

Eligibility Verification Guide for the Community Recovery Services Benefit

How to obtain a Logon ID for the ForwardHealth Partner Portal

Access to the Forward Health Partner Portal can be requested by following the steps below.

Go to the Forward Health Portal (<https://www.forwardhealth.wi.gov/WIPortal/>), and then click on the green “Partner Portal” icon pictured below.



(About halfway down the page with other icons)

This will take you to the ‘Partner Login’ webpage.

On the right side of the webpage you will find a menu with the name ‘Quick Links’ (Pictured to the right).

Click on the link ‘*Partner Request Access*’ to access the online ‘Portal Access Request Information’ webpage where you will be able to submit your request for a login ID.

Quick Links

- [Online Handbooks](#)
- [ForwardHealth Updates](#)
- [Electronic Data Interchange](#)
- [Max Fee Schedules](#)
- [Partner Request Access](#)

After the required information is entered and submitted you, the user will receive an email with password information needed to log into the secure Partner Portal.

This process may take up to a week.

The ‘*Account User Guide*’ in the upper right hand corner of the ‘*Partner Portal*’ webpage has additional information about:

- How to request access and
- Logging into the Partner Portal

Login to Secure Site

[Username](#)

[Password](#)

Go!

- [Forgot your password?](#)
- [Account Users Guide](#)

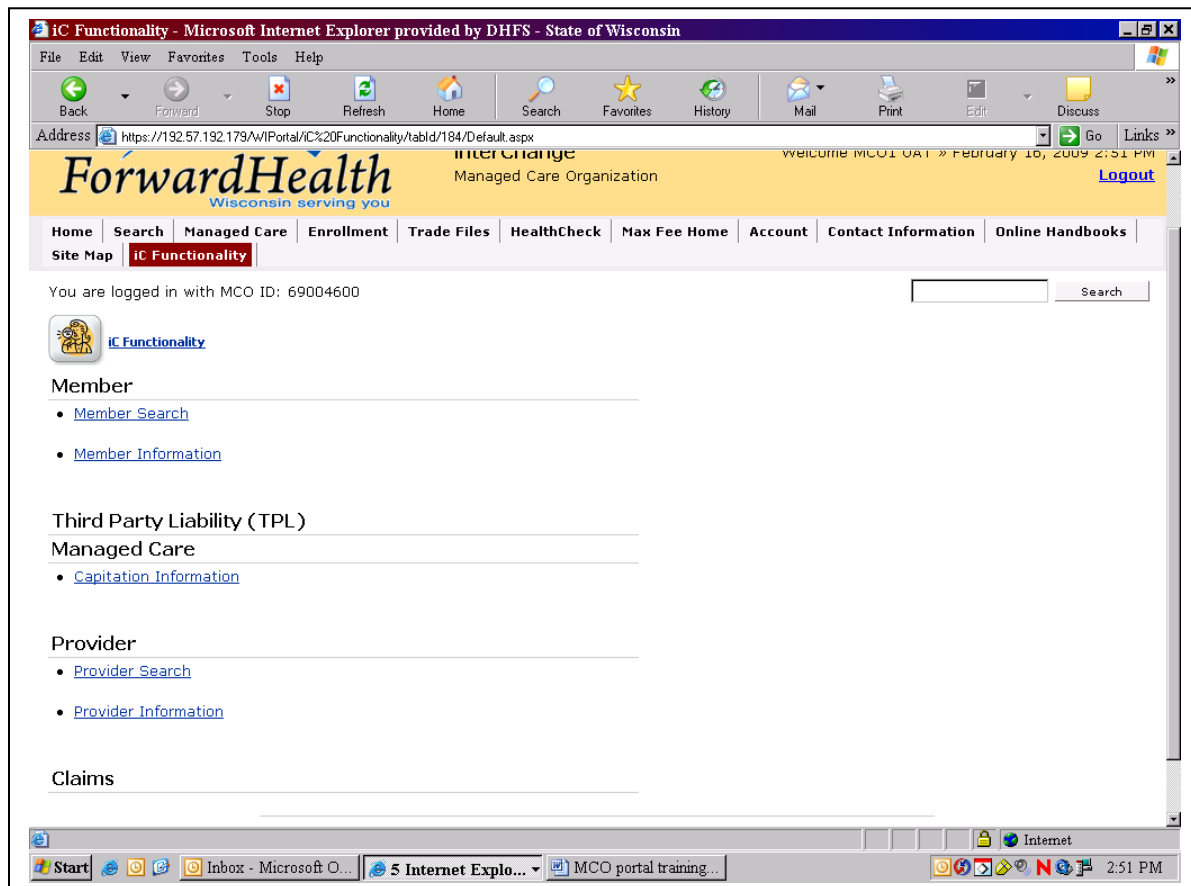
Once logged into the secure Partner Portal, users can verify the necessary member eligibility information using the instructions that follow.

How to Verify Member Benefit Plan and Medical Status Codes

After logging into the Partner Portal, the user will see a tab at the top of the page, called “*iC Functionality*”

Clicking on the “*iC Functionality*” tab will bring up the following Member options that are available to County Mental Health users:

- Member Search
- Member Information.



Note: Third Party Liability and Provider searches will not be available to County Mental Health users.

iC Functionality - Member Search

Clicking on ‘Member Search’ will bring up the screen below. As you can see, this screen allows many options to search for member information – including a name search and a “sounds-like” search. County Mental Health users are encouraged to narrow their searches by entering information in as many fields as possible since search requests that produce too many results will return an error.

Member Search

Member ID Last Name Sounds-like

Previous Member ID First Name

Medicare ID Previous Last Name

Case Number Previous First Name

CARES Case Birth Date

CARES PIN Gender

SSN County

Records search clear

The screen below shows an example of the results returned when searching on the last name of “TESTUSER”. As you can see at the bottom, there were at least 3 pages of results returned for this search request.

Member Search

Member ID Last Name Sounds-like

Previous Member ID First Name

Medicare ID Previous Last Name

Case Number Previous First Name

CARES Case Birth Date

CARES PIN Gender

SSN County

Records search clear

Search Results

Member ID	Last Name	First Name	MI	Birth Date	SSN	Medicare ID	Gender	County
9000060192	TESTUSER	PACE		08/22/1942	528-41-7639		M	Milwaukee
7000063173	TESTUSER	MAWCDC		01/01/1923	755-95-2369		M	Milwaukee
3000063137	TESTUSER	MEDICAID		01/01/1932	564-56-8956		F	Milwaukee
5550104002	TESTUSER	MANDATORY		09/19/1980	999-88-9939		F	Milwaukee
5550102518	TESTUSER	MARTHA		07/07/1937	999-88-6666		F	Rock
9010000024	TESTUSER	CLAIMSPDB		01/01/1992	999-49-8498		F	Dane
5550100110	TESTUSER	HISTORIED		01/07/1964	999-88-9929		M	Dane
8101210989	TESTUSER	TWOENROLL		01/01/1950	786-55-4656		M	Dane
5550100051	TESTUSER	ELISA		05/25/1990	999-88-9941		F	Dane
9010000033	TESTUSER	CLAIMSPDK		01/01/1969	784-84-5616		F	Dane
9010000035	TESTUSER	CLAIMSPDM		01/01/1975	978-94-4656		F	Dane
6000062761	TESTUSER	TESTA		01/01/1980	456-28-8655		M	Dane
1000063119	TESTUSER	FOURDATA		01/01/1920	125-47-8965		M	Milwaukee
9010000032	TESTUSER	CLAIMSPDJ		01/01/1972	745-61-6561		F	Dane
4000060948	TESTUSER	CLAIMSPD		01/01/1995	415-98-9487		F	Dane
8000060886	TESTUSER	CAPSPECIAL		12/15/1960	456-79-1257		M	Fond du Lac
9000059399	TESTUSER	EXTENDED		05/02/1974	541-23-6541		M	Kenosha
5000063155	TESTUSER	SADGERCARE		01/01/1922	584-88-9948		F	Milwaukee
8000063182	TESTUSER	MAWCDC		01/01/1947	544-86-4545		F	Milwaukee
9010000034	TESTUSER	CLAIMSPDL		01/01/1999	657-85-4599		F	Dane

1 2 3 Next >

If more than one member is returned in the search, one row can be selected by clicking on it. This will bring up the member information panel for the member selected.

iC Functionality - Member Information

The ‘*Member Information*’ screen includes the demographic information for the member, in the first two columns, as well as high level eligibility and other information. County Mental Health users should check the member’s demographic information, to ensure that the member is the same member that will be participating in the Community Recovery Services program. The following fields should also be noted by the County Mental Health users.

- **Member ID** – this is the interChange member ID that should be inserted on page 1 and page 2 of the “Potential Member Information for Community Recovery Services” worksheet in the “Member interChange ID” fields.
- **Active** – this indicates whether the Member ID that was entered is the active ID for this member. When a Member ID is linked to another Member ID, usually due to permanent demographic changes that assign a new MCI ID for the member, the old Member ID will display as Inactive.
- **Linked ID** – if the Member ID entered was inactivated, and linked to a new Member ID, then the new Member ID will display in this field (and the Active field will be “Inactive”).
- **Benefit Plan** – this is the high level member Medicaid, SSI MA, SSI payment or limited benefit plan eligibility information with eligibility begin and end dates. Benefit Plan(s) with an end date that is greater than the CRS application date, may be valid for CRS eligibility purposes. However, in order to determine whether or not a Benefit Plan is valid for CRS, the user will have to click on the “Benefit Plan” link in the maintenance menu below the Member Information.

Member Information

Member ID	5550102518	Name	TESTUSER, MARTHA	Active	Active
MCI Ind		Prev Name	WASHINGTON, MARTHA	Linked ID	
CARES Pin	0000000000	CARES Case	0000000000	Case History	5550102518 07/16/08
Medicare ID		Address		Benefit Plan	MAP 01/01/08-12/31/99
SSN	999-88-6666	Address 2	1100 N PENNSLYVANIA A'	Medicare Cov	
Gender	Female	Address 3		Managed Care	
Birth Date	07/07/1937	City	JANESVILLE	MC Special Cond	
Death Date		State	WI	TPL	No
Age	71	Zip	53546	Lockin	
Race	7 - Not Provided	Alt Address	No	NH Level of Care	
Ethnicity	09 Ethnicity Unknown	Phone		Patient Liability	
Language	UND - UNDETERMINED	Phone Type	No Phone	Deductible	
County	53 - Rock	Add Phone		Last HlthChk Scrn	
Tribal Ind		Add Type	No Phone	Last HlthChk Dntl	

Member Maintenance Select area to add or modify below.

Member [Benefit Plan](#) [Member ID Cards](#) [Member Review](#)

[Managed Care](#)
[Medicare](#)
[Previous Data](#)
[HealthCheck](#)
[SSI](#)

save cancel

iC Functionality – Member Maintenance Menu

The ‘*Member Maintenance*’ Menu is shown at the bottom of the Member Information screen. This allows the user access to more specific information for the member. By clicking on the ‘*Member*’ link on the left, which has been framed in red on the screen shot below, the user will be given sub-menu options to choose from.

After the County Mental Health users click on the ‘*Member*’ link, a sub-menu will display with several additional choices. County Mental Health users should click on the ‘*Benefits Plan*’ link to get to the detailed member Benefit Plan information, including the member’s valid medical status codes. (This link is also highlighted in red on the screenshot below.)

The screenshot displays the 'iC Functionality' interface for Member Information. At the top, there is a search bar with 'Next search by: Member ID' and 'Case Number' fields, along with 'search' and 'clear' buttons. Below this is the 'Member Information' section, which contains a grid of fields for member details. At the bottom, the 'Member Maintenance' menu is shown, with 'Member' and 'Benefit Plan' links highlighted in red. The 'Member' link is a dropdown menu, and 'Benefit Plan' is a direct link. Other links in the menu include 'Managed Care', 'Medicare', 'Previous Data', 'HealthCheck', and 'SSI'. The 'save' and 'cancel' buttons are also visible at the bottom of the menu.

Member Information		
Member ID	5550102518	Name TESTUSER, MARTHA
MCI Ind		Prev Name WASHINGTON, MARTHA
CARES Pin	0000000000	CARES Case 0000000000
Medicare ID		Address
SSN	999-88-6666	Address 2 1100 N PENNSLYVANIA A'
Gender	Female	Address 3
Birth Date	07/07/1937	City JANESVILLE
Death Date		State WI
Age	71	Zip 53546
Race	7 - Not Provided	Alt Address No
Ethnicity	09 Ethnicity Unknown	Phone
Language	UND - UNDETERMINED	Phone Type No Phone
County	53 - Rock	Add Phone
Tribal Ind		Add Type No Phone
Active	Active	Linked ID
Case History	5550102518 07/16/08	Benefit Plan MAP 01/01/08-12/31/99
Medicare Cov		Managed Care
MC Special Cond		TPL No
Lockin		NH Level of Care
Patient Liability		Deductible
Last HlthChk Scrn		Last HlthChk Dntf

Member Maintenance Select area to add or modify below. Print Bot

- Member**
- Managed Care
- Medicare
- Previous Data
- HealthCheck
- SSI

save cancel

County Mental Health users will have access to the ‘*Member*’ links on the ‘*Member Maintenance*’ menu.

iC Functionality - Member Benefit Plan Information

Clicking on 'Benefit Plan' will allow the user to view more detailed member eligibility information. All of the benefit plans that a member is or was eligible for will display. The user can select any of the rows of Benefit Plan information to view more detailed information for that specific Benefit Plan.

In the example below, for today's date of 10/30/09, the member has 4 Benefit Plans that are valid for today's date, the "SSIMA", "SI", "MCDW" and the "SIE" Benefit Plans. Of these Benefit Plans, two (SSIMA and MCDW) are valid Medicaid Benefit Plans for the CRS program, as noted in the Benefit Plan/Medical Status Code box on page 1 of the "Potential Member Information for Community Recovery Services" worksheet. So, in order to determine which medical status code is associated with this Benefit Plan for today's date, click on the SSIMA Benefit Plan row (highlighted below). The member's medical status code that is valid is "21" which is also in the list of valid medical status codes for the CRS program on page 1 of the worksheet.

The screenshot shows the 'Benefit Plan' information for a member. The browser window title is 'Information - Windows Internet Explorer provided by DHFS - State of Wisconsin'. The address bar shows the URL: https://ic.prod.healthcare.wi.local/IC/Member/Information/tabId/62/Default.aspx?sak_recipe=2373412. The page displays a table of benefit plans with columns for Benefit Plan, Status, Stop Reason, Plan Type, Financial Payer, Effective Date, End Date, and Worker ID. The first row, 'SSIMA Medicaid for SSI', is highlighted in blue and has a green arrow pointing to it. Below the table is a form for editing the selected benefit plan, with fields for Benefit Plan*, Status, Stop Reason, Plan Type, Financial Payer, Effective Date*, End Date*, and Worker ID. Below that is a section for 'Medical Status Code Data' with a table showing codes, effective dates, end dates, agencies, and sites. The first row in this table is '21 SSI, disabled, cat ndy' with an effective date of 08/01/2007 and an end date of 12/31/2299. Below this is another form for editing the medical status code, with fields for Medical Status Code*, Status*, Medical Status Code Effective Date*, Medical Status Code End Date*, and Agency.

Benefit Plan	Status	Stop Reason	Plan Type	Financial Payer	Effective Date	End Date	Worker ID
SSIMA Medicaid for SSI	Active		BNFT	1 Medicaid	08/01/2007	12/31/2299	003236
MCD Medicaid	Active	Benefit Plan Ended	BNFT	1 Medicaid	08/01/2001	07/31/2007	
SI State Supplemental Payment	Active		BNFT	4 Supplemental Security Income	11/01/2007	12/31/2299	
FC Family Care Non-MA	Active	Benefit Plan Ended	BNFT	1 Medicaid	01/01/2009	08/31/2009	XOZ060
MCDW Medicaid Waiver	Active	None	BNFT	1 Medicaid	01/01/2009	12/31/2009	XOZ060
SIE State Supplemental Paymen	Active		BNFT	4 Supplemental Security Income	01/01/2009	12/31/2299	

Medical Status Code	Medical Status Code Effective Date	Medical Status Code End Date	Agency	Site	Medical Status Code Status
21 SSI, disabled, cat ndy	08/01/2007	12/31/2299	Ozaukee - SSI MA / SSA	70	Active

This member also has one other valid Benefit Plan, MCDW, for the application date of 10/30/09, so in order to determine if there is another valid medical status code for the CRS program, the user should click on the MCDW Benefit Plan row. That will show that the medical status code associated with this Benefit Plan is “W5” which is also in the list of valid medical status codes for the CRS program on page 1 of the worksheet.

The screenshot displays a web application interface for managing benefit plans. The main table lists several benefit plans for a member. The 'MCDW Medicaid Waiver' row is highlighted in blue, and a green arrow points to it. Below the table, the details for this plan are shown, including 'Benefit Plan*', 'Status', 'Stop Reason', 'Plan Type', 'Financial Payer', and 'Worker ID'. A second table, '-Medical Status Code Data-', is also visible, with a green arrow pointing to the 'W5 SSI/Waiver, disabled' row. The details for this code are shown below it.

Benefit Plan	Status	Stop Reason	Plan Type	Financial Payer	Effective Date	End Date	Worker ID
SSIMA Medicaid for SSI	Active		BNFT	1 Medicaid	08/01/2007	12/31/2299	003236
MCD Medicaid	Active	Benefit Plan Ended	BNFT	1 Medicaid	08/01/2001	07/31/2007	
SI State Supplemental Payment	Active	Benefit Plan Ended	BNFT	4 Supplemental Security Income	11/01/2007	12/31/2299	
FC Family Care Non-MA	Active	Benefit Plan Ended	BNFT	1 Medicaid	01/01/2009	08/31/2009	XOZ060
MCDW Medicaid Waiver	Active	None	BNFT	1 Medicaid	01/01/2009	12/31/2009	XOZ060
SIE State Supplemental Paymen	Active		BNFT	4 Supplemental Security Income	01/01/2009	12/31/2299	

Medical Status Code	Medical Status Code	Medical Status Code	Agency	Site	Medical Status Code
Effective Date	End Date				Status
W5 SSI/Waiver, disabled	01/01/2009	12/31/2009	Ozaukee County DSS	00	Active

The “SI” and “SIE” Benefit Plans are not valid Benefit Plans for the CRS program. So, if the member only had one or both of these Benefit Plans, then s/he would not have the necessary Medicaid eligibility to participate in the CRS program.

Note: Member Benefit Plan and Medical Status Code information should be verified before each service that is provided by the CRS program to ensure that the member is eligible to participate in the CRS program.