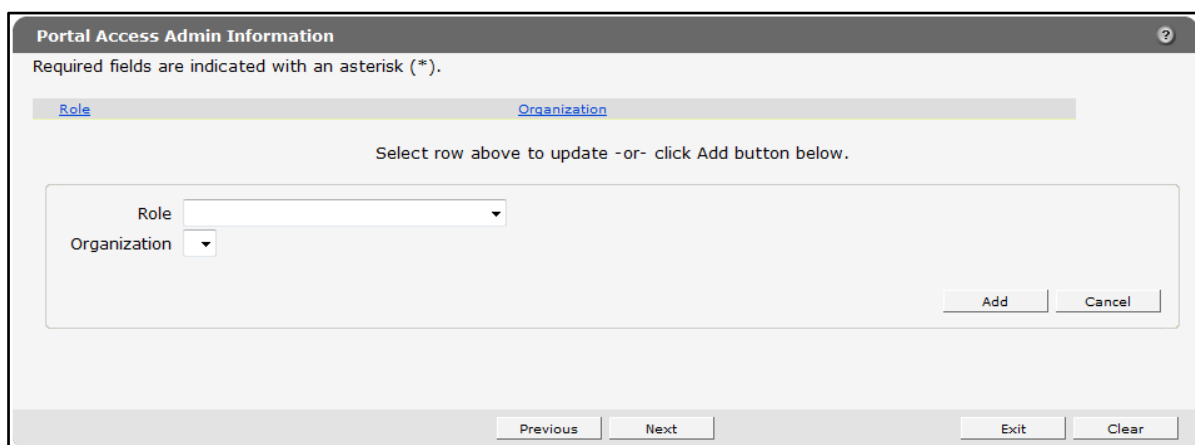7.  Click **Next**. The Portal Access Additional Information panel will be displayed.



**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.



**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.



**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 <span>step 19</span>.

- 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.

17. 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.

18. 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

19. Create a password that you will use to log on to the Portal according to the guidelines in Section 2.1 General Password Guidelines. Retype the password to confirm it is correct.

20. 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.
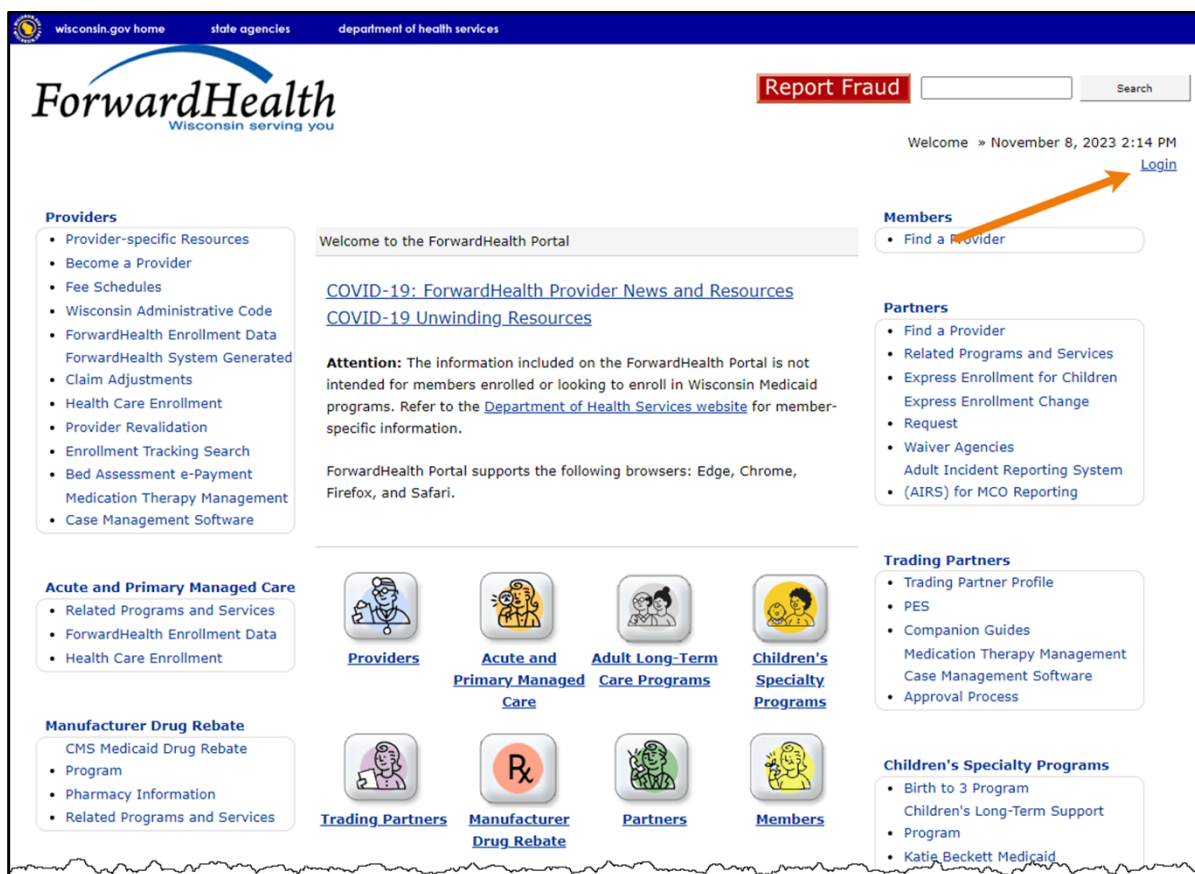


**Figure 23** ForwardHealth Portal Homepage

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



**Figure 24**  Sign In Box

3.  Enter the user's username.

4.  Click **Next**.

A Verify with your password box will be displayed.



**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.
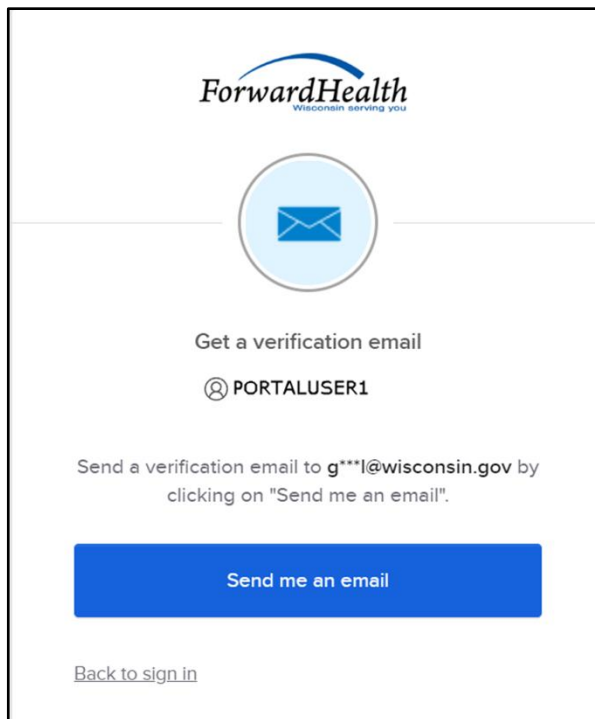


**Figure 26**  Get a Verification Email Box

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.
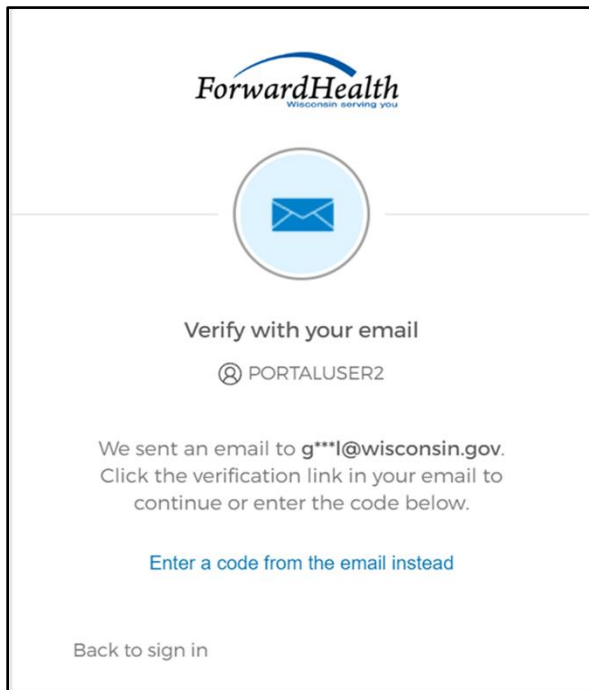


**Figure 27**  Verify With Your Email Box

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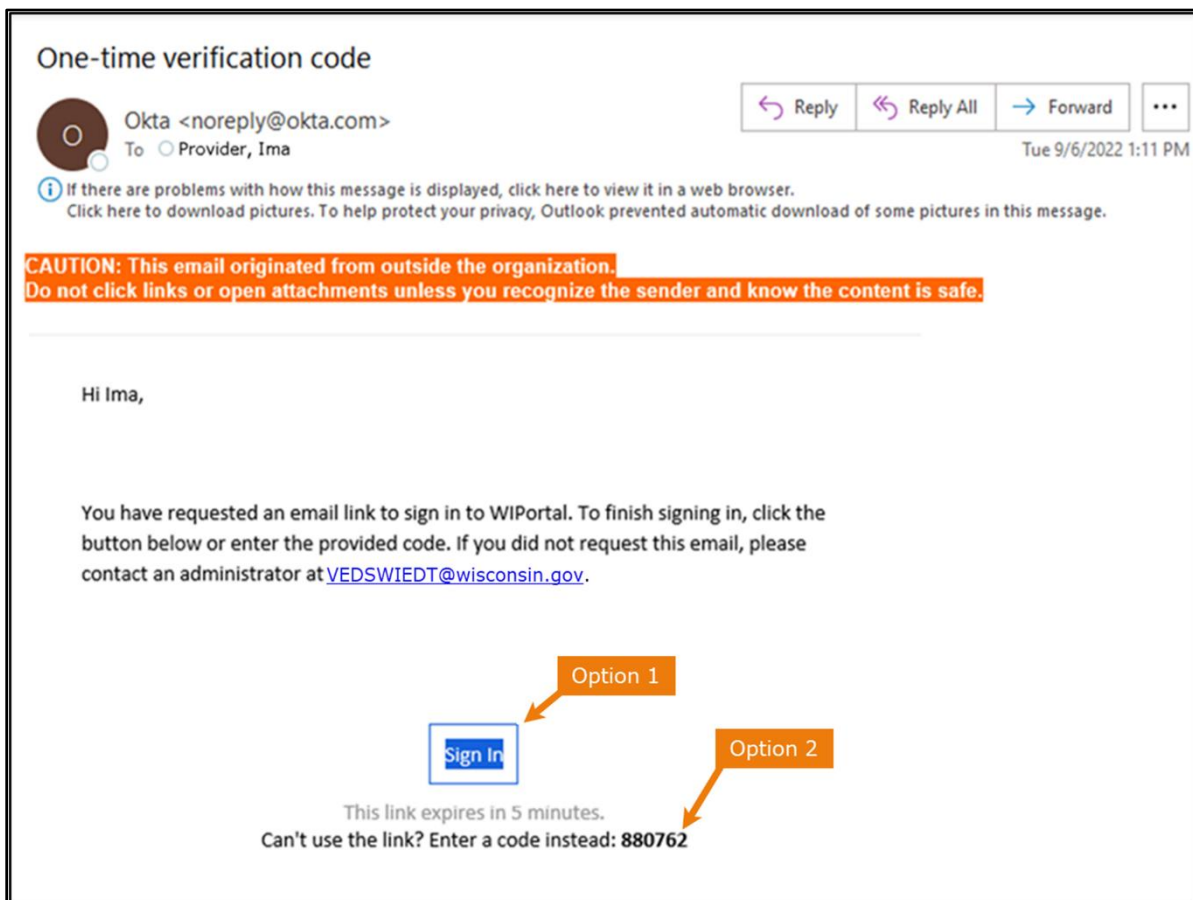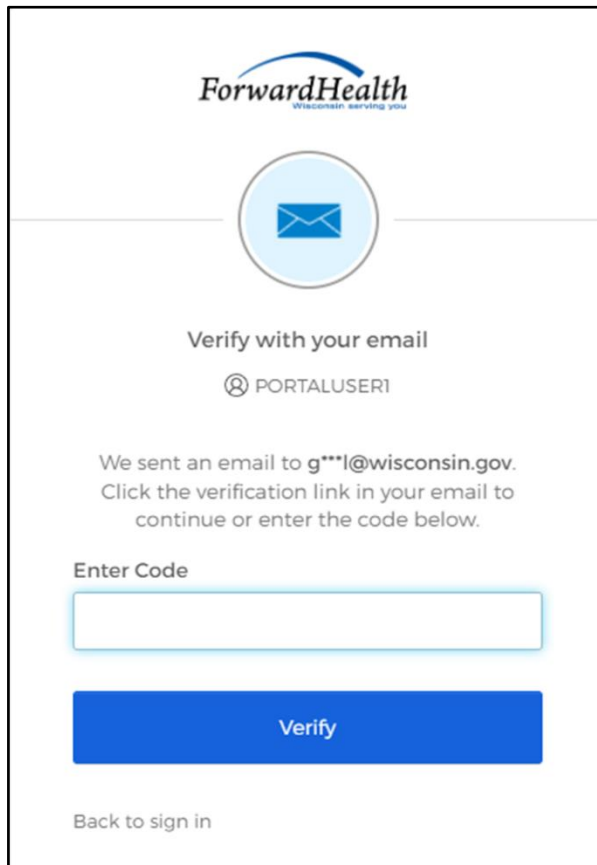


**Figure 28** One-Time Verification Code Email

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.**



**Figure 29**  Verify With Your Email Box

A Set up security methods box will be displayed.
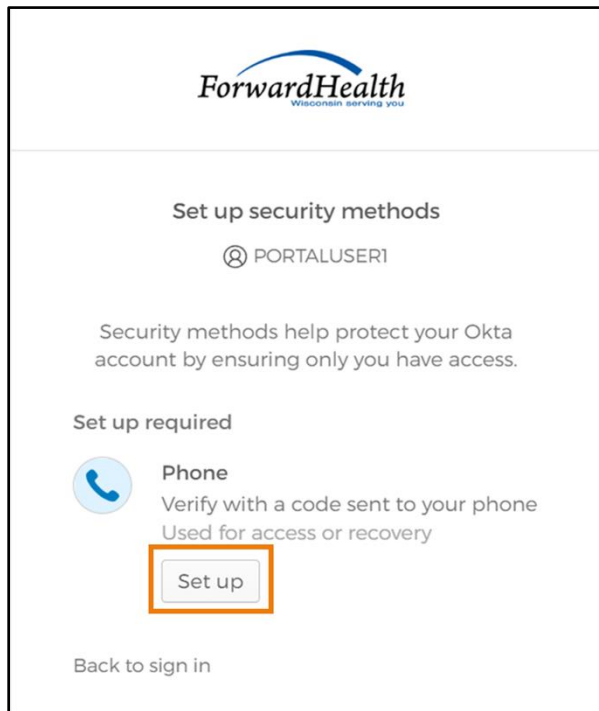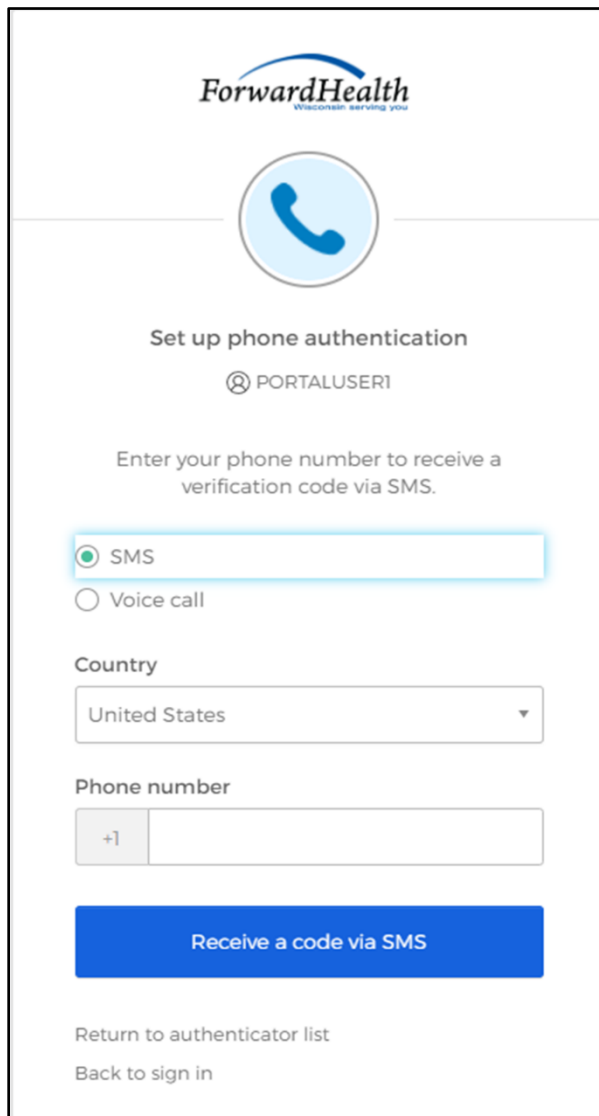


**Figure 30**  Set Up Security Methods Box

10. Click **Set up**.

A Set up phone authentication box will be displayed.
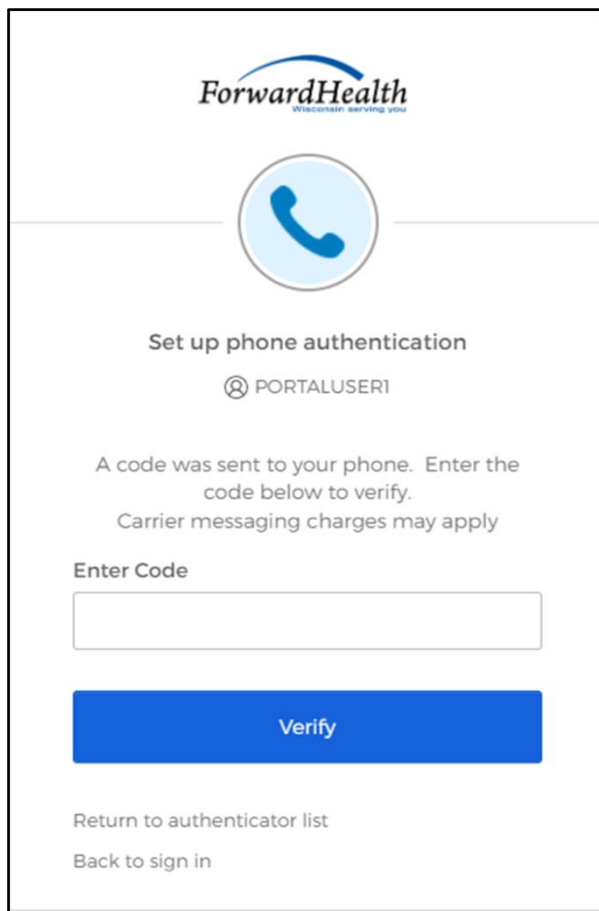


**Figure 31**  Set Up Phone Authentication Box

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.



**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.



**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.
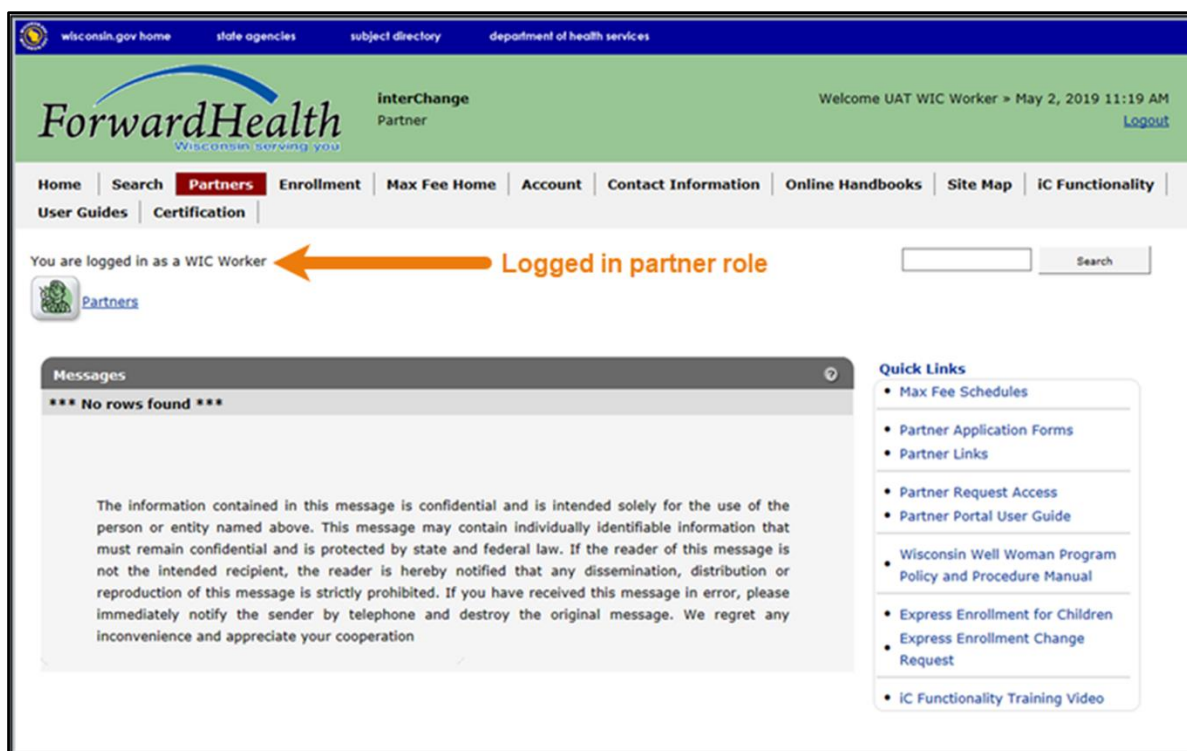


**Figure 34**  ForwardHealth Secure Partner Homepage

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
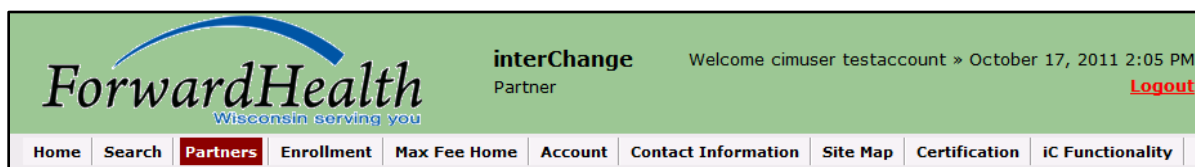


**Figure 35**  Main Menu Buttons

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.
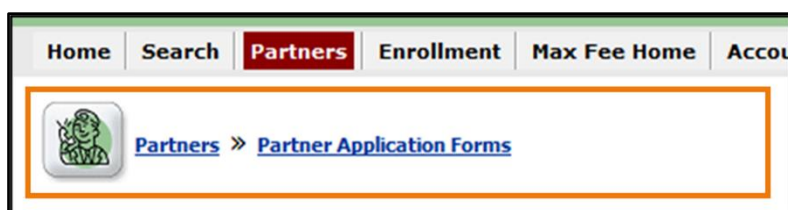


**Figure 36**  Portal Navigation Map

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 5.6 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.
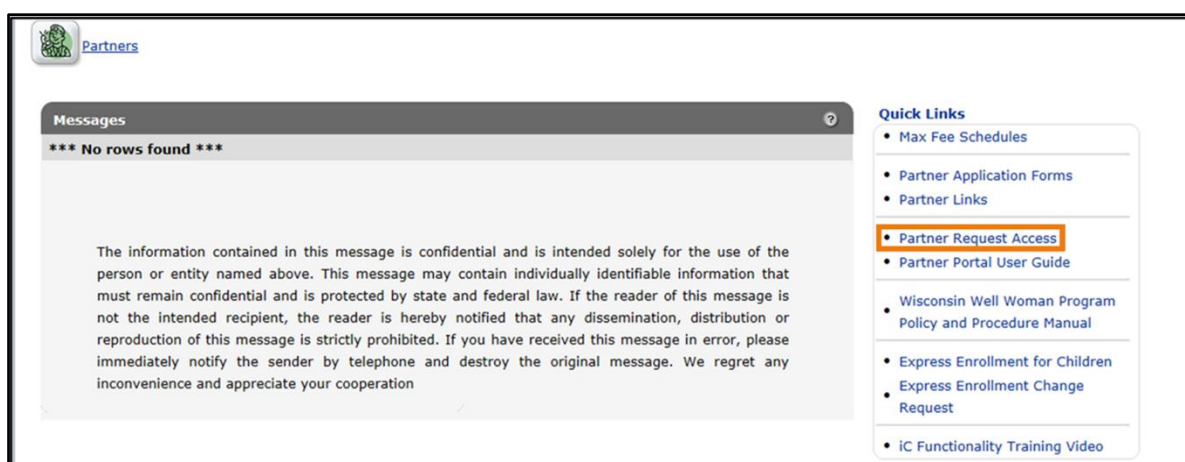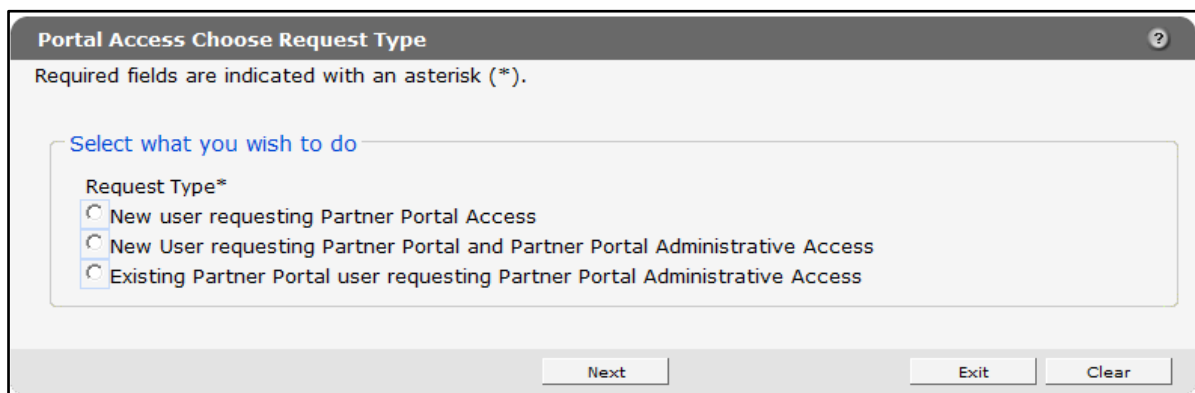


**Figure 37**  Partner Request Access Link
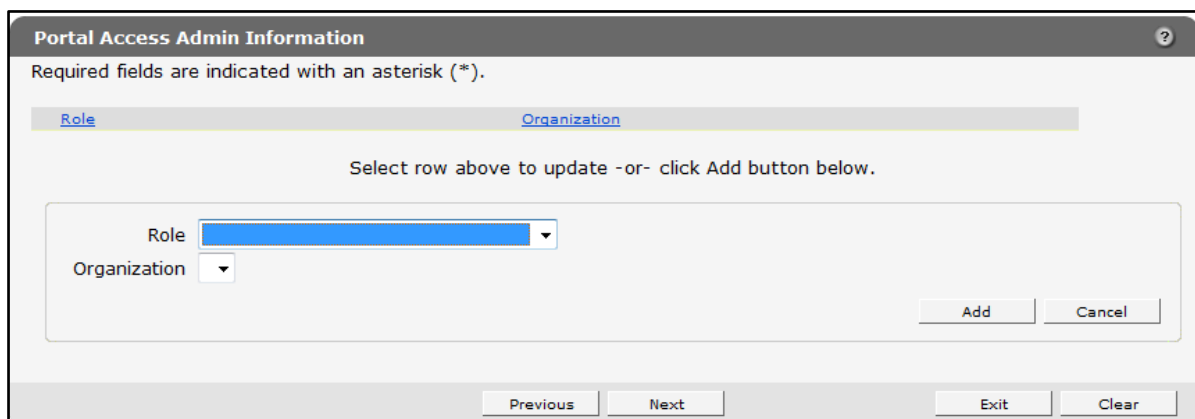
The Portal Access Choose Request Type page is displayed.



**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.



**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.



**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.



**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**.

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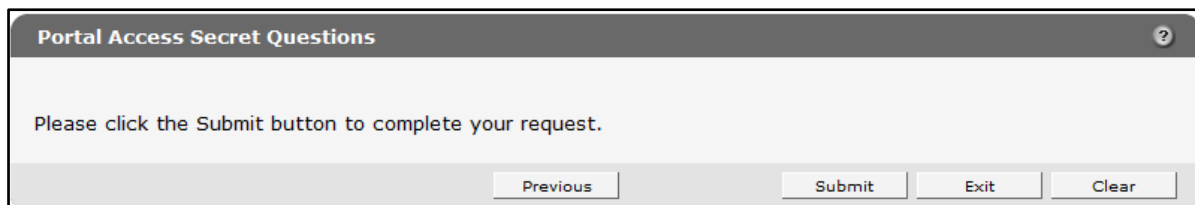


**Figure 42** Portal Access Secret Questions Page

8. Click **Submit**.

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



**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**.
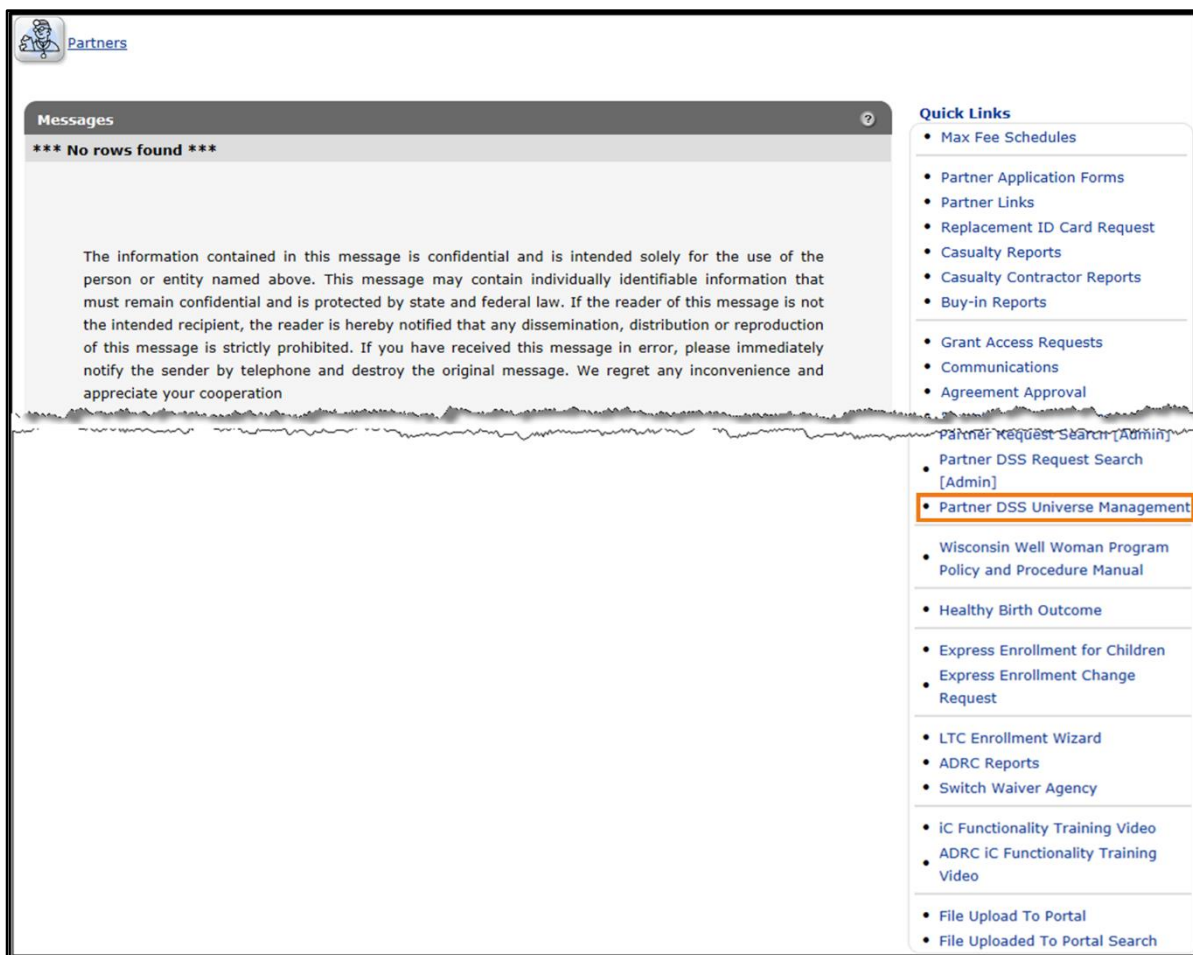


**Figure 44** Partner DSS Universe Management Link

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.
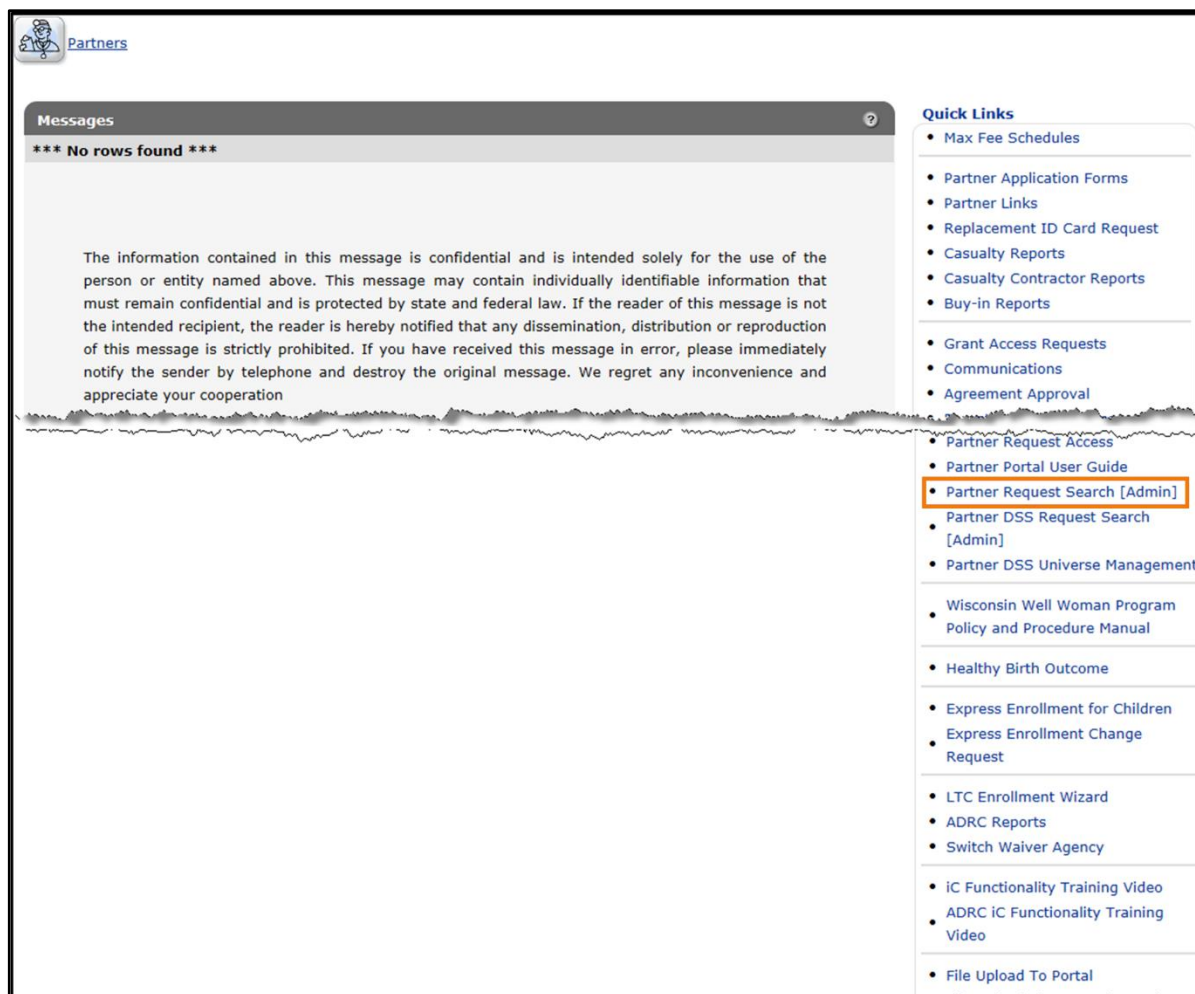


**Figure 48**  Partner Request Search [Admin] Link

The Portal Access User Request Search page will be displayed.



**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.



**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.



**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.
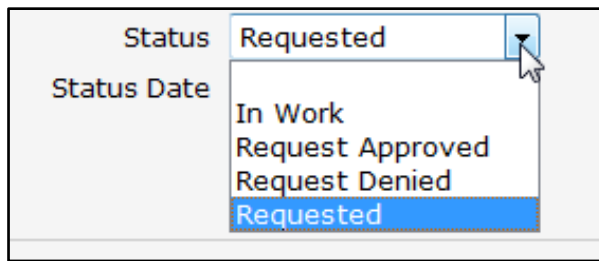


**Figure 52**  Approve or Deny Request

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.



**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.
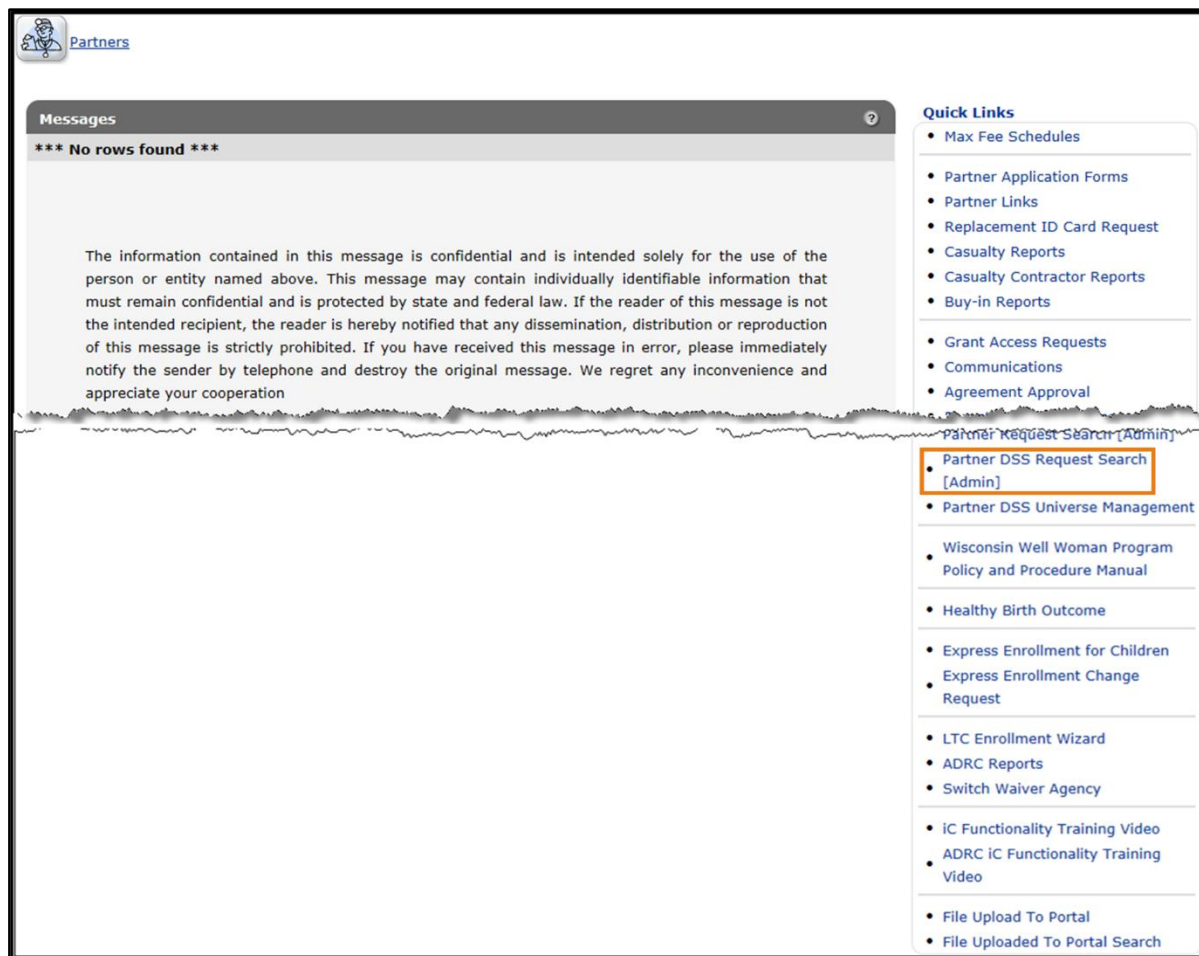


**Figure 56**  Partner DSS Request Search [Admin] Link

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.



**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.
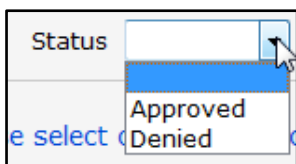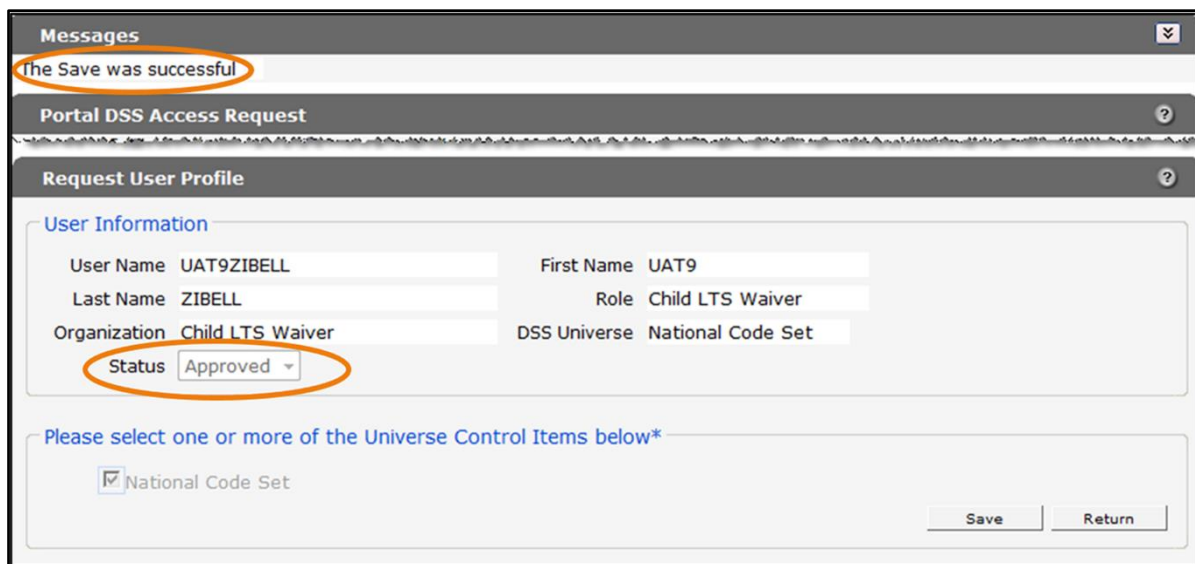


**Figure 60** Approve or Deny Request

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.



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

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.
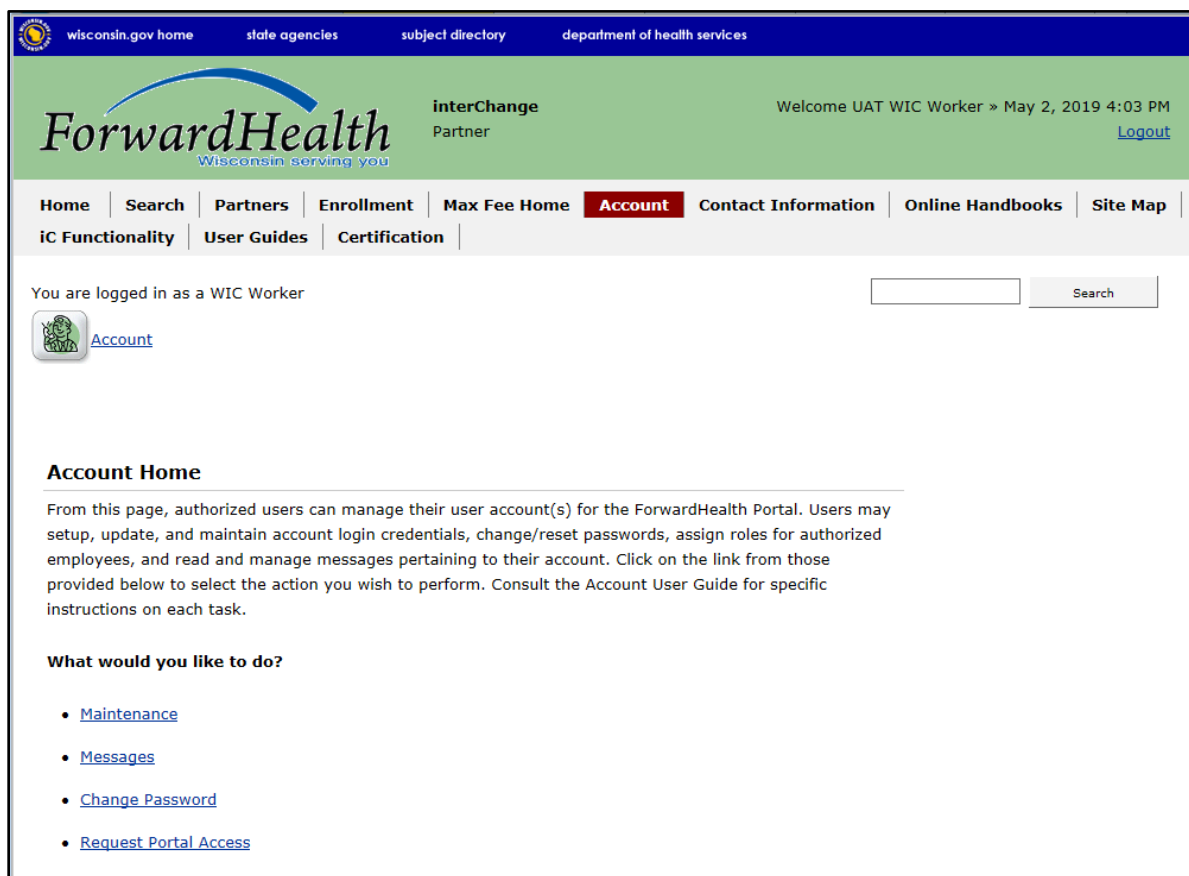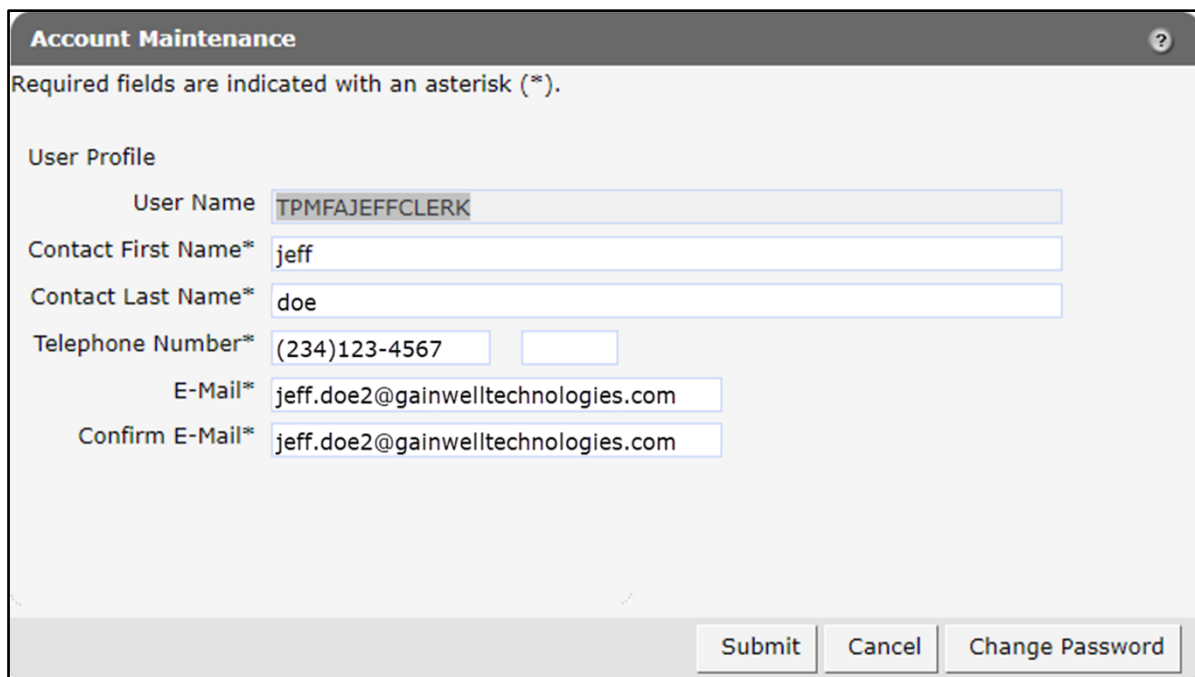


**Figure 62**  Account Homepage

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.
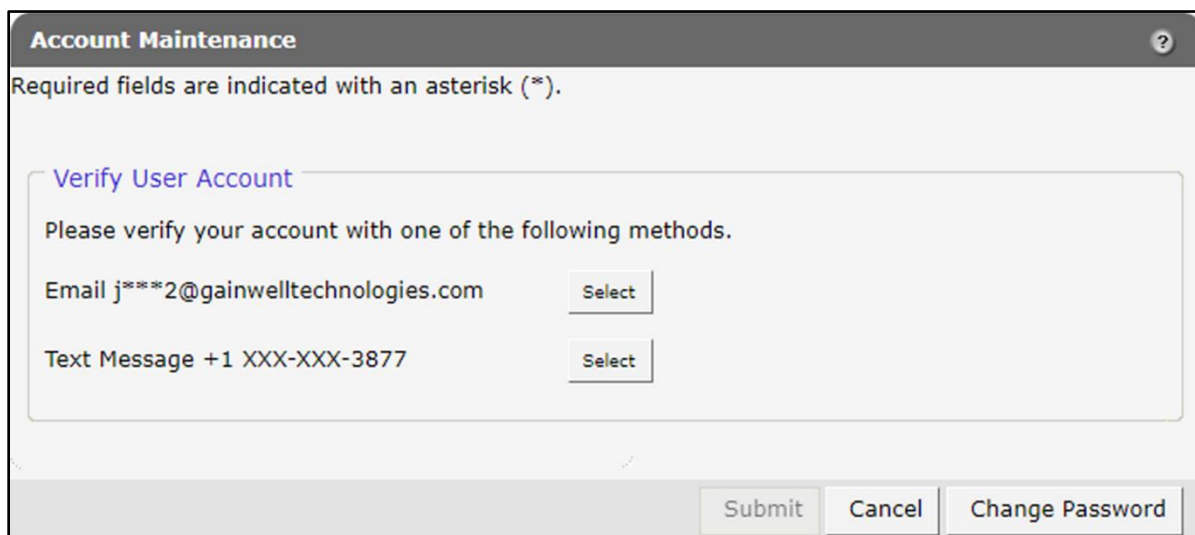
2.  To update your login credentials or contact information, click **Maintenance**. The Account Maintenance panel will be displayed.



**Figure 63**  Account Maintenance Panel

3.  Make applicable changes.

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



**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.



**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.



**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 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.
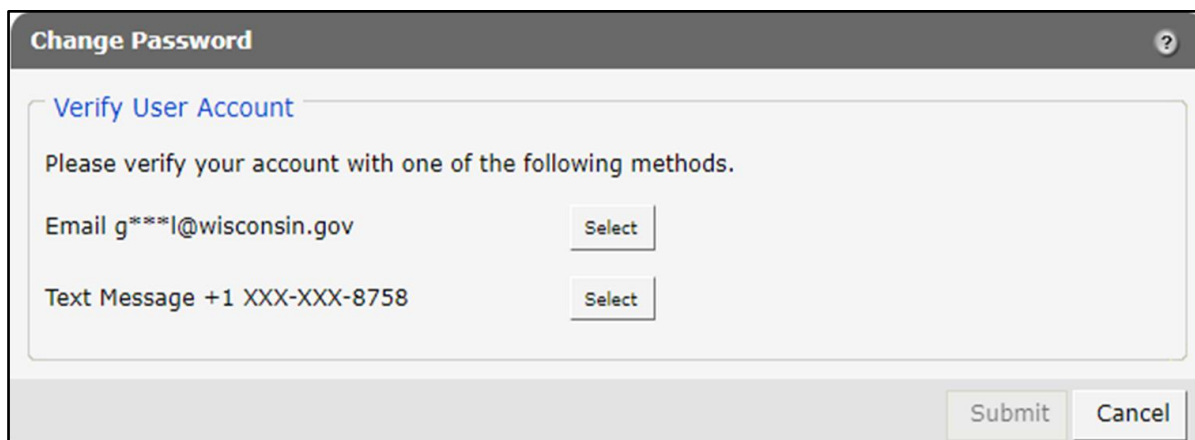


**Figure 69**  Change Password Panel – Verify User Account

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.
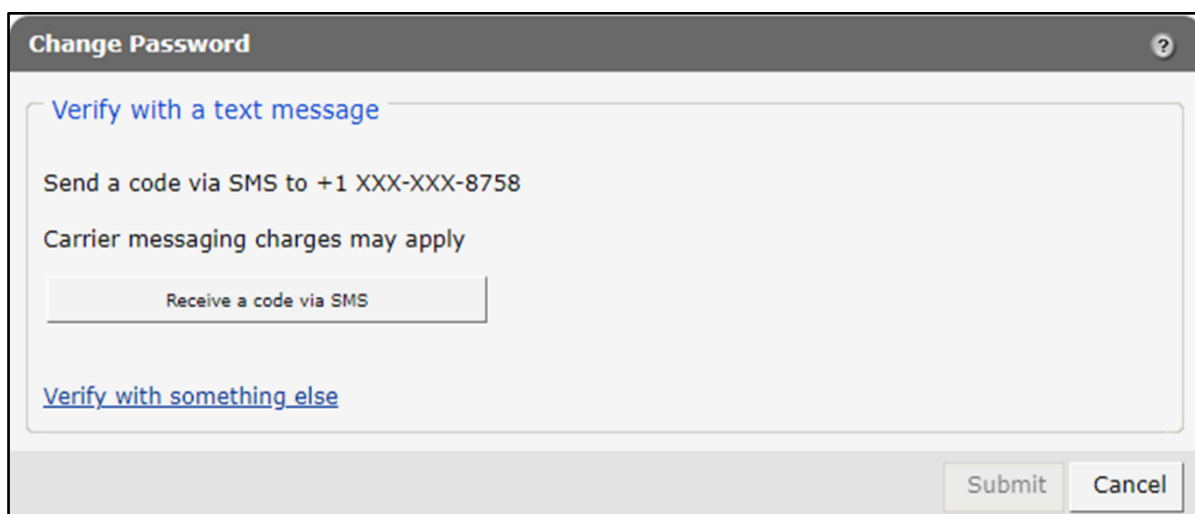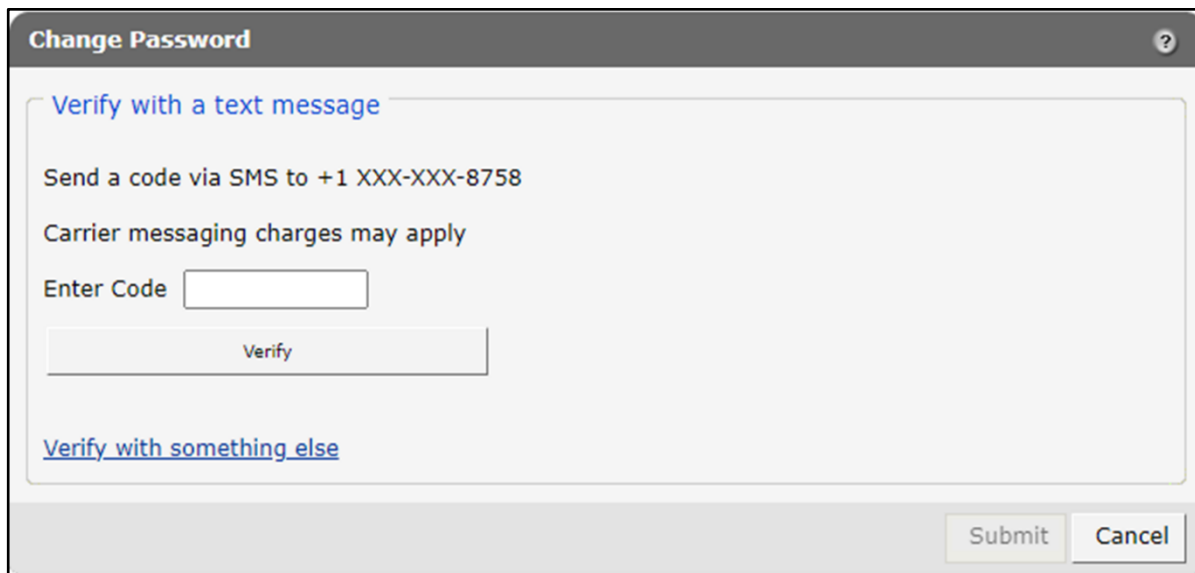


**Figure 70**  Change Password Panel – Email or Text Message Verification

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.



**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.



**Figure 73** Sign In Box

3.  Enter the user's username.

4.  Click **Next**.

A Verify with your password box will be displayed.



**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 **Selec**t 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 .

- 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.



**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.
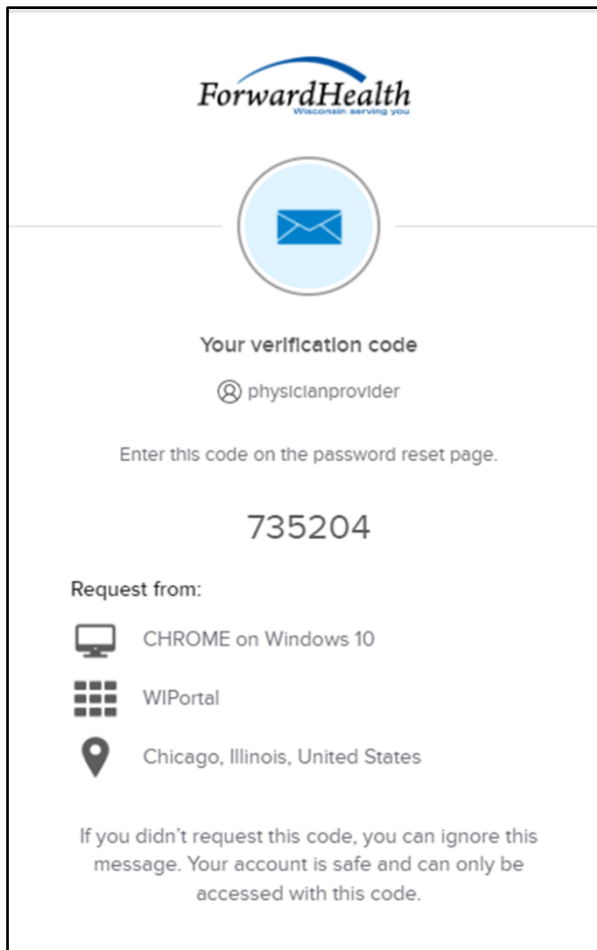


**Figure 83** Verification Code Box

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**.
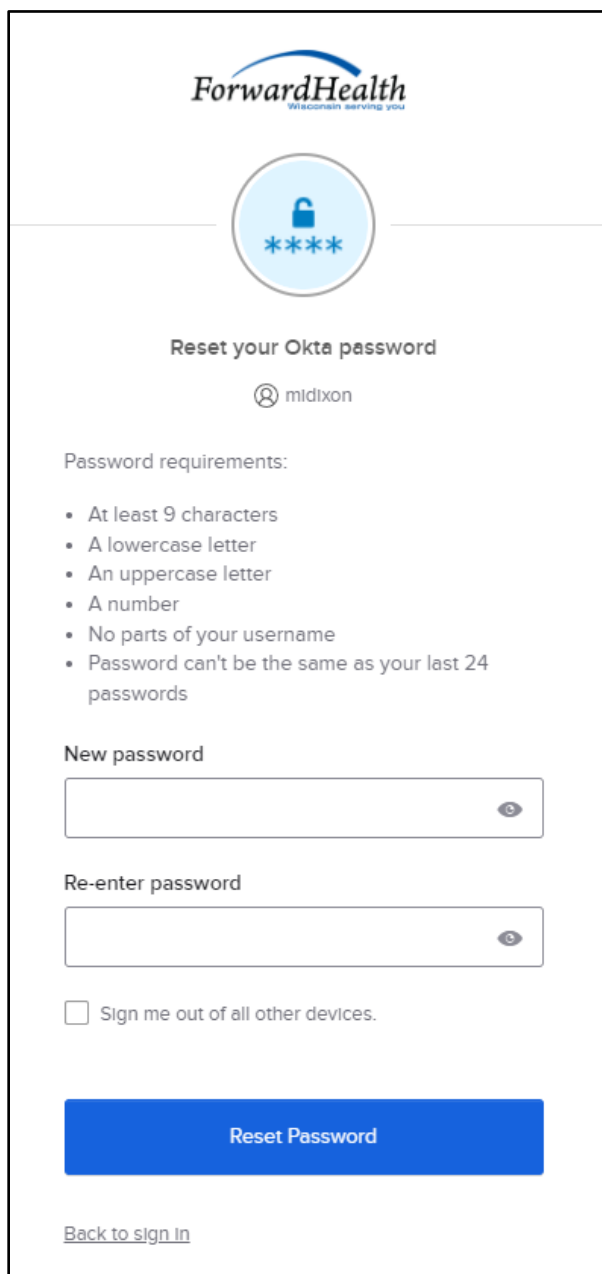


**Figure 84**  Verify With Your Email Box

The Reset your Okta password box will be displayed.



**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.



**Figure 86** Sign In Box

3.  Click **Unlock account?**

An Unlock account box will be displayed.



**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 **Selec**t for email:

    a. A Get a verification email box will be displayed.
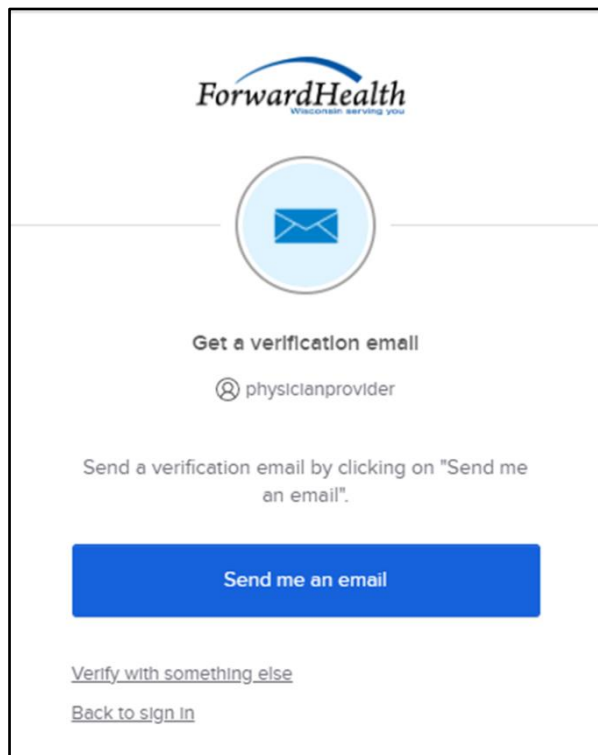


**Figure 88** Get A Verification Email

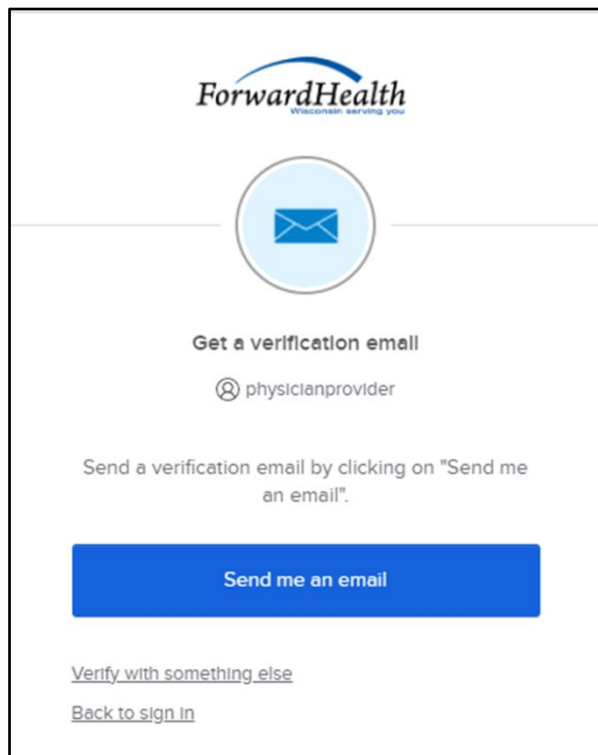    b. Click **Send me an email**. Note: The user also has the option to select **Verify with something else** which will take them back to the Unlock account box or **Back to sign in** which will take them back to the sign in page.

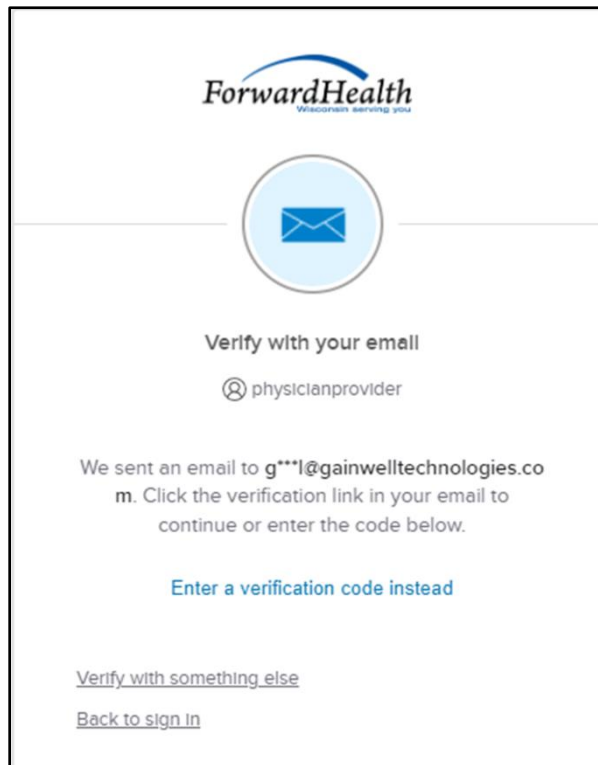A verify with your email box will be displayed and an email will be sent.
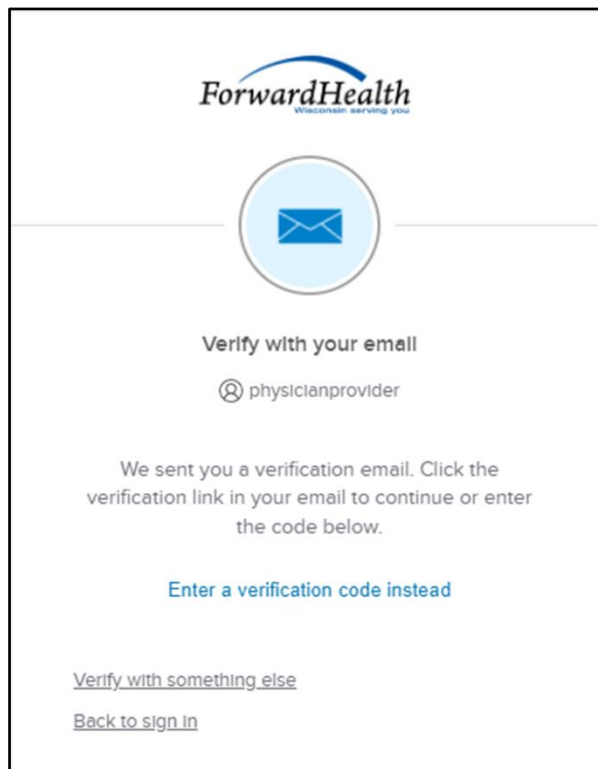


**Figure 89**  Verify with your email box

c.   Proceed to Step 6.

- If the user clicks **Select** for phone:

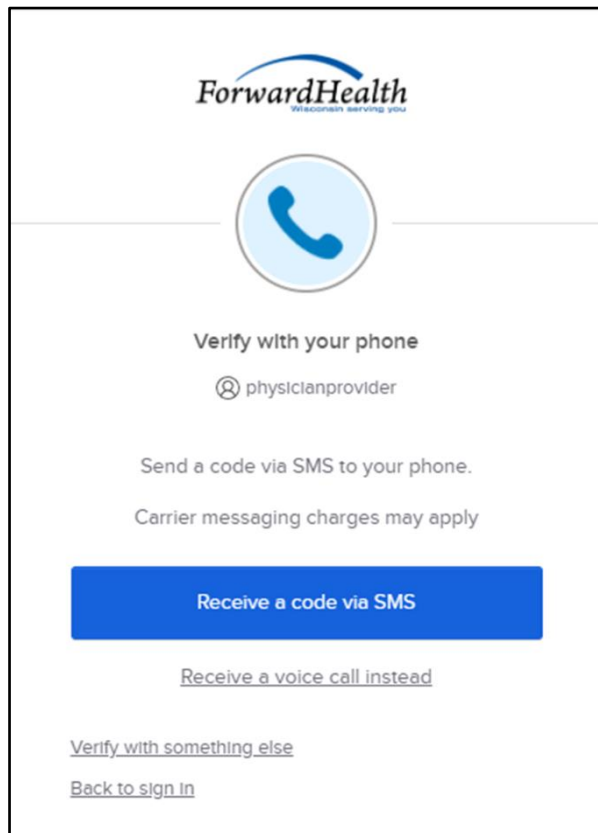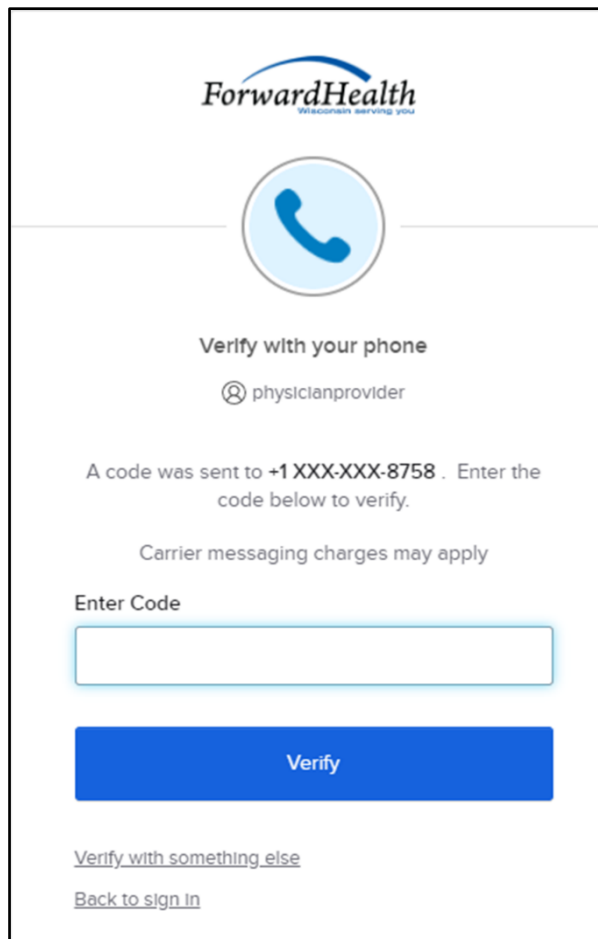  a. A verify with your phone box will be displayed.
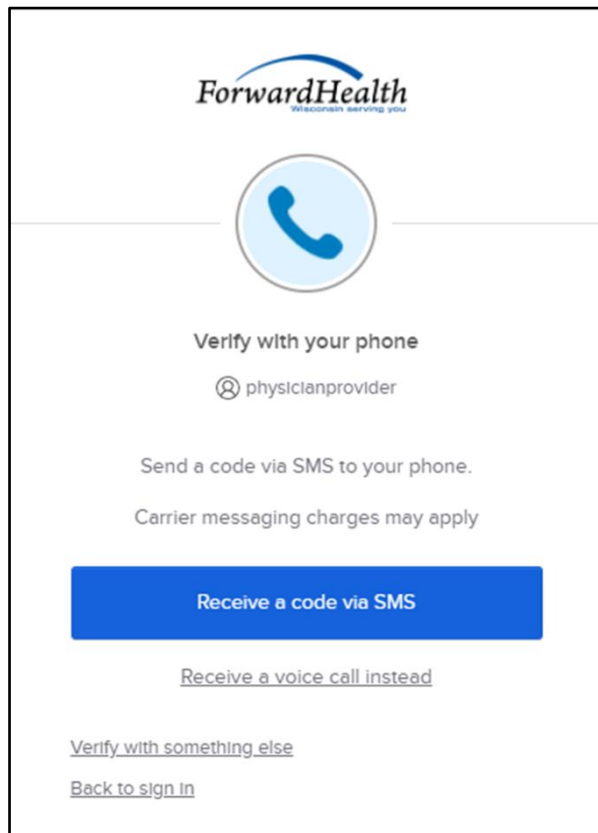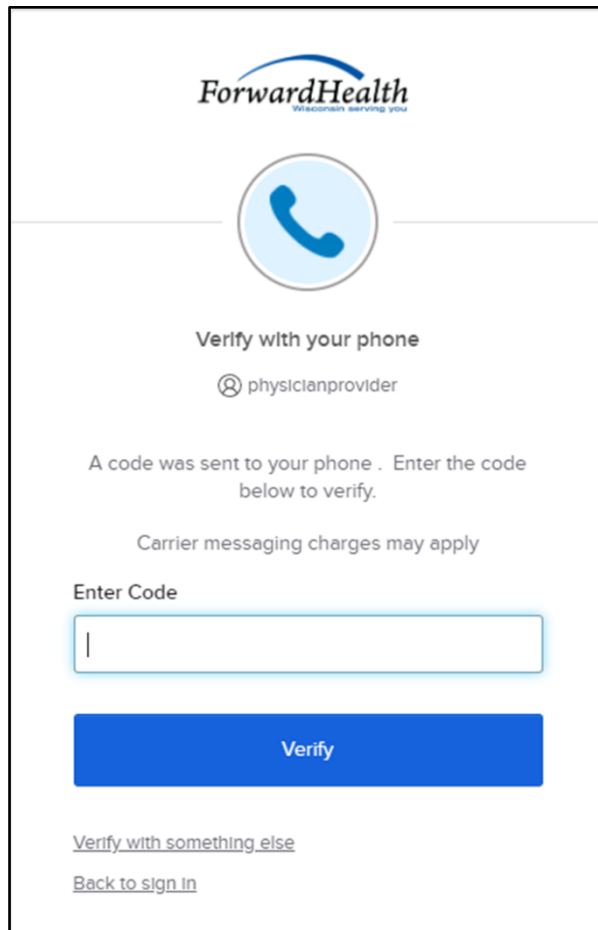


**Figure 90**  Verify With Your Phone Box

  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.



**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.
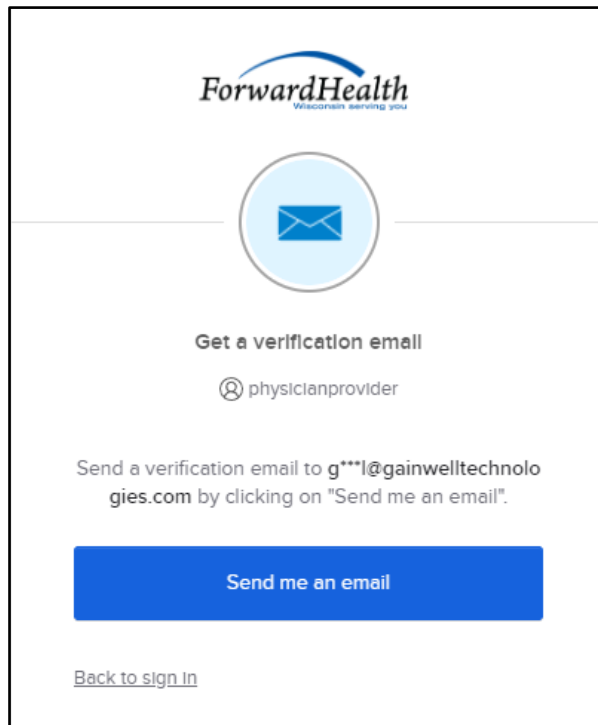


**Figure 92** Get a Verification Email Box
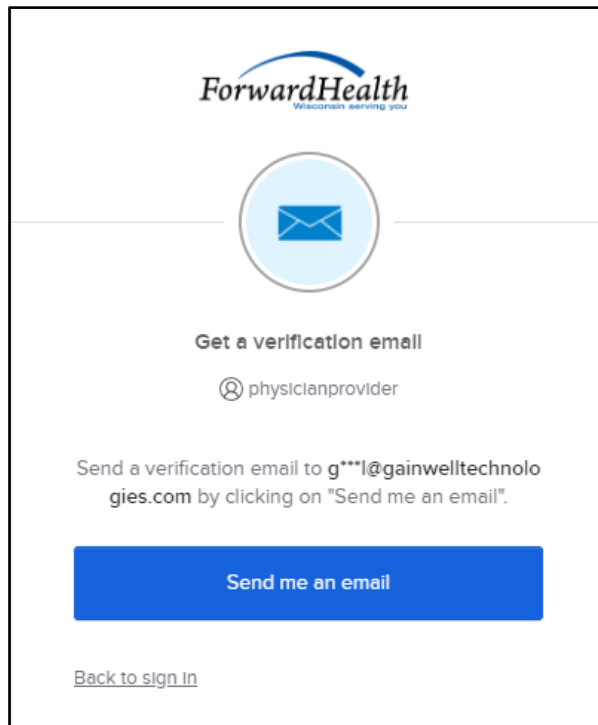
e.   Click **Send me an email**.

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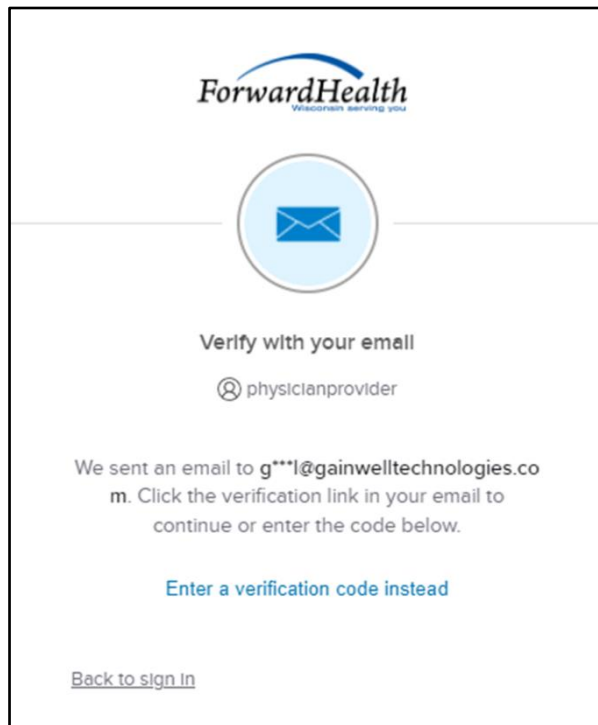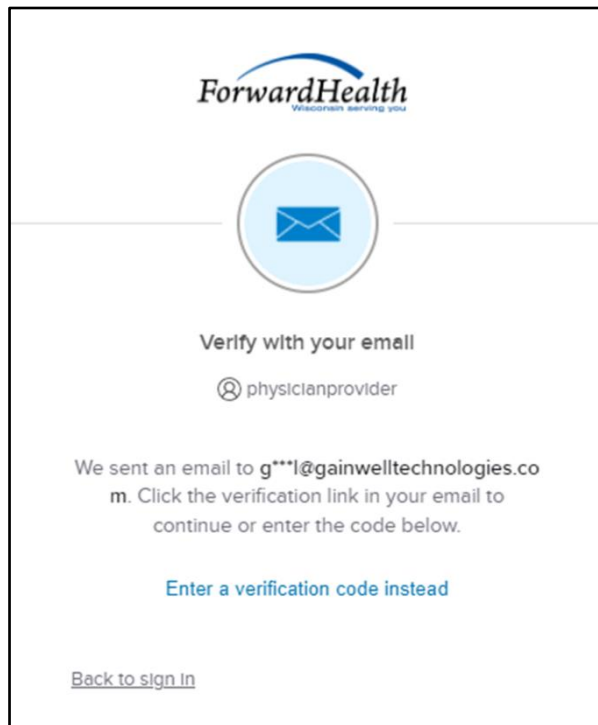


**Figure 93**  Verify With Your Email Box

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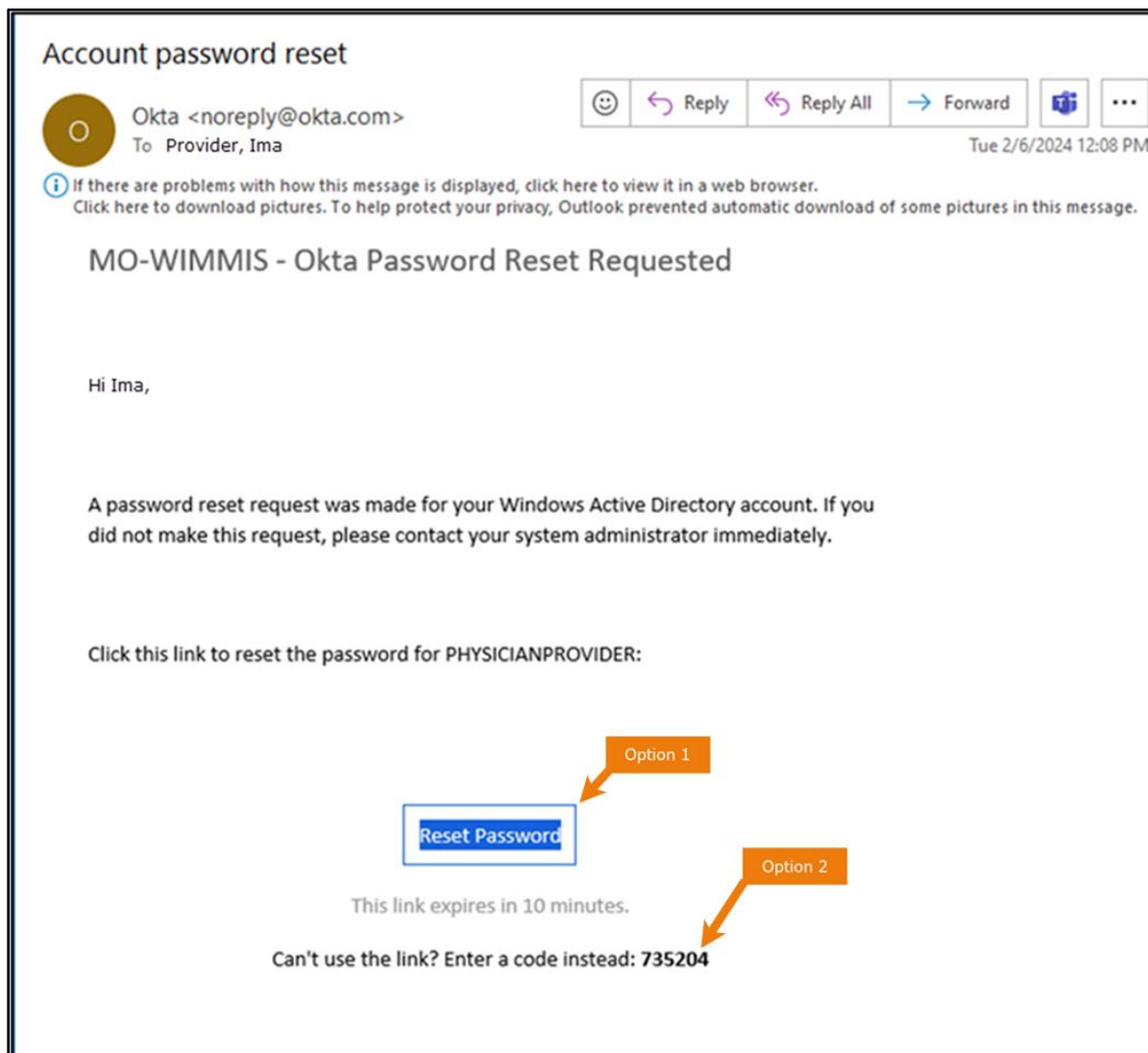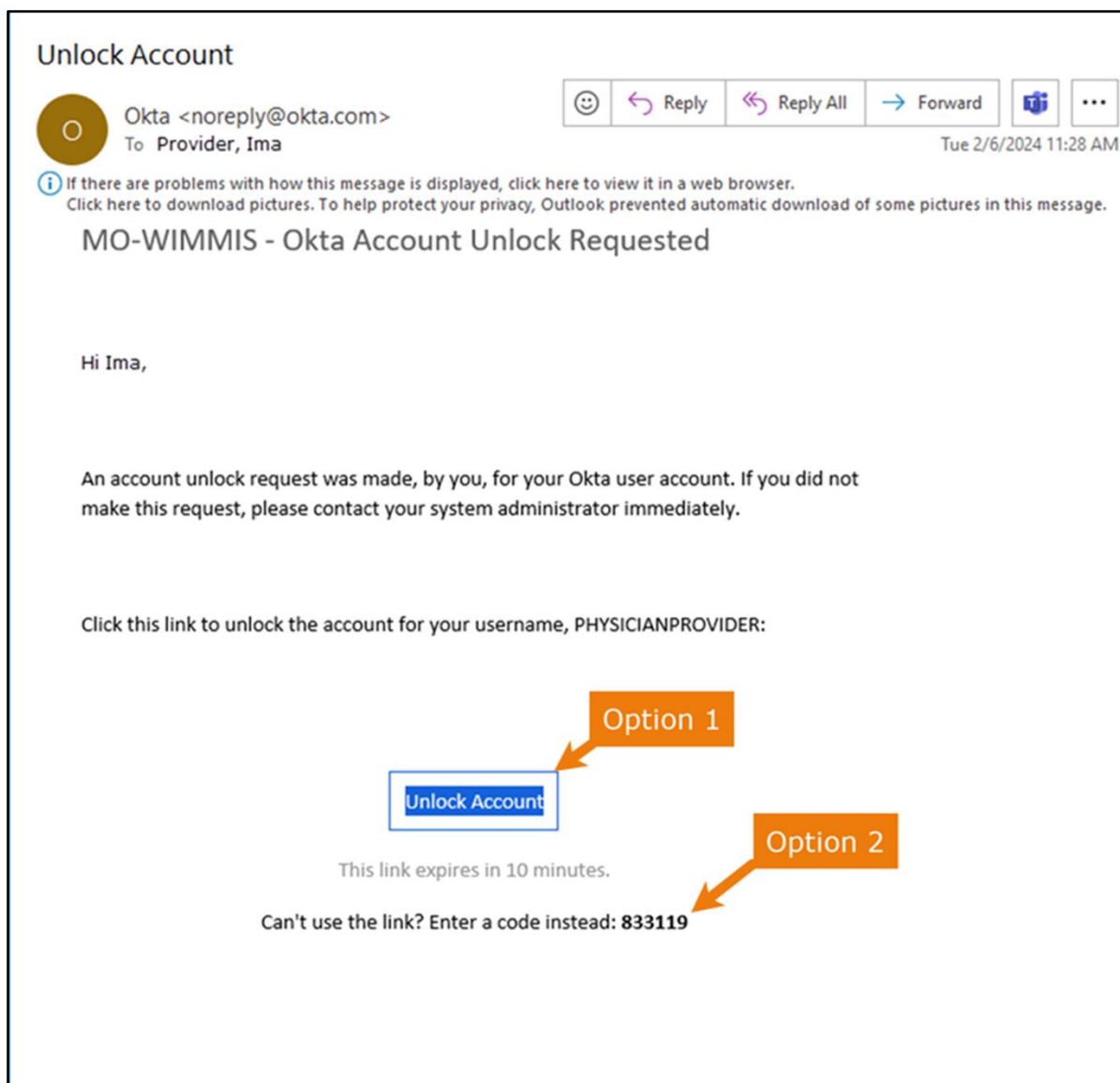


**Figure 94**  One-Time Verification Code Email

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.

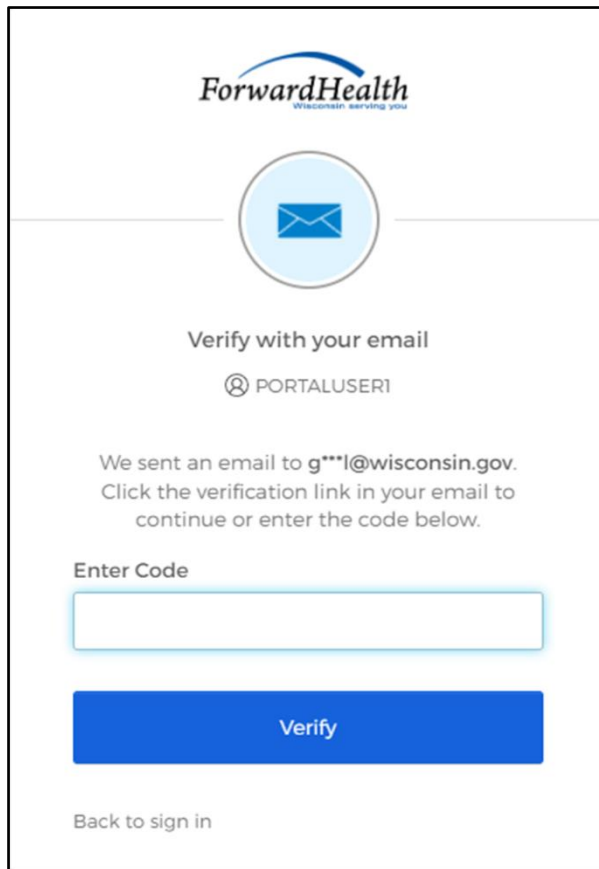- Clicking the **Unlock Account** link from the email will display a verification code box.
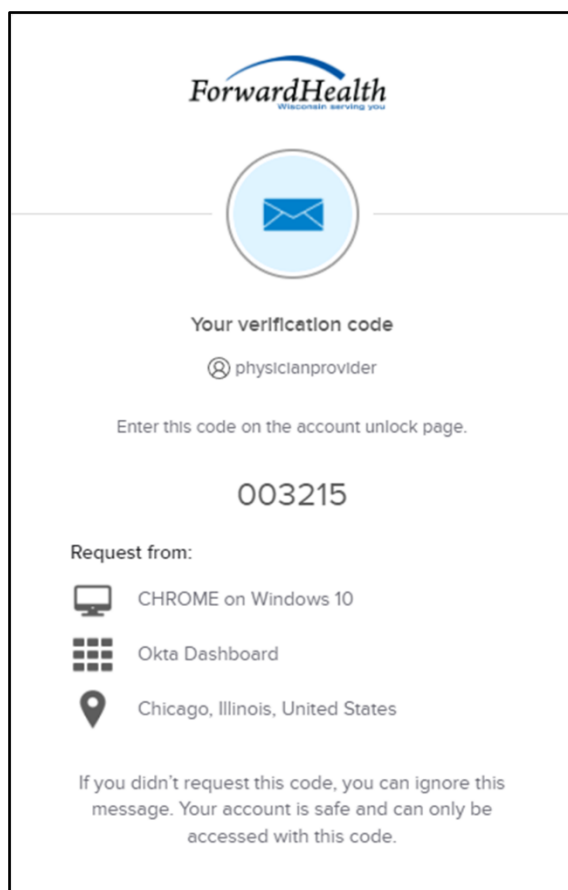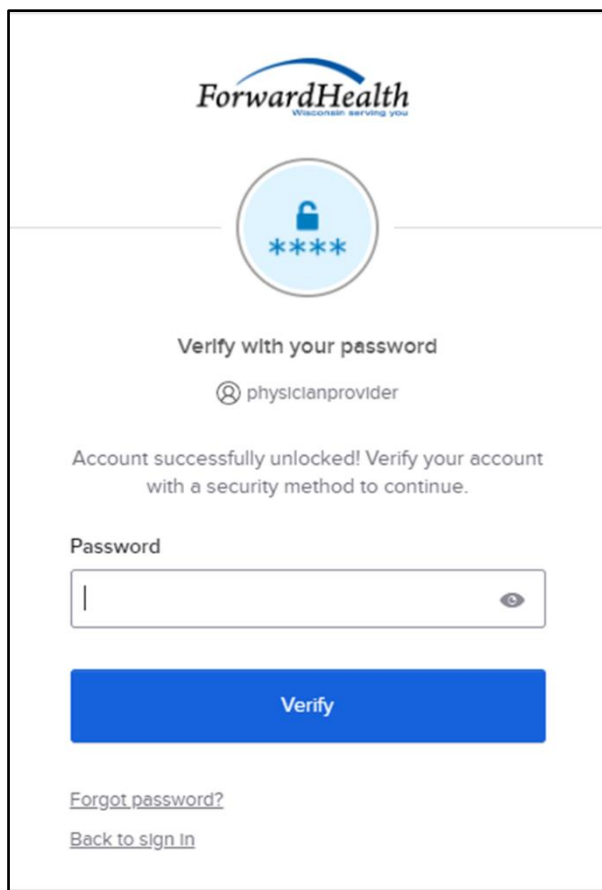


**Figure 95**  Verification Code Box

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.



**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.
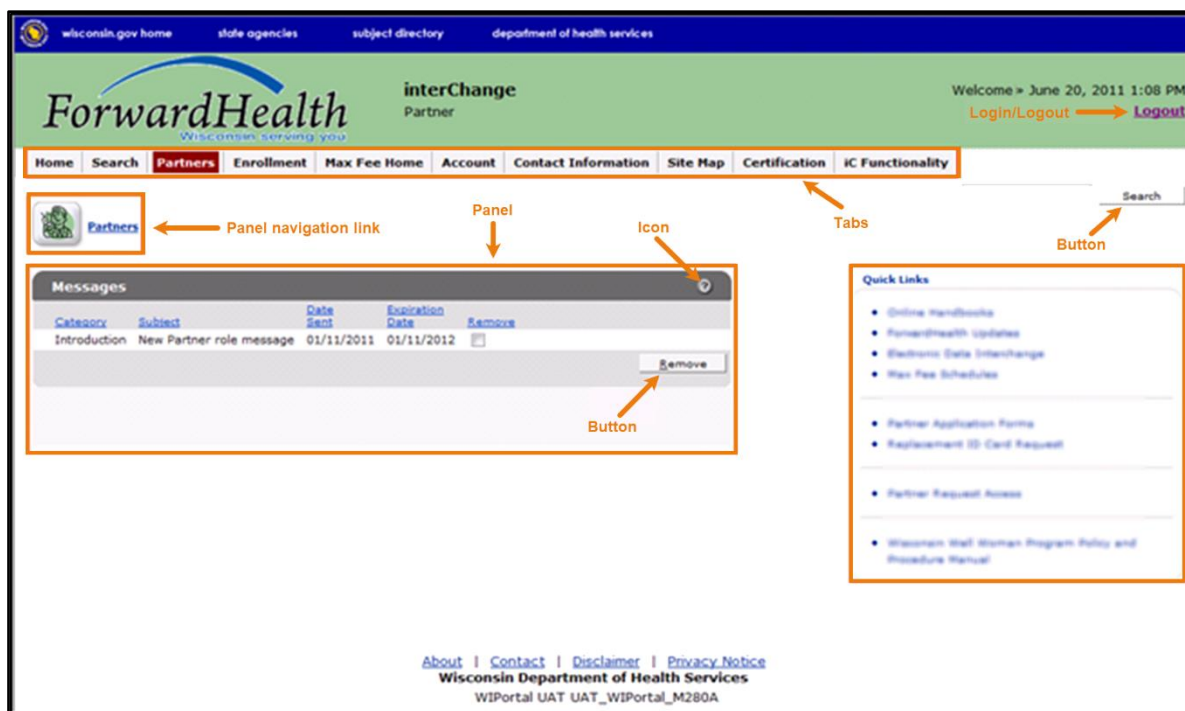


**Figure 97**  Portal Navigation

- 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:*

  o Links at the bottom of the page provide access to contacts and other general information (About, Contact, Disclaimer, Privacy Notice).

  o 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.
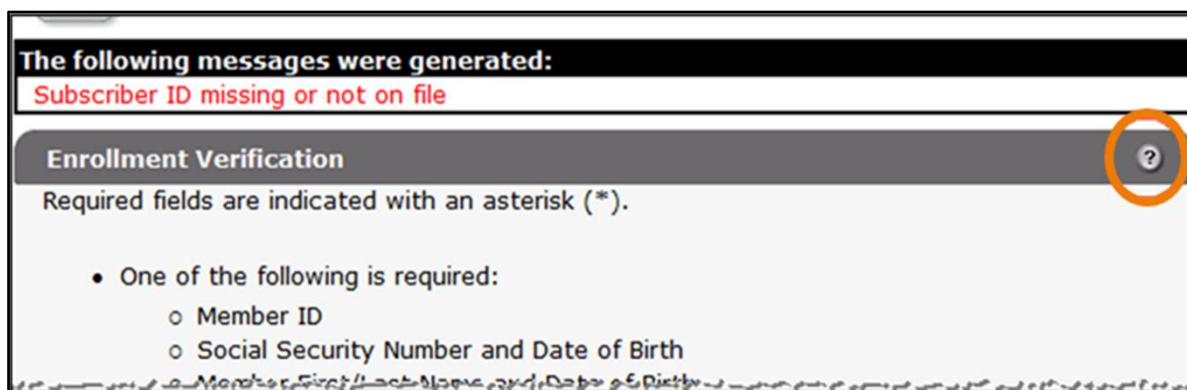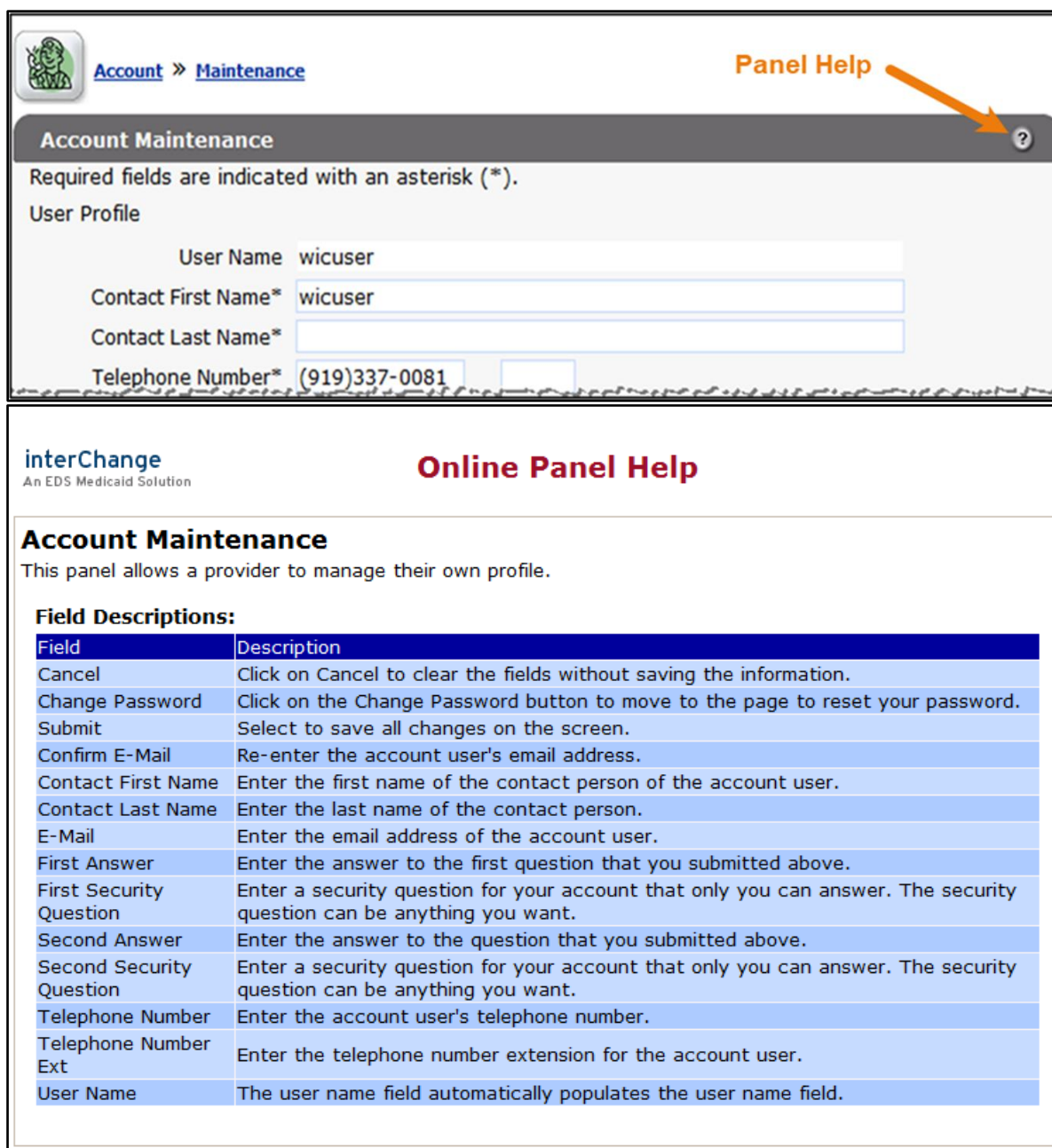


**Figure 98** Sample Error Message

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.



**Figure 100**  Field Help

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



**@neTouch Help**

**PT-Partner Portal Access Request**

**Field Descriptions**

| FieldName | Description |
|---|---|
| First Name | Enter the first name of the requesting partner. |

**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** |
| **Member Services**<br>Correspondents assist members, or persons calling on behalf of members, with questions about the following:<br><br>• Member enrollment.<br>• General program information.<br>• Finding certified providers.<br>• Resolving member concerns.<br>• SeniorCare. | 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). |

| Resources | |
|---|---|
| **Resource** | **Contact Information** |
| **ForwardHealth Provider Services Call Center**<br><br>Correspondents assist providers with questions about the following programs:<br><br>• HDAP.<br>• BadgerCare Plus.<br>• Medicaid.<br>• SeniorCare.<br>• WWWMA.<br>• WCDP.<br>• WWWP.<br>• Wisconsin Medicaid and BadgerCare Plus managed care programs. | 800-947-9627<br><br>Available Monday through Friday, 7:00 a.m.–6:00 p.m. (Central Time, with the exception of state-observed holidays). |
| **ForwardHealth Portal Helpdesk**<br><br>Correspondents assist providers and trading partners with questions about the following:<br><br>• Portal functions and capabilities.<br>• Portal accounts.<br>• Portal registrations.<br>• Portal passwords.<br>• Submissions through the Portal. | 866-908-1363<br><br>Available Monday through Friday, 8:30 a.m.–4:30 p.m. (Central Time, with the exception of state-observed holidays). |
| **Managed Care Ombudsman Program**<br><br>Ombudsmen assist managed care enrollees with questions about the following:<br><br>• Enrollment.<br>• Enrollee rights and responsibilities.<br>• General managed care information. | 800-760-0001<br><br>Available Monday through Friday, 7:00 a.m.–6:00 p.m. (Central Time, with the exception of state-observed holidays). |
| **WiCall Automated Voice Response (AVR) System**<br><br>WiCall is an AVR system that allows providers with touch-tone telephones direct access to enrollment information. | 800-947-3544<br>Press "1" to begin.<br>Available 24 hours a day, seven days a week. |
| **Electronic Data Interchange (EDI) Helpdesk**<br><br>For providers, trading partners, billing services, and clearinghouses with technical questions about the following:<br><br>• Electronic transactions.<br>• Companion documents.<br>• Provider Electronic Solutions (PES). | 866-416-4979<br>Monday through Friday, 8:30 a.m.-4:30 p.m. (Central Time, with the exception of state-observed holidays). |

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

# 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 |

| Special Condition | Description | Aged Threshold | Aged Threshold Period |
|---|---|---|---|
| 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)