



**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

## **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.

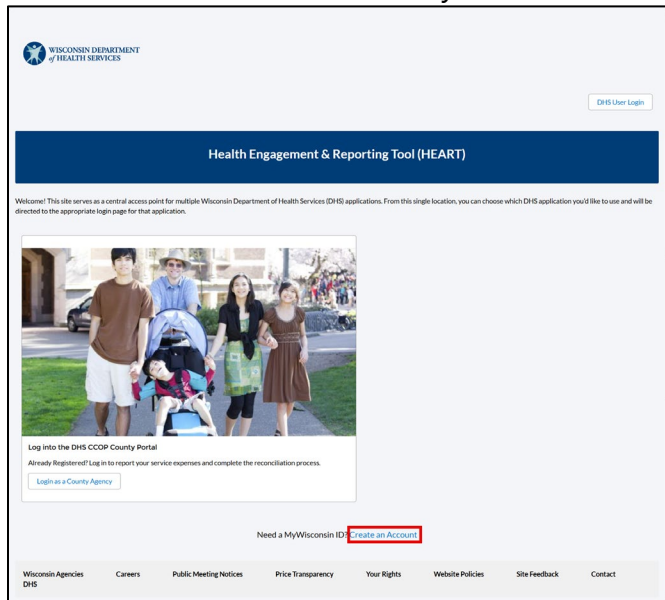
## 2. Logging in for the First Time

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

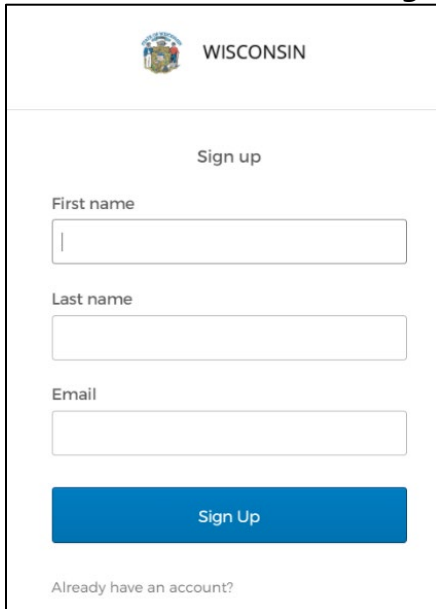
1. Go to the landing page at <https://bfamboss.my.site.com/HEART> and select **Create an Account** next to "Need a MyWisconsin ID?"



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

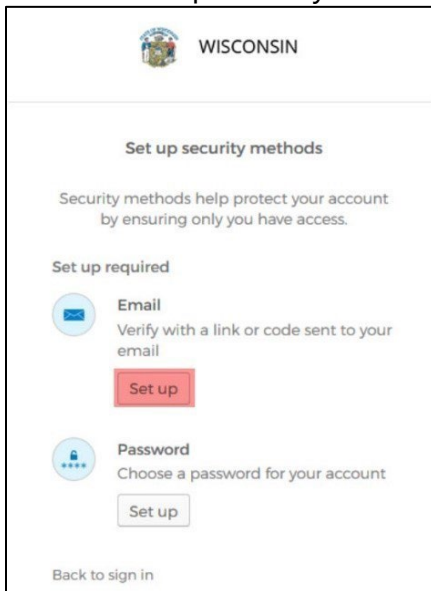
A screenshot of the "MyWisconsin ID Sign In" page. The page has a white background with the Wisconsin state seal and the word "WISCONSIN" at the top. The title "MyWisconsin ID Sign In" is centered. Below the title, the label "Email address" is followed by the placeholder text "example - user@domain.com". A text input field is provided for the email address. Below the input field is a large blue button labeled "Next". At the bottom left, there are two links: "Unlock account?" and "Help". At the bottom center, a red button labeled "Don't have an account? Sign up" is visible.

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



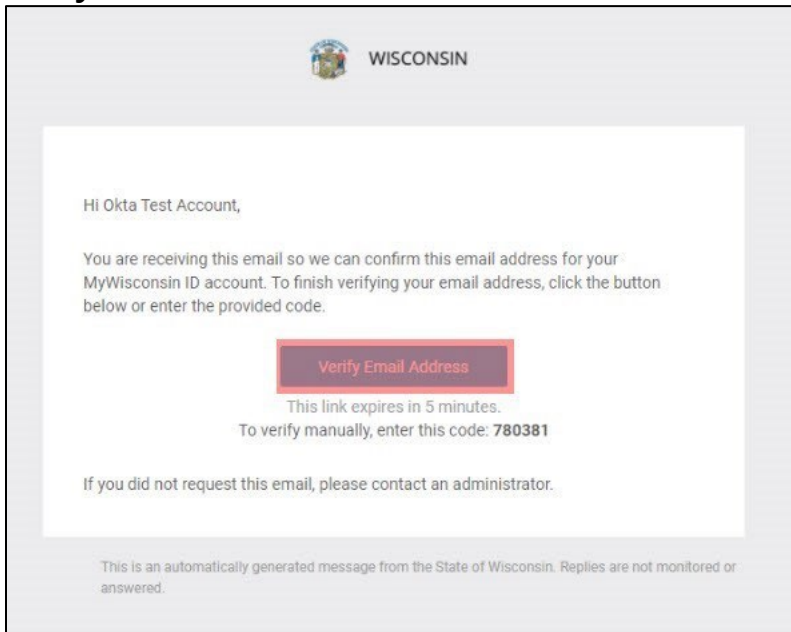
The screenshot shows the "Sign up" page for the WISCONSIN portal. At the top is the WISCONSIN logo and the word "WISCONSIN". Below this is a horizontal line, followed by the heading "Sign up". There are three input fields: "First name", "Last name", and "Email". Below the "Email" field is a blue "Sign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

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

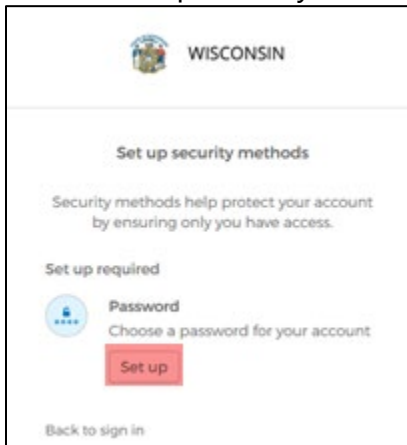


The screenshot shows the "Set up security methods" page for the WISCONSIN portal. At the top is the WISCONSIN logo and the word "WISCONSIN". Below this is a horizontal line, followed by the heading "Set up security methods". A sub-heading reads: "Security methods help protect your account by ensuring only you have access." Below this is the section "Set up required". There are two options: "Email" and "Password". The "Email" option has a blue envelope icon and a red "Set up" button. The "Password" option has a blue lock icon and a white "Set up" button. At the bottom, 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.

Set up

**Okta Verify**


Okta Verify is an authenticator app, installed on your phone, used to prove your identity

Set up

**Phone**

Verify with a code sent to your phone

Set up

**Security Key or Biometric Authenticator**

Use a security key or a biometric authenticator to sign in

Set up

[Back to sign in](#)





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


**Set up security methods**

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

**Set up optional**

 **Google Authenticator**  
Enter a temporary code generated from the Google Authenticator app.  
[Set up](#)

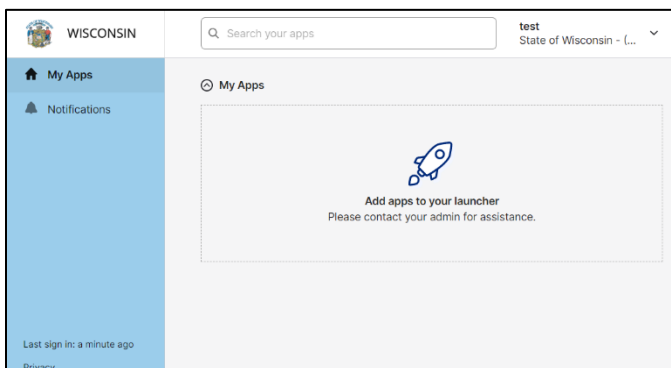
 **Okta Verify**  
Okta Verify is an authenticator app, installed on your phone, used to prove your identity  
[Set up](#)

 **Phone**  
Verify with a code sent to your phone  
[Set up](#)

**Finish**

[Back to sign in](#)

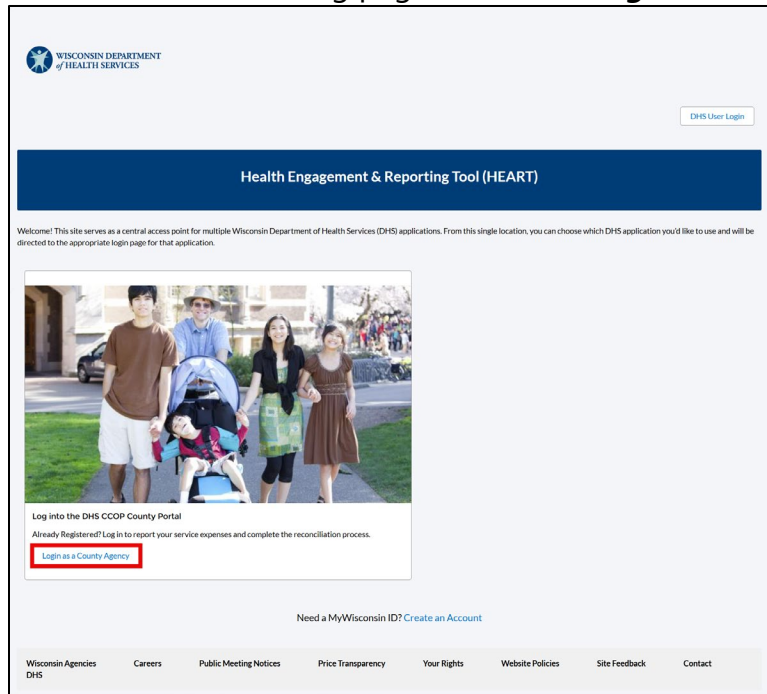
This will complete the setup of the MyWisconsin ID account registration. Close the My Apps dashboard and log in to the CCOP County Portal



**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

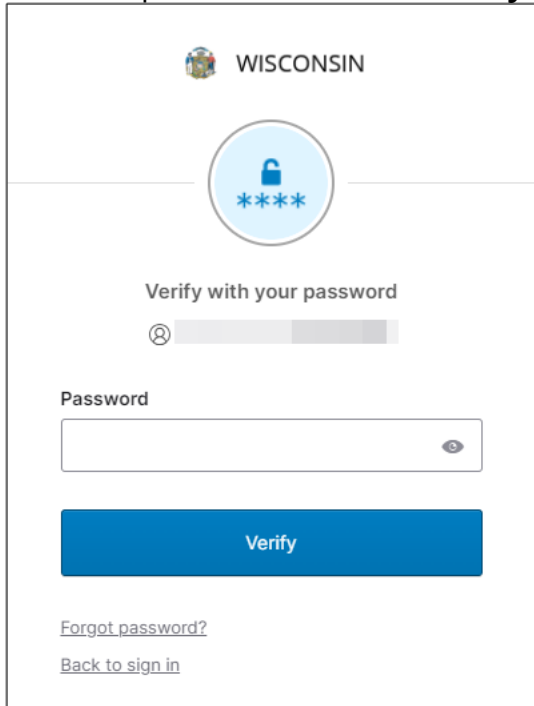
1. Go to the landing page and select **Login as a County Agency**.



**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).

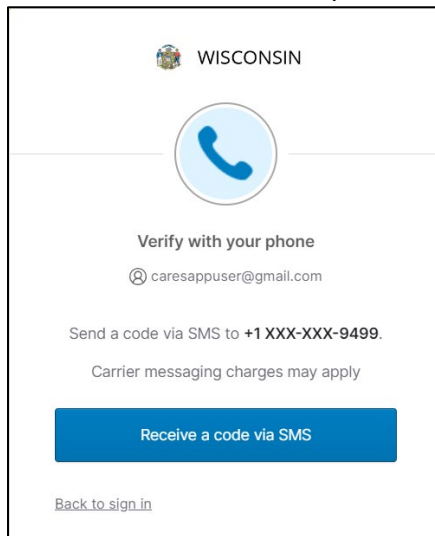
2. Enter the MyWisconsin ID.

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



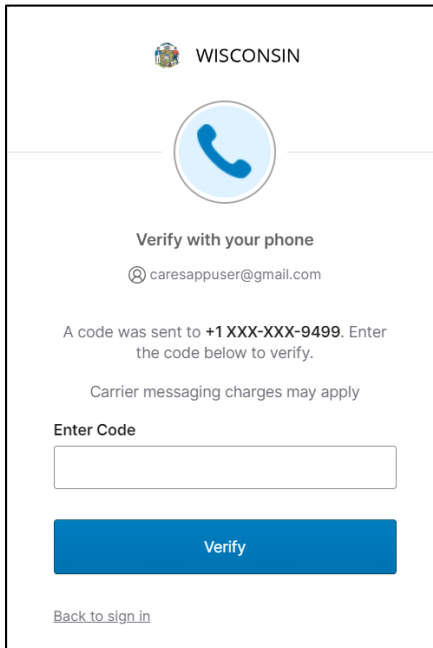
The screenshot shows the WISCONSIN login interface. At the top is the WISCONSIN logo. Below it is a circular icon with a blue padlock and four asterisks. The text "Verify with your password" is centered. Underneath is a greyed-out email field with an @ symbol. Below that is a "Password" label and a text input field with a toggle eye icon on the right. A large blue "Verify" button is positioned below the password field. At the bottom, 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 containing "caresappuser@gmail.com". Below that is the text "Send a code via SMS to +1 XXX-XXX-9499." followed by "Carrier messaging charges may apply". A large blue button labeled "Receive a code via SMS" is positioned below the text. At the bottom, there is a link: "Back to sign in".

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

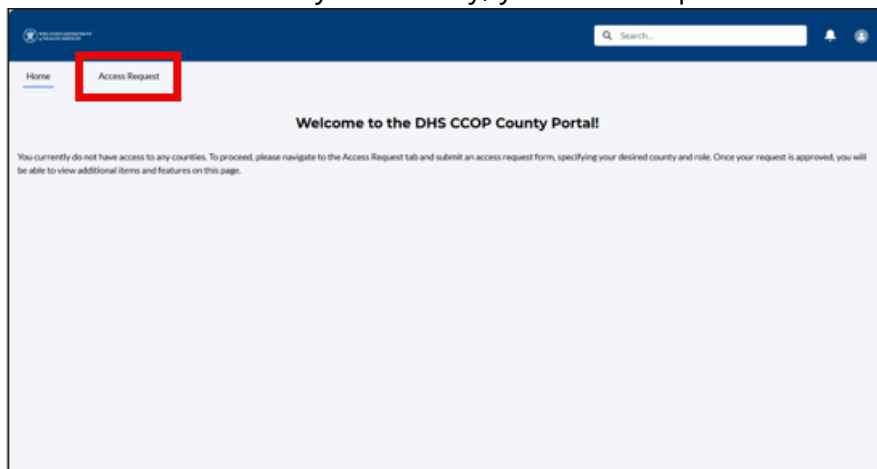


The image shows a mobile application interface for WISCONSIN. At the top is the WISCONSIN state logo and the word "WISCONSIN". Below this is a large blue telephone handset icon inside a circle. Underneath the icon, the text reads "Verify with your phone" followed by the email address "caresappuser@gmail.com". A message states: "A code was sent to +1 XXX-XXX-9499. Enter the code below to verify." Below this is a line of text: "Carrier messaging charges may apply". There is a label "Enter Code" above a white rectangular input field. Below the input field is a large blue button with the word "Verify" in white. At the bottom left, there is a link that says "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.

The screenshot shows the 'Access Request' page in a web application. At the top, there is a search bar and navigation links for 'Home' and 'Access Request'. Below the navigation bar, there is a 'Request Access' button highlighted with a red rectangular box. Underneath, there is a section titled 'Access Request Forms' with a dropdown menu set to 'All'. Below this, there is a table with columns: 'Access Request Form...', 'Account', 'CCOP Role', 'Status', 'Created By', and 'Created Date'. The table is currently empty, showing '0 Items'. At the bottom of the page, there are some decorative icons.

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

The screenshot shows the 'CCOP County Admin/User Access Request Form'. The form has a title 'CCOP County Admin/User Access Request Form' and a red error message 'Please provide County and Role details\*'. Below the title, there are four dropdown menus: 'County' (with '--None--' selected), 'CCOP Role' (with '--None--' selected), 'Program' (with '--None--' selected), and 'Requestor Comments' (a text area). At the bottom right of the form, there is a blue 'Submit' button. Below the form, there is a section titled 'Access Request Forms' with a dropdown menu set to 'All'. Below this, there is a table with columns: 'Access Request Form...', 'Account', 'CCOP Role', 'Status', 'Created By', and 'Created Date'. The table is currently empty, showing '0 Items'. At the bottom of the page, there are some decorative icons.

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
<b>County Admin</b>	Authorize access requests for other county users in their county as well as perform county specific tasks	DHS
<b>County User</b>	Perform county specific tasks	Local County Admin

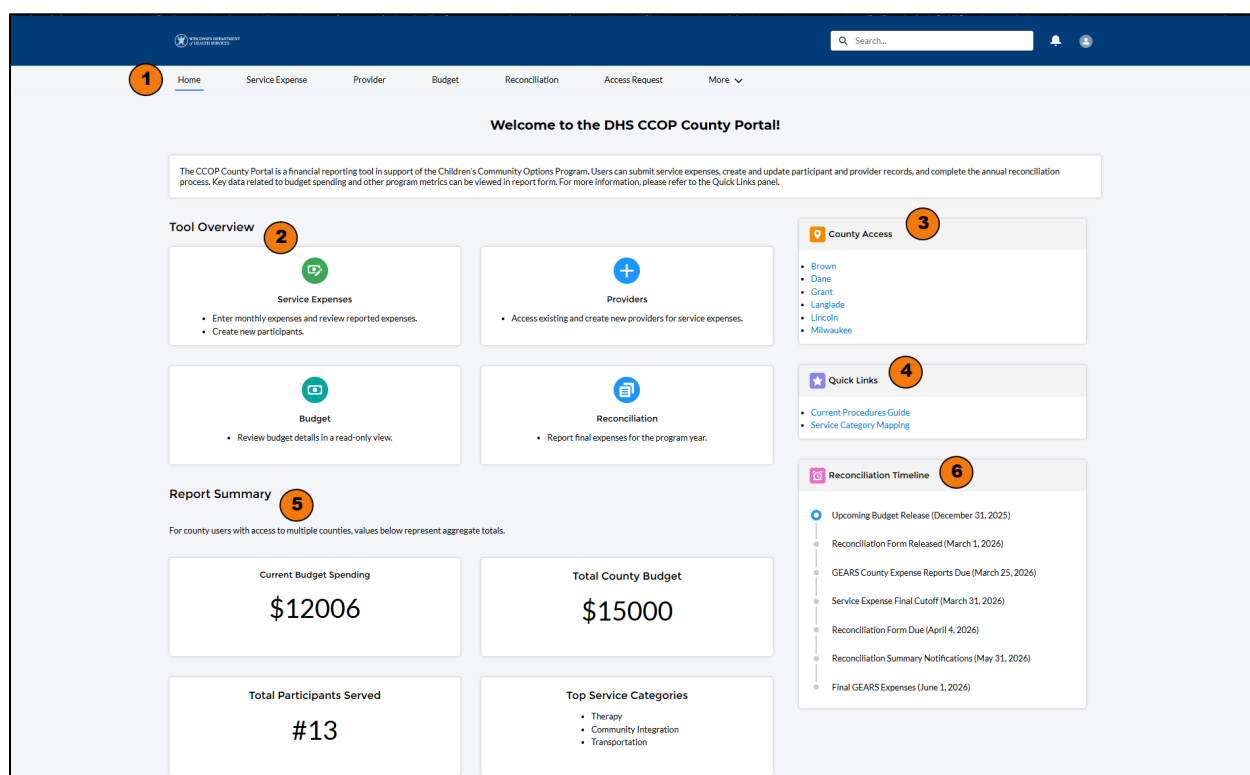
Before any other users can be approved, each county must first identify and request access for a County Admin.

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.

The screenshot shows the 'County Access' interface for 'Dane County'. The 'RELATED' tab is selected and highlighted with a red box. The interface displays several data tables:

- Budgets (5)**: A table with columns: Budget Name, Amount, Program, and Period Start Date.
 

Budget Name	Amount	Program	Period Start Date
Dane - CY 2025	\$150,000.00	CCOP	1/1/2025
Dane - CY2025 Y1	\$0.00	CCOP	1/1/2025
Dane - CHM	\$0.00	CCOP	1/1/2025
- Related Contacts (6)**: A table with columns: Contact Name, Account Name, Title, and Email.
 

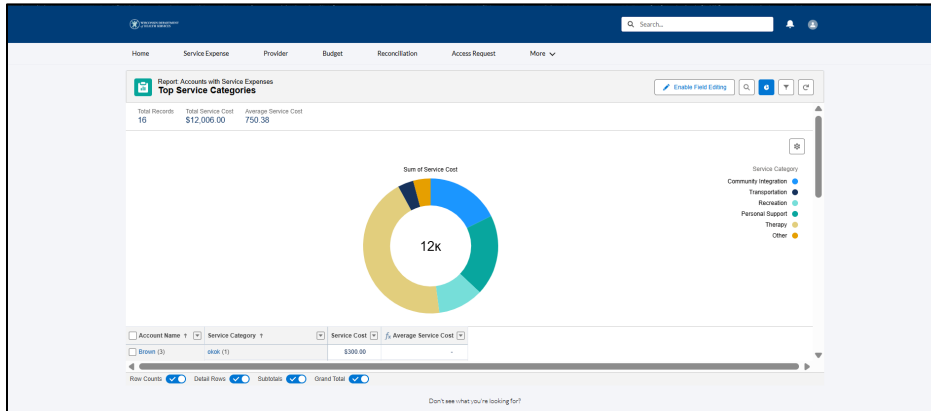
Contact Name	Account Name	Title	Email
Saikat Bheemreddy	Dane		sibheemreddy@deloitte.com
Y1 County User	Dane		yousaf.rahim@deloitte.com
coop-nexo	Dane		responccop1234@gmail.com
Peter Parker	Dane		marzahn@deloitte.com
Tony Stark	Grant		
Sunny Wane	Dane		grahf@deloitte.com
- Service Expenses (6+)**: A table with columns: Service Expense, Participant, Budget, and Service Category.
 

Service Expense	Participant	Budget	Service Category
SE-000001	Harris, Andre		Community Integration
SE-000000	Cara Moran	Dane - CY 2025	Transportation
SE-000004	Neymar Jr		Transportation
SE-000006	Harris, Andre	Grant - CY 2025	Transportation
SE-000005	Harris, Andre		Support and Service Coordina...
SE-000013	Harris, Andre		Recreation
- Reconciliation (6+)**: A table with columns: Reconciliation Name, Assessment expenses, Care Plan Expenses, and Total CCOP TCM revenue.
 

Reconciliation Name	Assessment expenses	Care Plan Expenses	Total CCOP TCM revenue
Dane Item 17			\$0.00
Dane Item 14			\$0.00
Dane Item 04			\$0.00
Dane Item 12			\$0.00
Dane Item 10			\$0.00
Dane Item 03			\$0.00

*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

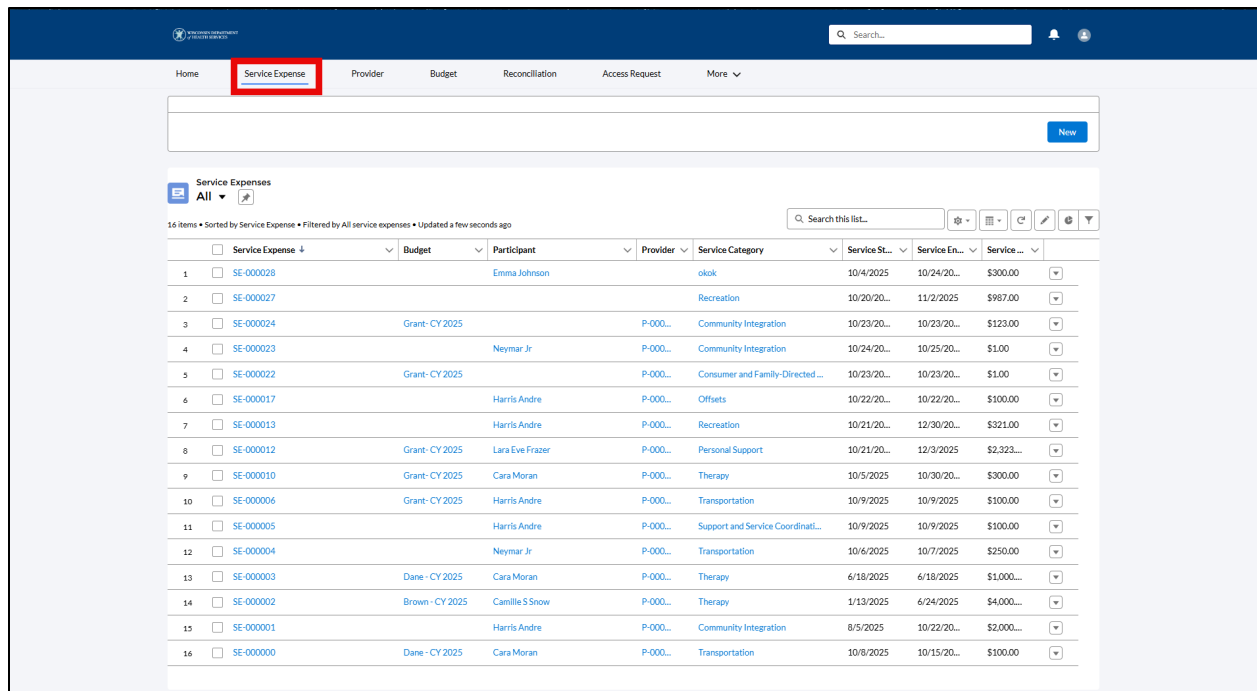
The Service Expenses page displays documentation of services provided to children and their associated costs. County users can create new service expense records and track their submission status.

#### 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.





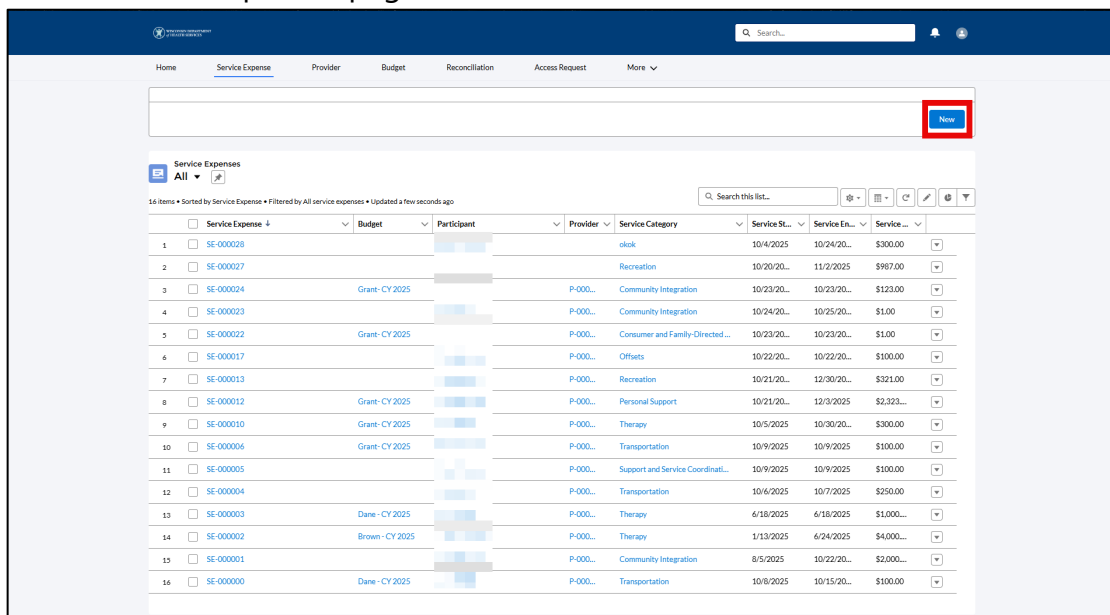
Service Expenses

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

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

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

The screenshot shows the 'Select Participant' form. It has three input fields: 'First Name', 'Last Name', and 'MCI ID'. Below these fields is a red box containing the 'Next' button. The form is part of a larger interface with a navigation bar at the top and a table of 'Service Expenses' below.

	Service Expense	Budget	Participant	Provider	Service Category	Service St...	Service En...	Service...
1	<input type="checkbox"/> SE-000053	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
6	<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**.

The screenshot shows the 'Select Participant' form with dropdown menus for 'First Name', 'Last Name', and 'MCI ID'. Below these fields is a red box containing the 'Choose Participant' button. The form is part of a larger interface with a navigation bar at the top and a table of 'Service Expenses' below.

	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-00006	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	elink	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

\* Account: Search Accounts...

\* Service Category: --None--

\* Service Description: Search Providers by Name or Number...

\* Service Start Date: [Calendar Icon]

\* Service End Date: [Calendar Icon]

\* Service Cost: [Text Field]

**Submit**

**Service Expenses**

All ▾

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

Search this list...

	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	Holly Harris	P-00005	Personal Support	11/13/20...	11/13/20...	\$200.00
3	<input type="checkbox"/> SE-000053	North Central ...	Holly Jay	P-00002	Personal Support	11/12/20...	11/12/20...	\$200.00
4	<input type="checkbox"/> 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: [Text Field]

Account: Brown

Provider: [Text 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.

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				click	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. If the individual is a new participant, continue to click **Next**.

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**.

Home Service Expense Provider Budget Reconciliation Access Request More

### Select Participant

No results found.

Choose Participant **Create New Participant**

Service Expenses

23 Items • Sorted by Service Expense • Filtered by All service expenses • Updated 2 minutes ago

Search this list...

	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	Holly Harris	P-00005	Personal Support	11/13/20...	11/13/20...	\$200.00
3	<input type="checkbox"/> SE-000053	North Central...	Holly Jay	P-00002	Personal Support	11/12/20...	11/12/20...	\$200.00
4	<input type="checkbox"/> SE-000052	Grant - CY 2025	Harris Andre	P-00005	Personal Support	11/12/20...	11/12/20...	\$200.00
5	<input type="checkbox"/> SE-000051	Grant - CY 2025	Neymar Jr	P-00000	Children's Foster Care	11/10/20...	11/10/20...	\$1.00
6	<input type="checkbox"/> SE-000050	Brown - CY 2025	Neymar Jr	P-00000	Recreation	11/10/20...	11/10/20...	\$1.00
7	<input type="checkbox"/> SE-000049	Brown - CY 2025	Neymar Jr	P-00000	Respite	11/10/20...	11/10/20...	\$1.00
8	<input type="checkbox"/> SE-000028		Emma Johnson		okok	10/4/2025	10/24/20...	\$300.00
9	<input type="checkbox"/> SE-000027				Recreation	10/20/20...	11/2/2025	\$987.00

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

Home Service Expense Provider Budget Reconciliation Access Request More

### Add New Participant

\* MCI ID

\* First Name

\* Last Name

\* SSN

\* Birthdate

\* Race

\* Level of Care

\* CLTS Status

\* Living Arrangement

\* Medicaid enrolled?

**Next**

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

Home Service Expense Provider Budget Reconciliation Access Request More

### Service Expense

Participant: **Billy West**

\* Account

\* Service Category

\* Service Start Date

\* Service End Date

\* Service Cost

**Submit**

Service Expenses

27 Items • Sorted by Participant • Filtered by All service expenses • Updated 2 minutes ago

Search this list...

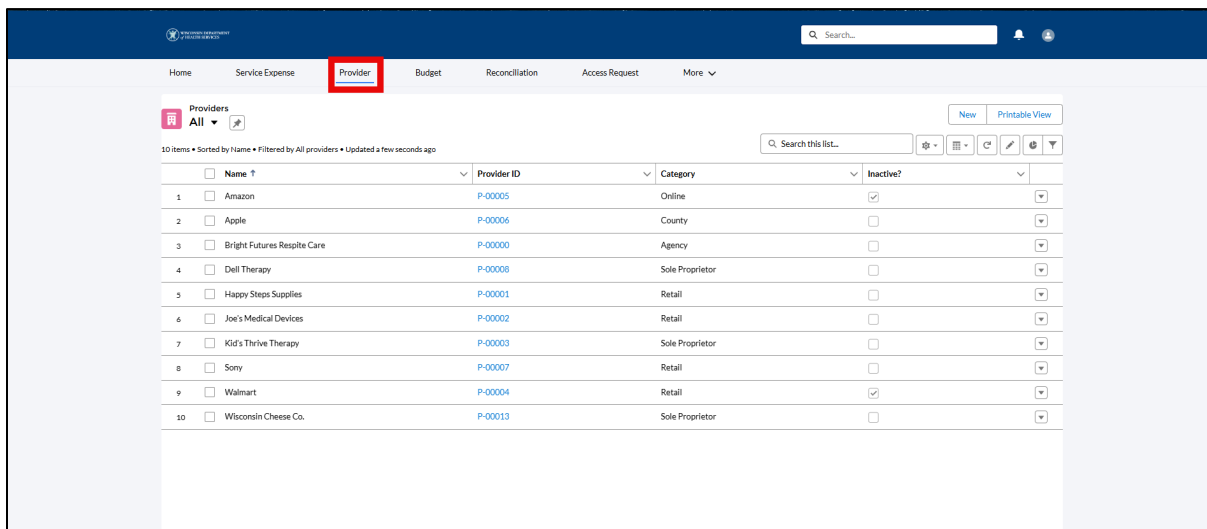
	Service Expense	Budget	Participant	Provider	Service Category	Service St...	Service En...	Service ...
1	<input type="checkbox"/> SE-000002	Brown - CY 2025	Camille S Snow	P-00003	Therapy	1/13/2025	6/24/2025	\$4,000.00
2	<input type="checkbox"/> SE-000000	Dane - CY 2025	Cara Moran	P-00002	Transportation	10/6/2025	10/15/20...	\$100.00
3	<input type="checkbox"/> SE-000003	Dane - CY 2025	Cara Moran	P-00002	Therapy	6/16/2025	6/16/2025	\$1,000.00
4	<input type="checkbox"/> SE-000010	Grant - CY 2025	Cara Moran	P-00000	Therapy	10/5/2025	10/30/20...	\$300.00

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.



The screenshot shows the 'Provider' page of a web application. The top navigation bar includes 'Home', 'Service Expense', 'Provider' (highlighted), 'Budget', 'Reconciliation', 'Access Request', and 'More'. Below the navigation bar, there is a search bar and a 'New' button. The main content area displays a table of providers. The table has columns for 'Name', 'Provider ID', 'Category', and 'Inactive?'. There are 10 items listed, sorted by Name. The providers are: Amazon, Apple, Bright Futures Respite Care, Dell Therapy, Happy Steps Supplies, Joe's Medical Devices, Kid's Thrive Therapy, Sony, Walmart, and Wisconsin Cheese Co.

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

Search this list...

	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"/>	▾

New Printable View

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  Complete this field.

\* Category

TIN

Physical Address (Street)

Physical Address (City)

Physical Address (State/Province)

Physical Address (ZIP/Postal Code)

Website

Email

Phone Number

Mailing Address (Street)

Mailing Address (City)

Mailing Address (State/Province)

Mailing Address (ZIP/Postal Code)

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	asfa		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 Y1	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 2025	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

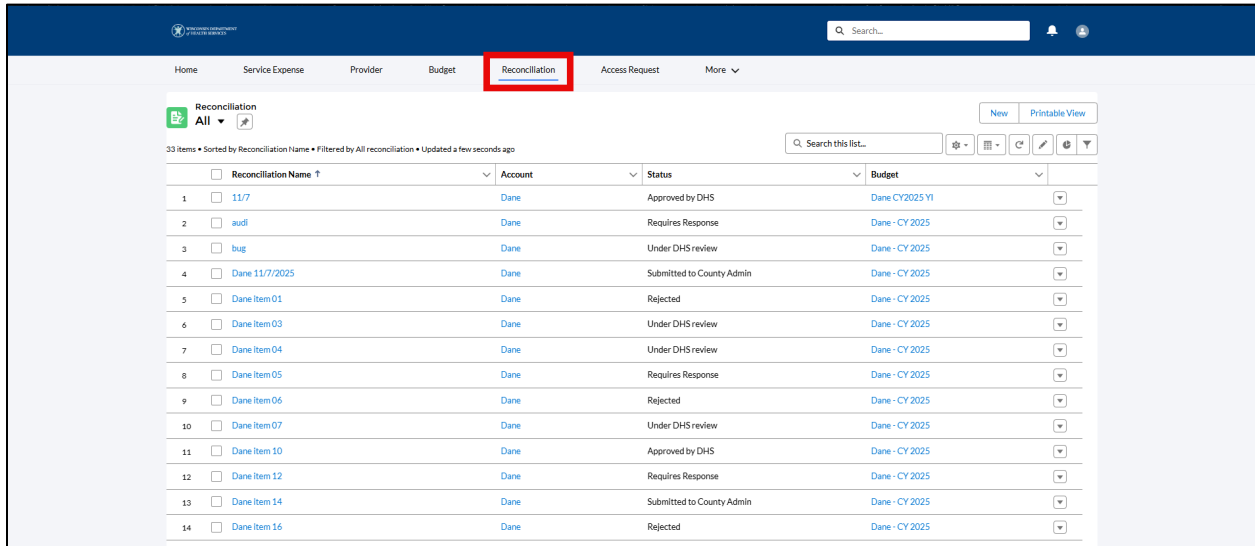
  

DETAILS	
<b>Budget</b>	Status: Active
Budget Name: Dane - CY 2025	Description: Dane county budget 2025
Account: CCOP	Created By: 10/9/2025 9:57 AM
Amount: \$110,000.00	Created Date: 10/9/2025 9:57 AM
Unfunded Amount: \$110,000.00	Last Modified By: 11/17/2025 9:34 AM
Period Start Date: 1/1/2025	Last Modified Date: 11/17/2025 9:34 AM
Period End Date: 12/31/2025	Budgets Actual: \$110,000.00
	Parent Budget:
<b>Sub A Allocation: Assessments and Plans</b>	Undesignated carryforward: \$0.00
Base Sub A Allocation: \$1,000.00	Total Sub A Allocation: \$1,000.00
Assessment and planning carryforward: \$0.00	
<b>Sub B Allocation: CCOP Services</b>	CCOP service carryforward: \$4,000.00
Base Sub B Allocation: \$88,500.00	CCOP other carryforward: \$0.00
Unfunded term funding: \$0.00	Total Sub B Allocation: \$92,500.00
<b>Totals</b>	Total Budget: \$94,700.00
Total Base Allocation: \$90,200.00	
Total carryforward: \$4,500.00	
<b>Risk and Administrative Limits</b>	Admin Reimbursement Maximum: \$4,196.50
Risk Reimbursement Maximum: \$13,300.00	Carryforward Maximum: \$4,500.00
Risk Reserve Deposit: \$10,000.00	



## 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.



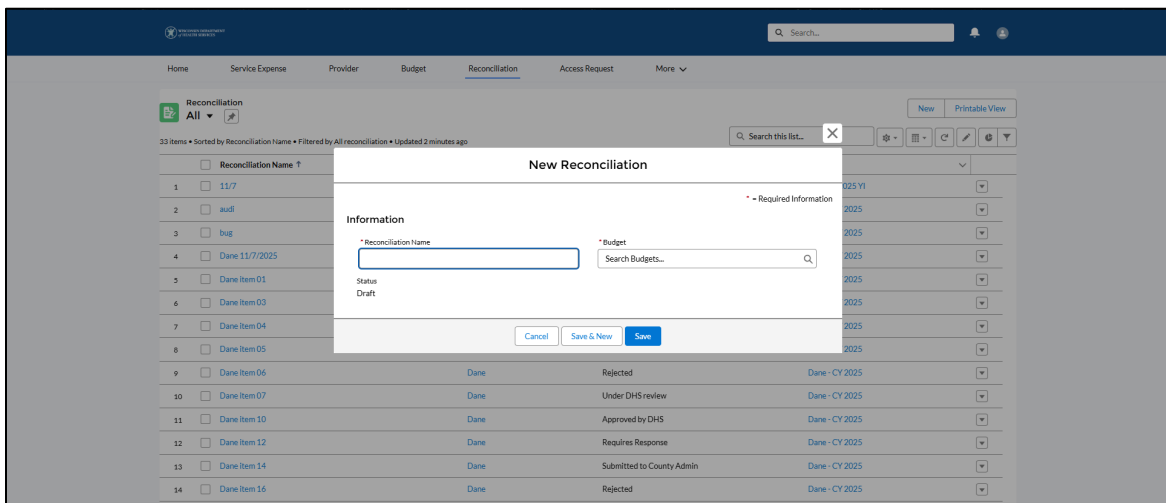
	Reconciliation Name	Account	Status	Budget
1	11/7	Dane	Approved by DHS	Dane - CY 2025 Y1
2	audi	Dane	Requires Response	Dane - CY 2025
3	bug	Dane	Under DHS review	Dane - CY 2025
4	Dane 11/7/2025	Dane	Submitted to County Admin	Dane - CY 2025
5	Dane Item 01	Dane	Rejected	Dane - CY 2025
6	Dane Item 03	Dane	Under DHS review	Dane - CY 2025
7	Dane Item 04	Dane	Under DHS review	Dane - CY 2025
8	Dane Item 05	Dane	Requires Response	Dane - CY 2025
9	Dane Item 06	Dane	Rejected	Dane - CY 2025
10	Dane Item 07	Dane	Under DHS review	Dane - CY 2025
11	Dane Item 10	Dane	Approved by DHS	Dane - CY 2025
12	Dane Item 12	Dane	Requires Response	Dane - CY 2025
13	Dane Item 14	Dane	Submitted to County Admin	Dane - CY 2025
14	Dane Item 16	Dane	Rejected	Dane - CY 2025

### 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



**New Reconciliation**

Information

\* Reconciliation Name

\* Budget

Status: Draft

Cancel Save & New Save

**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 displays the 'Reconciliation Form' tab within a web application. The interface includes a top navigation bar with links for Home, Service Expense, Provider, Budget, Reconciliation, Access Request, and More. A search bar is located in the top right corner. The main content area is divided into a left sidebar and a right main panel. The sidebar contains a 'Reconciliation Form' tab (highlighted with a red box) and a list of sections: CCOP Utilization, Risk Reserve (RR) Activity, Administrative Expenses, Summary, and Contact Information and Certification. The main panel shows the 'CCOP Utilization' section, which includes a 'Reconciled Year' dropdown menu. Below this, there are two sections: 'CCOP Assessments and Plans' and 'CCOP Services'. Each section has a text input field with a default value of '\$0.00' and an 'Accept Default Value' button. The 'CCOP Assessments and Plans' section also includes a 'Straight CCOP Service Expenses' field with a default value of '\$0.00'.

## Progress Tracking

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

The screenshot displays the 'Reconciliation Form' tab in a web application. The interface includes a top navigation bar with links to Home, Service Expense, Provider, Budget, Reconciliation, Access Request, and More. Below this, a sub-navigation bar shows 'Reconciliation Form', 'Details', and 'Review'. The main content area is divided into two panels. The left panel, titled 'Reconciliation Form', contains a list of sections: 'Reconciled Fields' (with a toggle switch and a progress bar), 'CCOP Utilization', 'Risk Reserve (RR) Activity', 'Administrative Expenses', 'Summary' (highlighted), and 'Contact Information and Certification'. The right panel, titled 'Risk Reserve (RR) Summary', displays a list of items with their corresponding values: '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), and 'Processed risk reserve deposits (withdrawals)'. A 'Comments & History' button is located in the top right corner of the right panel.

## 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.

This screenshot shows the 'Reconciliation Form' interface with the 'Summary' section expanded. The left panel lists the sections: 'Reconciled Fields', 'CCOP Utilization', 'Risk Reserve (RR) Activity', 'Administrative Expenses', 'Summary' (expanded), and 'Contact Information and Certification'. The right panel displays the 'Summary' section, which includes a list of items: 'Risk Reserve (RR) Summary', 'CCOP Administrative Expenses', and 'CCOP Summary'. Each item has a red square icon next to it, indicating it is expandable. The 'Reconciled Fields' section in the left panel also has a toggle switch and a progress bar.

Reconciliation Form Details Review

**Risk Reserve (RR) Summary**

CCOP risk reserve deposits funded by the reconciled year's CCOP allocation  
\$0.00

CCOP risk reserve withdrawals applied to reconciled year CCOP assessments and plans  
\$0.00

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  
\$0.00

Net CCOP risk reserve deposit (withdrawal)  
\$0.00

Starting CCOP risk reserve balance  
\$0.00

Risk reserve interest  
\$0.00

Processed risk reserve deposits (withdrawals)  
\$0.00

Comments & History

- **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.

CCOP Utilization

Risk Reserve (RR) Activity

Administrative Expenses

Summary

Contact Information and Certification

Reconciled Year  
2025

**CCOP Assessments and Plans**  
Entries must agree with total Assessment and Plans costs reported in HEART for the reconciled calendar year.  
\* Assessment and Plan Expenses  
\$0.00

**CCOP Services**  
Entries must agree with total Services costs reported in HEART for the reconciled calendar year.  
\* Straight CCOP Service Expenses  
\$0.00

**Children's Long-Term Support (CLTS) Program Match**  
The combination of CCOP and Basic County Allocation funds applied as non-federal match for CLTS services may not exceed the County's CLTS maintenance of effort (MOE) requirement.  
\* CCOP allocation applied as non-federal match for CLTS services  
\$0.00

**CCOP Target Case Management (TCM) Revenue**  
Report any TCM claims revenue received by the county during the reconciled year for TCM services provided to a CCOP participant where CCOP funds were used as the nonfederal match for TCM.  
\* Did the County receive Target Case Management (TCM) Revenue?  
No

Save as Draft

## 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: Summary, Contact Information and Certification, CCOP Utilization, Risk Reserve (RR) Activity, and Administrative Expenses. The 'Summary' section is selected. The main content area displays the 'Risk Reserve (RR) Summary' section, which is highlighted with a red border. This section contains a list of items with associated values:

Item	Value
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, which is highlighted with a red border. The section is divided into three main parts:

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

At the bottom right of the form, there is a blue 'Submit' button, which is also highlighted with a red border.

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.

The screenshot shows the 'Reconciliation Form' in the 'Review' tab. The 'Risk Reserve (RR) Summary' section is expanded, displaying various risk reserve items and their values. A red box highlights the 'Comments & History' button in the top right corner of the form.

Risk Reserve (RR) Summary	
CCOP risk reserve deposits funded by the reconciled year's CCOP allocation	\$0.00
CCOP risk reserve withdrawals applied to reconciled year CCOP assessments and plans	\$0.00
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	\$0.00
Net CCOP risk reserve deposit (withdrawal)	\$0.00
Starting CCOP risk reserve balance	
Risk reserve interest	
Processed risk reserve deposits (withdrawals)	

## 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.

The screenshot shows the 'Reconciliation Form' in the 'Details' tab. The 'Reconciliation Dane Item 01' record is displayed, showing the account name, reconciliation name, status, and other details. A red box highlights the 'Details' tab in the top navigation bar.

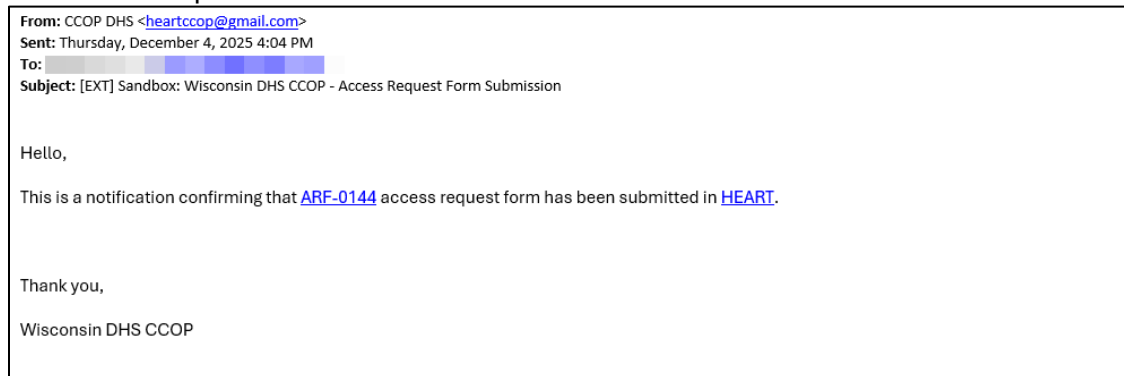
Reconciliation Dane Item 01	
Account	Dane
Reconciliation Name	Dane Item 01
Status	Rejected
Created By	.11/3/2025, 1:25 PM
Budget	Dane - CY 2025
Last Modified By	.11/4/2025, 12:23 PM

### 3.4.3 County Admin Review Process

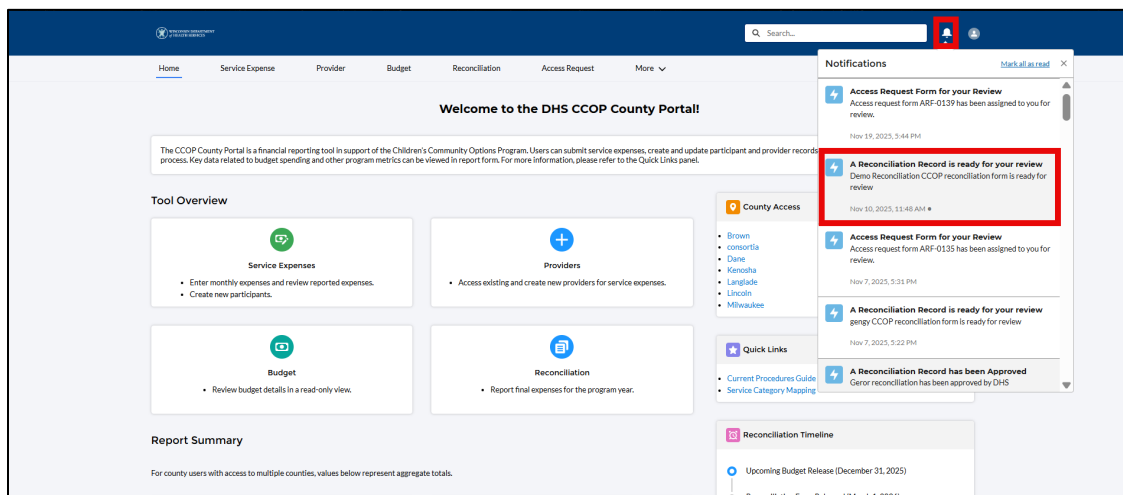
After a county user submits a reconciliation form, it enters review with the county admin.

#### 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 displays the 'Reconciliation Form' interface. The top navigation bar includes 'Home', 'Service Expense', 'Provider', 'Budget', 'Reconciliation', 'Access Request', and 'More'. The 'Reconciliation' tab is active, and the 'Review' sub-tab is highlighted with a red box. The main content area shows a 'Risk Reserve (RR) Summary' with various line items and their corresponding values. A 'Comments & History' button is visible in the top right corner of the form 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 'Reconciliation Form' interface with the 'Review' tab selected and highlighted with a red box. The 'Work Guide' section is visible, and the 'Review Decision' section contains two radio buttons: 'Approve' and 'Reject'. A 'Finish' button is located at the bottom right of the form area, 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:

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

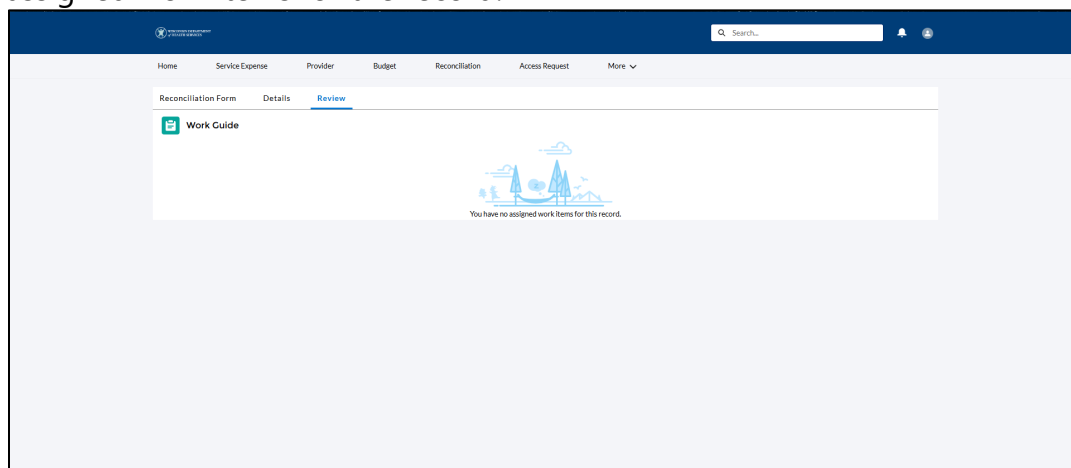
Hello,

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.

The screenshot shows the 'Reconciliation Form' interface with tabs for 'Details' and 'Review'. The 'Review' tab is active, displaying a 'Risk Reserve (RR) Summary' section. On the left, a sidebar lists various reconciliation items with checkboxes. The main area shows a list of items with their corresponding values. A red box highlights the comment icon (a speech bubble) next to the 'CCOP risk reserve withdrawals applied to reconciled year CCOP assessments and plans' field.

2. Select **Add Comment**.

The screenshot shows the 'Activity History' dialog box, which is a modal window displaying a list of activities. The dialog has a search bar and a 'Show History' checkbox. The activities are listed with their status, user, and timestamp. A red box highlights the 'Add Comment' button at the bottom right of the dialog.

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.

The screenshot shows a 'Post a Comment' modal window. At the top, it says 'Post a Comment' with a speech bubble icon. Below this is a text editor with a toolbar containing various formatting options like bold, italic, underline, and link. The text area contains the placeholder text 'Please review Risk Reserve Interest field for accuracy'. At the bottom of the modal, there are three buttons: 'Close', 'Cancel Comment', and 'Post Comment'. The 'Post Comment' button is highlighted with a red border. In the background, the 'Activity History' section is visible, showing a table with columns for 'Risk reserve Interest' and 'Processed risk reserve deposits (withdrawals)'.

## 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.

The screenshot shows the 'Access Request' page. At the top, there is a navigation bar with tabs for 'Home', 'Service Expense', 'Provider', 'Budget', 'Reconciliation', 'Access Request', and 'More'. The 'Access Request' tab is selected and highlighted with a red border. Below the navigation bar, there is a 'Request Access' button. The main content area is titled 'Access Request Forms' and shows a list of 14 forms. The table has columns for 'Access Request Form Name', 'Account', 'CCOP Role', 'Status', 'Created By', and 'Created Date'. The forms are listed in descending order of creation date.

	Access Request Form Name	Account	CCOP Role	Status	Created By	Created Date
1	ARF-0150	Grant	County User	Approved		12/8/2025, 9:47 AM
2	ARF-0149	Dane	County User	Rejected		12/5/2025, 2:20 PM
3	ARF-0147	Brown	County User	Rejected		12/5/2025, 1:11 PM
4	ARF-0146	Dane	County User	Rejected		12/5/2025, 11:45 AM
5	ARF-0139	Dane	County User	Approved		11/19/2025, 4:43 PM
6	ARF-0138	Lincoln	County Admin	Approved		11/10/2025, 1:48 PM
7	ARF-0136	Langlade	County Admin	Approved	Peter Parker	11/7/2025, 6:19 PM
8	ARF-0135	Dane	County User	Approved		11/7/2025, 4:31 PM
9	ARF-0134	Dane	County User	Approved		11/7/2025, 3:13 PM
10	ARF-0133	Dane	County User	Approved		11/7/2025, 1:28 PM
11	ARF-0132	Dane	County User	In Review		11/7/2025, 11:33 AM
12	ARF-0131	Dane	County User	In Review		11/7/2025, 11:29 AM
13	ARF-0129	Milwaukee	County User	In Review		11/7/2025, 11:26 AM
14	ARF-0128	Dane	County Admin	In Review		11/7/2025, 9:40 AM

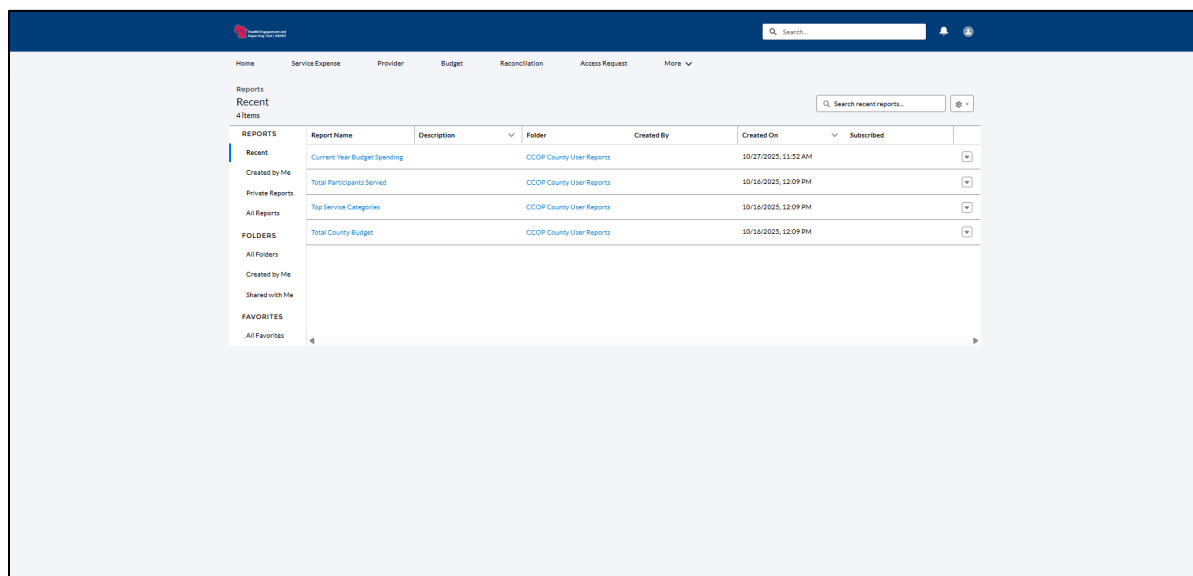
### 3.6 Reports Page

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:

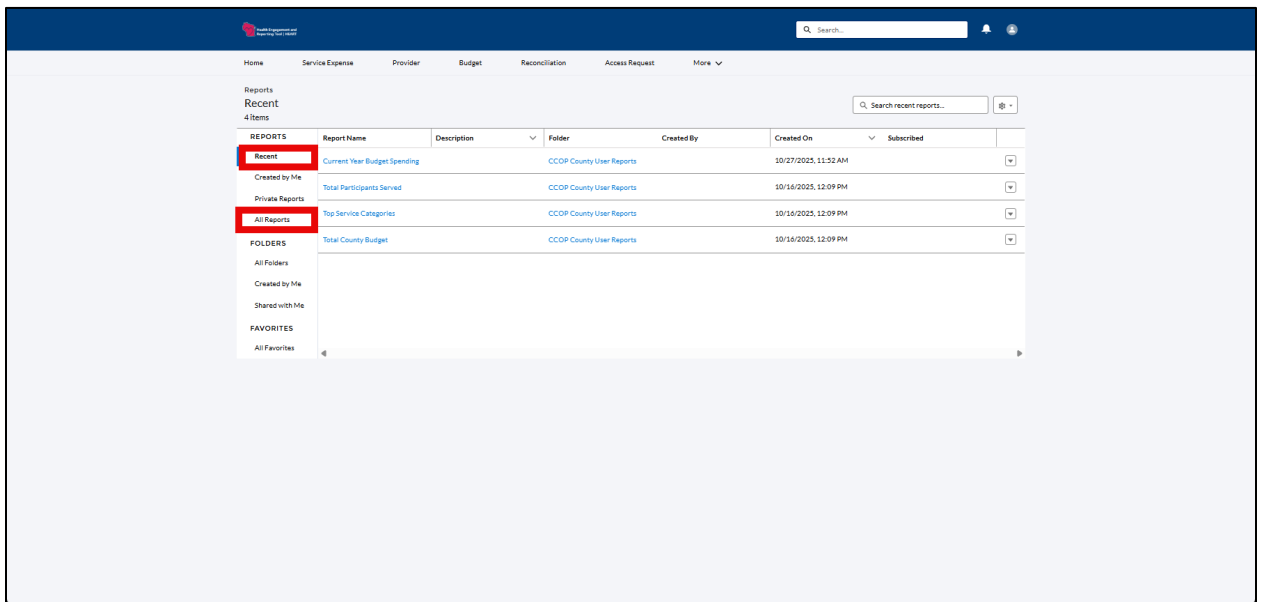
- **Left sidebar:** Recent, All Reports, Shared with Me, and Folders such as "CCOP County User Reports."
- **Main table columns:** Report Name, Description, Folder, Created By, Created On, Subscribed.



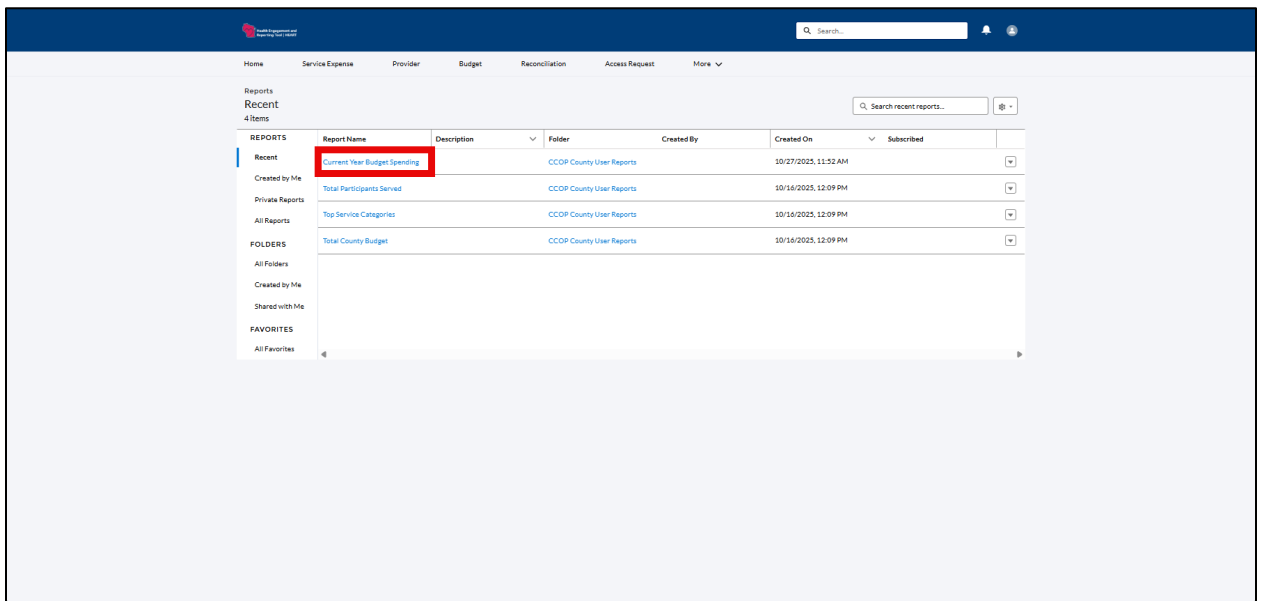
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Current Year Budget Spending		CCOP County User Reports		10/27/2025, 11:52 AM	
Created by Me	Total Participants Served		CCOP County User Reports		10/16/2025, 12:09 PM	
Private Reports	Top Service Categories		CCOP County User Reports		10/16/2025, 12:09 PM	
All Reports	Total County Budget		CCOP County User Reports		10/16/2025, 12:09 PM	
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

## To view a report

1. Go to Recent or All Reports.



2. Click the report name.



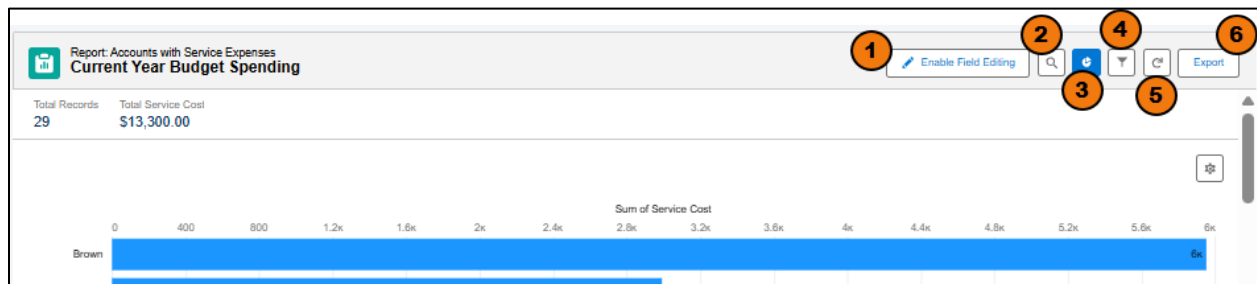
**Note:** Users do not have the ability to create reports or folders; they can only view them.

### 3.6.1 Managing Reports

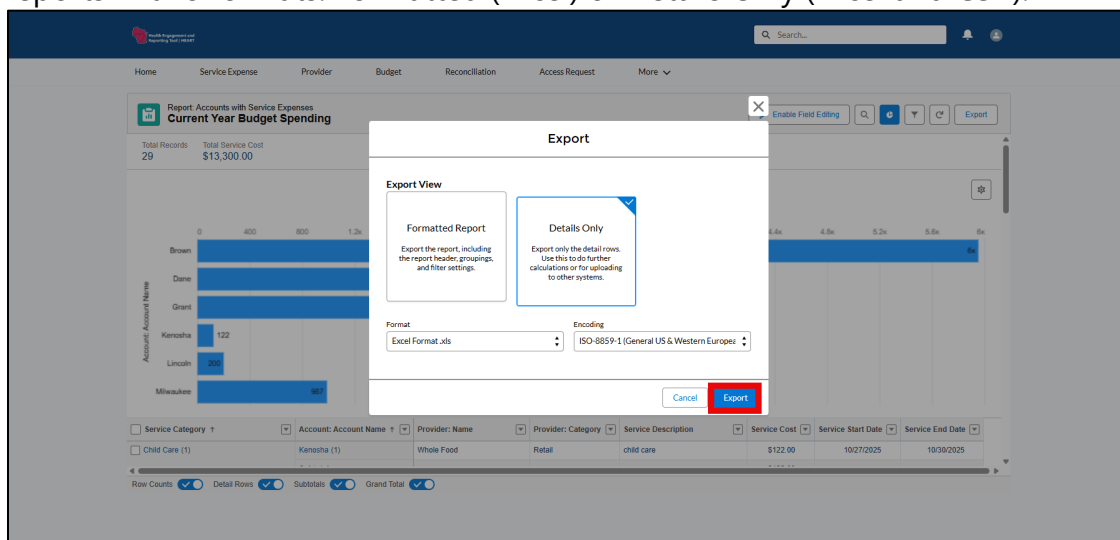
Each report includes:

- 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.

