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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.
To establish a Provider Portal account, providers will need a Personal Identification Number (PIN). 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/](https://www.forwardhealth.wi.gov/).

2. Click **Providers**.

   The public page for the Provider area 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.
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.
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 provider’s 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 provider’s SSN or 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 some of the following reasons:

- No provider agreement on file. Call Provider Services at (800) 947-9627 for the agreement.
- The SSN or TIN number is incorrect. Verify the number and enter the correct number.
- A PIN was 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 (866) 908-1363 Monday through Friday between 8:30 a.m. and 4:30 p.m.

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.
August 22, 2011

21575X
GENERAL CLINIC
92 E 88TH ST STE 300
JOHN SMITH
MADISON, WI 53703-0000

Dear Provider:

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

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

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

To create your secure Provider account:

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

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

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

F-13512 (08/08)

Wisconsin.gov

PIN Letter
3 Set Up an Account

After receiving a PIN letter, users may set up an account on the ForwardHealth 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.

For information about adding a new organization to a current account, refer to Section 7 Add Organization.

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 area 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 to which the clerk administrative account has access and can delete and manage clerk accounts under his or her purview.

3.2 Logging in for First Time

1. After you receive the PIN letter, access the ForwardHealth Portal at [https://www.forwardhealth.wi.gov/](https://www.forwardhealth.wi.gov/).
2. Click **Login**.

   The ForwardHealth Portal Login box will be displayed.

   ![ForwardHealth Portal Login](image)

   **ForwardHealth Portal Login**

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

      The Account Setup page will be displayed.
4. Enter the Login ID and PIN listed in your PIN letter.

   For security purposes, the PIN letter will contain only four 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 from 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 six-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 eight-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 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 eight characters and cannot contain special characters (except for spaces).
   - The security answers must have at least three 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. Check the agreement checkbox.
9. Click **Submit**.

Your secure Provider page will be displayed.

![Secure Provider Page](image)

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

### 3.3 Reset Password


2. Click **Login**.

The ForwardHealth Portal Login box will be displayed.

![ForwardHealth Portal Login](image)
3. Click **Forgot your password?**

   The Reset Password page will be displayed.

   ![Reset Password Page](image)

   **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](image)

   **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

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.
6. Click Account on the main menu at the top of the page.
   The Account Home page will be displayed.
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 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 to which you will readily know the answers but that are not common knowledge.

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

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

8. Make applicable changes.

9. Click Submit.

A confirmation message will be displayed.

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](image)

   **Change Password Page**

2. Enter your current password.
3. Enter your new password (twice for confirmation).
   The password must be between eight-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 user name, contact first name, contact last name, or the security answers.

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

4. Click **Submit**.
   A confirmation message will be displayed.

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

   **Confirmation Message**
   If you receive an error message, correct the error(s) and click **Submit** again.
6 Clerk Maintenance

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

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

   The Clerk Maintenance page will be displayed.

   ![Clerk Maintenance Page](image)

   **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.

- If you are adding a new clerk account, complete the following steps:
  
  a. Enter a user name.
  
  b. The user name must be between six-20 characters and can only contain letters and numbers. The user name is not case-sensitive.
  
  c. Enter the new clerk’s contact first name and contact last name.
  
  d. Enter the new clerk’s telephone number (and extension, if applicable).
  
  e. Enter the new clerk’s e-mail (twice for confirmation).
  
  f. Enter an initial password for the new clerk (twice for confirmation).

  The password must be between eight-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 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.
  b. The User Name Search box will be displayed.
  c. Enter the clerk account’s username, first name, or last name.
  d. Click **Search**.
  e. The “Search Results” section will be displayed.
  f. Click the row of the applicable clerk account.
  g. The User Name Search box will close and the clerk account information will be auto-populated on the 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 box.

   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](image)

   **Clerk Roles Section with Available Roles**

   2. Click >.

   **Note:** 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](image)

   **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, click the row containing the clerk’s name.

Clerk Maintenance Page
The fields on the page will auto-populate with the clerk’s information.
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 the roles you want to remove.
3. Click <.

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

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

4. Click **Submit**.

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

**The following messages were generated:**

- Clerk Maintenance - Save was Successful

**Confirmation Message**

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

### 6.4 Assign a Clerk Administrator

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

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

   The Reset Password page will be displayed.

   ![Reset Password Page](image)

   **Reset Password Page**

3. Enter the new password (twice for confirmation).
The password must be between eight-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 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.

   ![Confirmation Message](image)

**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](image)

**Clerk Maintenance Page**

The fields on the page will auto-populate with the clerk’s information.
2. Click **Remove Clerk** to initiate the record deletion.

A dialog box confirming the deletion will be displayed.

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](image1)

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](image2)

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.
6. Enter the 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. For more information, refer to *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. For information about switching to the added organization, refer to Section 8 Switch Organization.
8 Switch Organization

Under the Switch Organization function:

- Users with administrative and clerk administrative accounts may assign roles 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 applicable 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 to which you switched 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](image)

**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.

   Note: If there is only one message, the message and “Message” section will be displayed.

2. Click the applicable message.
   The “Message” section will be displayed at the bottom of the page.
Message Section

3. To delete a message:
   a. Check the Remove box next to the message.
Messages Page

b. Click **Remove**.

The message will be deleted from the Messages page.