ForwardHealth Provider Portal
Prior Authorization

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1 Introduction

Prior authorization (PA) is the electronic or written authorization issued by ForwardHealth to a provider prior to the provision of a service. In most cases, providers are required to obtain PA before providing services that require PA. When granted, a PA request is approved for a specific period of time and specifies the type and quantity of service allowed.

Providers can use the PA features on the ForwardHealth Portal to do the following:

- Submit a new PA
- Complete a saved PA request
- Check on a previously submitted PA
- Amend an approved PA
- Correct a returned PA
- Correct a returned PA amendment
- Print PA cover sheet
- Upload documents for a PA
2 Access the Prior Authorization Page


![ForwardHealth Portal Page](image1)

**Figure 1** ForwardHealth Portal Page

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

![ForwardHealth Portal Login](image2)

**Figure 2** ForwardHealth Portal Login

3. Enter the provider’s username.
4. Enter the provider’s password.
5. Click **Go!** The secure Provider page will be displayed.
6. Click **Prior Authorization** on the main menu at the top of the page. The Prior Authorization page will be displayed.

![Prior Authorization Page](image)

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**Figure 4** Prior Authorization Page

From the Prior Authorization page, providers can choose to do the following:

- Submit a new PA
- Complete a saved PA request
- Check on a previously submitted PA
- Amend an approved PA
- Correct a returned PA
- Correct a returned PA amendment
- Print PA cover sheet
- Upload documents for a PA

Providers having difficulties determining whether or not a service requires PA may refer to the [Online Handbook](#) or call Provider Services at 800-947-9627.
3 Submit a New Prior Authorization

To save time, providers can copy and paste information from plans of care and other medical documentation into the appropriate fields on a PA request. Except for those providers exempt from National Provider Identifier (NPI) requirements, NPI and related data are required on PA requests submitted via the Portal.

1. On the Prior Authorization page, click Submit a new PA. The Initial Information page will be displayed.

   **Note:** Fields marked with an asterisk (*) are required fields.

![Initial Information Page for Hospital Providers](image)

**Figure 5** Initial Information Page for Hospital Providers
2. In the “Process Type” section, scroll to and select the desired process type.

![Process Type Section](image)

**Figure 6** Process Type Section

3. The “HealthCheck ‘Other Service’” section defaults to No. Select Yes if the PA request is for a HealthCheck “Other Service.”

![HealthCheck “Other Service” Section](image)

**Figure 7** HealthCheck “Other Service” Section

*Note:* HealthCheck “Other Services” are available for members under 21 years of age to treat conditions identified during a HealthCheck screening.

4. In the “Program Financial Payer” section, select either BadgerCare Plus (TXIX), which includes BadgerCare Plus and Wisconsin Medicaid, or Wisconsin Chronic Disease Program (WCDP) as the financial payer.

![Program Financial Payer Section with BadgerCare Plus (TXIX) Selected](image)

**Figure 8** Program Financial Payer Section with BadgerCare Plus (TXIX) Selected

*Note:* If you are a hospital provider, you will need to select an NPI as the billing provider for the PA request from the drop-down menu in the “Billing Provider Number” section.

![Billing Provider Number Section](image)

**Figure 9** Select a Billing Provider Number
5. Click **Next**.

6. If there are not any processing notes for the selected process type, the Member Information page will be displayed. Proceed to step 9.

   If there are any processing notes for the selected process type, the Processing Notes page will be displayed.

   ![Processing Notes Page](Figure 10)

   **Figure 10** Processing Notes Page

7. Review the processing notes information.

8. Click **Next**. The Member Information page will be displayed.

   ![Member Information Page](Figure 11)

   **Figure 11** Member Information Page

9. Enter the member’s ID in the Member ID field.

10. Enter the member’s first name in the First Name field.

11. Enter the member’s last name in the Last Name field.

12. Enter the PA’s start date using MM/DD/CCYY format in the Requested Start Date field. The calendar icon located to the right of the Requested Start Date field may also be used to select a date.

   *Note:* If process type 123 - Hearing Aid was selected, the Requested Start Date field will only display the current date.

   *Note:* If process type 139 - DME (Oxygen and Oxygen-Related Services) was selected, a Place of Service (POS) field will be displayed under the Requested Start Date. Select the appropriate POS from the drop-down menu.
13. To verify the member’s information, click **Verify**. The page will refresh and if the member information is valid, additional information will be displayed.

![Member Information](image)

**Figure 12** Member Information Page with Verified Information

If the member is not found, an error message will be displayed at the top of the page. Correct the invalid information.

**The following messages were generated:**

Invalid member information. Check that the member's ID, first, and last name are correct and that the recipient is eligible on the Requested Start Date.

![Error Message](image)

**Figure 13** Example Error Message

*Note:* To clear information from all the fields on the page, click **Clear**.
14. Click **Next**. The Service Information page will be displayed.

![Service Information Page](image)

**Figure 14** Service Information Page

The fields on the Service Information page will vary depending on the process type selected on the Initial Information page. Enter all relevant information for the selected process type.

*Note:* If it is not possible to complete a PA request in one session, users may save a partially completed request at any time from this point until the request is submitted. For information on saving and retrieving partially completed PA requests, refer to Section 4 Save a Partially Completed Prior Authorization Request.

15. Enter the appropriate and most-specific *International Classification of Diseases* (ICD) diagnosis code most relevant to the service or product being requested.

*Note:* Do not use a decimal point when entering a diagnosis code.
• To search for a code, click **Search** to the right of the Primary Diagnosis Code field. The Primary Diagnosis Code Search box will be displayed.

![Primary Diagnosis Code Search Box](image15.png)

**Figure 15** Primary Diagnosis Code Search Box

• Enter a description of the code.
  
  o If the entire description is unknown, enter a key word.
  
  o If the exact description is unknown, use the percent symbol (%) on either side of a word to display all codes containing that word.

  *Note:* The ICD Version drop-down menu can be used to limit search results to either *International Classification of Diseases, Ninth Revision* (ICD-9) or *International Classification of Diseases, 10th Revision* (ICD-10) diagnosis codes.

• Click **Search**. Any results matching the query will be displayed in the “Search Results” section.

![Primary Diagnosis Code Search Box with Search Results Section](image16.png)

**Figure 16** Primary Diagnosis Code Search Box with Search Results Section

*Note:* Click the **Description** column heading to sort the results alphabetically. Click the heading once to sort the results in ascending order. Click the heading again to sort the results in descending order. Click **Next** or one of the page numbers at the bottom of the section to display additional results.
• Click the applicable code. The Primary Diagnosis Code Search box will close and the selected code information will populate the Primary Diagnosis Code and Primary Diagnosis Description fields.

![Figure 17 Primary Diagnosis Code and Description Populated](image)

16. Enter the secondary diagnosis code in the Secondary Diagnosis Code field, if applicable.

   *Note:* The date entered on the Member Information page will already be populated in the Requested Start Date field. If the date is incorrect, it must be corrected on the Member Information page.

17. In the Requesting Provider Signature field, enter the name of the provider who is requesting the service.

18. Enter the NPI of the prescribing/referring/ordering provider in the National Provider Identifier - Prescribing/Referring/Ordering Provider field when required.

19. Enter the name of the prescribing/referring/ordering provider in the Name - Prescribing/Referring/Ordering Provider field when required.

20. In the “Line Items” section, although not all the fields are required, enter as much information as possible.

   a. The Line Item field populates each time information is entered in the PA. The Line Item field starts with 01.

      *Note:* Up to 26 line items may be entered.

   b. Enter the ID of the provider who will provide the service in the Rendering Provider ID field. If the field is left blank, the billing provider’s number will be used by default.

   c. In the Rendering Provider Taxonomy field, enter the taxonomy code that identifies the rendering provider’s provider type and area of specialization.

   d. Select the type of service code being indicated from the Service Code Type drop-down menu.

      *Note:* For HealthCheck “Other Services,” include the procedure code that most accurately describes the service or product, even if the code is not ordinarily covered.

   e. Enter the service code in the Service Code field. To search for the code, click **Search** to the right of the field.
f. Once a service code has been entered, information will populate in the Service Code Description field.

g. Enter any additional information about the service code that is needed to describe the service requested in the Additional Service Code Description field.

h. Enter any appropriate modifier codes that apply to this PA process in one or more of the four Modifier fields.

i. Enter the appropriate POS code in the Place of Service field.

j. Enter the amount being requested (e.g., number of services, days' supply) for the selected procedure code in the Quantity Requested field.

k. Enter the provider's usual and customary charge for each service, procedure, or item requested in the Charge field.

If the quantity is greater than 1.0, multiply the quantity by the charge for each service, procedure, or item requested.

21. Click Verify to ensure the information entered is valid.

If a required field is left blank or if the information entered is invalid, an error message will be displayed at the top of the page. Correct the error and click Verify again.

22. If the entered information is valid, a validation message will be displayed at the top of the page.

• To add additional line items to the PA request, click Add and enter the appropriate information.

• To cancel the PA request or delete a saved PA request, click Cancel.
To save the partially completed request to be completed at a later time, click **Save and Complete Later**. For information on saving and retrieving partially completed PA requests, refer to Section 4 Save a Partially Completed Prior Authorization Request.

22. Click **Next** to continue. The Required Attachments page will be displayed.

---

**Figure 21** Required Attachments Page

The Required Attachments page indicates the following information:

- **Attachment** — Displays the title of the required attachment.
- **Submission Method** — Displays submission options users can select.
  - If you wish to submit documentation via the web, refer to Section 3.1 Submission Method — Web.
  - If you wish to submit documentation via Electronic Upload, refer to Section 3.2 Submission Method — Electronic Upload.
  - If you wish to submit documentation via Mail or Fax, refer to Section 3.3 Submission Method — Mail or Fax.
  - If you wish to submit a HealthCheck “Other Services” request, refer to Section 3.4 Health check request – No Attachment is needed.
- **Notes** — Explain the steps required to complete the submission using the selected submission method.

*Note:* If more than one attachment is required, choose a submission method for each of the attachments before clicking Next.

### 3.1 Submission Method — Web

If the service-specific PA attachment (e.g., Prior Authorization/Therapy Attachment, Prior Authorization/Physician Attachment) will be completed on the Portal, the PA attachment form
must be completed online before the PA request can be submitted. If needed, providers can use the Additional Information field at the end of the PA attachment to enter up to five pages of text.

*Note:* Certain PA attachments cannot be completed online or uploaded. These PA attachments can only be submitted via mail or fax.

1. Select **Web** from the Submission Method drop-down menu.
2. Read the Notes for further instructions.
3. Click **Next**. The required attachment form for your specific PA will be displayed. The example below shows a Therapy Attachment form.
Refer to the ForwardHealth Forms page of the Portal for instructions for specific attachments.

4. Complete the attachment form.

5. Click Verify.
If a required field is left blank or if the information entered is invalid, an error message will be displayed at the top of the page.

![Figure 23 Example Error Message](image)

If there are no problems with the form, no message will appear.

6. Click **Next**. The PA Summary page will be displayed.

![Figure 24 PA Summary Page](image)
7. To view a draft of your PA request, click **Preview PA Request**. A draft PDF version of the PA request will open in a new window.

![Draft PDF Version of PA Request](image-url)

**Figure 25** Draft PDF Version of PA Request
8. Review the draft to ensure the entered information is accurate.

9. Place a check in the appropriate box indicating how you are submitting additional supporting clinical information (mail or fax or uploading electronically).

10. Click Submit.

   Note: This is the last opportunity to save the request and complete it at a later time. The request cannot be edited once it is submitted.

If you chose to upload additional supporting clinical information electronically, the File Upload page will be displayed.

![File Upload Page](image-url)

Figure 26 File Upload Page
a. Click **Browse**. The Choose file window will be displayed.

![Figure 27 Choose File Window](image)

b. Browse to and select the desired file.

c. Click Open. The Choose file window will close and the file path will display in the File Path field.

d. Click **Upload**. The uploaded file will be displayed in the “List of Files Uploaded” section.

![Figure 28 Lists of Files Uploaded Section](image)

e. Upload as many files as necessary.
f. Click **Next**. The Confirmation of Receipt page will be displayed.

![Confirmation of Receipt Page](image)

**Figure 29** Confirmation of Receipt Page

g. Proceed to **step 11**.

If you chose to mail or fax additional supporting clinical information, the Print the PA Cover Sheet page will be displayed.

![Print the PA Cover Sheet Page](image)

**Figure 30** Print the PA Cover Sheet Page

a. Read the instructions on the Print the PA Cover Sheet page.
b. Click **Get PA Cover Sheet**. A PDF version of the PA cover sheet will open in a new window.

![PDF Version of the PA Cover Sheet](image)

**Figure 31** PDF Version of the PA Cover Sheet

c. To print or save the PA cover sheet to your hard drive or network location, use the Print or Save As function of the browser. If you have problems printing or saving the PA cover sheet, click the link that appears at the top of the Print the PA Cover Sheet page.

![Get PA Cover Sheet Link](image)

**Figure 32** Get PA Cover Sheet Link

*Note: If the PA cover sheet and required attachments are not received within 30 days, the PA request will be inactivated. A new PA request will need to be submitted.*
d. Click **Next**. The Confirmation of Receipt page will be displayed.

![Confirmation of Receipt Page](image-url)

**Figure 33** Confirmation of Receipt Page
11. Click **Print PA Request** to view, print, or save a PDF version of the PA request for your records.

![PDF Version of PA Request](image_url)

**Figure 34**  PDF Version of PA Request
12. To print or save the PA request to your hard drive or network location, use the Print or Save As function of the browser.

13. Click Return to menu to be redirected to the Prior Authorization page.

### 3.2 Submission Method — Electronic Upload

To help reduce the chance of a PA request being returned for clerical errors, ForwardHealth recommends completing the PA attachment online as opposed to uploading an electronically completed version of the paper attachment form.

*Note:* Certain PA attachments cannot be completed online or uploaded. These PA attachments can only be submitted via mail or fax.

1. Select **Electronic Upload** from the Submission Method drop-down menu.

2. Read the Notes for further instructions.
3. Click **Next**. The PA Summary page will be displayed.

![PA Summary Page](image)

**Figure 36** PA Summary Page
4. To view a draft of your PA request, click **Preview PA Request**. A draft PDF version of the PA request will open in a new window.

![Figure 37: Draft PDF Version of PA Request](image_url)
5. Review the draft to ensure the entered information is accurate.

6. Check the **By uploading electronically** box.

7. Click **Submit**. The File Upload page will be displayed.

    *Note*: This is the last opportunity to save the request and complete it at a later time. The request cannot be edited once it is submitted.

---

**Figure 38**  File Upload Page
8. Click **Browse**. The Choose file window will be displayed.

![Figure 39 Choose File Window](image)

9. Browse to and select the desired file.

10. Click **Open**. The Choose file window will close and the file path will display in the File Path field.

11. Click **Upload**. The uploaded file will be displayed in the “List of Files Uploaded” section.

![Figure 40 Lists of Files Uploaded Section](image)

12. Upload as many files as necessary.
13. Click **Next**. The Confirmation of Receipt page will be displayed.

![Confirmation of Receipt](image_url)

**Figure 41** Confirmation of Receipt Page
14. Click **Print PA Request** to view, print, or save a PDF version of the PA request for your records.

![Figure 42](image-url)
15. Click **Return to menu** to be redirected to the Prior Authorization page.

### 3.3 Submission Method — Mail or Fax

1. Select **Mail or Fax** from the Submission Method drop-down menu.

   ![Required Attachments Page](image1)

   **Figure 43** Required Attachments Page

2. Read the Notes for further instructions.

3. Click **Next**. The PA Summary page will be displayed.

   ![PA Summary Page](image2)

   **Figure 44** PA Summary Page
4. To view a draft of your PA request, click **Preview PA Request**. A draft PDF version of the PA request will open in a new window.

![Figure 45 Draft PDF Version of PA Request](image-url)
Note: This preview is a draft PDF version of the PA request and must not be used to submit the PA request via mail or fax. Once the PA request is submitted, a version will be available for you to save or print for your records.

5. Review the draft to ensure the entered information is accurate.

6. Check the By mail or fax box.

7. Click Submit. The Print the PA Cover Sheet page will be displayed.

Note: This is the last opportunity to save the request and complete it at a later time. The request cannot be edited once it is submitted.

8. Read the instructions on the Print the PA Cover Sheet page.
9. Click **Get PA Cover Sheet**. A PDF version of the PA cover sheet will open in a new window.

![Figure 47 PDF Version of the PA Cover Sheet](image)

10. To print or save the PA cover sheet to your hard drive or network location, use the Print or Save As function of the browser. If you have problems printing or saving the PA cover sheet, click the link that appears at the top of the Print the PA Cover Sheet page.

![Figure 48 Get PA Cover Sheet Link](image)

**Note:** If the PA cover sheet and required attachments are not received within 30 days, the PA request will be inactivated. A new PA request will need to be submitted.
11. Click **Next**. The Confirmation of Receipt page will be displayed.

![Figure 49 Confirmation of Receipt Page](image)

Your PA Request has been submitted.

**PA Number:** 5131990001

- You will receive a notification in the PA section of your Portal Provider home page after your PA request is reviewed.
- **Print PA Request**
  You may view, print, and save a PDF version of this PA request for your records.
- **Return to menu**
  Return to the PA main menu.
12. Click **Print PA Request** to view, print, or save a PDF version of the PA request for your records.

![Figure 50 PDF Version of PA Request](image-url)
13. Click **Return to menu** to be redirected to the Prior Authorization page.

### 3.4 Submission Method – Health check request – No Attachment is needed

Providers submitting a PA request for HealthCheck “Other Services,” can submit the request without including a specific PA attachment. If the provider is unclear which attachment form to use, the provider can submit the clinical rationale and documentation (e.g., test results or clinical notes) with the PA/RF.

1. Select **Health check request – No Attachment is needed** from the Submission Method drop-down menu.

![Image of Required Attachments Page]

**Figure 51** Required Attachments Page

2. Read the Notes for further instructions.
3. Click **Next**. The PA Summary page will be displayed.

![PA Summary Page](image)

Figure S2  PA Summary Page

4. To view a draft of your PA request, click **Preview PA Request**. A draft PDF version of the PA request will open in a new window.
5. Review the draft to ensure the entered information is accurate.
6. Place a check in the appropriate box indicating how you are submitting additional supporting clinical information (mail or fax or uploading electronically).

7. Click **Submit**.

   *Note*: This is the last opportunity to save the request and complete it at a later time. The request cannot be edited once it is submitted.

If you chose to upload additional supporting clinical information electronically, the File Upload page will be displayed.

![File Upload Page](image)

**Figure 54** File Upload Page
a. Click **Browse**. The Choose file window will be displayed.

![Choose File Window](image)

**Figure 55** Choose File Window

b. **Browse** to and select the desired file.

c. **Click Open**. The Choose file window will close and the file path will display in the File Path field.

d. **Click Upload**. The uploaded file will be displayed in the “List of Files Uploaded” section.

![List of Files Uploaded](image)

**Figure 56** Lists of Files Uploaded Section

e. **Upload** as many files as necessary.
f. Click **Next**. The Confirmation of Receipt page will be displayed.

![Confirmation of Receipt Page](image)

**Figure 57** Confirmation of Receipt Page

g. Proceed to **step 9**.

If you chose to mail or fax additional supporting clinical information, the Print the PA Cover Sheet page will be displayed.

![Print the PA Cover Sheet Page](image)

**Figure 58** Print the PA Cover Sheet Page

a. Read the instructions on the Print the PA Cover Sheet page.
b. Click **Get PA Cover Sheet.** A PDF version of the PA cover sheet will open in a new window.

![Figure 59 PDF Version of the PA Cover Sheet](image)

**Note:** If the PA cover sheet and required attachments are not received within 30 days, the PA request will be inactivated. A new PA request will need to be submitted.

c. To print or save the PA cover sheet to your hard drive or network location, use the Print or Save As function of the browser. If you have problems printing or saving the PA cover sheet, click the link that appears at the top of the Print the PA Cover Sheet page.

![Figure 60 Get PA Cover Sheet Link](image)
8. Click **Submit**. The Confirmation of Receipt page will be displayed.

![Confirmation of Receipt](image)

**Figure 61** Confirmation of Receipt Page
9. Click **Print PA Request** to view, print, or save a PDF version of the PA request for your records.

---

**Figure 62**  PDF Version of PA Request
10. Click **Return to menu** to be redirected to the Prior Authorization page.
4 Save a Partially Completed Prior Authorization Request

If a PA request cannot be completed in one session, users may save the partially completed request without losing entered data.

Users may save PA requests at any point after the Member Information page and any required processing notes have been completed. Once a request is submitted, users will not be able to save the request to complete at a later date.

Users are able to retrieve the partially completed PA request at a later time and either complete the request and submit it or delete it. For additional information, refer to Section 5 Complete a Saved Prior Authorization Request.

Note: The ability to save partially completed PA requests only applies to new PA requests. Providers will not be able to save partially completed PA amendments or corrections to returned PA requests or amendments.

A Save and Complete Later button is available at the bottom of the Service Information page and each succeeding page until the request is submitted.

1. Click **Save and Complete Later** on any page where the button is available.

   ![Save and Complete Later Button](Figure 63)

   The Save Confirmation page will be displayed.

   ![Save Confirmation Page](Figure 64)

   2. Click **Exit** to be redirected to the Prior Authorization page.
5 Complete a Saved Prior Authorization Request

A partially completed PA request can be retrieved at any time within 30 days from the last time it was saved.

Providers are required to submit or re-save a PA request within 30 calendar days of the date the PA request was last saved. After 30 calendar days of inactivity, a PA request will be automatically deleted, and the provider will have to re-enter the request.

1. On the Prior Authorization page, click Complete a saved PA request.

Figure 65  Complete a Saved PA Request Link
The Complete a Saved PA Request page will be displayed.

The Complete a Saved PA Request page displays all of the provider’s PA requests that have been saved.

Any saved requests that have been deleted due to inactivity will be listed at the bottom of the page. The list will not include PA requests deleted by the provider. This list is for informational purposes only. Neither providers nor ForwardHealth will be able to retrieve PA requests that have been deleted.
2. Click the PA request you wish to complete or delete. The fields will populate with information regarding the selected PA request.

**Figure 67** Complete a Saved PA Request Page with Populated Information

To delete the selected request, click **Delete**. A dialog box will be displayed. Click **OK** to delete the request.
3. Click **Next** to open a saved PA request. The Initial Information page will be displayed.

![Figure 68 Saved Initial Information Page](image)

4. Verify the information on this page. Users **cannot** change the process type after the PA has been saved. If the process type needs to be changed, the saved PA request should be deleted, and a new PA request started.

5. If the information is correct, click **Next**. The Member Information page will be displayed.

![Figure 69 Saved Member Information Page](image)

6. Verify the information on this page. Information on this page may have changed.
7. Click **Next**. The Service Information page will be displayed.

![Figure 70 Saved Service Information Page](image)

8. To continue completing the PA request, follow the instructions beginning at **step 15** under Section 3 Submit a New Prior Authorization.

If the PA request cannot be completed at this time, users can save the request and finish it at a later time by clicking **Save and Complete Later**. PA requests may be saved as many times as necessary as long as users submit or re-save the request within 30 calendar days of the date the request was last saved. After 30 calendar days of inactivity, the request will be automatically deleted, and users will need to start a new request.
6 Check on a Previously Submitted Prior Authorization

On the Prior Authorization page, click **Check on a previously submitted PA**. The Find PA Record page will be displayed.

![Find PA Record Page](image)

**Figure 71** Find PA Record Page

You can find a PA by either entering a PA number or entering information in one or more of the data fields.

### 6.1 Search by Prior Authorization Number

1. Enter the PA number in the PA number field.

![Search by PA Number](image)

**Figure 72** Search by PA Number
2. Click **View PA Record**. If no results match the search, an error message will be displayed at the top of the page.

   **The following messages were generated:**
   **PA Number is invalid.**

   **Figure 73** Example Error Message

   If the entered PA number is valid, the PA Record page will be displayed.

   **Figure 74** PA Record Page

3. Click **Exit** to return to the Prior Authorization page.

### 6.2 Search by Other Criteria

If the PA number is unknown, you can search for the PA using any of the remaining fields on the page. To refine your search, enter information in more than one field.

1. Enter or select information for any of the following fields:
• Process Type
• Provider ID

*Note:* To search by Provider ID, you must be logged into a hospital account.
• Member ID
• Requested Start Date
• PA Status
• Amendment Status

To view all previously submitted PAs, leave all the fields blank.

![Figure 75 Search by Other Criteria]

2. Click **Search**.

If no results match the criteria entered, an error message will be displayed at the top of the page. Revise your search criteria and click **Search** again.

![Figure 76 Example Error Message]
If the entered information is valid, the Choose PA Record page will be displayed.

![Choose PA Record Page](image)

**Figure 77** Choose PA Record Page

*Note:* To sort the results by category, click a column heading once to sort the results in ascending order. Click the heading again to sort the results in descending order.

3. Select the PA you wish to view. The PA Record page will be displayed.

![PA Record Page](image)

**Figure 78** PA Record Page
4. Click **Exit** to return to the Prior Authorization page.

### 6.3 Change Suspended Prior Authorization Status

If the selected PA is in a status of *Suspended — Provider Sending Info*, providers have the option of changing the PA status from *Suspended* to *Pending* if it is determined that additional information will not need to be mailed or faxed.

1. On the Prior Authorization page, click **Check on a previously submitted PA**. The Find PA Record page will be displayed.

![Figure 79 Find PA Record Page](image)
2. Search for the PA.
   - If you search by PA number, the PA Record page will be displayed.
   - If you search by other criteria, the Choose PA Record page will be displayed. Select the PA you wish to view to display the PA Record page.

Figure 80  PA Record Page with Change Prior Authorization Status Section
3. Check the box in the “Change Prior Authorization Status” section of the PA Record page.

![Figure 81 Change Prior Authorization Status Section](image)

4. If necessary, add notes explaining or commenting on why the PA can be processed without additional clinical documentation in the Comments box.

5. Click **Submit**.

If there were any problems with the submission, an error message will be displayed at the top of the page.

```
The following messages were generated:
To update the PA status, the additional supporting documentation response is required.
```

![Figure 82 Example Error Message](image)

If the submission was successful, a confirmation message will be displayed at the top of the page.

```
The following messages were generated:
Your request to update the prior authorization status has been successfully sent.
```

![Figure 83 Confirmation Message](image)

*Note:* The PA will still show a suspended status even though the status change was successful. To verify the status change, search for the PA again using the PA number. The current status of the PA will be displayed at the top of the PA Record page.

6. Click **Exit** to return to the Prior Authorization page.
7 Amend an Approved Prior Authorization

1. On the Prior Authorization page, click **Amend an approved PA**. The Find PA Record page will be displayed.

![Find PA Record Page](image)

**Figure 84** Find PA Record Page

The PA Status field will already be populated with an *Approved* status.
2. Search for the PA you wish to amend.

For information on searching for a submitted PA, refer to Section 6 Check on a Previously Submitted PA.

- If you search by PA number, the PA Record page will be displayed.
- If you search by other criteria, the Choose PA Record page will be displayed. Select the PA you wish to view to display the PA Record page.

![PA Record Page](image)

**Figure 85** PA Record Page
3. To view the decision for this PA, click **View PA Decision Notice**. An OnBase Document Viewer window will open and display Document Results.

   *Note*: If only one document is listed, a PDF version of the PA Decision Notice letter will automatically open in the same window.

![Figure 86 OnBase Document Viewer Window](image)

4. To print or save the PA Decision Notice to your hard drive or network location, use the Print or Save As function of the browser.

6. On the PA Record page, click **Amend this PA**. The Amendment Request page will be displayed.

   ![Amendment Request Page](image)

   **Figure 87** Amendment Request Page

7. In “SECTION III - AMENDMENT INFORMATION”, although not all the fields are required, enter as much information as possible.

   - In the Requested Start Date field, enter the start date requested for the amendment in MM/DD/CCYY format.

   - If the end date is different from the current expiration date, enter the end date requested for the amendment in MM/DD/CCYY format in the Requested End Date field.

   - In the “Reason for Amendment Request (Check All That Apply)” section, check a reason(s) for the amendment request.
• Enter a note describing and explaining the change in the Description and Justification for Requested Change box (enter information for each reason selected).

• If additional supporting clinical documentation is needed, check the appropriate box indicating whether you plan to mail or fax or upload the additional documents.

• In the Signature — Requesting Provider field, enter the signature of the provider that requested the original PA.

• In the Date Signed — Requesting Provider field, enter the date the amendment request was signed by the requesting provider in MM/DD/CCYY format.

8. Click **Submit**.

• If no additional clinical documentation is needed and the amendment request was submitted successfully, the **Confirmation of Receipt** page will be displayed.

• If you are mailing or faxing additional clinical documentation, the Cover Sheet page will be displayed.
  - Click **Get PA Cover Sheet**. A PDF version of the PA cover sheet will open in a new window.
  - Print or save the PA cover sheet.
  - Close the window.
  - On the Cover Sheet page, click **Next**. The **Confirmation of Receipt** page will be displayed.
If you are uploading additional clinical documentation, the File Upload page will be displayed.

- In the “Upload File” section, click Browse. The Choose file window will be displayed.
- Browse to and select the desired file.
- Click Open. The Choose file window will close and the file path will display in the File Path field.
- Click Upload. The uploaded file will be displayed in the “List of Files Uploaded” section.
- Upload as many files as necessary.
o Click **Next**. The Confirmation of Receipt page will be displayed.

![Confirmation of Receipt](image)

**Your PA amendment request has been submitted.**

- **Print amendment request**
  You may view, print and save a copy of the PA amendment request for your personal records.

- **Return to menu**
  Return to the PA main menu.

Figure 89  Confirmation of Receipt Page
9. To view, print, or save a copy of the amendment request, click **Print amendment request**. A PDF version of the amendment request will be displayed in a separate browser window.

![PDF Version of PA Amendment Request](image-url)

---

**Figure 90** PDF Version of PA Amendment Request
10. Use the browser functions to print or save the amendment request.  
   
   *Note:* This copy of the amendment request is strictly for recordkeeping. 

11. Click **Return to menu** to be redirected to the Prior Authorization page.
8 Correct a Returned Prior Authorization

1. On the Prior Authorization page, click Correct a returned PA. The Find PA Record page will be displayed.

   ![](Find_PA_Record.png)

   **Figure 91** Find PA Record Page

   The PA Status field will already be populated with Returned — Provider Review.

2. Search for the PA you wish to correct.

   For information on searching for a submitted PA, refer to Section 6 Check on a Previously Submitted PA.
If you search by PA Number, the PA Record page will be displayed.

If you search by other criteria, the Choose PA Record page will be displayed. Select the PA request you wish to correct. Choose PA Record Page

The PA Record page will be displayed.

**Figure 92** PA Record Page
3. To view the latest PA returned letter, click **View latest PA Returned letter**. An OnBase Document Viewer window will open and display Document Results.

![OnBase Document Viewer Window](image1)

**Figure 93** OnBase Document Viewer Window

If multiple documents are listed, select the letter you wish to view to open it.

![PDF Version of Returned Provider Review Letter](image2)

**Figure 94** PDF Version of Returned Provider Review Letter

4. To print or save the Returned Provider Review Letter to your hard drive or network location, use the Print or Save As function of the browser.
5. Close the OnBase Document Viewer and PDF viewer windows.
6. Review the information on the PA Record page.
7. Click Correct this PA. The Initial Information page will be displayed.

![Initial Information Page](image)

8. Click View Letter to review the latest Returned Provider Review Letter. The letter indicates what information needs to be changed or corrected in the PA. An OnBase Document Viewer window will open and display Document Results.

![OnBase Document Viewer Window](image)
If multiple documents are listed, select the letter you wish to view to open it.

![PDF Version of Returned Provider Review Letter](image)

**Figure 97** PDF Version of Returned Provider Review Letter

9. To print or save the Returned Provider Review Letter to your hard drive or network location, use the Print or Save As function of the browser.


11. Make any necessary changes on the Initial Information page.

   *Note:* Changing information on this page will change information that is entered on other PA request pages. Inaccurate information can create delays or problems with processing the resubmitted PA.
12. Click **Next**. If the selected process type has a note associated with it, the Processing Notes page will be displayed.

![Figure 98 Processing Notes Page](image)

13. Read the note and click **Next**. The Member Information page will be displayed.

![Figure 99 Member Information Page](image)

14. Make any necessary changes on the Member Information page.
15. Click **Next**. The Service Information page will be displayed.

![Service Information Page](image1)

**Figure 100** Service Information Page

16. Enter the requesting provider’s signature.

17. Make any necessary changes on the Service Information page.

18. Click **Verify** to update the changes. A message will be displayed at the top of the page indicating if the PA is ready for submission or if an error is found.

![Valid Prior Authorization Message](image2)

**Figure 101** Valid Prior Authorization Message

If there is an error, correct the error and click **Verify** again.

To add another line item, click **Save**. The current row will load and a new row will be displayed.
19. Click **Next**. The Required Attachments page will be displayed.

![Required Attachments Page](image)

**Figure 102** Required Attachments Page

20. Select a Submission Method from the drop-down menu.

- If you select Web, refer to Section 3.1 Submission Method — Web for more information.
- If you select Electronic Upload, refer to Section 3.2 Submission Method — Electronic Upload for more information.
- If you select Mail or Fax, refer to Section 3.3 Submission Method — Mail or Fax for more information.
- Select **Already Submitted** if the attachment sent for the original PA request is still valid.
  - Click **Next**. The PA Summary page will be displayed.
  - To view a draft of your PA request, click **Preview PA**. A draft PDF version of the PA request will open in a new window.
  - Review the draft to ensure the entered information is accurate.
  - Close the window.
  - Click **Submit**. The Confirmation of Receipt page will be displayed.
  - Click **Print PA Request** to view, print, or save a PDF version of the PA request for your records.

21. Click **Return to menu** to be redirected to the Prior Authorization page.
9 Correct a Returned Prior Authorization Amendment

1. On the Prior Authorization page, click Correct a returned PA amendment. The Find PA Record page will be displayed.

![Find PA Record Page](image)

**Figure 103** Find PA Record Page

The PA Status field will already be populated with an Approved status and the Amendment Status field will already be populated with a Returned — Provider Review status.

2. Search for the PA you wish to correct.

   For information on searching for a PA, refer to Section 6 Check on a Previously Submitted PA.

   If you search by PA Number, the PA Record page will be displayed.
If you search by other criteria, the Choose PA Record page will be displayed. Select the PA request you wish to correct.

**Figure 104** Choose PA Record Page
The PA Record page will be displayed.

**Figure 105** PA Record Page
3. Click **View PA Decision Notice** to view the decision on the approved PA. An OnBase Document Viewer window will open and display Document Results.

*Note:* If only one document is listed, a PDF version of the PA Decision Notice letter will automatically open in the same window.

![OnBase Document Viewer Window](image)

**Figure 106** OnBase Document Viewer Window

4. To print or save the PA Decision Notice letter to your hard drive or network location, use the Print or Save As function of the browser.

5. Close the OnBase Document Viewer window and the PDF viewer window.
6. Click **View latest Amendment Returned Letter** to view the most recent PA Amendment Returned Provider Review Letter. An OnBase Document Viewer window will open and display Document Results.

   **Note:** If only one document is listed, a PDF version of the PA Decision Notice letter will automatically open in the same window.

![OnBase Document Viewer](image)

**Figure 107** OnBase Document Viewer

7. To print or save the PA Amendment Returned Provider Review Letter to your hard drive or network location, use the Print or Save As function of the browser.

9. **Click Correct PA Amendment.** The Amendment Request page will be displayed.

![Amendment Request Page](image)

**Figure 108** Amendment Request Page

10. In “SECTION III - AMENDMENT INFORMATION,” although not all the fields are required, enter as much information as possible:

- In the Requested Start Date field, enter the start date requested for the amendment in MM/DD/CCYY format.

- If the end date is different from the current expiration date, enter the end date requested for the amendment in MM/DD/CCYY format in the Requested End Date field.

- In the “Reason for Amendment Request (Check All That Apply)” section, check a reason(s) for the amendment request.

- Enter a note describing and explaining the change in the Description and Justification for Requested Change box (enter information for each reason selected).
• If additional supporting clinical documentation is needed, check the appropriate box indicating whether you plan to mail or fax or upload the additional documents.

• In the Signature — Requesting Provider field, enter the signature of the provider that requested the original PA.

• In the Date Signed — Requesting Provider field, enter the date the amendment request was signed by the requesting provider in MM/DD/CCYY format.

11. Click Submit. If no additional clinical documentation is needed, the Confirmation of Receipt page will be displayed.

![Confirmation of Receipt](image)

**Your PA amendment request has been submitted.**

- **Print amendment request**
  You may view, print and save a copy of the PA amendment request for your personal records.

- **Return to menu**
  Return to the PA main menu.

Figure 109 Confirmation of Receipt Page
12. To view, print, or save the PA amendment request, click **Print amendment request**. A PDF version of the PA amendment request will open in a new window.

![PDF Version of PA Amendment Request](image)

**Figure 110** PDF Version of PA Amendment Request
13. To print or save the PA amendment request to your hard drive or network location, use the Print or Save As function of the browser.

14. Click Return to menu to be redirected to the Prior Authorization page.
10 Print Prior Authorization Cover Sheet

In order to generate and print new copies of PA cover sheets for previously submitted PAs, the PA must be in a Suspended — Provider Sending Information status and a cover sheet for the specific PA must not have already been sent to ForwardHealth.

1. On the Prior Authorization page, click **Print PA cover sheet**. The Generate PA Cover Sheet page will be displayed.

2. Enter a PA number in the PA Number field.

3. Click **Search**.
If the entered PA number is inaccurate or invalid, an error message will be displayed at the top of the page.

The following messages were generated:
- The prior authorization number was not found.

Figure 112 Example Error Message

Ensure the PA number is accurate and click **Search** again. The PA request’s information will populate in the fields in the “Selected Results” section.

Figure 113 Generate PA Cover Sheet Page with Populated Information
4. Click **Generate Coversheet**. A PDF version of the cover sheet will open in a new browser window.

![Figure 114 PDF Version of a PA Cover Sheet](image)

5. To print or save the cover sheet to your hard drive or network location, use the Print or Save As function of the browser.
11 Upload Documents for a Prior Authorization

Providers may submit additional clinical documentation for a PA request that is in a Suspended or Pending status. For PA requests in a suspended status, providers may change the status from Suspended to Pending before uploading the required documentation.

Providers can upload documents in the following formats:

- Joint Photographic Experts Group (JPEG) (.jpg or .jpeg)
- Portable Document Format (PDF) (.pdf)
- Rich Text Format (.rtf)
- Text File (.txt)
- OrthoCAD™ (.3dm) (for dental providers)

Note: Microsoft® Word files (.doc) cannot be uploaded but can be saved and uploaded in .rtf or .txt formats.

2. Enter the PA number of the pending or suspended PA in the PA Number field.

3. Click **Search**.

   If the PA number is invalid or inaccurate, an error message will be displayed at the top of the page. Correct the error and click **Search** again.

   If the PA number is valid, the PA request’s information will populate in the fields in the “Selected Results” section.

![Prior Authorization File Upload Page with Populated Information](image)

*Figure 116* Prior Authorization File Upload Page with Populated Information
4. Click **Next**. The File Upload page will be displayed.

![File Upload Page](image)

**Figure 117**  File Upload Page

5. In the “Upload File” section, click **Browse**.

![Upload File Section](image)

**Figure 118**  Upload File Section
The Choose file window will be displayed.

![Choose File Window](image1)

**Figure 119** Choose File Window

6. Browse to and select the desired file.

7. Click **Open**. The Choose file window will close and the file path will display in the File Path field.

8. Click **Upload**. The uploaded file will be displayed in the “List of Files Uploaded” section.

![List of Files Uploaded](image2)

**Figure 120** List of Files Uploaded Section

9. Upload as many files as necessary.

10. When all files have been uploaded, click **Exit**. You will be returned to the Prior Authorization page.
Note: When the PA request is in a pending status and the provider uploads additional supporting clinical documentation, there may be up to a four-hour delay before the documentation is available to ForwardHealth in the system. If the uploaded information was received after the PA request was processed and the PA was returned for missing information, the provider may resubmit the PA request stating that the missing information was already uploaded.

11.1 Change Suspended Prior Authorization Status to Pending

Note: To change a PA status from Suspended to Pending when there are no additional documents to upload, refer to Section 6.3 Change Suspended Prior Authorization Status.

2. Enter the PA number of the suspended PA in the PA Number field.
3. Click Search.

If the PA number is invalid or inaccurate, an error message will be displayed at the top of the page. Correct the error and click Search again.

If the PA number is valid, the PA request’s information will populate in the fields in the “Search Results” section.

![Figure 121](image-url)  
Figure 121. Prior Authorization File Upload Page with Populated Information
4. Click **Next**. The File Upload page will be displayed.

![File Upload](image1.png)

**Figure 122** File Upload Page

5. If no additional supporting documentation is to be sent via mail or fax, check the box in the “Change Prior Authorization Status” section to change the PA status from **Suspended** to **Pending**.

![Change Prior Authorization Status](image2.png)

**Figure 123** Change Prior Authorization Status Section

*Note:* The box in the “Change Prior Authorization Status” section must be checked **before** uploading additional supporting documentation.

6. Upload the necessary additional supporting documentation. For more information, refer to the instructions beginning at **step 5** of Section 11 Upload Documents for a Prior Authorization.
12 Configure Web Browser

Note: This user guide uses Internet Explorer™ as an example. If you use another web browser, the options or settings may appear slightly different.

You must have Internet Explorer™ 6.0 or later to access documents. If you receive an error message or are unable to access a document (e.g. a PA cover sheet, a Returned Provider Review Letter, or a Decision Notice), you may need to change some of your Internet Explorer™ settings.

12.1 Allow Pop-ups from ForwardHealth

1. Click **Tools** on the Internet browser’s menu bar. A drop-down menu will be displayed.

![Tools Drop-down Menu](image-url)
2. From the Pop-up Blocker menu, select **Pop-up Blocker Settings**. The Pop-up Blocker Settings window will be displayed.

![Pop-up Blocker Settings Window](image)

**Figure 125** Pop-up Blocker Settings Window

3. In the Address of website to allow: field, enter **www.forwardhealth.wi.gov**.
4. Click Add.

![Figure 126 Pop-up Blocker Settings Window](image)

The ForwardHealth web address will be alphabetically added to the list of Allowed sites.

![Figure 127 Pop-up Blocker Settings Window with Added Web Site](image)
5. Click **Close**.

### 12.2 Add ForwardHealth as a Trusted Site

1. Click **Tools** on the Internet browser’s menu bar. A drop-down menu will be displayed.

![Tools Drop-down Menu](image)

**Figure 128** Tools Drop-down Menu
2. Click **Internet Options**. The Internet Options window will be displayed.

![Internet Options Window](image)

**Figure 129** Internet Options Window

3. Click the **Security** tab at the top of the window.
4. Under the “Select a zone to view or change security settings” section, click **Trusted sites**.

![Internet Options Window](image1)

**Figure 130** Internet Options Window

5. Click **Sites**. The Trusted sites window will be displayed.

![Trusted Sites Window](image2)

**Figure 131** Trusted Sites Window
The website that you currently have opened will automatically be populated in the “Add this website to the zone:” section. If this is not the ForwardHealth website, enter www.forwardhealth.wi.gov in the field instead.

6. Click Add. The ForwardHealth web address will be alphabetically added to the “Websites:” section.

![Trusted Sites Window with Added Website](image)

**Figure 132** Trusted Sites Window with Added Website

7. Click Close.

8. Click OK to close the Internet Options window and to apply the selected settings.

### 12.3 Change Security Level

1. Click Tools on the internet browser’s menu bar.

2. Select Internet Options from the drop-down menu. The Internet Options window will be displayed.

3. Click the Security tab at the top of the window.
4. Under the “Select a zone to view or change security settings” section, click **Trusted sites**.

5. Click **Default level**.

![Internet Options Window](image)

**Figure 133 Internet Options Window**

The “Security level for this zone” section will change to the default level.

6. Move the security level slider to **Medium-low**.

![Security Level for This Zone Section](image)

**Figure 134 Security Level for This Zone Section**

7. Click **OK** to close the Internet Options window and to apply the selected settings.