User Guide

Children's Long-Term Support Waiver Agency Portal

April 28, 2025

WISCONSIN DEPARTMENT of HEALTH SERVICES

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1 Getting Started

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

The Portal allows authorized Children's Long-Term Support (CLTS) users to conduct business through a secure entry point 24 hours a day, seven days a week.

1.1 New Waiver Agencies

When a waiver agency requests an administrative Portal account for the first time, an agency representative will contact the Wisconsin Bureau of Children's Services (BCS), who will create the user in the system. Once the new user is created, a PIN letter will be sent to the waiver agency's administrator to grant access to the user.

Access to the secure Portal is **not** possible without a PIN. The letter also includes a Login ID, which is a health care provider's National Provider Identifier (NPI) or a non-healthcare provider's Medicaid Provider ID or Waiver Agency ID. For security purposes, the Login ID contains only digits three–six of the NPI or Provider ID.

With the PIN letter, the waiver agency user can begin setting up their account and using the Portal. This includes creating other users for the waiver agency. Refer to the Clerk Maintenance, Waiver Agency Portal Administrator Change Request, Administrator Backup Information, and Clerk Last Logon chapters for more information about adding clerks and other administrative clerk functions.

1.2 Help Desk Information

Users who encounter any issues with Portal functionality should contact the Portal Help Desk at 866-908-1363.

Users who encounter any issues with enrollment dates, recertification dates, level of care, and monthly parental fees should contact the BCS Technical Assistance Center (TAC) at DHSBCSTAC@dhs.wisconsin.gov.

2 Accessing the Secure Waiver Agency Page

1. Access the Portal at forwardhealth.wi.gov/.

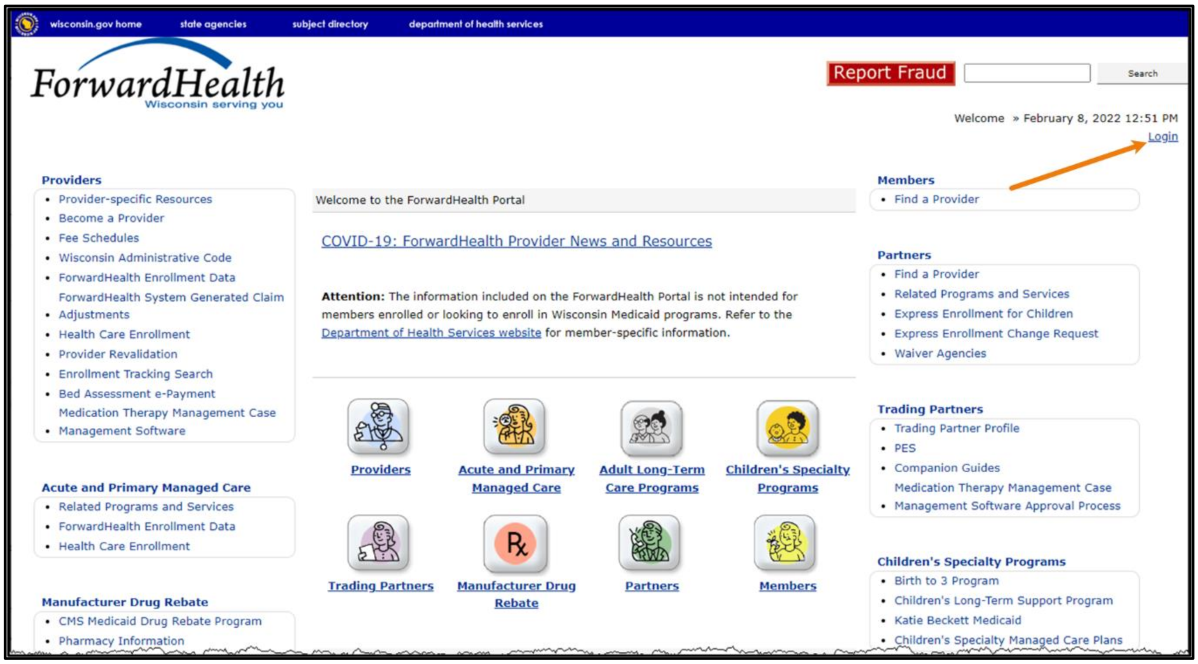

Figure 1 ForwardHealth Portal Homepage

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

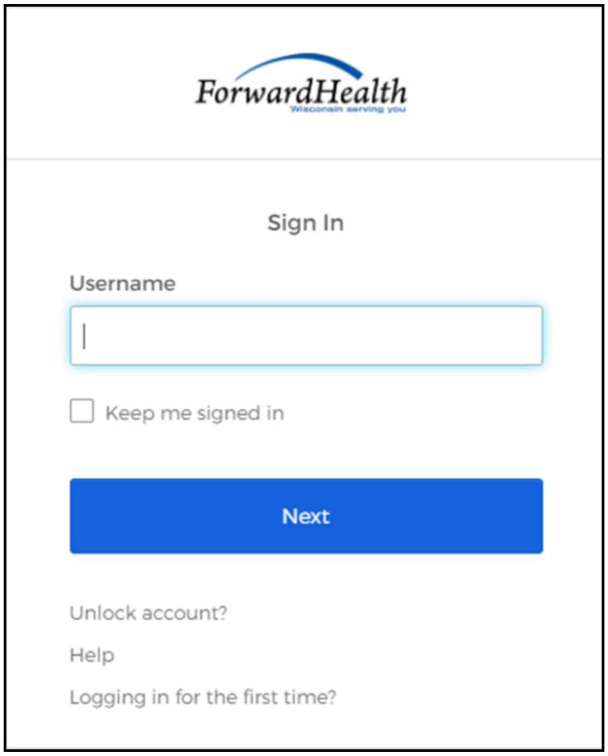

Figure 2 Sign In Box

3. Enter the user's username.

4. Click **Next**. A Verify with your password box will be displayed.

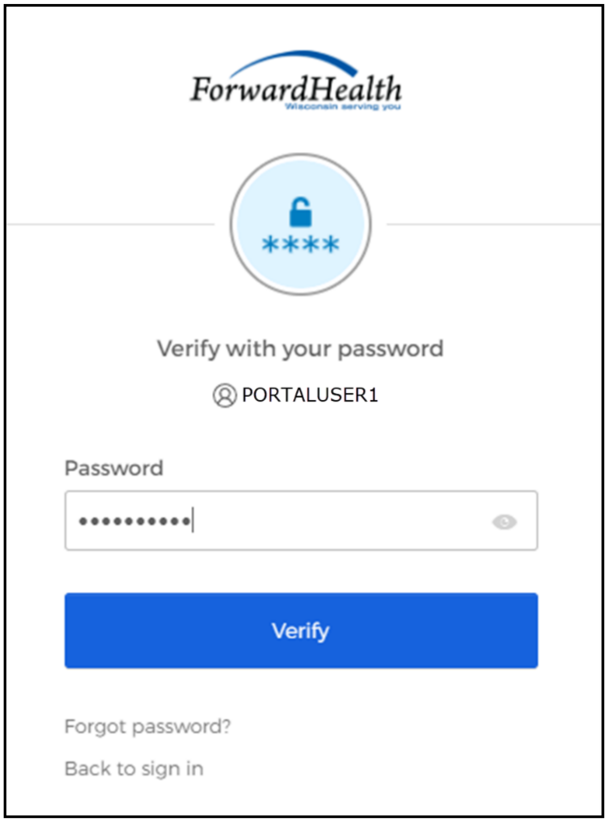

Figure 3 Verify With Your Password Box

5. Enter the user's password.

   Note: If the user has access to the Portal through more than one agency, ensure that the login information is for the correct waiver agency.

6. Click **Verify.** The secure Waiver Agency page will be displayed.

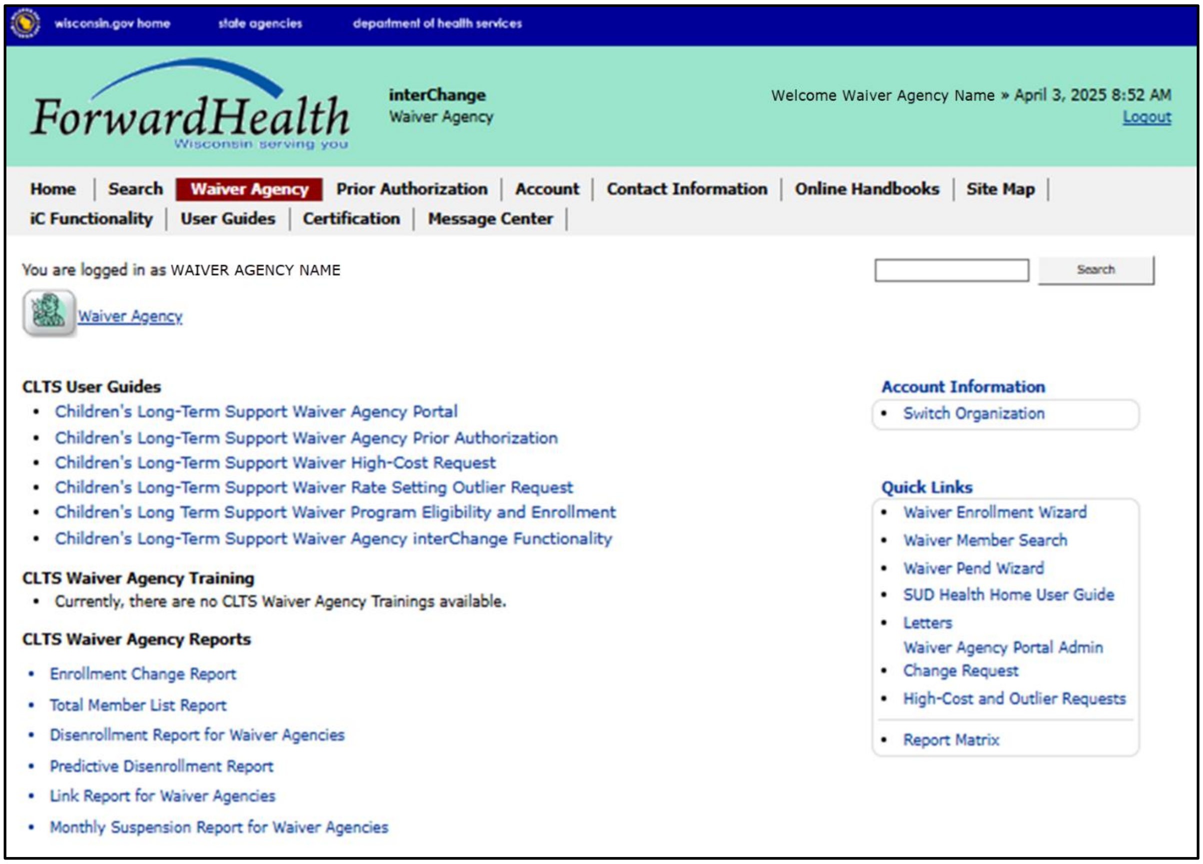

Figure 4 Secure Waiver Agency Page

Information displayed above the waiver agency icon identifies the agency the user is logged in with. Also, the color of the banner should match what is displayed in the screenshot above and InterChange Waiver Agency will be displayed after the ForwardHealth logo to indicate the user is logged in to the Waiver Agency area of the Portal. If Partner is displayed after the ForwardHealth logo, the user is incorrectly logged into the Partner area of the Portal, which will not display links to the reports, notices, or user guide.

2.1 User Guides

A user can view their user guides by clicking the links under the CLTS User Guides heading on the secure Waiver Agency page. User guides include:

- Children's Long-Term Support Waiver Rate Setting Outlier Request User Guide
- Children's Long-Term Support Waiver Program Eligibility and Enrollment User Guide
- Children's Long-Term Support Waiver Agency interChange Functionality User Guide

A user can also view all user guides to which the user has access by clicking the User Guides tab at the top of the page.

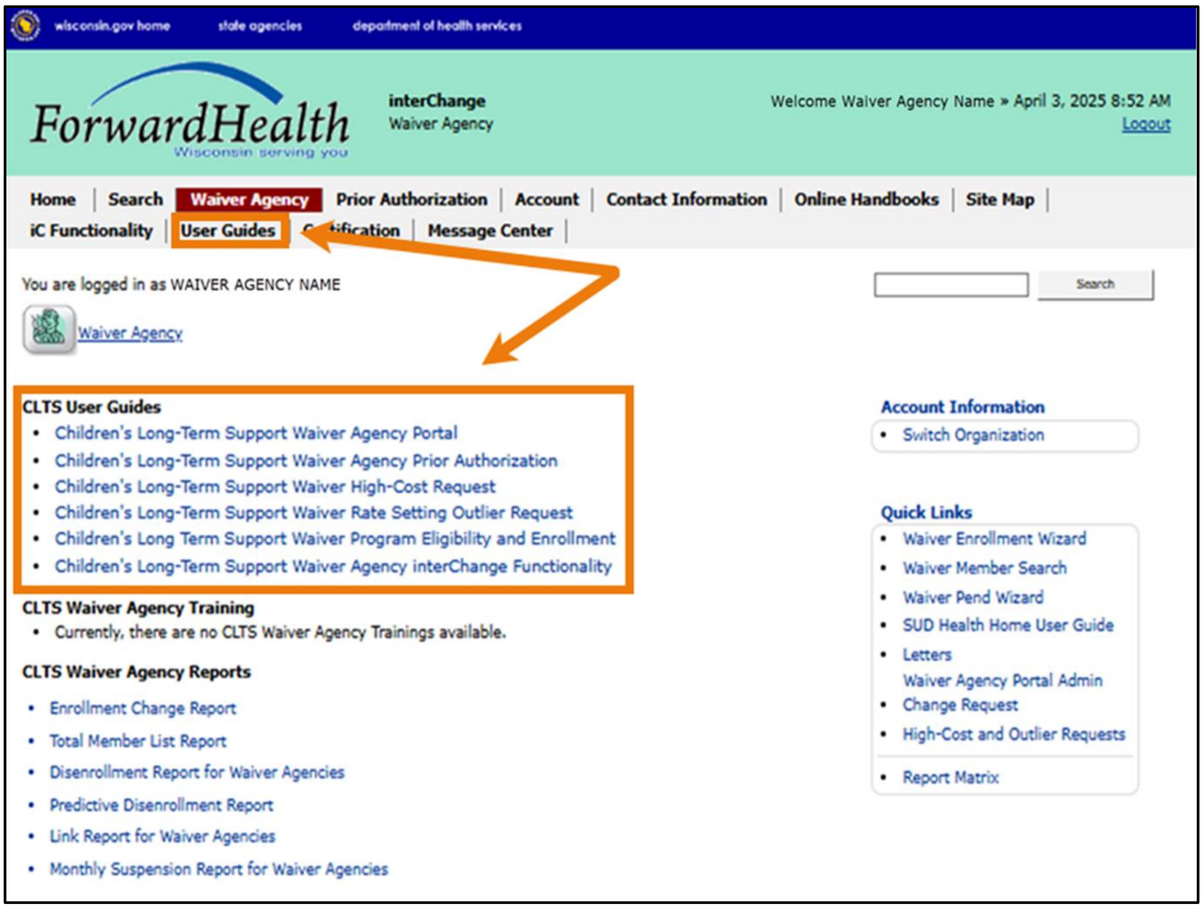

Figure 5 Secure Waiver Agency Page

3 Clerk Maintenance

Waiver agency Portal administrators will need to add clerk accounts and assign a role for each clerk to provide secure Waiver Agency Portal access to their staff. Each county waiver agency (CWA) clerk must be added with a security role that designates what information the clerk will be able to access via the Portal. On the Account page, click **Clerk Maintenance**. The Clerk Maintenance Search panel will be displayed.

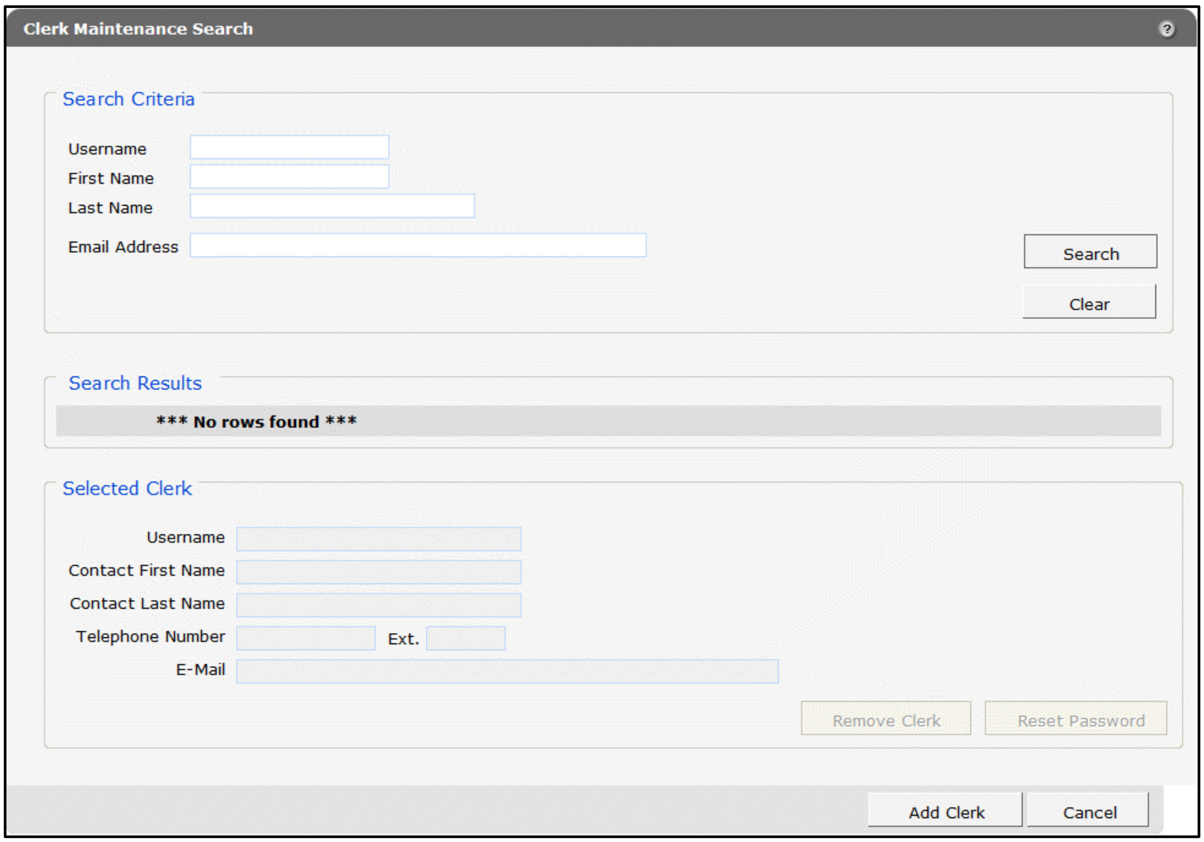

Figure 6 Clerk Maintenance Search Panel

Through the Clerk Maintenance panels, users with administrative and clerk administrative accounts can search for, add, or remove clerks; assign clerk roles; and reset a clerk's password. Refer to Appendix A: User Security Roles for more information about the required user security roles.

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

3.1 Add a Clerk

The Add Clerk function allows the user to add new clerks to a provider organization and to assign specific roles.

Note: Clerks must have a unique clerk ID for the Waiver Agency Portal; they cannot reuse a clerk ID that was previously used for other ForwardHealth Portal accounts, such as the Partner Portal.

1. Click **Add Clerk** located at the bottom of the Clerk Maintenance Search panel. The Clerk Account panel will be displayed.

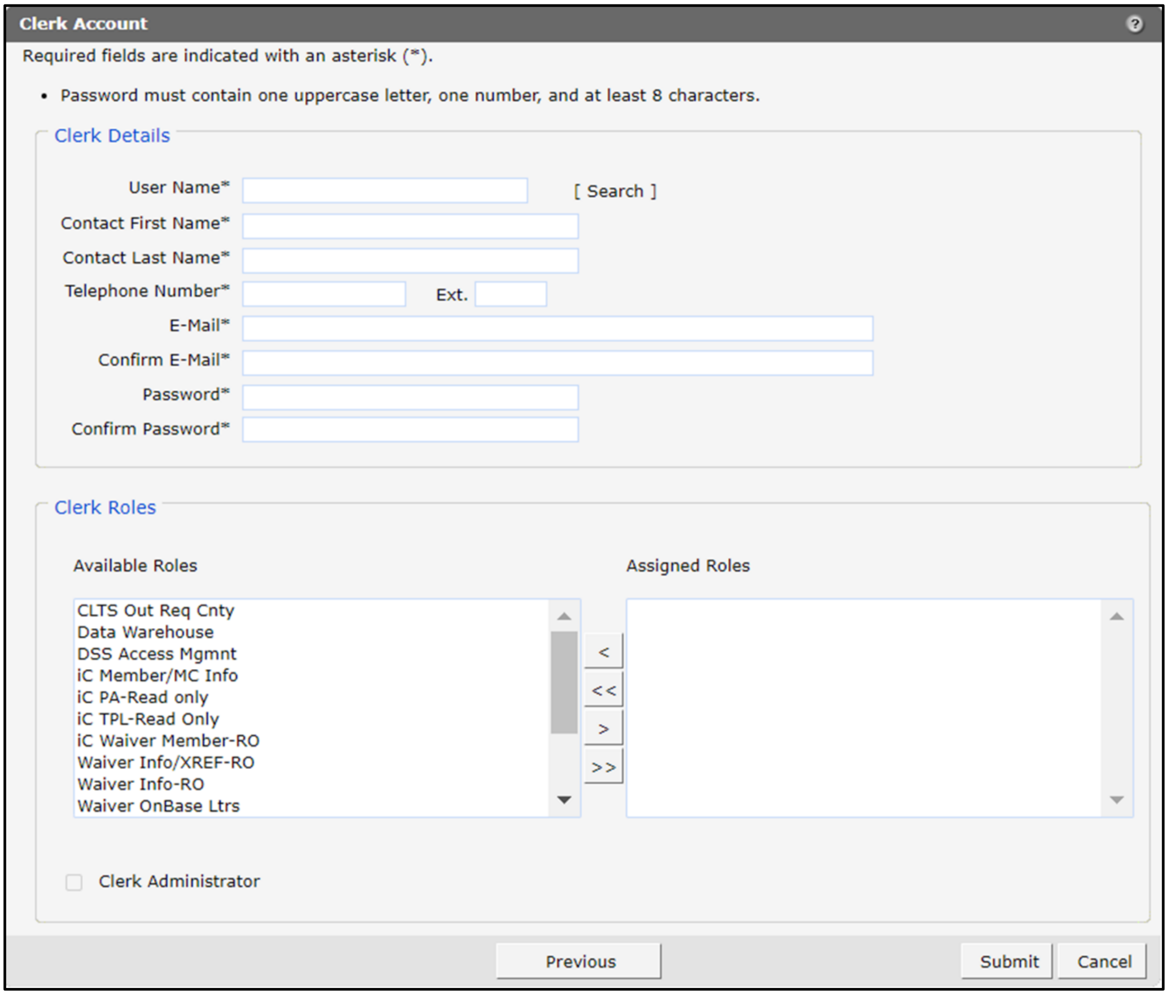

Figure 7 Clerk Account Panel

The user must complete the following steps to add a new clerk account:

- Enter a username. The username must be between six–20 characters and can only contain letters and numbers. The username is not case-sensitive.
- Enter the new clerk's contact first name and contact last name.
- Enter the new clerk's phone number (and extension, if applicable).

- Enter the new clerk's email (twice for confirmation).
- Enter an initial password for the new clerk (twice for confirmation).
    - o The password must be between nine–15 characters and must contain three different types of characters such as uppercase letters, lowercase letters, special characters, or numbers.
    - o The password must be unique and cannot contain information from the user name, contact first name, or contact last name.

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

If adding a clerk account that has already been created but needs to be added to a new organization, the user should complete the following steps:

- Click **Search** to the right of the User Name field. The User Name Search box will be displayed.

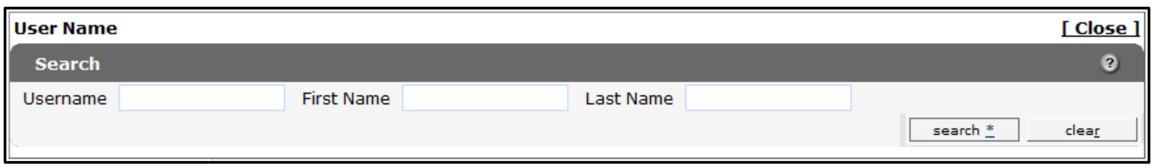

Figure 8 User Name Search Box

- Enter the clerk account's username, first name, or last name.
- Click **Search**. The clerk's information will be displayed in the "Clerk Details" section.

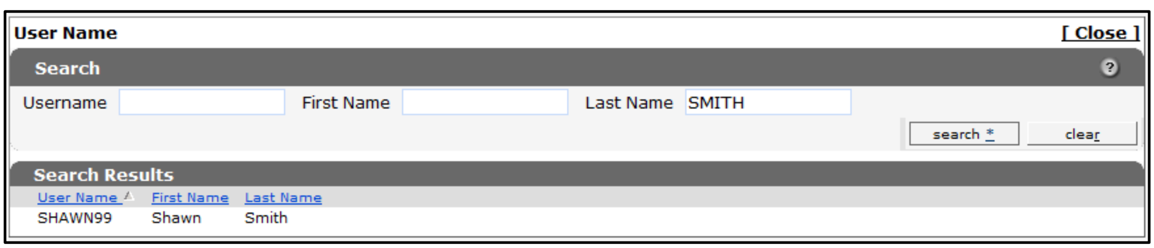

Figure 9 Search Results Section

- Click the row of the applicable clerk account. The User Name Search box will close, and the clerk account information will be auto-populated in the "Clerk Details" section of the Clerk Account panel.

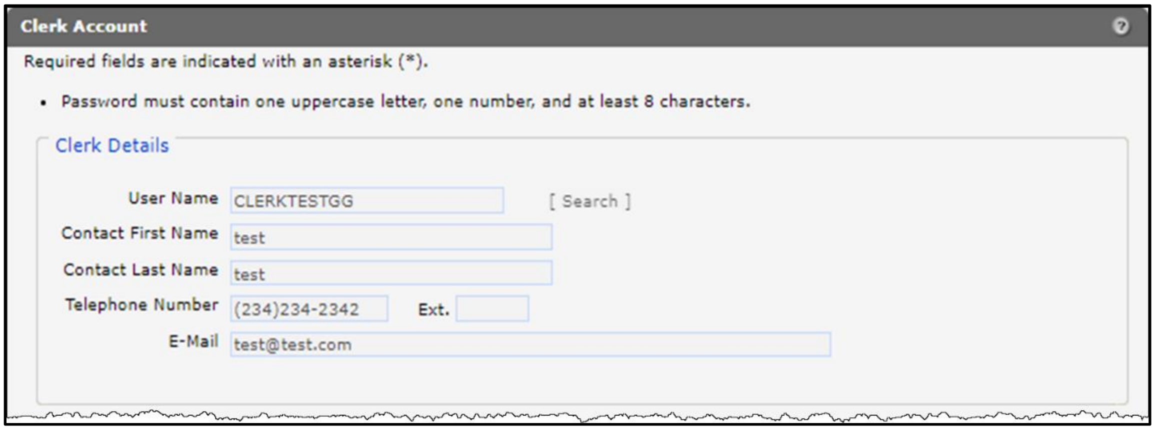

Figure 10 Clerk Account Information Auto-Populated on Clerk Account Panel

2. Proceed to one of the following sections once clerk details have been entered or populated:
   - Step 1 of the Assign a Clerk Administrator section
   - Step 2 of the Add a Role to a Clerk section

3.2 Assign a Clerk Administrator

The Clerk Administrator checkbox allows a user to assign a clerk administrative rights. A clerk with administrative rights can create accounts for clerks and manage the roles assigned to them.

1. Click **Next**. The Clerk Account panel will be displayed.

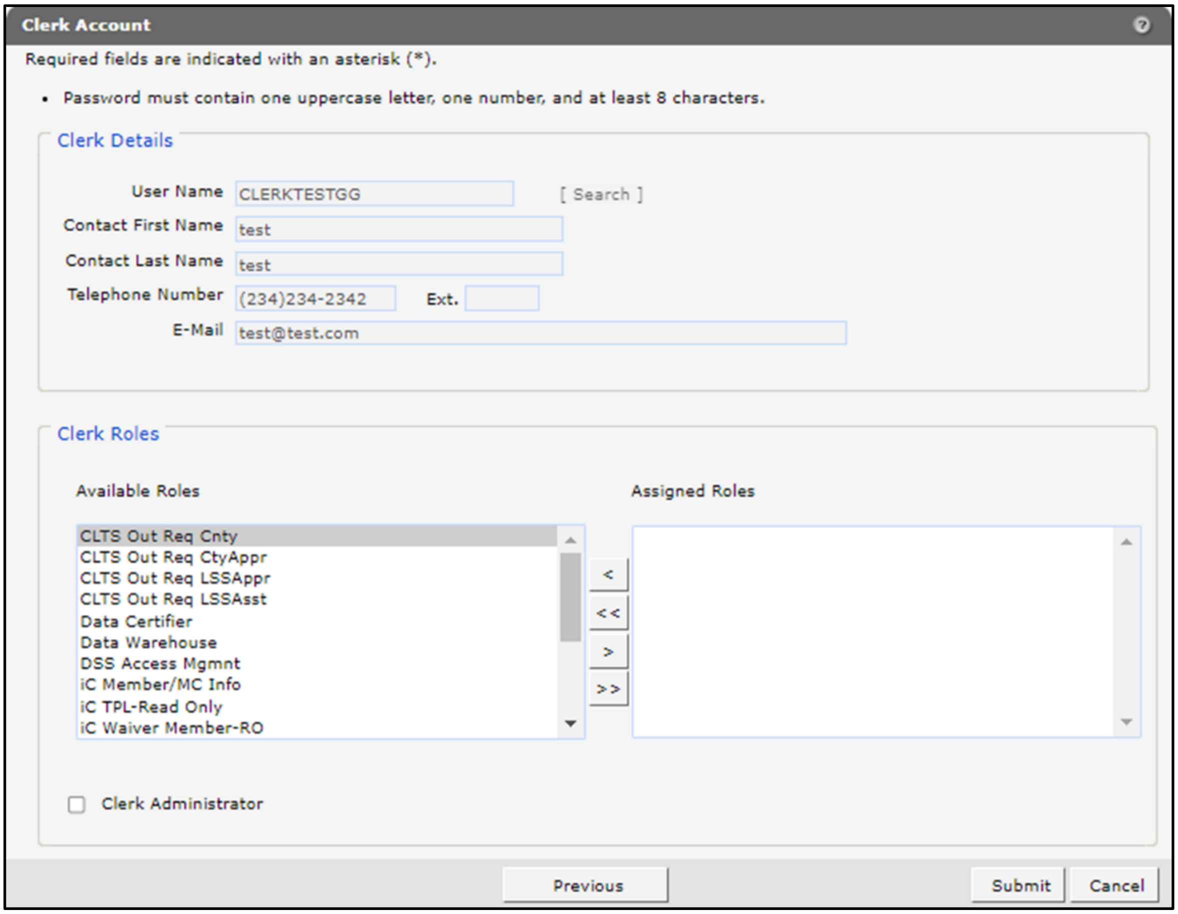

Figure 11 Clerk Account Panel

2. In the "Clerk Roles" section, check the Clerk Administrator box.

Figure 12 Clerk Roles Section With Clerk Administrator Checked

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

Figure 13 Confirmation Message

3.3 Search for a Clerk

The Clerk Maintenance Search panel allows a user to select an existing clerk within the provider organization.

1. Enter information for the clerk in any combination in the "Search Criteria" section. Alternatively, leave the fields blank to bring up a list of all clerks associated with the provider organization.

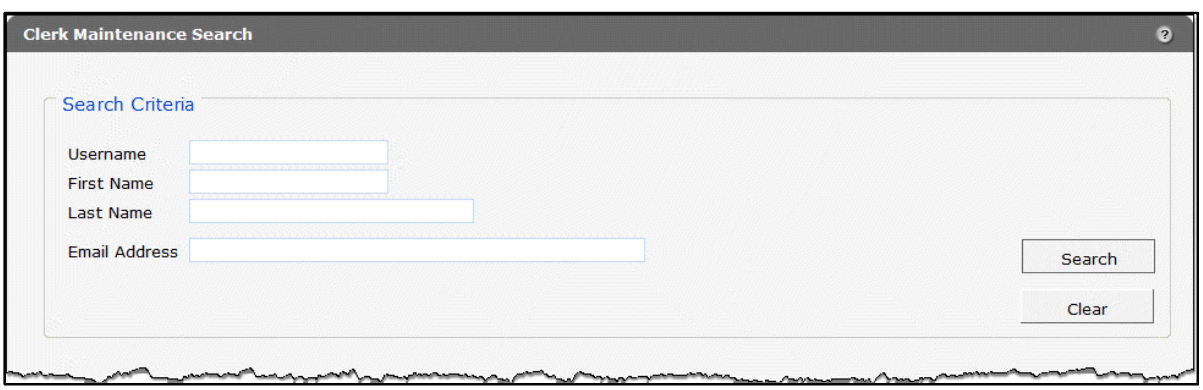

Figure 14 Search Criteria Section

2. Click **Search**.

3. Click the row containing the clerk's name in the "Search Results" section.

Figure 15 Search Results Section

The clerk's information will populate in the "Selected Clerk" section.

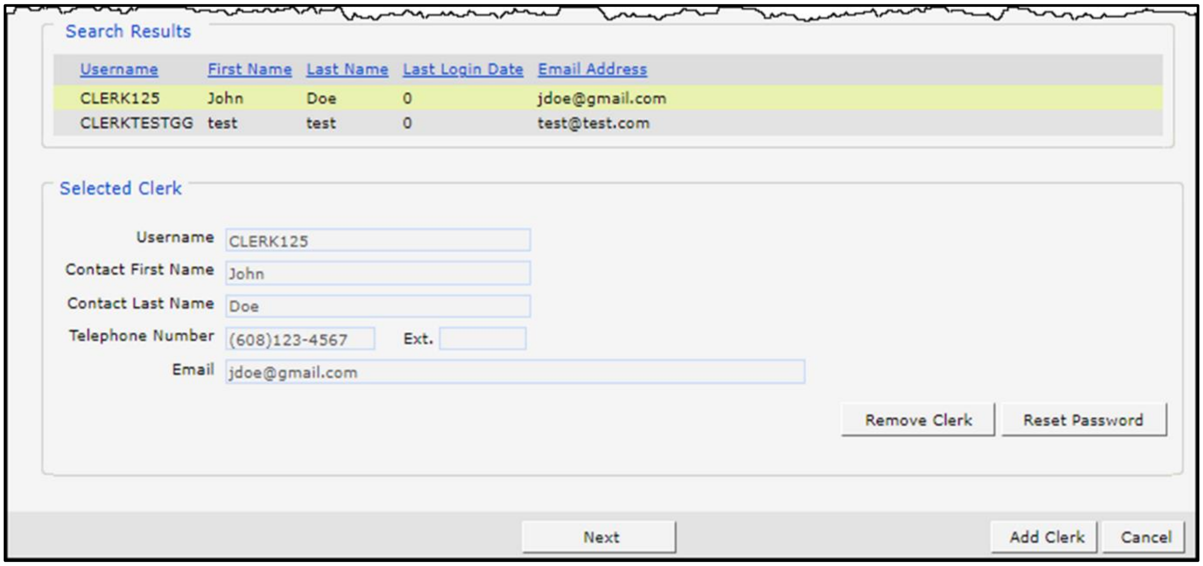

Figure 16 Search Results and Selected Clerk Sections

4. Proceed to one of the following sections once a clerk has been selected:
   - Add a Role to a Clerk section
   - Remove a Role from a Clerk section
   - Reset a Clerk's Password section
   - Delete a Clerk Account section

3.4 Add a Role to a Clerk

The Clerk Roles function allows a user to add roles to new or existing clerks. Refer to Appendix A: User Security Roles for more information about the required user security roles.

5. Click **Next**. The Clerk Account panel will be displayed.

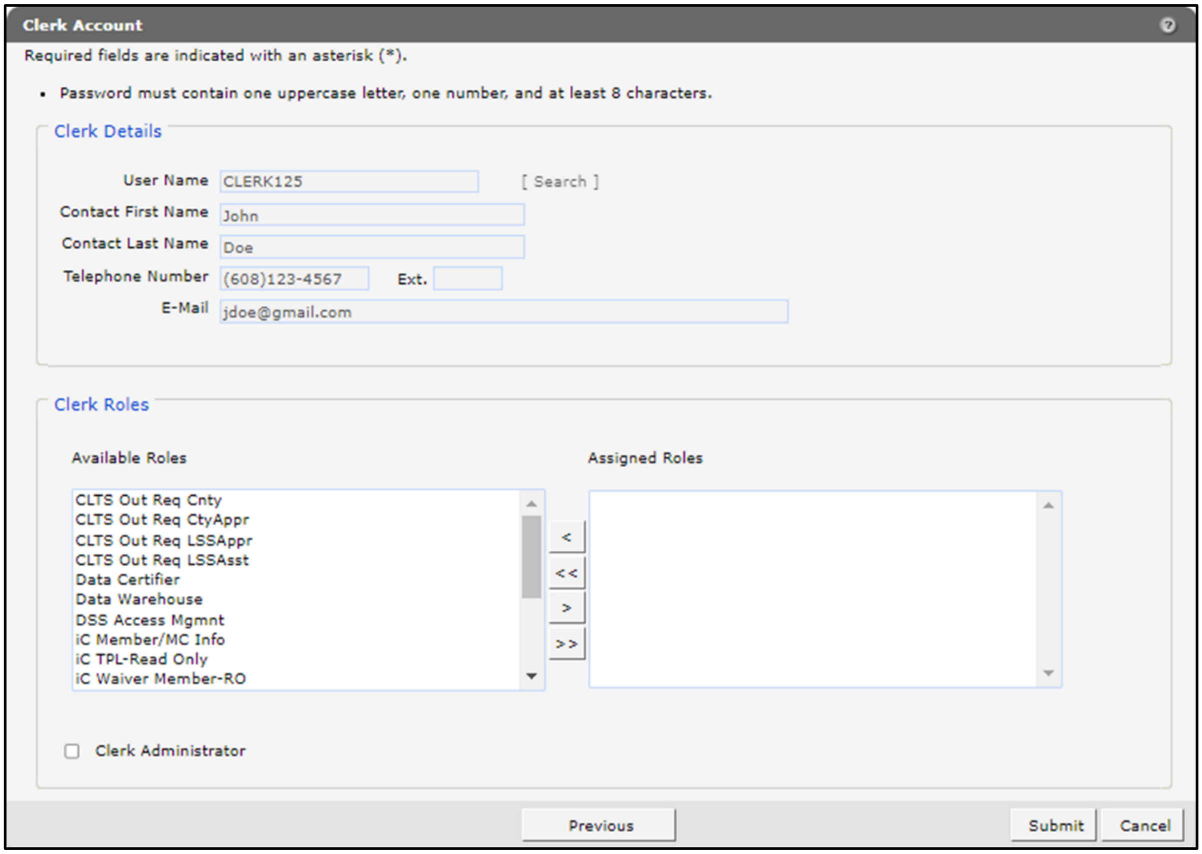

Figure 17 Clerk Account Panel

2. In the "Clerk Roles" section, select a role from the Available Roles box. To select more than one row, hold down the Ctrl key and click all applicable roles.

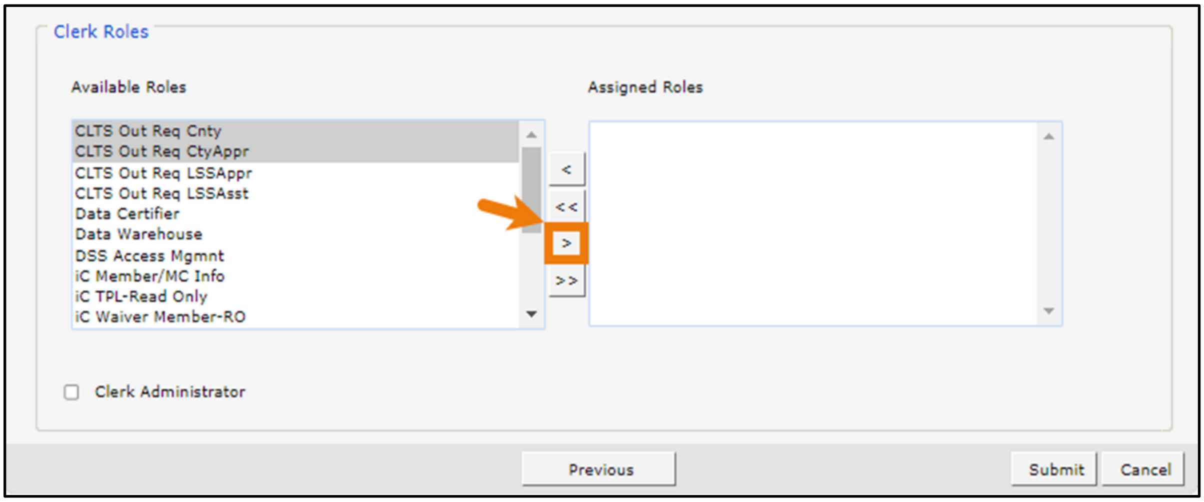

Figure 18 Clerk Roles Section With Available Roles

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

   Note: To add all available roles to the clerk, click **>>.**

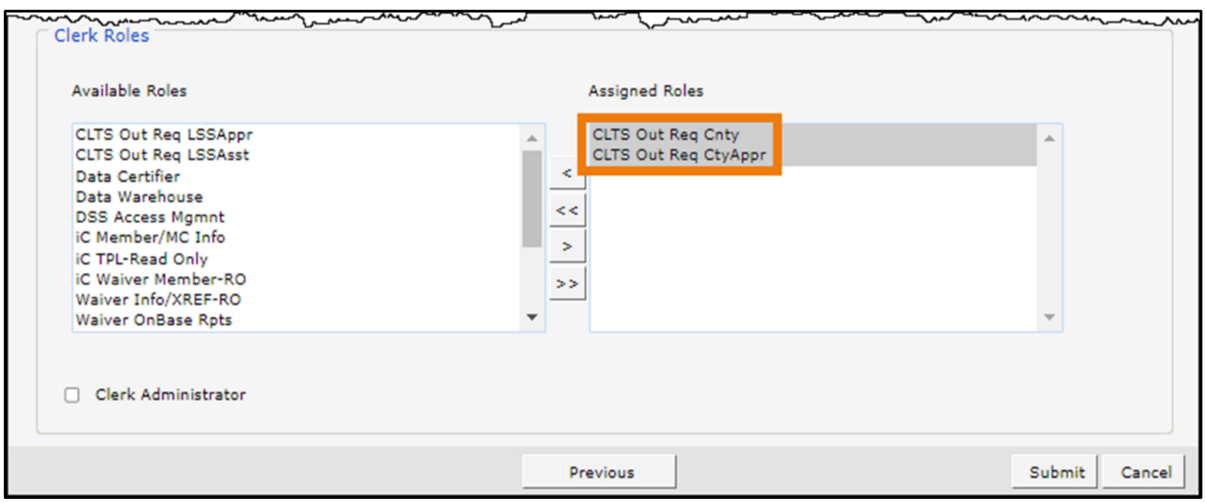

Figure 19 Clerk Roles Section With Assigned Roles

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

Figure 20 User Successfully Updated Message

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

3.5 Remove a Role From a Clerk

1. Click **Next**. The Clerk Account panel will be displayed.

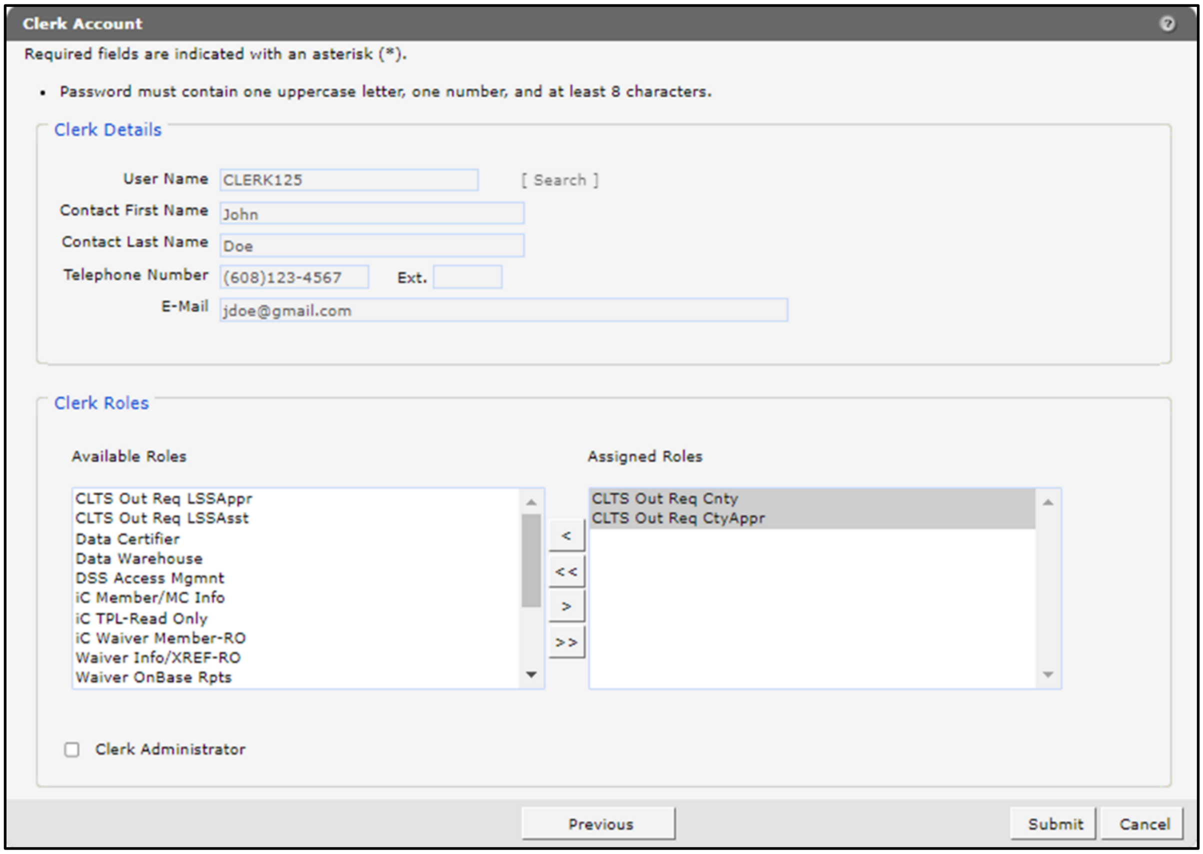

Figure 21 Clerk Account Panel

2. In the "Clerk Roles" section, select a role(s) from the Assigned Roles box. To select more than one row, hold down the Ctrl key and click all applicable roles.

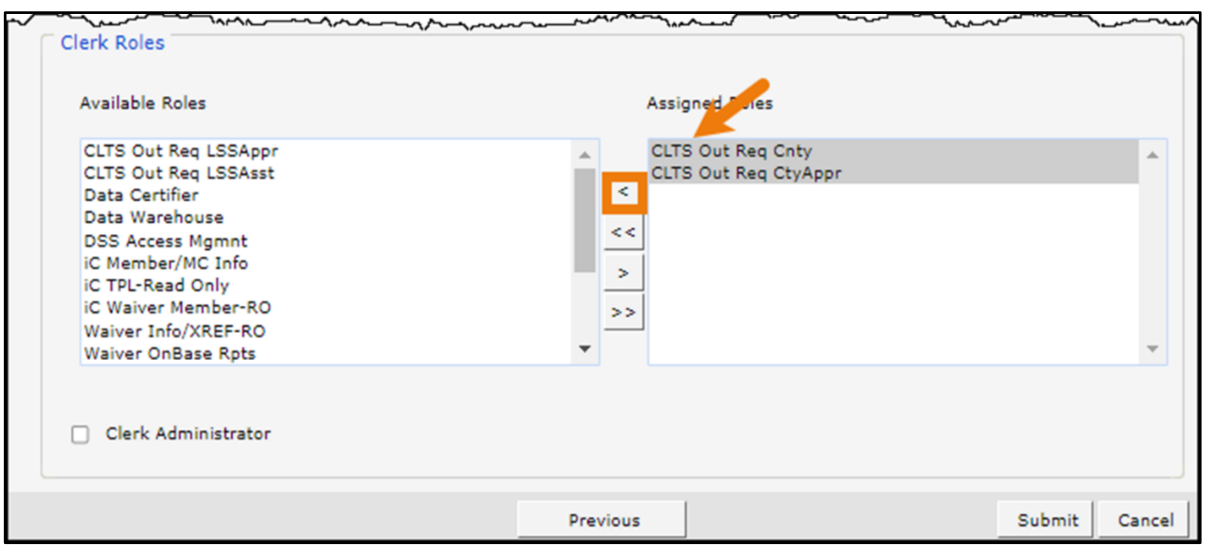

Figure 22 Clerk Roles Section With Assigned Roles

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

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

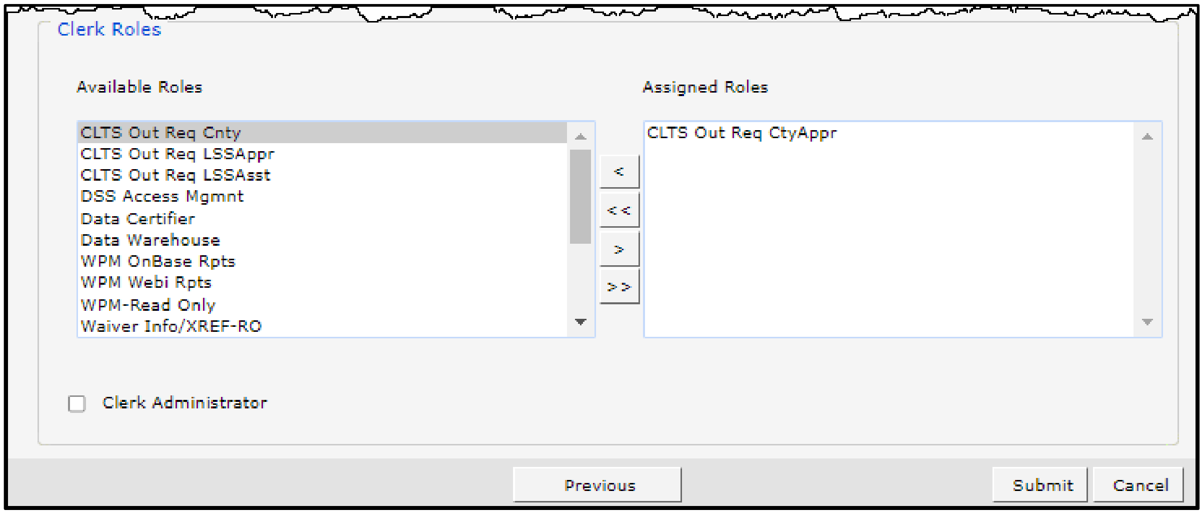

Figure 23 Clerk Roles Section With a Role Removed

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

Figure 24 Confirmation Message

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

3.6 Reset a Clerk's Password

1. On the Clerk Maintenance Search panel, click **Reset Password**.

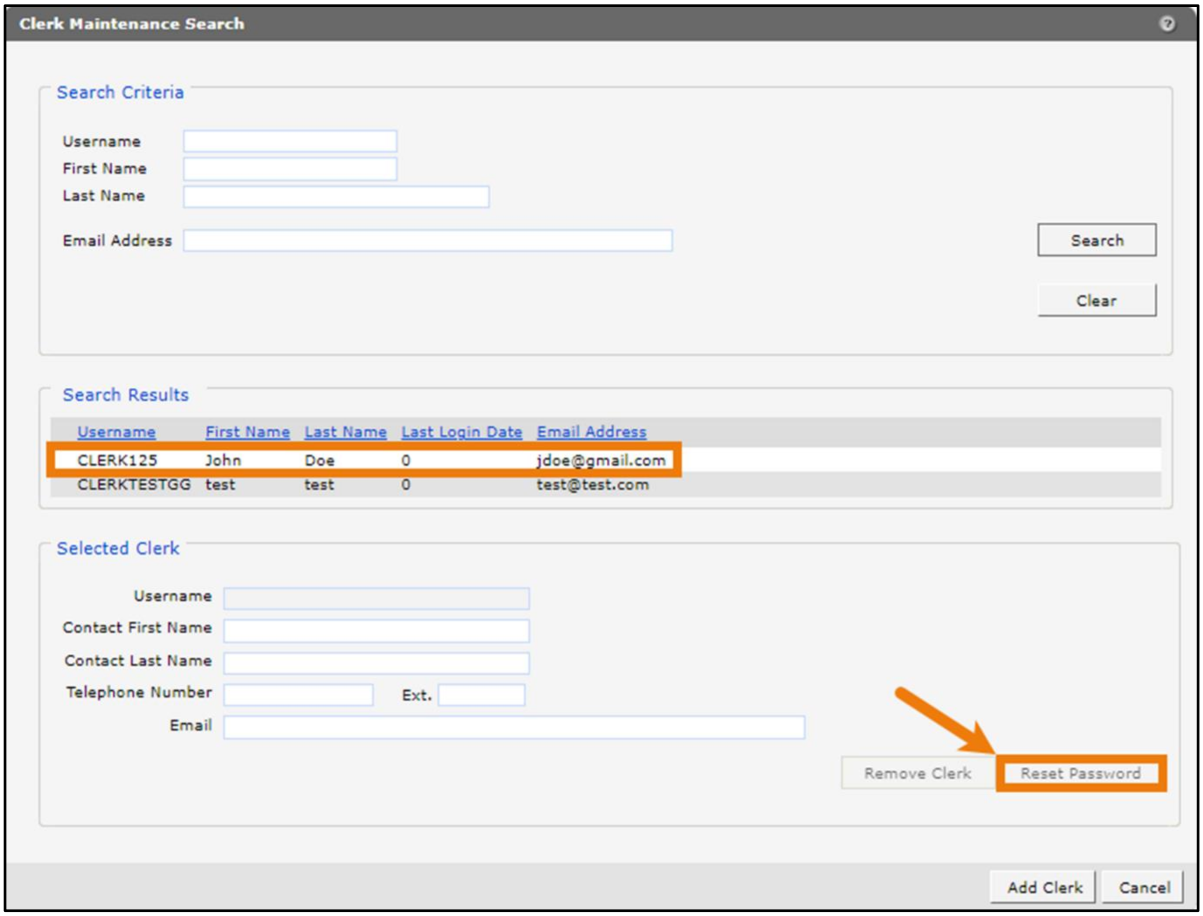

Figure 25 Clerk Maintenance Search Panel

The Reset Password page will be displayed.

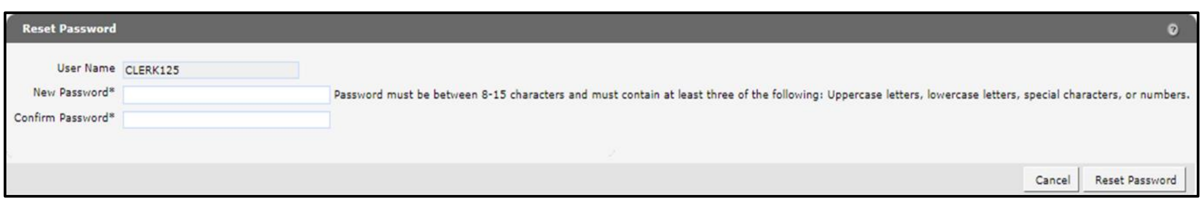

Figure 26 Reset Password Page

2. Enter the new password (twice for confirmation). The password must be between nine–15 characters and must contain three different types of characters such as uppercase letters, lowercase letters, special characters, or numbers. The password must be unique and cannot contain information from the username, contact first name, or contact last name.

3. Click **Reset Password**. A confirmation message will be displayed at the top of the page.

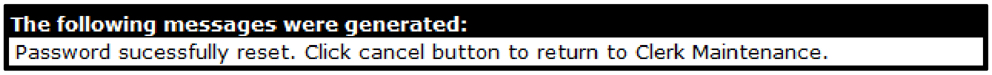

Figure 27 Confirmation Message

Note: The administrator will have to manually share the new password with the clerk. Clerks must change the new password set up by the administrator the first time they log in.

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

3.7 Delete a Clerk Account

1. On the Clerk Maintenance Search panel, click **Remove Clerk** to initiate the record deletion.

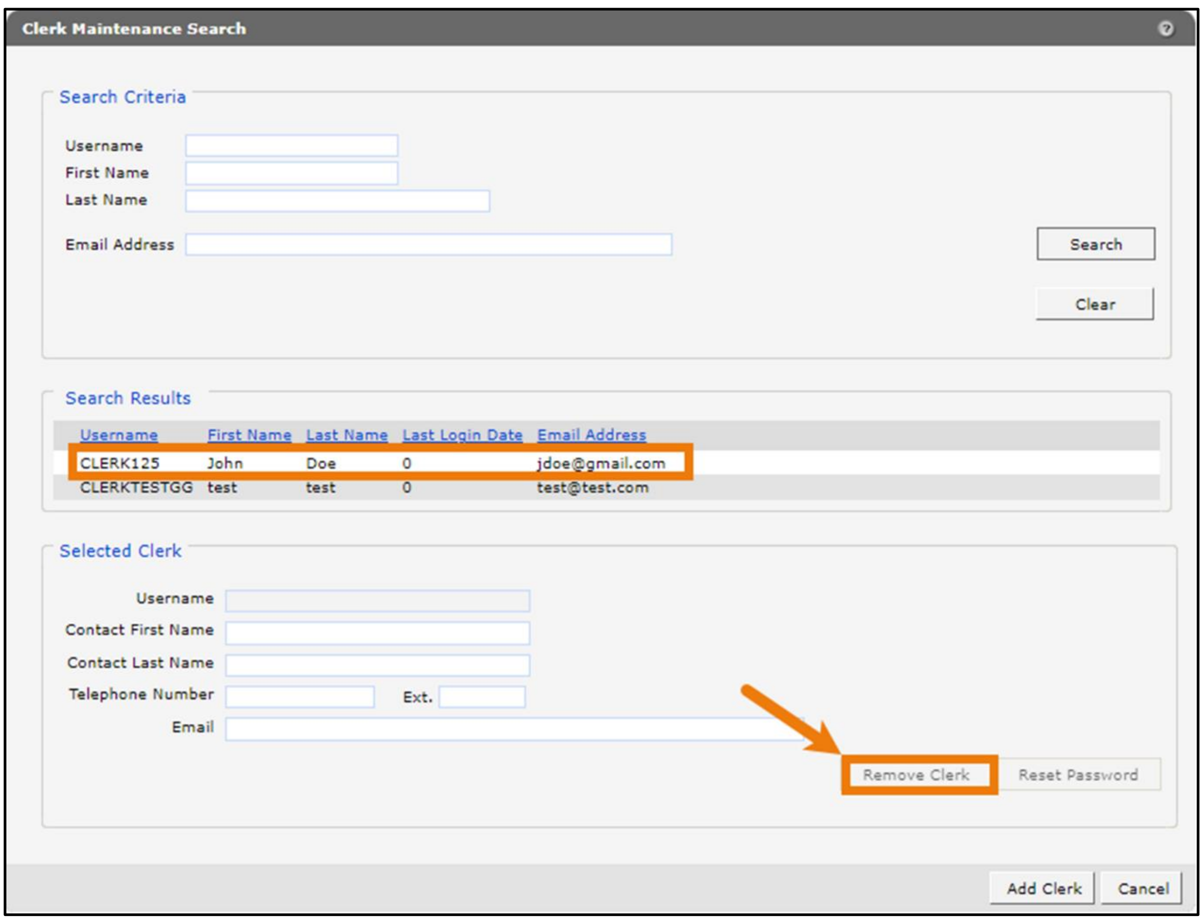

Figure 28 Clerk Maintenance Search Panel

A dialog box confirming the deletion will be displayed.

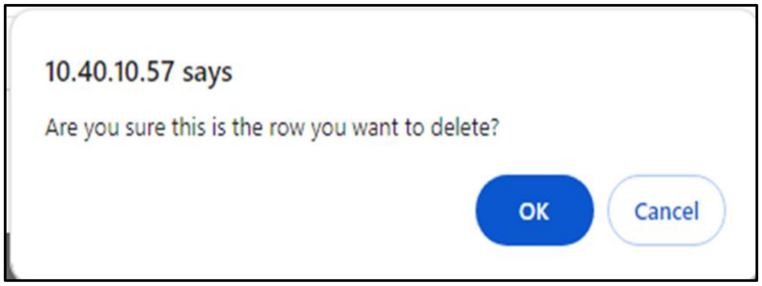

Figure 29 Dialog Box

2. Click **OK**. A confirmation message will be displayed at the top of the Clerk Maintenance Search page.

Figure 30 Confirmation Message

3.8 Clerk Account Log in for First Time

Clerk account users will be required to complete the steps for multi-factor authentication (MFA) when logging in for the first time and every 60 days thereafter.

With MFA, users are asked to provide two authentication methods to verify their identity when logging in to the Portal. MFA will protect Portal accounts against unauthorized access in case user login credentials are compromised.

MFA will be required to log in when a user changes any of the following account information:

- Account password
- Email address

When using MFA, a user will be sent a one-time code through their choice of email, text message (SMS), or phone call.

1. Access the Portal at www.forwardhealth.wi.gov/.

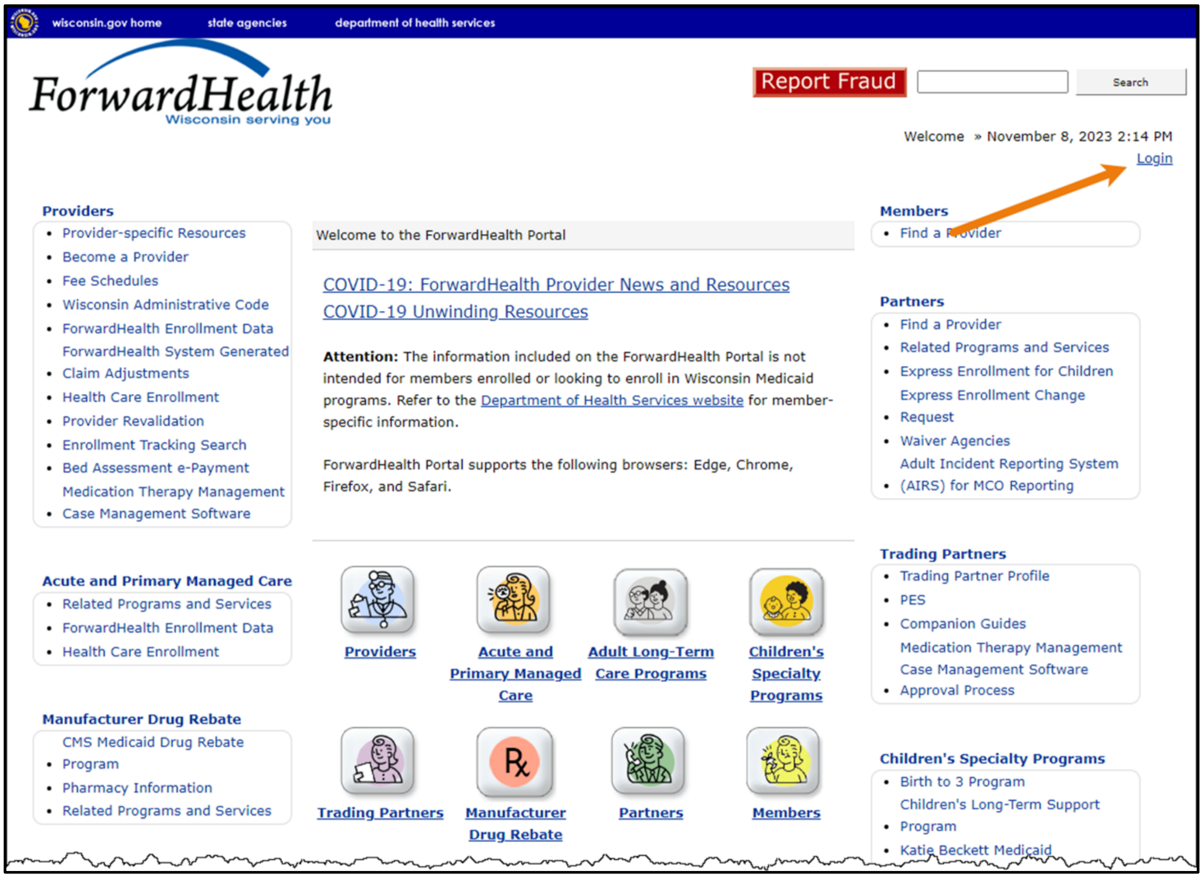

Figure 31 ForwardHealth Portal Page

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

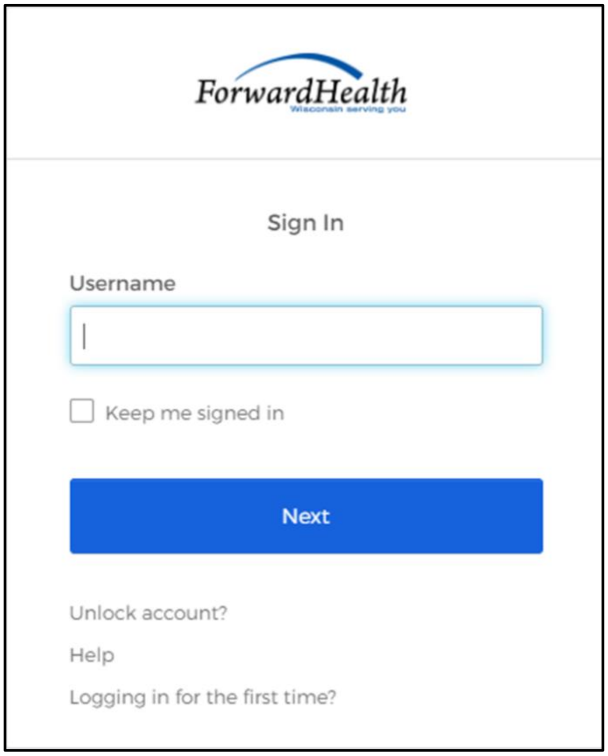

Figure 32 Sign-In Box

3. Enter the user's username.

4. Click **Next**.

A Verify with your password box will be displayed.

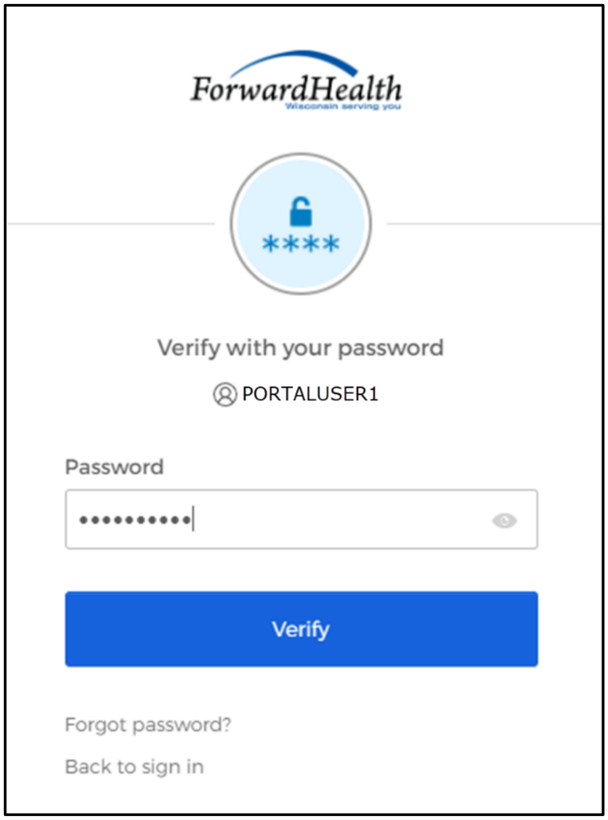

Figure 33 Verify With Your Password Box

5. Enter the user's password.
6. Click **Verify**.

A Get a verification email box will be displayed. Note: If the user's password expires when setting up MFA, a change password box will be displayed, and the user will be prompted to enter and re-enter their new password.

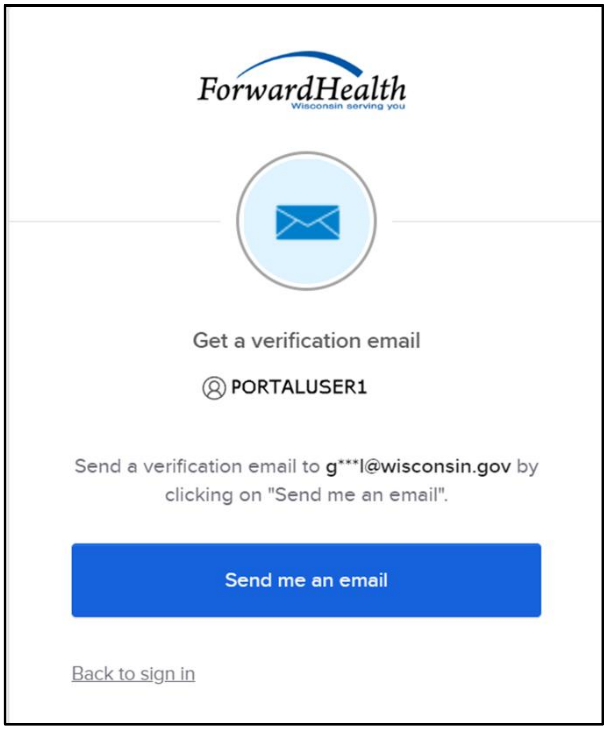

Figure 34 Get a Verification Email Box

7. Click **Send me an email**.

A box will be displayed indicating the email has been sent with a link to enter the code from the email.

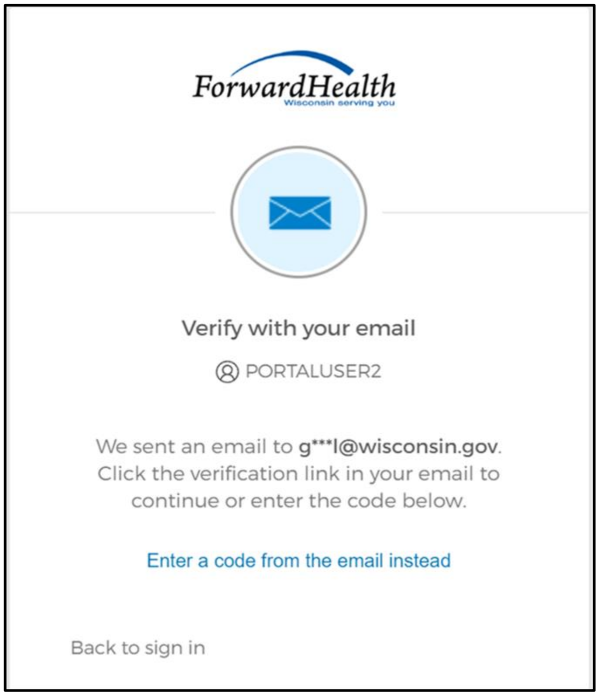

Figure 35 Verify With Your Email Box

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

Figure 36 One-Time Verification Code Email

9. The user can choose to either:
    - Click the **Sign In** link (Option 1) from the email.
    - Copy the verification code in the email (Option 2), return to the Verify with your email box, and click **Enter a verification code instead.** Enter the code from the email and click **Verify.**

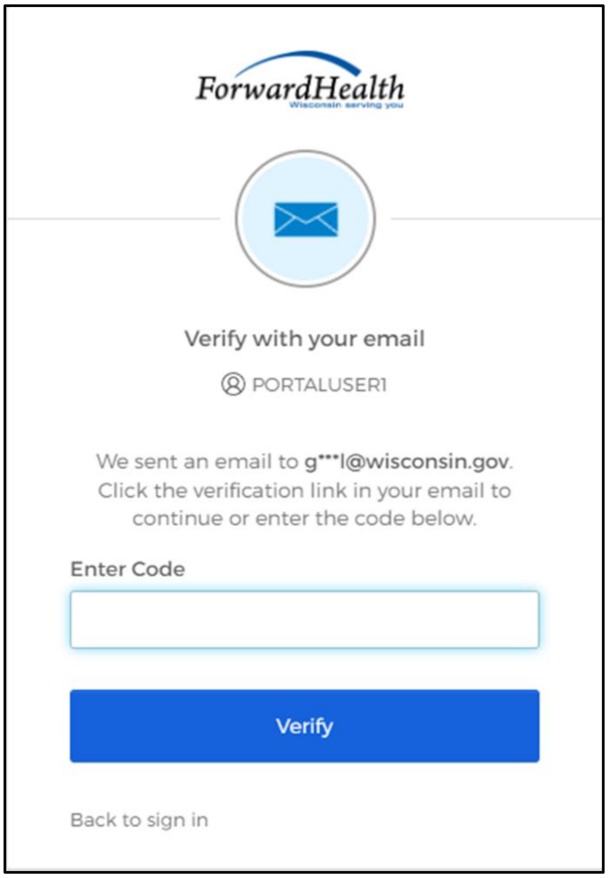

Figure 37 Verify With Your Email Box

A Set up security methods box will be displayed.

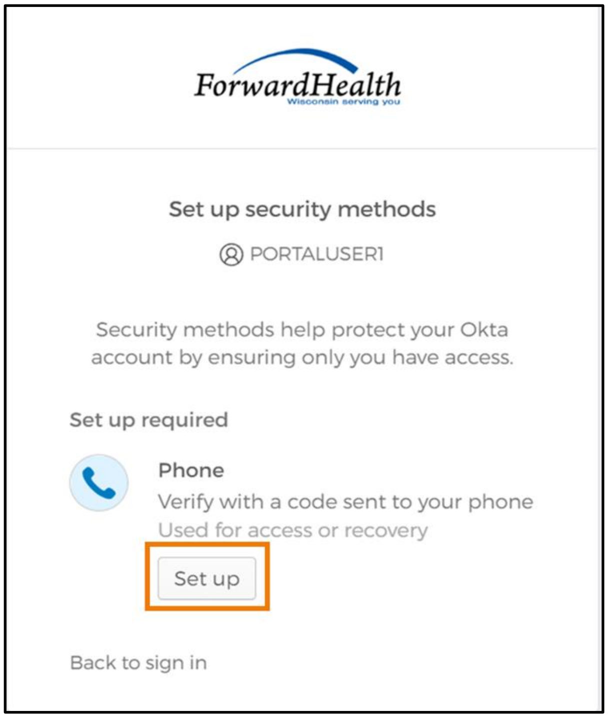

Figure 38 Set Up Security Methods Box

10. Click **Set up**.

A Set up phone authentication box will be displayed.

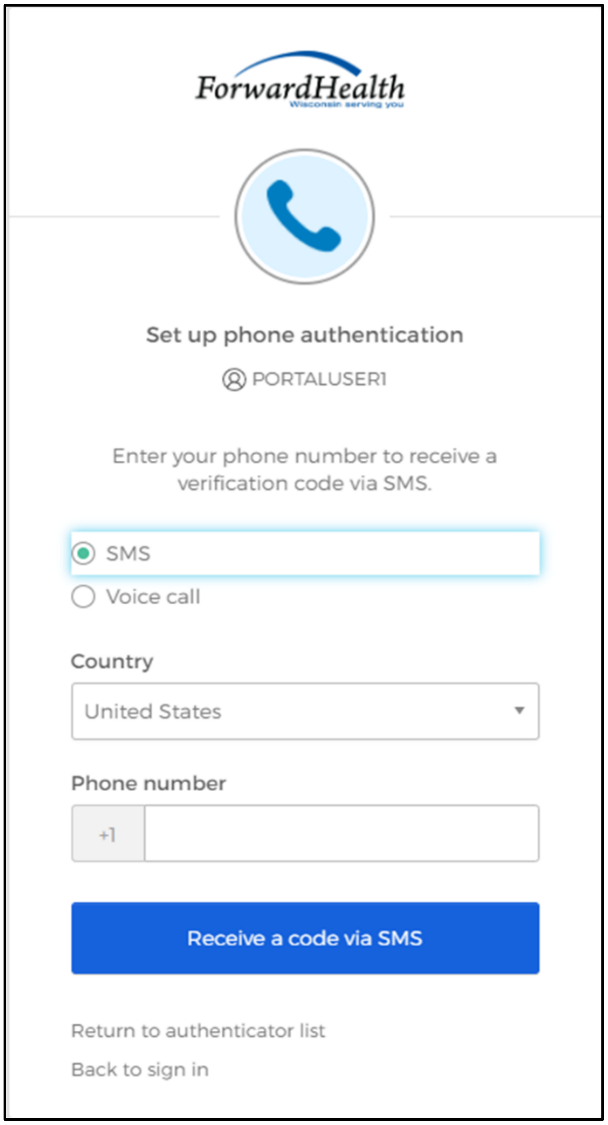

Figure 39 Set Up Phone Authentication Box

11. Select **SMS** (text) or **Voice call** for the phone authentication method.

12. Enter the phone number.

13. Click **Receive a code via SMS** or **Receive a code via voice call** depending on which option is selected.

A Set up phone authentication box will be displayed.

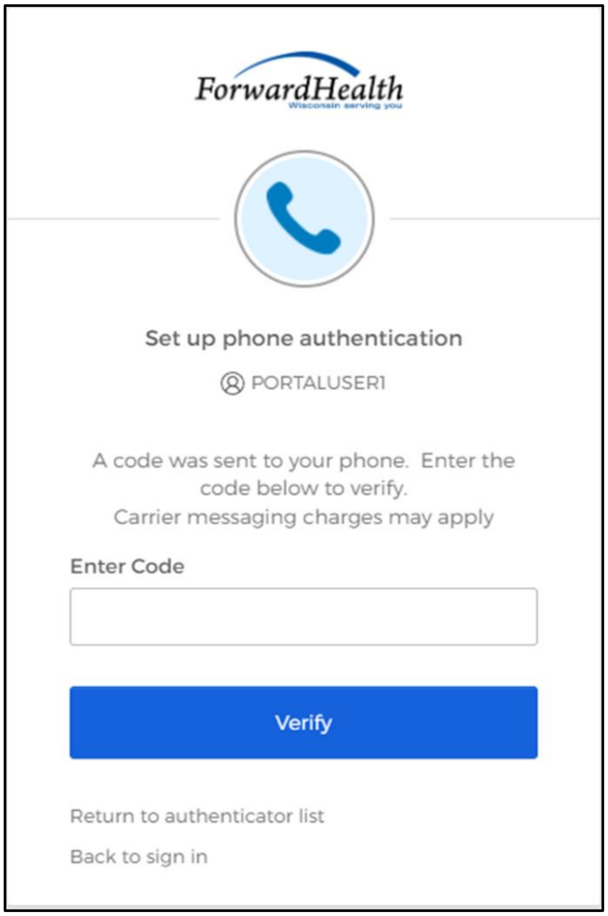

Figure 40 Set Up Phone Authentication Box

14. Enter the code that was sent via text or voice call in the **Enter Code** box.
15. Click **Verify**. MFA will be set up and the user will be signed in to the Portal.

4 Waiver Agency Portal Administrator Change Request

This functionality allows CWA clerks to request a change of their agency's administrator via the Portal. Clerks can make the request for themselves or on behalf of someone else in their agency.

1. On the Secure Waiver Agency page, click **Waiver Agency Portal Admin Change Request**.

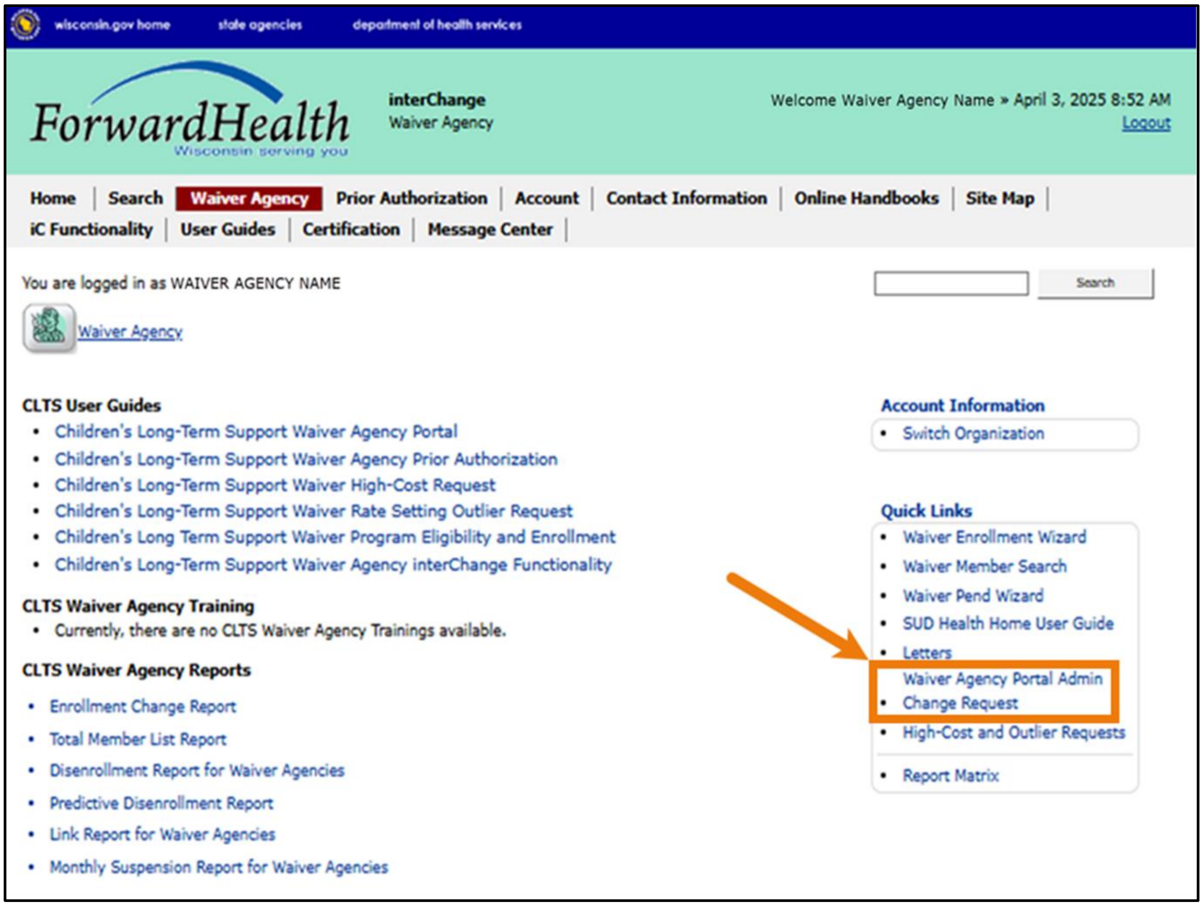

Figure 41 Secure Waiver Agency Page

The Waiver Agency Portal Admin Change Request panel will be displayed.

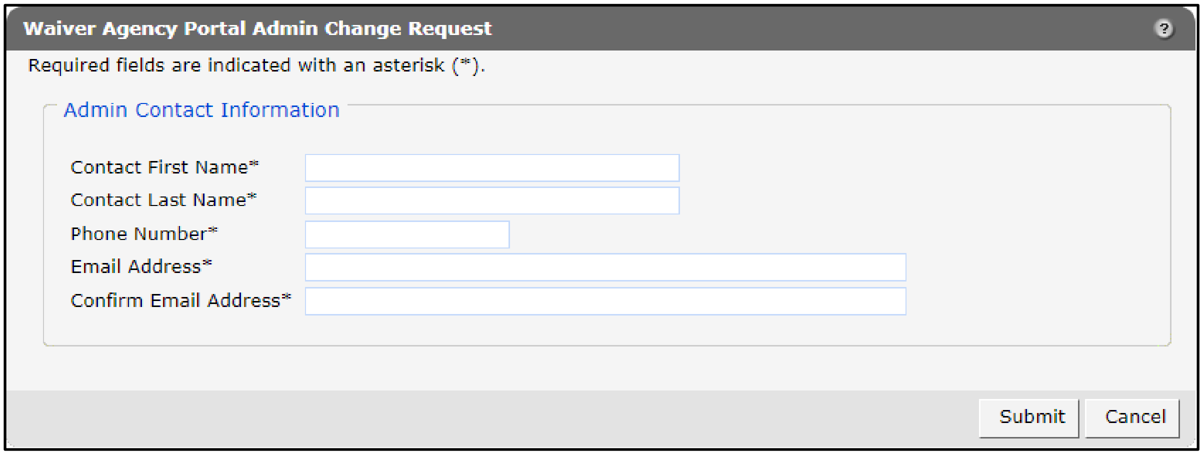

Figure 42 Waiver Agency Portal Admin Change Request Panel

2. Enter administrator contact information in the fields. It is necessary to **complete all the fields** on this page. An error message will be displayed if any of the information is not provided.

3. Click **Submit**. A message will be displayed at the top of the page indicating the request has been submitted to DHS for approval.

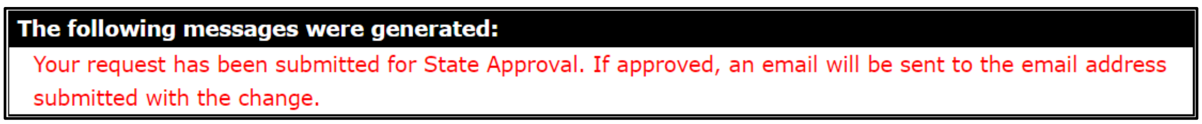

Figure 43 Confirmation Message

4. An autogenerated email will be sent to administrators of the new waiver agency admin role that there is a pending request that needs to be reviewed. Once approved, an email will be sent to the new administrator announcing that the request has been approved. A PIN letter will be sent to the new administrator at the agency address on file with further instructions. Note: The agency can email the BCSTAC inbox at DHSBCSTAC@dhs.wisconsin.gov if they do not have anyone with access to the waiver agency Portal that can submit the request.

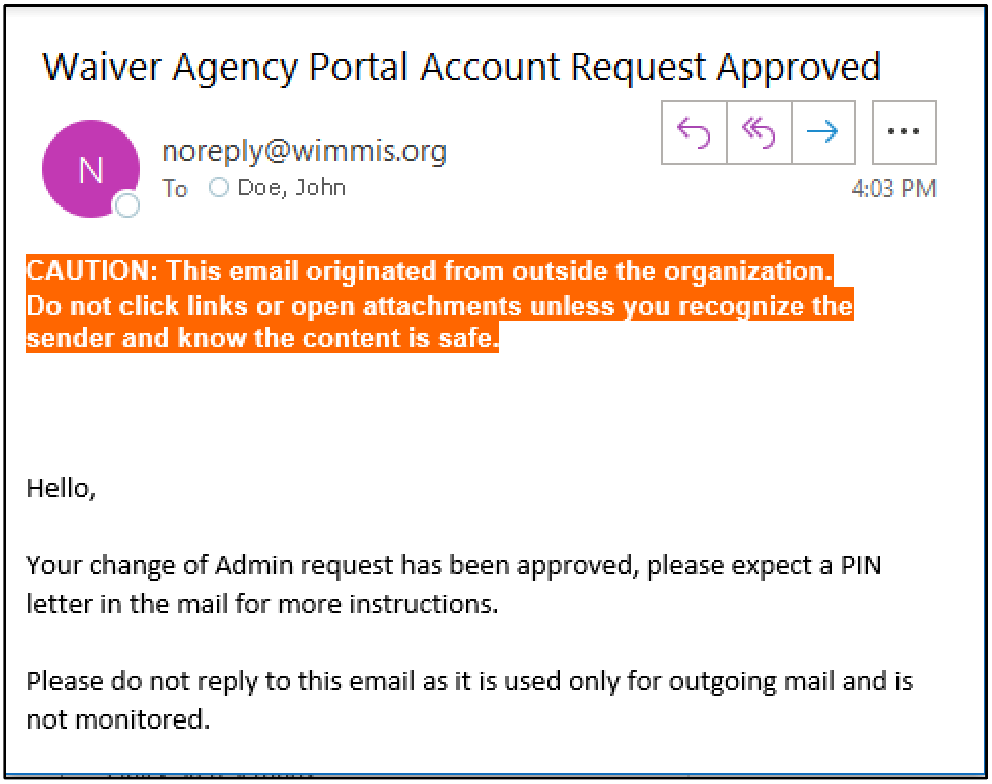

Figure 44 Waiver Agency Portal Account Request Approved Email

5 Administrator Backup Information

Provider administrators are required to set up a backup contact for their Portal accounts via the Administrator Backup panel.

1. On the Account page, click **Administrator Backup Information**. The Administrator Backup panel will be displayed.

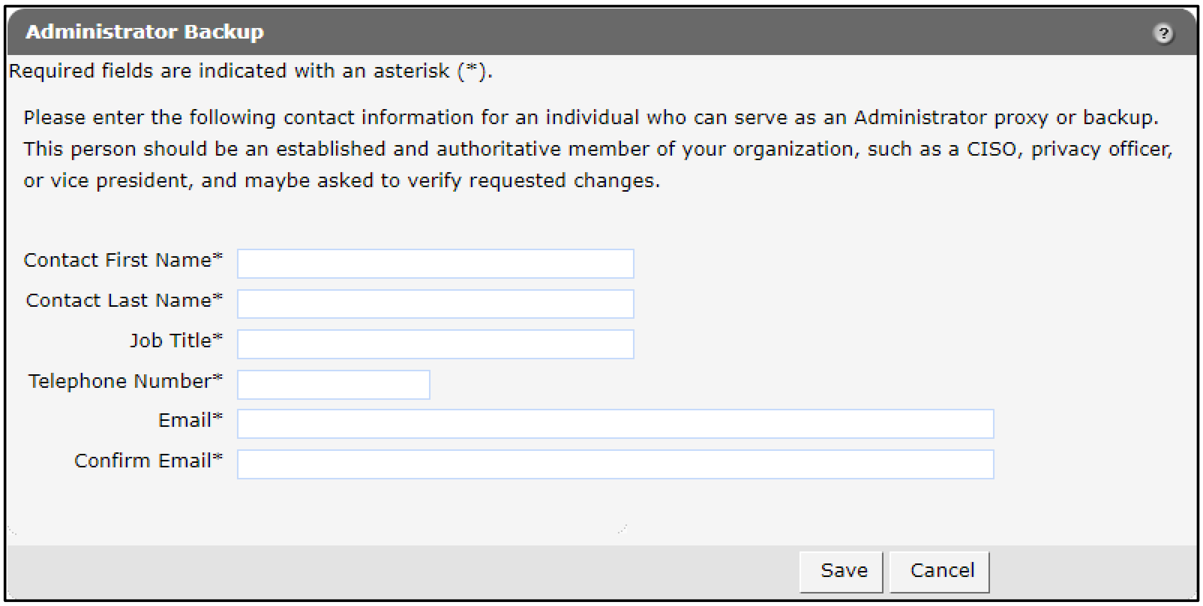

Figure 45 Administrator Backup Panel

2. Enter information for the backup contact in the fields. It is necessary to **complete all the fields** on this page.

   Note: The administrator backup email addresses cannot match those of the current administrator. Also, the phone number must include the area code. The number will be auto-formatted.

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

Figure 46 Confirmation Message

6 Clerk Last Logon

This function allows users with administrative accounts to search, identify, and remove inactive clerk accounts.

1. On the Account page, click **Clerk Last Logon**. The Clerk Last Logon panel will be displayed.

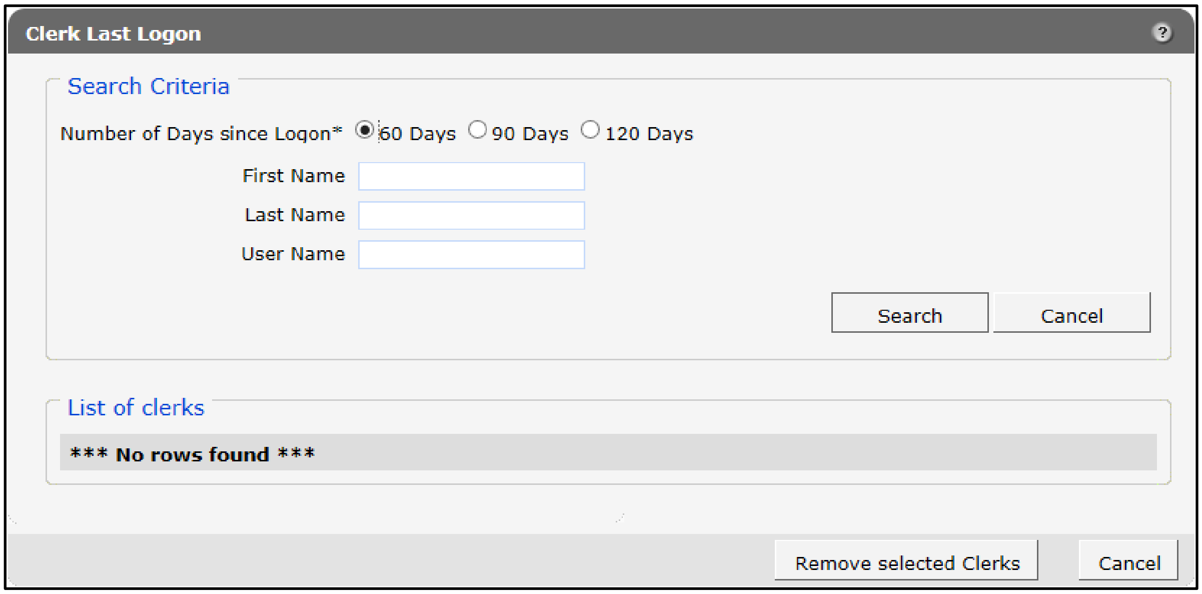

Figure 47 Clerk Maintenance Search Panel

Through the Clerk Last Logon panel, users with administrative accounts can search for users with inactive accounts and can also identify and remove clerks from a list of their organization's clerk accounts.

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

6.1 Search and Remove a Clerk Account

The Clerk Last Logon panel allows a user to select an existing clerk within the provider organization based on the number of days since their last logon.

1. In the Search Criteria section, click the button indicating the number of days since the clerk's last logon. Options include periods of at least 60 days, 90 days, or 120 days from the clerk's last logon.

2. Enter any information for the clerk in any combination in the Search Criteria section. Alternatively, leave the First Name, Last Name, and User Name fields blank to bring up a list of all clerks associated with the provider organization based on the number of days since their last logon.

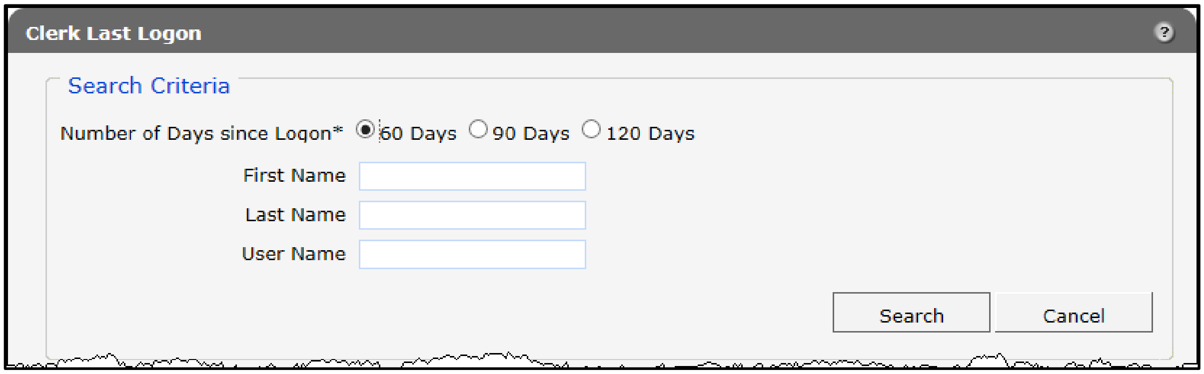

Figure 48 Search Criteria Section

3. Click **Search**. The clerk(s) will be listed under the "List of clerks" section.

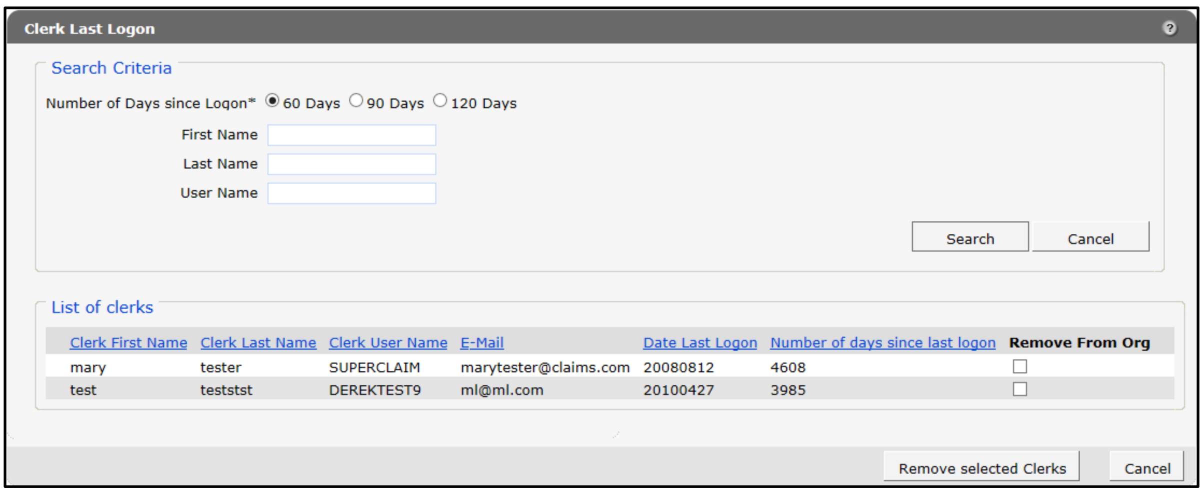

Figure 49 List of Clerks Section

4. Check the box under the Remove From Org column.

5. Click **Remove selected Clerks**. The selected clerks will be removed from the Portal.

   Note: The user can click **Cancel** to return to their secure account page.

7 Appendix A: User Security Roles

Waiver Agency Admin: This role is assigned to a Waiver Program staff member via the Waiver Program and Program Profile setup process.

Upon successful Waiver Program and Program Profile setup, a PIN letter is generated and sent to the assigned Waiver Agency Admin. This security role will only become active when the assigned Waiver Agency Admin successfully completes the Portal registration after receipt of the PIN letter.

Only one Waiver Agency Admin security role will be active for each Waiver Agency at any time.

Clerk Admin: This role is created by the Waiver Agency Admin. The roles assigned to the Clerk Admin will be any allowable combination of the roles held by the Waiver Agency Admin.

The Clerk Admin has access to creating and maintaining all Clerk roles within their waiver agency, having access to assigning only their own roles, in any allowable combination, to a Clerk.

The Clerk Admin has access to the use and functionality of any roles assigned.

CLTS Outlier Request County Submitter: This role is assigned to a user who works for a county and allows the user to create and submit CRSORs. This role is abbreviated as **CLTS Out Req Cnty** on the Portal.

CLTS Outlier Request LSS Asst Submitter: This role is assigned to a user who works for a Waiver Agency sub-contracted organization and allows the user to create and submit CRSORs. This role is abbreviated as **CLTS Out Req LSSAsst** on the Portal.

CLTS Outlier Request County Approver: This role is assigned to a user who works for a county and allows the user to both submit and approve CRSORs. This role is abbreviated as **CLTS Out Req CtyAppr** on the Portal.

CLTS Outlier Request LSS Approver: This role is assigned to a user who works for a Waiver Agency sub-contracted organization and allows the user to both submit and approve CRSORs. This role is abbreviated as **CLTS Out Req LSSAppr** on the Portal.

Note: If a county chooses, a user may act as both a submitter and an approver. The approver roles allow a user to function as both submitter and approver for CRSORs. Only one CRSOR role may be assigned to each clerk user.

PA Clerk CLTS Waiver: This role allows the user to utilize the Prior Authorization tab and all subsequent prior authorization links. This role is abbreviated as **PA Clerk CLTS Waiver** on the Portal.

PA—View Only: This role allows the user access to the Prior Authorization tab and the Search or Amend a PA, View Uploaded PA File Results, and PA Search-Bulk links. This role is abbreviated as **PA—View Only** on the Portal. Note: The Amend PA button will be disabled after the user performs a search.

Waiver Agency Info—Read Only: This role allows the user to view Waiver Agency information particular to the user's current agency but does not allow the user to edit any information. This role is abbreviated as **Waiver Info-RO** on the Portal.

Waiver Agency Info and Cross-Reference—Read Only: This role allows the user to view Waiver Agency particular to the user's current agency and cross-reference information but does not allow the user to edit any information. This role is abbreviated as **Waiver Info/XREF-RO** on the Portal.

interChange Member/Managed Care Info—Read Only: This role allows the user to view exposed interChange Member information panels but does not allow the user to edit any information. This role is abbreviated as **iC Member/MC Info** on the Portal.

interChange Waiver Member—Read Only: This role allows the user to view exposed interChange Waiver Member information panels but does not allow the user to edit any information. This role is abbreviated as **iC Waiver Member-RO** on the Portal.

interChange Third-Party Liability (TPL)—Read Only: This role allows the user to view exposed interChange TPL information panels but does not allow the user to edit any information. This role is abbreviated as **iC TPL-Read Only** on the Portal.

Waiver Enrollment Wizard—Update: This role allows the user to utilize the Waiver Enrollment Wizard, based on the rules defined in the Program Profile. This role is abbreviated as **Waiver Wizard-Update** on the Portal.

Waiver Enrollment Wizard—Read Only: This role allows the user to utilize the Member Search wizard to search interChange for Waiver enrollment records but does not allow the user to edit any information. This role is abbreviated as **Waiver Wizard-RO** on the Portal.

Waiver Enrollment OnBase Reports: This role allows the user to view waiver-specific OnBase reports. This role is abbreviated as **Waiver OnBase Rpts** on the Portal.

Waiver Enrollment OnBase Letters: This role allows the user to view agency-specific enrollment and disenrollment letters. This role is abbreviated as **Waiver OnBase LTRS** on the Portal.

Wisconsin Provider Management (WPM)—Read Only: This role allows the user to view exposed interChange Provider information panels but does not allow the user to edit any information. This role is abbreviated as **WPM-Read Only** on the Portal.

DSS Access Management: This role allows the user to use the DSS Access Management wizard to assign agency users with the Data Warehouse role access to the appropriate (and available) Data Marts.

Data Warehouse: This role allows users to be seen in the DSS Access Management wizard and be granted access to a Data Mart by a user with the DSS Access Management role.

8 Appendix B: Resources

In addition to the Children’s Long-Term Support Waiver Agency Portal User Guide, there are other user guides that are currently available for CLTS users:

- Children’s Long-Term Support Waiver Rate Setting Outlier Request User Guide
- Children’s Long-Term Support Waiver Program Eligibility and Enrollment User Guide
- Children’s Long-Term Support Waiver Agency interChange Functionality User Guide
- Children’s Long-Term Support Waiver Agency Prior Authorization User Guide
- Children’s Long-Term Support High-Cost Request Processing Application User Guide