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

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.

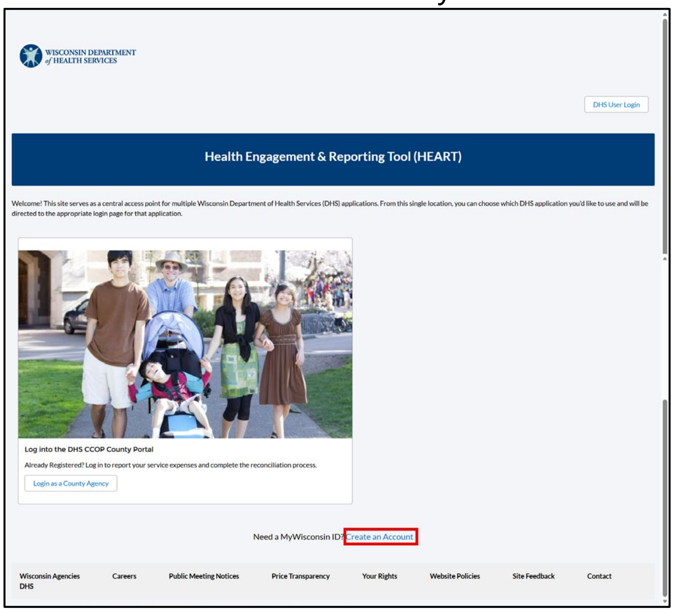
2. Logging in for the First Time

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.

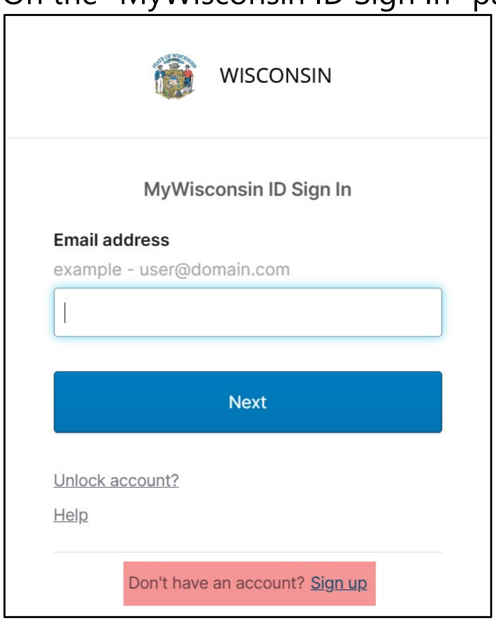
If you already have a MyWisconsin ID, please refer to section 2.2 in this document.

2.1 Creating a MyWisconsin ID

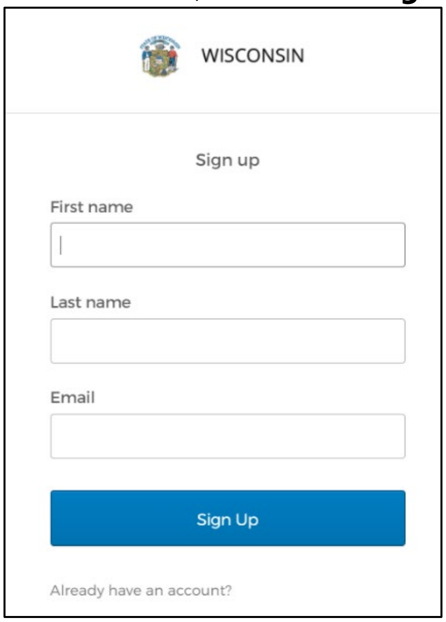
1. Go to the landing page at https://bfamboss.my.site.com/HEART and select **Create an Account** next to "Need a MyWisconsin ID?"



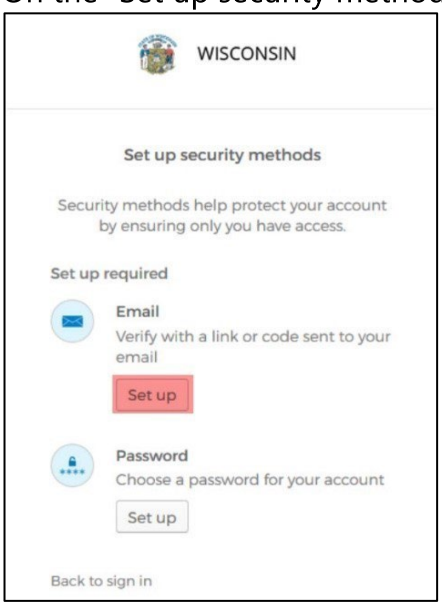
2. On the "MyWisconsin ID Sign In" page, select **Sign up**.



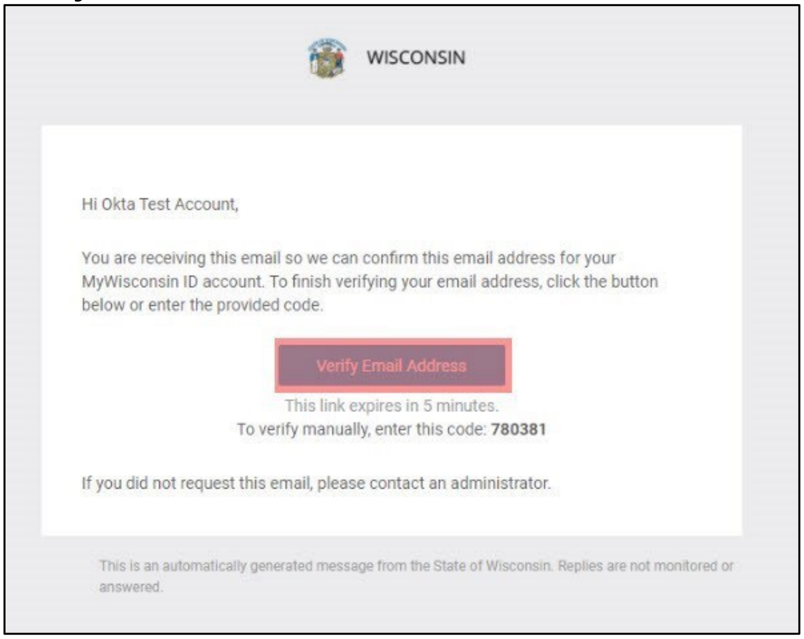
3. On the “Sign up” page, enter a first name, last name, and a **non-State** (DHS) email address; then select **Sign Up**.



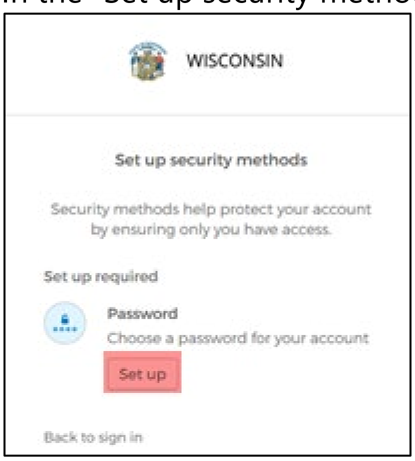
4. On the “Set up security methods” page, select **Set up** under Email.



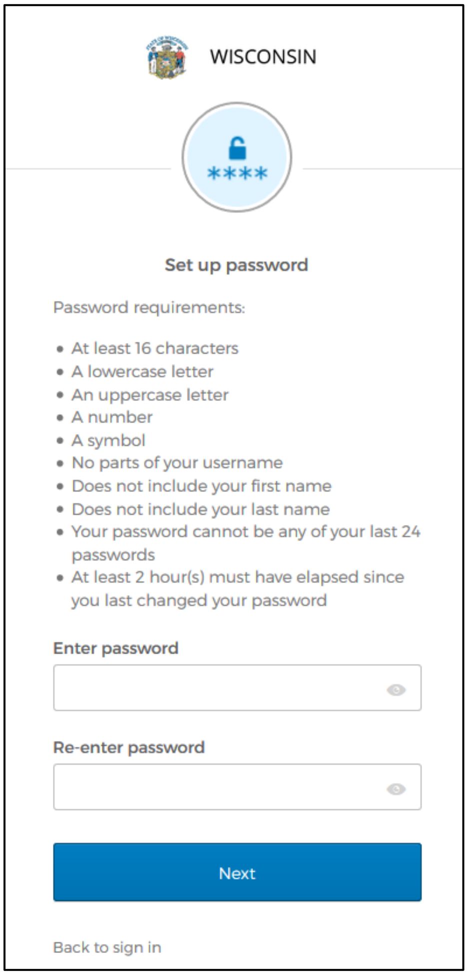
5. Open the email entered in Step 3, check for the verification email, and select **Verify Email Address.**



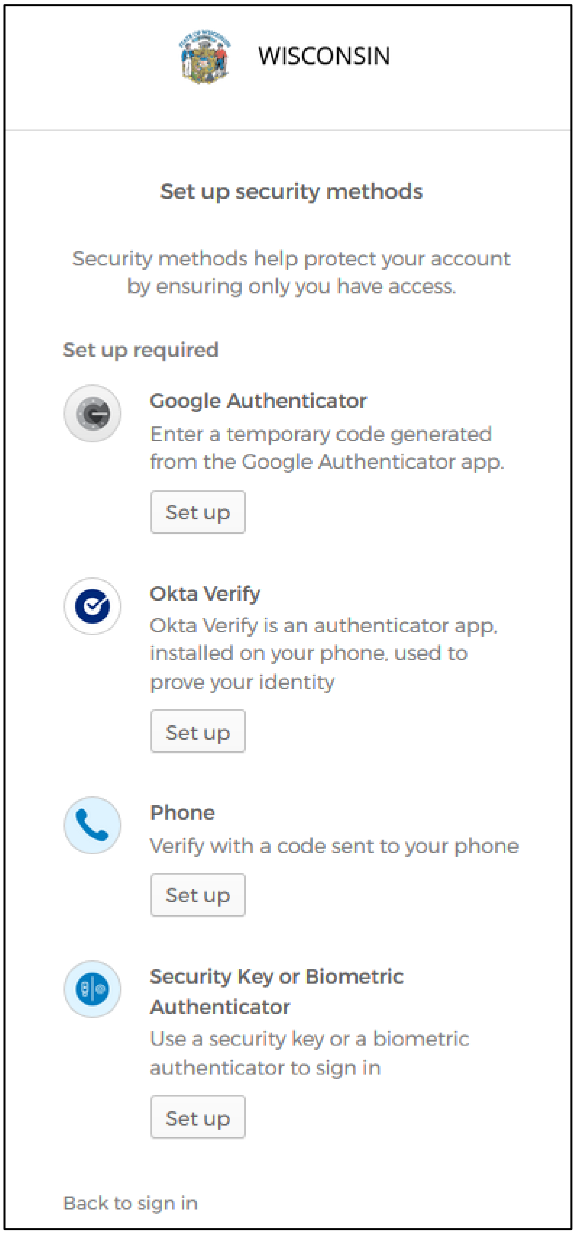
6. In the "Set up security methods" page, select **Set up** under Password.



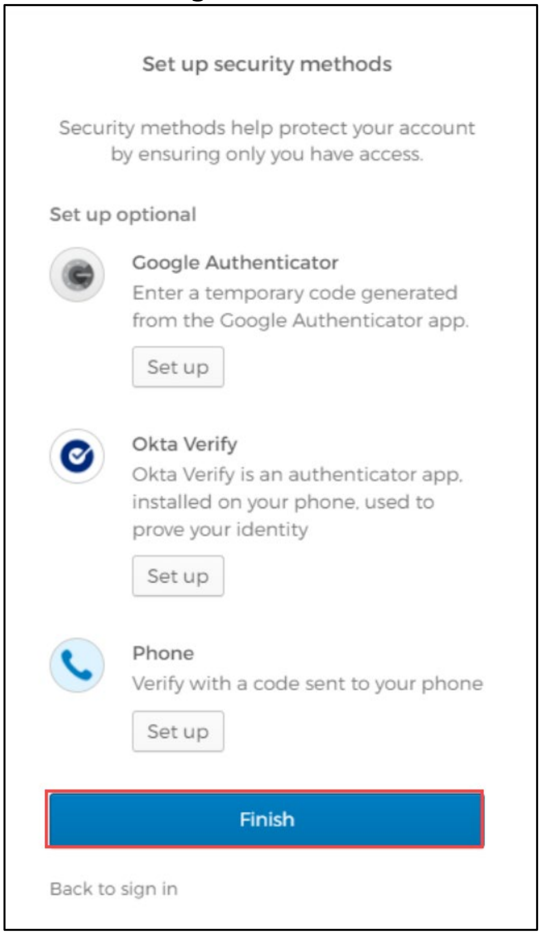
7. Enter a unique password in the “Set up password” page, re-enter it, and select **Next**.



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.



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

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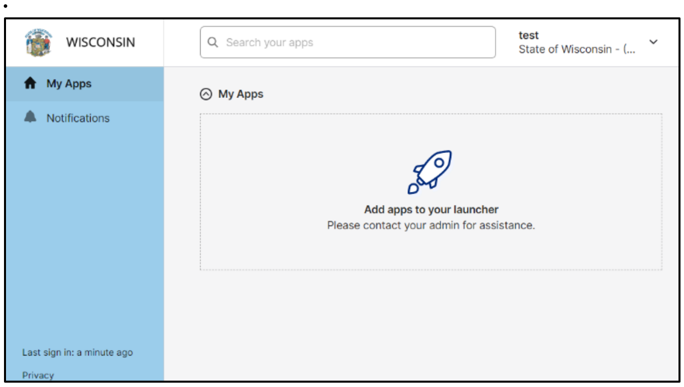
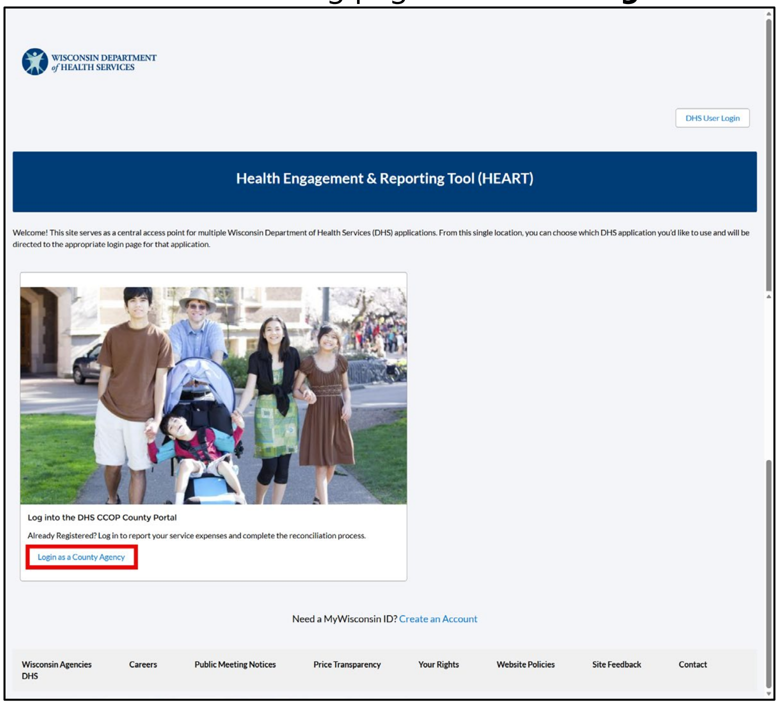


Note: Contact the MyWisconsin ID Account Service Desk at 608-471-6667 if you experience any issue setting up your MyWisconsin ID and password.

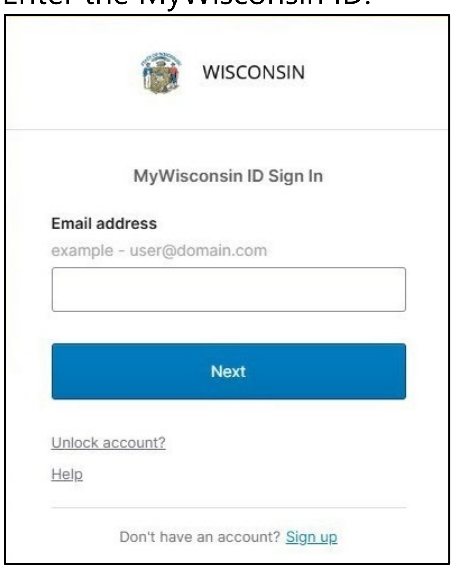
2.2 Logging in

1. Go to the landing page and select **Login as a County Agency**.

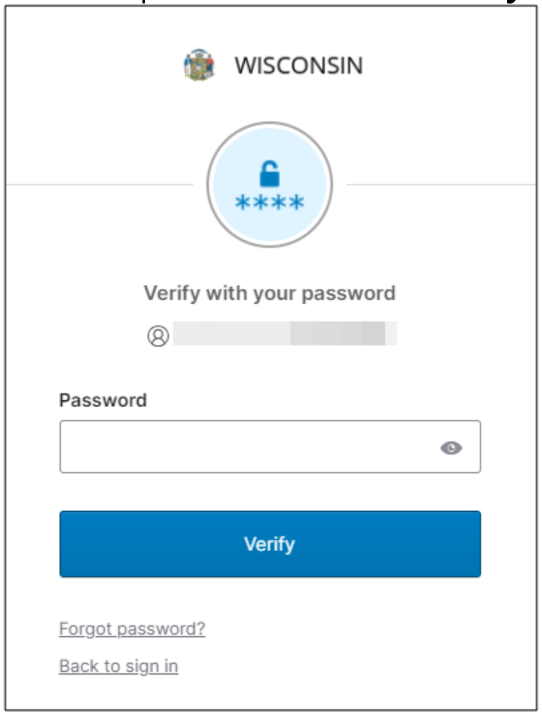


Note: If your browser has an open MyWisconsin ID session, you will go directly to the CCOP County Portal home page without being prompted to log in (Steps 2-5).

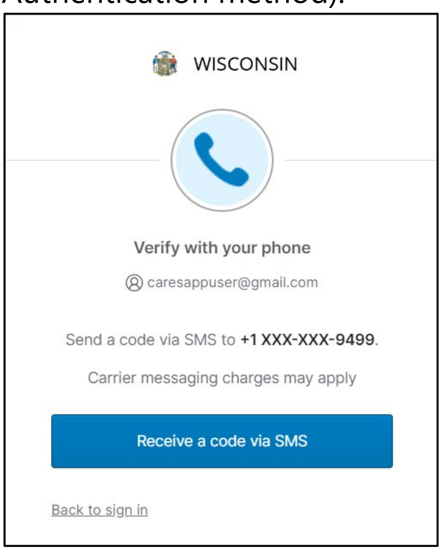
2. Enter the MyWisconsin ID.



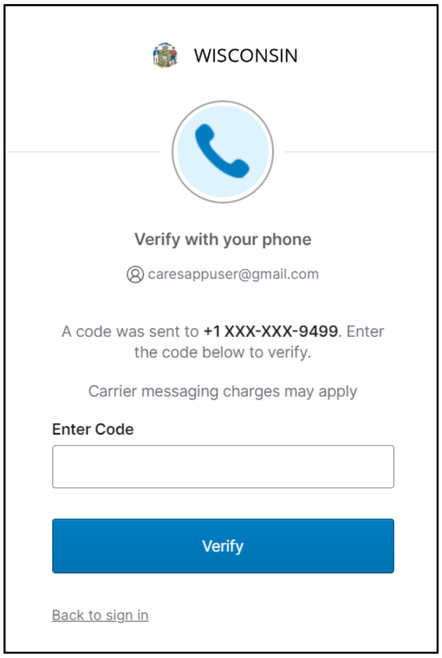
3. Enter the password and select **Verify**.



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



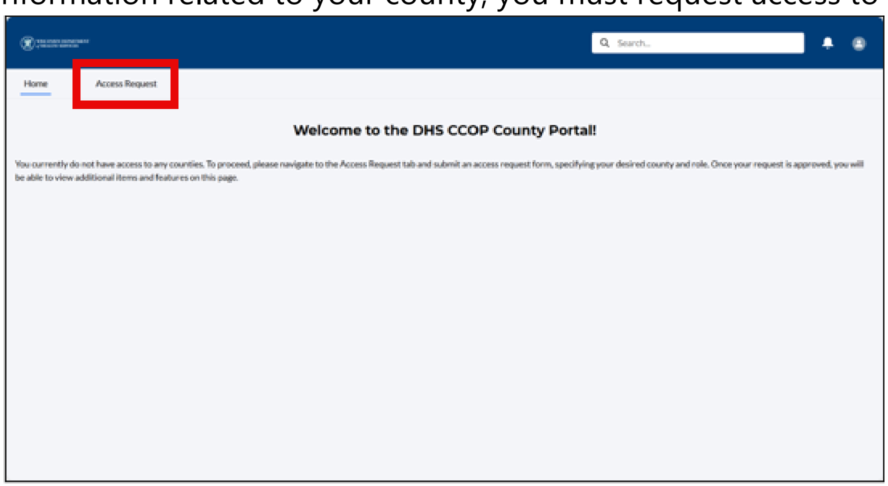
5. Enter the code from the MFA method you choose and select **Verify**.



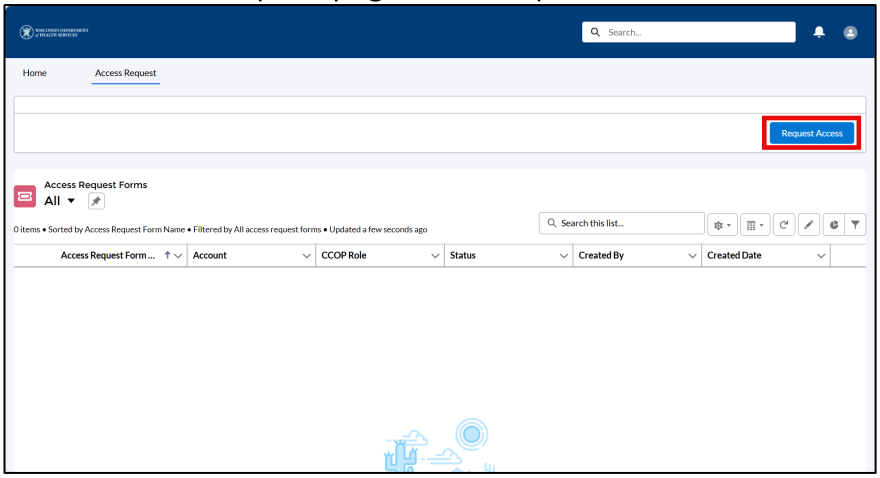
6. If the authentication is successful, you will be directed to the County Portal Home page.

2.3 Submitting an Access Request Form

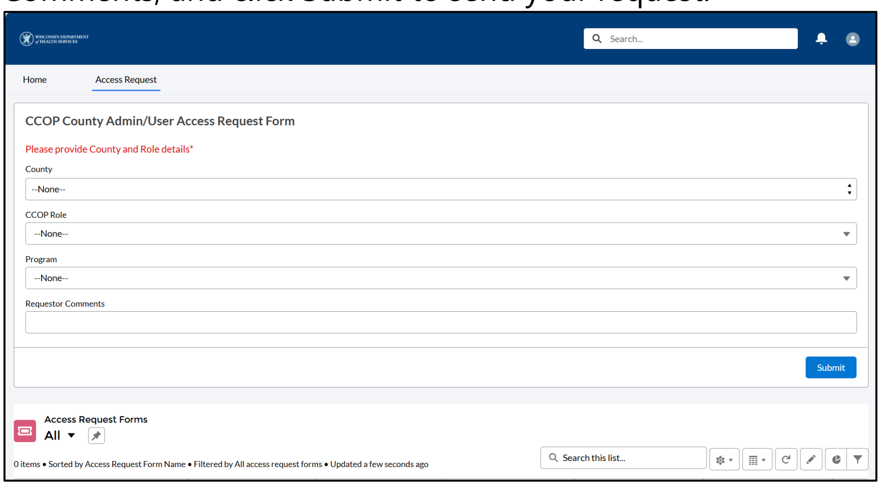
When you log into the portal for the first time, you will see the following screen. To view information related to your county, you must request access to it.



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

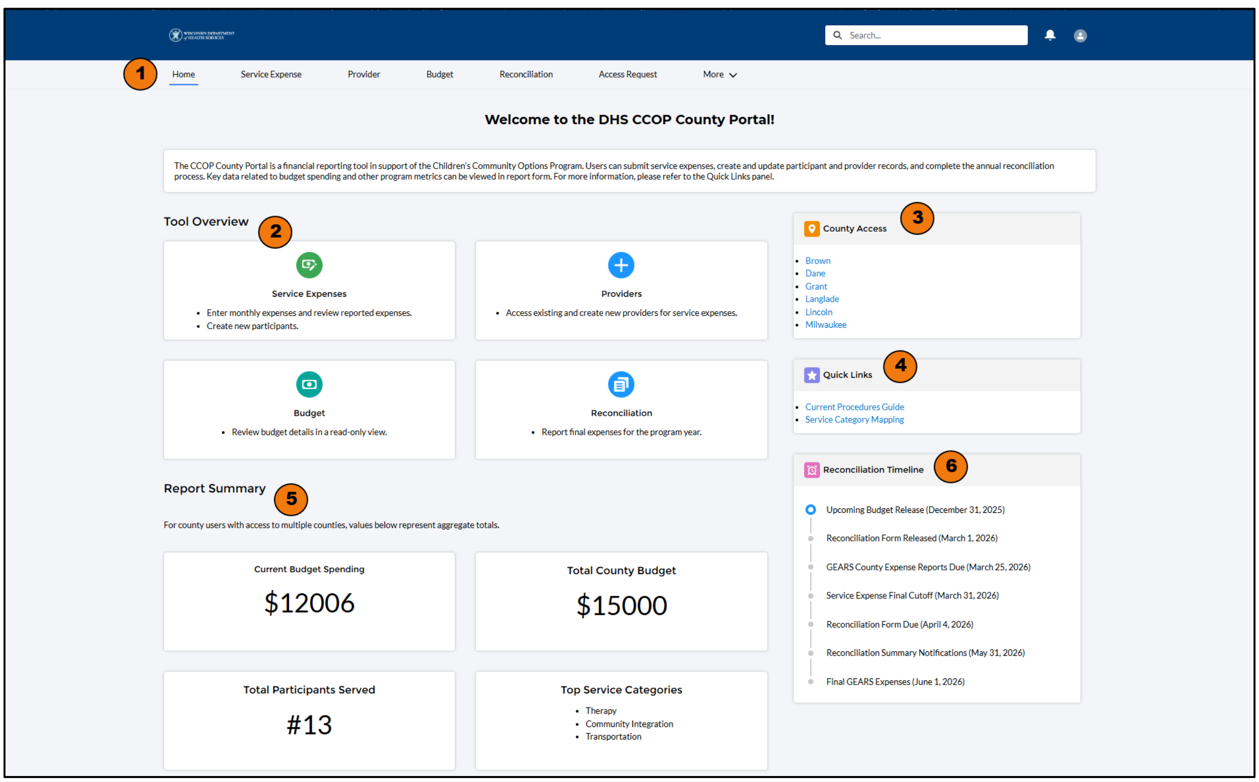
Before any other users can be approved, each county must first identify and request access for a County Admin.

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.

3. **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.

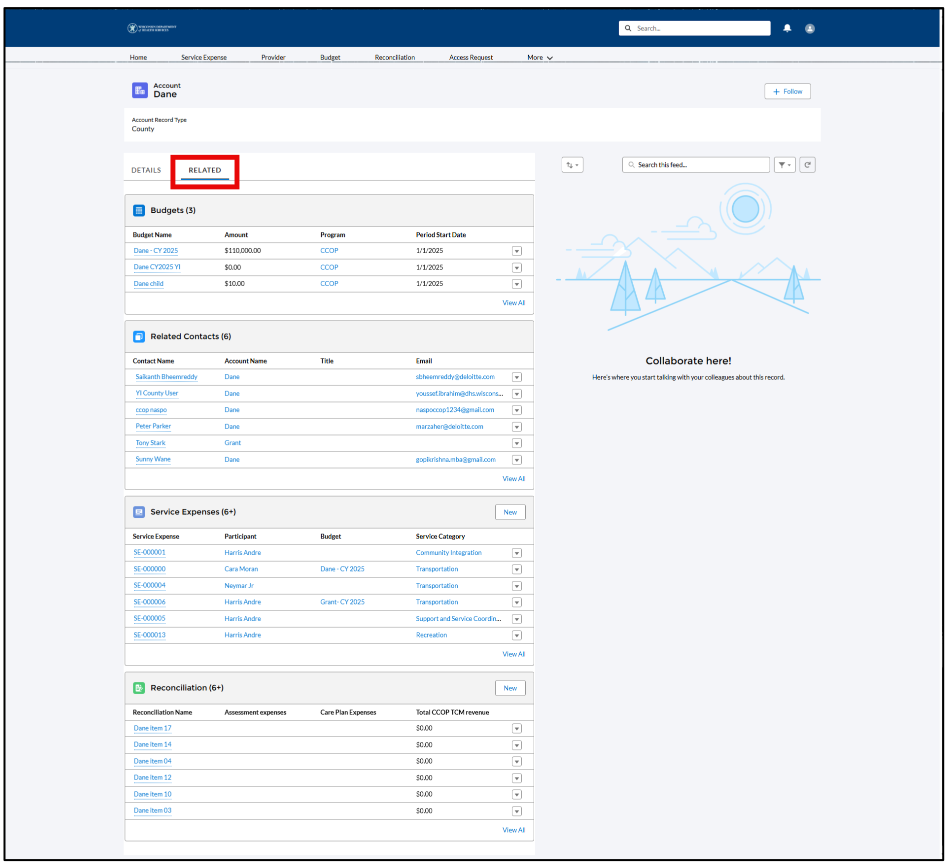
4. **Quick Links** - Shortcuts to help docs and reference resources for common tasks.

5. **Report Summary** - Snapshot of key county metrics. Selecting any frame in this section will open its report record.

6. **Reconciliation Timeline** - Key dates for budget release, forms, cutoffs, and final reports to guide reconciliation milestones.

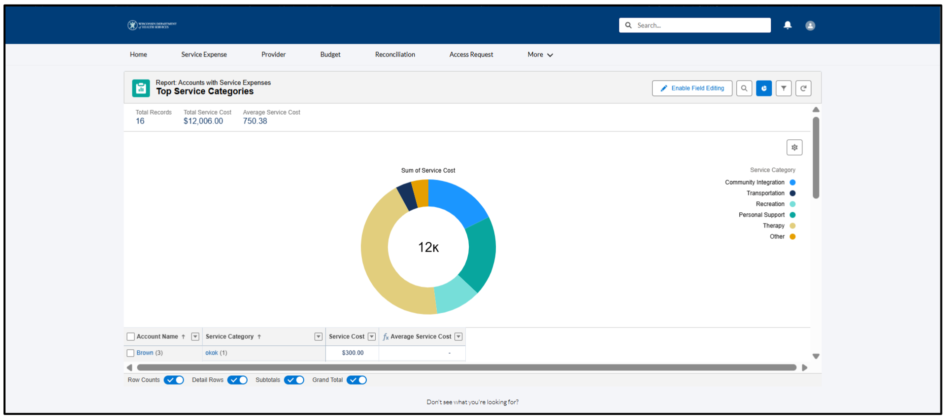
Additional details for County Access (#3):

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.



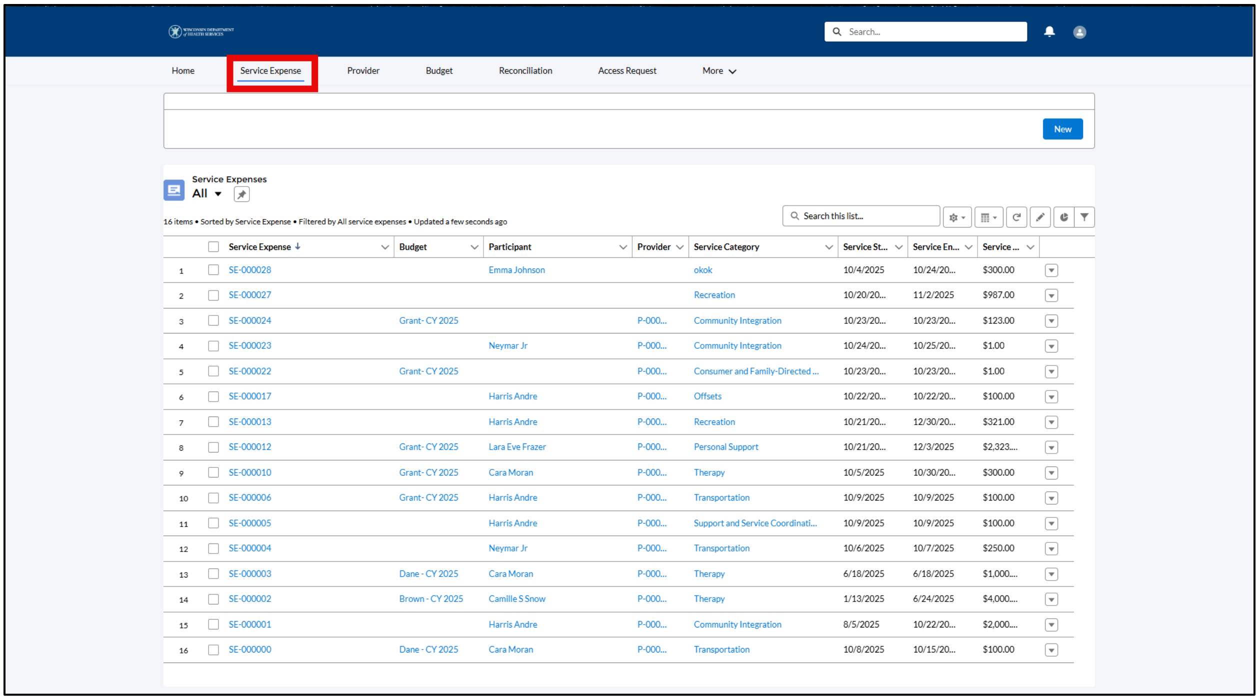
3.1 Service Expense Page

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

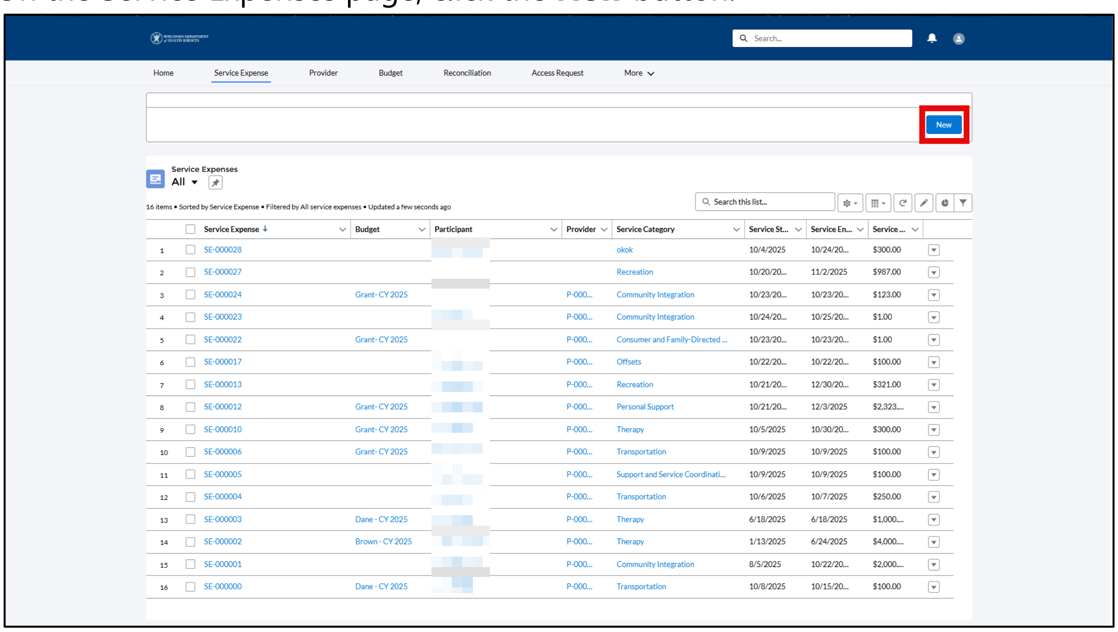
List views are lists of filtered records in a table format allowing users to view and manage data based on specific criteria. Use these to make finding records easier in categories.

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.

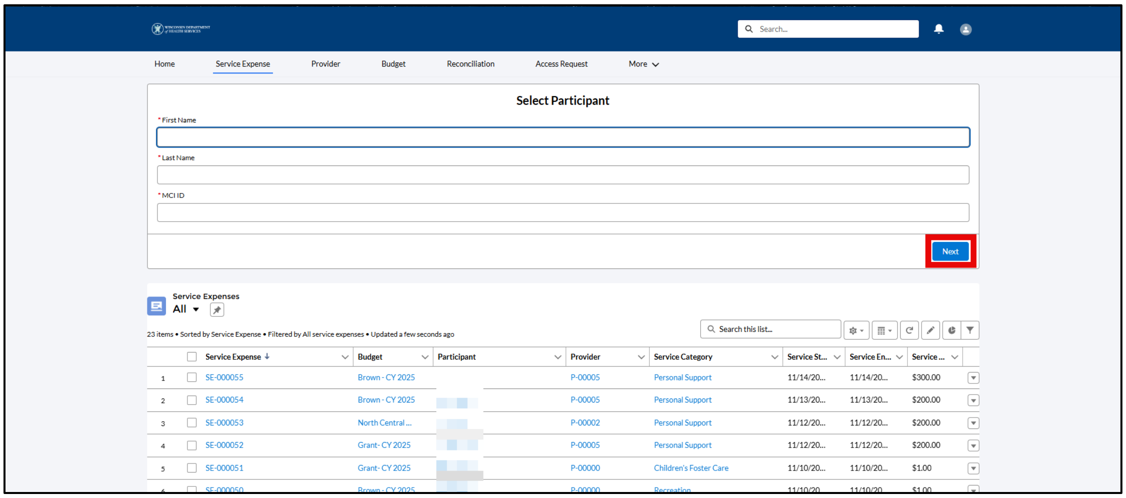


3.1.2 Creating a Service Expense – Selecting a Participant

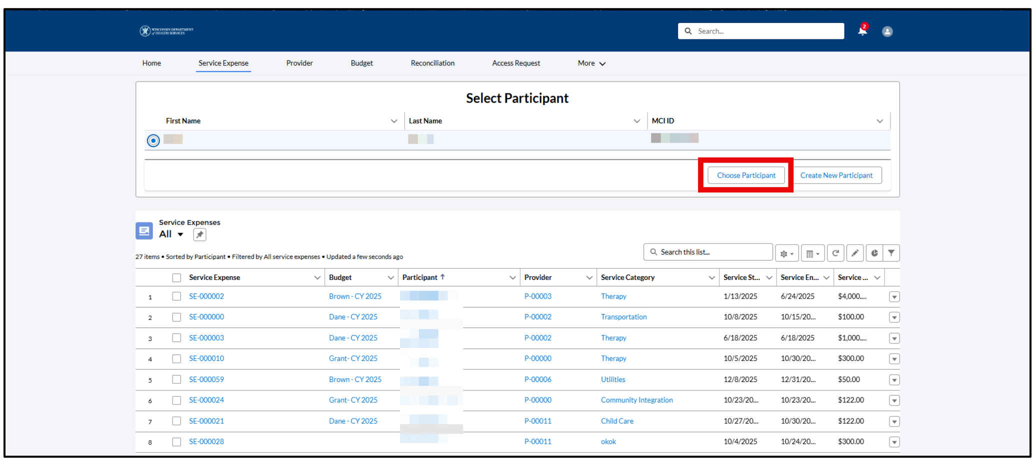
1. On the Service Expenses page, click the **New** button.



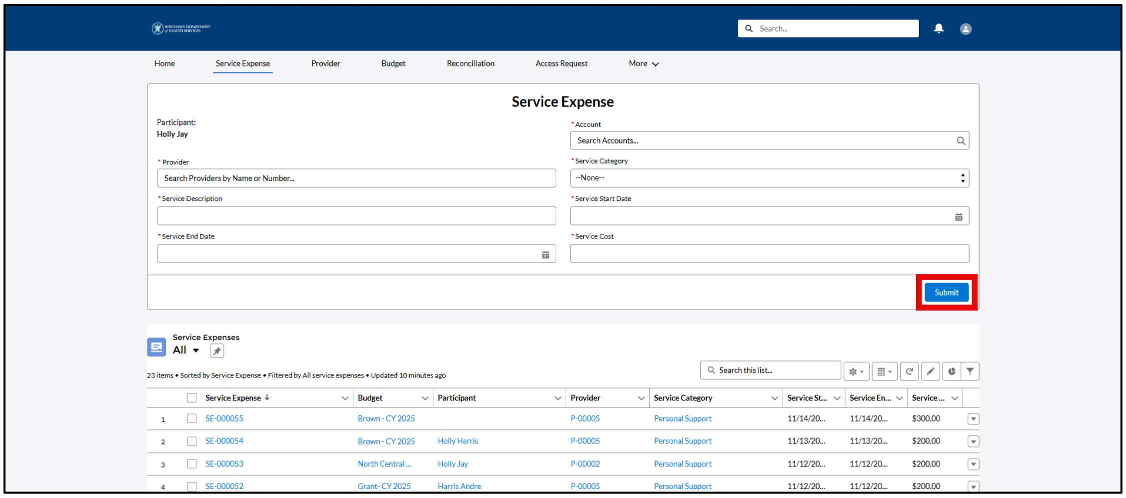
2. Enter the participant's first and last name and associated MCI ID, then click **Next**.



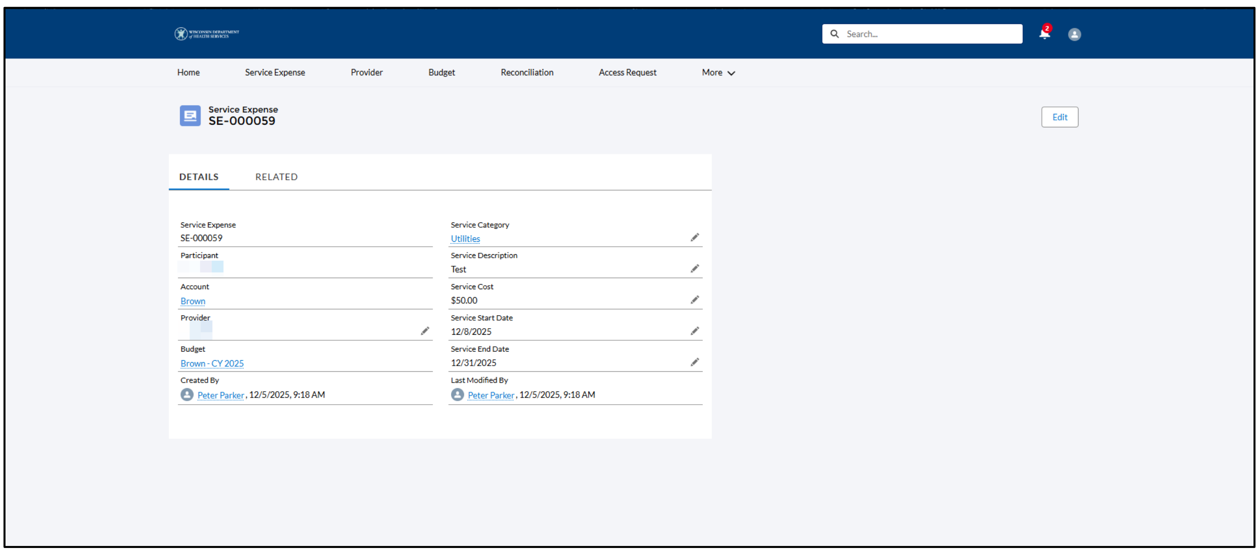
Once the participant is discovered in the system, select the radio button next to the participant's name and select **Choose Participant**.



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.

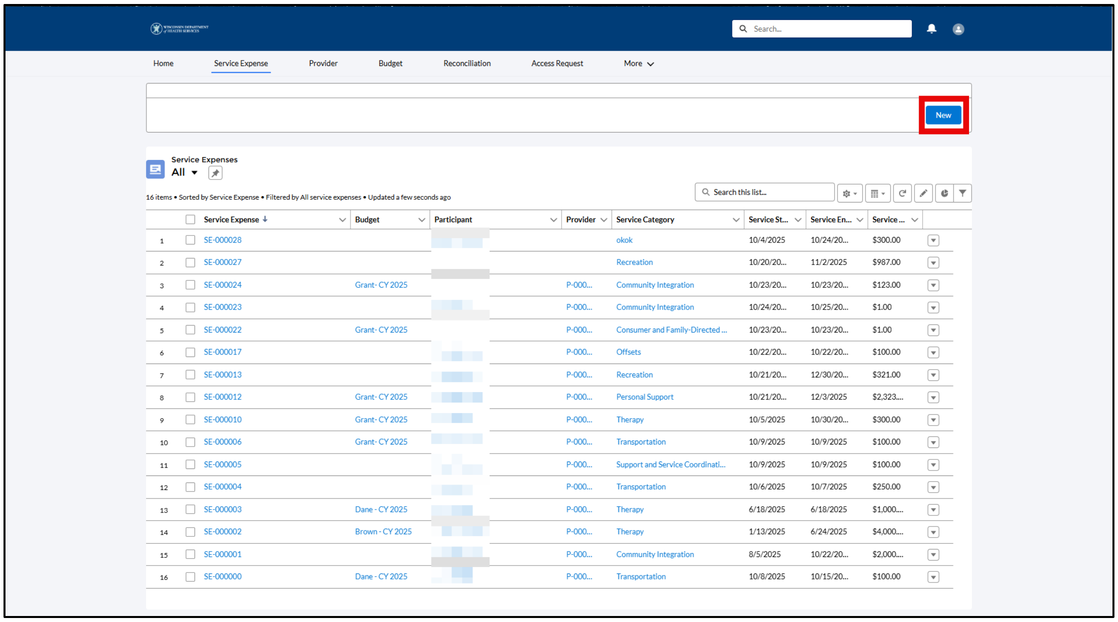


Click **Submit** to save the record and submit to DHS. Service expenses are submitted against your county's annual budget. Click 'Home' to navigate back to the main page.

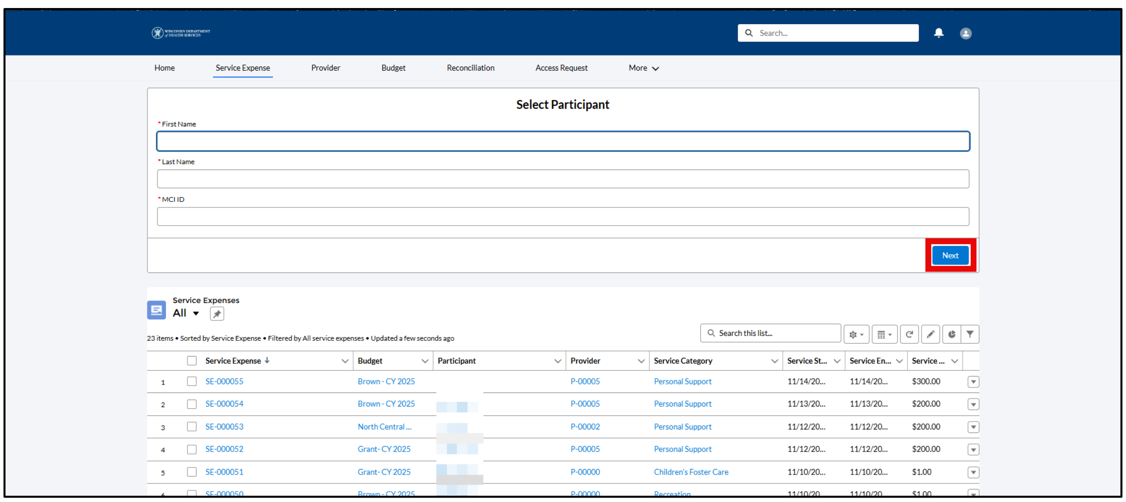


3.1.3 Creating a Service Expense – Create New Participant

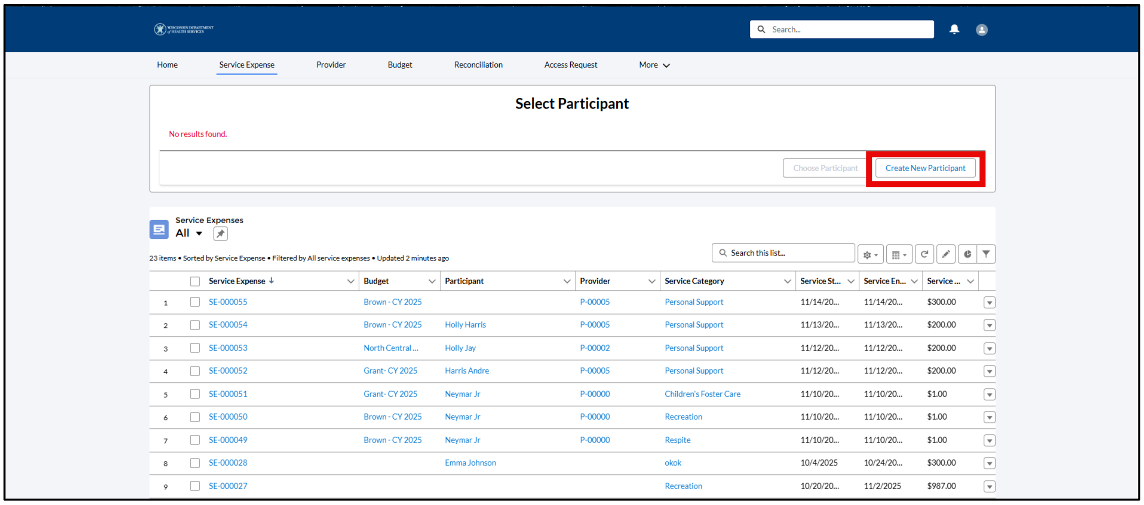
1. On the Service Expenses page, click the **New** button.



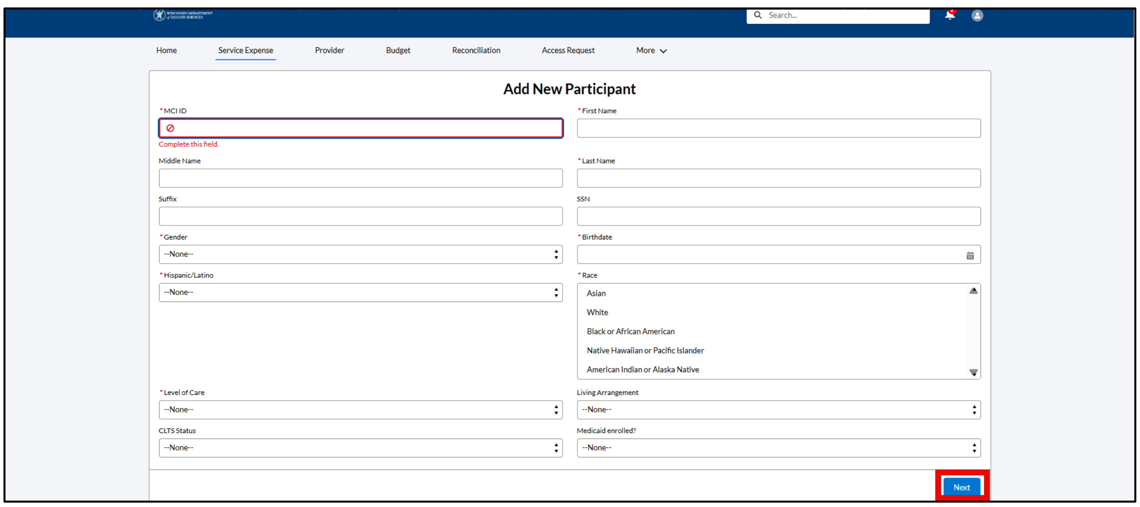
2. Enter the participant's first and last name and associated MCI ID. If the individual is a new participant, continue to click **Next**.



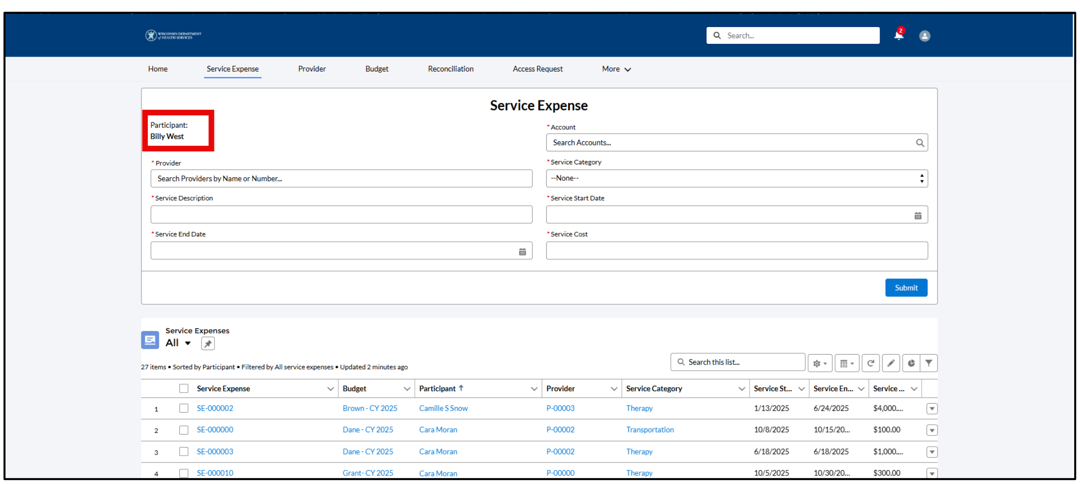
3. The system will acknowledge there are no records for the newly typed in data and prompt the user to create the participant record. Click **Create New Participant**.



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.

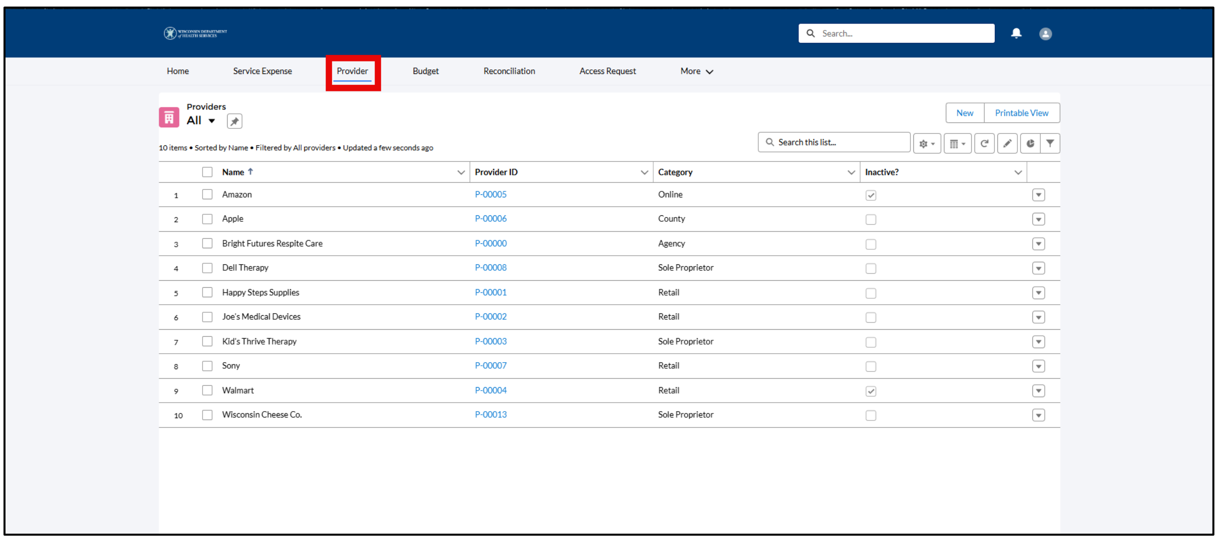


5. Continue with creating the Service Expense record by choosing the appropriate account (county) and service category from the dropdown menus. Input a service description, the start and end dates, and the service cost. **Note:** Service expense dates should be typed as 'mm/dd/yyyy' or selected using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

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

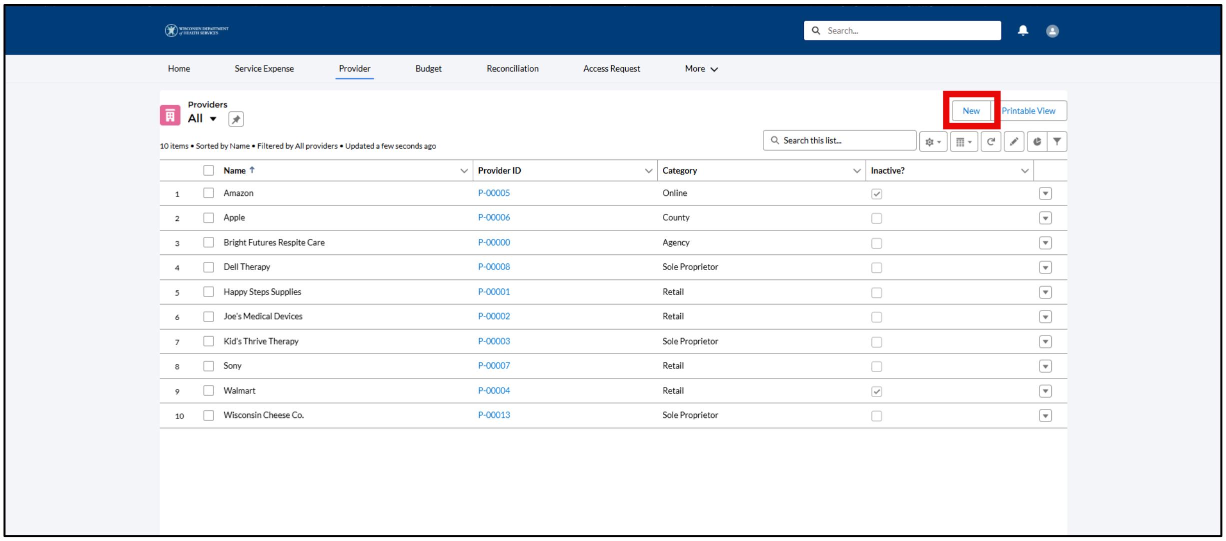
3.2 Provider Page

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

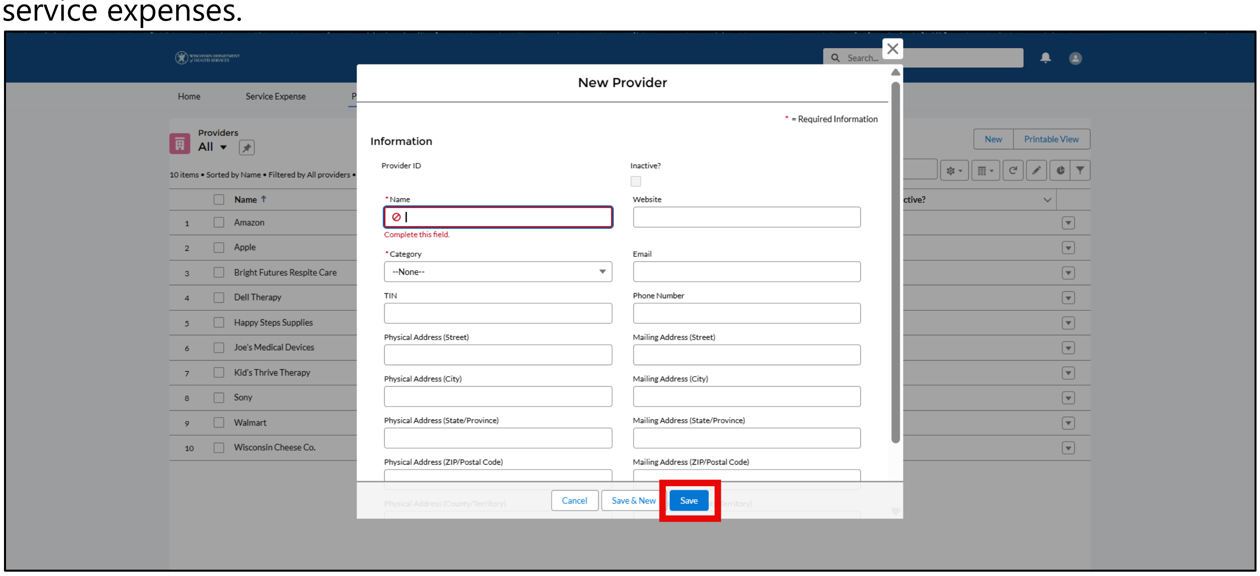


3.2.1 Creating a Provider Record

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



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.



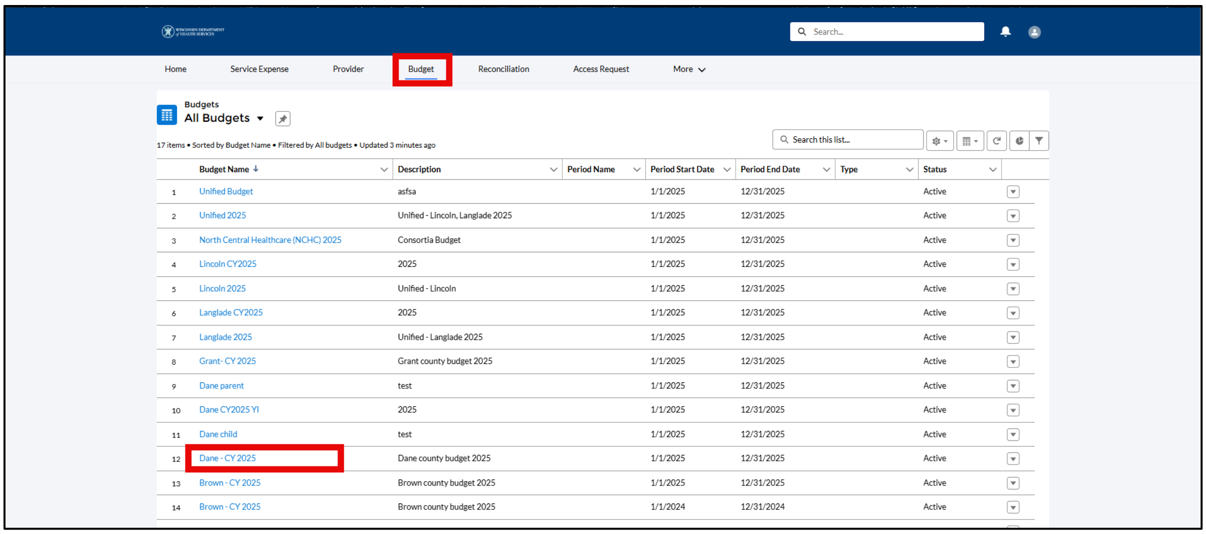
Note: A provider can also be created during the Service Expense process.

3.3 Budget Page

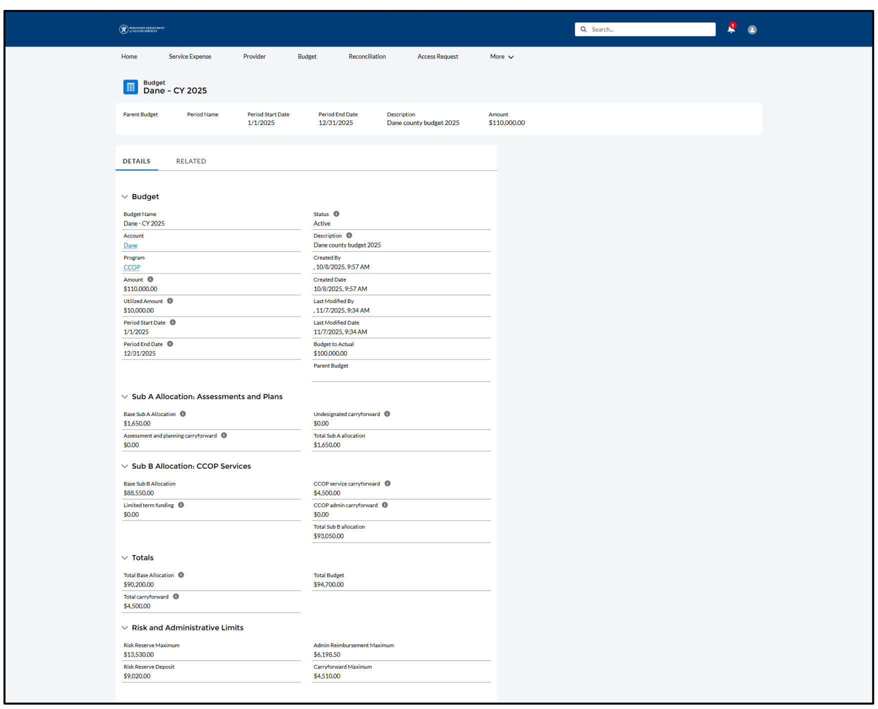
The Budget page displays each county's annual budget allocation. Budgets are released once a year by DHS administrators and determine how much funding is available for program expenses.

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.

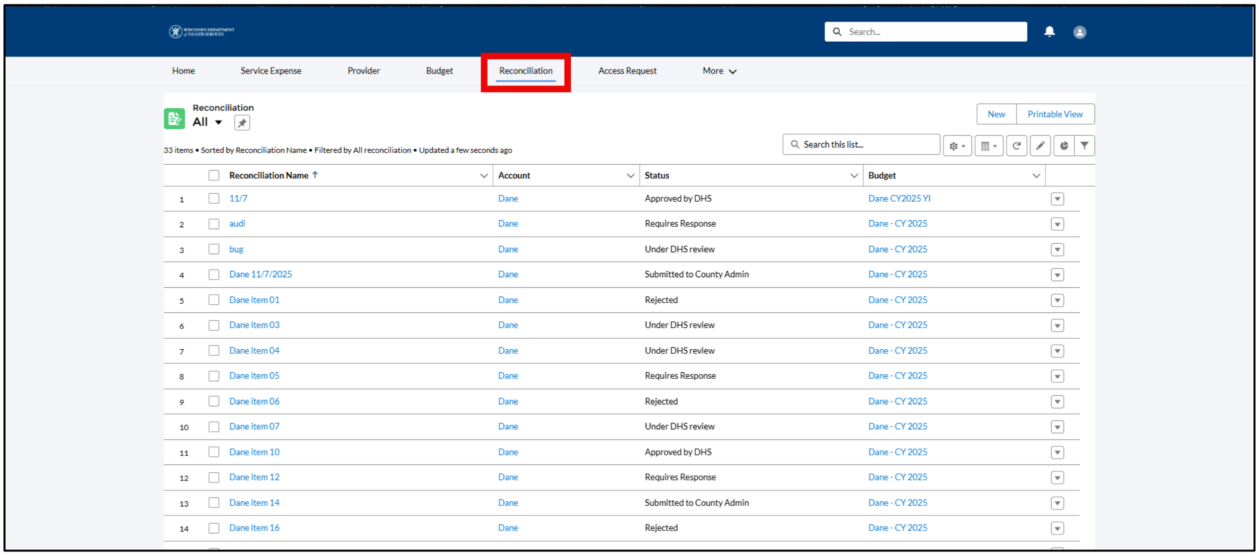


Here's an example of what a budget record looks like.



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.

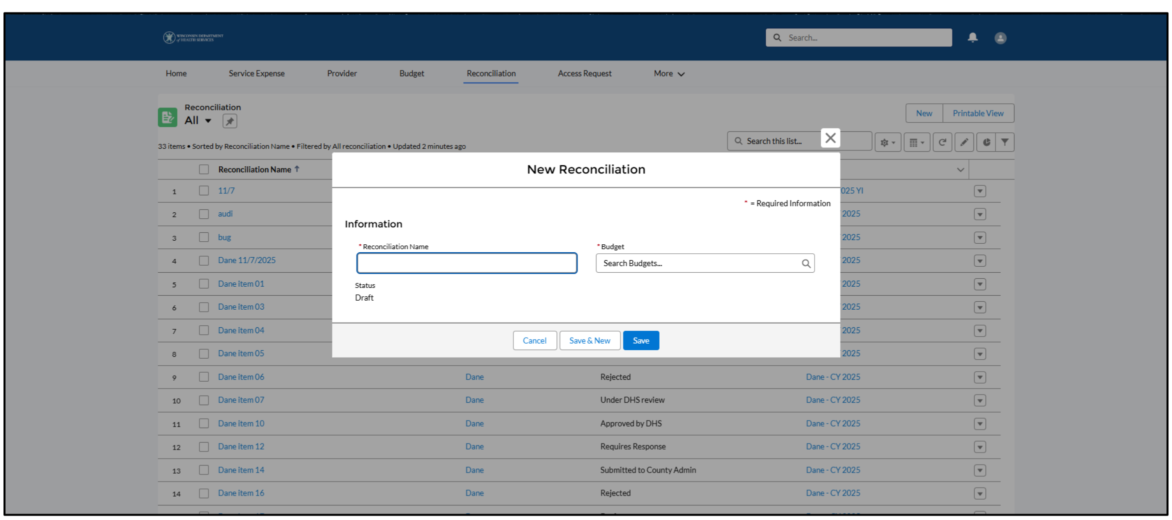


3.4.1 Working with Reconciliation Forms

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



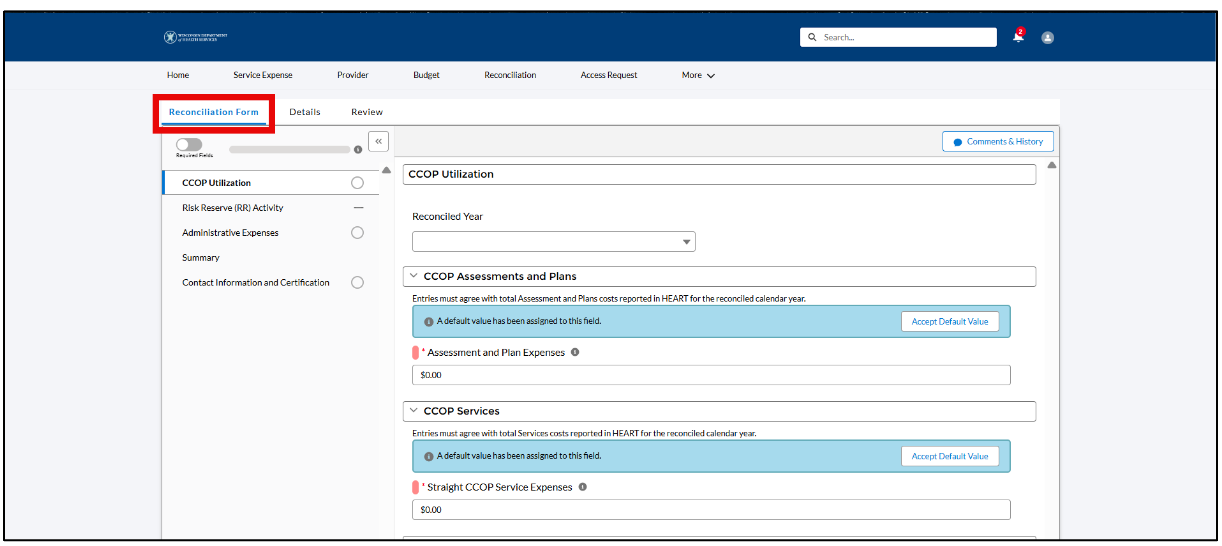
Important: The system controls when users can access specific budget records for reconciliation.

- **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).

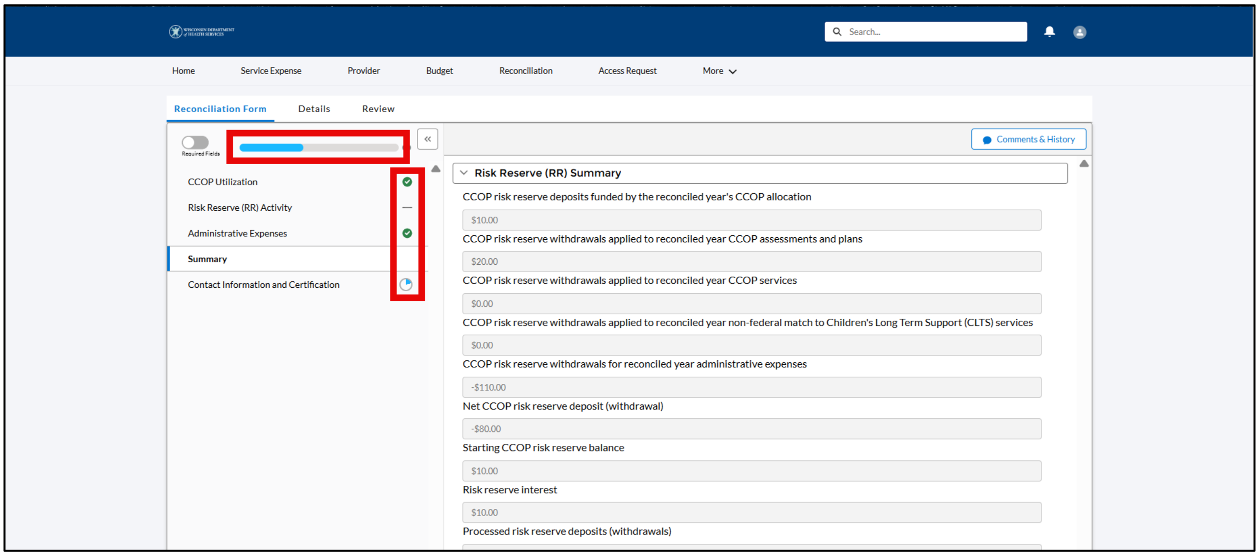
3.4.2 Reconciliation Form Tab

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.



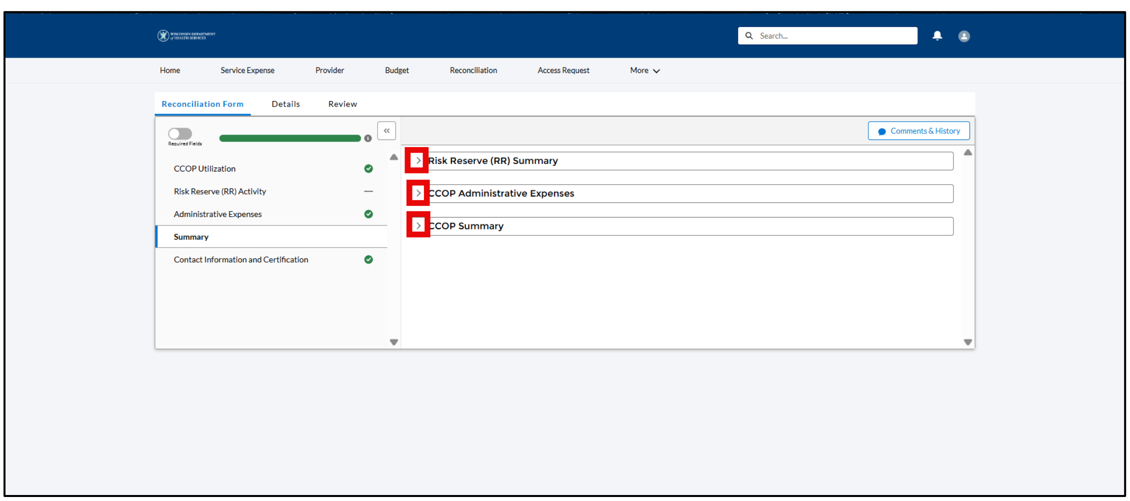
Progress Tracking

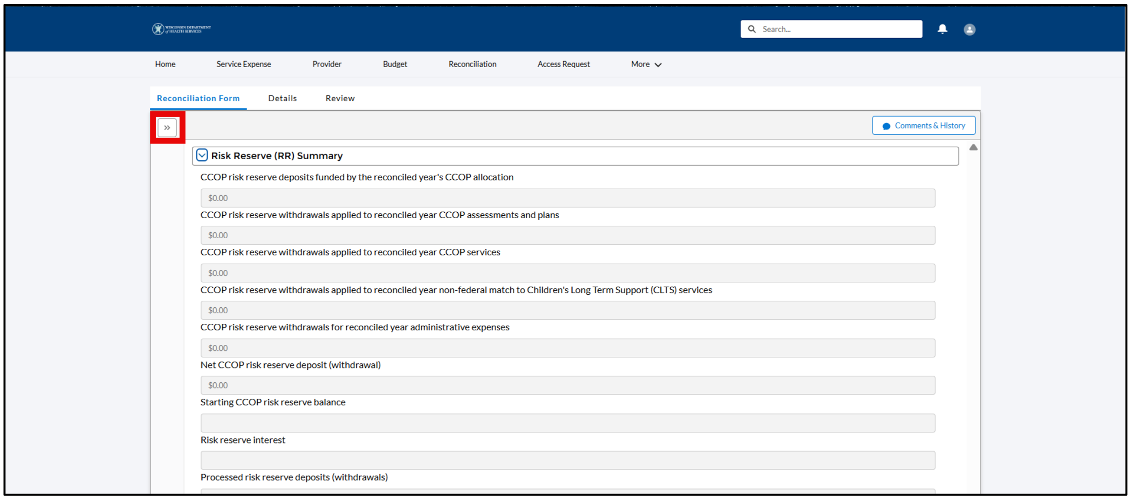
The Reconciliation Form tab includes progress indicators that show completion status for the individual sections and the overall form.



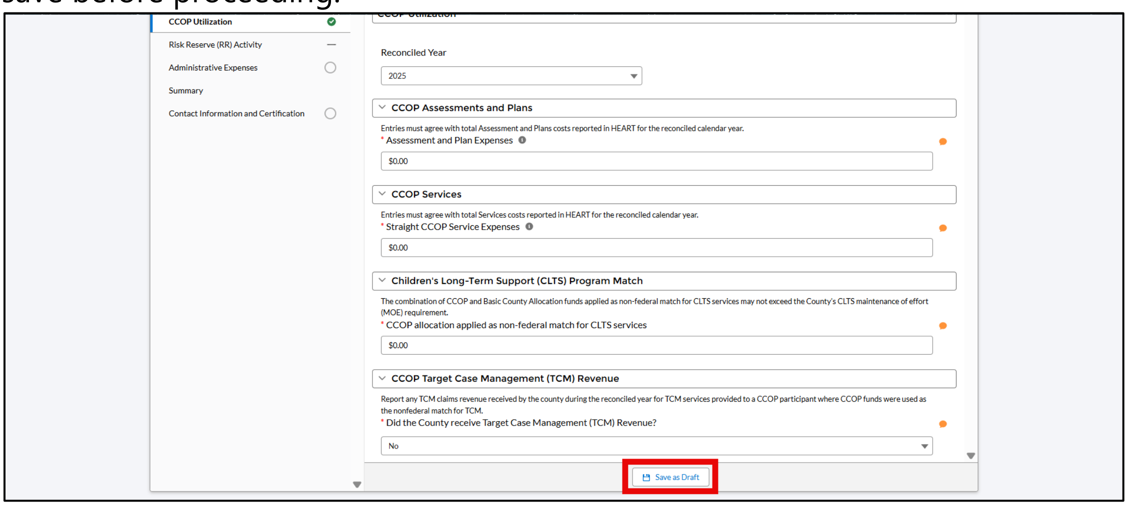
Reconciliation Form Features

- **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.



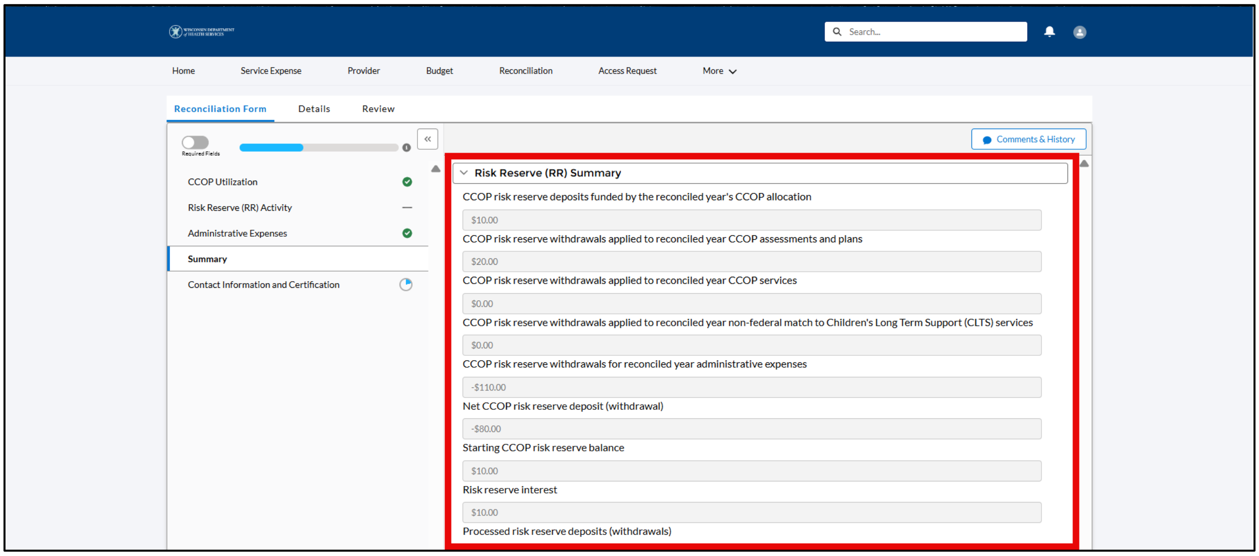
Calculated Fields

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

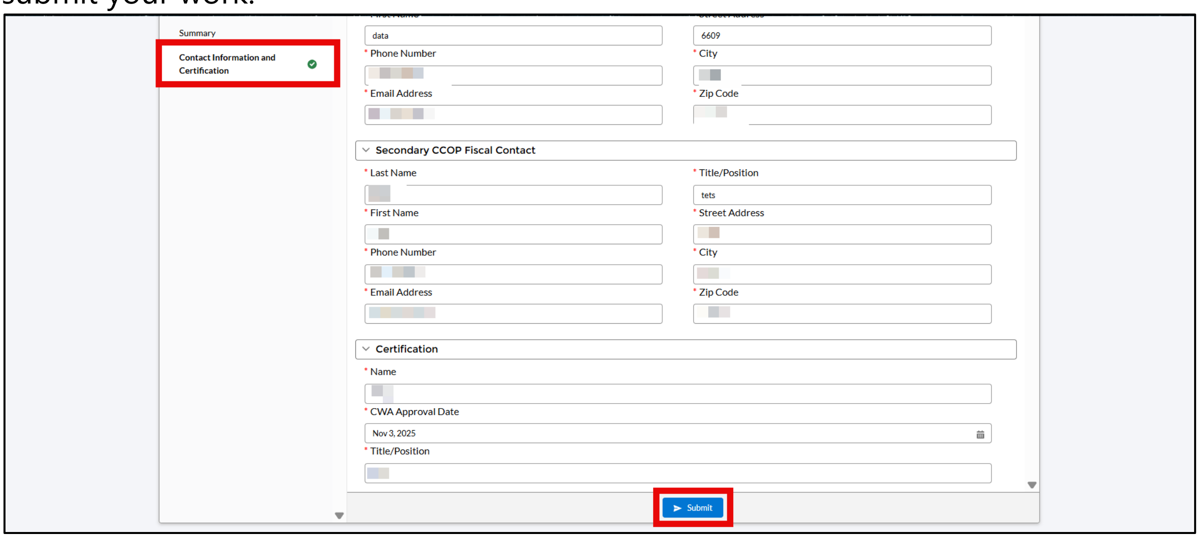
- Ending CCOP risk reserve balance



Conditional Questions

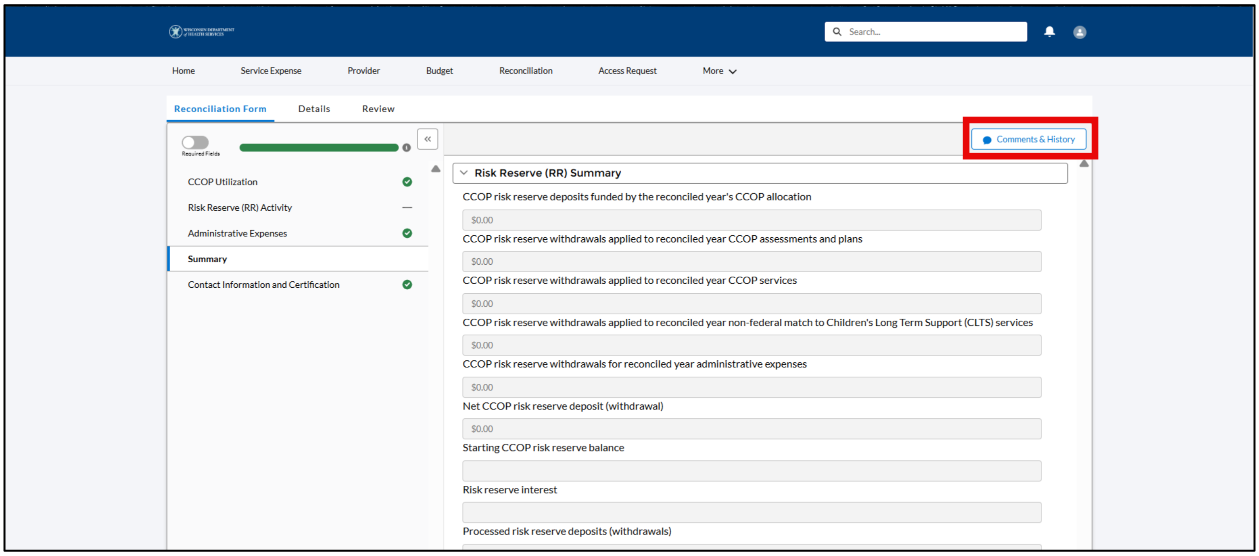
Certain fields may appear based on your answers to conditional questions, such as whether your county maintains a risk reserve.

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



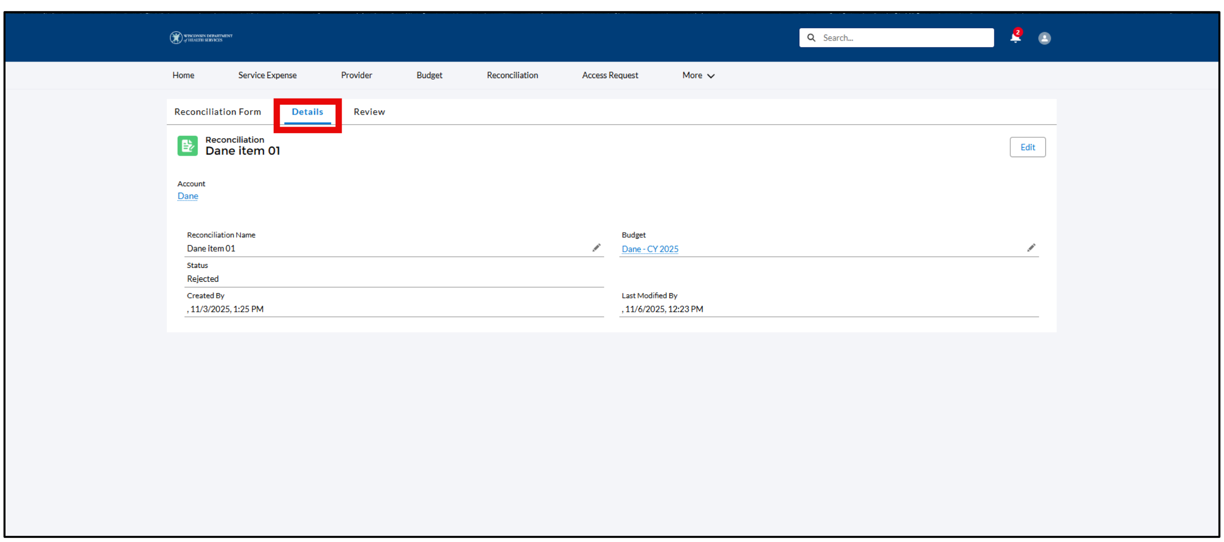
Once a county user submits a form, the county admin will be notified and review the form. County admins can approve or reject. When a county admin approves and submits the reconciliation form, DHS will review and either approve or reject it. County admins and DHS may add comments requesting clarification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

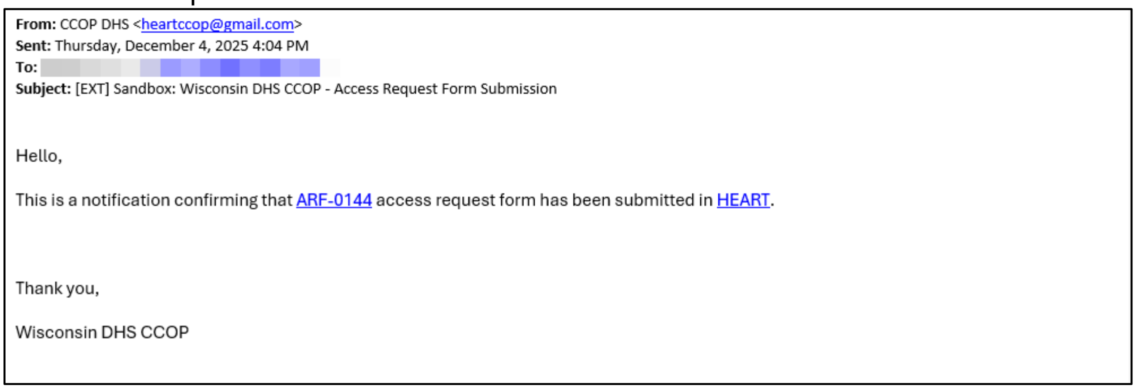


3.4.3 County Admin Review Process

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:



From: CCOP DHS <heartccop@gmail.com>
Sent: Thursday, December 4, 2025 4:04 PM
To:
Subject: [EXT] Sandbox: Wisconsin DHS CCOP - Access Request Form Submission

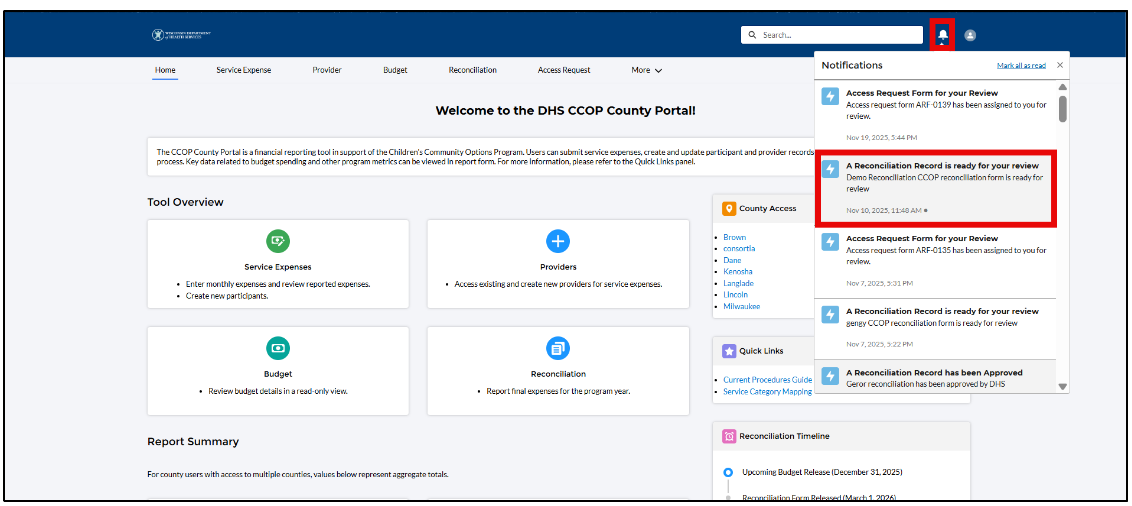
Hello,

This is a notification confirming that ARF-0144 access request form has been submitted in HEART.

Thank you,

Wisconsin DHS CCOP

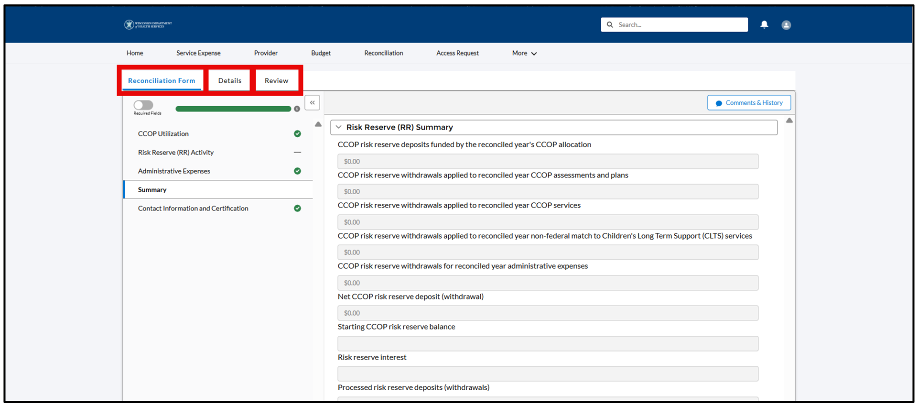
- The portal notification appears in the system (bell icon) and includes details about the submitted record
- Clicking the notification directs the admin to the reconciliation record



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

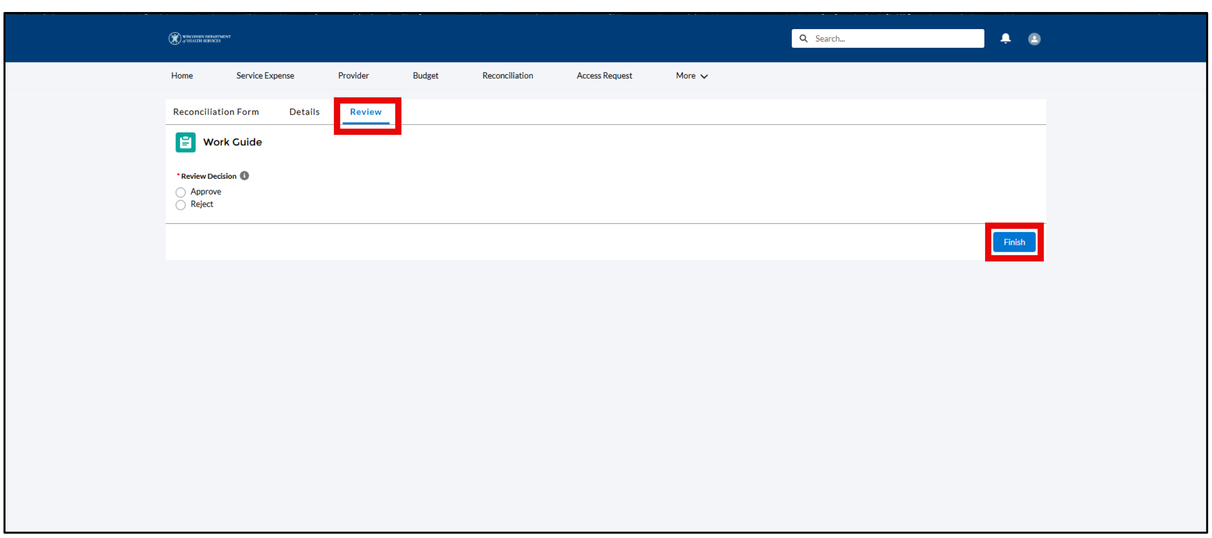
1. County admins review all tabs of the submitted form
2. They look through and verify what the county user has input
3. On the Review tab, they provide the review decision



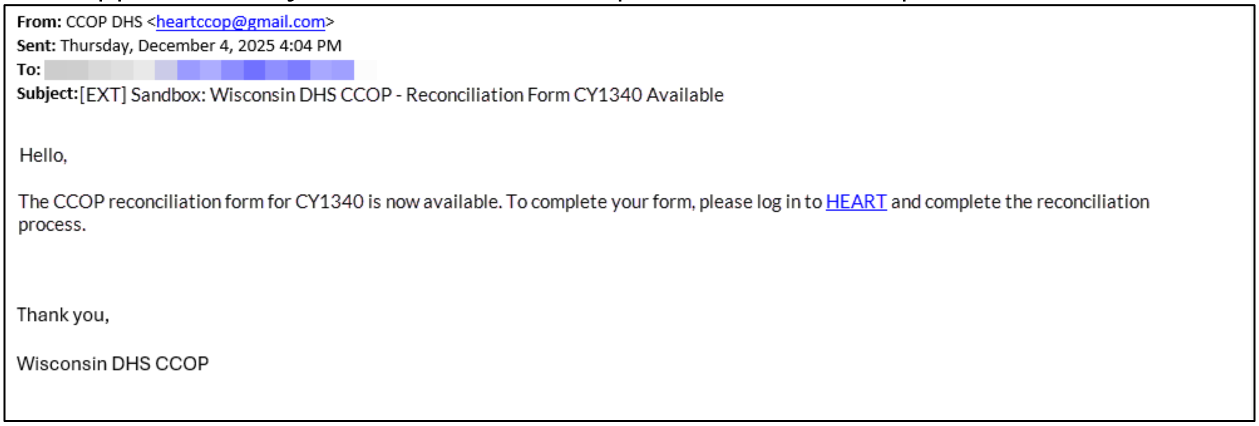
Review Decisions

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



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:



From: CCOP DHS <heartccop@gmail.com>
Sent: Thursday, December 4, 2025 4:04 PM
To:
Subject: [EXT] Sandbox: Wisconsin DHS CCOP - Reconciliation Form CY1340 Available

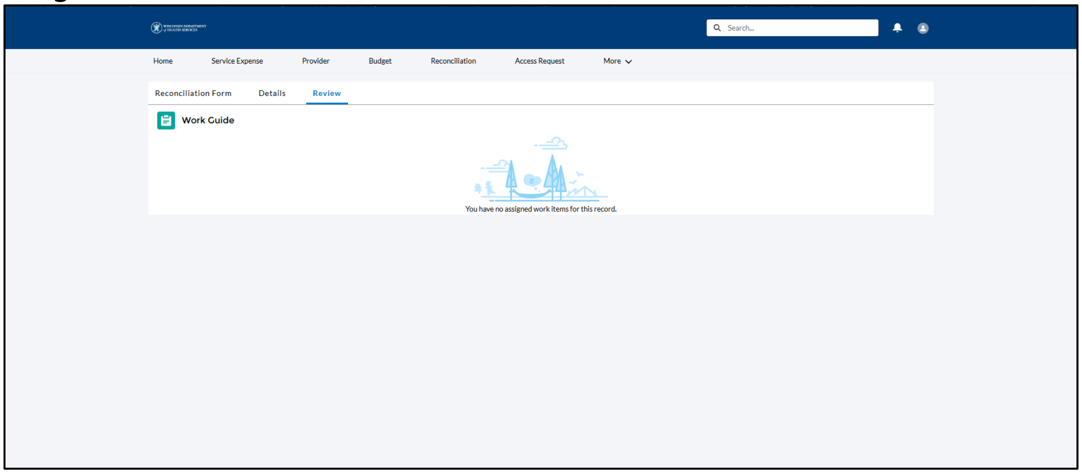
Hello,

The CCOP reconciliation form for CY1340 is now available. To complete your form, please log in to HEART and complete the reconciliation process.

Thank you,

Wisconsin DHS CCOP

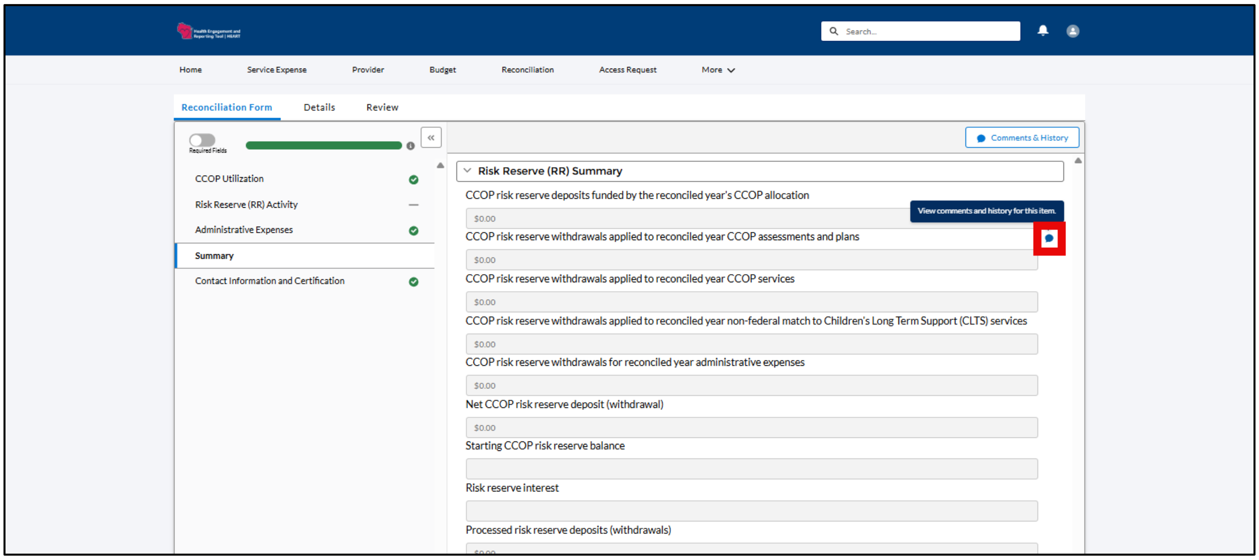
Note: When a reconciliation form is approved or rejected, the work guide has no assigned work items for the record.



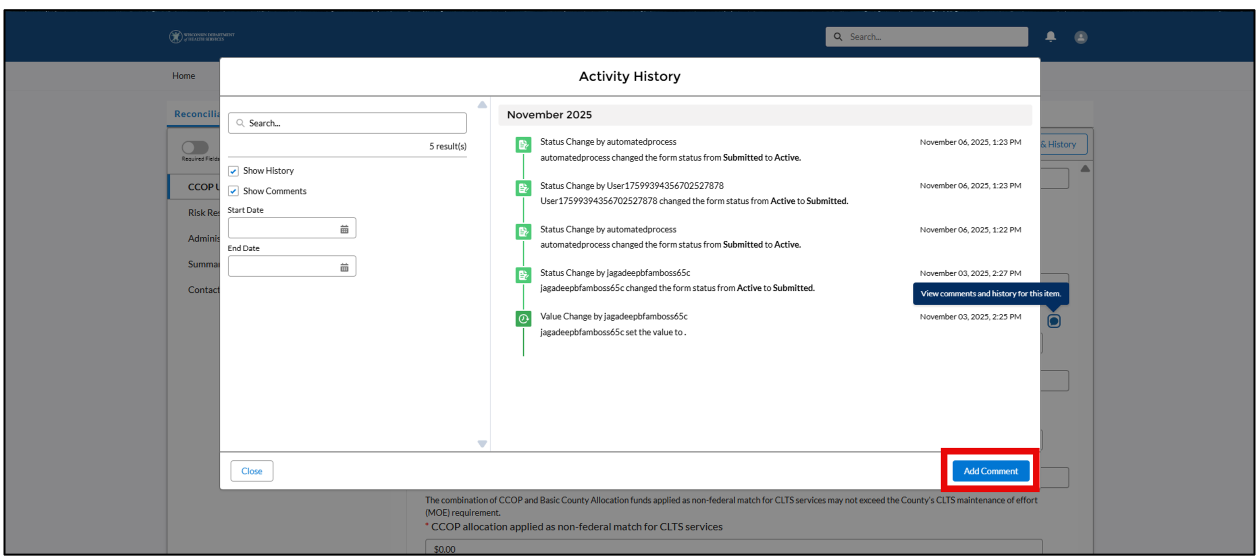
3.4.4 Adding Comments as County Admins

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.

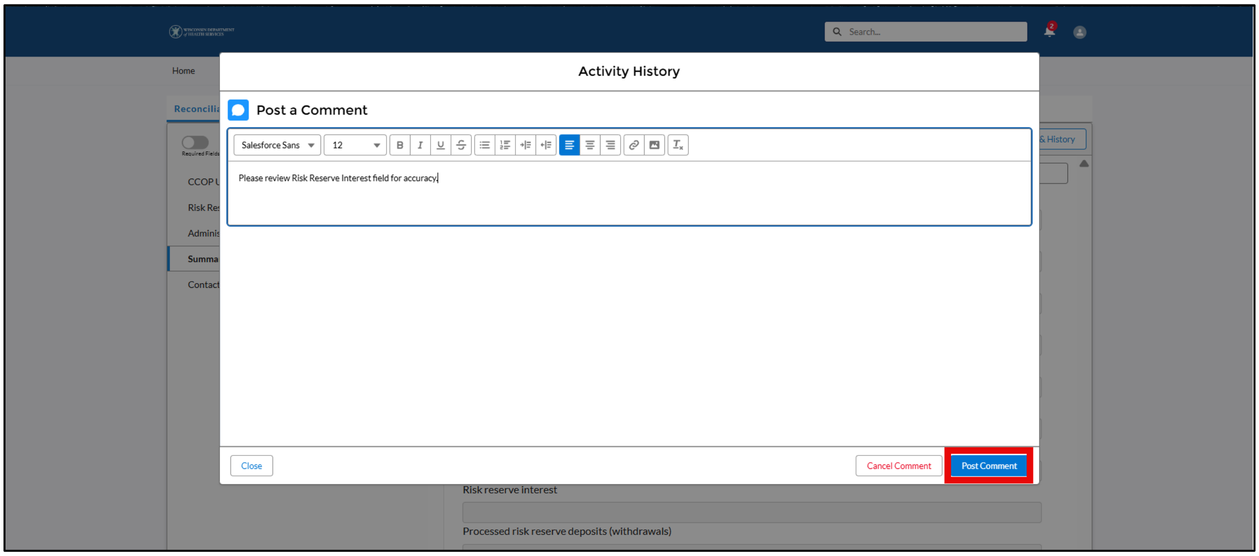


2. Select **Add Comment**.



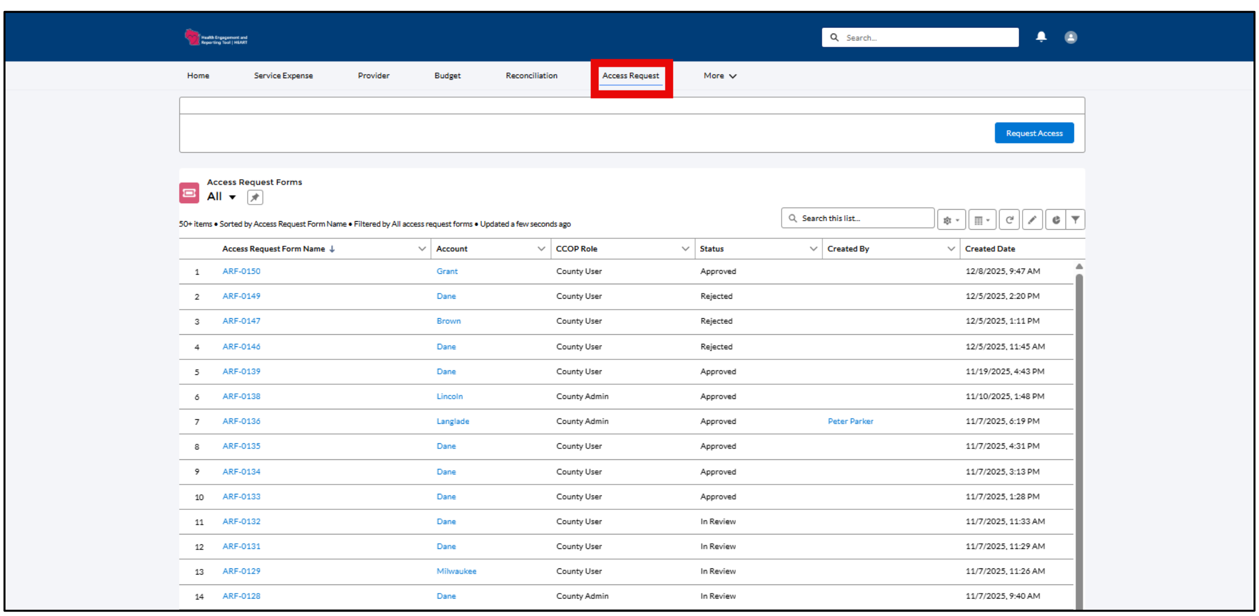
A text editor will appear ready for any observations that need to be posted to the county user.

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.



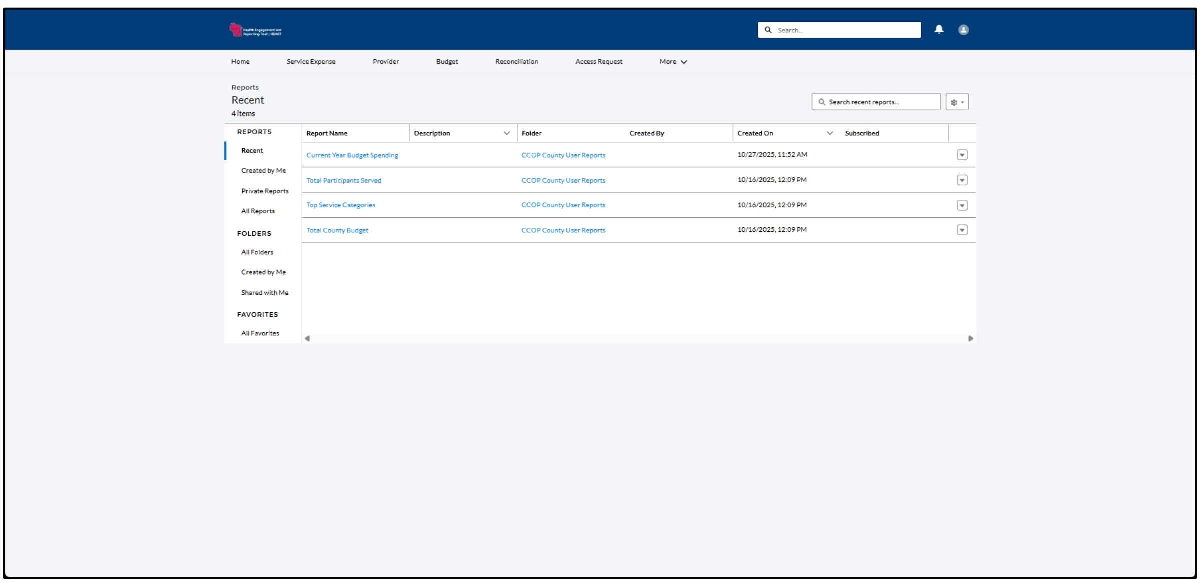
3.6 Reports Page

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.

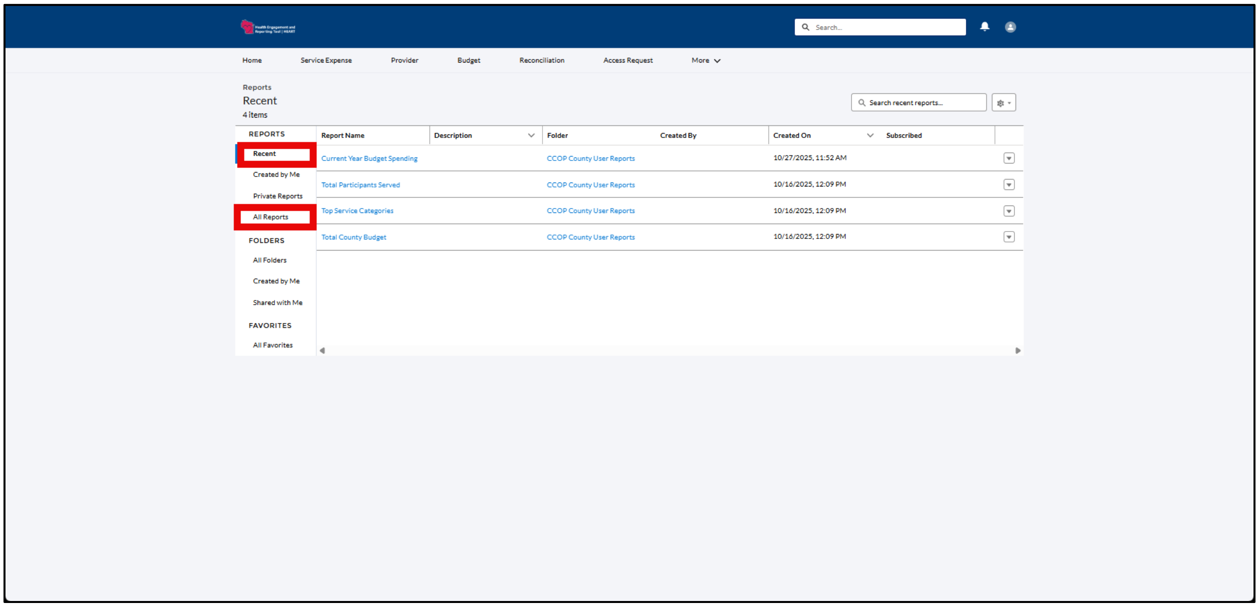
What you'll see:

- **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.

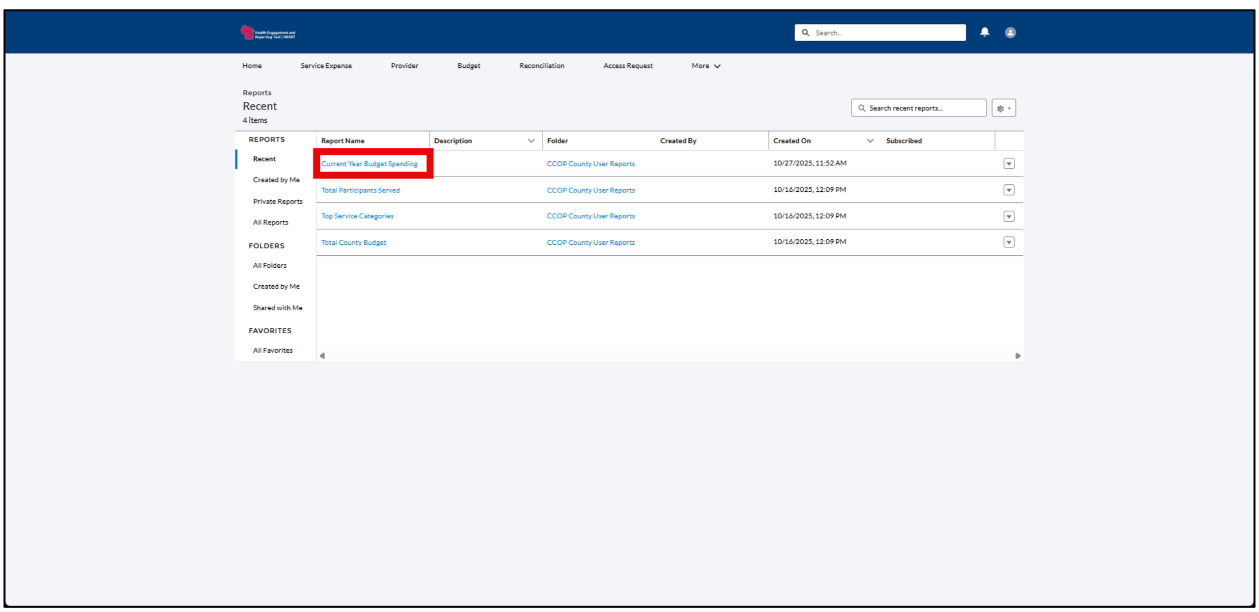


To view a report

1. Go to Recent or All Reports.



2. Click the report name.



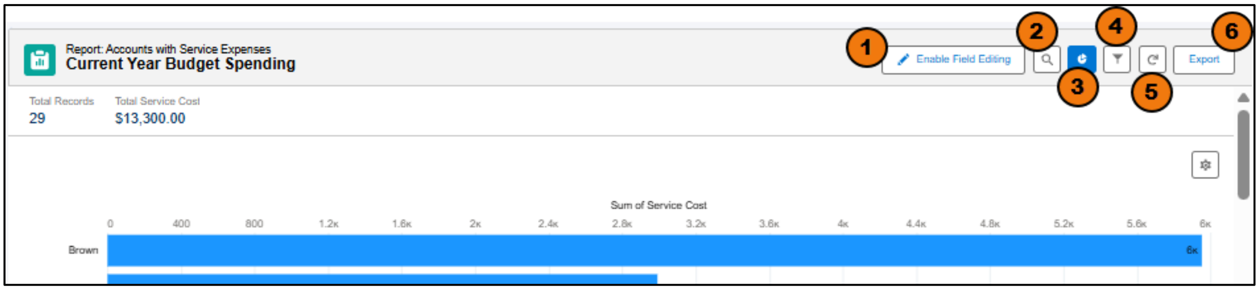
Note: Users do not have the ability to create reports or folders; they can only view them.

3.6.1 Managing Reports

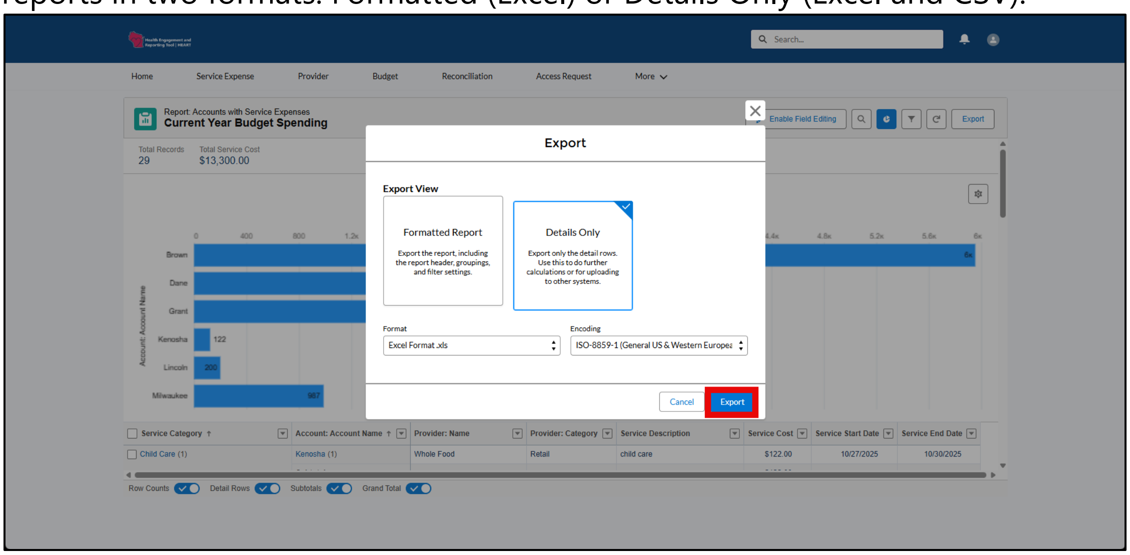
Each report includes:

- 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.