

User Instructions
Partner Portal CLTS Waivers Role
Access Request Instructions

November 12, 2014

Version 1.0

CLTS Waivers Access Request Instructions

Author: LTCare Data Warehouse Team

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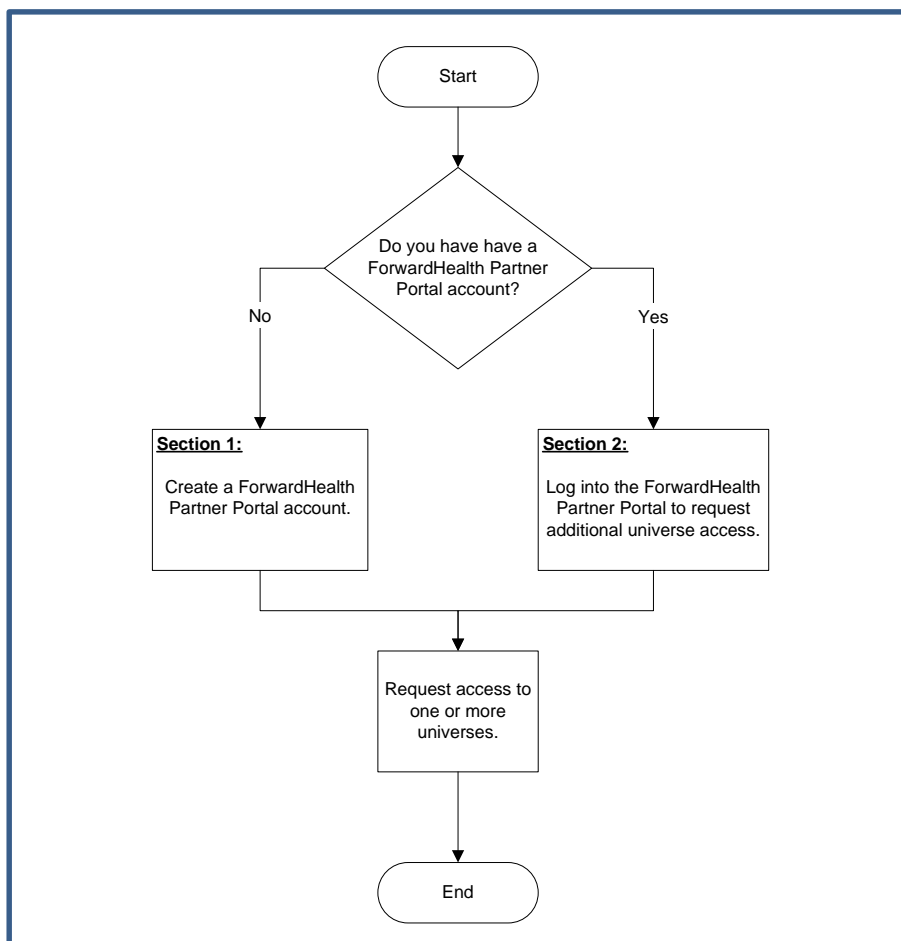
Overview:

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.

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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'.

The screenshot shows the ForwardHealth Wisconsin portal home page. At the top left is the logo "ForwardHealth Wisconsin serving you". At the top right is a "Report Fraud" button and a search box. Below the logo is a "Welcome" message with the date and time "Welcome - May 13, 2014 1:47 PM" and a "Login" link. The main content area is divided into several sections: "Providers" (with a list of links like "Register for E-mail Subscription"), "Managed Care" (with links like "Related Programs and Services"), "Members" (with links like "Member Information"), "Partners" (with links like "Find a Provider"), and "Trading Partners" (with links like "Trading Partner Profile"). A central banner area contains a "Welcome to the ForwardHealth Portal" message and a row of five icons: "Providers", "Managed Care Organization", "Partners", "Trading Partners", and "Members". A red arrow points to the "Partners" icon. Below the banner is a "Hot Topics" section with links to "ICD-10 Code Set Transition Home page", "New Rate Reform Part 3 Ideas/Recommendations Requested", "Incentive Payments... Are you Eligible?", and "ForwardHealth System Generated Claim Adjustments". At the bottom is a footer with links for "About", "Contact", "Disclaimer", and "Privacy Notice", the "Wisconsin Department of Health Services" logo, and the production ID "Production PROD_WIPortal_M430C_1-1".

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Step 3:

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

Quick Links

- [Online Handbooks](#)
- [ForwardHealth Updates](#)
- [Max Fee Schedules](#)

- [Partner Request Access](#) 
- [Partner Portal User Guide](#)

- [Wisconsin Well Woman Program Policy and Procedure Manual](#)

- [Express Enrollment for Children](#)
- [Express Enrollment Change Request](#)

Step 4:


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

Portal Access Choose Request Type

Required fields are indicated with an asterisk (*).

Select what you wish to do

Request Type*

- New user requesting Partner Portal Access 
- New User requesting Partner Portal and Partner Portal Administrative Access

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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'.

Portal Access Request Information

Required fields are indicated with an asterisk (*).

- Requested User ID must be Alphanumeric.
- Requested User ID can not begin with a number.
- Requested User ID must be at least 6 characters in length.
- Requested User ID can not be greater than 20 characters.

User Information

First Name*

Last Name*

E-Mail Address*

Confirm E-Mail*

Requested User ID*

Work Phone Number* Ext.

Role*

Date Requested

Security Agreement

The User understands that the Portal Access User Account Agreement (hereinafter "Agreement"), effective today, is made by and between the State of Wisconsin Department of Health Services ("DHS") and users who sign up for an account on this website (hereinafter "User").

WHEREAS, User renders certain professional health care services ("Services") to ForwardHealth members, and submits documentation of those Services to DHS; and,

WHEREAS, DHS, in its implementation of the ForwardHealth program in Wisconsin, provides a System of operational and informational support to respond to User inquiries to exchange

Please check the box if you have read and agreed to Wisconsin's User Security Agreement.

Previous Next Exit Clear

Step 6:

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

Portal Access Additional Information

Required fields are indicated with an asterisk (*).

Certifying Agency/Site Code*

Financial Payer Information

BadgerCare Plus/Medicaid

WCDP

WWWP

ADAP

Previous Next Exit Clear

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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 multiple 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.

Portal Access DSS Universe Request

Required fields are indicated with an asterisk (*).

[Universe Requested](#) [Status](#)

Select row above to update -or- click Add button below.

Universe*

Please select one or more of the Universe Control Items below*

WPS Insurance Corporation: 23119999 North Central HLTH Care - Lincoln Co.: 23110011

Adams Co. HLTH and Human SVCS Dept: 23110011 Marinette Co. HLTH and Human SVCS Dept: 23110011

Ashland Co. HLTH and Human SVCS: 23110021 Marquette Co. Dept of Human SVCS: 23110021

0341 Richland Co. DHHS: 23110521

: 23113341 Rock Co. Developmental Disabilities Brd: 23110531

St. Croix Co. DHHS: 23110551

0361 St. Francis Childrens Ctr-Washington Co: 23119661

.0371 Waukesha Co. DHHS: 23110671

Save Cancel

Previous Next Exit Clear

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.

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Portal Access DSS Universe Request

Required fields are indicated with an asterisk (*).

Universe Requested	Status
CLTS Claims Extract	Requested

Select row above to update -or- click Add button below.

Universe*

Please select one or more of the Universe Control Items below*

Save Cancel

Previous Next Exit Clear

Step 8:

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

Portal Access Secret Questions

Required fields are indicated with an asterisk (*).

Secret Questions

Password*

Confirm Password*

Secret Question 1*

Answer Question 1*

Secret Question 2*

Answer Question 2*

Previous Submit Exit Clear

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

The following messages were generated:

Save was successful. Once your request is processed, you will receive an email. If the request is approved, log in with your username and password.

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

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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.

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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'.

ForwardHealth
Wisconsin serving you

Report Fraud Search

Welcome » May 13, 2014 1:47 PM
[Login](#)

Providers

- Register for E-mail Subscription
- Provider-specific Resources
- Become a Provider
- Online Handbooks
- Fee Schedules
- Trainings
- Wisconsin Administrative Code
- ForwardHealth Enrollment Data
- Health Care Enrollment
- Provider Revalidation
- Enrollment Tracking Search
- Bed Assessment e-Payment
- Primary Care Rate Attestation
- Medication Therapy Management Case Management Software Approval Process

Managed Care

- Related Programs and Services
- ForwardHealth Enrollment Data
- Health Care Enrollment

Welcome to the ForwardHealth Portal

The ForwardHealth Portal serves as the interface to ForwardHealth InterChange, the new Medicaid Management Information System for the state of Wisconsin. Through this portal, providers, managed care organizations, partners, and trading partners can electronically and securely submit, manage, and maintain health records for members under their care. This Portal also provides users with access to the current health care information available.

Providers **Managed Care Organization** **Partners** **Trading Partners** **Members**

Hot Topics

- ICD-10 Code Set Transition Home page.
- New Rate Reform Part 3 Ideas/Recommendations Requested.
- Incentive Payments. . . Are you Eligible?
- ForwardHealth System Generated Claim Adjustments

Members

- Member Information
- Find a Provider
- Member Contacts

Partners

- Find a Provider
- Related Programs and Services
- Express Enrollment for Children
- Express Enrollment Change Request

Trading Partners

- Trading Partner Profile
- PES
- Companion Guides
- Medication Therapy Management Case Management Software Approval Process

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Wisconsin Department of Health Services
Production PROD_WIPortal_M430C_1-1

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Step 3:

Log into the partner portal using your username and password.

The Partner site is specifically designed to provide up-to-date ForwardHealth information and functionality specific to the following partners:

- Income Maintenance Workers/Coordinators
- Katie Beckett Program staff
- FosterCare and Subsidized Adoption workers
- Managed Care Organization Enrollment Brokers
- Child Support staff
- Wisconsin Well Woman Program Local Coordinating Agencies (LCAs)
- Social Security Administration (SSA)
- Aging and Disability Resource Centers (ADRCs)
- Subrogation workers
- Women, Infants, and Children (WIC) workers
- Wisconsin Department of Justice
- MetaStar
- Wisconsin Division of Juvenile Corrections

Partners should log in to the secure Partner Portal using the login area to the right on this page. The secure Partner Portal is designed to provide functions to each partner specific to the partner's relationship to the Department of Health Services and the various ForwardHealth programs as appropriate.

Accessing the Secure Partner Site

Many partner users were emailed their login information during October 2008. If you received your login information, you do not need to request access and can immediately enter your login information in the "Login to Secure Site" area to the right.

If you did not receive your login information in October 2008, you will need to request access by clicking the link below and completing the necessary request information.

[Request Secure Partner Site](#)

[Find a Provider](#)

Login to Secure Site

Username

Password

Go!

[Forgot your password?](#)

Quick Links

- Online Handbooks
- ForwardHealth Updates
- Max Fee Schedules
- Partner Request Access
- Partner Portal User Guide
- Wisconsin Well Woman Program Policy and Procedure Manual
- Express Enrollment for Children
- Express Enrollment Change Request

Step 4:

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

Quick Links

- Online Handbooks
- ForwardHealth Updates
- Max Fee Schedules
- Business Objects WebI
- Partner Request Access
- Partner Portal User Guide
- Partner DSS Universe Management
- Wisconsin Well Woman Program Policy and Procedure Manual
- Express Enrollment for Children
- Express Enrollment Change Request

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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 multiple 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.

Portal Access DSS Universe Request

Required fields are indicated with an asterisk (*).

[Universe Requested](#) [Status](#)

Select row above to update -or- click Add button below.

Universe*

Please select one or more of the Universe Control Items below*

WPS Insurance Corporation: 23119999 North Central HLTH Care - Lincoln Co.: 23110011

Adams Co. HLTH and Human SVCS Dept: 23110011 Marinette Co. HLTH and Human SVCS Dept: 23110011

Ashland Co. HLTH and Human SVCS: 23110021 Marquette Co. Dept of Human SVCS: 23110011

.0341 Waushara Co. Dept of Human SVCS: 23110691

: 23113341 Lutheran Social SVCS - Waushara Co.: 23118691

Winnebago Co. Human SVCS Dept: 23110701

.0361 Wood Co. Dept of Social SVCS: 23110711

10371 Wood Co. Unified SVCS: 23110712

Save Cancel

Previous Next Exit Clear

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.

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Portal Access DSS Universe Request ?

Required fields are indicated with an asterisk (*).

<u>Universe Requested</u>	<u>Status</u>
Encounter Datamart	Requested

Select row above to update -or- click Add button below.

Universe*

Please select one or more of the Universe Control Items below*

Save Cancel

Previous Next Exit Clear

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.