# User Instructions
## Partner Portal CLTS Waivers Role Access Request Instructions

*November 12, 2014*

*Version 1.0*

## Overview:

This documentation provides step-by-step instructions for gaining access to the CLTS Claims Extract, LTCare Encounter Datamart, LTC Encounter Audit and Archive, and National Code Set universes. Gaining access to these universes requires having a Forward Health Partner Portal account, and then requesting access to use individual data sets contained within the CLTS Waivers role. The data sets are referred to as "universes".

These instructions are split into two sections. Section 1 is used when you are a new user and need to establish a ForwardHealth Partner Portal account. Section 2 is used when you already have an existing ForwardHealth Partner Portal account, and want to request additional universe access for your account.

The high-level process is shown in Figure 1 below.

Figure 1:
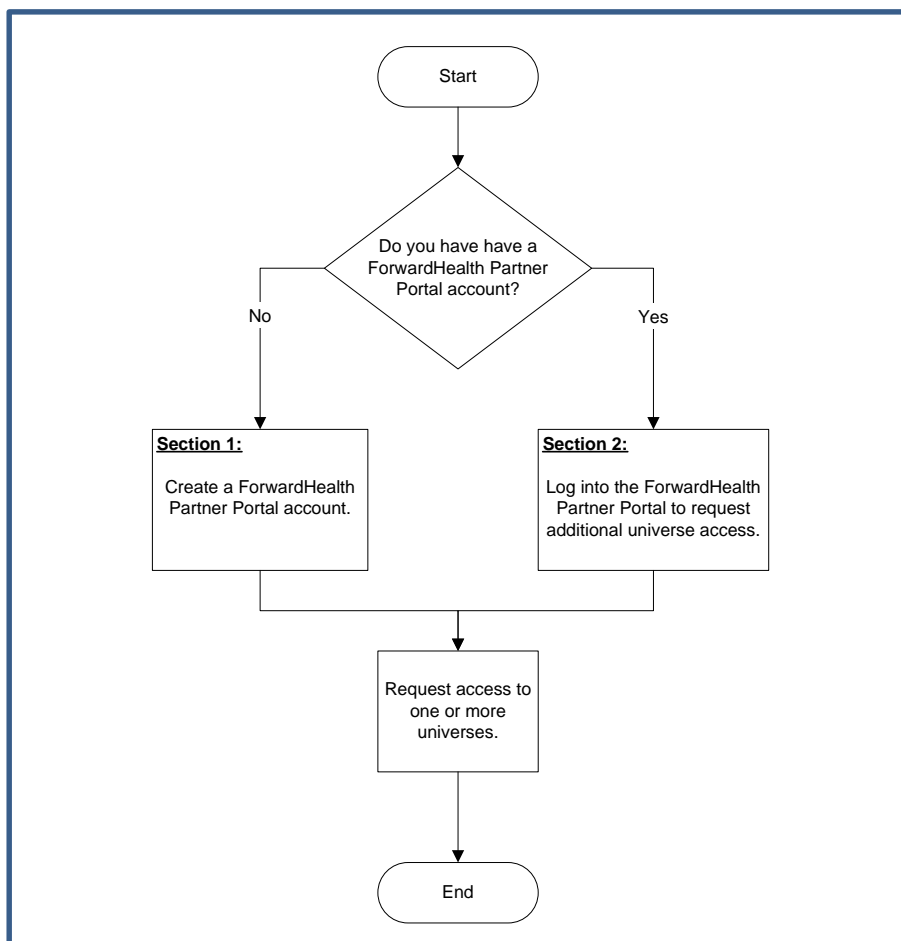


## Requesting Help:
If you need assistance, please contact your local security administrator. You can also contact the Portal Help Desk for assistance. The Portal Help Desk can be reached by phone at (866)908-1363, or by e-mail at VEDSWIEDI@wisconsin.gov.

| CLTS Waivers Access Request Instructions |
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**Section 1: You need to create a ForwardHealth Portal account and request specific universe access:**

You have determined that you need a ForwardHealth Partner Portal account. Start by entering your user information and requested user ID. Then, request access to the various universe data sets. Your agency's local security administrator will review your request, and either approve or deny the access request.

Follow these steps to create your new account and request universe access.

Step 1:
Navigate to the ForwardHealth Portal (https://www.forwardhealth.wi.gov/WIPortal/).

Step 2:
From the ForwardHealth portal home page, click on 'Partners'.

Step 3:
On the right-hand side of the page, click 'Partner Request Access'.



Step 4:
Select the first option: 'New user requesting Partner Portal Access'.

Step 5:
Enter your First and Last Name, E-Mail Address, Requested User ID, Work Phone Number, and select a Role from the dropdown menu ('CLTS Waivers'). Read the security agreement, check the box, and then click 'Next'.

Step 6:
Select your Certifying Agency/Site Code from the dropdown menu, and click 'Next'.

Step 7:
Select the universe you want access to from the universe dropdown menu. Next, select a universe control item(s) by checking the box next to the agency data you want access to, and then click 'Save'. Universe control items are additional security controls that vary from universe to universe. Some universes will have mulitple universe control items that can be chosen.

For this step, we will be using the 'CLTS Claims Extract' as an example universe. The universe you select here depends upon your data needs.

Select 'CLTS Claims Extract' from the universe dropdown menu. Check the box next to the universe control item(s) you want access to, and then click the 'Save' button located on the bottom right-hand side of the page.



Select any additional universes you would like to request access to following the same procedure as above. Once finished, the desired universes will now be visible in the 'Universe Requested' portion of this pane. Click the 'Next' button to continue.

Step 8:
Enter your Password, Secret Questions, and Answers (these will be used to reset your password in the future), and click 'Submit'.



If the submission is successful, the following message will be displayed:



If there was a problem with the submission, an error message will be displayed indicating what corrections need to be made.

Step 9:

Your ForwardHealth Partner Portal account will be created. After your universe access request(s) are approved by your local security administrator, you will be contacted via e-mail by the LTCare Data Warehouse team notifying you that your request(s) have been completed.

**Section 2:  You already have a ForwardHealth Portal account, but need to request additional universe access:**
The steps described in section 2 apply when you already have an existing ForwardHealth Partner Portal account and wish to request additional universe access to your account. Start by logging into the partner portal using your username and password. Then, request access to the various universe data sets through the 'Partner DSS Universe Management' link. Your agency's local security administrator will review your request, and either grant or deny the access request.

Follow these steps to add additional universe access to your account.

Step 1:
Navigate to the ForwardHealth Portal (https://www.forwardhealth.wi.gov/WIPortal/)

Step 2:
From the ForwardHealth portal home page, click on 'Partners'.

Step 3:
Log into the partner portal using your username and password.



Step 4:
On the right-hand side of the page, click 'Partner DSS Universe Management' within the 'Quick Links' section.

Step 5:
Select the universe you want access to from the universe dropdown menu. Next, select a universe control item(s) by checking the box next to the agency data you want access to, and then click 'Save'. Universe control items are additional security controls that vary from universe to universe. Some universes will have mulitple universe control items that can be chosen.

For this step, we will be using the 'Encounter Datamart' as an example universe. The universe you select here depends upon your data needs.

Select 'Encounter Datamart' from the universe dropdown menu. Check the box next to the universe control item(s) you want access to, and then click the 'Save' button located on the bottom right-hand side of the page.



Select any additional universes you would like to request access to following the same procedure as above. Once finished, the desired universes will now be visible in the 'Universe Requested' portion of this pane. Click the 'Next' button to continue.

Step 6:
After your universe access request(s) are approved by your local security administrator, you will be contacted via e-mail by the LTCare Data Warehouse team notifying you that your request(s) have been completed.