

Affected Programs: BadgerCare Plus, Medicaid, Wisconsin Chronic Disease Program, Wisconsin Well Woman Program

To: All Providers, HMOs and Other Managed Care Programs

Important Information for ForwardHealth Portal Administrators

This *ForwardHealth Update* informs providers, trading partners, and managed care organizations about the role and responsibilities of the Portal Administrator; including information on setting up and maintaining Portal accounts.

ForwardHealth interChange

In November 2008, the Department of Health Services (DHS) will implement ForwardHealth interChange, which replaces Wisconsin's existing Medicaid Management Information System (MMIS). ForwardHealth interChange will be supported as part of the State's new fiscal agent contract with EDS. With ForwardHealth interChange, providers and trading partners will have more ways to verify member enrollment and submit electronic claims, adjustments, and prior authorization (PA) requests through the secure ForwardHealth Portal. Refer to the March 2008 *ForwardHealth Update* (2008-24), titled "Introducing ForwardHealth interChange, a New Web-Based Information System for State Health Care Programs," for an overview of the implementation and a more detailed outline of the many business process enhancements and added benefits the new system and fiscal agent contract will provide.

This *Update* explains the role and responsibilities of the Portal administrator, including information on setting up and maintaining Portal accounts.

ForwardHealth Portal

The DHS is excited to bring the Portal to the Wisconsin provider community as it allows providers, managed care organizations (MCOs), partners, and trading partners greater access to, and improved services from, ForwardHealth.

A limited version of the ForwardHealth Portal is currently available at www.forwardhealth.wi.gov/. This limited version of the Portal allows providers, trading partners, and MCOs to establish their accounts and perform functions necessary to ensure that they are ready for the ForwardHealth interChange implementation in November.

The fully functional Portal will be launched in November and will include the following areas:

- Providers.
- Trading Partners.
- Managed Care Organizations.
- Partners.

Members have a separate Web site, www.forwardhealth.wi.gov/members/, to access general health care program information and apply for benefits online.

Providers and the Portal

Some of the functions the Portal will offer providers include:

- Electronic claims submission.
- Claim adjustments and corrections.
- Submitting PA and amendment requests.
- Enrollment verification.
- Designating a trading partner to receive 835 Claim Payment/Advice Transactions (835).
- Viewable Remittance Advices.
- Online certification.

Trading Partners and the Portal

A trading partner is defined as a covered entity that exchanges electronic health care transactions as mandated by the Health Insurance Portability and Accountability Act of 1996 (HIPAA). Therefore, the DHS considers the following covered entities to be its trading partners:

- Billing providers who exchange electronic transactions directly with the DHS.
- Billing services and clearinghouses that exchange electronic transactions directly with the DHS.

The following information is available on the Portal for trading partners:

- Trading partner testing packets.
- Trading Partner Profile submission.
- Provider Electronic Solutions software and upgrade information.
- Electronic Data Interchange companion documents.

Trading partners can exchange electronic transactions with ForwardHealth in the secure Trading Partner area of the Portal.

Managed Care Organizations and the Portal

The following information is available to MCOs on the Portal:

- General reports and profiles.
- Quality reports.

- Historical data.
- Enrollment verification.
- Enrollment statistic reports.
- Provider and member contacts.
- Capitation payment listing by MCO (834 Benefit Enrollment and Maintenance [834] transactions).
- Monthly MCO initial and final enrollment rosters (820 Payroll Deducted and Other Group Premium Payment for Insurance Products [820] transactions).

Portal Administrators (Providers, Managed Care Organizations, and Trading Partners)

The new Portal functionality is available to providers, trading partners, MCOs, and partners in addition to the methods they currently use to do business with ForwardHealth. Many of the features noted above are secure and can only be accessed with an authorized Portal account. Portal administrators are responsible for requesting, creating, and managing accounts to access these features for their organization.

There must be one administrator assigned for each Portal account. The administrator is ultimately responsible for setting up and managing the Portal account and all users established for that account. The responsibilities of the Portal administrator include:

- Ensuring the security and integrity of all user accounts (clerk administrators and clerks) created and associated with their Portal account.
- Ensuring clerks or clerk administrators are given the appropriate authorizations they need to perform their functions for the provider, trading partner, or MCO.
- Ensuring that clerks or clerk administrator accounts are removed/deleted promptly when the user leaves the organization.
- Ensuring that the transactions submitted are valid and recognized by ForwardHealth.
- Ensuring that all users they establish know and follow the security and privacy guidelines as required by HIPAA. As Portal administrators

establish their ForwardHealth Portal account and create accounts for others to access private information, administrators are reminded that all users must comply with HIPAA. The HIPAA privacy and security rules require that the confidentiality, integrity, and availability of protected health information (PHI) are maintained at all times. The HIPAA Privacy Rule provides guidelines governing the disclosure of PHI. The HIPAA Security Rule delineates the security measures to be implemented for the protection of electronic PHI. If Portal administrators have any questions concerning the protection of PHI, visit the DHS Web site at www.dhs.wisconsin.gov/ for additional information.

Portal administrators have access to all secure functions for their Portal account.

Ensuring Administrators Are Ready to Use the Portal

Portal administrators are required to complete the following steps in order to use the new ForwardHealth Portal and to gain secure access for themselves and others in their organizations:

1. Request a Portal account (providers and trading partners only).
2. Establish an administrator account. (providers, trading partners, and MCOs)
3. Set up clerk administrators and clerks with the appropriate authorizations (providers, trading partners, and MCOs).
4. Complete any additional steps required to ensure their organization is ready for the November implementation (providers, trading partners, and MCOs). A checklist for each is listed at the end of this *Update*.

Request a Portal Account

Providers can begin requesting Portal accounts at www.forwardhealth.wi.gov/. Refer to the July 2008 *Update* (2008-124), titled “Establishing a Provider

Account on the ForwardHealth Portal,” for information regarding provider accounts. Provider Portal accounts are based on a provider’s ForwardHealth certification. Providers may have several ForwardHealth certifications and may need to request several provider Portal accounts. Providers should refer to a Web cast on Portal Administrators, located at www.dhs.wisconsin.gov/forwardhealth/ in the training section, for advice on how to organize their Portal accounts. Providers may also view a Portable Document Format version of the slides of this Web cast on the new ForwardHealth Portal at www.forwardhealth.wi.gov/ in the “Log in to Secure Site” box. This Web cast is especially important in instances where a provider has multiple ForwardHealth certifications because it describes how a single administrator can manage the Portal accounts for multiple certifications.

Managed care organizations can begin establishing Portal accounts at www.forwardhealth.wi.gov/. Refer to the July 2008 *Update* (2008-97), titled “Establishing a Managed Care Organization Account on the ForwardHealth Portal and Designating a Trading Partner to Receive the 820 Payroll Deducted and Other Group Premium Payment for Insurance Products and the 834 Benefit Enrollment and Maintenance Transactions,” for information regarding MCO accounts. Managed Care Organizations do not have to request a Portal account — they will automatically receive a letter with login information for the MCO Portal. Managed Care Organization personal identification number (PIN) letters were mailed on August 21, 2008, to all existing MCOs.

Trading partners may request a Portal account by completing a new Trading Partner Profile at www.forwardhealth.wi.gov/.

Providers, MCOs, and trading partners should reference the Account User’s Guide located on the “Account” page for instructions on setting up accounts.

Establish an Administrator Account

Regardless of how a Portal account is requested, all Portal accounts (except Partners and Members) require an administrator account. The administrator is a selected individual who has overall responsibility for management of the account. Therefore, he or she has complete access to all functions within the specific secure area of his or her Portal (Provider, MCO, trading partner) and are permitted to add, remove, and manage other individual roles.

Setting Up Clerk Administrators and Clerks

Once a Portal administrator account is established, the Portal administrator may set up clerk administrators and clerks as they choose for their accounts.

Portal Clerk Administrators

A Portal administrator may choose to delegate some of the authority and responsibility for setting up and managing the users within their Portal account. If so, the Portal administrator may establish a clerk administrator. An administrator or clerk administrator can create, modify, manage, and remove clerks for a Portal account. When a clerk is created, the administrator or clerk administrator must grant permissions to the clerks to ensure they have the appropriate access to the functions they will perform. A clerk administrator can only grant permissions that they themselves have. For example, if an administrator gives a clerk administrator permission only for enrollment verification, then the clerk administrator can only establish clerks with enrollment verification permissions.

Even if a Portal administrator chooses to create a clerk administrator and delegate the ability to add, modify, and remove users from the account, the Portal administrator is still responsible for ensuring the integrity and security of the Portal account.

Portal Clerks

The administrator (or the clerk administrator if the administrator has granted them authorization) may set up clerks within their Portal account. Clerks may be assigned one or many roles (i.e., claims, PA, enrollment verification). Clerks do not have the ability to establish, modify, or remove other accounts.

Once a clerk account is set up, the clerk account does not have to be established again for a separate Portal account. Clerks can easily be assigned a role for different Portal accounts (i.e., different ForwardHealth certifications). To perform work under a different Portal account for which they have been granted authorization, a clerk can use the “switch org” function and toggle between the Portal accounts to which they have access. Clerks may be granted different authorization in each Portal account (i.e., they may do enrollment verification for one Portal Account, and HealthCheck inquiries for another).

Portal Readiness Activities

There are specific activities that providers, MCOs, and trading partners must complete in order to ensure that they are ready to do business with ForwardHealth in November using the Portal. These functions are critical for ensuring that there is no disruption in business.

Provider Readiness Checklist

Providers should accomplish the following steps prior to implementation of the Portal in October:

- Complete provider agreements (this only applies to BadgerCare Plus and Medicaid providers).
- Request Portal access and receive a PIN.
- Designate a Portal administrator.
- Set up Portal account(s) (adding clerk administrators and clerks as needed).
- Complete their 835 designation (if applicable).

Managed Care Organization Readiness Checklist

Managed care organizations should accomplish the following steps prior to implementation of the Portal in November:

- Designate a Portal administrator.
- Use the PIN sent by ForwardHealth along with the MCO's login ID to establish a Portal account.
- Set up a Portal account (adding clerk administrators and clerks as needed).
- Complete 820/834 designation (if applicable).

Trading Partner Readiness Checklist

Trading partners (including MCO trading partners) should accomplish the following steps prior to implementation of the Portal in November:

- Complete a new Trading Partner Profile and receive a PIN.
- Designate a Portal administrator.

- Set up Portal account (adding clerk administrators and clerks as needed).
- Conduct testing of electronic transactions.

The *ForwardHealth Update* is the first source of program policy and billing information for providers.

Wisconsin Medicaid, BadgerCare Plus, SeniorCare, and Wisconsin Chronic Disease Program are administered by the Division of Health Care Access and Accountability, Wisconsin Department of Health Services (DHS). Wisconsin Well Woman Program is administered by the Division of Public Health, Wisconsin DHS.

For questions, call Provider Services at (800) 947-9627 or visit our Web site at dhs.wisconsin.gov/forwardhealth/.

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