ForwardHealth Portal

Demographic Maintenance Tool User Guide

Date Last Updated: July 28, 2014

Table of Contents

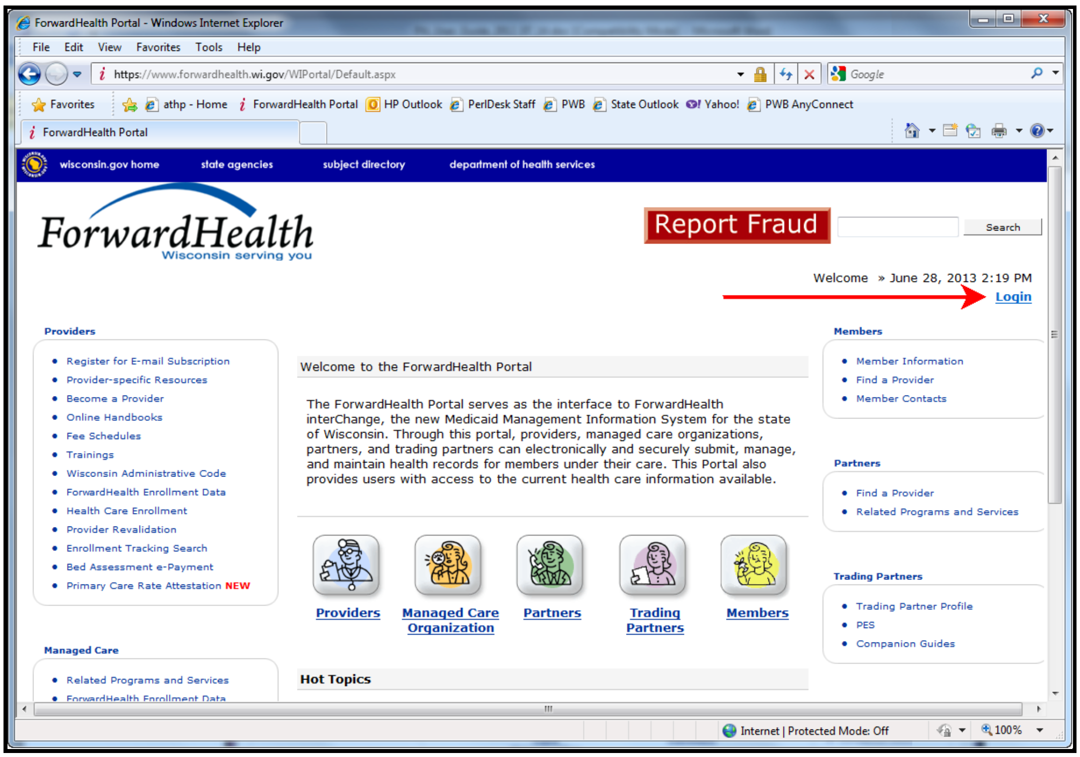
1 Access the Demographic Maintenance Tool

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.

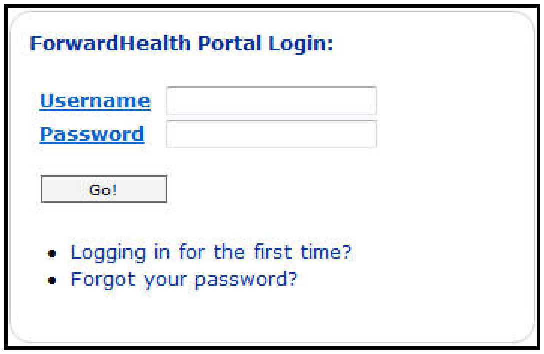
1. Access the ForwardHealth Portal at *https://www.forwardhealth.wi.gov/*.



ForwardHealth Portal Home Page

2. Click **Login**.

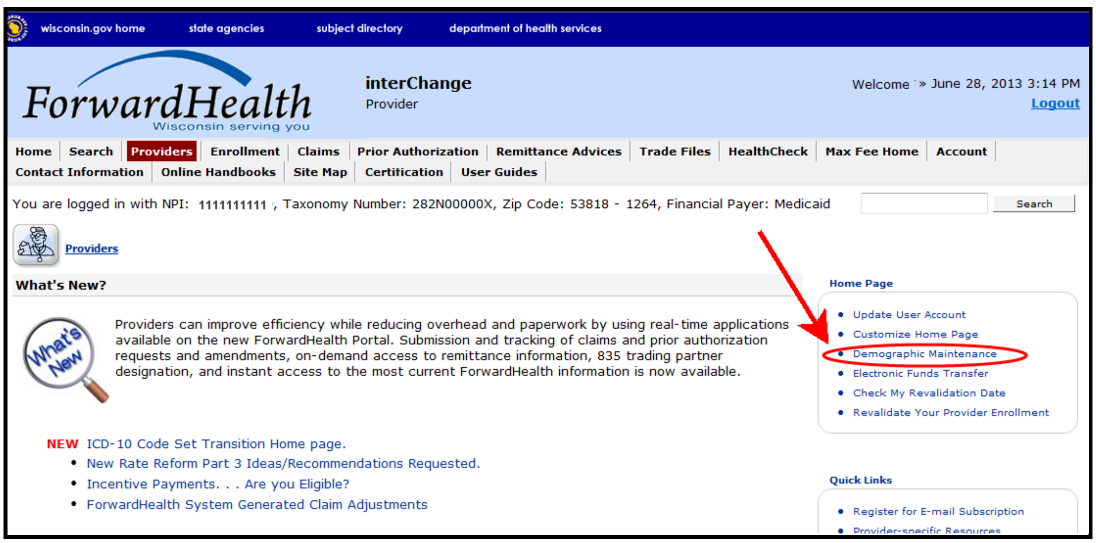
   The ForwardHealth Portal Login box will be displayed.



ForwardHealth Portal Login

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

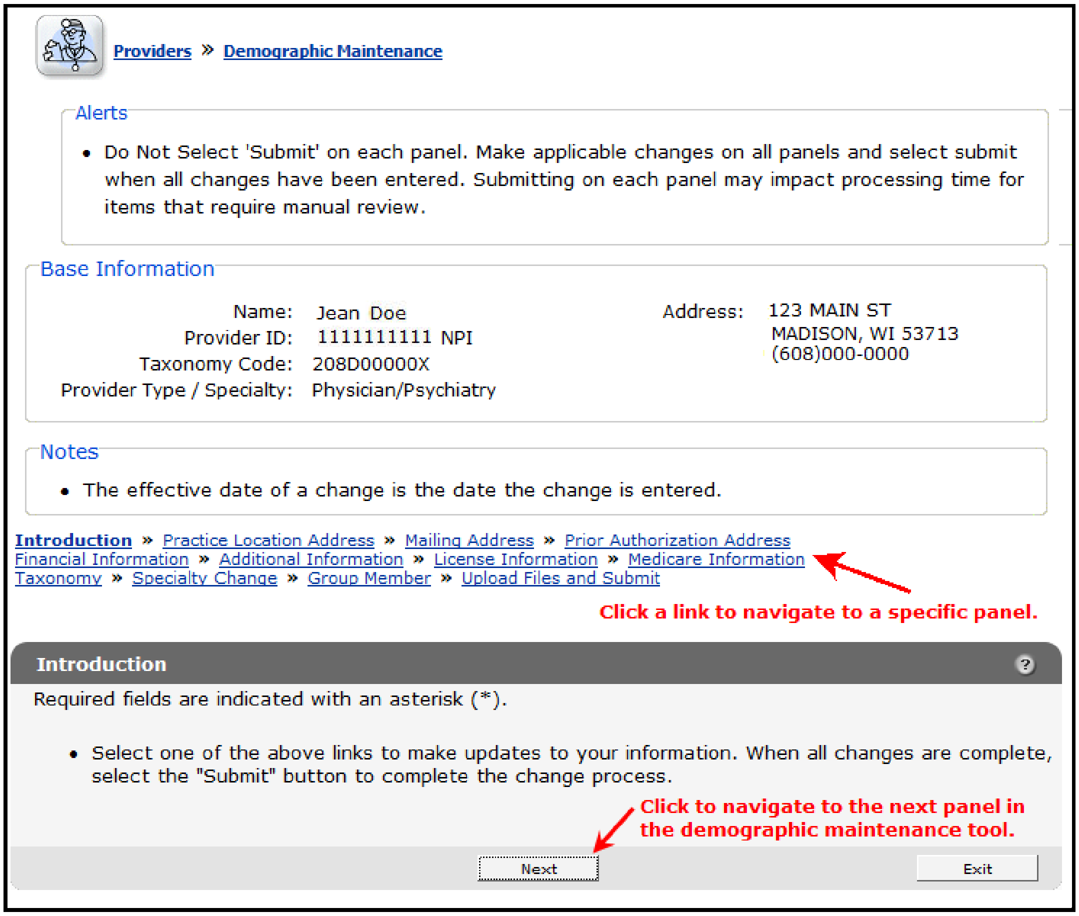
   The secure Provider page will be displayed.



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.



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.

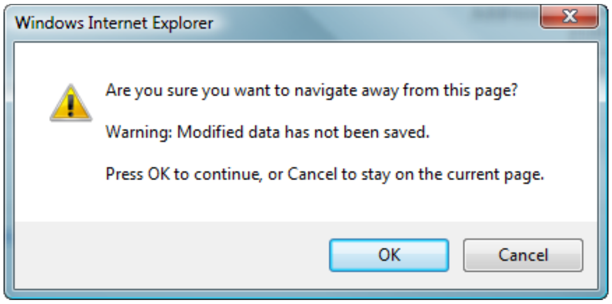
To navigate the demographic maintenance tool, either click the buttons at the bottom of the demographic maintenance tool panels, or click a link above the displayed panel to navigate to a specific panel.

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*.

7. 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**.

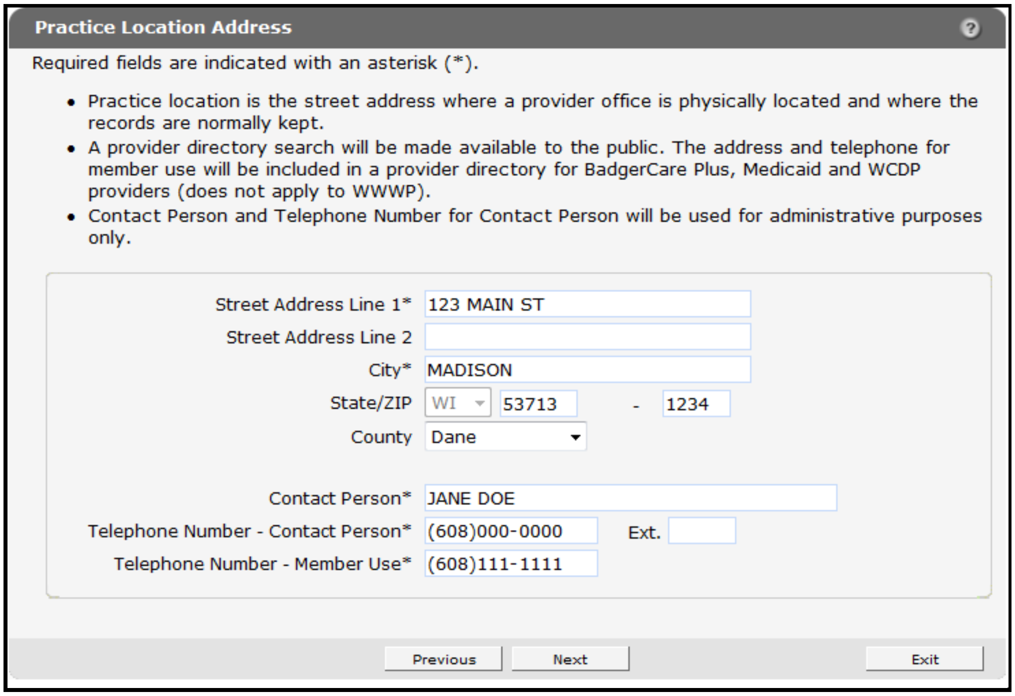
To continue *without* submitting the modified information, click **OK**.

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 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.

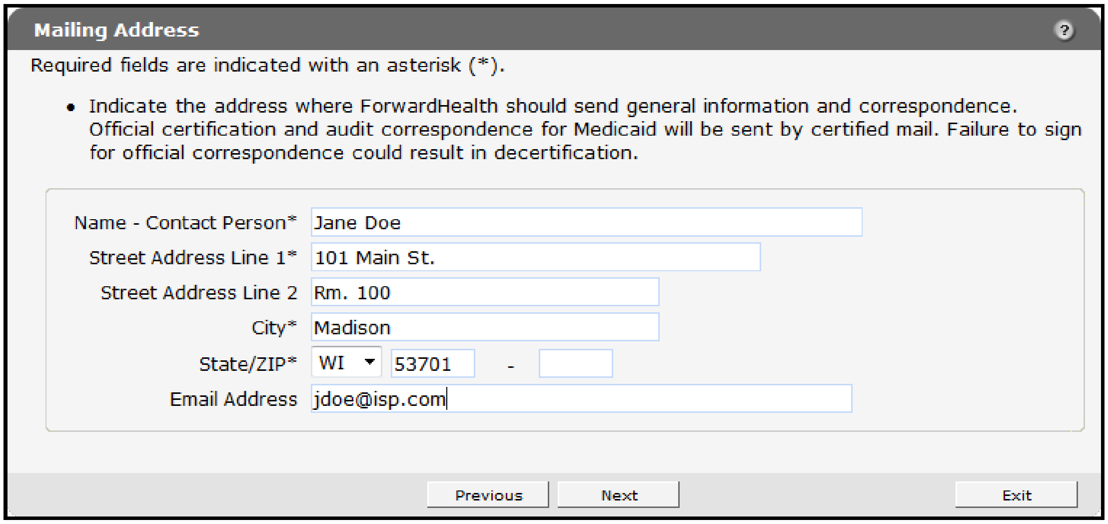
If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

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 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.

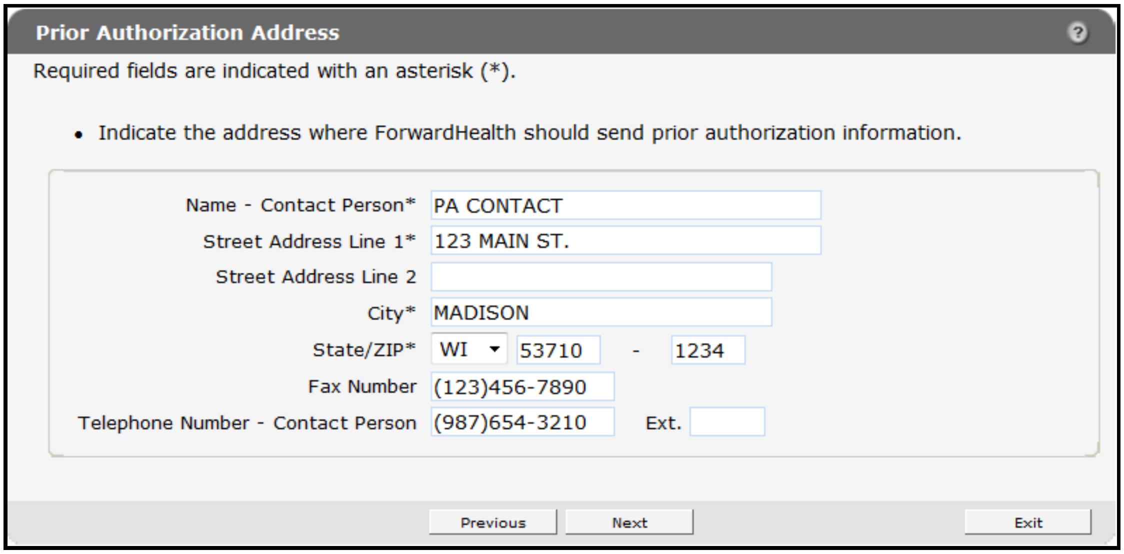
If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

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 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.

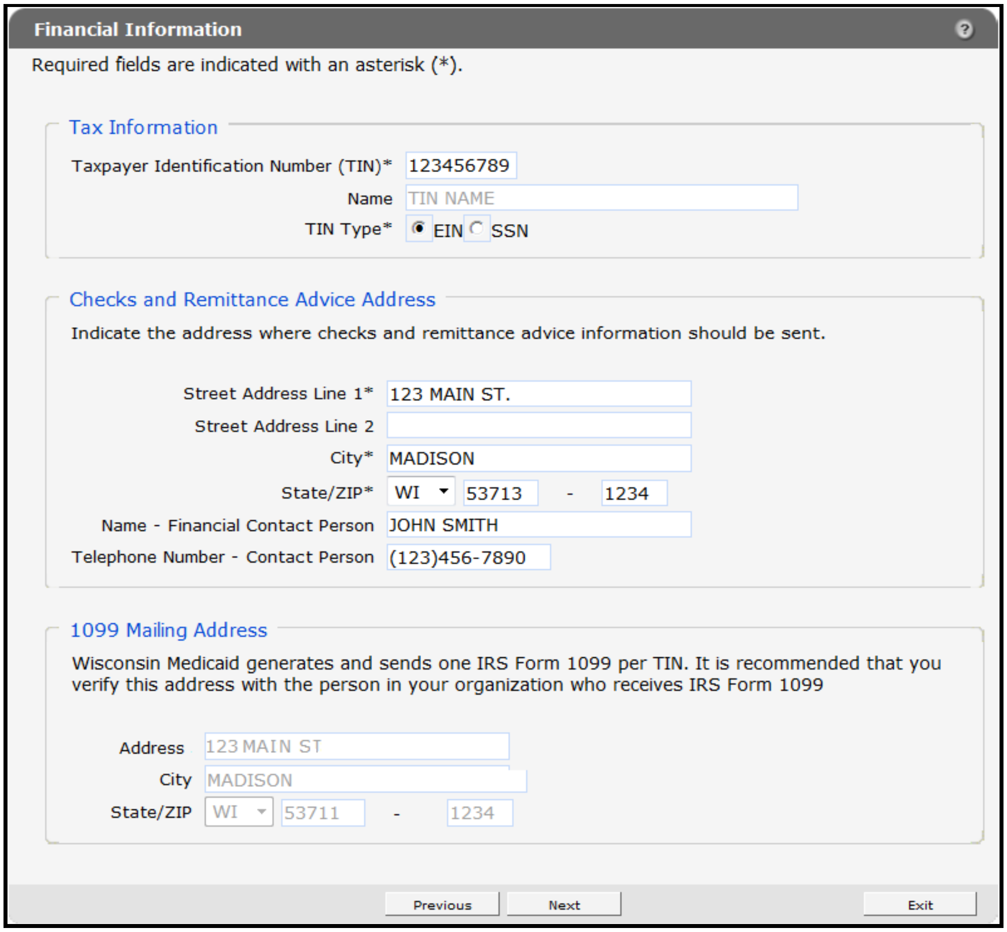
If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

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.



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.

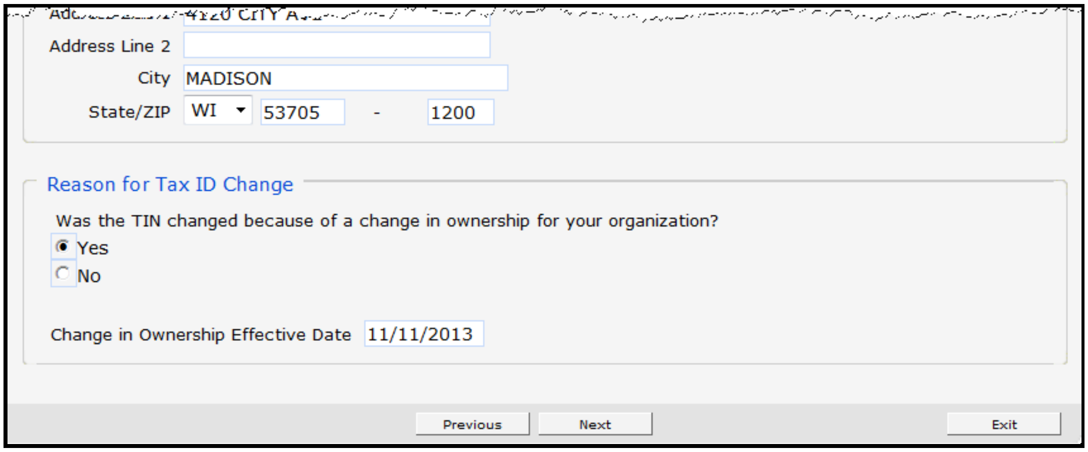
3. When finished entering information, one of three options may be chosen:
   - Click **Next** to go to the next panel on the list.
   - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
   - Click the **Upload Files and Submit** link above 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.



Reason for Tax ID Change Section (Financial Information Panel)

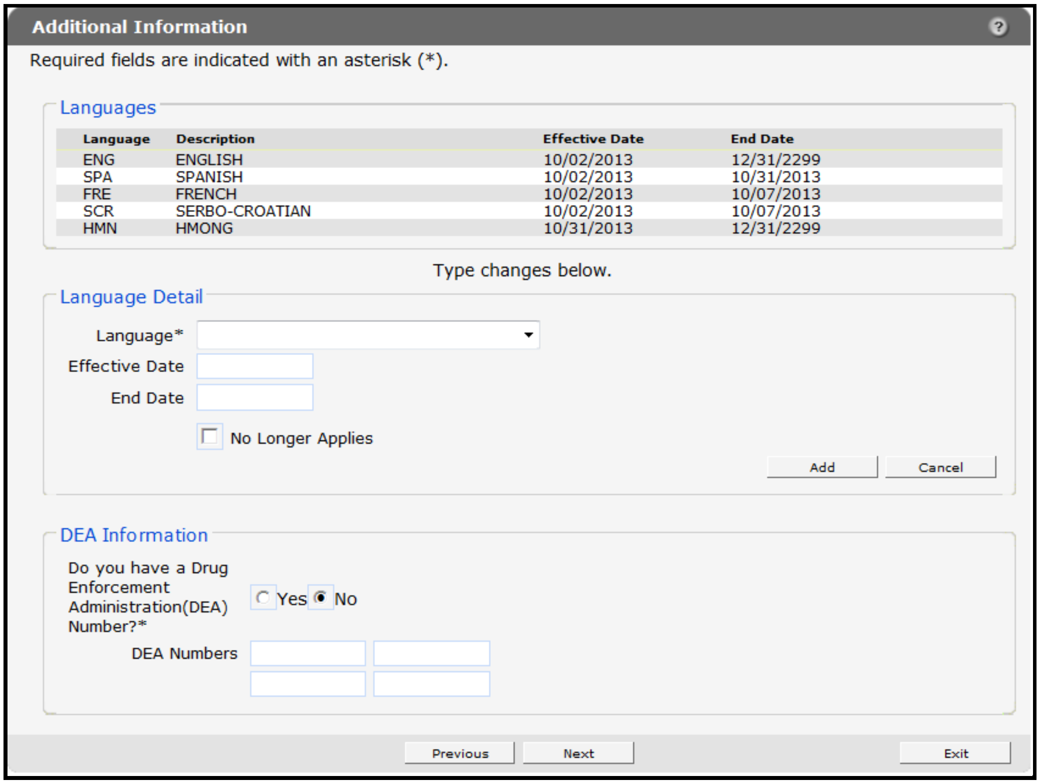
Organizations that change the TIN number on the Financial Information panel are required to enter information on this panel.

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.



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.

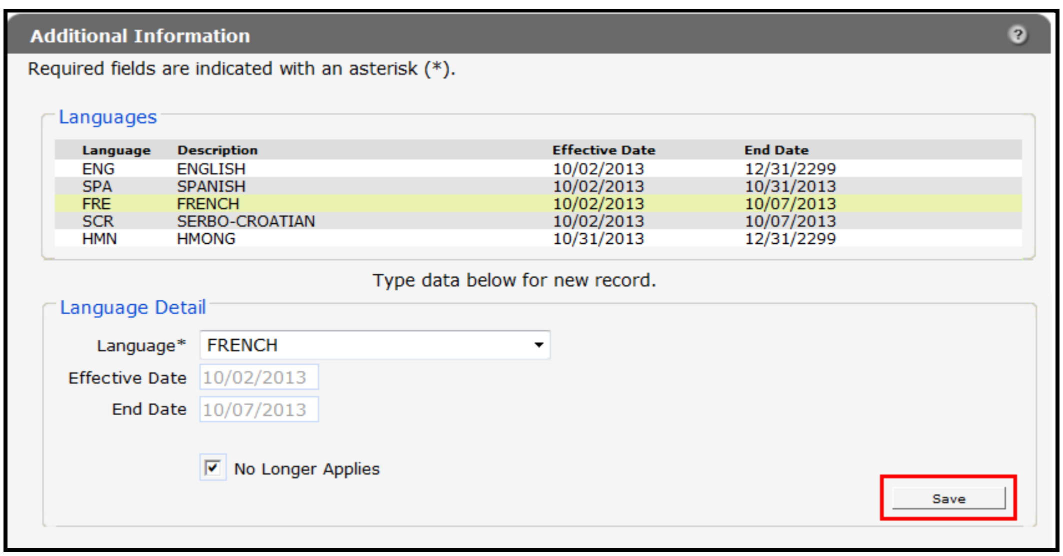
6.2 End Date a Language

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.



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.

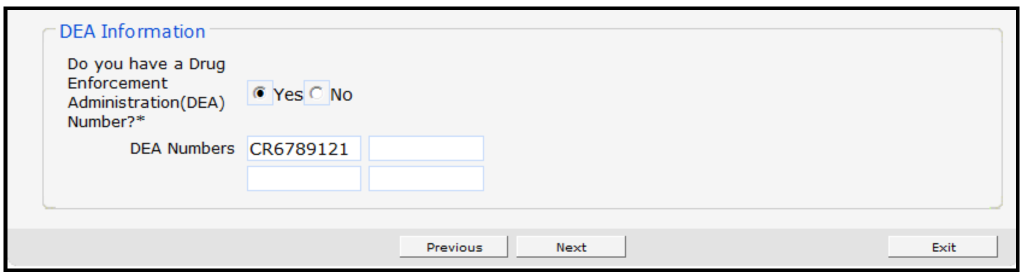
Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

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.

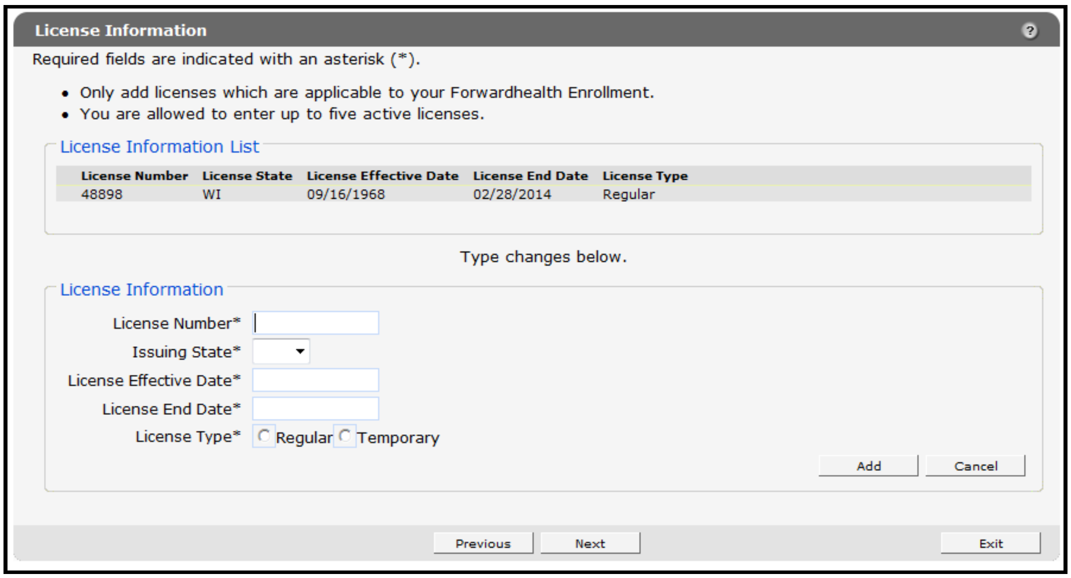
If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

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 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.

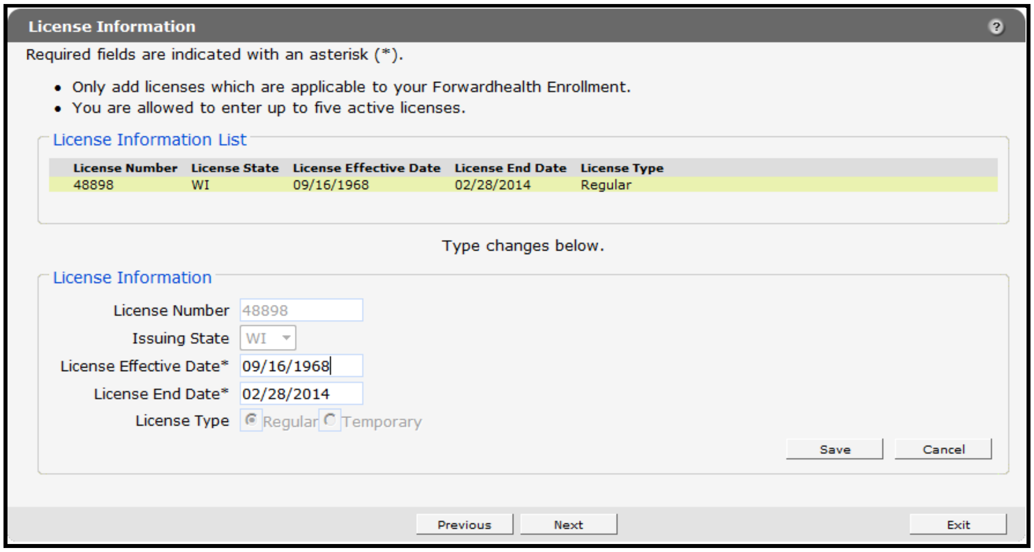
Providers may have a maximum of five active licenses applicable to the provider's type of enrollment. All license effective dates and end dates will be verified through applicable state licensing boards prior to being added to the provider's file. If the provided dates do not correspond with the dates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

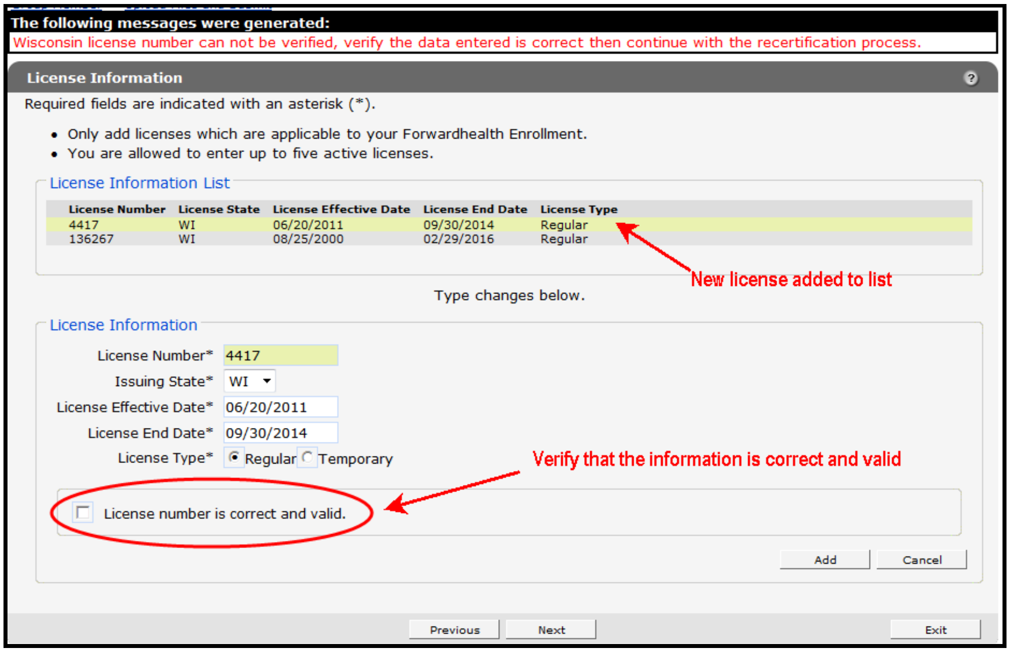
If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

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.



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.

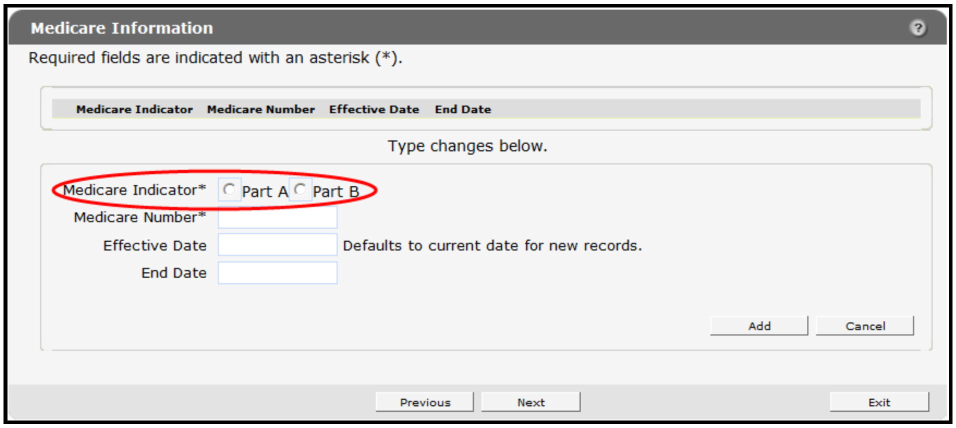
If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

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.

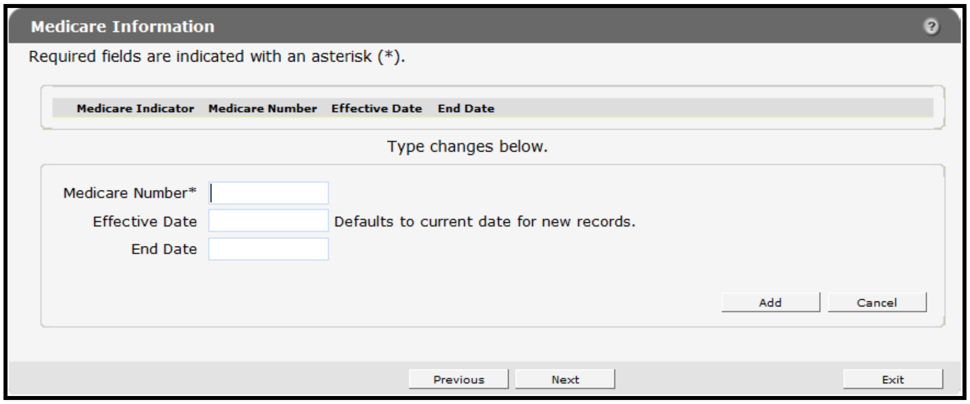
1. Click **Medicare Information** from the navigation links above the current panel.

   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.

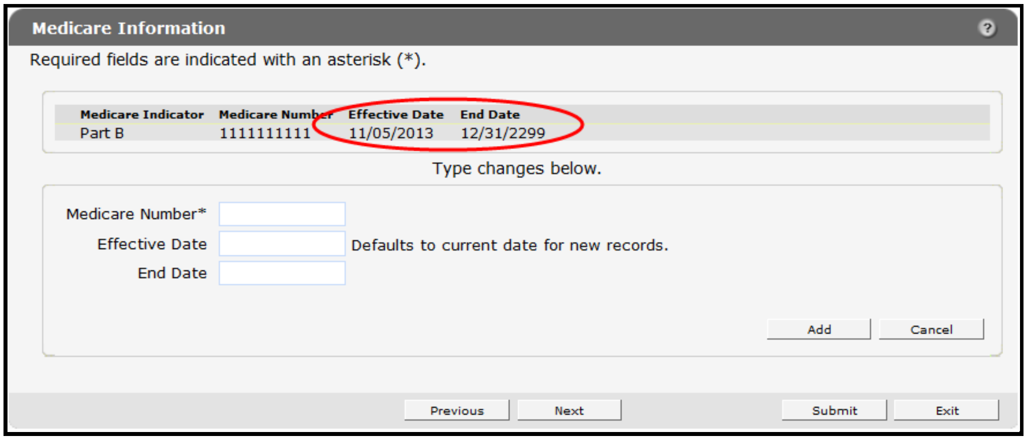


Medicare Information Panel Individual

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 Number Added

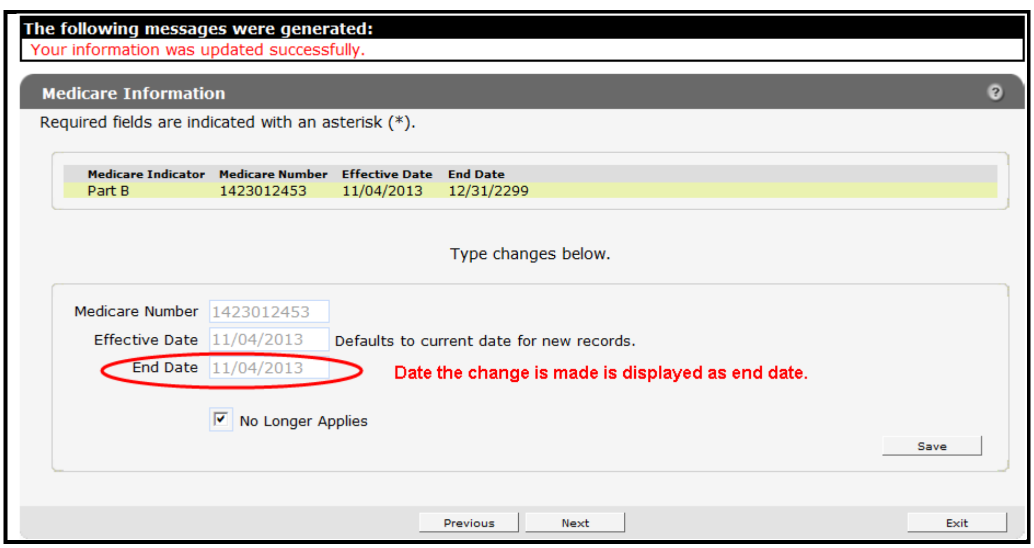
8.1 End Date a Medicare Number

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**.



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.

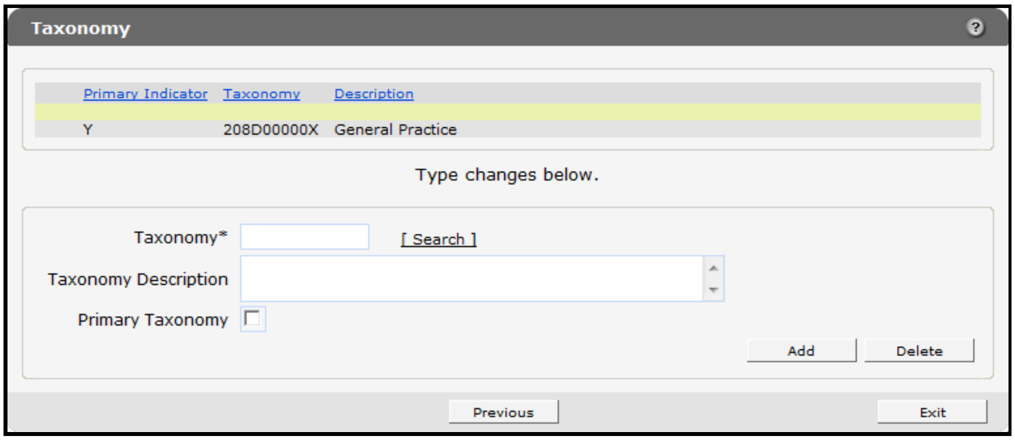
9 Taxonomy Panel

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.



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:

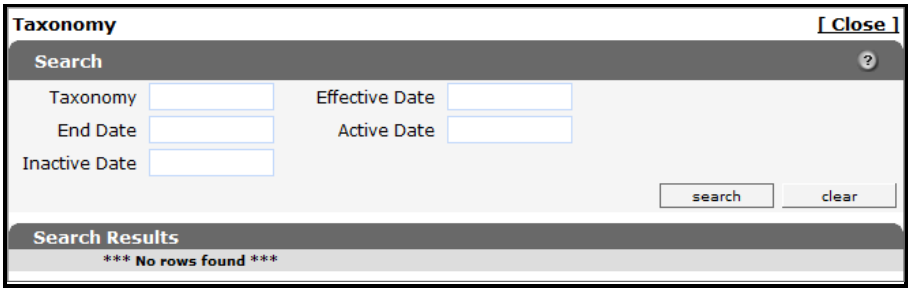
1. Enter the new taxonomy code in the Taxonomy field or use the search link to search for the code.

   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.

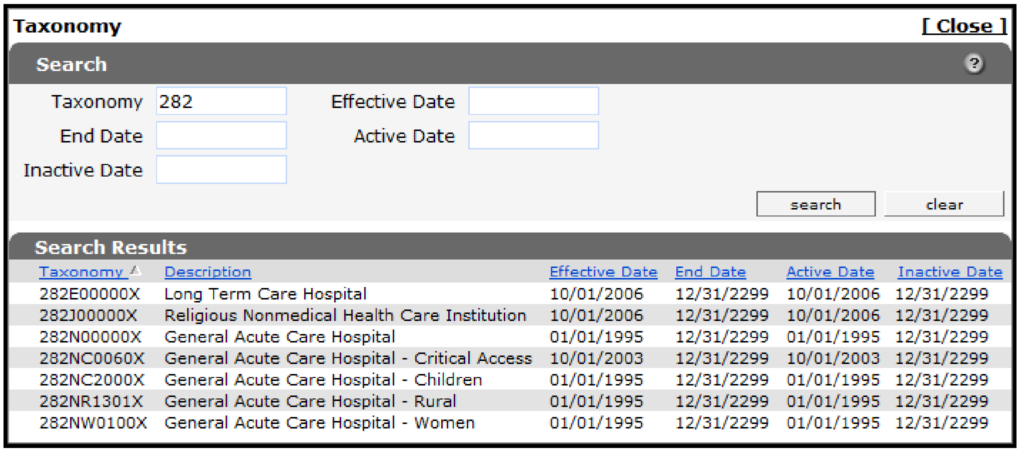


Taxonomy Search Box

b. Enter information in any of the search fields. To narrow the results, enter as much information as possible.

c. Click **Search**.

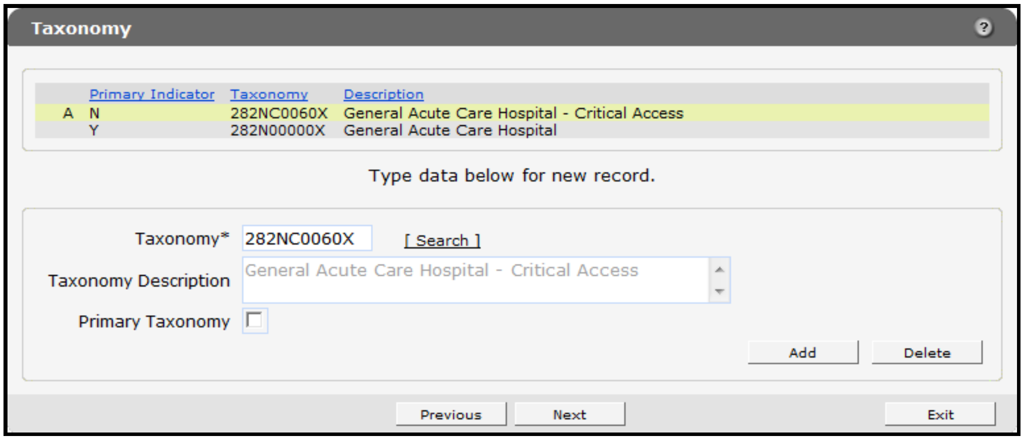
The results will be displayed in the “Search Results” section.



Search Results Section

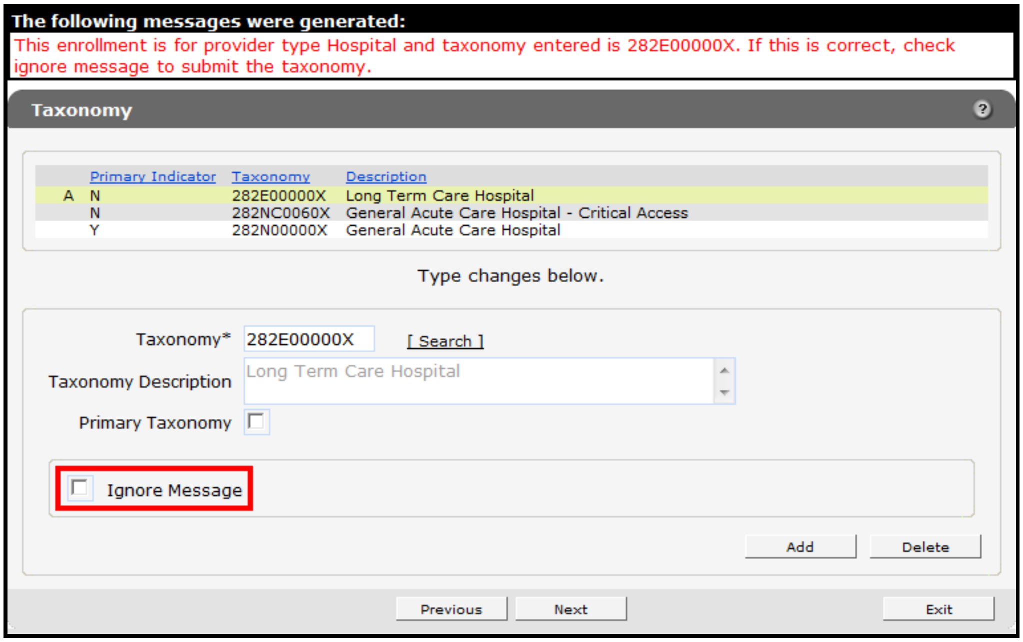
d. Select the applicable taxonomy code.

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 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.



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.

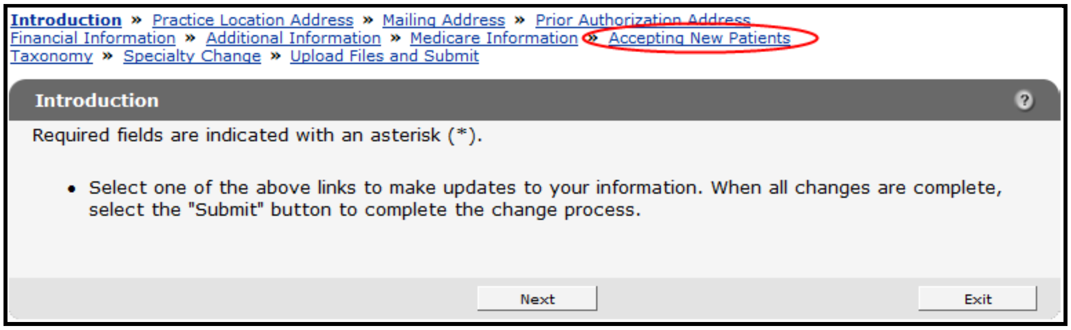
Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

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.

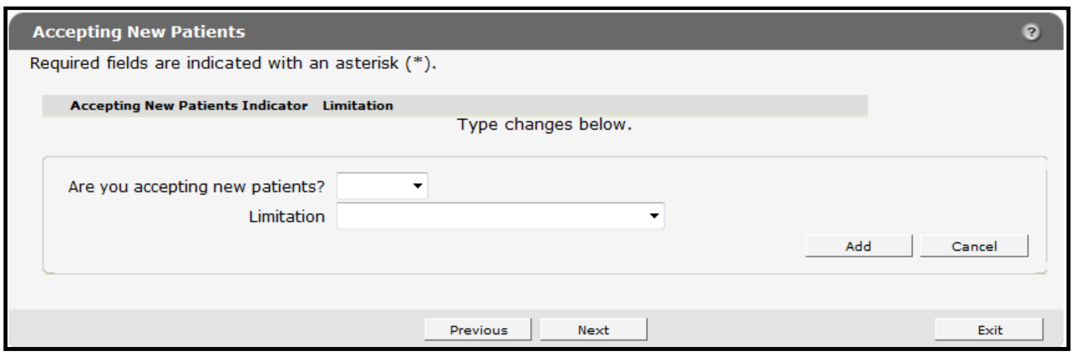
The link for the Accepting New Patients panel is only available to dental providers.



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.



Accepting New Patients Panel

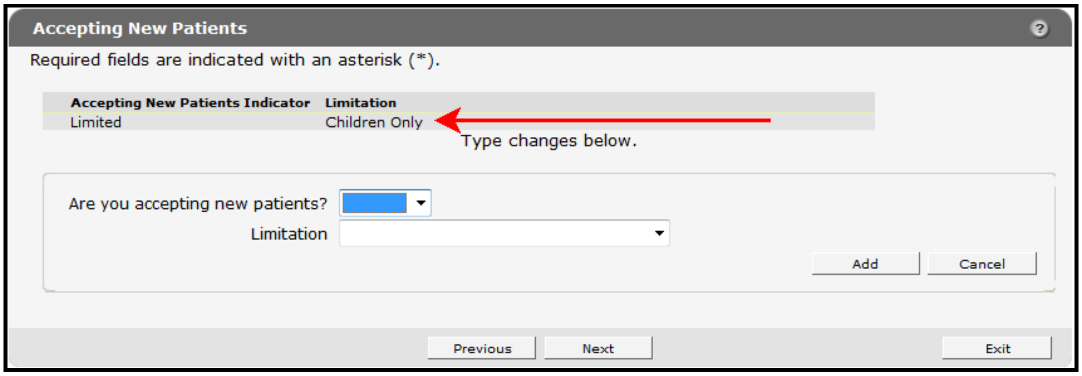
10.1 Add Information

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 Panel with Added Row

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.

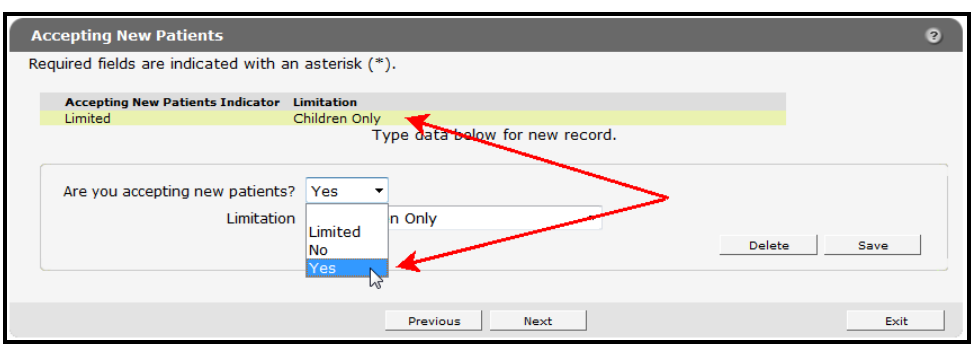
10.2 Change Information

To change information, complete the following steps:

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

   The selected information will populate the fields on the panel.

2. Change the necessary information.

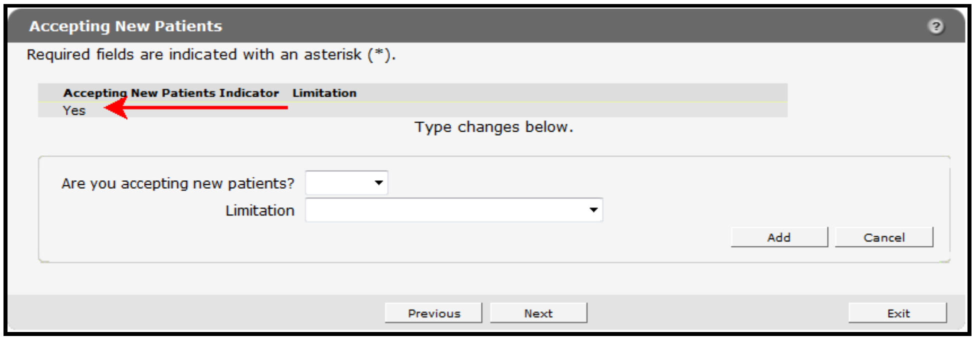


Selections to Change Information

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.

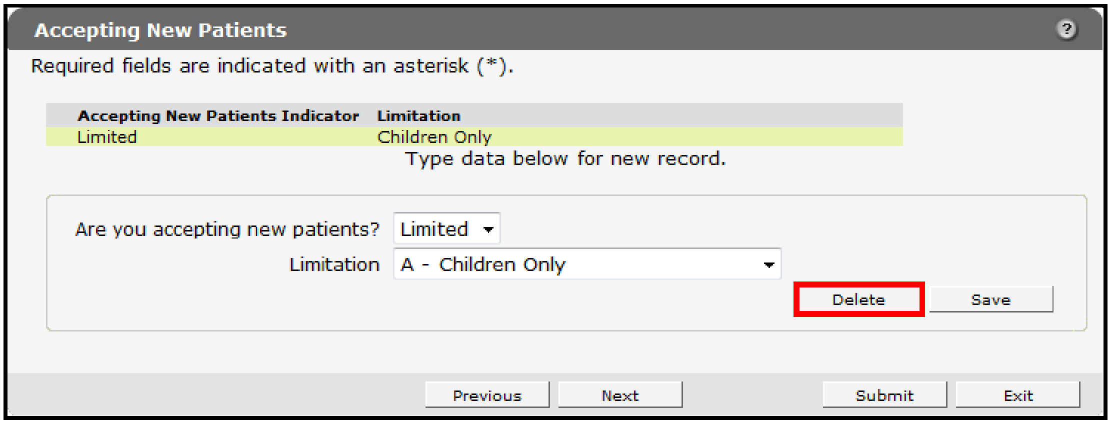
If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

10.3 Delete Information

To delete information, complete the following steps:

1. Select the row to be deleted.

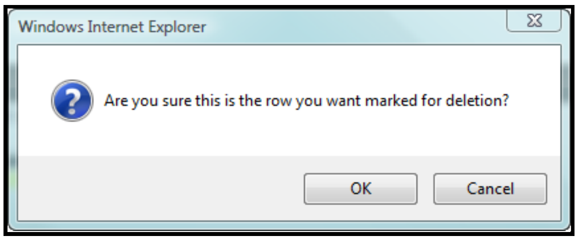
   The selected information will populate the fields on the panel.



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.

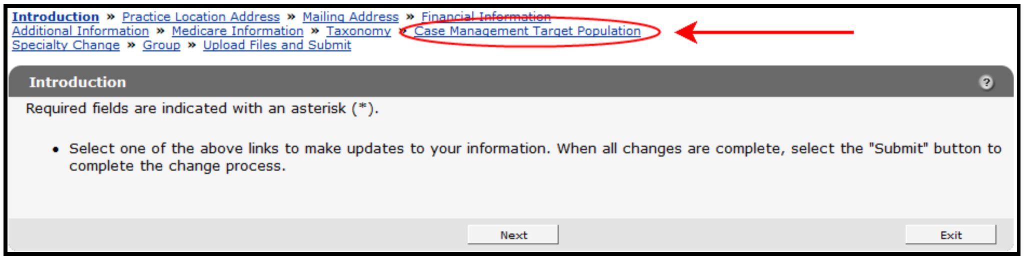
4. When finished entering information, one of three options may be chosen:
   - Click **Next** to go to the next panel on the list.
   - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
   - Click the **Upload Files and Submit** link above 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

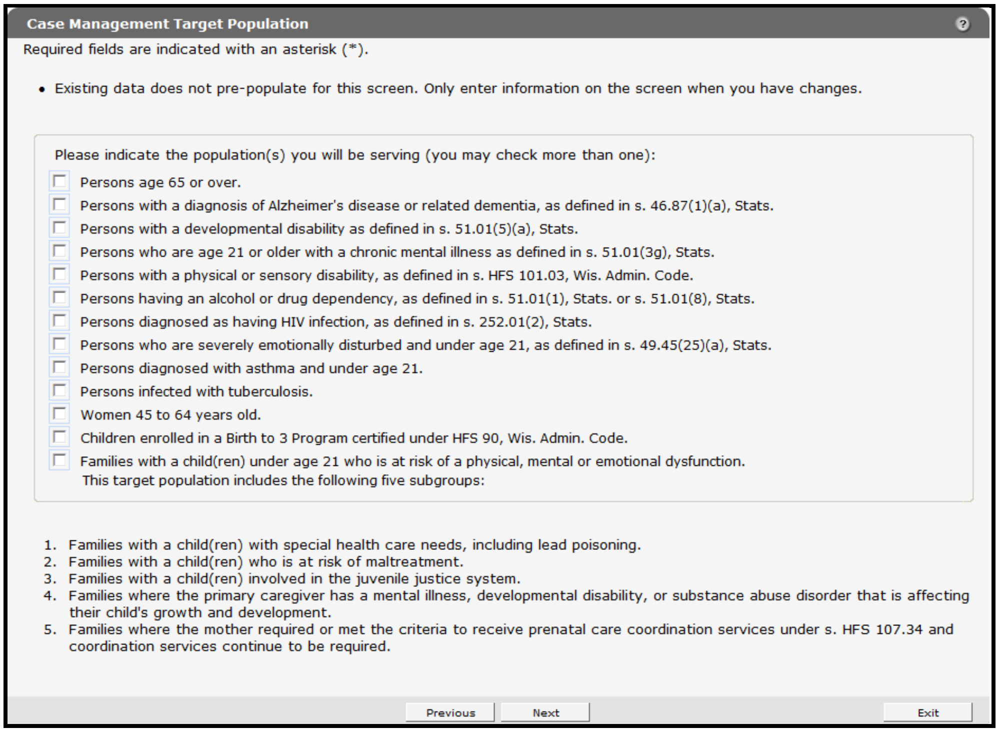
The link for the Case Management Target Population panel is only available to Case Management providers.



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.



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.

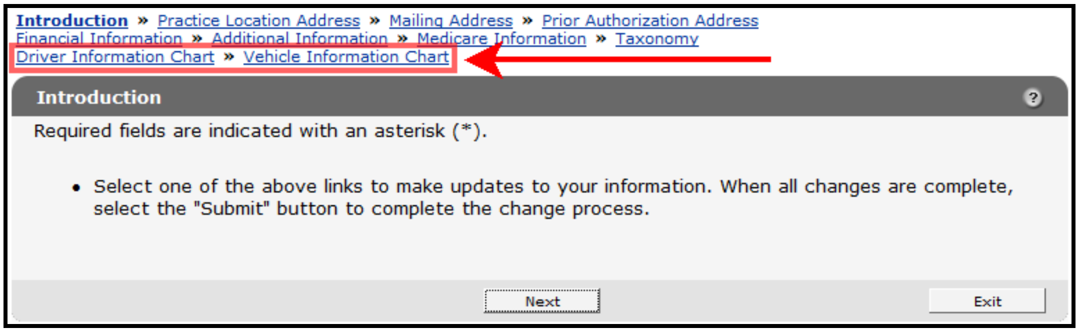
- Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
- Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the *Upload Files and Submit* section of this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

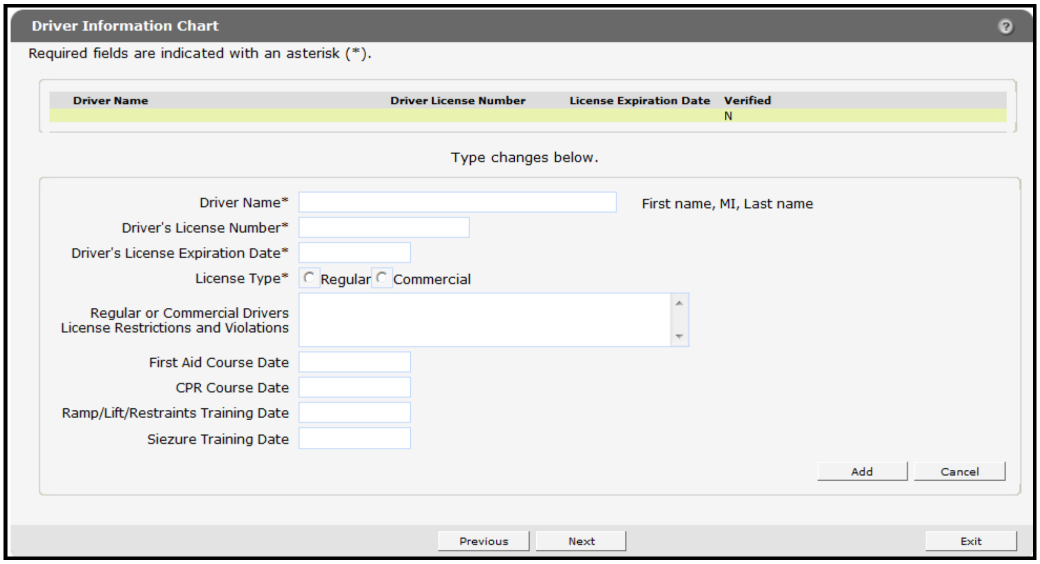
12.1 Driver Information Chart Panel

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.



Driver Information Chart Panel

12.1.1 Adding a Driver

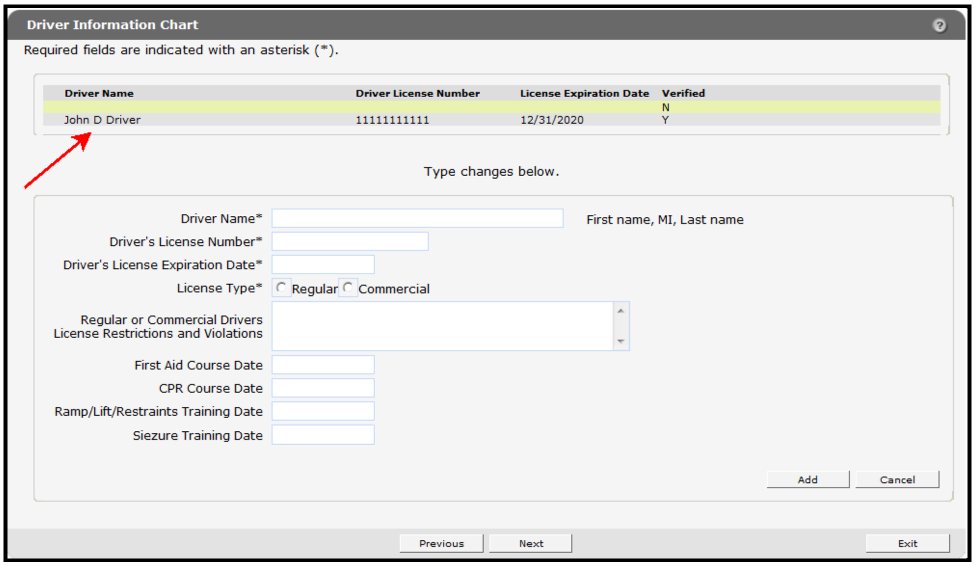
To add a driver, complete the following steps:

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.



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.

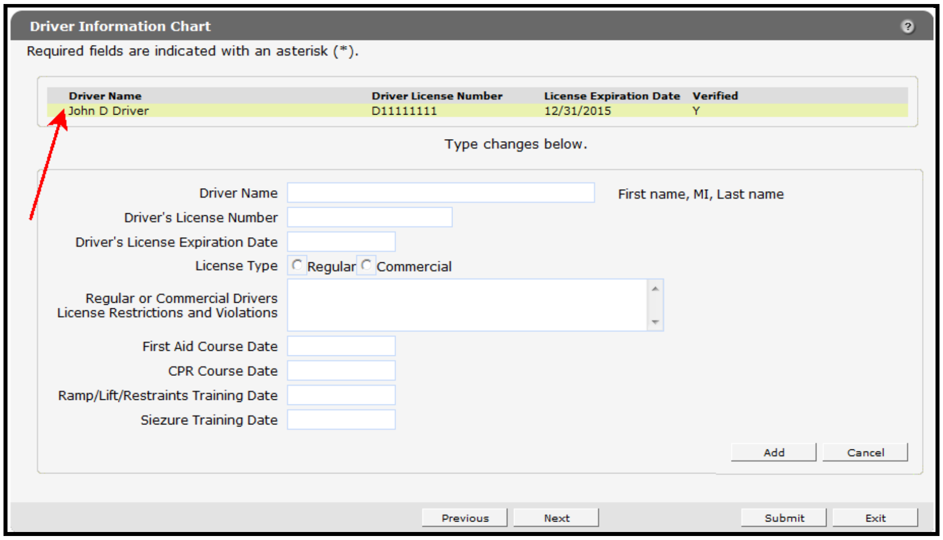
Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

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

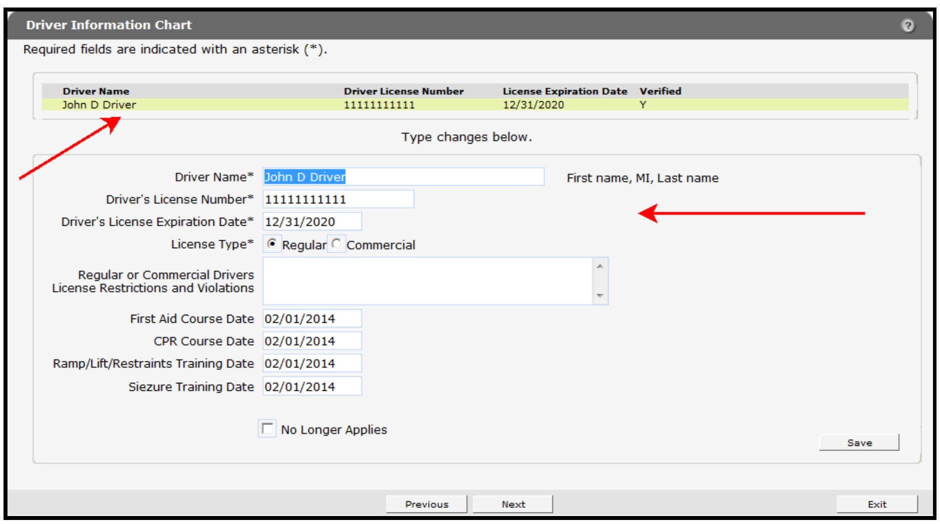
To change driver information, complete the following steps:

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



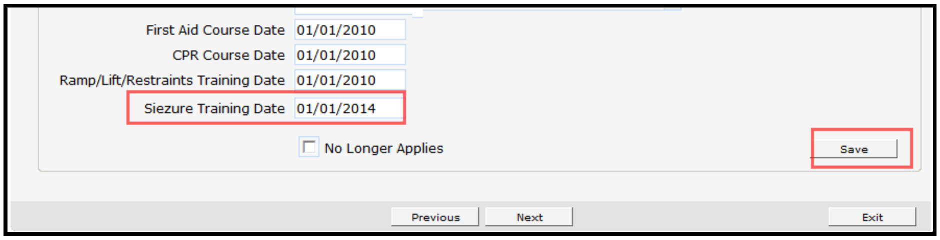
Select Driver

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



Selected Driver

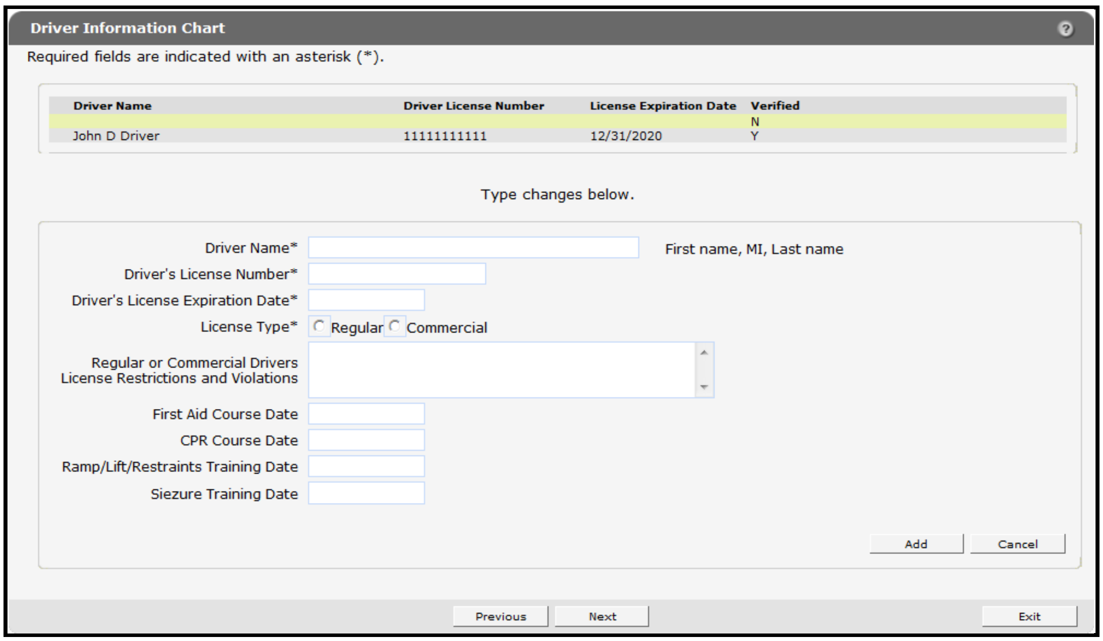
2. Change the necessary information. In this example, the Seizure Training Date is being changed.



Seizure Training Date Change

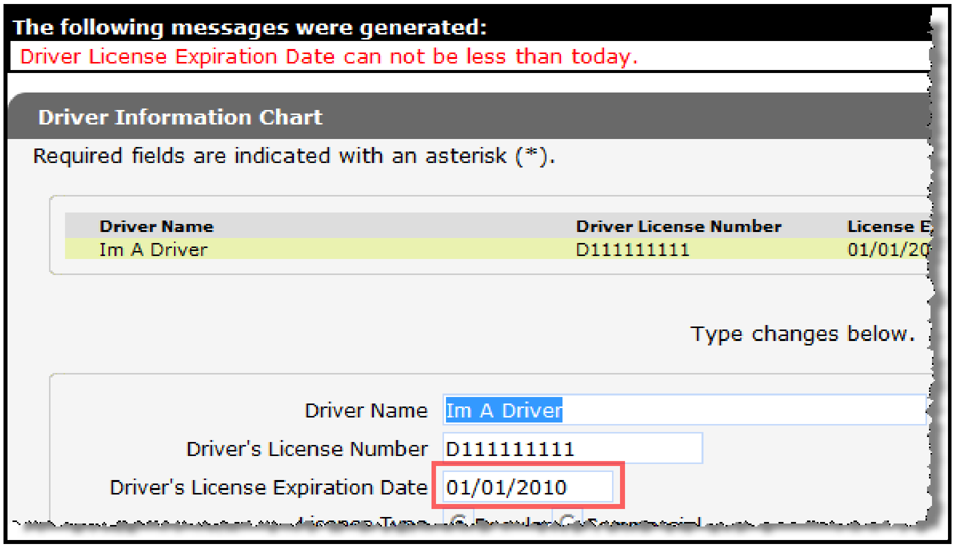
3. Click **Save**.

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



Driver Information 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.

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.

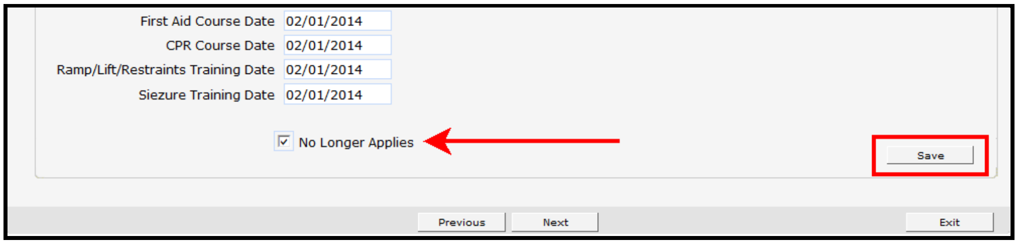
If there is a problem with the information entered an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

12.1.3 Delete a Driver

To delete a driver, complete the following steps:

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

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



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.

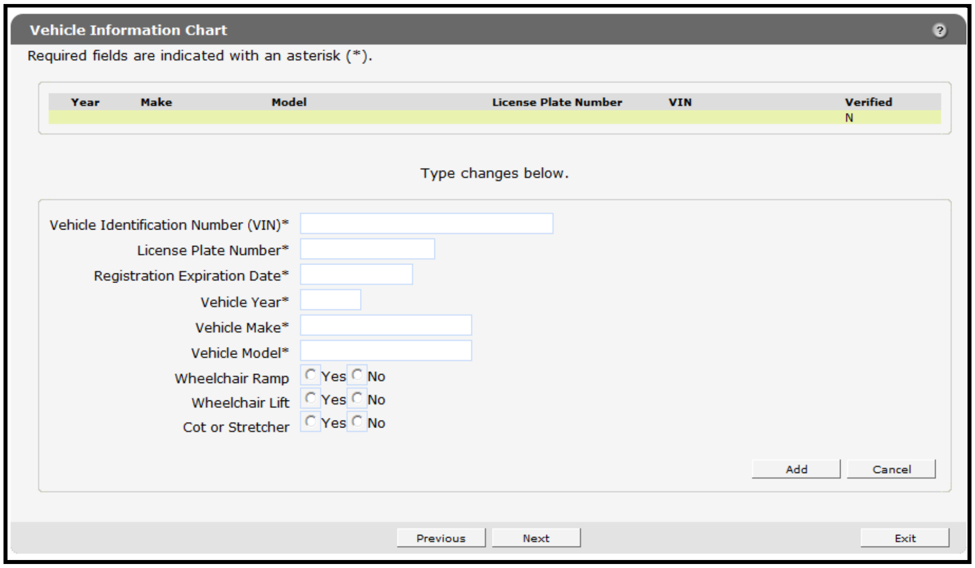
12.2 Vehicle Information Chart Panel

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.



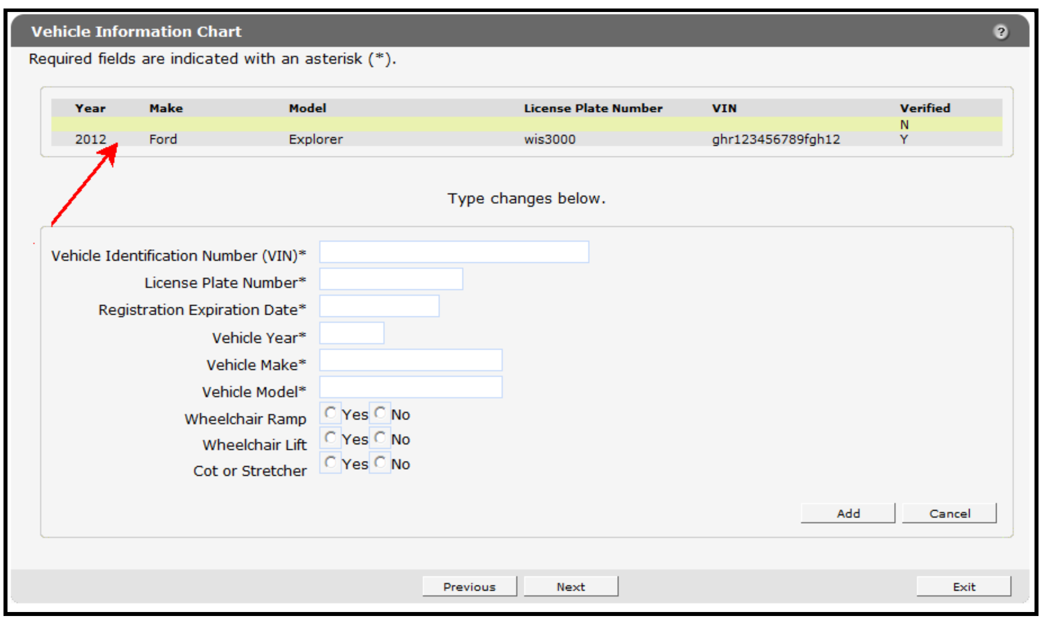
Vehicle Information Chart Panel

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.

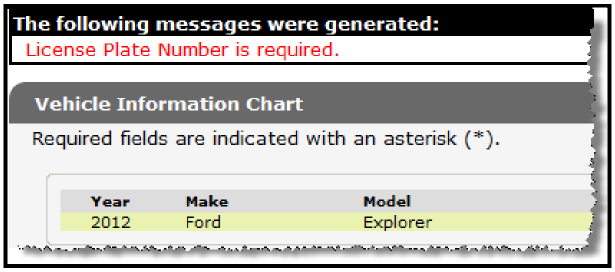


New Vehicle Added to List

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

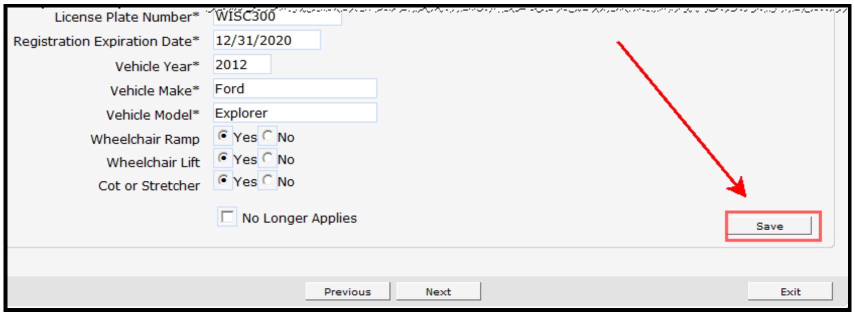
The page will refresh and the new vehicle will be added to the list at the top of the panel.

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

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.

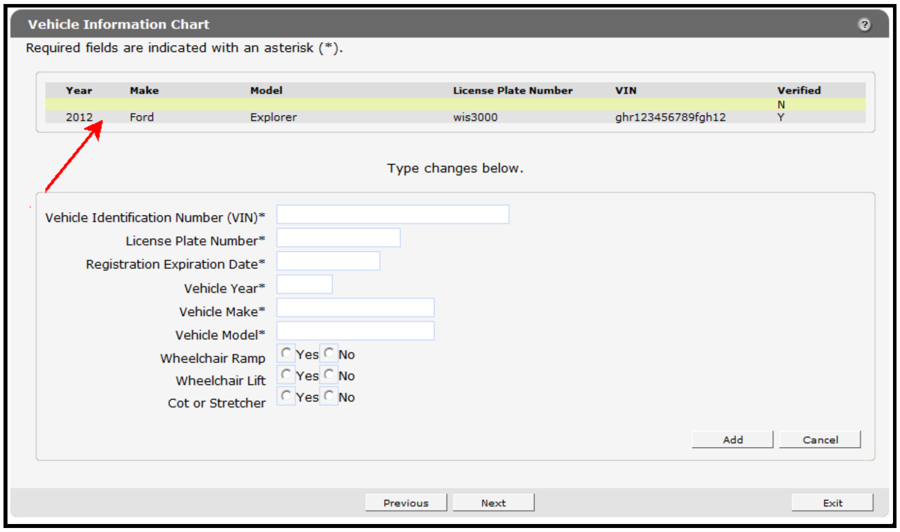
Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

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.

12.2.2 Changing Vehicle Information

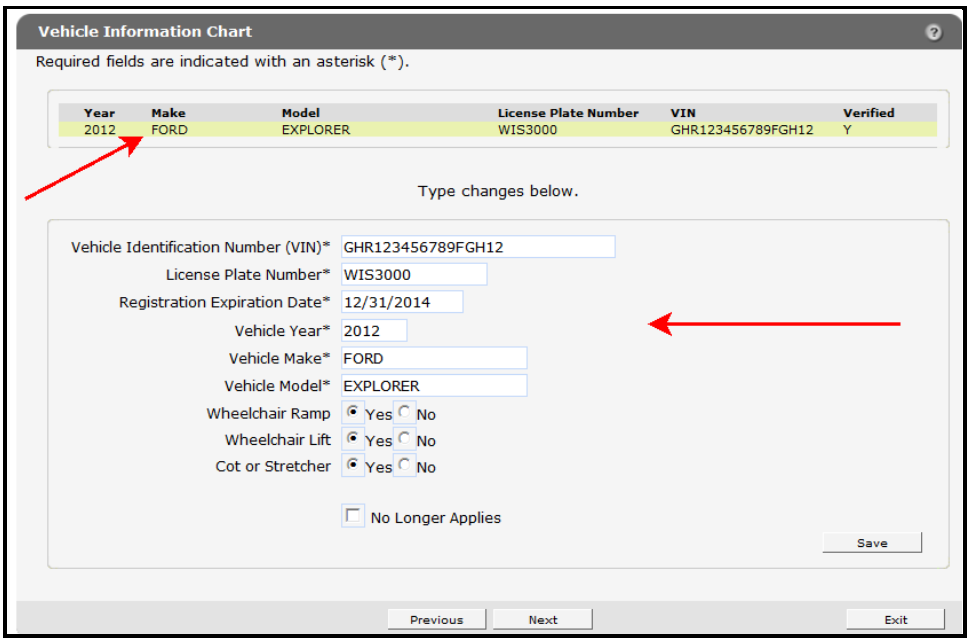
To change vehicle information, complete the following steps:

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



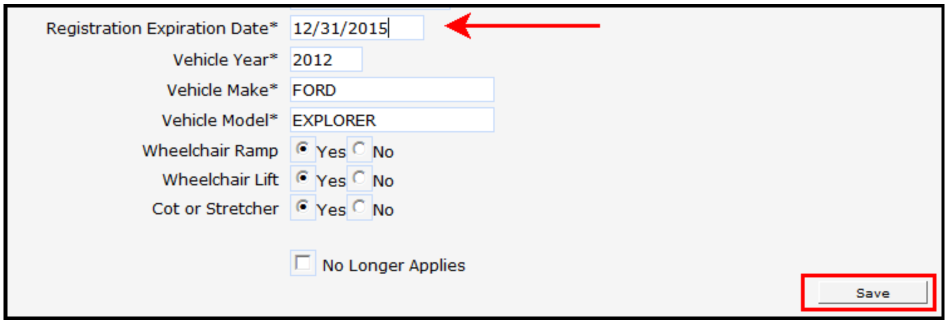
Select Vehicle

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



Vehicle Selected

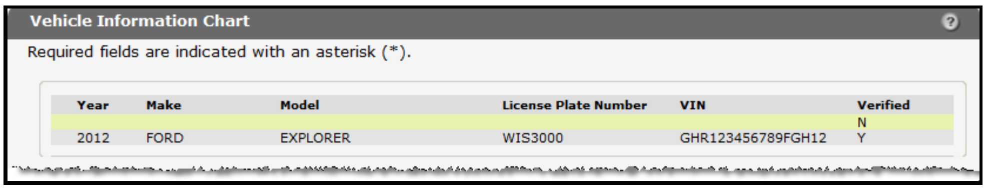
2. Change the necessary information. In this example, the Registration Expiration Date is being changed.



Seizure Training Date Change

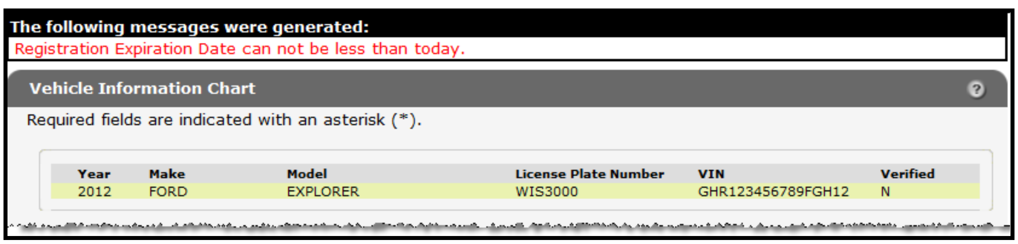
3. Click **Save**.

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



Vehicle Information Saved

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



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.

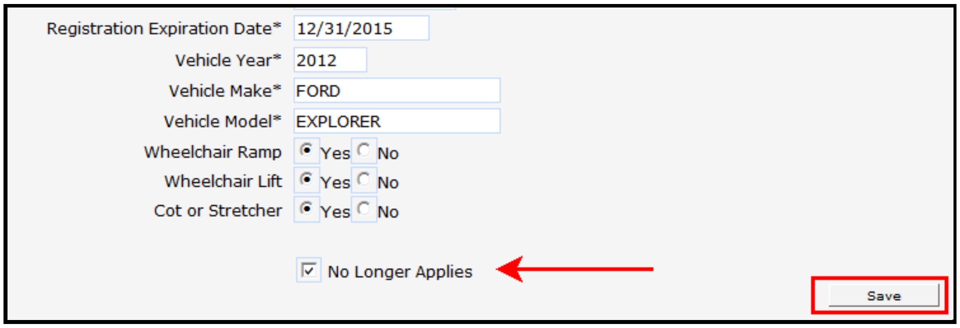
12.2.3 Delete a Vehicle

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.

   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:

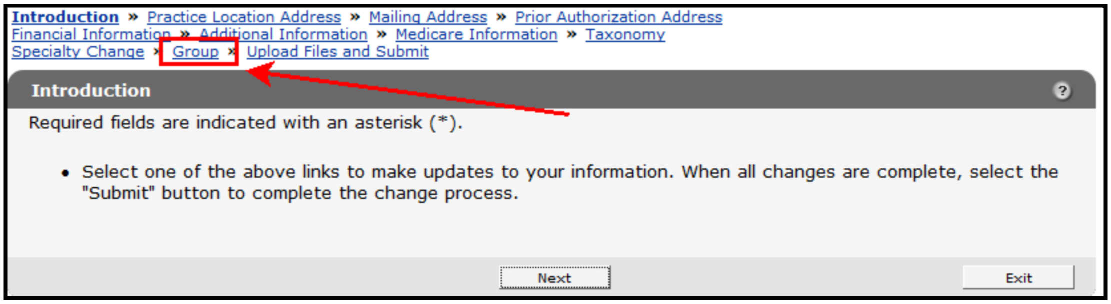
   - Click **Next** to go to the next panel on the list.
   - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
   - Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates,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

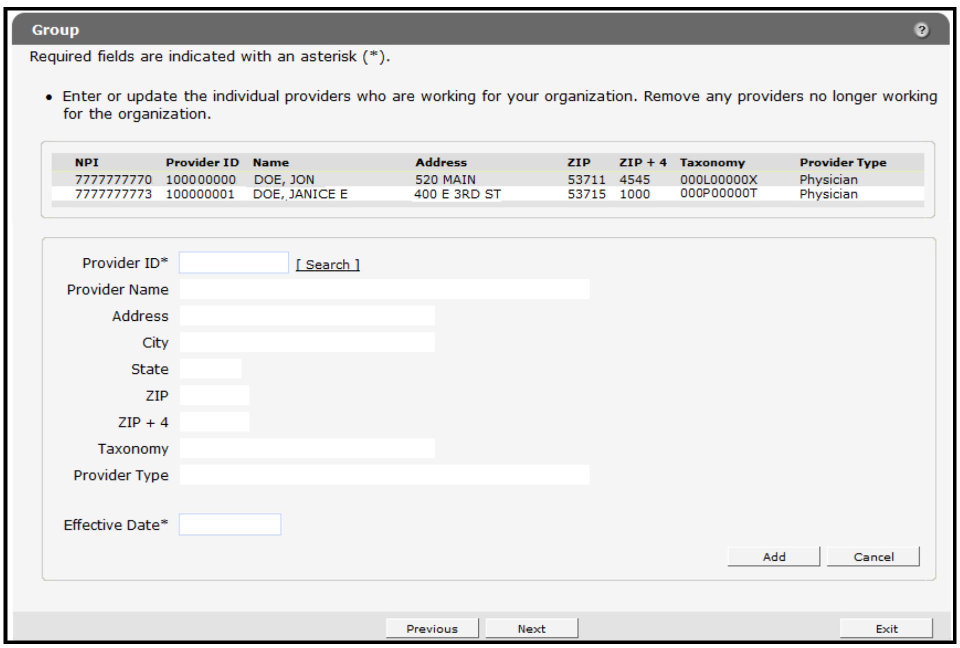
The Group panel is only available to Medicaid-enrolled organizations and clinics.



Group Link

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

   The Group panel will be displayed.



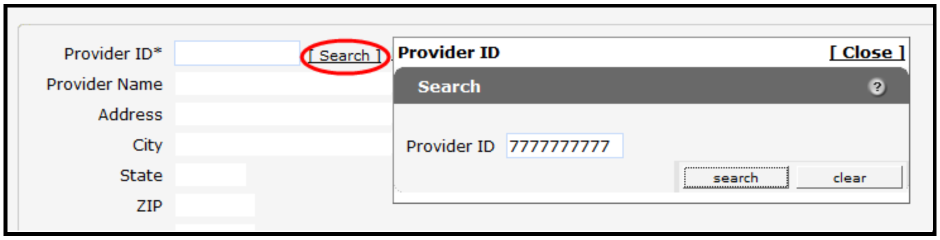
Group Panel

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.

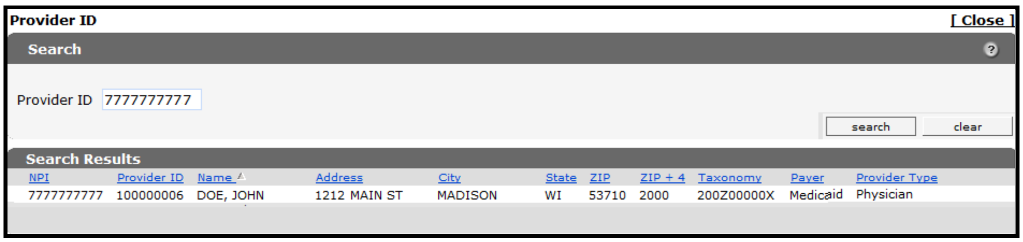
   The Provider ID Search panel will be displayed.



Provider ID Search Sub-panel

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

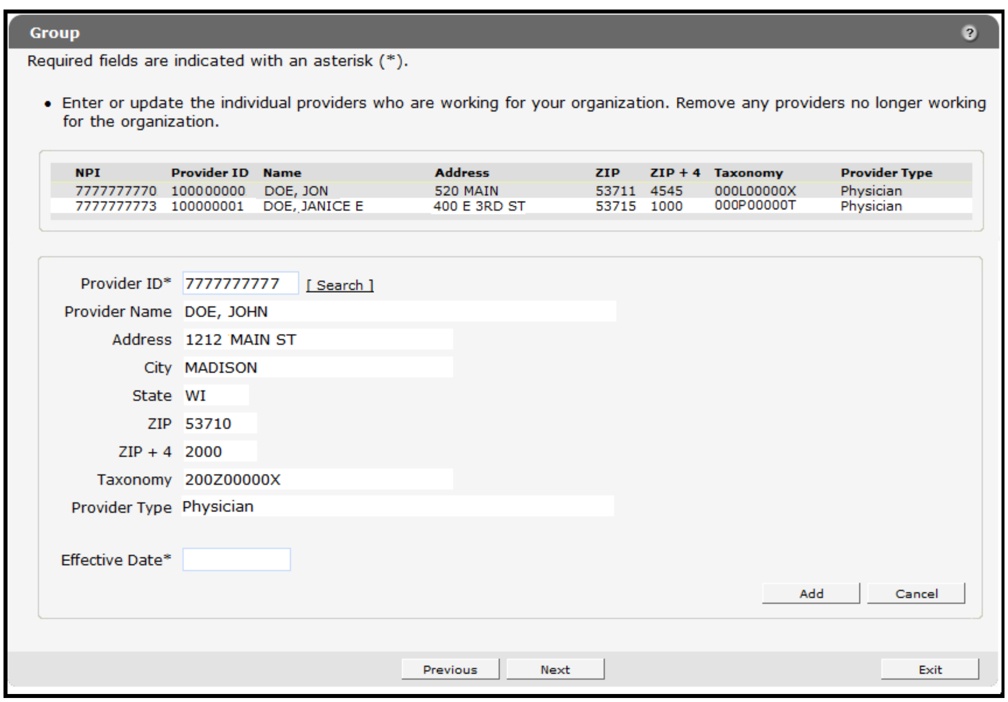
   The Provider ID Search Results panel will populate with the information for the selected provider.



Provider ID Search Results Panel

4. Click the row for the selected provider.

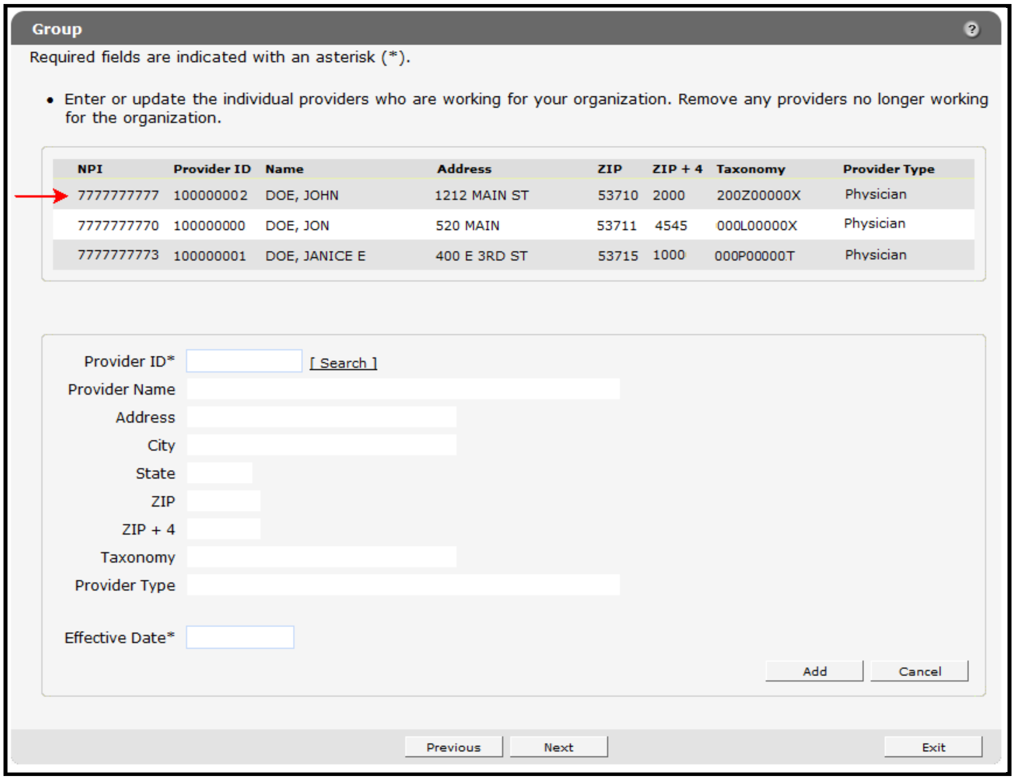
   The Search Results panel will close and the fields on the Group panel will populate with the provider's information.



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.



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.

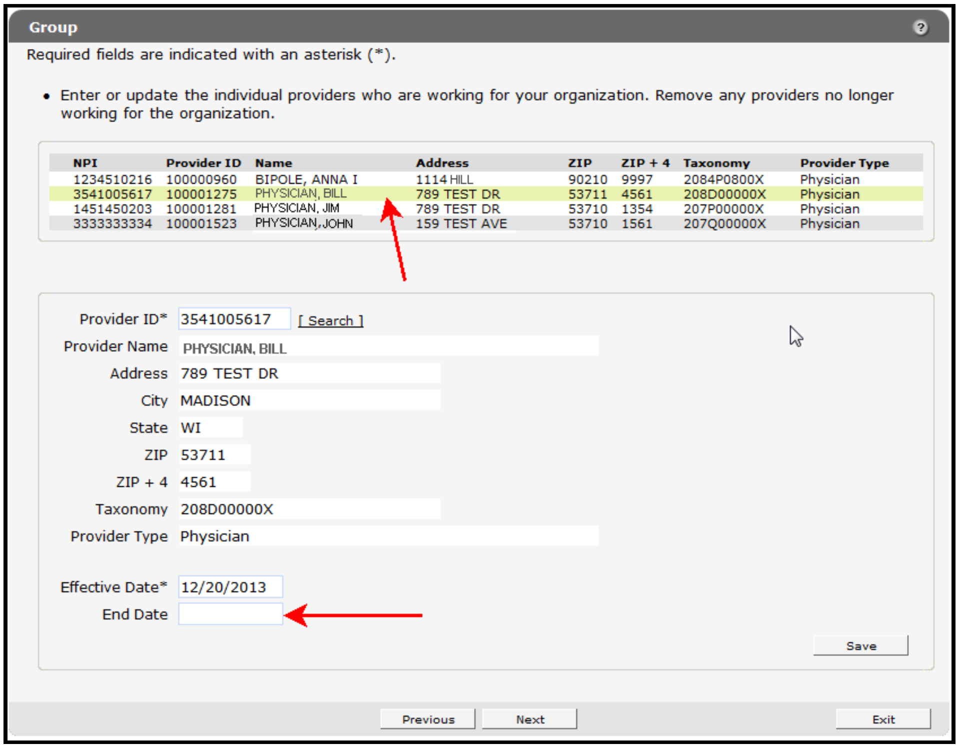
If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

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.



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**.

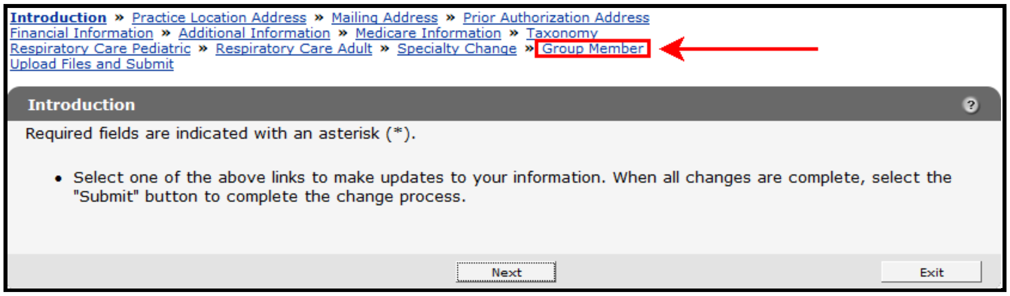
   The fields on the panel will become blank. Repeat the procedure for any other providers to be removed from the group. After the changes are submitted, the provider will be removed from the list once the end date is reached.
4. When finished entering information, one of three options may be chosen:
   - 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

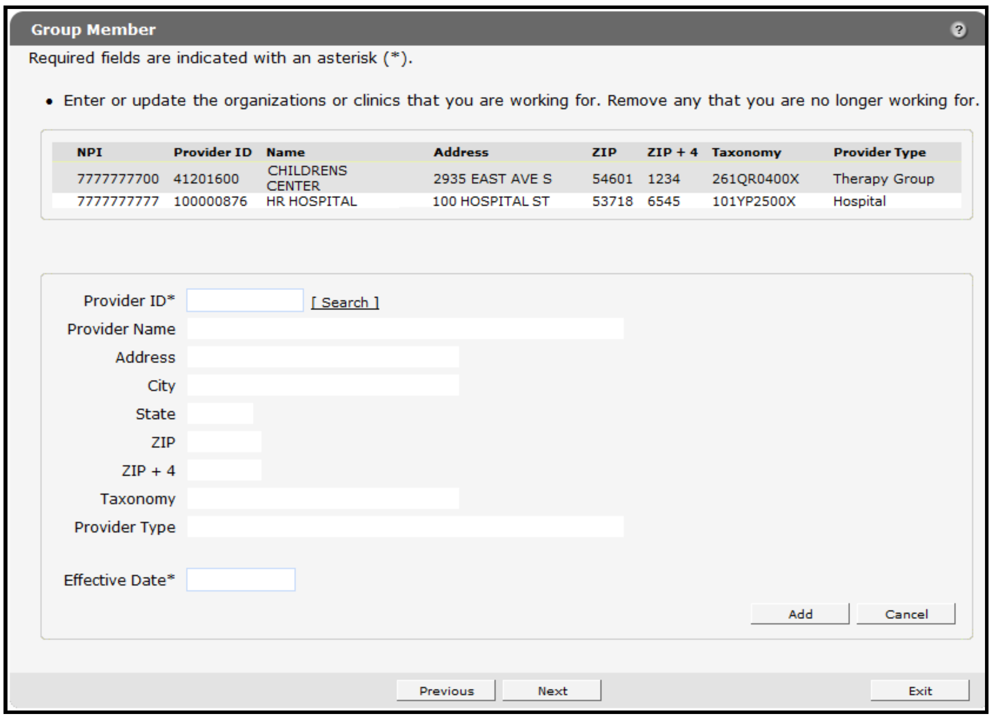
The Group Member panel is available to all individual Medicaid-enrolled providers to enter or update information about their group affiliations.



Group Member Link

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

   The Group panel will be displayed.



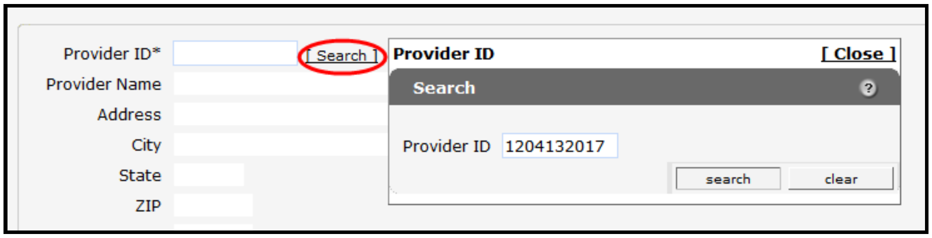
Group Member Panel

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.

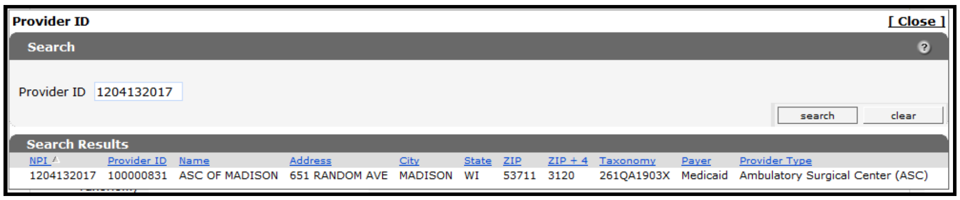
   The Provider ID Search sub-panel will be displayed.



Provider ID Search Sub-panel

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

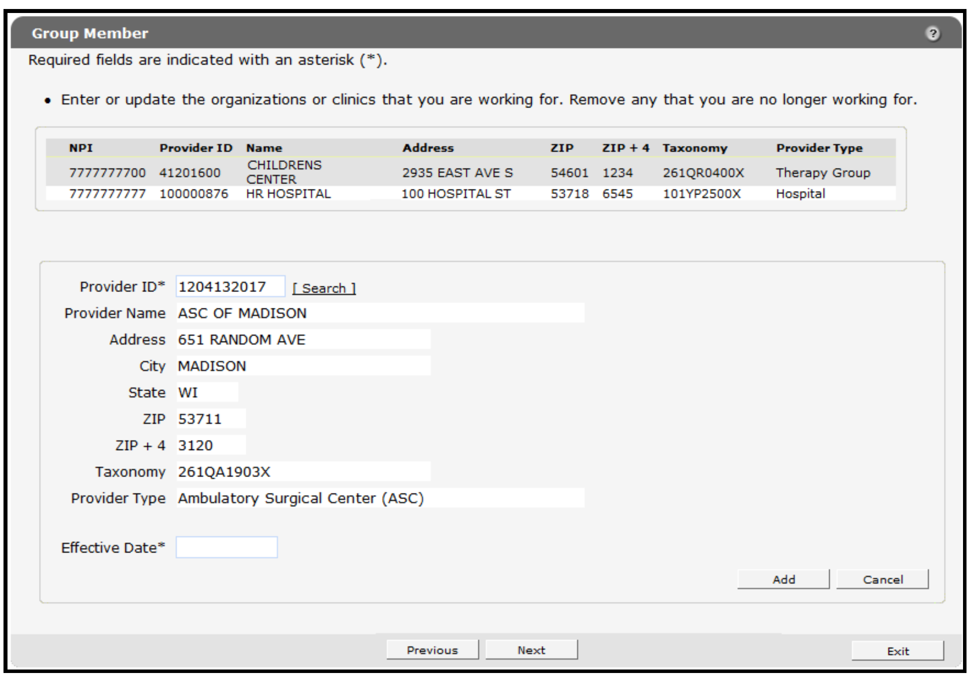
   The Provider ID Search Results panel will populate with the information for the selected provider.



Provider ID Search Results Panel

4. Click the row for the selected provider.

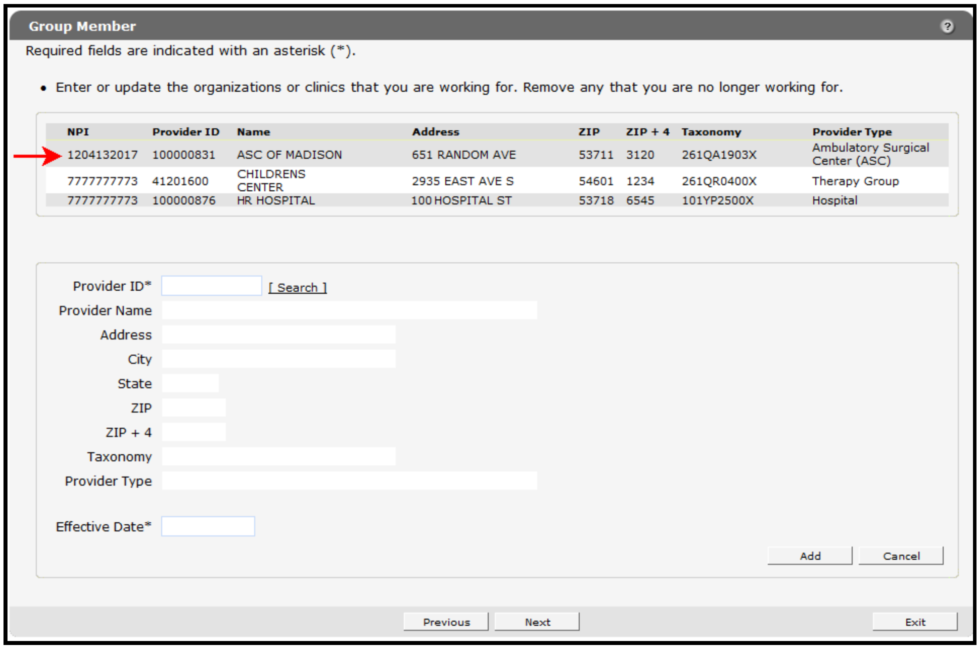
   The Search Results panel will close, and the fields on the Group Member panel will populate with the group's information.



Group Member 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.



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.

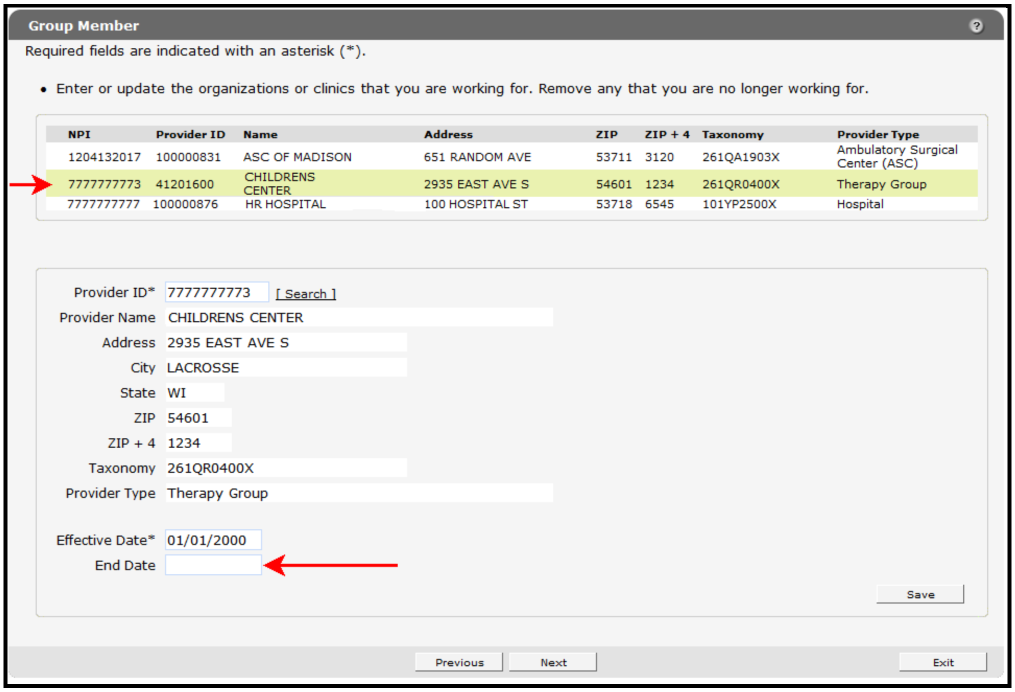
If there is a problem with the information entered, an error message will be displayed at the top of the panel when leaving the page. Correct the error and choose one of the above choices for continuing to another panel or submitting your information.

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 Affiliation Selected

2. In the **End Date** field, enter the date when the provider will no longer be affiliated with the group.
3. 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.
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.

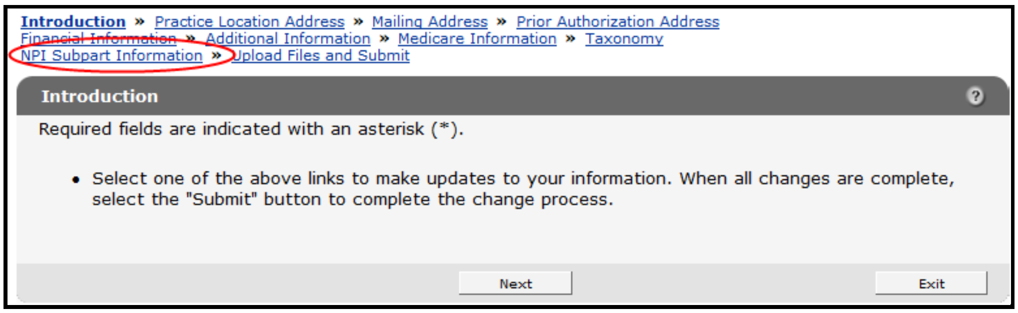
Note: Information is not saved until it is submitted to ForwardHealth via the Upload Files and Submit panel. If the demographic maintenance tool is exited before the information is submitted, the information will be lost and will need to be re-entered.

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.

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.

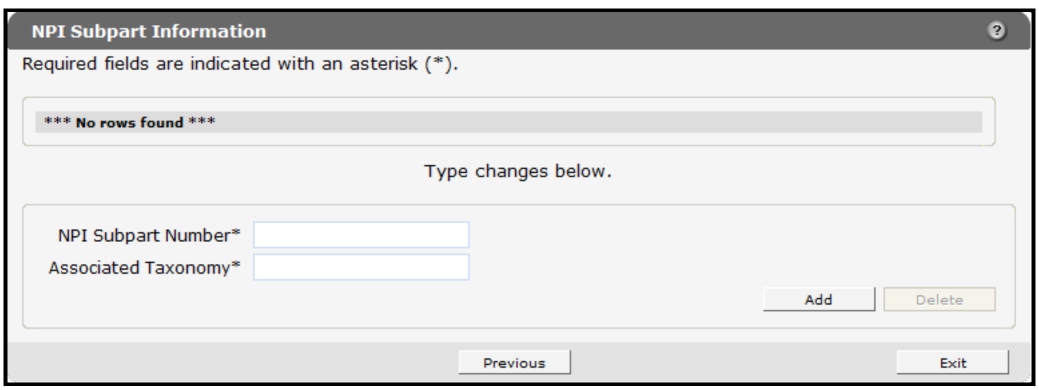
The link for the NPI Subpart Information panel is only available to hospital providers.



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.



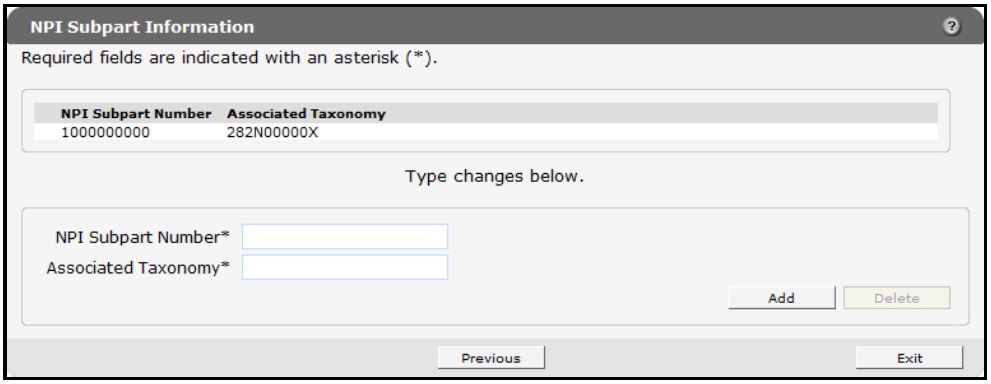
NPI Subpart Information Panel

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.



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**.

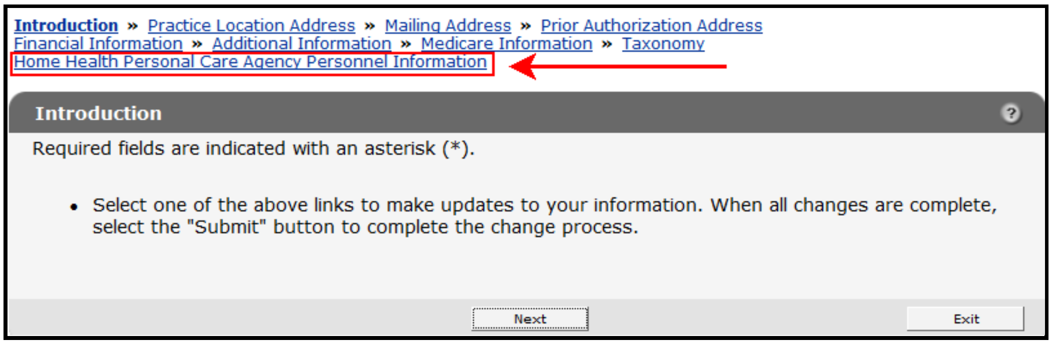
   The NPI subpart information will be removed from the panel.
3. When finished entering information, one of three options may be chosen:
   - Click **Next** to go to the next panel on the list.
   - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
   - 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

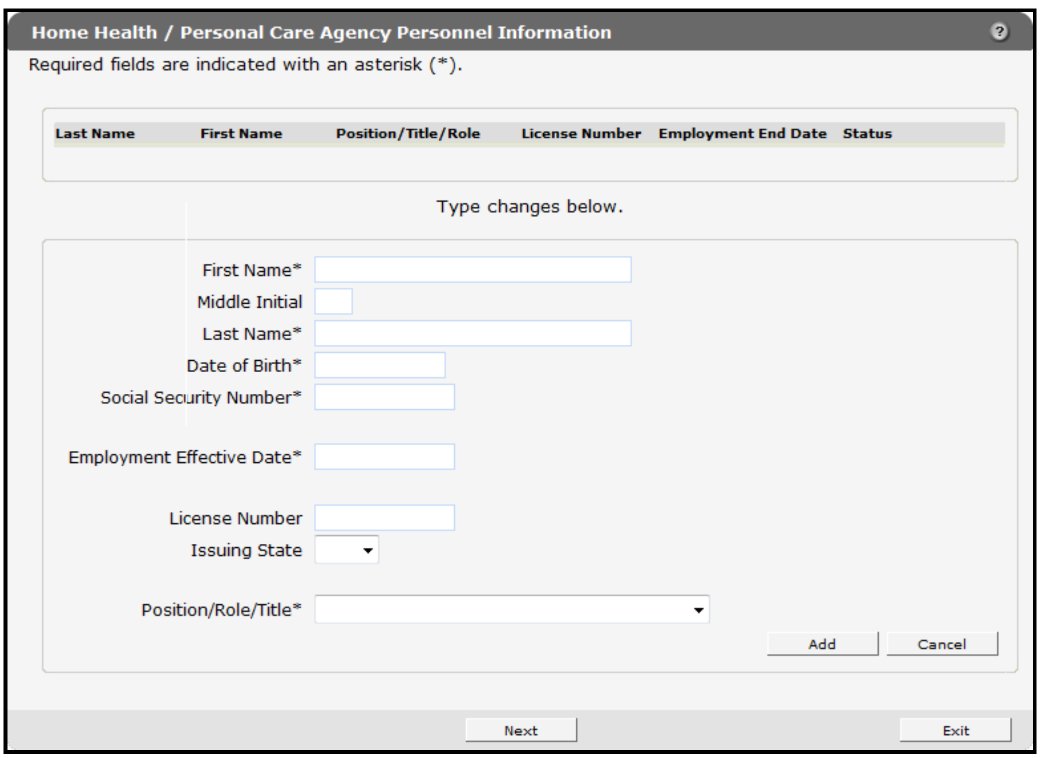
The link for the Personnel Information panel is only available to home health and personal care agency providers.



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.



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.

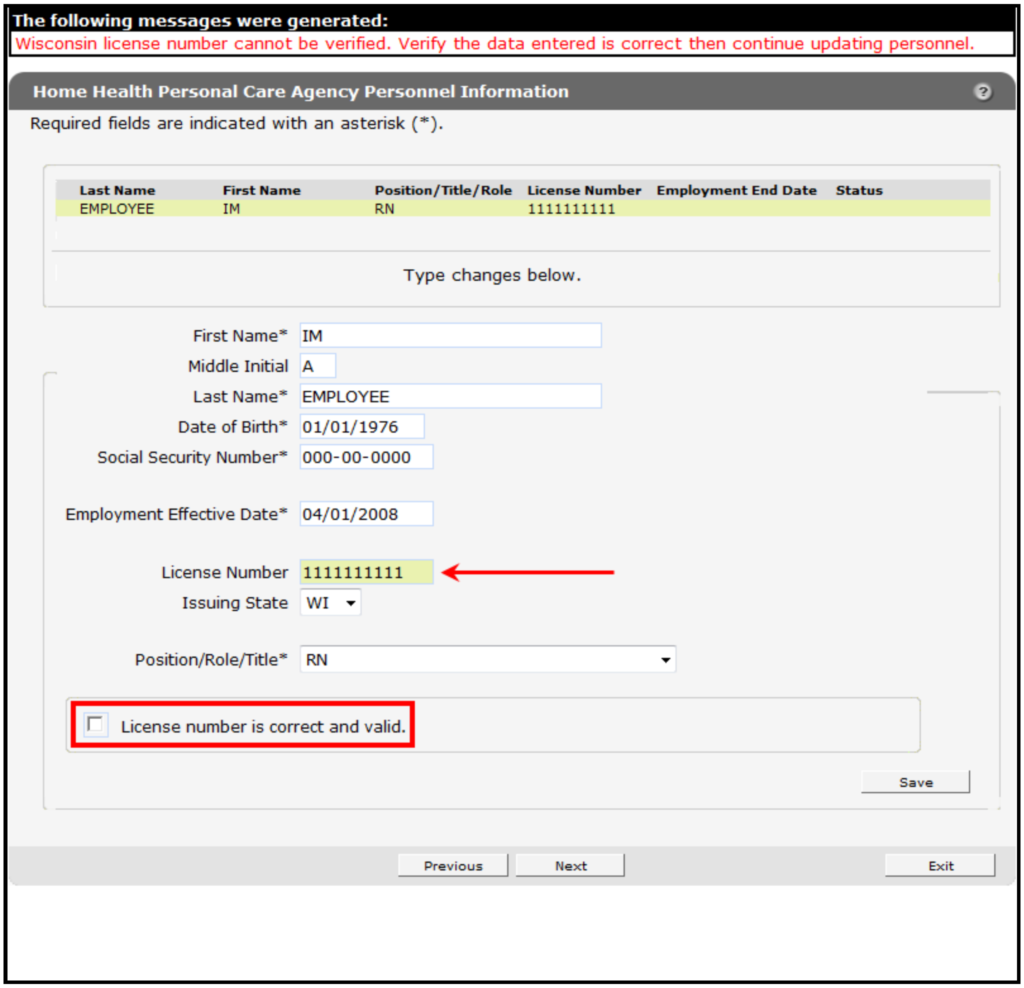
Note: A license number and issuing state are required for all personnel except home health workers and personal care workers.

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**.

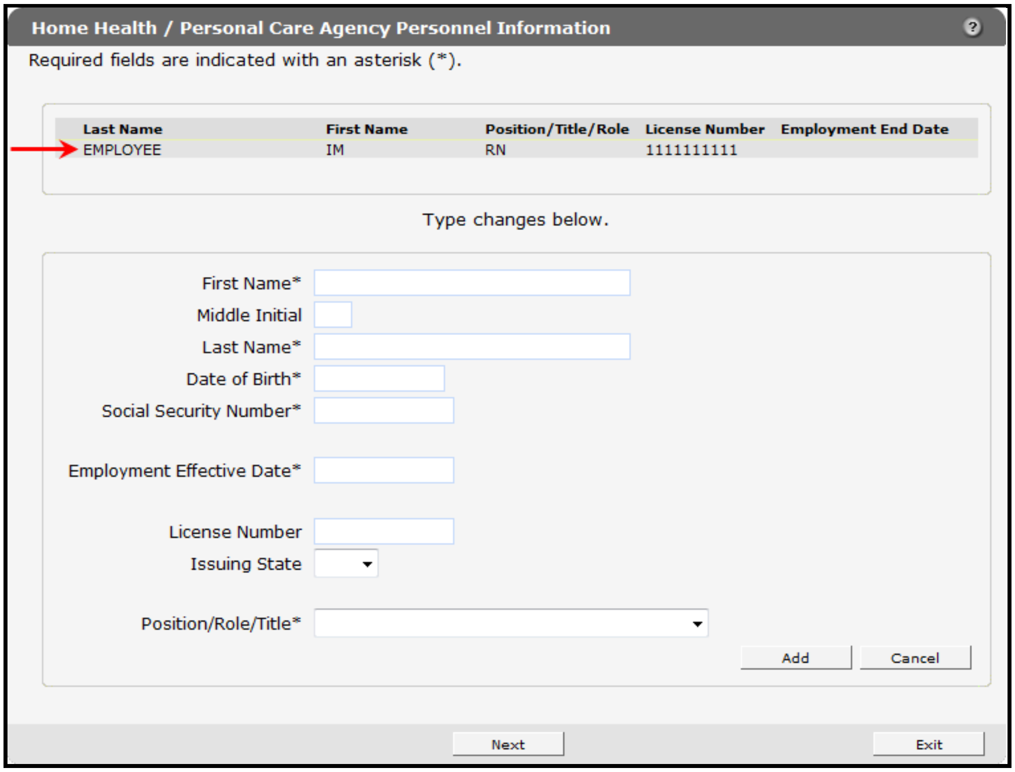
If a license number is entered that cannot be immediately verified, an error message will display at the top of the panel, the License Number field will be highlighted, and a License number is correct and valid checkbox will display at the bottom of the panel.



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.



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

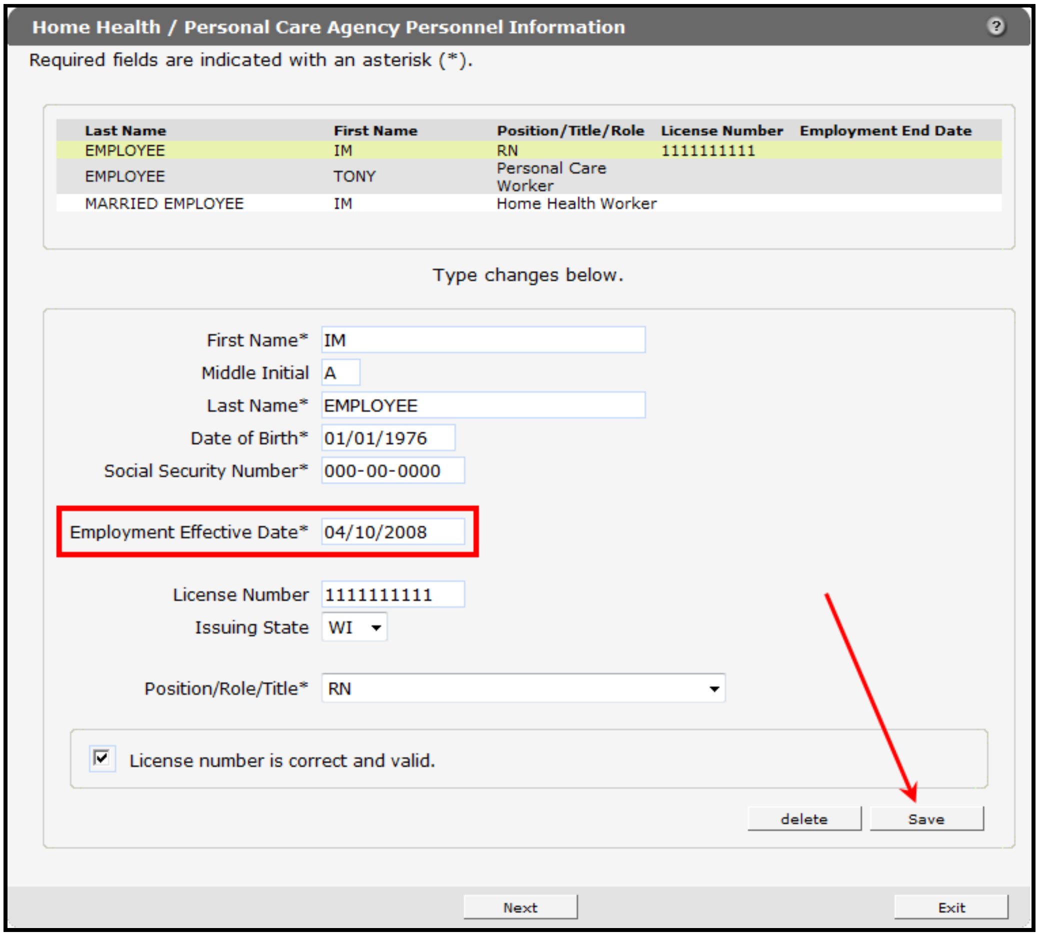
Note: This section applies to personnel information that has been added to the Home Health/Personal Care Agency Information panel but not yet submitted to ForwardHealth from the Upload Files and Submit panel.

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 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.

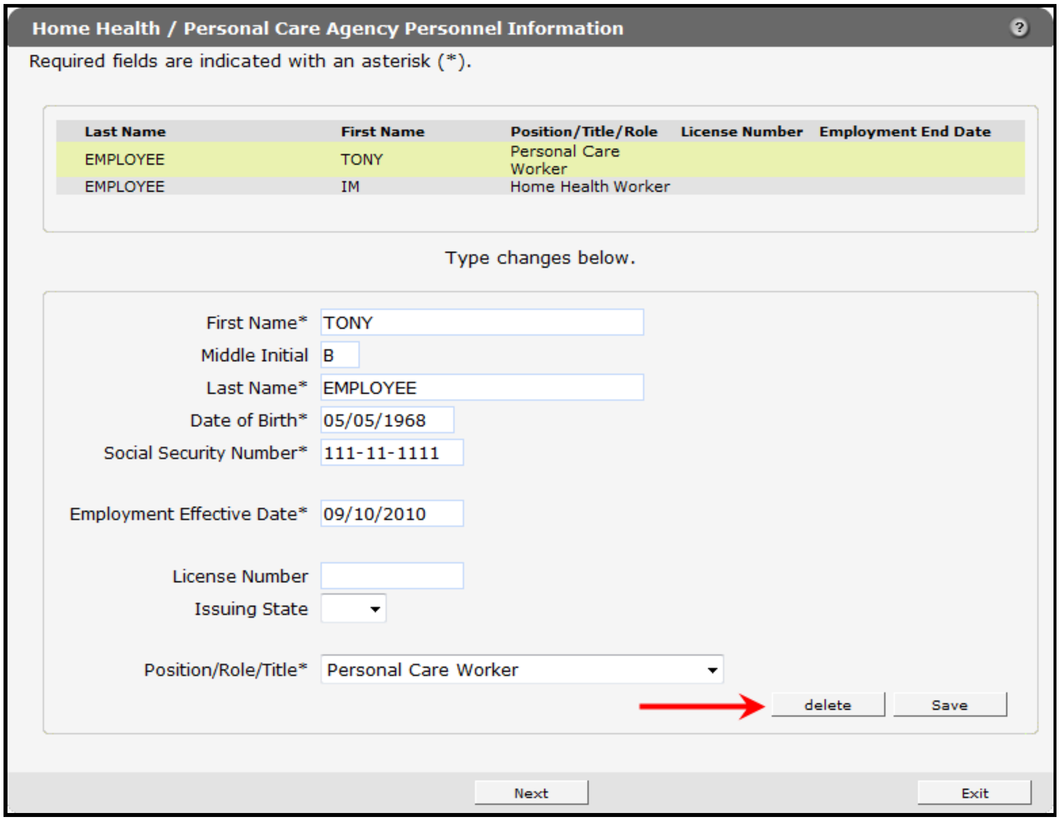
16.3 Delete Unsubmitted Personnel Information

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 enddated.

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

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

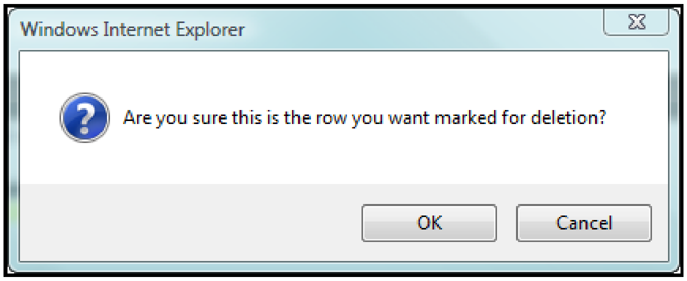
   The employee's information will populate the fields on the panel.



   Home Health/Personal Care Agency Personnel Information 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

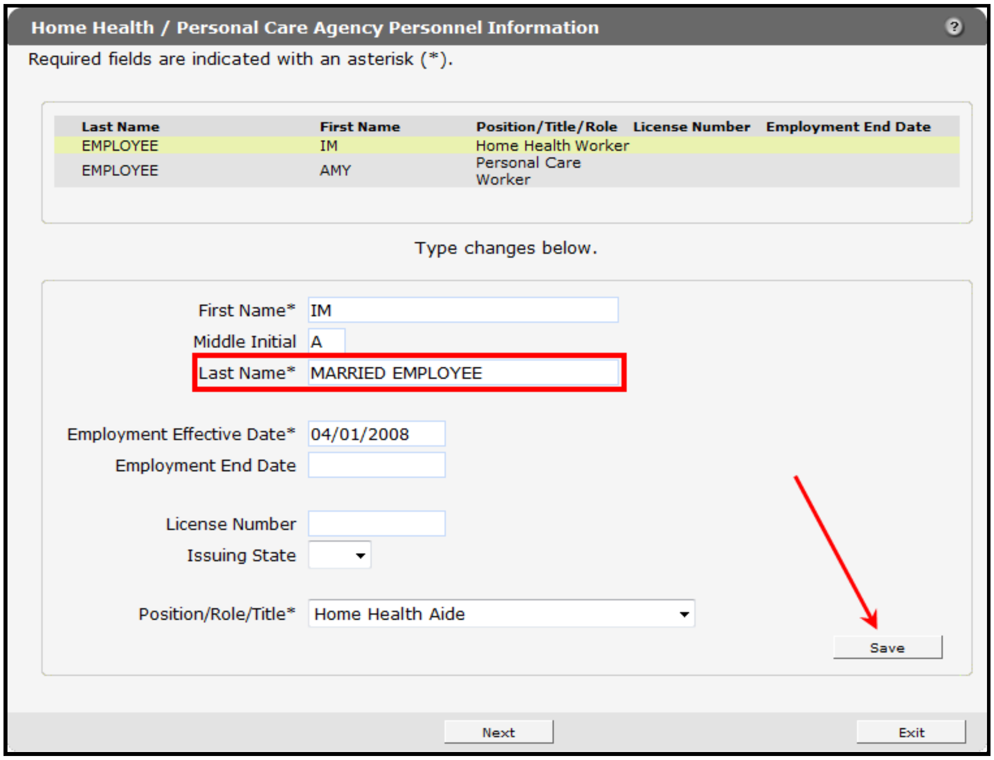
Note: This section applies to personnel information that has been previously submitted.

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.



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

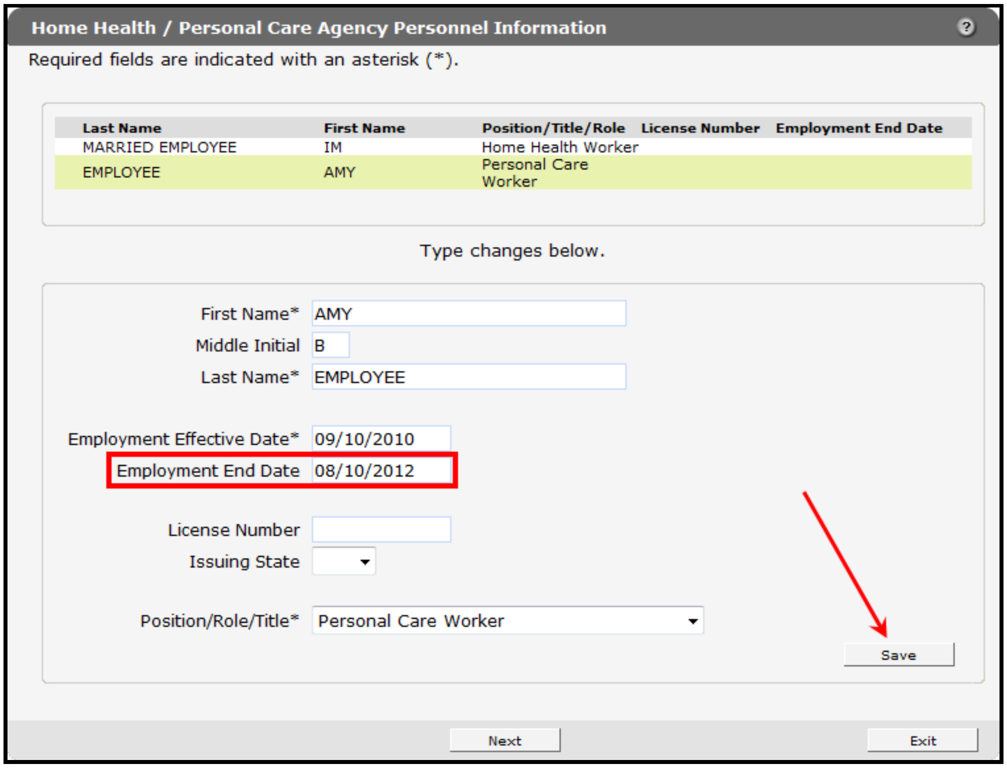
Note: This section applies to personnel information that has been previously submitted.

---

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

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

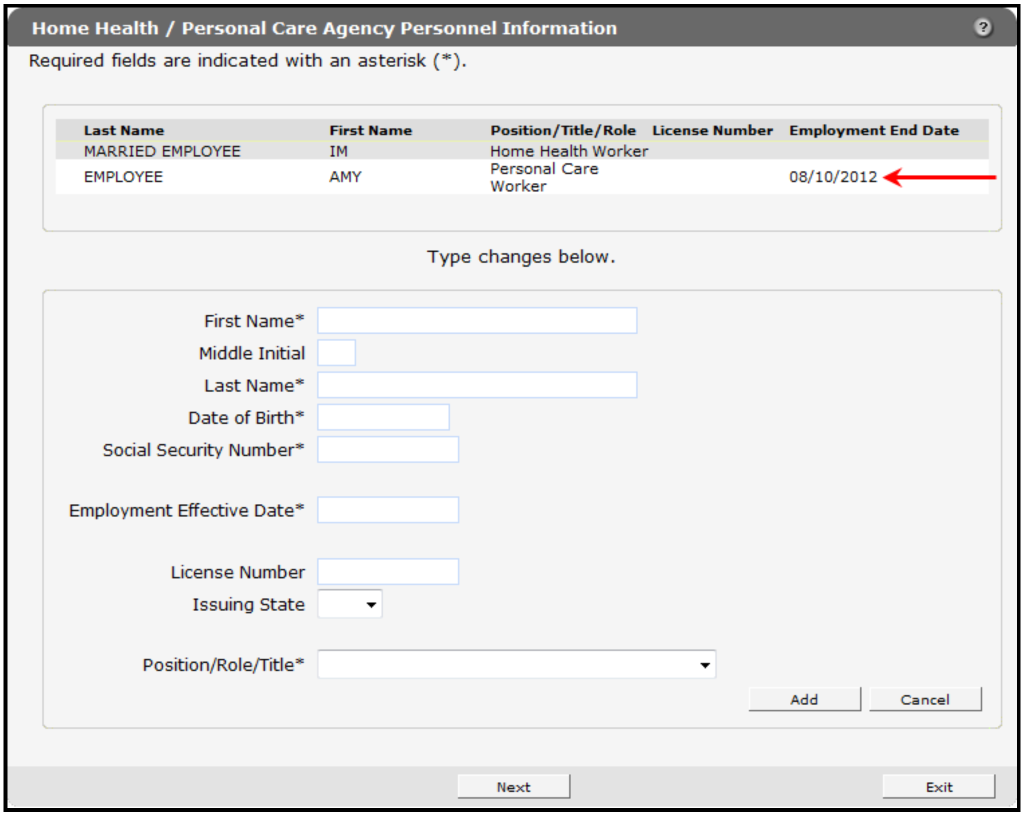
2. Enter the last day the employee was or will be employed at the agency in the Employment End Date field.



Home Health/Personal Care Agency Personnel Information Panel

3. Click **Save**.

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



Home Health/Personal Care Agency Personnel Information Panel

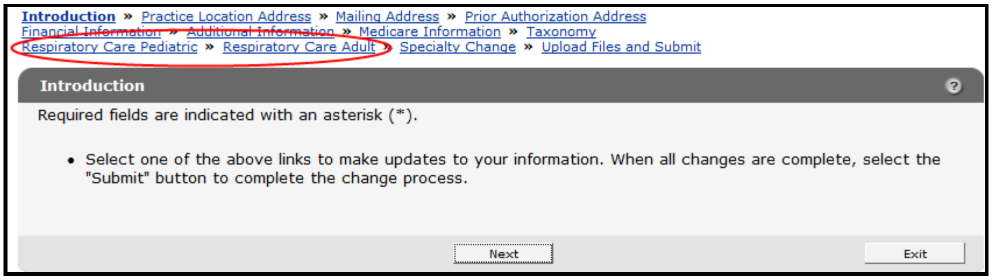
4. When finished entering information, one of three options may be chosen:
   - Click **Next** to go to the next panel on the list.
   - Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
   - Click the **Upload Files and Submit** link above 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

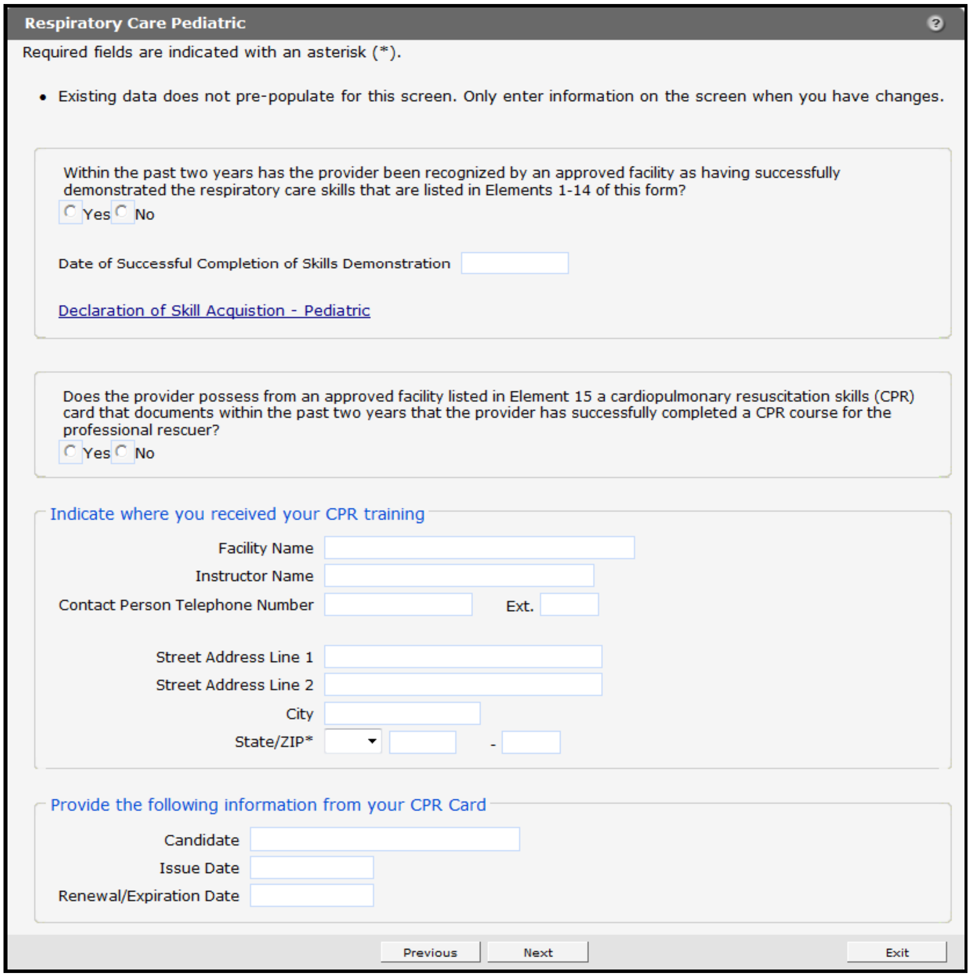
Note: The Respiratory Care Pediatric and Adult panels are the same except for the links to the Declaration of Skill Acquisition forms. The following procedure applies to both panels.

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

Required fields are indicated with an asterisk (*).

- Existing data does not pre-populate for this screen. Only enter information on the screen when you have changes.

Within the past two years has the provider been recognized by an approved facility as having successfully demonstrated the respiratory care skills that are listed in Elements 1-14 of this form?

Yes No

Date of Successful Completion of Skills Demonstration

Declaration of Skill Acquistion - Pediatric

Does the provider possess from an approved facility listed in Element 15 a cardiopulmonary resuscitation skills (CPR) card that documents within the past two years that the provider has successfully completed a CPR course for the professional rescuer?

Yes No

Indicate where you received your CPR training

Facility Name

Instructor Name

Contact Person Telephone Number Ext.

Street Address Line 1

Street Address Line 2

City

State/ZIP* -

Provide the following information from your CPR Card

Candidate

Issue Date

Renewal/Expiration Date

Previous Next Exit

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 successfully 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.

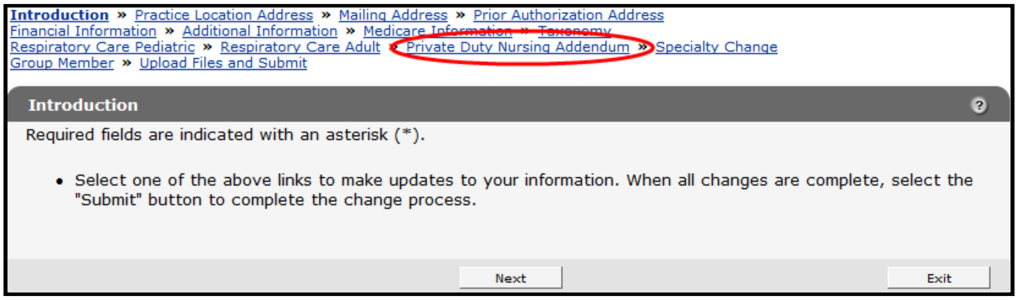
- Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the *Upload Files and Submit* section of this guide.

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.

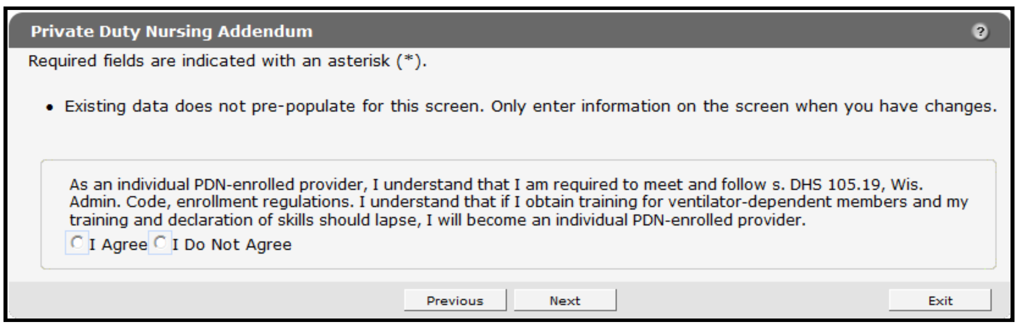


Private Duty Nursing Addendum Link

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

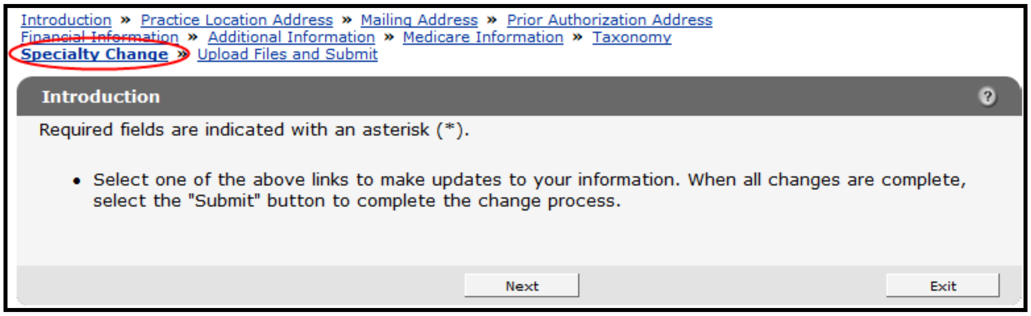
2. Check either **I Agree** or **I Do Not Agree** to the addendum.
3. When finished entering information, one of three options may be chosen:
   - Click **Next** to go to the next panel on the list.
   - Click one of the links at the top of the panel to go to any of the other demographic maintenance 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

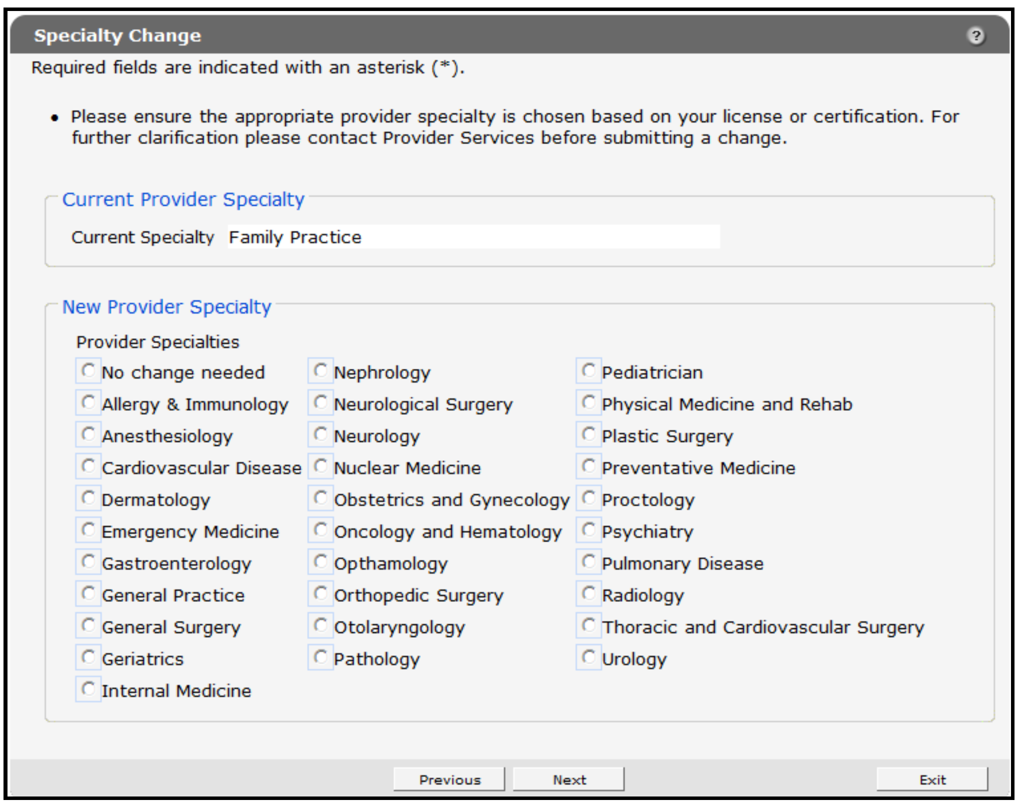
The Specialty Change panel is only available to Medicaid providers whose provider type allows for more than one specialty.



Specialty Change Link

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

   The Specialty Change panel will be displayed.



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.

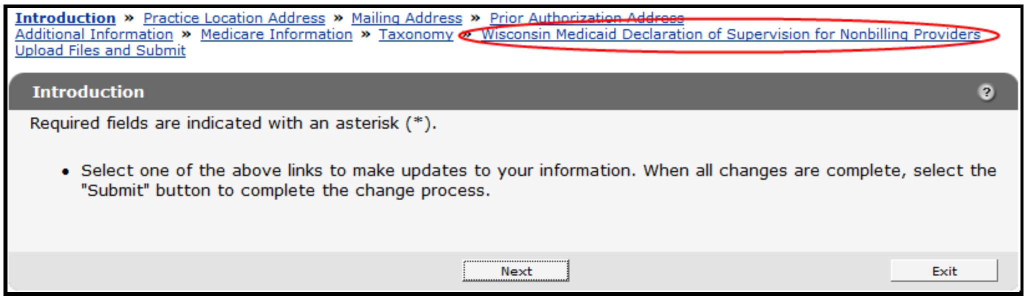
- Click one of the links at the top of the panel to go to any of the other demographic maintenance tool panels.
- Click the **Upload Files and Submit** link above the panel to submit the information. For information about submitting your updates, refer to the *Upload Files and Submit* section of this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

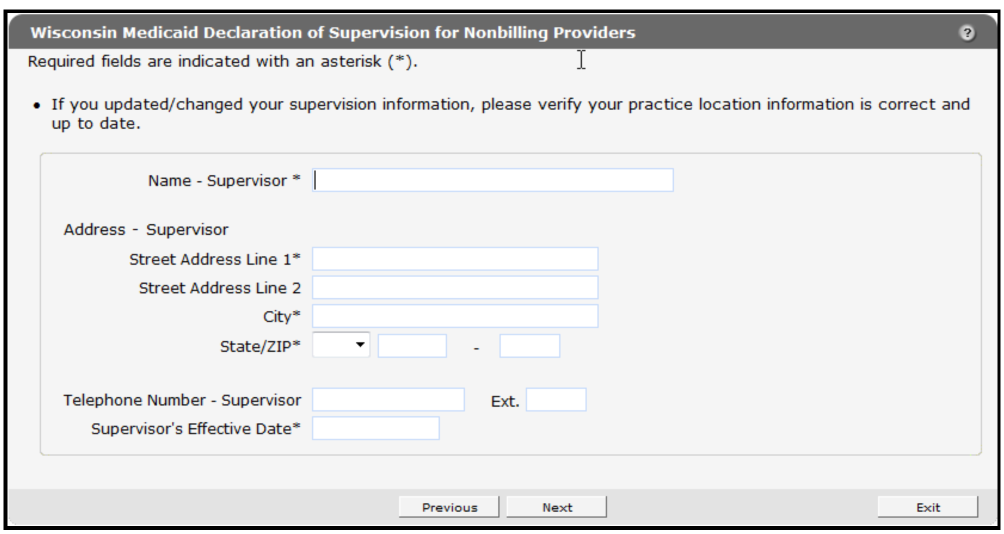
The link for the Wisconsin Medicaid Declaration of Supervision for Nonbilling Providers panel will only be available to the following providers: physician assistants, physical therapy assistants, occupational therapist assistants, and speech-language pathology (SLP) Bachelor Level (BA).



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.



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.

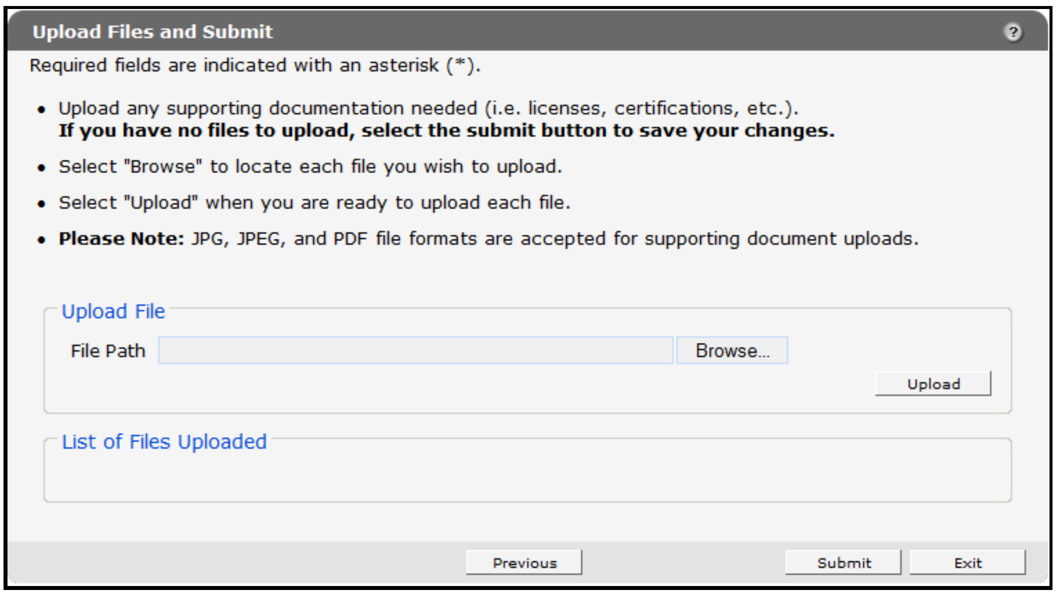
21 Upload Files and Submit Panel

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.

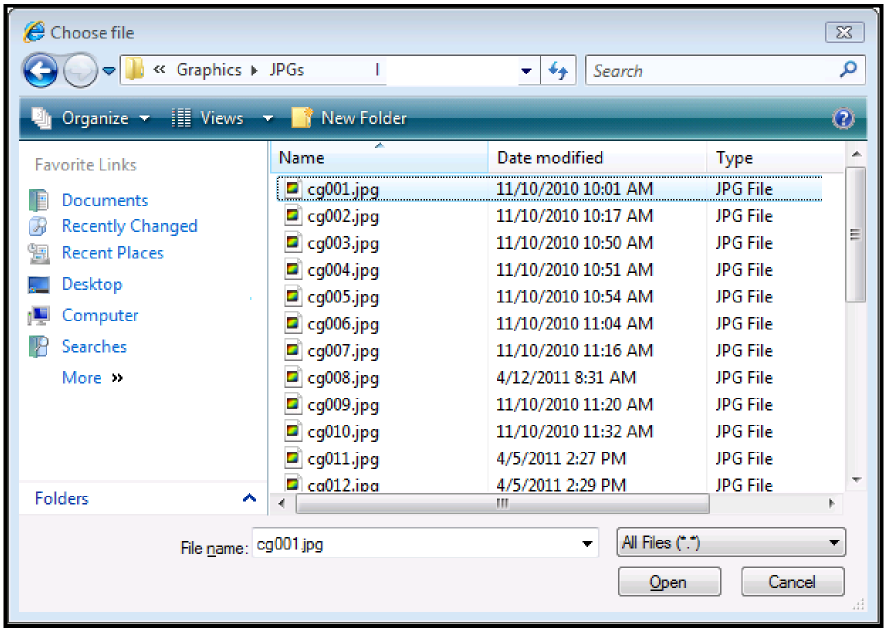


Upload Files and Submit Panel

To upload files if necessary, complete the following steps:

a. Click **Browse**.

   The Choose file window will be displayed.



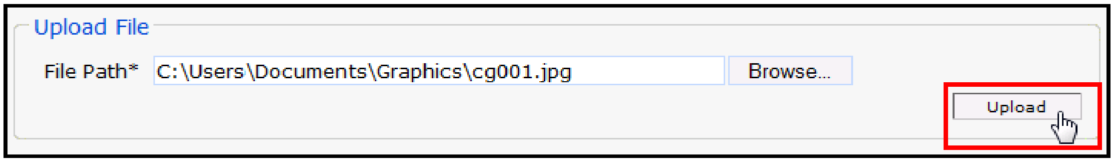
Choose File Window

b. Navigate to the appropriate computer or network location and select the file to be uploaded.

c. Click **Open**.

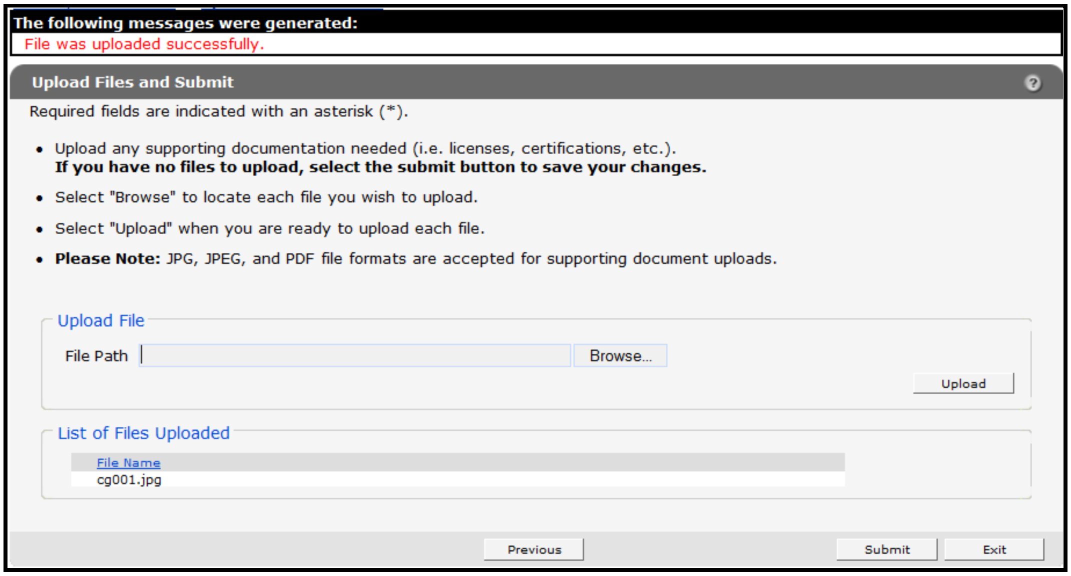
The Choose File window will close and the file path will be displayed in the File Path field.

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.

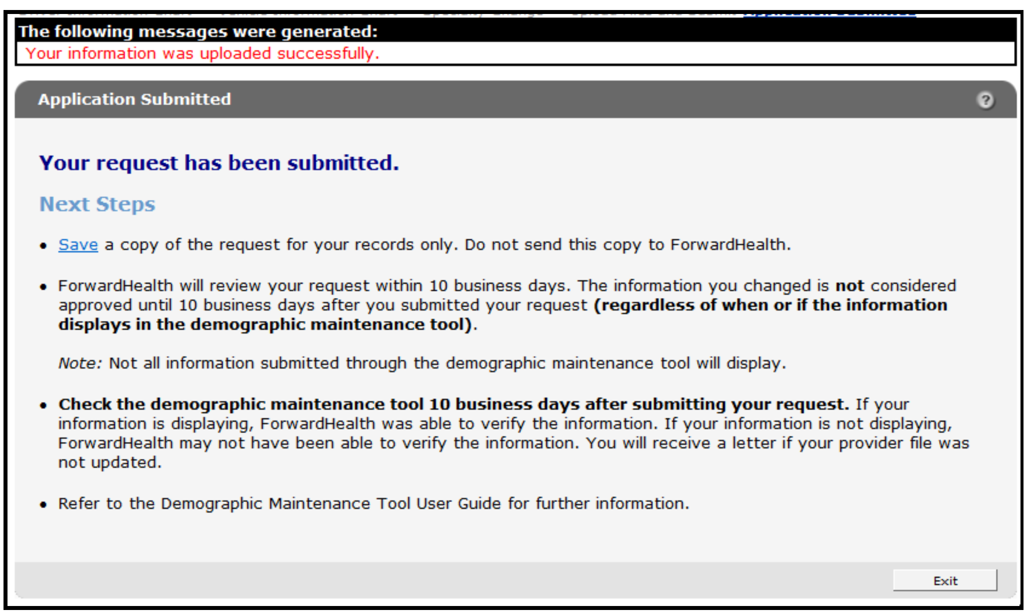


File Uploaded Successfully

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.

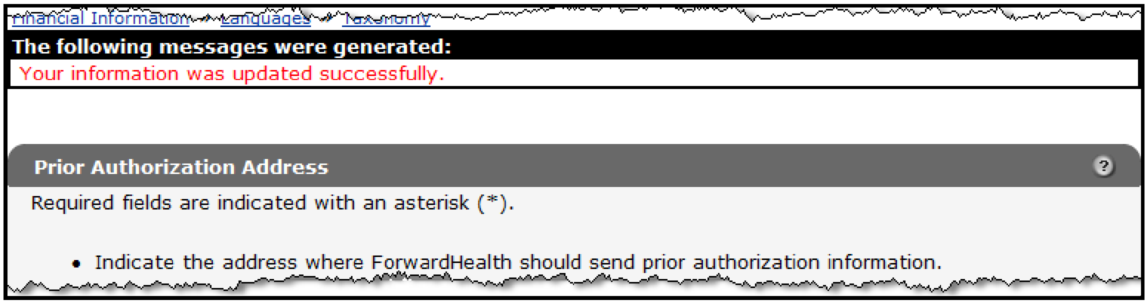
   If ForwardHealth needs to review the entered information, the Application Submitted panel will display the following message: "Your information was uploaded successfully." ForwardHealth will verify the entered information and, once the information is verified, update the provider's file, if applicable.



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