

ForwardHealth Portal Demographic Maintenance Tool User Guide

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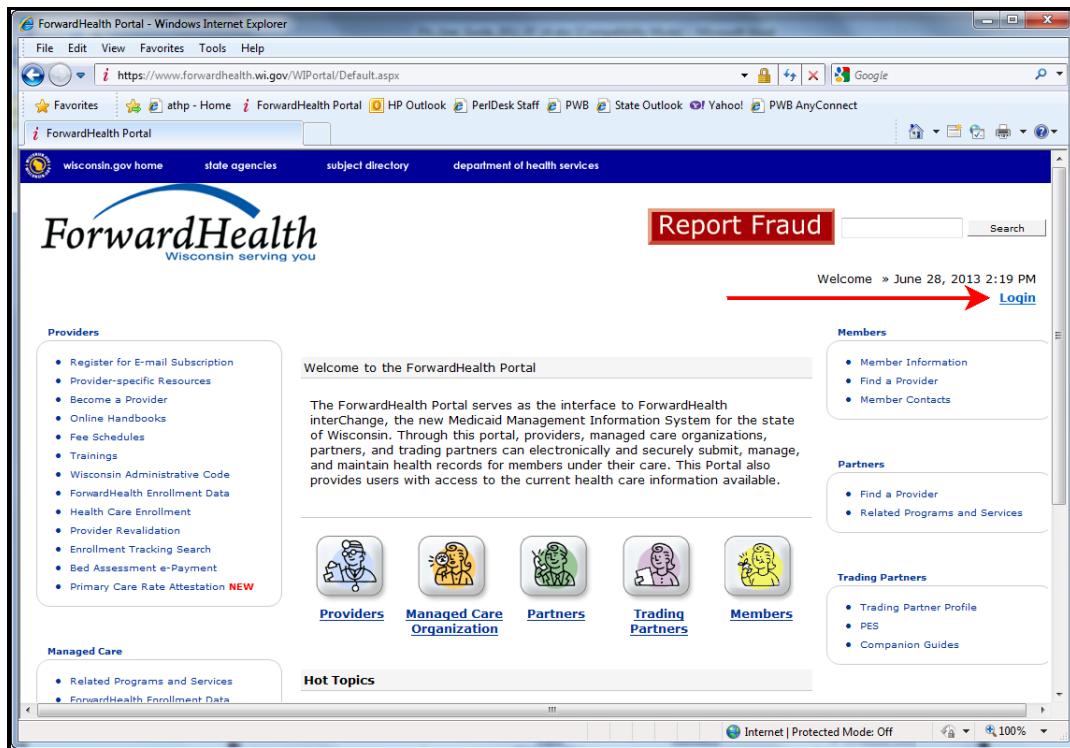
1 Access the Demographic Maintenance Tool

The demographic maintenance tool on the ForwardHealth Portal allows providers to securely, efficiently, and conveniently update provider information, such as addresses and financial information, with fewer data entry mistakes.

When a provider updates information using the demographic maintenance tool, in most cases, ForwardHealth immediately updates the provider's information, which allows for more efficient business practices. Information that cannot be immediately updated is manually verified, which may take additional processing time.

Note: The Demographic Maintenance option is only displayed for administrative accounts or for clerk accounts that have been assigned the Demographic Maintenance role. For information about assigning clerk roles, refer to the ForwardHealth Provider Portal Account User Guide, which is located on the [Portal User Guides page](#) of the ForwardHealth Portal.

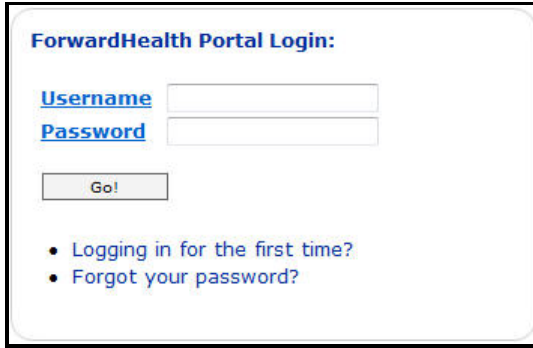
1. Access the ForwardHealth Portal at <https://www.forwardhealth.wi.gov/>.



ForwardHealth Portal Home Page

2. Click **Login**.

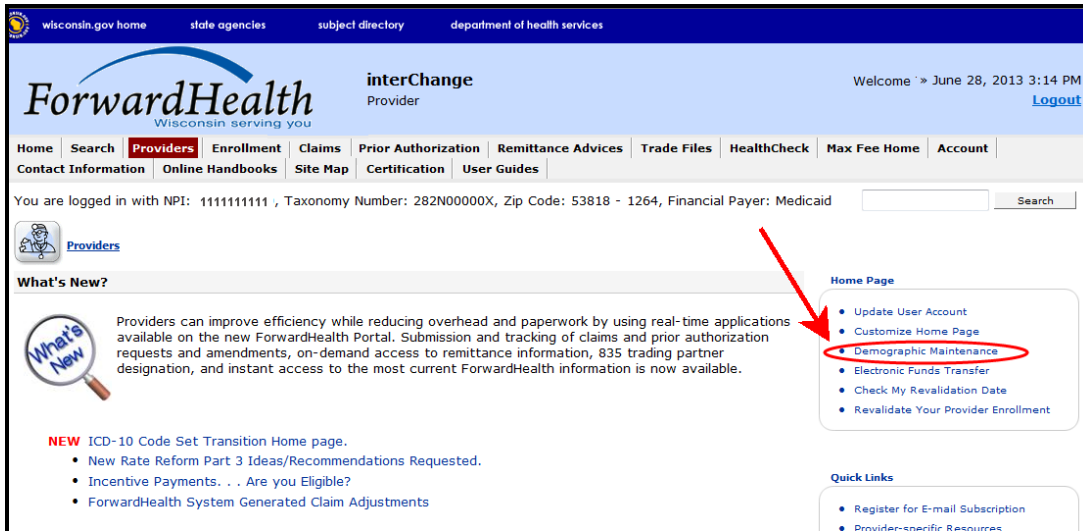
The ForwardHealth Portal Login box will be displayed.



ForwardHealth Portal Login

3. Enter your username.
4. Enter your password.
5. Click **Go!**

The secure Provider page will be displayed.



Secure Provider Page

6. Click **Demographic Maintenance** located in the Home Page box on the right of the secure Provider page.

The Introduction panel will be displayed.

Providers » **Demographic Maintenance**

Alerts

- Do Not Select 'Submit' on each panel. Make applicable changes on all panels and select submit when all changes have been entered. Submitting on each panel may impact processing time for items that require manual review.

Base Information

Name:	Jean Doe	Address:	123 MAIN ST
Provider ID:	1111111111 NPI		MADISON, WI 53713
Taxonomy Code:	208D00000X		(608)000-0000
Provider Type / Specialty:	Physician/Psychiatry		

Notes

- The effective date of a change is the date the change is entered.

[Introduction](#) » [Practice Location Address](#) » [Mailing Address](#) » [Prior Authorization Address](#)
[Financial Information](#) » [Additional Information](#) » [License Information](#) » [Medicare Information](#)
[Taxonomy](#) » [Specialty Change](#) » [Group Member](#) » [Upload Files and Submit](#)

Click a link to navigate to a specific panel.

Introduction

Required fields are indicated with an asterisk (*).

- Select one of the above links to make updates to your information. When all changes are complete, select the "Submit" button to complete the change process.

Click to navigate to the next panel in the demographic maintenance tool.

Introduction Panel

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

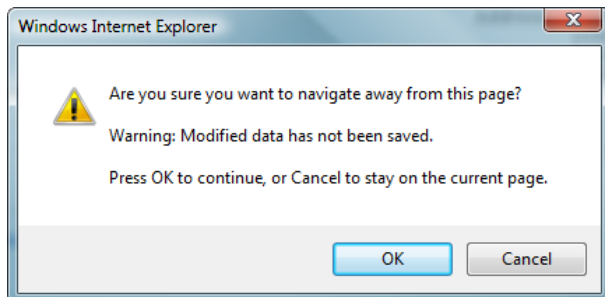
To navigate the demographic maintenance tool, either click the buttons at the bottom of the demographic maintenance tool panels, or click a link above the displayed panel to navigate to a specific panel.

Note: Available panels differ depending on provider type and specialty.

For additional information about what changes should be reported to ForwardHealth, refer to the Keeping Information Current topic (topic #217) in the Ongoing Responsibilities chapter of the Provider Enrollment and Ongoing Responsibilities section of the [ForwardHealth Online Handbook](#).

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

Note: If the user tries to navigate away from the Demographic Maintenance Tool before submitting their information, a dialog box will be displayed.



Dialog Box

To return to the demographic maintenance tool to submit the modified information, click **Cancel**.

To continue *without* submitting the modified information, click **OK**.

2 Practice Location Address Panel

On the Practice Location Address panel, users may update the contact information for the provider's location. Some users may also be able to update additional addresses. With limited exceptions, the practice location and telephone number for member's use are published in a provider directory made available to the public.

1. Click **Practice Location Address** from the navigation links above the current panel.

The Practice Location Address will be displayed.

Practice Location Address ?

Required fields are indicated with an asterisk (*).

- Practice location is the street address where a provider office is physically located and where the records are normally kept.
- A provider directory search will be made available to the public. The address and telephone for member use will be included in a provider directory for BadgerCare Plus, Medicaid and WCDP providers (does not apply to WWWP).
- Contact Person and Telephone Number for Contact Person will be used for administrative purposes only.

Street Address Line 1* 123 MAIN ST

Street Address Line 2

City* MADISON

State/ZIP WI 53713 - 1234

County Dane

Contact Person* JANE DOE

Telephone Number - Contact Person* (608)000-0000 Ext.

Telephone Number - Member Use* (608)111-1111

Previous Next Exit

Practice Location Address Panel

2. Delete the information that needs to be changed and enter new information.

Any changes to the practice location on file with ForwardHealth may alter the ZIP+4 code information required on transactions. Users should verify the ZIP+4 code for the address on the [U.S. Postal Service Web site](#).

3. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

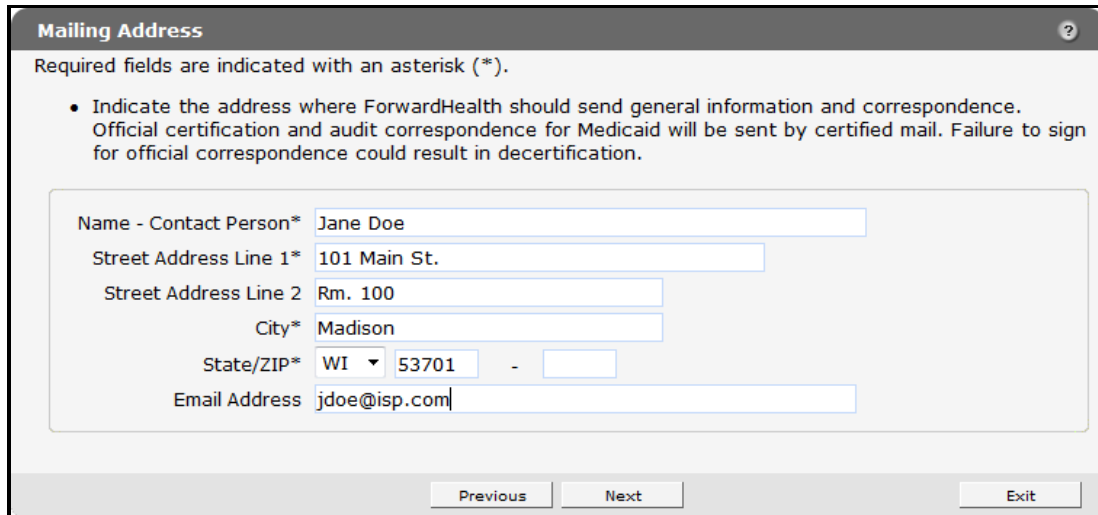
If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

3 Mailing Address Panel

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

1. Click **Mailing Address** from the navigation links above the current panel.

The Mailing Address will be displayed.



Mailing Address ?

Required fields are indicated with an asterisk (*).

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

Name - Contact Person* Jane Doe

Street Address Line 1* 101 Main St.

Street Address Line 2 Rm. 100

City* Madison

State/ZIP* WI 53701 -

Email Address jdoe@isp.com

Previous Next Exit

Mailing Address Panel

2. Delete the information that needs to be changed and enter new information.
3. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

4 Prior Authorization Address Panel

On the Prior Authorization Address panel, users may update the address where ForwardHealth should send prior authorization information.

1. Click **Prior Authorization** from the navigation links above the current panel.

The Prior Authorization Address panel will be displayed.

Prior Authorization Address

Required fields are indicated with an asterisk (*).

- Indicate the address where ForwardHealth should send prior authorization information.

Name - Contact Person* PA CONTACT

Street Address Line 1* 123 MAIN ST.

Street Address Line 2

City* MADISON

State/ZIP* WI 53710 - 1234

Fax Number (123)456-7890

Telephone Number - Contact Person (987)654-3210 Ext.

Previous Next Exit

Prior Authorization Address Panel

2. Delete the information that needs to be changed and enter new information.
3. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

5 Financial Information Panel

The Financial Information panel is used to update the provider's tax information.

1. Click **Financial Information** from the navigation links above the current panel.

The Financial Information panel will be displayed.

The screenshot shows the 'Financial Information' panel with a title bar and a help icon. Below the title bar, a note states: 'Required fields are indicated with an asterisk (*).' The panel is divided into three main sections:

- Tax Information:** Contains fields for 'Taxpayer Identification Number (TIN)*' (123456789), 'Name' (TIN NAME), and 'TIN Type*' with radio buttons for 'EIN' (selected) and 'SSN'.
- Checks and Remittance Advice Address:** Includes a sub-header and a note: 'Indicate the address where checks and remittance advice information should be sent.' Fields include 'Street Address Line 1*' (123 MAIN ST.), 'Street Address Line 2', 'City*' (MADISON), 'State/ZIP*' (WI, 53713, 1234), 'Name - Financial Contact Person' (JOHN SMITH), and 'Telephone Number - Contact Person' ((123)456-7890).
- 1099 Mailing Address:** Includes a sub-header and a note: 'Wisconsin Medicaid generates and sends one IRS Form 1099 per TIN. It is recommended that you verify this address with the person in your organization who receives IRS Form 1099'. Fields include 'Address' (123 MAIN ST), 'City' (MADISON), and 'State/ZIP' (WI, 53711, 1234).

At the bottom of the panel are three buttons: 'Previous', 'Next', and 'Exit'.

Financial Information Panel

2. Delete the information that needs to be changed and enter new information.

The Financial Information panel contains three sections:

- **Tax Information:**
 - For an organization:
 - If the organization's Tax Identification Number (TIN) is on file with ForwardHealth, the TIN Name field will be available for editing.
 - If the TIN is not on file, the TIN Name field is required.
 - For an individual:
 - If the TIN is a Social Security number (type SSN) on file with ForwardHealth, the TIN Name field will be available for editing.

- If the TIN is a Federal Employer Identification Number (type FEIN) on file with ForwardHealth, the TIN Name field will not be available for editing.
- If the TIN is not on file with ForwardHealth, the TIN Name field will be required.

If the TIN number on the Financial Information panel is changed and the user clicks **Next** or a link to go to another panel, the page will refresh and the "Reason for Tax ID Change" section will be displayed at the bottom of the panel. Refer to [Section 5.1 Reason for Tax ID Change](#) of this guide for more information.

- *Checks and Remittance Advice Address* — Contains the address and contact information where ForwardHealth should send checks and Remittance Advices.
- *1099 Mailing Address* — contains the address where ForwardHealth generates and sends IRS Form 1099 for the indicated TIN.
 - Organizations:
 - If the TIN is on file with ForwardHealth, this section will be available for editing.
 - If the TIN is not on file with ForwardHealth, providers are required to enter an address.
 - Organizations who recently changed their TINs:
 - If the TIN is on file with ForwardHealth, this section will be available for editing.
 - If the TIN is not on file with ForwardHealth, providers are required to enter an address.
 - Individuals:
 - If the TIN is an SSN on file with ForwardHealth, this section will be available for editing.
 - If the TIN is an FEIN on file with ForwardHealth, the TIN Name section will not be available for editing.
 - Individuals who recently changed their TINs:
 - If the TIN is an SSN on file with ForwardHealth, providers will be able to edit the address information in this section.
 - If the TIN is an FEIN on file with ForwardHealth, this section will not be available for editing.
 - If the TIN is not on file with ForwardHealth, the 1099 field will be required.

3. When finished entering information, one of three options may be chosen:

- Click **Next** to go to the next panel on the list.
- Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
- Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

5.1 Reason for Tax ID Change Section

If the TIN number on the Financial Information panel is changed and the user clicks **Next** or a link to go to another panel, the page will refresh and the Reason for Tax ID Change section will be displayed at the bottom of the panel.



The screenshot shows a web form with the following elements:

- Address Line 2: [Empty text box]
- City: MADISON
- State/ZIP: WI 53705 - 1200
- Section Header: Reason for Tax ID Change
- Question: Was the TIN changed because of a change in ownership for your organization?
- Radio buttons: Yes (selected), No
- Text field: Change in Ownership Effective Date 11/11/2013
- Navigation buttons: Previous, Next, Exit

Reason for Tax ID Change Section (Financial Information Panel)

Organizations that change the TIN number on the Financial Information panel are required to enter information on this panel.

6 Additional Information Panel

On the Additional Information panel, users may identify which languages are spoken by the staff at the provider's practice or clinic and enter their Drug Enforcement Administration (DEA) number(s) if they have any.

1. Click **Additional Information** from the navigation links above the current panel. The Additional Information panel will be displayed.

The screenshot shows the 'Additional Information' panel with a title bar and a help icon. Below the title bar, it states 'Required fields are indicated with an asterisk (*).' The panel is divided into three main sections: 'Languages', 'Language Detail', and 'DEA Information'. The 'Languages' section contains a table with columns for Language, Description, Effective Date, and End Date. The 'Language Detail' section has a dropdown menu for 'Language*', text boxes for 'Effective Date' and 'End Date', and a checkbox for 'No Longer Applies'. The 'DEA Information' section has radio buttons for 'Yes' and 'No' for 'Do you have a Drug Enforcement Administration (DEA) Number?*' and text boxes for 'DEA Numbers'. At the bottom, there are 'Add', 'Cancel', 'Previous', 'Next', and 'Exit' buttons.

Language	Description	Effective Date	End Date
ENG	ENGLISH	10/02/2013	12/31/2299
SPA	SPANISH	10/02/2013	10/31/2013
FRE	FRENCH	10/02/2013	10/07/2013
SCR	SERBO-CROATIAN	10/02/2013	10/07/2013
HMN	HMONG	10/31/2013	12/31/2299

Additional Information Panel

6.1 Add a Language

To add a language, complete the following steps:

1. Select the applicable language from the Language drop-down menu in the "Language Detail" section.
The Effective Date and End Date fields are read-only. These fields will be populated with information after the row is added.
2. Click **Add**.
The language will be added to the list at the top of the panel. The start date will be the current date, and the end date will be 12/31/2299.
3. Click **Save**.
The selected language information will be saved. Complete the above steps to enter additional languages.

4. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

6.2 End Date a Language

To end date a language, complete the following steps:

1. Click the row for the language to end date in the “Languages” section.
The selected information will populate the fields on the panel.
2. Check the **No Longer Applies** box under the “Language Detail” section.

The screenshot shows a web interface titled "Additional Information" with a help icon. Below the title, it states "Required fields are indicated with an asterisk (*)".

The "Languages" section contains a table with the following data:

Language	Description	Effective Date	End Date
ENG	ENGLISH	10/02/2013	12/31/2299
SPA	SPANISH	10/02/2013	10/31/2013
FRE	FRENCH	10/02/2013	10/07/2013
SCR	SERBO-CROATIAN	10/02/2013	10/07/2013
HMN	HMONG	10/31/2013	12/31/2299

Below the table, it says "Type data below for new record." The "Language Detail" section includes:

- Language*: FRENCH (dropdown menu)
- Effective Date: 10/02/2013 (text input)
- End Date: 10/07/2013 (text input)
- No Longer Applies
- Save button (highlighted with a red box)

End Date Language

3. Click **Save**.

The selected language information will be saved, and the fields will become blank. The language information will remain on the list at the top of the panel; however, the current date will be displayed as the end date. Complete the above steps to end date any additional languages.

4. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

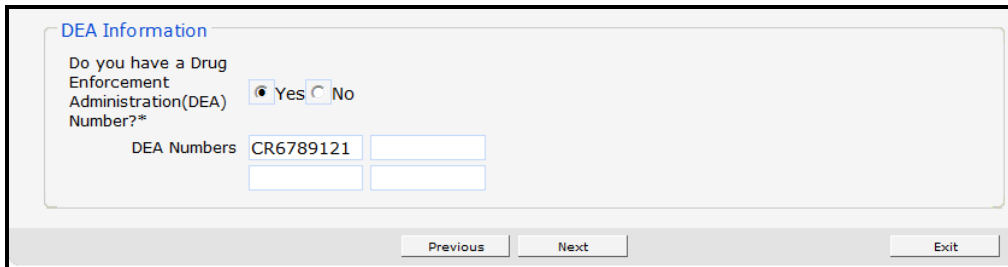
Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

When leaving the page, if there is a problem with the information entered an error message will be displayed at the top of the panel. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

6.3 Add Drug Enforcement Administration Information

To add DEA information, complete the following steps:

1. Click the **Yes** radio button in the “DEA Information” section to indicate you have a DEA number.
2. Enter one or more DEA numbers in the DEA Numbers field.



DEA Information Section

3. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

7 License Information Panel

On the License Information panel, providers can report their licensure information, including license number, grant and expiration dates, and physical location as applicable (e.g., hospital providers).

1. Click **License Information** from the navigation links above the current panel.
The License Information panel will be displayed.

License Number	License State	License Effective Date	License End Date	License Type
48898	WI	09/16/1968	02/28/2014	Regular

License Information Panel

The License Information panel displays current and expired licensure information that providers have on file with ForwardHealth. Providers can use this panel to add or update their licensure information. Providers should only add licenses that are applicable to their ForwardHealth enrollment.

Providers may have a maximum of five active licenses applicable to the provider's type of enrollment. All license effective dates and end dates will be verified through applicable state licensing boards prior to being added to the provider's file. If the provided dates do not correspond with the dates given by the applicable state licensing board, the dates given by the state licensing board will be retained and will be displayed.

7.1 Update a License

Providers will only be able to update the effective and end dates of current licenses.

1. Click the row for the license you wish to update from the "License Information List" section.

The panel will refresh and the fields on the panel will populate with the information for the selected license.

License Number	License State	License Effective Date	License End Date	License Type
48898	WI	09/16/1968	02/28/2014	Regular

Type changes below.

License Information

License Number: 48898
Issuing State: WI
License Effective Date*: 09/16/1968
License End Date*: 02/28/2014
License Type: Regular Temporary

Save Cancel

Previous Next Exit

License Information Section with Populated License Information

2. Enter the new date or dates in the *License Effective Date* field and/or the *License End Date* field.
3. Click **Save**.
4. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

7.2 Add a License

1. Enter licensure information in all the fields in the "License Information List" section. All fields must be completed in order to save the new license information.
2. Click **Add**.

If the information can be verified by ForwardHealth, a new row will be added to the License Information List.

If the information cannot be verified, an error message will be displayed at the top of the panel and a check box will be displayed asking for the user to validate the information entered.

The following messages were generated:
Wisconsin license number can not be verified, verify the data entered is correct then continue with the recertification process.

License Information

Required fields are indicated with an asterisk (*).

- Only add licenses which are applicable to your Forwardhealth Enrollment.
- You are allowed to enter up to five active licenses.

License Information List

License Number	License State	License Effective Date	License End Date	License Type
4417	WI	06/20/2011	09/30/2014	Regular
136267	WI	08/25/2000	02/29/2016	Regular

Type changes below.

License Information

License Number* 4417
Issuing State* WI
License Effective Date* 06/20/2011
License End Date* 09/30/2014
License Type* Regular Temporary

License number is correct and valid.

Add Cancel

Previous Next Exit

New License Information Not Validated by ForwardHealth

3. If the information is correct, check the box next to *License number is correct and valid* and click **Add**.
4. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered. Some providers (e.g., out-of-state providers) will be required to upload a copy of their license using the *Upload Files and Submit* panel.

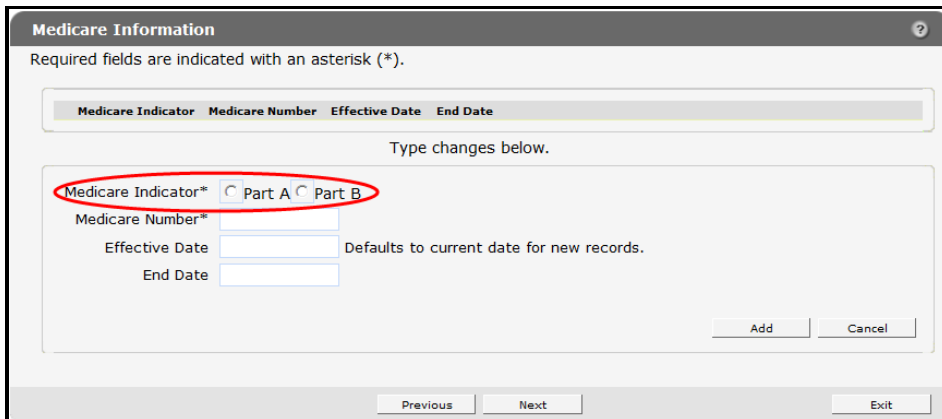
If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

8 Medicare Information Panel

The Medicare Information panel can be used to add or end date a provider's Medicare number. The panel for organizations includes Medicare Indicator radio buttons, which allow the provider to designate whether the Medicare number is for Part A or Part B.

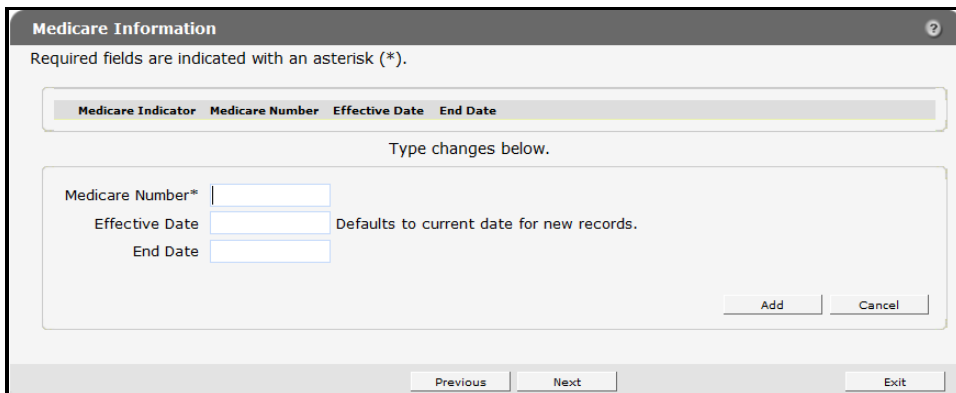
1. Click **Medicare Information** from the navigation links above the current panel.

The Medicare Information will be displayed.



Medicare Information Panel Organization

The panel for individuals will not contain the radio buttons since it is presumed the providers will only have a Part B Medicare number.



Medicare Information Panel Individual

To add a Medicare number, complete the following steps:

2. Enter the number in the Medicare Number field.
3. If the Medicare number is for an organization, click the radio button to select if the number refers to Medicare Part A or Part B.
4. Click **Add**.

The number will be added to the list at the top of the panel. The start date will be the current date, and the end date will be 12/31/2299.

Medicare Information ?

Required fields are indicated with an asterisk (*).

Medicare Indicator	Medicare Number	Effective Date	End Date
Part B	1111111111	11/05/2013	12/31/2299

Type changes below.

Medicare Number*

Effective Date Defaults to current date for new records.

End Date

Medicare Number Added

8.1 End Date a Medicare Number

To end date a Medicare number, complete the following steps:

1. Click the row for the number to end date.
The selected information will populate the fields on the panel.
2. Check the **No Longer Applies** box.
3. Click **Save**.

The following messages were generated:
Your information was updated successfully.

Medicare Information ?

Required fields are indicated with an asterisk (*).

Medicare Indicator	Medicare Number	Effective Date	End Date
Part B	1423012453	11/04/2013	12/31/2299

Type changes below.

Medicare Number

Effective Date Defaults to current date for new records.

End Date **Date the change is made is displayed as end date.**

No Longer Applies

Medicare Number End Dated.

A message will display at the top indicating that the update was successful.

If there are problems with the submission, the details of the error will display here. The Medicare number will remain on the list at the top of the panel; however, the current date will be displayed as the end date.

4. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.

- Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
- Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

9 Taxonomy Panel

Note: This panel is not available to Home Health/Personal Care Agencies, Independent Labs, or Transportation/Specialized Medical Vehicle (SMV) providers.

On the Taxonomy panel, users may update taxonomy code information. Taxonomy codes are standard code sets used to provide information about provider type and specialty for the provider's enrollment. ForwardHealth uses taxonomy codes as one piece of data for correctly identifying the provider's file.

1. Click **Taxonomy** from the navigation links above the current panel.

The Taxonomy panel will be displayed.

The screenshot shows a window titled "Taxonomy" with a table at the top containing one row: Primary Indicator (Y), Taxonomy (208D00000X), and Description (General Practice). Below the table is a section titled "Type changes below." containing a form with fields for "Taxonomy*" (with a search link), "Taxonomy Description" (with a dropdown arrow), and "Primary Taxonomy" (with a checkbox). At the bottom right of the form are "Add" and "Delete" buttons. At the bottom of the window are "Previous" and "Exit" buttons.

Taxonomy Panel

Providers may report multiple taxonomy codes to ForwardHealth as long as the codes accurately describe the provider type and specialty for the provider's enrollment.

9.1 Add a Taxonomy Code

To add a taxonomy code, complete the following steps:

1. Enter the new taxonomy code in the Taxonomy field or use the search link to search for the code.

After entering the code, click anywhere in the gray area of the panel. The description of the code will be displayed in the Taxonomy Description field, and the code and description will be displayed in a row at the top of the panel.

To search for a taxonomy code, complete the following steps:

- a. Click **Search** to the right of the Taxonomy field.

The Taxonomy search box will be displayed.

Taxonomy [Close]

Search ?

Taxonomy Effective Date
 End Date Active Date
 Inactive Date

search clear

Search Results

*** No rows found ***

Taxonomy Search Box

- b. Enter information in any of the search fields. To narrow the results, enter as much information as possible.
- c. Click **Search**.

The results will be displayed in the "Search Results" section.

Taxonomy [Close]

Search ?

Taxonomy Effective Date
 End Date Active Date
 Inactive Date

search clear

Search Results

Taxonomy	Description	Effective Date	End Date	Active Date	Inactive Date
282E00000X	Long Term Care Hospital	10/01/2006	12/31/2299	10/01/2006	12/31/2299
282J00000X	Religious Nonmedical Health Care Institution	10/01/2006	12/31/2299	10/01/2006	12/31/2299
282N00000X	General Acute Care Hospital	01/01/1995	12/31/2299	01/01/1995	12/31/2299
282NC0060X	General Acute Care Hospital - Critical Access	10/01/2003	12/31/2299	10/01/2003	12/31/2299
282NC2000X	General Acute Care Hospital - Children	01/01/1995	12/31/2299	01/01/1995	12/31/2299
282NR1301X	General Acute Care Hospital - Rural	01/01/1995	12/31/2299	01/01/1995	12/31/2299
282NW0100X	General Acute Care Hospital - Women	01/01/1995	12/31/2299	01/01/1995	12/31/2299

Search Results Section

- d. Select the applicable taxonomy code.

The Taxonomy search box will close and the selected information will populate the Taxonomy and Taxonomy Description fields. The code and description will also be displayed in a row at the top of the panel.

Taxonomy ?

Primary Indicator	Taxonomy	Description
A N	282NC0060X	General Acute Care Hospital - Critical Access
Y	282N00000X	General Acute Care Hospital

Type data below for new record.

Taxonomy* [Search]

Taxonomy Description

Primary Taxonomy

Add Delete

Previous Next Exit

Taxonomy Panel with Populated Information

If the system does not recognize the entered or selected taxonomy code as reflecting the user's provider type and specialty, a message indicating the provider type and entered or selected taxonomy code will be displayed above the panel. Confirm that the correct taxonomy code was entered or selected. If the taxonomy code is correct, check the **Ignore Message** box. ForwardHealth will manually verify the taxonomy code once it is submitted.

The following messages were generated:
This enrollment is for provider type Hospital and taxonomy entered is 282E00000X. If this is correct, check ignore message to submit the taxonomy.

Primary Indicator	Taxonomy	Description
A	N	282E00000X Long Term Care Hospital
N	N	282NC0060X General Acute Care Hospital - Critical Access
Y	N	282N00000X General Acute Care Hospital

Type changes below.

Taxonomy* 282E00000X [Search]

Taxonomy Description Long Term Care Hospital

Primary Taxonomy

Ignore Message

Add Delete

Previous Next Exit

Confirm the Entered or Selected Taxonomy Code Message

2. If the taxonomy code is the primary code, check the **Primary Taxonomy** box; otherwise, leave the box unchecked.

Providers who report multiple taxonomy codes can only designate *one* of the codes as the primary code. If a new taxonomy code is designated to be the primary code, the Primary Indicator for the old code will then display as "N" or not primary. ForwardHealth uses the primary code for identification purposes.

3. Click **Add**.

The taxonomy code will be added to the list at the top of the panel, and the top row and the fields on the panel will become blank. Repeat the procedure to add any additional taxonomy codes.

4. When finished adding codes, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other Demographic Maintenance Tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the Upload section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Refer to the [Upload Files and Submit](#) section of this guide for information about correcting error messages.

9.2 Delete a Taxonomy Code

To delete a taxonomy code, complete the following steps:

1. Click the row containing the taxonomy code to be deleted.
The selected information will populate the fields on the panel.
2. Click **Delete**.
The taxonomy code will be removed from the panel. Repeat the procedure for any other taxonomy codes to be deleted.
3. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

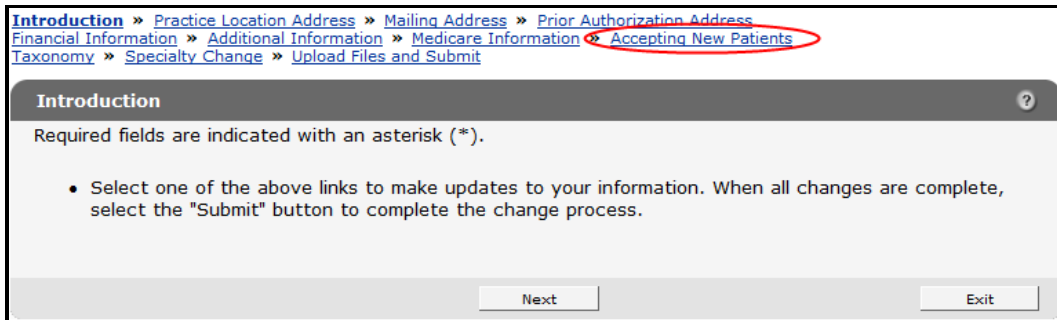
Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

10 Accepting New Patients Panel

Dental providers may limit the number of Medicaid and BadgerCare Plus members they accept in several ways; based on certain demographic information, certain days of the week, or certain times of the day. However, dental providers are prohibited from limiting their acceptance of Medicaid and BadgerCare Plus members in a way that discriminates against a protected class, as defined in federal and state anti-discrimination laws.

The link for the Accepting New Patients panel is only available to dental providers.



Accepting New Patients Link

1. Click **Accepting New Patients** from the navigation links above the current panel.

The Accepting New Patients panel will be displayed.

A screenshot of the 'Accepting New Patients' panel. The header bar contains the title 'Accepting New Patients' and a help icon. Below the header, it says 'Required fields are indicated with an asterisk (*).' There is a table with two columns: 'Accepting New Patients Indicator' and 'Limitation'. Below the table, there is a text input field for 'Are you accepting new patients?' with a dropdown arrow, and another dropdown menu for 'Limitation'. To the right of these fields are 'Add' and 'Cancel' buttons. At the bottom of the panel are three buttons: 'Previous', 'Next', and 'Exit'.

Accepting New Patients Panel

10.1 Add Information

To add information, complete the following steps:

1. Select **Yes**, **No**, or **Limited** from the Are you accepting new patients? drop-down menu.

If **Limited** is selected, choose a specific limitation on patients from the Limitation drop-down menu.

2. Click **Add**.

A row indicating your selection will be displayed at the top of the panel.

Accepting New Patients

Required fields are indicated with an asterisk (*).

Accepting New Patients Indicator	Limitation
Limited	Children Only

Type changes below.

Are you accepting new patients?

Limitation

Accepting New Patients Panel with Added Row

- When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

10.2 Change Information

To change information, complete the following steps:

- Click the row containing the information to be revised.
The selected information will populate the fields on the panel.
- Change the necessary information.

Accepting New Patients

Required fields are indicated with an asterisk (*).

Accepting New Patients Indicator	Limitation
Limited	Children Only

Type data below for new record.

Are you accepting new patients?

Limitation

Selections to Change Information

If **Yes** or **No** is selected from the drop-down menu, the Limitations field must be blank before saving the change.

3. Click **Save**.

The changed information will be displayed in the row at the top of the panel.

Selection Saved

4. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

10.3 Delete Information

To delete information, complete the following steps:

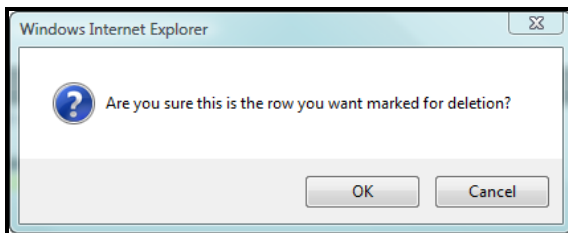
1. Select the row to be deleted.

The selected information will populate the fields on the panel.

Accepting New Patients Panel

2. Click **Delete**.

A dialog box will be displayed.



Dialog Box

3. Click **OK**.

The row will be removed from the panel.

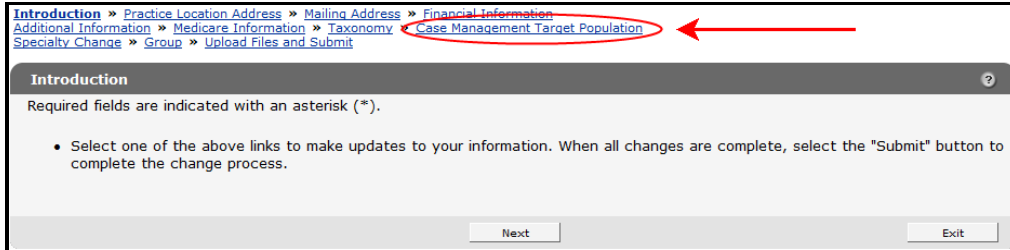
4. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

11 Case Management Target Population Panel

The link for the Case Management Target Population panel is only available to Case Management providers.



Case Management Target Population Link

1. Click **Case Management Target Population** from the navigation links above the current panel.

The Case Management Target Population panel will be displayed.

A screenshot of the 'Case Management Target Population' panel. The title bar says 'Case Management Target Population' with a help icon. The text inside says: 'Required fields are indicated with an asterisk (*).', followed by a bullet point: 'Existing data does not pre-populate for this screen. Only enter information on the screen when you have changes.' Below this is a section titled 'Please indicate the population(s) you will be serving (you may check more than one):' containing a list of checkboxes with corresponding descriptions: 'Persons age 65 or over.', 'Persons with a diagnosis of Alzheimer's disease or related dementia, as defined in s. 46.87(1)(a), Stats.', 'Persons with a developmental disability as defined in s. 51.01(5)(a), Stats.', 'Persons who are age 21 or older with a chronic mental illness as defined in s. 51.01(3g), Stats.', 'Persons with a physical or sensory disability, as defined in s. HFS 101.03, Wis. Admin. Code.', 'Persons having an alcohol or drug dependency, as defined in s. 51.01(1), Stats. or s. 51.01(8), Stats.', 'Persons diagnosed as having HIV infection, as defined in s. 252.01(2), Stats.', 'Persons who are severely emotionally disturbed and under age 21, as defined in s. 49.45(25)(a), Stats.', 'Persons diagnosed with asthma and under age 21.', 'Persons infected with tuberculosis.', 'Women 45 to 64 years old.', 'Children enrolled in a Birth to 3 Program certified under HFS 90, Wis. Admin. Code.', 'Families with a child(ren) under age 21 who is at risk of a physical, mental or emotional dysfunction.' Below this list is the text: 'This target population includes the following five subgroups:'. A numbered list follows: '1. Families with a child(ren) with special health care needs, including lead poisoning.', '2. Families with a child(ren) who is at risk of maltreatment.', '3. Families with a child(ren) involved in the juvenile justice system.', '4. Families where the primary caregiver has a mental illness, developmental disability, or substance abuse disorder that is affecting their child's growth and development.', '5. Families where the mother required or met the criteria to receive prenatal care coordination services under s. HFS 107.34 and coordination services continue to be required.' At the bottom of the panel are 'Previous', 'Next', and 'Exit' buttons.

Case Management Target Population Panel

The Case Management Target Population panel allows providers to change the target populations they are serving. Providers only need to indicate changes to existing information. Existing information will not display on the panel.

2. Check the checkbox for any new populations to be added. More than one population may be checked.
3. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.

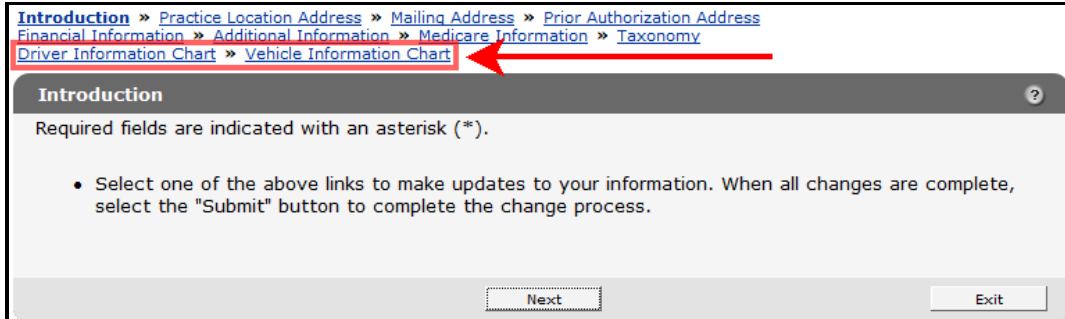
- Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
- Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

12 Driver and Vehicle Information Chart Panels

The Driver Information Chart and Vehicle Information Chart panels are only available to SMV providers.



Driver Information Chart and Vehicle Information Chart Links

12.1 Driver Information Chart Panel

Using this panel, SMV providers are required to maintain current information for all drivers and report any changes to ForwardHealth *before* they take effect.

Note: Although changes to driver information will immediately display in the demographic maintenance tool, the changed vehicle or driver information is not considered approved until 10 business days after the information was changed.

1. Click **Driver Information Chart** from the navigation links above the current panel.

The Driver Information Chart panel will be displayed.

A screenshot of the 'Driver Information Chart' panel. At the top, it says 'Required fields are indicated with an asterisk (*)'. Below this is a table with the following columns: Driver Name, Driver License Number, License Expiration Date, and Verified. The 'Verified' column contains the letter 'N'. Below the table, it says 'Type changes below.' and then a form for adding new drivers. The form includes: 'Driver Name*' (text input), 'Driver's License Number*' (text input), 'Driver's License Expiration Date*' (text input), 'License Type*' (radio buttons for 'Regular' and 'Commercial'), 'Regular or Commercial Drivers License Restrictions and Violations' (text area), 'First Aid Course Date' (text input), 'CPR Course Date' (text input), 'Ramp/Lift/Restraints Training Date' (text input), and 'Seizure Training Date' (text input). At the bottom right of the form are 'Add' and 'Cancel' buttons. At the bottom of the panel are 'Previous', 'Next', and 'Exit' buttons.

Driver Information Chart Panel

12.1.1 Adding a Driver

To add a driver, complete the following steps:

1. Enter all the required information.
If the driver has any restrictions on their driver's license, such as having to wear prescription glasses or traffic violations, enter them in the space provided.
2. After all of the required information has been added, click **Add**.

The page will refresh and the new driver will be added to the list at the top of the panel.

Driver Information Chart

Required fields are indicated with an asterisk (*).

Driver Name	Driver License Number	License Expiration Date	Verified
John D Driver	1111111111	12/31/2020	N

Type changes below.

Driver Name* [text box] First name, MI, Last name

Driver's License Number* [text box]

Driver's License Expiration Date* [text box]

License Type* Regular Commercial

Regular or Commercial Drivers License Restrictions and Violations [text box]

First Aid Course Date [text box]

CPR Course Date [text box]

Ramp/Lift/Restrictions Training Date [text box]

Seizure Training Date [text box]

[Add] [Cancel]

[Previous] [Next] [Exit]

New Driver Added to List

3. To add additional drivers, enter the information for another driver.
4. Click **Add**.

The page will refresh and the new driver will be added to the list at the top of the panel.

5. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

12.1.2 Changing Driver Information

To change driver information, complete the following steps:

1. Click the row for the driver whose information is to be revised.

Driver Information Chart

Required fields are indicated with an asterisk (*).

Driver Name	Driver License Number	License Expiration Date	Verified
John D Driver	D11111111	12/31/2015	Y

Type changes below.

Driver Name First name, MI, Last name

Driver's License Number

Driver's License Expiration Date

License Type Regular Commercial

Regular or Commercial Drivers License Restrictions and Violations

First Aid Course Date

CPR Course Date

Ramp/Lift/Restraints Training Date

Seizure Training Date

Select Driver

The fields on the panel will populate with the selected driver's information.

Driver Information Chart

Required fields are indicated with an asterisk (*).

Driver Name	Driver License Number	License Expiration Date	Verified
John D Driver	1111111111	12/31/2020	Y

Type changes below.

Driver Name* First name, MI, Last name

Driver's License Number*

Driver's License Expiration Date*

License Type* Regular Commercial

Regular or Commercial Drivers License Restrictions and Violations

First Aid Course Date

CPR Course Date

Ramp/Lift/Restraints Training Date

Seizure Training Date

No Longer Applies

Selected Driver

2. Change the necessary information. In this example, the Seizure Training Date is being changed.

First Aid Course Date 01/01/2010
CPR Course Date 01/01/2010
Ramp/Lift/Restraints Training Date 01/01/2010
Seizure Training Date 01/01/2014

No Longer Applies

Save

Previous Next Exit

Seizure Training Date Change

3. Click **Save**.

The page will refresh and a blank yellow row will be added to the top of the panel.

Driver Information Chart

Required fields are indicated with an asterisk (*).

Driver Name	Driver License Number	License Expiration Date	Verified
John D Driver	11111111111	12/31/2020	N
			Y

Type changes below.

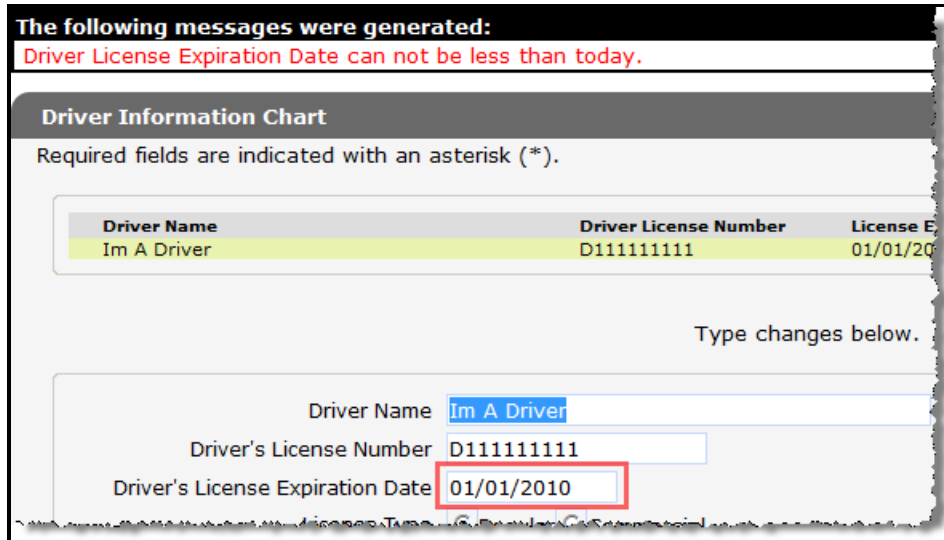
Driver Name* First name, MI, Last name
Driver's License Number*
Driver's License Expiration Date*
License Type* Regular Commercial
Regular or Commercial Drivers License Restrictions and Violations
First Aid Course Date
CPR Course Date
Ramp/Lift/Restraints Training Date
Seizure Training Date

Add Cancel

Previous Next Exit

Driver Information Saved

If there are any errors, an error message will be displayed at the top of the panel.



Example Error Message

Correct the information indicated in the error message and click **Save** to save the information.

- When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

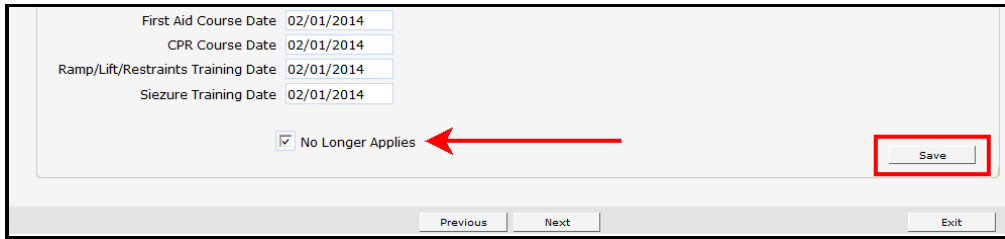
If there is a problem with the information entered an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

12.1.3 Delete a Driver

To delete a driver, complete the following steps:

- Click the row containing the driver to be deleted.

Information on the selected driver will populate the fields on the panel.



The screenshot shows a form with four date input fields: 'First Aid Course Date' (02/01/2014), 'CPR Course Date' (02/01/2014), 'Ramp/Lift/Restraints Training Date' (02/01/2014), and 'Siezure Training Date' (02/01/2014). Below these fields is a checkbox labeled 'No Longer Applies' which is checked. A red arrow points to this checkbox. To the right of the checkbox is a 'Save' button, which is highlighted with a red rectangle. At the bottom of the form are three buttons: 'Previous', 'Next', and 'Exit'.

Delete Driver

The page will refresh and the panels will be blank. The row for the deleted driver will remain on the panel until the change is submitted to ForwardHealth via the Upload Files and Submit panel.

2. Check the **No Longer Applies** box.
3. Click **Save**.
4. Repeat the procedure for any other driver to be deleted.
5. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

12.2 Vehicle Information Chart Panel

Using this tool, SMV providers are required to maintain current information for all vehicles and report any changes to ForwardHealth *before* they take effect.

Note: Although changes to vehicle information will immediately display in the demographic maintenance tool, the changed vehicle or driver information is not considered approved until 10 business days after the information was changed.

1. Click **Vehicle Information Chart** from the navigation links above the current panel.
The Vehicle Information Chart panel will be displayed.

Vehicle Information Chart

Required fields are indicated with an asterisk (*).

Year	Make	Model	License Plate Number	VIN	Verified
					N

Type changes below.

Vehicle Identification Number (VIN)*

License Plate Number*

Registration Expiration Date*

Vehicle Year*

Vehicle Make*

Vehicle Model*

Wheelchair Ramp Yes No

Wheelchair Lift Yes No

Cot or Stretcher Yes No

Add Cancel

Previous Next Exit

Vehicle Information Chart Panel

12.2.1 Adding a Vehicle

To add a vehicle, complete the following steps:

1. Enter all the required information.
2. After all the required information has been added, click **Add**.

The page will refresh and the new vehicle will be added to the list at the top of the panel.

Vehicle Information Chart

Required fields are indicated with an asterisk (*).

Year	Make	Model	License Plate Number	VIN	Verified
2012	Ford	Explorer	wis3000	ghr123456789fgh12	Y

Type changes below.

Vehicle Identification Number (VIN)*

License Plate Number*

Registration Expiration Date*

Vehicle Year*

Vehicle Make*

Vehicle Model*

Wheelchair Ramp Yes No

Wheelchair Lift Yes No

Cot or Stretcher Yes No

Add Cancel

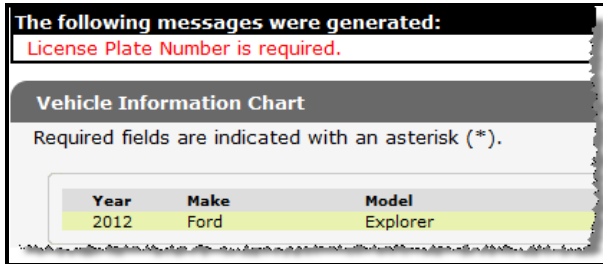
Previous Next Exit

New Vehicle Added to List

3. To add any additional vehicles, enter the information for another vehicle.
4. Click **Add**.

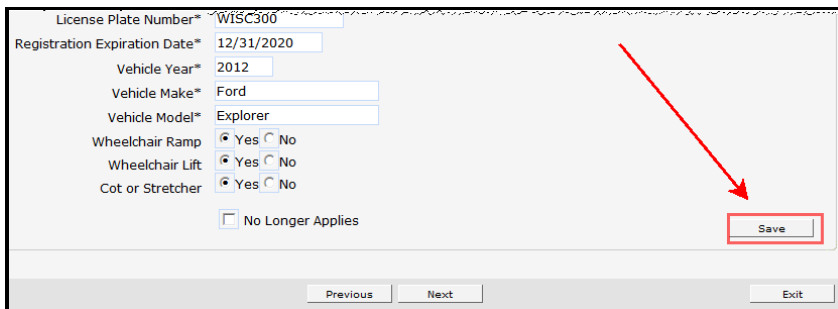
The page will refresh and the new vehicle will be added to the list at the top of the panel.

If the addition was not successful, an error message will display above the panel indicating what additional information is required or needs to be changed.



Example Error Message

Make the needed correction(s) on the panel and click **Save**.



Save Button

- When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

12.2.2 Changing Vehicle Information

To change vehicle information, complete the following steps:

- Click the row containing the vehicle information to be revised.

Vehicle Information Chart

Required fields are indicated with an asterisk (*).

Year	Make	Model	License Plate Number	VIN	Verified
2012	Ford	Explorer	wis3000	ghr123456789fgh12	N
					Y

Type changes below.

Vehicle Identification Number (VIN)*

License Plate Number*

Registration Expiration Date*

Vehicle Year*

Vehicle Make*

Vehicle Model*

Wheelchair Ramp Yes No

Wheelchair Lift Yes No

Cot or Stretcher Yes No

Select Vehicle

The fields on the panel will populate with the selected vehicle's information.

Vehicle Information Chart

Required fields are indicated with an asterisk (*).

Year	Make	Model	License Plate Number	VIN	Verified
2012	FORD	EXPLORER	WIS3000	GHR123456789FGH12	Y

Type changes below.

Vehicle Identification Number (VIN)*

License Plate Number*

Registration Expiration Date*

Vehicle Year*

Vehicle Make*

Vehicle Model*

Wheelchair Ramp Yes No

Wheelchair Lift Yes No

Cot or Stretcher Yes No

No Longer Applies

Vehicle Selected

2. Change the necessary information. In this example, the Registration Expiration Date is being changed.

Registration Expiration Date* 12/31/2015
Vehicle Year* 2012
Vehicle Make* FORD
Vehicle Model* EXPLORER
Wheelchair Ramp Yes No
Wheelchair Lift Yes No
Cot or Stretcher Yes No
 No Longer Applies

Seizure Training Date Change

3. Click **Save**.

The page will refresh and a blank yellow row will be added to the top of the panel.

Vehicle Information Chart
Required fields are indicated with an asterisk (*).

Year	Make	Model	License Plate Number	VIN	Verified
2012	FORD	EXPLORER	WIS3000	GHR123456789FGH12	N

Vehicle Information Saved

If there are any errors, an error message will be displayed at the top of the panel.

The following messages were generated:
Registration Expiration Date can not be less than today.

Vehicle Information Chart
Required fields are indicated with an asterisk (*).

Year	Make	Model	License Plate Number	VIN	Verified
2012	FORD	EXPLORER	WIS3000	GHR123456789FGH12	N

Save Error

Correct the information indicated in the error message and click **Save** to save the information.

4. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

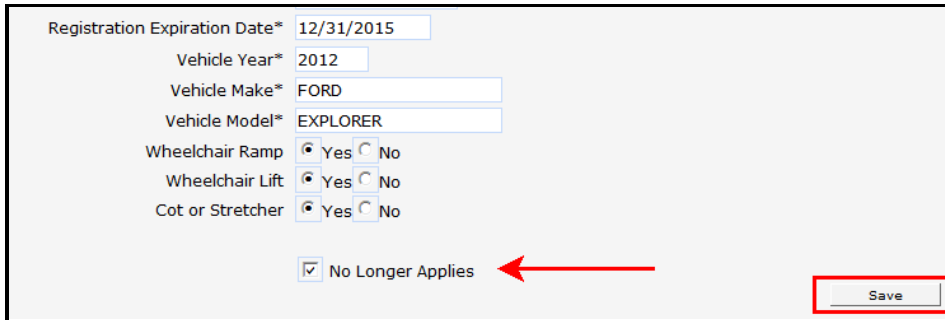
12.2.3 Delete a Vehicle

To delete a vehicle, complete the following steps:

1. Click the row containing the vehicle to be deleted.

Information on the selected vehicle will populate the fields on the panel.

2. Check the **No Longer Applies** box.



The screenshot shows a form with the following fields and options:

- Registration Expiration Date*: 12/31/2015
- Vehicle Year*: 2012
- Vehicle Make*: FORD
- Vehicle Model*: EXPLORER
- Wheelchair Ramp: Yes No
- Wheelchair Lift: Yes No
- Cot or Stretcher: Yes No
- No Longer Applies (indicated by a red arrow)
- Save (button, indicated by a red box)

Delete Vehicle

The page will refresh and the panels will be blank. The row for the deleted vehicle will remain on the panel until the change is submitted to ForwardHealth via the Upload Files and Submit panel.

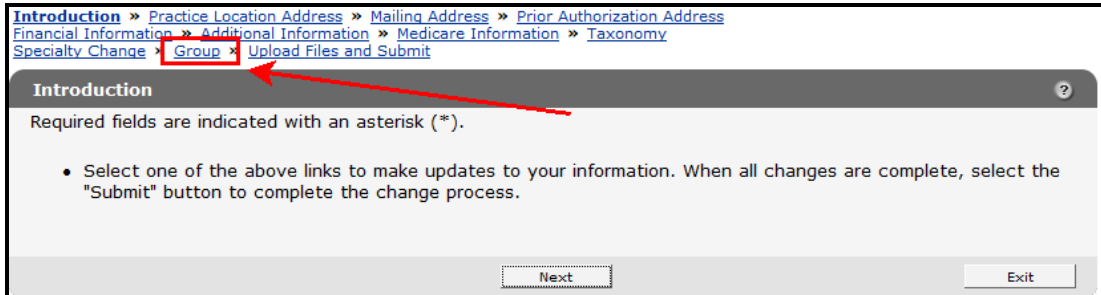
3. Click **Save**.
4. Repeat the procedure for any other vehicle to be deleted.
5. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

13 Group Panel

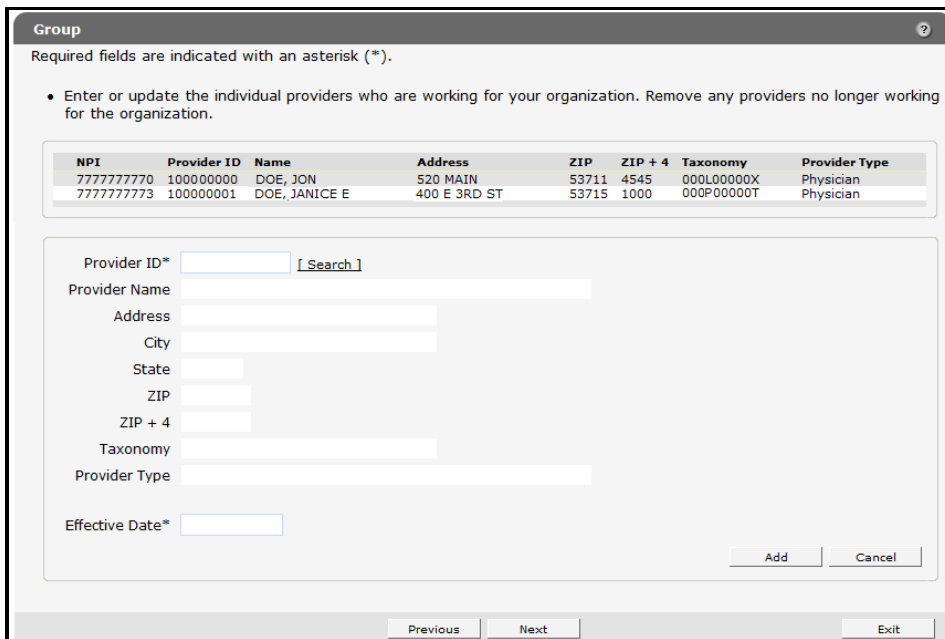
The Group panel is only available to Medicaid-enrolled organizations and clinics.



Group Link

1. Click **Group** from the navigation links above the current panel.

The Group panel will be displayed.



Group Panel

13.1 Add a Provider

To add an individual Medicaid-enrolled provider to the organization or clinic, complete the following steps:

1. Click the **Search** link next to the Provider ID field.

The Provider ID Search panel will be displayed.

Provider ID Search Sub-panel

2. Enter the Provider ID for the provider to be added.
3. Click **Search**.

The Provider ID Search Results panel will populate with the information for the selected provider.

NPI	Provider ID	Name	Address	City	State	ZIP	ZIP + 4	Taxonomy	Payer	Provider Type
777777777	100000006	DOE, JOHN	1212 MAIN ST	MADISON	WI	53710	2000	200Z00000X	Medicaid	Physician

Provider ID Search Results Panel

4. Click the row for the selected provider.

The Search Results panel will close and the fields on the Group panel will populate with the provider's information.

NPI	Provider ID	Name	Address	ZIP	ZIP + 4	Taxonomy	Provider Type
777777777	100000000	DOE, JON	520 MAIN	53711	4545	000L00000X	Physician
777777773	100000001	DOE, JANICE E	400 E 3RD ST	53715	1000	000P00000T	Physician

Provider ID* 777777777 [Search]

Provider Name DOE, JOHN

Address 1212 MAIN ST

City MADISON

State WI

ZIP 53710

ZIP + 4 2000

Taxonomy 200Z00000X

Provider Type Physician

Effective Date*

Add Cancel

Previous Next Exit

Group Panel Populated with Provider's Information

5. In the **Effective Date** field, enter the effective date for when the provider is to be added to the group.
6. Click **Add**.

The selected provider will be added to the list at the top of the panel.

Group

Required fields are indicated with an asterisk (*).

- Enter or update the individual providers who are working for your organization. Remove any providers no longer working for the organization.

NPI	Provider ID	Name	Address	ZIP	ZIP + 4	Taxonomy	Provider Type
777777777	100000002	DOE, JOHN	1212 MAIN ST	53710	2000	200Z00000X	Physician
777777770	100000000	DOE, JON	520 MAIN	53711	4545	000L00000X	Physician
777777773	100000001	DOE, JANICE E	400 E 3RD ST	53715	1000	000P00000T	Physician

Provider ID* [Search]

Provider Name

Address

City

State

ZIP

ZIP + 4

Taxonomy

Provider Type

Effective Date*

Add Cancel

Previous Next Exit

Provider Added

7. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

13.2 Remove a Provider

To remove a provider from the Group panel:

1. Click the row for the provider to be removed from the list at the top of the panel. The fields on the Group panel will populate with the selected provider's information.

Group

Required fields are indicated with an asterisk (*).

- Enter or update the individual providers who are working for your organization. Remove any providers no longer working for the organization.

NPI	Provider ID	Name	Address	ZIP	ZIP + 4	Taxonomy	Provider Type
1234510216	100000960	BIPOLE, ANNA I	1114 HILL	90210	9997	2084P0800X	Physician
3541005617	100001275	PHYSICIAN, BILL	789 TEST DR	53711	4561	208D00000X	Physician
1451450203	100001281	PHYSICIAN, JIM	789 TEST DR	53710	1354	207P00000X	Physician
3333333334	100001523	PHYSICIAN, JOHN	159 TEST AVE	53710	1561	207Q00000X	Physician

Provider ID* 3541005617 [Search]

Provider Name PHYSICIAN, BILL

Address 789 TEST DR

City MADISON

State WI

ZIP 53711

ZIP + 4 4561

Taxonomy 208D00000X

Provider Type Physician

Effective Date* 12/20/2013

End Date

Save

Previous Next Exit

Provider Selected

2. In the **End Date** field, enter the date when the provider will no longer be part of the group.
3. Click **Save**.

The fields on the panel will become blank. Repeat the procedure for any other providers to be removed from the group. After the changes are submitted, the provider will be removed from the list once the end date is reached.

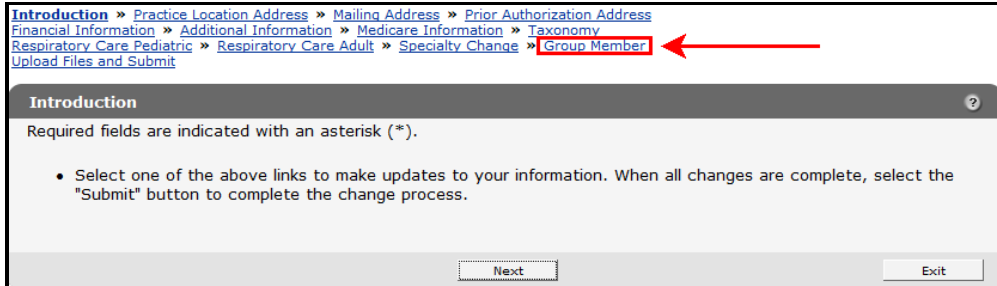
4. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

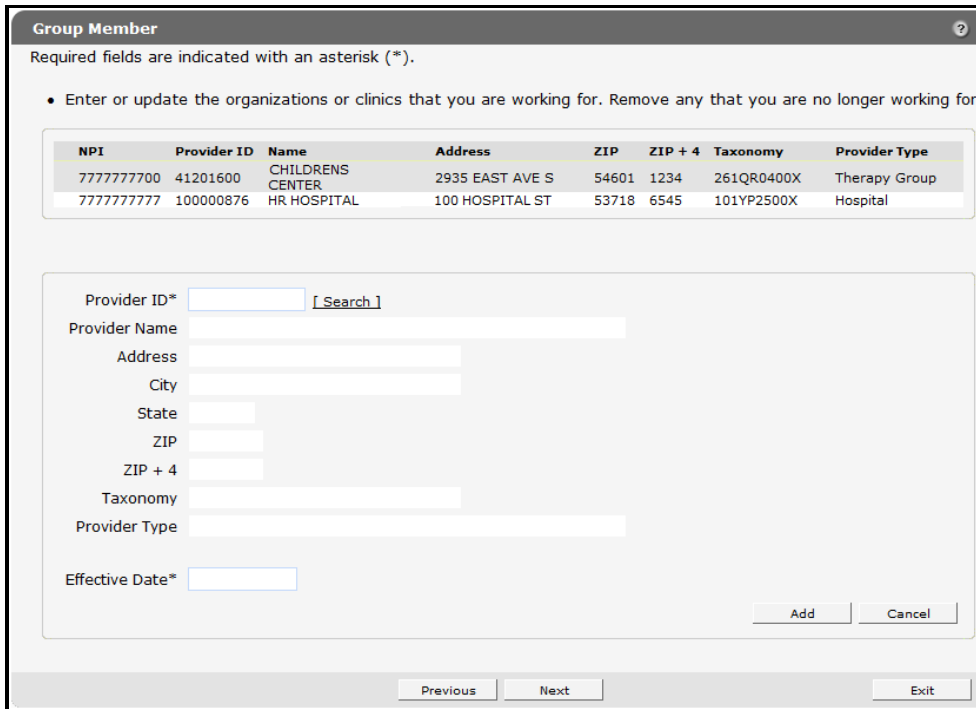
14 Group Member Panel

The Group Member panel is available to all individual Medicaid-enrolled providers to enter or update information about their group affiliations.



Group Member Link

1. Click **Group Member** from the navigation links above the current panel. The Group panel will be displayed.



Group Member Panel

14.1 Add a Group Affiliation

To add a group affiliation, complete the following steps:

1. Click the **Search** link next to the Provider ID field.

The Provider ID Search sub-panel will be displayed.

Provider ID* [Search]

Provider Name

Address

City

State

ZIP

Provider ID Search [Close]

Search

Provider ID

Provider ID Search Sub-panel

2. Enter the Provider ID for the provider to be added.
3. Click **Search**.

The Provider ID Search Results panel will populate with the information for the selected provider.

Provider ID Search [Close]

Search

Provider ID

Search Results

NPI	Provider ID	Name	Address	City	State	ZIP	ZIP + 4	Taxonomy	Payer	Provider Type
1204132017	100000831	ASC OF MADISON	651 RANDOM AVE	MADISON	WI	53711	3120	261QA1903X	Medicaid	Ambulatory Surgical Center (ASC)

Provider ID Search Results Panel

4. Click the row for the selected provider.

The Search Results panel will close, and the fields on the Group Member panel will populate with the group's information.

Group Member [Close]

Required fields are indicated with an asterisk (*).

- Enter or update the organizations or clinics that you are working for. Remove any that you are no longer working for.

NPI	Provider ID	Name	Address	ZIP	ZIP + 4	Taxonomy	Provider Type
7777777700	41201600	CHILDRENS CENTER	2935 EAST AVE S	54601	1234	261QR0400X	Therapy Group
7777777777	100000876	HR HOSPITAL	100 HOSPITAL ST	53718	6545	101YP2500X	Hospital

Provider ID* [Search]

Provider Name

Address

City

State

ZIP

ZIP + 4

Taxonomy

Provider Type

Effective Date*

Group Member Panel Populated with Group's Information

5. In the **Effective Date** field, enter the effective date for when the group affiliation is to be added to the provider.
6. Click **Add**.

The selected group affiliation will be added to the list at the top of the panel.

The screenshot shows a window titled "Group Member" with a subtitle "Required fields are indicated with an asterisk (*)." Below the subtitle is a bullet point: "Enter or update the organizations or clinics that you are working for. Remove any that you are no longer working for." A table lists three group affiliations. A red arrow points to the first row. Below the table is a form with fields for Provider ID*, Provider Name, Address, City, State, ZIP, ZIP + 4, Taxonomy, Provider Type, and Effective Date*. The form has "Add" and "Cancel" buttons. At the bottom of the window are "Previous", "Next", and "Exit" buttons.

NPI	Provider ID	Name	Address	ZIP	ZIP + 4	Taxonomy	Provider Type
1204132017	100000831	ASC OF MADISON	651 RANDOM AVE	53711	3120	261QA1903X	Ambulatory Surgical Center (ASC)
7777777773	41201600	CHILDRENS CENTER	2935 EAST AVE S	54601	1234	261QR0400X	Therapy Group
7777777773	100000876	HR. HOSPITAL	100 HOSPITAL ST	53718	6545	101YP2500X	Hospital

Group Affiliation Added

7. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

14.2 Remove a Group Affiliation

To remove a group affiliation from the Group Member panel:

1. Click the row for the group affiliation to be removed from the list at the top of the panel.

The fields on the panel will populate with the information for the selected group affiliation.

Group Member
Required fields are indicated with an asterisk (*).

- Enter or update the organizations or clinics that you are working for. Remove any that you are no longer working for.

NPI	Provider ID	Name	Address	ZIP	ZIP + 4	Taxonomy	Provider Type
1204132017	100000831	ASC OF MADISON	651 RANDOM AVE	53711	3120	261QA1903X	Ambulatory Surgical Center (ASC)
777777773	41201600	CHILDRENS CENTER	2935 EAST AVE S	54601	1234	261QR0400X	Therapy Group
777777777	100000876	HR HOSPITAL	100 HOSPITAL ST	53718	6545	101YP2500X	Hospital

Provider ID* 777777773 [Search]
Provider Name CHILDRENS CENTER
Address 2935 EAST AVE S
City LACROSSE
State WI
ZIP 54601
ZIP + 4 1234
Taxonomy 261QR0400X
Provider Type Therapy Group
Effective Date* 01/01/2000
End Date

Save

Previous Next Exit

Group Affiliation Selected

- In the **End Date** field, enter the date when the provider will no longer be affiliated with the group.
- Click **Save**.

The fields on the panel will become blank. Repeat the procedure for any other group affiliations to be removed. After the changes are submitted, the group affiliation will be removed from the list once the end date is reached.

- When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

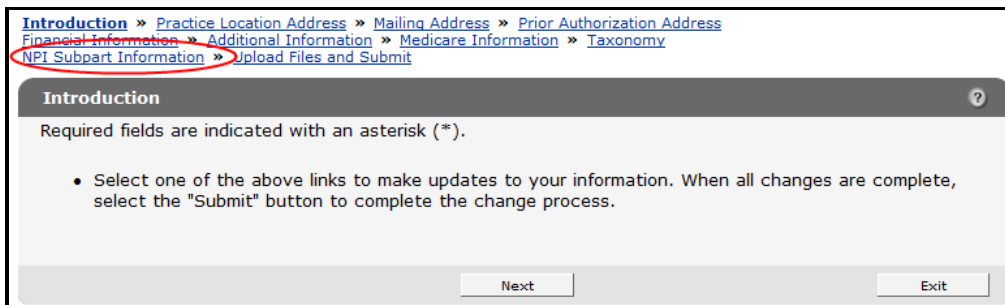
Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

15 NPI Subpart Information Panel

On the National Provider Identifier (NPI) Subpart Information panel, hospitals may provide NPI subpart numbers to ForwardHealth. Providers are required to provide ForwardHealth with only those NPI subparts that represent hospital units that are not separately enrolled in Wisconsin Medicaid. ForwardHealth uses NPI subparts as additional identifiers that are linked to the hospital's enrollment.

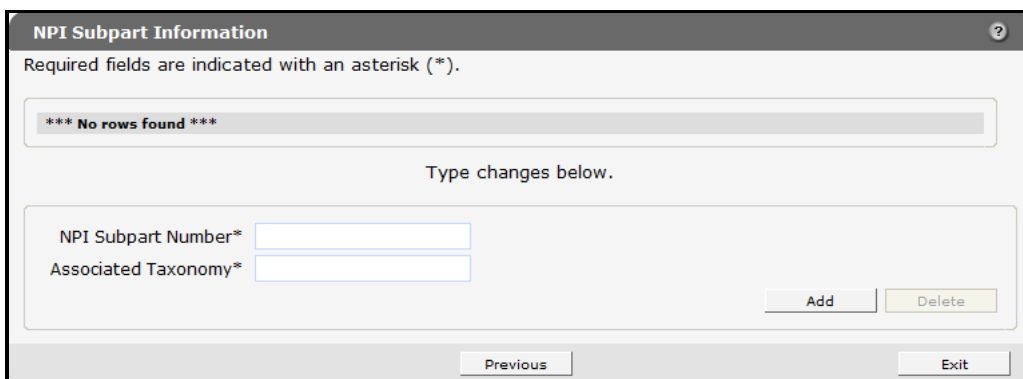
The link for the NPI Subpart Information panel is only available to hospital providers.



NPI Subpart Information Link

1. Click **NPI Subpart Information** from the navigation links above the current panel from the navigation links above the current panel.

The NPI Subpart Information panel will be displayed.



NPI Subpart Information Panel

15.1 Add a National Provider Identifier Subpart

To add a NPI subpart, complete the following steps:

2. Enter the subpart number to be added in the NPI Subpart Number field.
3. Enter the taxonomy number associated with the NPI subpart in the Associated Taxonomy field.
4. Click **Add**.

A row containing the NPI subpart will be added at the top of the panel.

The screenshot shows a window titled "NPI Subpart Information" with a help icon in the top right corner. Below the title bar, it states "Required fields are indicated with an asterisk (*)." There is a table with two columns: "NPI Subpart Number" and "Associated Taxonomy". The first row contains the values "1000000000" and "282N00000X". Below the table, the text "Type changes below." is displayed. Underneath, there are two input fields: "NPI Subpart Number*" and "Associated Taxonomy*", both with asterisks indicating they are required. To the right of these fields are two buttons: "Add" and "Delete". At the bottom of the panel, there are two buttons: "Previous" and "Exit".

NPI Subpart Information Panel with Added Row

5. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

15.2 Delete a National Provider Identifier Subpart

To delete an NPI subpart, complete the following steps:

1. Click the row containing the NPI subpart to be deleted.

The NPI subpart information will populate the fields on the panel.
2. Click **Delete**.

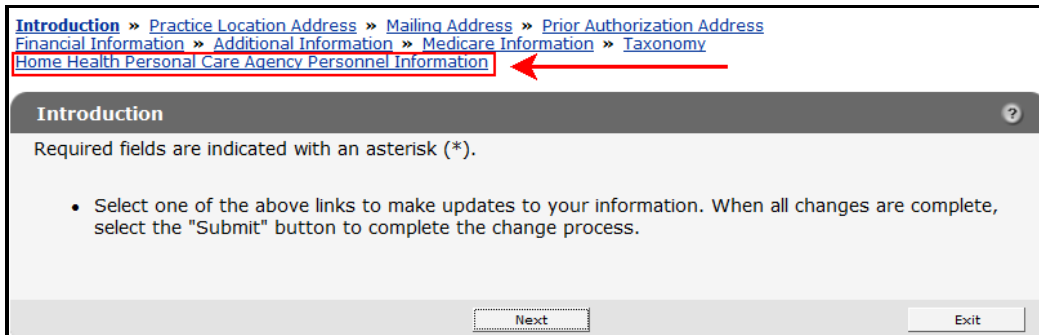
The NPI subpart information will be removed from the panel.
3. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

16 Home Health Personal Care Agency Personnel Information

The link for the Personnel Information panel is only available to home health and personal care agency providers.



Personnel Information Link

1. Click **Home Health Personal Care Agency Personnel Information** from the links above the current panel.

The Home Health/Personal Care Agency Personnel Information panel will be displayed.

The screenshot shows the "Home Health / Personal Care Agency Personnel Information" panel. It has a title bar with a help icon (?). Below the title bar is the text: "Required fields are indicated with an asterisk (*).". Below this is a table header with the following columns: **Last Name**, **First Name**, **Position/Title/Role**, **License Number**, **Employment End Date**, and **Status**. Below the table header is the text: "Type changes below.". Below this is a form with the following fields: **First Name*** (text input), **Middle Initial** (text input), **Last Name*** (text input), **Date of Birth*** (text input), **Social Security Number*** (text input), **Employment Effective Date*** (text input), **License Number** (text input), **Issuing State** (dropdown menu), and **Position/Role/Title*** (dropdown menu). At the bottom right of the form are "Add" and "Cancel" buttons. At the bottom of the panel are "Next" and "Exit" buttons.

Home Health/Personal Care Agency Personnel Information Panel

Note: Required fields are indicated with an asterisk.

On the Personnel Information panels, home health and personal care agencies are required to report personnel information in order to ensure appropriate licensing.

16.1 Add New Personnel

To add new employees, complete the following steps:

1. Enter the employee's first name in the First Name field.
2. Enter the employee's last name in the Last Name field.
3. Enter the employee's date of birth (DOB) using MMDDCCYY format in the Date of Birth field.
4. Enter the employee's Social Security number (SSN) in the Social Security Number field. Enter numbers only. The SSN will be automatically formatted.
5. Enter the date the employee started working at the agency using MMDDCCYY format in the Employment Effective Date field.
6. If applicable, enter the employee's license number in the License Number field.
7. If applicable, select the state that issued the employee's license from the Issuing State drop-down menu. If a state other than Wisconsin issued the employee's license, ForwardHealth will manually review and update the employee's information once it is submitted.

Note: A license number and issuing state are required for all personnel except home health workers and personal care workers.

8. Select the employee's job title or position with the agency from the Position/Role/Title drop-down menu.

Note: Click **Cancel** at any time to delete all entered information from the fields on the panel.

9. Click **Add**.

If a license number is entered that cannot be immediately verified, an error message will display at the top of the panel, the License Number field will be highlighted, and a License number is correct and valid checkbox will display at the bottom of the panel.

The following messages were generated:
Wisconsin license number cannot be verified. Verify the data entered is correct then continue updating personnel.

Home Health Personal Care Agency Personnel Information

Required fields are indicated with an asterisk (*).

Last Name	First Name	Position/Title/Role	License Number	Employment End Date	Status
EMPLOYEE	IM	RN	1111111111		

Type changes below.

First Name* IM
Middle Initial A
Last Name* EMPLOYEE
Date of Birth* 01/01/1976
Social Security Number* 000-00-0000
Employment Effective Date* 04/01/2008
License Number 1111111111
Issuing State WI
Position/Role/Title* RN

License number is correct and valid.

Save

Previous Next Exit

License Number Cannot Be Immediately Verified

10. Verify that the entered license number is correct. If the number is correct, check the **License number is correct and valid** box.
11. Click **Save**.

A row displaying the entered information will be added at the top of the panel.

Last Name	First Name	Position/Title/Role	License Number	Employment End Date
EMPLOYEE	IM	RN	111111111	

Type changes below.

First Name*

Middle Initial

Last Name*

Date of Birth*

Social Security Number*

Employment Effective Date*

License Number

Issuing State

Position/Role/Title*

Add Cancel

Next Exit

Home Health/Personal Care Agency Personnel Information Panel with Added Row

12. When finished entering information, one of three options may be chosen:

- Click **Next** to go to the next panel on the list.
- Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
- Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

16.2 Change Unsubmitted Personnel Information

Note: This section applies to personnel information that has been added to the Home Health/Personal Care Agency Information panel but not yet submitted to ForwardHealth from the Upload Files and Submit panel.

To change employee information that has not been submitted, complete the following steps:

1. Click the row containing the employee information to be revised.

The employee's information will populate the fields on the panel.

2. Change the necessary information.

Home Health / Personal Care Agency Personnel Information

Required fields are indicated with an asterisk (*).

Last Name	First Name	Position/Title/Role	License Number	Employment End Date
EMPLOYEE	IM	RN	1111111111	
EMPLOYEE	TONY	Personal Care Worker		
MARRIED EMPLOYEE	IM	Home Health Worker		

Type changes below.

First Name* IM
Middle Initial A
Last Name* EMPLOYEE
Date of Birth* 01/01/1976
Social Security Number* 000-00-0000
Employment Effective Date* 04/10/2008
License Number 1111111111
Issuing State WI
Position/Role/Title* RN

License number is correct and valid.

delete Save

Next Exit

Home Health/Personal Care Agency Personnel Information Panel

3. Click **Save**.

The row at the top of the panel will be updated with the changed information.

4. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and

choose one of the above choices for continuing to another panel or submitting your information.

16.3 Delete Unsubmitted Personnel Information

Note: Only employee information that has not yet been submitted can be deleted. Once an employee's information is submitted, the information cannot be deleted; however, submitted employee information can be ended.

To delete employee information that has not been submitted, complete the following steps:

1. Click the row containing the information to be deleted.

The employee's information will populate the fields on the panel.

Home Health / Personal Care Agency Personnel Information

Required fields are indicated with an asterisk (*).

Last Name	First Name	Position/Title/Role	License Number	Employment End Date
EMPLOYEE	TONY	Personal Care Worker		
EMPLOYEE	IM	Home Health Worker		

Type changes below.

First Name* TONY
Middle Initial B
Last Name* EMPLOYEE
Date of Birth* 05/05/1968
Social Security Number* 111-11-1111
Employment Effective Date* 09/10/2010
License Number
Issuing State
Position/Role/Title* Personal Care Worker

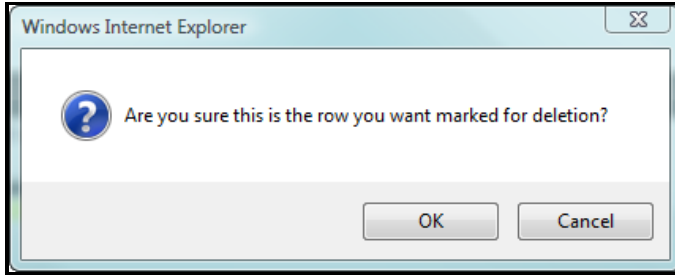
delete Save

Next Exit

Home Health/Personal Care Agency Personnel Information Panel

2. Click **Delete**.

A dialog box will be displayed.



Dialog Box

3. Click **OK**.

The row will be removed from the panel.

4. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

16.4 Change Submitted Personnel Information

Note: This section applies to personnel information that has been previously submitted.

1. Click the row containing the employee information to be revised.

The employee's information will populate the fields on the panel.

Note: To protect personal information, an employee's SSN and DOB will not display once submitted.

2. Change the necessary information.

Last Name	First Name	Position/Title/Role	License Number	Employment End Date
EMPLOYEE	IM	Home Health Worker		
EMPLOYEE	AMY	Personal Care Worker		

Type changes below.

First Name* IM
Middle Initial A
Last Name* MARRIED EMPLOYEE
Employment Effective Date* 04/01/2008
Employment End Date
License Number
Issuing State
Position/Role/Title* Home Health Aide

Save

Next Exit

Home Health/Personal Care Agency Personnel Information Panel

3. Click **Save**.

The row at the top of the panel will be updated with the changed information.

4. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

16.5 Enddate Submitted Personnel Information

Note: This section applies to personnel information that has been previously submitted.

1. Click the row containing the employee information to be enddated.
The employee's information will populate the fields on the panel.

2. Enter the last day the employee was or will be employed at the agency in the Employment End Date field.

Home Health / Personal Care Agency Personnel Information

Required fields are indicated with an asterisk (*).

Last Name	First Name	Position/Title/Role	License Number	Employment End Date
MARRIED EMPLOYEE	IM	Home Health Worker		
EMPLOYEE	AMY	Personal Care Worker		

Type changes below.

First Name* AMY
Middle Initial B
Last Name* EMPLOYEE
Employment Effective Date* 09/10/2010
Employment End Date 08/10/2012
License Number
Issuing State
Position/Role/Title* Personal Care Worker

Save

Next Exit

Home Health/Personal Care Agency Personnel Information Panel

3. Click **Save**.

The row at the top of the panel will be updated with the changed information.

Last Name	First Name	Position/Title/Role	License Number	Employment End Date
MARRIED EMPLOYEE	IM	Home Health Worker		
EMPLOYEE	AMY	Personal Care Worker		08/10/2012

Type changes below.

First Name*

Middle Initial

Last Name*

Date of Birth*

Social Security Number*

Employment Effective Date*

License Number

Issuing State

Position/Role/Title*

Add Cancel

Next Exit

Home Health/Personal Care Agency Personnel Information Panel

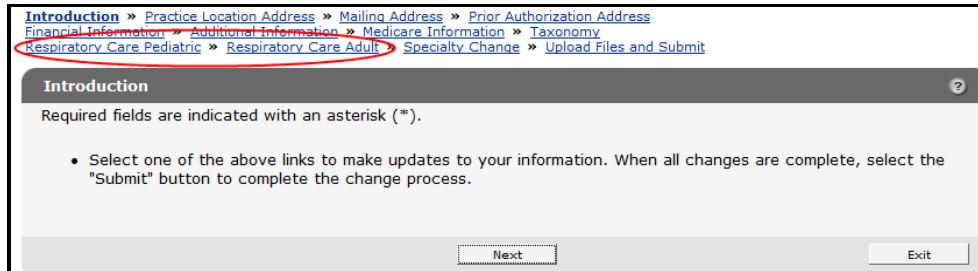
4. When finished entering information, one of three options may be chosen:
- Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

17 Respiratory Care Panels

The Respiratory Care Pediatric and Respiratory Care Adult panels are only available to nurse practitioners and nurses in independent practice (NIP) who provide respiratory care services (RCS).



Respiratory Care Pediatric Links

Note: The Respiratory Care Pediatric and Adult panels are the same except for the links to the Declaration of Skill Acquisition forms. The following procedure applies to both panels.

The Respiratory Care panels allow nurse practitioners and NIP who provide RCS services to update the skills and knowledge requirements necessary to provide RCS services to members enrolled in Wisconsin Medicaid and BadgerCare Plus. Providers are also required to specify how and when they complied with the requirements.

To access the Respiratory Care Pediatric panel:

1. Click **Respiratory Care Pediatric** from the links above the current panel.
The Respiratory Care Pediatric panel will be displayed.

Respiratory Care Pediatric Panel

2. Check either **Yes** or **No** regarding whether or not the provider has been recognized by an approved facility for having successfully demonstrated the respiratory care skills listed in Elements 1-14 of the Declaration of Skill Acquisition — Pediatric form.
If necessary, click the **Declaration of Skill Acquisition — Pediatric** link to view the form.
3. Enter the **Date of Successful Completion of Skills Demonstration** in the following format: mm/dd/yyyy.
4. Check either **Yes** or **No** regarding whether or not the provider possesses a current cardiopulmonary resuscitation (CPR) card from an approved facility that documents successful completion of a CPR skills course for the professional rescuer.
5. Enter the information for the facility where CPR training was received.
6. Enter the indicated information from your CPR Card.
7. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.

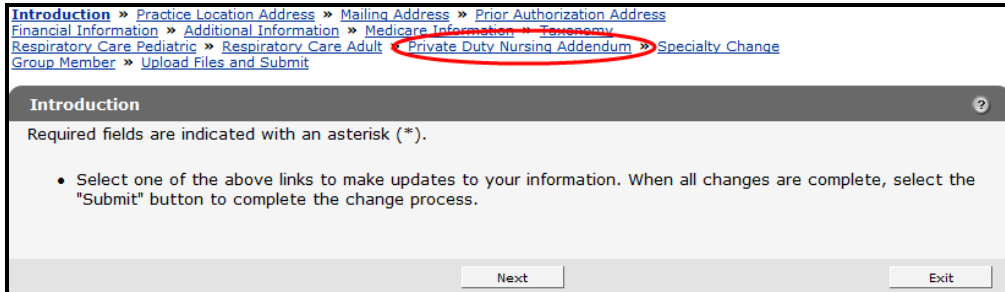
- Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

18 Private Duty Nursing Addendum Panel

The Private Duty Nursing Addendum panel is only available to NIP.

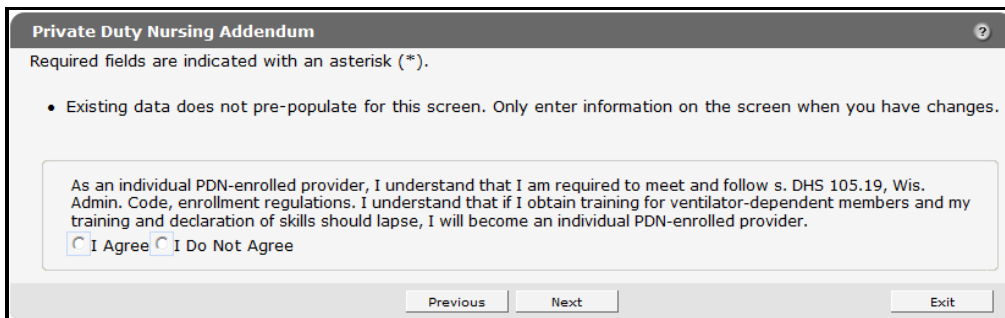


Private Duty Nursing Addendum Link

To access the Private Duty Nursing Addendum panel:

1. Click **Private Duty Nursing Addendum** from the links above the current panel.

The Private Duty Nursing Addendum panel will be displayed.



Private Duty Nursing Addendum Panel

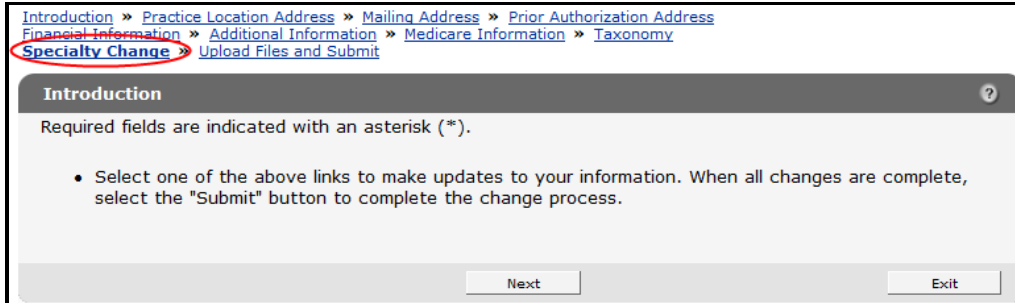
2. Check either **I Agree** or **I Do Not Agree** to the addendum.
3. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.
 - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
 - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

19 Specialty Change Panel

The Specialty Change panel is only available to Medicaid providers whose provider type allows for more than one specialty.



Specialty Change Link

1. Click **Specialty Change** from the links above the current panel.

The Specialty Change panel will be displayed.

A screenshot of the 'Specialty Change' panel. It has a title bar with a help icon. The text says: 'Required fields are indicated with an asterisk (*).'. A bullet point reads: 'Please ensure the appropriate provider specialty is chosen based on your license or certification. For further clarification please contact Provider Services before submitting a change.' Below this is a section for 'Current Provider Specialty' with a text input field containing 'Family Practice'. The next section is 'New Provider Specialty', which contains a grid of radio buttons for various specialties: No change needed, Nephrology, Pediatrician, Allergy & Immunology, Neurological Surgery, Physical Medicine and Rehab, Anesthesiology, Neurology, Plastic Surgery, Cardiovascular Disease, Nuclear Medicine, Preventative Medicine, Dermatology, Obstetrics and Gynecology, Proctology, Emergency Medicine, Oncology and Hematology, Psychiatry, Gastroenterology, Ophthalmology, Pulmonary Disease, General Practice, Orthopedic Surgery, Radiology, General Surgery, Otolaryngology, Thoracic and Cardiovascular Surgery, Geriatrics, Pathology, Urology, and Internal Medicine. At the bottom are 'Previous', 'Next', and 'Exit' buttons.

Specialty Change Panel

The panel will display different choices depending on the provider's provider type.

2. Click the radio button to select a new provider specialty.
3. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.

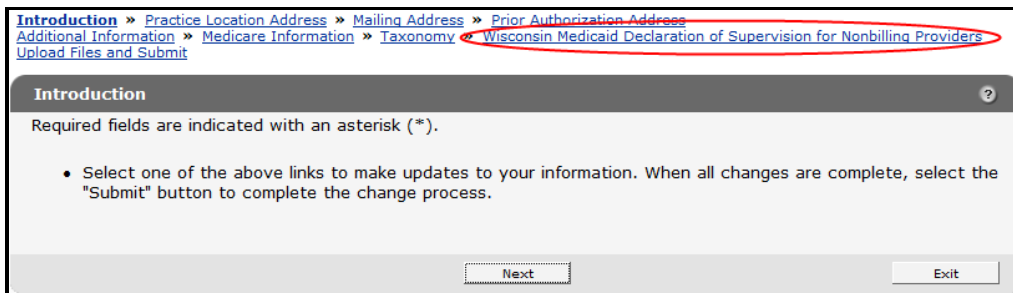
- Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
- Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

20 Wisconsin Medicaid Declaration of Supervision for Nonbilling Providers

The link for the Wisconsin Medicaid Declaration of Supervision for Nonbilling Providers panel will only be available to the following providers: physician assistants, physical therapy assistants, occupational therapist assistants, and speech-language pathology (SLP) Bachelor Level (BA).



Wisconsin Medicaid Declaration of Supervision for Nonbilling Providers Link

1. Click **Wisconsin Medicaid Declaration of Supervision for Nonbilling Providers** from the links above the current panel.

The Wisconsin Medicaid Declaration of Supervision for Nonbilling Providers panel will be displayed.

The screenshot shows the 'Wisconsin Medicaid Declaration of Supervision for Nonbilling Providers' panel. It has a title bar with a help icon. Below the title bar is the text: 'Required fields are indicated with an asterisk (*).' and a bullet point: 'If you updated/changed your supervision information, please verify your practice location information is correct and up to date.' The form contains the following fields: 'Name - Supervisor *' (text box), 'Address - Supervisor' section with 'Street Address Line 1*' (text box), 'Street Address Line 2' (text box), 'City*' (text box), 'State/ZIP*' (dropdown menu, text box, hyphen, text box), 'Telephone Number - Supervisor' (text box) and 'Ext.' (text box), and 'Supervisor's Effective Date*' (text box). At the bottom of the panel are 'Previous', 'Next', and 'Exit' buttons.

Wisconsin Medicaid Declaration of Supervision for Nonbilling Providers Panel

This panel allows the provider to enter his or her supervisor information and is required if a provider changes his or her practice location address; however, if there is a change of supervisors, the provider is *not* required to change his or her practice location unless a change is warranted.

1. Enter the required information.
2. When finished entering information, one of three options may be chosen:
 - Click **Next** to go to the next panel on the list.

- Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
- Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the [Upload Files and Submit](#) section of this guide.

Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

21 Upload Files and Submit Panel

After completing all revisions, the changes must be submitted to ForwardHealth from the Upload Files and Submit panel. Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.



Upload Files and Submit Link

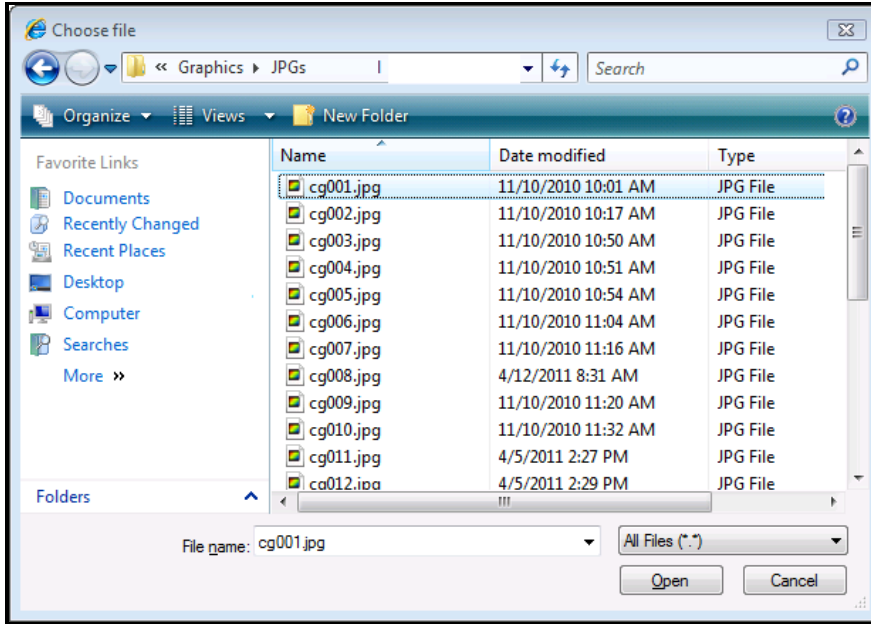
1. Click **Upload Files and Submit** from the links above the current panel.
The Upload Files and Submit panel will be displayed.

A screenshot of the 'Upload Files and Submit' panel. The panel title is 'Upload Files and Submit'. Below the title, it says 'Required fields are indicated with an asterisk (*).'. There are three bullet points: 'Upload any supporting documentation needed (i.e. licenses, certifications, etc.). If you have no files to upload, select the submit button to save your changes.', 'Select "Browse" to locate each file you wish to upload.', and 'Select "Upload" when you are ready to upload each file.'. A 'Please Note' section states: 'JPG, JPEG, and PDF file formats are accepted for supporting document uploads.'. Below the instructions is a form with a 'Upload File' section containing a 'File Path' text box, a 'Browse...' button, and an 'Upload' button. Below that is a 'List of Files Uploaded' section with an empty text box. At the bottom of the panel are three buttons: 'Previous', 'Submit', and 'Exit'.

Upload Files and Submit Panel

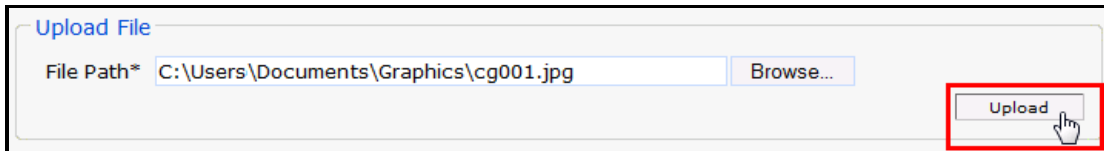
To upload files if necessary, complete the following steps:

- a. Click **Browse**.
The Choose file window will be displayed.



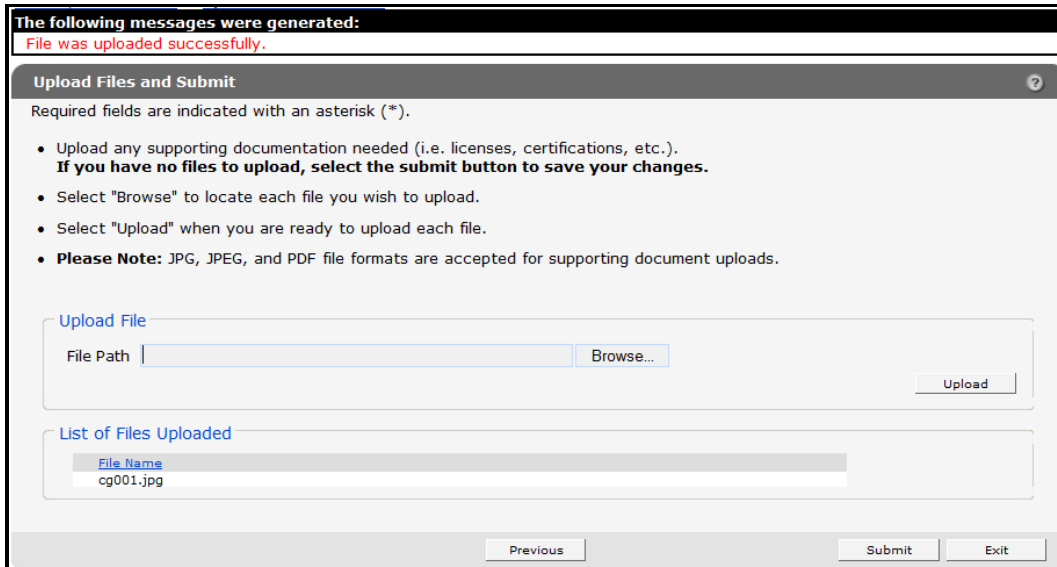
Choose File Window

- b. Navigate to the appropriate computer or network location and select the file to be uploaded.
- c. Click **Open**.
The Choose File window will close and the file path will be displayed in the File Path field.
- d. Click **Upload**.



Upload File Section

The uploaded file will be displayed in the "List of Files Uploaded" section at the bottom of the panel, and a confirmation message will be displayed above the panel.

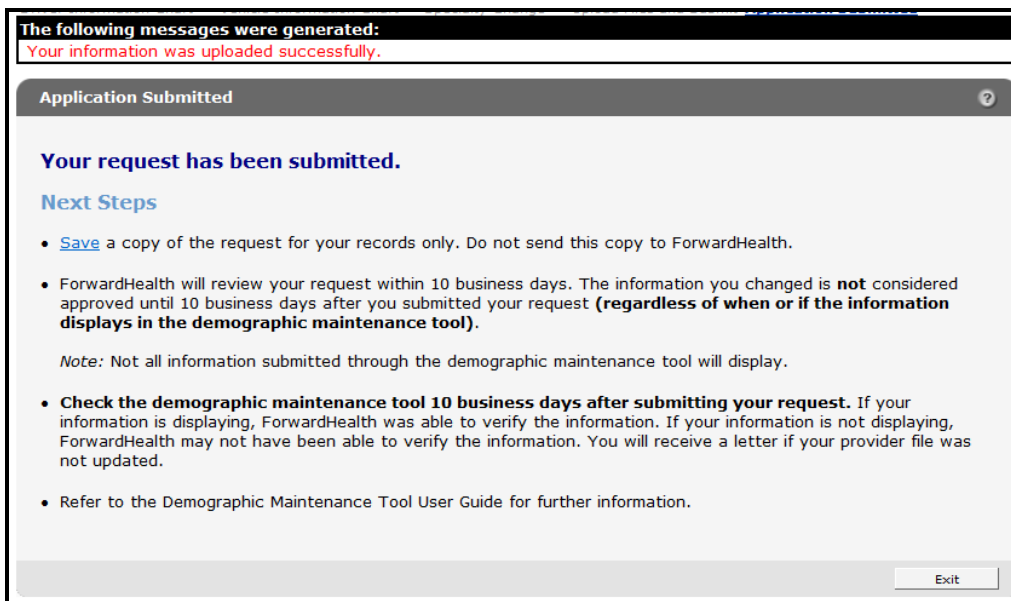


File Uploaded Successfully

2. Upload as many files as necessary.
3. Click **Submit** to submit the change(s).

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

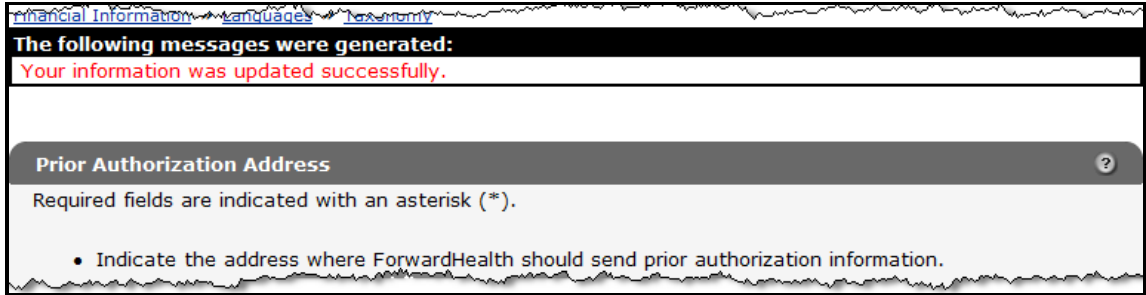
If ForwardHealth needs to review the entered information, the Application Submitted panel will display the following message: "Your information was uploaded successfully." ForwardHealth will verify the entered information and, once the information is verified, update the provider's file, if applicable.



Application Submitted Panel

4. Click **Save** to view and print a Provider Change of Address or Status form indicating the changes made in the demographic maintenance tool.
5. Click **Exit** to return to the secure Provider page.

If there are no problems with the submission and the entered information is updated automatically, the Application Submitted panel will display the following message, "Your information was updated successfully."



Confirmation Message