

# User Guide

## Children's Long-Term Support Rate Setting Outlier Request Processing Application

April 28, 2025



WISCONSIN DEPARTMENT  
of HEALTH SERVICES

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# 1 Introduction

The Children's Long-Term Support Rate Setting Outlier Request (CRSOR) processing application has been created in OnBase to provide an automated processing system for County Waiver Agencies (CWAs) to request Outliers for the Children's Long-Term Support (CLTS) program. The application will allow CWAs to create and submit CRSORs to the Wisconsin Department of Health Services (DHS) for review and approval. CWAs will be able to access the CRSOR processing application via their secure Waiver Agency page on the ForwardHealth Portal.

## 2 Getting Started

Both public and secure information is accessible through 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 users to conduct business through a secure entry point 24 hours a day, seven days a week.

### 2.1 New Waiver Agencies

DHS will collect the agency information and the administrator contact information to create the agency and agency administrator in the system. Once the agency administrator is created, a PIN letter will be mailed to the administrator who can begin setting up their account and using the Portal. This includes creating other users for the waiver agency. Administrators can refer to the [ForwardHealth Provider Portal Account User Guide](#) for detailed instructions about setting up accounts.

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 Waiver Agency ID. For security purposes, the Login ID contains only digits three–six of the Waiver Agency ID.

### 2.2 Help Desk Information

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

# 3 Accessing the Secure Waiver Agency Page

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

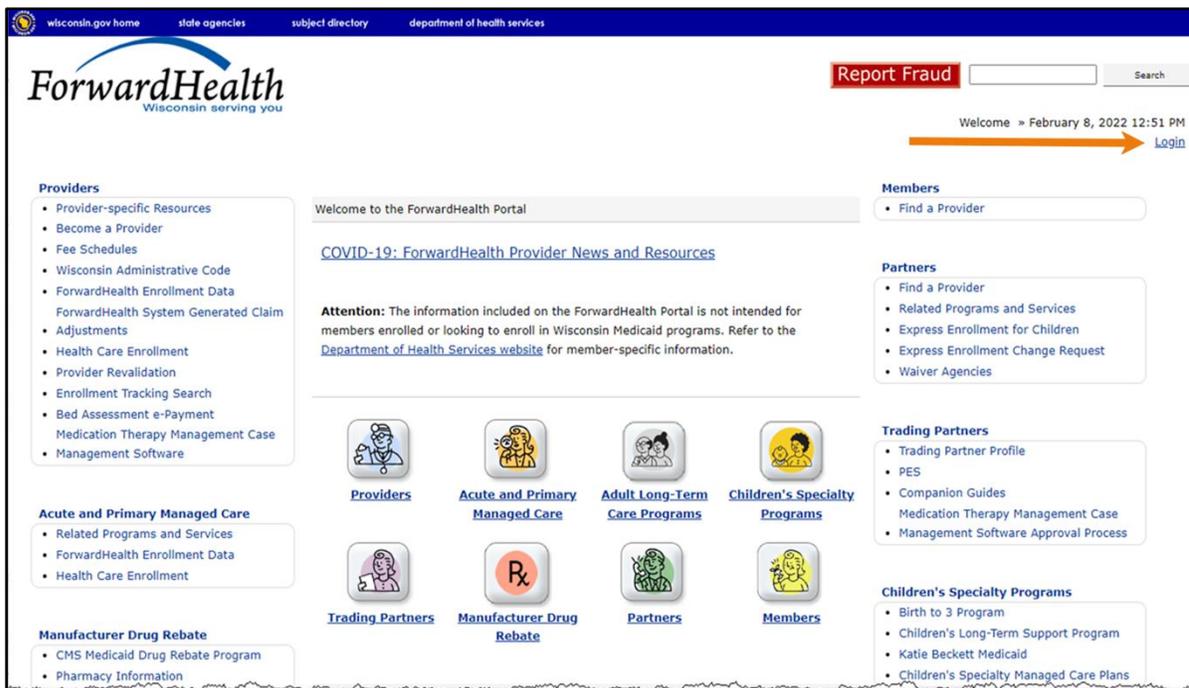
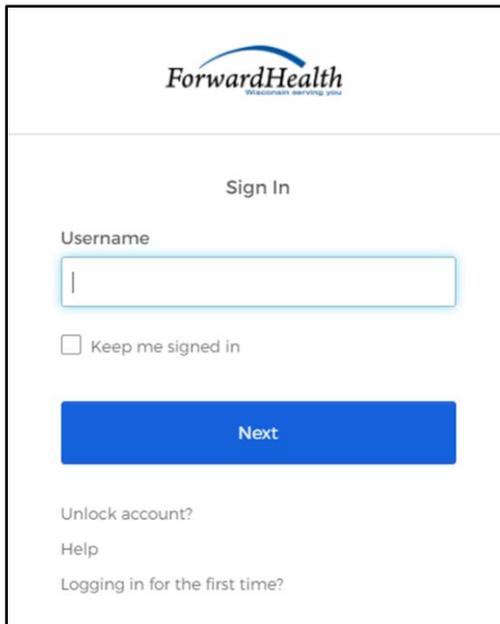


Figure 1 ForwardHealth Portal Page

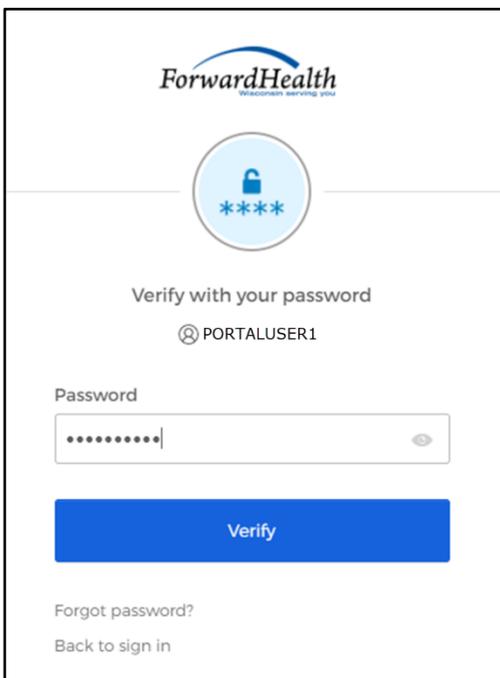
2. Click **Login**. A Sign In box will be displayed.



The screenshot shows the ForwardHealth logo at the top. Below it is the heading "Sign In". There is a "Username" label above a text input field. Below the input field is a checkbox labeled "Keep me signed in". A blue button labeled "Next" is positioned below the checkbox. At the bottom, there are three links: "Unlock account?", "Help", and "Logging in for the first time?".

**Figure 2** Sign In Box

3. Enter the user’s username.
4. Click **Next**. A Verify with your password box will be displayed.



The screenshot shows the ForwardHealth logo at the top. Below it is a circular icon containing a padlock and four asterisks. The heading "Verify with your password" is centered. Below the heading is the text "PORTALUSER1" with a user icon. There is a "Password" label above a text input field filled with asterisks. A blue button labeled "Verify" is positioned below the input field. At the bottom, there are two links: "Forgot password?" and "Back to sign in".

**Figure 3** Verify With Your Password Box

5. Enter the user's password.
6. Click **Verify**. The Secure Waiver Agency page will be displayed.

The screenshot displays the 'Secure Waiver Agency' page within the ForwardHealth interChange system. The page header includes the Wisconsin state logo, 'wisconsin.gov home', 'state agencies', and 'department of health services'. The main header features the 'ForwardHealth' logo with the tagline 'Wisconsin serving you', the 'interChange Waiver Agency' logo, and a welcome message: 'Welcome Waiver Agency Name > April 3, 2025 10:21 AM' with a 'Logout' link.

A navigation menu below the header contains links for Home, Search, Waiver Agency (highlighted), Prior Authorization, Account, Contact Information, Online Handbooks, Site Map, iC Functionality, User Guides, Certification, and Message Center.

The main content area shows the user is logged in as 'WAIVER AGENCY NAME' with a search box. Below this, there are three sections:

- CLTS User Guides**
  - Children's Long-Term Support Waiver Agency Portal
  - Children's Long-Term Support Waiver Agency Prior Authorization
  - Children's Long-Term Support Waiver High-Cost Request
  - Children's Long-Term Support Waiver Rate Setting Outlier Request
  - Children's Long Term Support Waiver Program Eligibility and Enrollment
  - Children's Long-Term Support Waiver Agency interChange Functionality
- CLTS Waiver Agency Training**
  - Currently, there are no CLTS Waiver Agency Trainings available.
- CLTS Waiver Agency Reports**
  - Enrollment Change Report
  - Total Member List Report
  - Disenrollment Report for Waiver Agencies
  - Predictive Disenrollment Report
  - Link Report for Waiver Agencies
  - Monthly Suspension Report for Waiver Agencies

On the right side, there are two sections:

- Account Information**
  - Switch Organization
- Quick Links**
  - Waiver Enrollment Wizard
  - Waiver Member Search
  - Waiver Pend Wizard
  - SUD Health Home User Guide
  - Letters
  - Waiver Agency Portal Admin
  - Change Request
  - High-Cost and Outlier Requests
  - Report Matrix

Figure 4 Secure Waiver Agency Page

# 4 Roles for Accessing the Children's Long-Term Support Rate Setting Outlier Request Processing Application

The account administrator must initially establish accounts to allow access and assign roles for the various functions the users will be performing when accessing the CRSOR processing application. Assigned roles for the CRSOR processing application are as follows:

- CLTS Outlier Request County Submitter
- CLTS Outlier Request LSS (Lutheran Social Services) Asst Submitter
- CLTS Outlier Request County Approver
- CLTS Outlier Request LSS Approver

Refer to [Appendix: User Security Roles](#) for more information about the required user security roles.

# 5 Accessing the Children's Long-Term Support Rate Setting Outlier Request Processing Application

1. From the secure Waiver Agency page, click **High-Cost and Outlier Requests** under Quick Links. Note: If the **High-Cost and Outlier Requests** link does not appear on the secure Waiver Agency page, the user does not have the correct security roles to access this functionality. If this user should have access and does not, the user should contact their local waiver agency administrator.

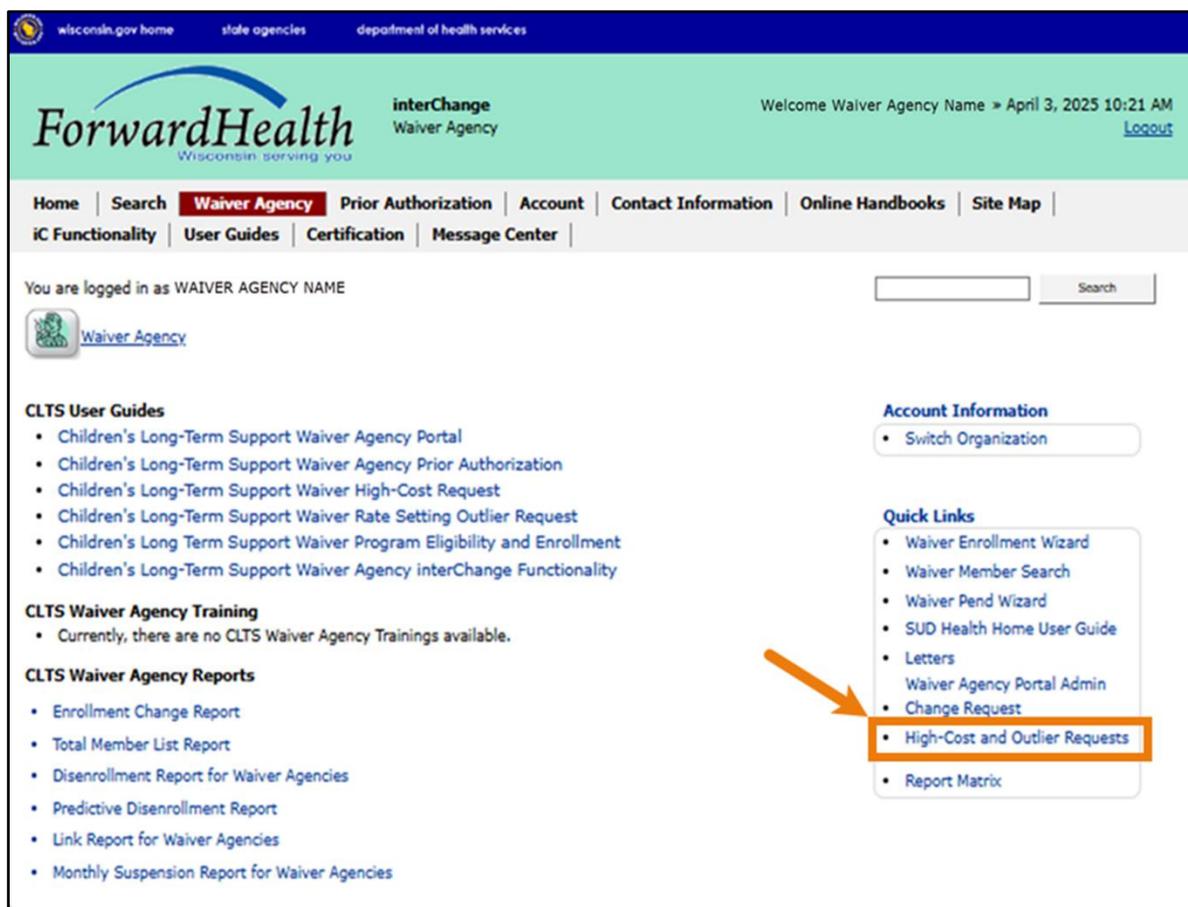
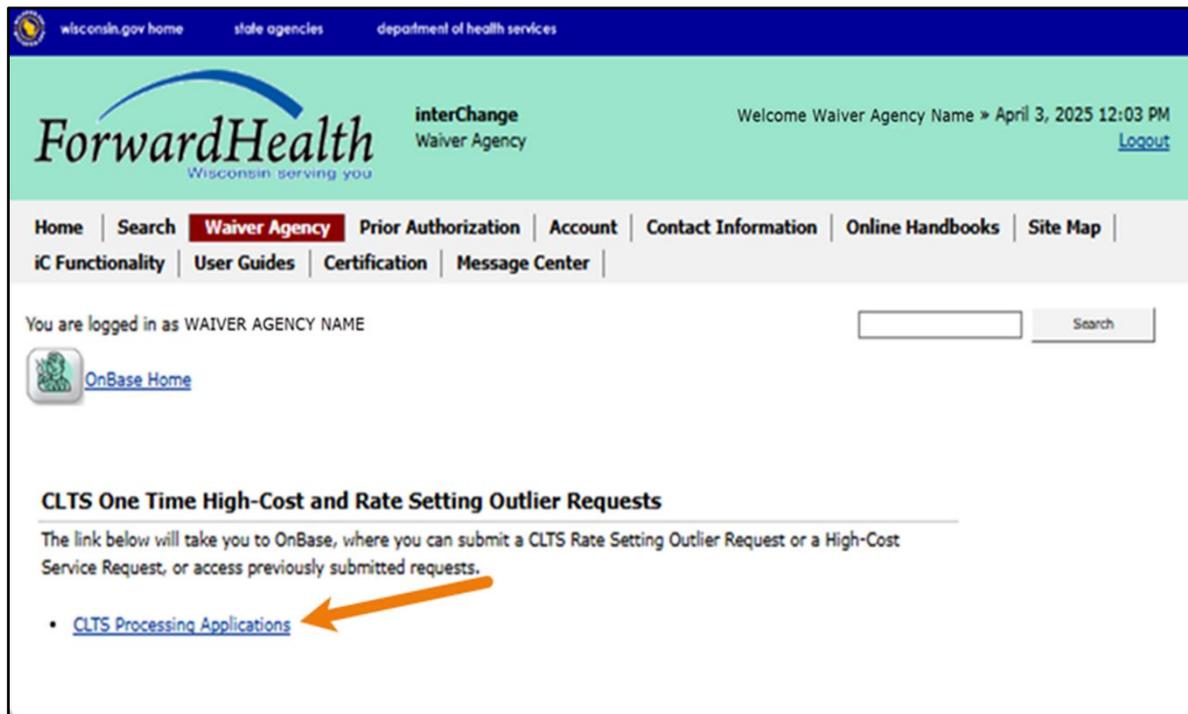


Figure 5 Secure Waiver Agency Page

The CLTS One Time High-Cost and Rate Setting Outlier Requests page will be displayed.



**Figure 6** CLTS One Time High-Cost and Rate Setting Outlier Requests Page

2. Click the **CLTS Processing Applications** link. A Sign In box will be displayed.

Connecting to 

Sign in with your account to access OnBase SAML - Production

**ForwardHealth**  
Wisconsin serving you

Sign In

Username

Keep me signed in

Next

[Unlock account?](#)

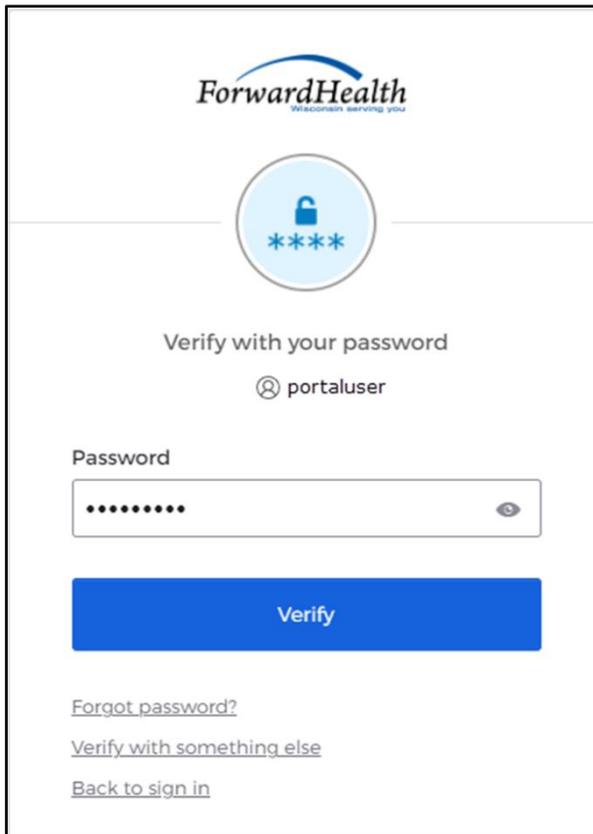
[Help](#)

Powered by Okta Privacy Policy

**Figure 7** Sign-In Box

3. Enter the username. Note: The user will use the same login information they used for logging in to the Portal.

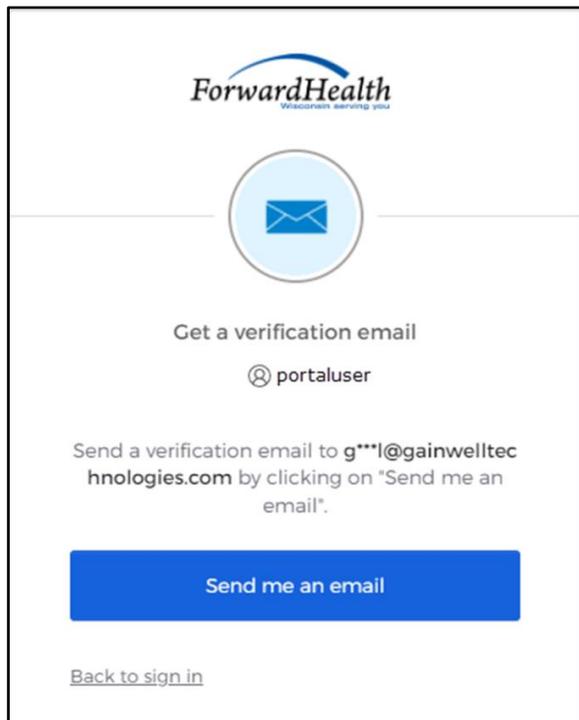
4. Click **Next**. A Verify with your password box will be displayed.



**Figure 8** Verify With Your Password Box

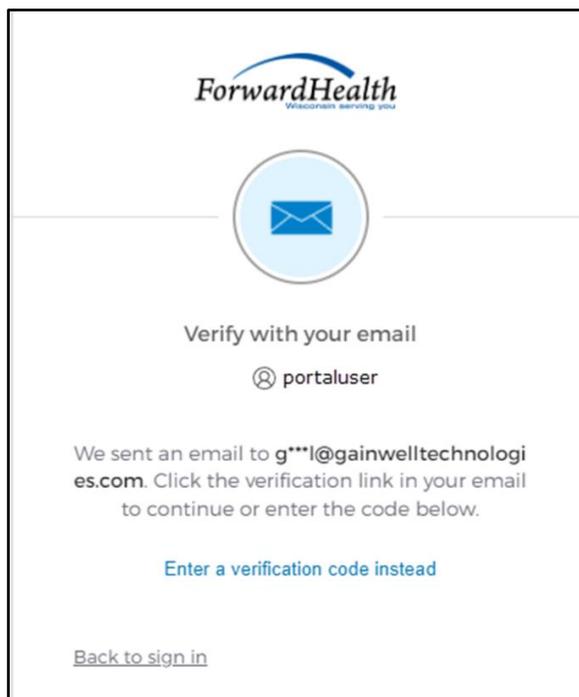
5. Enter the password.

- Click **Verify**. A Get a verification email box will be displayed.



**Figure 9** Get a Verification Email Box

- 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 10** Verify With Your Email Box

- 8. The email with the verification code sent to the user’s email address includes a **Sign In** link.

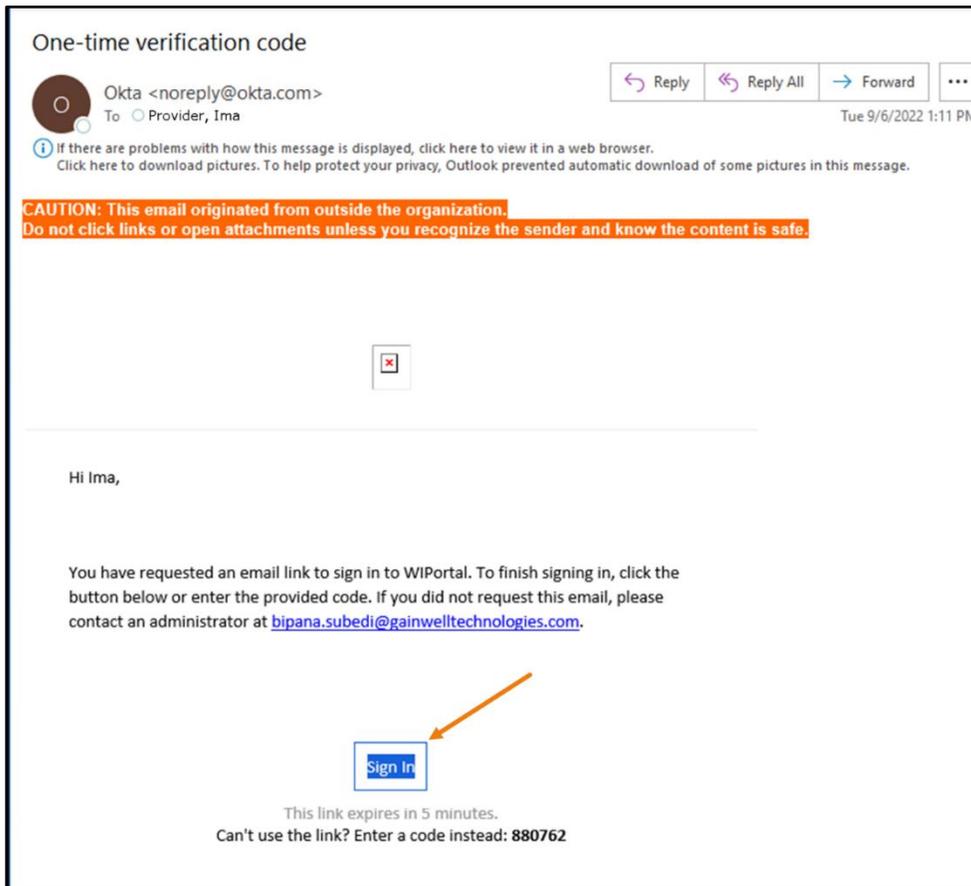
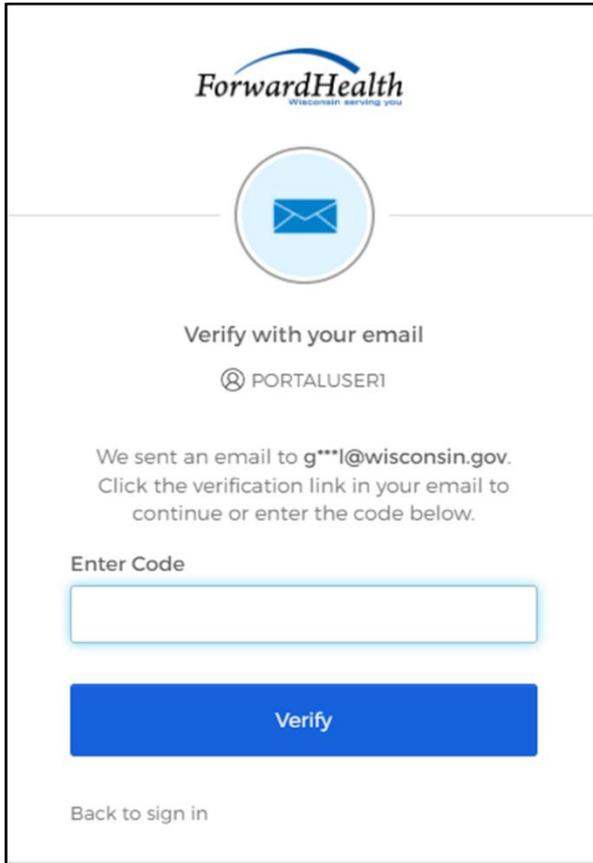


Figure 11 One-Time Verification Code Email

10. The user can choose to one of the following:

- Click the **Sign In** link in the email.
- Capture the verification code in the email, return to the browser window and click Enter a verification code instead. Enter the code from the email, and click **Verify**.



**ForwardHealth**  
Wisconsin serving you

Verify with your email

PORTALUSER1

We sent an email to g\*\*\*l@wisconsin.gov.  
Click the verification link in your email to  
continue or enter the code below.

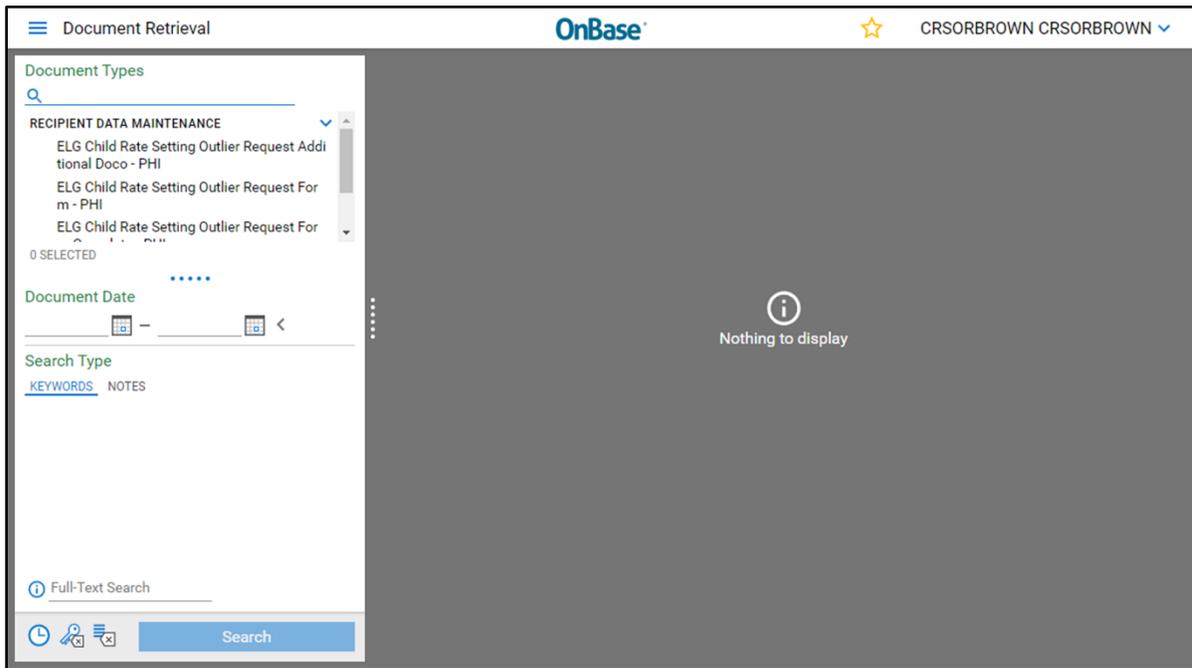
Enter Code

Verify

[Back to sign in](#)

**Figure 12** Verify With Your Email Box

The OnBase Document Retrieval screen will be displayed.

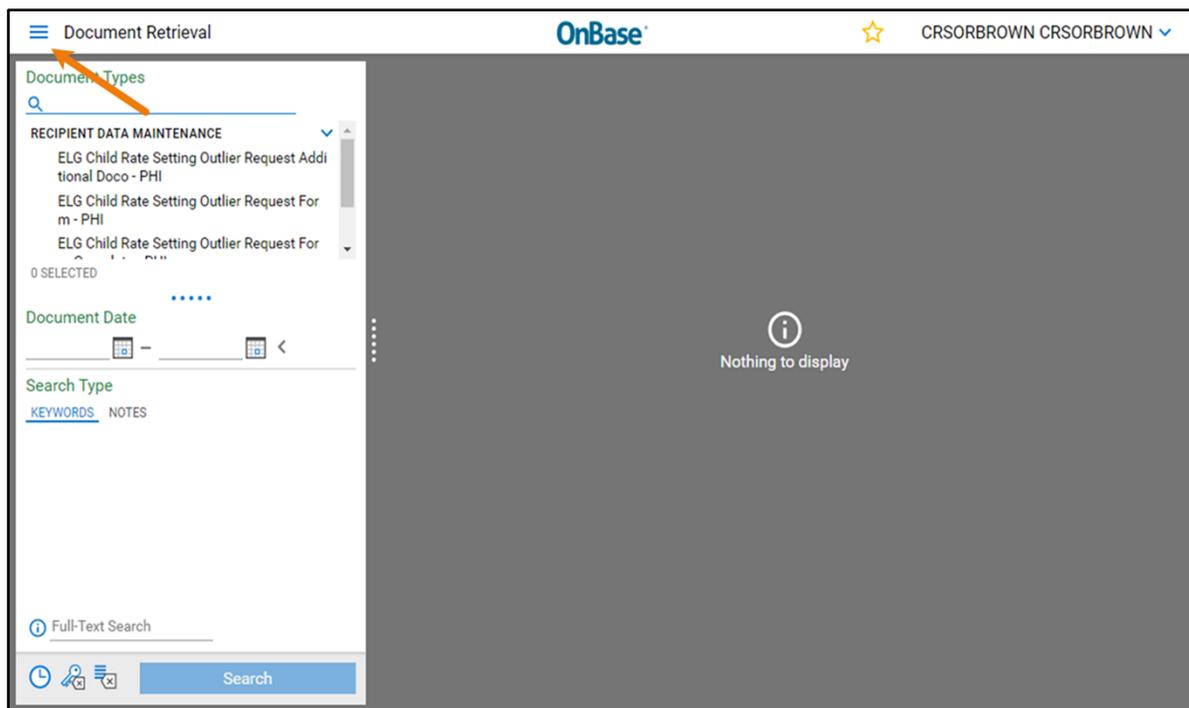


**Figure 13** OnBase Document Retrieval Screen

# 6 Creating and Submitting a Children's Long-Term Support Rate Setting Outlier Request

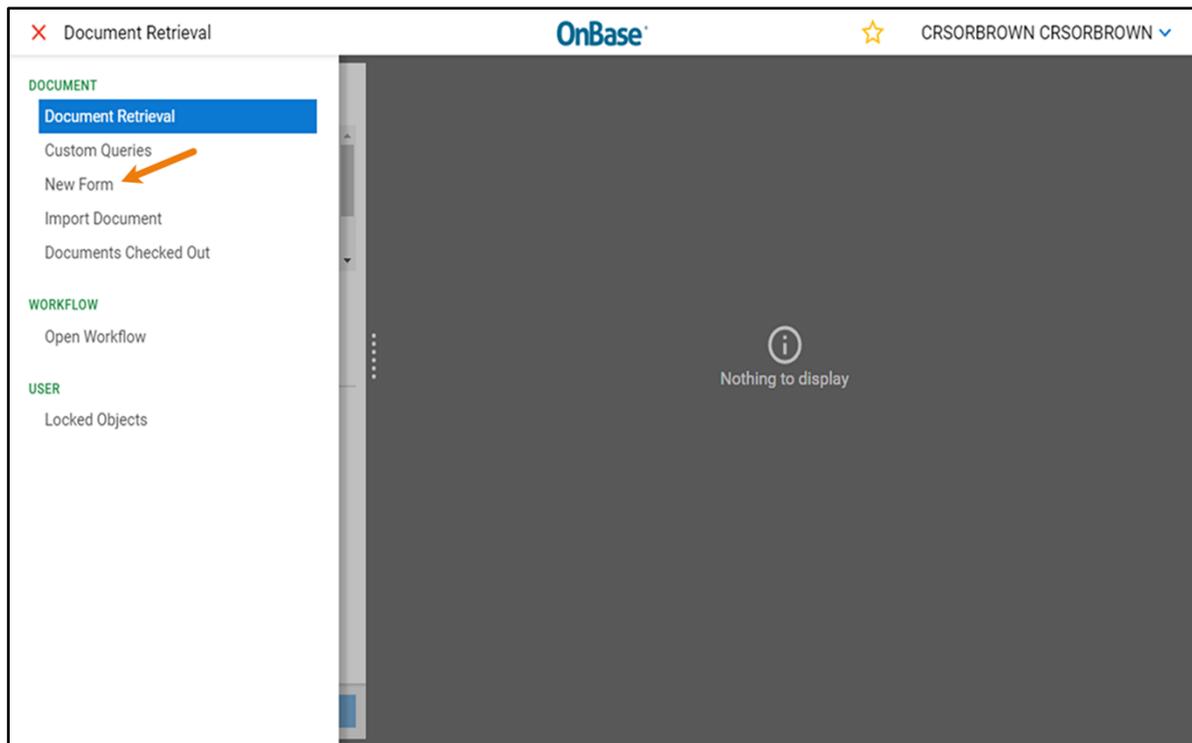
This functionality allows the user to create and submit a CRSOR for review.

1. Click the menu icon in the top left corner of the OnBase Document Retrieval screen.



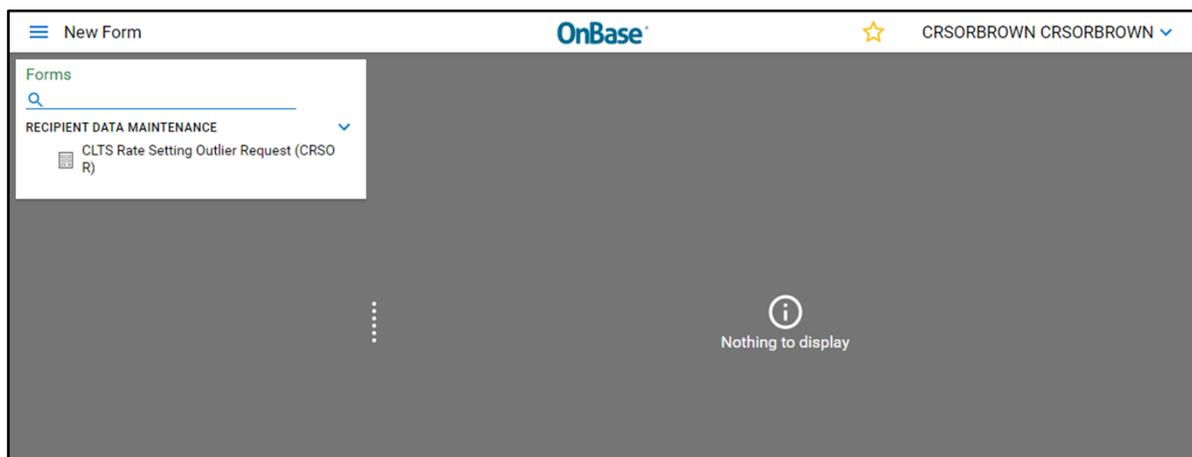
**Figure 14** OnBase Document Retrieval Screen—Menu Icon

2. A menu of options will be displayed on the left side of the screen. Select **New Form**.



**Figure 15** OnBase Document Retrieval Screen—New Form

Available forms will be listed under the Forms menu on the left side of the screen.



**Figure 16** OnBase New Form Screen

3. Click **CLTS Rate Setting Outlier Request (CRSOR)**. A blank CRSOR will be displayed.

**OnBase** CRSORBROWN CRSORBROWN

**CLTS Rate Setting Outlier Request (CRSOR)**

County\* [dropdown] Administrative Support Organization\* [dropdown] Submission ID: 1212 Submission Date: 07/21/2023

**Participant Information**

Participant MCI\* [input] Participant First Name\* [input] Participant Last Name\* [input] Participant DOB\* [input]

Clear Participant

**County Waiver Agency Information**

County Waiver Agency Name\* [dropdown] Submitter Name\* [input]

Submitter Email\* [input] Submitter Phone Number\* [input]

Approver Name\* [input] Approver Email\* [input]

CC Email Address (separate each address with a comma) [input]

**CLTS Outlier Request**

**CWA Section**

Service Category\* [dropdown] Federal Procedure Code\* [dropdown]

Individual Care Need\* [dropdown] CLTS Rate Schedule Amt\* [input]

Provider Access\* [dropdown] CLTS Rate Unit Type\* [dropdown]

Billing Provider Name\* [input] Outlier Request Rate Amt\* [input]

Billing Provider Tax ID\* [input] Outlier Request Unit Type\* [dropdown]

Rendering Provider Name\* [input] Number of Units Requested per Week\* [input]

Rationale for Outlier\* [input]

**DHS Section**

Review Determination [dropdown]

DHS Representative [input] DHS Determination Date [input]

**CRSOR Provider Form (0)**

Document Name	Attachment Type	Actions
CRSOR Provider Form		Attach

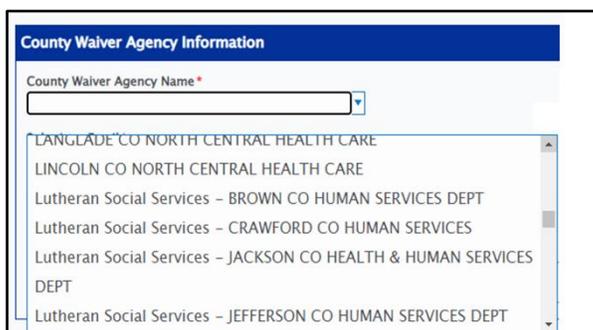
**DHS Notes** [Add]

**CWA Notes** [Add]

Submit

Figure 17 CLTS Rate Setting Outlier Request (CRSOR)

4. At the top of the CRSOR, select information for the following fields:
  - County\*—Select the county from the drop-down menu.
  - Administrative Support Organization\*—This field indicates whether the user is an employee of an administrative support organization. If the user submitting the CRSOR is an employee of an administrative support organization, the appropriate administrative support organization should be selected from the drop-down menu. County workers should select “N/A.”
5. Search for the participant by entering the Participant Master Client Index (MCI) number and then clicking the County Waiver Agency Name\* drop-down menu. This will trigger a search query in interChange. The form will not allow input in any fields until the query is complete. The visual clue that the query is complete is that the County Waiver Agency Name\* field will present values in its drop-down menu. When this happens, inspect the Participant Information fields.
  - If only one participant is found, the Participant First Name\*, Participant Last Name\*, and Participant DOB\* fields will be automatically filled.
  - If multiple participants are found, a table will be displayed listing the participants. Select the appropriate participant.
  - If no participant is found, nothing will appear in the Participant First Name\*, Participant Last Name\*, or Participant DOB\* fields. Do not manually enter values. Verify the correct Participant MCI was entered. Click **Clear Participant** to do a new search. Note: OnBase will not allow a CRSOR to be submitted without a participant identified.
  - The **Clear Participant** button will clear out all values in the Participant Information fields.
6. Under the County Waiver Agency Information panel, enter or select information for the following fields. Note: All fields with an asterisk are required.
  - County Waiver Agency Name\*—Select the CWA name from the drop-down menu. Note that administrative support organizations are listed by their name and then the county they serve.



The screenshot shows a web form titled "County Waiver Agency Information". It features a dropdown menu labeled "County Waiver Agency Name\*" which is currently open, displaying a list of agency names. The list includes "LANGLADE CO NORTH CENTRAL HEALTH CARE", "LINCOLN CO NORTH CENTRAL HEALTH CARE", "Lutheran Social Services - BROWN CO HUMAN SERVICES DEPT", "Lutheran Social Services - CRAWFORD CO HUMAN SERVICES DEPT", "Lutheran Social Services - JACKSON CO HEALTH & HUMAN SERVICES DEPT", and "Lutheran Social Services - JEFFERSON CO HUMAN SERVICES DEPT".

**Figure 18** County Waiver Agency Information

- Submitter Name\*—Enter the name of the person submitting the form.

- Submitter Email\*—Enter the email of the person submitting the form. Note: If a participant was not found by the search query, error messages will appear at the top of the form.

The screenshot shows the OnBase interface for the CLTS Rate Setting Outlier Request (CRSOR) form. At the top, there are three yellow error messages: 'Participant First Name: Participant not found. Enter a valid Participant MCI.', 'Participant DOB: Participant not found. Enter a valid Participant MCI.', and 'Participant Last Name: Participant not found. Enter a valid Participant MCI.'. Below the errors, the form title is 'CLTS Rate Setting Outlier Request (CRSOR)'. The form contains several sections: 'County' (dropdown), 'Administrative Support Organization' (dropdown), 'Submission ID' (text: 1229), and 'Submission Date' (text: 10/12/2023). The 'Participant Information' section includes 'Participant MCI' (text: 1123456787), 'Participant First Name', 'Participant Last Name', and 'Participant DOB' (all redacted), and a 'Clear Participant' button. The 'County Waiver Agency Information' section includes 'County Waiver Agency Name' (dropdown: BROWN CO HUMAN SERVICES DEPT), 'Submitter Name' (text: Jane Doe), 'Submitter Email', 'Submitter Phone Number', 'Approver Name', and 'Approver Email'.

**Figure 19** CLTS Rate Setting Outlier Request (CRSOR)—Error Messages

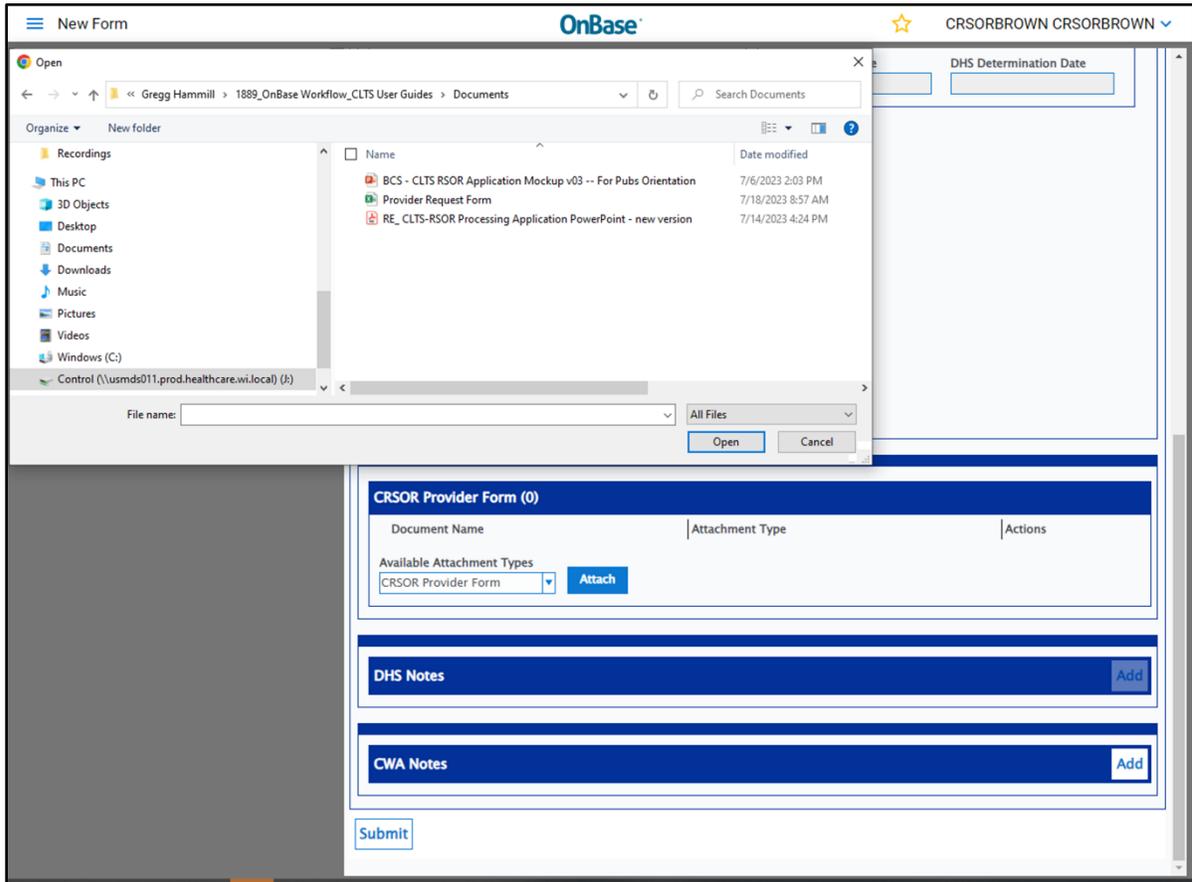
- Submitter Phone Number\*—Enter the phone number of the person submitting the form.
  - Approver Name\*—Enter the name of the person authorized to approve CRSORs for the organization.
  - Approval Email\*—Enter the email of the person authorized to approve CRSORs for the organization.
  - CC Email Address (Separate each email address with a comma.)—Enter any cc email addresses with each address separated by a comma. CC email addresses will receive a copy of notification emails when any activity on the CRSOR occurs, including DHS determination.
7. Under the CWA panel, enter or select information for the following fields:
- Service Category\*—Select the service category from the drop-down menu.
  - Federal Procedure Code\*—Select the federal procedure code from the drop-down menu.
  - Individual Care Need\*—Select “Yes” if the CRSOR is being submitted due to the participant’s exceptional individual care needs or “No.”

- CLTS Rate Schedule Amt\*—Enter the CLTS rate schedule amount using the most current [CLTS Waiver Program Rate Schedule](#) and [CLTS Program Benefit Code Crosswalk](#).
  - Provider Access\*—Select “Yes” if the CRSOR is being submitted due to provider access issues or “No.”
  - CLTS Rate Unit Type\*—Select the CLTS rate unit type from the drop-down menu. The unit rate type must match the federal procedure code.
  - Billing Provider Name\*—Enter the billing provider’s name.
  - Outlier Request Rate Amt\*—Enter the outlier request rate amount.
  - Billing Provider Tax ID\*—Enter the billing provider’s tax ID number.
  - Outlier Request Unit Type\*—Select the outlier request unit type from the drop-down menu. Unit rate type must match the federal procedure code.
  - Rendering Provider Name\*—Enter the rendering provider’s name. This could be the same as the Billing Provider Name or an Individual Family-Chosen Provider Name when the Billing Provider is a Financial Management Services Agency.
  - Number of Units Requested per Week\*—Enter the number of units requested per week.
  - Rationale for Outlier\*—Enter the rationale for the outlier in the free text box. Text is limited to 1,000 characters. If more space is needed, the user can add additional details to a Word document and attach it to the CRSOR.
8. All fields in the DHS panel are read-only and cannot be modified.
9. To attach any documents to the form, such as the CLTS Provider Cost-Based Outlier form, F-02538A, select the type of document to be attached from the drop-down menu under the CRSOR Provider Form panel. The default value is CRSOR Provider Form. If anything other than a provider form is to be attached, select “Additional Documentation.”

The screenshot displays the 'CRSOR Provider Form (0)' interface. It features a table with columns for 'Document Name', 'Attachment Type', and 'Actions'. Under the 'Available Attachment Types' section, there is a dropdown menu currently showing 'CRSOR Provider Form' and an 'Attach' button. Below the dropdown, a list of options is visible, including 'CRSOR Provider Form' and 'Additional Documentation'. At the bottom of the form, there is a 'DHS Notes' section with an 'Add' button.

**Figure 20** CRSOR Provider Form Option

- Click **Attach**. A File Explorer window will appear. Navigate to the desired document, select it, and click **Open**.



**Figure 21** CLTS Rate Setting Outlier Request (CRSOR)—CRSOR Provider Form Panel

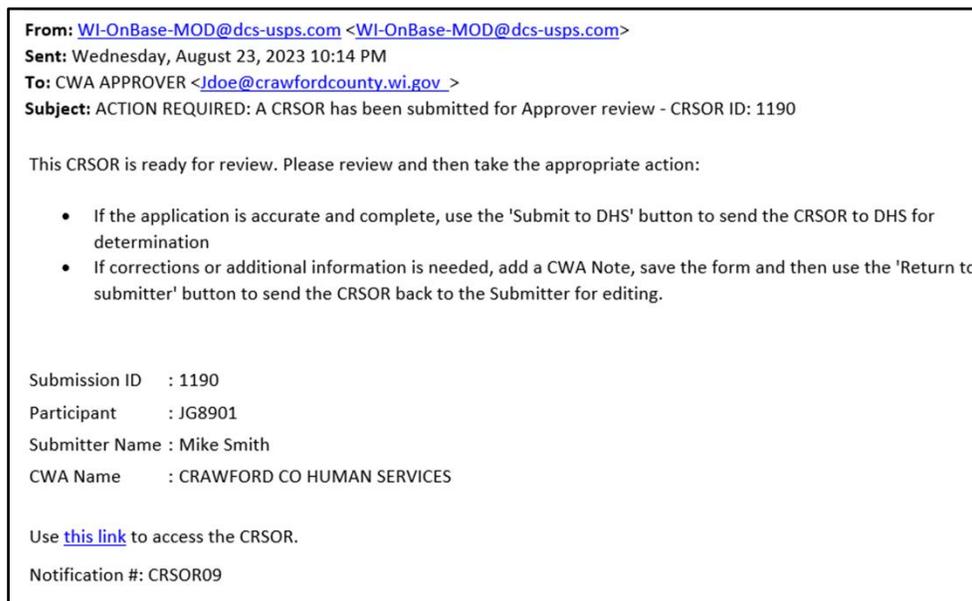
- The attachment will be uploaded and appear as a link in the CRSOR Provider Form panel. The link can be removed, if necessary, by clicking **Remove**.

**Figure 22** CLTS Rate Setting Outlier Request (CRSOR)—Document Uploaded

- The user can add a note by clicking the **Add** button in the CWA Notes panel to bring up the free text box under the CWA Note Description\* field.

**Figure 23** CLTS Rate Setting Outlier Request (CRSOR)—CWA Notes Panel

13. Click **Submit**. If any required field is missing values, error messages will appear at the top of the screen. If there are no issues, the CRSOR will be submitted to the CWA Approver identified in the CRSOR for review. A popup box will appear asking the user if another form is to be created. Select “Yes” to create another CRSOR, or select “No.”
14. A CRSOR09 email notification will be sent to inform the CWA Approver that a CRSOR needs to be reviewed.

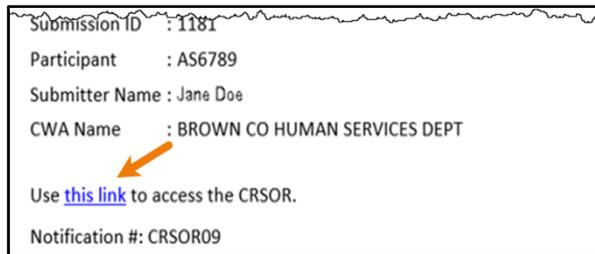


**Figure 24** Submitted to Approver Email—CRSOR09

# 7 County Waiver Agency Approver Queue

The CWA Approver assumes control of the CRSOR in the CWA Approver Review queue.

1. Click the link from the email notification to open OnBase.



**Figure 25** Approver Review Email With Link

2. Go through the authentication and login process detailed in the [Accessing the Children's Long-Term Support Rate Setting Outlier Request Processing Application](#) chapter. Proceed to [Step 4](#).
3. The Approver can also manually navigate to the screen by using the following steps.
  - a. Login to the ForwardHealth Portal and click the link on the secure Waiver Agency page to open OnBase.
  - b. Go through the authentication and login process detailed in the [Accessing the Children's Long-Term Support Rate Setting Outlier Request Processing Application](#) chapter.

- c. OnBase will appear showing the Document Retrieval Screen. Click the menu icon in the top left corner.

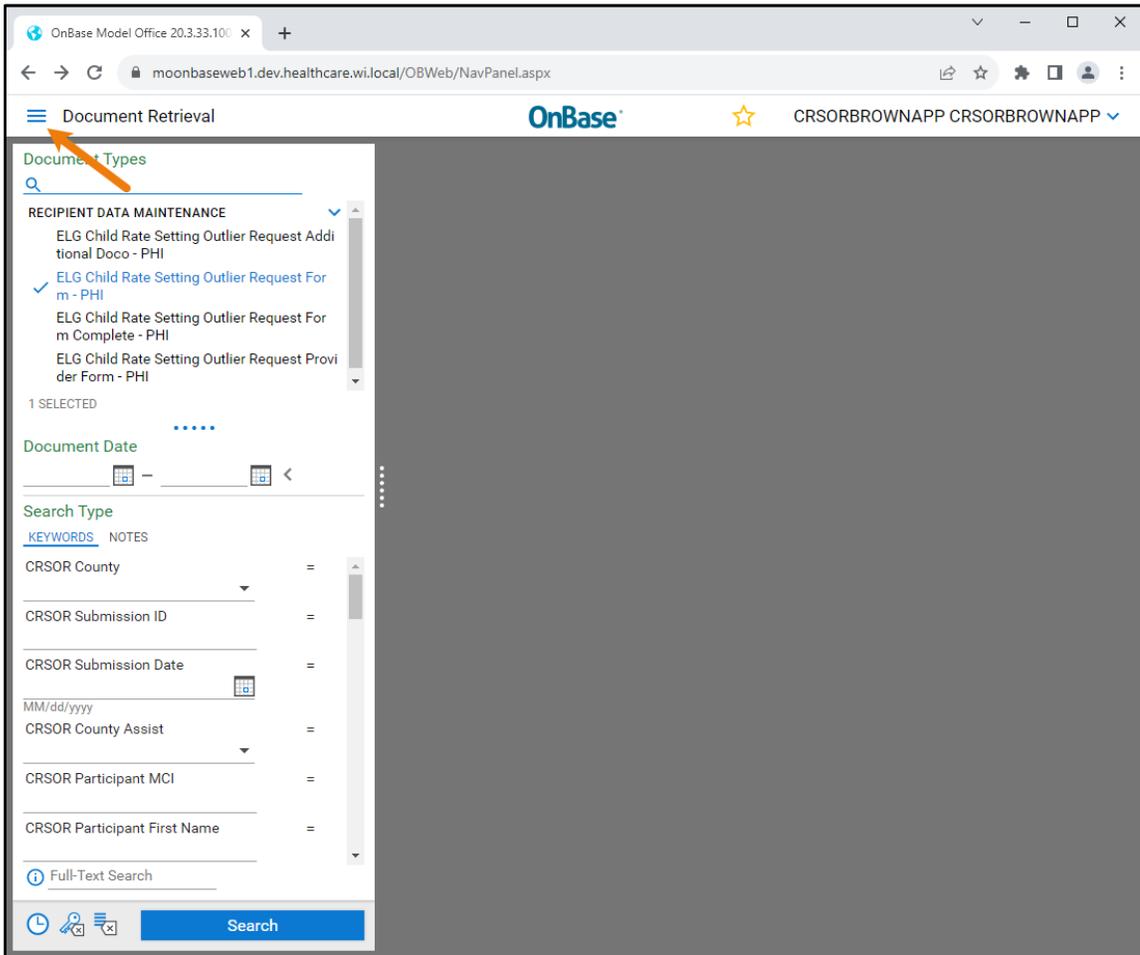


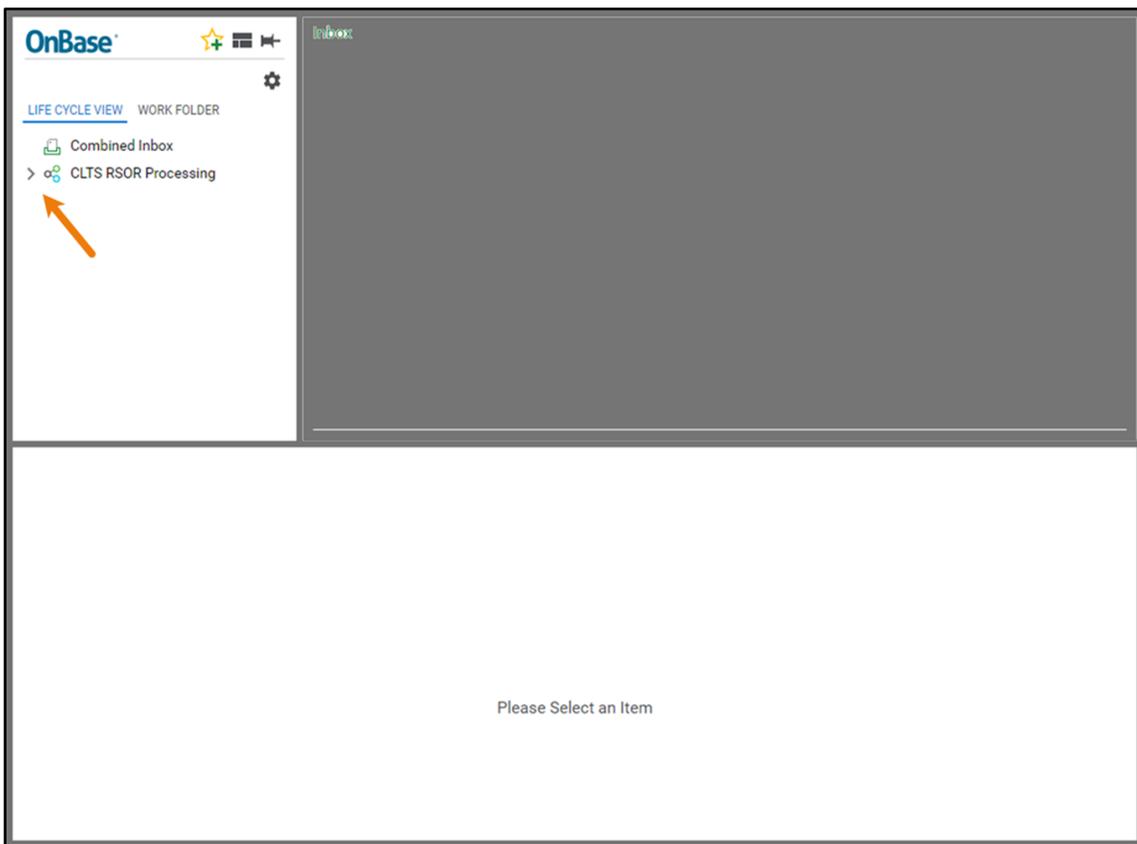
Figure 26 OnBase Document Retrieval Screen

- d. A menu of options will be displayed on the left side of the screen. Hold down the Ctrl key and click **Open Workflow** to make another tab appear in the same browser.



Figure 27 OnBase Document Retrieval Screen—Open Workflow

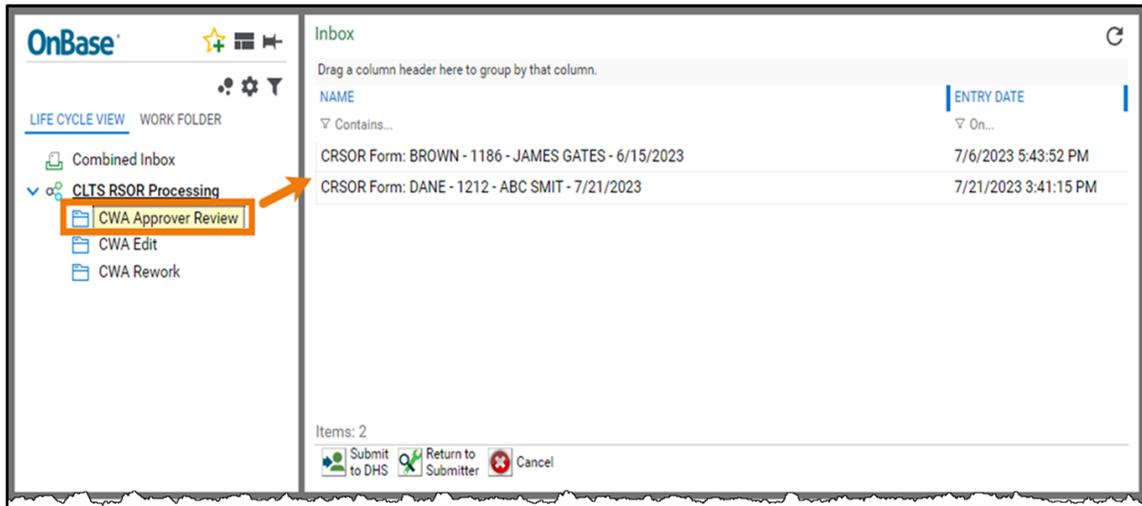
The OnBase processing screen will be displayed.



**Figure 28** OnBase Processing Screen

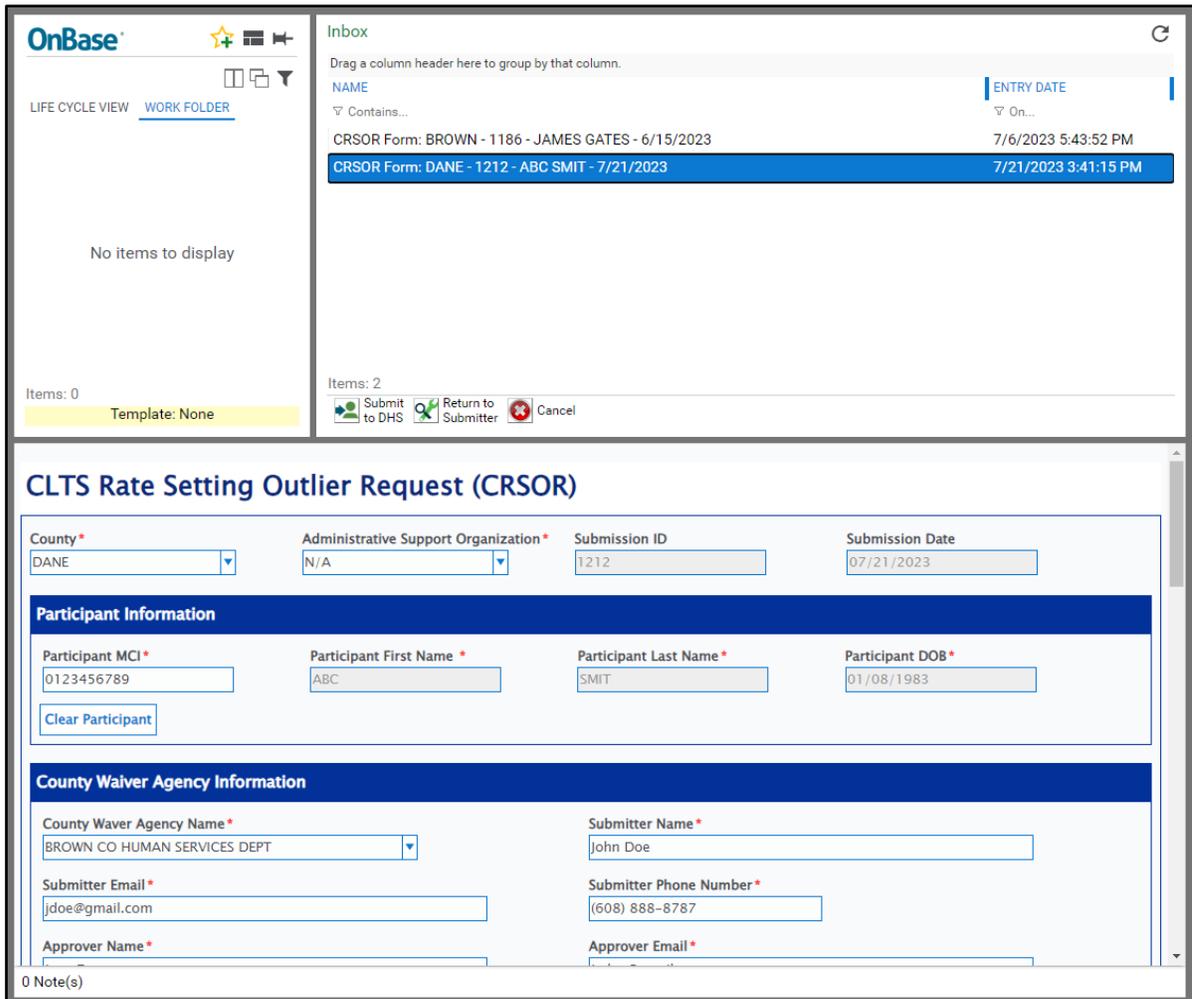
- e. Expand the CLTS RSOR Processing Lifecycle by clicking the arrow next to the CLTS RSOR Processing icon.

- f. Click on the **CWA Approver Review** queue link. Links to all of the CRSORs in the queue will be displayed in the Inbox panel.



**Figure 29** OnBase Processing Screen With Links to CRSORs

- Click the desired CRSOR link and the CRSOR will be displayed in the bottom half of the screen.



**Figure 30** OnBase Processing Screen With CRSOR

- If changes are made to the entries on the form, click the **Save** button at the bottom of the form.

- 6. After reviewing the CRSOR, the Approver can choose from the following three action buttons located at the bottom of the inbox.

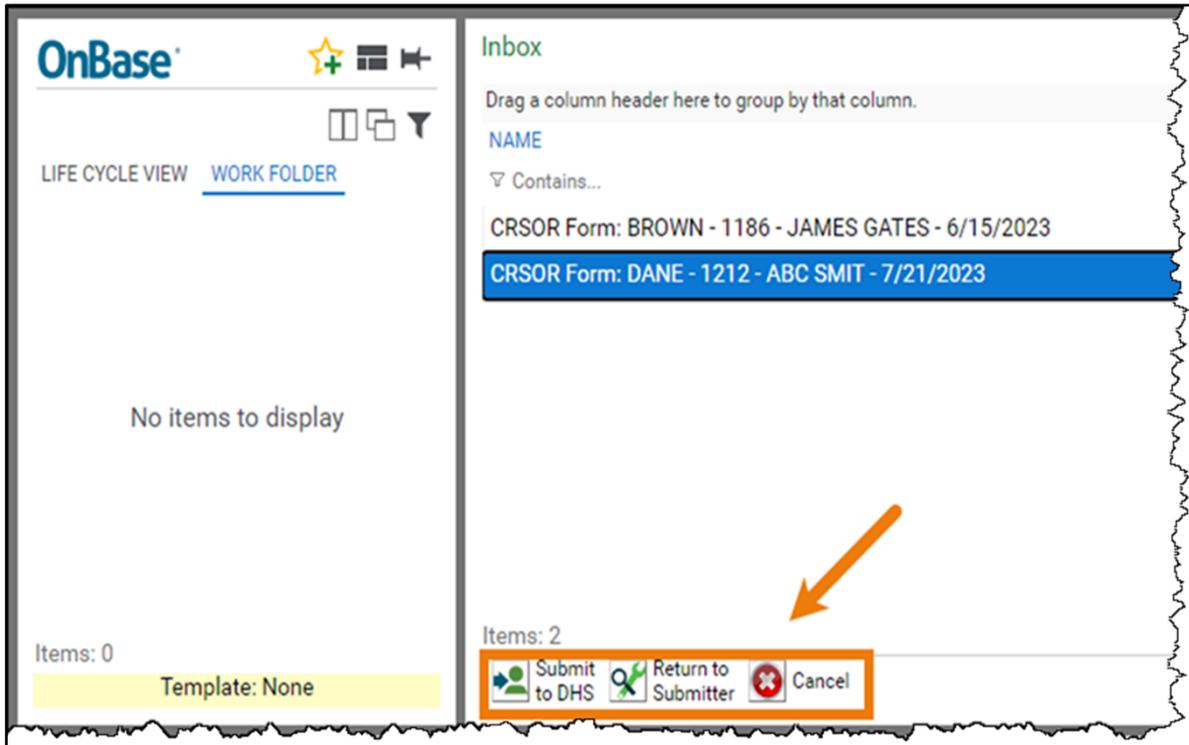
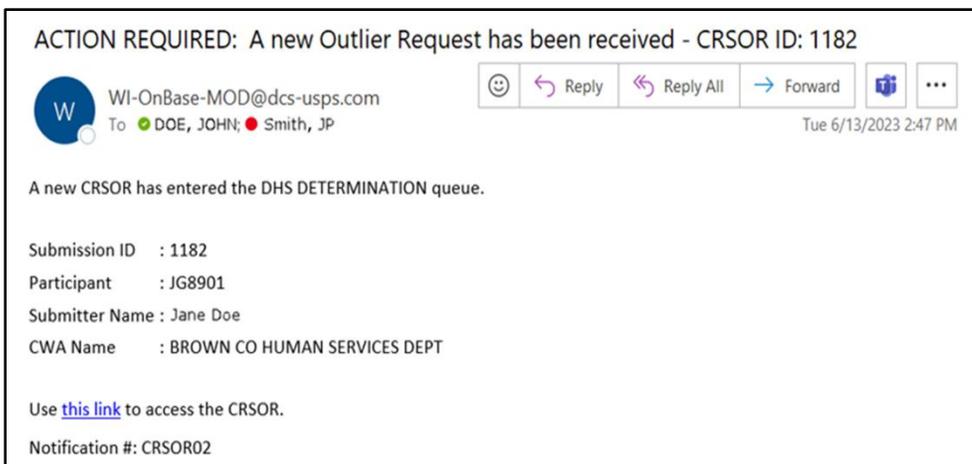


Figure 31 OnBase Processing Screen—Action Buttons

- **Submit to DHS**—Selecting **Submit to DHS** sends the CRSOR to DHS for determination. This generates the CRSOR01 email notification which is sent to the Submitter, Approver, and CC addressees on the CRSOR. The CRSOR02 email notification is sent to DHS.

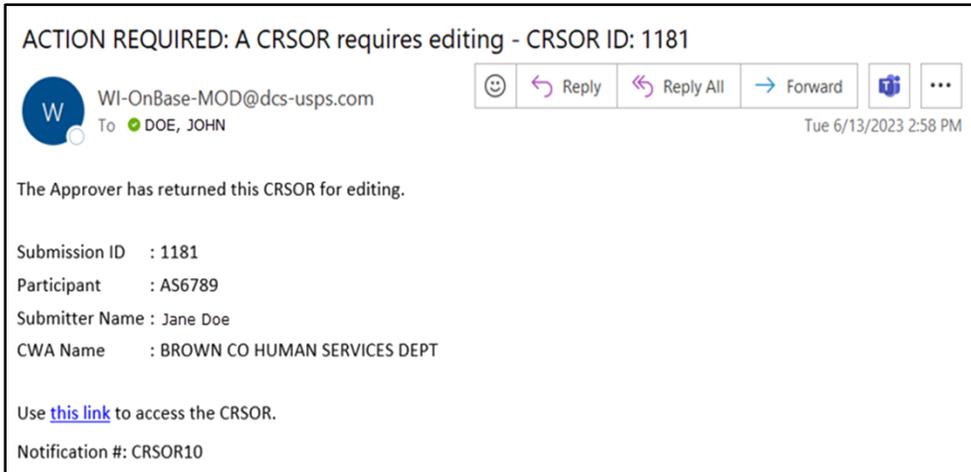


**Figure 32** CRSOR Submittal Confirmation—CRSOR01 Sent to Submitter, Approver, and CC Addressees



**Figure 33** CRSOR Entered DHS Determination Queue Email—CRSOR02 Sent to DHS

- **Return to Submitter**—Selecting **Return to Submitter** moves the CRSOR to the CWA Edit queue and generates the CRSOR10 email notification, which is sent to the Submitter and CC addressees on the CRSOR. The Approver should add a CWA Note to explain why the CRSOR is being returned before using this button.



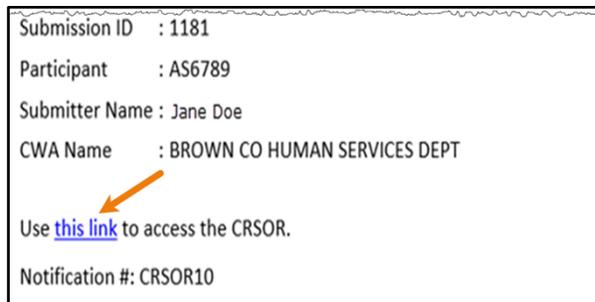
**Figure 34** Approver Returned to Submitter Email—CRSOR10 Sent to Submitter and CC Addressees

- **Cancel**—Selecting **Cancel** deletes the CRSOR from OnBase.

## 8 County Waiver Agency Edit Queue

The CWA Edit queue allows the Submitter address any comments from the CWA Approver, edit the CRSOR and then move it back to the CWA Approver Review queue. The Approver also has the ability to perform these actions in this queue.

1. Click the link from the email notification to access the CRSOR that has been returned.



**Figure 35** Approver Review Email With Link

2. Go through the authentication and login process detailed in the [Accessing the Children's Long-Term Support Rate Setting Outlier Request Processing Application](#) chapter.

The CRSOR will be displayed.

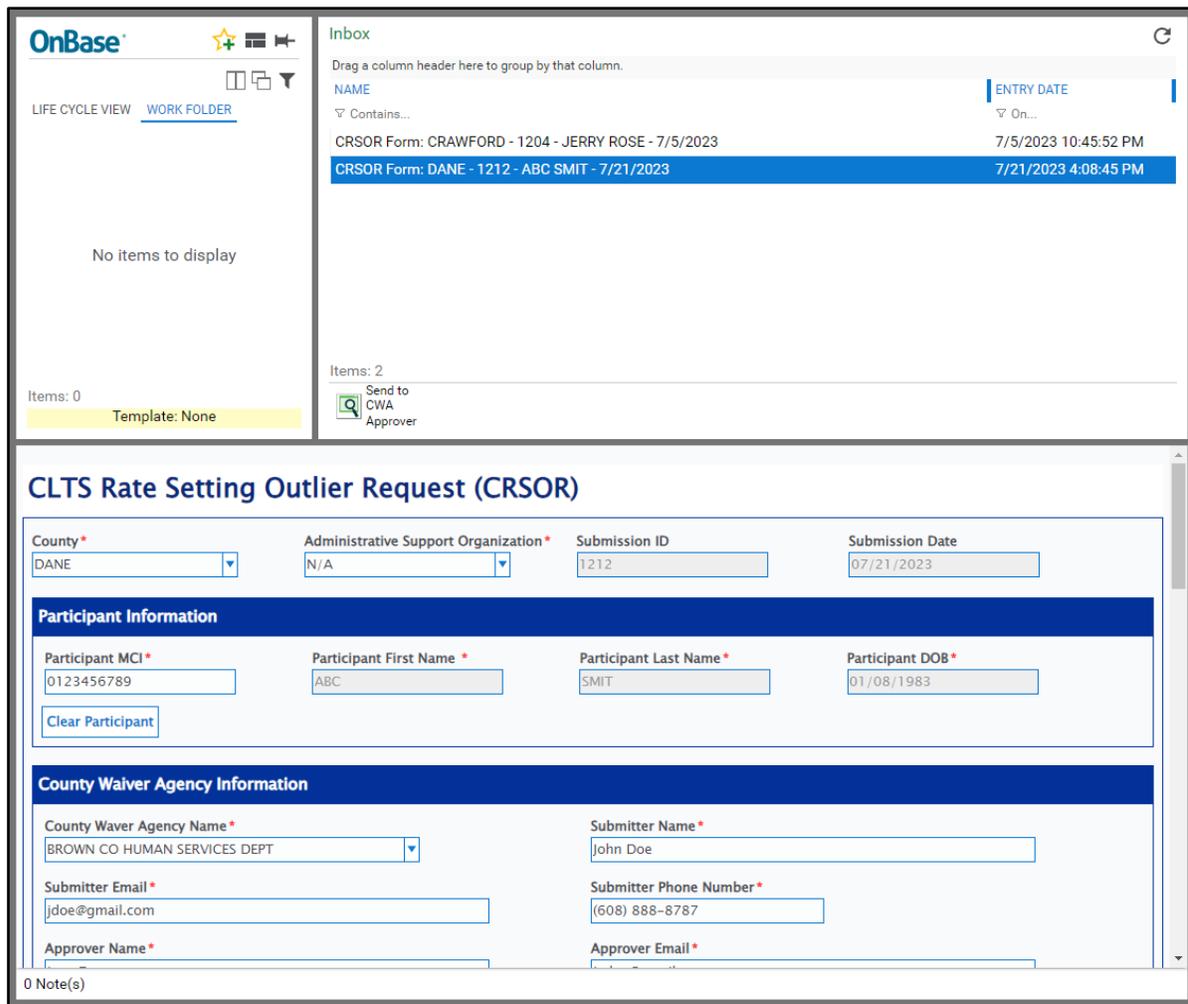
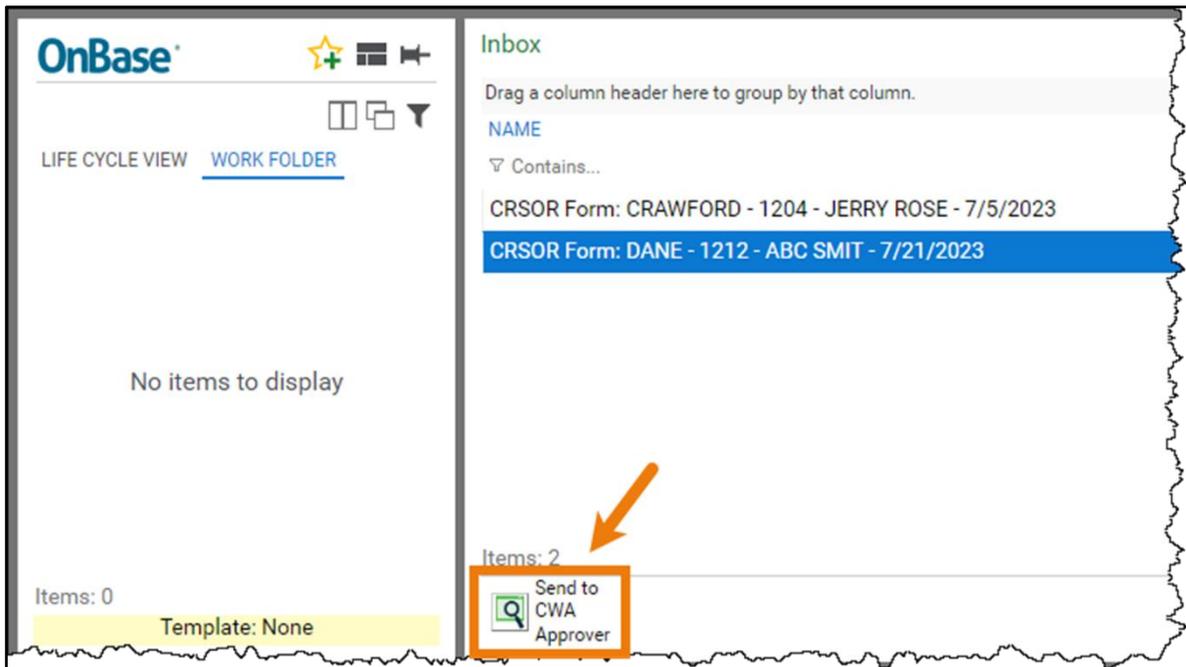


Figure 36 CWA Edit Screen

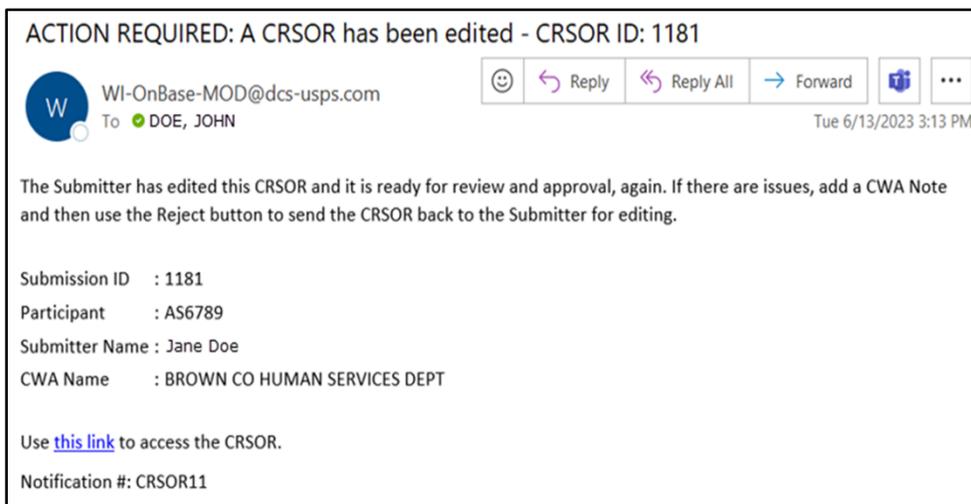
3. The Submitter can make the necessary changes to the CRSOR and add text to the CWA Notes panel. Changes must be saved using the **Save** button at the bottom of the CRSOR before using the **Send to CWA Approver** action button.

4. Click the **Send to CWA Approver** button to move the CRSOR back to the CWA Approver Review queue.



**Figure 37** OnBase Processing Screen – Send to CWA Approver

This will generate the CRSOR11 email notification, which is sent to the Approver.



**Figure 38** Edited CRSOR Email—CRSOR11 Sent to Approver

# 9 Department of Health Services Determination Queue

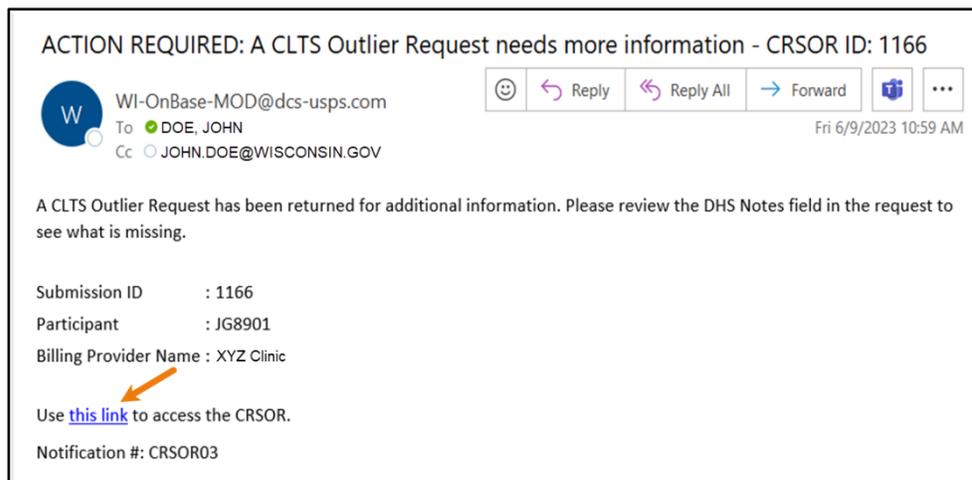
Once the CRSOR is submitted by the Approver, it is moved to the DHS Determination queue where CRSORs are reviewed by DHS. DHS will take one of three actions:

- Send the CRSOR back to the Submitter for additional information. This is the [CWA Rework queue](#).
- Put on hold while internal decisions are made. This is the DHS Hold queue.
- Finalize a determination and remove the CRSOR from the workflow.

# 10 County Waiver Agency Rework Queue

The CWA Rework queue allows the Submitter to address any comments from DHS, edit the CRSOR, attach additional documentation when applicable, and then move it back to the DHS Determination queue.

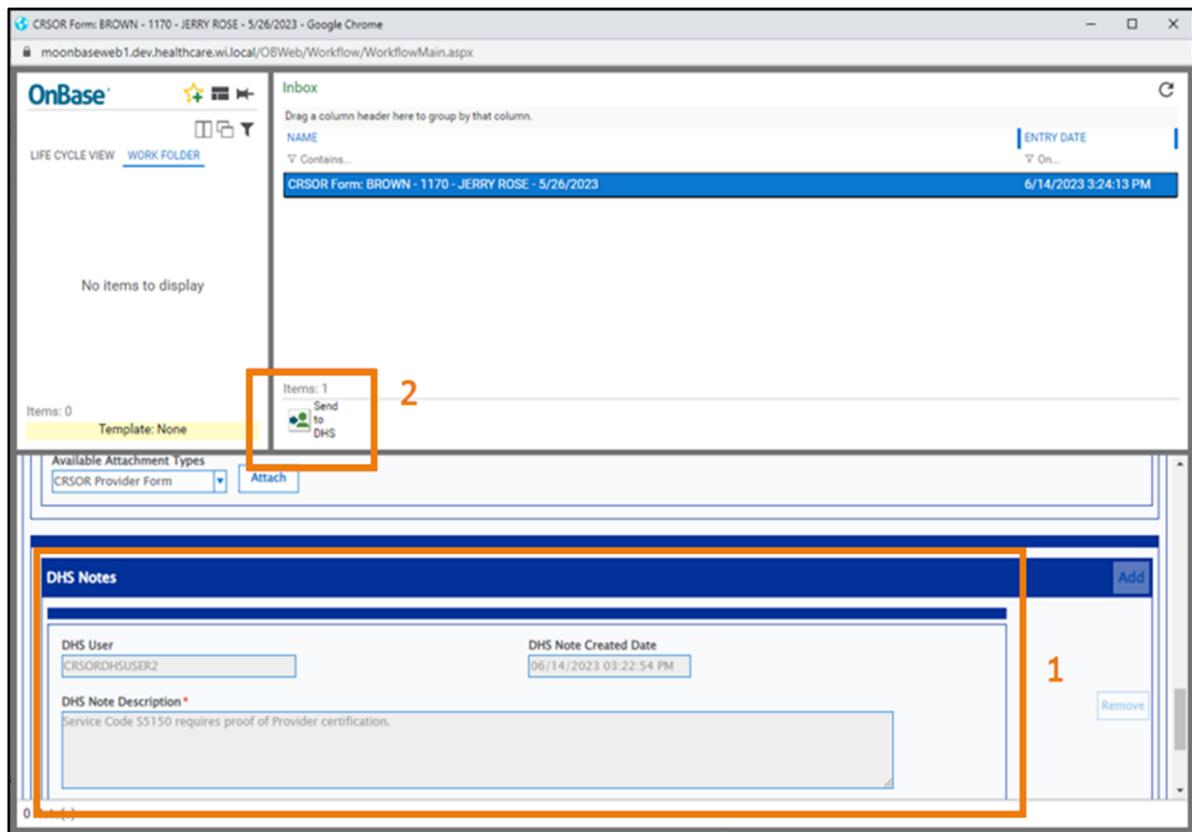
1. Click the link from the email notification to access the CRSOR that has been returned.



**Figure 39** CRSOR Returned to Submitter Email Sent to Submitter and CC Addressees

2. Go through the authentication and login process detailed in the [Accessing the Children's Long-Term Support Rate Setting Outlier Request Processing Application](#) chapter.

The CWA Rework queue will be displayed.



**Figure 40** CWA Rework Queue

3. The Submitter should check the DHS Notes panel to learn what the issue is.
4. Make any necessary correction(s), click the **Save** button, and then click the **Send to DHS** button to move the CRSOR back to the DHS Determination queue.

Note: CRSORs sitting in the CWA Rework queue for extended periods will generate the following responses:

- A CRSOR sitting in the CWA Rework queue for seven days will generate a CRSOR05 email notification to be sent to the Submitter, Approver, and the CC addressees to warn them.
- A CRSOR sitting in the CWA Rework queue for 14 days will generate a CRSOR06 email notification to be sent to the Submitter, Approver, and the CC addressees to remind them.
- A CRSOR sitting in the CWA Rework queue for 21 days will generate OnBase to move the CRSOR back to the DHS Determination queue. DHS will archive the CRSOR by denying it for lack of necessary information. The CRSOR cannot be reopened after denial. A new CRSOR must be submitted.

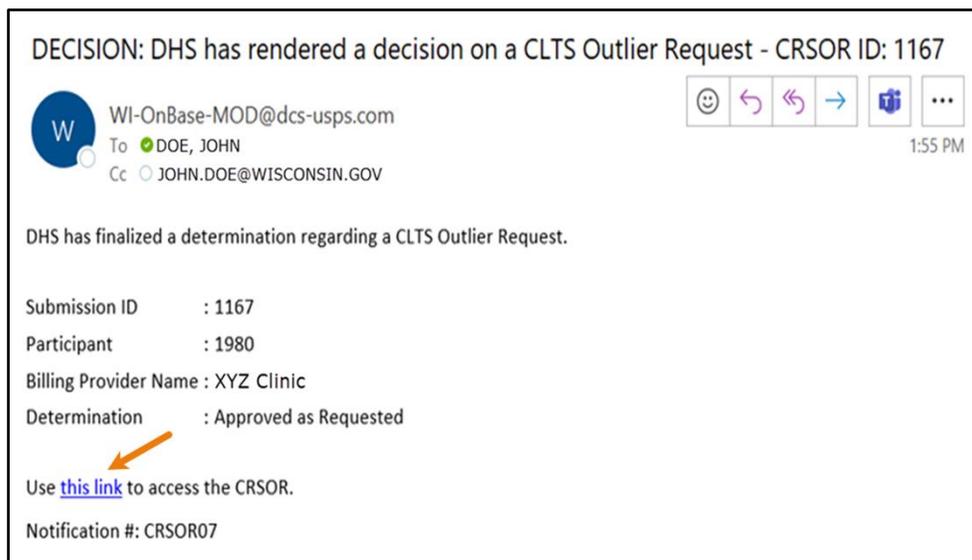
# 11 Final Determination on a Children's Long-Term Support Rate Setting Outlier Request

DHS will make one of three final determinations on a CRSOR:

- Approved as requested.
- Approved with modified rate.
- Denied.

Finalizing a determination removes the CRSOR from the workflow. The CRSOR is reclassified in OnBase as a Completed CRSOR and separated from the CRSORs still under determination. This also generates a CRSOR07 email notification which is sent to the Submitter, Approver, and CC addressees indicating a final determination has been rendered by DHS.

1. Click the link in the email notification to access the completed CRSOR.



**Figure 41** DHS Final Determination Email Sent to Submitter, Approver, and CC Email Addressees

- Go through the authentication and login process detailed in the [Accessing the Children’s Long-Term Support Rate Setting Outlier Request Processing Application](#) chapter.

The Completed CRSOR will be displayed. Note: All fields are read-only and action buttons are disabled.

**CLTS Rate Setting Outlier Request (CRSOR)**

County\* BROWN Administrative Support Organization\* N/A Submission ID 1184 Submission Date 06/13/2023

**Participant Information**

Participant MCI\* 1234567890 Participant First Name\* IMA Participant Last Name\* PARTICIPANT Participant DOB\* 08/09/1978

Clear Participant

**County Waiver Agency Information**

County Waiver Agency Name\* BROWN CO HUMAN SERVICES DEPT Submitter Name\* John Doe

Submitter Email\* jdoe@gmail.com Submitter Phone Number\* (608) 444-4444

Approver Name\* Jane Doe Approver Email\* janedoe@gmail.com

CC Email Address (separate each address with a comma) JOHN.DOE@WISCONSIN.GOV

**CLTS Outlier Request**

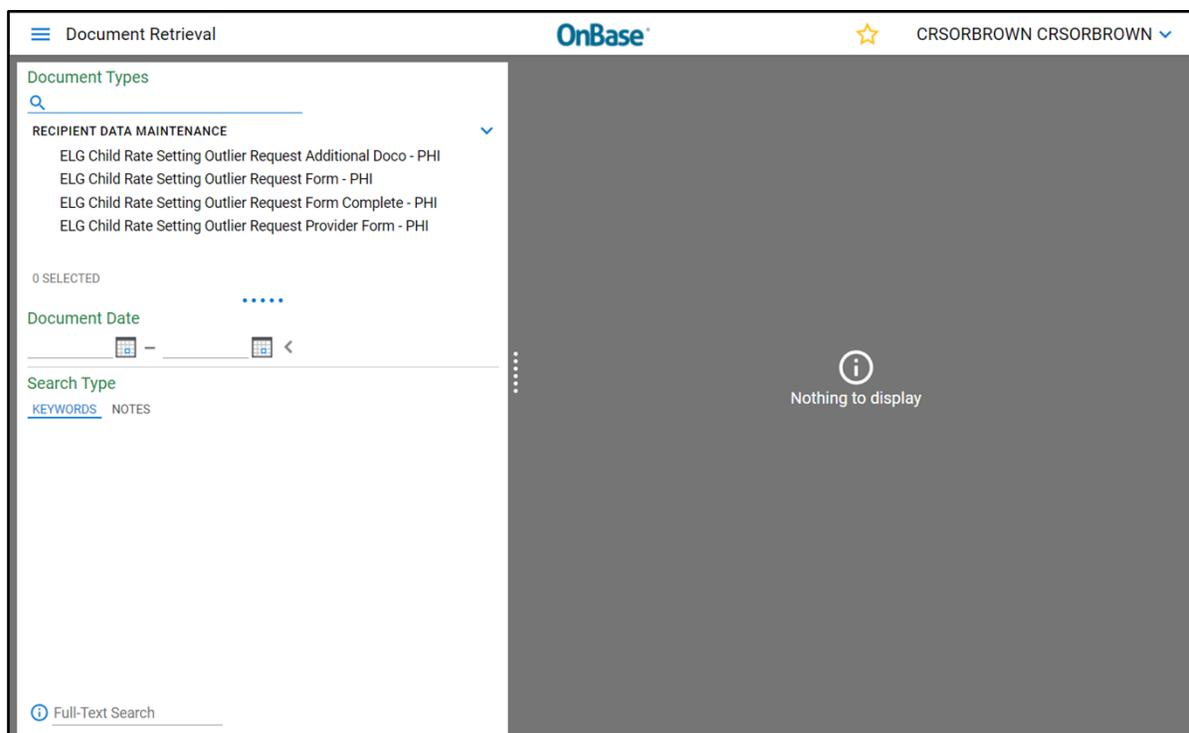
CWA Section	DHS Section
Service Category*	Review Determination
Federal Procedure Code*	

Figure 42 Completed CRSOR

# 12 Finding and Viewing Completed Children's Long-Term Support Rate Setting Outlier Requests

1. To view Completed CRSORs without using email links, log in to OnBase via the Portal following the steps from the [Accessing the Children's Long-Term Support Rate Setting Outlier Request Processing Application](#) chapter of this user guide.

The OnBase Document Retrieval screen will be displayed.

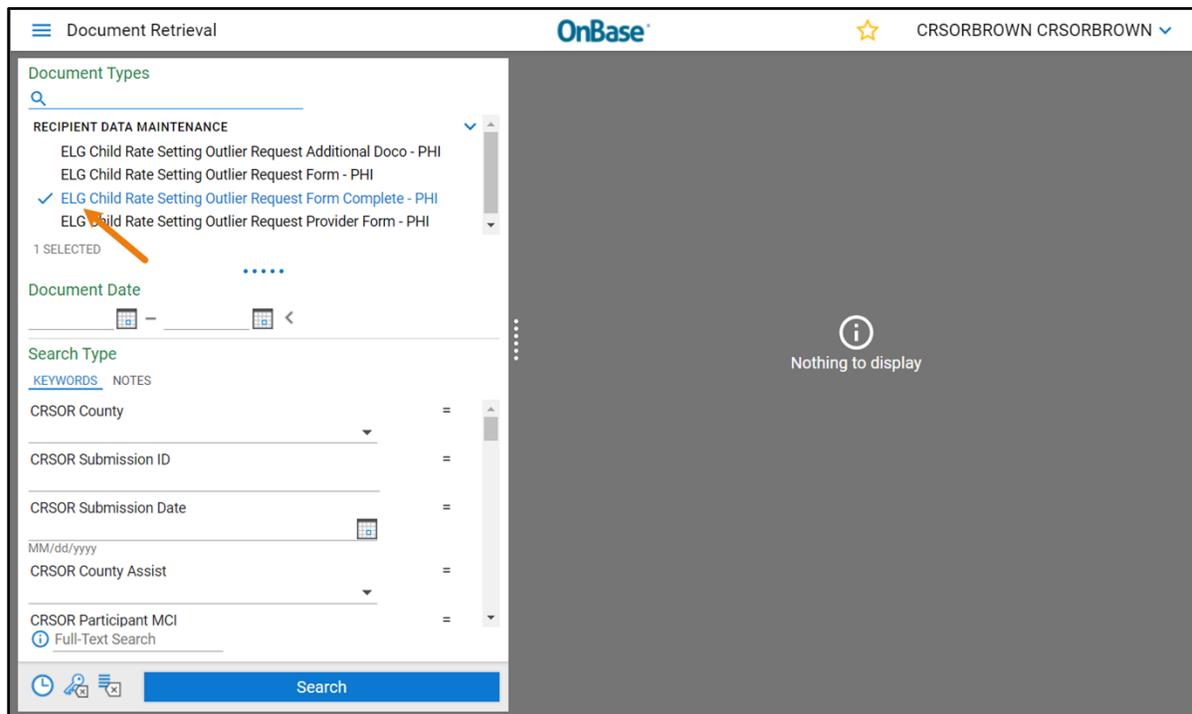


**Figure 43** OnBase Document Retrieval Screen—Default View

The CRSOR document types are as follows:

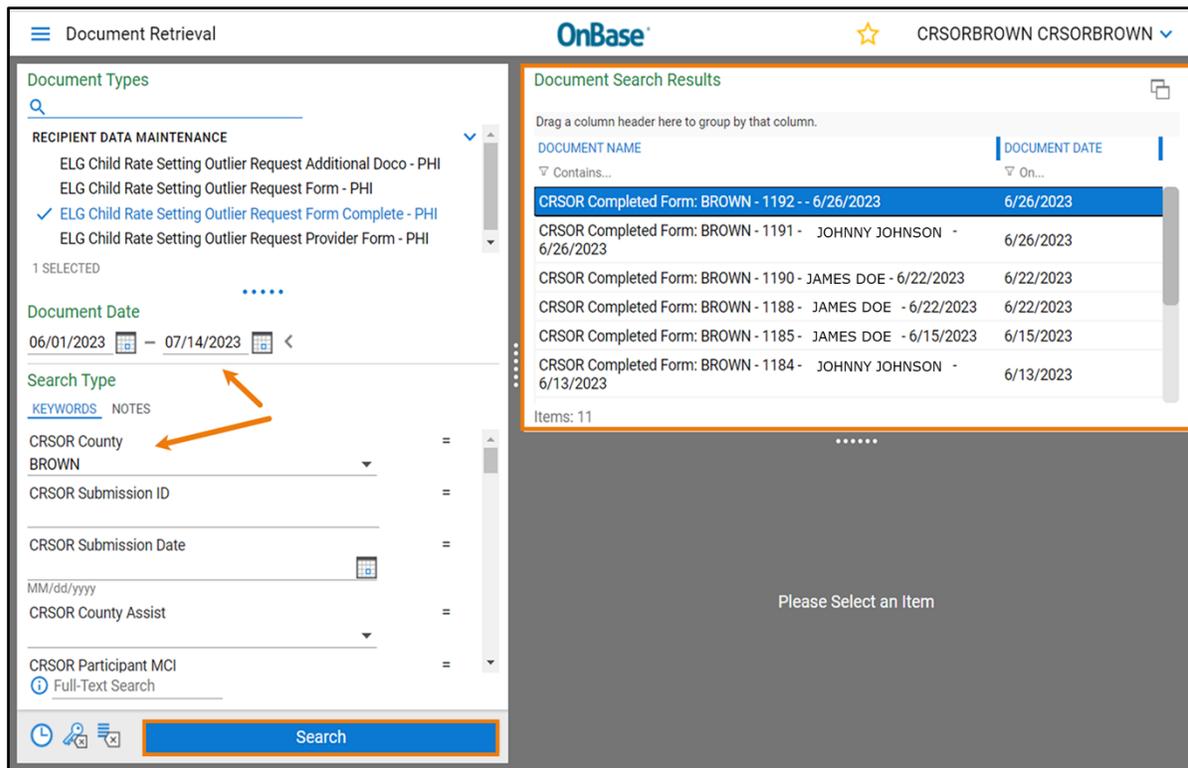
- ELG Child Rate Setting Outlier Request Additional Doco—PHI are documents attached to CRSORs other than the CLTS Provider Cost-Based Outlier form, F-02538A.
- ELG Child Rate Setting Outlier Request Form—PHI are CRSORs that are in progress.
- ELG Child Rate Setting Outlier Request Form Complete—PHI are CRSORs that have been finalized.

- ELG Child Rate Setting Outlier Request Provider Form—PHI are CLTS Provider Cost-Based Outlier forms, F-02538A, attached to CRSORs.
2. Select the document type. Keywords will be listed under the **Search Type** section to help restrict search results. Use the scroll bar to see all of the available keywords. Note: The Keywords have Boolean operators (equal to, greater than, less than, etc.). The user can enter a date range and/or keywords (County, Submission ID, Participant MCI, etc.). If the user is searching for a specific document, the Submission ID is the best keyword. This will return one CRSOR in the search results.



**Figure 44** OnBase Document Retrieval Screen—Select Document Type

3. Click **Search**. Results will be displayed under the Document Search Results pane. The search results in the example below show a query where a date range and county were selected.



**Figure 45** OnBase Document Retrieval Screen—Search Results

4. Double-click on a link in the search results and the CRSOR will be displayed in the viewer pane below the search results. Note: The CWA can contact DHS via email at [dhscltsrateoutlier@dhs.wisconsin.gov](mailto:dhscltsrateoutlier@dhs.wisconsin.gov) if they believe an error was made during finalization of the CRSOR. If DHS determines that the CRSOR was finalized in error, DHS can pull the CRSOR out of its completed status and the CRSOR will go through the final determination process again. This will result in another CRSOR07 email.

The screenshot displays the OnBase Document Retrieval interface. On the left, the 'Document Types' sidebar shows 'RECIPIENT DATA MAINTENANCE' with several document types, one of which is selected. Below this, 'Document Date' is set to 06/01/2023 - 07/14/2023, and 'Search Type' is set to 'KEYWORDS'. The 'CRSOR County' is set to 'BROWN'. A 'Search' button is at the bottom of the sidebar.

The main area shows 'Document Search Results' with a table of results. An orange arrow points to the first row, which is highlighted. The table has columns for 'DOCUMENT NAME' and 'DOCUMENT DATE'. Below the table, it indicates 'Items: 11'.

The detailed view for the selected document, 'CLTS Rate Setting Outlier Request (CRSOR)', shows the following information:

County *	Administrative Support	Submission ID	Submission Date
BROWN	Support	1192	06/26/2023

Below this, the 'Participant Information' section is visible:

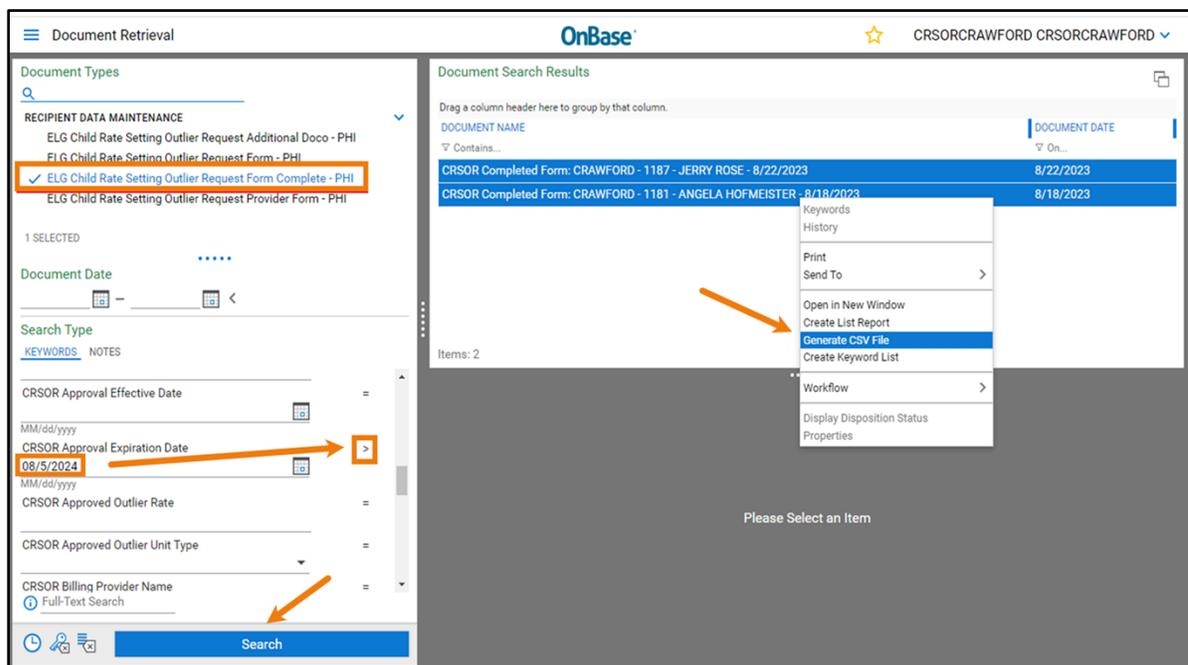
Participant MCI *	Participant First Name *	Participant Last Name *	Participant DOB *
01234567890			

Figure 46 OnBase Document Retrieval Screen—Completed CRSOR

# 13 Searching for Children’s Long-Term Support Rate Setting Outlier Requests Approaching Their Expiration Date

Users can search for CRSORs that are approaching their expiration date so they can submit new requests by using the following steps.

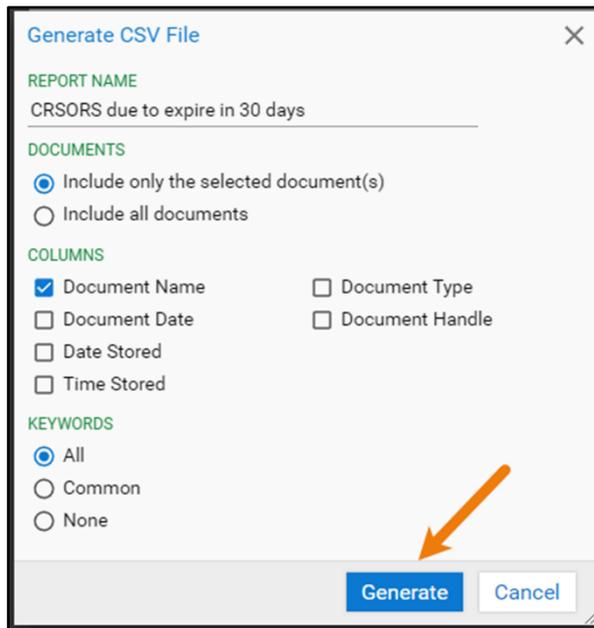
1. From the OnBase Document Retrieval screen, select the **ELG Child Rate Setting Outlier Request Form Complete—PHI** document type.
2. Input a date in the **CRSOR Approval Expiration Date** keyword field and change the Boolean operator symbol to greater than (>).



**Figure 47** Document Retrieval Screen

3. Click **Search**. Completed CRSORs meeting the search criteria will be listed in the Document Search Results pane.
4. Highlight the results, right-click, and select **Generate CSV File** from the drop-down menu.

A pop-up box will appear allowing the user to make more choices. Enter a name for the report.



**Generate CSV File**

**REPORT NAME**  
CRSORS due to expire in 30 days

**DOCUMENTS**  
 Include only the selected document(s)  
 Include all documents

**COLUMNS**  
 Document Name  
 Document Date  
 Date Stored  
 Time Stored  
 Document Type  
 Document Handle

**KEYWORDS**  
 All  
 Common  
 None

**Generate** **Cancel**

**Figure 48** Generate CSV File Pop-up Box

5. Click **Generate**. A file in CSV format will download to the Downloads folder.

6. Navigate to the Downloads folder and double-click the file to open it. Note: The columns may need to be expanded to view all of the data, but the data should be separated correctly by cell. Column R is the Approval Expiration Date. Use the dates in that column to identify and remove rows that are not of interest (too far in the future).

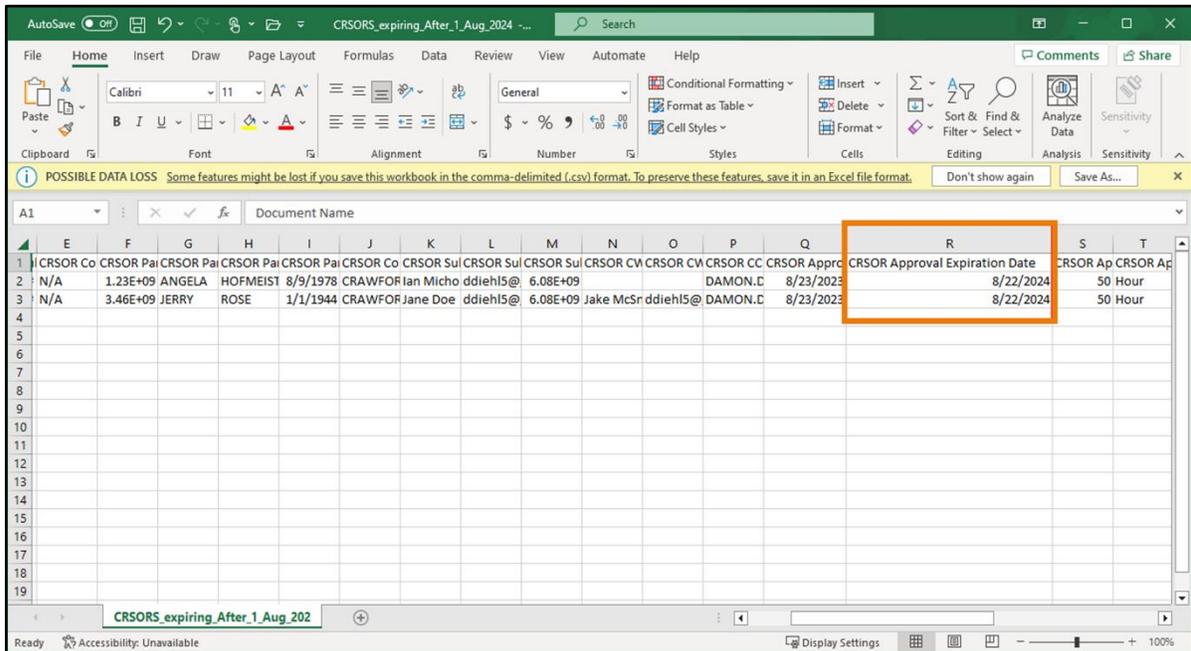


Figure 49 CSV Formatted File

7. Use the **Save As...** button to save the file to its proper location.

# 14 Appendix: 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 Administrator. 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 Administrator. 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.