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1 Introduction

Both public and secure information is accessible through the ForwardHealth Provider Portal. Public information is accessible to all users; however, to gain access to secure information and to conduct business with ForwardHealth, providers are required to establish a secure account within the Portal.

The Portal allows providers to conduct business through a secure entry point 24 hours a day, seven days a week. After creating a secure Provider Portal account, providers can perform various functions including verifying member enrollment; submitting electronic claims, adjustments, and prior authorization requests; and viewing other reports and data.
2 Request Portal Access

To establish a Provider Portal account, providers will need a PIN. Providers can establish as many provider Portal accounts as needed for their business.

1. To request a PIN, access the ForwardHealth Portal at https://www.forwardhealth.wi.gov/.

![ForwardHealth Portal Page](image)
2. Click **Providers**. The public page for the Provider area of the ForwardHealth Portal will be displayed.

![Public Provider Page](image)

**Figure 2** Public Provider Page
3. In the Quick Links box on the right of the page, click **Request Portal Access**. The Request Portal Access page will be displayed.

![Request Portal Access Page](image)

**Figure 3** Request Portal Access Page

4. In the “NPI Information” section, enter the provider’s National Provider Identifier (NPI) in the NPI Number field if you are a health care provider.

   If you are not a health care provider (for example, a personal care only provider, a specialized medical vehicle provider, or a blood bank), proceed to **Step 9**.
5. Click **Search**.

The “ForwardHealth Certifications for Requested NPI” section will auto-populate with the provider’s information that ForwardHealth has on file.

If the NPI is not found, the page will refresh; however, the “ForwardHealth Certification for Requested NPI” section will not be populated with the provider’s information.

![Request Portal Access Page](image)

**Figure 4** Request Portal Access Page
6. Click the appropriate row from the “ForwardHealth Certifications for Requested NPI” section. The “Selected NPI” section will auto-populate with the selected information.

![Figure 5 Selected NPI Section with Auto-populated Information](image)

7. Enter the provider’s Social Security number (SSN) or Tax ID Number (TIN) in the SSN or TIN field in the “Selected NPI” section.

8. Skip to Step 12.

9. If the provider is not a health care provider and therefore does not have an NPI, enter the provider’s Medicaid Provider ID in the “Provider Number Information” section.

10. From the Financial Payer drop-down menu, select the financial payer certification for which the provider is requesting a Provider Portal account.

11. Enter the provider’s SSN or TIN in the SSN or TIN field.

![Figure 6 Provider Number Information Section](image)
12. Click **Submit**. If the request is successful, a confirmation page will be displayed.

![Confirmation Page](image)

**Figure 7** Confirmation Page

If the request is not successful, an error message indicating why the information could not be submitted will be displayed at the top of the page.

![Example Error Message](image)

**Figure 8** Example Error Message

A request could be denied for some of the following reasons:

- No provider agreement on file. Call Provider Services at 800-947-9627 for the agreement.
- The SSN or TIN number is incorrect. Verify the number and enter the correct number.
- A PIN was already requested. Check within your organization to find out if someone has already received the PIN and set up an account(s).

If you have questions, call the Portal Help Desk (toll free) at 866-908-1363 Monday through Friday between 8:30 a.m. and 4:30 p.m.
After a provider has successfully requested Portal access, a letter containing a PIN will be mailed to the provider. Access to the Portal is **not** possible without a PIN. The letter also includes a Login ID, which is a health care provider’s NPI or a non-health care provider’s Medicaid Provider ID. For security purposes, the Login ID contains only digits 3, 4, 5, and 6 of the NPI or Provider ID.

![PIN Letter](image-url)

**Month X, 20XX**

Im A. Provider  
XYZ Clinic  
123 Main St  
Anytown WI 55555-1111

Dear Provider:

ForwardHealth has received your request to establish a secure Portal account. A summary of the information you provided is included below, along with a Login ID and Personal Identification Number (PIN) you will need in order to set up your secure provider account on the ForwardHealth Portal.

- **NPI or Provider ID:** xx34560000X  
- **Provider Type/Specialty:** Physician/Internal Medicine  
- **Taxonomy:** XXXXXXXXXX  
- **Zip Code:** 55555-1111  
- **Financial Payer:** Medicaid

Please note that for security purposes, only digits 3, 4, 5, and 6 of your NPI or Provider ID are shown.

To create your secure Provider account:
- Go to the ForwardHealth Portal at [www.forwardhealth.wi.gov](http://www.forwardhealth.wi.gov/).
- Select the “Providers” button.
- Select the Logging in for the first time? link under “Login to Secure Site”.
- Enter your Login ID and PIN:  
  - Login ID: XXXXXXXXXX  
  - PIN: XXXXXXXXXX

Detailed instructions and helpful hints on setting up your secure provider account can be found at [www.forwardhealth.wi.gov](http://www.forwardhealth.wi.gov/).

Sincerely,

<Department Name>

F-13512 (10/08)

[www.dhs.wisconsin.gov](http://www.dhs.wisconsin.gov)
3 Set Up an Account

After receiving a PIN letter, users may set up an account on the ForwardHealth Portal. Users will use the Login ID and PIN from the PIN letter to create a user name and password as well as to enter contact and security information.

For information about adding a new organization to a current account, refer to Section 7 Add Organization.

3.1 Account Types

Three different account types are available through the Portal. Access to certain features or functions on the Portal is determined by the account type assigned to the user. Through these different account types, a high level of security and accountability is maintained.

- **Administrative accounts**—The user who establishes the Portal account with the Login ID and PIN (from the PIN letter) is considered the account administrator and is responsible for managing the Portal account. Administrative accounts are granted complete access to all functions and applications within the Provider area of the Portal and have the ability to add, remove, and manage other account types and their access.

  Each service location (certification/provider file) can only have one user designated as an account administrator; however, multiple service locations can be attached to the same account administrator.

- **Clerk accounts**—Administrative accounts can set up clerk accounts with access to any or all of the roles available to the administrative account. If a new role becomes available, that role may be assigned to a clerk account. A clerk account can be added to multiple organizations to allow one clerk access to multiple organizations.

- **Clerk administrative accounts**—Clerk accounts may be granted clerk administrative rights. A clerk administrative account can create new clerk accounts with access to any or all of the roles to which the clerk administrative account has access and can delete and manage clerk accounts under their purview.
3.2 Logging in for First Time

1. After the user receives the PIN letter, access the ForwardHealth Portal at https://www.forwardhealth.wi.gov/.

2. Click Login. The ForwardHealth Portal Login box will be displayed.
3. **Click ****Logging in for the first time?** The Account Setup page will be displayed.

![Account Setup Page](image)

**Figure 12** Account Setup Page

4. Enter the Login ID and PIN listed in your PIN letter.

   For security purposes, the PIN letter will contain only four digits of the NPI or Medicaid Provider ID reported; however, users should **enter the entire** NPI or Medicaid Provider ID in the Login ID field.

   The PIN from the PIN letter can only be used once. After the account has been established, the PIN cannot be used again.
5. Click **Setup Account**. The Account Setup user profile page will be displayed.

![Account Setup User Profile Page](image)

**Figure 13** Account Setup User Profile Page

6. Enter information in the fields. It is necessary to **complete all the fields** on this page.

- The user name must be between six-20 characters and can only contain letters and numbers. The user name is not case-sensitive.
  
  Note: The user name cannot be changed without deactivating the account.

- The password must be between eight–15 characters and must contain three different types of characters such as uppercase letters, lowercase letters, special characters, or numbers. The password must be unique and cannot contain information from the user name, contact first name, contact last name, or the security answers.

- The phone number must include the area code. The number will be auto-formatted.
• The security answers must have at least two characters and cannot contain special characters (except for spaces). The security answers allow the user to validate their identity and reset their password if necessary. Security answers are case-sensitive.

7. Read the Security and Confidentiality agreement.

8. Check the agreement checkbox.

9. Click Submit. If the user receives an error message, correct the error(s) and click Submit again.

The License for Use of Physicians’ Current Procedural Terminology, Fourth Edition (CPT) and Point and Click License for Use of Current Dental Terminology (CDT) agreements page will be displayed.

10. Click the radio button next to “I Accept.” Click Submit Agreement.

Note: If “I Do Not Accept” is selected, the user will be returned to the ForwardHealth Portal home page and will not be able to access the secure Provider Portal.
11. The user’s secure Provider page will be displayed.

![Figure 15 Secure Provider Page](image)

### 3.3 Reset Password

2. Click **Login**. The ForwardHealth Portal Login box will be displayed.

![ForwardHealth Portal Login](image)

**Figure 16** ForwardHealth Portal Login

3. Click **Forgot your password?** The Reset Password page will be displayed.

![Reset Password](image)

**Figure 17** Reset Password Page

4. Enter the account user name.
5. Click **Next**. The Reset Password page with two of the four security questions selected when the account was set up will be displayed.

![Figure 18 Reset Password Page with Security Questions](image)

6. Enter the answers to the security questions. The answers are case-sensitive.
7. Click **Next**. The Reset Password page with new password fields will be displayed.

![Reset Password Page](image)

**Figure 19** Reset Password Page with New Password Fields

8. Enter a new password (twice for confirmation).

9. Click **Submit**. The user’s secure Provider page will be displayed.
4 Maintenance

Users may change account information such as contact name, phone number, or email address through the Maintenance link on the Account Home page.

4.1 Change Account Information

2. Click Login. The ForwardHealth Portal Login box will be displayed.
3. Enter the username.
4. Enter the password. The user’s password is case sensitive. Make certain to enter it exactly.
5. Click Go! The secure Provider page will be displayed.

![Secure Provider Page](image-url)

**Figure 20** Secure Provider Page
6. Click **Account** on the main menu at the top of the page. The Account Home page will be displayed.

![Account Home](image)

**What would you like to do?**

- **Maintenance**
- **Messages**
- **Change Password**
- **Clerk Maintenance**
- **Switch Organization**
- **Add Organization**
- **View the Account User Guide**

**Figure 21** Account Home Page

Various account management functions can be performed using the links on the Account Home page.
7. Click **Maintenance**. The Account Maintenance page will be displayed.

![Account Maintenance Page](image)

**Figure 22** Account Maintenance Page

If not already completed, the user will need to answer four security questions prior to submitting their changes. If the user forgets or loses their password, the security questions will be used to validate their identity and allow them to reset their password. The user should ensure to select questions to which they will readily know the answers but that are not common knowledge.

The security answers must have at least two characters and cannot contain special characters (except for spaces). Security answers are case-sensitive.

8. Make applicable changes.

9. Click **Submit**. A confirmation message will be displayed.

![Confirmation Message](image)

**Figure 23** Confirmation Message

If the user receives an error message, they should correct the error(s) and click **Submit** again.
5 Change Password

Users will be prompted to change their Portal account passwords every 60 days; however, through the Change Password function, users can change their password at any time.

Note: The Change Password link on the Account Home page serves the same purpose as the Change Password button on the Account Maintenance page.

1. On the Account Home page, click Change Password. The Change Password page will be displayed.

![Change Password Page](image)

Figure 24 Change Password Page

2. Enter the user’s current password.

3. Enter the user’s new password (twice for confirmation). The password must be between eight–15 characters and must contain three different types of characters such as uppercase letters, lowercase letters, special characters, or numbers. The password must be unique and cannot contain information from the user name, contact first name, contact last name, or the security answers.

   Note: The new password cannot match any of the last eight passwords.

4. Click Submit. A confirmation message will be displayed.

   ![The following messages were generated](image)

Figure 25 Confirmation Message

If the user receives an error message, they should correct the error(s) and click Submit again.
6 Clerk Maintenance

If more than one person will be working on the account, clerk accounts must be established and roles assigned for the various functions the clerks will be performing.

On the Account page, click Clerk Maintenance. The Clerk Maintenance Search panel will be displayed.

Through the Clerk Maintenance panels, users with administrative and clerk administrative accounts can search for, add, or remove clerks; assign clerk roles; and reset a clerk’s password.

Note: Users with clerk administrative accounts may not administer their own accounts or other administrative or clerk administrative accounts.

6.1 Add a Clerk

The Add Clerk function allows the user to add new clerks to a provider organization and to assign specific roles.
1. Click **Add Clerk** located at the bottom of the Clerk Maintenance Search panel. The Clerk Account panel will be displayed.

![Clerk Account Panel](image)

**Figure 27** Clerk Account Panel

Complete the following steps to add a new clerk account:

- Enter a user name. The user name must be between six–20 characters and can only contain letters and numbers. The user name is not case-sensitive.
- Enter the new clerk’s contact first name and contact last name.
- Enter the new clerk’s phone number (and extension, if applicable).
- Enter the new clerk’s email (twice for confirmation).
- Enter an initial password for the new clerk (twice for confirmation).

The password must be between eight–15 characters and must contain three different types of characters such as uppercase letters, lowercase letters, special characters, or numbers. The password must be unique and cannot contain information from the user name, contact first name, contact last name, or the security answers.
Note: Clerks must change the password set up by the administrative account the first time they log in.

If adding a clerk account that has already been created but needs to be added to a new organization, complete the following steps:

- Click **Search** to the right of the User Name field. The User Name Search box will be displayed.

![User Name Search Box](image)

**Figure 28** User Name Search Box

- Enter the clerk account’s username, first name, or last name.

- Click **Search**. The clerk’s information will be displayed in the “Clerk Details” section.

![Search Results Section](image)

**Figure 29** Search Results Section

- Click the row of the applicable clerk account. The User Name Search box will close and the clerk account information will be auto-populated in the “Clerk Details” section of the Clerk Account panel.

![Clerk Account Information Autopopulated on Clerk Account Panel](image)

**Figure 30** Clerk Account Information Auto-Populated on Clerk Account Panel

2. Proceed to the one of the following sections once clerk details have been entered or populated:

- Step 2 of [6.3 Add a Role to a Clerk](#)
- Step 1 of **6.5 Assign a Clerk Administrator**

### 6.2 Search for a Clerk

The Clerk Maintenance Search panel allows a user to select an existing clerk within the provider organization.

1. Enter information for the clerk in any combination in the Search Criteria section. Alternatively, leave the fields blank to bring up a list of all clerks associated with the provider organization.

![Figure 31 Search Criteria Section](image)

2. Click **Search**.

3. Click the row containing the clerk’s name in the “Search Results” section.

![Figure 32 Search Results Section](image)
The clerk’s information will populate in the “Selected Clerk” section.

![Search Results and Selected Clerk Sections](image)

**Figure 33** Search Results and Selected Clerk Sections

4. Proceed to the one of the following sections once a clerk has been selected:

   - 6.3 Add a Role to a Clerk
   - 6.4 Remove a Role from a Clerk
   - 6.5 Assign a Clerk Administrator
   - 6.6 Reset a Clerk’s Password
   - 6.7 Delete a Clerk Account

**6.3 Add a Role to a Clerk**

The Clerk Roles function allows a user to add roles to new or existing clerks.
1. Click **Next**. The Clerk Account panel will be displayed.

![Clerk Account Panel](image1.png)

**Figure 34** Clerk Account Panel

2. In the “Clerk Roles” section, select a role from the Available Roles box. To select more than one row, hold down the Ctrl key and click all applicable roles.

![Clerk Roles Section With Available Roles](image2.png)

**Figure 35** Clerk Roles Section With Available Roles
3. Click >. The selected role(s) will be added to the Assigned Roles box.

   Note: To add all available roles to the clerk, click >>.

   ![Figure 36 Clerk Roles Section With Assigned Roles]

4. Click Submit. A confirmation message will be displayed at the top of the page.

   ![Figure 37 User Successfully Updated Message]

   If an error message is received, correct the error(s) and click Submit again.
6.4 Remove a Role from a Clerk

1. Click **Next**. The Clerk Account panel will be displayed.

![Figure 38 Clerk Account Panel](image)

2. In the “Clerk Roles” section, select a role(s) from the Assigned Roles box. To select more than one row, hold down the Ctrl key and click all applicable roles.

![Figure 39 Clerk Roles Section with Assigned Roles](image)
3. Click <. The selected role(s) will be transferred to the Available Roles box.

   Note: To remove all of a clerk’s assigned roles, click <<.

![Clerk Roles Section With Role Removed](image)

**Figure 40** Clerk Roles Section With Role Removed

4. Click Submit. A confirmation message will be displayed at the top of the page.

![Confirmation Message](image)

**Figure 41** Confirmation Message

   If an error message is received, correct the error(s) and click Submit again.

### 6.5 Assign a Clerk Administrator

The Clerk Administrator checkbox allows a user to assign a clerk administrative rights. A clerk with administrative rights can create accounts for and manage clerks assigned to them.
1. Click **Next**. The Clerk Account panel will be displayed.

![Clerk Account Panel](image)

**Figure 42** Clerk Account Panel

2. In the “Clerk Roles” section, check the Clerk Administrator box.

![Clerk Roles Section](image)

**Figure 43** Clerk Roles Section With Clerk Administrator Checked
3. Click **Submit**. A confirmation message will be displayed at the top of the page.

![Confirmation Message](image)

**Figure 44** Confirmation Message

### 6.6 Reset a Clerk’s Password

1. On the Clerk Maintenance Search panel, click **Reset Password**. The Reset Password page will be displayed.

![Reset Password Page](image)

**Figure 45** Reset Password Page

2. Enter the new password (twice for confirmation). The password must be between eight–15 characters and must contain three different types of characters such as uppercase letters, lowercase letters, special characters, or numbers. The password must be unique and cannot contain information from the user name, contact first name, contact last name, or the security answers.

3. Click **Reset Password**. A confirmation message will be displayed at the top of the page.

![Confirmation Message](image)

**Figure 46** Confirmation Message

Note: Clerks must change the password set up by the administrative account the first time they log in.

If an error message is received, correct the error(s) and click **Reset Password** again.
6.7 Delete a Clerk Account

1. On the Clerk Maintenance Search panel, click **Remove Clerk** to initiate the record deletion. A dialog box confirming the deletion will be displayed.

![Dialog Box](Image)

**Figure 47** Dialog Box

2. Click **OK**. A confirmation message will be displayed at the top of the Clerk Maintenance Search page.

<table>
<thead>
<tr>
<th>The following messages were generated:</th>
</tr>
</thead>
<tbody>
<tr>
<td>The user's access has been removed for this provider.</td>
</tr>
</tbody>
</table>

**Figure 48** Confirmation Message
7 Add Organization

The Add Organization function allows users with an administrative account to add multiple organizations to an existing Portal account. This feature offers the convenience of managing multiple organizations within one Provider Portal account as an alternative to creating separate Provider Portal accounts for each organization.

After adding an organization to an account, users with an administrative account are authorized to perform all tasks as defined by the roles available for that organization.

In addition, account users granted the necessary permissions may move from one organization to another through the Switch Organization function without having to log out of the account.

To add an organization to an account:

1. Follow the steps in Section 2 Request Portal Access to request a PIN.
2. Once the user has received the PIN letter, access the ForwardHealth Portal at https://www.forwardhealth.wi.gov/.
3. Log in to the account to which the user wishes to add the new organization. The user’s secure Provider page will be displayed.
4. Click Account on the main menu at the top of the page. The Account Home page will be displayed.
5. Click Add Organization. The Add Organization page will be displayed.

![Add Organization Page](image)

Figure 49 Add Organization Page

6. Enter the PIN sent to the organization in the PIN letter.
Note: Each organization needs to request and receive a PIN in order to be added to an existing Portal account. After receiving a PIN, users should follow the steps for adding an organization to an existing account instead of the steps outlined in Section 3 Set Up an Account.

7. Enter the provider’s NPI or the Medicaid Provider ID in the Provider ID field.

8. Click Submit. A confirmation message will be displayed at the top of the page.

![Add Organization Page With Confirmation Message](image)

If the user receives an error message, correct the error(s) and click Submit again.

Once the organization is added to the Portal account, the user will be able to return to the Account Home page to switch to and perform tasks for the new organization’s account.

Note: If an administrative account has a new organization added to it, clerks set up under the initial organization are not automatically linked to the new organization. Clerk administrative and clerk accounts need to be added to the new organization via the Clerk Maintenance function. For more information, refer to Section 6.1 Add a Clerk.
9. Click **Account** on the main menu at the top of the page to return to the Account Home page. A dialog box will be displayed.

![Figure 51 Dialog Box](image)

10. Click **OK**. The Account Home page will be displayed.

11. For information about switching to the added organization, refer to Section 8 Switch **Organization**.
8 Switch Organization

Under the Switch Organization function:

- Users with administrative and clerk administrative accounts may assign roles to a clerk for a different organization within the same account without logging off.
- Clerks may perform tasks on behalf of multiple organizations within the same account without logging off.
- Users may change their default login organization.

8.1 Switch to Organization

1. On the Account Home page, click **Switch Organization**. The Switch Organization page will be displayed.

The NPI or Provider ID that the user is currently logged in under will be displayed at the top of the page, and a list of available organizations for that account will be displayed below.
2. To switch organizations, click on the row containing the applicable organization. The organization’s information will auto-populate in the “Currently Selected Provider” and “Newly Selected Provider” sections.

![Switch Organization Page With Auto-populated Information](image)

**Figure 53** Switch Organization Page With Auto-populated Information

3. If you wish to switch to the selected organization’s account, click **Switch To**. A dialog box will appear to confirm the selection.

![Dialog Box](image)

**Figure 54** Dialog Box

4. Click **OK**. The user will be returned to the secure Provider page. The NPI to which they switched will be displayed at the top of the page.

![Log In Information](image)

**Figure 55** Log In Information
8.2 Set As Default Login Organization

1. To make an organization the default login user, on the Switch Organization page, click the row of the desired organization. The organization’s information will auto-populate in the “Currently Selected Provider” and “Newly Selected Provider” sections.

![Switch Organization Page with Auto-populated Information](image1)

2. Click **Set As Default**. The Switch Organization page will refresh and check marks will be displayed in the Default Provider ID boxes for the selected organization.

![Switch Organization Page](image2)
The selected organization will automatically be the user each time they log into their account.
9 Messages

The Messages page acts as a one-way message center for providers to receive electronic notifications and provider publications from ForwardHealth. The most recent messages are also displayed on the user’s secure Provider page.

Messages are sent to the user’s account by ForwardHealth and are available from the date sent to the expiration date. A message is removed from the Messages page if the user manually removes it or if it is automatically removed on the expiration date set by ForwardHealth.

1. On the Account Home page, click **Messages**. The Messages page will be displayed.

   Note: If there is only one message, the message and “Message” section will be displayed.

2. Click the applicable message. The “Message” section will be displayed at the bottom of the page.
Figure 59 Message Section
To delete a message:

1. Check the Remove box next to the message.

```
<table>
<thead>
<tr>
<th>Category</th>
<th>Subject</th>
<th>Message</th>
<th>Date Sent</th>
<th>Expiration Date</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notification</td>
<td>Test 2</td>
<td>Claims submitted to ForwardHealth for services identified by unlisted (NOC) proc</td>
<td>10/08/2010</td>
<td>10/08/2011</td>
<td></td>
</tr>
<tr>
<td>Alert</td>
<td>This is for test ces</td>
<td>This is the message for testing test case 44615 to verify changes made to secure</td>
<td>10/22/2010</td>
<td>10/22/2011</td>
<td></td>
</tr>
<tr>
<td>Introduction</td>
<td>Testing more web mes</td>
<td>This is for test case 44645</td>
<td>12/29/2010</td>
<td>12/29/2011</td>
<td></td>
</tr>
<tr>
<td>Alert</td>
<td>Another web message</td>
<td>Testing web user name send to option</td>
<td>12/29/2010</td>
<td>12/29/2011</td>
<td></td>
</tr>
<tr>
<td>Alert</td>
<td>ForwardHealth Electr</td>
<td>You are receiving this message because you are listed as the Electronic Funds Tr</td>
<td>08/04/2011</td>
<td>09/03/2011</td>
<td></td>
</tr>
<tr>
<td>Alert</td>
<td>ForwardHealth Electr</td>
<td>You are receiving this message because you are listed as the Electronic Funds Tr</td>
<td>08/10/2011</td>
<td>09/09/2011</td>
<td></td>
</tr>
<tr>
<td>Alert</td>
<td>ForwardHealth Electr</td>
<td>You are receiving this message because you are listed as the Electronic Funds Tr</td>
<td>08/10/2011</td>
<td>09/09/2011</td>
<td></td>
</tr>
</tbody>
</table>
```

2. Click **Remove**. The message will be deleted from the Messages page.
10 Trading Files

Providers are able to download provider-specific files, such as rate information, using the Trade Files function. Documents available for download using this function are those that have been uploaded by ForwardHealth for the individual provider(s).

1. On the Trade Files home page, click File Download.

2. Select the applicable file type from the Transaction Type drop-down menu.
3. Click **Search**.

4. Click the applicable file from the list under Current Files Available for Download.

   ![Current Files Available for Download Panel](image)

   **Figure 63** Current Files Available for Download Panel

   A download dialog box will be displayed.

   ![Download Dialog Box](image)

   **Figure 64** Download Dialog Box

5. Click **Open**. The file will open and may be saved to the user’s computer or network.

### 10.1 Avoiding Download Errors

If errors occur when downloading documents, try the following:

- **Make certain to allow pop-ups on the Portal.** In Internet Explorer:
  - Go to **Tools > Pop-up Blocker > Pop-up Blocker Settings**.
  - Add **www.forwardhealth.wi.gov/** to the **Address of website to allow**.

- **Add the Portal website to your list of Trusted Sites.** For Internet Explorer:
  - Go to **Internet Options**.
  - Click the **Security tab**.
  - Select Trusted sites.
  - Click Sites.
  - Add **www.forwardhealth.wi.gov/** to the list.

- **Set the Trusted Sites security level** to the Medium-low default setting. For Internet Explorer:
  - Go to **Internet Options > Security**.
  - Click Trusted sites.
  - Click Default level.
  - Set the Security level slider to Medium-low.