ForwardHealth Provider Portal Remittance Advice

April 8, 2016

User Guide

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1 Introduction

A Remittance Advice (RA) provides important information about the processing of claims and adjustment requests as well as additional financial transactions, such as refunds or recoupment amounts withheld. ForwardHealth provides electronic RAs to providers through their secure ForwardHealth Portal accounts when at least one claim, adjustment request, or financial transaction is processed. An RA is generated regardless of how a claim or adjustment is submitted (electronically or on paper).

Remittance Advices are accessible to providers in a text (.txt) or comma-separated values (CSV) format via their secure Portal accounts.

2 Access the Remittance Advices Page

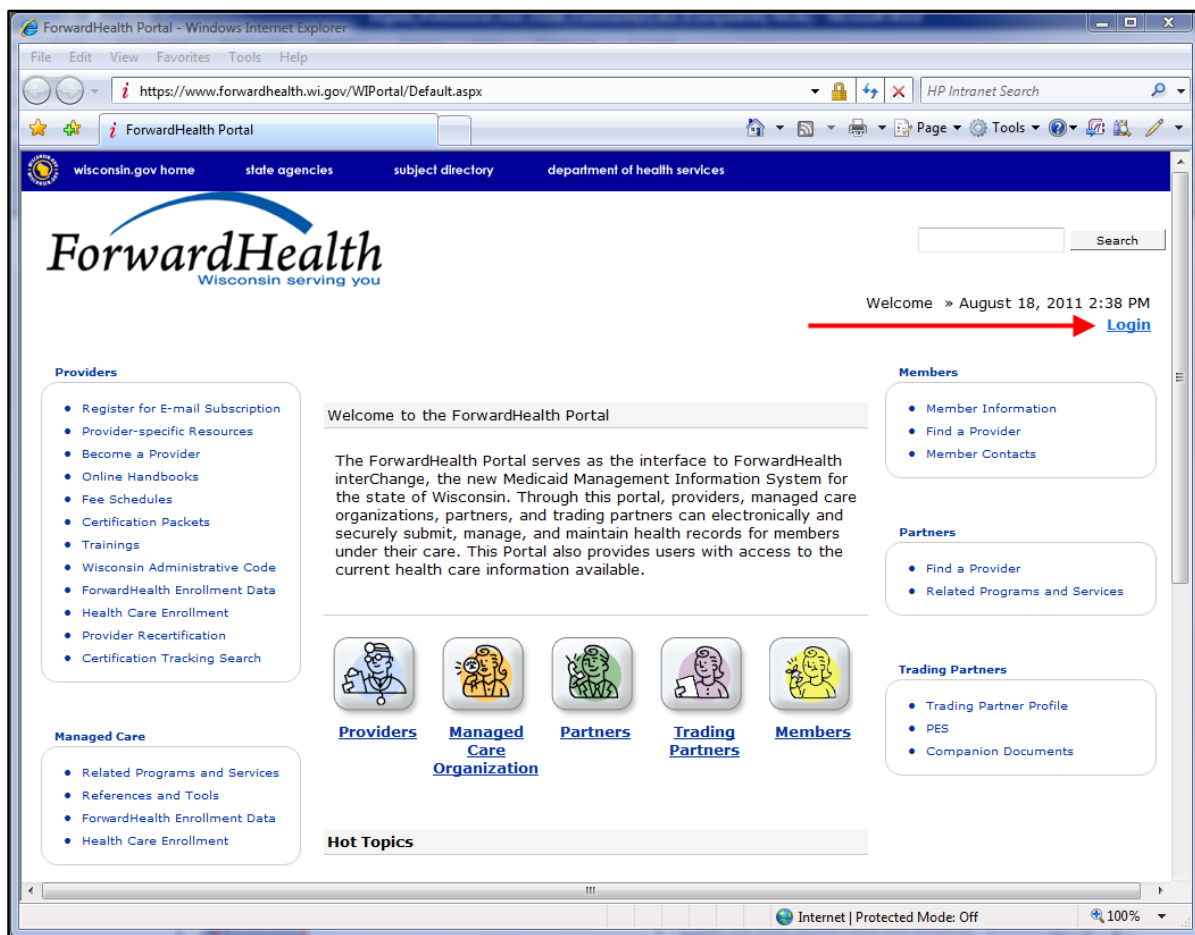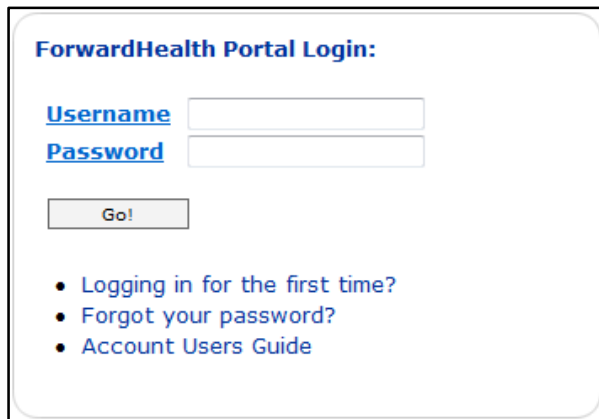1. Access the ForwardHealth Portal at https://www.forwardhealth.wi.gov/.

Figure 1 ForwardHealth Portal Page

2. Click **Login**. The ForwardHealth Portal Login box will be displayed.

Figure 2 ForwardHealth Portal Login

3. Enter your username.

4. Enter your password.

5. Click **Go!** The secure Provider page will be displayed.
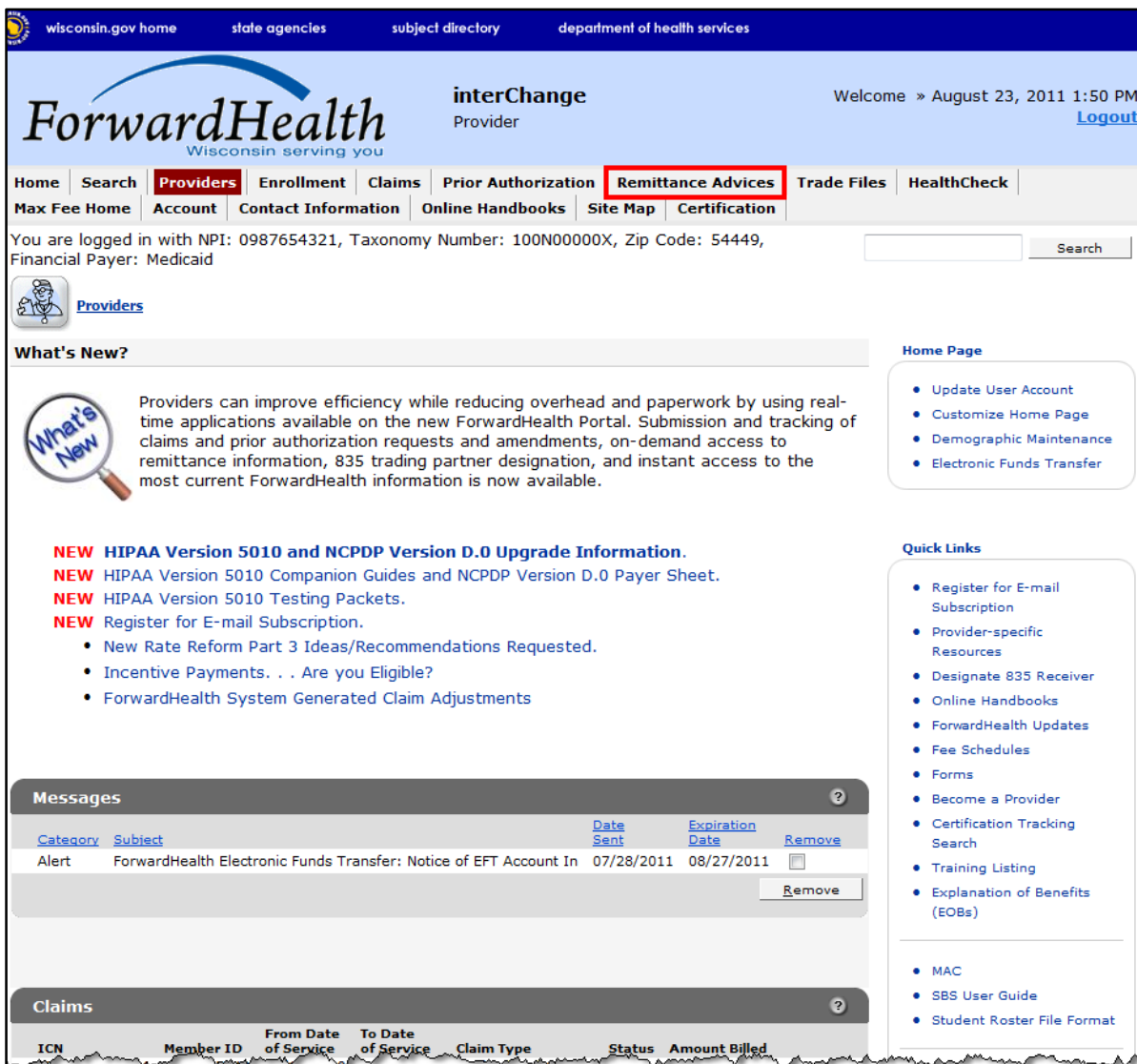
Figure 3 Secure Provider Page

6. Click **Remittance Advices** on the main menu at the top of the page. The Remittance Advices page will be displayed.

Note: The Remittance Advices option is displayed for administrative accounts or for clerk accounts that have been assigned the Remittance Advice role. For information about adding the Remittance Advice role to a clerk account, refer to the ForwardHealth Provider Portal Account User Guide, which is located on the Portal User Guides page of the Portal.

Remittance Advices

ForwardHealth offers providers and MCOs two different options for obtaining their remittance advices electronically. From this page, users will be able to select the electronic RA format that best suits their needs.

Text Report Format (.txt)

Use the following link to access remittance advices in text format. Users will be able to select which specific RA they would like to download or view. Text report formatted remittances are available for the past 121 days.

- Download or view remittance advices in a text (.txt) report format

Comma-Separated-Values Format (.csv)

Use the following links to access remittance advices in CSV format. Users will be able to select which specific RA they would like to download. Users will also be able to choose which sections of the RA they would like to include in the download file. A provider or MCOs last 10 remittance advices will be available in CSV format.

- Download remittance advices in a CSV (.csv) report format

- View the RA User Guide

- View the CSV file User Guide

- View EOB codes and descriptions

The official version of the remittance advices will continue to be maintained within the ForwardHealth databases.

Figure 4 Remittance Advices Page

The Remittance Advices page displays the following links:

- Download or view remittance advices in a text (.txt) report format — Allows users to view or download .txt copies of RAs from the past 121 days.

- Download remittance advices in a CSV (.csv) report format — Allows users to download their ten most recent RAs in a CSV format.

- View the RA User Guide — Allows users to access basic information about using RA functionality on the Portal.

- View the CSV file User Guide — Allows users to access basic information about using the CSV file containing their RA information. The CSV format is accepted by several computer software programs, including Microsoft® Office Excel and Microsoft® Office Access.

- View EOB codes and descriptions — Allows users to access a list of Explanation of Benefits (EOB) codes and descriptions. A list of all the EOB codes used for an RA will be

displayed at the end of the RA. In .txt files, the EOB codes and their descriptions will be listed. In CSV files, only the EOB codes will be listed.

Note: Users who change their Portal account password should not access their RAs for at least 30 minutes after the password change.

3 View Remittance Advices in Text Report Format

1. In the "Text Report Format (.txt)" section, click **Download or view remittance advices in a text (.txt) report format**.

Text Report Format (.txt)

Use the following link to access remittance advices in text format. Users will be able to select which specific RA they would like to download or view. Text report formatted remittances are available for the past 121 days.

- Download or view remittance advices in a text (.txt) report format
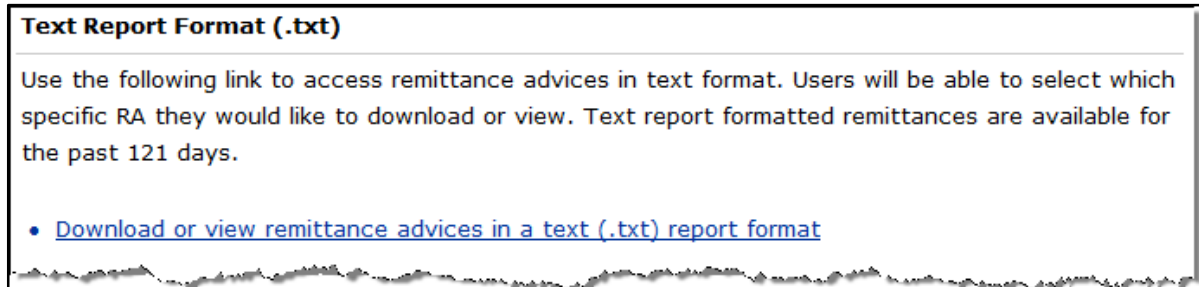
Figure 5 Text Report Format (.txt) Section

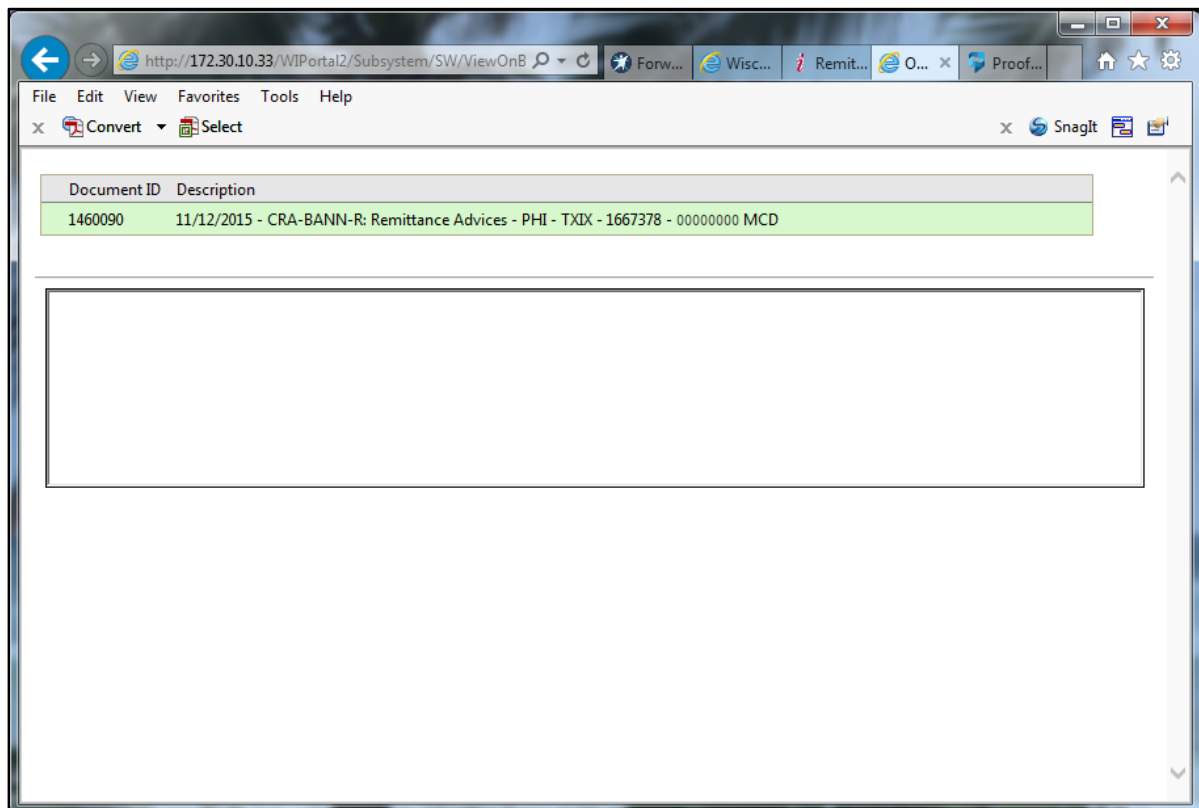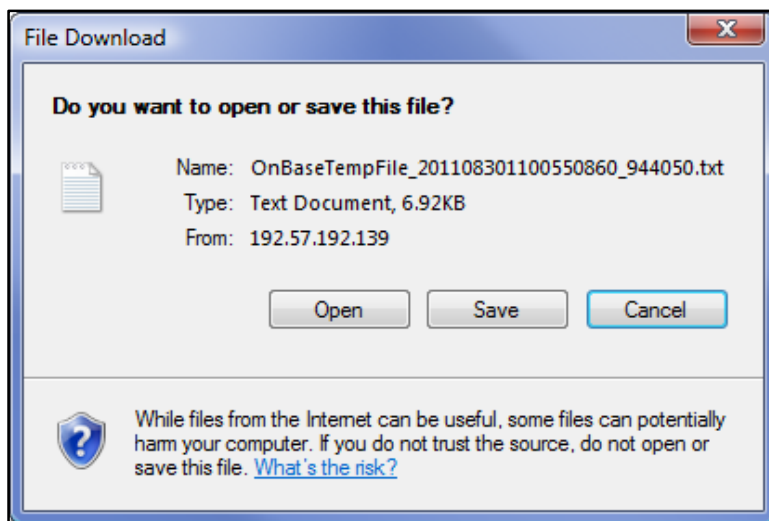The OnBase Document Viewer showing the most recent RAs for the logged in account will open in a separate window.

| Document ID	Description
1460090	11/12/2015 - CRA-BANN-R: Remittance Advices - PHI - TXIX - 1667378 - 00000000 MCD

Figure 6 OnBase Document Viewer

2. Click the RA you wish to view. A File Download window will be displayed.

Figure 7 File Download Window

3. Choose to either open or save the RA.

- Click **Open** to view the RA without saving. The RA text report will be displayed in a separate window. Refer to the example RA text report below.

- Click **Save** to save the RA for record-keeping purposes. A Save As window will be displayed.
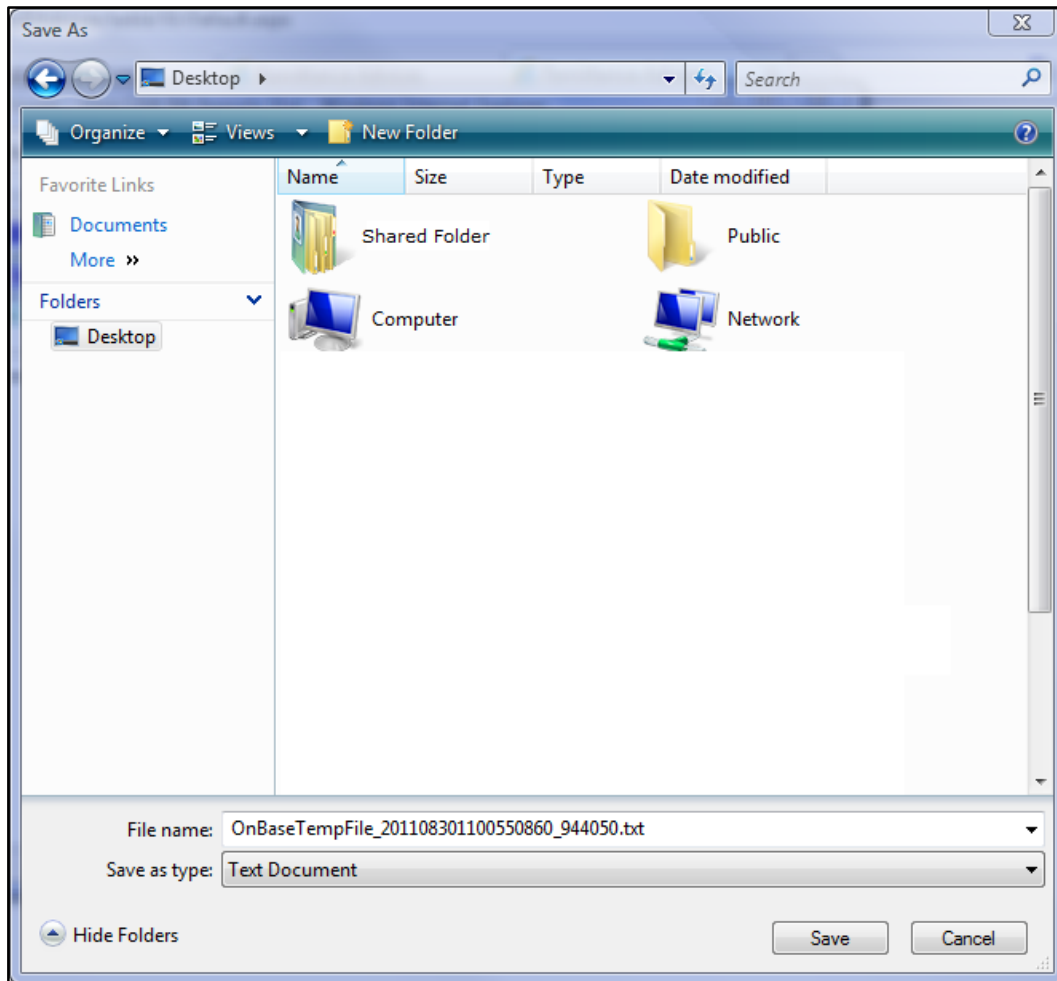
Figure 8 Save As Window

o   Choose a location on your computer or network to save the RA.

o   Click **Save**. The Download Complete window will be displayed.
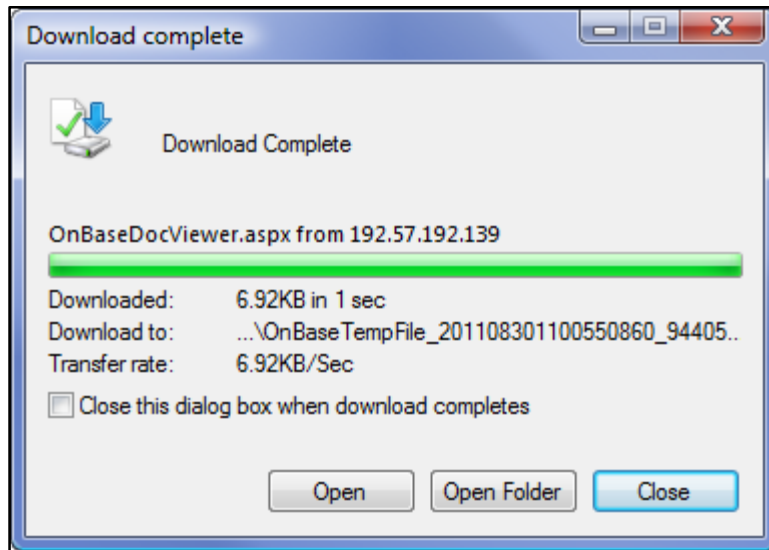

Figure 9 Download Complete Window

o   Click **Open**.

The RA text report will be displayed in a separate browser window.
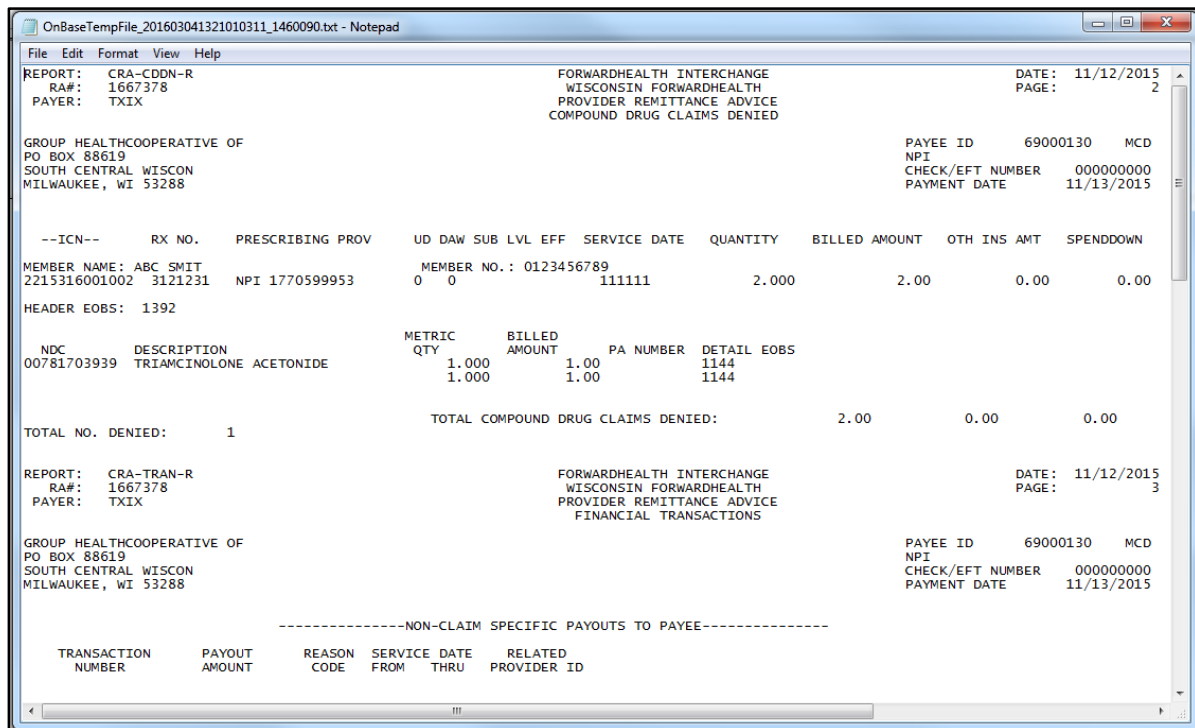

Figure 10 RA Text Report

The RA text report will usually open in Notepad, the default text viewing and editing program for most computers; however, the report may be opened in any text program.

3.1 Format the Remittance Advices Text File

To properly view and print the RA text file, you may need to make some formatting adjustments. These adjustments can be made in any text editing program; however, the examples below use Notepad.

1. From the main menu at the top of the browser window, click **Format**. The Format drop-down menu will be displayed.
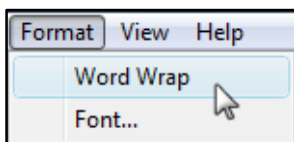
Figure 11 Format Drop-down Menu

2. Ensure that there is *not* a checkmark next to Word Wrap. If there is a checkmark next to Word Wrap, select **Word Wrap** to uncheck the option.

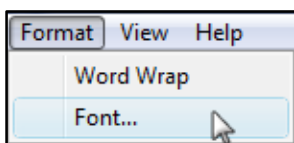3. From the Format drop-down menu, select **Font**.

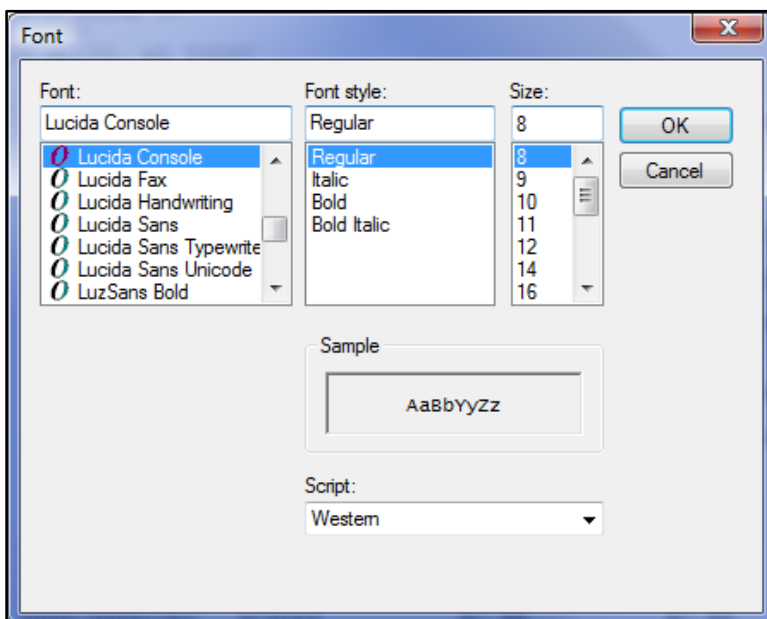**Figure 12** Format Drop-down Menu

The Font window will open.

Figure 13 Font Window

4. Select **Lucida Console** as the font type if it is not already selected.

Note: You may select any non-proportional (fixed-width) font type. A proportional font type such as Times New Roman has varying character widths and will not allow the text file to be properly aligned.

5. Change the Size to 8.

6. Click **OK**.

7. From the main menu at the top of the browser window, click **File**.
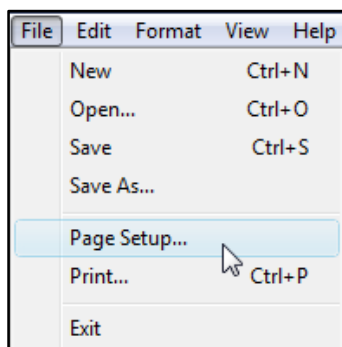
Figure 14 File Drop-down Menu

8. From the File drop-down menu, select **Page Setup**. The Page Setup window will open.
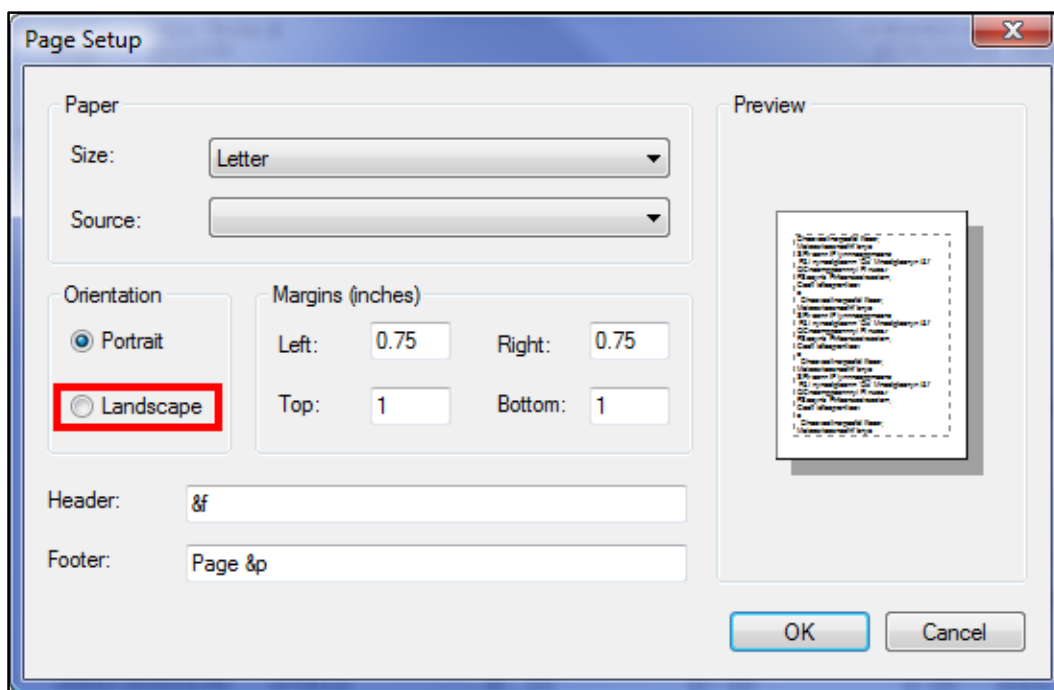
Figure 15 Page Setup Window

9. Under Orientation, click **Landscape**.

10. Click **OK**.

11. To print the file, select **Print** from the File drop-down menu.

If you wish to have numbered pages, open the RA in a word processing program such as Microsoft® Office Word and, after making the same formatting changes as detailed above for the text file, add page numbers to the RA.

4 Download Remittance Advices in a Comma-Separated Values Report Format

A CSV file is a specially formatted plain text file which stores information in a format that can be easily imported into a spreadsheet or database.

Note: If you receive an error message or are unable to access the report, refer to Section 6 Configure Web Browser for instructions on setting up your web browser.

1. From the "Comma-Separated-Values Format (.csv)" section of the Remittance Advices page, click **Download remittance advices in a CSV (.csv) report format**.

Comma-Separated-Values Format (.csv)

Use the following links to access remittance advices in CSV format. Users will be able to select which specific RA they would like to download. Users will also be able to choose which sections of the RA they would like to include in the download file. A provider or MCOs last 10 remittance advices will be available in CSV format.

- Download remittance advices in a CSV (.csv) report format

- View the RA User Guide

- View the CSV file User Guide

- View EOB codes and descriptions

Figure 16 Comma-Separated-Values Format (.csv) Section

The Download RA page will be displayed.

Download RA ?

ForwardHealth offers the 10 latest Remittance Advices (RAs) for download in a Comma-Separated-Values (CSV) format. Users have the option to download the full RA or to select specific sections to include in the CSV file.

To download an RA in CSV format:

- Select an RA to download from the list below

- Select "All" to download the full RA
   -or-
  Select the specific RA section you would like included in the file

- Click submit and save (or open) the CSV.

Remittance Advices

RA Number	RA Date	Check/EFT Number	Banner Messages
311952	06/22/2010	000000000	7 messages
311700	05/17/2010	000000000	
311683	05/13/2010	000055667	
311590	05/03/2010	000055611	
311028	03/08/2010	000055383	
310926	02/25/2010	000055332	
310882	02/19/2010	000055319	

Select an RA section to download:

☑ All   ☐ Summary   ☐ Medicare Crossover - Professional Claims

☐ Payment   ☐ Inpatient Claims   ☐ Medicare Crossover - Institutional Claims

☐ Payment Hold   ☐ Outpatient Claims   ☐ Compound Drug Claims

☐ Service Codes   ☐ Professional Service Claims   ☐ Drug Claims

☐ Financial Transactions   ☐ Long Term Care Claims   ☐ Dental Claims
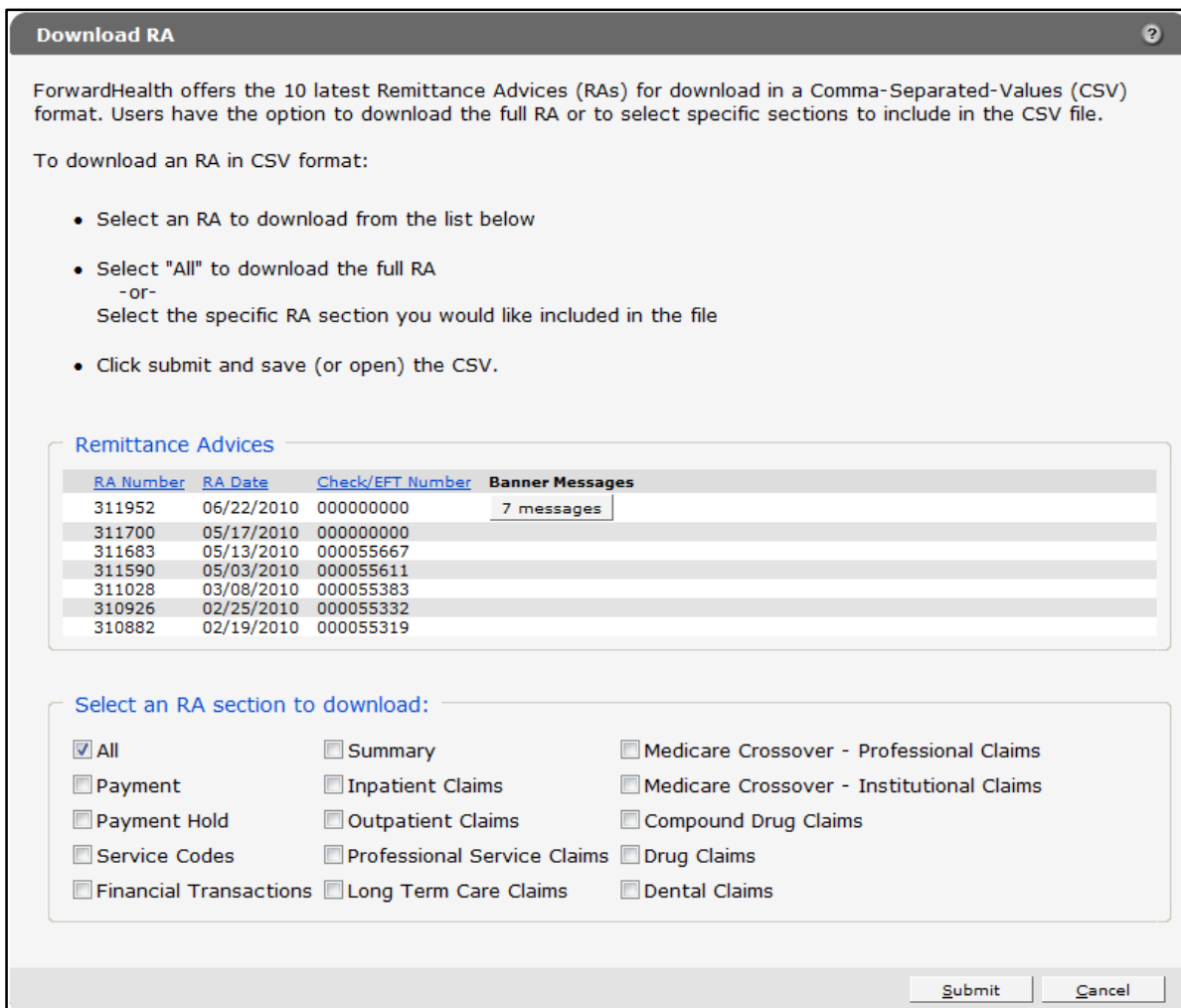
Submit   Cancel

Figure 17 Download RA Page

On the Download RA page, users can choose to download their 10 most current RAs.

If there is a banner message(s) for an RA, users can click the button in the Banner Messages column to view the message(s).

2. Click the row of the RA you wish to download. In the "Select an RA section to download" section, the All box is checked by default. The entire RA will be downloaded if this option is checked.

3. To download parts of the RA, uncheck the All box and check the box for the parts of the RA you wish to download.
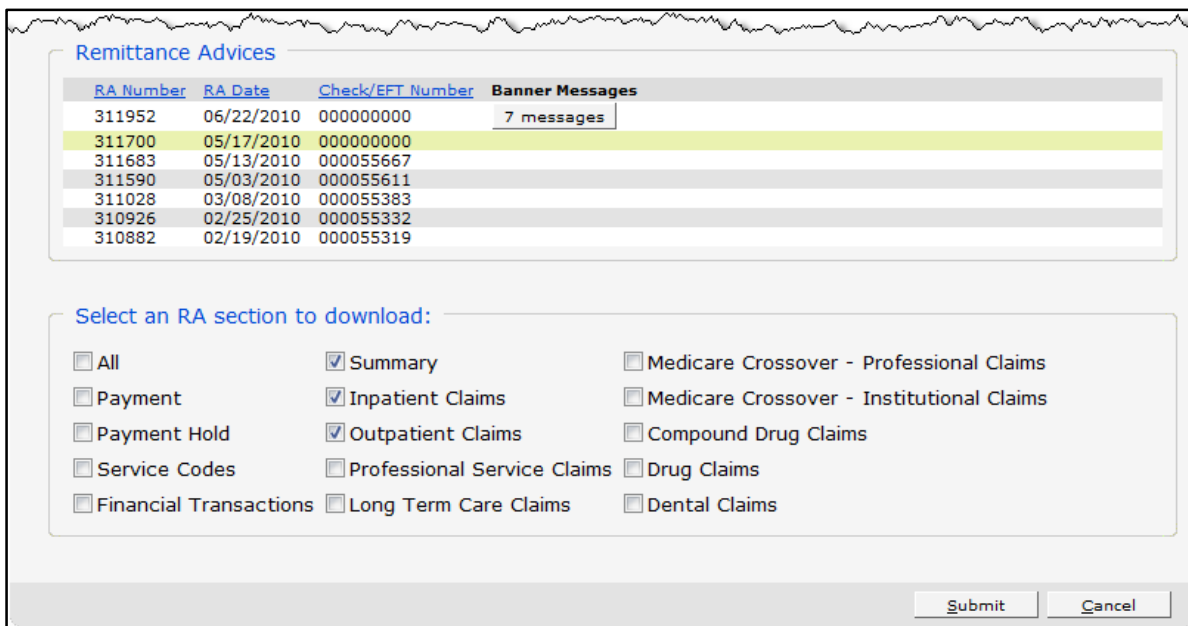
Figure 18 Remittance Advices and Select an RA Section to Download Sections

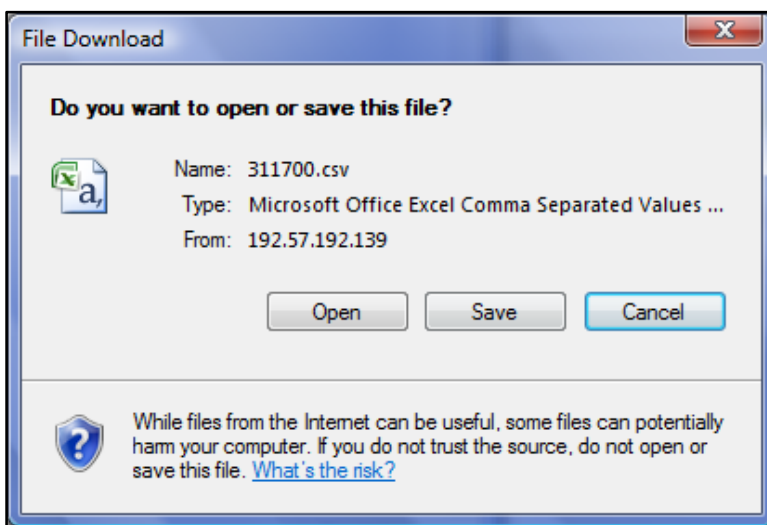4. Click **Submit**. The File Download window will be displayed.

Figure 19 File Download Window

Note: You *must* save the file in order to properly download and format it as a spreadsheet document.

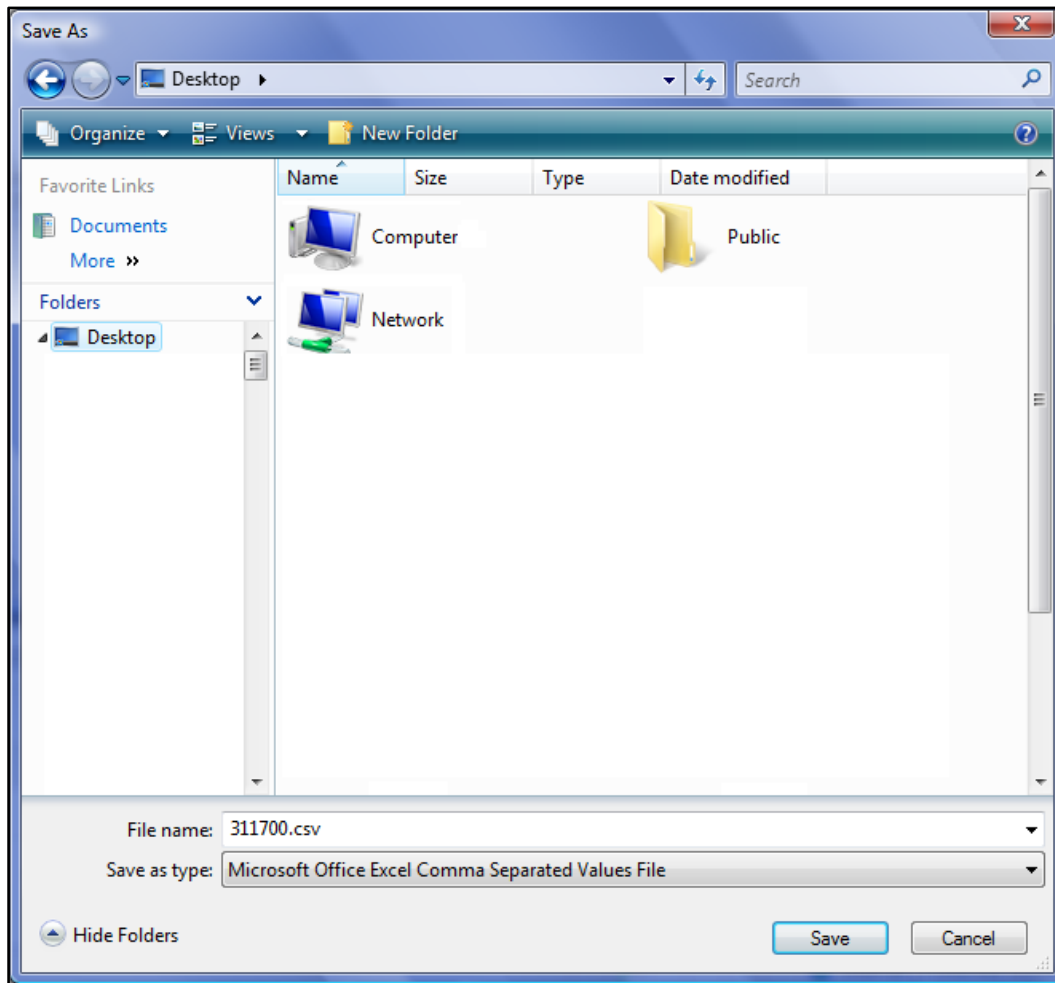5. Click **Save**. The Save As window will be displayed.

Figure 20 Save As Window

6. Choose a location on your computer or network to save the RA.

7. Click **Save**. The file will download. Depending on the size of the RA file, the download could take several minutes. Once the file is downloaded, the Download complete window will be displayed.

Figure 21 Download Complete Window

8. Click **Open**. The CSV file will open in a new window.

    Note: The examples below use Microsoft® Office Excel 2007. If you are using another program, consult the Help function of your specific program for instructions on how to import the file.

Figure 22 CSV File

4.1 Format the Comma-Separated Values File

In order to properly read the CSV file, you will need to import the file into a spreadsheet or database program and format it.

1. Open a blank spreadsheet.

2. In the menu bar at the top of the screen, click **Data**. The Data menu will be displayed.
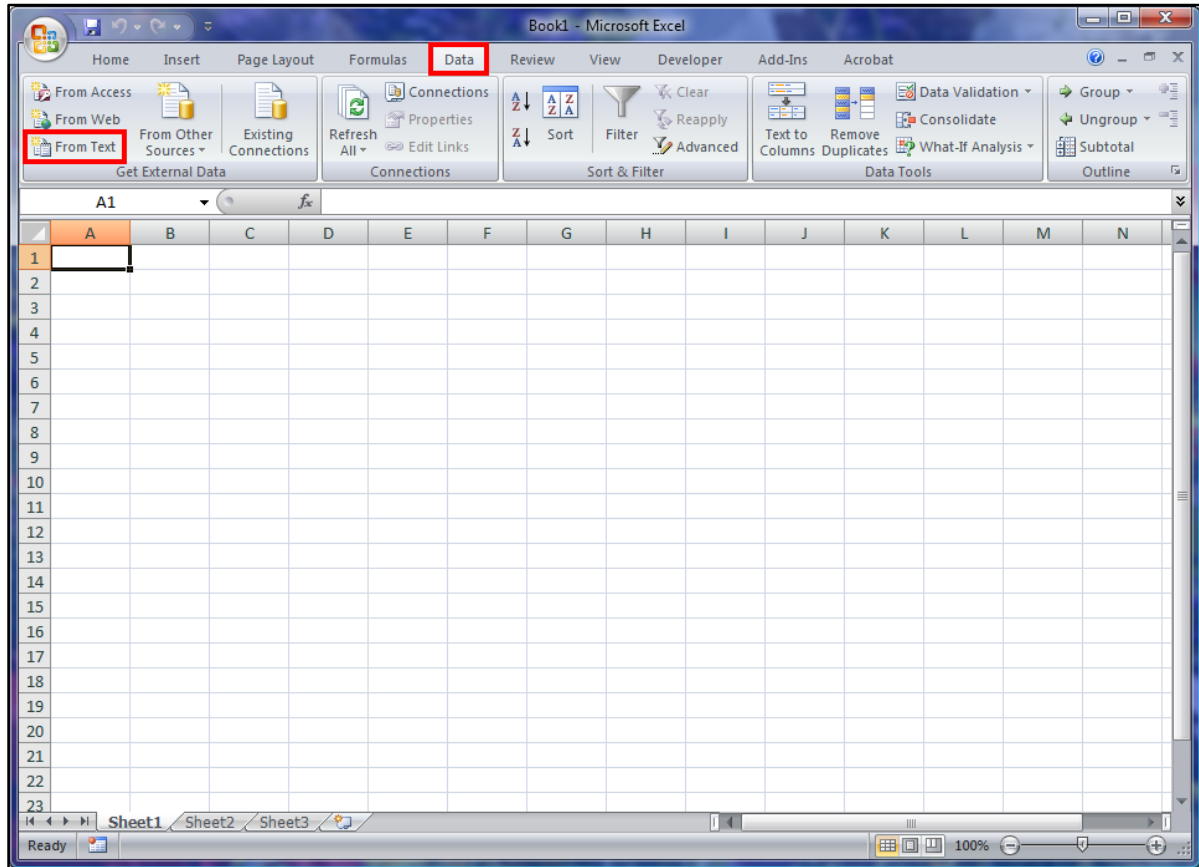
Figure 23 Blank Spreadsheet

3. Click **From Text** located on the left of the Data menu. The Import Text File window will open.
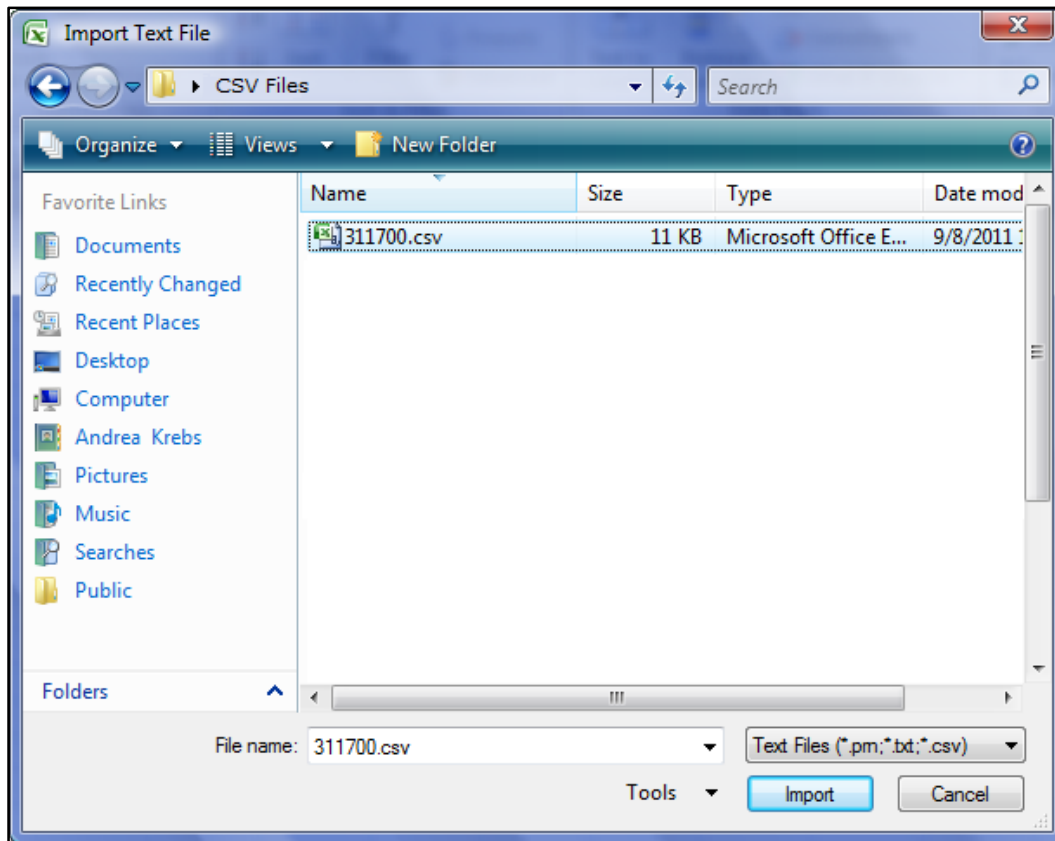
Figure 24 Import Text File Window

4. Navigate to the location where you saved the CSV file and select the file.

5. Click **Import**. The Text Import Wizard — Step 1 of 3 window will be displayed.
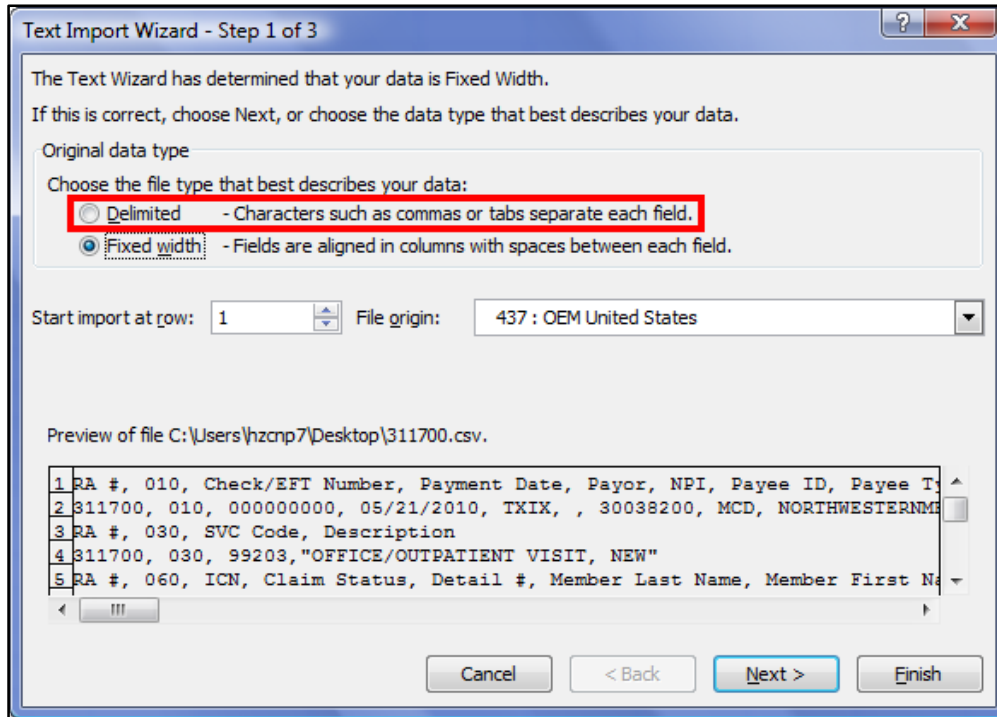
Figure 25 Text Import Wizard — Step 1 of 3 Window

6. In the "Original data type" section, click **Delimited**.

7. Click **Next**. The Text Import Wizard — Step 2 of 3 window will be displayed.
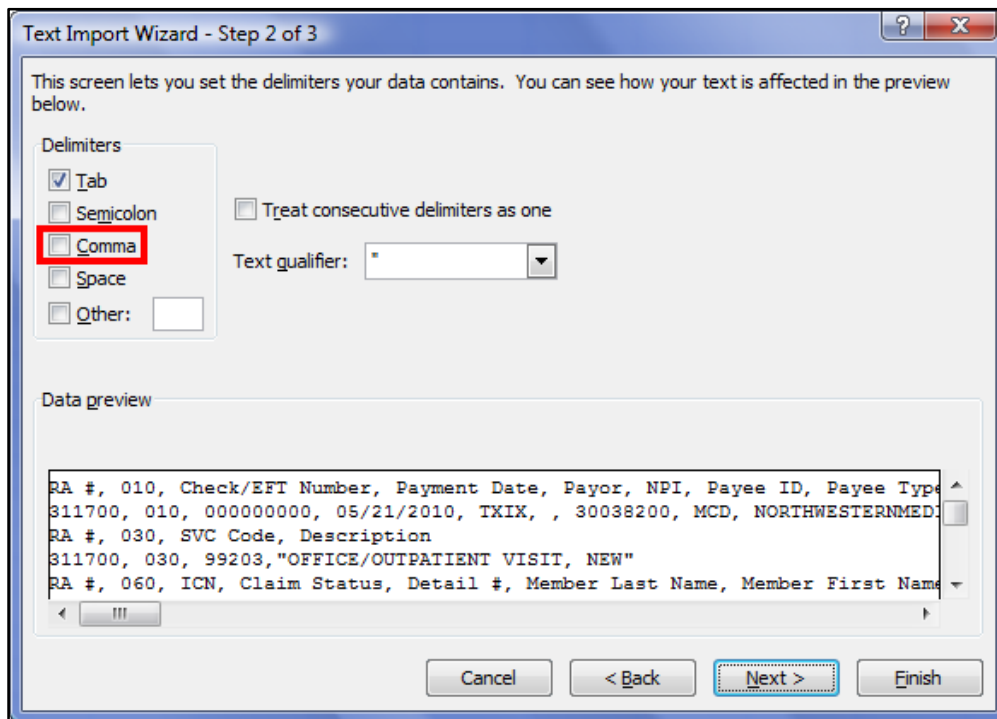
Figure 26 Text Import Wizard — Step 2 of 3 Window

8. Check the **Comma** box.

9. Clear any additional boxes that are checked.

10. Click **Next**. The Text Import Wizard — Step 3 of 3 window will be displayed.
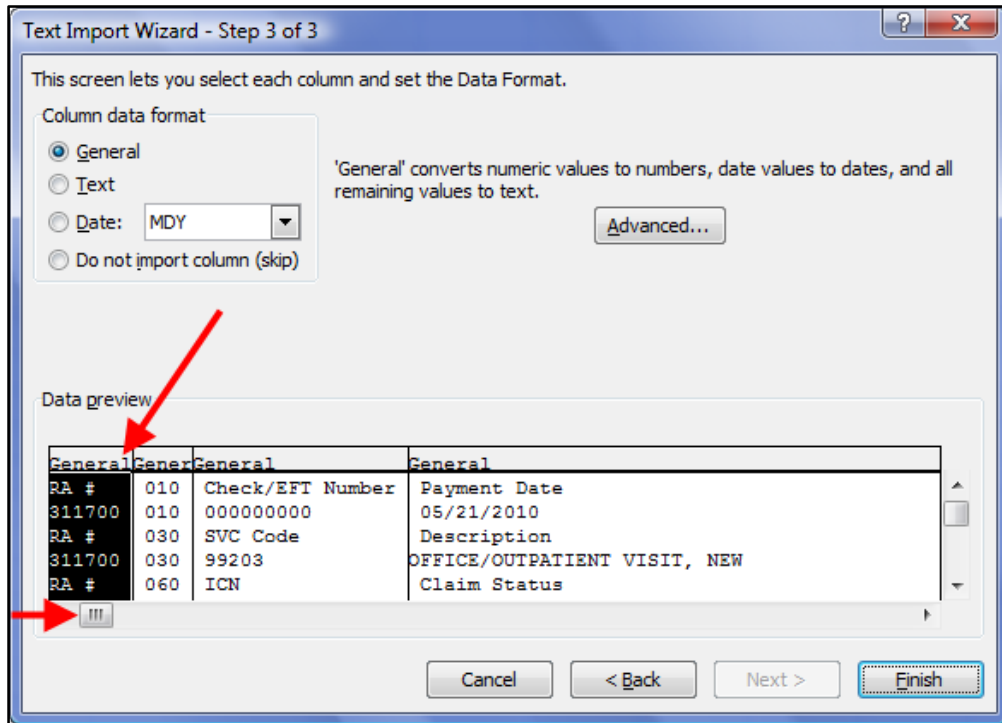
Figure 27 Text Import Wizard — Step 3 of 3 Window

11. Click the first column on the left in the "Data preview" section.

12. Hold down the Shift key.

13. While holding down the Shift key, scroll to the last column.

14. Click the last column. All the columns should be selected (highlighted).
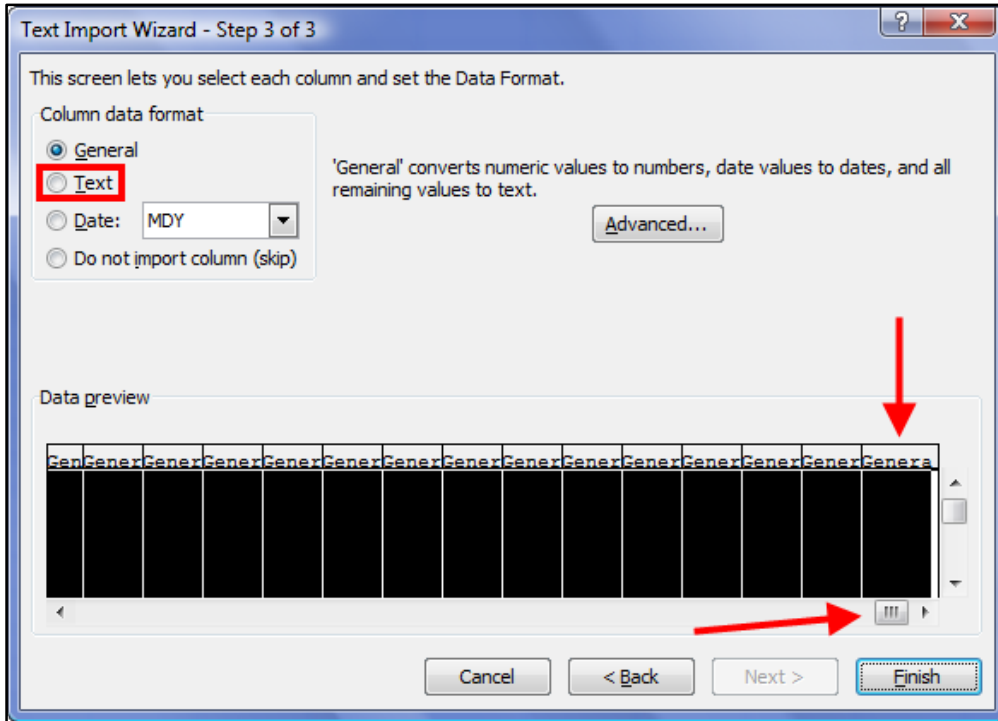
Figure 28 Text Import Wizard — Step 3 of 3 Window with All Columns Selected

15. Select **Text** in the "Column data format" section.

16. Click **Finish**. The Import Data window will be displayed.
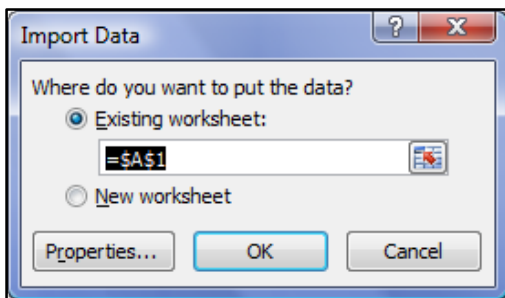
Figure 29 Import Data Window

17. Click Existing worksheet or New worksheet.

18. Click **OK**. The RA information will be displayed in the chosen worksheet. You can now sort or manipulate the data as needed.

Figure 30 RA in CSV Report Format

For information on reading the imported file, refer to the ForwardHealth Provider Portal Comma-Separated Values Remittance Advice User Guide.

5 View Explanation of Benefits Codes and Descriptions

1. On the Remittance Advices page, click **View EOB codes and descriptions** in the "Comma-Separated-Values Format (.csv)" section.

Comma-Separated-Values Format (.csv)

Use the following links to access remittance advices in CSV format. Users will be able to select which specific RA they would like to download. Users will also be able to choose which sections of the RA they would like to include in the download file. A provider or MCOs last 10 remittance advices will be available in CSV format.

- Download remittance advices in a CSV (.csv) report format

- View the RA User Guide

- View the CSV file User Guide

- View EOB codes and descriptions

Figure 31 Comma-Separated-Values Format (.csv) Section

The Explanation of Benefits Code Listing page will be displayed.

Explanation of Benefits Code Listing

An Explanation of Benefits (EOB) code corresponds to a printed message about the status or action taken on a claim. Providers will find a list of all EOB codes used with the corresponding description on the last page of the Remittance Advice.

EOB Code	EOB Description
0000	This claim/service is pending for program review.
0001	Member's ForwardHealth I.d. Number Is Missing Or Incorrect
0002	ForwardHealth Number On Claim Does Not Match ForwardHealth Number On Prior Authorization Request.
0003	A minimum of one detail is required.
0004	DME rental beyond the initial 30 day period is not payable without prior authorization.
0005	Charges Paid At Reduced Rate Based Upon Your Usual And Customary Pricing Profile.
0006	Amount Paid Reduced By Amount Of Other Insurance Payment.
0007	Information inadequate to establish medical necessity of procedure performed.Please resubmit with additional supporting documentation.
0008	The Number Of Weeks Has Been Reduced Consistent With Goals And Progress Documented.
0009	Member Name Missing. Please Correct And Resubmit.
0010	Member is enrolled in Medicare Part A and/or Part B on the on the Dispense Dateof Service.
0011	Medicare Part A Services Must Be Resubmitted. Please Attach Copy Of Medicare Remittance.
0012	Service Paid At The Maximum Amount Allowed By ForwardHealth ReimbursementPolicies.
0013	Dollar Amount Of Claim Was Adjusted To Correct Mathematical Error.
0014	A discrepancy exists between the Other Coverage Indicator and the Other Paid Amount.
0015	Pediatric Community Care is limited to 12 hours per DOS.
0016	Drug Dispensed Under Another Prescription Number. Multiple Prescriptions For Same Drug/ Same Fill Date, Not Allowed.
0017	The Evaluation Was Received By ForwardHealth Fiscal Agent More Than Two Weeks After The Evaluation Date.

Figure 32 Explanation of Benefits Code Listing Page

2. Scroll to the EOB code you wish to view.

6 Configure Web Browser

Note: The examples in this user guide use Internet Explorer™. If you use a different web browser, the options or settings may appear slightly different. Consult the Help function of your specific browser for configuration information.

You must have Internet Explorer™ 6.0 or later to access reports. If you receive an error message or are unable to access a report, you may need to change some of your Internet Explorer™ settings.

6.1 Allow Pop-ups from ForwardHealth

1. Click **Tools** on the Internet browser's menu bar. A drop-down menu will be displayed.
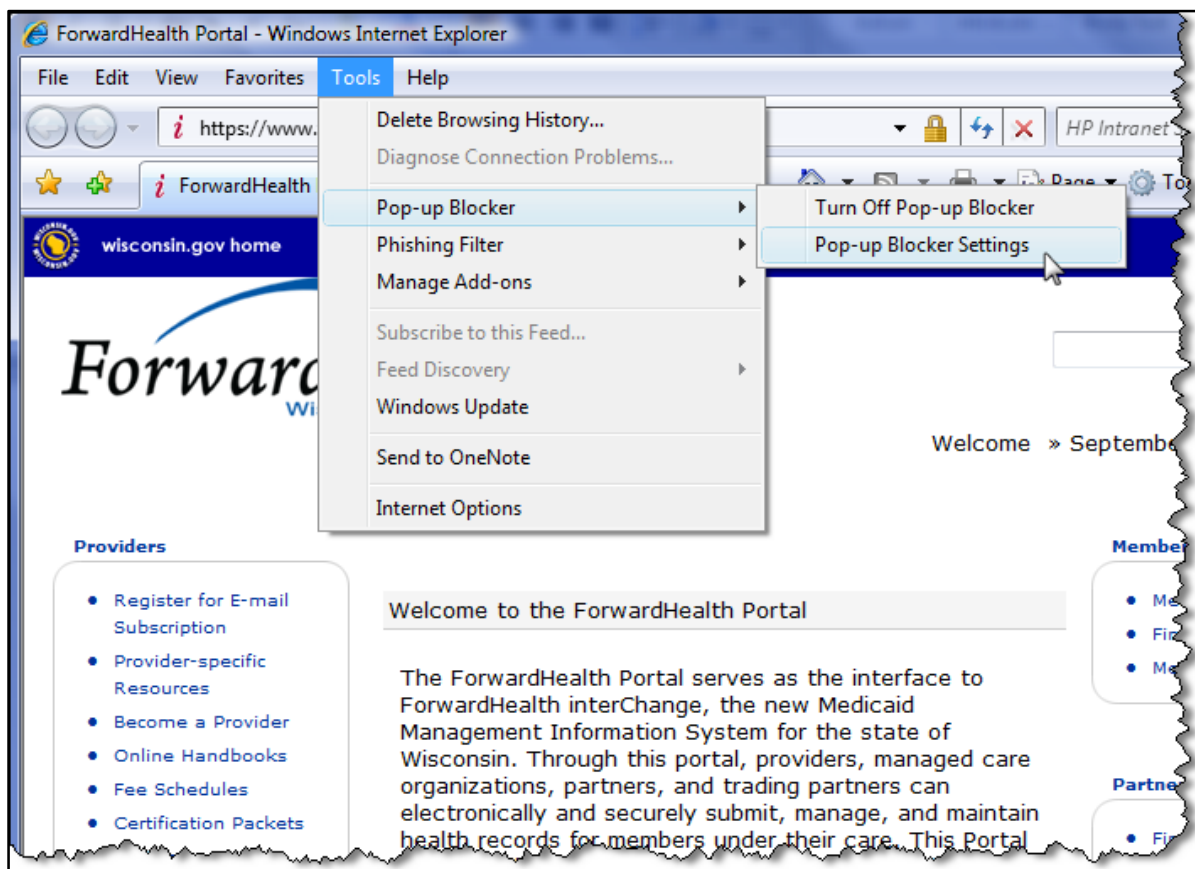
Figure 33 Tools Drop-down Menu

2. From the Pop-up Blocker menu, select **Pop-up Blocker Settings**. The Pop-up Blocker Settings window will be displayed.
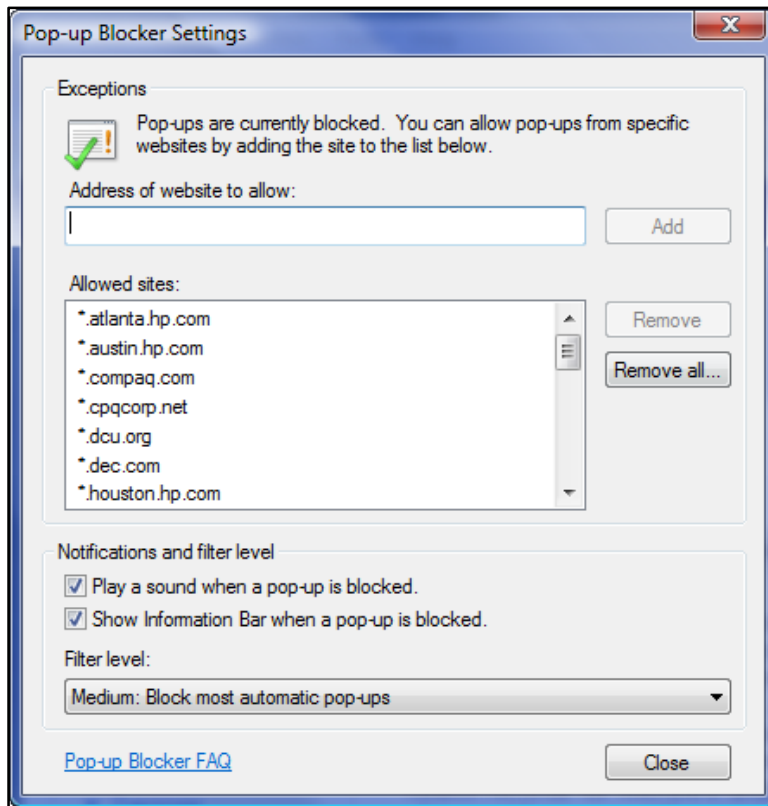
Figure 34 Pop-up Blocker Settings Window

3. In the Address of website to allow: field, type *www.forwardhealth.wi.gov*.
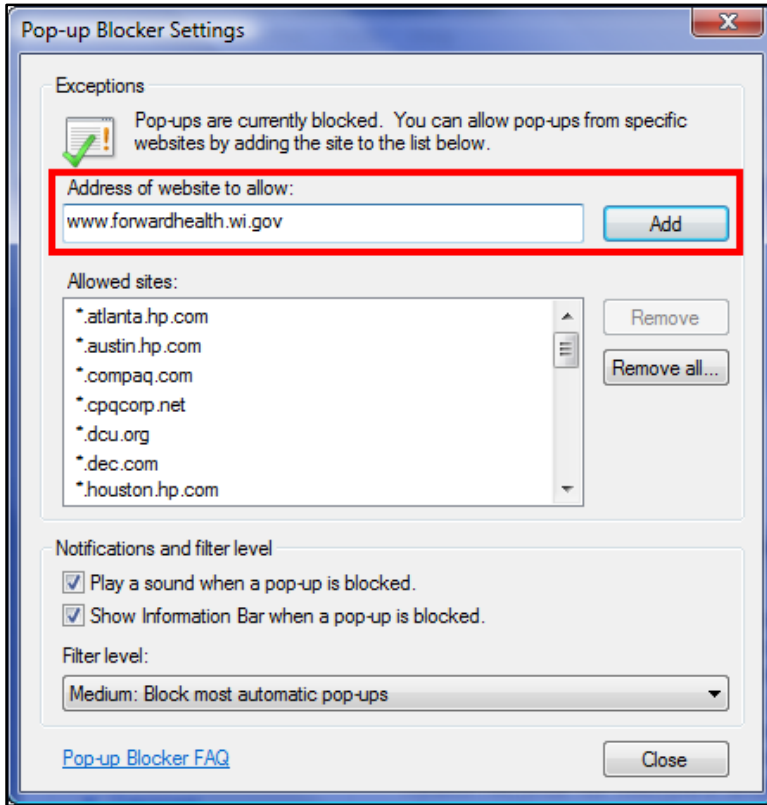
4. Click **Add**.

Figure 35 Pop-up Blocker Settings Window

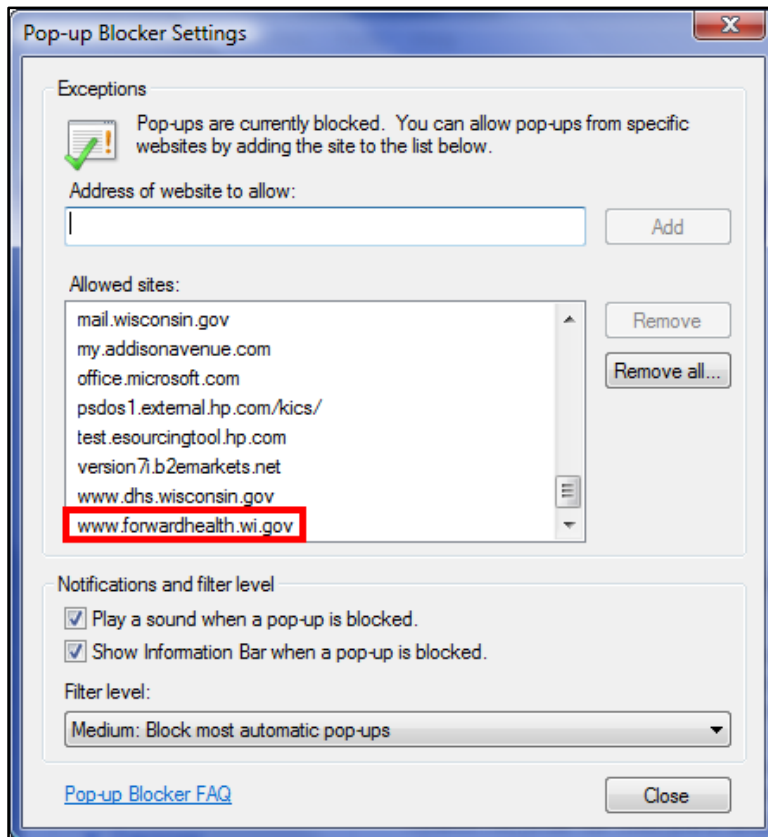The ForwardHealth Web address will be alphabetically added to the Allowed sites box.

Figure 36 Pop-up Blocker Settings Window With Added Web Site

5. Click **Close**.

6.2 Add ForwardHealth as a Trusted Site

1. Click **Tools** on the Internet browser's menu bar. A drop-down menu will be displayed.
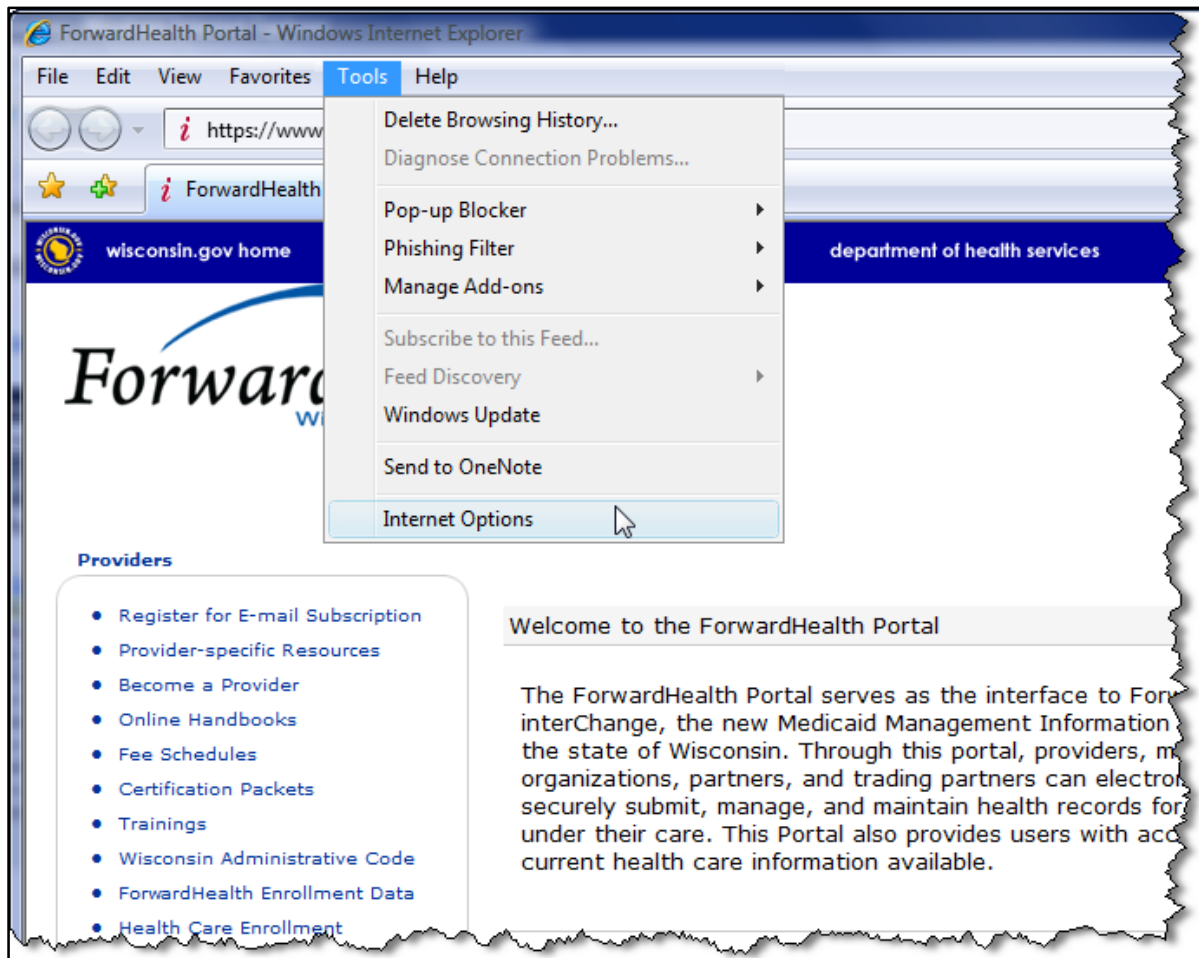
Figure 37 Tools Drop-down Menu

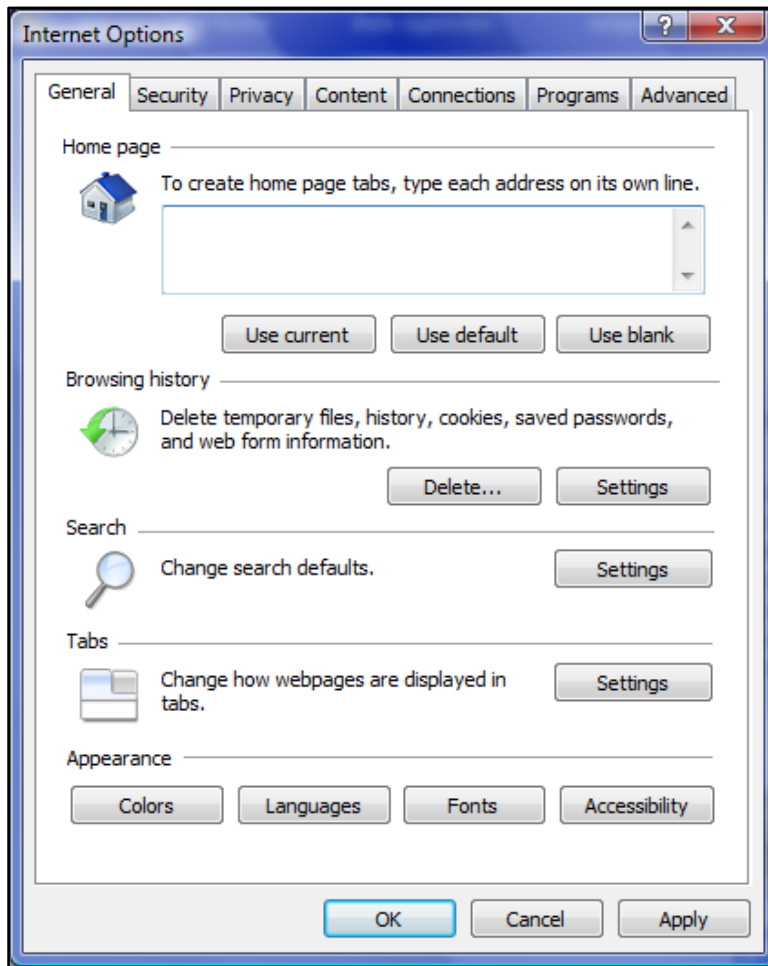2. Select **Internet Options**. The Internet Options window will be displayed.

Figure 38 Internet Options Window

3. Click the **Security** tab at the top of the window.

4. Under the "Select a zone to view or change security settings" section, click **Trusted sites**.
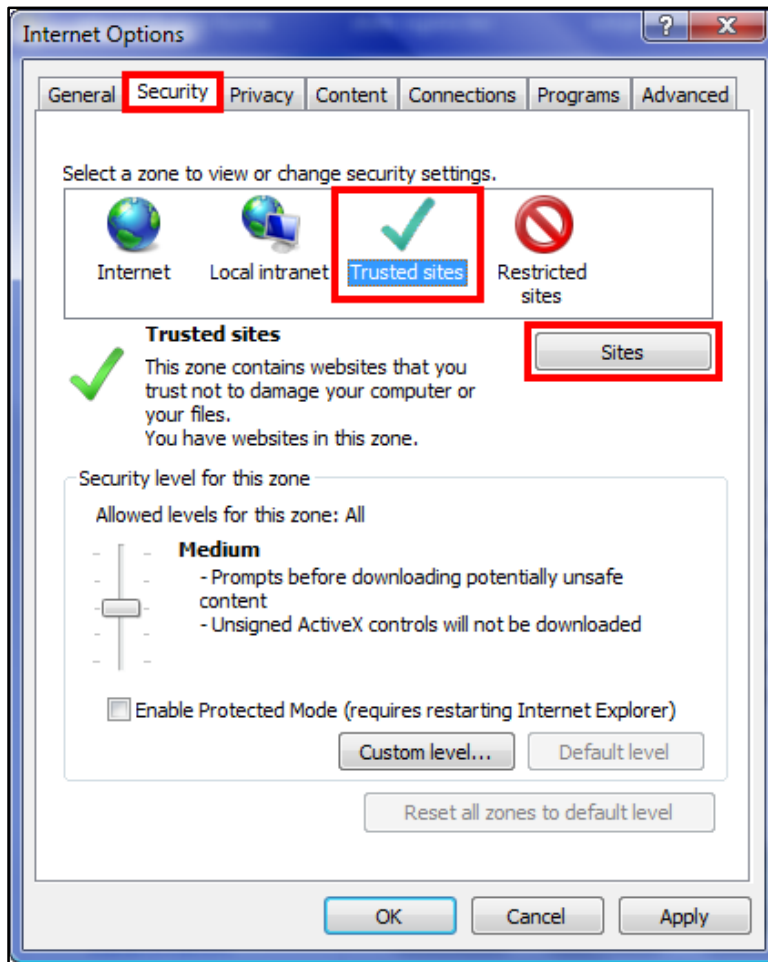
Figure 39 Internet Options Window

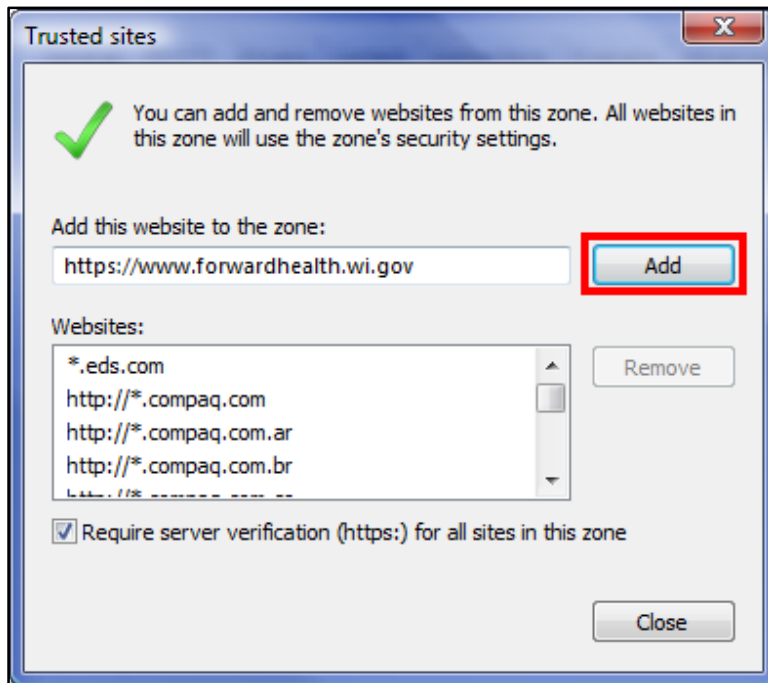5. Click **Sites**. The Trusted sites window will be displayed.

Figure 40 Trusted Sites Window

The Web site that you currently have open will automatically be populated in the "Add this website to the zone:" section. If this is not the ForwardHealth Web site, type *www.forwardhealth.wi.gov* in the field instead.

6. Click **Add**. The ForwardHealth Web address will be alphabetically added to the Websites box.
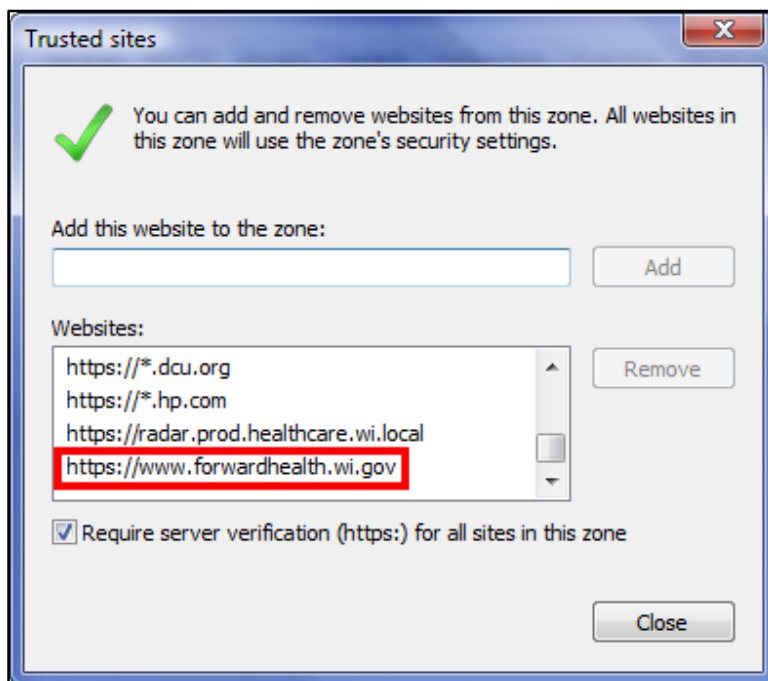

Figure 41 Trusted Sites Window With Added Web Site

7. Click **Close**.

8. Click **OK** to close the Internet Options window and to apply the selected settings.

6.3 Change Security Level

1. Click **Tools** on the Internet browser's menu bar.

2. Select **Internet Options** from the drop-down menu. The Internet Options window will be displayed.

3. Click the **Security** tab at the top of the window.

4. Under the "Select a zone to view or change security settings" section, click **Trusted sites**.
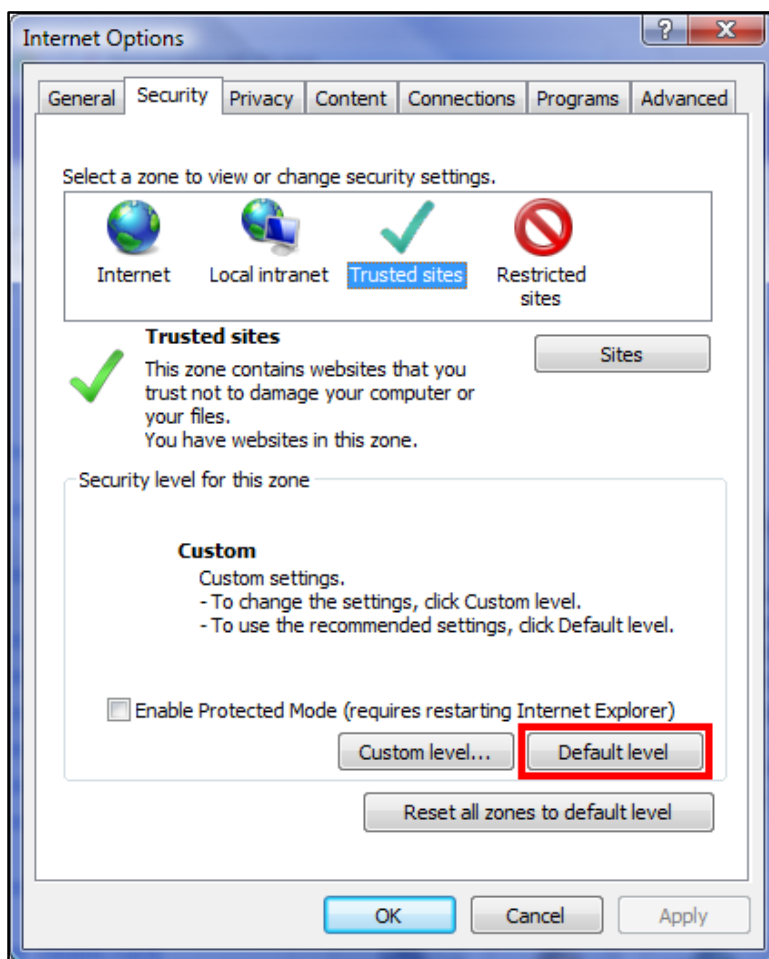
5. Click **Default level**.

Figure 42 Internet Options Window

The "Security level for this zone" section will change to the default level.

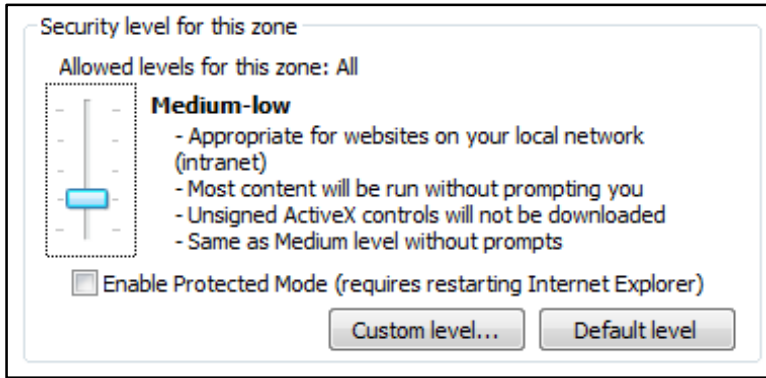6. Move the security level slider to **Medium-low**.

Figure 43 Security Level for This Zone Section

7. Click **OK** to close the Internet Options window and to apply the selected settings.