

User Guide

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

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WISCONSIN DEPARTMENT
of HEALTH SERVICES

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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 Bureau of Children's 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's administrator to grant access to the user.

Access to the secure Portal is **not** possible without a PIN. The letter also includes a Login ID, which is a health care provider's National Provider Identifier (NPI) or a non-healthcare provider's Medicaid Provider ID or Waiver Agency ID. For security purposes, the Login ID contains only digits three–six 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 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 Wisconsin Department of Health Services (DHS) 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 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:

1. Access the Portal at <https://www.forwardhealth.wi.gov/>.

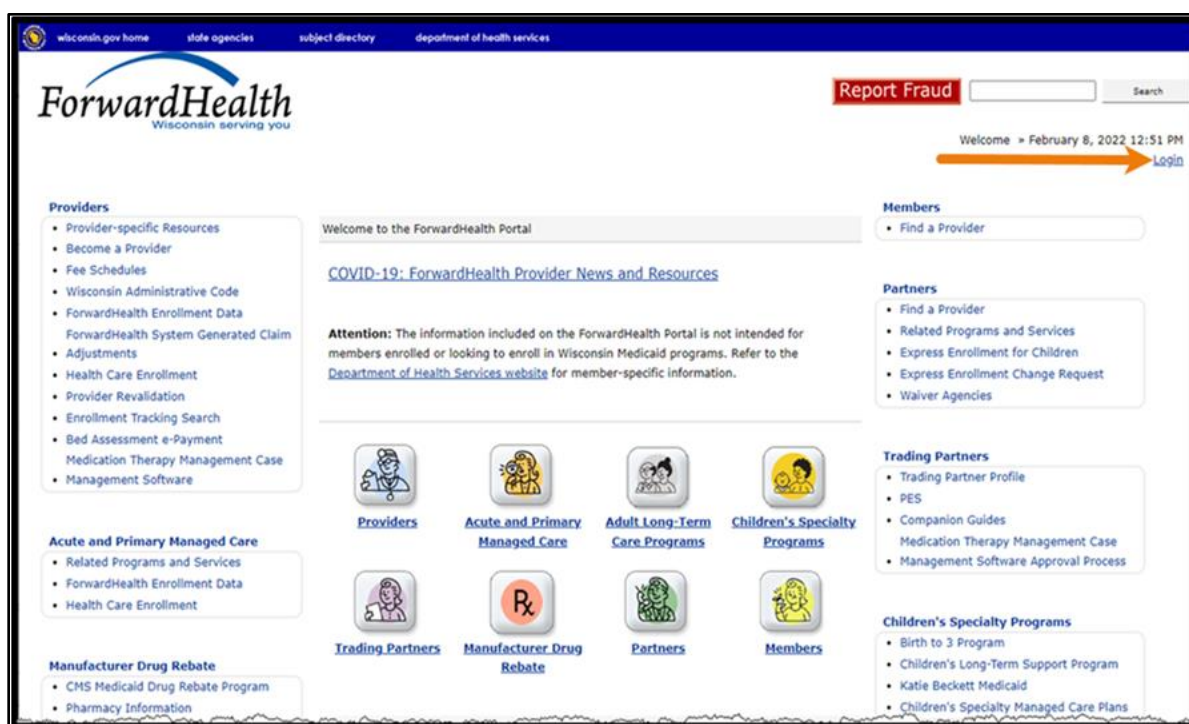
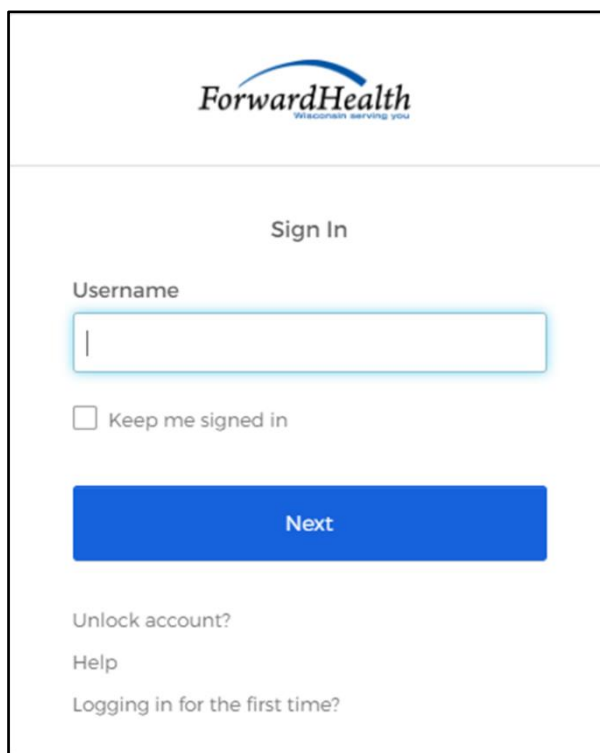


Figure 1 ForwardHealth Portal Page

2. Click **Login**. A Sign In box will be displayed.

The image shows a web-based sign-in interface for ForwardHealth. At the top is the ForwardHealth logo with the tagline "Wisconsin serving you". Below the logo is a horizontal line, followed by the text "Sign In". Underneath is a label "Username" above a text input field. Below the input field is a checkbox labeled "Keep me signed in". A large blue button with the text "Next" is positioned below the checkbox. At the bottom of the form are three links: "Unlock account?", "Help", and "Logging in for the first time?".

ForwardHealth
Wisconsin serving you

Sign In

Username

☐ Keep me signed in

Next

[Unlock account?](#)

[Help](#)

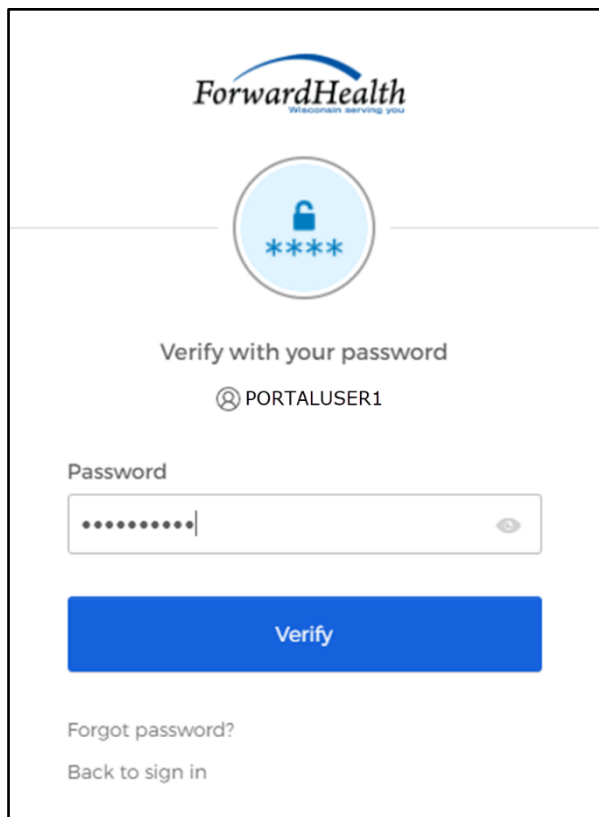
[Logging in for the first time?](#)

Figure 2 Sign In Box

3. Enter the user's username.

Note: If the user has access to the Portal through more than one agency, 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.

- Click **Next**. A Verify with your password box will be displayed.



ForwardHealth
Wisconsin serving you

Verify with your password

PORTALUSER1

Password

Verify

[Forgot password?](#)

[Back to sign in](#)

Figure 3 Verify With Your Password Box

- Enter the user's password.

6. Click **Verify**. The secure Waiver Agency page will be displayed.

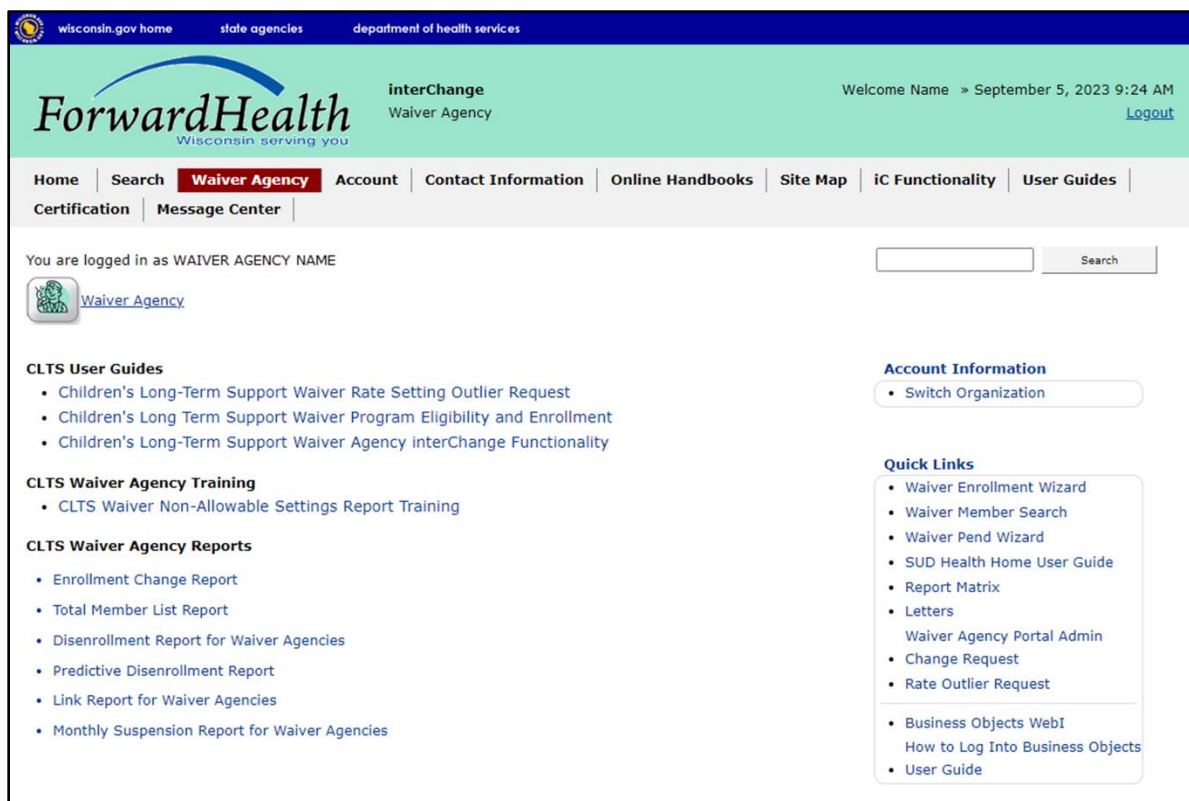


Figure 4 Secure Waiver Agency Page

2.1 User Guides

A user can view the Children's Long-Term Support Waiver Rate Setting Outlier Request, Children's Long-Term Support Waiver Program Eligibility and Enrollment, and Children's Long-Term Support Waiver Agency interChange Functionality user guides by clicking the links under the CLTS User Guides heading on the secure Waiver Agency page. A user can view all user guides to which the user has access by clicking the User Guides tab.

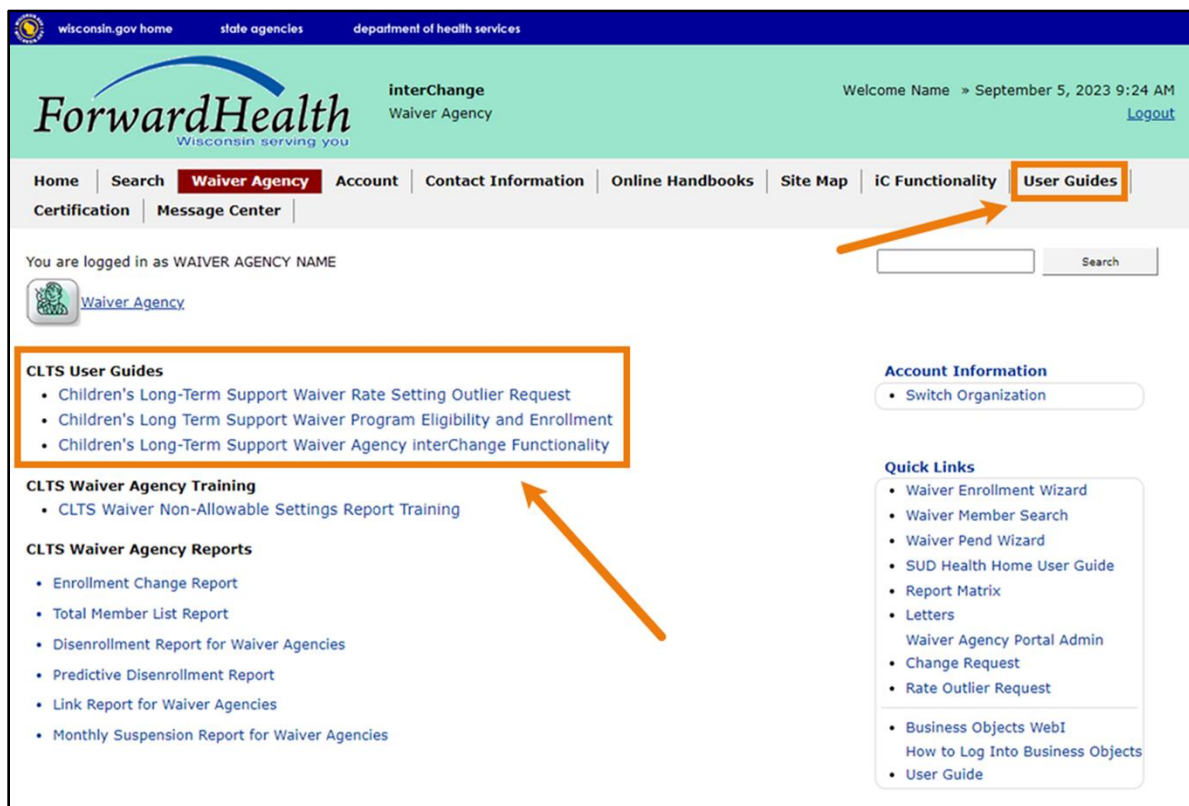


Figure 5 Secure Waiver Agency Page

Other user guides, such as the ForwardHealth Provider Portal Account User Guide, may be accessed on the [User Guides page](#) 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 user for a different organization within the same account without logging off.
- Users 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

Required fields are indicated with an asterisk (*).

NPI	Provider ID	Address	City	State	ZIP	ZIP + 4	Taxonomy	Provider Type	Payer	Default Provider ID
99999999	123 MAIN ST	ANYTOWN WI	55555	1111				-	<input checked="" type="checkbox"/>	

Select row above to update.

Currently Selected Provider

Current Provider

Newly Selected Provider

NPI Provider ID
Address Taxonomy
City Provider Type
State Default Provider ID ☐
ZIP - Payer

Switch To Set As Default

Figure 6 Switch Organization Panel

Fields on the Switch Organization panel contain 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 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 user account will be displayed below the Waiver Agency ID.

- To switch organizations, click the row containing the appropriate organization. The organization's information will auto-populate in the "Currently Selected Provider" and "Newly Selected Provider" sections.

Switch Organization

Required fields are indicated with an asterisk (*).

NPI	Provider ID	Address	City	State	ZIP	ZIP + 4	Taxonomy	Provider Type	Payer	Default Provider ID
99999999	123 MAIN ST	ANYTOWN WI	5555	1111						<input checked="" type="checkbox"/>

Select row above to update.

Currently Selected Provider

Current Provider: 99999999

Newly Selected Provider

NPI:

Address: 123 MAIN ST

City: ANYTOWN

State: WI

ZIP: 5555 - 1111

Provider ID: 99999999

Taxonomy:

Provider Type:

Default Provider ID: ☒

Payer:

Switch To Set As Default

Figure 7 Switch Organization Panel With Auto-Populated Information

3. If the user wishes to switch to the selected organization's account, they should click **Switch To**. A dialog box will appear to confirm the selection.

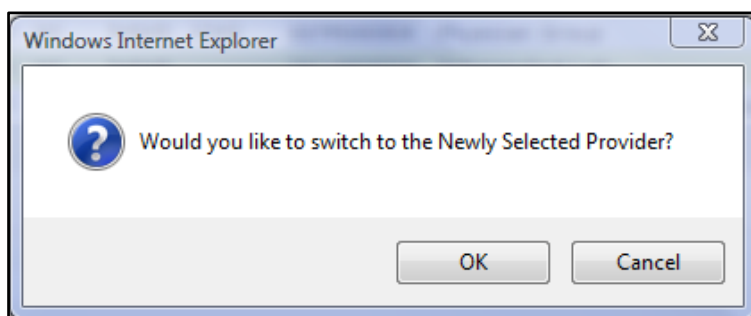


Figure 8 Dialog Box

4. 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.
2. Click **Set As Default**.

Switch Organization

Required fields are indicated with an asterisk (*).

NPI	Provider ID	Address	City	State	ZIP	ZIP + 4	Taxonomy	Provider Type	Payer	Default Provider ID
99999999	123 MAIN ST	ANYTOWN WI	5555	1111						<input checked="" type="checkbox"/>

Select row above to update.

Currently Selected Provider

Current Provider: 99999999

Newly Selected Provider

NPI: Provider ID: 99999999

Address: 123 MAIN ST Taxonomy:

City: ANYTOWN Provider Type:

State: WI Default Provider ID: ☒

ZIP: 5555 - 1111 Payer:

Switch To Set As Default

Figure 9 Switch Organization Panel With Auto-Populated Information

The Switch Organization panel will refresh and checkmarks will be displayed in the Default Provider ID boxes for the selected organization.

Switch Organization

Required fields are indicated with an asterisk (*).

NPI	Provider ID	Address	City	State	ZIP	ZIP + 4	Taxonomy	Provider Type	Payer	Default Provider ID
99999999	123 MAIN ST	ANYTOWN	WI	55555	1111	-	-	-	-	<input checked="" type="checkbox"/>

Select row above to update.

Currently Selected Provider

Current Provider: 99999999

Newly Selected Provider

NPI: Provider ID: 99999999

Address: 123 MAIN ST Taxonomy:

City: ANYTOWN Provider Type:

State: WI **Default Provider ID** ☒

ZIP: 55555 - 1111 Payer:

Switch To Set As Default

Figure 10 Switch Organization Panel

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 Agency Portal Administrator Change Request

This functionality allows county waiver agency (CWA) clerks to request a change of their agency's administrator via the Portal. Clerks can make the request for themselves or on behalf of someone else in their agency.

1. On the Secure Waiver Agency page, click **Waiver Agency Portal Admin Change Request**.

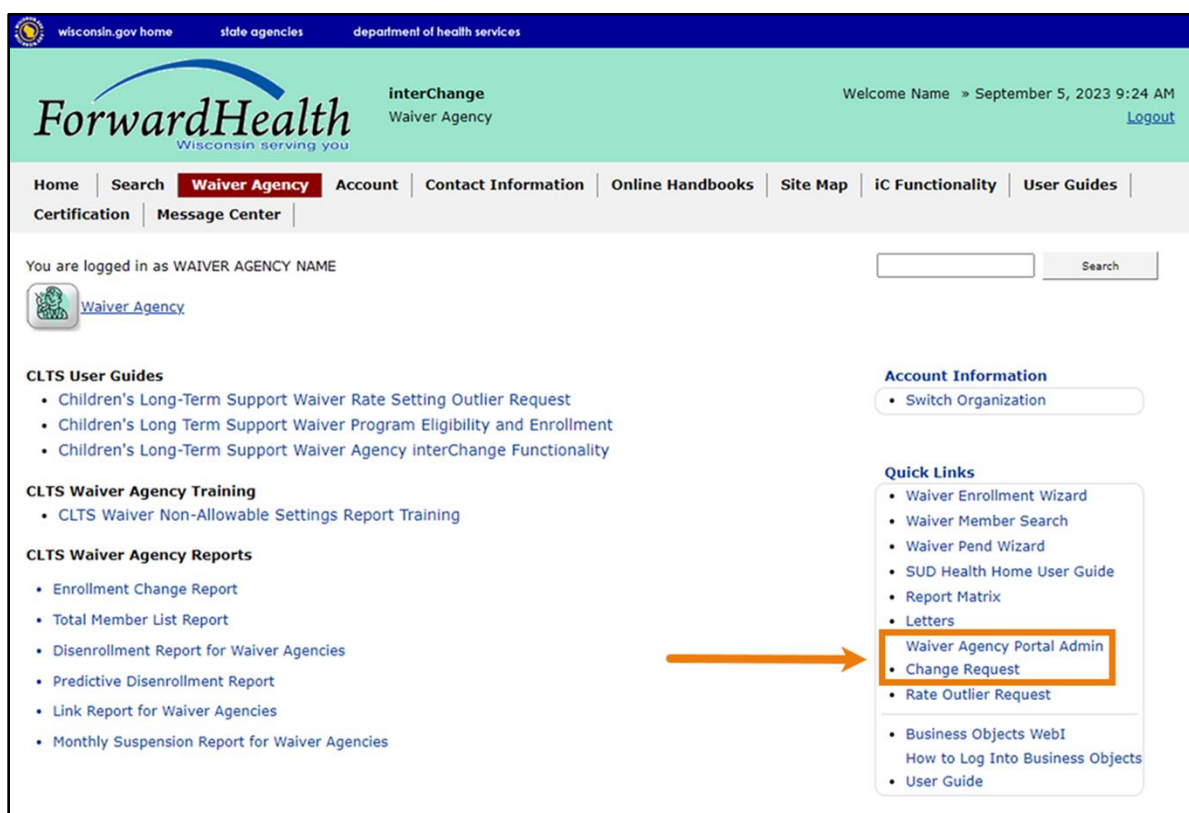


Figure 10 Secure Waiver Agency Page

The Waiver Agency Portal Admin Change Request panel will be displayed.

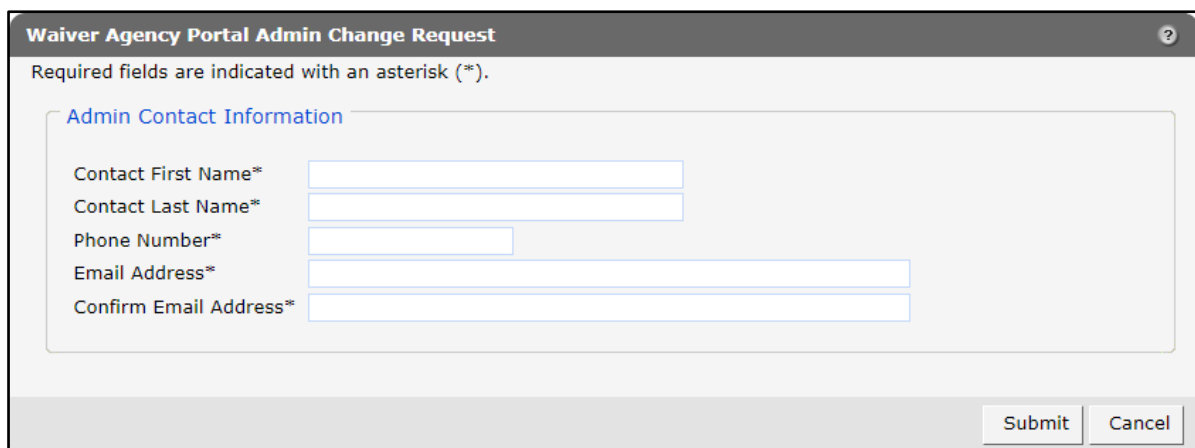
The image shows a web form titled "Waiver Agency Portal Admin Change Request". At the top, it states "Required fields are indicated with an asterisk (*)". Below this is a section titled "Admin Contact Information" which contains five input fields: "Contact First Name*", "Contact Last Name*", "Phone Number*", "Email Address*", and "Confirm Email Address*". Each field has a corresponding text input box. At the bottom right of the form, there are two buttons: "Submit" and "Cancel".

Figure 11 CLTS Waiver Agency Portal Admin Change Request Panel

2. Enter administrator contact information in the fields. It is necessary to **complete all the fields** on this page. An error message will be displayed if any of the information is not provided.
3. Click **Submit**. A message will be displayed at the top of the page indicating the request has been submitted to DHS for approval.

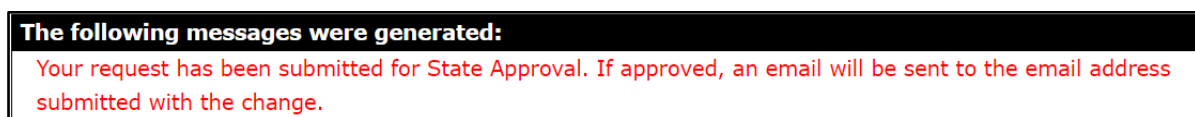
The image shows a confirmation message box with a black header that reads "The following messages were generated:". Below the header, the message "Your request has been submitted for State Approval. If approved, an email will be sent to the email address submitted with the change." is displayed in red text.

Figure 12 Confirmation Message

4. An autogenerated email will be sent to administrators of the new waiver agency admin role that there is a pending request that needs to be reviewed. Once approved, an email will be sent to the new administrator announcing that the request has been approved. A PIN letter will be sent to the new administrator at the agency address on file with further instructions. Note: The agency can email the CLTS inbox at dhsclts@dhs.wisconsin.gov if they do not have anyone with access to the waiver agency Portal that can submit the request.

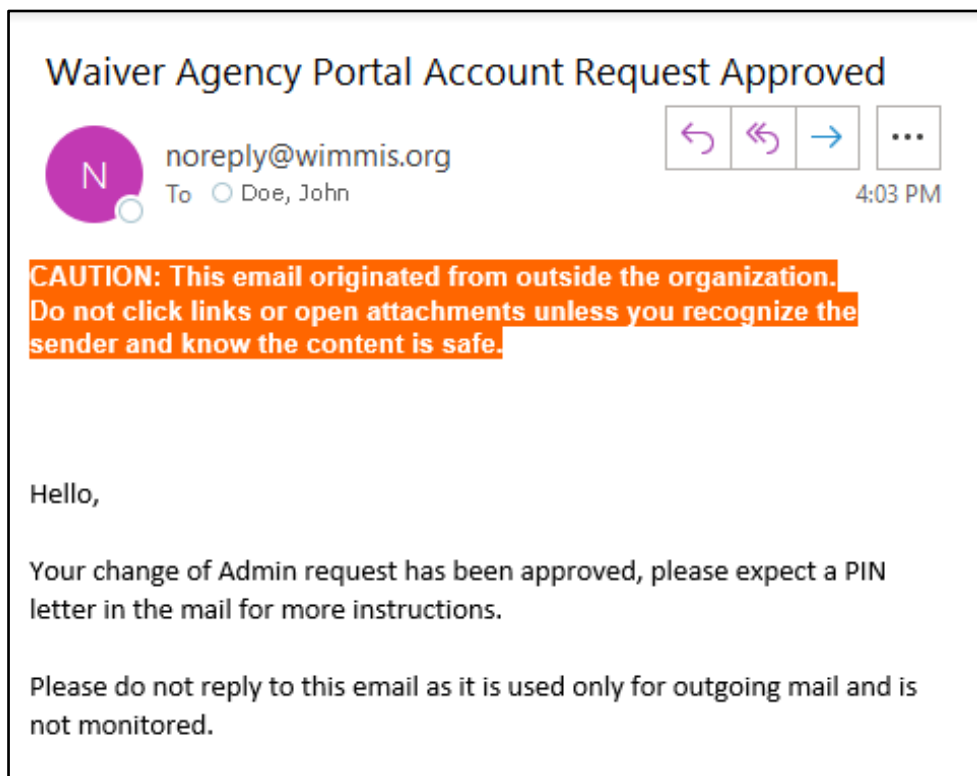


Figure 12 Waiver Agency Portal Account Request Approved Email

5 Waiver Enrollment Wizard

The Waiver Enrollment Wizard on the Portal allows authorized users to access member information and enroll members in waiver programs that require Medicaid and functional eligibility. With this tool, users can add, update, suspend, and end member enrollments.

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

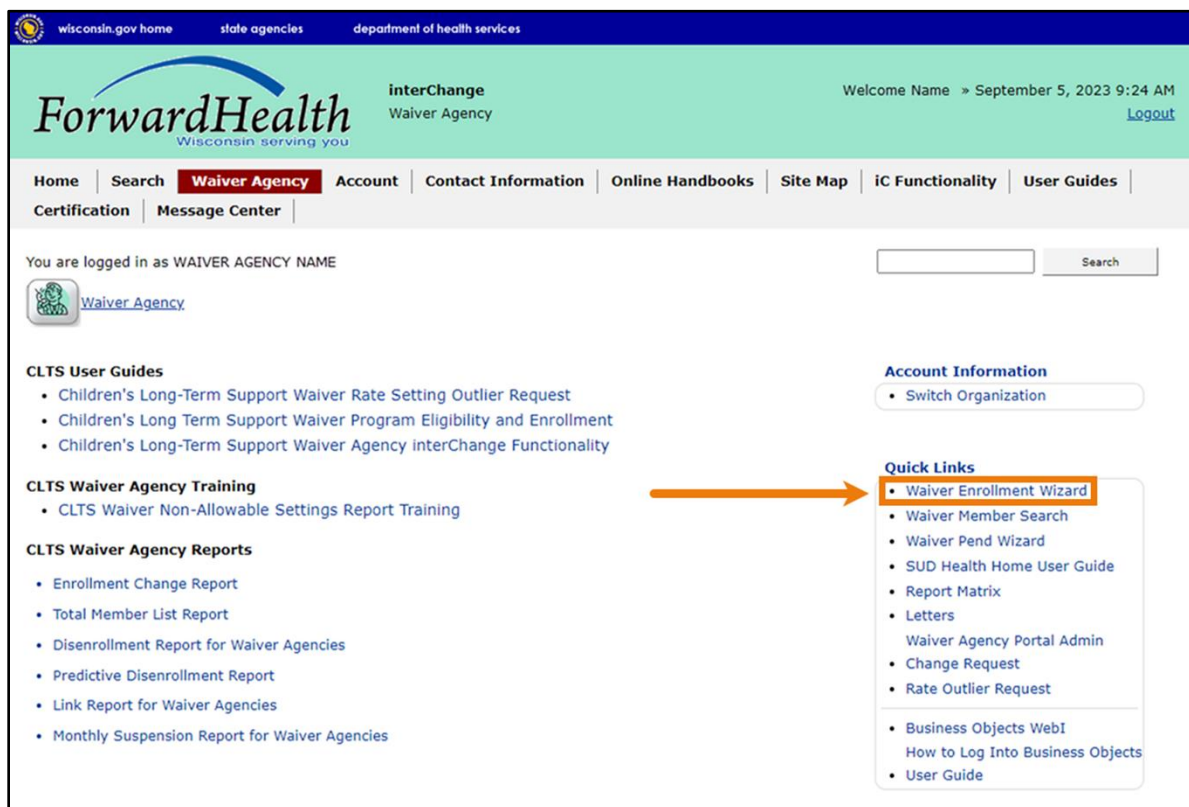
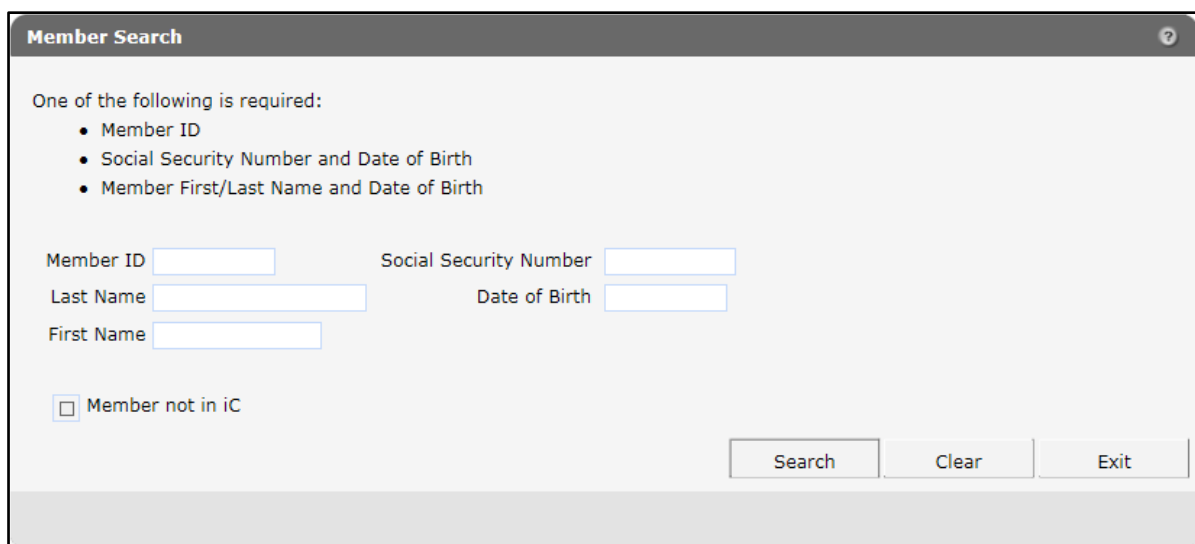


Figure 13 Secure Waiver Agency Page

The Member Search panel will be displayed.



Member Search

One of the following is required:

- Member ID
- Social Security Number and Date of Birth
- Member First/Last Name and Date of Birth

Member ID Social Security Number

Last Name Date of Birth

First Name

☐ Member not in iC

Figure 14 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 MCI 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 uses the above combinations of member information to search interChange for a one-to-one match. 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.

Note: Clicking **Exit** will end the session and return the user to the secure Waiver Agency page.

Once a one-to-one match has been found, the “Search Results” section will be displayed.

Member Search

One of the following is required:

- Member ID
- Social Security Number and Date of Birth
- Member First/Last Name and Date of Birth

Member ID: 0987654321 Social Security Number:

Last Name: Date of Birth:

First Name:

☐ Member not in iC

Search Results

Member Information

Member ID: 0987654321 Name: IMA MEMBER

Date of Birth: 12/27/2005 County: Dane

Medicare Beneficiary ID: DDDDDDDDDDD Address: 123 MAIN ST
MADISON WI, 53718-0000

Benefit Plan

Benefit Plan	Effective Date	End Date
Medicaid Purchase Plan	08/01/2017	12/31/2299

MCO Enrollment History

*** No rows found ***

LOC - Adult

*** No rows found ***

LOC - Children's

Waiver Program	Eligibility	Target Groups	Effective Date	End Date
CLTS	ELG	DD1	01/01/2018	01/31/2019

Waiver History

Waiver Program	Waiver Agency	Effective Date	End Date	Status
CLTS	DANE - DEPT OF HUMAN SERVICES	01/01/2018	07/31/2018	ACTIVE
CLTS	DANE - DEPT OF HUMAN SERVICES	10/01/2018	10/31/2018	ACTIVE
CLTS	DANE - DEPT OF HUMAN SERVICES	12/25/2018	01/31/2019	SUSPENDED
CLTS	DANE - DEPT OF HUMAN SERVICES	08/01/2018	09/30/2018	SUSPENDED
CLTS	DANE - DEPT OF HUMAN SERVICES	11/01/2018	11/30/2018	SUSPENDED
CLTS	DANE - DEPT OF HUMAN SERVICES	12/01/2018	12/24/2018	ACTIVE

Figure 15 Member Search Panel With “Search Results” Section

The “Search Results” section displays the member’s information, including demographics, benefit plans, levels of care (LOC), and all active and suspended enrollment records for the user’s Waiver Agency.

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. Verify that the correct MCI ID is being used and that the child has been enrolled in Medicaid. Users can contact the SOS Help Desk for assistance with verifying the correct MCI ID.

3. Click **Next**. The Waiver Enrollment Options panel will be displayed.

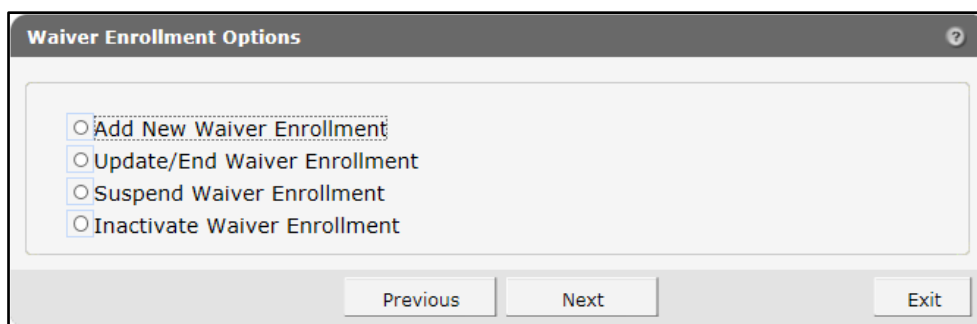


Figure 16 Waiver Enrollment Options Panel

The Waiver Enrollment Options panel includes the following options:

- *Add New Waiver Enrollment* allows the user to enroll or re-enroll the member in a waiver program.

For instructions on adding a waiver enrollment, proceed to [Chapter 6](#).

- *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 7](#).

For instructions on ending an enrollment record, proceed to [Chapter 8](#).

- *Suspend Waiver Enrollment* allows the user to suspend a member's enrollment in the 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 9](#).

- *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 10](#).

6 Adding a New Enrollment for a Member

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**.

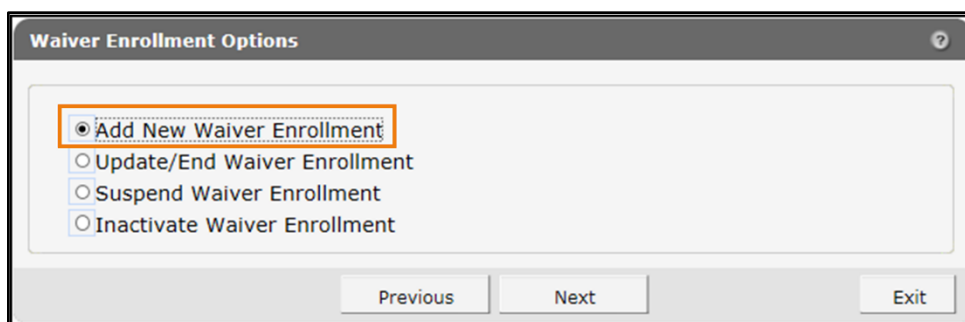
The image shows a software window titled "Waiver Enrollment Options". Inside, there are four radio button options: "Add New Waiver Enrollment" (which is selected and highlighted with an orange box), "Update/End Waiver Enrollment", "Suspend Waiver Enrollment", and "Inactivate Waiver Enrollment". At the bottom of the window are three buttons: "Previous", "Next", and "Exit".

Figure 17 Waiver Enrollment Options Panel

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

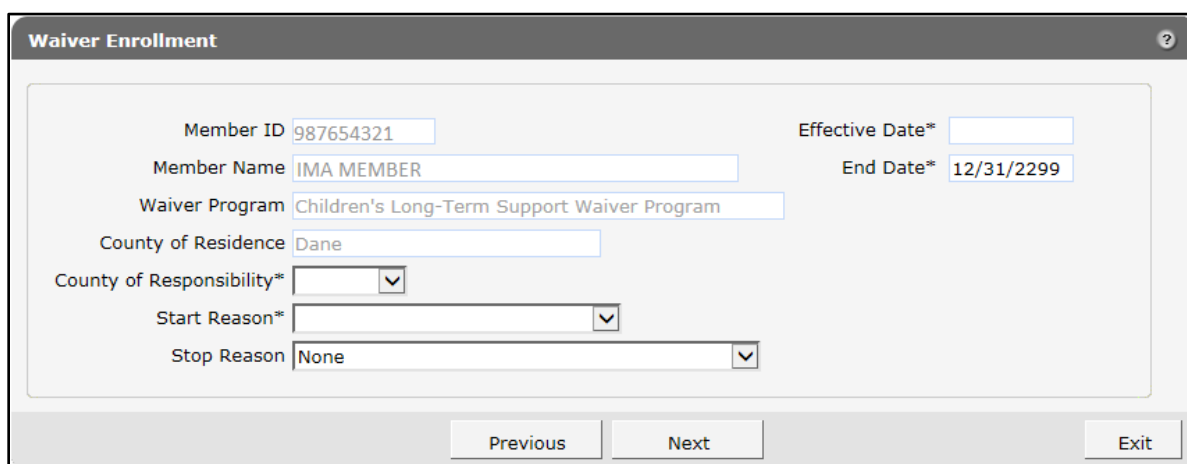
The image shows a software window titled "Waiver Enrollment". It contains several input fields: "Member ID" (987654321), "Member Name" (IMA MEMBER), "Effective Date*" (empty), "End Date*" (12/31/2299), "Waiver Program" (Children's Long-Term Support Waiver Program), "County of Residence" (Dane), "County of Responsibility*" (a dropdown menu), "Start Reason*" (a dropdown menu), and "Stop Reason" (None). At the bottom are three buttons: "Previous", "Next", and "Exit".

Figure 18 Waiver Enrollment Panel

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

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

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 appropriate county 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 as it is recorded in interChange. 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.

- Click **Next**. The Children's Functional Level of Care panel will be displayed.

Eligibility	Target Group Information	Effective Date	End Date
Children's Community Options Program <small>ELG</small>		10/03/2018	10/31/2019
Community Recovery Services <small>IEL</small>		11/01/2018	11/30/2019
Comprehensive Community Services <small>IEL</small>		11/01/2018	11/30/2019
Children's Long-Term Support Waiver Program <small>ELG</small>	PDN	10/03/2018	10/31/2019
Katie Beckett Medicaid <small>ELG</small>	NHM	10/03/2018	10/31/2019
MH Wrap Around <small>IEL</small>		11/01/2018	11/30/2019

Previous Next Exit

Figure 19 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:
 - o *ELG*—The member is eligible for the program.
 - o *IAG*—The member is ineligible due to age.
 - o *IEL*—The member is ineligible for the program.
 - o *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 display the relevant dates for any programs for which the member is, or has been, functionally eligible. The End Date field is automatically calculated as the last day of the month 12 months after the effective date of the 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.

Enrollment Determination Options

- Only one option can be selected

Requested Effective Date 07/07/2017

Based on enrollment criteria, the earliest Calculated Effective Date for this member is: 12/01/2017

☐ Accept the Calculated Effective Date and enroll

☐ Pend entire record from Requested Effective Date of 7/7/2017

☐ Pend from 07/07/2017 to 11/30/2017, and
Enroll from 12/01/2017 to 12/31/2299

☐ Cancel Enrollment

Previous Next Exit

Figure 20 Enrollment Determination Options Panel

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 enrollment record.
- *Cancel Enrollment*—The enrollment record will be canceled, no information will be saved, 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.

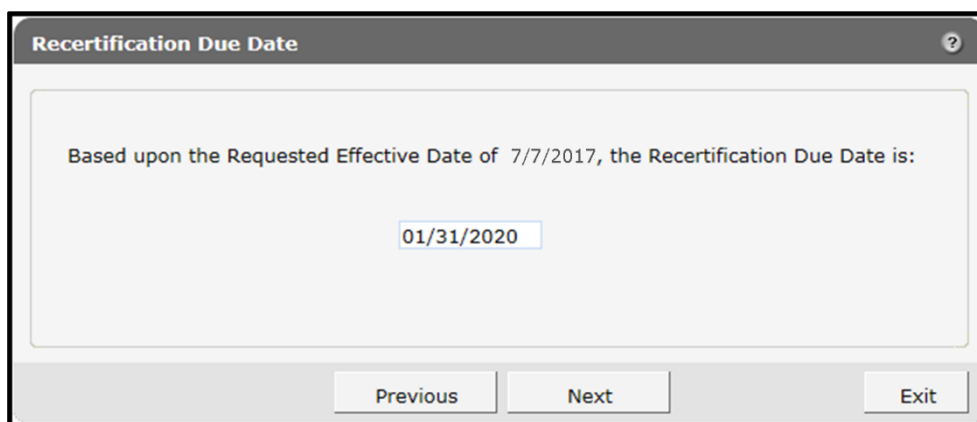
A screenshot of a software panel titled "Recertification Due Date" with a question mark icon in the top right corner. The panel has a light gray background. Inside, a text label reads "Based upon the Requested Effective Date of 7/7/2017, the Recertification Due Date is:". Below this label, the date "01/31/2020" is displayed within a white rectangular box with a thin blue border. At the bottom of the panel, there are three buttons: "Previous", "Next", and "Exit", each in a light gray box with a thin border.

Figure 21 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

Monthly Parental Fees History

Waiver Program	Waiver Agency	Monthly Parental Fee	Effective Date	End Date
CLTS	BUFFALO - DEPT OF HEALTH & HUMAN SERVICES	\$0.00	01/01/2019	11/30/2019

Monthly Parental Fees

Monthly Parental Fee* x Effective Date* End Date*

Add Cancel

Previous Next Exit

Figure 22 Parental Payment Liability Fee Panel

The “Monthly Parental Fees History” section displays information about parental fees 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 a new parental fee segment 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. 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.

- d. 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

Individual Service Plan History

Waiver Program	Waiver Agency	Individual Service Plan Completion Date	Individual Service Plan Type
----------------	---------------	---	------------------------------

Individual Service Plan Completion Date

Individual Service Plan Completion Date*

Individual Service Plan Type*

Add Cancel

Previous Next Exit

Figure 23 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. Types include:
 - Initial—This type is used to enter the date the initial ISP was completed.

- **Recertification**—This type is used to enter the date the ISP was completed for the annual recertification.
- **Update**—This type is used to enter the date the ISP was updated due to a child returning from a suspended status.

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.

Waiver Enrollment Summary	
Member ID	987654321
Member Name	IMA MEMBER
Waiver Program	CLTS
County of Residence	Dane
County Of Responsibility	Dane
LOC Effective Date	10/03/2018
LOC End Date	10/31/2019
Waiver Enrollment Effective Date	01/01/2019
Waiver Enrollment End Date	02/01/2019
Start Reason	New Enrollment
Stop Reason	Waiver Agency Transfer
Recertification Due Date	01/31/2020
Individual Service Plan Completion Date	01/01/2019
Monthly Parental Fee	\$1.00

Previous Submit Exit

Figure 24 Waiver Enrollment Summary Panel

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. Users should review the enrollment record for the changes that have been made.

The Confirmation panel will be displayed.

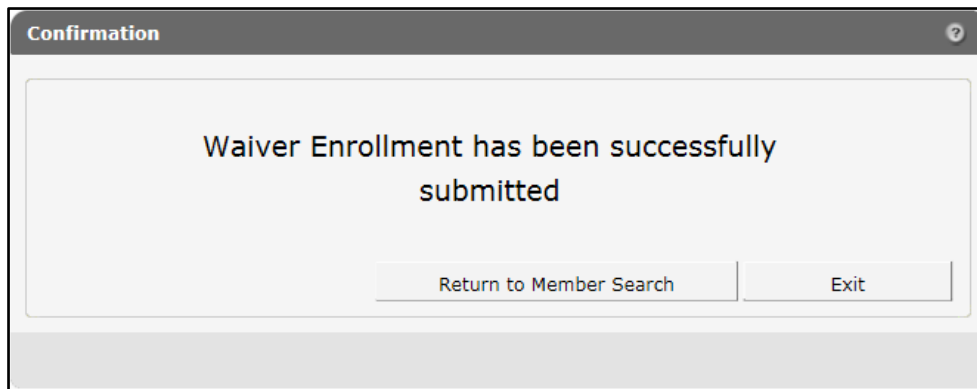


Figure 25 Confirmation Panel

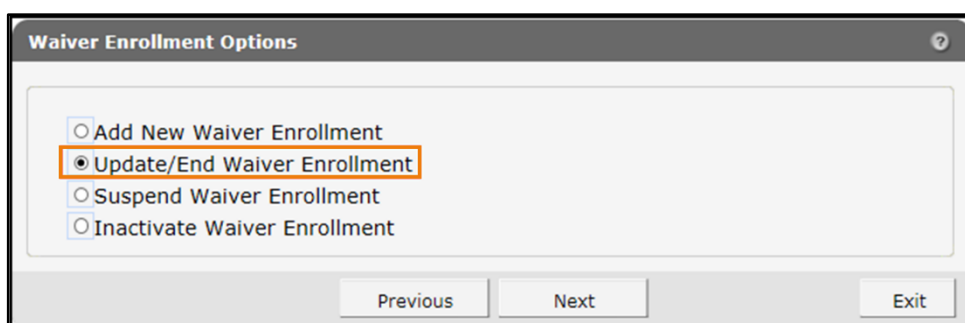
16. Click **Return to Member Search** to return to the Member Search panel to begin any other enrollment tasks.
17. Click **Exit** to return to the secure Waiver Agency page.

7 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**.

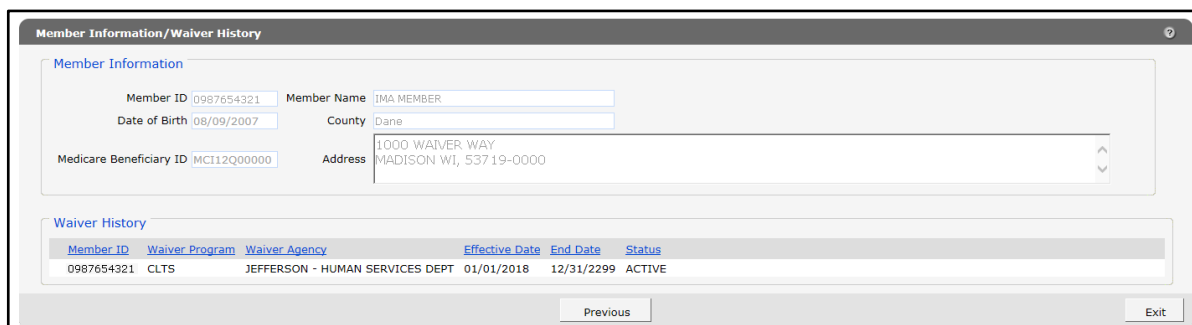


The image shows a software window titled "Waiver Enrollment Options". Inside, there are four radio button options: "Add New Waiver Enrollment", "Update/End Waiver Enrollment" (which is selected and highlighted with an orange rectangle), "Suspend Waiver Enrollment", and "Inactivate Waiver Enrollment". At the bottom of the window are three buttons: "Previous", "Next", and "Exit".

Figure 26 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.



The image shows a software window titled "Member Information/Waiver History". It is divided into two main sections: "Member Information" and "Waiver History".

Member Information: This section contains several input fields:

- Member ID: 0987654321
- Member Name: JMA MEMBER
- Date of Birth: 08/09/2007
- County: Dane
- Medicare Beneficiary ID: MCI12Q00000
- Address: 1000 WAIVER WAY, MADISON WI, 53719-0000

Waiver History: This section contains a table with the following data:

Member ID	Waiver Program	Waiver Agency	Effective Date	End Date	Status
0987654321	CLTS	JEFFERSON - HUMAN SERVICES DEPT	01/01/2018	12/31/2299	ACTIVE

At the bottom of the window are two buttons: "Previous" and "Exit".

Figure 27 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 modified. The Waiver Enrollment panel will be displayed.

The screenshot shows a web-based form titled "Waiver Enrollment". The form contains the following fields and values:

- Member ID: 987654321
- Member Name: IMA MEMBER
- Waiver Program: Children's Long-Term Support Waiver Program
- County of Residence: Dane
- County of Responsibility*: 13 Dane (dropdown menu)
- Start Reason*: New Enrollment (dropdown menu)
- Stop Reason: Waiver Agency Transfer (dropdown menu)
- Effective Date*: 01/01/2019
- End Date*: 02/01/2019
- Recertification Due Date*: 01/31/2020
- Recertification Completion Date: (empty field)

At the bottom of the form, there are three buttons: "Previous", "Next", and "Exit".

Figure 28 Waiver Enrollment Panel

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

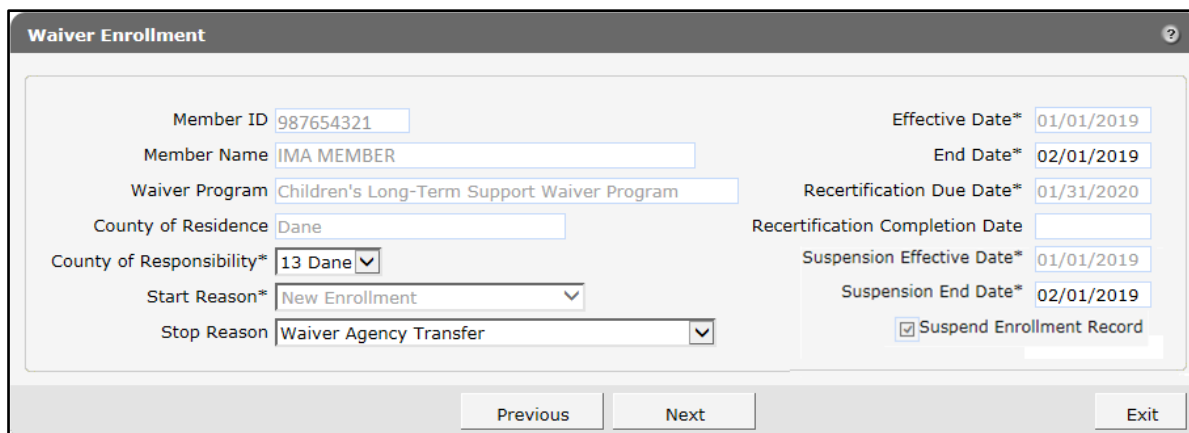
The fields that may be edited include the following:

- 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 manually entered in the End Date field by the user.

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 enrollment is ending, enter that end date instead.
- The *Recertification Completion Date* field indicates the most recent date on which the member completed recertification for waiver enrollment. When 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. Refer to [Chapter 9: Suspending a Member's Enrollment](#) for more information on suspensions.



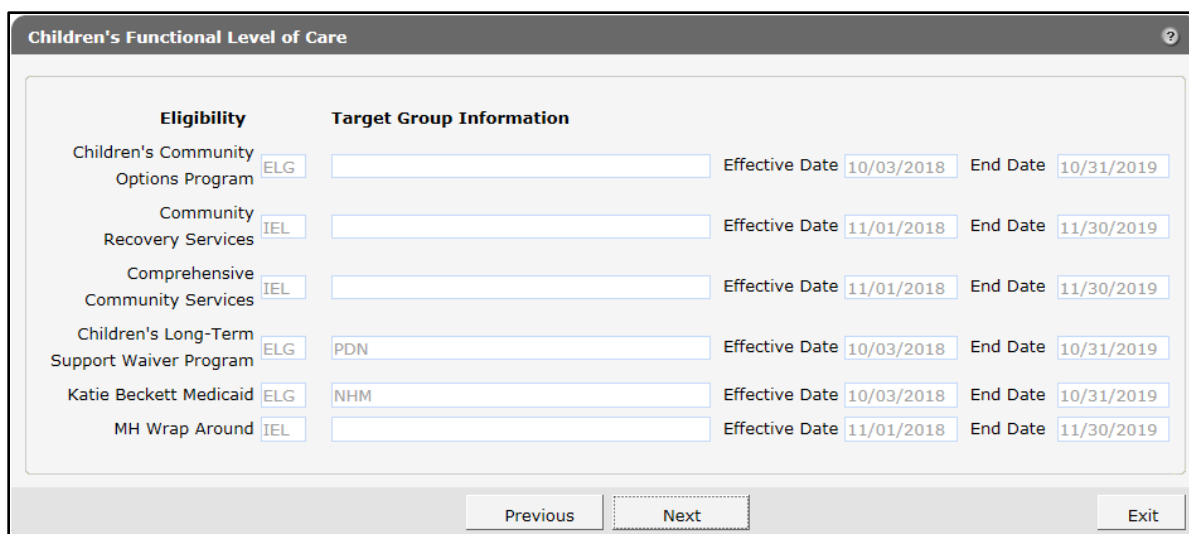
The Waiver Enrollment panel displays member information and enrollment details. Fields include:

- Member ID: 987654321
- Member Name: IMA MEMBER
- Waiver Program: Children's Long-Term Support Waiver Program
- County of Residence: Dane
- County of Responsibility*: 13 Dane
- Start Reason*: New Enrollment
- Stop Reason: Waiver Agency Transfer
- Effective Date*: 01/01/2019
- End Date*: 02/01/2019
- Recertification Due Date*: 01/31/2020
- Recertification Completion Date:
- Suspension Effective Date*: 01/01/2019
- Suspension End Date*: 02/01/2019
- ☒ Suspend Enrollment Record

Navigation buttons: Previous, Next, Exit.

Figure 29 Waiver Enrollment Panel for Suspended Record

- Use the drop-down menus to select the required information or enter it into the appropriate fields.
- When all edits have been completed, click **Next**. The Children's Functional Level of Care panel will be displayed.



The Children's Functional Level of Care panel displays eligibility and target group information. It includes a table with columns for Eligibility, Target Group Information, Effective Date, and End Date.

Eligibility	Target Group Information	Effective Date	End Date
Children's Community Options Program	ELG	10/03/2018	10/31/2019
Community Recovery Services	IEL	11/01/2018	11/30/2019
Comprehensive Community Services	IEL	11/01/2018	11/30/2019
Children's Long-Term Support Waiver Program	ELG PDN	10/03/2018	10/31/2019
Katie Beckett Medicaid	ELG NHM	10/03/2018	10/31/2019
MH Wrap Around	IEL	11/01/2018	11/30/2019

Navigation buttons: Previous, Next, Exit.

Figure 30 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.

- o *IAG*—The member is ineligible due to age.
 - o *IEL*—The member is ineligible for the program.
 - o *ILA*—The member is ineligible due to living situation.
 - 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.

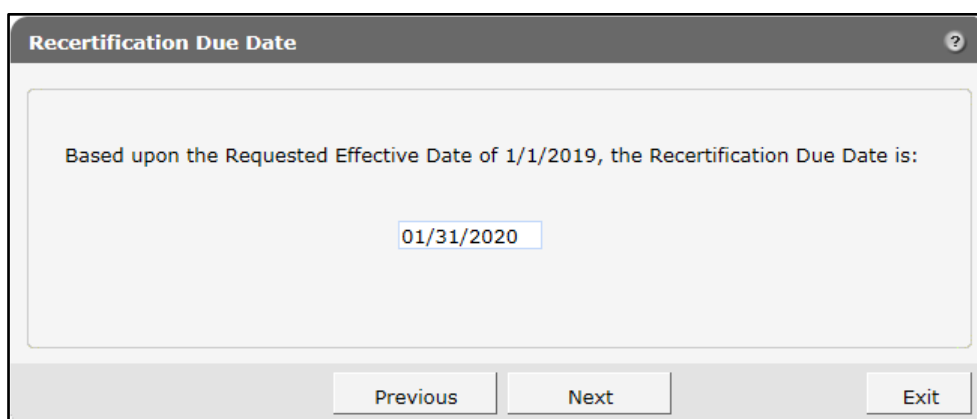
A screenshot of a software panel titled "Recertification Due Date" with a question mark icon in the top right corner. The panel has a light gray background. Inside, a text box contains the message: "Based upon the Requested Effective Date of 1/1/2019, the Recertification Due Date is:". Below this text, the date "01/31/2020" is displayed in a blue-bordered box. At the bottom of the panel, there are three buttons: "Previous", "Next", and "Exit".

Figure 31 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.

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

Waiver Program	Waiver Agency	Monthly Parental Fee	Effective Date	End Date
CLTS	BUFFALO - DEPT OF HEALTH & HUMAN SERVICES	\$0.00	01/01/2019	11/30/2019

Monthly Parental Fees History

Monthly Parental Fees

Monthly Parental Fee* x Effective Date* End Date*

Add Cancel

Previous Next Exit

Figure 32 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 programs 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 a new parental fee segment to the enrollment record, perform the following steps:

- a. Enter the dollar amount in the Monthly Parental Fee field.

Note: It is acceptable to enter \$0 in this field.

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

- d. 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.
9. To modify an existing parental fee segment, perform the following steps:
 - a. Select the segment 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.
 - b. Edit the date in the End Date field.
 - c. Click **Save**. The panel will refresh.
 - d. 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

Individual Service Plan History

Waiver Program	Waiver Agency	Individual Service Plan Completion Date	Individual Service Plan Type
CLTS	PEPIN - DEPT OF HUMAN SERVICES	07/15/2017	Initial

Individual Service Plan Completion Date

Individual Service Plan Completion Date* Individual Service Plan Type*

Add Cancel

Previous Next Exit

Figure 33 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 programs 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:

- Enter the date the ISP was completed into the designated field. Future dates cannot be entered, and records cannot have overlapping dates.
- Select the ISP type from the drop-down menu. Types include:
 - Initial—This type is used to enter the date the initial ISP was completed.
 - Recertification—This type is used to enter the date the ISP was completed for the annual recertification.
 - Update—This type is used to enter the date the ISP was updated due to a child returning from a suspended status.
- 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:

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

The screenshot displays the 'Waiver Enrollment Summary' panel. It contains the following fields and values:

Member ID	987654321	Waiver Enrollment Effective Date	01/01/2019	Start Reason	New Enrollment
Member Name	IMA MEMBER	Waiver Enrollment End Date	02/01/2019	Stop Reason	Waiver Agency Transfer
Waiver Program	CLTS	Recertification Due Date	01/31/2020		
County of Residence	Dane	Individual Service Plan Completion Date	01/01/2019		
County Of Responsibility	Dane				
LOC Effective Date	10/03/2018	Monthly Parental Fee	\$1.00		
LOC End Date	10/31/2019				

At the bottom of the panel are three buttons: 'Previous', 'Submit', and 'Exit'.

Figure 34 Waiver Enrollment Summary Panel

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.

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. Users should review the enrollment record for the changes that have been made.

The Confirmation panel will be displayed.

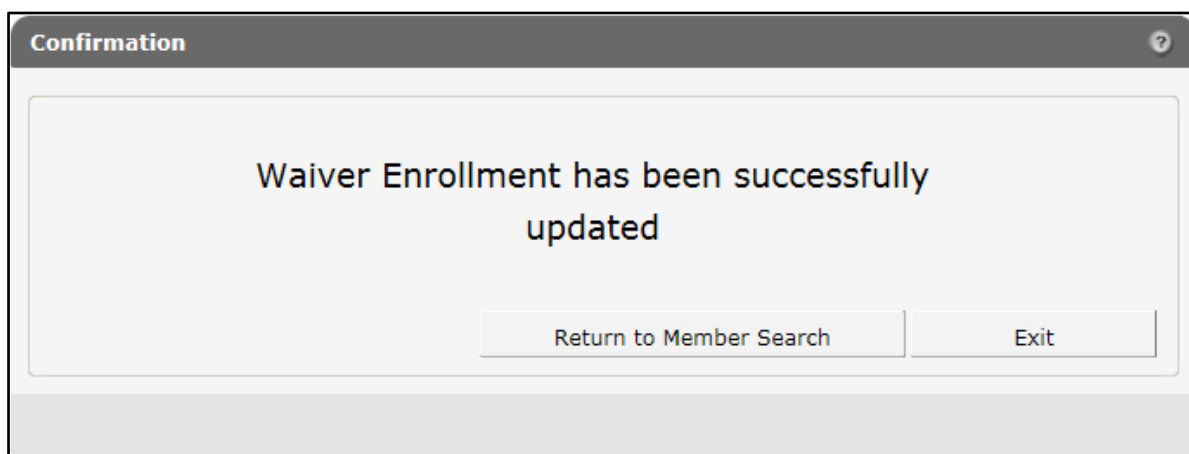


Figure 35 Confirmation Panel

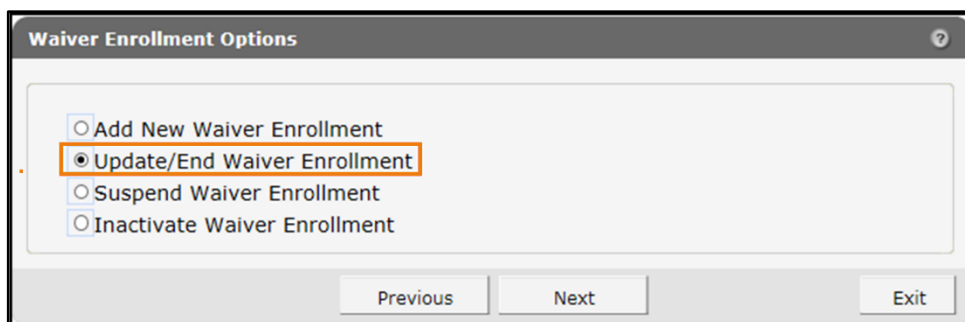
15. Click **Return to Member Search** to return to the Member Search panel to begin any other enrollment tasks.

Click **Exit** to return to the secure Waiver Agency page.

8 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 7: Updating a Member's Enrollment](#) for instructions.

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

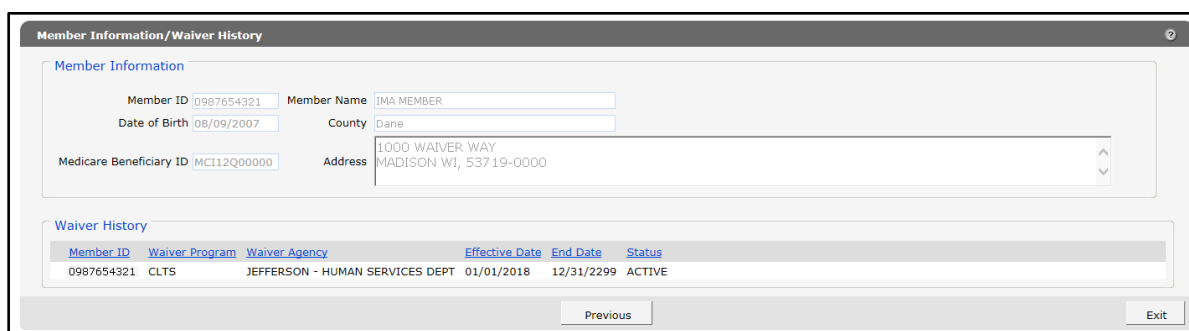


The screenshot shows the 'Waiver Enrollment Options' panel. It contains four radio button options: 'Add New Waiver Enrollment', 'Update/End Waiver Enrollment' (which is selected and highlighted with an orange border), 'Suspend Waiver Enrollment', and 'Inactivate Waiver Enrollment'. At the bottom of the panel are three buttons: 'Previous', 'Next', and 'Exit'.

Figure 36 Waiver Enrollment Options Panel

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.



The screenshot shows the 'Member Information/Waiver History' panel. It is divided into two sections: 'Member Information' and 'Waiver History'.

Member Information:

Member ID	0987654321	Member Name	IMA MEMBER
Date of Birth	08/09/2007	County	Dane
Medicare Beneficiary ID	MC112Q00000	Address	1000 WAIVER WAY MADISON WI, 53719-0000

Waiver History:

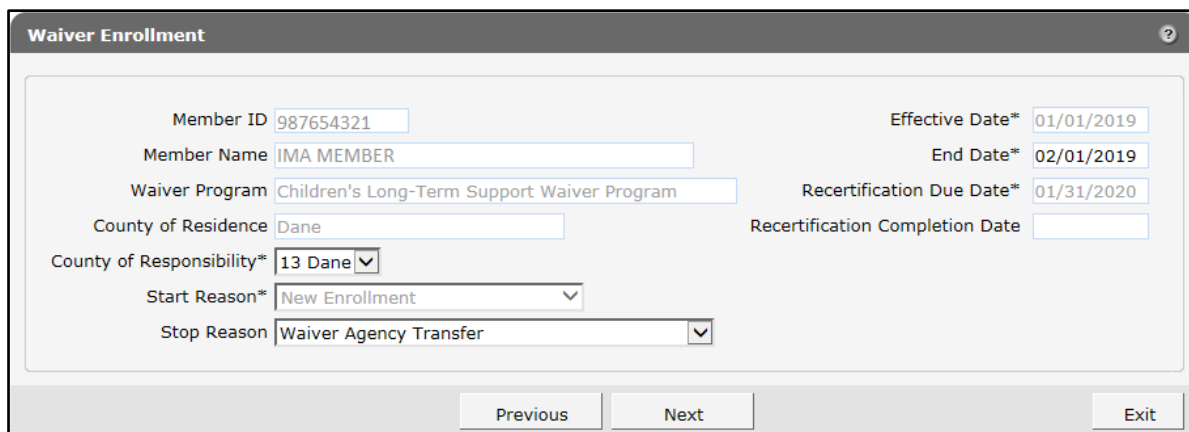
Member ID	Waiver Program	Waiver Agency	Effective Date	End Date	Status
0987654321	CLTS	JEFFERSON - HUMAN SERVICES DEPT	01/01/2018	12/31/2299	ACTIVE

At the bottom of the panel are two buttons: 'Previous' and 'Exit'.

Figure 37 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 ended. The Waiver Enrollment Panel will be displayed.



The Waiver Enrollment Panel is a form with the following fields:

- Member ID: 987654321
- Member Name: IMA MEMBER
- Waiver Program: Children's Long-Term Support Waiver Program
- County of Residence: Dane
- County of Responsibility*: 13 Dane
- Start Reason*: New Enrollment
- Stop Reason: Waiver Agency Transfer
- Effective Date*: 01/01/2019
- End Date*: 02/01/2019
- Recertification Due Date*: 01/31/2020
- Recertification Completion Date: (empty)

Buttons at the bottom: Previous, Next, Exit.

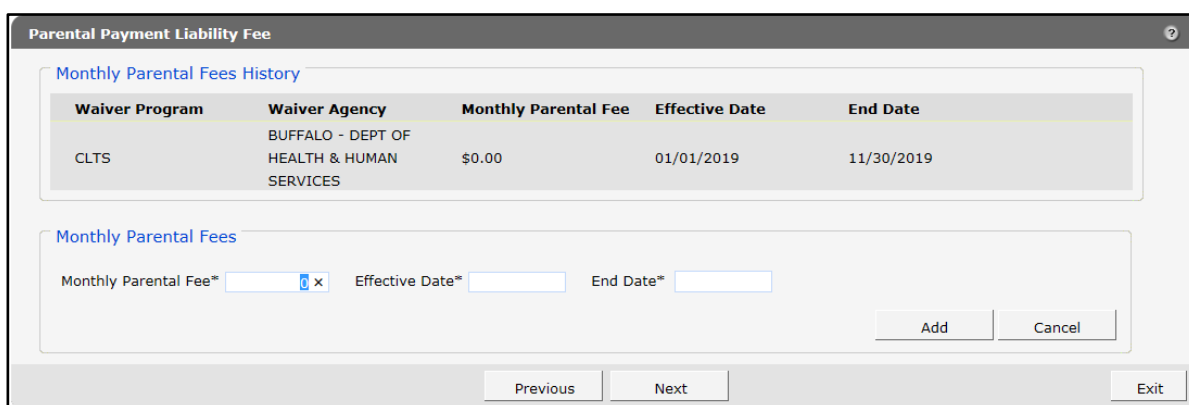
Figure 38 Waiver Enrollment Panel

Most fields on the Waiver Enrollment panel will be grayed out and prepopulated with the member's 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** and continue through the panels until the Parental Payment Liability Fee panel is displayed.



The Parental Payment Liability Fee Panel displays the following sections:

Monthly Parental Fees History

Waiver Program	Waiver Agency	Monthly Parental Fee	Effective Date	End Date
CLTS	BUFFALO - DEPT OF HEALTH & HUMAN SERVICES	\$0.00	01/01/2019	11/30/2019

Monthly Parental Fees

Monthly Parental Fee*: x Effective Date*: End Date*:

Buttons: Add, Cancel

Buttons at the bottom: Previous, Next, Exit.

Figure 39 Parental Payment Liability Fee Panel

The "Monthly Parental Fees History" section displays information about parental fees pertinent to the member's enrollment record and must be updated with the new end date.

- The *Waiver Program* column displays the programs 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.
- To modify an existing parental fee segment, perform the following steps:
 - Select the segment 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.
 - Continue through the panels by clicking **Next** and updating any necessary information until the Waiver Enrollment Summary panel is displayed.

The screenshot shows the "Waiver Enrollment Summary" panel with the following fields:

Member ID	987654321	Waiver Enrollment Effective Date	01/01/2019	Start Reason	New Enrollment
Member Name	IMA MEMBER	Waiver Enrollment End Date	02/01/2019	Stop Reason	Waiver Agency Transfer
Waiver Program	CLTS	Recertification Due Date	01/31/2020		
County of Residence	Dane	Individual Service Plan Completion Date	01/01/2019		
County Of Responsibility	Dane				
LOC Effective Date	10/03/2018	Monthly Parental Fee	\$1.00		
LOC End Date	10/31/2019				

At the bottom of the panel are three buttons: "Previous", "Submit", and "Exit".

Figure 40 Waiver Enrollment Summary Panel

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.

- 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. Users should review the enrollment record for the changes that have been made.

The Confirmation panel will be displayed.

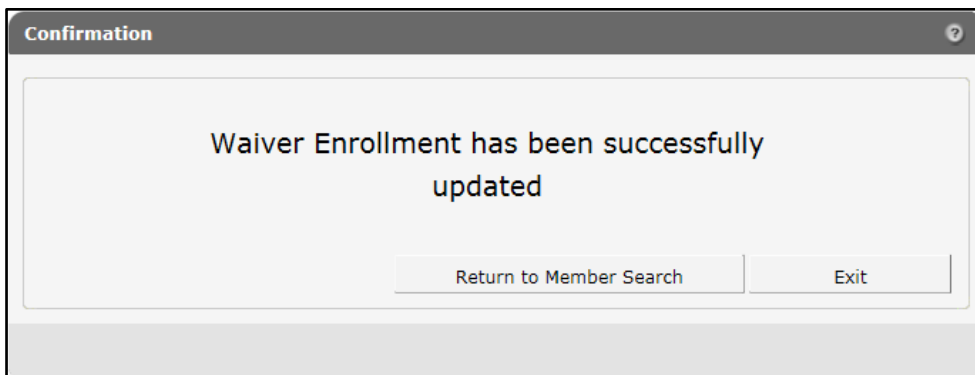


Figure 41 Confirmation Panel

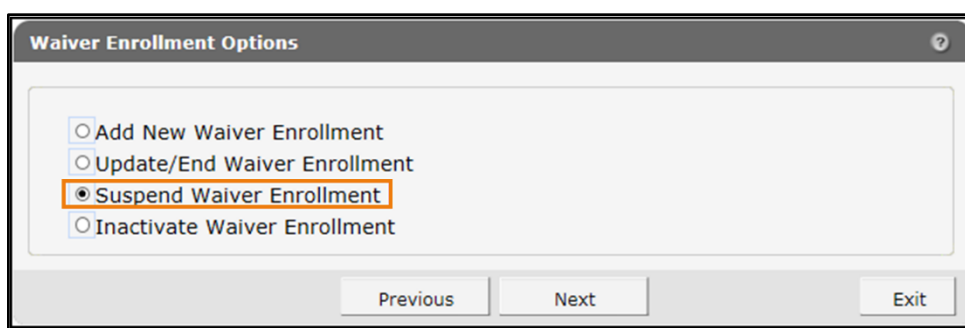
10. Click **Return to Member Search** to return to the Member Search panel to begin any other enrollment tasks.
11. Click **Exit** to return to the secure Waiver Agency page.

9 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.

Note: Successfully submitting the suspension record will automatically enddate the active enrollment, but this will not automatically generate a notice to the member. 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 6: Adding a New Enrollment for a Member](#) for instructions.

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

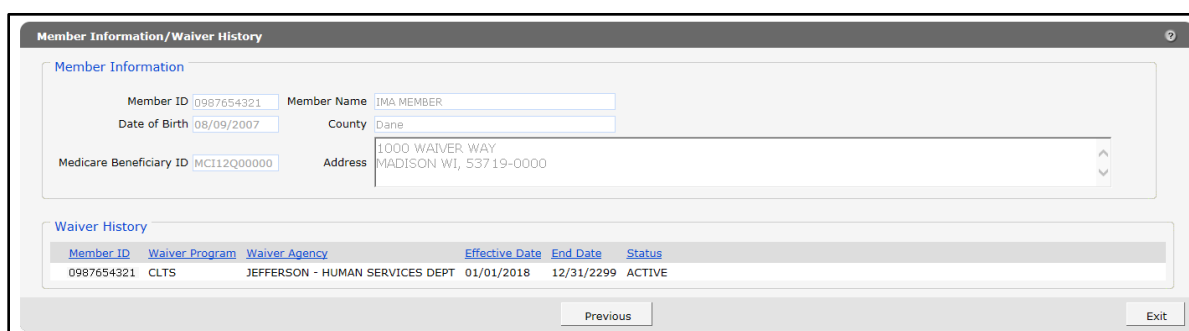


The image shows a software window titled "Waiver Enrollment Options". Inside, there are four radio button options: "Add New Waiver Enrollment", "Update/End Waiver Enrollment", "Suspend Waiver Enrollment" (which is selected and highlighted with an orange border), and "Inactivate Waiver Enrollment". At the bottom of the window are three buttons: "Previous", "Next", and "Exit".

Figure 42 Waiver Enrollment Options Panel

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.



The image shows a software window titled "Member Information/Waiver History". It is divided into two main sections: "Member Information" and "Waiver History".

Member Information: This section contains several fields:

- Member ID: 0987654321
- Member Name: JMA MEMBER
- Date of Birth: 08/09/2007
- County: Dane
- Medicare Beneficiary ID: MCI12Q00000
- Address: 1000 WAIVER WAY, MADISON WI, 53719-0000

Waiver History: This section contains a table with the following data:

Member ID	Waiver Program	Waiver Agency	Effective Date	End Date	Status
0987654321	CLTS	JEFFERSON - HUMAN SERVICES DEPT	01/01/2018	12/31/2299	ACTIVE

At the bottom of the window are two buttons: "Previous" and "Exit".

Figure 43 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 suspended. The Waiver Enrollment panel will be displayed with a stop reason that defaults to "Suspended."

The screenshot shows the 'Waiver Enrollment' panel with the following fields and values:

Member ID	9876543210	Effective Date*	01/01/2019
Member Name	IMA MEMBER	End Date*	02/01/2019
Waiver Program	Children's Long-Term Support Waiver Program	Recertification Due Date*	01/31/2020
County of Residence	Dane	Recertification Completion Date	
County of Responsibility*	13 Dane	Suspension Effective Date*	
Start Reason*	New Enrollment	Suspension End Date*	
Stop Reason	Suspended		

At the bottom right, there is a checkbox labeled 'Suspend Enrollment Record' which is currently unchecked. At the bottom of the panel are 'Previous' and 'Exit' buttons.

Figure 44 Waiver Enrollment Panel

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

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, refer to [Chapter 6: Adding a New Enrollment for a Member](#).

7. The Stop Reason field will remain defaulted to "Suspended" unless changed.

Note: Changing the stop reason may result in a notification being generated and sent to the member. If the member's enrollment is being ended for any reason other than a suspension, exit this panel and refer to [Chapter 8: Ending a Member's Enrollment](#).

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

Waiver Program	Waiver Agency	Monthly Parental Fee	Effective Date	End Date
CLTS	BUFFALO - DEPT OF HEALTH & HUMAN SERVICES	\$0.00	01/01/2019	11/30/2019

Monthly Parental Fees

Monthly Parental Fee* x Effective Date* End Date*

Add Cancel

Previous Next Exit

Figure 45 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 a new parental fee segment to the enrollment record, perform the following steps:

- a. Enter the dollar amount in the Monthly Parental Fee field.

Note: It is acceptable to enter **\$0** in this field.

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

- d. 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 segment 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. Click **Next**. The Waiver Enrollment Summary panel will be displayed.

The screenshot shows the "Waiver Enrollment Summary" panel with the following fields and values:

Field	Value
Member ID	9876543210
Member Name	IMA MEMBER
Waiver Program	Children's Long-Term Support Wa
County of Residence	Dane
County Of Responsibility	Dane
LOC Effective Date	10/03/2018
LOC End Date	10/31/2019
Waiver Enrollment Effective Date	01/01/2019
Waiver Enrollment End Date	01/14/2019
Recertification Due Date	01/31/2020
Individual Service Plan Completion Date	
Monthly Parental Fee	\$1.00
Start Reason	New Enrollment
Stop Reason	Suspended
Suspension Effective Date	01/15/2019
Suspension End Date	02/01/2019

At the bottom of the panel are three buttons: "Previous", "Submit", and "Exit".

Figure 46 Waiver Enrollment Summary Panel

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.

12. 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 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. Users should review the enrollment record for the changes that have been made.

The Confirmation panel will be displayed.

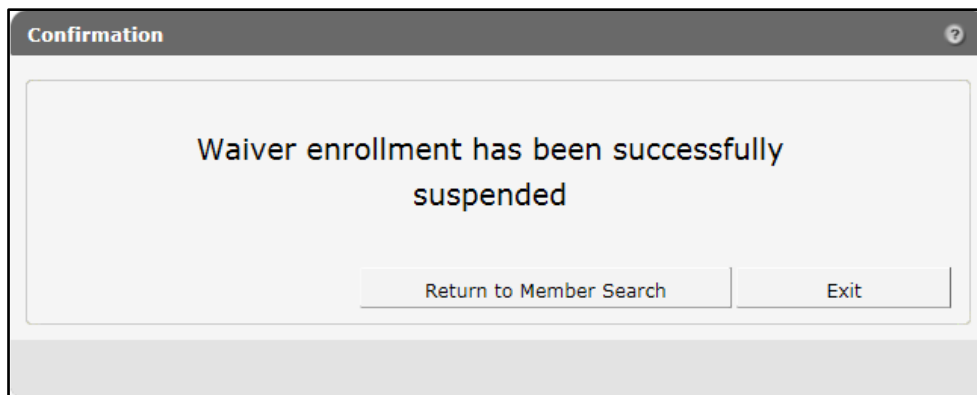


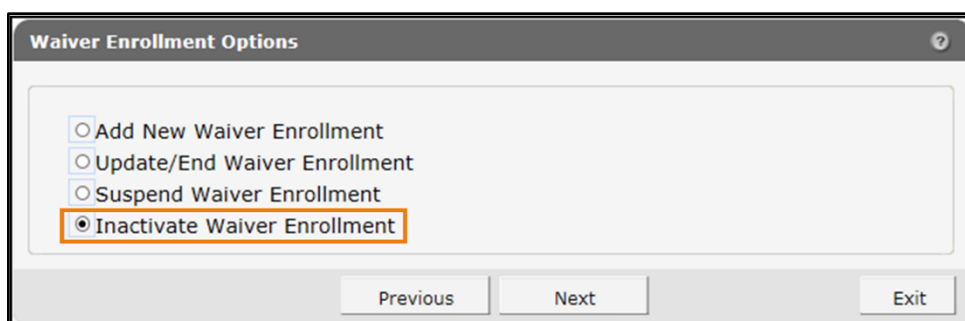
Figure 47 Confirmation Panel

13. Click **Return to Member Search** to return to the Member Search panel to begin any other enrollment tasks.
14. Click **Exit** to return to the secure Waiver Agency page.

10 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 8: Ending a Member's Enrollment](#). If the enrollment needs to be suspended, refer to the instructions in [Chapter 9: Suspending a Member's Enrollment](#).

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

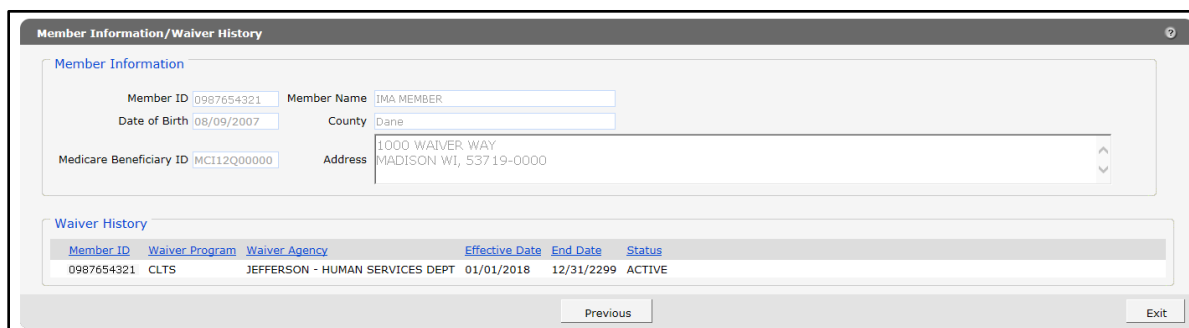


The image shows a software window titled "Waiver Enrollment Options". It contains four radio button options: "Add New Waiver Enrollment", "Update/End Waiver Enrollment", "Suspend Waiver Enrollment", and "Inactivate Waiver Enrollment". The "Inactivate Waiver Enrollment" option is selected and highlighted with an orange rectangular border. At the bottom of the window are three buttons: "Previous", "Next", and "Exit".

Figure 48 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.



The image shows a software window titled "Member Information/Waiver History". It is divided into two main sections: "Member Information" and "Waiver History".

Member Information: This section contains several text input fields with pre-filled data:

- Member ID: 0987654321
- Member Name: JMA MEMBER
- Date of Birth: 08/09/2007
- County: Dane
- Medicare Beneficiary ID: MCI12Q00000
- Address: 1000 WAIVER WAY, MADISON WI, 53719-0000

Waiver History: This section displays a table of waiver records.

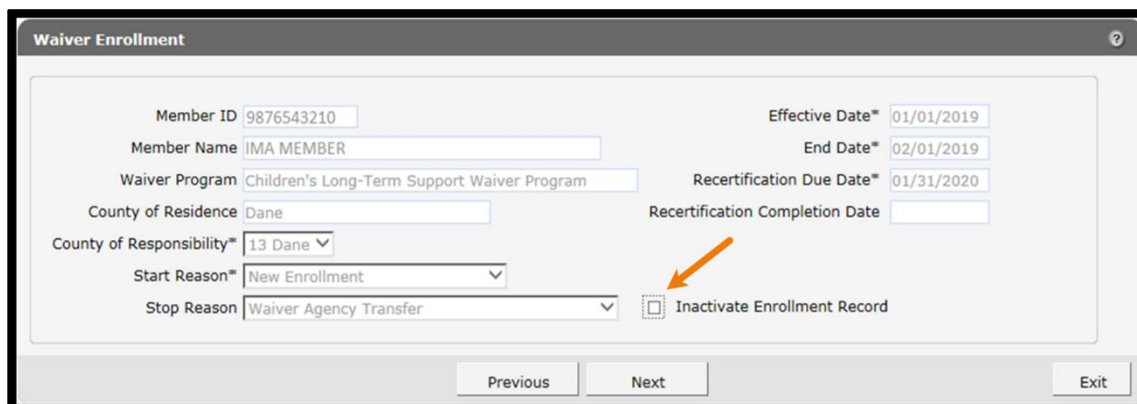
Member ID	Waiver Program	Waiver Agency	Effective Date	End Date	Status
0987654321	CLTS	JEFFERSON - HUMAN SERVICES DEPT	01/01/2018	12/31/2299	ACTIVE

At the bottom of the window are two buttons: "Previous" and "Exit".

Figure 49 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.



The screenshot shows the 'Waiver Enrollment' panel with the following fields:

- Member ID: 9876543210
- Member Name: IMA MEMBER
- Waiver Program: Children's Long-Term Support Waiver Program
- County of Residence: Dane
- County of Responsibility: 13 Dane
- Start Reason: New Enrollment
- Stop Reason: Waiver Agency Transfer
- Effective Date: 01/01/2019
- End Date: 02/01/2019
- Recertification Due Date: 01/31/2020
- Recertification Completion Date: (empty)
- ☐ Inactivate Enrollment Record (indicated by an orange arrow)

Buttons at the bottom: Previous, Next, Exit.

Figure 50 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**.

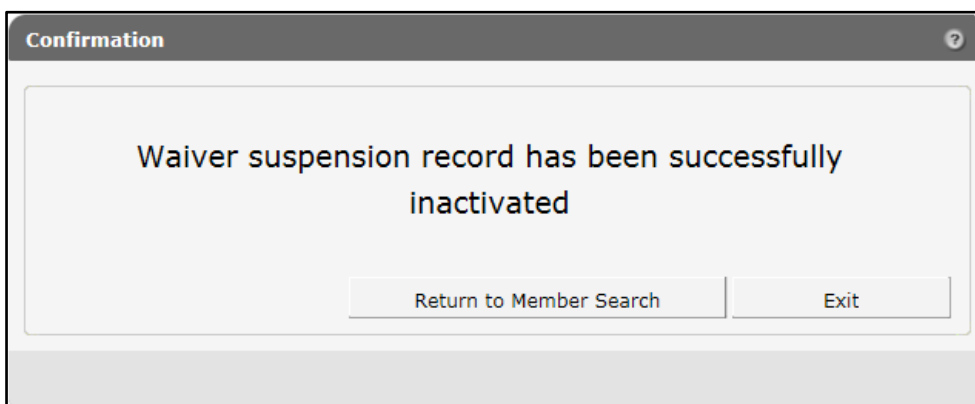
Note: Inactivation is permanent. A record that has been inactivated cannot be recovered or edited.

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. Users should review the enrollment record for the changes that have been made.

The Confirmation panel will be displayed.



The screenshot shows the 'Confirmation' panel with the following text and buttons:

Waiver suspension record has been successfully inactivated

Buttons: Return to Member Search, Exit

Figure 51 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.

11 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** under Quick Links.

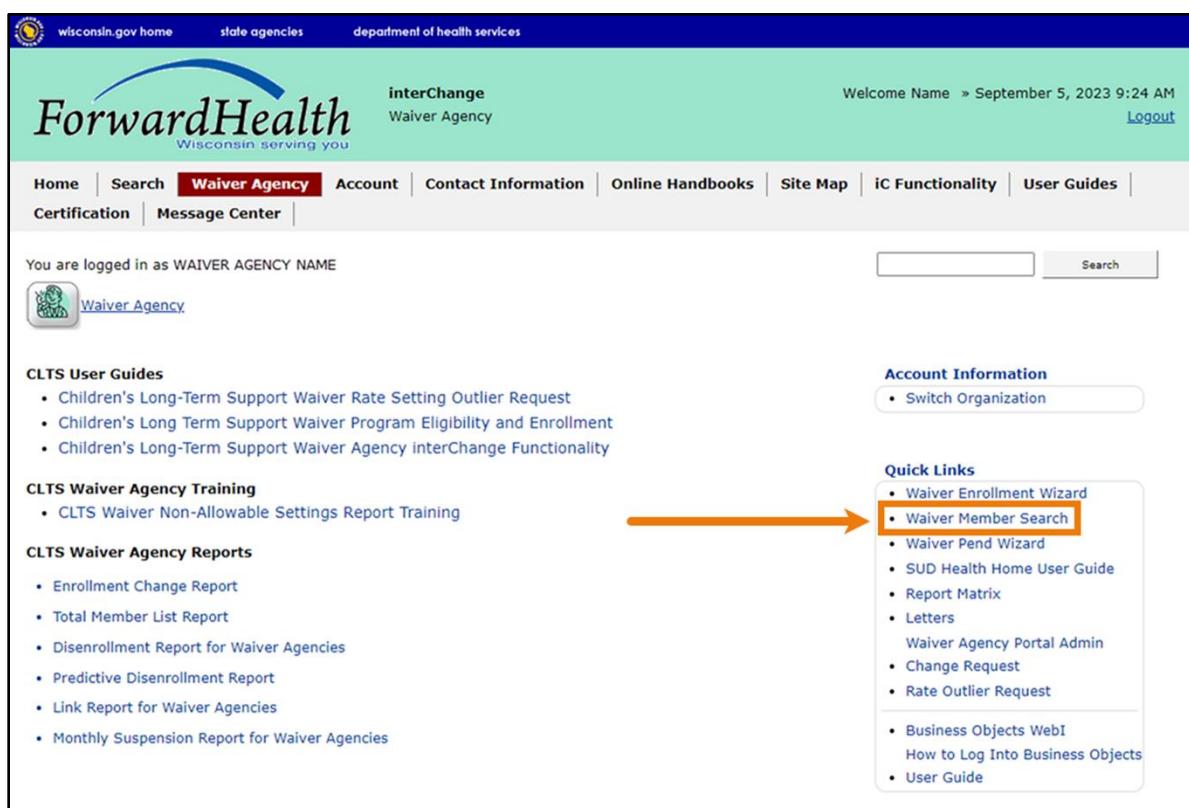
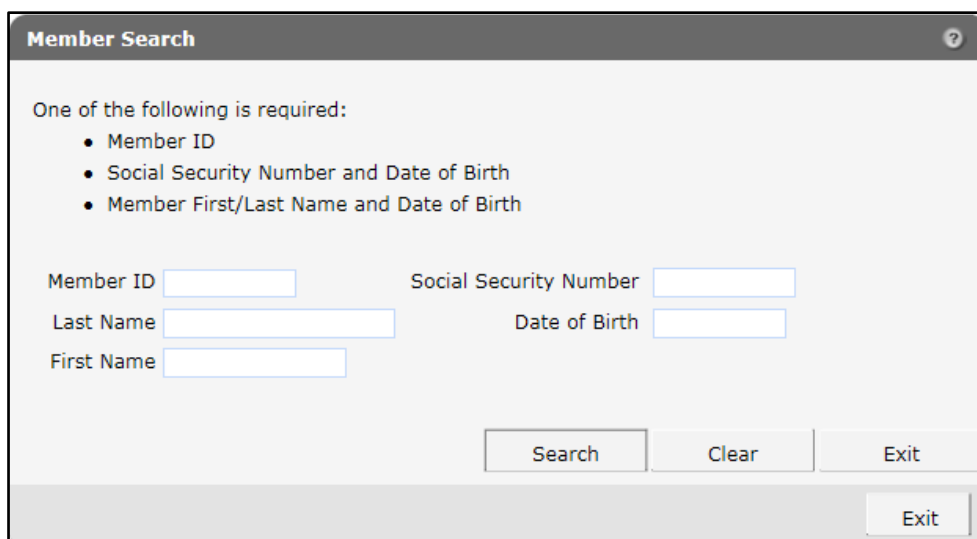


Figure 52 Secure Waiver Agency Page

2. The Member Search panel will be displayed.



Member Search

One of the following is required:

- Member ID
- Social Security Number and Date of Birth
- Member First/Last Name and Date of Birth

Member ID Social Security Number

Last Name Date of Birth

First Name

Figure 53 Member Search Panel

3. 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 Social Security number (SSN) and date of birth (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. Users should review the enrollment record for the changes that have been made.

Once a one-to-one match has been found, the “Search Results” section will be displayed.

Member Search

One of the following is required:

- Member ID
- Social Security Number and Date of Birth
- Member First/Last Name and Date of Birth

Member ID: 0987654321 Social Security Number:

Last Name: Date of Birth:

First Name:

Search Results

Member Information

Member ID: 0987654321 Name: IMA MEMBER

Date of Birth: 12/27/2005 County: Dane

Medicare Beneficiary ID: DDDDDDDDDDD Address: 123 MAIN ST
MADISON WI, 53718-0000

Benefit Plan

Benefit Plan	Effective Date	End Date
Medicaid Purchase Plan	08/01/2017	12/31/2299

MCO Enrollment History

*** No rows found ***

LOC - Adult

*** No rows found ***

LOC - Children's

Waiver Program	Eligibility	Target Groups	Effective Date	End Date
CLTS	ELG	DD1	01/01/2018	01/31/2019

Waiver History

Waiver Program	Waiver Agency	Effective Date	End Date	Status
CLTS	DANE - DEPT OF HUMAN SERVICES	01/01/2018	07/31/2018	ACTIVE
CLTS	DANE - DEPT OF HUMAN SERVICES	10/01/2018	10/31/2018	ACTIVE
CLTS	DANE - DEPT OF HUMAN SERVICES	08/01/2018	09/30/2018	SUSPENDED

Figure 54 Member Search Panel With “Search Results” Section

The “Search Results” section displays the member’s information, including demographics, benefit plans, LOC, and all active and suspended enrollment records for the user’s Waiver Agency.

4. Click **Exit** to return to the secure Waiver Agency page.

12 Reporting

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

12.1 OnBase Reports

1. On the Secure Waiver Agency page, links to the reports are available under the CLTS Waiver Agency Reports heading.

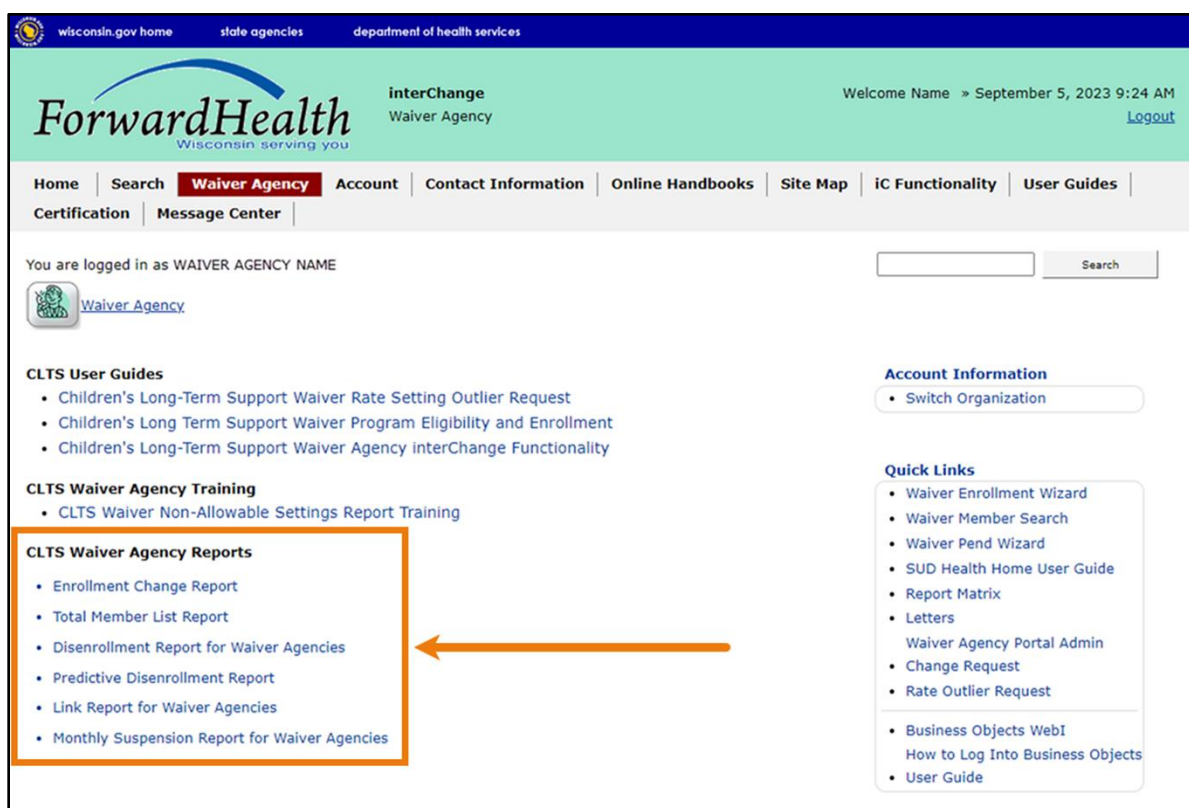


Figure 55 Secure Waiver Agency Page

Note: If the report links do not appear on the Secure Waiver Agency page, the user does not have the correct security roles to access this functionality. If this user should have access and does not, the user should contact their waiver agency administrator.

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 new enrollment, 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 scheduled 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 overdue annual functional screen/level of care determination, losing function eligibility, or having a program recertification due date that falls within the reporting period.
- **Link Report for Waiver Agencies**—This monthly 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.
- **Monthly Suspension Report for Waiver Agencies**—This monthly report displays members with suspended waiver enrollment during the previous calendar month or members that have had retroactive suspension added or updated during the previous calendar month.

2. Click the report to be viewed. The OnBase document viewer will open, and a file download window will be displayed.

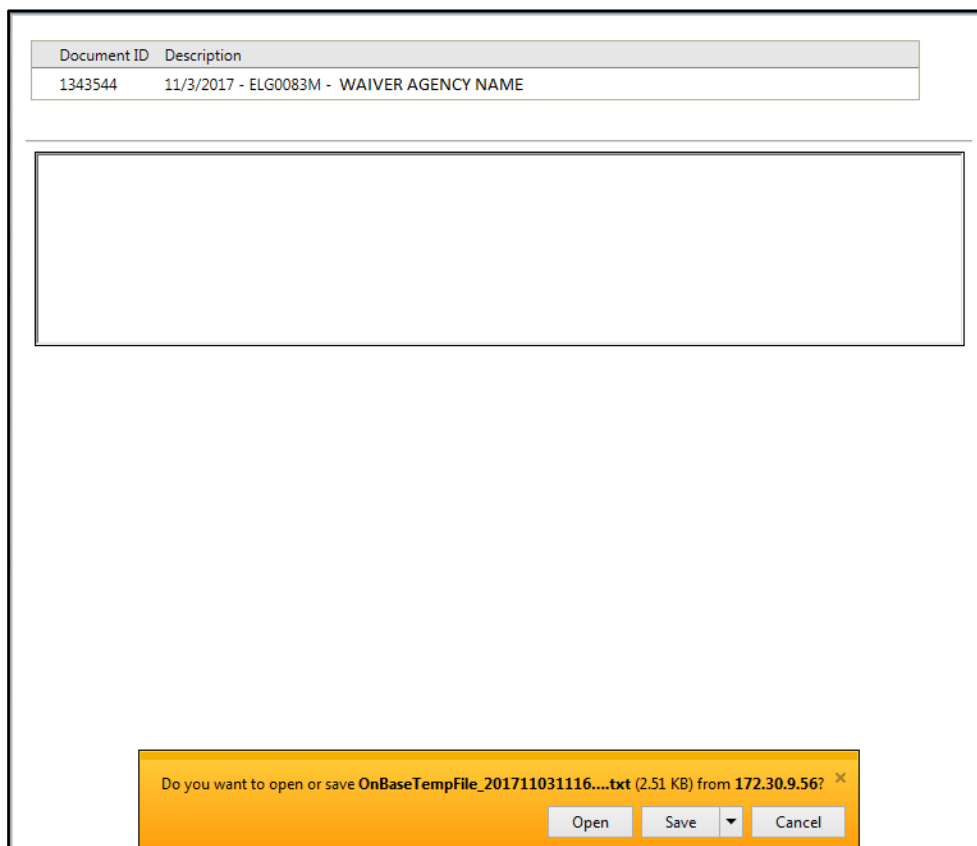


Figure 56 File Download Window

3. Click Open. The report will be displayed in the OnBase document viewer. From here, the report may be printed, or the data may be copied and pasted into an Excel document.

12.2 Business Objects Web Intelligence Reports

SAP BusinessObjects is a web browser tool that allows the user to perform analysis, produce formatted reports, and distribute the reports. Users can access Business Objects, also called InfoView or Waiver Web Intelligence (Webi), via the waiver agency page. Business Objects is the business intelligence tool set used to access data and reports that originate from the long-term care (LTCare) Data Warehouse, rather than the interChange Medicaid Management Information System (MMIS) or interChange system directly.

12.2.1 Requesting Access to Business Objects

Waiver agency administrators can request Business Objects access for users in their waiver agency and assign appropriate security roles for users including the Webi Reports role that allows users to access reports. Requests for access to Business Objects are submitted by the administrator via the Portal. After the administrator completes the request, an email will be automatically generated to the appropriate help desk stating there are access requests in

progress. After the access request has been approved by the help desk, the user will be granted access and sent an email confirming access. Refer to [13.1 Requesting DSS Universe Access](#) for information regarding Decisions Support System (DSS) Universe access.

For assistance with requesting access, creating or modifying queries, working with reports, errors, and connectivity, contact the Long-Term Care Data Warehouse (LTC DW) Help Desk at VDXCLTCDWHelp@wisconsin.gov.

12.2.2 Available Reports

CLTS users can access public reports that are available in the [CLTS DW External CWA Reports folder](#). DHS posts reports to this folder that can be used by external CWAs to share within their organization. DHS also creates template reports for external CWAs to download to their report folder and run. Every external CWA submitting LTC data can access their data via Business Objects and utilize the reports folder. Note: CLTS users can request access to more than just the CLTS DW External CWA Reports. Refer to [13.3 Adding Universe Access](#) for a list of all the data universes available to CLTS users.

12.2.3 Accessing Business Objects Web Intelligence Reports

1. From the secure Waiver Agency page, click **Business Objects WebI**.

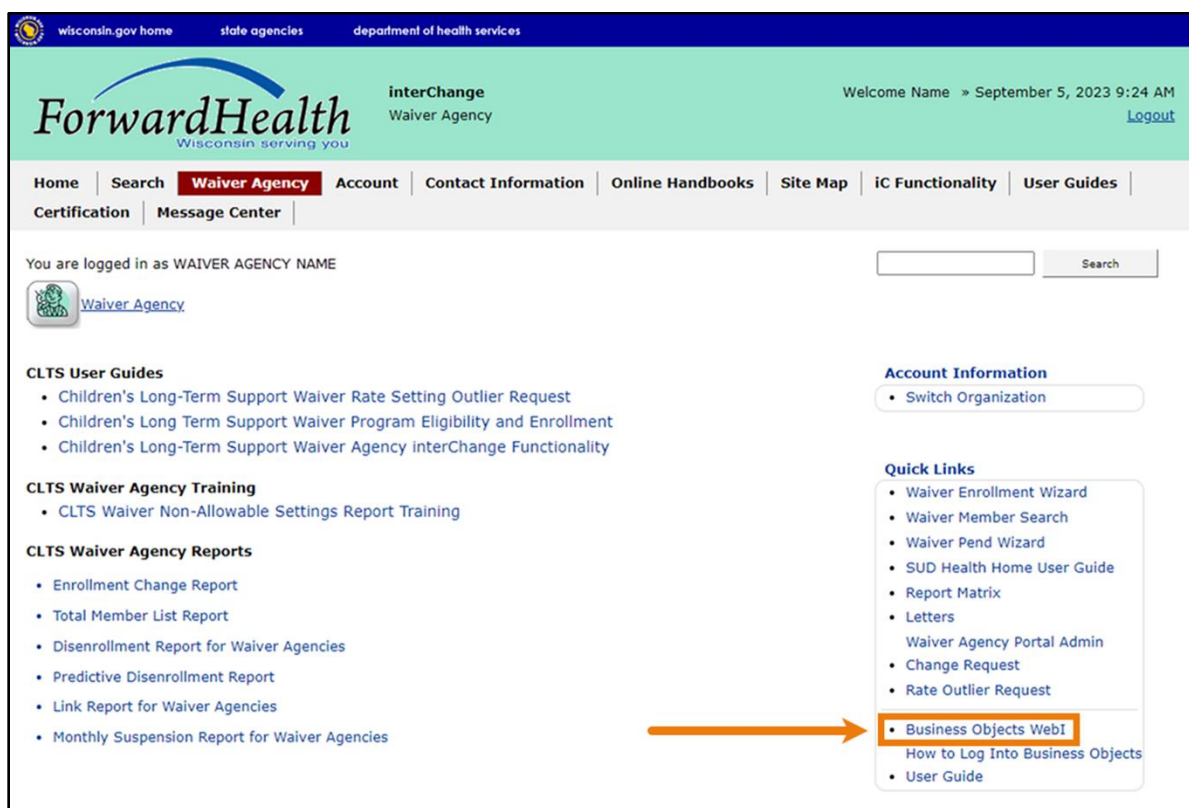


Figure 57 Secure Waiver Agency Page

The Webi home page will be displayed.

wisconsin.gov home state agencies subject directory department of health services

ForwardHealth
Wisconsin serving you

interChange
Waiver Agency

Welcome Waiver Agency Name » November 9, 2017 2:49 PM
[Logout](#)

Home | Search | **Waiver Agency** | Account | Contact Information | Online Handbooks | Site Map

iC Functionality | User Guides | Certification

You are logged in as WAIVER AGENCY NAME

[Webi Home](#)

Reporting

The link below will take you to the Business Objects Web Intelligence reporting tool. You will need to have a login id and password to access this site.

- [Business Objects \(link to WEBI\)](#)

Confidentiality Agreement

User agrees to take certain precautions, comply with certain practices, and implement certain procedures required by applicable law for the purposes of guarding data integrity and safeguarding the confidentiality of Protected Health Information, all as more specifically set forth in this [Agreement](#).

User agrees not to use or further disclose the Protected Health Information in a manner that, if undertaken by DHS, would violate the requirements of the Privacy Regulations.

User agrees to use appropriate safeguards that are sufficient to prevent any use or disclosure of the Protected Health Information obtained under this Agreement that is not permitted or provided for by this Agreement.

I will review the sections of the following [Agreement](#).

[About](#) | [Contact](#) | [Disclaimer](#) | [Privacy Notice](#)

Wisconsin Department of Health Services


UAT UAT_WIPortal2_M613B
Session expires in: 00:27:48

Figure 58 Webi Home Page

Note: If the Business Objects Webi link does not appear on the Secure Waiver Agency page, the user does not have the correct security roles to access this functionality. If this user should have access and does not, the user should contact their waiver agency administrator.

2. Review the Confidentiality Agreement.

3. Click **Business Objects (link to WEBI)**. The user will be directed to SAP BusinessObjects login page. The Logging In to Business Objects User Guide is also available to users. Users can access the user guide by clicking the How to Log in to Business Objects User Guide link under Quick Links on the secure Waiver Agency page.




The image shows the SAP BusinessObjects BI launch pad login page. At the top, it says "SAP BusinessObjects BI launch pad". Below this, it instructs the user to "Enter your user information, and click 'Log On'." and provides a link to contact the system administrator if unsure. The login form includes fields for "User Name:", "Password:", and "Authentication:" (set to "LDAP"). A "Log On" button is present. The SAP logo and a "Help" link are at the bottom of the form. Below the form is a "NOTICE TO USERS" section with a disclaimer about system ownership and usage, followed by a consent statement and a "LOG OFF IMMEDIATELY" instruction.

SAP BusinessObjects
BI launch pad

Enter your user information, and click "Log On".
If you are unsure of your account information, contact your system administrator.

User Name:
Password:
Authentication:

 [Help](#)

=====

NOTICE TO USERS

This computer system is the private property of its owner, whether individual, corporate or government. It is for authorized use only. Users (authorized or unauthorized) have no explicit or implicit expectation of privacy.

Any or all uses of this system and all files on this system may be intercepted, monitored, recorded, copied, audited, inspected, and disclosed to your employer, to authorized site, government, and law enforcement personnel, as well as authorized officials of government agencies, both domestic and foreign.

By using this system, the user consents to such interception, monitoring, recording, copying, auditing, inspection, and disclosure at the discretion of such personnel or officials. Unauthorized or improper use of this system may result in civil and criminal penalties and administrative or disciplinary action, as appropriate. By continuing to use this system you indicate your awareness of and consent to these terms and conditions of use. LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.

=====

Figure 59 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 may not be the same as the ID and password used to access the Portal.

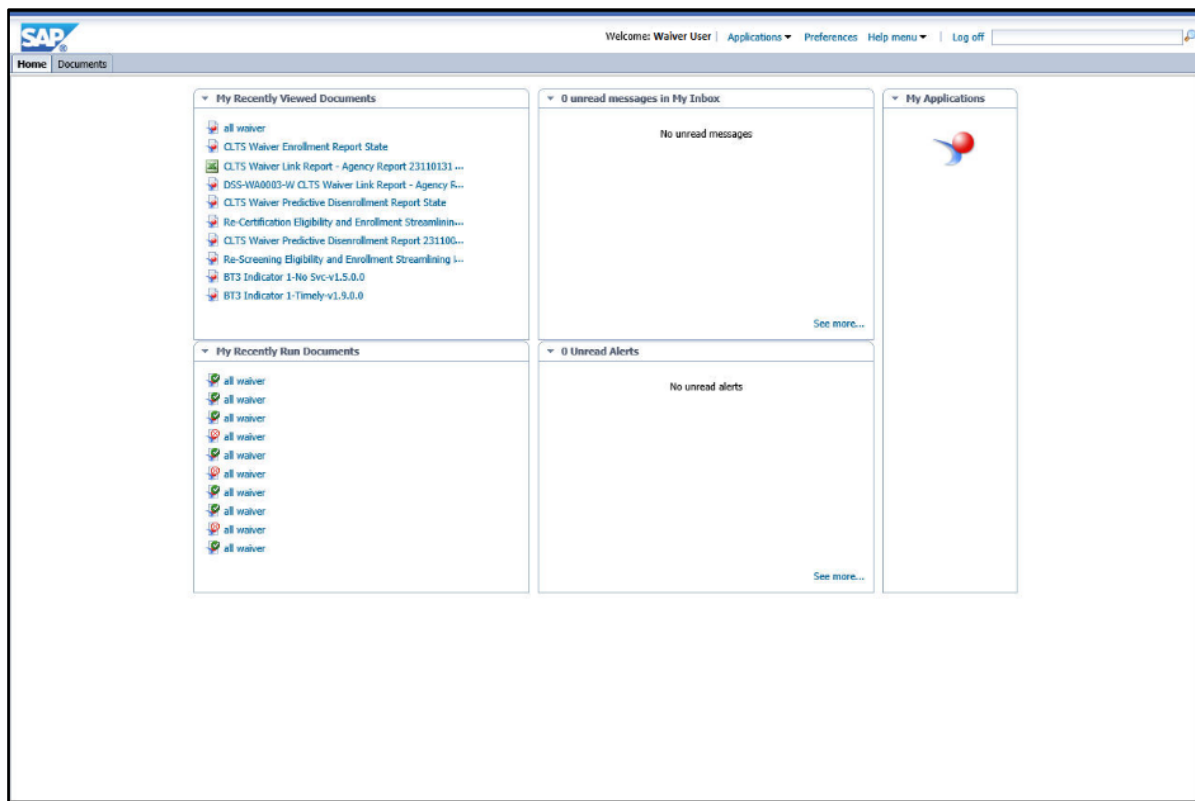


Figure 60 SAP BusinessObjects Home Tab

5. Click the **Documents** tab in the upper left of the screen.

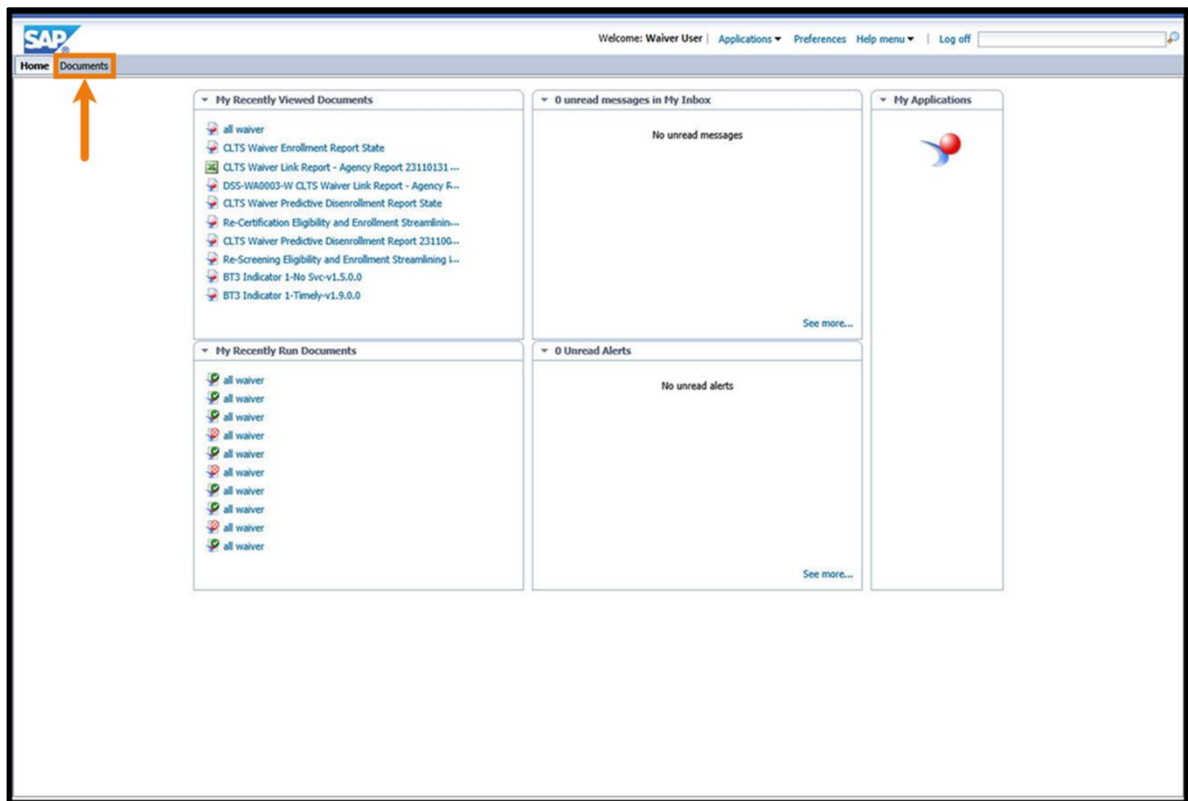


Figure 61 SAP BusinessObjects Home Tab

6. The Documents page will be displayed. Click **Folders** in the lower left of the screen.

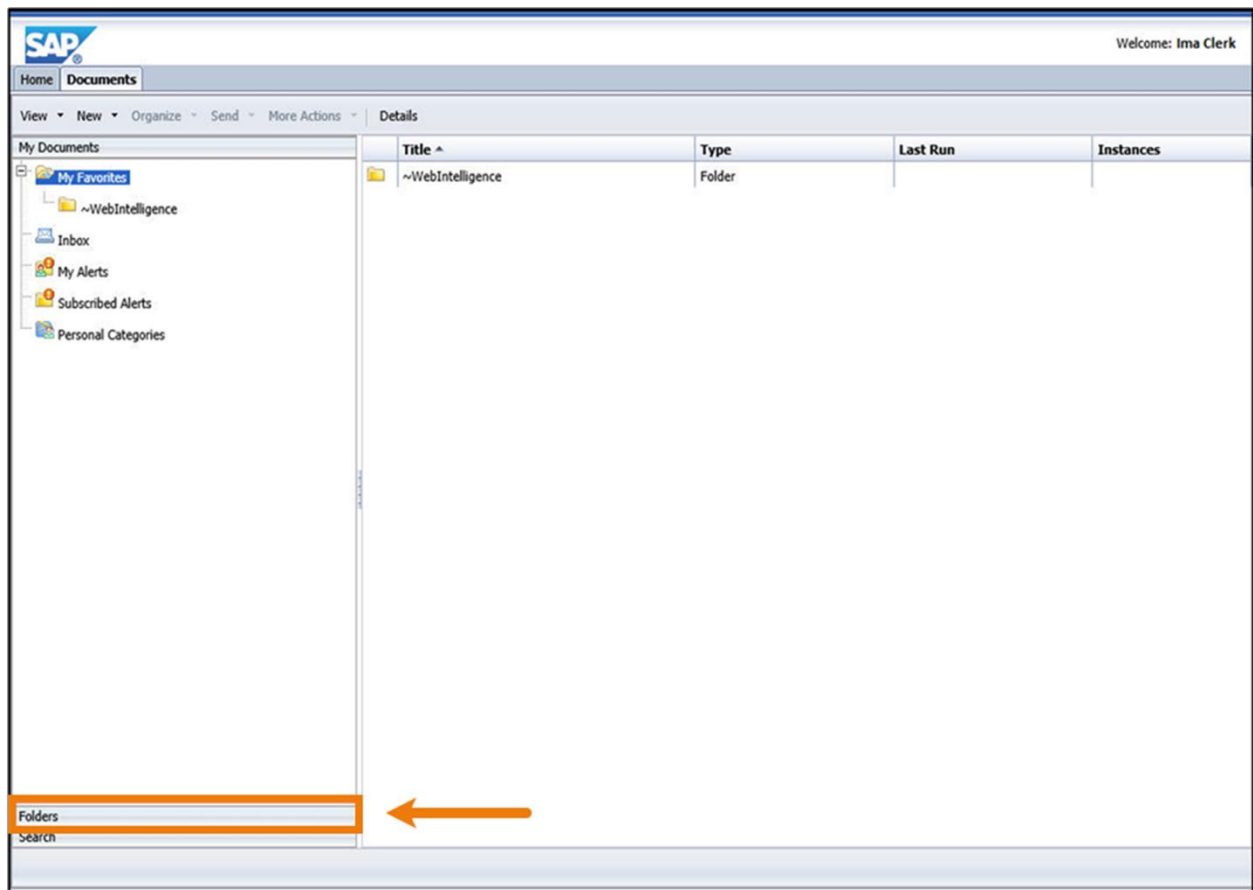


Figure 62 SAP BusinessObjects Documents Tab

The Folders menu will be displayed.

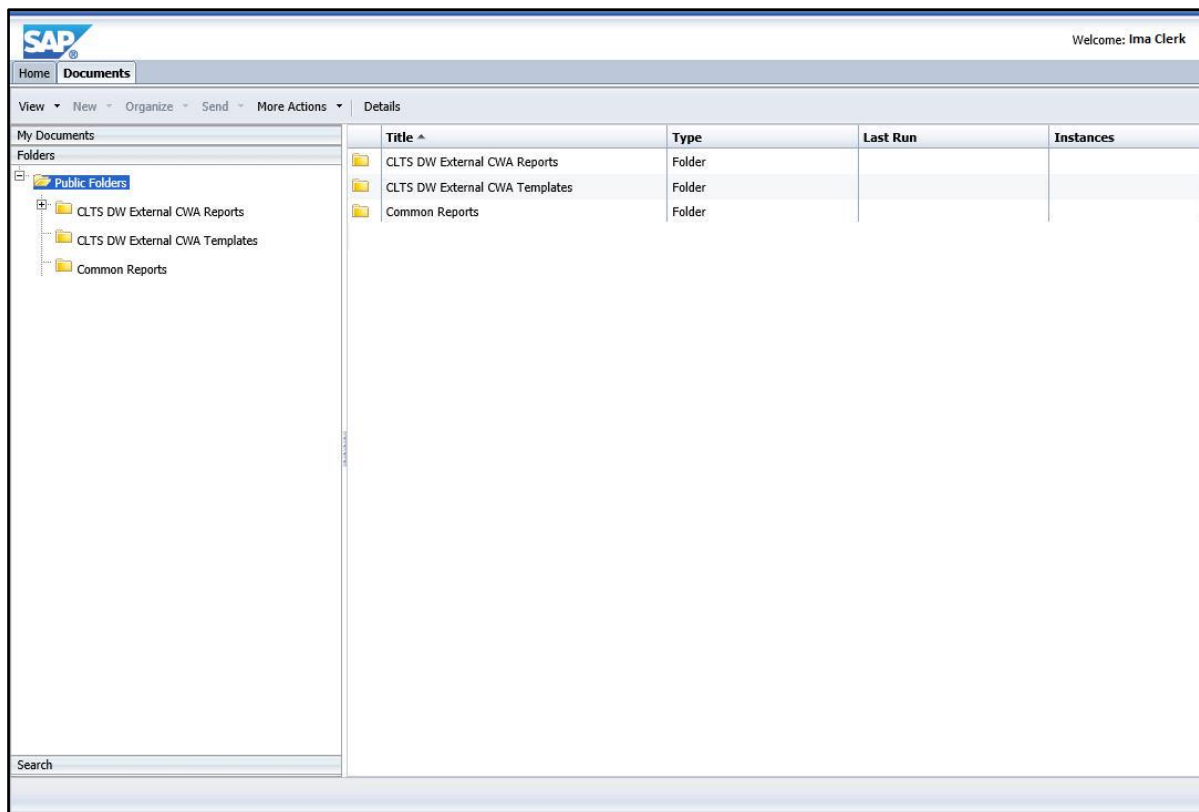


Figure 63 SAP BusinessObjects Folders Menu

12.2.4 Accessing 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 or counties. Select the appropriate county folder.

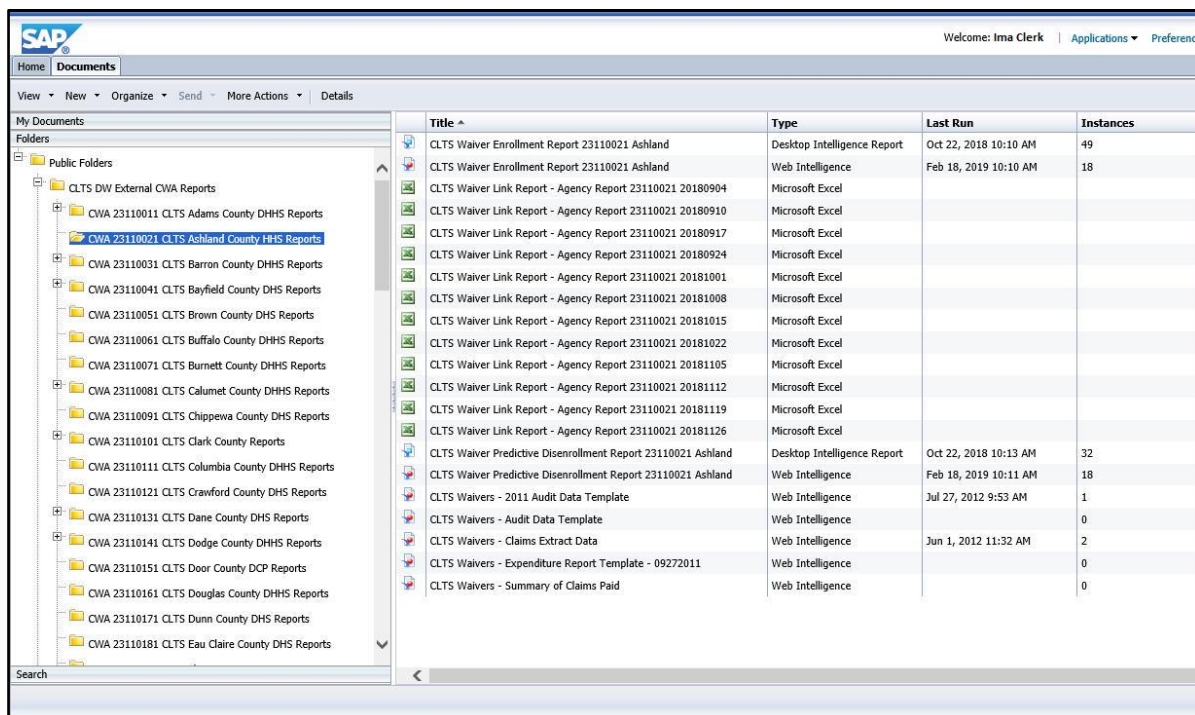


Figure 64 Public County Folders

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.

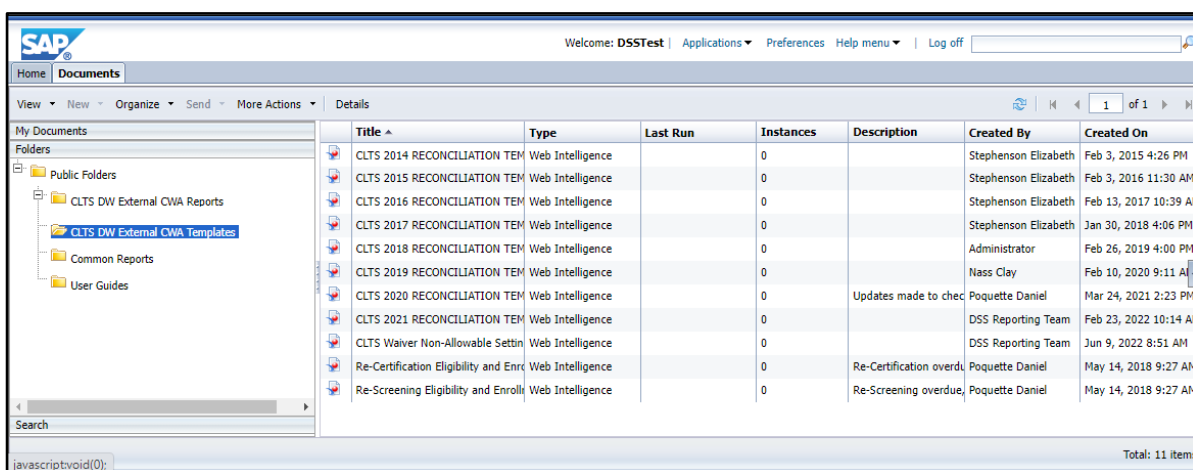
To view a report, double-click the desired report. The report will open in the browser if it is a Web Intelligence or Desktop intelligence Report, or open in Excel if it is a Microsoft Excel file.

Refer to the [Working With Reports in Business Objects section](#) for information related to creating, saving, exporting, refreshing, and sending reports.

12.2.5 Accessing 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**.



Title	Type	Last Run	Instances	Description	Created By	Created On
CLTS 2014 RECONCILIATION TEM	Web Intelligence		0		Stephenson Elizabeth	Feb 3, 2015 4:26 PM
CLTS 2015 RECONCILIATION TEM	Web Intelligence		0		Stephenson Elizabeth	Feb 3, 2016 11:30 AM
CLTS 2016 RECONCILIATION TEM	Web Intelligence		0		Stephenson Elizabeth	Feb 13, 2017 10:39 AM
CLTS 2017 RECONCILIATION TEM	Web Intelligence		0		Stephenson Elizabeth	Jan 30, 2018 4:06 PM
CLTS 2018 RECONCILIATION TEM	Web Intelligence		0		Administrator	Feb 26, 2019 4:00 PM
CLTS 2019 RECONCILIATION TEM	Web Intelligence		0		Nass Clay	Feb 10, 2020 9:11 AM
CLTS 2020 RECONCILIATION TEM	Web Intelligence		0	Updates made to chec	Poquette Daniel	Mar 24, 2021 2:23 PM
CLTS 2021 RECONCILIATION TEM	Web Intelligence		0		DSS Reporting Team	Feb 23, 2022 10:14 AM
CLTS Waiver Non-Allowable Sett	Web Intelligence		0		DSS Reporting Team	Jun 9, 2022 8:51 AM
Re-Certification Eligibility and Enr	Web Intelligence		0	Re-Certification overdue	Poquette Daniel	May 14, 2018 9:27 AM
Re-Screening Eligibility and Enroll	Web Intelligence		0	Re-Screening overdue	Poquette Daniel	May 14, 2018 9:27 AM

Figure 65 CLTS DW External CWA Templates Folder

The following report templates are available:

- **Re-Screening 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 planning for recertifications, transitions, and disenrollments.
- **CLTS Waiver Non-Allowable Settings Report**—This report identifies CLTS Waiver Program-enrolled participants that may have been residing in a non-allowable setting based on Medicaid claim data. The report data will assist CWAs in determining if claims were paid for dates when the participant may have been residing in a non-allowable setting.

2. To copy a template to the user's inbox, select the desired file.

3. Select **Send** and then click **BI Inbox**. The Send menu will be displayed.

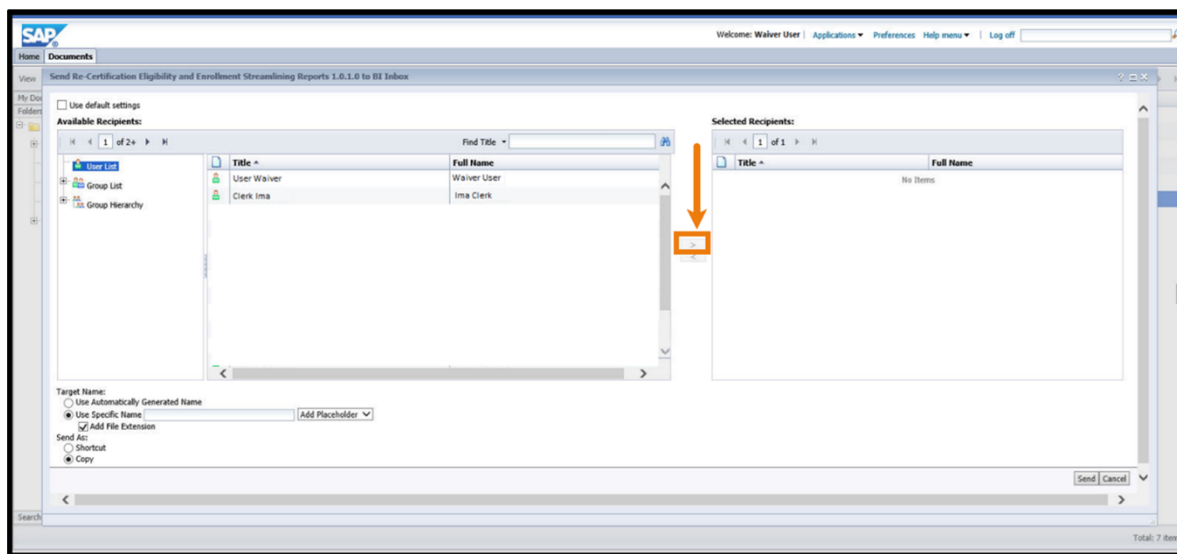



Figure 66 SAP BusinessObjects Send Menu

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.

Accessing the CLTS Waiver Non-Allowable Settings Report Template

The CLTS Waiver Non-Allowable Settings Report template is designed to provide CWAs with a tool to help them determine if an enrolled participant may have had CLTS claims paid while the participant was residing in a non-allowable setting. The report looks at all CLTS participants with both active and suspended enrollment and identifies instances where CLTS claims have been paid that overlap with Medicaid claims, which indicate that the child was residing in a non-allowable setting for more than one day.

The data refreshes monthly and is available for report refresh on the first Tuesday of each month. The report is available to users on demand and data is available from the previous 24 months.

1. After selecting the **CLTS DW External CWA Templates** folder, locate the CLTS Waiver Non-Allowable Settings Report Template. Before running the report, the user will need to copy and paste the report template into their CLTS agency report folder.

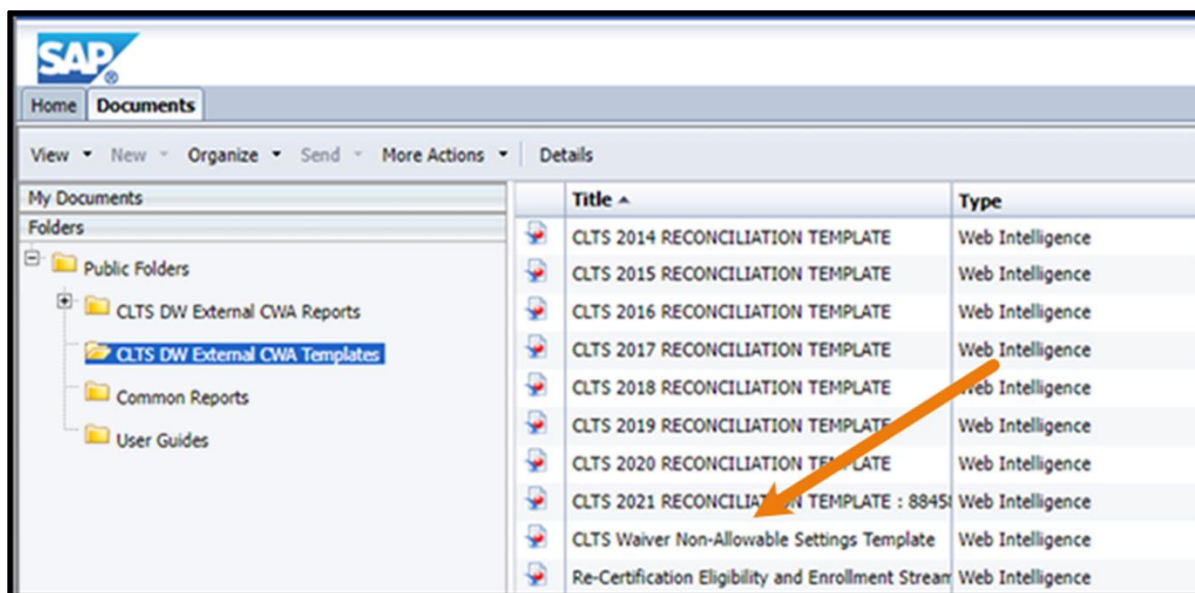


Figure 67 CLTS Waiver Non Allowable Settings Template

2. Right-click on the report to display the drop-down menu. Hover the cursor over **Organize** and select **Copy** to copy the report.

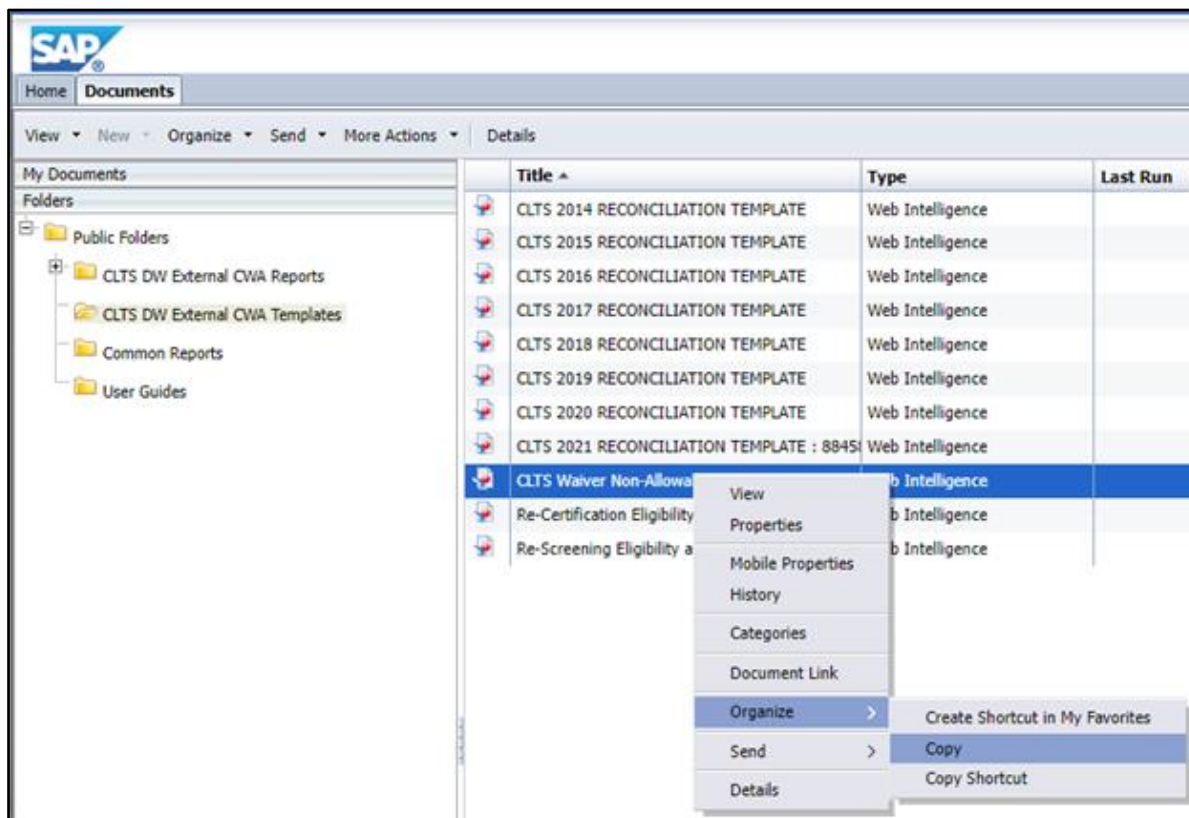


Figure 68 CLTS DW External CWA Templates Folder

3. Select the CLTS agency folder and right-click to display the drop-down menu. Select Organize and Paste to place the report into the folder.

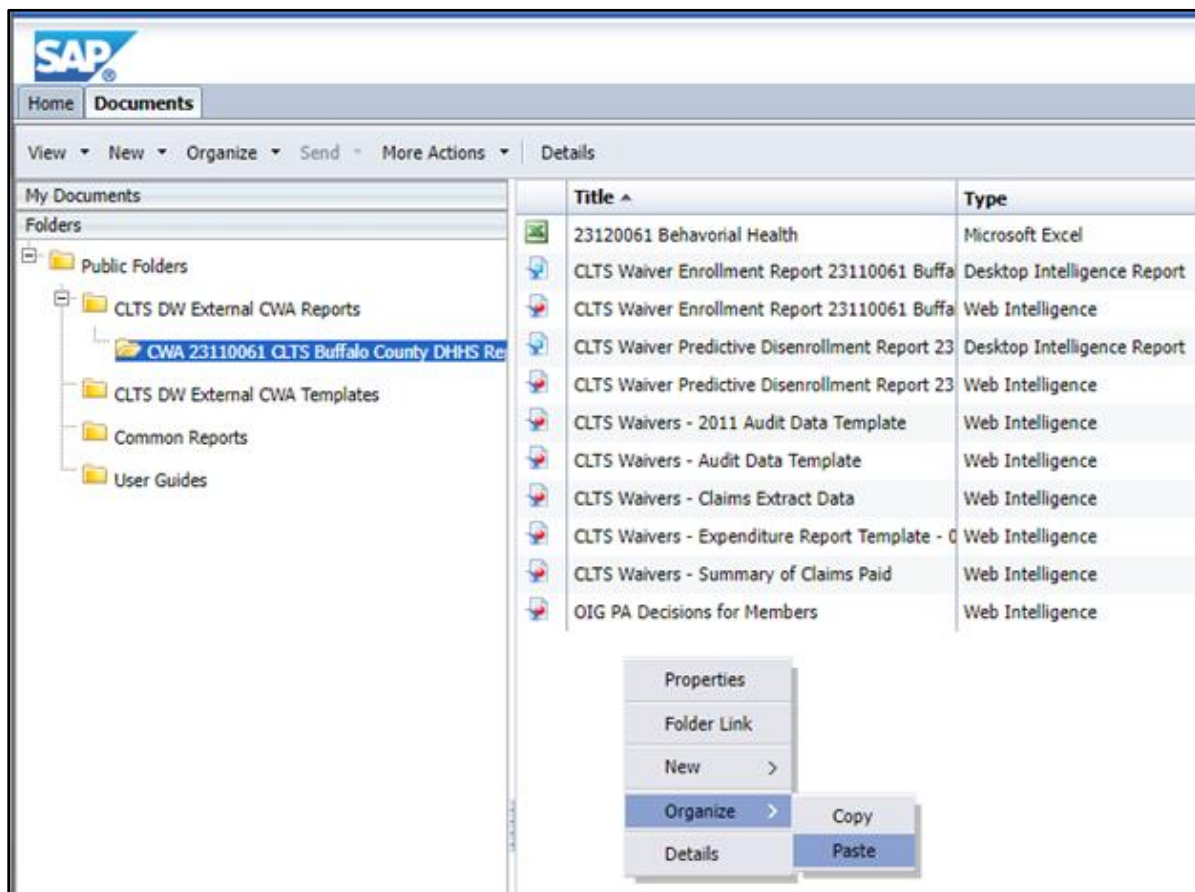


Figure 69 CLTS Agency Folder

4. The report will now be located within the agency's reports folder. Double-click on the report title to open the report.

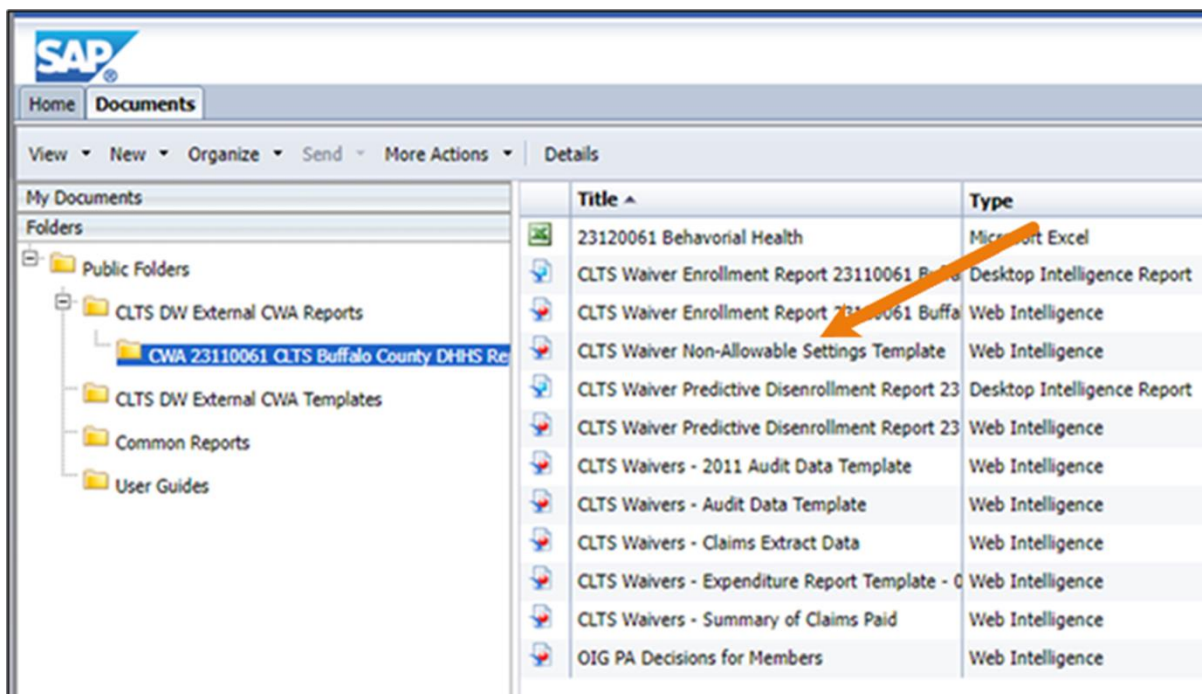


Figure 70 CLTS Agency Folder

The report will launch within the web browser and initially contain no data.

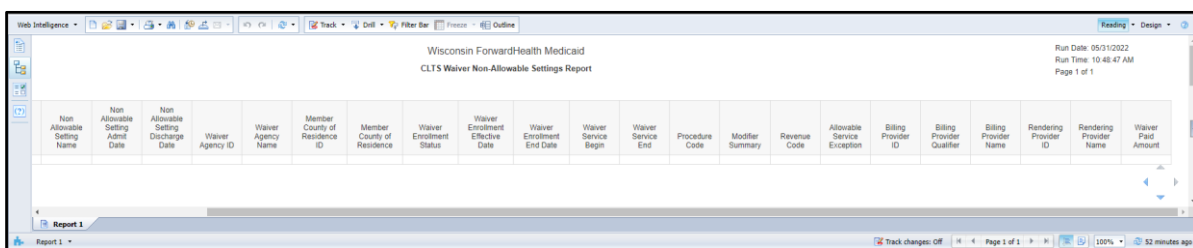


Figure 71 CLTS Waiver Non-Allowable Settings Report Template Without Data

- Click the refresh icon. Note: Reports can also be scheduled to refresh at specific times or intervals. Detailed information on how to schedule a report to refresh can be found in the [Working With Reports in Business Objects](#) section.

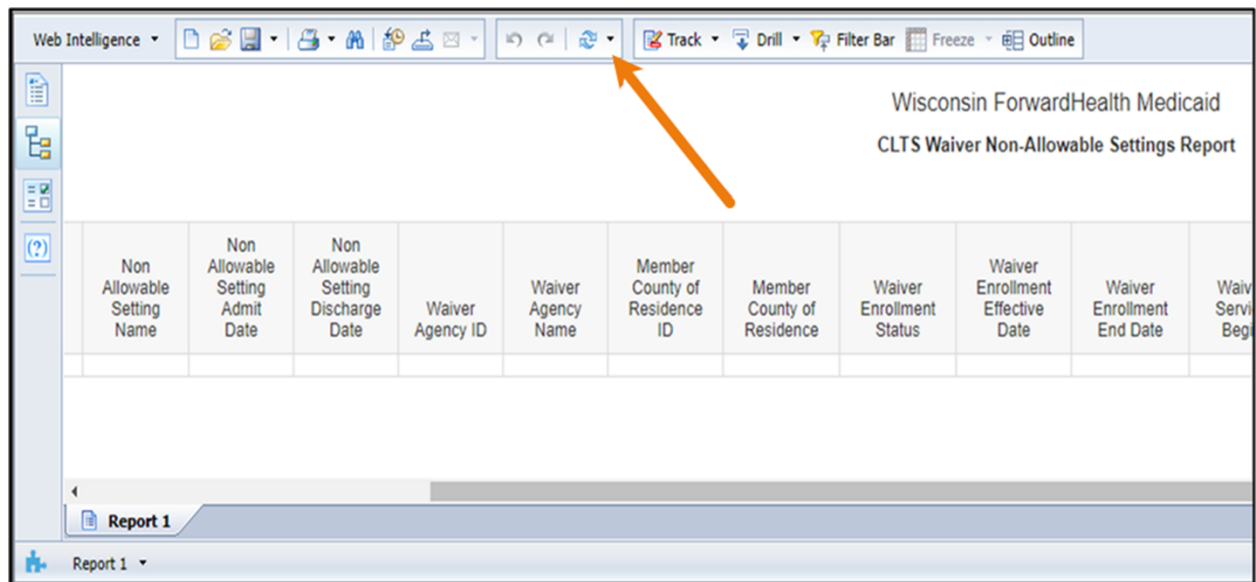


Figure 72 CLTS Waiver Non-Allowable Settings Report Template

- The Prompts summary box will be displayed with a default date range. The user can enter admit and discharge dates by selecting the category from the Prompts Summary on the left and entering the dates for each category by clicking the day on the calendar icon on the right. The user can also enter the dates manually in mm/dd/yyyy format.

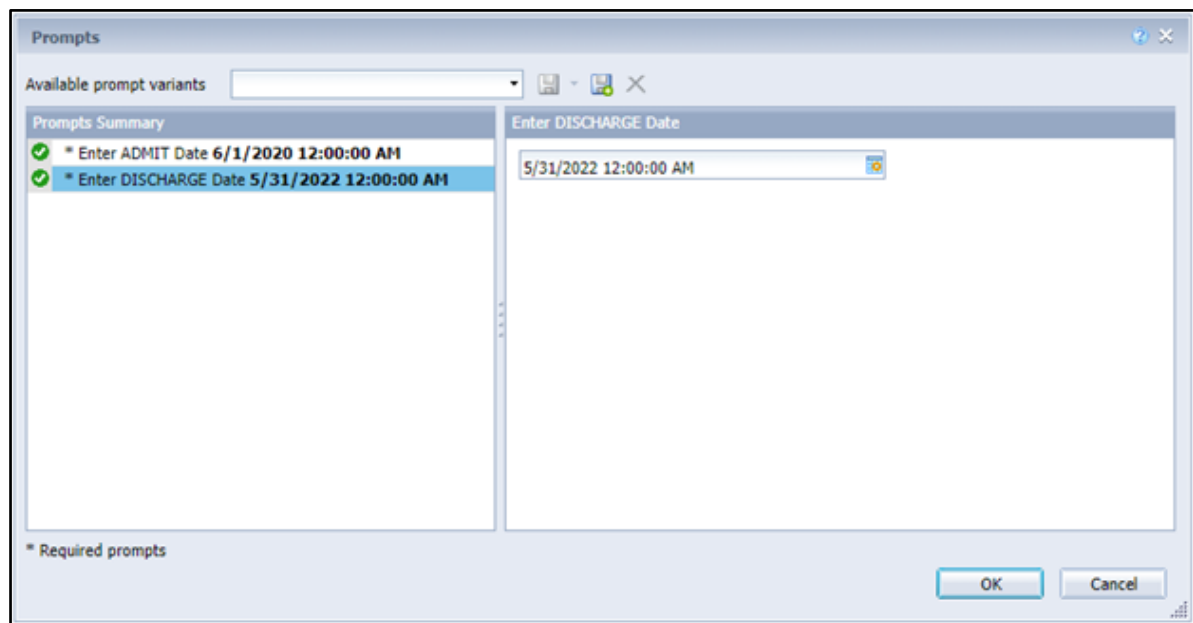


Figure 73 Prompts Summary Box

Note: The discharge and admit dates are from Medicaid claims that indicate a non-allowable setting. The discharge date will be the last day of the month, two calendar months prior to the current month, and the admit date will be the first day of the month, 24 months prior to the discharge date. For example, if the report is run on July 10, 2022, the admit date will be June 1, 2020, and the discharge date will be May 31, 2022. The report may also be refreshed with an alternative date range. The report will pull a maximum of 24 months of data regardless of whether a greater date range was entered.

- Click OK. The report will open in the browser.

Member ID	Last Name	First Name	Non Allowable Setting Type	Non Allowable Setting Name	Non Allowable Setting Admit Date	Non Allowable Setting Discharge Date	Waiver Agency ID	Waiver Agency Name	Member County of Residence	Waiver Status	Waiver Enrollment Status	Waiver Enrollment Effective Date	Waiver Enrollment End Date	Waiver Service Begin	Waiver Service End	Procedure Code	Modifier Summary	Revenue Code	Allowable Service Exception	Billing Provider ID	Billing Provider Name	Billing Provider Qualifier	Billing Provider ID	Billing Provider Name	Billing Provider Qualifier	Waiver Paid Amount
080000000	PREMER	INA	HOSPITAL	MILWAUKEE	2021-06-23	2021-06-30	00010000	OZAUKEE	45	Cosalee	ACTIVE	2018-06-08	2299-12-31	2021-06-27	2021-06-30	T1005	N22	NA		123456789	INA	EN	A. PROVIDER	123456789	A. PROVIDER	1,230
120456789	PREMER	INA	HOSPITAL	MILWAUKEE	2021-12-14	2021-12-16	00010000	OZAUKEE	45	Cosalee	ACTIVE	2020-09-24	2299-12-31	2021-12-12	2021-12-25	99600	INQUN	NA		987654321	INA	EN	A. PROVIDER	987654321	A. PROVIDER	1,230
087654321	PREMER	INA	HOSPITAL	CHILDRENS	2020-06-08	2020-06-10	00010000	OZAUKEE	45	Cosalee	ACTIVE	2018-12-19	2299-12-31	2020-06-01	2020-06-25	T2040	U7320	NA	FINANCIAL N	111111111	INA	EN	A. PROVIDER	111111111	A. PROVIDER	72

Figure 74 CLTS Waiver Non-Allowable Settings Report Template

Data fields for the CLTS Waiver Non-Allowable Settings Report template include the following:

- The *Member ID* field displays the unique identifier for the recipient.
- The *Last Name* field displays the last name of the recipient.
- The *First Name* field displays the first name of the recipient.
- The *Non Allowable Setting Type* field displays any of the following CLTS prohibited living arrangement types:
 - Hospital
 - Skilled nursing facility
- The *Non Allowable Setting Name* field displays any of the following CLTS prohibited living arrangement facility names for:
 - Hospital
 - Skilled nursing facility
- The *Non Allowable Setting Admit Date* field displays the hospital admit date for the hospital or skilled nursing facility.
- The *Non Allowable Setting Discharge Date* field displays the discharge date for the hospital or skilled nursing facility.
- The *Waiver Agency ID* field displays the unique ID that identifies the CWA.
- The *Waiver Agency Name* field displays the name of the CWA.

- The *Member County of Residence ID* field displays the member's county of residence ID.
- The *Member County of Residence* field displays the member's county of residence.
- The *Waiver Enrollment Status* field identifies the current status of waiver enrollment. Values are:
 - o A—Active
 - o S—Suspended
- The *Waiver Enrollment Effective Date* field displays the effective date of the member's waiver enrollment record.
- The *Waiver Enrollment End Date* field displays the end date of the member's waiver enrollment record.
- The *Waiver Service Begin* field displays the first date of service.
- The *Waiver Service End* field displays the last date of service.
- The *Procedure Code* field displays the code used to identify a medical, dental, or disposable medical supply procedure.
- The *Modifier Summary* field displays the code used to further define a procedure provider.
- The *Revenue Code* field identifies a system assigned key used to uniquely identify a revenue code.
- The *Allowable Service Exception* field displays a fee-based service that remains allowable during an institutional stay.
- The *Billing Provider ID* field displays the ID of the billing provider.
- The *Billing Provider Qualifier* field displays the billing provider qualifier.
- The *Billing Provider Name* field displays the name of the billing provider.
- The *Rendering Provider ID* field displays the ID of the rendering provider.
- The *Rendering Provider Name* field displays the name of the rendering provider.
- The *Waiver Paid Amount* field displays the amount paid for services rendered.

12.2.6 Working With Reports in Business Objects

Exporting Templates and Reports

1. To export a template or generate a report from one of these templates, view the report in the browser, and click the Export button.

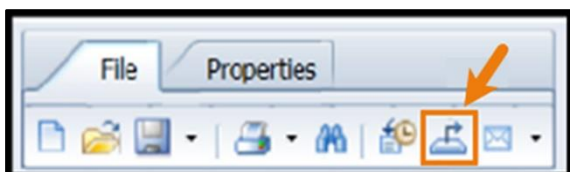


Figure 75 Export Button

2. The Export menu will be displayed.

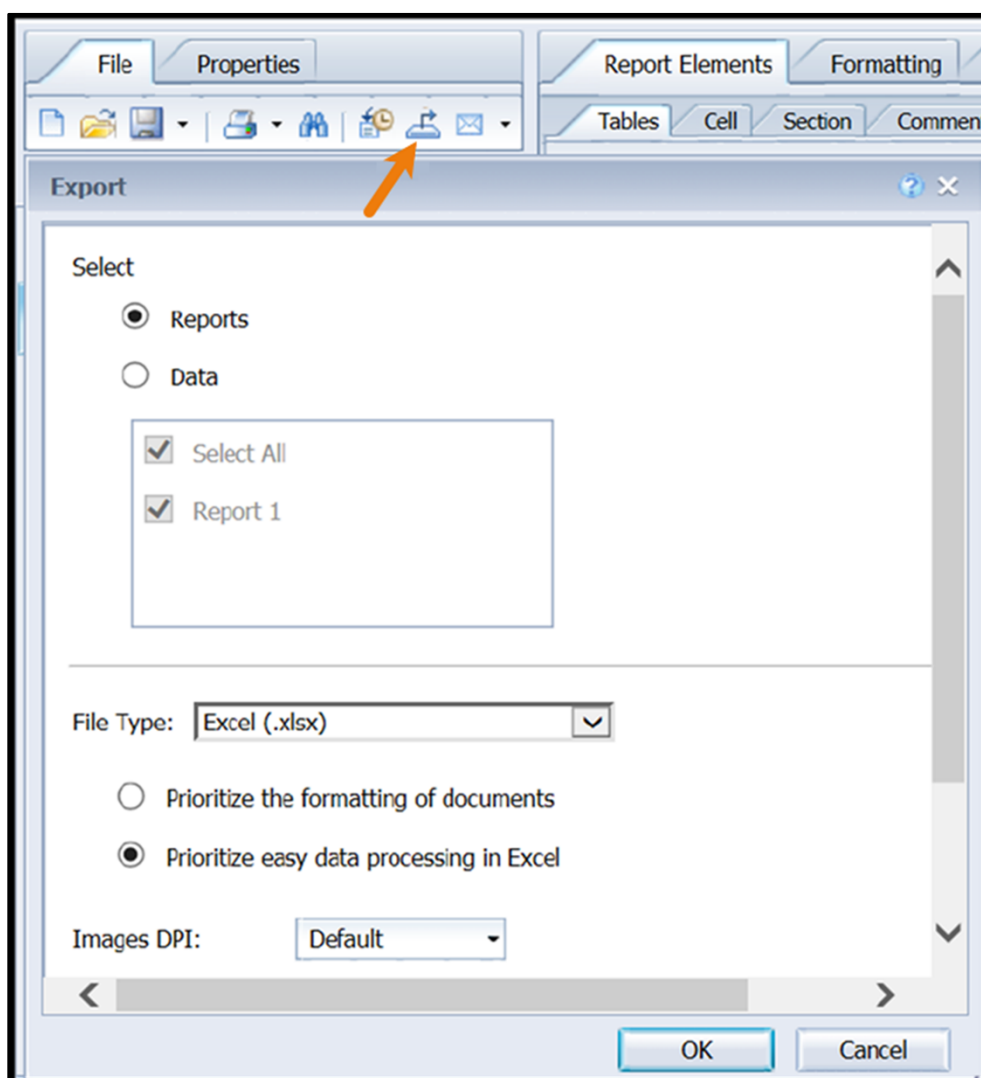


Figure 76 Export Menu

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.

Creating a New Report

1. Click the **Web Intelligence** icon under **My Applications**.

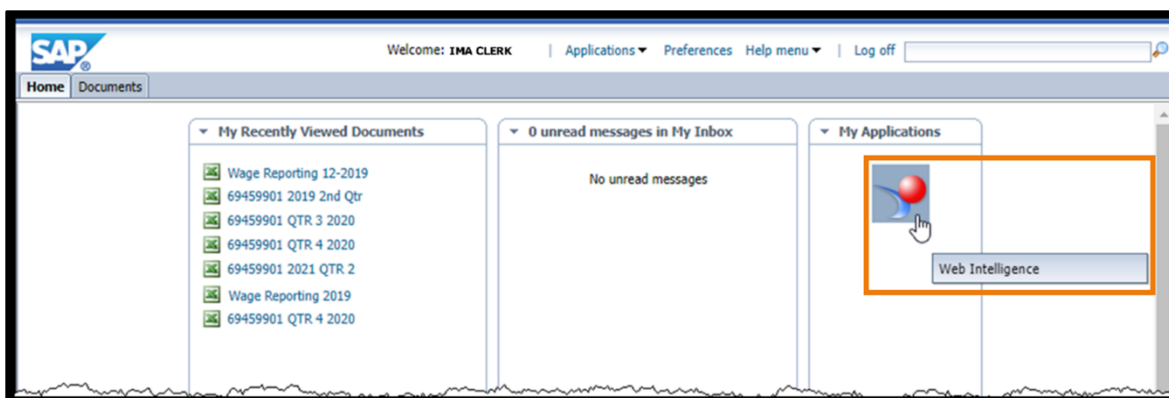


Figure 77 Web Intelligence Icon

Or select **Web Intelligence** from the Applications drop-down menu at the top of the page.

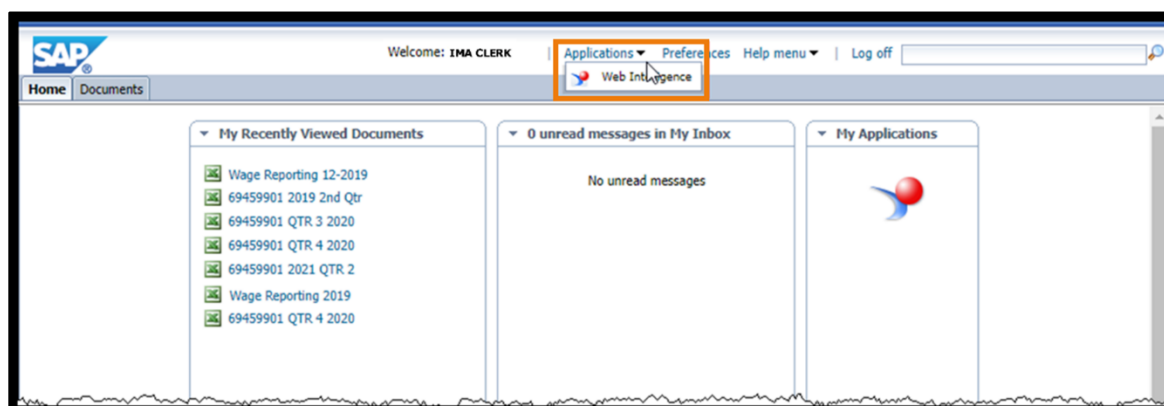


Figure 78 Applications Drop-Down Menu

2. From the menu in the top left side of the page, click the page icon for a new document.

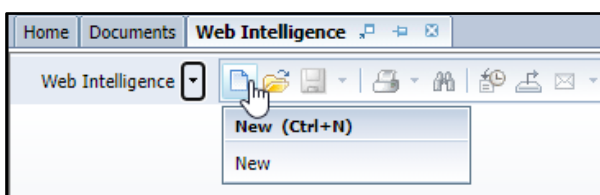


Figure 79 Page Icon

A list of data sources will be displayed.

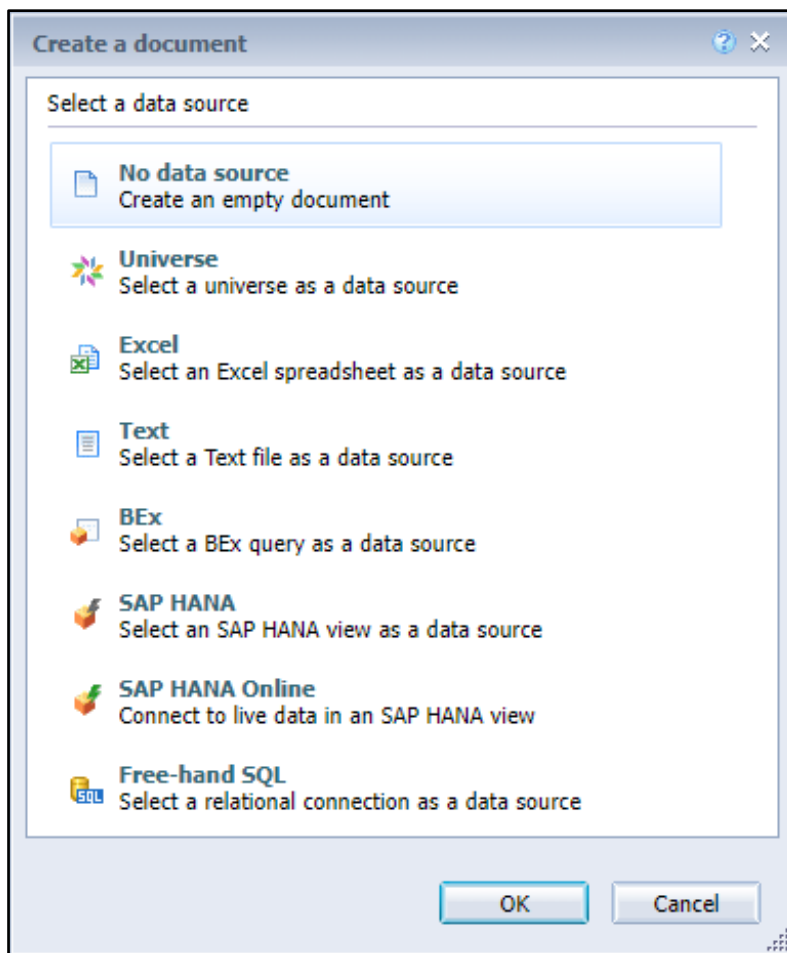


Figure 80 Data Sources Panel

3. Select **Universe** and click **OK**. A panel identifying the available universes will be displayed.
Note: The user will be limited to the data mart(s) that they have both requested access to and have been granted access to.

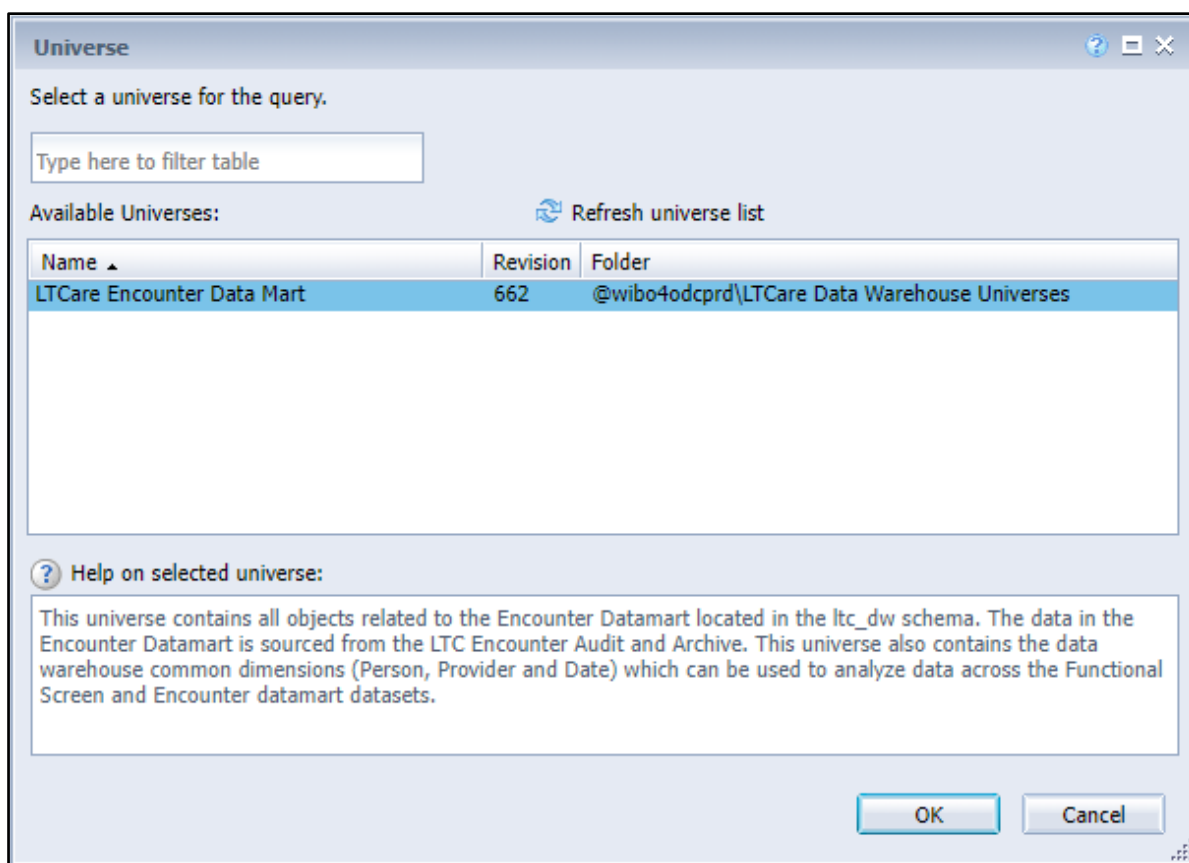


Figure 81 Universe Panel

4. Select from the available universes and click **OK** to begin creating the report.

Sending a Report to Another User

1. To send a report to another user, select the Documents tab and right-click on the report to be sent.
2. A menu will be displayed. From the menu, select **Send** and click **BI Inbox**.

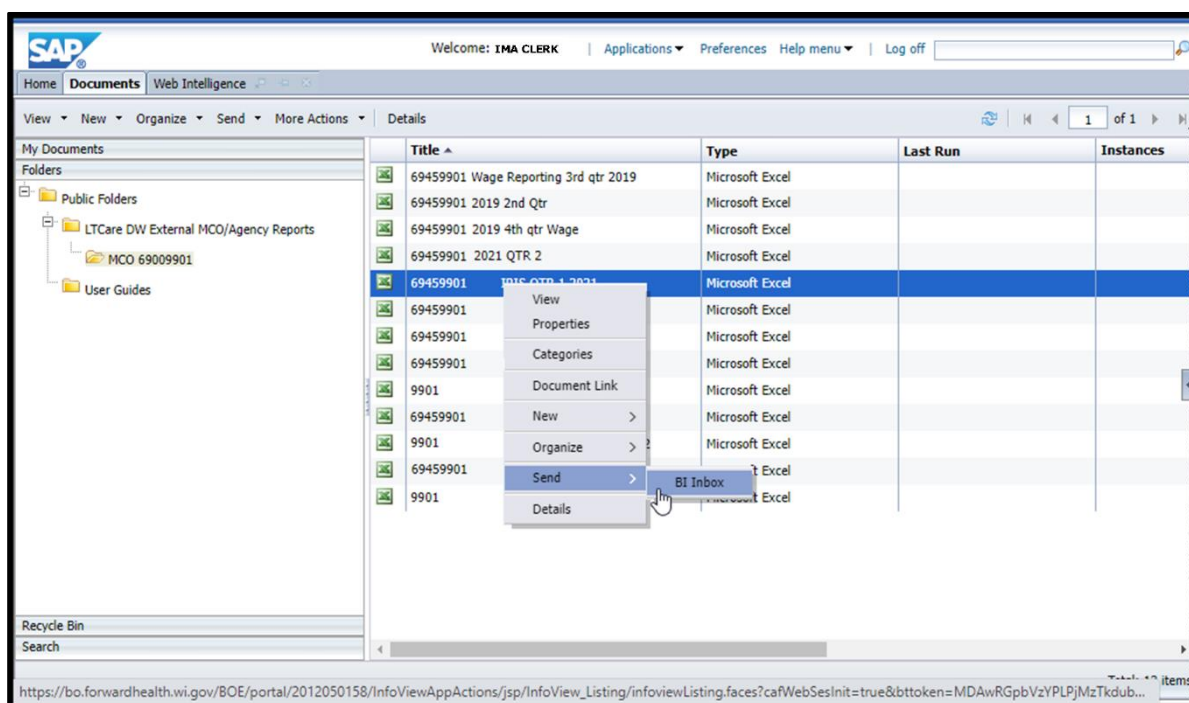


Figure 82 SAP BusinessObjects Documents Tab

The Business Intelligence Inbox will be displayed.

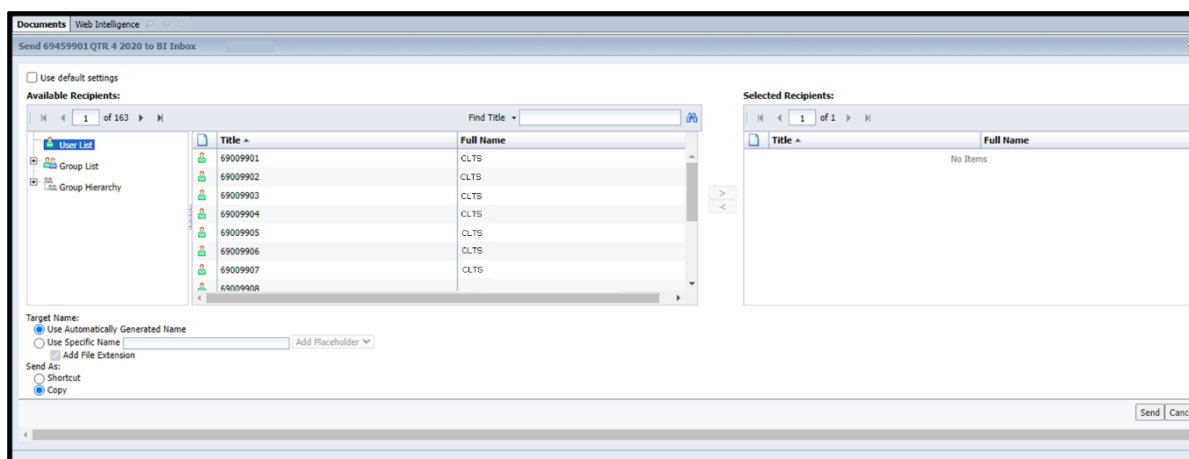


Figure 83 Business Intelligence Inbox

- Under the Available Recipients: box, search for the user to whom the report should be sent by entering the user information in the Find Title box and click enter or use the binoculars icon.

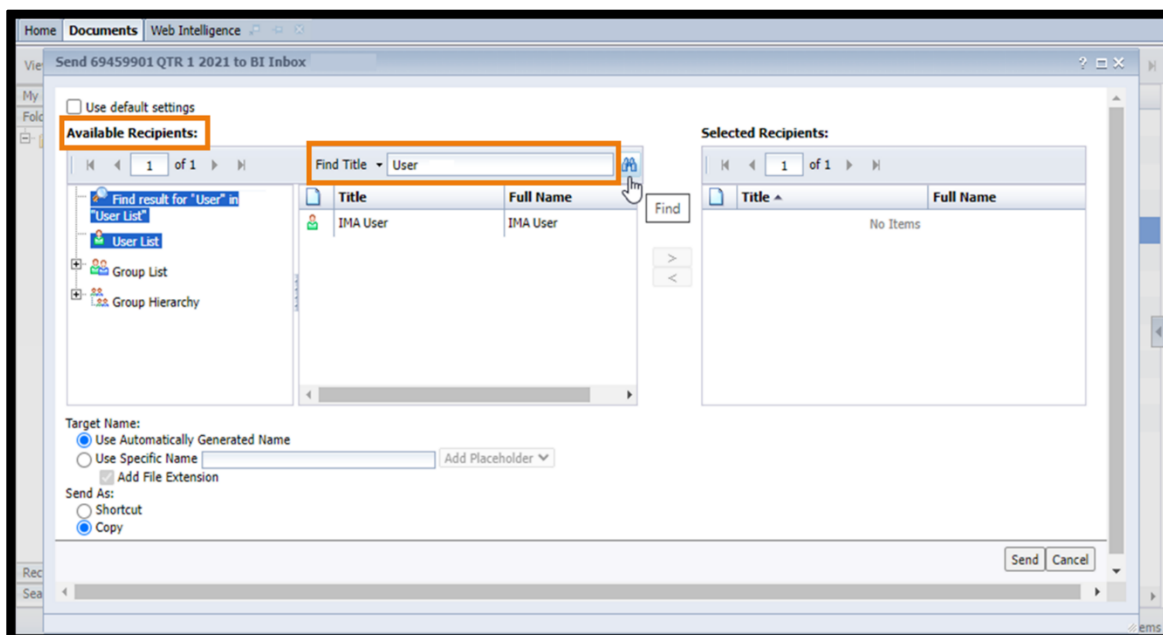


Figure 84 Business Intelligence Inbox

- Select the user and click the > arrow to add the user under the Selected Recipients: box.

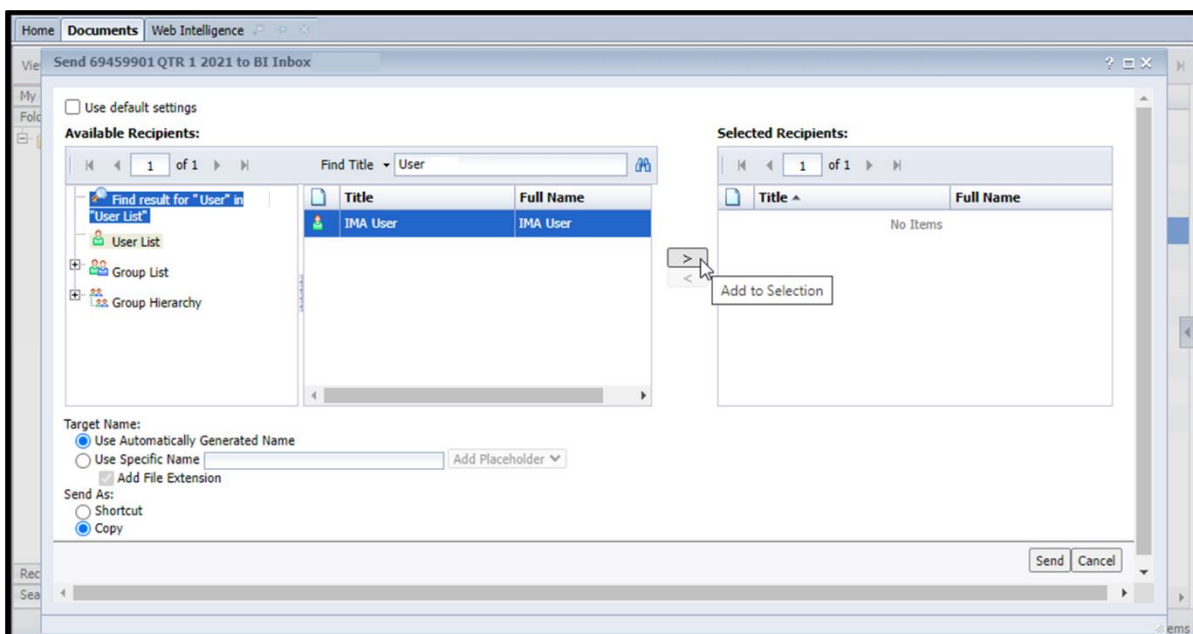


Figure 85 Business Intelligence Inbox

The user will be added under the Selected Recipients: box.

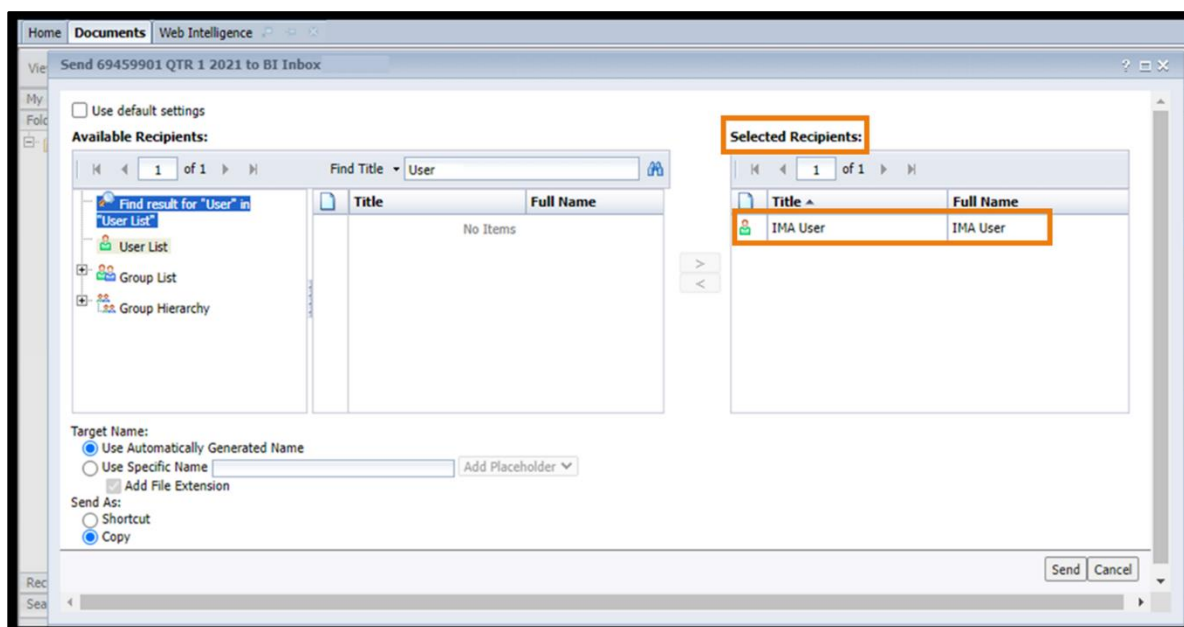


Figure 86 Business Intelligence Inbox

- Click **Send** in the bottom right corner. The recipient will receive the file in their inbox. Note: After sending the report, the user should remain logged in for several minutes to ensure the report is sent.

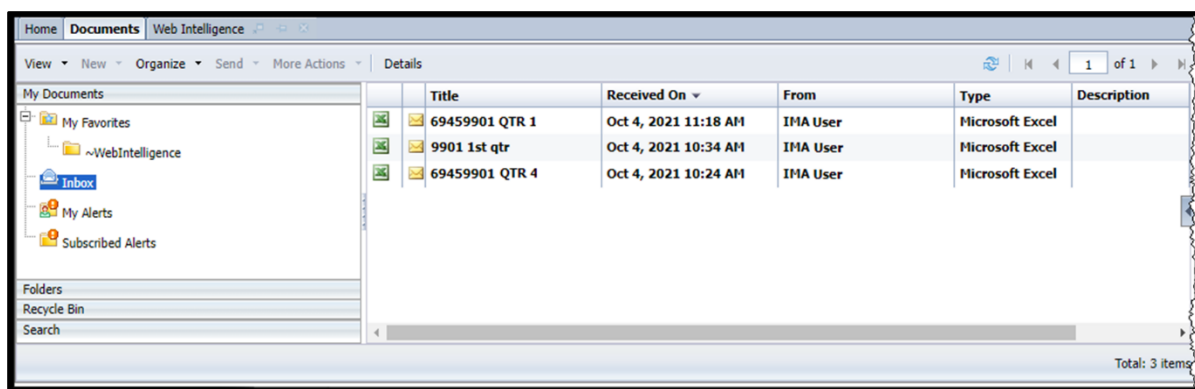


Figure 87 Recipient Inbox

Saving a Report

1. To save a report, click the disc icon from the menu in the upper left corner and select Save or Save As from the drop-down menu.

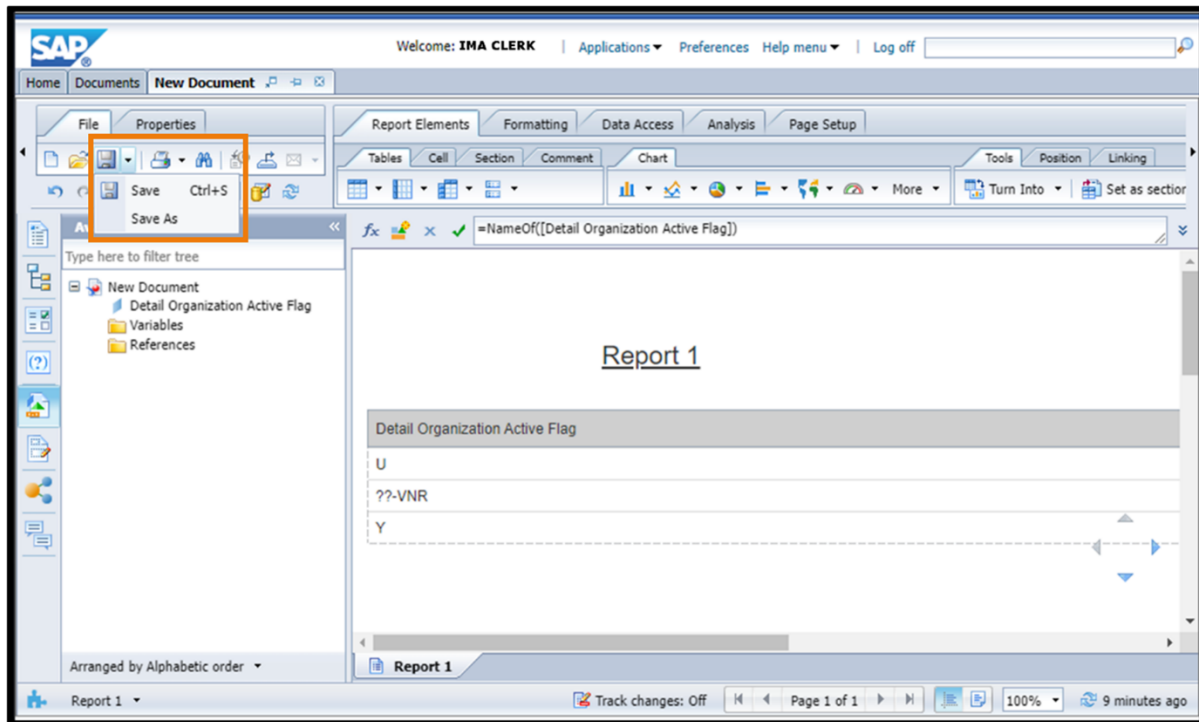


Figure 88 New Document Tab

A Save As panel will be displayed with the new report listed in the user's Favorites Folder.

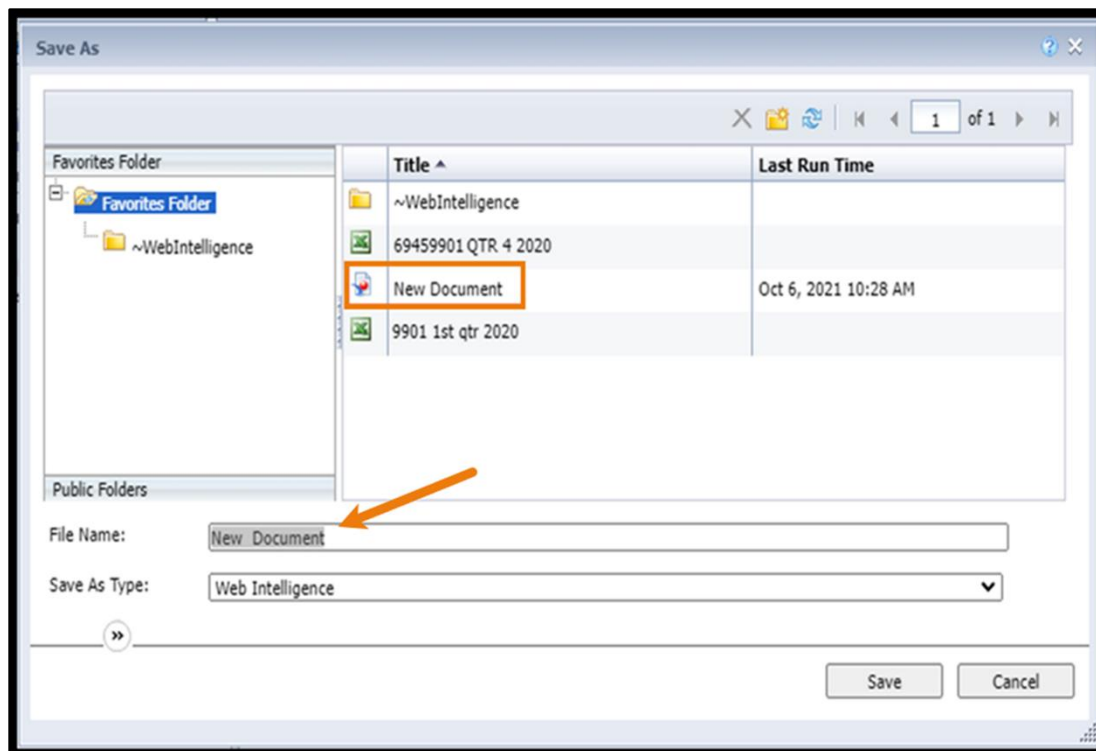


Figure 89 Save As Panel

- The user can name the report and click **Save**.
- Navigate to the My Favorites folder and the new report will be listed. Note: Users should not save their documents to the WebIntelligence folder. This is a temporary folder where documents will be automatically deleted.

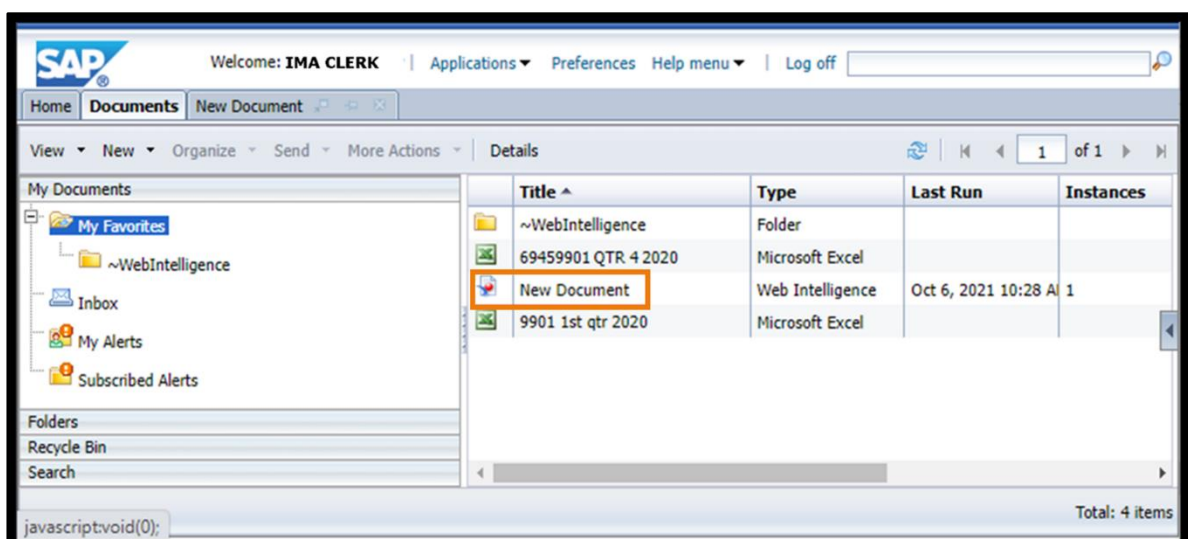


Figure 90 Documents Tab

Refreshing an Existing Report

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

1. To see new data in a report, right-click on the report and click **View** from the drop-down menu.

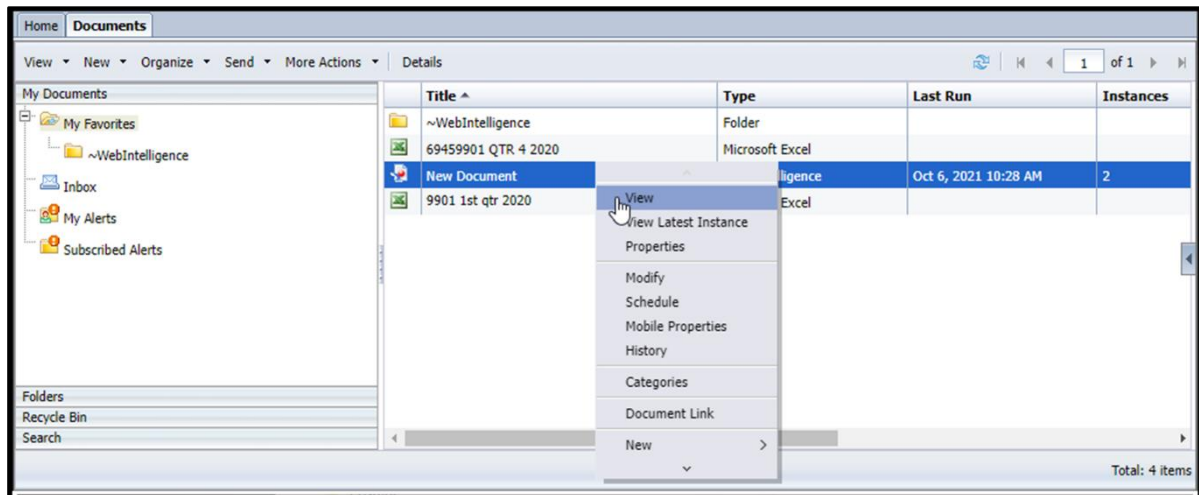


Figure 91 Documents Tab

2. The report will be displayed. Click the refresh icon or select a refresh option from the drop-down menu.

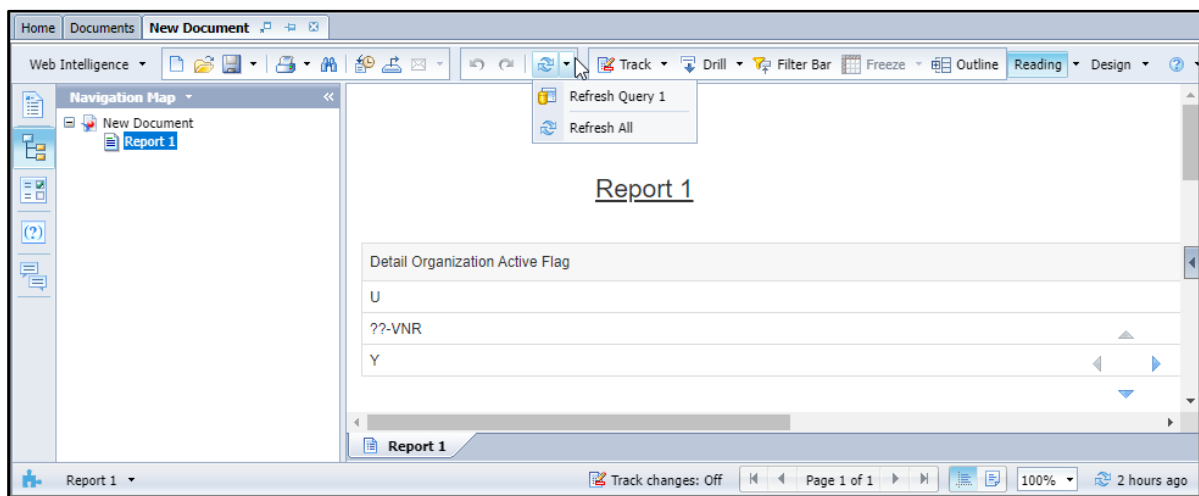


Figure 92 Refresh Data Icon

A Refreshing Data box will be displayed.

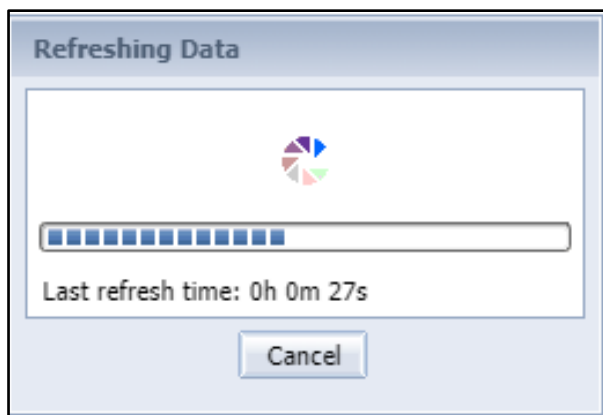


Figure 93 Refreshing Data Box

Scheduling a Report to Refresh

1. Right-click on the report and click **Schedule** from the drop-down menu.

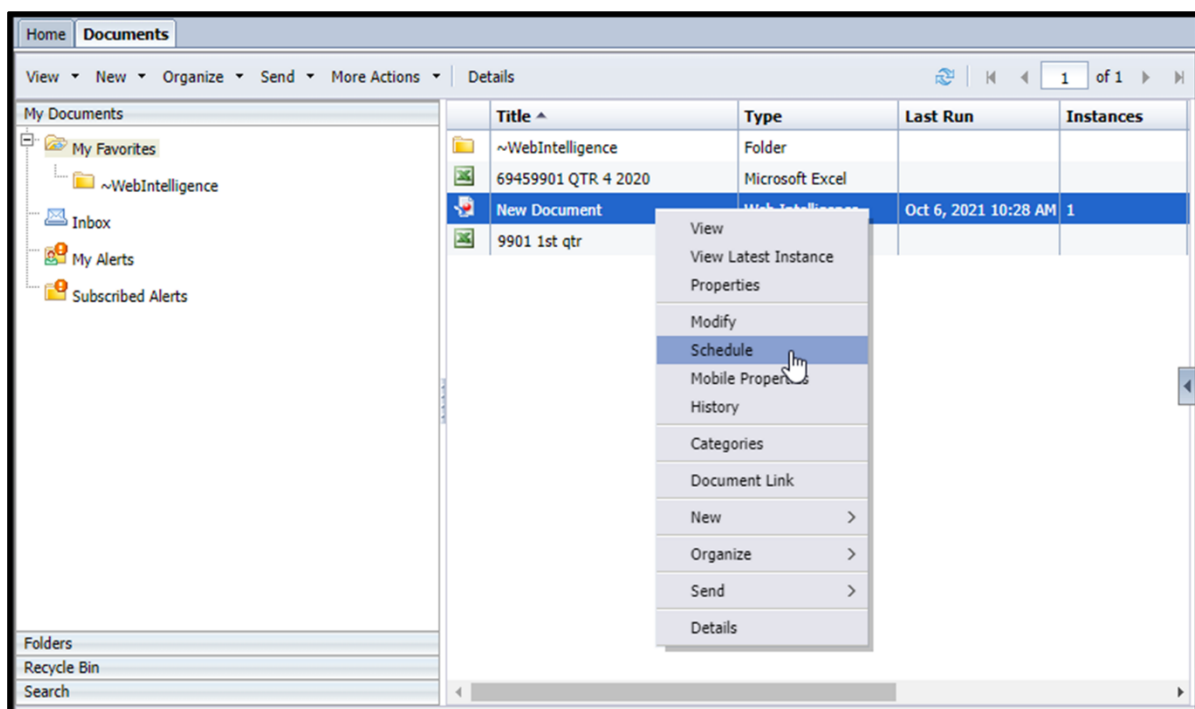


Figure 94 Documents Tab

2. The Schedule—New Document panel will be displayed. Click **Recurrence** from the Schedule menu. Note: Other menu options include Formats to choose an output format. Options include Microsoft Excel and Adobe Acrobat. Destinations can be selected to send to a user's inbox.

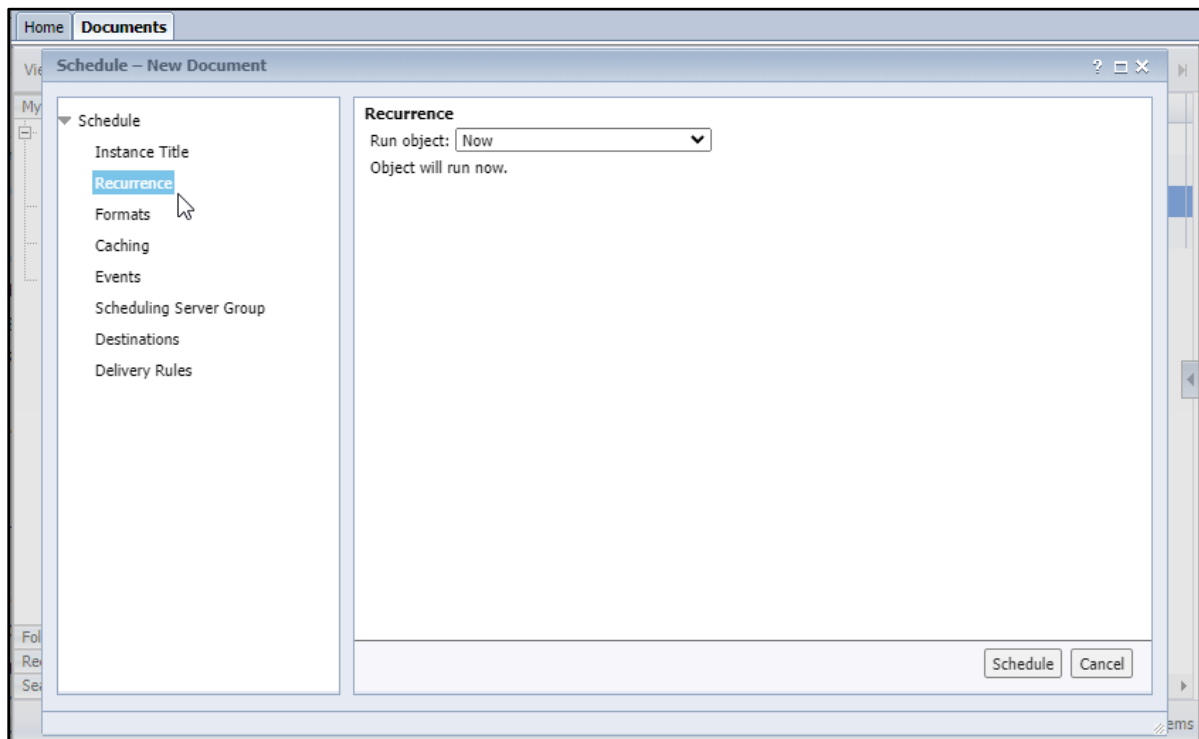


Figure 95 Schedule—New Document Panel

3. Click the appropriate option from the Run object: drop-down menu to determine when or how often the report should be refreshed. Click **Schedule** in the bottom right corner of the panel.

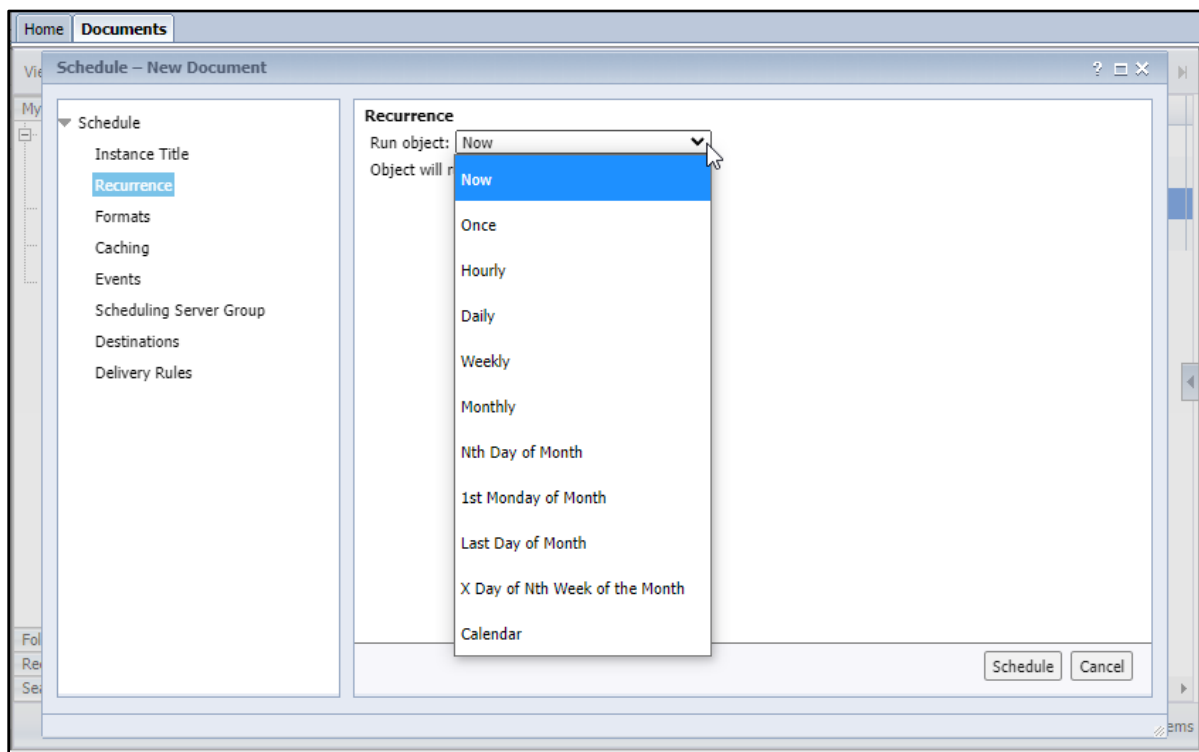
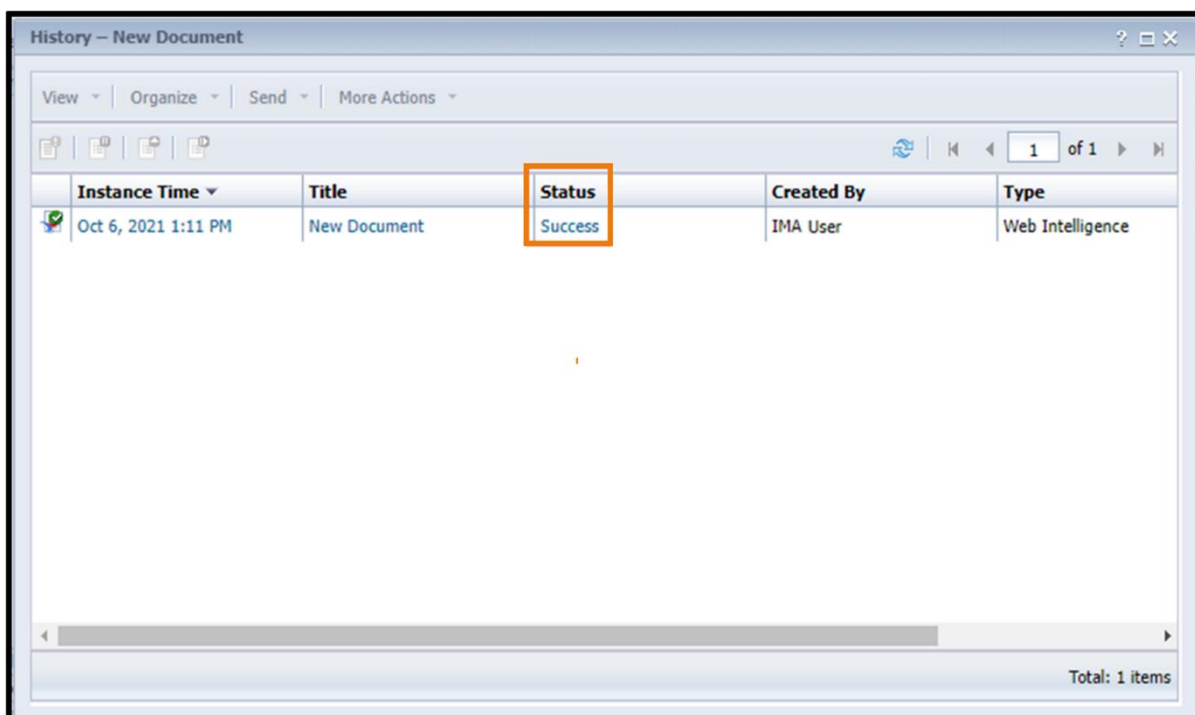


Figure 96 Schedule—New Document Panel

The History—New Document panel will be displayed, which lists the dates corresponding to the instances of the scheduled report. If the status indicates there was an error, the user can click on the error to obtain more information.



The screenshot shows a window titled "History — New Document". It contains a table with the following columns: Instance Time, Title, Status, Created By, and Type. The first row of data shows an instance time of "Oct 6, 2021 1:11 PM", a title of "New Document", a status of "Success" (highlighted with an orange box), a created by of "IMA User", and a type of "Web Intelligence". The status "Success" is a blue link. The table is on page 1 of 1, and there is a total of 1 item.

Instance Time	Title	Status	Created By	Type
Oct 6, 2021 1:11 PM	New Document	Success	IMA User	Web Intelligence

Figure 97 History—New Document Panel

Note: Users can also right-click on the report and select History from the drop-down menu to view the History—New Documents panel or click on the history icon from the menu at the top of the page.

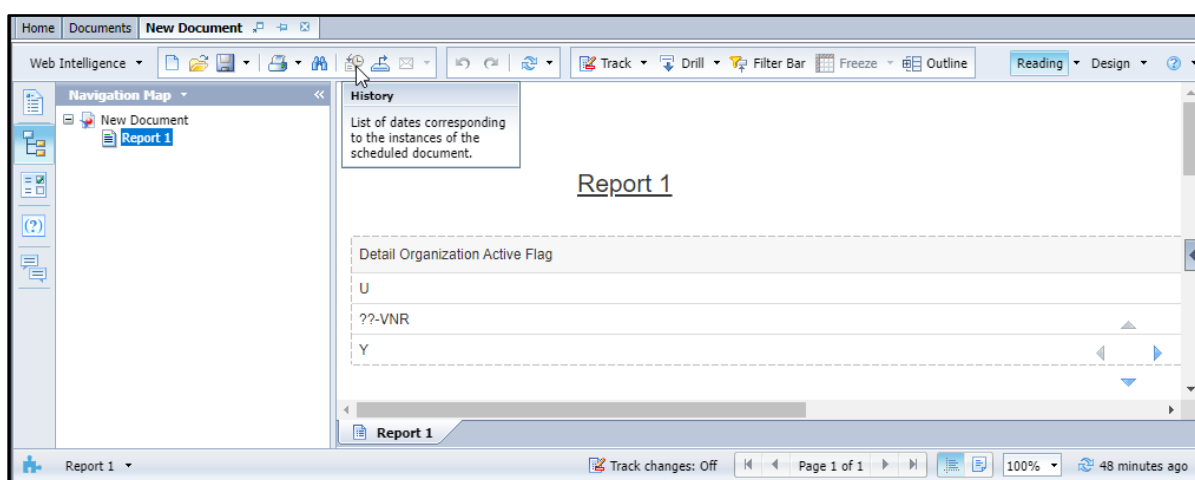


Figure 98 New Document Tab

13 DSS Universe Management

13.1 Requesting DSS Universe Access

Waiver agency administrators can request DSS Universe access for LTC universe reports for users in their waiver agency. Requests for DSS access are submitted by the administrator via the Portal. After the administrator completes the request, an email will be automatically generated to the appropriate help desk stating there are access requests in progress. After the access request has been approved by the help desk, the user will be granted access and sent an email confirming access. This access allows users to create and view reports with data from that data collection or universe.

For assistance with requesting access, creating or modifying queries, working with reports, errors, and connectivity, contact the LTC DW Help Desk at VDXCLTCDWHelp@wisconsin.gov.

13.2 Accessing DSS Universe Management

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

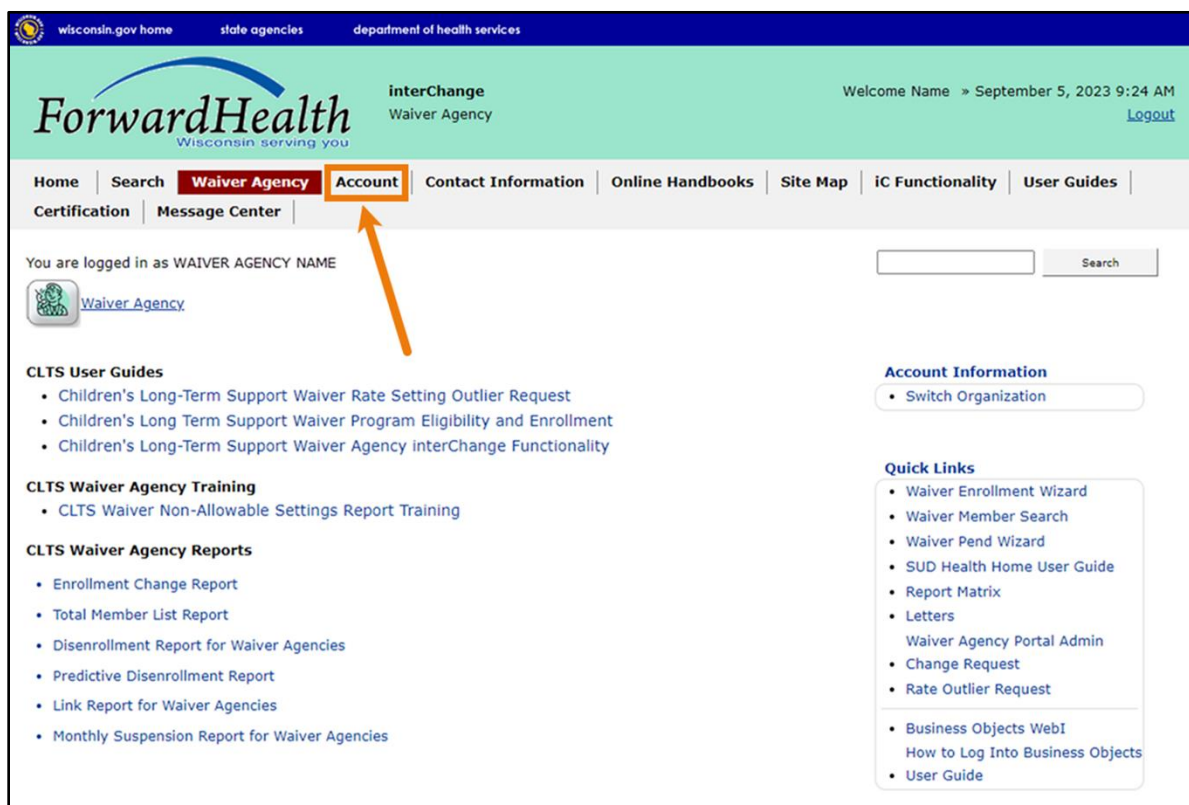


Figure 99 Secure Waiver Agency Page

2. From the Account screen, click **DSS Universe Management**.

Note: If the DSS Universe Management link does not appear on the Secure Waiver Agency page, the user either does not have access to this functionality or has accessed a different site.

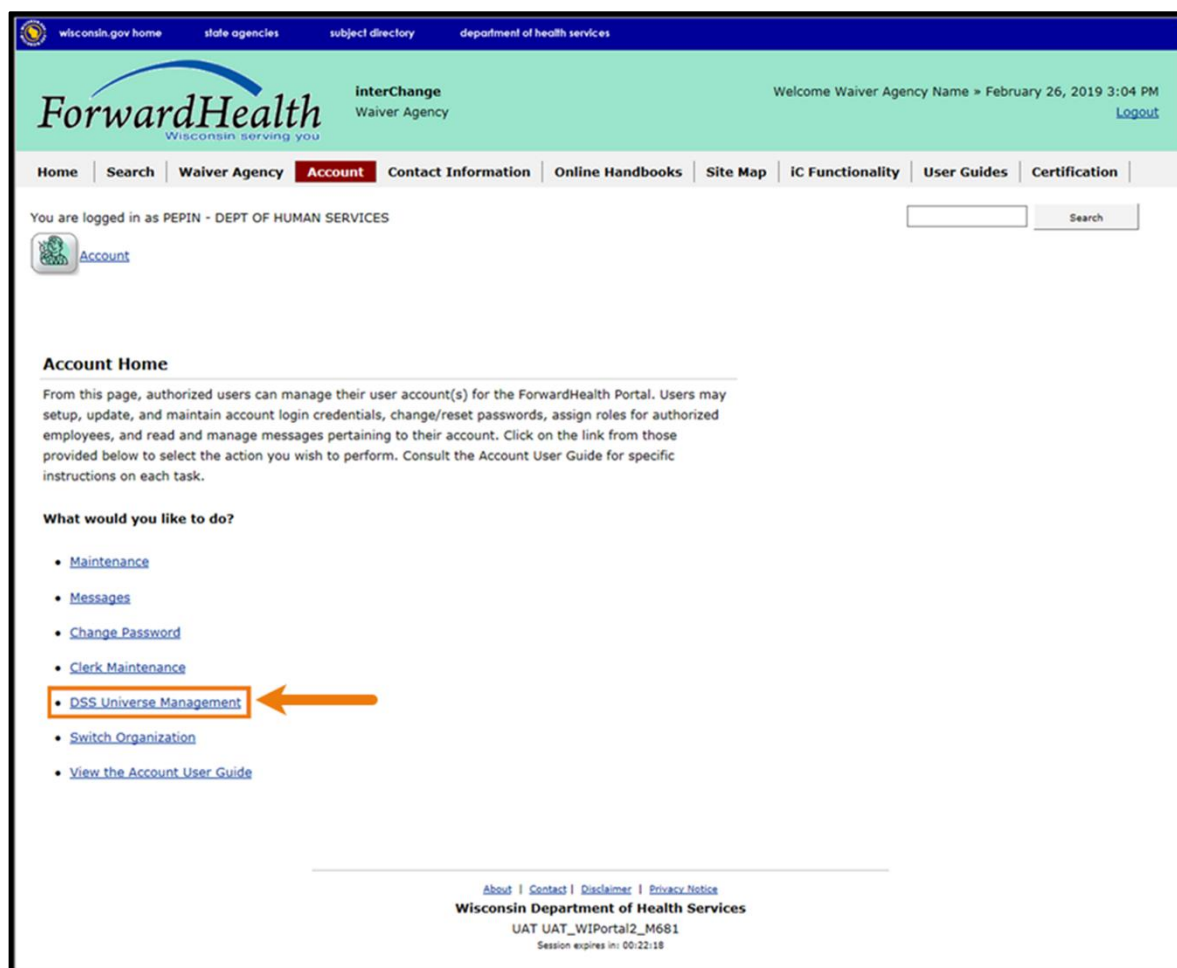
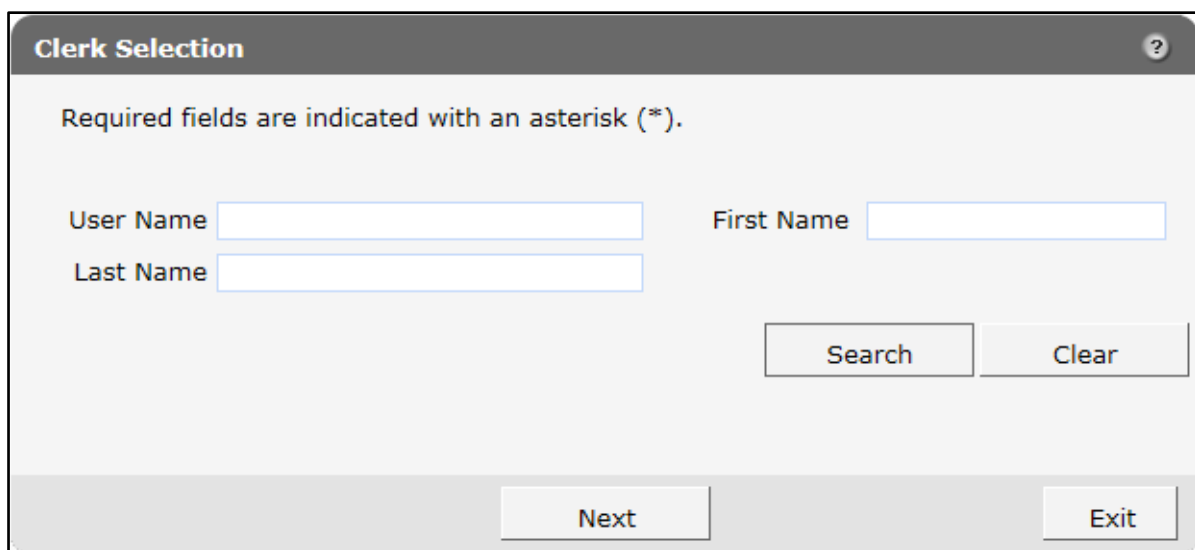


Figure 100 Account Screen

The Clerk Selection panel will be displayed.

The image shows a software window titled "Clerk Selection" with a question mark icon in the top right corner. Inside the window, a message states: "Required fields are indicated with an asterisk (*)." Below this, there are three text input fields: "User Name", "First Name", and "Last Name". The "User Name" and "Last Name" fields are on the left, and the "First Name" field is on the right. To the right of the "First Name" field, there are two buttons: "Search" and "Clear". At the bottom of the window, there are two buttons: "Next" and "Exit".

Clerk Selection

Required fields are indicated with an asterisk (*).

User Name First Name

Last Name

Search Clear

Next Exit

Figure 101 Clerk Selection Panel

3. Enter the user name, first name, or last name of the user who requires DSS access.

Note: The user must also have the necessary security role in order to be found by the search. Refer to [Appendix B: User Security Roles](#) for more information.

- Click the Search button. Search results will be populated below in the “Search Results” section.

The screenshot displays a web application interface for selecting a clerk. It is divided into three main sections: Clerk Selection, Search Results, and Request User Profile.

Clerk Selection

Required fields are indicated with an asterisk (*).

User Name First Name
Last Name

Search Results

User Name	First Name	Last Name
IMACLERK	IMA	CLERK

Request User Profile

User Information

User Name First Name
Last Name

Figure 102 Clerk Selection Panel With Search Results

13.3 Adding Universe Access

1. Select the user who requires DSS access. The user's information will be populated in the "Request User Profile" section.

The screenshot displays the 'Clerk Selection' panel. At the top, a header bar contains the title 'Clerk Selection' and a help icon. Below the header, a note states: 'Required fields are indicated with an asterisk (*).' The form includes three input fields: 'User Name', 'First Name', and 'Last Name'. To the right of these fields are 'Search' and 'Clear' buttons. Below the search area is a 'Search Results' section with a table. The table has three columns: 'User Name', 'First Name', and 'Last Name'. It lists four users, with the last one, 'TSTCLTSCLRK', highlighted in green. At the bottom of the panel is a 'Request User Profile' section, which is outlined with an orange border. This section contains a 'User Information' sub-section with three input fields: 'User Name' (populated with 'TSTCLTSCLRK'), 'First Name' (populated with 'A'), and 'Last Name' (populated with 'B'). At the very bottom of the panel are 'Next' and 'Exit' buttons.

Clerk Selection

Required fields are indicated with an asterisk (*).

User Name First Name
Last Name

Search Results

User Name	First Name	Last Name
UATWAIV1	d	b
TSTCLRK99999	tst	clrk
TSTIRISCLRK	A	B
TSTCLTSCLRK	A	B

Request User Profile

User Information

User Name First Name
Last Name

Figure 103 Clerk Selection Panel

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

DSS Management ?

Required fields are indicated with an asterisk (*).

Universe Requested	Status
--------------------	--------

Select row above to update -or- click Add button below.

Universe*

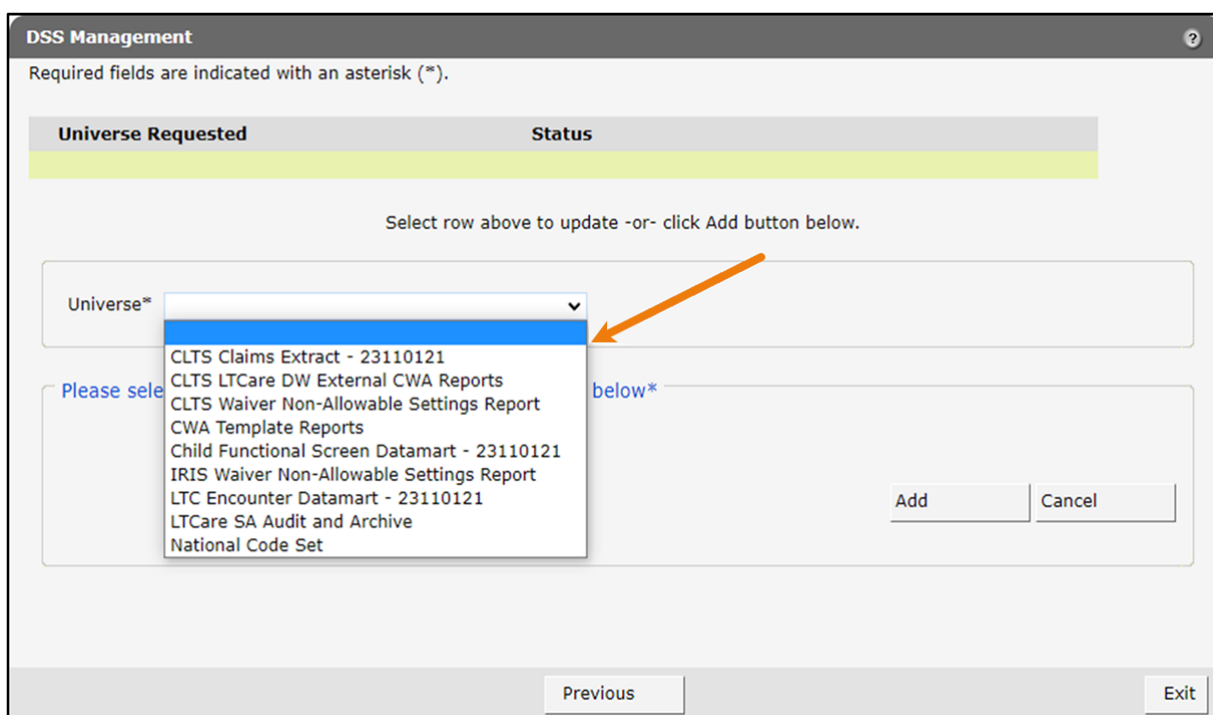
Please select one or more of the Universe Control Items below*

Add Cancel

Previous Exit

Figure 104 DSS Management Panel

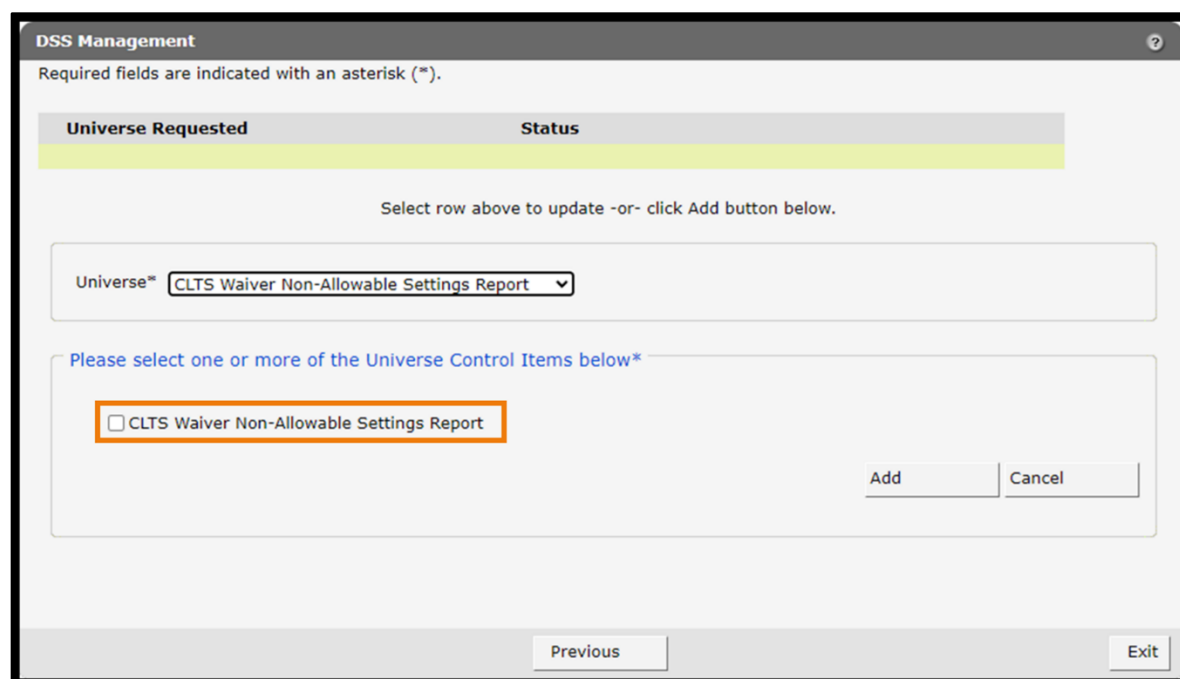
2. Select a universe from the Universe drop-down menu.



The screenshot shows the 'DSS Management' window. At the top, it says 'Required fields are indicated with an asterisk (*)'. Below this is a table with two columns: 'Universe Requested' and 'Status'. The table is currently empty. Below the table, there is a text prompt: 'Select row above to update -or- click Add button below.' Below this is a form with a 'Universe*' label and a drop-down menu. The drop-down menu is open, showing a list of options: 'CLTS Claims Extract - 23110121', 'CLTS LTCare DW External CWA Reports', 'CLTS Waiver Non-Allowable Settings Report', 'CWA Template Reports', 'Child Functional Screen Datamart - 23110121', 'IRIS Waiver Non-Allowable Settings Report', 'LTC Encounter Datamart - 23110121', 'LTCare SA Audit and Archive', and 'National Code Set'. An orange arrow points to the 'CLTS Waiver Non-Allowable Settings Report' option. Below the drop-down menu is a text prompt: 'Please select one or more of the Universe Control Items below*'. Below this is a list of checkboxes, with the first one labeled 'CLTS Waiver Non-Allowable Settings Report'. To the right of the list are 'Add' and 'Cancel' buttons. At the bottom of the window are 'Previous' and 'Exit' buttons.

Figure 105 DSS Management Panel

3. 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.

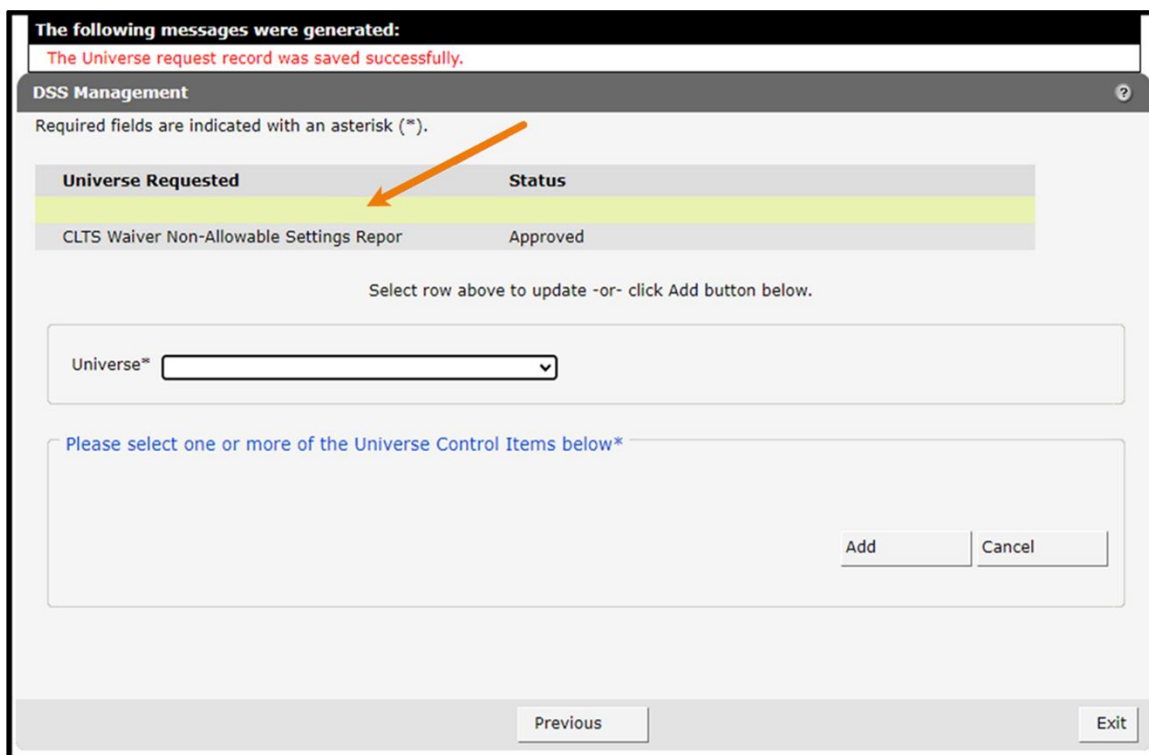


The screenshot shows the 'DSS Management' window after a selection. The 'Universe*' drop-down menu now displays 'CLTS Waiver Non-Allowable Settings Report'. Below the drop-down menu, the text prompt 'Please select one or more of the Universe Control Items below*' is followed by a list of checkboxes. The first checkbox, labeled 'CLTS Waiver Non-Allowable Settings Report', is now checked and highlighted with an orange border. The 'Add' and 'Cancel' buttons are still present. The 'Previous' and 'Exit' buttons are at the bottom.

Figure 106 DSS Management Panel With Universe Selected

If more than one universe is needed, select from the drop-down menu again.

- 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.
- Click **Add**. The page will be refreshed, and the universe(s) will be listed in the “Universe Requested” section with a confirmation message.



The following messages were generated:

The Universe request record was saved successfully.

DSS Management

Required fields are indicated with an asterisk (*).

Universe Requested	Status
CLTS Waiver Non-Allowable Settings Repor	Approved

Select row above to update -or- click Add button below.

Universe*

Please select one or more of the Universe Control Items below*

Figure 107 DSS Management Panel

Once added, a request will be automatically sent to the LTC DW Help Desk for access approval. This approval typically takes one to two business days. After the access request has been granted by the help desk, the user will be able to use the requested universes for reporting.

13.4 Deleting Universe Access

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

DSS Management

Required fields are indicated with an asterisk (*).

Universe Requested	Status
CLTS Waiver Non-Allowable Settings Repor	Approved

Select row above to update -or- click Add button below.

Universe: CLTS Waiver Non-Allowable Settings Report ▼

Status*: ▼

Please select one or more of the Universe Control Items below*

☒ CLTS Waiver Non-Allowable Settings Report

Save Cancel

Previous Exit

Figure 108 DSS Management Panel

2. Select **Request Removal** from the Status drop-down menu.

The screenshot displays the 'DSS Management' window. At the top, a message states: 'Required fields are indicated with an asterisk (*).' Below this is a table with two columns: 'Universe Requested' and 'Status'. The table contains one row: 'CLTS Waiver Non-Allowable Settings Repor' (note the typo) with a status of 'Approved'. Below the table, a prompt says: 'Select row above to update -or- click Add button below.' Underneath is a form with two dropdown menus: 'Universe' (set to 'CLTS Waiver Non-Allowable Settings Report') and 'Status*' (which is open, showing 'Request Removal' as the selected option). Below the 'Status*' dropdown, a blue prompt reads: 'Please select one or more of the Universe Control Items below*'. Under this prompt is a checkbox labeled 'CLTS Waiver Non-Allowable Settings Report', which is checked. At the bottom right of the form are 'Save' and 'Cancel' buttons. At the very bottom of the window are 'Previous' and 'Exit' buttons.

Universe Requested	Status
CLTS Waiver Non-Allowable Settings Repor	Approved

Select row above to update -or- click Add button below.

Universe: CLTS Waiver Non-Allowable Settings Report

Status*: Request Removal

Please select one or more of the Universe Control Items below*

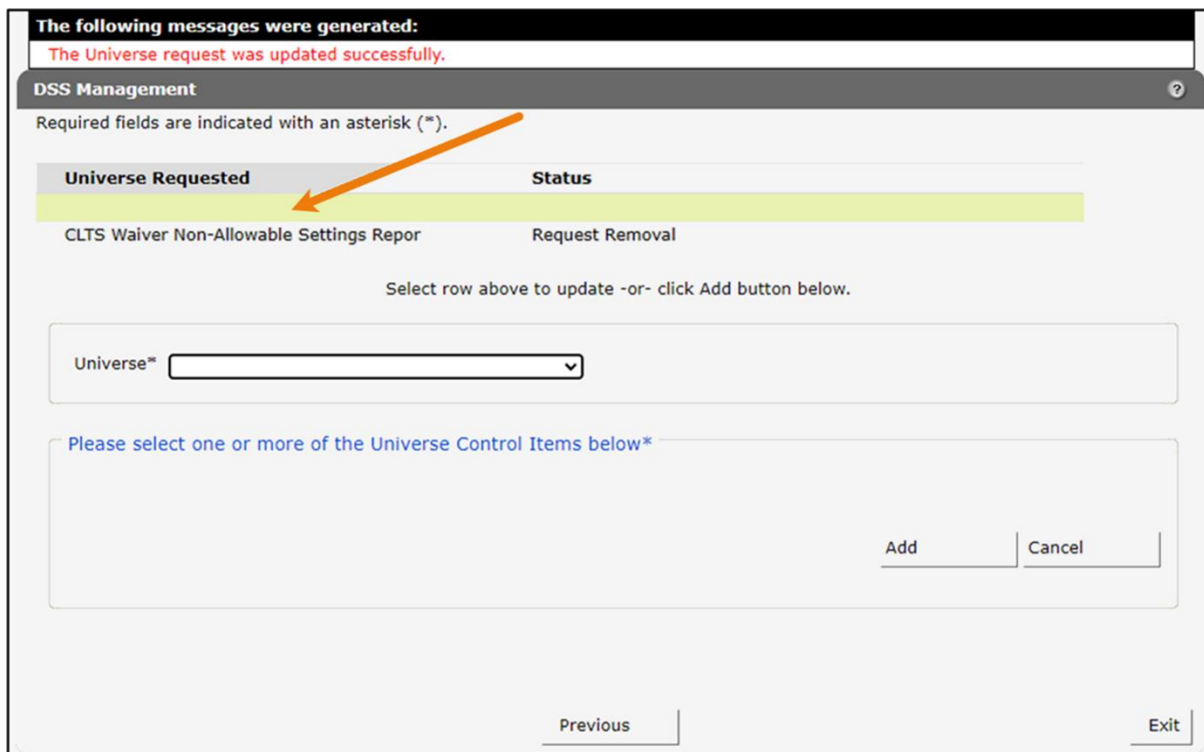
☒ CLTS Waiver Non-Allowable Settings Report

Save Cancel

Previous Exit

Figure 109 DSS Management Panel Request Removal

3. Click **Save**. The page will be refreshed, and the universe status will be listed in the “Universe Requested” section with a confirmation message. A request for removal of the universe access from this clerk’s account will be sent to the LTC DW Help Desk.



The following messages were generated:

The Universe request was updated successfully.

DSS Management

Required fields are indicated with an asterisk (*).

Universe Requested	Status
CLTS Waiver Non-Allowable Settings Repor	Request Removal

Select row above to update -or- click Add button below.

Universe*

Please select one or more of the Universe Control Items below*

Add Cancel

Previous Exit

Figure 110 DSS Management Panel

14 CLTS Service Authorizations

14.1 Accessing the Universe for CLTS Service Authorizations

1. Log in to Business Objects. The SAP BusinessObjects home tab will be displayed.
2. Click the **Web Intelligence** icon under **My Applications**.

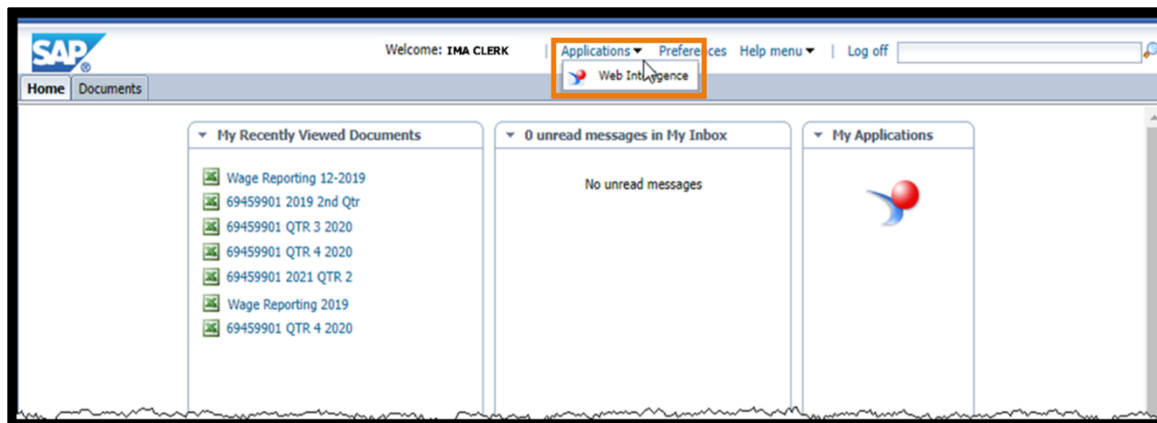


Figure 111 Web Intelligence Icon

Or select **Web Intelligence** from the Applications drop-down menu at the top of the page.

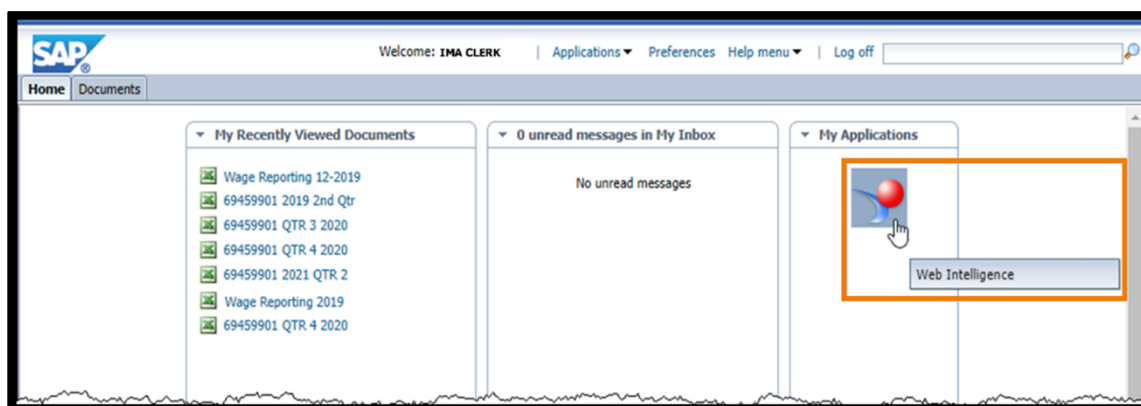


Figure 112 Applications Drop-Down Menu

3. From the menu in the top left side of the page, click the page icon for a new document.

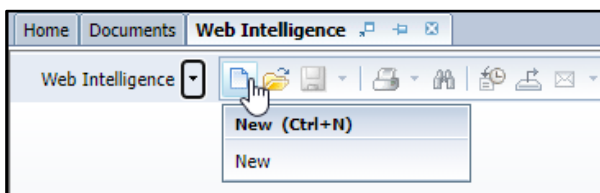


Figure 113 Page Icon

A list of data sources will be displayed.

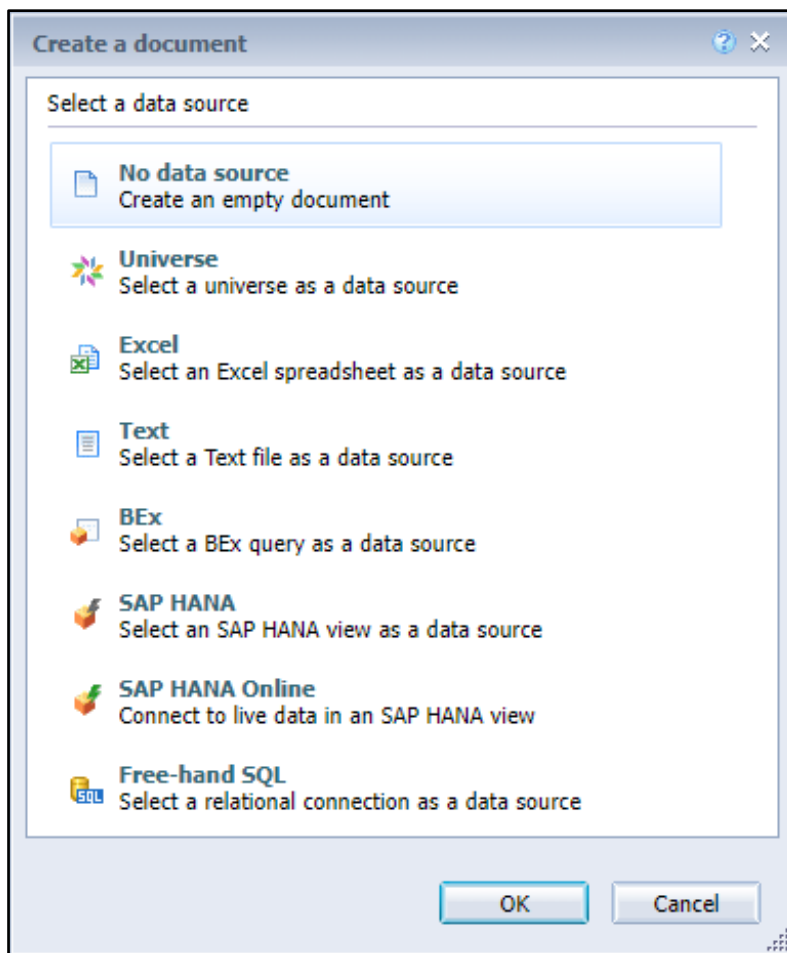


Figure 114 Data Sources Panel

4. Select **Universe** and click **OK**. A panel identifying the available universes will be displayed.
Note: The user will be limited to the data mart(s) that they have both requested access to and have been granted access to.

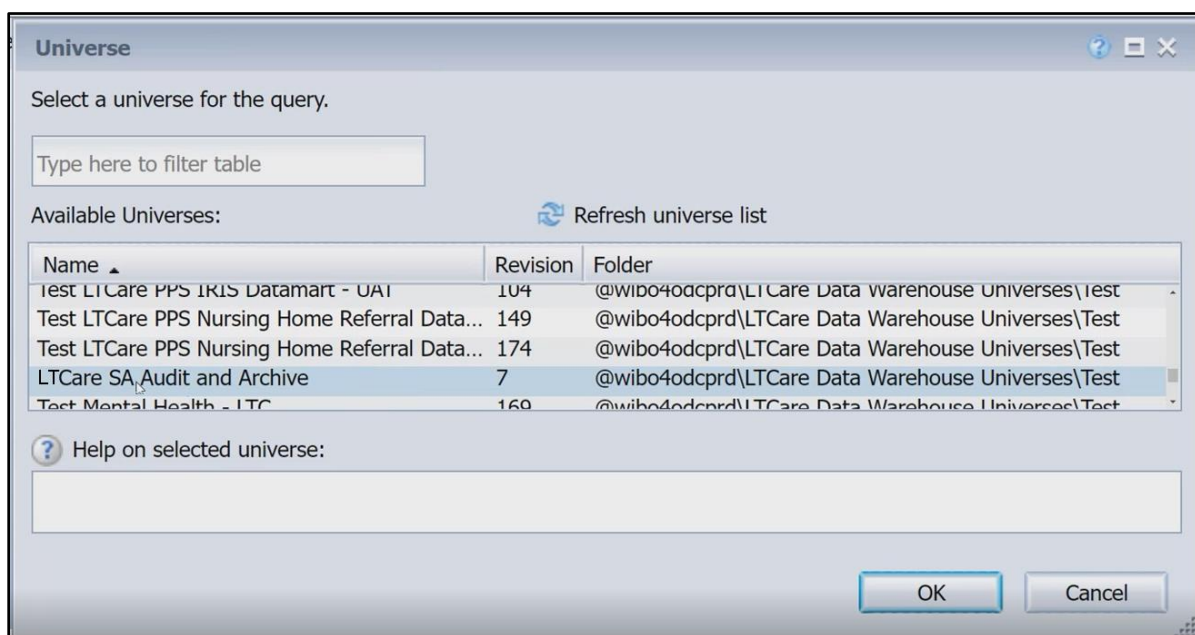


Figure 115 Universe Panel

5. Select LTCare SA Audit and Archive and click **OK**. The Query panel will be displayed.

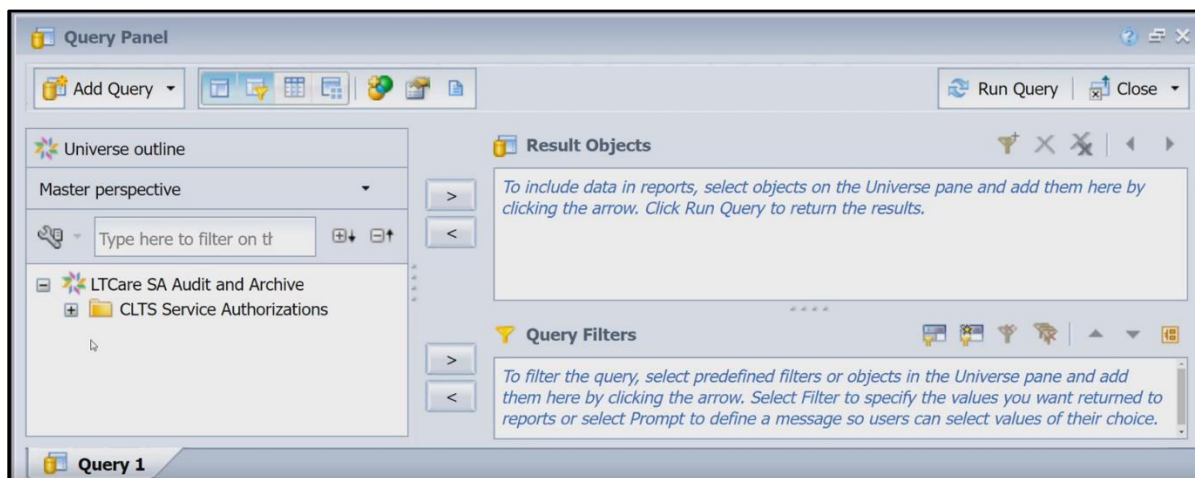


Figure 116 Query Panel

6. Click **+** next to the CLTS Service Authorizations folder. The folders containing the detail record, header record, and trailer record data fields will be displayed.

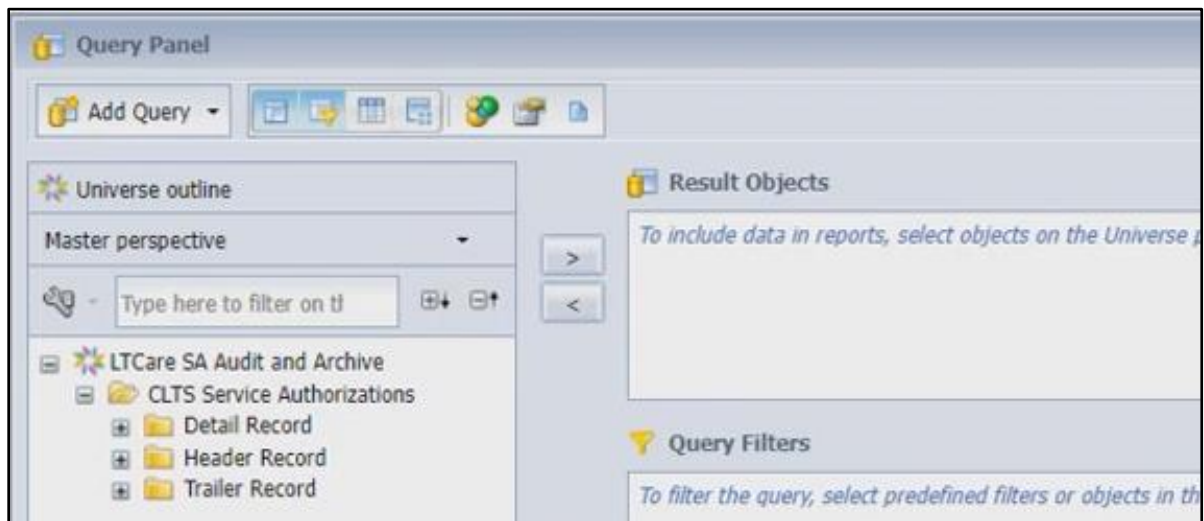


Figure 117 Query Panel—CLTS Service Authorizations Folders

7. Click + next to the Detail Record folder. The detail record data fields will be listed.

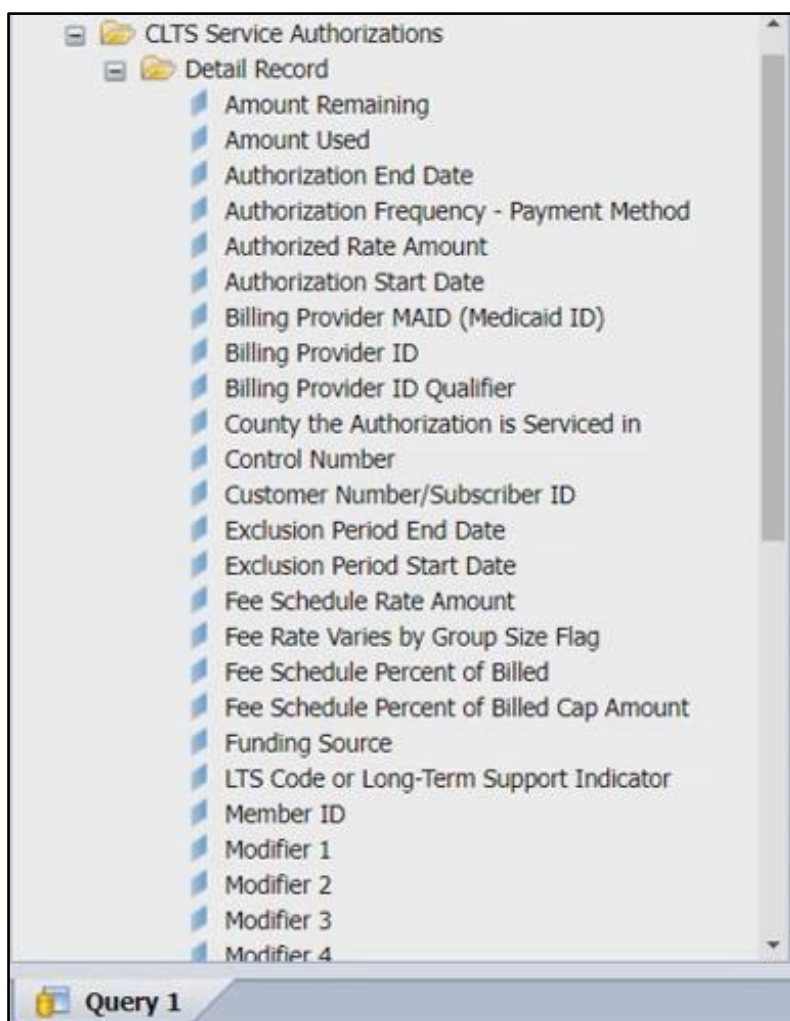


Figure 118 Query Panel—Detail Record Data Fields

Detail record data fields include the following:

- The *Amount Remaining* field displays the amount not used based on the initial authorization amount minus the amount billed and paid at the time of the file submission to DHS.
- The *Amount Used* field displays the amount used and paid for concerning this authorization at the time of the file submission to DHS.
- The *Authorization End Date* field displays the latest date the service is authorized to be performed.
- The *Authorization Frequency—Payment Method* field identifies the units and/or dollars are authorized on the prior authorization line item. Valid values are:
 - o Total—Dollar amount

- o Member—Dollar amount per unit
- o Amount—Max dollar amount to pay
- o *Rate—Dollar amount per unit
- o CaseMgmt—Dollar amount per unit
- The *Authorized Rate Amount Date* field displays the fee rate for the procedure/service.
- The *Authorization Start Date* field displays the earliest date the service is authorized to be performed.
- The *Billing Provider MAID (Medicaid ID)* field displays the provider ID assigned by the MMIS system at the time the provider is registered.
- The *Billing Provider ID* field displays the identifier for the provider.
- The *Billing Provider ID Qualifier* field identifies which value is provided in the Billing Provider ID field. Values are:
 - o 24—EIN
 - o 34—SSN
 - o XX—NPI
 - o CO—Locally assigned ID
- The *County the Authorization is Serviced in* field is not currently being used and contains 999.
- The *Control Number* field is a unique “file identifier,” which identifies the particular file and must match the control number in the trailer record. This control number is generated by the program payer.
- The *Customer Number/Subscriber ID* field contains the Facets ID on the MCI.
- The *Exclusion Period End Date* field displays the end date of the federal sanction. When no end date exists, a default value of 12/31/9999 will be set.
- The *Exclusion Period Start Date* field displays the start date of the federal sanction. When no start date exists, a default value of 12/31/9999 will be set.
- The *Fee Schedule Rate Amount* field displays the amount the fee schedule set for the rate of payment of the authorized service.
- The *Fee Rate Varies by Group Size Flag* field indicates when a group verses individual service affects the rate.
- The *Fee Schedule Percent of Billed* field displays the percentage of the fee schedule rate amount authorized to be billed for the service if applicable.

- The *Fee Schedule Percent of Billed Cap Amount* field displays the percentage of the fee schedule rate amount authorized to be exceeded when billed for the service if applicable.
- The *Funding Source* field provides a text description of the funding source code. Values are:
 - o CP—COP match funding
 - o CA—Community Aids match funding
 - o FS—Family Support match funding
 - o LO—County local tax
 - o HC—High cost
 - o SP—Special funding
- The *LTS Code or Long-Term Support Indicator* field displays which long-term support program the authorization for the member is related to. Examples include:
 - o H—Children's long-term support—DD state match
 - o I—Children's long-term support—DD local match
- The *Member ID* field displays the identifier assigned by the MMIS system when a person becomes enrolled in a Medicaid program.
- The *Modifier 1–4* fields display modifiers that are used to further describe an authorized procedure.
- The *National Drug Code* field displays a National Drug Code representing a drug that is authorized for the member.
- The *Procedure Code* field displays the national code (Current Procedural Terminology or Healthcare Common Procedure Coding System) identifying the authorized service to be performed.
- The *Rate Type* field displays the description of the rate type code.
- The *Record Added Date* field displays the date the authorization record was created.
- The *Record Last Update Date* field displays the date the record was last updated.
- The *Rendering Provider ID* field displays the identification number of the rendering provider that is authorized to perform the service.
- The *Rendering Provider ID Qualifier* field identifies which value is provided in the Billing Provider ID field. Values are:
 - o 24—EIN
 - o 34—SSN

- o XX—NPI
- o CO—Locally assigned ID
- The *Revenue Code* field displays the four-digit revenue code that represents a service authorized to be rendered.
- The *Revision Indicator* field displays the type of authorization. Values are:
 - o 0—New add
 - o 1—Revised
 - o C—Cancel
- The *Self Directed Indicator* field displays one of the following values:
 - o C—not self-directed or
 - o S—self-directed
- The *Service Category* field displays the service category. This field will default to CLTS.
- The *Units Approved* field displays the number of units of the authorized service to be performed.
- The *Units Remaining* field displays the number of units not used based on the initial authorization amount minus the amount billed and paid at the time of the file submission to DHS.
- The *Units Used* field displays the number of units used and paid for concerning the authorization at the time of the file submission to DHS.
- The *Waiver Agency Authorization Number* field displays the CLTS Internal Authorization Number assigned by the CLTS group. The field will be blank when one of the following is true:
 - o The CLTS group did not submit their authorization number on the authorization record.
 - o The authorization record could not be found to process the claim.
 - o The authorization record was manually entered.
 - o There was not a CLTS authorization number to enter.
- The *Waiver Agency Internal Authorization Number* field displays the Internal Authorization Number. Contains a value assigned by the CLTS group.
- The *Waiver Agency Internal Group Number* field displays the group ID for the CWA.

- The *Waiver Agency Organizational ID* field displays the ID assigned to the waiver agency by the MMIS system. The first four digits 2311 are followed by the three-digit county code and one-digit agency type.
 - The *Waiver Program* field displays the waiver program the authorization pertains to CLTS.
8. Click + next to the Header Record folder. The header record data fields will be listed.

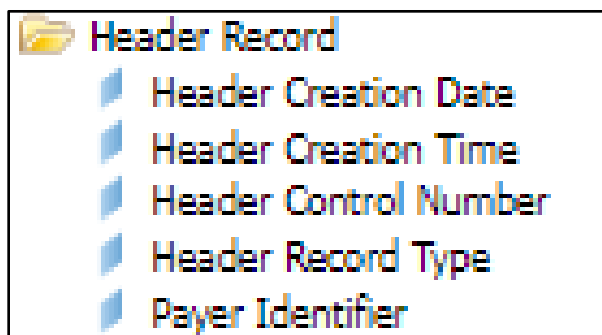


Figure 119 Query Panel—Header Record Data Fields

Header record data fields include the following:

- The *Header Creation Date* field displays the date the file was created for transmission to DHS in yyymmdd format.
 - The *Header Creation Time* field displays the creation time in 24-hour format.
 - The *Header Control Number* field is a unique “file identifier,” which identifies a particular file and must match the control number in the trailer record. This control number is generated by the program payer.
 - The *Header Record Type* field displays the record type (header record).
 - The *Payer Identifier* field is a unique identifier for the program payer.
9. Click + next to the Trailer Record folder. The trailer record data fields will be listed.

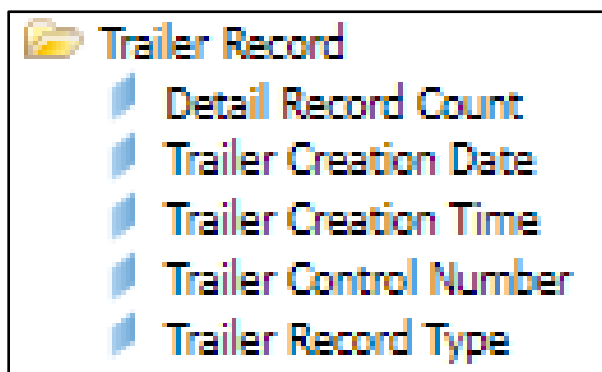


Figure 120 Query Panel—Trailer Record Data Fields

Trailer record data fields include the following:

- The *Trailer Creation Time* field displays the date the file was created for transmission to DHS in yyyyymmdd format.
- The *Trailer Creation Date* field displays the creation time in 24-hour format.
- The *Trailer Control Number* field is a unique “file identifier,” which identifies a particular file and must match the control number in the trailer record. This control number is generated by the program payer.
- The *Trailer Record Type* field displays the record type (trailer record).
- The *Trailer Detail Record Count* field displays the count of detail records between the header and trailer excluding the header and trailer record.

14.1.1 Query Scenarios

Examples are provided for the following data query scenarios. Users may choose to use their own methods for accessing data:

- [How to Query a Specific Authorization Record Using an Authorization Number](#)
- [How to Query Remaining Service Utilization/Units on a Service Authorization](#)
- [How to Query for Authorizations Over a Set Period of Time](#)
- [How to Query for Authorizations by Provider and Service](#)
- [How to Query for Authorizations by Participant](#)

How to Query a Specific Authorization Record Using an Authorization Number

1. Click the Waiver Agency Authorization Number, Authorization Start Date, Authorized Rate Amount, Authorization End Date, and Amount Remaining fields listed under the details folder. The fields will be displayed in the Result Objects Query panel.

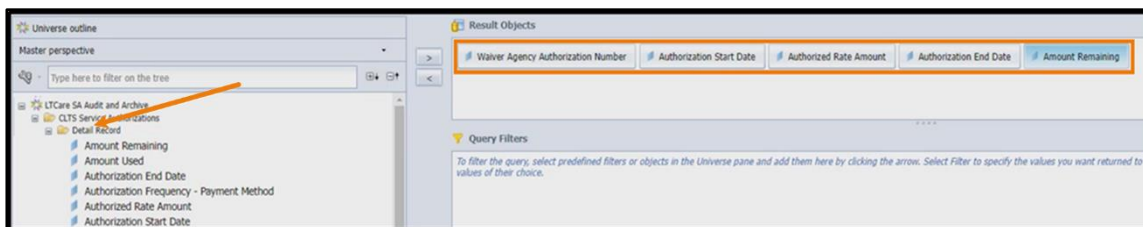


Figure 121 Result Objects Query Panel

2. Select and drag the Waiver Agency Authorization Number field into the Query Filters panel.

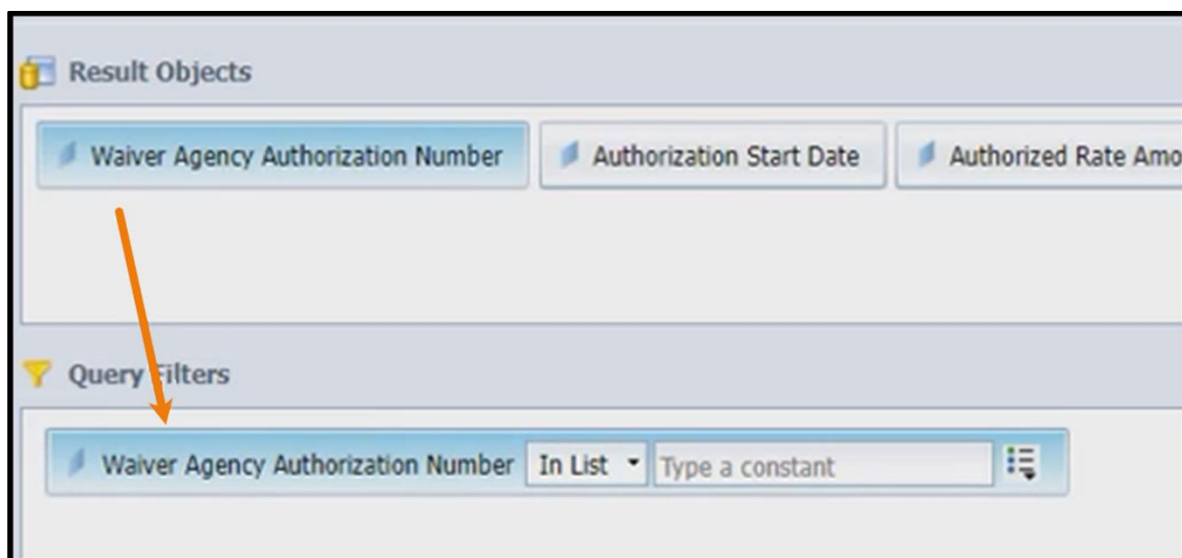


Figure 122 Query Filters Panel

3. Enter the specific authorization code or record in the box containing **Type a constant** and click the **Run Query** box in the upper right corner.

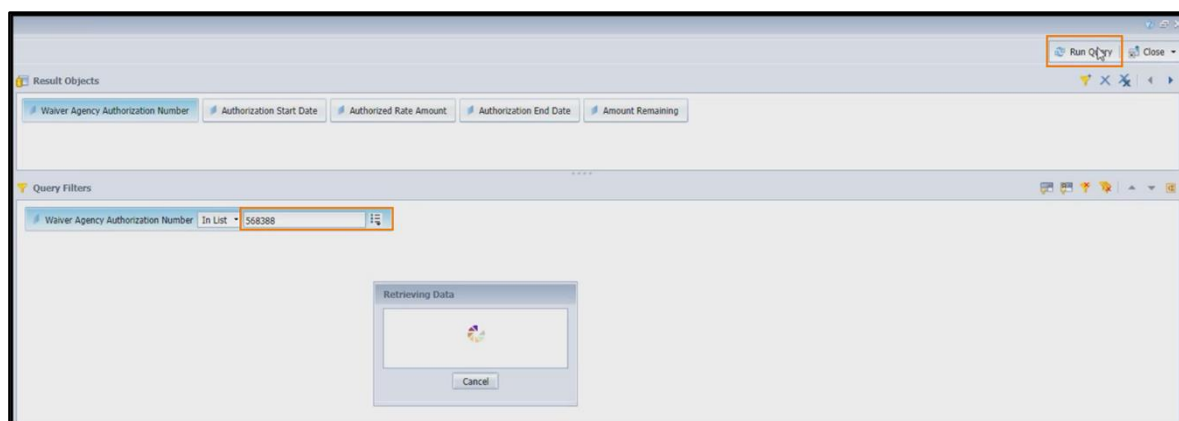
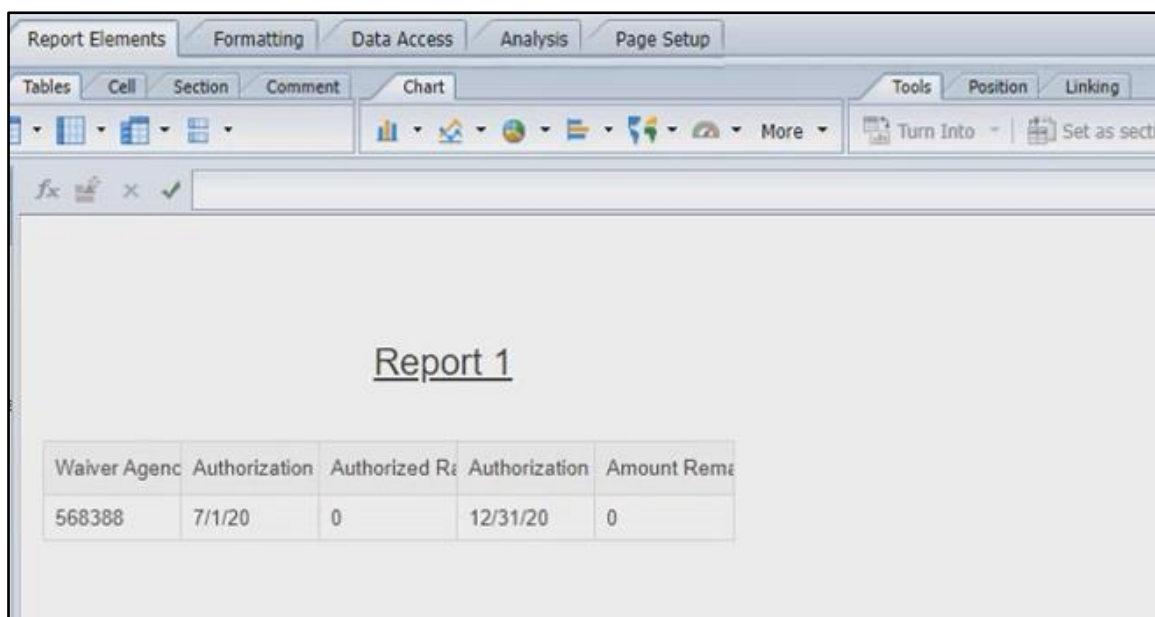


Figure 123 Query Panel—Run Query

4. A Retrieving Data box with the data will be displayed.



Waiver Agency	Authorization	Authorized Rate	Authorization End Date	Amount Remaining
568388	7/1/20	0	12/31/20	0

Figure 124 Results Panel

How to Query Remaining Service Utilization/Units on a Service Authorization

1. Click the Waiver Agency Authorization Number, Units Remaining, Units Used, and Units Approved data fields listed under the details folder. The fields will be displayed in the Result Objects Query panel.

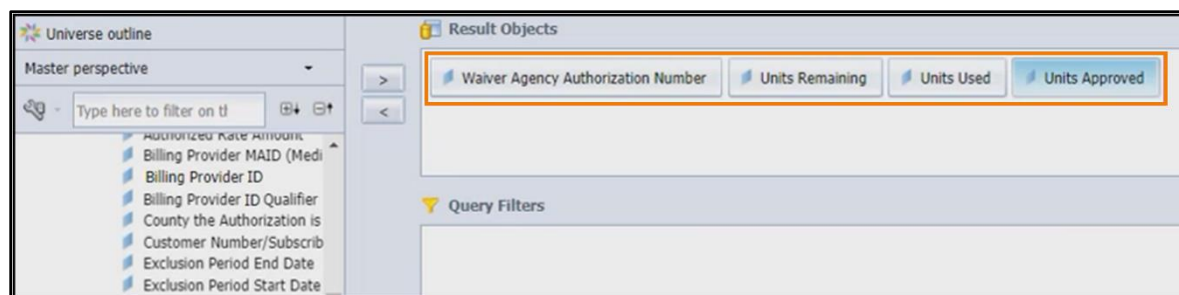


Figure 125 Result Objects Query Panel

2. Select and drag the Waiver Agency Authorization Number field into the Query Filters panel.

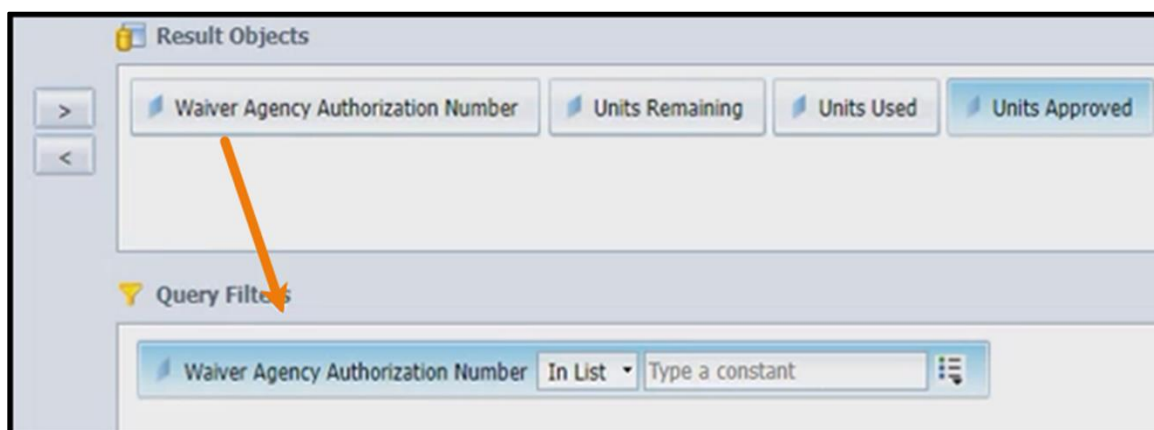


Figure 126 Query Filters Panel

3. Enter the specific authorization code or record in the box containing **Type a constant** and click the **Run Query** box in the upper right corner.

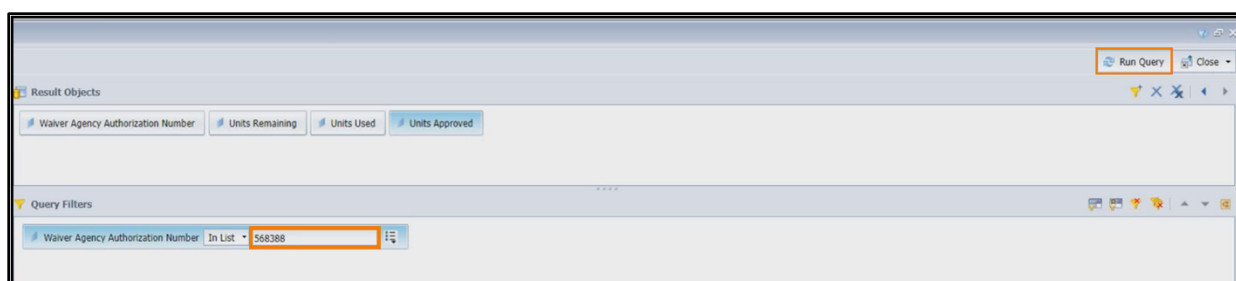


Figure 127 Query Panel—Run Query

4. A Retrieving Data box with the data will be displayed.

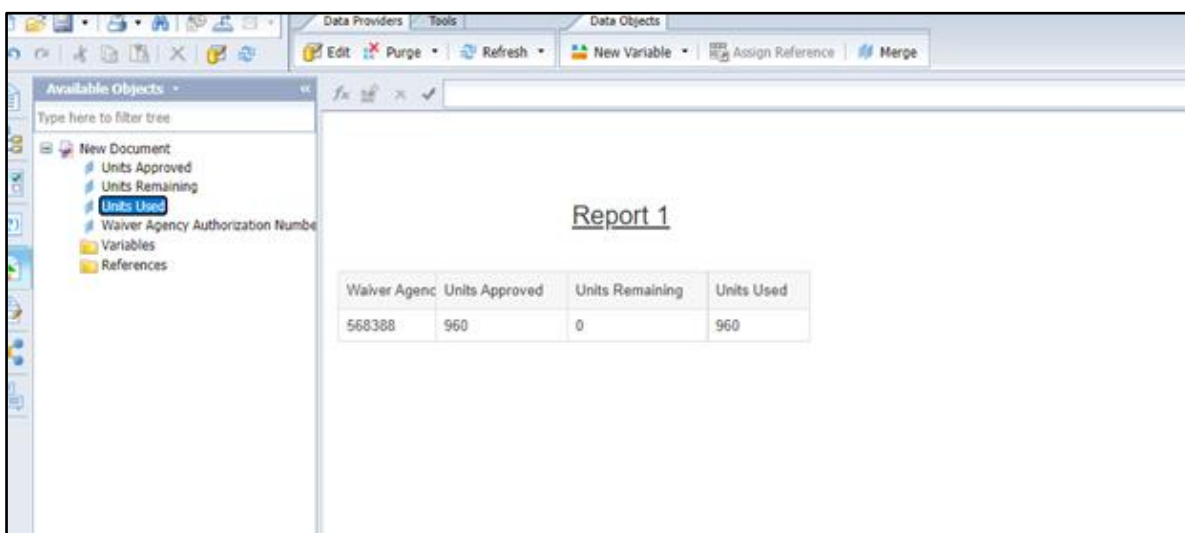


Figure 128 Results Panel

How to Query for Authorizations Over a Set Period of Time

1. Click the Authorization Start Date, Authorization End Date, Exclusion Period Start Date, and Exclusion Period End Date data fields listed under the details folder. The fields will be displayed in the Result Objects Query panel.

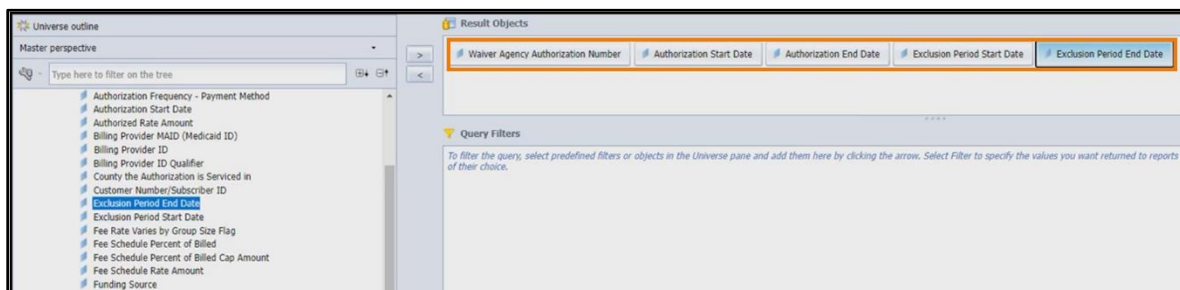


Figure 129 Query Result Objects Panel

2. Select and drag the Exclusion Period Start Date and Exclusion Period End Date fields into the Query Filters panel.

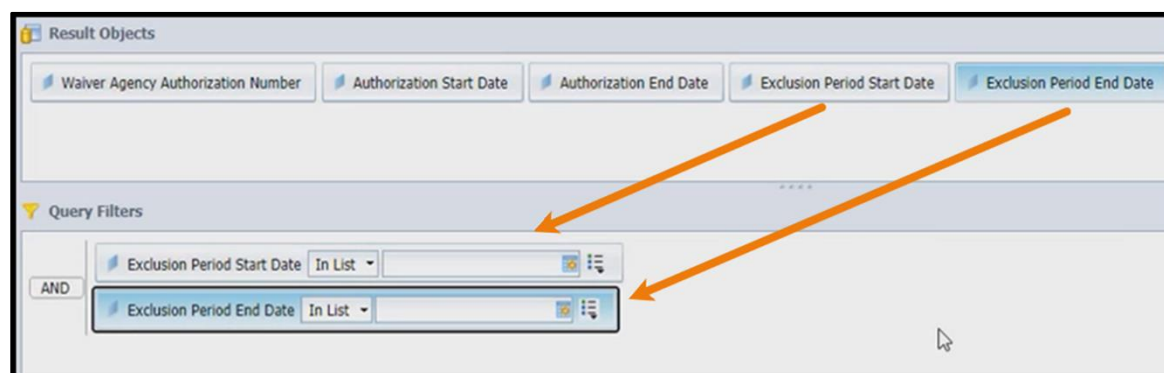


Figure 130 Result Objects Query Panel

- Click the down arrow after **In List** and select the appropriate parameters from the drop-down menu for the Exclusion Period Start Date and Exclusion Period End Date fields.

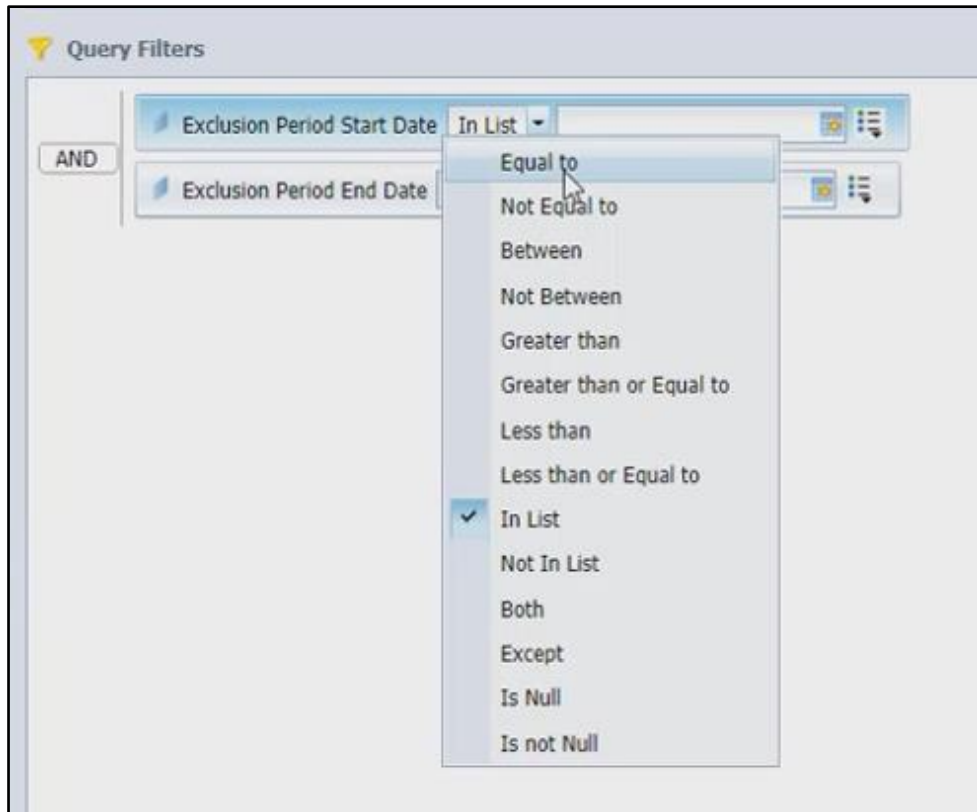


Figure 131 Query Filters Panel

- Click the calendar icon and select the dates for the Exclusion Period Start Date and Exclusion Period End Date fields.

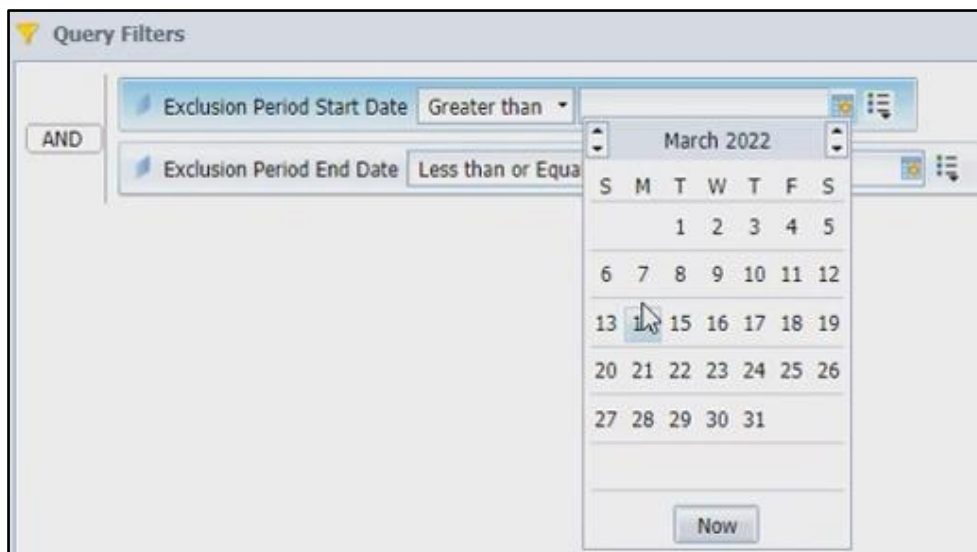


Figure 132 Query Filters—Calendar

- Click the Run Query box in the upper right corner.

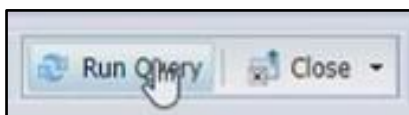


Figure 133 Run Query Box

- A Retrieving Data box with the data will be displayed.

Waiver Agency	Authorization End Date	Authorization Start Date	Exclusion Period Start Date	Exclusion Period End Date
669856	12/31/21	1/1/21		
669858	12/31/21	1/1/21	12/6/21	
669862	12/31/21	1/1/21	12/6/21	
693137	12/31/21	1/1/21	12/20/21	
693139	12/31/21	1/1/21	12/20/21	
693140	12/31/21	1/1/21	12/20/21	
697798	12/31/21	1/1/21	11/9/21	
697799	1/31/22	2/1/21	11/9/21	
718826	12/31/21	4/7/21	12/20/21	
718827	12/31/21	4/7/21	12/20/21	
741207	12/31/21	7/1/21	11/17/21	
741208	12/31/21	7/1/21	11/17/21	
741712	12/31/21	7/1/21	12/10/21	

Figure 134 Results Panel

How to Query for Authorizations by Provider and Service

1. Click the Waiver Agency Authorization Number, Service Category, Billing Provider ID, Rendering Provider ID, and Waiver Program fields listed under the details folder. The fields will be displayed in the Result Objects Query panel.

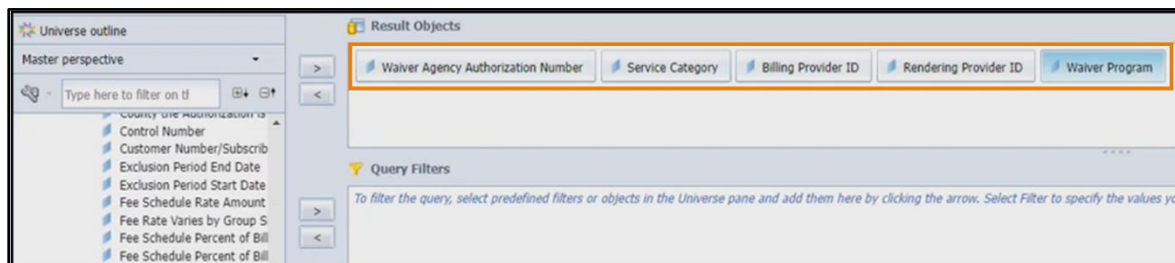


Figure 135 Query Results Objects Panel

2. Select and drag the Billing Provider ID field into the Query Filters panel.

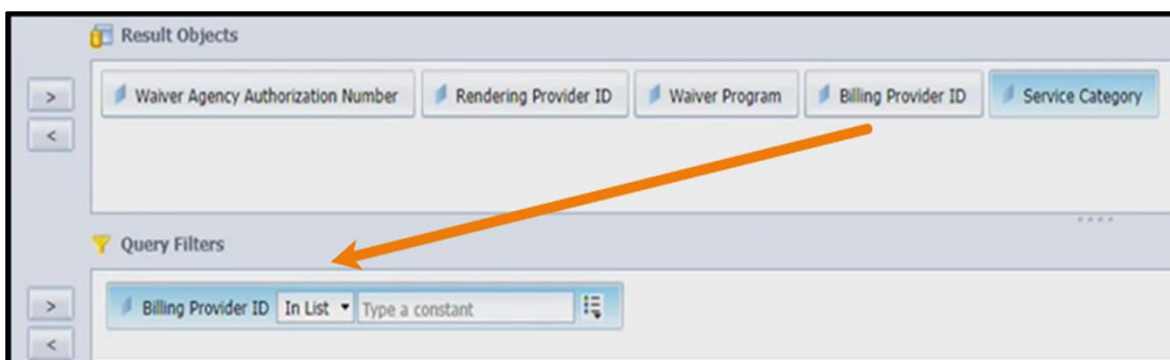


Figure 136 Query Filters Panel

3. Enter the billing provider ID in the box containing **Type a constant** and click the **Run Query** box in the upper right corner.

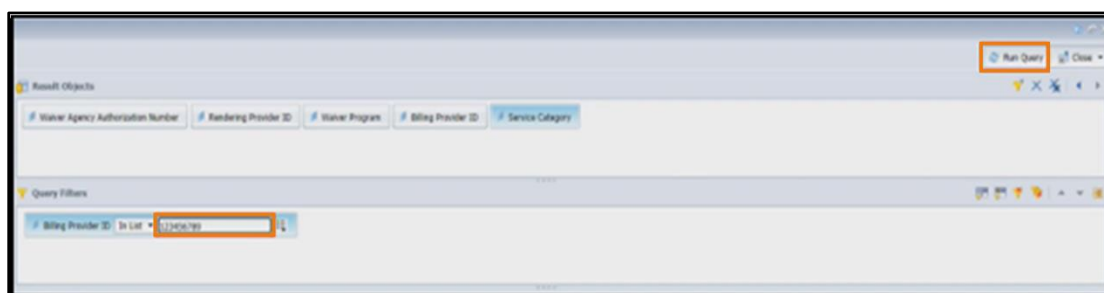
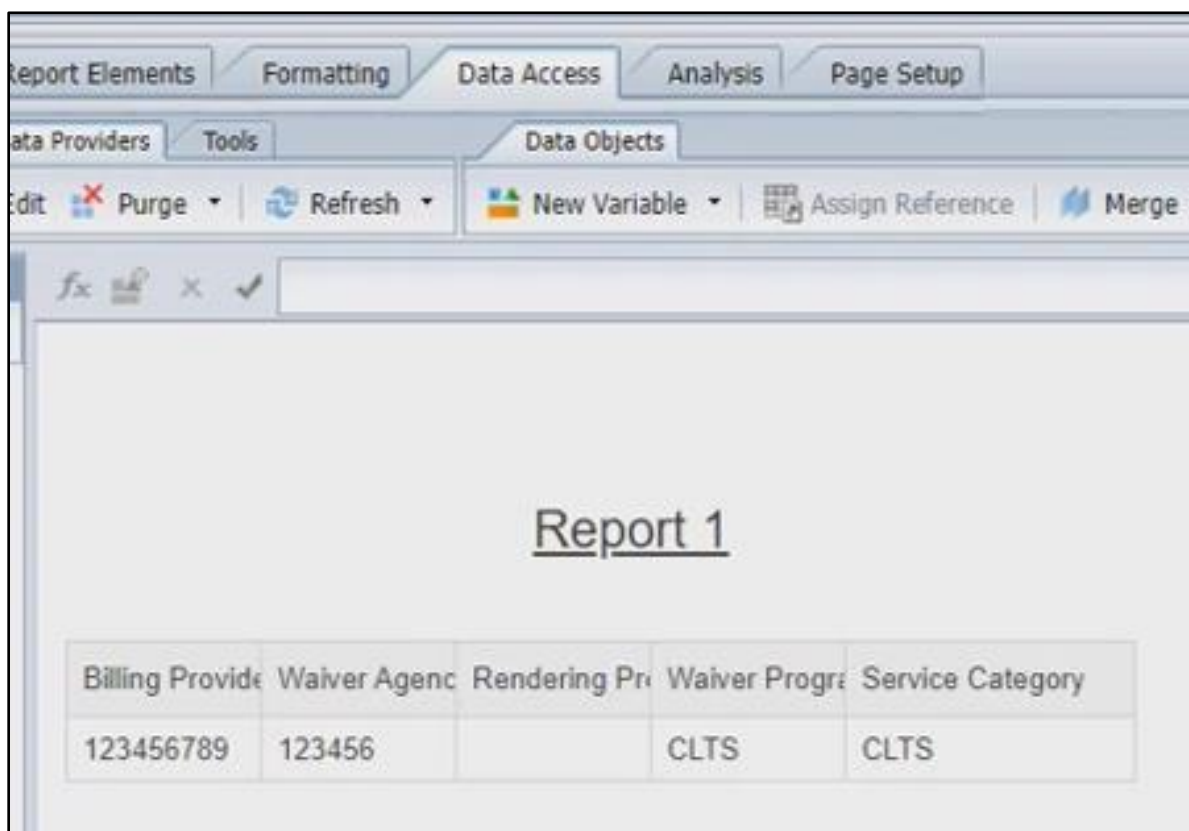


Figure 137 Query Panel—Run Query

4. Retrieving Data box with the data will be displayed.

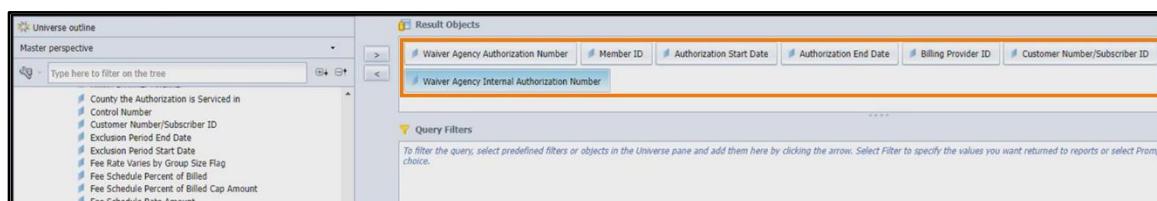


Billing Provider	Waiver Agency	Rendering Provider	Waiver Program	Service Category
123456789	123456		CLTS	CLTS

Figure 138 Results Panel

How to Query for Authorizations by Participant

1. Click the Waiver Agency Authorization Number, Member ID, Authorization Start Date, Authorization End Date, Billing Provider ID, Customer Number/Subscriber ID, and Waiver Agency Internal Authorization Number fields listed under the details folder. The fields will be displayed in the Result Objects Query panel.



Query Results Objects Panel

2. Select and drag the Member ID field into the Query Filters panel.

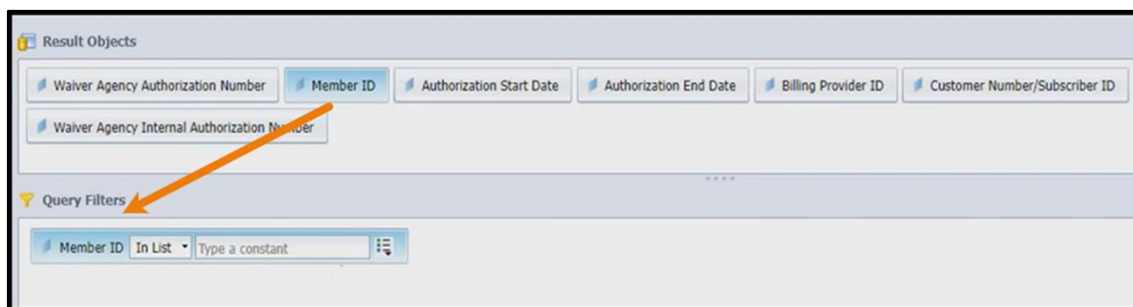


Figure 139 Query Filter Panel

3. Enter the member ID in the box containing **Type a constant** and click the **Run Query** box in the upper right corner.

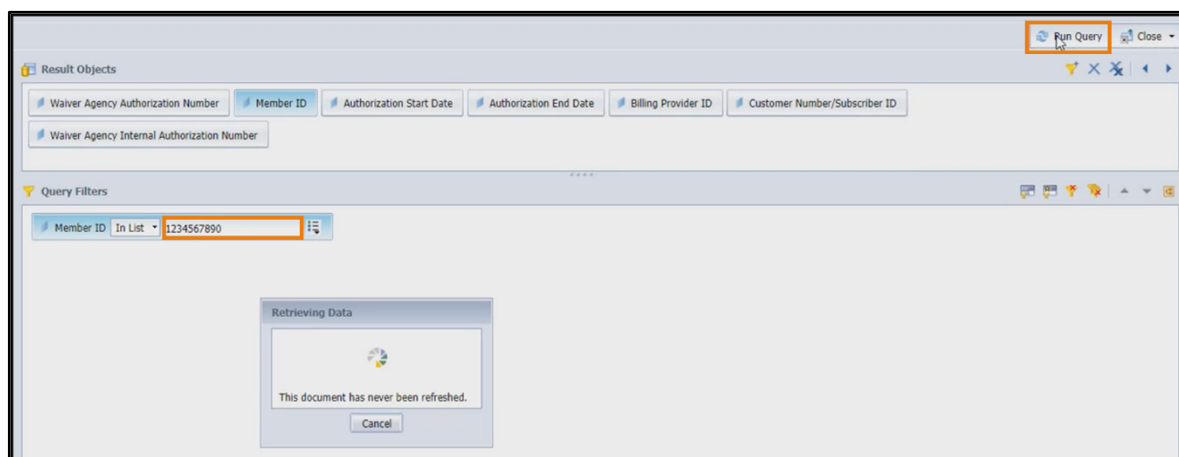
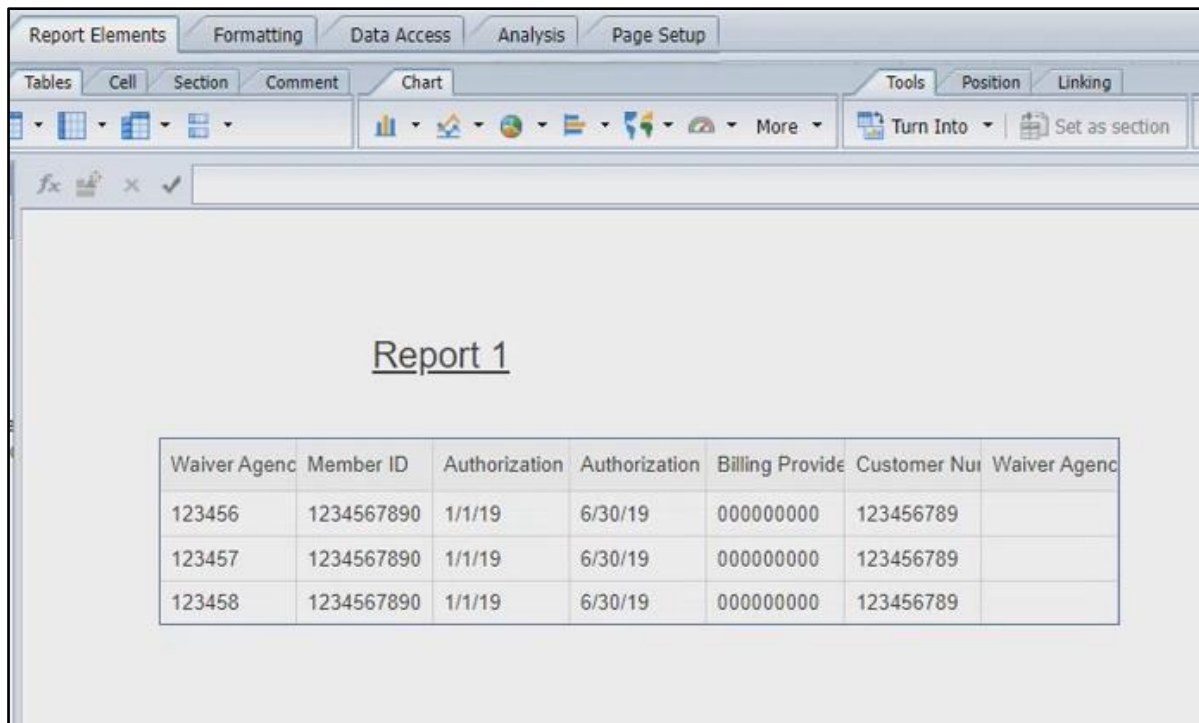


Figure 140 Query Panel—Run Query

4. A Retrieving Data box with the data will be displayed.



The screenshot shows a software interface with a menu bar at the top containing 'Report Elements', 'Formatting', 'Data Access', 'Analysis', and 'Page Setup'. Below the menu bar is a ribbon with tabs for 'Tables', 'Cell', 'Section', 'Comment', 'Chart', 'Tools', 'Position', and 'Linking'. The 'Chart' tab is active, showing icons for various chart types and a 'More' dropdown. Below the ribbon is a formula bar with 'fx' and a checkmark icon. The main area of the interface displays the title 'Report 1' in a large, bold font. Below the title is a table with the following data:

Waiver Agenc	Member ID	Authorization	Authorization	Billing Provide	Customer Nui	Waiver Agenc
123456	1234567890	1/1/19	6/30/19	000000000	123456789	
123457	1234567890	1/1/19	6/30/19	000000000	123456789	
123458	1234567890	1/1/19	6/30/19	000000000	123456789	

Figure 141 Results Panel

15 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 by ForwardHealth 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.

15.1 Waiver Letters

1. On the Secure Waiver Agency page, click **Letters** under Quick Links.

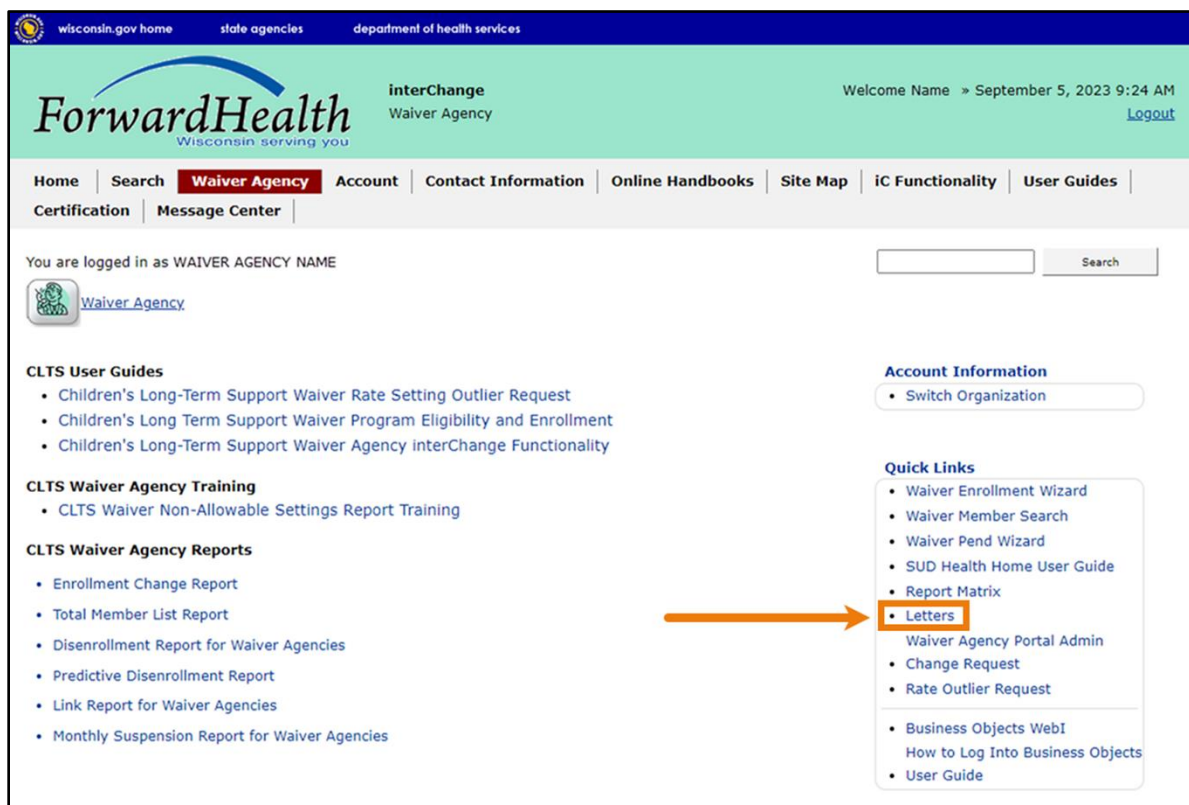


Figure 142 Secure Waiver Agency Page

The Waiver Letter page will be displayed.

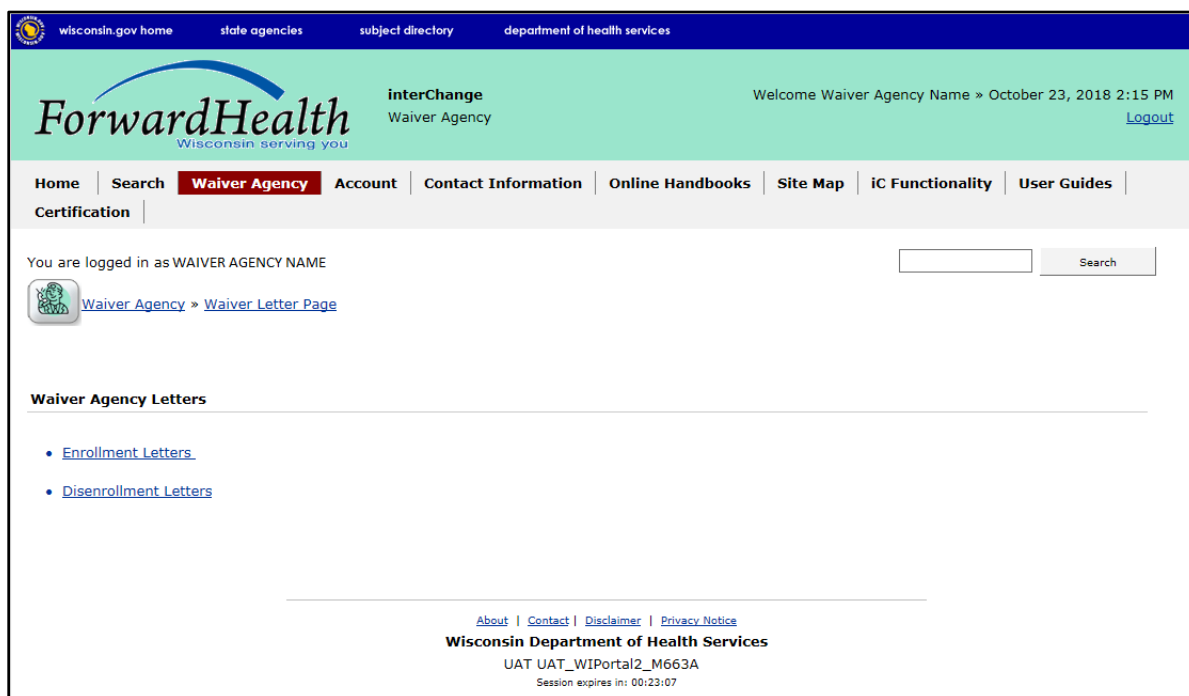


Figure 143 Waiver Letter Page

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.

16 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 Special Supplemental Nutrition Program for Women, Infants, and Children [WIC])

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, 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 and 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 automatically 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, 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 (that is, add or change) information in an open enrollment.

End Waiver Enrollment: This option is used to end (that is, 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 (for example, 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.

17 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.

CLTS Outlier Request County Submitter: This role is assigned to a user who works for a county and allows the user to create and submit CRSORs. This role is abbreviated as **CLTS Out Req Cnty** on the Portal.

CLTS Outlier Request LSS Asst Submitter: This role is assigned to a user who works for a Waiver Agency sub-contracted organization and allows the user to create and submit CRSORs. This role is abbreviated as **CLTS Out Req LSSAsst** on the Portal.

CLTS Outlier Request County Approver: This role is assigned to a user who works for a county and allows the user to both submit and approve CRSORs. This role is abbreviated as **CLTS Out Req CtyAppr** on the Portal.

CLTS Outlier Request LSS Approver: This role is assigned to a user who works for a Waiver Agency sub-contracted organization and allows the user to both submit and approve CRSORs. This role is abbreviated as **CLTS Out Req LSSAppr** on the Portal.

Note: If a county chooses, a user may act as both a submitter and an approver. The approver roles allow a user to function as both submitter and approver for CRSORs. Only one CRSOR role may be assigned to each clerk user.

Waiver Agency Info—Read Only: This role allows the user to view Waiver Agency information particular to the user's current agency but does 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 particular to the user's current 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.

DSS Access Management: This role allows the user to use the DSS Access Management wizard to assign agency users with the Data Warehouse role access to the appropriate (and available) Data Marts.

Data Warehouse: This role allows users to be seen in the DSS Access Management wizard and be granted access to a Data Mart by a user with the DSS Access Management role.

18 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.

Reason Code	Reason Code Description	MGD Letter	Letter Description	Entry Method
23	Member has Aged Out of the Program	MGD-9720-R	CLTS Disenrollment Notice	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.
26	System Assigned—Waiver Reassignment	MGD-9710-R	CLTS Confirmation Notice	Start reason is set automatically when a member's enrollment is automatically resigned without a gap in coverage.
61	Reestablished Functional Eligibility	MGD-9710-R	CLTS Confirmation Notice	Start reason is set automatically when a member regains functional eligibility. Not currently in use.
62	Reestablished Financial Eligibility	MGD-9710-R	CLTS Confirmation Notice	Start reason is set automatically when a member regains financial eligibility. Not currently in use.
63	Disenroll—Missing Functional Eligibility	MGD-9720-R	CLTS Disenrollment Notice	End reason is set automatically when a member is missing functional eligibility. Not currently in use.
64	DOD (Date of Death)	NONE	NONE	End reason can be entered manually or is set automatically when a date of death is received. No notice is sent.
65	No Medicaid Eligibility	MGD-9720-R	CLTS Disenrollment Notice	End reason is currently manually entered. Notice is sent to the member with the next weekly letter generation batch.

Reason Code	Reason Code Description	MGD Letter	Letter Description	Entry Method
66	Not Functionally Eligible	MGD-9720-R	CLTS Disenrollment Notice	End reason is currently manually entered. Notice is sent to the member with the next weekly letter generation batch.
67	Released from Incarceration	MGD-9710-R	CLTS Confirmation Notice	Start reason can be selected when entering enrollment. Notice is sent to the member with the next weekly generation batch.
2A	Transition to an Adult Long Term Care Program	MGD-9720-R	CLTS Disenrollment Notice	End reason is manually entered. Notice is sent to the member with the next weekly letter generation batch.
2D	Waiver Agency Transfer	MGD-9710-R –OR– NONE	CLTS Confirmation Notice –OR– NONE	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.
2G	Member Placed in a Non-Eligible Setting	MGD-9720-R	CLTS Disenrollment Notice	End reason is manually entered. Notice is sent to the member with the next weekly letter generation batch.
2J	Enrolled from Waitlist	MGD-9710-R	CLTS Confirmation Notice	Start reason is selected when entering enrollment. Notice is sent to the member with the next weekly generation batch.
2K	Returned from Ineligible Setting	MGD-9710-R	CLTS Confirmation Notice	Start reason can be selected when entering enrollment. Notice is sent to the member with the next weekly generation batch.
2L	New Enrollment	MGD-9710-R	CLTS Confirmation Notice	Start reason is entered manually when adding enrollment. Notice is sent to the member with the next weekly letter generation batch.

Reason Code	Reason Code Description	MGD Letter	Letter Description	Entry Method
2S	SUD HH Voluntary Enrollment	NONE	NONE	For hub-and-spoke (SUD HH), the start reason is used on the waiver enrollment panel when setting the SUD HH enrollment. No notice is sent.
2T	SUD HH Voluntary Disenrollment	NONE	NONE	For SUD HH, the stop reason is used on the waiver enrollment panel in situations when the enrollment is ended voluntarily. No notice is sent.
2U	SUD HH Disenrollment—Program Completion	NONE	NONE	For SUD HH, this stop reason is used on the waiver enrollment panel to indicate the program has been completed. No notice is sent.
2V	SUD HH Disenrollment—Member No Longer Participating	NONE	NONE	For SUD HH, this stop reason is used on the waiver enrollment panel to indicate the member is no longer participating in the program. No notice is sent.
7N	No Annual Screen Completed	MGD-9720-R	CLTS Disenrollment Notice	End reason is set automatically when a member's annual screen is not completed on time. Not currently in use.
7O	Moved Out of State	MGD-9720-R	CLTS Disenrollment Notice	End reason is currently manually entered. Notice is sent to the member with the next weekly letter generation batch.
7P	No Longer Accepting Services	MGD-9720-R	CLTS Disenrollment Notice	End reason is manually entered. Notice is sent to the member with the next weekly letter generation batch.