ForwardHealth Provider Portal

Account User Guide

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1 Introduction

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/*.
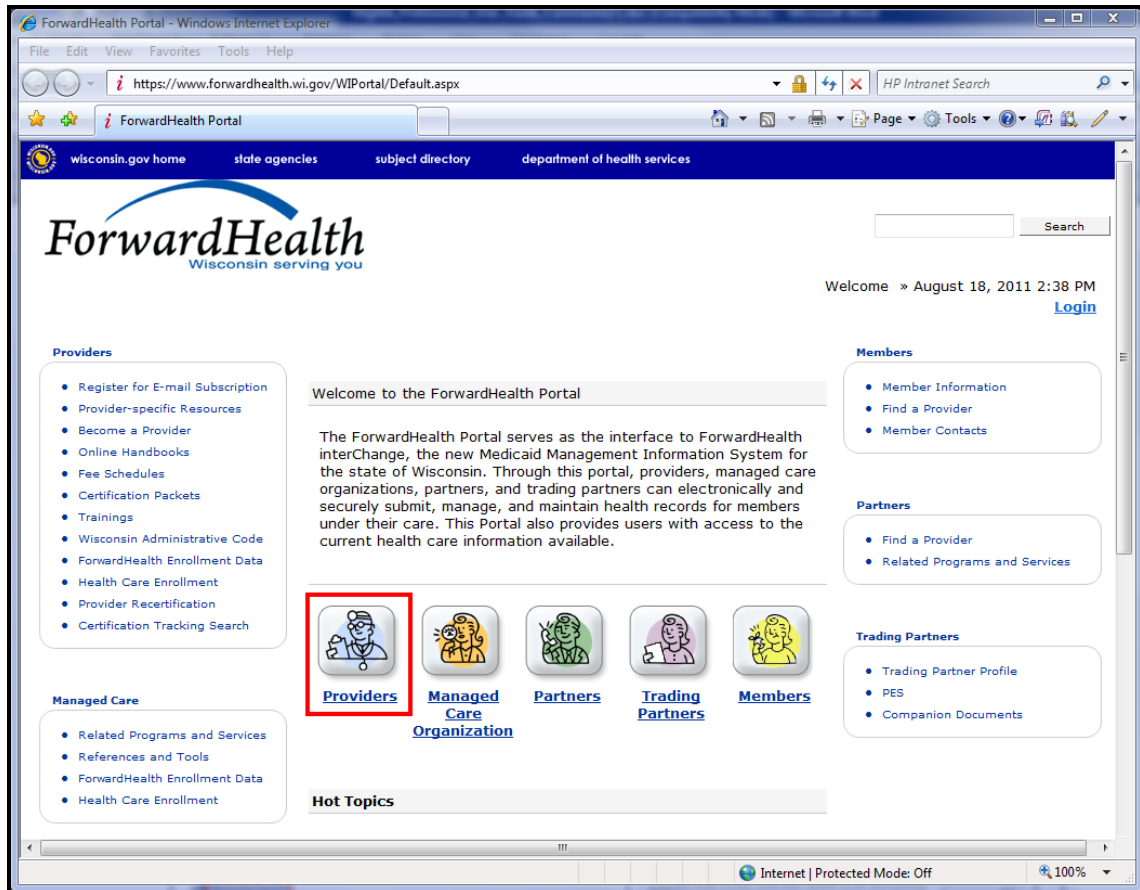
ForwardHealth Portal Page

2. Click **Providers**.

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

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 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 Page

6. Click the appropriate row from the ForwardHealth Certifications for Requested NPI section.
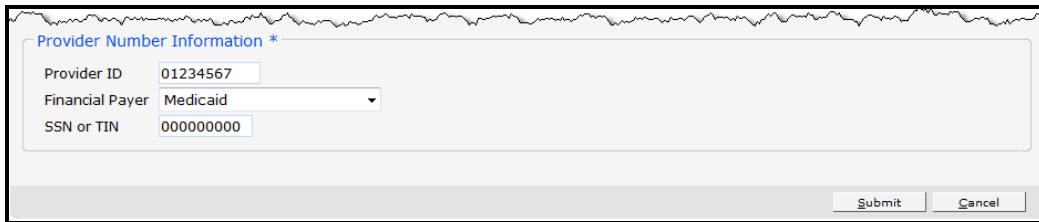
The **Selected NPI** section will auto-populate with the selected information.

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.
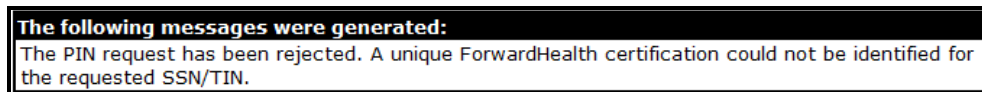

Provider Number Information Section

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:

- o **No provider agreement on file**. Call Provider Services at 1-800-947-9627 for the agreement.
- o **SSN or TIN number is incorrect**. Check the number and enter the correct number.
- o **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.

PIN Letter

3 Set Up An Account

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/*.
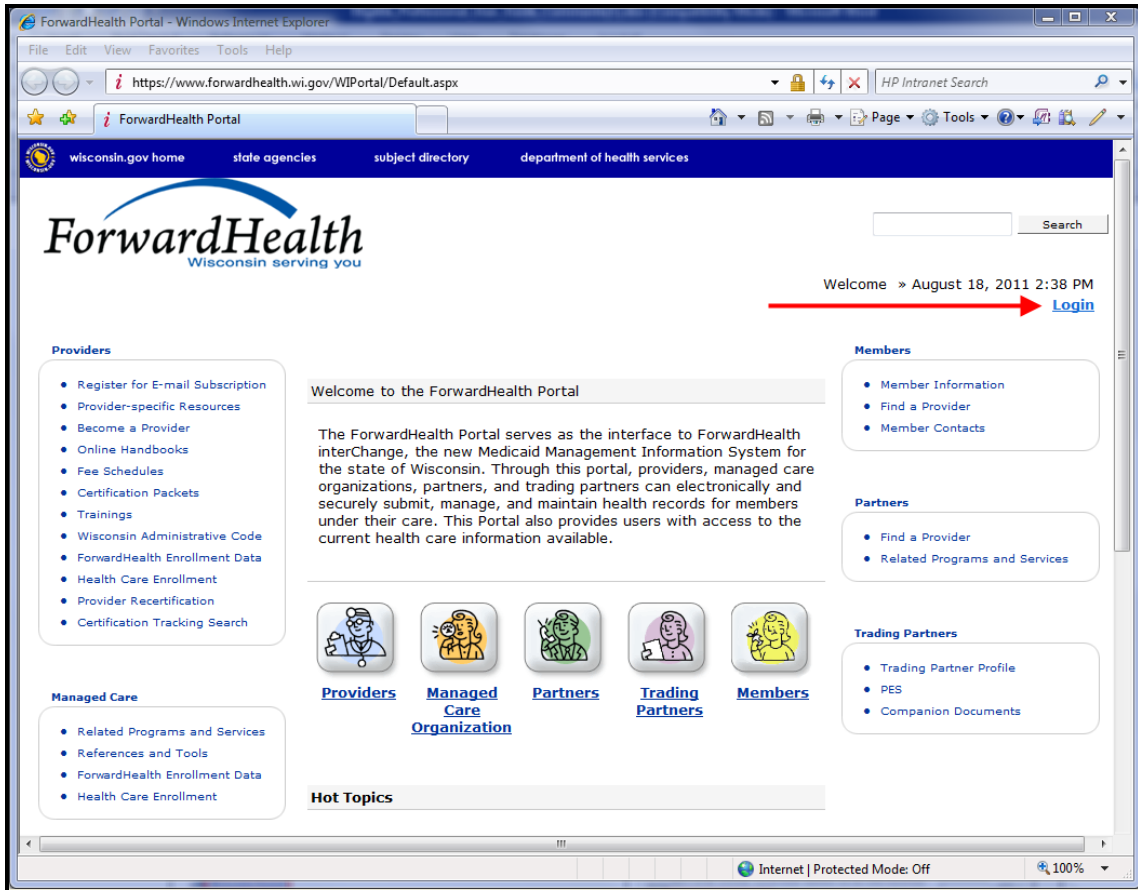
ForwardHealth Portal Page

2. Click **Login**.

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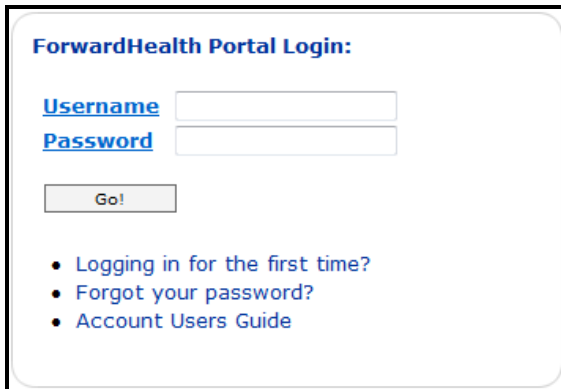
ForwardHealth Portal Login

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

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

Account Setup 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 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.

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

- 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**.
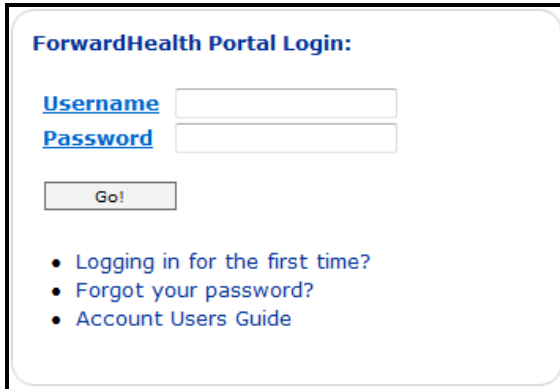
Your secure Provider page will be displayed.

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.
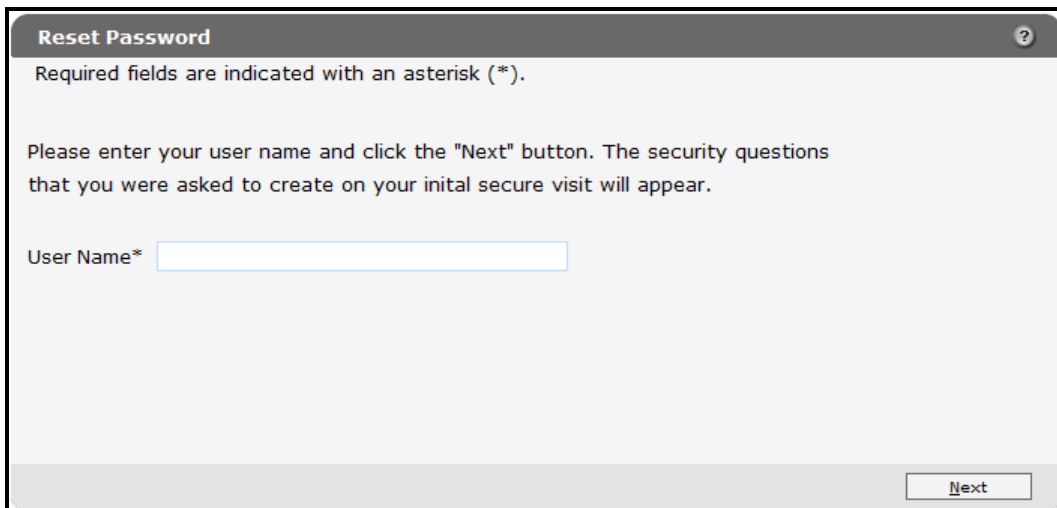
   ForwardHealth Portal Login:

   Username [_____]
   Password [_____]

   [Go!]

   - 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 inital secure visit will appear.

   User Name* [_____]

                                                                          [Next]

   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.

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.

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.

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.

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 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.

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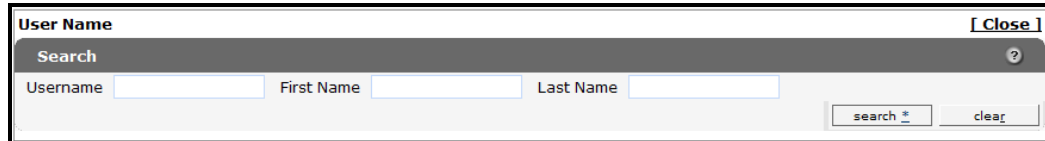
      The Password must be between 8-15 characters and must contain three different types of characters such as upper-case letters, lower-case letters, special characters, or numbers. The Password must be unique and cannot

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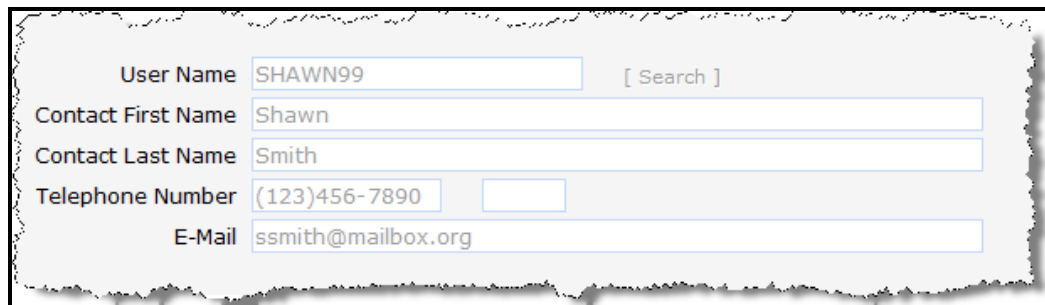
   The **Search Results** section will be displayed.

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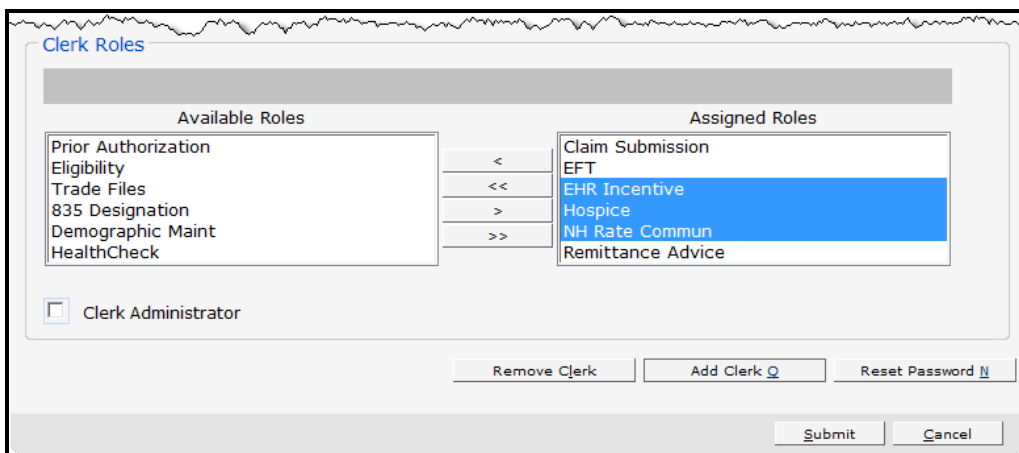
   To select more than one row, hold down the **Ctrl** key and click all the roles you want to select.
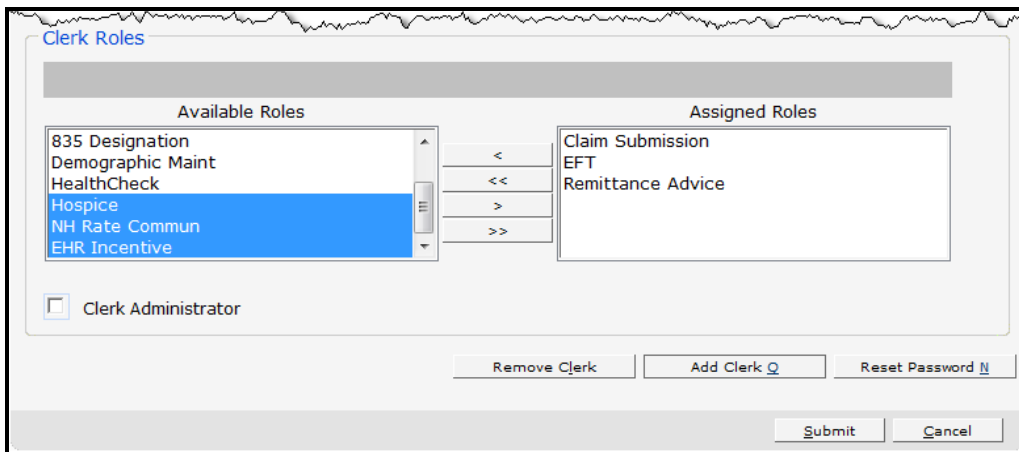
Clerk Roles Section with Available Roles

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**.
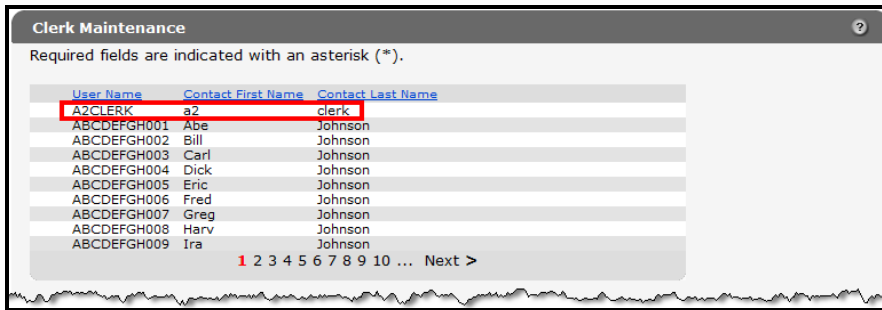
Clerk Maintenance Page

2. Click the row containing the desired clerk.

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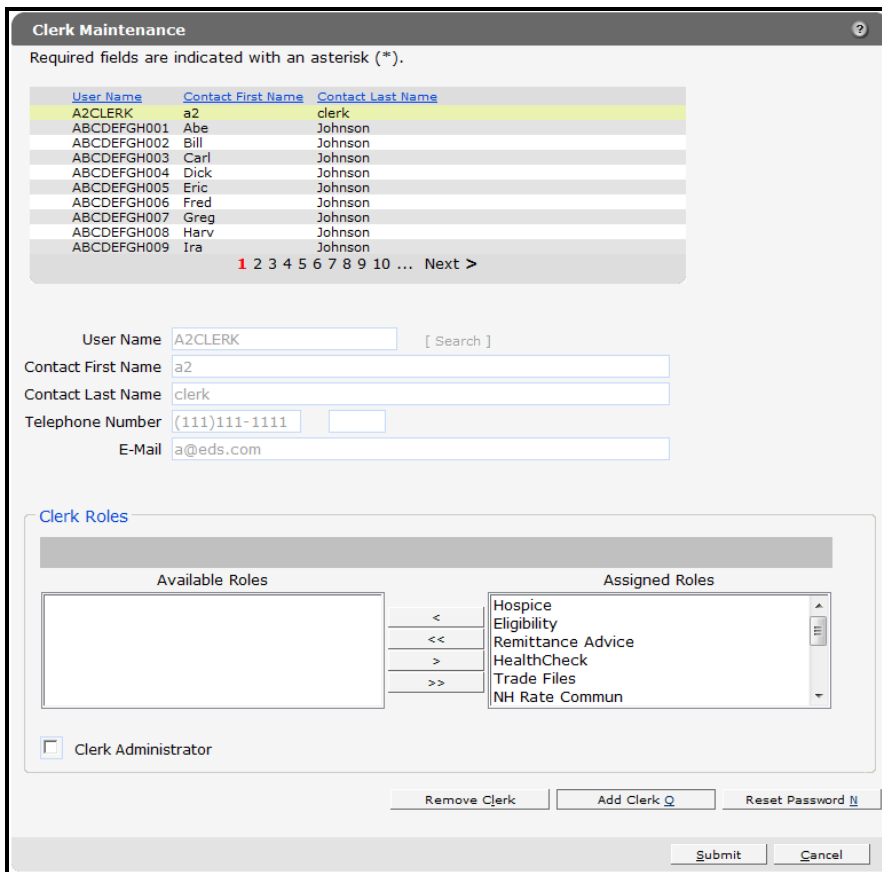
Clerk Maintenance Page

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.
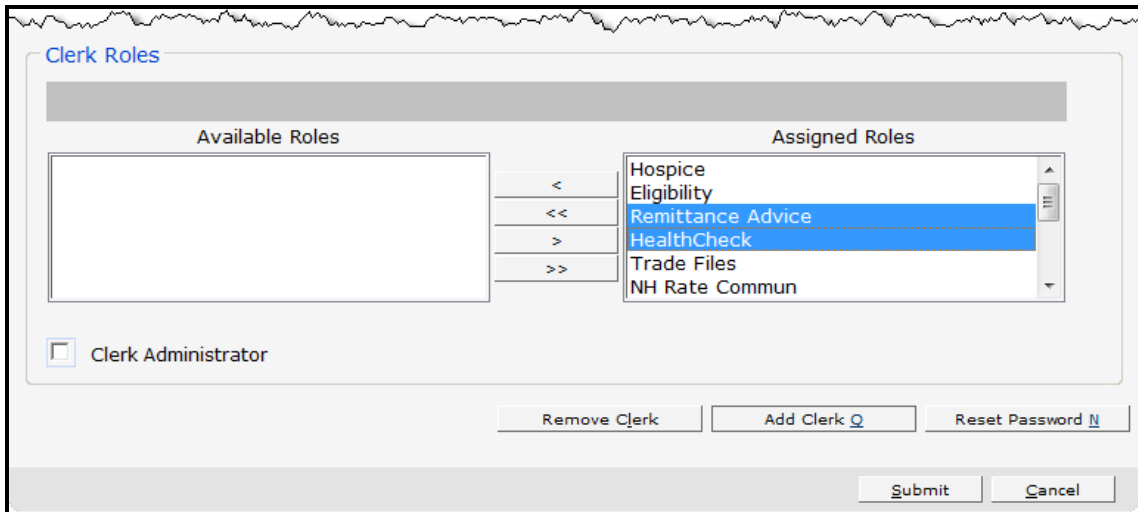
Clerk Roles Section with Assigned Roles

4. Click **<**.

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

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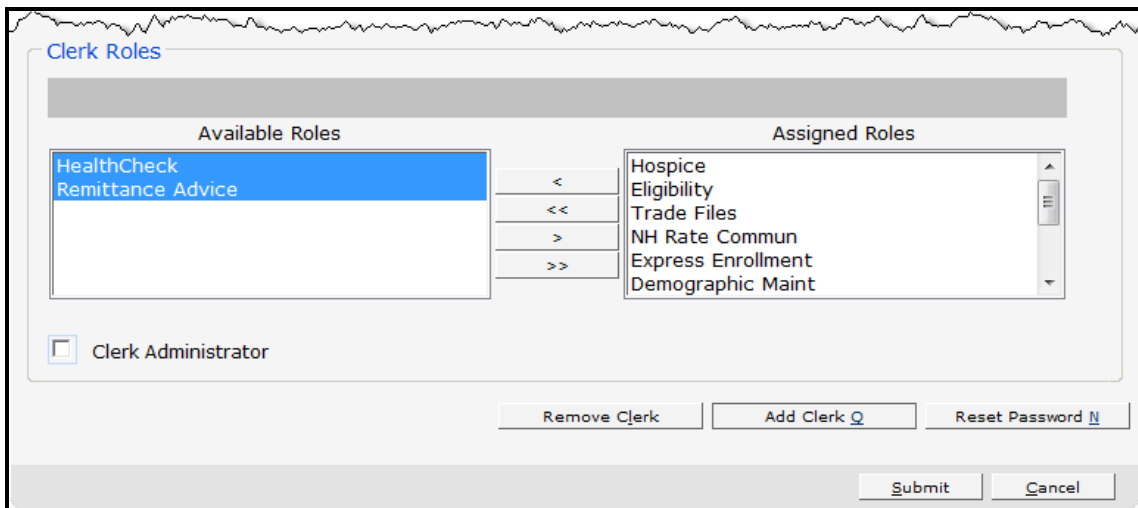
Clerk Roles Section

5. Click **Submit**.

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

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.

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.

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.

Clerk Maintenance Page

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

Clerk Maintenance Page with Auto-populated Information

2. Click **Reset Password.**

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

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 sucessfully 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 Page with Auto-populated Information

2. Click **Remove Clerk** to initiate the record deletion.

   A dialog box confirming the deletion will be displayed.
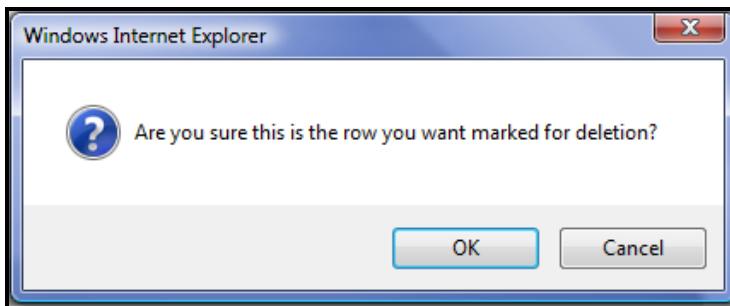
Dialog Box

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

A *D* will be displayed at the beginning of the row marked for deletion.
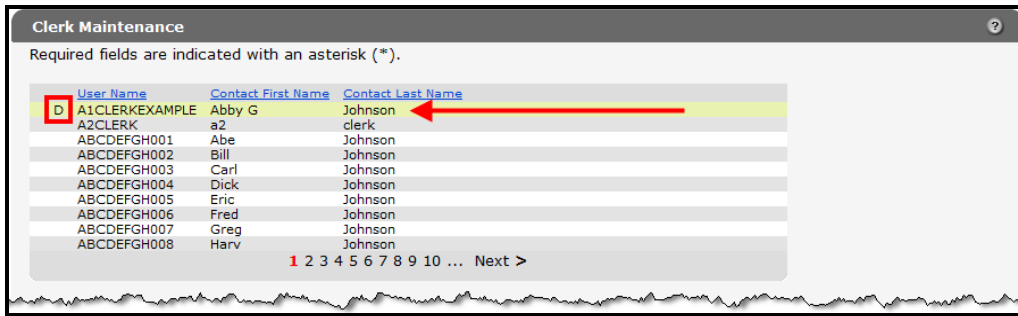
Clerk Maintenance Page with Row Marked for Deletion

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.
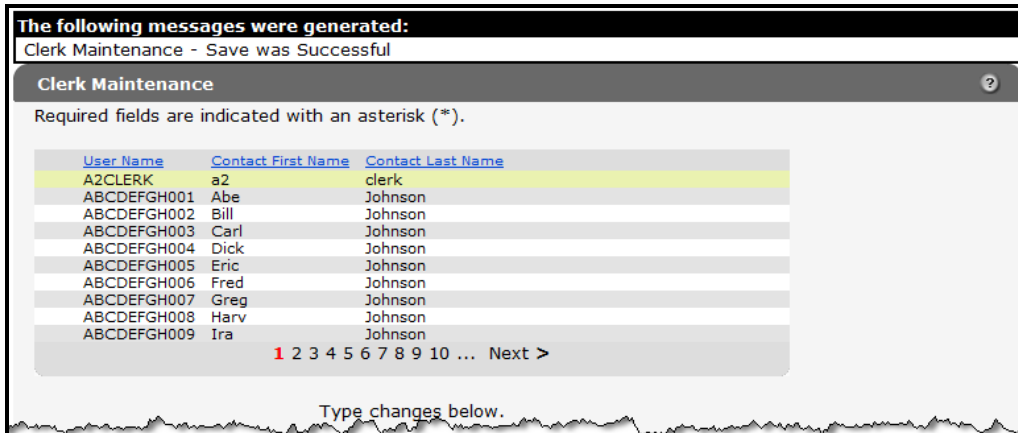
Clerk Maintenance Page with Confirmation Message

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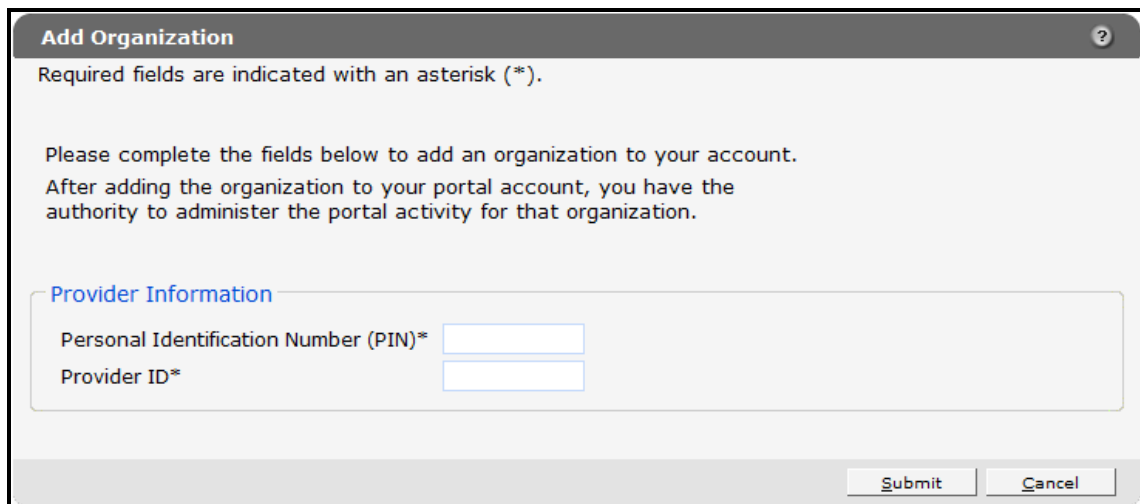
After adding an organization to an account, users with an administrative account are authorized to perform all tasks, as defined by the roles available for that organization.

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 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.
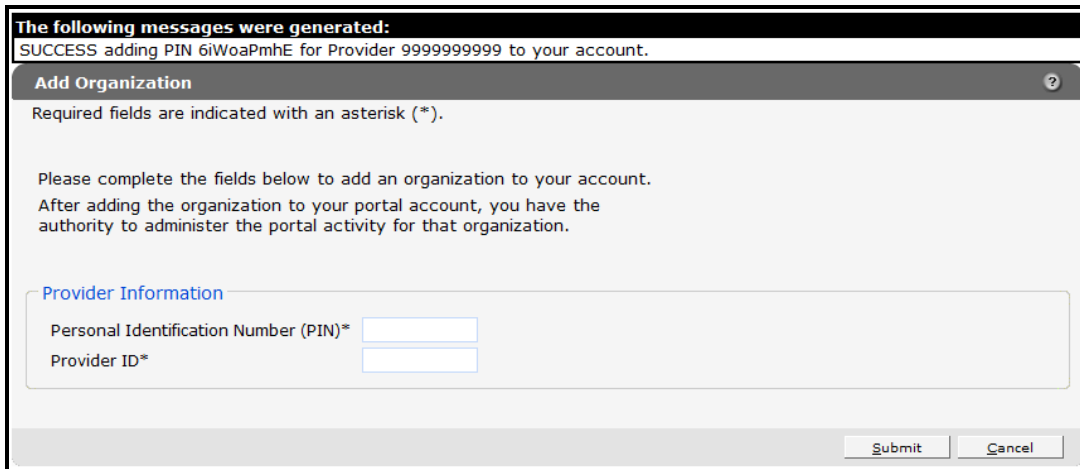
Add Organization Page with Confirmation Message

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.
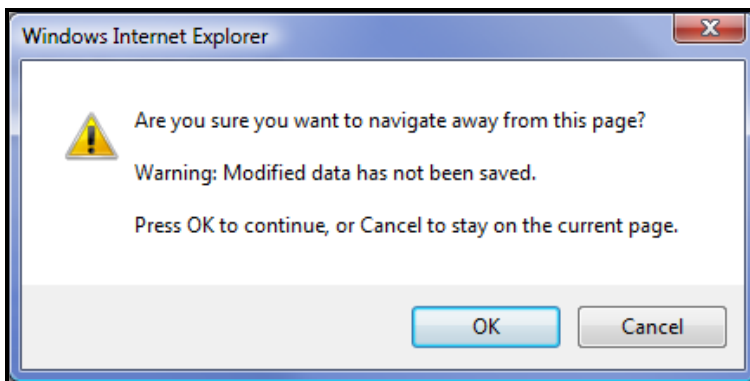
Dialog Box

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.

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.

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.
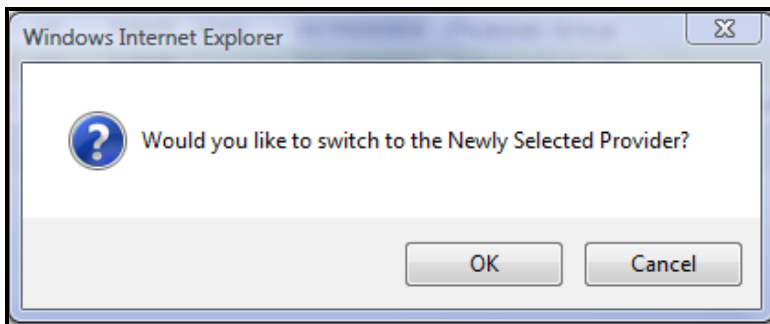
Dialog Box

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.

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 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 Page

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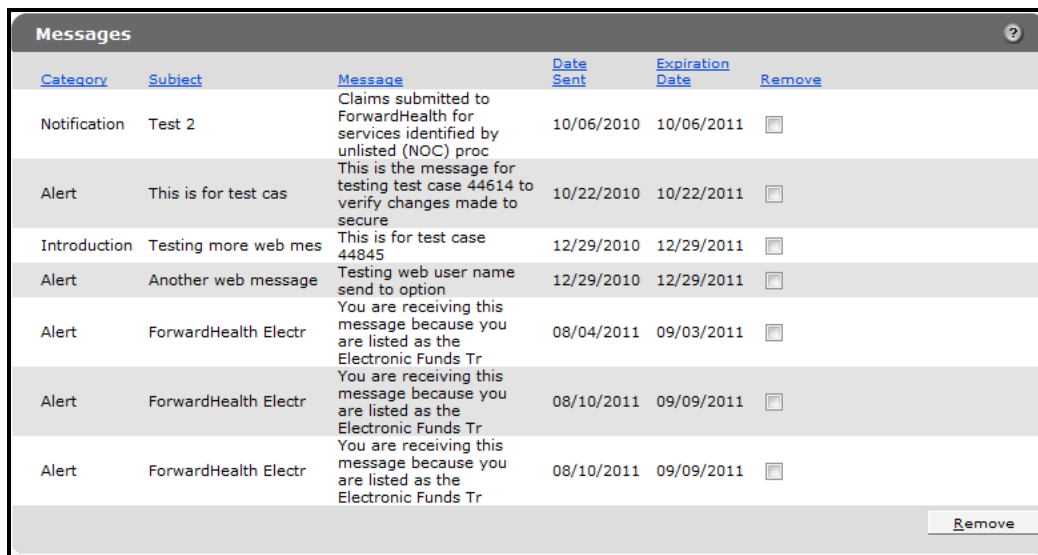
9 Messages

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.

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.

Message Section

3. To delete a message:

   a. Click the **Remove** box next to the message.

Messages Page

b. Click **Remove**.

The message will be deleted from the Messages page.