Children’s Long-Term Support Waiver Program
Eligibility and Enrollment

March 14, 2019
# Table of Contents

1 Getting Started ................................................................................................................................... 1
  1.1 New Waiver Agencies .................................................................................................................. 1
  1.2 Using Previous Portal Accounts .................................................................................................. 1
  1.3 Help Desk Information ................................................................................................................. 1

2 Accessing the Secure Waiver Agency Page ...................................................................................... 2
  2.1 User Guides .................................................................................................................................. 5

3 Switch Organization ........................................................................................................................... 6
  3.1 Switch to Organization ................................................................................................................ 6
  3.2 Set As Default Login Organization ............................................................................................... 8

4 Waiver Enrollment Wizard .............................................................................................................. 10

5 Adding a Member to a Waiver Program ............................................................................................ 14

6 Updating a Member’s Enrollment ................................................................................................... 22

7 Ending a Member’s Enrollment ....................................................................................................... 30

8 Suspending a Member’s Enrollment ............................................................................................... 33

9 Inactivating a Member’s Enrollment ............................................................................................... 39

10 Member Enrollment Search — Read Only .................................................................................... 42

11 Reporting ........................................................................................................................................ 44
  11.1 OnBase Reports ....................................................................................................................... 44
  11.2 Business Objects Web Intelligence Reports ........................................................................... 47
    11.2.1 Public Reports .................................................................................................................... 53
    11.2.2 Public Report Templates ................................................................................................... 55
      Refreshing Reports and Templates ............................................................................................... 57
      Exporting Reports and Templates ............................................................................................... 57

12 Letters ........................................................................................................................................... 59
<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.1</td>
<td>Waiver Letters</td>
<td>59</td>
</tr>
<tr>
<td>13</td>
<td>DSS Universe Management</td>
<td>61</td>
</tr>
<tr>
<td>13.1</td>
<td>Adding Universe Access</td>
<td>65</td>
</tr>
<tr>
<td>13.2</td>
<td>Deleting Universe Access</td>
<td>68</td>
</tr>
<tr>
<td>14</td>
<td>Appendix A: Glossary</td>
<td>69</td>
</tr>
<tr>
<td>15</td>
<td>Appendix B: User Security Roles</td>
<td>71</td>
</tr>
<tr>
<td>16</td>
<td>Appendix C: Start and Stop Reasons and Notifications</td>
<td>73</td>
</tr>
</tbody>
</table>
1 Getting Started

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

The Portal allows authorized Children’s Long-Term Support (CLTS) users to conduct business through a secure entry point 24 hours a day, seven days a week.

1.1 New Waiver Agencies

When a waiver agency requests an administrative Portal account for the first time, an agency representative will contact the Wisconsin Division of Medicaid Services, who will create the user in the system. Once the new user is created, a PIN letter will be sent to the waiver agency to grant access to the user.

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-healthcare provider’s Medicaid Provider ID or Waiver Agency ID. For security purposes, the Login ID contains only digits 3–6 of the NPI or Provider ID.

With the PIN letter, the waiver agency user can begin setting up their account and using the Portal. This includes creating other users for the waiver agency. For detailed instructions, refer to the ForwardHealth Provider Portal Account User Guide.

1.2 Using Previous Portal Accounts

Accounts created for users prior to October 1, 2017, will not be granted the functionality presented in this user guide. However, these accounts will retain functionality granted previously and can still be used to perform those functions.

1.3 Help Desk Information

Users who encounter any issues with Portal functionality, including the Waiver Enrollment Wizard, should contact the Portal Help Desk at 866-908-1363.

Users who encounter any issues with Functional Screen Information Access (FSIA) or Master Client Index (MCI) should contact the Department of Health Services SOS Help Desk at 608-266-9198 or dhssoshelp@dhs.wisconsin.gov.
2 Accessing the Secure Waiver Agency Page

The waiver enrollment wizard on the Portal allows authorized CLTS users to access member information and enroll members in waiver programs that require Medicaid and functional eligibility. To access the waiver enrollment wizard on the Portal, complete the following steps:


![ForwardHealth Portal Page](image-url)
2. Click **Login**. The ForwardHealth Portal Login box will be displayed.

![ForwardHealth Portal Login](image)

**Figure 2** ForwardHealth Portal Login

3. Enter the user’s username.

4. Enter the user’s password.

   **Note:** Ensure that the login information is for the correct waiver agency. Many settings within the Waiver Enrollment Wizard are determined by the waiver agency for which the user has logged in.
5. Click **Go!** The secure Waiver Agency page will be displayed.

![Secure Waiver Agency Page](image)

*Figure 3 Secure Waiver Agency Page*
2.1 User Guides

A user can view all CLTS-specific user guides to which the user has access by clicking the User Guides tab on the secure Waiver Agency page.

![Secure Waiver Agency Page](image)

Figure 4 Secure Waiver Agency Page

Other user guides, such as the ForwardHealth Provider Portal Account User Guide, may be accessed on the Portal User Guides page of the Provider section of the public Portal.
3 Switch Organization

The Switch Organization function allows users to do the following:

- Administrative and clerk administrative users 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.
- All users may change their default login organization.

3.1 Switch to Organization

1. On the Secure Waiver Agency page, click **Switch Organization**. The Switch Organization panel will be displayed.

![Switch Organization Panel](image)

Fields on the Switch Organization panel represent different pieces of information for waiver agencies. The fields and their corresponding information include:

- Current Provider — This field will show the ID of the waiver agency in which the user is actively logged.
- NPI — This field will always be blank.
• Address, City, State, ZIP — These fields will show the waiver agency’s address, city, state, and ZIP code.
• Provider ID — The field will show the Waiver Agency ID.
• Taxonomy – This field will be blank.
• Provider Type — This field will indicate “Waiver Agency.”
• Default Provider ID checkbox — This box will be checked for the Waiver Agency ID, which the user will automatically log in as when logging in to the Portal.
• Payer — This field will be blank.

The Waiver Agency ID (displayed as 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 the Waiver Agency ID.

1. To switch organizations, click 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 6 Switch Organization Page with Auto-Populated Information
2. If the user wishes to switch to the selected organization’s account, click **Switch To**. A dialog box will appear to confirm the selection.

![Dialog Box](image1)

**Figure 7** Dialog Box

3. Click **OK**. The user will be returned to the secure Waiver Agency page. The Provider ID to which the user switched will be displayed at the top of the page.

### 3.2 Set As Default Login Organization

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

![Switch Organization Page](image2)

**Figure 8** Switch Organization Page with Auto-Populated Information
2. Click **Set As Default**. The Switch Organization page will refresh and checkmarks will be displayed in the Default Provider ID boxes for the selected organization.

![Switch Organization Page](image)

**Figure 9** Switch Organization Page

Each time the user logs in to their account, the user’s organization will default to the Waiver Agency ID selected. A user must switch organizations after logging in to access any of their other accounts.
4 Waiver Enrollment Wizard

1. On the secure Waiver Agency page, click Waiver Enrollment Wizard.

Figure 10 Secure Waiver Agency Page
The Member Search panel will be displayed.

![Member Search Panel](image)

**Figure 11** Member Search Panel

2. Enter the member’s information into the fields and click **Search**. In order to search, users must enter at least one of the following sets of information into the appropriate fields:

- The member’s ForwardHealth Member ID
  
  *Note:* The ForwardHealth Member ID is sometimes referred to as Medicaid ID or MC ID.

- The member’s Social Security number (SSN) and date of birth (DOB)

- The member’s first and last names and DOB
  
  *Note:* The Waiver Enrollment Wizard requires a one-to-one match with a member. If more than one result is returned, a warning message will be displayed above the panel instructing the user to enter more information to narrow the results.

*Note:* Clicking **Exit** will end the session and return the user to the secure Waiver Agency page. None of the information will be saved, and the enrollment for the member will not be added or modified.
Once a one-to-one match has been found, the “Search Results” section will be displayed.

![Member Search Panel with “Search Results” Section](image)

Figure 12 Member Search Panel with “Search Results” Section

If a one-to-one match cannot be found, an error message will be displayed in the Member Search panel. The member cannot be enrolled until the member’s information can be found in interChange.
3. Click **Next**. The Waiver Enrollment Options panel will be displayed.

![Waiver Enrollment Options Panel](image)

**Figure 13** Waiver Enrollment Options Panel

The Waiver Enrollment Options panel includes the following options:

- **Add New Waiver Enrollment** allows the user to enroll the member in a waiver program.
  
  For instructions on adding a waiver enrollment, proceed to [Chapter 5](#).

- **Update/End Waiver Enrollment** allows the user to modify or end a member’s enrollment. This option will be grayed out if the member does not have either an active or suspended waiver enrollment record.
  
  For instructions on updating an enrollment record, proceed to [Chapter 6](#).
  
  For instructions on ending an enrollment record, proceed to [Chapter 7](#).

- **Suspend Waiver Enrollment** allows the user to suspend a member’s enrollment in a waiver program. Suspension of a member’s waiver enrollment record indicates that the member is currently ineligible for full enrollment. This option will be grayed out if the member does not have an active waiver enrollment record.
  
  For instructions on suspending an enrollment record, proceed to [Chapter 8](#).

- **Inactivate Waiver Enrollment** allows the user to permanently inactivate an enrollment record in order to remove a record created in error. Inactivating a record permanently removes it from future editing and reactivation, and it cannot be recovered. This option will be grayed out if the member does not have either an active or suspended waiver enrollment record.
  
  For instructions on inactivating an enrollment record, proceed to [Chapter 9](#).
5 Adding a Member to a Waiver Program

The Add New Waiver Enrollment option allows a user to enroll the member in the waiver program. It can also be used to re-enroll a member whose enrollment was ended or suspended.

1. On the Waiver Enrollment Options panel, select Add New Waiver Enrollment.

![Figure 14 Waiver Enrollment Options Panel](image)

2. Click Next. The Waiver Enrollment panel will be displayed.

![Figure 15 Waiver Enrollment Panel](image)

Some fields in the Waiver Enrollment panel will be grayed out and prepopulated with the member’s information from their Medicaid record.

3. The Waiver Enrollment panel includes the following editable fields:

   - The **County of Responsibility** field indicates the county through which the member receives support and service coordination benefits under the waiver program.

     Select the county appropriate for the waiver agency of the program from the drop-down menu. There may be only one option.
Note: The County of Residence field will not be editable but will display the member’s current county of residence. This field is independent of what county is selected as the county of responsibility.

- The Start Reason and Stop Reason fields indicate the reasons why the member was enrolled and, if applicable, why the enrollment was ended.

Select a start reason from the drop-down menu.

If the waiver enrollment is active and an open-ended date (12/31/2299) is indicated in the End Date field, leave the Stop Reason field blank.

If the waiver enrollment being recorded is historical, select a stop reason from the drop-down menu.

For more information on start and stop reasons, refer to Appendix C: Start and Stop Reasons and Notifications.

- The Effective Date field displays the requested date on which the member will first be able to receive benefits under the waiver program.

Enter a date in MM/DD/CCYY format in the field.

- The End Date field displays the last date on which the member will be able to receive benefits under the waiver program.

This field defaults to an open-ended date (12/31/2299) for active enrollments. If an end date is identified, enter that date instead in MM/DD/CCYY format.

4. Click Next. The Children’s Functional Level of Care panel will be displayed.

![Image of Children’s Functional Level of Care Panel]

**Figure 16** Children’s Functional Level of Care Panel
The Children’s Functional Level of Care panel is read-only and includes the following fields:

- Fields in the *Eligibility* column display a code that indicates whether the member is functionally eligible for the designated program. Codes are:
  - *ELG* — The member is eligible for the program.
  - *IAG* — The member is ineligible due to age.
  - *IEL* — The member is ineligible for the program.
  - *ILA* — The member is ineligible due to living situation.

  *Note*: Eligibility does not indicate whether or not the member is also enrolled in any given program.

- Fields in the *Target Group Information* column display codes that indicate the different target groups returned from the functional screen. The only programs that will display target group information are: Children’s Long-Term Support Waiver Program and Katie Beckett Medicaid.

- The *Effective Date* and *End Date* fields individually display the relevant dates for any programs for which the member is, or is not, functionally eligible. The End Date field is automatically calculated as the last day of the month 12 months after the effective date of the level of care (LOC).

5. Review the information and click **Next**.

   If the member is eligible for immediate enrollment in the waiver program with the effective date entered in the Waiver Enrollment panel, the Recertification Due Date panel will be displayed. Proceed to step 9.

6. If the member is **not** eligible for immediate enrollment with the effective date provided in the Waiver Enrollment panel, the Enrollment Determination Options panel will be displayed.

![Figure 17 Enrollment Determination Options Panel](image-url)
The requested effective date and earliest calculated effective date will be displayed in the fields based on information entered in previous panels.

7. Select one of the following options:
   - *Accept the Calculated Effective Date and enroll* – The effective date entered for the member will be replaced with the calculated effective date, and the member will be enrolled upon successful submission of the record.
   - *Cancel Enrollment* – The record will be canceled and the user will be returned to the secure Waiver Agency page.

*Note:* The *Pend entire record* and *Pend and Enroll* options are not currently available and will be grayed out.

8. Once an option has been selected, click **Next**.

9. If the user selects *Accept the Calculated Effective Date and enroll*, the Recertification Due Date panel will be displayed.

![Recertification Due Date Panel](image)

**Figure 18** Recertification Due Date Panel

The Recertification Due Date field is prepopulated with a date based on the recertification period for the waiver program in which the member will be enrolled. This is based on the enrollment effective date, not the LOC effective date.

*Note:* A date within the same calendar month as the requested effective date will not be accepted. The first of the following month is the first date that can be assigned as a recertification date.
10. Verify the recertification due date or enter a new date. Click **Next**. The Parental Payment Liability Fee panel will be displayed.

![Parental Payment Liability Fee Panel](image)

**Figure 19** Parental Payment Liability Fee Panel

The “Monthly Parental Fees History” section displays information on parental fee information pertinent to the member’s enrollment record. When adding a waiver enrollment record, this section will be blank.

- The *Waiver Program* column displays the program in which the member is being enrolled.
- The *Waiver Agency* column displays the waiver agency responsible for the member’s waiver enrollment.
- The *Monthly Parental Fee* column displays the monthly fee amount for each period of the member’s waiver enrollment record.
- The *Effective Date* and *End Date* columns display the dates on which the parental fee begins and ends.

11. The “Monthly Parental Fees” section allows the user to enter parental fee information for a member within the current waiver enrollment period.

To add parental fee information to the enrollment record, perform the following steps:

- Enter the dollar amount in the Monthly Parental Fee field.
  
  *Note:* It is acceptable to enter $0 in this field.

- Enter the segment’s effective and end dates in the Effective Date and End Date fields. Dates for the parental fee information must completely encompass the length of the enrollment from effective date to end date. If the enrollment is open-ended, the parental fee segments must span to an end date of 12/31/2299. Multiple segments may be used to do this, but these segments cannot overlap, and there can be no gaps between them.

- Click **Add**. The panel will refresh.
• Continue adding segments until the entirety of the waiver enrollment period is encompassed by the segments’ dates. If only one segment is necessary, ensure that its dates match the effective and end dates of the waiver enrollment period.

12. Review the information and click **Next**. The Individual Service Plan panel will be displayed.

![Individual Service Plan Panel](image)

**Figure 20** Individual Service Plan Panel

The “Individual Service Plan History” section displays individual service plan (ISP) information pertinent to the member’s enrollment record. When adding a waiver enrollment record, this section will be blank.

• The **Waiver Program** column displays the program in which the member is being enrolled.

• The **Waiver Agency** column displays the waiver agency responsible for the member’s enrollment.

• The **Individual Service Plan Completion Date** column displays the date the ISP was completed.

• The **Individual Service Plan Type** column displays the type of ISP the member has under that waiver program. Types include Initial, Recertification, and Update.

13. To add a new ISP record, perform the following steps:

   a. Enter the date the ISP was completed into the designated field. Future dates cannot be entered, and records cannot have overlapping dates.

   b. Select the ISP type from the drop-down menu.

   c. Click **Add**. The panel will refresh.

      Continue adding records until all completed ISPs have been recorded.
Note: If no ISPs have been completed, continue without adding information. The record can be updated later once an ISP has been completed.

14. Click **Next**. The Waiver Enrollment Summary panel will be displayed.

![Figure 21 Waiver Enrollment Summary Panel](image)

All fields on the Waiver Enrollment Summary panel will be prepopulated with the most current information collected on previous panels. This panel is read-only. Only fields pertinent to the member’s waiver enrollment record will be displayed. Review the information in these fields.

15. If the information is correct, click **Submit**.

If any information needs to be corrected, click **Previous** until the appropriate panel for the information is displayed. Edit the information and click **Next** until the Waiver Enrollment Summary panel is displayed again. Verify that the information is now correct. Click **Submit**.

Note: Clicking **Exit** will end the session and return the user to the secure Waiver Agency page. None of the information will be saved, and the enrollment for the member will not be added.

Note: If another clerk or administrator has made changes to the member’s enrollment while the user was working, an error message may be displayed. The user will be prompted to return to the Member Search panel.
The Confirmation panel will be displayed.

![Confirmation Panel](image)

**Figure 22** Confirmation Panel

16. Click **Return to Member Search** to return to the Member Search panel to begin any other enrollment tasks.

17. Click **Exit** to return to the secure Waiver Agency page.
6 Updating a Member’s Enrollment

The Update/End Waiver Enrollment option allows a user to edit a member’s active or suspended waiver enrollment records, revise end dates and stop reasons, recertify a member and set a new recertification due date, and add new information to an existing record.

Note: Users cannot edit the effective date for an enrollment. If an effective date needs to be changed, a user must inactivate the record if the incorrect effective date was recorded in error, or end the current enrollment and add a new waiver enrollment record that covers the desired enrollment period.

1. On the Waiver Enrollment Options panel, select Update/End Waiver Enrollment.

   ![Figure 23 Waiver Enrollment Options Panel]

   Note: Update/End Waiver Enrollment will be grayed out and may not be selected if the member does not have either an active or suspended waiver record.

2. Click Next. The Member Information/Waiver History panel will be displayed.

   ![Figure 24 Member Information/Waiver History Panel]
3. Select the waiver enrollment record to be modified. The Waiver Enrollment panel will be displayed.

![Waiver Enrollment Panel](image)

**Figure 25** Waiver Enrollment Panel

Most fields on the Waiver Enrollment panel will be grayed out and prepopulated with the member’s information.

The fields that may be edited include the following:

- The *County of Responsibility* field indicates the county through which the member receives support and service coordination benefits under the waiver program.

- The *Stop Reason* field indicates the reason why waiver enrollment was ended. This field is required only if a value has been entered in the End Date field.

  For more information on stop reasons, refer to [Appendix C: Start and Stop Reasons and Notifications](#).

- The *End Date* field displays the last date on which the member will be able to receive benefits under the waiver program. This field defaults to an open-ended date. If an end date is identified, enter that date instead.

- The *Recertification Completion Date* field indicates the most recent date on which the member completed recertification for waiver enrollment. If a new date is entered, the panel will refresh, and the *Recertification Due Date* field will display a recalculated date based on the newly entered completion date.
Note: The Suspension Effective Date field, Suspension End Date field, and Suspend Enrollment Record checkbox will display only when modifying a suspended record. For a suspended record, only the Stop Reason and Suspension End Date fields may be edited.

![Waiver Enrollment Panel for Suspended Record](image)

**Figure 26** Waiver Enrollment Panel for Suspended Record

4. Use the drop-down menus to select the required information or enter it into the appropriate fields.

5. When all modifications have been completed, click **Next**. The Children’s Functional Level of Care panel will be displayed.

![Children’s Functional Level of Care Panel](image)

**Figure 27** Children’s Functional Level of Care Panel

The Children’s Functional Level of Care panel is read-only and includes the following fields:

- Fields in the **Eligibility** column display a code that indicates whether the member is functionally eligible for the designated program. Codes include:
  - **ELG** — The member is eligible for the program.
  - **IAG** — The member is ineligible due to age.
• IEL — The member is ineligible for the program.

• Fields in the Target Group Information column display codes that indicate the different target groups returned from the functional screen. The only programs that will display target group information are: Children’s Long-Term Support Waiver Program and Katie Beckett Medicaid.

• The Effective Date and End Date fields individually display the relevant dates for any programs for which the member is, or has been, functionally eligible. The End Date field is automatically calculated based on the effective date of the LOC.

6. Review the information and click Next. The Recertification Due Date panel will be displayed.

![Image of Recertification Due Date Panel]

Figure 28 Recertification Due Date Panel

The Recertification Due Date field is prepopulated with a date based on the recertification period for the waiver program in which the member will be enrolled.

*Note:* A date within the same calendar month as the requested effective date will not be accepted. The first of the following month is the first date that can be assigned as a recertification date.

7. Verify the recertification due date or enter a new date. Click Next. The Parental Payment Liability Fee panel will be displayed.

![Image of Parental Payment Liability Fee Panel]

Figure 29 Parental Payment Liability Fee Panel
The “Monthly Parental Fees History” section displays information about parental fees pertinent to the member’s enrollment record.

- The Waiver Program column displays the program in which the member has been enrolled.
- The Waiver Agency column displays the waiver agency responsible for the member’s waiver enrollment.
- The Monthly Parental Fee column displays the amount of the parental fee for each period of the member’s waiver enrollment record.
- The Effective Date and End Date columns display the dates on which the parental fee began and ended.

8. The “Monthly Parental Fees” section allows the user to enter parental fee information for a member within the waiver enrollment period.

To add parental fee information to the enrollment record, perform the following steps:

- Enter the dollar amount in the Monthly Parental Fee field.
  
  *Note:* It is acceptable to enter $0 in this field.

- Enter the parental fee segment’s effective and end dates in the Effective Date and End Date fields. Dates for the parental fee information must completely encompass the length of the enrollment from effective date to end date. Multiple segments may be used to do this, but these segments cannot overlap, and there can be no gaps between them.

- Click Add. The panel will refresh.

- Continue adding or modifying segments until the entirety of the waiver enrollment period is encompassed by the segments’ dates. If only one segment is necessary, ensure that its dates match the effective and end dates of the waiver enrollment period.

9. To modify an existing parental fee segment, perform the following steps:

- Select the record to be modified from the list in the “Monthly Parental Fees History” section. The Monthly Parental Fee and Effective Date fields will be grayed out.

- Edit the date in the End Date field.

- Click Save. The panel will refresh.

- Continue adding or modifying segments until the entirety of the waiver enrollment period is encompassed by the segments’ dates. If only one segment is necessary, ensure that its dates encompass the effective and end dates of the waiver enrollment period.
10. Review the information and click **Next**. The Individual Service Plan panel will be displayed.

![Individual Service Plan Panel](image)

**Figure 30** Individual Service Plan Panel

The “Individual Service Plan History” section displays ISP information pertinent to the member’s enrollment record:

- The **Waiver Program** column displays the program in which the member has been enrolled.
- The **Waiver Agency** column displays the waiver agency responsible for the member’s enrollment.
- The **Individual Service Plan Completion Date** column displays the date on which the ISP was completed.
- The **Individual Service Plan Type** column displays the type of ISP the member has under that waiver program. Types include Initial, Recertification, and Update.

11. To add a new ISP record, perform the following steps:

   a. Enter the date the ISP was completed into the designated field. Future dates cannot be entered, and records cannot have overlapping dates.
   
   b. Select the ISP type from the drop-down menu.
   
   c. Click **Add**. The panel will refresh.

   Continue adding records until all completed ISPs have been recorded.

*Note:* If no ISPs have been completed, continue without adding information. The record can later be updated once an ISP has been completed.
12. To modify an existing ISP record, perform the following steps:

   a. Select the record to be modified from the list in the “Individual Service Plan History” section. The Individual Service Plan Type field will be grayed out.

   b. Edit the date in the Individual Service Plan Completion Date field.

   c. Click **Save**. The panel will refresh.

      Continue adding or modifying records until all completed ISPs have been recorded.

13. Click **Next**. The Waiver Enrollment Summary panel will be displayed.

![Waiver Enrollment Summary Panel](image)

**Figure 31** Waiver Enrollment Summary Panel

All fields on the Waiver Enrollment Summary panel will be prepopulated with the information collected on previous panels. This panel is read-only. Only fields pertinent to the member’s waiver enrollment record will be displayed. Review the information in these fields.

14. If the information is correct, click **Submit**.

   If any information needs to be corrected, click **Previous** until the appropriate panel for the information is displayed. Edit the information and click **Next** until the Waiver Enrollment Summary panel is displayed again. Verify that the information is now correct. Click **Submit**.

   **Note:** Clicking **Exit** will end the session and return the user to the secure Waiver Agency page. None of the new information will be saved, and the enrollment for the member will not be updated.

   **Note:** If another clerk or administrator has made changes to the member’s enrollment while the user was working, an error message may be displayed. The user will be prompted to return to the Member Search panel.
The Confirmation panel will be displayed.

![Confirmation Panel](image)

**Figure 32** Confirmation Panel

15. Click **Return to Member Search** to return to the Member Search panel to begin any other enrollment tasks.

   Click **Exit** to return to the secure Waiver Agency page.
7 Ending a Member’s Enrollment

The Update/End Waiver Enrollment option also allows a user to disenroll a member from a waiver program. Any additional information that needs to be modified or corrected within the record can be edited while ending the enrollment. Refer to Chapter 6 Updating a Member’s Enrollment for instructions.

1. On the Waiver Enrollment Options panel, select **Update/End Waiver Enrollment**.

![Figure 33 Waiver Enrollment Options Panel](image)

*Note:* Update/End Waiver Enrollment will be grayed out if the member does not have either an active or suspended waiver record.

2. Click **Next**. The Member Information/Waiver History panel will be displayed.

![Figure 34 Member Information/Waiver History Panel](image)

*Note:* If the member has only one waiver enrollment record, the Member Information panel will be skipped and the Waiver Enrollment panel will be displayed.
3. Select the waiver enrollment record to be ended. The Waiver Enrollment Panel will be displayed.

![Waiver Enrollment Panel](image)

**Figure 35** Waiver Enrollment Panel

Most fields on the Waiver Enrollment panel will be grayed out and prepopulated with the member’s enrollment information.

4. Select a stop reason from the drop-down menu.

For more information on start and stop reasons, refer to Appendix C: Start and Stop Reasons and Notifications.

5. Enter the last date of the member’s enrollment in the End Date field.

6. Click **Next**. Continue through the panels by clicking **Next** and updating any necessary information until the Waiver Enrollment Summary panel is displayed.

![Waiver Enrollment Summary Panel](image)

**Figure 36** Waiver Enrollment Summary Panel

All fields on the Waiver Enrollment Summary panel will be prepopulated with the information collected on previous panels. This panel is read-only. Only fields pertinent to the member’s waiver enrollment record will be displayed. Review the information in these fields.
7. If the information is correct, click **Submit**.

   If any information needs to be adjusted, click **Previous** until the appropriate panel for the information is displayed. Edit the information and click **Next** until the Waiver Enrollment Summary panel is displayed again. Verify that the information is now correct. Click **Submit**.

   **Note:** Clicking **Exit** will end the session and return the user to the Member Search panel. None of the new information will be saved, and the enrollment for the member will not be ended.

   **Note:** If another clerk or administrator has made changes to the member’s enrollment while the user was working, an error message may be displayed. The user will be prompted to return to the Member Search panel.

   The Confirmation panel will be displayed.

   ![Figure 37 Confirmation Panel](image)

8. Click **Return to Member Search** to return to the Member Search panel to begin any other enrollment tasks.

9. Click **Exit** to return to the secure Waiver Agency page.
8 Suspending a Member’s Enrollment

The Suspend Waiver Enrollment option allows a user to suspend a member’s enrollment record. Suspension of a member’s waiver enrollment record indicates that the member is currently ineligible for full enrollment. Some agencies may still provide limited services during a suspension period.

Note: Successfully submitting the suspension record will automatically end-date the active enrollment. The suspension of a waiver enrollment record cannot be reversed. To re-enroll the member, a new waiver enrollment record must be created. Refer to Chapter 5 Adding a Member to a Waiver Program for instructions.

1. On the Waiver Enrollment Options panel, select Suspend Waiver Enrollment.

![Figure 38 Waiver Enrollment Options Panel](image)

Note: Suspend Waiver Enrollment will be grayed out if the member does not have an active waiver record.

2. Click Next. The Member Information/Waiver History panel will be displayed.

![Figure 39 Member Information/Waiver History Panel](image)

Note: If the member has only one waiver enrollment record, the Member Information panel will be skipped and the Waiver Enrollment panel will be displayed.
3. Select the waiver enrollment record to be suspended. The Waiver Enrollment panel will be displayed.

![Waiver Enrollment Panel](Figure 40)

Most fields on the Waiver Enrollment panel will be grayed out and prepopulated with the member’s enrollment information. The Stop Reason field will default to “Suspended.”

4. Check the Suspend Enrollment Record box. The panel will be refreshed and the following fields will be editable:

   - Suspension Effective Date
   - Suspension End Date

5. Enter the first date for which the suspension is effective in the Suspension Effective Date field.

6. Enter the date on which the member’s suspension will end in the Suspension End Date field.

   Note: If the member will be re-enrolled at the end of the suspension, a new enrollment must be added with an effective date after the suspension end date. If a new enrollment is not added, the member will be disenrolled after the suspension end date. For instructions on adding a waiver enrollment, proceed to Chapter 5.

7. The Stop Reason field will default to a stop reason of “Suspended.” Verify that this is the correct stop reason. If not, select a different stop reason from the Stop Reason drop-down list.

   Note: Changing the stop reason may result in a notification being generated and sent to the member. Refer to Appendix C for more information on stop reasons and notifications.
8. Verify the recertification due date or enter a new date. Click Next. The Parental Payment Liability Fee panel will be displayed.

![Parental Payment Liability Fee Panel]

**Figure 41** Parental Payment Liability Fee Panel

The “Monthly Parental Fees History” section displays information on parental fee information pertinent to the member’s enrollment record:

- The **Waiver Program** column displays the program in which the member has been enrolled.
- The **Waiver Agency** column displays the waiver agency responsible for the member’s waiver enrollment.
- The **Monthly Parental Fee** column displays the amount of the parental fee for each period of the member’s waiver enrollment record.
- The **Effective Date** and **End Date** columns display the dates on which the parental fee period began and ended.

9. The “Monthly Parental Fees” section allows the user to enter parental fee information for a member within the waiver enrollment period.

To add parental fee information to the enrollment record, perform the following steps:

- Enter the dollar amount in the Monthly Parental Fee field.
  
  *Note:* It is acceptable to enter $0 in this field.

- Enter the parental fee segment’s effective and end dates in the Effective Date and End Date fields. Dates for the parental fee information must completely encompass the length of the enrollment from suspension effective date to suspension end date. Multiple segments may be used to do this, but these segments cannot overlap, and there can be no gaps between them.

- Click Add. The panel will refresh.
• Continue adding segments until the entirety of the waiver enrollment period is encompassed by the segments’ dates. If only one segment is necessary, ensure that its dates match the effective and end dates of the waiver enrollment period.

10. To modify an existing parental fee segment, perform the following steps:

• Select the record to be modified from the list in the “Monthly Parental Fees History” section. The Monthly Parental Fee and Effective Date fields will be grayed out.

• Edit the date in the End Date field.

• Click **Save**. The panel will refresh.

• Continue adding or modifying segments until the entirety of the waiver enrollment period is encompassed by the segments’ dates. If only one segment is necessary, ensure that its dates encompass the effective and end dates of the waiver enrollment period.

11. Review the information and click **Next**. The Individual Service Plan panel will be displayed.

![Figure 42 Individual Service Plan Panel](image)

The “Individual Service Plan History” section displays ISP information pertinent to the member’s enrollment record.

• The **Waiver Program** column displays the program in which the member has been enrolled.

• The **Waiver Agency** column displays the waiver agency responsible for the member’s enrollment.

• The **Individual Service Plan Completion Date** column displays the date on which the ISP was completed.
• The *Individual Service Plan Type* column displays the type of ISP the member has under that waiver program. Types include Initial, Recertification, and Update.

12. To add a new ISP record, perform the following steps:
   a. Enter the date the ISP was completed into the designated field. Future dates cannot be entered, and records cannot have overlapping dates.
   b. Select the ISP type from the drop-down menu.
   c. Click **Add**. The panel will refresh.

   Continue adding records until all completed ISPs have been recorded.

   *Note:* If no ISPs have been completed, continue without adding information. The record can later be updated once an ISP has been completed.

13. To modify an existing ISP record, perform the following steps:
   a. Select the record to be modified from the list in the “Individual Service Plan History” section. The Individual Service Plan Type field will be grayed out.
   b. Edit the date in the Individual Service Plan Completion Date field.
   c. Click **Save**. The panel will refresh.

   Continue adding or modifying records until all completed ISPs have been recorded.

14. Click **Next**. The Waiver Enrollment Summary panel will be displayed.

![Waiver Enrollment Summary Panel](image)

*Figure 43* Waiver Enrollment Summary Panel

All fields on the Waiver Enrollment Summary panel will be prepopulated with the information previously collected. This panel is read-only. Only fields pertinent to the member’s waiver enrollment record will be displayed. Review the information in these fields.

15. If the information is correct, click **Submit**.
If any suspension information needs to be adjusted, click Previous. Edit the information and click Next until the Waiver Enrollment Summary panel is displayed again. Verify that the information is now correct. Click Submit.

Note: Clicking Exit will end the session and return the user to the Member Search panel. None of the new information will be saved, and the enrollment for the member will not be suspended.

Note: If another clerk or administrator has made changes to the member’s enrollment while the user was working, an error message may be displayed. The user will be prompted to return to the Member Search panel.

The Confirmation panel will be displayed.

![Confirmation Panel](image)

Figure 44 Confirmation Panel

16. Click Return to Member Search to return to the Member Search panel to begin any other enrollment tasks.

17. Click Exit to return to the secure Waiver Agency page.
9 Inactivating a Member’s Enrollment

The Inactivate Waiver Enrollment option allows a user to delete an enrollment record. The purpose of inactivating an enrollment record is to remove a record created in error. Inactivating a record permanently removes it from future editing and reactivation, and it cannot be recovered. If the enrollment needs to be end-dated, refer to the instructions in Chapter 7 Ending a Member’s Enrollment. If the enrollment needs to be suspended, refer to the instructions in Chapter 8 Suspending a Member’s Enrollment.

1. On the Waiver Enrollment Options panel, click **Inactivate Waiver Enrollment**.

   ![Waiver Enrollment Options Panel](image)

   **Figure 45** Waiver Enrollment Options Panel

   *Note:* Inactivate Waiver Enrollment will be grayed out if the member does not have either an active or suspended waiver record.

2. Click **Next**. The Member Information/Waiver History panel will be displayed.

   ![Member Information/Waiver History Panel](image)

   **Figure 46** Member Information/Waiver History Panel

   *Note:* If the member has only one waiver enrollment record, the Member Information panel will be skipped and the Waiver Enrollment panel will be displayed.
3. Select the waiver enrollment record to be inactivated. The Waiver Enrollment panel will be displayed. All fields will be grayed out except for the Inactivate Enrollment Record checkbox.

![Waiver Enrollment Panel](image)

**Figure 47** Waiver Enrollment Panel

4. Check the **Inactivate Enrollment Record** box. Click **Next**. A warning will be displayed.

5. Verify that this is the record that needs to be inactivated. If it is correct, click **Ignore** and then click **Continue**.

   *Note:* Inactivation is permanent. A record that has been inactivated cannot be recovered or edited.

   If it is not the correct record, click **Exit** to return to the secure Waiver Agency page.

6. Click **Submit**.

   *Note:* If another clerk or administrator has made changes to the member’s enrollment while the user was working, an error message may be displayed. The user will be prompted to return to the Member Search panel.

The Confirmation panel will be displayed.

![Confirmation Panel](image)

**Figure 48** Confirmation Panel

7. Click **Return to Member Search** to return to the Member Search panel to begin any other enrollment tasks.
8. Click **Exit** to return to the secure Waiver Agency page.
10 Member Enrollment Search — Read Only

Users who have access to the secure Waiver Agency page but do not have the ability to add or modify enrollment records may still search for and view a member’s enrollment record information.

1. On the secure Waiver Agency page, click **Waiver Member Search**. The Member Search panel will be displayed.

![Figure 49 Member Search Panel](image)

2. Enter the member’s information into the fields and click **Search**. In order to search, users must enter at least one of the following sets of information into the appropriate fields:

   - The member’s ForwardHealth Member ID
     
     *Note*: The ForwardHealth Member ID is sometimes referred to as Medicaid ID or MCI ID.

   - The member’s SSN and DOB

   - The member’s first and last names and DOB

   *Note*: The Member Search requires a one-to-one match with a member. If more than one result is returned, a message will be displayed above the panel instructing the user to enter more information to narrow the results.
Once a one-to-one match has been found, the “Search Results” section will be displayed.

3. Click **Exit** to return to the secure Waiver Agency page.
11 Reporting

Users with the necessary security roles can access OnBase and Business Objects Web Intelligence reports from the ForwardHealth Portal. Refer to Appendix B: User Security Roles for more information on the required user security roles and the types of reports available to them.

11.1 OnBase Reports


![Figure 51 Waiver Report Page](image)

The Waiver Report page contains links to the OnBase reports available according to the user’s role. These reports may include:

- Enrollment Change Report — This monthly report displays all enrollment changes for an agency within the previous month. This includes re-enrollment, suspension, disenrollment, and inactive segments. The report will run on the first day of the calendar month.
• Total Member List Report — This monthly report displays all members enrolled with an agency during the previous month. The report only includes members with active and/or suspended enrollment for the reporting month. The report will run on the first day of the calendar month.

• Disenrollment Report for Waiver Agencies — This monthly report displays members with an “Active” member ID who have an “Active” or “Suspended” waiver enrollment segment on file that has been disenrolled during the previous month. The report will run on the first day of the calendar month.

• Predictive Disenrollment Report — This monthly report displays members predicted to be disenrolled at the end of the current month and the end of the next calendar month. The report will run on the interChange Adverse Action date each month. The report identifies the predicted disenrollment date for each member due to the member aging out of the program, losing Medicaid eligibility, having an annual functional screen/level of care end date, losing function eligibility, or having a program recertification due date that falls within the reporting period.

• Link Report for Waiver Agencies — This monthly report displays members who have a current “Active” or “Suspended” waiver enrollment segment on file under the “Active” and/or “Inactive” member ID and were linked during the reporting period (previous calendar month). The report will run on the first day of the calendar month.
2. Click the report to be viewed. The OnBase document viewer will open and a file download window will be displayed.

![File Download Window]

3. Click Open. The report will be displayed in the OnBase document viewer.
11.2 Business Objects Web Intelligence Reports

1. From the secure Waiver Agency page, click Business Objects Webi. The Webi home page will be displayed.

   ![Webi Home Page](image)

   Figure 53 Webi Home Page

2. Review the Confidentiality Agreement.
3. Click **Business Objects (link to WEBI)**. The user will be directed to SAP BusinessObjects login page.

![Figure 54 SAP BusinessObjects Login Page](image)

---

**Figure 54** SAP BusinessObjects Login Page
4. Log in with the user’s SAP BusinessObjects ID and password. SAP BusinessObjects will be launched in the browser.

*Note:* The ID and password used to access Business Object reports is not the same as the ID and password used to access the ForwardHealth Portal.

*Figure 55* SAP BusinessObjects Home Tab
5. Click the **Documents** tab. The Documents page will be displayed.

![Figure 56 SAP BusinessObjects Documents Tab](image-url)
6. Click **Folders** in the lower left of the screen.

![Figure 57 SAP BusinessObjects Documents Tab with Arrow](image-url)
The Folders menu will be displayed.

Figure 58  SAP BusinessObjects Folders Menu
### 11.2.1 Public Reports

1. In the Folders menu, select **Public Folders**, then select **CLTS DW External CWA Reports**. A list of county-specific folders will be displayed. Users will only see the folders for their agency’s county. Select the appropriate county folder.

2. The following reports will be displayed for each county:

   - **CLTS Waiver Enrollment Report** — This report provides a printable, sortable, and filterable list of the agency’s enrolled members and can be used to track, verify, and audit enrollment. Users may find this report helpful in verifying addresses where letters will be sent and tracking sources of Medicaid eligibility and renewals.

   - **Link Report for Waiver Agencies** — This report identifies members with more than one ID whose records were linked during the previous calendar month. Users may find this report helpful in identifying members who have had a change in their MCI.

   - **Predictive Disenrollment Report** — This report displays members who are scheduled to be disenrolled at the end of the current month and the end of the next calendar month. Users may find this report helpful in planning for recertifications and transition planning.

   These reports are refreshed weekly, and instances of these reports can be saved as Excel files.

3. To view a report, double click the desired report. The report will open in the browser if it is a Web Intelligence or Desktop intelligence Report, or open in Excel if it is a Microsoft Excel file.
4. When a report is refreshed at the scheduled time, an instance is automatically saved as an Excel document. To save an instance of a report, select the desired instance and view it. If it is opened in Excel, it can be saved as any other Excel document. If it is opened in the browser, click the Export button.

*Figure 60* Export Button
The Export menu will be displayed.

Figure 61  SAP BusinessObjects Export Menu

In the Export menu, users can select whether to export the report or only its data and select the desired file type. Options include CSV, Excel, PDF, and TXT.

11.2.2 Public Report Templates

Report templates are available for users to create their own customized rescreening and recertification reports for their waiver agency.
1. From the Folders menu, select **Public Folders** then **CLTS DW External CWA Templates**.

![Figure 62: CLTS DW External CWA Templates Folder](image)

The following report templates have been made publicly available:

- **Re-Screen Eligibility and Enrollment Streamlining Report** — This report identifies members who are due or overdue for annual functional screens. Users may find this report helpful in verifying disenrollments and planning for rescreenings, transitions, and disenrollments.

- **Re-Certification Eligibility and Enrollment Streamlining Report** — This report identifies members who are due or overdue for annual waiver program recertifications. Users may find this report helpful in verifying disenrollments and their accuracy and planning for recertifications, transitions, and disenrollments.

2. To copy a template to the user’s inbox, select the desired file.
3. Select **Send** and then click **Bl Inbox**. The Send menu will be displayed.

![Figure 63 SAP BusinessObjects Send Menu](image)

4. Select **User List**.
5. Select the user’s name as a recipient from the user list and then click the button.
6. Click the **Copy** radio button in the Send As field.
7. Click **Send** to send the template.

**Refreshing Reports and Templates**

Refreshing a report or template runs the report with the most currently available data.

1. Right click on the desired report.
2. Select Organize > Modify > Refresh. The report will be refreshed with currently available data.

**Exporting Reports and Templates**

1. To export a template or generate a report from one of these templates, view the report and browser, and click the Export button.
2. The Export menu will be displayed.

![Export Menu](image)

Figure 65 Export Menu

3. In the Export menu, users can select whether to export the report or only its data and select the desired file type. Options include CSV, Excel, PDF, and TXT.
12 Letters

Users with the necessary security roles can view the letters that are generated by ForwardHealth and sent out to members on behalf of the users’ waiver agencies. Refer to Appendix B: User Security Roles for more information about the required user security roles.

Letters that are automatically generated are run in batches every Friday and mailed to users within two business days. Refer to Appendix C: Start and Stop Reasons for a list of which start and stop reasons generate letters automatically.

12.1 Waiver Letters


![Waiver Letter Page]

The Waiver Letter page contains links to copies of the letters that are generated for the user’s agency, viewable through OnBase. If a user works for multiple agencies, the user can view each agency’s letters by using the Switch Organization functionality. The letters available may include:

- Enrollment Letters — This link will show the enrollment confirmation letter sent on behalf of the user’s agency in the OnBase Viewer. Users can sort and review individual letters from the list available in OnBase.
• Disenrollment Letters — This link will show the disenrollment letters sent on behalf of the user’s agency in the OnBase Viewer. Users can sort and review individual letters from the list available in OnBase.
13 DSS Universe Management

Administrators with the necessary security roles can grant DSS Universe access to clerks in their waiver agency. This access allows users to create and view reports with data from that data collection or universe.

1. From the secure waiver agency page, click the **Account tab**.

![Figure 67 Secure Waiver Agency Page](image-url)
2. From the Account screen, click **DSS Universe Management**.

![Figure 68 Account Screen](image-url)
The Clerk Selection panel will be displayed.

![Clerk Selection Panel](image)

**Figure 69** Clerk Selection Panel

3. Enter the user name, first name, or last name of the clerk who requires DSS access.
4. Click the Search button. Search results will be populated below in the “Search Results” section.

![Clerk Selection Panel with Search Results](image)

**Figure 70** Clerk Selection Panel with Search Results
13.1 Adding Universe Access

1. Select the clerk who requires DSS access. The clerk’s information will be populated in the “Request User Profile” section.

2. Click the Next button. The DSS Management panel will be displayed.

![DSS Management Panel](image)

**Figure 71** DSS Management Panel
3. Select a universe from the Universe drop-down menu. The page will refresh, and the user’s selection will be shown in the “Please select one or more of the Universe Control Items below*” section.

![Figure 72 DSS Management Panel with Universe Selected](image)

If more than one universe is needed, select from the drop-down menu again.
4. Once all of the desired universes are shown in the “Please select one or more of the Universe Control Items below**” section, click their check boxes.

5. Click **Add**. The page will be refreshed, and the universe(s) will be listed in the “Universe Requested” section.

![DSS Management Panel](image)

**Figure 73** DSS Management Panel
13.2 Deleting Universe Access

1. In the DSS Management panel, select the universe to remove. A new section will be displayed.

![DSS Management Panel](image)

2. Select Request Removal status from the drop-down menu.

3. Click Save. A request for removal of the universe access from this clerk’s account will be sent to the DSS/LTC Helpdesk.
14 Appendix A: Glossary

**Benefit Plan:** Type of plan that designates the benefits covered and is based on the member’s medical status code. Members may be enrolled in multiple benefit plans concurrently. (For example: BadgerCare Plus and Medicaid, Wisconsin Women, Infants, and Children [WIC] program)

**Enrollment Effective Date:** The earliest possible date that a member can be enrolled in the waiver program. The effective date is the first date when the member meets all of the following criteria: Medicaid financial and non-financial eligibility requirements, the institutional LOC, has agreed to an ISP, and lives in an eligible setting.

**End Date:** The last date a member is enrolled in the waiver program. The end date closes an enrollment segment and is associated with a Stop Reason. The member may subsequently enroll in a new waiver segment.

**Health Insurance Claim Number:** A Medicare ID used for Medicare Buy-In purposes.

**Individual Service Plan Completion Date:** The date the support service coordinator and participant/family agree to services listed on the ISP. Signatures on the ISP are not required for the purposes of entering a date into this field. The ISP Completion Date indicates that all issues related to the child’s assessed needs, including health and safety risks, have been addressed on the ISP either through waiver-funded services or services funded through other sources.

**Level of Care Effective Date:** The date the member was determined to meet the LOC requirement for waiver program eligibility.

**Level of Care End Date:** The date by which LOC functional eligibility must be recertified for the member to maintain waiver program eligibility. The LOC End Date is auto-calculated based upon the LOC Effective Date; the end date is the end of month plus 12 months from the LOC Effective Date.

**Medicare ID:** Members are assigned an ID specific to Medicare enrollment. If members are enrolled in Medicare, their ID will be displayed. If they are not enrolled in Medicare, the field will be blank.

**Medicare Beneficiary ID:** The Member’s Medicare ID beginning in 2018.

**Member:** A member represents an individual enrolled in any of the ForwardHealth health care programs.

**Member ID:** All members are assigned an ID number. The number is assigned from the MCI and does not include the SSN. The MCI ID is an ID number used for all state government programs in which the member is enrolled.

**Parental Fees:** The monthly amount that has been calculated to be the family’s share of the cost of program services.
Recertification Completion Date: The earliest date that it has been redetermined that the
member meets all of the following criteria: Medicaid financial and non-financial eligibility
requirements, the institutional LOC, has agreed to an ISP, and lives in an eligible setting.

Recertification Due Date: The date by which eligibility must be redetermined in order for the
member to continue enrollment in the waiver program. This field can be changed to an earlier
date, but cannot be later than the last day of the month, 12 months after the enrollment
Effective Date or the previous Recertification Due Date.

Start Reason: This is the reason a member is being enrolled in a waiver program segment. Refer
to Appendix C: Start and Stop Reasons and Notifications for more information.

Stop Reason: This is the reason a member’s enrollment segment is ending. Refer to Appendix C:
Start and Stop Reasons and Notifications for more information.

Suspension Effective Date: This is the first full day that a member resides in an ineligible setting.

Suspension End Date: This is the last full day that a member resides in an ineligible setting.

WAIVER ENROLLMENT OPTIONS

Add New Waiver Enrollment: This option is used for initial enrollments and to re-enroll members
whose enrollment was suspended or ended.

Update Waiver Enrollment: This option is used to edit (i.e., add or change) information in an open
enrollment.

End Waiver Enrollment: This option is used to end (i.e., close or terminate) a member’s
enrollment. To re-enroll a member in the program, a new waiver enrollment is added.

Suspend Waiver Enrollment: This option is used when a member is not eligible for full enrollment
(e.g., due to a temporary stay in an ineligible setting). Ending a suspension does not re-enroll the
member in the waiver program by lifting the program suspension. A new waiver enrollment must
be added once the member becomes fully eligible.

Inactivate Waiver Enrollment: This option is only used to delete an enrollment record that was
entered in error. The record will be completely removed and cannot be recovered once it is
inactivated.
15 Appendix B: User Security Roles

**Waiver Agency Admin**: This role is assigned to a Waiver Program staff member via the Waiver Program and Program Profile setup process.

Upon successful Waiver Program and Program Profile setup, a PIN letter is generated and sent to the assigned Waiver Agency Admin. This security role will only become active when the assigned Waiver Agency Admin successfully completes the Portal registration after receipt of the PIN letter.

Only one Waiver Agency Admin security role will be active for each Waiver Agency at any time.

**Clerk Admin**: This role is created by the Waiver Agency Admin. The roles assigned to the Clerk Admin will be any allowable combination of the roles held by the Waiver Agency Admin.

The Clerk Admin has access to creating and maintaining all Clerk roles within their waiver agency, having access to assigning only their own roles, in any allowable combination, to a Clerk.

The Clerk Admin has access to the use and functionality of any roles assigned.

**Waiver Agency Info — Read Only**: This role allows the user to view Waiver Agency (as an agency) information, but shall not allow the user to edit any information. This role is abbreviated as **Waiver Info-RO** on the Portal.

**Waiver Agency Info and Cross-Reference — Read Only**: This role allows the user to view Waiver Agency (as an agency) and cross-reference information but does not allow the user to edit any information. This role is abbreviated as **Waiver Info/XREF-RO** on the Portal.

**interChange Member/Managed Care Info — Read Only**: This role allows the user to view exposed interChange Member information panels but does not allow the user to edit any information. This role is abbreviated as **iC Member/MC Info** on the Portal.

**interChange Waiver Member — Read Only**: This role allows the user to view exposed interChange Waiver Member information panels but does not allow the user to edit any information. This role is abbreviated as **iC Waiver Member-RO** on the Portal.

**interChange Third-Party Liability (TPL) — Read Only**: This role allows the user to view exposed interChange TPL information panels but does not allow the user to edit any information. This role is abbreviated as **iC TPL-Read Only** on the Portal.

**Waiver Enrollment Wizard — Update**: This role allows the user to utilize the Waiver Enrollment wizard, based on the rules defined in the Program Profile. This role is abbreviated as **Waiver Wizard-Update** on the Portal.

**Waiver Enrollment Wizard — Read Only**: This role allows the user to utilize the Member Search wizard to search interChange for Waiver enrollment records but does not allow the user to edit any information. This role is abbreviated as **Waiver Wizard-RO** on the Portal.
**Waiver Enrollment OnBase Reports:** This role allows the user to view waiver-specific OnBase reports. This role is abbreviated as **Waiver OnBase Rpts** on the Portal.

**Waiver Enrollment Webi Reports:** This role allows the user to view waiver-specific County Department of Social Services (DSS) reports by providing a Webi link. The functionality of this role is defined by DSS, including the ability to refresh specific reports or query unique data. This role is abbreviated as **Waiver Webi Rpts** on the Portal.

**Waiver Enrollment OnBase Letters:** This role allows the user to view agency-specific enrollment and disenrollment letters. This role is abbreviated as **Waiver OnBase LTRS** on the Portal.

**Wisconsin Provider Management (WPM) — Read Only:** This role allows the user to view exposed interChange Provider information panels but does not allow the user to edit any information. This role is abbreviated as **WPM-Read Only** on the Portal.

**Wisconsin Provider Management OnBase Reports:** This role allows the user to view WPM-specific OnBase reports. This role is abbreviated as **WPM OnBase Rpts** on the Portal.

**Wisconsin Provider Management Webi Reports:** This role allows the user to view WPM-specific Webi reports. This role is abbreviated as **WPM Webi Reports** on the Portal.
# 16 Appendix C: Start and Stop Reasons and Notifications

The information in this appendix relates to the start and stop reasons of a member’s enrollment. When an enrollment is added, updated, or ended for a member and a start or stop reason is selected or changed in the system, a letter will be sent to the member with information on their enrollment corresponding to the change. The table below lists the start and stop reasons and their associated letters.

<table>
<thead>
<tr>
<th>Reason Code</th>
<th>Reason Code Description</th>
<th>MGD Letter</th>
<th>Letter Description</th>
<th>Entry Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>23</td>
<td>Member has Aged Out of the Program</td>
<td>MGD-9720-R</td>
<td>CLTS Disenrollment Notice</td>
<td>End reason is set automatically based on the member turning 22. Notice is sent out 60 days in advance and again the month the member turns 22.</td>
</tr>
<tr>
<td>26</td>
<td>System Assigned — Waiver Reassignment</td>
<td>MGD-9710-R</td>
<td>CLTS Confirmation Notice</td>
<td>Start reason is set automatically when a member's enrollment is automatically resigned without a gap in coverage.</td>
</tr>
<tr>
<td>61</td>
<td>Reestablished Functional Eligibility</td>
<td>MGD-9710-R</td>
<td>CLTS Confirmation Notice</td>
<td>Start reason is set automatically when a member regains functional eligibility. Not currently in use.</td>
</tr>
<tr>
<td>62</td>
<td>Reestablished Financial Eligibility</td>
<td>MGD-9710-R</td>
<td>CLTS Confirmation Notice</td>
<td>Start reason is set automatically when a member regains financial eligibility. Not currently in use.</td>
</tr>
<tr>
<td>63</td>
<td>Disenroll — Missing Functional Eligibility</td>
<td>MGD-9720-R</td>
<td>CLTS Disenrollment Notice</td>
<td>End reason is set automatically when a member is missing functional eligibility. Not currently in use.</td>
</tr>
<tr>
<td>64</td>
<td>DOD (Date of Death)</td>
<td>NONE</td>
<td>NONE</td>
<td>End reason can be entered manually or is set automatically when a date of death is received. No notice is sent.</td>
</tr>
<tr>
<td>65</td>
<td>No Medicaid Eligibility</td>
<td>MGD-9720-R</td>
<td>CLTS Disenrollment Notice</td>
<td>End reason is currently manually entered. Notice is sent to the member with the next weekly letter generation batch.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>Reason Code Description</td>
<td>MGD Letter</td>
<td>Letter Description</td>
<td>Entry Method</td>
</tr>
<tr>
<td>-------------</td>
<td>-----------------------------------------</td>
<td>------------</td>
<td>------------------------------------------</td>
<td>-------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>66</td>
<td>Not Functionally Eligible</td>
<td>MGD-9720-R</td>
<td>CLTS Disenrollment Notice</td>
<td>End reason is currently manually entered. Notice is sent to the member with the next weekly letter generation batch.</td>
</tr>
<tr>
<td>67</td>
<td>Released from Incarceration</td>
<td>MGD-9710-R</td>
<td>CLTS Confirmation Notice</td>
<td>Start reason is can be selected when entering enrollment. Notice is sent to the member with the next weekly generation batch.</td>
</tr>
<tr>
<td>2A</td>
<td>Transition to an Adult Long Term Care Program</td>
<td>MGD-9720-R</td>
<td>CLTS Disenrollment Notice</td>
<td>Can be used as both a start and end reason and is manually entered. A confirmation notice will be sent when used as a start reason. A disenrollment notice is not sent to the member on ending.</td>
</tr>
<tr>
<td>2D</td>
<td>Waiver Agency Transfer</td>
<td>MGD-9710-R</td>
<td>CLTS Confirmation Notice –OR– NONE</td>
<td>End reason is manually entered. Notice is sent to the member with the next weekly letter generation batch.</td>
</tr>
<tr>
<td>2G</td>
<td>Member Placed in a Non-Eligible Setting</td>
<td>MGD-9720-R</td>
<td>CLTS Disenrollment Notice</td>
<td>Start reason is selected when entering enrollment. Notice is sent to the member with the next weekly generation batch.</td>
</tr>
<tr>
<td>2J</td>
<td>Enrolled from Waitlist</td>
<td>MGD-9710-R</td>
<td>CLTS Confirmation Notice</td>
<td>Start reason is can be selected when entering enrollment. Notice is sent to the member with the next weekly generation batch.</td>
</tr>
<tr>
<td>2K</td>
<td>Returned from Ineligible Setting</td>
<td>MGD-9710-R</td>
<td>CLTS Confirmation Notice</td>
<td>Start reason is entered manually when adding enrollment. This end reason is currently manually entered. Notice is sent to the member with the next weekly letter generation batch.</td>
</tr>
<tr>
<td>2L</td>
<td>New Enrollment</td>
<td>MGD-9710-R</td>
<td>CLTS Confirmation Notice</td>
<td>Start reason is entered manually when adding enrollment. This end reason is currently manually entered. Notice is sent to the member with the next weekly letter generation batch.</td>
</tr>
<tr>
<td>Reason Code</td>
<td>Reason Code Description</td>
<td>MGD Letter</td>
<td>Letter Description</td>
<td>Entry Method</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------------------</td>
<td>------------</td>
<td>--------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>7N</td>
<td>No Annual Screen Completed</td>
<td>MGD-9720-R</td>
<td>CLTS Disenrollment Notice</td>
<td>End reason is set automatically when a member's annual screen is not completed on time. Not currently in use.</td>
</tr>
<tr>
<td>7O</td>
<td>Moved Out of State</td>
<td>MGD-9720-R</td>
<td>CLTS Disenrollment Notice</td>
<td>End reason is currently manually entered. Notice is sent to the member with the next weekly letter generation batch.</td>
</tr>
<tr>
<td>7P</td>
<td>No Longer Accepting Services</td>
<td>MGD-9720-R</td>
<td>CLTS Disenrollment Notice</td>
<td>End reason is currently manually entered. Notice is sent to the member with the next weekly letter generation batch.</td>
</tr>
</tbody>
</table>