

Secure ForwardHealth Portal Accounts

Steps for Establishing an Account

There are three basic steps for establishing a secure ForwardHealth Portal account:

1. Obtain a PIN from ForwardHealth. The PIN is a unique, nine-digit number assigned by ForwardHealth for the sole purpose of allowing a provider (or designee) to establish a Portal account. It is used in conjunction with the login ID. Once the Portal account is established, the provider or designee will be prompted to create a username and password for the account, which will subsequently be used to log in to the Portal.

To obtain a PIN, follow these steps:

- a) Go to the Portal home page at www.wisconsin.gov/.
- b) Click on the Providers link or button.
- c) Click the Request Portal Access link from the Quick Links box on the right side of the screen.
- d) Enter the requested information.
- e) Click Submit.

Note: Once the Portal Access Request is successfully completed, ForwardHealth will send a letter containing the PIN.

2. After receiving the PIN letter from ForwardHealth, select an individual to be the Portal administrator.
3. The Portal administrator will then log in and create a username and password.

Note: The Portal administrator may manage the Portal account or set up clerks to assist. Each clerk will have his or her own login (username/password).

Information About Access to Accounts

- Clerk access can be limited to certain Portal functionality through assignment of roles (e.g., member enrollment verification, claims, prior authorization) by the Portal Administrator.
- Other accounts may be added to the existing Portal account through the Add Organization functionality. This is helpful when one Portal administrator is responsible for multiple **billing** providers. This allows the Portal administrator to use one login to access various accounts. (*Note:* The licensed supervisor overseeing the member's plan of care is the billing provider.)
- Clerks may also be granted access to multiple accounts. Clerk roles need to be established for each account he or she has access to.

Each Portal administrator and every clerk has a Portal profile (username, password, first name, last name, phone number, etc.). If someone is becoming a clerk for the first time, the Portal administrator needs to initiate a profile for that clerk. However, if a clerk already has a profile, the Portal administrator should select the existing profile instead of creating a new one. This allows any one clerk to use one login to access various accounts.

If someone has a profile as a Portal administrator but also needs to be a clerk for a different Portal account, the Portal administrator of that other Portal account will need to initiate a clerk profile. This is the only situation where one person is required to have two login credentials—one as a Portal administrator and one as a clerk. This might happen if a behavioral treatment therapist or technician established his or her own Portal account to manage his or her demographics but then is needed as a clerk for the supervisor’s Portal account.

For more detailed instructions, providers should access the Account User Guide.

The screenshot shows the ForwardHealth interChange Provider interface. At the top, there is a navigation bar with links for 'wisconsin.gov home', 'state agencies', 'subject directory', and 'department of health services'. The main header features the 'ForwardHealth Wisconsin serving you' logo and the 'interChange Provider' title. A welcome message reads 'Welcome Training Provider » January 20, 2016 3:21 PM' with a 'Logout' link. A horizontal menu contains various options: Home, Search, Providers, Enrollment, Claims, Prior Authorization, Remittance Advices, Trade Files, HealthCheck, Max Fee Home, Account (highlighted in red), Contact Information, Online Handbooks, and Site Map. Below the menu, a status bar indicates the user is logged in with NPI: 777777773, Taxonomy Number: 103K00000X, Zip Code: 53711 - 1900, and Financial Payer: Medicaid. A search box is located to the right. The main content area is titled 'Account Home' and includes a brief description of account management capabilities. A section titled 'What would you like to do?' lists several actions: Maintenance, Messages, Change Password, Clerk Maintenance, Switch Organization, Add Organization, and View the Account User Guide. At the bottom, there are links for 'About', 'Contact', 'Disclaimer', and 'Privacy Notice', followed by the text 'Wisconsin Department of Health Services' and 'Training Train_WIPortal_M520'.