



**Health Engagement and
Reporting Tool | HEART**

User Guide to the CCOP County Portal

December 2025

Version Information

| Version | Added or Updated Section(s) | Effective Date |
|---------|-----------------------------|----------------|
| 1.0 | N/A | |

Contents

- 1. Purpose and Intended Use 3
- 2. Logging in for the First Time 4
 - 2.1 Creating a MyWisconsin ID 4
 - 2.2 Logging in 10
 - 2.3 Submitting an Access Request Form 12
- 3. Navigating the County Portal 14
 - 3.1 Service Expense Page 16
 - 3.1.1 Service Expenses List Views 16
 - 3.1.2 Creating a Service Expense – Selecting a Participant 17
 - 3.1.3 Creating a Service Expense – Create New Participant 19
 - 3.2 Provider Page 22
 - 3.2.1 Creating a Provider Record 22
 - 3.3 Budget Page 24
 - 3.4 Reconciliation Page 25
 - 3.4.1 Working with Reconciliation Forms 25
 - 3.4.2 Reconciliation Form Tab 26
 - 3.4.3 County Admin Review Process 31
 - 3.4.4 Adding Comments as County Admins 34
 - 3.5 Access Request Page 35
 - 3.6 Reports Page 36
 - 3.6.1 Managing Reports 38
- 4. FAQs and Support Information 39

1. Purpose and Intended Use

This document serves as a comprehensive guide for county users on accessing and effectively using the CCOP County Portal.

Note: The images in this guide are from a test environment and are for illustrative purposes only. The information shown does not represent live data.

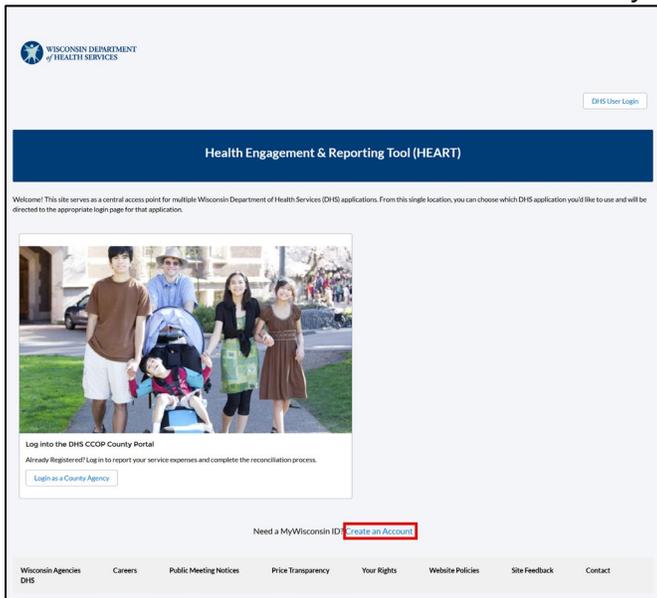
2. Logging in for the First Time

County users must have a MyWisconsin ID to access the CCOP County Portal. Those Users who do not already have a MyWisconsin ID must create one before proceeding.

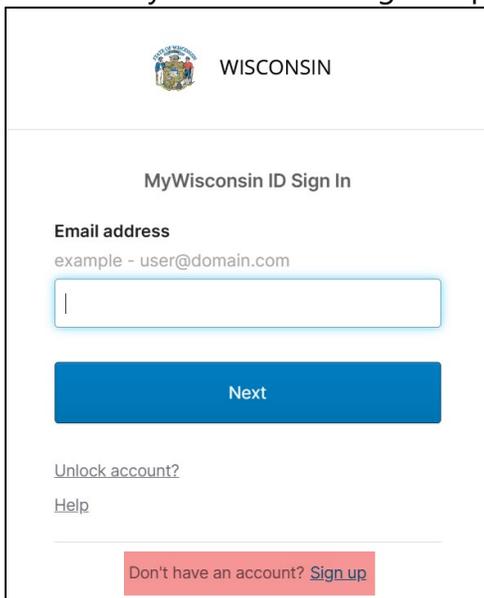
If you already have a MyWisconsin ID, please refer to section 2.2 in this document.

2.1 Creating a MyWisconsin ID

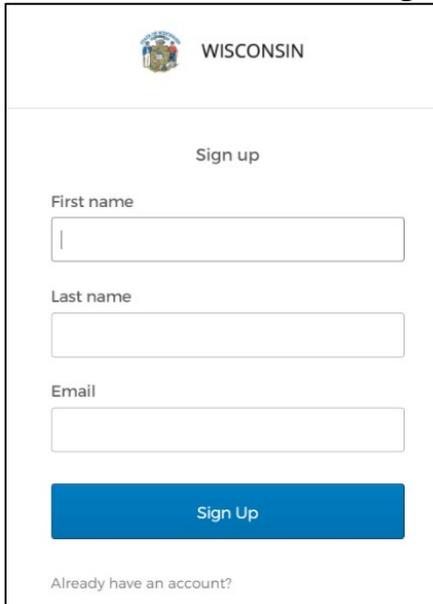
1. Go to the landing page at <https://bfamboss.my.site.com/HEART/s/landing> and select **Create an Account** next to “Need a MyWisconsin ID?”



2. On the “MyWisconsin ID Sign In” page, select **Sign up**.

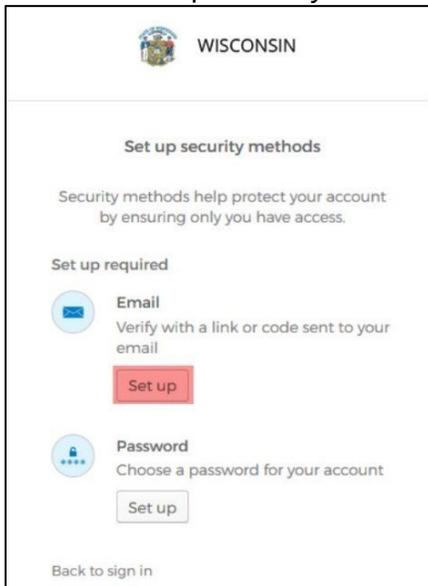


3. On the "Sign up" page, enter a first name, last name, and a **non-State** (DHS) email address; then select **Sign Up**.



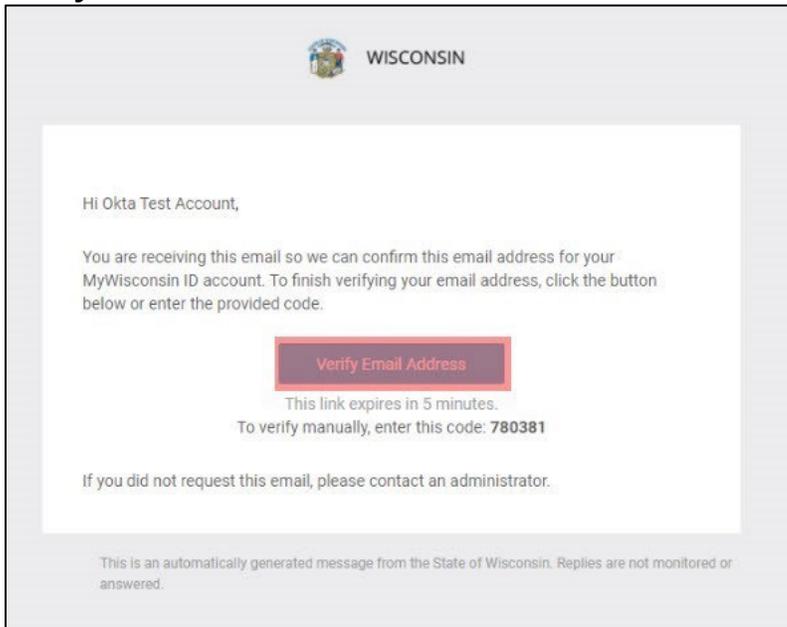
The screenshot shows the WISCONSIN Sign up page. At the top left is the Wisconsin state seal and the word "WISCONSIN". Below this is the heading "Sign up". There are three input fields: "First name", "Last name", and "Email". Below the "Email" field is a blue "Sign Up" button. At the bottom left, there is a link that says "Already have an account?".

4. On the "Set up security methods" page, select **Set up** under Email.

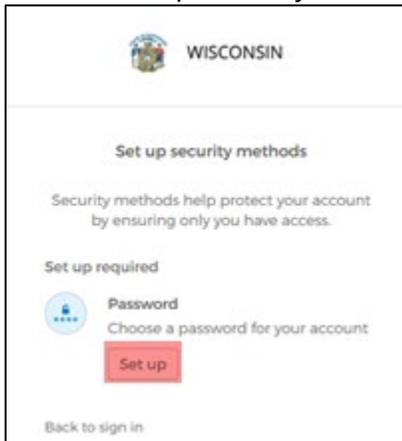


The screenshot shows the WISCONSIN "Set up security methods" page. At the top left is the Wisconsin state seal and the word "WISCONSIN". Below this is the heading "Set up security methods". A sub-heading reads "Set up security methods". Below that is a paragraph: "Security methods help protect your account by ensuring only you have access." Underneath is the section "Set up required". There are two options: "Email" (with an envelope icon) and "Password" (with a lock icon). The "Email" option includes the text "Verify with a link or code sent to your email" and a red "Set up" button. The "Password" option includes the text "Choose a password for your account" and a grey "Set up" button. At the bottom left, there is a link that says "Back to sign in".

5. Open the email entered in Step 3, check for the verification email, and select **Verify Email Address**.



6. In the "Set up security methods" page, select **Set up** under Password.



7. Enter a unique password in the "Set up password" page, re-enter it, and select **Next**.



WISCONSIN



Set up password

Password requirements:

- At least 16 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- No parts of your username
- Does not include your first name
- Does not include your last name
- Your password cannot be any of your last 24 passwords
- At least 2 hour(s) must have elapsed since you last changed your password

Enter password

Re-enter password

Next

[Back to sign in](#)

8. On the “Set up security methods” page, choose a multifactor authentication (MFA) method. Be sure to confirm access to the MFA device before choosing.



WISCONSIN

Set up security methods

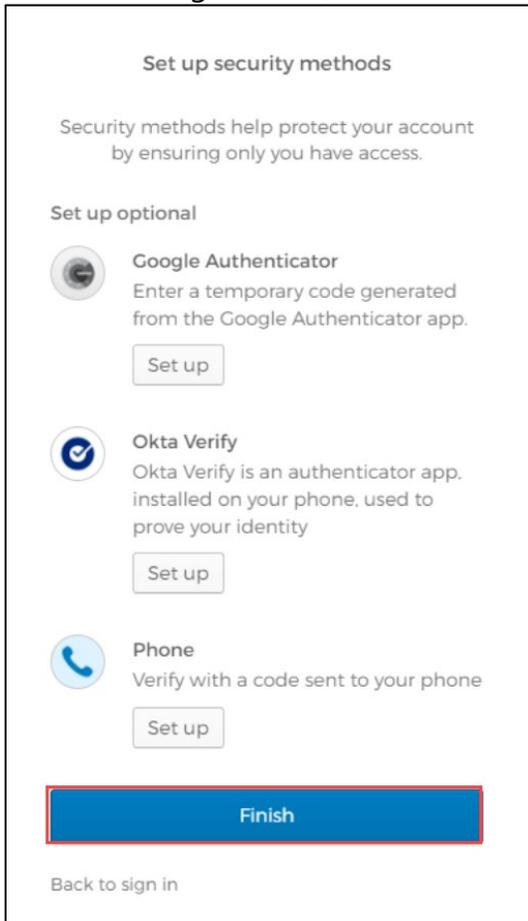
Security methods help protect your account by ensuring only you have access.

Set up required

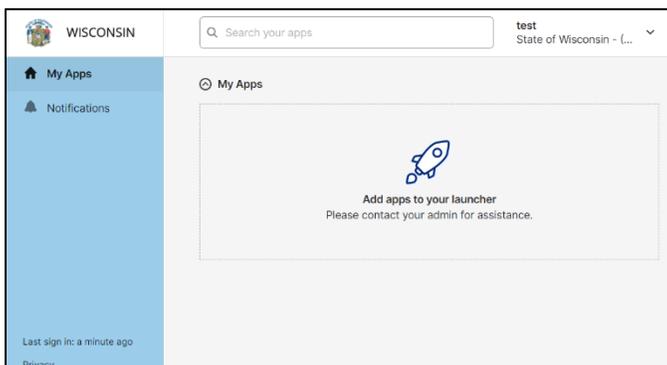
- **Google Authenticator**
Enter a temporary code generated from the Google Authenticator app.
- **Okta Verify**
Okta Verify is an authenticator app, installed on your phone, used to prove your identity
- **Phone**
Verify with a code sent to your phone
- **Security Key or Biometric Authenticator**
Use a security key or a biometric authenticator to sign in

[Back to sign in](#)

9. After choosing an MFA, select **Finish**.



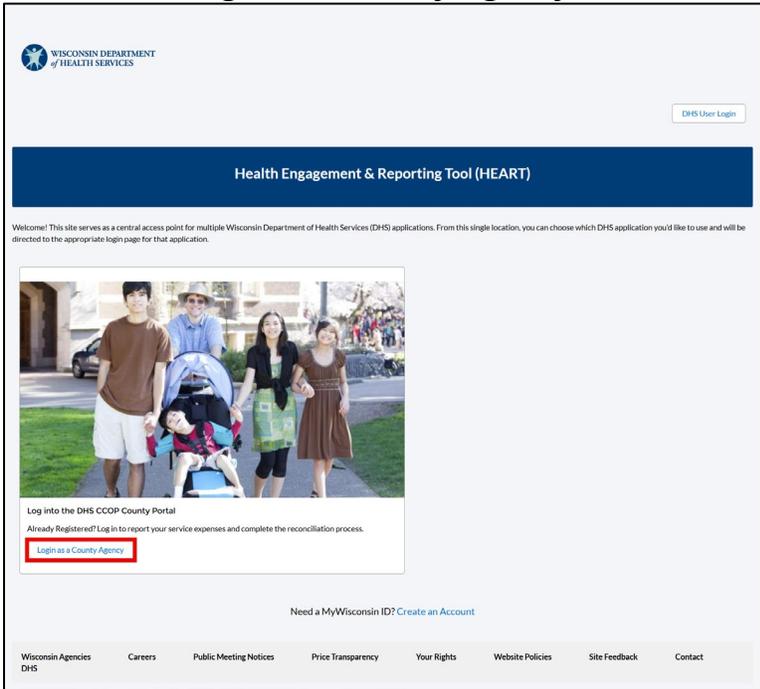
This will complete the setup of the MyWisconsin ID account registration. Close the My Apps dashboard and log in to the CCOP County Portal



Note: Contact the MyWisconsin ID Account Service Desk at 608-471-6667 if you experience any issue setting up your MyWisconsin ID and password.

2.2 Logging in

1. Go to the landing page at <https://bfamboss.my.site.com/HEART/s/landing> and select **Login as a County Agency**.

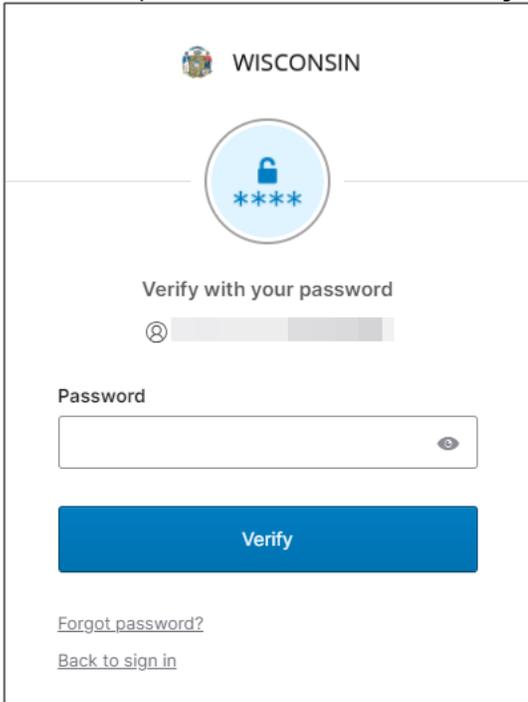


Note: If your browser has an open MyWisconsin ID session, you will go directly to the CCOP County Portal home page without being prompted to log in (Steps 2-5).

2. Enter the MyWisconsin ID.

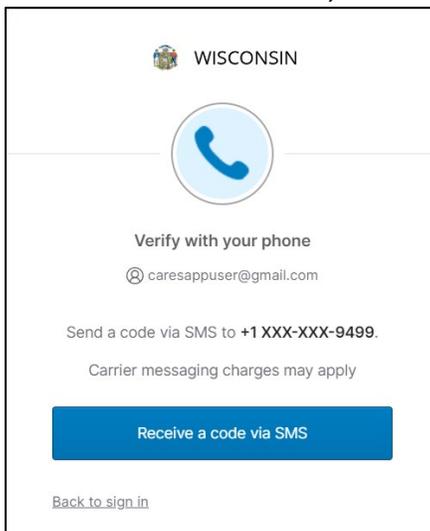
The screenshot shows the "MyWisconsin ID Sign In" page. At the top is the Wisconsin state seal and the word "WISCONSIN". The page title is "MyWisconsin ID Sign In". Below this is the "Email address" label and a text input field containing "example - user@domain.com". A blue "Next" button is positioned below the input field. At the bottom of the form, there are links for "Unlock account?", "Help", and "Don't have an account? Sign up".

3. Enter the password and select **Verify**.



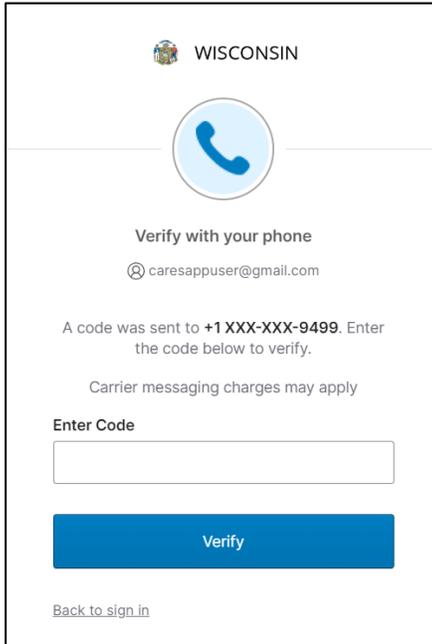
The screenshot shows the WISCONSIN login interface. At the top is the WISCONSIN logo. Below it is a circular icon with a blue padlock and four asterisks. The text "Verify with your password" is centered. Underneath is a greyed-out email field with a person icon. Below that is a "Password" label and an empty password input field with a toggle eye icon. A large blue "Verify" button is centered below the password field. At the bottom left, there are two links: "Forgot password?" and "Back to sign in".

4. Select **Receive a code** (this will be based on the user's configured Multi-Factor Authentication method).



The screenshot shows the WISCONSIN login interface for phone verification. At the top is the WISCONSIN logo. Below it is a circular icon with a blue telephone handset. The text "Verify with your phone" is centered. Underneath is a greyed-out email field with a person icon and the text "caresappuser@gmail.com". Below that is the text "Send a code via SMS to +1 XXX-XXX-9499." and "Carrier messaging charges may apply". A large blue button labeled "Receive a code via SMS" is centered below the text. At the bottom left, there is a link "Back to sign in".

5. Enter the code from the MFA method you choose and select **Verify**.



WISCONSIN

Verify with your phone

caresappuser@gmail.com

A code was sent to +1 XXX-XXX-9499. Enter the code below to verify.

Carrier messaging charges may apply

Enter Code

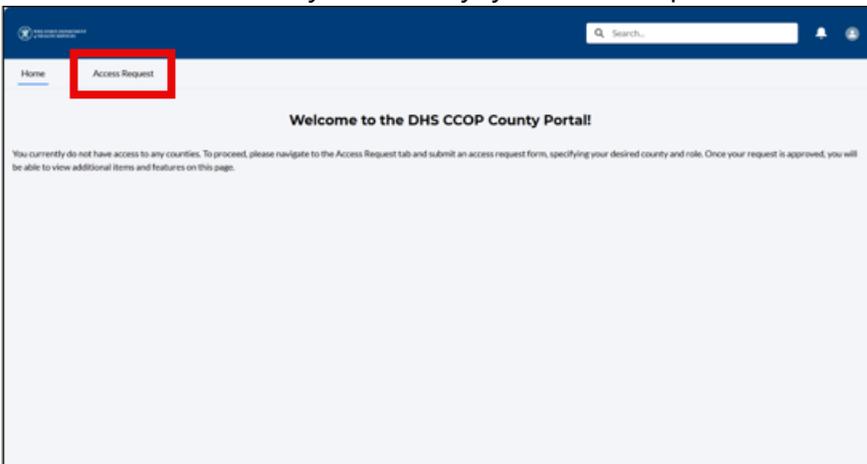
Verify

[Back to sign in](#)

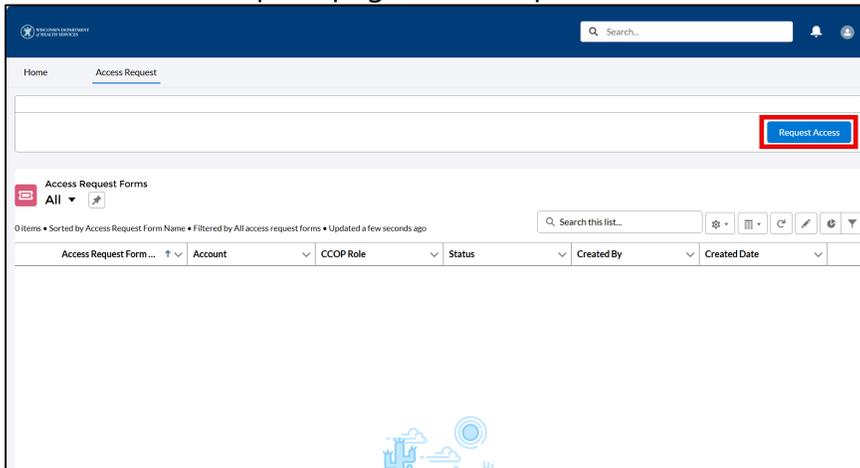
6. If the authentication is successful, you will be directed to the County Portal Home page.

2.3 Submitting an Access Request Form

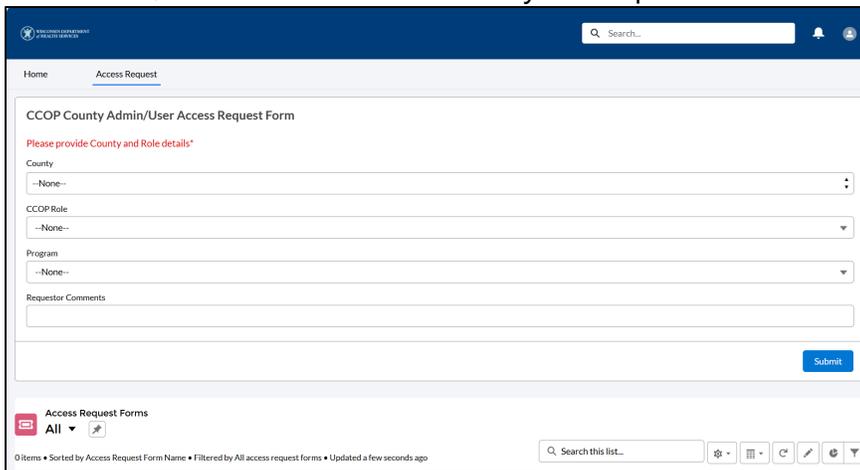
When you log into the portal for the first time, you will see the following screen. To view information related to your county, you must request access to it.



1. On the Access Request page, click Request Access.



2. In the form, select the appropriate county, role, and program. Add any Requestor Comments, and click Submit to send your request.



There are two roles to choose from: County Admin and County User. County Admins are approved by DHS and can authorize access requests for other county users in their county. County Users perform county-specific tasks and are approved by their local County Admin.

| Role | Responsibilities | Approved By |
|---------------------|---|--------------------|
| County Admin | Authorize access requests for other county users in their county as well as perform county specific tasks | DHS |
| County User | Perform county specific tasks | Local County Admin |

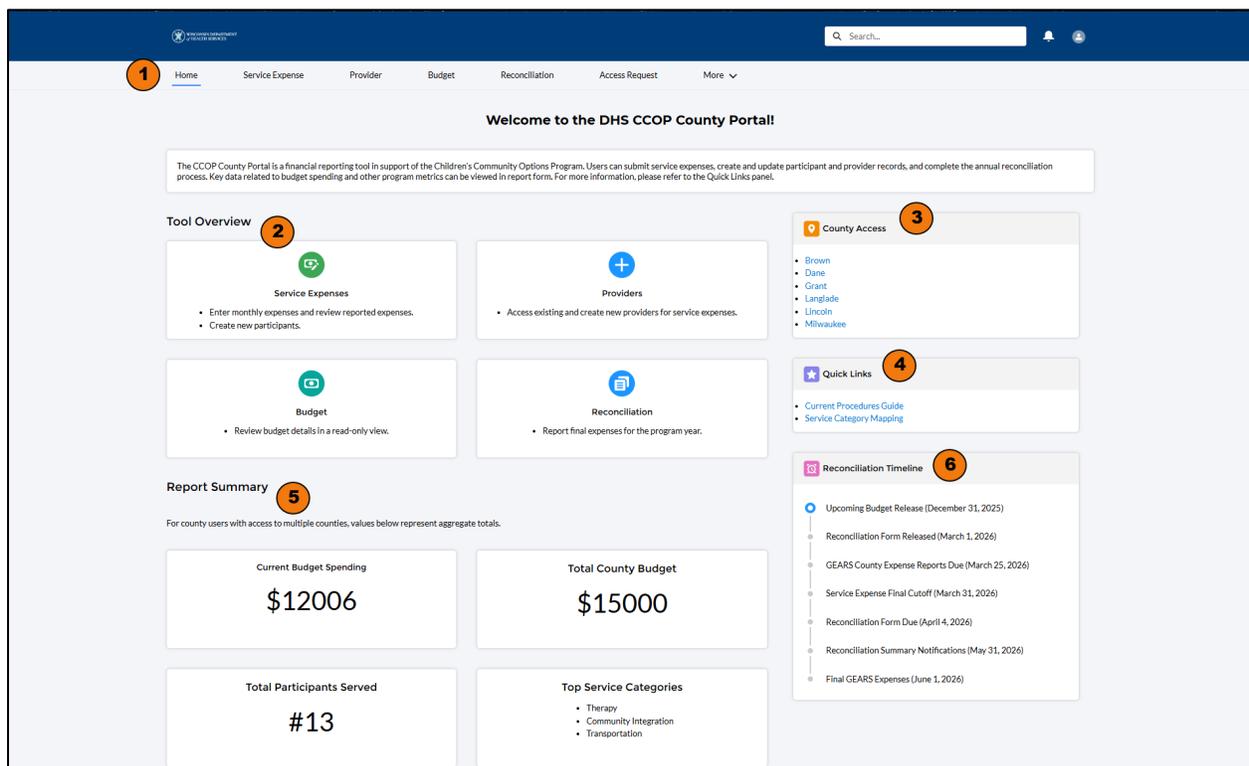
Before any other users can be approved, each county must first identify and request access for a County Admin.

After you submit your request, it will be reviewed for approval. Once a County Admin is approved, they can approve access requests for additional county users. You'll receive an email notification once your access has been approved. After receiving this notification, you can access the portal and view information related to your county.

3. Navigating the County Portal

The Home page serves as the central location for county users to monitor their CCOP activities. From here, you can access service expenses, providers, participants, budgets, reconciliation forms, and manage your access requests.

The navigation bar at the top of the screen contains the following pages: **Home, Service Expense, Provider, Budget, Reconciliation, Access Request, and More.** Click any menu item to navigate directly to that page.



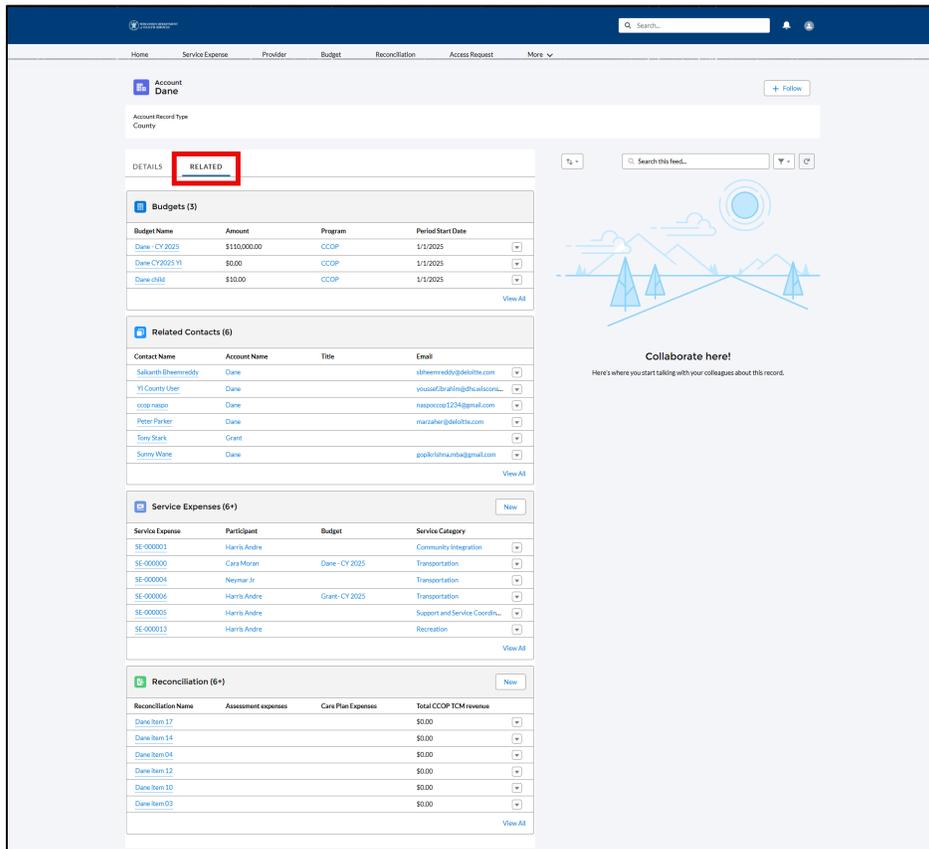
1. **Navigation Bar** - The menu located at the top of the screen that provides access to various pages in the system.

2. **Tool Overview** - This section highlights core CCOP tasks such as tracking expenses, managing providers, viewing budgets, and completing reconciliations.

- County Access** – Offers quick links to a county's account page. The 'Related' tab displays a list of all records associated with that county that the user can access. Most users will have access to only one county.
- Quick Links** - Shortcuts to help docs and reference resources for common tasks.
- Report Summary** - Snapshot of key county metrics. Selecting any frame in this section will open its report record.
- Reconciliation Timeline** - Key dates for budget release, forms, cutoffs, and final reports to guide reconciliation milestones.

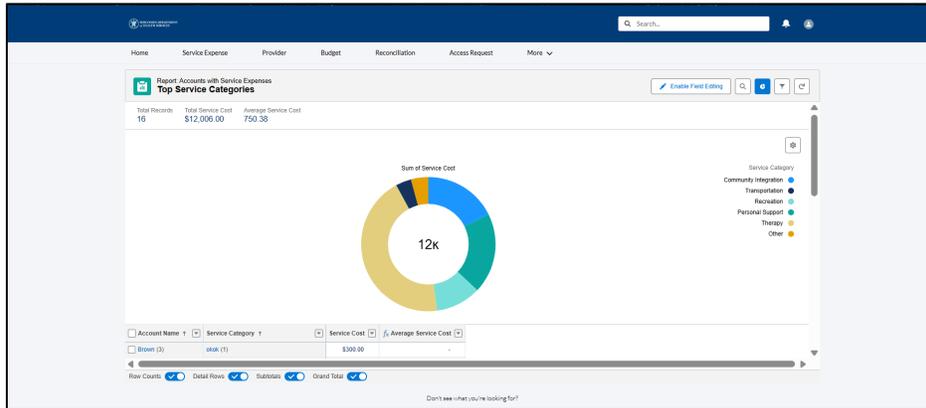
Additional details for County Access (#3):

The Related tab on a county record displays a list of all records associated with that county that the user can access. Most users will have access to only one county.



Additional details for Report Summary (#5):

Selecting any frame in the Report Summary section will open the corresponding report record. In this example, opening a report displays both a chart and a table associated with that report.



3.1 Service Expense Page

The Service Expenses page displays documentation of services provided to children and their associated costs. County users can create new service expense records and track their submission status.

3.1.1 Service Expenses List Views

List views are lists of filtered records in a table format allowing users to view and manage data based on specific criteria. Use these to make finding records easier in categories.

The list view "pin" is a feature that allows you to quickly access your preferred list view. When you pin a list view (pin icon turned down), it saves your current view configuration so you can return to that list view when you leave the page.

Service Expenses

16 Items • Sorted by Service Expense • Filtered by All service expenses • Updated a few seconds ago

| | Service Expense | Budget | Participant | Provider | Service Category | Service St... | Service En... | Service ... |
|----|-----------------|-----------------|-----------------|----------|----------------------------------|---------------|---------------|-------------|
| 1 | SE-000028 | | Emma Johnson | | okok | 10/4/2025 | 10/24/20... | \$300.00 |
| 2 | SE-000027 | | | | Recreation | 10/20/20... | 11/2/2025 | \$967.00 |
| 3 | SE-000024 | Grant - CY 2025 | | P-000... | Community Integration | 10/23/20... | 10/23/20... | \$123.00 |
| 4 | SE-000023 | | Neymar Jr | P-000... | Community Integration | 10/24/20... | 10/25/20... | \$1.00 |
| 5 | SE-000022 | Grant - CY 2025 | | P-000... | Consumer and Family-Directed ... | 10/23/20... | 10/23/20... | \$1.00 |
| 6 | SE-000017 | | Harris Andre | P-000... | Offsets | 10/22/20... | 10/22/20... | \$100.00 |
| 7 | SE-000013 | | Harris Andre | P-000... | Recreation | 10/21/20... | 12/30/20... | \$321.00 |
| 8 | SE-000012 | Grant - CY 2025 | Lara Eve Frazer | P-000... | Personal Support | 10/21/20... | 12/3/2025 | \$2,323... |
| 9 | SE-000010 | Grant - CY 2025 | Cara Moran | P-000... | Therapy | 10/5/2025 | 10/30/20... | \$300.00 |
| 10 | SE-000006 | Grant - CY 2025 | Harris Andre | P-000... | Transportation | 10/9/2025 | 10/9/2025 | \$100.00 |
| 11 | SE-000005 | | Harris Andre | P-000... | Support and Service Coordinat... | 10/9/2025 | 10/9/2025 | \$100.00 |
| 12 | SE-000004 | | Neymar Jr | P-000... | Transportation | 10/6/2025 | 10/7/2025 | \$250.00 |
| 13 | SE-000003 | Dane - CY 2025 | Cara Moran | P-000... | Therapy | 6/18/2025 | 6/18/2025 | \$1,000... |
| 14 | SE-000002 | Brown - CY 2025 | Camille S Snow | P-000... | Therapy | 1/13/2025 | 6/24/2025 | \$4,000... |
| 15 | SE-000001 | | Harris Andre | P-000... | Community Integration | 8/5/2025 | 10/22/20... | \$2,000... |
| 16 | SE-000000 | Dane - CY 2025 | Cara Moran | P-000... | Transportation | 10/8/2025 | 10/15/20... | \$100.00 |

3.1.2 Creating a Service Expense – Selecting a Participant

1. On the Service Expenses page, click the **New** button.

Service Expenses

16 Items • Sorted by Service Expense • Filtered by All service expenses • Updated a few seconds ago

| | Service Expense | Budget | Participant | Provider | Service Category | Service St... | Service En... | Service ... |
|----|-----------------|-----------------|-------------|----------|----------------------------------|---------------|---------------|-------------|
| 1 | SE-000028 | | | | okok | 10/4/2025 | 10/24/20... | \$300.00 |
| 2 | SE-000027 | | | | Recreation | 10/20/20... | 11/2/2025 | \$967.00 |
| 3 | SE-000024 | Grant - CY 2025 | | P-000... | Community Integration | 10/23/20... | 10/23/20... | \$123.00 |
| 4 | SE-000023 | | | P-000... | Community Integration | 10/24/20... | 10/25/20... | \$1.00 |
| 5 | SE-000022 | Grant - CY 2025 | | P-000... | Consumer and Family-Directed ... | 10/23/20... | 10/23/20... | \$1.00 |
| 6 | SE-000017 | | | P-000... | Offsets | 10/22/20... | 10/22/20... | \$100.00 |
| 7 | SE-000013 | | | P-000... | Recreation | 10/21/20... | 12/30/20... | \$321.00 |
| 8 | SE-000012 | Grant - CY 2025 | | P-000... | Personal Support | 10/21/20... | 12/3/2025 | \$2,323... |
| 9 | SE-000010 | Grant - CY 2025 | | P-000... | Therapy | 10/5/2025 | 10/30/20... | \$300.00 |
| 10 | SE-000006 | Grant - CY 2025 | | P-000... | Transportation | 10/9/2025 | 10/9/2025 | \$100.00 |
| 11 | SE-000005 | | | P-000... | Support and Service Coordinat... | 10/9/2025 | 10/9/2025 | \$100.00 |
| 12 | SE-000004 | | | P-000... | Transportation | 10/6/2025 | 10/7/2025 | \$250.00 |
| 13 | SE-000003 | Dane - CY 2025 | | P-000... | Therapy | 6/18/2025 | 6/18/2025 | \$1,000... |
| 14 | SE-000002 | Brown - CY 2025 | | P-000... | Therapy | 1/13/2025 | 6/24/2025 | \$4,000... |
| 15 | SE-000001 | | | P-000... | Community Integration | 8/5/2025 | 10/22/20... | \$2,000... |
| 16 | SE-000000 | Dane - CY 2025 | | P-000... | Transportation | 10/8/2025 | 10/15/20... | \$100.00 |

2. Enter the participant's first and last name and associated MCI ID, then click **Next**.

| | Service Expense | Budget | Participant | Provider | Service Category | Service St... | Service En... | Service ... |
|---|------------------------------------|-------------------|-------------|----------|------------------------|---------------|---------------|-------------|
| 1 | <input type="checkbox"/> SE-000055 | Brown- CY 2025 | | P-00005 | Personal Support | 11/14/20... | 11/14/20... | \$300.00 |
| 2 | <input type="checkbox"/> SE-000054 | Brown- CY 2025 | | P-00005 | Personal Support | 11/13/20... | 11/13/20... | \$200.00 |
| 3 | <input type="checkbox"/> SE-000053 | North Central ... | | P-00002 | Personal Support | 11/12/20... | 11/12/20... | \$200.00 |
| 4 | <input type="checkbox"/> SE-000052 | Grant- CY 2025 | | P-00005 | Personal Support | 11/12/20... | 11/12/20... | \$200.00 |
| 5 | <input type="checkbox"/> SE-000051 | Grant- CY 2025 | | P-00000 | Children's Foster Care | 11/10/20... | 11/10/20... | \$1.00 |
| | <input type="checkbox"/> SE-000050 | Brown- CY 2025 | | P-00000 | Recreation | 11/10/20... | 11/10/20... | \$1.00 |

Once the participant is discovered in the system, select the radio button next to the participant's name and select **Choose Participant**.

| | Service Expense | Budget | Participant | Provider | Service Category | Service St... | Service En... | Service ... |
|---|------------------------------------|----------------|-------------|----------|-----------------------|---------------|---------------|-------------|
| 1 | <input type="checkbox"/> SE-000002 | Brown- CY 2025 | | P-00003 | Therapy | 1/13/2025 | 6/24/2025 | \$4,000.00 |
| 2 | <input type="checkbox"/> SE-000000 | Dane- CY 2025 | | P-00002 | Transportation | 10/8/2025 | 10/15/20... | \$100.00 |
| 3 | <input type="checkbox"/> SE-000003 | Dane- CY 2025 | | P-00002 | Therapy | 6/18/2025 | 6/18/2025 | \$1,000.00 |
| 4 | <input type="checkbox"/> SE-000010 | Grant- CY 2025 | | P-00000 | Therapy | 10/5/2025 | 10/30/20... | \$300.00 |
| 5 | <input type="checkbox"/> SE-000059 | Brown- CY 2025 | | P-00004 | Utilities | 12/8/2025 | 12/31/20... | \$50.00 |
| 6 | <input type="checkbox"/> SE-000024 | Grant- CY 2025 | | P-00000 | Community Integration | 10/23/20... | 10/23/20... | \$122.00 |
| 7 | <input type="checkbox"/> SE-000021 | Dane- CY 2025 | | P-00011 | Child Care | 10/27/20... | 10/30/20... | \$122.00 |
| 8 | <input type="checkbox"/> SE-000028 | | | P-00011 | okok | 10/4/2025 | 10/24/20... | \$300.00 |

Begin by selecting an existing provider. Then, choose the appropriate account (county) and service category from the dropdown menus. Input a service description, the start and end dates, and the service cost. **Note:** Service expense dates should be typed as 'mm/dd/yyyy' or selected using the calendar feature.

Service Expense

Participant: Holly Jay

* Provider: Search Providers by Name or Number...

* Service Description: [Input Field]

* Service End Date: [Input Field]

* Account: Search Accounts... [Input Field]

* Service Category: --None-- [Dropdown]

* Service Start Date: [Input Field]

* Service Cost: [Input Field]

Submit

Service Expenses: All

23 items • Sorted by Service Expense • Filtered by All service expenses • Updated 10 minutes ago

| | Service Expense | Budget | Participant | Provider | Service Category | Service St... | Service En... | Service... |
|---|-----------------|------------------|--------------|----------|------------------|---------------|---------------|------------|
| 1 | SE-000055 | Brown - CY 2025 | | P-00005 | Personal Support | 11/14/20... | 11/14/20... | \$300.00 |
| 2 | SE-000054 | Brown - CY 2025 | Holly Harris | P-00005 | Personal Support | 11/13/20... | 11/13/20... | \$200.00 |
| 3 | SE-000053 | North Central... | Holly Jay | P-00002 | Personal Support | 11/12/20... | 11/12/20... | \$200.00 |
| 4 | SE-000052 | Grant - CY 2025 | Harris Andre | P-00005 | Personal Support | 11/12/20... | 11/12/20... | \$200.00 |

Click **Submit** to save the record and submit to DHS. Service expenses are submitted against your county's annual budget. Click 'Home' to navigate back to the main page.

Service Expense SE-000059 Edit

DETAILS RELATED

Service Expense: SE-000059

Participant: [Input Field]

Account: Brown

Provider: [Input Field]

Budget: Brown - CY 2025

Created By: Peter Parker, 12/5/2025, 9:18 AM

Service Category: Utilities

Service Description: Test

Service Cost: \$50.00

Service Start Date: 12/8/2025

Service End Date: 12/31/2025

Last Modified By: Peter Parker, 12/5/2025, 9:18 AM

3.1.3 Creating a Service Expense – Create New Participant

1. On the Service Expenses page, click the **New** button.

Home Service Expense Provider Budget Reconciliation Access Request More

Search...

New

Service Expenses
All

16 items • Sorted by Service Expense • Filtered by All service expenses • Updated a few seconds ago

Search this list...

| | Service Expense # | Budget | Participant | Provider | Service Category | Service St... | Service En... | Service ... |
|----|-------------------|-----------------|-------------|----------|----------------------------------|---------------|---------------|-------------|
| 1 | SE-000020 | | | | ekok | 10/4/2025 | 10/24/20... | \$300.00 |
| 2 | SE-000027 | | | | Recreation | 10/20/20... | 11/2/2025 | \$987.00 |
| 3 | SE-000024 | Grant - CY 2025 | | P-000... | Community Integration | 10/23/20... | 10/23/20... | \$123.00 |
| 4 | SE-000023 | | | P-000... | Community Integration | 10/24/20... | 10/25/20... | \$1.00 |
| 5 | SE-000022 | Grant - CY 2025 | | P-000... | Consumer and Family Directed ... | 10/23/20... | 10/23/20... | \$1.00 |
| 6 | SE-000017 | | | P-000... | Offsets | 10/22/20... | 10/22/20... | \$100.00 |
| 7 | SE-000013 | | | P-000... | Recreation | 10/21/20... | 12/30/20... | \$321.00 |
| 8 | SE-000012 | Grant - CY 2025 | | P-000... | Personal Support | 10/21/20... | 12/3/2025 | \$2,323... |
| 9 | SE-000010 | Grant - CY 2025 | | P-000... | Therapy | 10/5/2025 | 10/30/20... | \$300.00 |
| 10 | SE-000006 | Grant - CY 2025 | | P-000... | Transportation | 10/9/2025 | 10/9/2025 | \$100.00 |
| 11 | SE-000005 | | | P-000... | Support and Service Coordinat... | 10/9/2025 | 10/9/2025 | \$100.00 |
| 12 | SE-000004 | | | P-000... | Transportation | 10/6/2025 | 10/7/2025 | \$250.00 |
| 13 | SE-000003 | Dane - CY 2025 | | P-000... | Therapy | 6/18/2025 | 6/18/2025 | \$1,000... |
| 14 | SE-000002 | Brown - CY 2025 | | P-000... | Therapy | 1/13/2025 | 6/24/2025 | \$4,000... |
| 15 | SE-000001 | | | P-000... | Community Integration | 8/5/2025 | 10/22/20... | \$2,000... |
| 16 | SE-000000 | Dane - CY 2025 | | P-000... | Transportation | 10/8/2025 | 10/15/20... | \$100.00 |

2. Enter the participant's first and last name and associated MCI ID. If the individual is a new participant, continue to click **Next**.

Home Service Expense Provider Budget Reconciliation Access Request More

Search...

Select Participant

* First Name

* Last Name

* MCI ID

Next

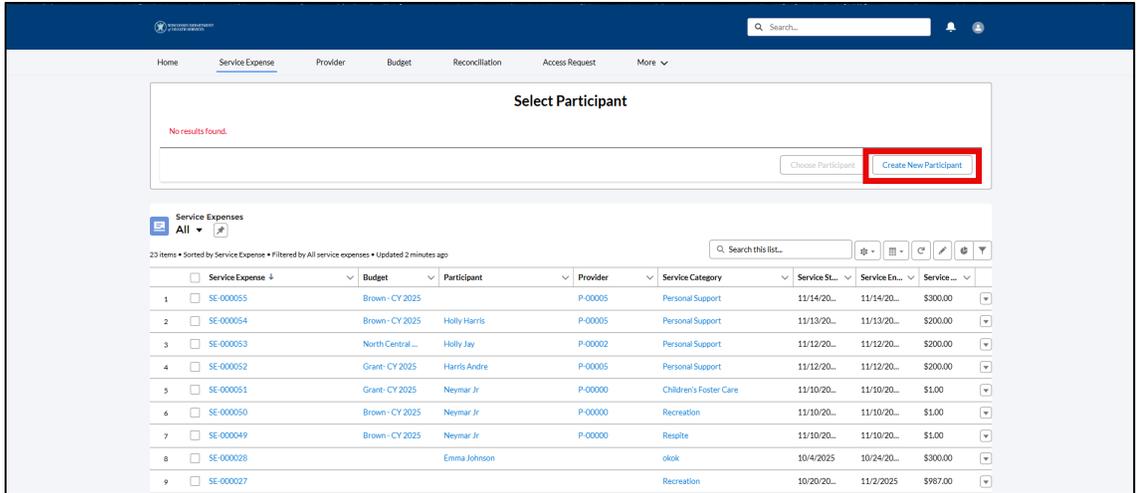
Service Expenses
All

23 items • Sorted by Service Expense • Filtered by All service expenses • Updated a few seconds ago

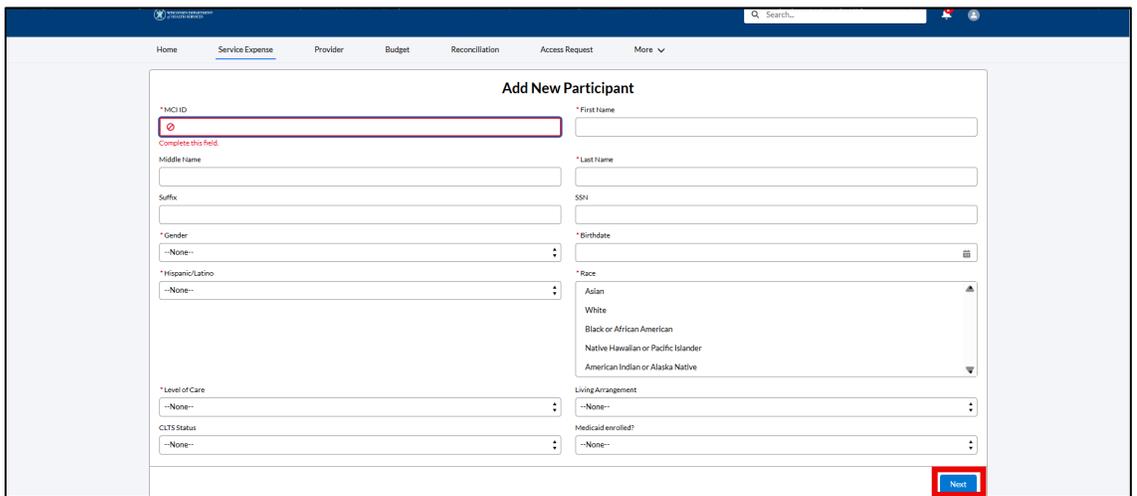
Search this list...

| | Service Expense # | Budget | Participant | Provider | Service Category | Service St... | Service En... | Service ... |
|---|-------------------|-------------------|-------------|----------|------------------------|---------------|---------------|-------------|
| 1 | SE-000055 | Brown - CY 2025 | | P-00005 | Personal Support | 11/14/20... | 11/14/20... | \$300.00 |
| 2 | SE-000054 | Brown - CY 2025 | | P-00005 | Personal Support | 11/13/20... | 11/13/20... | \$200.00 |
| 3 | SE-000053 | North Central ... | | P-00002 | Personal Support | 11/12/20... | 11/12/20... | \$200.00 |
| 4 | SE-000052 | Grant - CY 2025 | | P-00005 | Personal Support | 11/12/20... | 11/12/20... | \$200.00 |
| 5 | SE-000051 | Grant - CY 2025 | | P-00000 | Children's Foster Care | 11/10/20... | 11/10/20... | \$1.00 |
| 6 | SE-000050 | Brown - CY 2025 | | P-00000 | Recreation | 11/10/20... | 11/10/20... | \$1.00 |

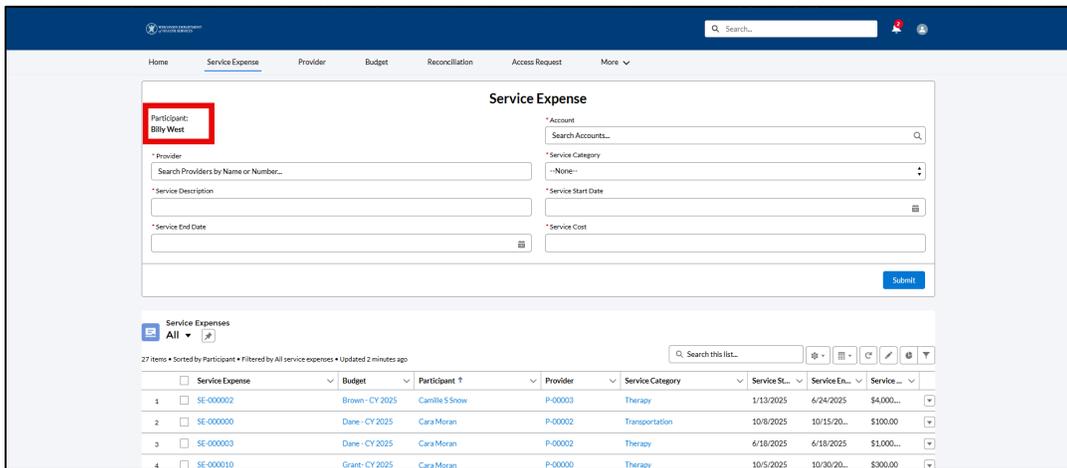
3. The system will acknowledge there are no records for the newly typed in data and prompt the user to create the participant record. Click **Create New Participant**.



4. Fill out the participant fields and click **Next**.



The system will return the user back to the Service Expense edit page with the new participant highlighted in the left-hand corner.

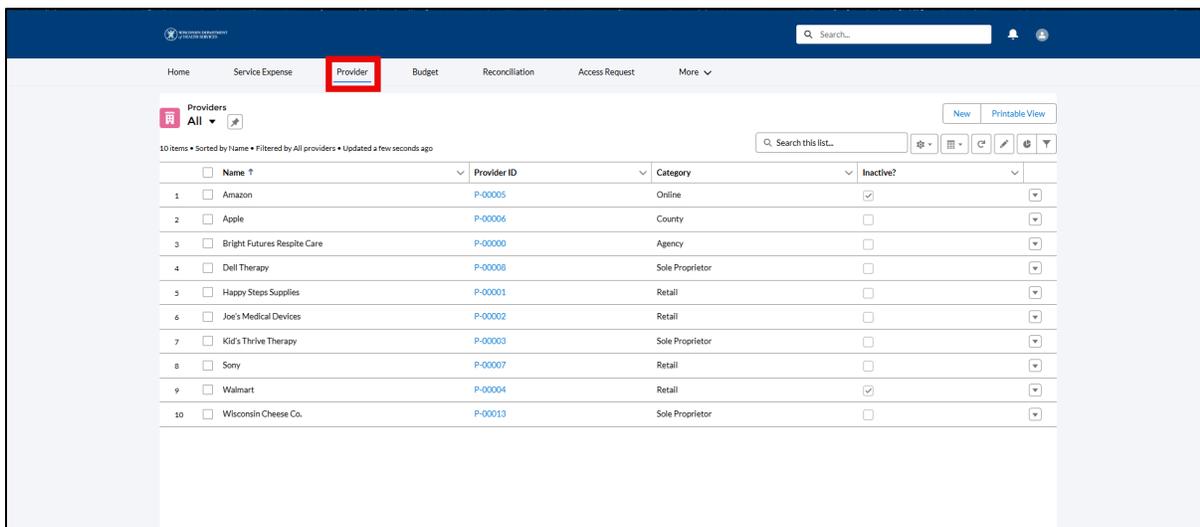


5. Continue with creating the Service Expense record by choosing the appropriate account (county) and service category from the dropdown menus. Input a service description, the start and end dates, and the service cost. **Note:** Service expense dates should be typed as 'mm/dd/yyyy' or selected using the calendar feature.

6. Click **Submit** to save the record and submit it to DHS. Click 'Home' to navigate back to the main page.

3.2 Provider Page

The Provider page displays all service providers entered by county users. You can view existing providers and create new provider records as needed.



| <input type="checkbox"/> | Name ↑ | Provider ID | Category | Inactive? |
|--------------------------|--|-------------|-----------------|-------------------------------------|
| 1 | <input type="checkbox"/> Amazon | P-00005 | Online | <input checked="" type="checkbox"/> |
| 2 | <input type="checkbox"/> Apple | P-00006 | Country | <input type="checkbox"/> |
| 3 | <input type="checkbox"/> Bright Futures Respite Care | P-00000 | Agency | <input type="checkbox"/> |
| 4 | <input type="checkbox"/> Dell Therapy | P-00008 | Sole Proprietor | <input type="checkbox"/> |
| 5 | <input type="checkbox"/> Happy Steps Supplies | P-00001 | Retail | <input type="checkbox"/> |
| 6 | <input type="checkbox"/> Joe's Medical Devices | P-00002 | Retail | <input type="checkbox"/> |
| 7 | <input type="checkbox"/> Kid's Thrive Therapy | P-00003 | Sole Proprietor | <input type="checkbox"/> |
| 8 | <input type="checkbox"/> Sony | P-00007 | Retail | <input type="checkbox"/> |
| 9 | <input type="checkbox"/> Walmart | P-00004 | Retail | <input checked="" type="checkbox"/> |
| 10 | <input type="checkbox"/> Wisconsin Cheese Co. | P-00013 | Sole Proprietor | <input type="checkbox"/> |

3.2.1 Creating a Provider Record

To create a new provider, click the **New** button on the Provider page.

Providers

All

10 items • Sorted by Name • Filtered by All providers • Updated a few seconds ago

| | Name ↑ | Provider ID | Category | Inactive? |
|----|--|-------------|-----------------|-------------------------------------|
| 1 | <input type="checkbox"/> Amazon | P-00005 | Online | <input checked="" type="checkbox"/> |
| 2 | <input type="checkbox"/> Apple | P-00006 | County | <input type="checkbox"/> |
| 3 | <input type="checkbox"/> Bright Futures Respite Care | P-00000 | Agency | <input type="checkbox"/> |
| 4 | <input type="checkbox"/> Dell Therapy | P-00008 | Sole Proprietor | <input type="checkbox"/> |
| 5 | <input type="checkbox"/> Happy Steps Supplies | P-00001 | Retail | <input type="checkbox"/> |
| 6 | <input type="checkbox"/> Joe's Medical Devices | P-00002 | Retail | <input type="checkbox"/> |
| 7 | <input type="checkbox"/> Kid's Thrive Therapy | P-00003 | Sole Proprietor | <input type="checkbox"/> |
| 8 | <input type="checkbox"/> Sony | P-00007 | Retail | <input type="checkbox"/> |
| 9 | <input type="checkbox"/> Walmart | P-00004 | Retail | <input checked="" type="checkbox"/> |
| 10 | <input type="checkbox"/> Wisconsin Cheese Co. | P-00013 | Sole Proprietor | <input type="checkbox"/> |

Fill in all the required information about the provider and click **Save** to save the record. Once the provider has been created, it will be available for selection when creating service expenses.

New Provider

* Required Information

Information

Provider ID

Inactive?

* Name

Website

Complete this field.

* Category

Email

TIN

Phone Number

Physical Address (Street)

Mailing Address (Street)

Physical Address (City)

Mailing Address (City)

Physical Address (State/Province)

Mailing Address (State/Province)

Physical Address (ZIP/Postal Code)

Mailing Address (ZIP/Postal Code)

Physical Address (Country/Territory)

Cancel Save & New **Save**

Note: A provider can also be created during the Service Expense process.

3.3 Budget Page

The Budget page displays each county's annual budget allocation. Budgets are released once a year by DHS administrators and determine how much funding is available for program expenses.

County users can view their current budget, see how much has been spent, and track remaining funds. All service expenses are created against the annual budget.

To view budget records, choose any record link under the **Budget Name** column.

| Budget Name | Description | Period Name | Period Start Date | Period End Date | Type | Status |
|--|----------------------------------|-------------|-------------------|-----------------|------|--------|
| 1 Unified Budget | afsa | | 1/1/2025 | 12/31/2025 | | Active |
| 2 Unified 2025 | Unified - Lincoln, Langlade 2025 | | 1/1/2025 | 12/31/2025 | | Active |
| 3 North Central Healthcare (NCHC) 2025 | Consortia Budget | | 1/1/2025 | 12/31/2025 | | Active |
| 4 Lincoln CY2025 | 2025 | | 1/1/2025 | 12/31/2025 | | Active |
| 5 Lincoln 2025 | Unified - Lincoln | | 1/1/2025 | 12/31/2025 | | Active |
| 6 Langlade CY2025 | 2025 | | 1/1/2025 | 12/31/2025 | | Active |
| 7 Langlade 2025 | Unified - Langlade 2025 | | 1/1/2025 | 12/31/2025 | | Active |
| 8 Grant- CY 2025 | Grant county budget 2025 | | 1/1/2025 | 12/31/2025 | | Active |
| 9 Dane parent | test | | 1/1/2025 | 12/31/2025 | | Active |
| 10 Dane CY2025 YI | 2025 | | 1/1/2025 | 12/31/2025 | | Active |
| 11 Dane child | test | | 1/1/2025 | 12/31/2025 | | Active |
| 12 Dane - CY 2025 | Dane county budget 2025 | | 1/1/2025 | 12/31/2025 | | Active |
| 13 Brown - CY 2025 | Brown county budget 2025 | | 1/1/2025 | 12/31/2025 | | Active |
| 14 Brown - CY 2024 | Brown county budget 2025 | | 1/1/2024 | 12/31/2024 | | Active |

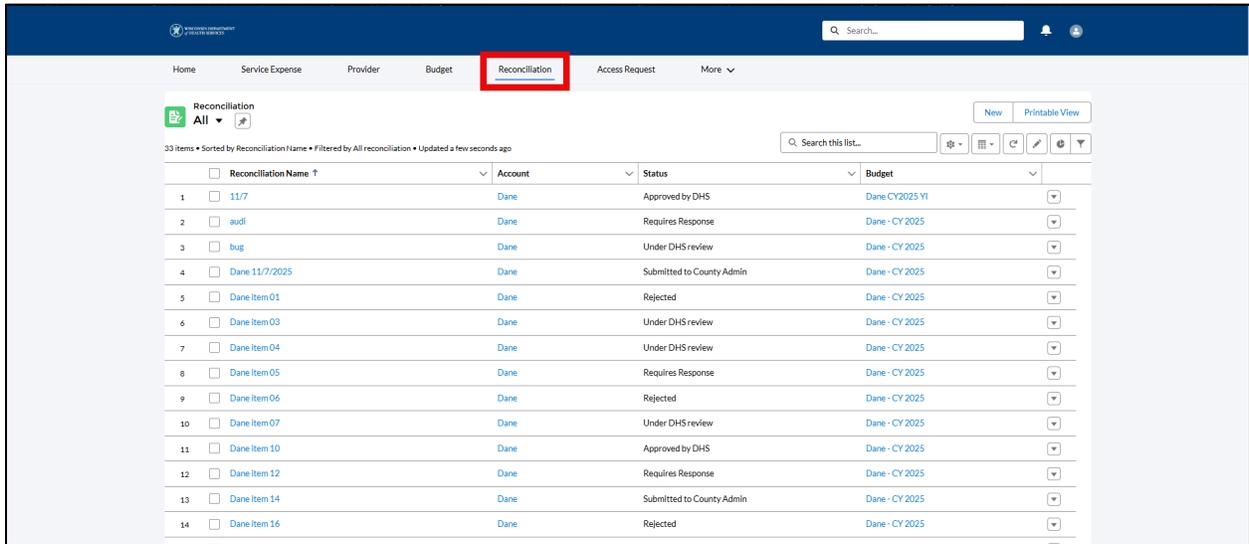
Here's an example of what a budget record looks like.

| Parent Budget | Period Name | Period Start Date | Period End Date | Description | Amount |
|---------------|-------------|-------------------|-----------------|-------------------------|--------------|
| | | 1/1/2025 | 12/31/2025 | Dane county budget 2025 | \$110,000.00 |

| DETAILS | | RELATED |
|--|--------------------------------------|---|
| Budget | Budget Name: Dane - CY 2025 | Status: Active |
| Account: 1010 | Description: Dane county budget 2025 | Created By: .1010.0025.937 AM |
| Program: CCOP | Created Date: 10/9/2025 9:57 AM | Last Modified By: .1171025.934 AM |
| Amount: \$110,000.00 | Created Date: 10/9/2025 9:57 AM | Last Modified Date: 11/7/2025 9:34 AM |
| Unfunded Amount: \$110,000.00 | Period Start Date: 1/1/2025 | Budget Method: \$250,000.00 |
| Period Start Date: 1/1/2025 | Period End Date: 12/31/2025 | Parent Budget: |
| Sub A Allocation: Assessments and Plans | Base Sub A Allocation: \$1,500.00 | Unfunded carryforward: \$0.00 |
| Assessment and planning carryforward: \$0.00 | Total Sub A Allocation: \$1,500.00 | |
| Sub B Allocation: CCOP Services | Base Sub B Allocation: \$88,500.00 | CCOP service carryforward: \$4,500.00 |
| Unfunded carryforward: \$0.00 | Total Sub B Allocation: \$93,000.00 | CCOP admin carryforward: \$0.00 |
| Totals | Total Base Allocation: \$90,000.00 | Total Budget: \$94,700.00 |
| Total carryforward: \$4,500.00 | | |
| Risk and Administrative Limits | Risk Reserve Maximum: \$13,500.00 | Admin Reimbursement Maximum: \$4,198.50 |
| Risk Reserve Deposit: \$10,000.00 | | Carryforward Maximum: \$45,000.00 |

3.4 Reconciliation Page

The Reconciliation page is where the annual reconciliation process takes place. Below is the list view of existing reconciliation records under the Reconciliation tab.

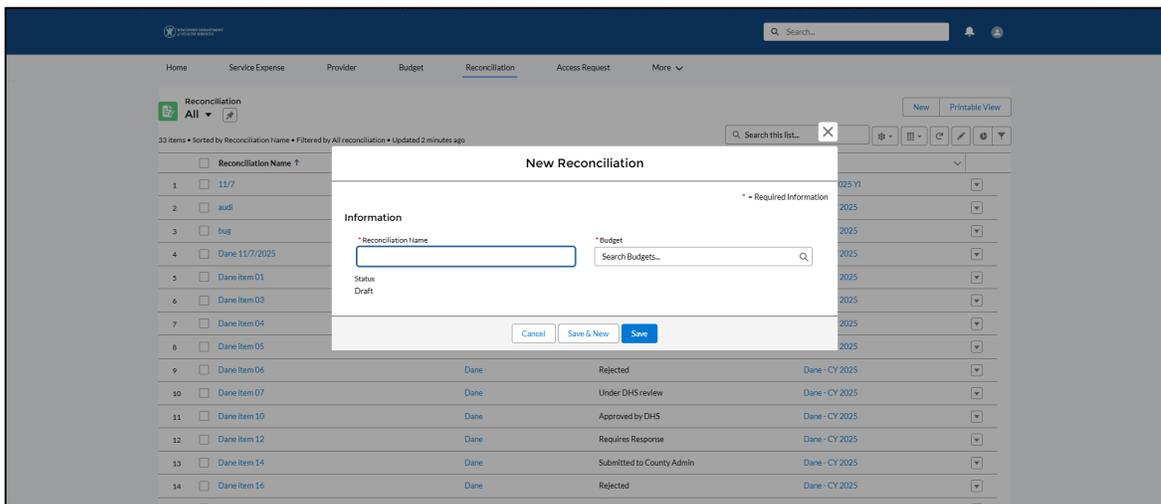


3.4.1 Working with Reconciliation Forms

County users can prepare reconciliation forms but **cannot** submit them to DHS. Only county admins can send reconciliation forms to DHS for review.

To work on a reconciliation form:

1. Navigate to the Reconciliation page
2. Name the reconciliation and add the relevant budget year by searching in the Budget field



Important: The system controls when users can access specific budget records for reconciliation.

- **Administrative Control** – DHS admins control when users can access certain budget records on the back end.
- **Budget-Year Alignment** – Budget records are tied to the calendar year. When creating a reconciliation record, the budget selection field will only display budgets that are currently available for reconciliation.
- **Reconciliation Timing** – Reconciliation takes place in the first quarter of the year (March-April timeframe) for the previous calendar year.

Example: If you're reconciling for the 2024 calendar year, this would typically occur in March or April of 2025. The system prevents scenarios where reconciliation would happen at inappropriate times (such as reconciling for 2024 in September 2024).

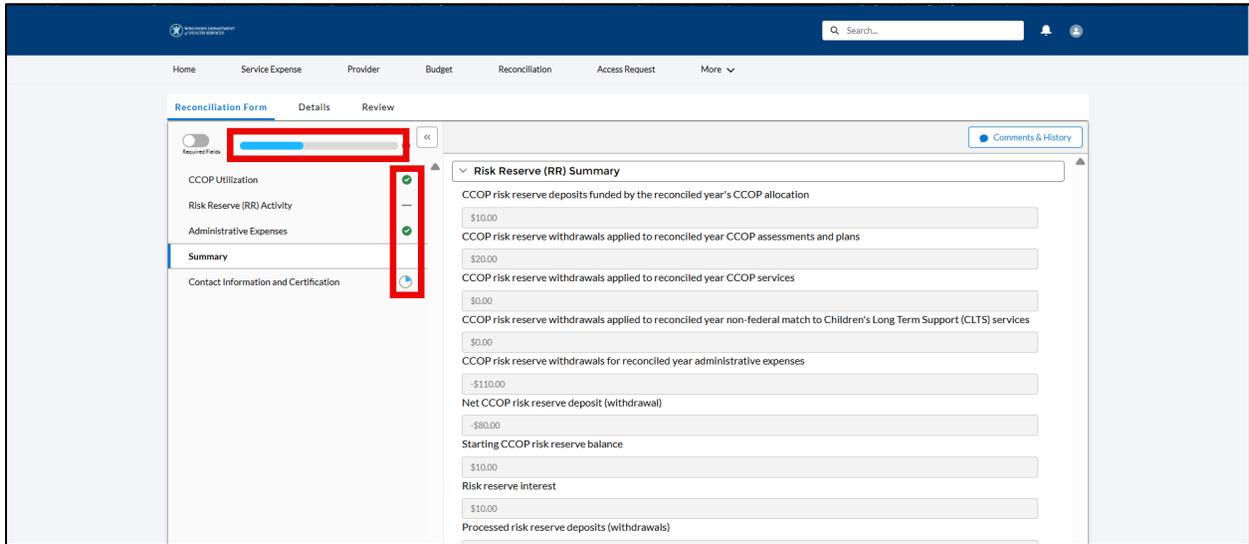
3.4.2 Reconciliation Form Tab

Fill in all required information comparing budgeted amounts to actual expenses in the Reconciliation Form Tab. Enter values in required fields or select "Accept Default Value" to complete the field.

The screenshot shows a web application interface for the 'Reconciliation Form' tab. The form is divided into three main sections: 'CCOP Utilization', 'CCOP Assessments and Plans', and 'CCOP Services'. Each section has a 'Reconciled Year' dropdown menu and a text input field. The 'Assessment and Plan Expenses' and 'Straight CCOP Service Expenses' fields are currently set to '\$0.00'. There are 'Accept Default Value' buttons for the 'Assessment and Plan Expenses' and 'Straight CCOP Service Expenses' fields. The form also includes a 'Required Fields' indicator and a 'Comments & History' button.

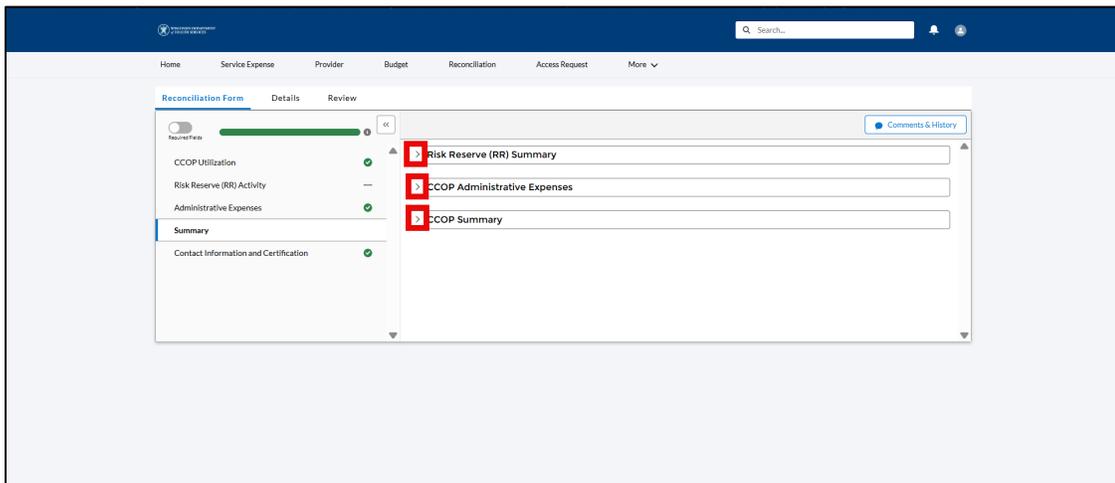
Progress Tracking

The Reconciliation Form tab includes progress indicators that show completion status for the individual sections and the overall form.



Reconciliation Form Features

- **Expandable Sections** – The lefthand panel can expand or hide the form section menu. Individual sections can be expanded or collapsed, allowing you to focus on the section you're currently working on.



- **Save as Draft** – Save your work in progress as a draft. You must save each section as a draft before moving to the next section. If you try to navigate away without saving, the system will notify you of unsaved data and require you to save before proceeding.

Calculated Fields

Some fields in the reconciliation form are automatically calculated and appear grayed out. Calculated fields update in two ways:

1. **Immediate calculation:** Some fields update automatically as soon as you enter a value in a related field.

Examples:

- Starting CCOP risk reserve balance
- Reported unreimbursed and unrequested from CCOP administrative costs

2. **Calculation on save:** Other fields update only after "Save as Draft" is selected.

Examples:

- Pending prior year CCOP risk reserve

- Ending CCOP risk reserve balance

The screenshot shows the 'Reconciliation Form' interface. On the left, a sidebar lists sections: CCOP Utilization, Risk Reserve (RR) Activity, Administrative Expenses, Summary (highlighted), and Contact Information and Certification. The main content area is titled 'Risk Reserve (RR) Summary' and contains the following data:

| | |
|--|-----------|
| CCOP risk reserve deposits funded by the reconciled year's CCOP allocation | \$10.00 |
| CCOP risk reserve withdrawals applied to reconciled year CCOP assessments and plans | \$20.00 |
| CCOP risk reserve withdrawals applied to reconciled year CCOP services | \$0.00 |
| CCOP risk reserve withdrawals applied to reconciled year non-federal match to Children's Long Term Support (CLTS) services | \$0.00 |
| CCOP risk reserve withdrawals for reconciled year administrative expenses | -\$110.00 |
| Net CCOP risk reserve deposit (withdrawal) | -\$80.00 |
| Starting CCOP risk reserve balance | \$10.00 |
| Risk reserve interest | \$10.00 |
| Processed risk reserve deposits (withdrawals) | |

Conditional Questions

Certain fields may appear based on your answers to conditional questions, such as whether your county maintains a risk reserve.

In the last section, Contact Information and Certification, click **Submit** to save and submit your work.

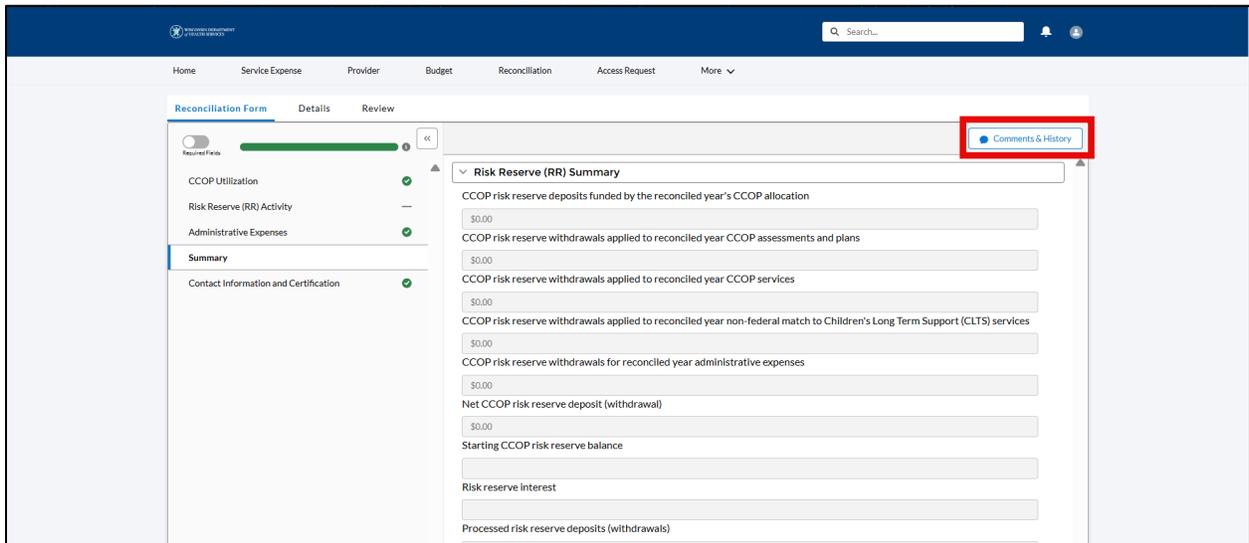
The screenshot shows the 'Contact Information and Certification' section of the form. The sidebar on the left has 'Contact Information and Certification' highlighted. The main content area contains the following sections:

- Contact Information:** Fields for Phone Number, Email Address, City, and Zip Code.
- Secondary CCOP Fiscal Contact:** Fields for Last Name, First Name, Phone Number, Email Address, Title/Position, Street Address, City, and Zip Code.
- Certification:** Fields for Name, CWA Approval Date (set to Nov 3, 2025), and Title/Position.

A blue 'Submit' button is located at the bottom right of the form.

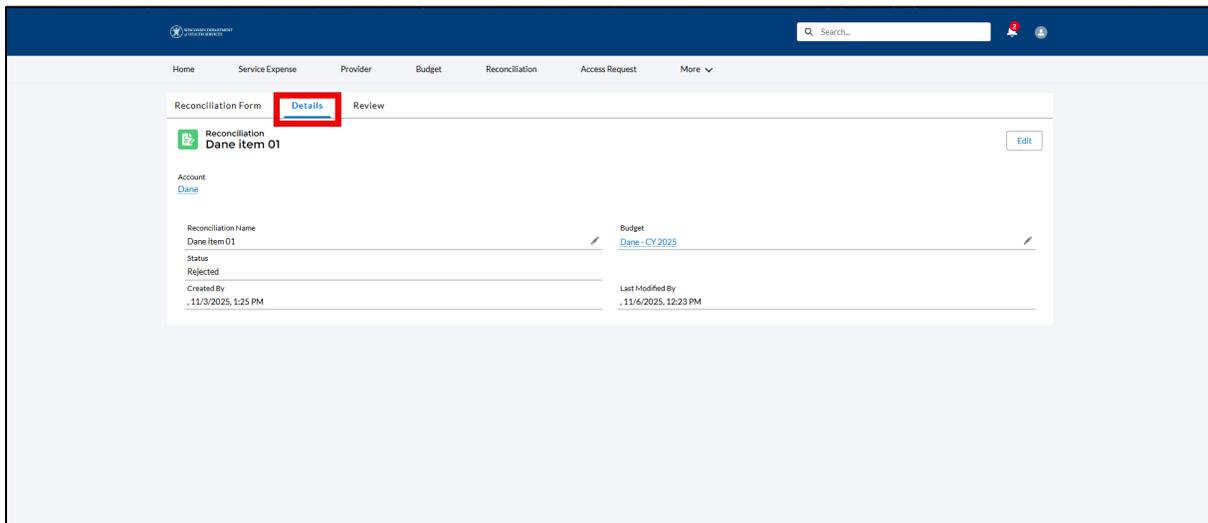
Once a county user submits a form, the county admin will be notified and review the form. County admins can approve or reject. When a county admin approves and submits the reconciliation form, DHS will review and either approve or reject it. County admins and DHS may add comments requesting clarification once a form is rejected.

Comments can be found using the Comment & History button inside of the reconciliation form. See section 3.4.3 County Admin Review Process.



Details Tab

The Details tab can be checked for additional information related to the reconciliation form including the record status; whether it has been **Approved by DHS, Rejected, Submitted to the County Admin, Under DHS review, or Requires Response**. When the record is saved or submitted, it will be found under the Reconciliation Page list view.

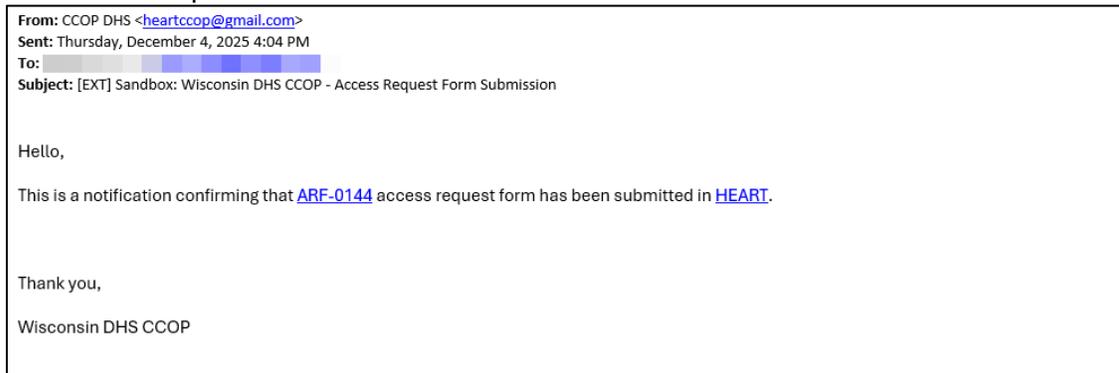


3.4.3 County Admin Review Process

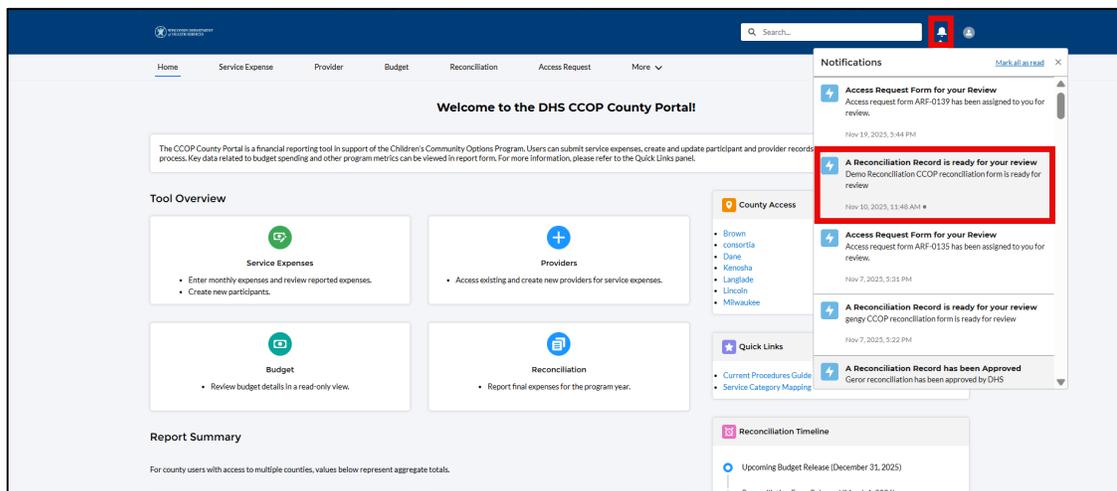
After a county user submits a reconciliation form, it enters review with the county admin.

Notifications

- The county admin receives both an email notification and a portal notification indicating that a reconciliation form is ready for review. Here is an example of the email template:



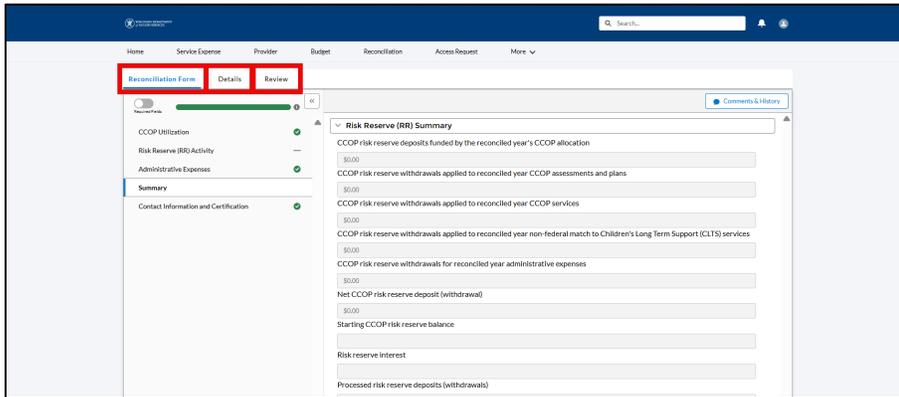
- The portal notification appears in the system (bell icon) and includes details about the submitted record
- Clicking the notification directs the admin to the reconciliation record



Alternatively, a county admin can look for the reconciliation record under "Submitted to County Admin" status in the Reconciliation list view to begin reviewing it.

Review Steps

1. County admins review all tabs of the submitted form
2. They look through and verify what the county user has input
3. On the Review tab, they provide the review decision

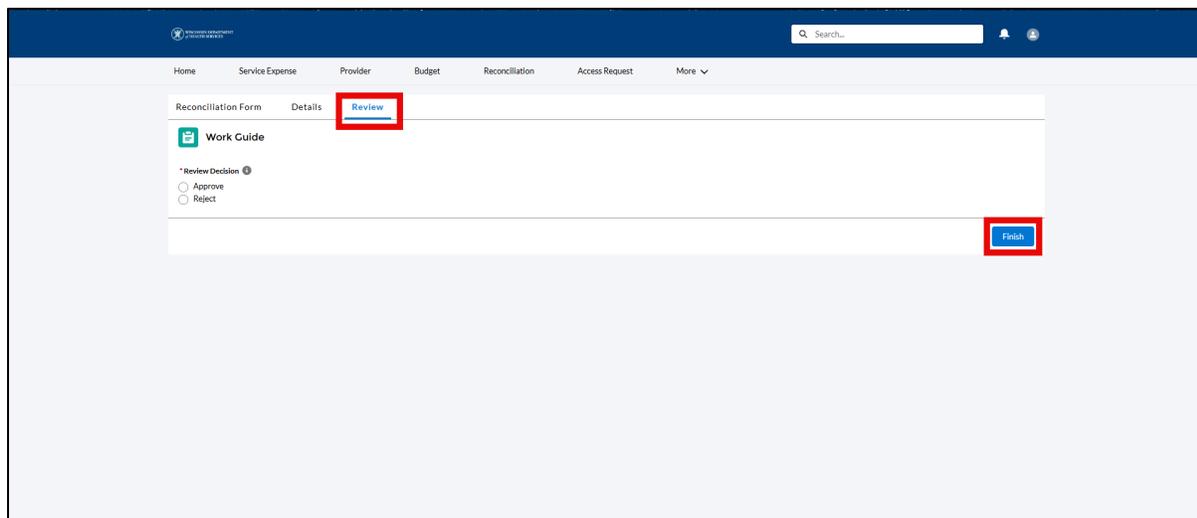


The screenshot shows a web application interface for a Reconciliation Form. The top navigation bar includes 'Home', 'Service Expense', 'Provider', 'Budget', 'Reconciliation', 'Access Request', and 'More'. Below this, there are three tabs: 'Reconciliation Form', 'Details', and 'Review'. The 'Review' tab is currently selected and highlighted with a red box. The main content area is divided into two sections. On the left, there is a 'Summary' section with a 'Contact Information and Certification' link. On the right, there is a 'Risk Reserve (RR) Summary' section with a list of items and their corresponding values, such as 'CCOP risk reserve deposits funded by the reconciled year's CCOP allocation' with a value of '\$0.00'. A 'Comments & History' button is visible in the top right corner of the main content area.

Review Decisions

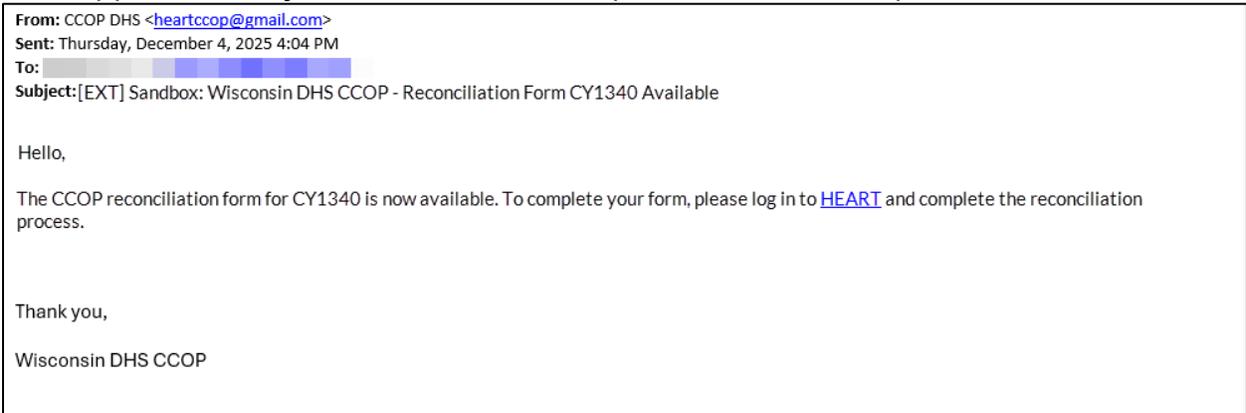
County admins have two options:

- **Approve** - Sends the form to the DHS admin approval queue. Status changes from "Submitted" to "Under DHS Review" in the Reconciliation record.
- **Reject** - Returns the form to the county user for corrections. Status changes from "Submitted" to "Rejected" in the Reconciliation record. Rejection is appropriate when:
 - There is new content that needs to be updated
 - There is inaccurate information throughout the form

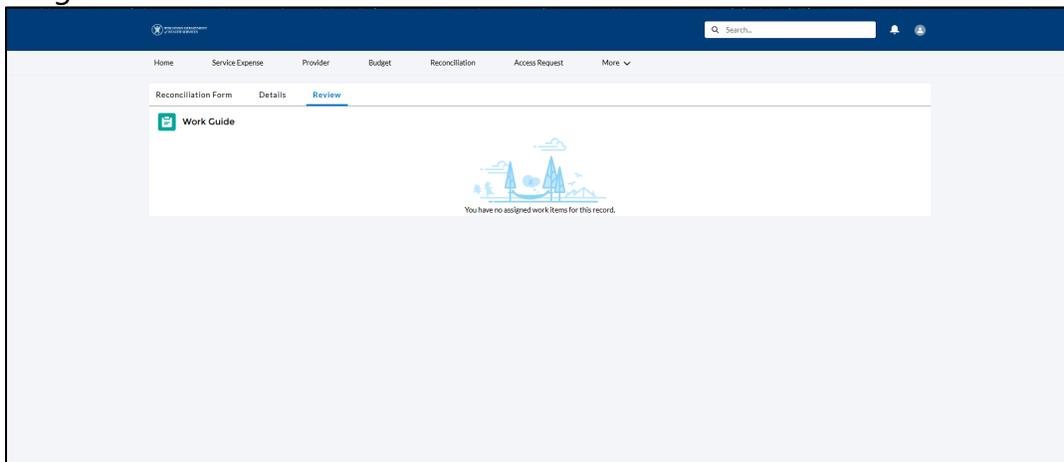


The screenshot shows the 'Review' tab of the Reconciliation Form. The 'Review' tab is selected and highlighted with a red box. Below the tabs, there is a 'Work Guide' section with a document icon. Underneath, there is a 'Review Decision' section with two radio buttons: 'Approve' and 'Reject'. A 'Finish' button is located at the bottom right of the form, also highlighted with a red box.

Select **Finish** to confirm the status of the form. The county user that submitted the reconciliation form will get an email notification that lets them know if their form has been approved or rejected. Here is an example of the email template:



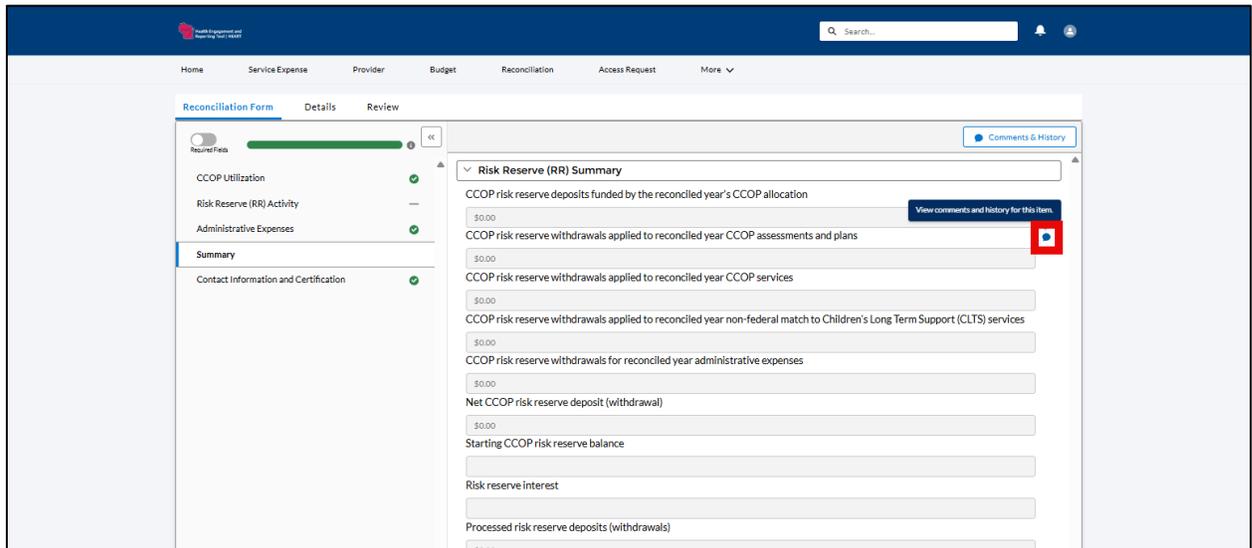
Note: When a reconciliation form is approved or rejected, the work guide has no assigned work items for the record.



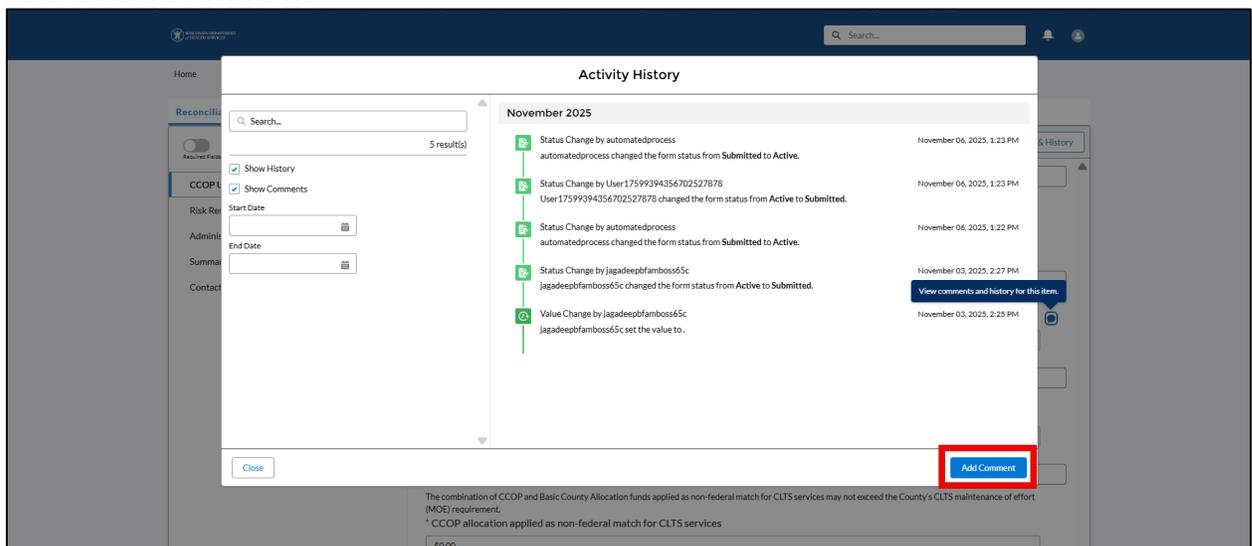
3.4.4 Adding Comments as County Admins

County admins can add comments for specific fields when rejecting a form. For example, if there's an issue with a particular field, they can leave a comment explaining the issue to the county user.

1. Start adding comments by clicking the comment icon next to the field you want to comment on.

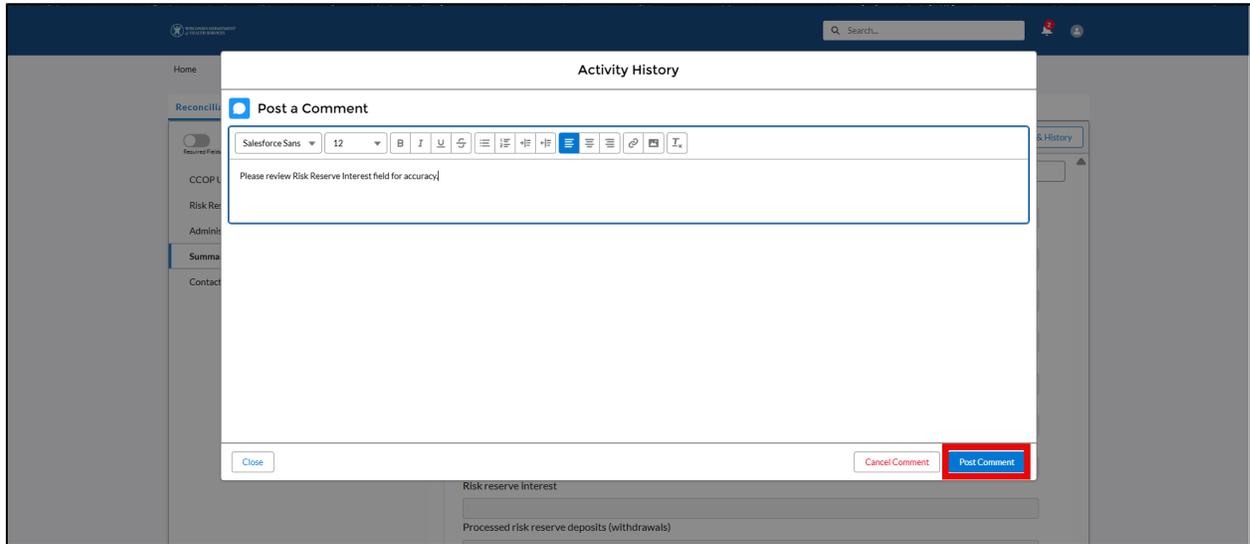


2. Select **Add Comment**.



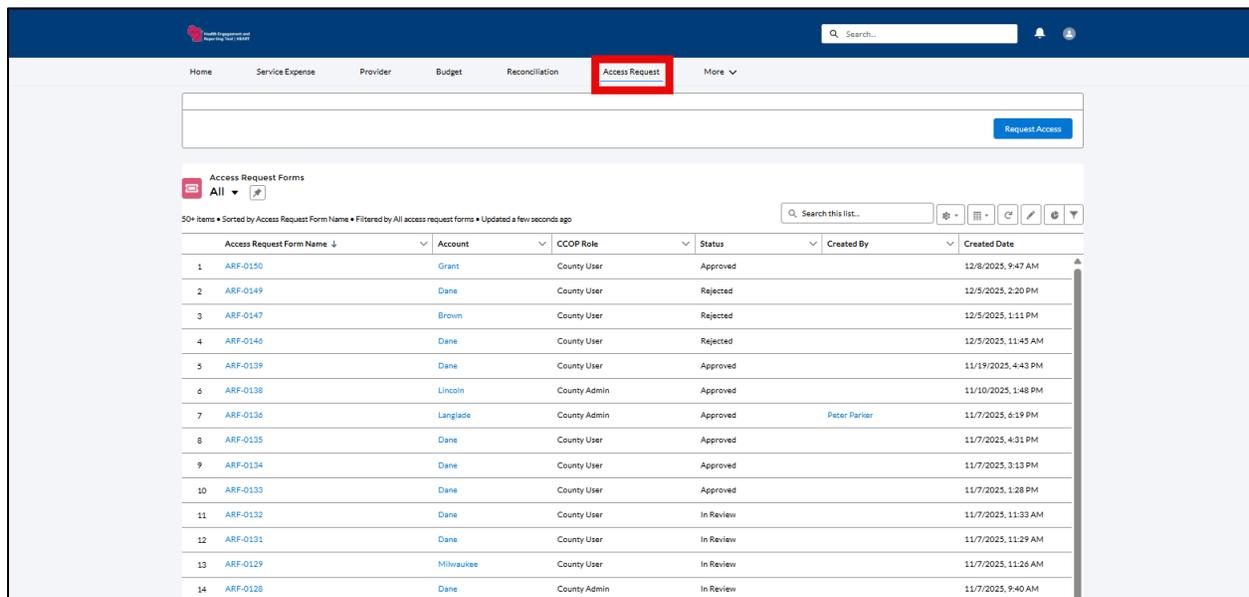
A text editor will appear ready for any observations that need to be posted to the county user.

3. Click **Post Comment** to save comment.



3.5 Access Request Page

The Access Request page is where county users can request additional access or permissions after their initial access has been granted. For more information on submitting for initial access requests, see section 2.3 Submitting an Access Request Form.



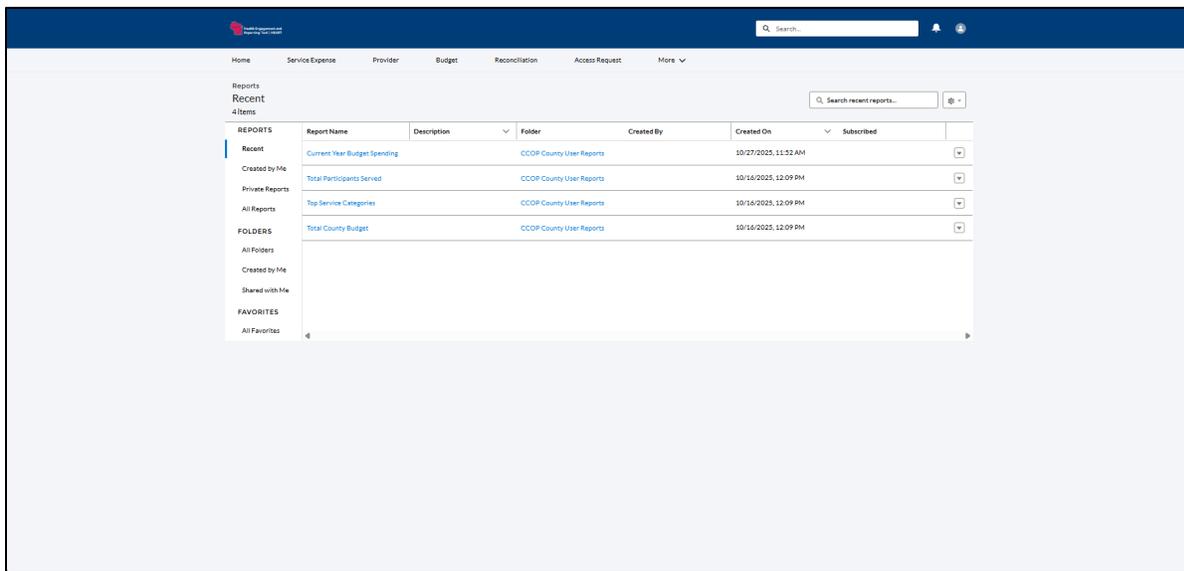
3.6 Reports Page

The Reports section in the CCOP system allows users to view pre-built reports about their county's data. County users and county admins can access reports through the navigation bar to see information about service expenses, budgets, providers, and participants for their county. If a user has access to multiple counties, the reports will aggregate data across all counties they have access to.

To reach the Reports Page, you may need to select the **More** dropdown to reveal more pages in the navigation bar.

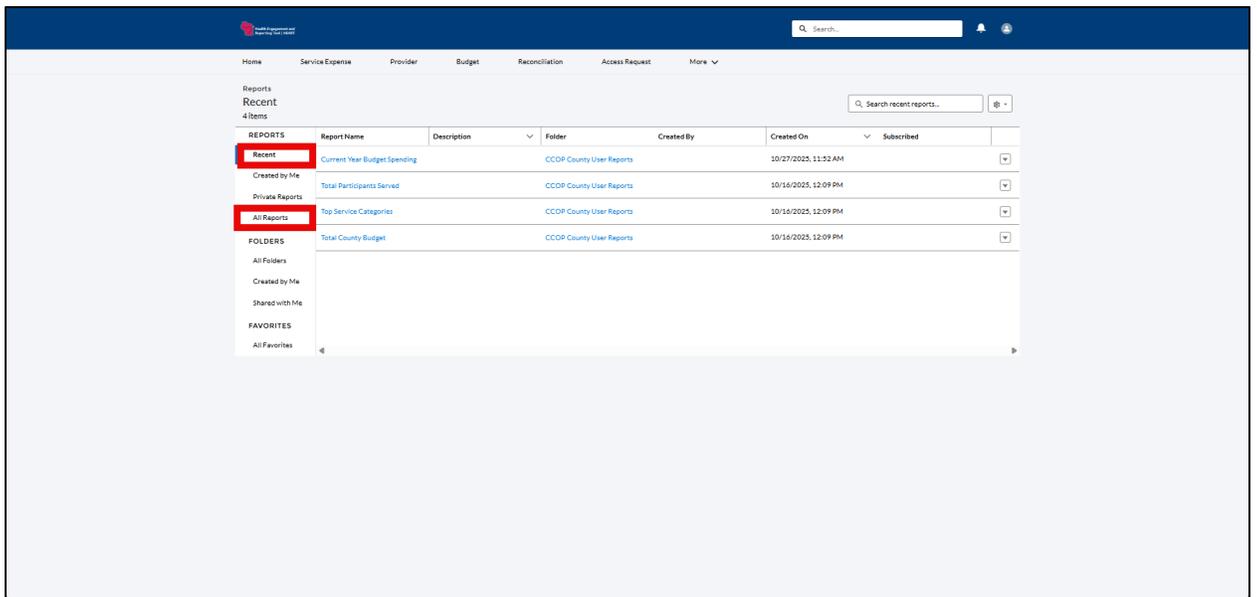
What you'll see:

- **Left sidebar:** Recent, All Reports, Shared with Me, and Folders such as "CCOP County User Reports."
- **Main table columns:** Report Name, Description, Folder, Created By, Created On, Subscribed.

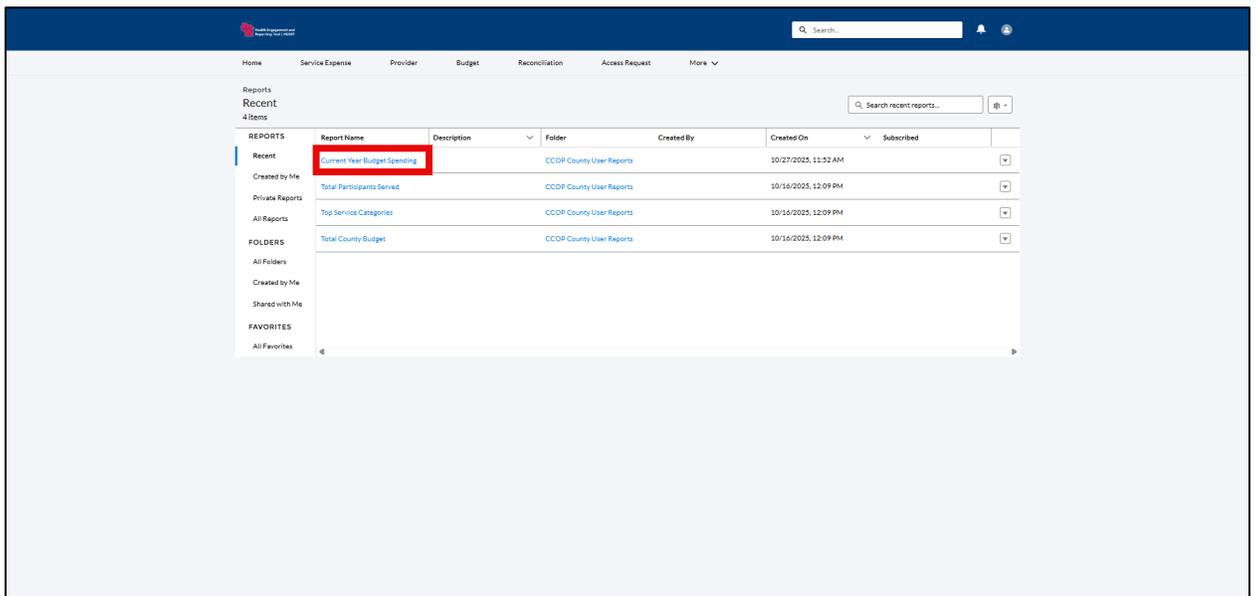


To view a report

1. Go to Recent or All Reports.



2. Click the report name.



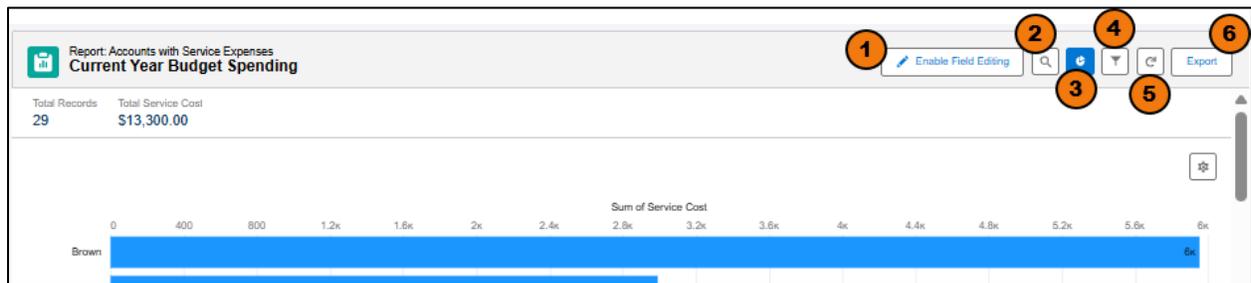
Note: Users do not have the ability to create reports or folders; they can only view them.

3.6.1 Managing Reports

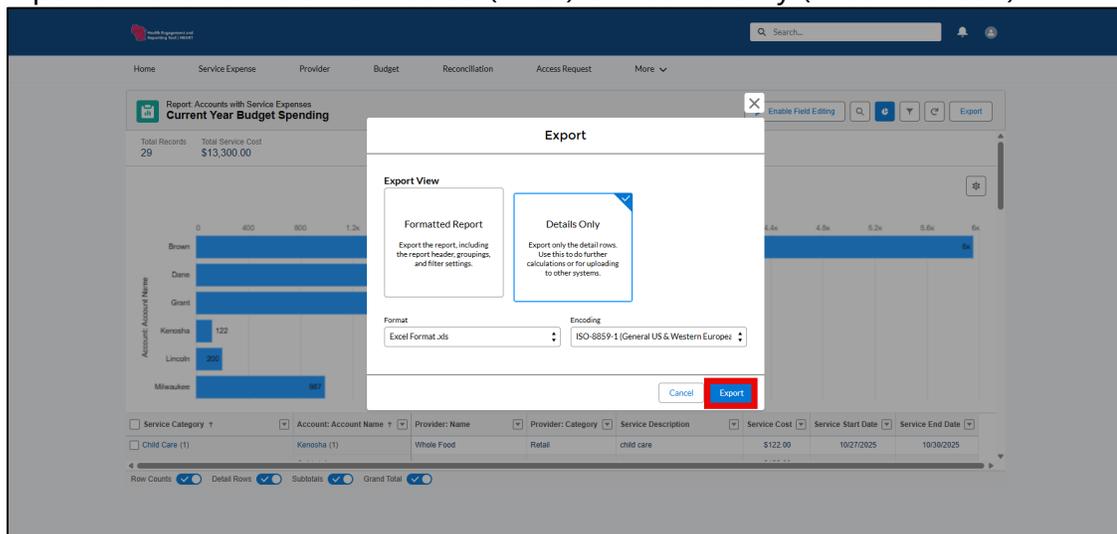
Each report includes:

- A chart summarizing the results. Hover over the chart components to see exact values.
- A table beneath the chart showing the underlying records the chart is based on

Core controls

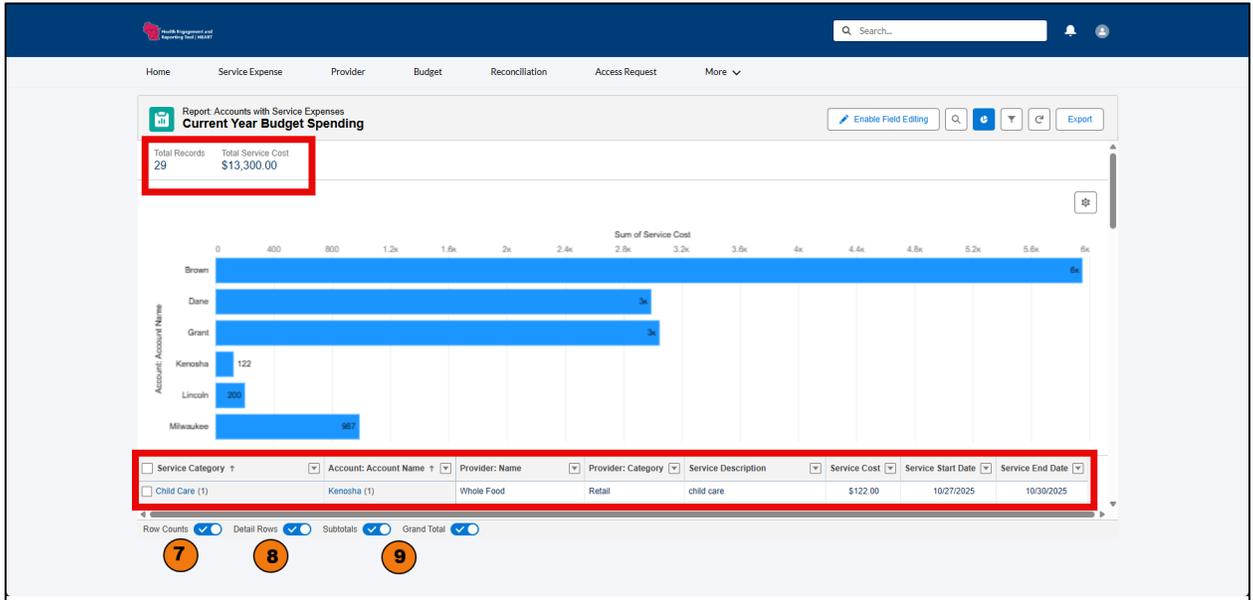


1. **Enable Field Editing:** Click the pencil icon to edit values directly in the report table. Changes save automatically when you click outside the field.
2. **Search:** Use the search box above the chart to find specific records or values.
3. **Toggle Chart:** Toggle between seeing the report chart or simple report.
4. **Filter:** Adjust the current filters. Reports can be filtered by county.
5. **Refresh button:** Click the back arrow to refresh report to the most up to date data.
6. **Export:** Click the Export button to download the report data. You can export reports in two formats: Formatted (Excel) or Details Only (Excel and CSV).



7. **Row count:** The table displays the total number of rows returned based on your current filters, helping you gauge the volume of data.
8. **Detail Rows:** ON shows individual records, OFF shows grouped summaries only.

9. **Subtotals and Grand Total:** Toggle to display group level totals and an overall total when available.



4. FAQs and Support Information

| # | Question | Response |
|---|--|--|
| 1 | Who can I contact with questions about the CCOP County Portal? | <p>If you have any questions or encounter issues with the portal, please email the appropriate inbox below:</p> <p>BOSS Inbox: DHSDMSBOSS@dhs.wisconsin.gov</p> <ul style="list-style-type: none"> • First line of support for users having issues with the system <p>BFAM CLTS Fiscal Inbox: DHSCLTSFiscal@dhs.wisconsin.gov</p> <ul style="list-style-type: none"> • Fiscal questions from a county waiver agency that need to be answered by a budget and policy analyst at DHS. |

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| | | <p>BCS Technical Assistance Inbox: DHSBCSTAC@dhs.wisconsin.gov</p> <ul style="list-style-type: none"> Program policy and operations questions from a county waiver agency that need to be answered by a Children and Family Program Specialist at DHS. <p>MyWisconsin ID: https://det.wi.gov/Pages/MyWisconsin_ID.aspx or 608-471-6667</p> <ul style="list-style-type: none"> Issues with MyWisconsin ID setup, password resets, etc. |
| 2 | Why can't I find a participant in the system? | Participants are only visible to users within their assigned county for privacy and data access reasons. The system does not display a full participant list. Rather, participants must be located using the following search criteria: First name, last name, and MCI ID. The participant search uses exact match criteria, so partial names or misspellings will return no results. |
| 3 | What should I use for the provider when giving money to a parent or guardian directly? | Use the provider named "Individual" and identify who was paid and what the payment was for in the service description field. |
| 4 | Will I be able to see my county budgets if my county is part of a consortium? | If your counties are part of a consortium, you will be able to view the consortium budget rather than the individual budgets. |
| 5 | In what format should values be added in the reconciliation form? | By relevant fields, there will be a small grey circle with an 'i'. Hovering over that circle will provide additional details that will help you fill in the field. The system will also display an error if the incorrect format is entered. |
| 6 | Can I save my progress on the reconciliation form and come back to it later? | Yes. At the end of each page in the reconciliation form, there will be a button titled 'Save as Draft'. Clicking that will save your progress. There are also circular pie charts beside each subsection of the form (on the left) that display your progress. A fully green circle indicates a fully filled out section. |

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| 7 | Can I edit my reconciliation form after submitting it? | No. After a form is submitted, it becomes locked and cannot be edited by the County User. Only a County Admin can take further action. If you need to make changes after submitting, contact your County Admin and request the form be rejected and unlocked for editing and resubmission. |
| 8 | How will I know when a reconciliation form is ready for me to review/ has been reviewed? | County Admins will be notified via email and via the bell icon on the HEART portal when a Reconciliation Form and/or an Access Request Form is ready for them to review. County users will be notified via email and via the bell icon on the HEART Portal when their reconciliation form and/or Access Request Form has been submitted, or when it has been approved or rejected. |
| 9 | Will I be able to see my county budgets if my county is part of a consortium? | If your counties are part of a consortium, you will be able to view the consortium budget rather than the individual budgets. |
| 10 | How do I remove a County User from my county as County Admin? | On the home page, find the "County Access" component. Select the appropriate county listed in that component. On the county record page, click the "Related" tab. In the "Related Contacts" list, locate the County User you wish to remove. Click the drop-down arrow next to the user's email and select "View Relationship". On the Account Contact Relationship record page, click "Deactivate County User Access" in the top right-hand corner. Deactivating this record removes the County User's access to that county. |
| 11 | Can I remove a County Admin from my county? | No. Only DHS Users have the ability to deactivate County Admins. |
| 11 | Can I modify and/or export reports? | Yes. County Admins and County User will be able to generate new reports, filter and view existing reports, and export reports. |