

Affected Programs: BadgerCare Plus, Medicaid
To: All State-Contracted Managed Care Organizations

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

This *ForwardHealth Update* outlines the process of 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. Managed care organizations will be able to set up an account beginning in August 2008.

Background Information

In October 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, managed care organizations (MCOs) and trading partners will have more ways to verify member enrollment, receive managed care reports, submit encounter data, and access HealthCheck information 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.

After implementation of ForwardHealth interChange, MCOs will receive all of their reports through their account on the ForwardHealth Portal. Managed care organizations are strongly encouraged to establish a Portal account to receive reports from ForwardHealth.

Creating a Managed Care Organization Account

On August 18, 2008, a letter will be sent to MCOs that contains a personal identification number (PIN) to use when establishing an account on the ForwardHealth Portal. The PIN is a unique, nine-digit number assigned by ForwardHealth for the sole purpose of allowing the MCO to establish a Portal account. It is used in conjunction with the MCO's Login ID. Once the Portal account is established, the MCO will be prompted to create a username and password for the account, which will subsequently be used to log in to the Portal.

Note: The MCO account is not the same as a trading partner account. Managed care organizations that have established a trading partner account must also establish an MCO account in August with the PIN they receive in the mail.

Each MCO will need to designate one individual as an administrative user; this user will establish the administrative account after the MCO receives the PIN. The administrative user is responsible for this MCO account and can maintain account information. The administrative user is able to add or remove clerks and assign roles to clerks that have been established. To establish an administrative account after receiving a PIN, the administrative user is required to follow these steps:

1. Go to the Portal at www.forwardhealth.wi.gov/.
2. Click on the “Managed Care Organization” link or button.
3. Click the “Logging in for the first time?” link.
4. Enter the Login ID. This number is the eight-digit Medicaid provider number for the MCO’s main service location ending in “00.”
5. Enter the PIN provided in the letter.
6. Click **Setup Account**.
7. At the Account Setup screen, enter the user’s information in the required fields.
8. Read the security agreement and click the checkbox to indicate agreement with its contents.
9. Click **Submit** when complete.

Once in the secure Managed Care Organization area of the Portal, the MCO may conduct business online with ForwardHealth via a secure connection. Managed care organizations may also perform the following administrative functions from the secure Managed Care Organization area of the Portal:

- Establish accounts and define access levels for clerks.
- Add other organizations to the account.
- Switch organizations.

A user’s guide containing detailed instructions for performing these functions can be found on the Portal.

Logging in to the Portal

Once an administrative user’s or other user’s account is set up, he or she may log in to the Managed Care Organization area of the Portal to conduct business. To log in, the user is required to click the Managed Care Organization link or button, then enter his or her username and password and click **Go** in the **Login to Secure Site** box on the right side of the screen.

Designating the 820 and 834 Transactions

Managed care organizations must designate a trading partner to receive the 820 Payroll Deducted and Other Group Premium Payment for Insurance Products (820) and the 834 Benefit Enrollment and Maintenance (834) transactions. If the MCO has a trading partner account on the Portal, the MCO can designate itself as the receiving trading partner. To designate a trading partner that has an established account with ForwardHealth, follow these instructions:

1. Log in to the secure Managed Care Organization area of the Portal.
2. Click on the “Designate 820/834 Receiver” link on the right-hand side of the home page.
3. Enter the trading partner’s identification number in the “Trading Partner ID” field (required). (The “Search” option allows the user to search a database of trading partners established with ForwardHealth for the correct identification number.)
4. The “Trading Partner Name” field will be automatically filled after the “Trading Partner ID” field is completed.
5. Click **Save**.

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:

- Managed care organizations that receive electronic transactions directly from the DHS.
- Billing services and clearinghouses that receive or exchange electronic transactions directly with the DHS on behalf of an MCO or a billing provider.

Testing the 820 and 834 Transactions

Managed care organizations that are also trading partners and have completed a trading partner profile are encouraged to test the 820 and 834 transactions. These files are posted in the Trading Partner area of the Portal every Friday afternoon so they will be available the Friday after the MCO has established a trading partner account.

For more information on completing the trading partner profile, MCOs should refer to the June 2008 trading partner letter, available on the ForwardHealth Web site at the following address, dhs.wisconsin.gov/ForwardHealth/trading_partner/pdfs/tpletter_01.pdf. For more information on testing the 820 and 834 transactions, MCOs should refer to the Managed Care Trading Partner Testing Packet, which is available on the Portal at www.forwardhealth.wi.gov/.

The companion documents for the 820 and 834 have been updated and are available on the Portal. The purpose of companion documents is to provide trading partners with a guide to communicate the specific information required to successfully exchange transactions electronically with ForwardHealth.

For More Information

For more information on establishing an account in the Portal or downloading testing materials, contact the EDI Helpdesk by telephone at (866) 416-4979 or by email at VEDSWIEDI@wisconsin.gov.

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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