

# ForwardHealth Provider Portal Account User Guide

**Date Last Updated: October 15, 2011**

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## **1 Introduction**

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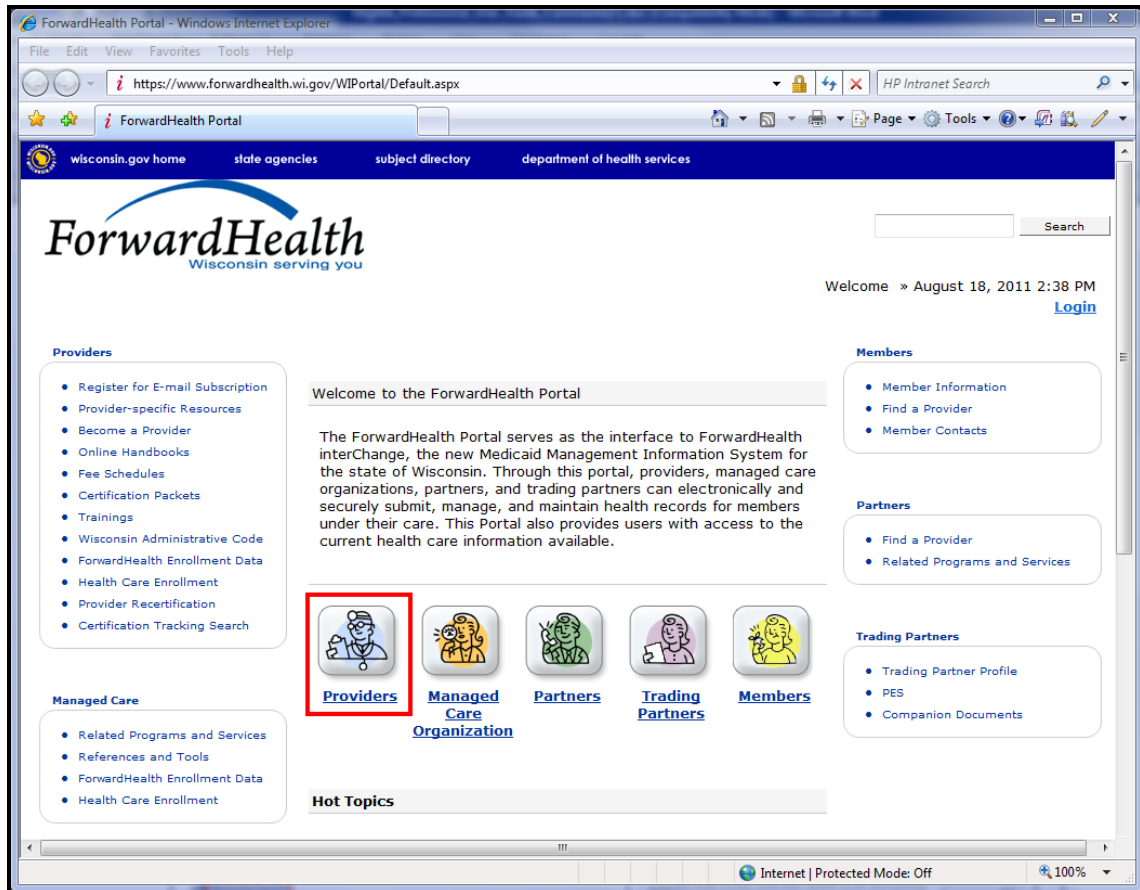
Both public and secure information is accessible through the ForwardHealth Provider Portal. Public information is accessible to all users; however, to gain access to secure information and to conduct business with ForwardHealth, providers are required to establish a secure account within the Portal.

The Portal allows providers to conduct business through a secure entry point 24 hours a day, seven days a week. After creating a secure Provider Portal account, providers can perform various functions including verifying member enrollment; submitting electronic claims, adjustments, and prior authorization requests; and viewing other reports and data.

## 2 Request Portal Access

To establish a Provider Portal account, providers will need a **Personal Identification Number (PIN)** number. Providers can establish as many Provider Portal accounts as needed for their business.

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



*ForwardHealth Portal Page*

2. Click **Providers**.

The public Provider page of the ForwardHealth Portal will be displayed.

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

**ForwardHealth**  
Wisconsin serving you

**interChange**  
Provider

Welcome > September 19, 2011 2:38 PM [Login](#)

Providers can use this page to access up-to-date information about programs covered under ForwardHealth. The links below and to the right offer easy access to key information and tools used most often. Providers should log in to the secure Provider Portal to submit or retrieve information about their account or member data which may be sensitive and/or fall under the requirements of the Health Insurance Portability and Accountability Act (HIPAA).

**Provider Links**

- [BadgerCare Plus Covered Services Comparison Chart](#)
- [Explanation of Benefits](#)
- [ForwardHealth System Generated Claim Adjustments](#)
- [Portal User Guides](#)
- [Provider-specific Resources](#)
- [Related Programs and Services](#)
- [State of Wisconsin Value Added Networks](#)
- [Trainings](#)

**What's New?**

A summary of what is new for providers:

**Login to Secure Site**

Username

Password

- Logging in for the first time?
- Forgot your password?
- Account Users Guide

**Quick Links**

- Register for E-mail Subscription
- **Request Portal Access**
- Online Handbooks
- ForwardHealth Updates
- Provider Relations Representatives
- Provider-specific Resources
- Fee Schedules
- Forms
- Become a Provider

*Public Provider Page*

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

**Request Portal Access** ?

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

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

**NPI Information**

NPI Number

**ForwardHealth Certifications for Requested NPI**

Enter your NPI and press search.

**Selected NPI \***

NPI Number

Name

Address Line 1

City

ZIP  -

Taxonomy

Financial Payer

SSN or TIN

OR

**Provider Number Information \***

Provider ID

Financial Payer

SSN or TIN

*Request Portal Access Page*

4. In the **NPI Information** section, enter the provider’s National Provider Identifier (NPI) in the **NPI Number** field if you are a health care provider.

If you are not a health care provider (e.g., a personal care only provider, a specialized medical vehicle provider, or a blood bank), proceed to [Step 9](#).

5. Click **Search**.

The **ForwardHealth Certifications for Requested NPI** section will auto-populate with the provider’s information that ForwardHealth has on file.

If the NPI is not found, the page will refresh; however, the ForwardHealth Certification for Requested NPI section will not be populated with the provider’s information.

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

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

**NPI Information**

NPI Number

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

**Selected NPI \***

NPI Number

Name

Address Line 1

City

ZIP  -

Taxonomy

Financial Payer

SSN or TIN

OR

**Provider Number Information \***

Provider ID

Financial Payer

SSN or TIN

*Request Portal Access Page*

6. Click the appropriate row from the ForwardHealth Certifications for Requested NPI section.

The **Selected NPI** section will auto-populate with the selected information.

**NPI Information**

NPI Number

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

**Selected NPI \***

NPI Number

Name

Address Line 1

City

ZIP  -

Taxonomy

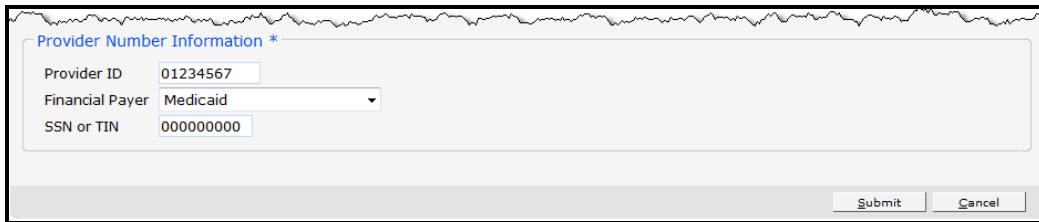
Financial Payer

SSN or TIN

*Selected NPI Section with Auto-populated Information*

7. Enter the Social Security Number (SSN) or Tax Identification Number (TIN) in the **SSN or TIN** field in the Selected NPI section.

8. Skip to [Step 12](#).
9. If the provider is not a health care provider and therefore does not have an NPI, enter the provider's Medicaid Provider ID in the **Provider Number Information** section.
10. From the **Financial Payer** drop-down menu, select the financial payer certification for which the provider is requesting a Provider Portal account.
11. Enter the Social Security Number (SSN) or Tax Identification Number (TIN) in the **SSN or TIN** field.



The screenshot shows a web form titled "Provider Number Information \*". It contains three input fields: "Provider ID" with the value "01234567", "Financial Payer" with a dropdown menu set to "Medicaid", and "SSN or TIN" with the value "000000000". At the bottom right of the form are "Submit" and "Cancel" buttons.

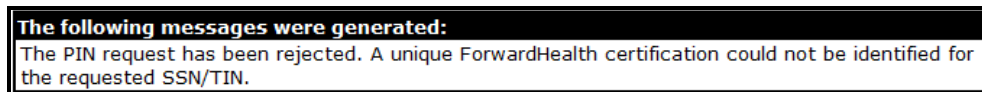
*Provider Number Information Section*

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



*Confirmation Page*

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



*Example Error Message*




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

- **No provider agreement on file.** Call Provider Services at 1-800-947-9627 for the agreement.
- **SSN or TIN number is incorrect.** Check the number and enter the correct number.
- **PIN already requested.** Check within your organization to find out if someone has already received the PIN and set up an account(s).

If you have questions, call the Portal Help Desk (toll-free) at 1-866-908-1363 Monday through Friday between 8:30 AM and 4:30 PM.

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

<p>Scott Walker Governor</p> <p>Dennis G. Smith Secretary</p> <p>August 22, 2011</p> <p>2113758 GENERAL CLINIC 92 E 88TH ST STE 300 JOHN SMITH MADISON, WI 53703-0000</p>	 <p><b>State of Wisconsin</b> Department of Health Services</p>	<p><b>FORWARDHEALTH</b> ELECTRONIC DATA INTERCHANGE DEPT 6406 BRIDGE ROAD MADISON WI 53784-0009</p> <p>Telephone: 866-416-4979 FAX: 608-221-0885 TTY: 711 or 800-947-3529</p> <p><a href="http://dhs.wisconsin.gov/ForwardHealth">dhs.wisconsin.gov/ForwardHealth</a></p>
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Dear Provider:

ForwardHealth has received your request to establish a secure Portal account. A summary of the information you provided is included below, along with a Login ID and Personal Identification Number (PIN) you will need in order to set up your secure provider account on the Forward Health Portal.

NPI or Provider ID:	xx3456xxxx
Provider Type/Speciality:	Physician/Internal Medicine
Taxonomy:	100RC0000X
Zip Code:	53703-0000
Financial Payer:	Medicaid

Please note that for security purposes only digits 3, 4, 5 and 6 of your NPI or Provider ID are shown.

To create your secure Provider account:

1. Go to the ForwardHealth Portal at [www.forwardhealth.wi.gov/](http://www.forwardhealth.wi.gov/).
2. Select the "Providers" button.
3. Select the *Logging in for the first time?* link under "Login to Secure Site".
4. Enter your Login ID and PIN:  
Login ID: xx3456xxxx  
PIN: 6iWoaPmhE

Detailed instructions and helpful hints on setting up your secure Provider account can be found in the *Account User's Guide*. This guide can be found by selecting the "Account" menu located at the top of your screen once you have successfully logged in.

Please contact the EDI Help Desk at (866)416-4979 or through the Contact page on the ForwardHealth Portal at [www.forwardhealth.wi.gov/](http://www.forwardhealth.wi.gov/) if you have any additional questions or need further assistance.

F-13512 (08/08)

*Wisconsin.gov*

*PIN Letter*

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## 3 Set Up An Account

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After receiving a PIN letter, users may set up an account on the ForwardHealth Provider Portal. Users will use the Login ID and PIN from the PIN letter to create a user name and password as well as to enter contact and security information.

To add a new organization to a current account, see [Section 7 Add Organization](#) for more information.

### 3.1 Account Types

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

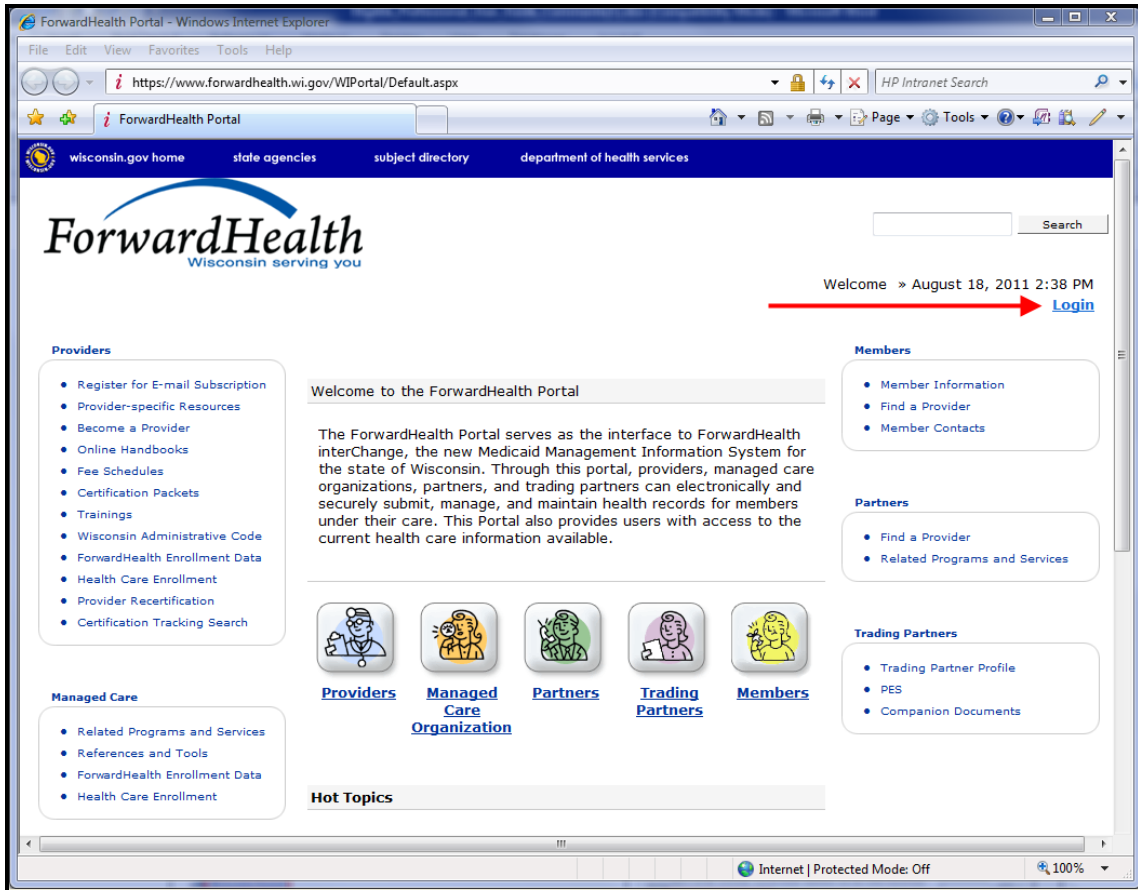
- **Administrative accounts** – The user who establishes the Portal account with the Login ID and PIN (from the PIN letter) is considered the account administrator and is responsible for managing the Portal account. Administrative accounts are granted complete access to all functions and applications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

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

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

### 3.2 Logging in for First Time

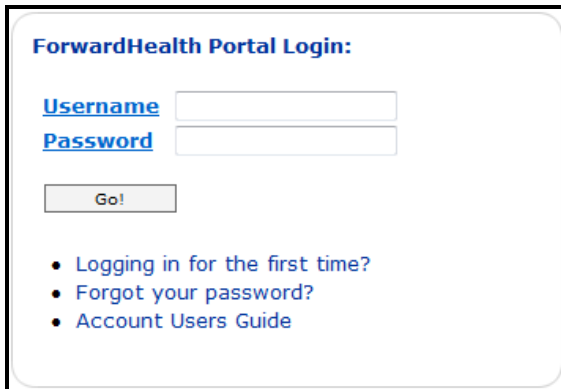
1. Once you receive the PIN letter, access the ForwardHealth Portal at <https://www.forwardhealth.wi.gov/>.



ForwardHealth Portal Page

2. Click **Login**.

The **ForwardHealth Portal Login** box will be displayed.



ForwardHealth Portal Login

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

The **Account Setup** page will be displayed.

**Account Setup**

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

**Instructions:**

If you have received your Personal Identification Number Letter, please enter your Login ID and Personal Identification Number (PIN) as they are listed and click on the Setup Account button.

Once your Login ID and PIN have been validated, you will then need to setup your user account.

If you don't know your Login ID or PIN, please contact the helpdesk at 1-866-416-4979 to have a new PIN re-issued.

Please note that Login ID and PIN are case sensitive.

Login ID\*

Personal Identification Number\*

*Account Setup Page*

4. Enter the **Login ID** and **Personal Identification Number** listed in your PIN letter.

For security purposes, the PIN letter will contain only 4 digits of the NPI or Medicaid Provider ID reported; however, users should **enter the entire** NPI or Medicaid Provider ID in the Login ID field.

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

5. Click **Setup Account**.

The **Account Setup** user profile page will be displayed.

**Account Setup**

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

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

User Name\*

Password\*

Confirm Password\*

Contact First Name\*

Contact Last Name\*

Telephone Number\*

E-Mail\*

Confirm E-Mail\*

First Security Question\*

First Answer\*

Second Security Question\*

Second Answer\*

Security and Confidentiality

The User understands that the Portal Access User Account Agreement (hereinafter "Agreement"), effective today, is made by and between the State of Wisconsin Department of Health Services ("DHS") and users who sign up for an account on this website (hereinafter "User").

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

*Account Setup User Profile Page*

6. Enter information in the fields. It is necessary to **complete all the fields** on this page.

- The **User Name** must be between 6-20 characters and can only contain letters and numbers. The User Name is not case-sensitive.

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**Note:** The User Name cannot be changed without deactivating the account.

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- The **Password** must be between 8-15 characters and must contain three different types of characters such as upper-case letters, lower-case letters, special characters, or numbers. The Password must be unique and cannot contain information from the User Name, Contact First Name, Contact Last Name, or the security answers.
- The **Telephone Number** must include the area code. The number will be auto-formatted.
- The security questions must have at least 8 characters and cannot contain special characters (except for spaces).
- The security answers must have at least 3 characters and cannot contain special characters (except for spaces). The security answers allow you to validate your identity and reset your password if necessary. Security answers are case-sensitive.

7. Read the **Security and Confidentiality** agreement.

8. Click the agreement checkbox.

9. Click **Submit**.

Your secure Provider page will be displayed.



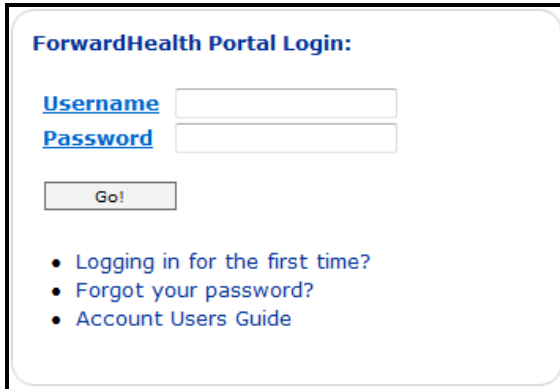
*Secure Provider Page*

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

### 3.3 Reset Password

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

The **ForwardHealth Portal Login** box will be displayed.



**ForwardHealth Portal Login:**

**Username**

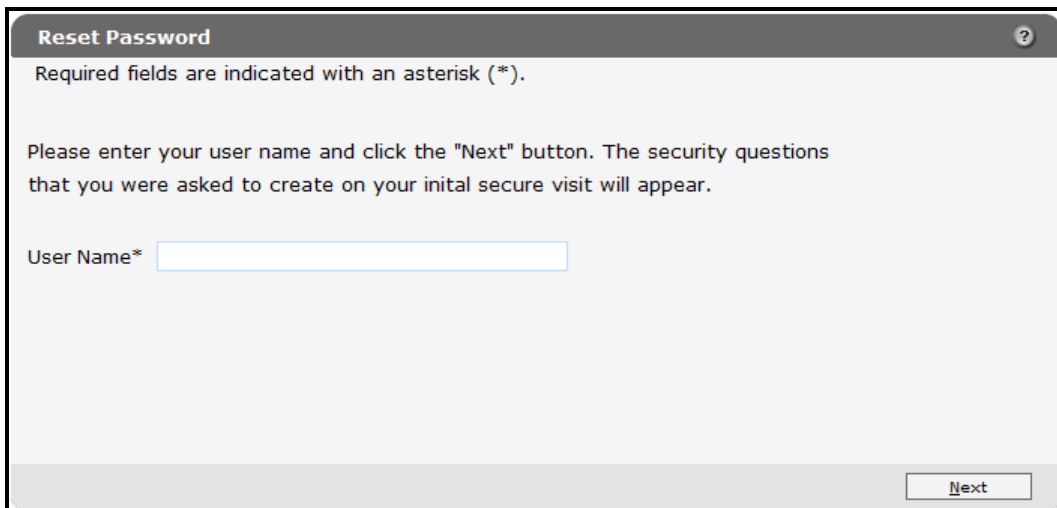
**Password**

- [Logging in for the first time?](#)
- [Forgot your password?](#)
- [Account Users Guide](#)

*ForwardHealth Portal Login*

3. Click **Forgot your password?**

The **Reset Password** page will be displayed.



**Reset Password** ?

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

Please enter your user name and click the "Next" button. The security questions that you were asked to create on your initial secure visit will appear.

User Name\*

*Reset Password Page*

4. Enter the account **User Name**.
5. Click **Next**.

The **Reset Password** page with the security questions created when the account was set up will be displayed.

The screenshot shows a web form titled "Reset Password" with a help icon in the top right corner. Below the title, it states "Required fields are indicated with an asterisk (\*)." The form contains the following fields: "User Name" with the value "ADMINISTRATOR01"; "First Security Question" with the value "model of first car" and "First Answer\*" with an empty text box; "Second Security Question" with the value "mother's maiden name" and "Second Answer\*" with an empty text box. At the bottom right, there is a "Next" button.

*Reset Password Page with Security Questions*

6. Enter the answers to the security questions. The answers are case-sensitive.
7. Click **Next**.

The **Reset Password** page with new password fields will be displayed.

The screenshot shows the same "Reset Password" form, but now with password fields. The "User Name" field still contains "ADMINISTRATOR01". The security question and answer fields remain the same. Below the security questions, it says "Enter your password in the fields and click the 'Submit' button. Password must contain one uppercase letter, one number and at least 8 characters." There are two password fields: "New Password\*" and "Confirm Password\*", both with empty text boxes. At the bottom right, there are "Submit" and "Cancel" buttons.

*Reset Password Page with New Password Fields*

8. Enter a **New Password** (twice for confirmation).
9. Click **Submit**.

Your secure Provider page will be displayed.

## 4 Maintenance

Users may change account information such as contact name, telephone number, or e-mail address through the Maintenance link on the Account Home page.

### 4.1 Change Account Information

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

The **ForwardHealth Portal Login** box will be displayed.

3. Enter your **Username**.
4. Enter your **Password**.

Your password is case sensitive. Make certain to enter it exactly.

5. Click **Go!**

The secure Provider page will be displayed.

The screenshot displays the ForwardHealth Provider Portal. At the top, there is a navigation bar with links for 'Home', 'Search', 'Providers', 'Enrollment', 'Claims', 'Prior Authorization', 'Remittance Advices', 'Trade Files', and 'HealthCheck'. Below this, a secondary menu includes 'Max Fee Home', 'Account', 'Contact Information', 'Online Handbooks', 'Site Map', and 'Certification'. The 'Account' link is highlighted with a red box, and a red arrow points to it from the right. The main content area features a 'What's New' section with a magnifying glass icon and text about real-time applications. To the right, there is a 'Home Page' section with links for 'Update User Account', 'Customize Home Page', 'Demographic Maintenance', and 'Electronic Funds Transfer'. Below that is a 'Quick Links' section with links for 'Register for E-mail Subscription', 'Provider-specific Resources', 'Designate 835 Receiver', 'Online Handbooks', 'ForwardHealth Updates', 'Fee Schedules', 'Forms', 'Become a Provider', and 'Certification Tracking Search'. At the bottom, there is a 'Messages' section with a question mark icon. The user is logged in with NPI: 1234567890, Taxonomy Number: 100RC0000X, and Zip Code: 53703. The financial payer is Medicaid.

*Secure Provider Page*

6. Click **Account** on the main menu at the top of the page.

The **Account Home** page will be displayed.



**Account Home**

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

**What would you like to do?**

- [Maintenance](#)
- [Messages](#)
- [Change Password](#)
- [Clerk Maintenance](#)
- [Switch Organization](#)
- [Add Organization](#)
- [Account Users Guide \(PDF\)](#)

*Account Home Page*

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

7. Click **Maintenance**.

The **Account Maintenance** page will be displayed.

**Account Maintenance** ?

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

User Profile

User Name	ADMINISTRATOR01
Contact First Name*	Henry
Contact Last Name*	Provider
Telephone Number*	(345)123-6789
E-Mail*	h.provider@xyz.com
Confirm E-Mail	h.provider@xyz.com
First Security Question*	model of first car
First Answer	
Second Security Question*	mother's maiden name
Second Answer	

Submit Cancel Change Password

*Account Maintenance Page*

If not already created, you will need to create two security questions and corresponding answers prior to submitting your changes. If you forget or lose your password, the security questions will be used to validate your identity and allow you

to reset your password. Be sure to create questions which you will readily know the answer to, but which are not common knowledge.

The security questions must have at least 8 characters and cannot contain special characters (except for spaces).

The security answers must have at least 3 characters and cannot contain special characters (except for spaces). Security answers are case-sensitive.

8. Make your desired changes.

9. Click **Submit**.

A confirmation message will be displayed.

**The following messages were generated:**

Save was Successful

*Confirmation Message*

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

## 5 Change Password

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

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

1. On the Account Home page, click **Change Password**.

The **Change Password** page will be displayed.



*Change Password Page*

2. Enter your **Current Password**.
3. Enter your **New Password** (twice for confirmation).

The password must be between 8-15 characters and must contain three different types of characters such as upper-case letters, lower-case letters, special characters, or numbers. The password must be unique and cannot contain information from the user name, contact first name, contact last name, or the security answers.

**Note:** The new password cannot match any of the last 8 passwords.

4. Click **Submit**.

A confirmation message will be displayed.

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

*Confirmation Message*

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

## 6 Clerk Maintenance

If more than one person will be working on the account, you must set up clerk accounts and assign clerks roles for the various functions the clerks will be performing.

1. On the Account Home page, click **Clerk Maintenance**.

The **Clerk Maintenance** page will be displayed.

**Clerk Maintenance** ?

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

User Name	Contact First Name	Contact Last Name
A2CLERK	a2	clerk
ABCDEFGHI001	Abe	Johnson
ABCDEFGHI002	Bill	Johnson
ABCDEFGHI003	Carl	Johnson
ABCDEFGHI004	Dick	Johnson
ABCDEFGHI005	Eric	Johnson
ABCDEFGHI006	Fred	Johnson
ABCDEFGHI007	Greg	Johnson
ABCDEFGHI008	Harv	Johnson
ABCDEFGHI009	Ira	Johnson

1 2 3 4 5 6 7 8 9 10 ... Next >

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

User Name  [ Search ]

Contact First Name

Contact Last Name

Telephone Number

E-Mail

Confirm E-Mail

Password

Confirm Password

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

**Clerk Roles**

Available Roles	Assigned Roles
<input type="checkbox"/> Prior Authorization	
<input type="checkbox"/> Eligibility	
<input type="checkbox"/> Trade Files	
<input type="checkbox"/> Claim Submission	
<input type="checkbox"/> 835 Designation	
<input type="checkbox"/> Demographic Maint	

Clerk Administrator

Remove Clerk Add Clerk Q Reset Password N

Submit Cancel

### *Clerk Maintenance Page*

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

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

## 6.1 Add a Clerk

1. Click **Add Clerk** located at the bottom of the page.

A new row serving as a placeholder for the new entry and marked with an *A* will be displayed, and the new record fields will become active.

The screenshot shows a web interface titled "Clerk Maintenance". At the top, it states "Required fields are indicated with an asterisk (\*)". Below this is a table with three columns: "User Name", "Contact First Name", and "Contact Last Name". The first row is highlighted in yellow and has an "A" in the first column, indicating it is a new entry. The other rows contain existing clerk information. Below the table is a form for adding a new record, with fields for "User Name\*", "Contact First Name\*", "Contact Last Name\*", "Telephone Number\*", "E-Mail\*", "Confirm E-Mail\*", "Password\*", and "Confirm Password\*". A search button is next to the User Name field. At the bottom of the form, there is a password requirement note: "Password must contain one uppercase letter, one number and at least 8 characters."

User Name	Contact First Name	Contact Last Name
A		
A2CLERK	a2	clerk
ABCDEFGH001	Abe	Johnson
ABCDEFGH002	Bill	Johnson
ABCDEFGH003	Carl	Johnson
ABCDEFGH004	Dick	Johnson
ABCDEFGH005	Eric	Johnson
ABCDEFGH006	Fred	Johnson
ABCDEFGH007	Greg	Johnson
ABCDEFGH008	Harv	Johnson

Type data below for new record.

User Name\*  [ Search ]

Contact First Name\*

Contact Last Name\*

Telephone Number\*

E-Mail\*

Confirm E-Mail\*

Password\*

Confirm Password\*

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

### *Clerk Maintenance Page with Added Row*

- If you are adding a new clerk account, complete the following steps:
  - a. Enter a **User Name**.

The User Name must be between 6-20 characters and can only contain letters and numbers. The User Name is not case-sensitive.
  - b. Enter the new clerk's name in the **Contact First Name** and **Contact Last Name** fields.
  - c. Enter the new clerk's **Telephone Number** (and extension, if applicable).
  - d. Enter the new clerk's **E-Mail** (twice for confirmation).
  - e. Enter an initial **Password** for the new clerk (twice for confirmation).

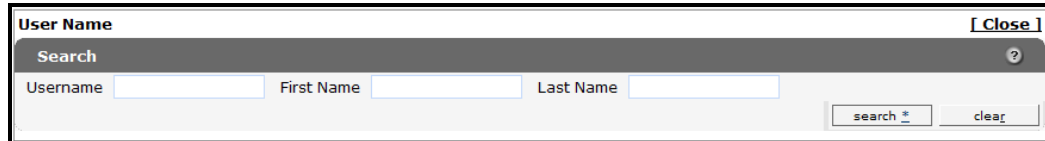
The Password must be between 8-15 characters and must contain three different types of characters such as upper-case letters, lower-case letters, special characters, or numbers. The Password must be unique and cannot

contain information from the user name, contact first name, contact last name, or the security answers.

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

- If you are adding a clerk account that has already been created but needs to be added to a new organization, complete the following steps:
  - a. Click **Search** to the right of the User Name field.

The **User Name Search** box will be displayed.



*User Name Search Box*

- b. Enter the clerk account's **Username**, **First Name**, or **Last Name**.
- c. Click **Search**.

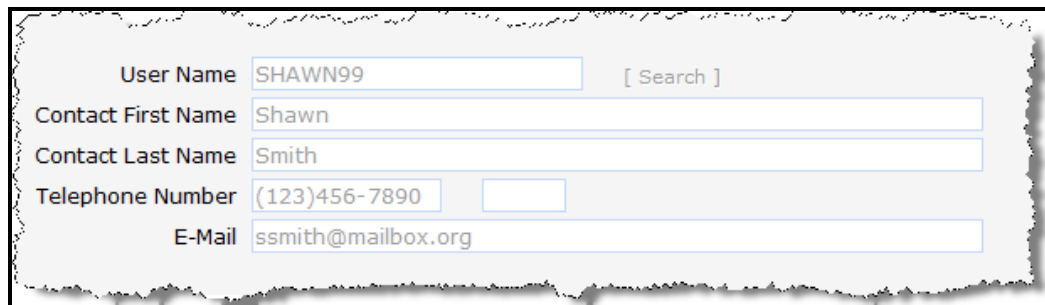
The **Search Results** section will be displayed.



*Search Results Section*

- d. Click the row of the desired clerk account.

The User Name Search box will close and the clerk account information will be auto-populated on the Clerk Maintenance page.



*Clerk Account Information Auto-populated on Clerk Maintenance Page*

2. Add roles to the clerk account.

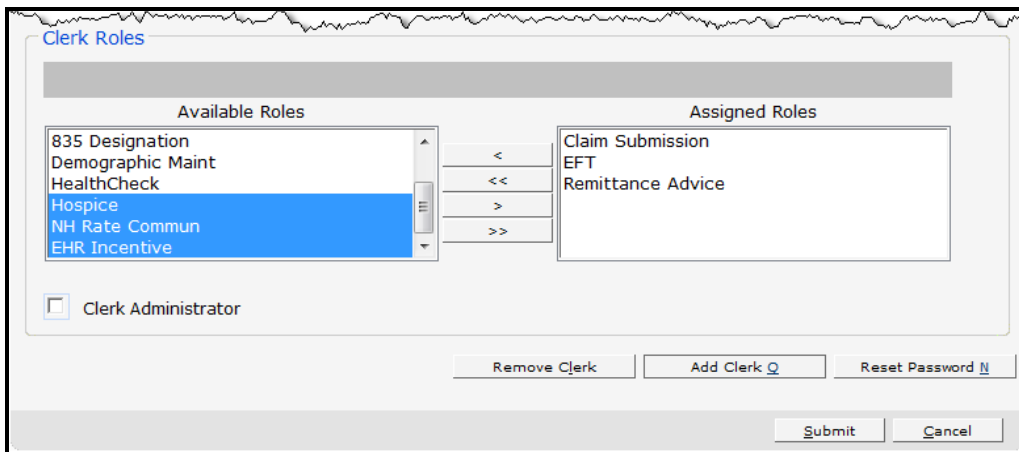
## 6.2 Add a Role to a Clerk

A role may be added to either a new or existing clerk.

- For a new clerk:

- Click **Add Clerk**.
  - The fields on the page will activate.
  - Enter account information in the appropriate fields.
- For an existing clerk:
- From the list at the top of the page, click the name of the clerk to whom you wish to assign a new role.
  - The fields on the page will auto-populate with the clerk's information.
1. In the **Clerk Roles** section, select a role(s) from the **Available Roles** listed.

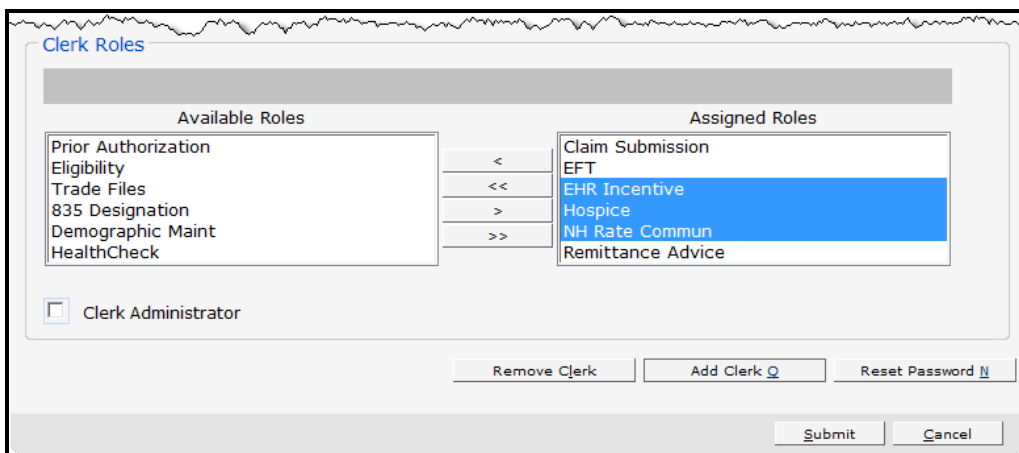
To select more than one row, hold down the **Ctrl** key and click all the roles you want to select.



*Clerk Roles Section with Available Roles*

2. Click **>**.
- To add all Available Roles to the clerk, click **>>**.

The selected role(s) will be added to the **Assigned Roles** box.



*Clerk Roles Section with Assigned Roles*

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

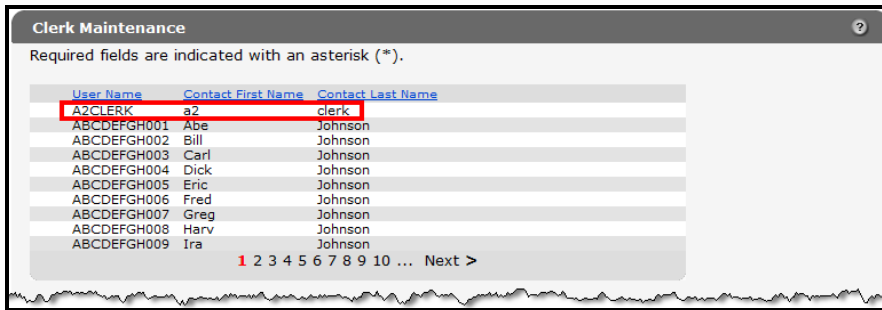
**The following messages were generated:**  
Clerk Maintenance - Save was Successful

*Save was Successful Message*

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

### 6.3 Remove a Role from a Clerk

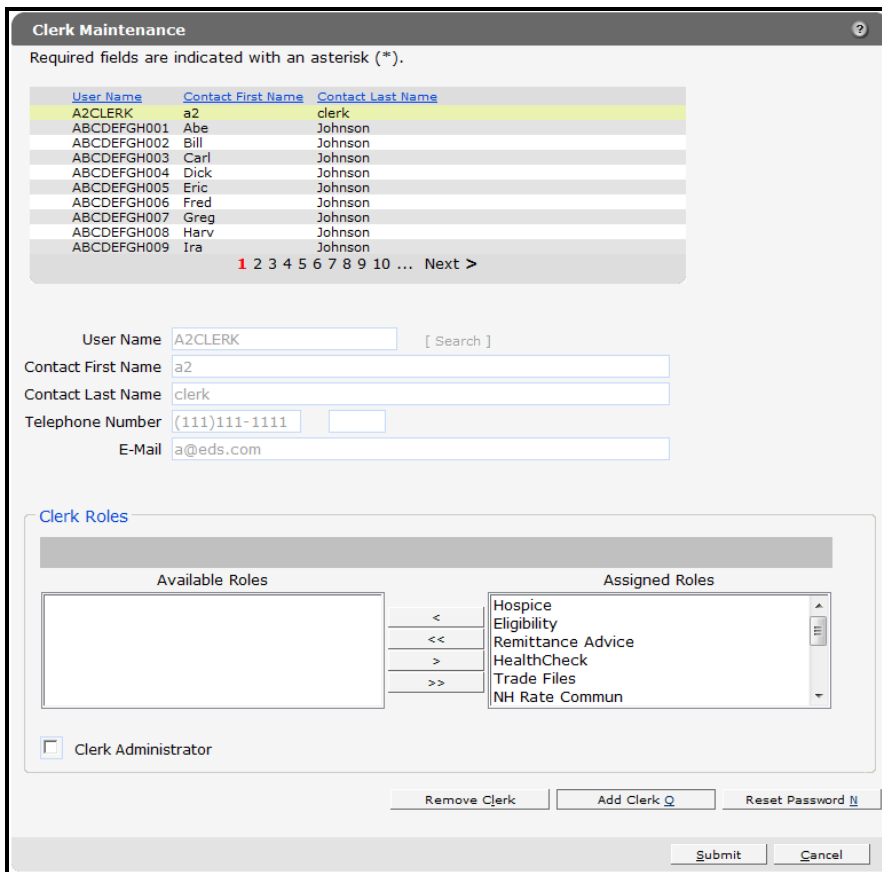
1. At the top of the **Clerk Maintenance** page, locate the clerk's **User Name**.



*Clerk Maintenance Page*

2. Click the row containing the desired clerk.

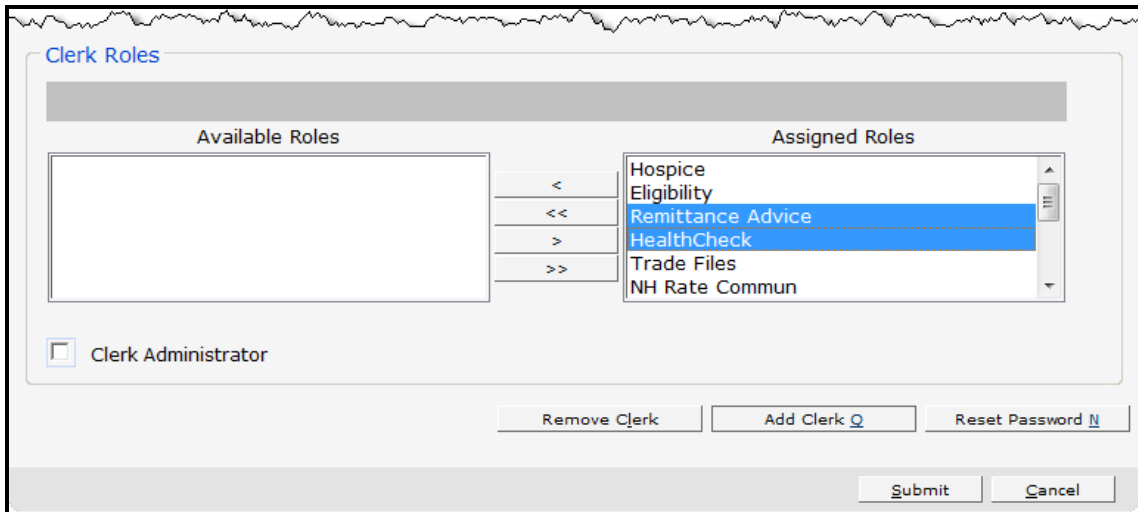
The fields on the page will auto-populate with the clerk's information.



*Clerk Maintenance Page*



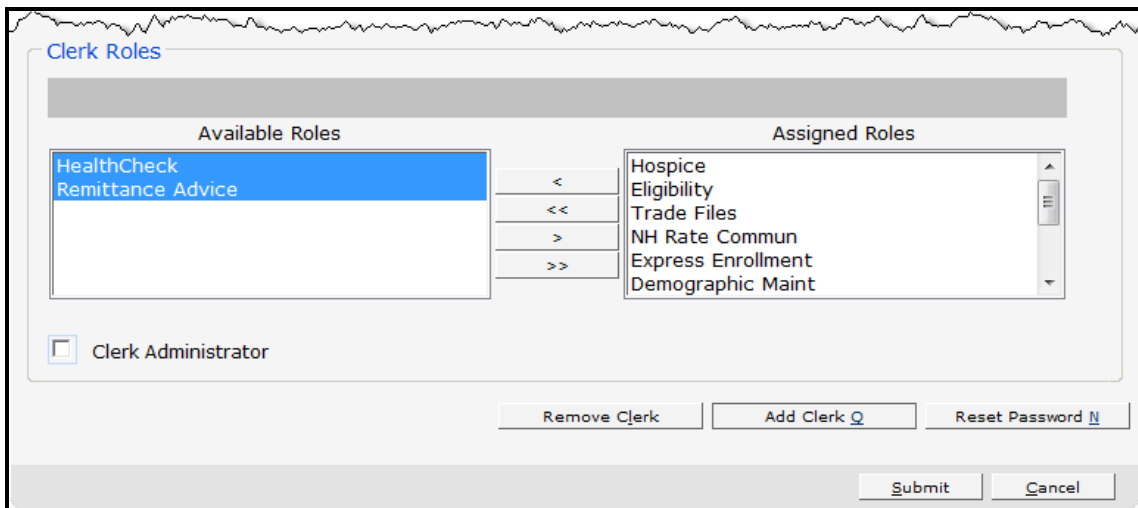
3. In the **Clerk Roles** section, select a role(s) from the **Assigned Roles** listed.  
To select more than one row, hold down the **Ctrl** key and click all the roles you want to remove.



*Clerk Roles Section with Assigned Roles*

4. Click **<**.
  - To remove all of a clerk's assigned roles, click **<<**.

The selected role(s) will be transferred to the **Available Roles** box.



*Clerk Roles Section*

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

**The following messages were generated:**  
Clerk Maintenance - Save was Successful

*Confirmation Message*

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

## 6.4 Assign a Clerk Administrator

A clerk with clerk administrative rights can create accounts for and manage clerks assigned to them.

1. Select an existing clerk or create a new clerk account.
2. Add the role(s) you want the clerk administrator to manage by clicking the role(s) in the **Available Roles** box.
3. Click the **Clerk Administrator** box.

Available Roles	Assigned Roles
Demographic Maint	Remittance Advice
HealthCheck	Claim Submission
Hospice	Eligibility
EFT	Prior Authorization
Express Enrollment	Trade Files
NH Rate Commun	835 Designation

Clerk Administrator

Remove Clerk Add Clerk Reset Password

Submit Cancel

*Clerk Roles Section*

4. Click **>**.
  - To assign management of all clerk roles to the clerk, click **>>**.The selected roles will be added to the clerk administrator's **Assigned Roles**.
5. Click **Submit**.

A confirmation message will be displayed at the top of the page.

**The following messages were generated:**  
Save was Successful

*Confirmation Message*

## 6.5 Reset a Clerk's Password

1. At the top of the Clerk Maintenance page, click the row containing the clerk's name.

User Name	Contact First Name	Contact Last Name
A2CLERK	a2	clerk
ABC001	Ginny	Johnson
ABCDEFGH001	Abe	Johnson
ABCDEFGH002	Bill	Johnson
ABCDEFGH003	Carl	Johnson
ABCDEFGH004	Dick	Johnson
ABCDEFGH005	Eric	Johnson
ABCDEFGH006	Fred	Johnson
ABCDEFGH007	Greg	Johnson
ABCDEFGH008	Harv	Johnson

1 2 3 4 5 6 7 8 9 10 ... Next >

### Clerk Maintenance Page

The fields on the page will auto-populate with the clerk's information.

**Clerk Maintenance**

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

User Name	Contact First Name	Contact Last Name
A2CLERK	a2	clerk
ABC001	Ginny	Johnson
ABCDEFGH001	Abe	Johnson
ABCDEFGH002	Bill	Johnson
ABCDEFGH003	Carl	Johnson
ABCDEFGH004	Dick	Johnson
ABCDEFGH005	Eric	Johnson
ABCDEFGH006	Fred	Johnson
ABCDEFGH007	Greg	Johnson
ABCDEFGH008	Harv	Johnson

1 2 3 4 5 6 7 8 9 10 ... Next >

Type changes below.

User Name:  [ Search ]

Contact First Name:

Contact Last Name:

Telephone Number:

E-Mail:

**Clerk Roles**

Available Roles: Eligibility, Trade Files, Demographic Maint, HealthCheck, Hospice, EFT

Assigned Roles: Claim Submission, Prior Authorization, 835 Designation

Clerk Administrator

Remove Clerk | Add Clerk | **Reset Password**

Submit | Cancel

### Clerk Maintenance Page with Auto-populated Information

2. Click **Reset Password**.

The **Reset Password** page will be displayed.

**Reset Password**

User Name:

New Password\*:

Confirm Password\*:

Password must contain one uppercase letter and one number.

Cancel | **Reset Password**

### Reset Password Page

3. Enter the **New Password** (twice for confirmation).

The password must be between 8-15 characters and must contain three different types of characters such as upper-case letters, lower-case letters, special characters, or numbers. The password must be unique and cannot contain information from the user name, contact first name, contact last name, or the security answers.

4. Click **Reset Password**.

A confirmation message will be displayed at the top of the page.

**The following messages were generated:**  
Password successfully reset. Click cancel button to return to Clerk Maintenance.

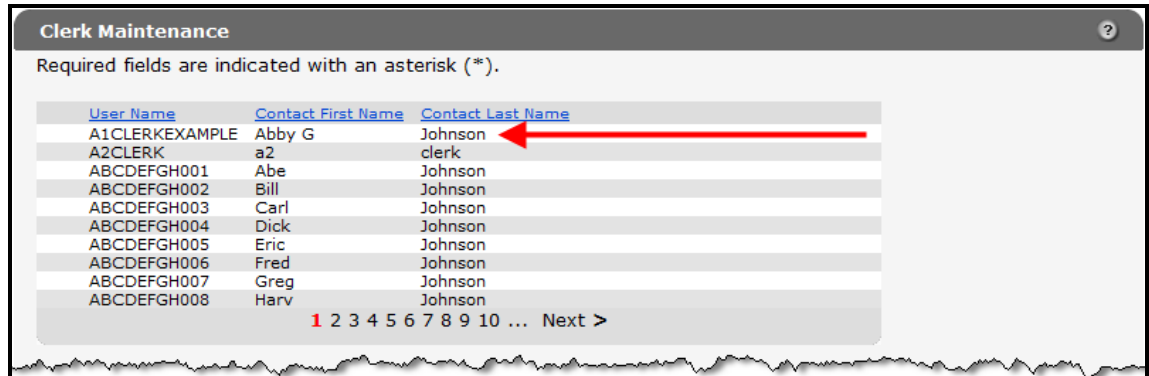
*Confirmation Message*

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

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

## 6.6 Delete a Clerk Account

1. At the top of the Clerk Maintenance page, click the row containing the clerk's name.



*Clerk Maintenance Page*

The fields on the page will auto-populate with the clerk's information.

**Clerk Maintenance**

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

User Name	Contact First Name	Contact Last Name
A1CLERKEXAMPLE	Abby G	Johnson
A2CLERK	a2	clerk
ABCDEF001	Abe	Johnson
ABCDEF002	Bill	Johnson
ABCDEF003	Carl	Johnson
ABCDEF004	Dick	Johnson
ABCDEF005	Eric	Johnson
ABCDEF006	Fred	Johnson
ABCDEF007	Greg	Johnson
ABCDEF008	Harv	Johnson

1 2 3 4 5 6 7 8 9 10 ... Next >

Type changes below.

User Name:  [ Search ]

Contact First Name:

Contact Last Name:

Telephone Number:

E-Mail:

**Clerk Roles**

Available Roles	Assigned Roles
HealthCheck Hospice NH Rate Commun	Eligibility Remittance Advice EHR Incentive Trade Files Express Enrollment Demographic Maint

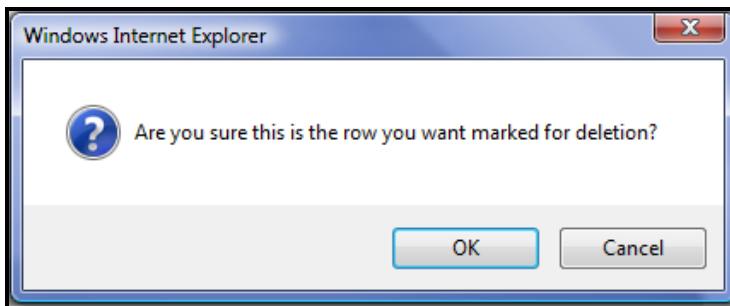
Clerk Administrator

**Remove Clerk** Add Clerk [Q](#) Reset Password [N](#)

Submit Cancel

*Clerk Maintenance Page with Auto-populated Information*

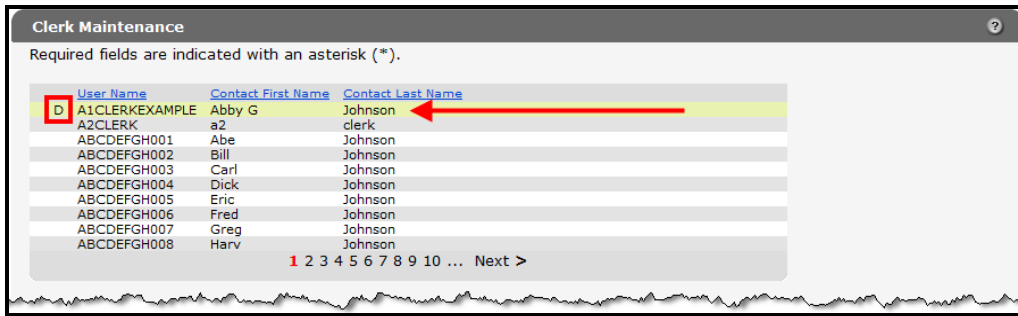
2. Click **Remove Clerk** to initiate the record deletion.  
A dialog box confirming the deletion will be displayed.



*Dialog Box*

3. Click **OK** to mark the row for deletion.

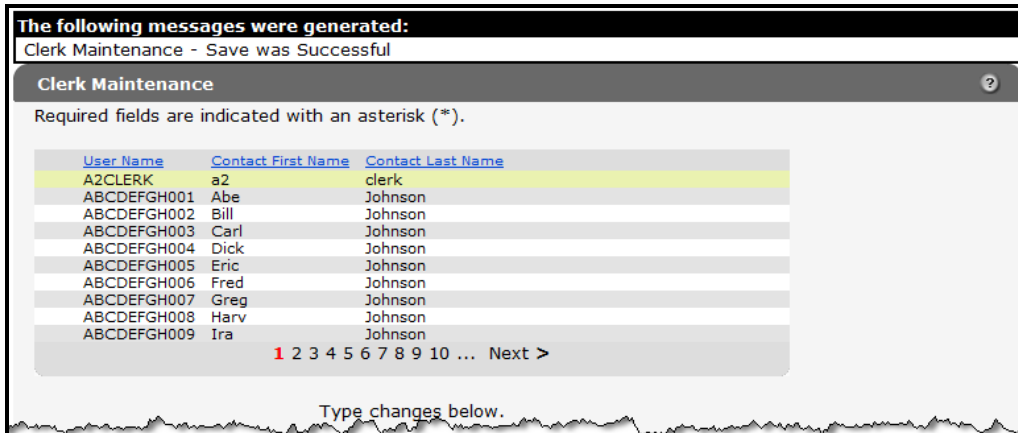
A *D* will be displayed at the beginning of the row marked for deletion.



*Clerk Maintenance Page with Row Marked for Deletion*

4. Click **Submit** to complete the clerk removal action. (The record is not deleted until Submit is clicked.)

A confirmation message will be displayed at the top of the page, and the record will no longer appear in the list of clerks.



*Clerk Maintenance Page with Confirmation Message*

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

## 7 Add Organization

The Add Organization function allows users with an administrative account to add multiple organizations to an existing Portal account. This feature offers the convenience of managing multiple organizations within one Provider Portal account as an alternative to creating separate Provider Portal accounts for each organization.

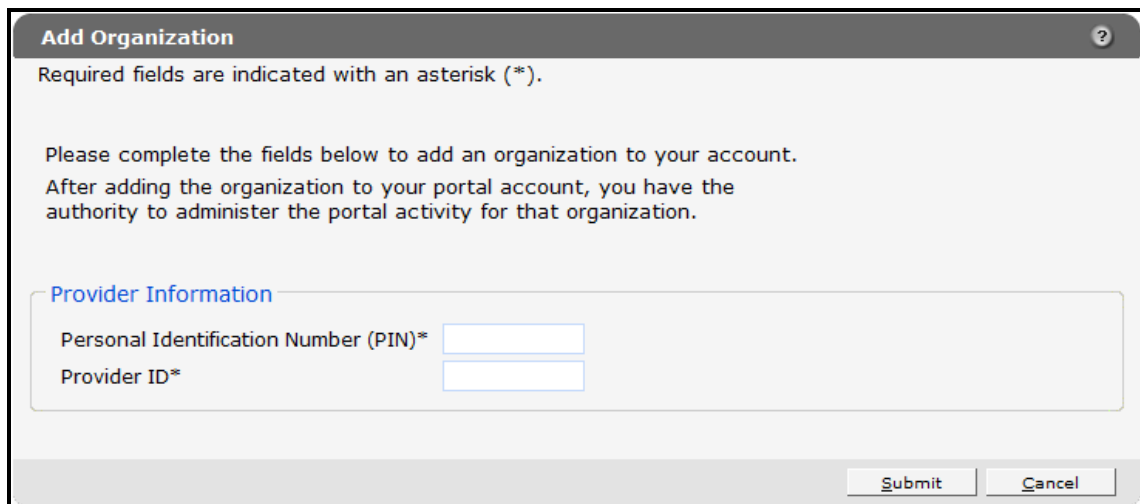
After adding an organization to an account, users with an administrative account are authorized to perform all tasks, as defined by the roles available for that organization.

In addition, account users granted the necessary permissions may move from one organization to another through the Switch Organization function without having to log out of the account.

To add an organization to an account:

1. Follow the steps in [Section 2 Request Portal Access](#) to request a PIN.
2. Once you have received the PIN letter, access the ForwardHealth Portal at <https://www.forwardhealth.wi.gov/>.
3. Log in to the account to which you wish to add the new organization.  
Your secure Provider page will be displayed.
4. Click **Account** on the main menu at the top of the page.  
The **Account Home** page will be displayed.
5. Click **Add Organization**.

The **Add Organization** page will be displayed.



**Add Organization** ?

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

Please complete the fields below to add an organization to your account.  
After adding the organization to your portal account, you have the authority to administer the portal activity for that organization.

**Provider Information**

Personal Identification Number (PIN)\*

Provider ID\*

Submit Cancel

*Add Organization Page*

6. Enter the **Personal Identification Number (PIN)** sent to the organization in the PIN letter.

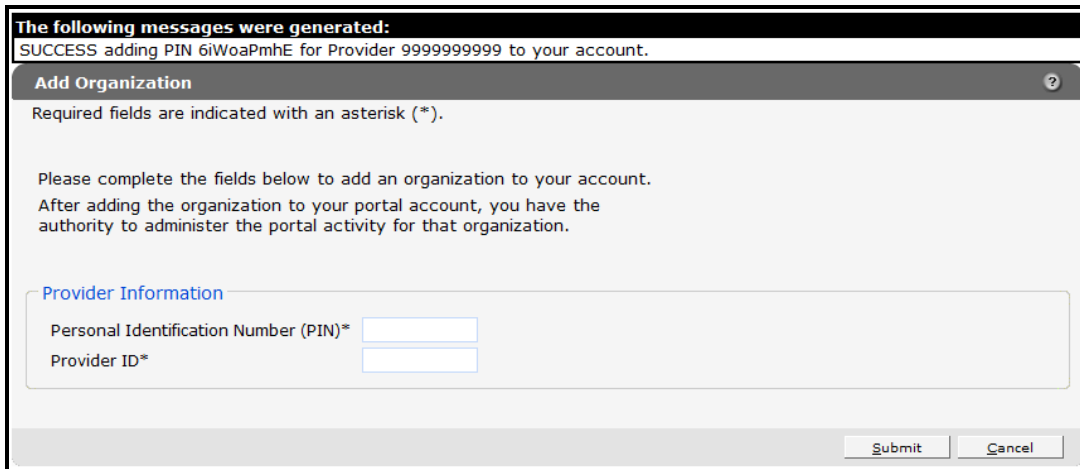
---

**Note:** Each organization needs to request and receive a PIN in order to be added to an existing Portal account. After receiving a PIN, users should follow the steps for adding an organization to an existing account instead of the steps outlined in Section 3 Set Up An Account.

---

7. Enter the provider's NPI or the Medicaid Provider ID in the **Provider ID** field.
8. Click **Submit**.

A confirmation message will be displayed at the top of the page.



*Add Organization Page with Confirmation Message*

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

Once the organization is added to the Portal account, the user will be able to return to the Account Home page to switch to and perform tasks for the new organization's account.

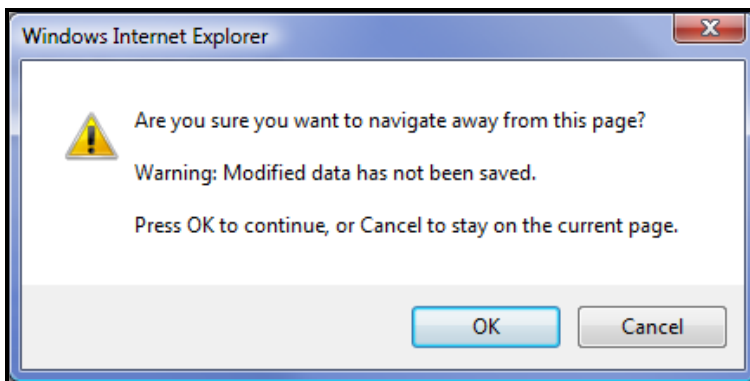
---

**Note:** If an administrative account has a new organization added to it, clerks set up under the initial organization are not automatically linked to the new organization. Clerk administrative and clerk accounts need to be added to the new organization via the Clerk Maintenance function. See [Section 6.1 Add a Clerk](#).

---

9. Click **Account** on the main menu at the top of the page to return to the Account Home page.

A dialog box will be displayed.



*Dialog Box*



10. Click **OK**.

The **Account Home** page will be displayed.

11. See [Section 8 Switch Organization](#) for information about switching to the added organization.

## 8 Switch Organization

Under the Switch Organization function:

- Users with administrative and clerk administrative accounts may assign role(s) to a clerk for a different organization within the same account without logging off.
- Clerks may perform tasks on behalf of multiple organizations within the same account without logging off.
- Users may change their default login organization.

### 8.1 Switch to Organization

1. On the Account Home page, click **Switch Organization**.

The **Switch Organization** page will be displayed.

You are logged in with NPI: 1234567890, Taxonomy Number: 100RC0000X, Zip Code: 53703, Financial Payer: Medicaid

Account » Switch Organization

#### Switch Organization

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

NPI	Provider ID	Address	City	State	ZIP	ZIP + 4	Taxonomy	Provider Type	Payer	Default Provider ID
1234567890	01234567	92 E 88TH ST STE 300	MADISON	WI	53703		100RC0000X	Internal Medicine	Medicaid	<input checked="" type="checkbox"/>
0090970097	40046400	21 MAIN ST	LA CROSEE	WI	54601		000U00000X	Independent Lab	Medicaid	<input type="checkbox"/>
1711711711	39003900	55 E OAK AVE	OSHKOSH	WI	54901		3000P1111X	Home Health/Personal Care Agency	Medicaid	<input type="checkbox"/>

Select row above to update.

**Currently Selected Provider**

Current Provider

**Newly Selected Provider**

NPI  
Address  
City  
State  
ZIP -

Provider ID  
Taxonomy  
Provider Type  
Default Provider ID   
Payer

Switch To Set As Default

#### Switch Organization Page

The NPI or Provider ID that you are currently logged in under will be displayed at the top of the page and a list of available organizations for that account will be displayed below.

2. To switch organizations, click on the row containing the desired organization.

The organization's information will auto-populate in the **Currently Selected Provider** and **Newly Selected Provider** sections.

NPI	Provider ID	Address	City	State	ZIP	ZIP + 4	Taxonomy	Provider Type	Payer	Default Provider ID
1234567890	01234567	92 E 88TH ST STE 300	MADISON	WI	53703		100RC0000X	Internal Medicine	Medicaid	<input checked="" type="checkbox"/>
0090970097	40046400	21 MAIN ST	LA CROSEE	WI	54601		000U00000X	Independent Lab	Medicaid	<input type="checkbox"/>
1711711711	39003900	55 E OAK AVE	OSHKOSH	WI	54901		3000P1111X	Home Health/Personal Care Agency	Medicaid	<input type="checkbox"/>

Select row above to update.

Currently Selected Provider

Current Provider 0090970097

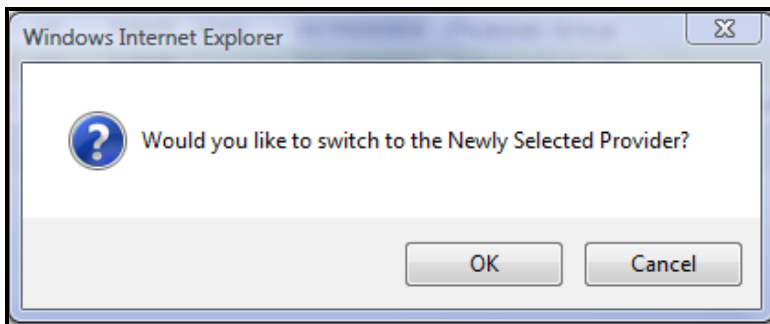
Newly Selected Provider

NPI 0090970097      Provider ID 40046400  
Address 21 MAIN ST      Taxonomy 000U00000X  
City LA CROSSE      Provider Type Independent Lab  
State WI      Default Provider ID   
ZIP 54601 -      Payer Medicaid

Switch To    Set As Default

*Switch Organization Page with Auto-populated Information*

3. If you wish to switch to the selected organization’s account, click **Switch To**.  
A dialog box will appear to confirm your selection.



*Dialog Box*

4. Click **OK**.  
You will be returned to the secure Provider page. The NPI you switched to will be displayed at the top of the page.

You are logged in with NPI: 0090970097, Taxonomy Number: 000U00000X, Zip Code: 54601, Financial Payer: Medicaid

*Log In Information*

## 8.2 Set As Default Login Organization

1. To make an organization your default login user, on the Switch Organization page, click the row of the desired organization.

The organization’s information will auto-populate in the **Currently Selected Provider** and **Newly Selected Provider** sections.

**Switch Organization** ?

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

NPI	Provider ID	Address	City	State	ZIP	ZIP + 4	Taxonomy	Provider Type	Payer	Default Provider ID
1396713967	38003800	1 SHARP RD	WATERFORD	WI	53185		200000000X	Physician Group	Medicaid	<input checked="" type="checkbox"/>
1609816098	24002400	24 PLINE RD	MADISON	WI	53719		200R00000X	Physician	Medicaid	<input type="checkbox"/>

Select row above to update.

**Currently Selected Provider**

Current Provider 1609816098

**Newly Selected Provider**

NPI 1609816098      Provider ID 24002400  
Address 24 PLINE RD      Taxonomy 200R00000X  
City MADISON      Provider Type Physician  
State WI      Default Provider ID   
ZIP 53719      Payer Medicaid

Switch To   **Set As Default**

*Switch Organization Page with Auto-populated Information*

2. Click **Set As Default**.

The Switch Organization page will refresh and check marks will be displayed in the **Default Provider ID** boxes for the selected organization.

**Switch Organization** ?

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

NPI	Provider ID	Address	City	State	ZIP	ZIP + 4	Taxonomy	Provider Type	Payer	Default Provider ID
1396713967	38003800	1 SHARP RD	WATERFORD	WI	53185		200000000X	Physician Group	Medicaid	<input type="checkbox"/>
1609816098	24002400	24 PLINE RD	MADISON	WI	53719		200R00000X	Physician	Medicaid	<input checked="" type="checkbox"/>

Select row above to update.

**Currently Selected Provider**

Current Provider 1609816098

**Newly Selected Provider**

NPI 1609816098      Provider ID 24002400  
Address 24 PLINE RD      Taxonomy 200R00000X  
City MADISON      Provider Type Physician  
State WI      **Default Provider ID**   
ZIP 53719      Payer Medicaid

Switch To   Set As Default

*Switch Organization Page*

The selected organization will automatically be the user each time you log into your account.

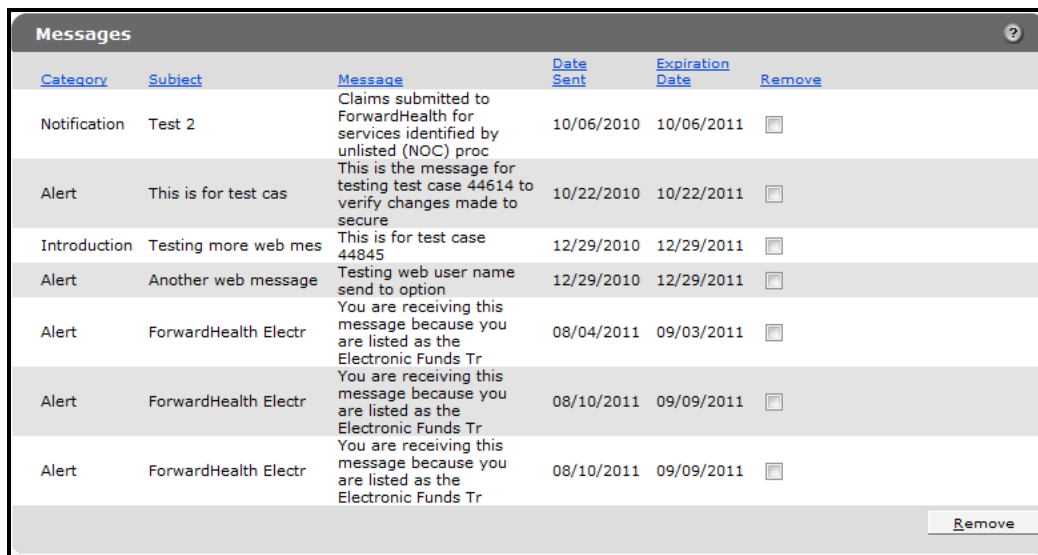
## 9 Messages

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

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

1. On the Account Home page, click **Messages**.

The **Messages** page will be displayed.



Category	Subject	Message	Date Sent	Expiration Date	Remove
Notification	Test 2	Claims submitted to ForwardHealth for services identified by unlisted (NOC) proc	10/06/2010	10/06/2011	<input type="checkbox"/>
Alert	This is for test cas	This is the message for testing test case 44614 to verify changes made to secure	10/22/2010	10/22/2011	<input type="checkbox"/>
Introduction	Testing more web mes	This is for test case 44845	12/29/2010	12/29/2011	<input type="checkbox"/>
Alert	Another web message	Testing web user name send to option	12/29/2010	12/29/2011	<input type="checkbox"/>
Alert	ForwardHealth Electr	You are receiving this message because you are listed as the Electronic Funds Tr	08/04/2011	09/03/2011	<input type="checkbox"/>
Alert	ForwardHealth Electr	You are receiving this message because you are listed as the Electronic Funds Tr	08/10/2011	09/09/2011	<input type="checkbox"/>
Alert	ForwardHealth Electr	You are receiving this message because you are listed as the Electronic Funds Tr	08/10/2011	09/09/2011	<input type="checkbox"/>

### *Messages Page*

2. Click the desired message.

If there is only one message, the message and Message section will be displayed automatically.

The **Message** section will be displayed at the bottom of the page.

Alert ForwardHealth Electr Electronic Funds Tr  
You are receiving this message because you are listed as the Electronic Funds Tr  
08/10/2011 09/09/2011

Remove

**Message** ?

Category Alert

Subject ForwardHealth Electronic Funds Transfer: Notice of EFT Account Information Changed

You are receiving this message because you are listed as the Electronic Funds Transfer (EFT) contact and/or the Portal Administrator for the following ForwardHealth Provider:

Provider ID/NPI: 1234567890  
Taxonomy Number: 100RC0000X(if applicable)  
Zip Code: 53703  
Financial Payer: TXIX

This message is to inform you that key EFT Account information has been changed for this Provider's EFT. EFT Account information may include:

- Financial Institution information
- Account number
- Account type
- Account holder name

To view the specific changes made to your provider's EFT Account information, please log on to your secure ForwardHealth Portal Account and review the EFT History for this provider. The EFT History will describe the change(s) that were made and where they originated.

Some EFT Account information may be changed as a result of information received directly from the bank/financial institution. You should already have been made aware of these changes by your bank; however, if you have not been made aware of bank-authorized changes, please contact your bank/financial institution to verify any change(s) made.

Some EFT Account information may be changed by Portal Administrators or Authorized Portal Users (Authorized PortalUsers are portal users who have been granted access to the "EFT role" by the Portal Administrator). Portal Administrators can control access to all EFT information by granting/restricting access to the "EFT role" on the Portal. If you believe the EFT Account information was incorrectly changed by a Portal user, please work with your Portal Administrator to correct the information and rectify any inappropriate access by users.

If you have any questions regarding this message, please contact Provider Services at (800) 947-9627.

Sincerely,  
ForwardHealth

Date Sent 08/10/2011  
Expiration Date 09/09/2011

*Message Section*

3. To delete a message:
  - a. Click the **Remove** box next to the message.

Category	Subject	Message	Date Sent	Expiration Date	Remove
Notification	Test 2	Claims submitted to ForwardHealth for services identified by unlisted (NOC) proc	10/06/2010	10/06/2011	<input type="checkbox"/>
Alert	This is for test cas	This is the message for testing test case 44614 to verify changes made to secure	10/22/2010	10/22/2011	<input type="checkbox"/>
Introduction	Testing more web mes	This is for test case 44845	12/29/2010	12/29/2011	<input type="checkbox"/>
Alert	Another web message	Testing web user name send to option	12/29/2010	12/29/2011	<input type="checkbox"/>
Alert	ForwardHealth Electr	You are receiving this message because you are listed as the Electronic Funds Tr	08/04/2011	09/03/2011	<input type="checkbox"/>
Alert	ForwardHealth Electr	You are receiving this message because you are listed as the Electronic Funds Tr	08/10/2011	09/09/2011	<input type="checkbox"/>
Alert	ForwardHealth Electr	You are receiving this message because you are listed as the Electronic Funds Tr	08/10/2011	09/09/2011	<input checked="" type="checkbox"/>

[Remove](#)

*Messages Page*

- b. Click **Remove**.

The message will be deleted from the Messages page.