

Instructions for County Waiver Agency (CWA) Fiscal Staff to access the Children's Long Term Support (CLTS) Data Warehouse External CWA Templates Folder via the ForwardHealth Partners Portal

DHS staff request that CWA fiscal staff use a new template designed by our staff to accurately and efficiently extract the 2015 CLTS Claims data for the CY 2015 CLTS reconciliation process.

The "CLTS 2015 Reconciliation Template" is available in Business Objects for counties to access through the WEB at <https://bo.prod.healthcare.wi.local/InfoViewApp/logon.jsp>

Instructions to acquire access to the Data Warehouse are available in the Partners Portal via ForwardHealth: <https://www.forwardhealth.wi.gov/>.

The CLTS 2015 Reconciliation template is a Business Objects query that will extract and format CWA 2015 CLTS Claims Extract information to align with Column B of the "Appendix B-Final Service Claims" worksheet in the CY 2015 CLTS Reconciliation Packet (F-00963). The template query prompts are prepopulated with the final CLTS CY 2015 reconciliation service (1/1/15-12/31/15) and check (1/1/15-3/11/16) dates. DHS staff strongly recommends that CWA fiscal staff access and run the "CLTS 2015 Reconciliation Template" prior to extracting the final data set to ensure they can retrieve claims data via the template. The final CY 2015 reconciliation data set will be available in the CLTS Fiscal Claims Universe on or after March 17, 2016, and counties will need to refresh the template query at that time to ensure it will contain the final CY 2015 reconciliation data set summary totals. Additional reports can be added to the template to view and format data fields as necessary.

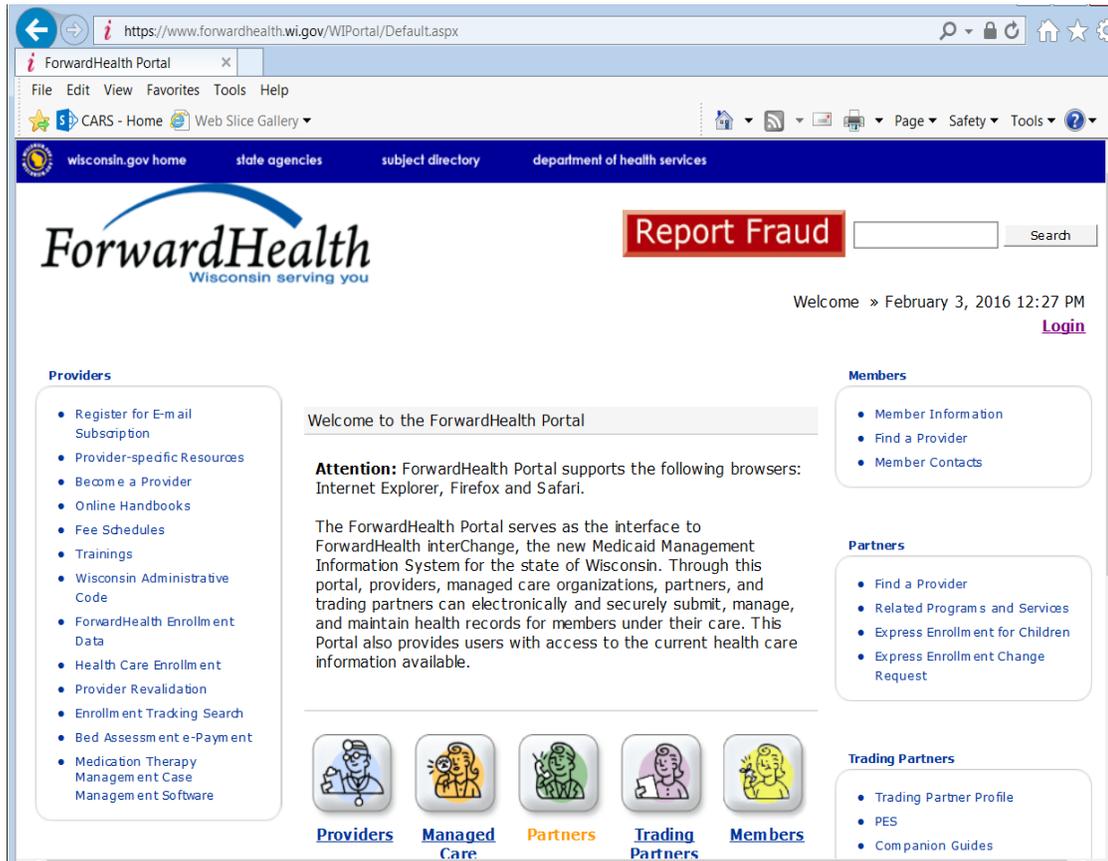
A) Detailed Instructions with illustrations to access the CLTS DW External CWA Templates folder.

Counties will need to have Business Objects WEB access to the CLTS Fiscal Claims Universe to run the template, which is saved in the CLTS DW External CWA Templates folder. CLTS fiscal staff are requested to contact their local security administrators for instructions on business objects clearance and on accessing the CLTS Claims Extract Universe, if necessary. The local security administrators will be contacted by HP to validate new authorizations prior to granting access.

To acquire access to the CLTS DW External CWA Templates Folder

- 1) Go to the ForwardHealth Portal:
<https://www.forwardhealth.wi.gov/WIPortal/Default.aspx>

2) Click on the [Partners](#) Tile.



3) Click on the [Partner Portal User Guide](#) under the Quick Links in the Right Side Column.

The screenshot shows a web browser window with the URL <https://www.forwardhealth.wi.gov/WIPortal/Home/Partner%20Login/tabid/39/Default.aspx>. The page header includes navigation links for [wisconsin.gov home](#), [state agencies](#), [subject directory](#), and [department of health services](#). The main header features the **ForwardHealth** logo with the tagline "Wisconsin serving you" and the **interChange Partner** logo. A welcome message reads "Welcome » February 3, 2016 12:30 PM" with a [Login](#) link.

The main content area contains the following text:

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

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

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

Accessing the Secure Partner Site

Many partner users were emailed their login information during October 2008. If you received your

On the right side of the page, there is a search bar and a **Login to Secure Site** section with the following fields:

- Username**:
- Password**:
- Go!** button
- [Forgot your password?](#)

Below the login section is a **Quick Links** section with the following links:

- [Online Handbooks](#)
- [ForwardHealth Updates](#)
- [Max Fee Schedules](#)
- [Partner Request Access](#)
- [Partner Portal User Guide](#)
- [Wisconsin Well Woman Program Policy and Procedure](#)

- 4) Open the [Partner Portal User Guide](#) and Go to the Table of Contents.

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Click on 4.3 Requesting DSS Universe Access to find the instructions to access the CLTS DW External CWA Templates folder, which is identified as a DSS Universe in the DSS Universe Drop Down List.

The following screen prints are the instructions from the Partner Portal User Guide to Request DSS Universe Access.

4.3 Requesting DSS Universe Access

If your organization has associated DSS universe access there will be a link for Partner DSS Universe Management in the Quick Links menu.

1. Click Partner DSS Universe Management.



Figure 33 Partner DSS Universe Management Link

The Portal Access Request Information page will be displayed.

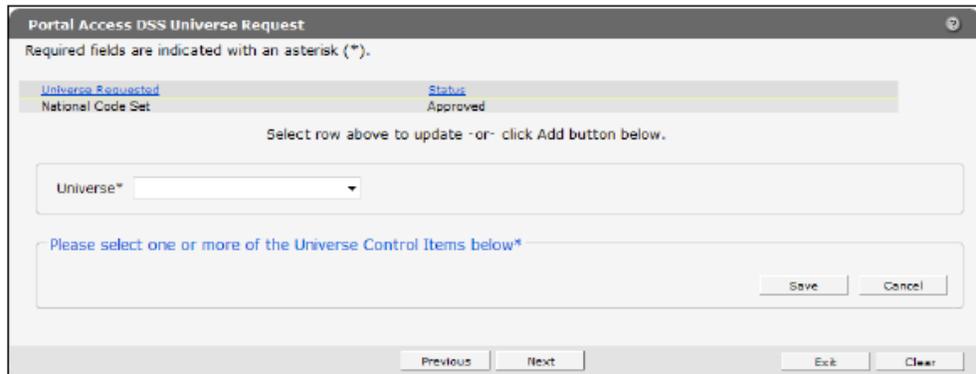


Figure 34 Portal Access DSS Universe Request Page

Logged-in users can use this page to request access to DSS universes. The top of the panel lists any universes already requested or approved, along with the status of the request. The drop-down menu in the Universe field will display the universes applicable to the user's role and organization.

2. Select a universe using the drop-down menu in the **Universe** field.
3. Click anywhere on the panel. The page will refresh and one or more checkboxes will allow you to select the universe control items you wish to request.

The screenshot shows the 'Portal Access DSS Universe Request' window. At the top, it says 'Required fields are indicated with an asterisk (*).' Below this is a table with two columns: 'Universe Requested' and 'Status'. The first row shows 'Encounter Datamart' under 'Universe Requested' and 'Approved' under 'Status'. Below the table, it says 'Select row above to update - or- click Add button below.' There is a dropdown menu for 'Universe*' with 'Encounter Datamart' selected. Below that, it says 'Please select one or more of the Universe Control Items below*'. There are ten checkboxes, each followed by a label and a number. The labels are: 'WPS Insurance Corporation: 23119999', 'Adams Co. HLTH and Human SVCS Dept: 23110011', 'Ashland Co. HLTH and Human SVCS: 23110021', 'Manitowoc Co. Human SVCS Dept: 23110361', 'Marathon Co. Dept of Social SVCS: 23110371', 'North Central HLTH Care - Marathon Co.: 23113371', 'Marinette Co. HLTH and Human SVCS Dept: 23110381', 'Marquette Co. Dept of Human SVCS: 23110391', 'Wood Co. Dept of Social SVCS: 23110711', and 'Wood Co. Unified SVCS: 23110712'. At the bottom right of the checkbox area are 'Add' and 'Cancel' buttons. At the bottom right of the window is an 'Exit' button.

Figure 35 Portal Access DSS Universe Request Page — Universe Control Items

4. Place a check in the checkboxes for the items you wish to access.
5. Click **Add**. The page will refresh and the selected universe will be added to the list.

The screenshot shows the 'Portal Access DSS Universe Request' window. At the top, it says 'Required fields are indicated with an asterisk (*).' Below this is a table with two columns: 'Universe Requested' and 'Status'. The first row shows 'Encounter Datamart' under 'Universe Requested' and 'Requested' under 'Status'. Below the table, it says 'Select row above to update - or- click Add button below.' There is a dropdown menu for 'Universe*' with 'Encounter Datamart' selected. Below that, it says 'Please select one or more of the Universe Control Items below*'. There are ten checkboxes, each followed by a label and a number. The labels are: 'WPS Insurance Corporation: 23119999', 'Adams Co. HLTH and Human SVCS Dept: 23110011', 'Ashland Co. HLTH and Human SVCS: 23110021', 'Manitowoc Co. Human SVCS Dept: 23110361', 'Marathon Co. Dept of Social SVCS: 23110371', 'North Central HLTH Care - Marathon Co.: 23113371', 'Marinette Co. HLTH and Human SVCS Dept: 23110381', 'Marquette Co. Dept of Human SVCS: 23110391', 'Wood Co. Dept of Social SVCS: 23110711', and 'Wood Co. Unified SVCS: 23110712'. At the bottom right of the checkbox area are 'Add' and 'Cancel' buttons. At the bottom right of the window is an 'Exit' button.

Figure 36 Portal Access DSS Universe Request Page — Universe Added to List

Repeat steps 2-6 for each universe you wish to request.

You will be notified by email when a decision is issued on your request.

6. Click **Exit** to return to the secure Partner home page.

4.4 Partner Request Search [Admin]

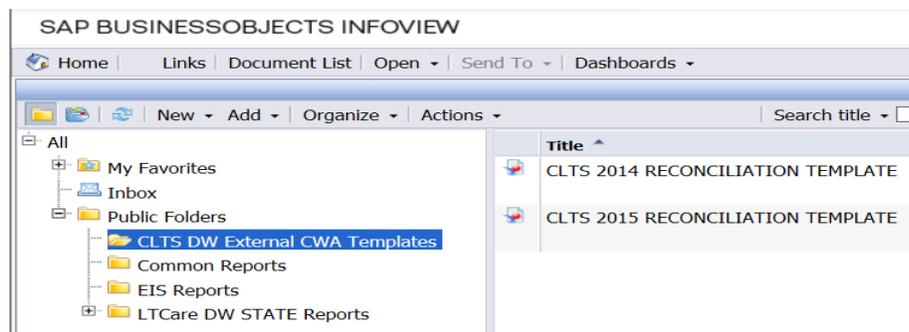
5) **Help References:** If you are unable to complete the above, follow these instructions:

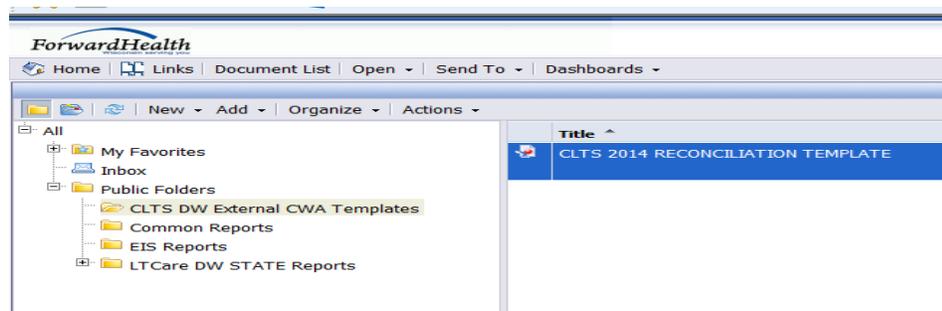
- Contact your local security administrator to receive Secure Portal Administrative Access.
- Email Business Objects questions to HP Help Desk at VEDSDSSHelp@wisconsin.gov or
- Contact the SOS Desk by phone at 608-266-9198 for information.

B) Detailed Instructions to use the CLTS 2015 Reconciliation Template follow:

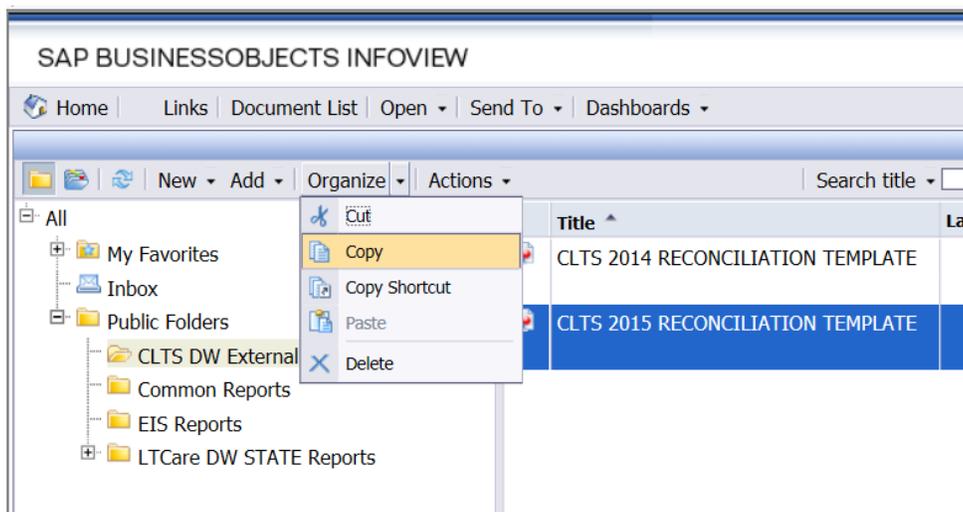
To access the CLTS 2015 Reconciliation template and retrieve the agency's CLTS Fiscal Claims Data, the county CLTS fiscal staff must copy the template to their agency's folder.

The CLTS 2015 Reconciliation Template is located in the CLTS DW External CWA Templates folder:

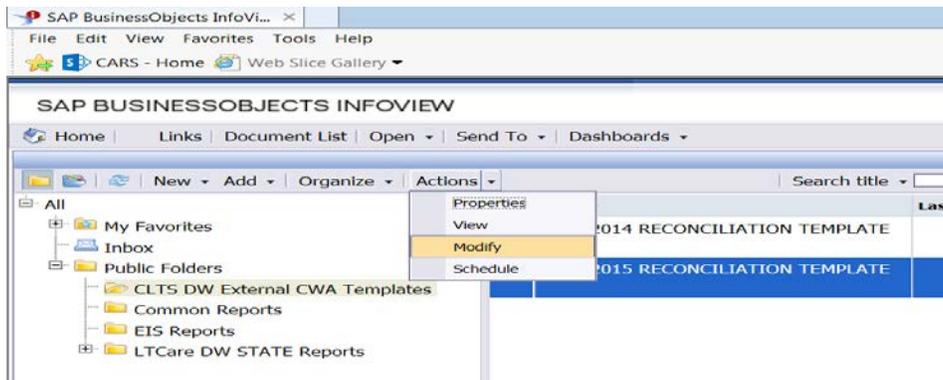




- 1) Go to the CLTS DW External CWA Templates folder.
- 2) Select the CLTS 2015 RECONCILIATION TEMPLATE.
- 3) Go to the Organize button on the second Bar and Select 'Copy' from the 'Organize' dropdown menu.

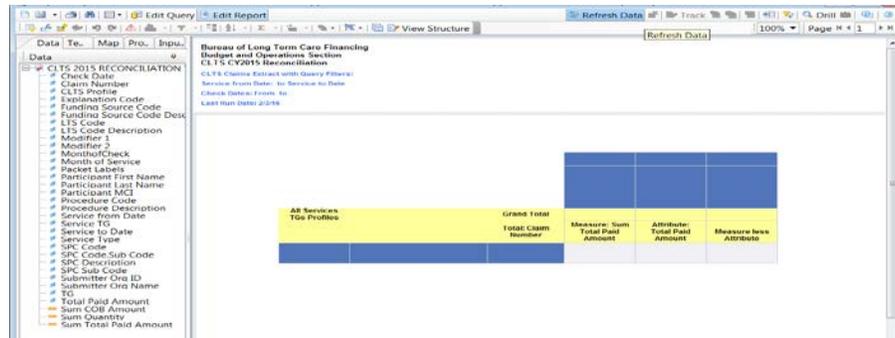


- 4) Go to your **Agency's report folder**, and select 'Paste' from the 'Organize' dropdown menu.
- 5) Select the report from your **Agency's folder**, and select Modify from the 'Actions' dropdown menu.

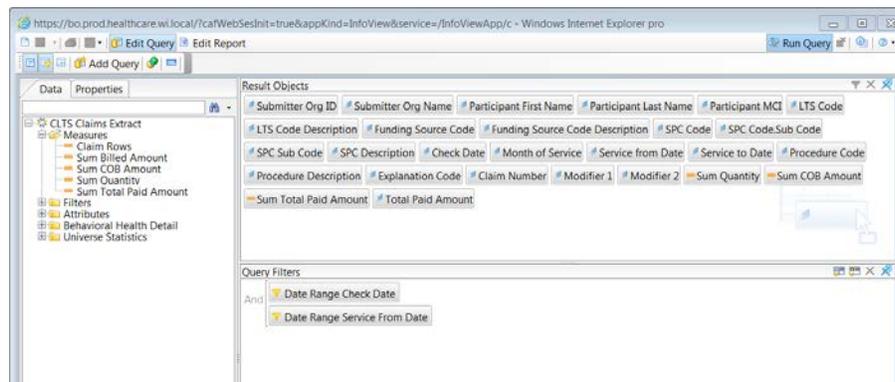


The report opens in the Edit Report Screen.

- 6) There are two options to population the template with the Claims.
 - From the Edit Report Screen use the Refresh Data button to populate the template with the county’s paid claims data.



- From the Edit Query Screen click on the Run Query button.



Clicking on the Run Query will open the Prompts box.

The Prompts box values in the template are prefilled with the CY 2015 reconciliation From and To Check Dates and From and To Service Dates.

Click on the Run Query under the Prompts box to populate the template with the county's paid claims data.

