User Guide

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

April 28, 2025

WISCONSIN DEPARTMENT of HEALTH SERVICES

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1 Getting Started

Both public and secure information is accessible through the ForwardHealth Portal (the 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 (BCS), 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 enrollment dates, recertification dates, level of care (LOC), and monthly parental fees should contact the BCS Technical Assistance Center (TAC) at DHSBCSTAC@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/.

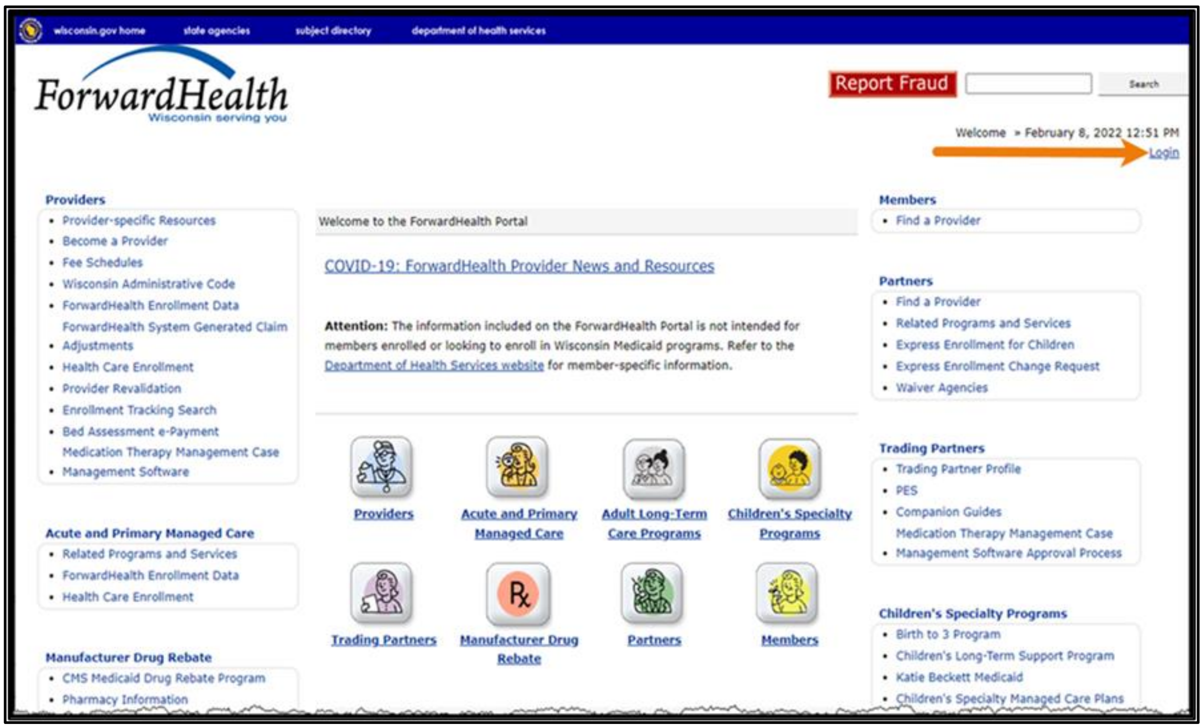


Figure 1 ForwardHealth Portal Homepage

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

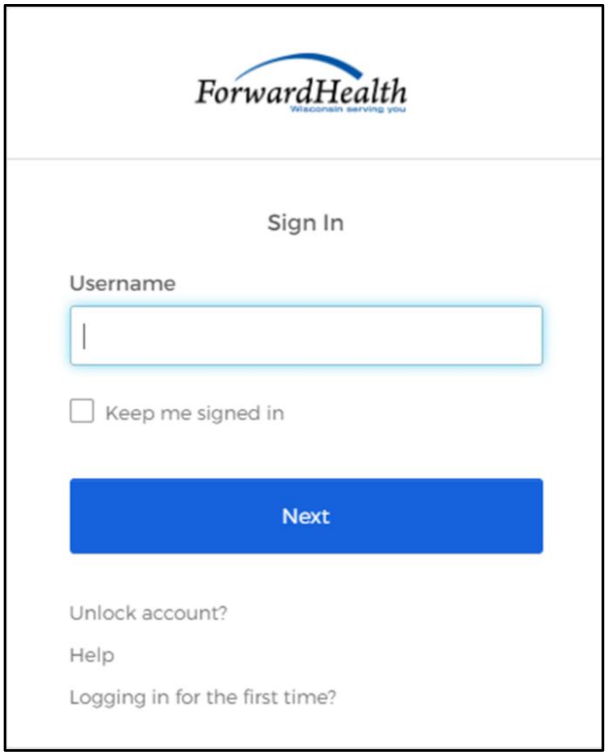


Figure 2 Sign In Box

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.

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

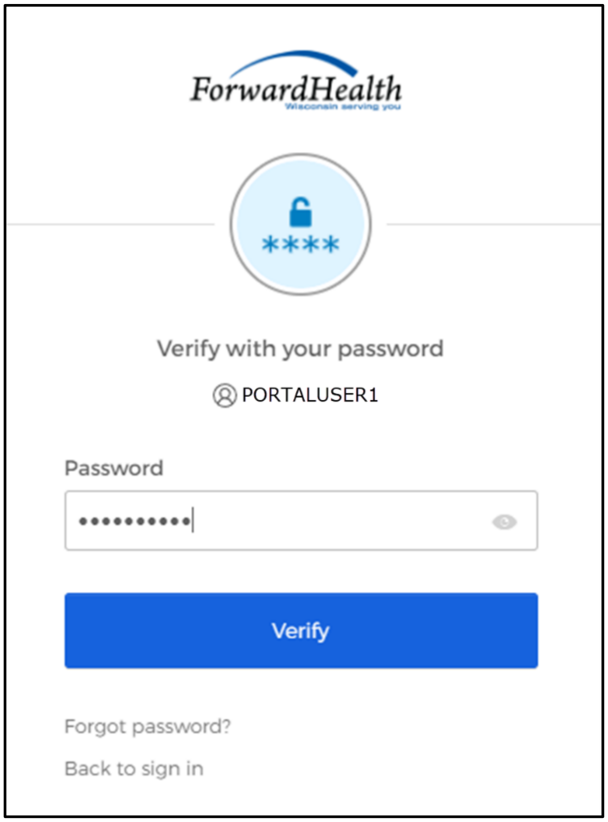


Figure 3 Verify With Your Password Box

5. Enter the user's password.

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

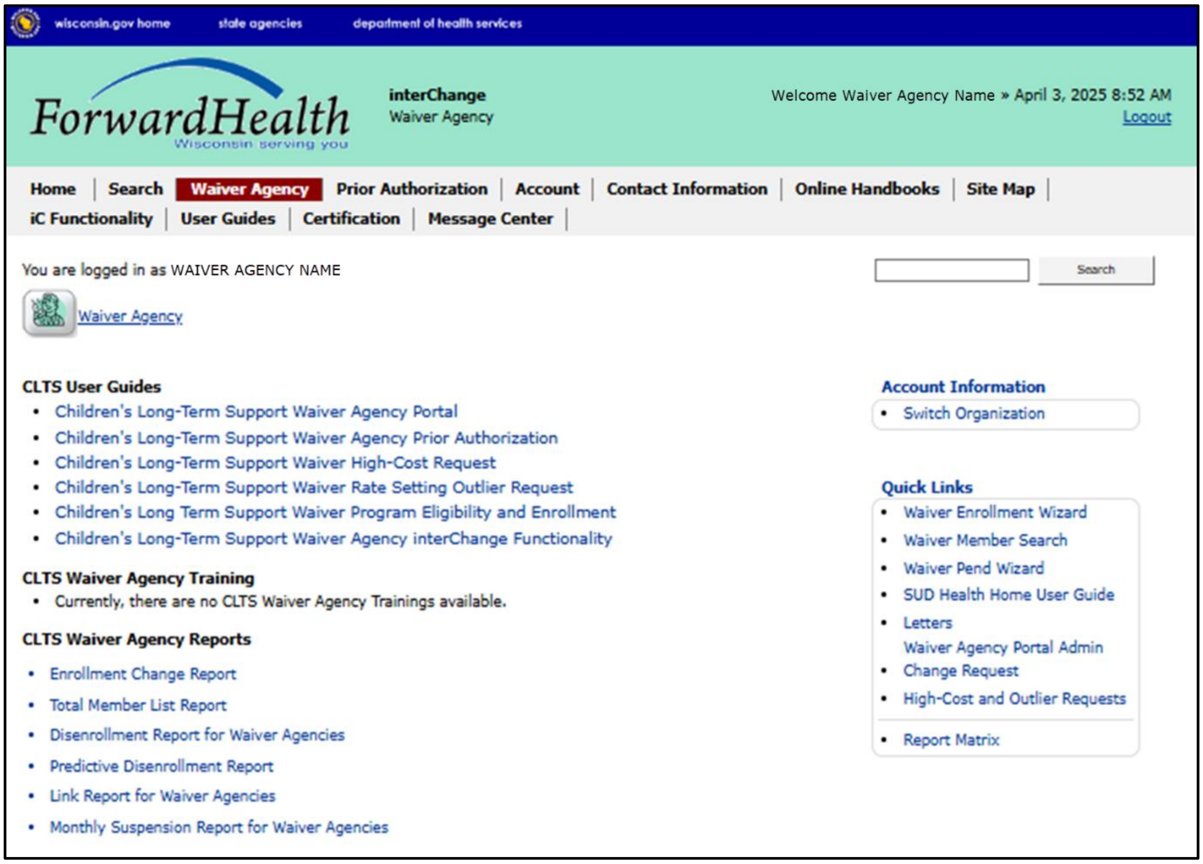


Figure 4 Secure Waiver Agency Page

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.

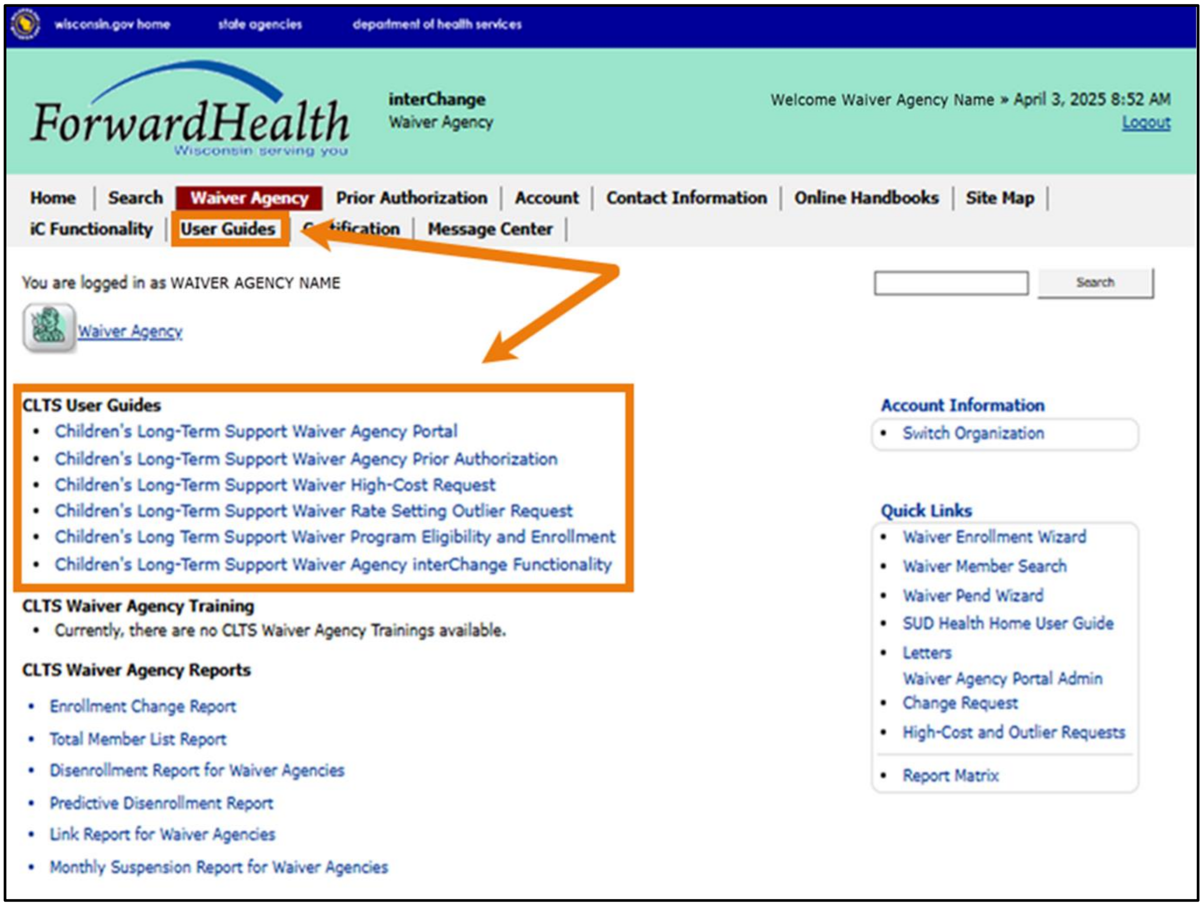


Figure 5 Secure Waiver Agency Page

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.

Note: Users who work under one waiver agency will not need to use this functionality.

3.1 Search and Switch to Organization

1. Click **Account** on the main menu at the top of the page. The Account Home page will be displayed.

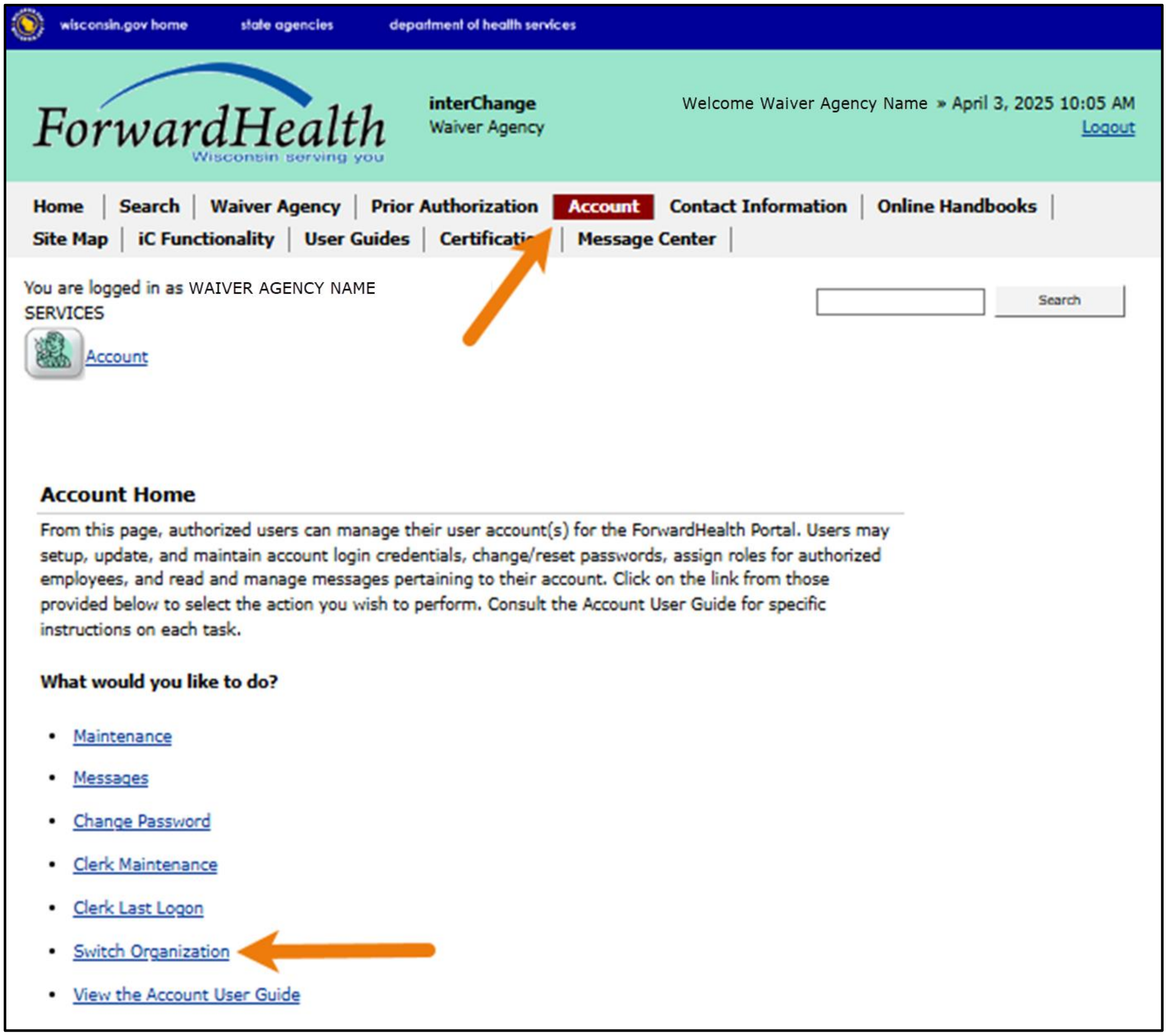


Figure 6 Account Home Page

2. On the Account Home Page, click **Switch Organization**. The Select Account page will be displayed.

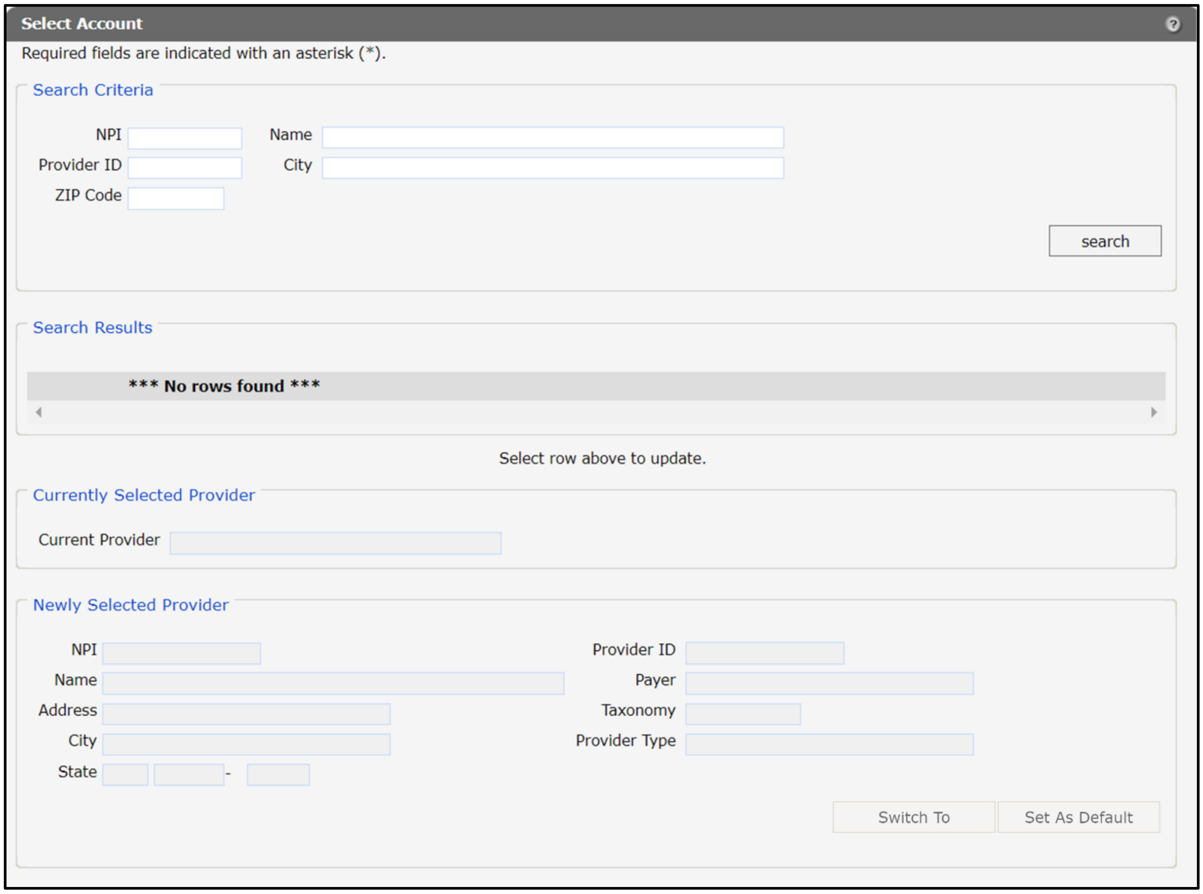


Figure 7 Select Account Page

Fields on the Select Account 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.

3. Enter any of the following search criteria for the organization in any combination in the "Search Criteria" section.
    - NPI
    - Provider ID
    - ZIP Code
    - Name
    - City
4. Click **search**. The organization(s) will be listed under the "Search Results" section.

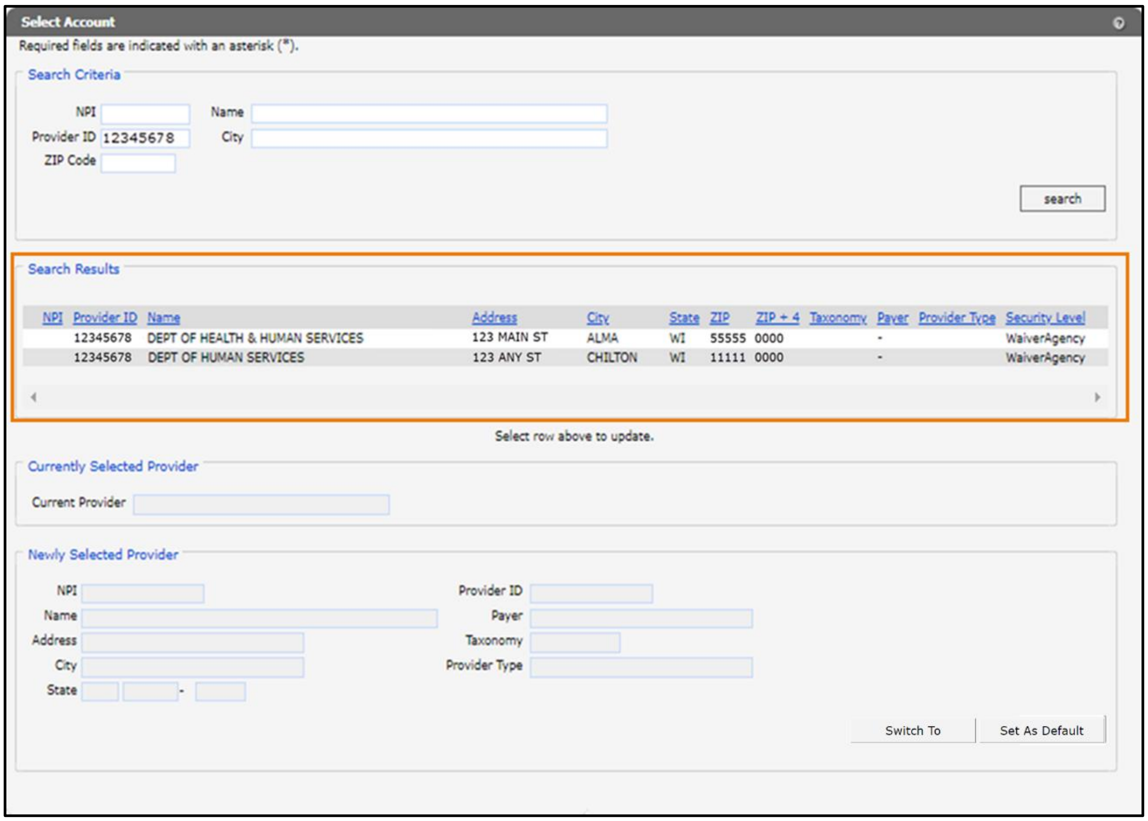


Figure 8 Select Account Page—Search Results

5. Click the row containing the appropriate organization. The organization's information will auto-populate in the "Currently Selected Provider" and "Newly Selected Provider" sections. Note: If only one organization is listed under the "Search Results" section, the "Newly Selected Provider" section will auto-populate with the organization's information.

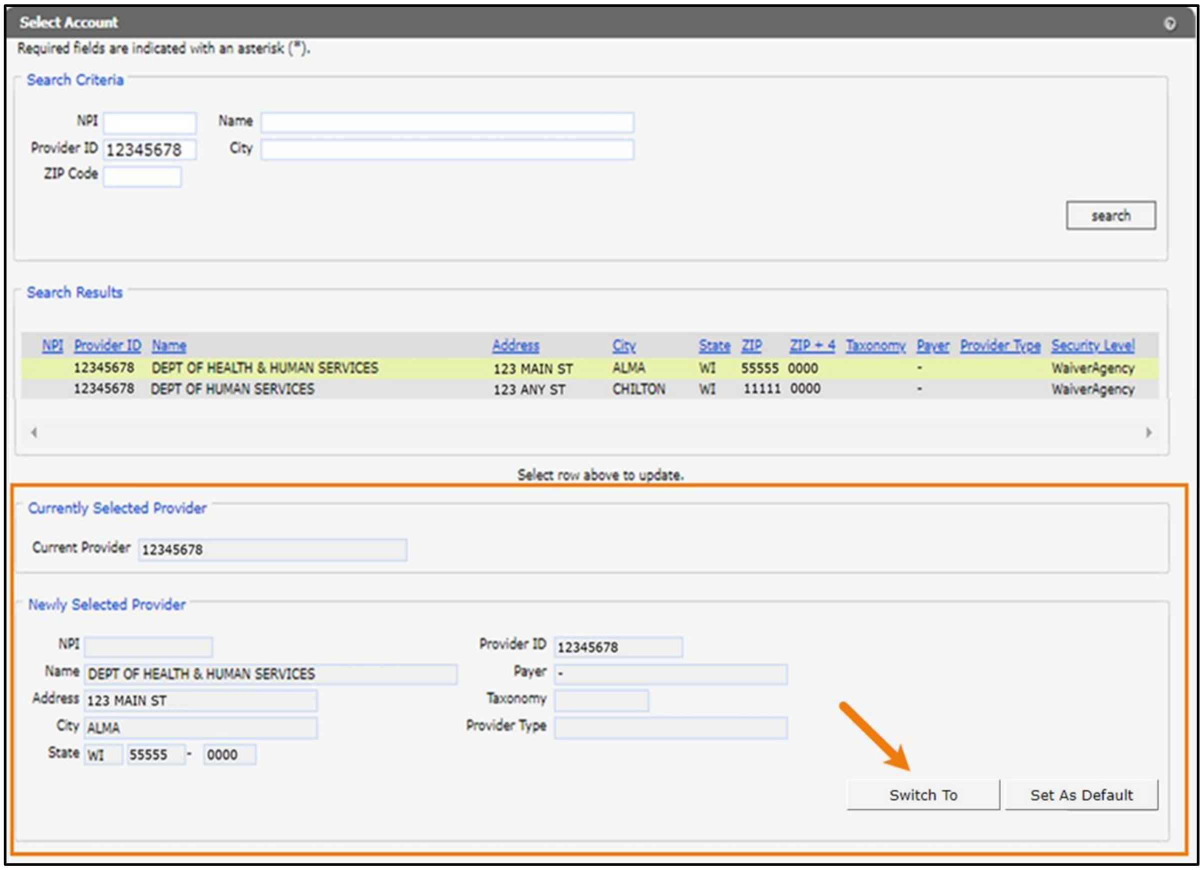


Figure 9 Select Account Page—Populated

6. If the user wishes to switch to the selected organization's account, click **Switch To**.
7. 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**.

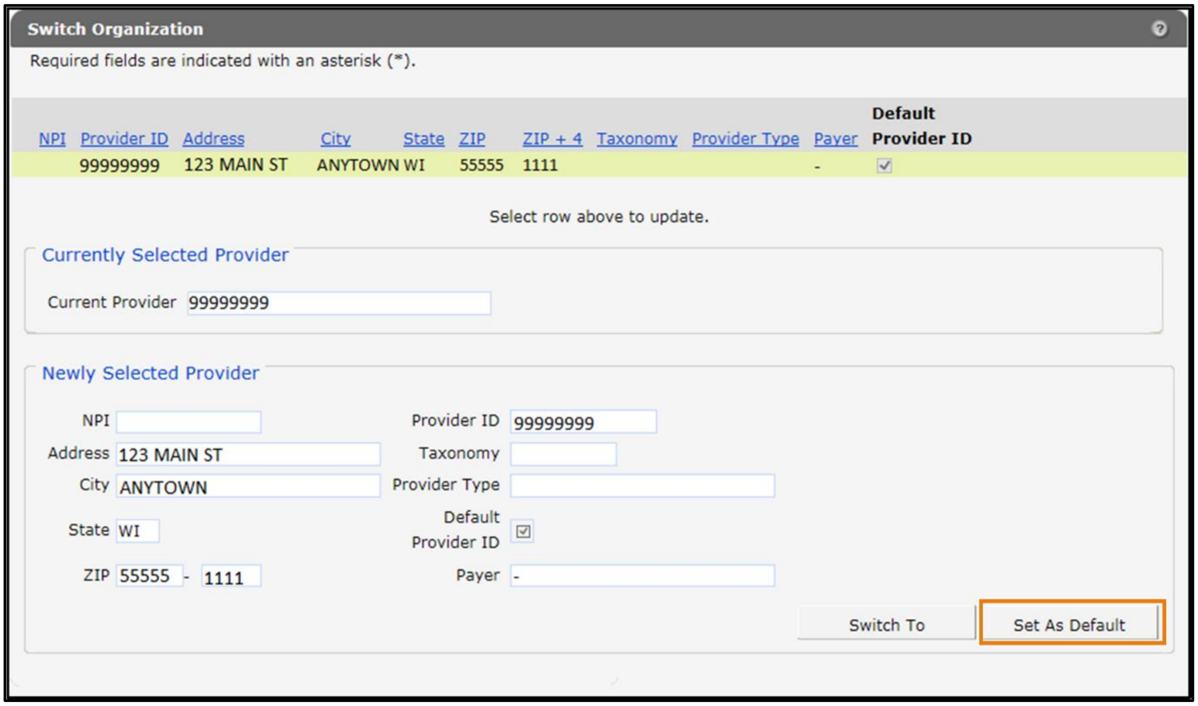


Figure 10 Switch Organization Panel With Auto-Populated Information

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

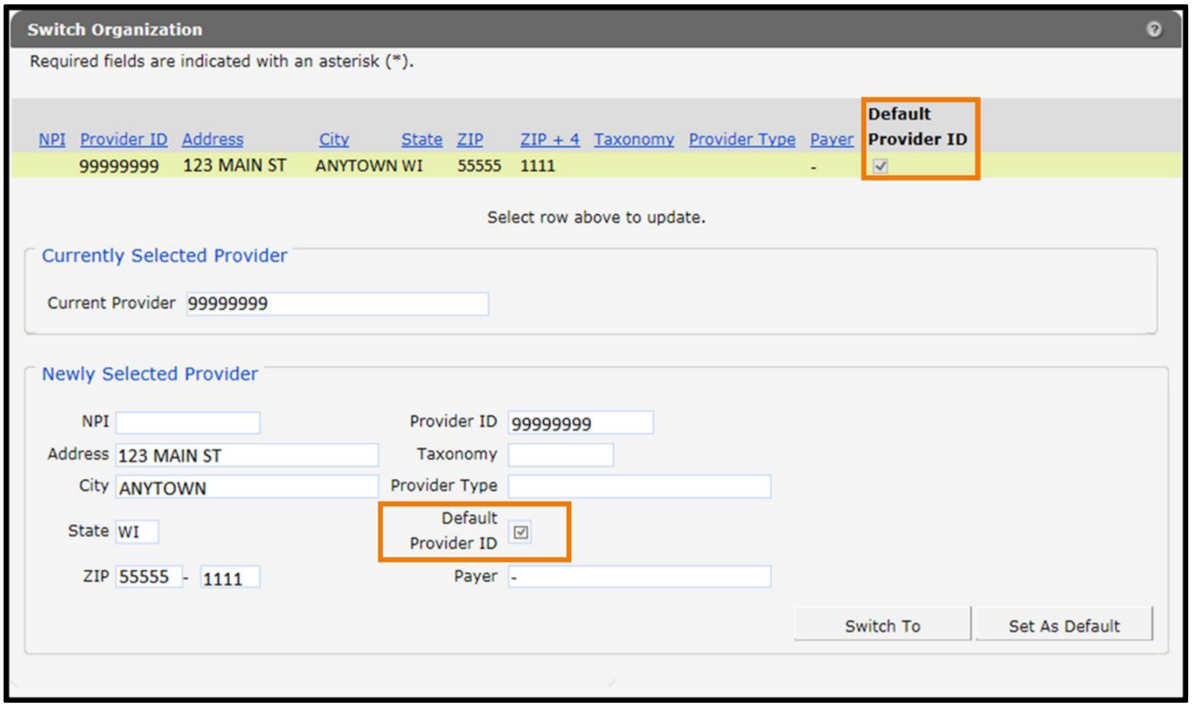


Figure 11 Switch Organization Panel

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**.

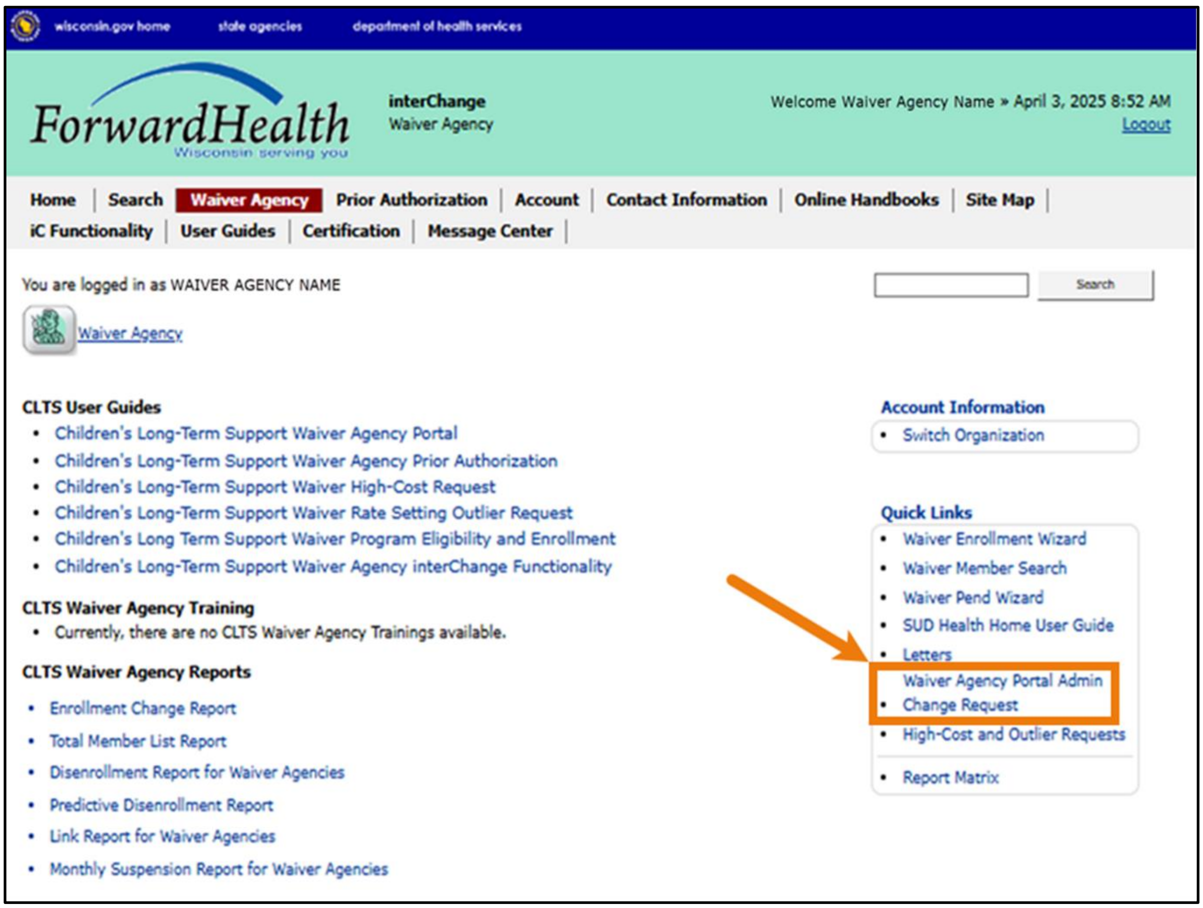


Figure 12 Secure Waiver Agency Page

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

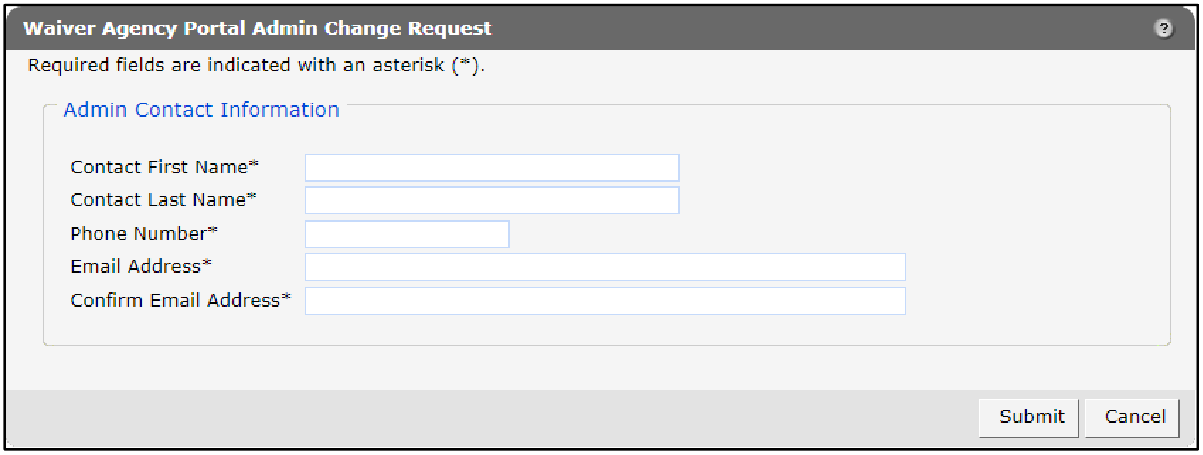


Figure 13 CLTS Waiver Agency Portal Admin Change Request Panel

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.

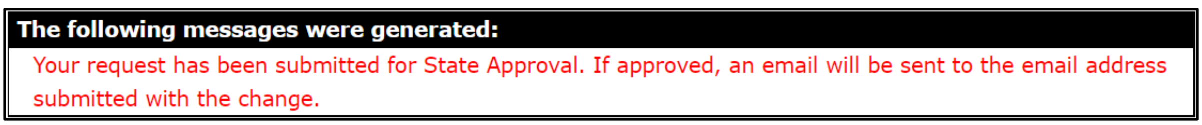
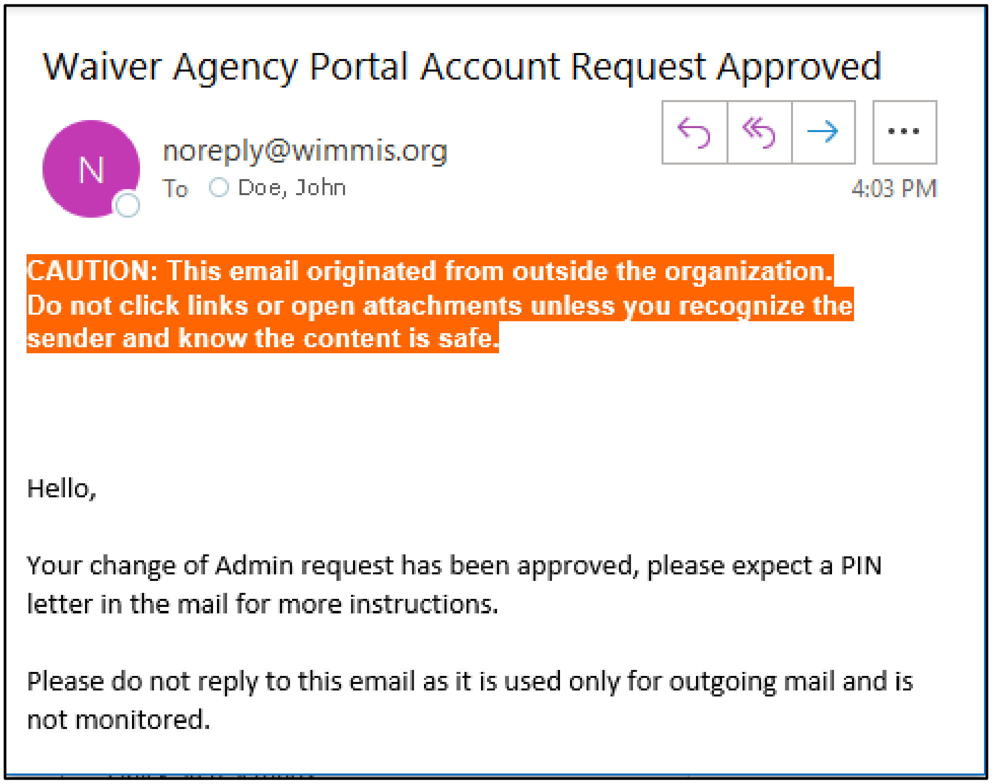


Figure 14 Confirmation Message

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 BCSTAC inbox at DHSBCSTAC@dhs.wisconsin.gov if they do not have anyone with access to the waiver agency Portal that can submit the request.


Waiver Agency Portal Account Request Approved

N noreply@wimmis.org
To Doe, John
4:03 PM

CAUTION: This email originated from outside the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hello,

Your change of Admin request has been approved, please expect a PIN letter in the mail for more instructions.

Please do not reply to this email as it is used only for outgoing mail and is not monitored.

Figure 15 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**.

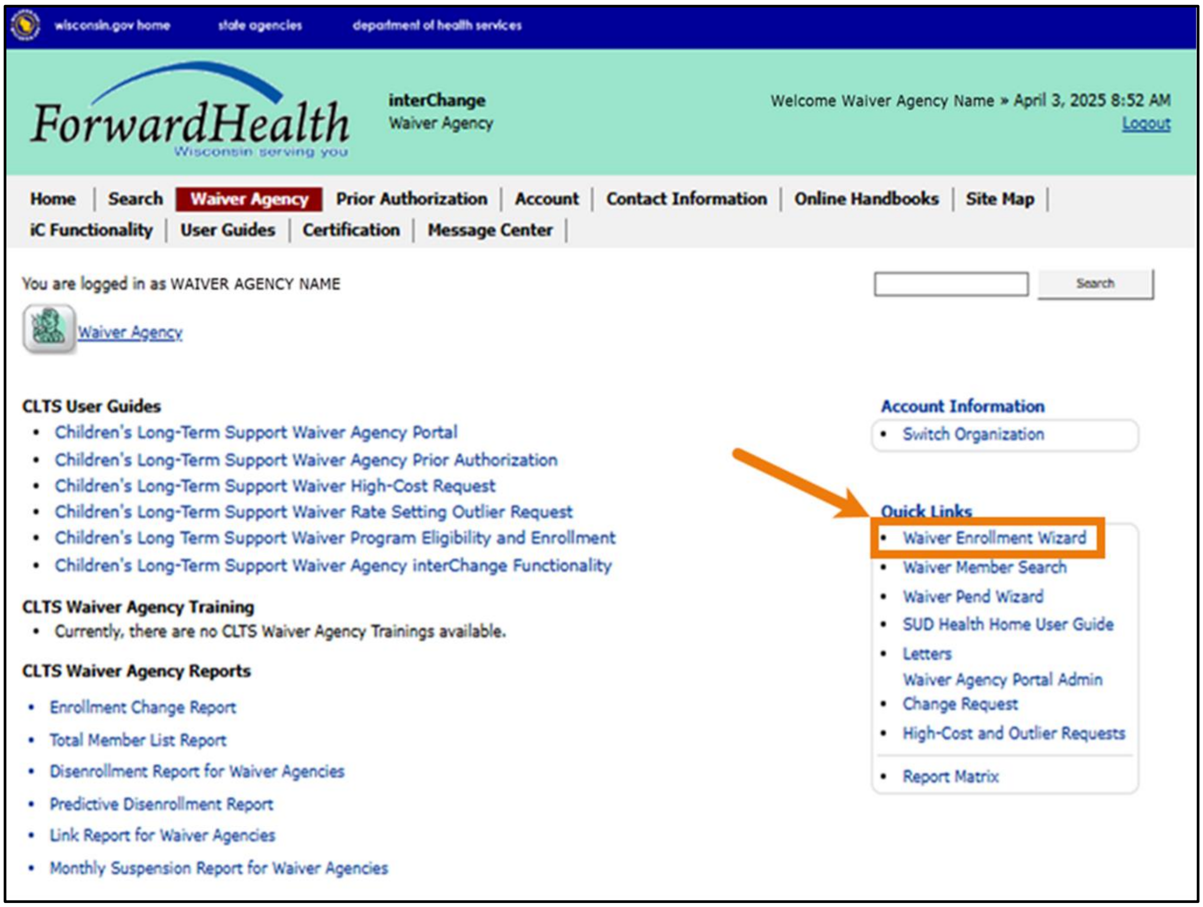


Figure 16 Secure Waiver Agency Page

The Member Search panel will be displayed.

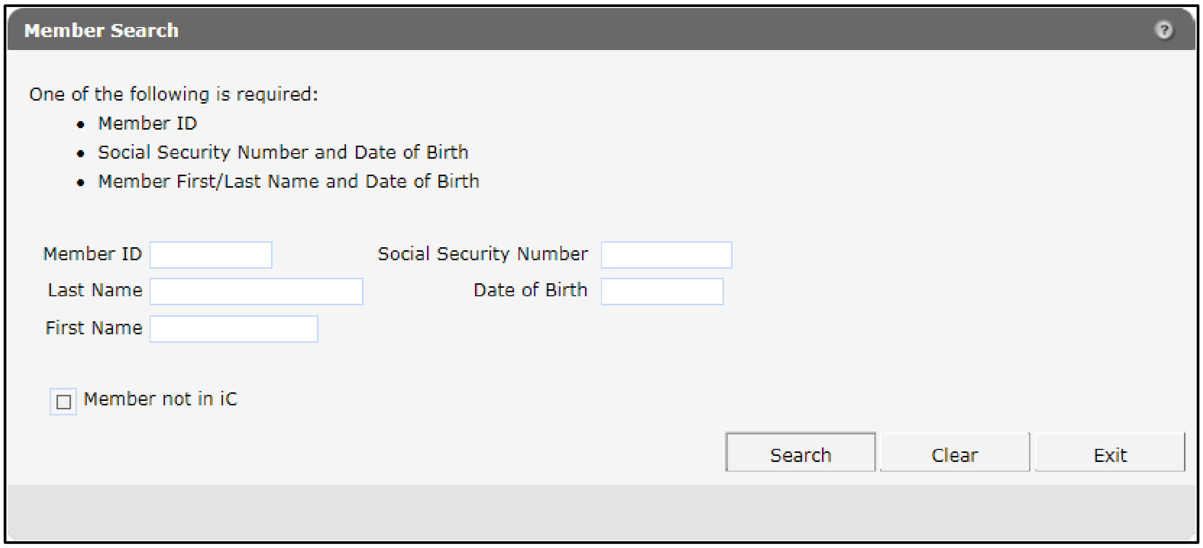


Figure 17 Member Search Panel

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.

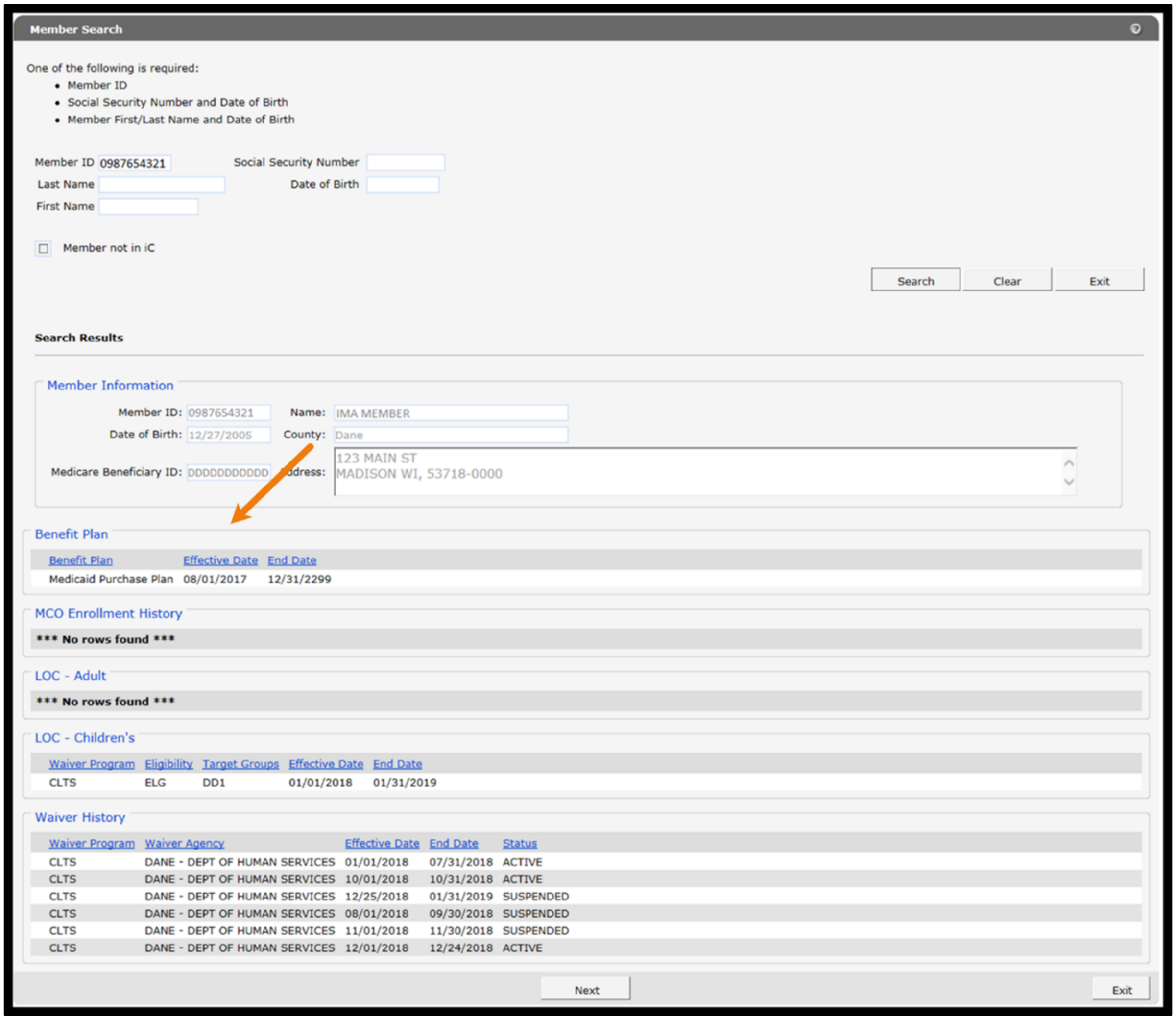


Figure 18 Member Search Panel With "Search Results" Section

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.

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.

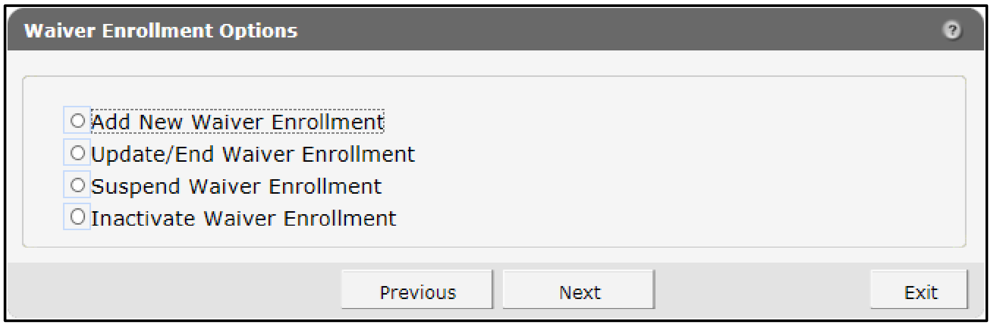


Figure 19 Waiver Enrollment Options Panel

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**.

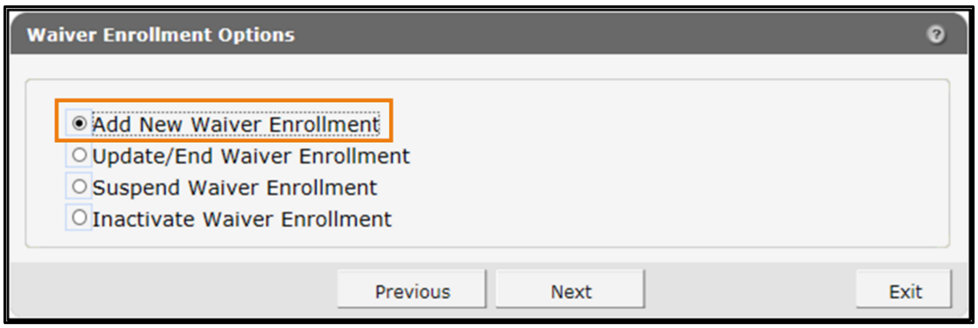


Figure 20 Waiver Enrollment Options Panel

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

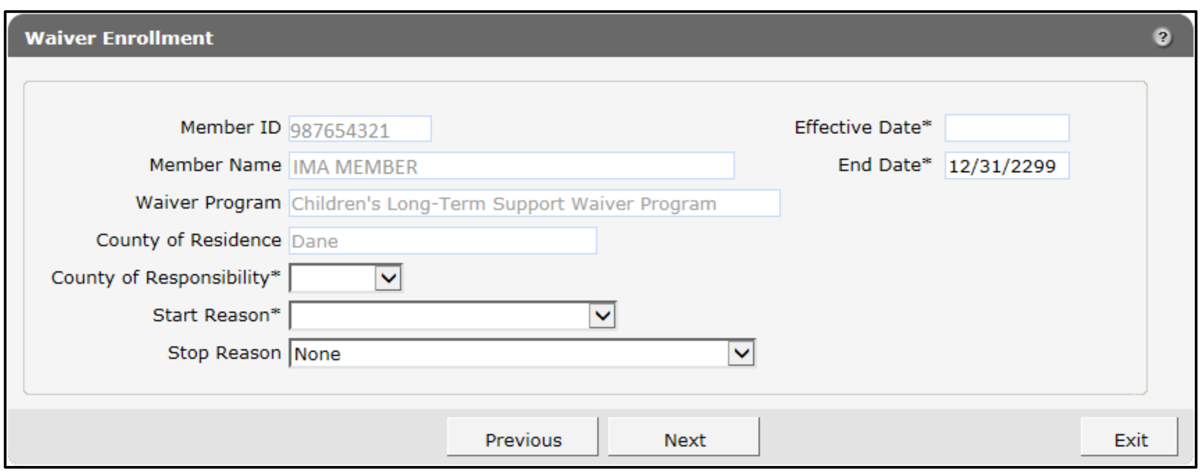


Figure 21 Waiver Enrollment Panel

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.

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

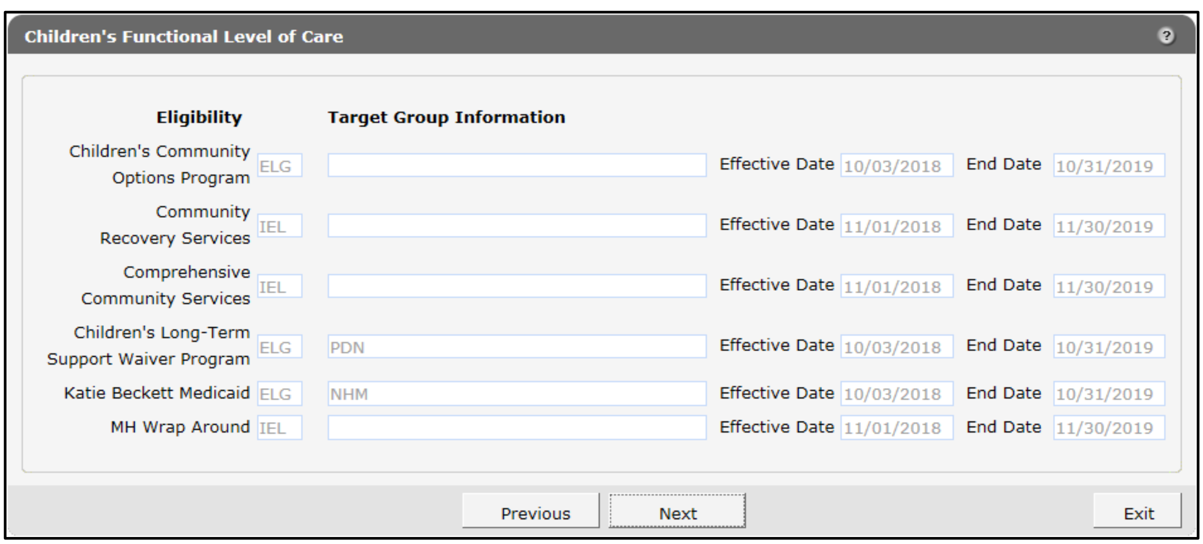


Figure 22 Children's Functional Level of Care Panel

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

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

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

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

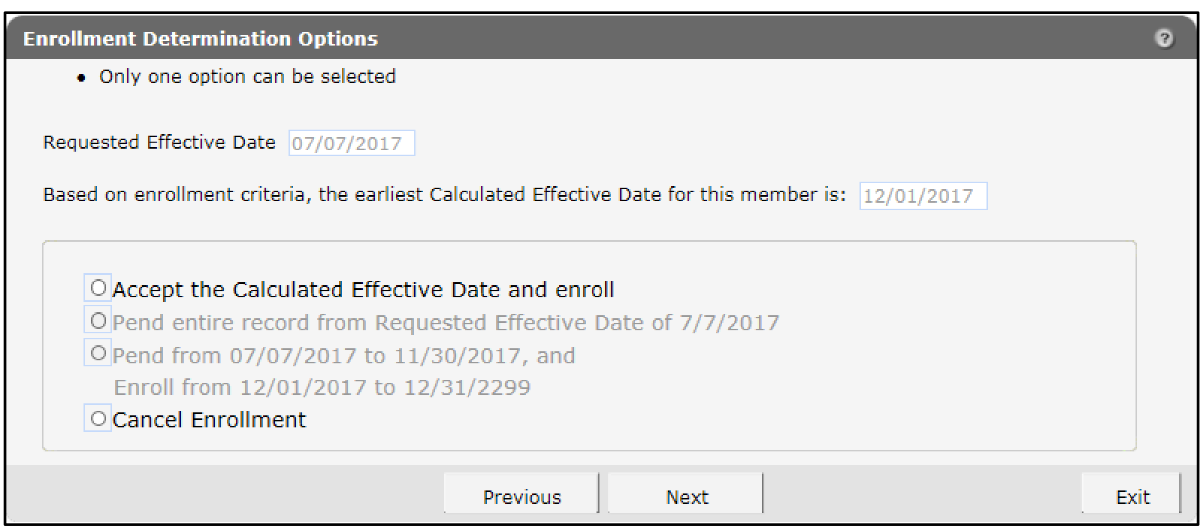


Figure 23 Enrollment Determination Options Panel

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.

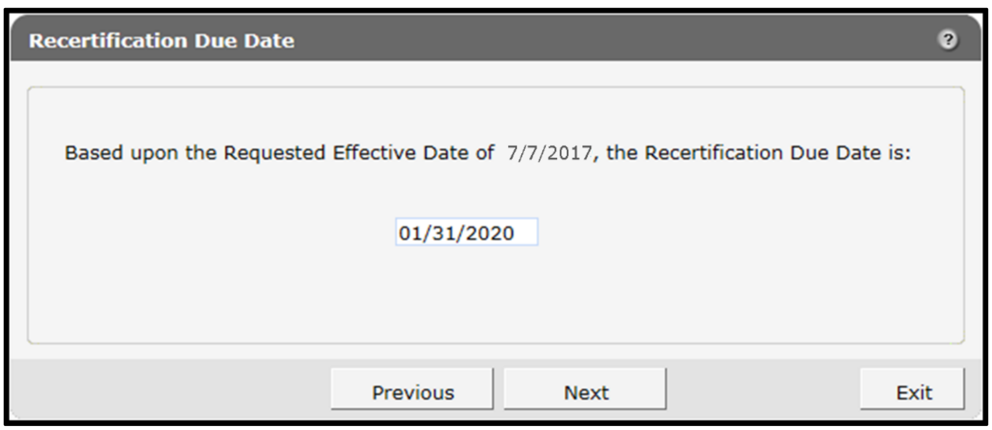


Figure 24 Recertification Due Date Panel

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.

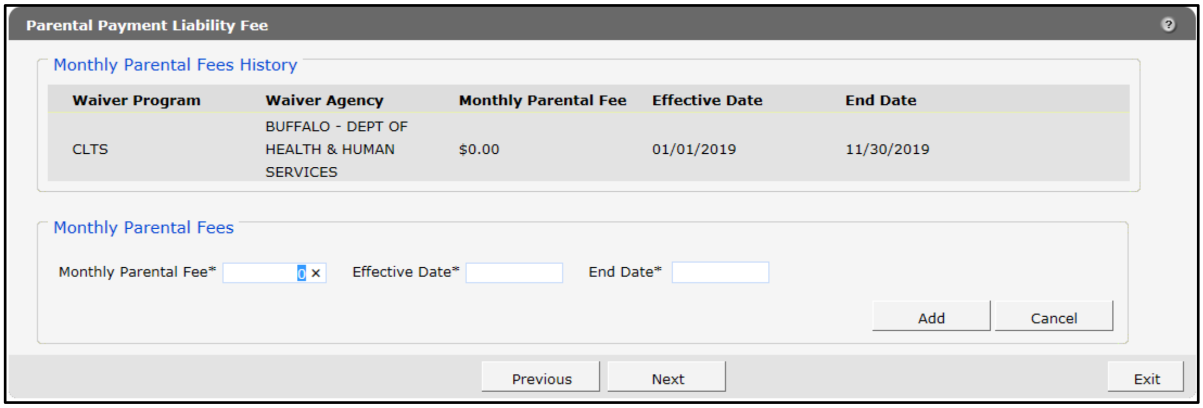


Figure 25 Parental Payment Liability Fee Panel

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:

    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.

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

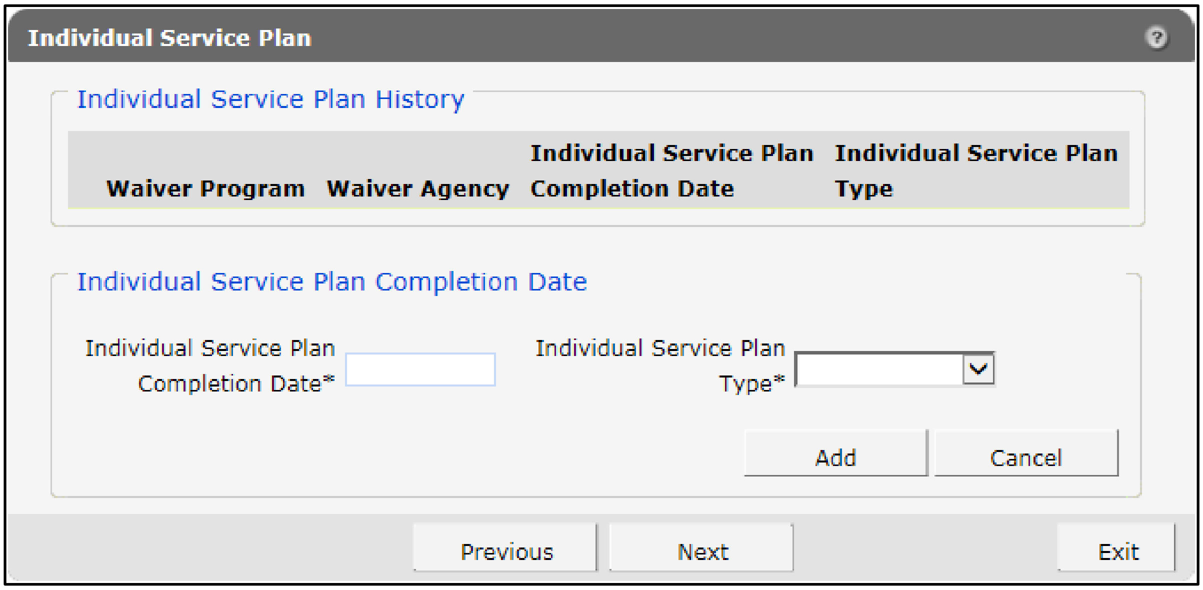


Figure 26 Individual Service Plan Panel

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.

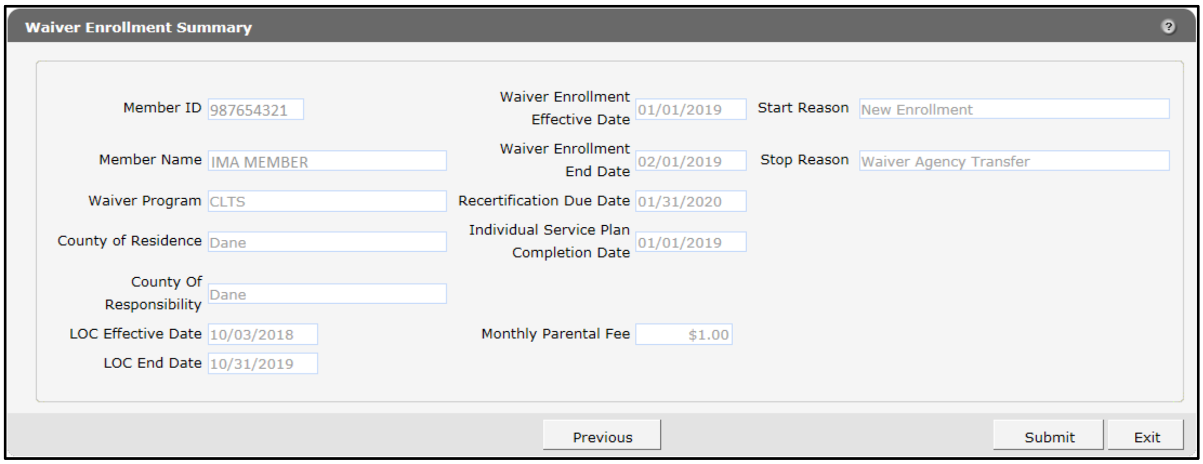


Figure 27 Waiver Enrollment Summary Panel

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.

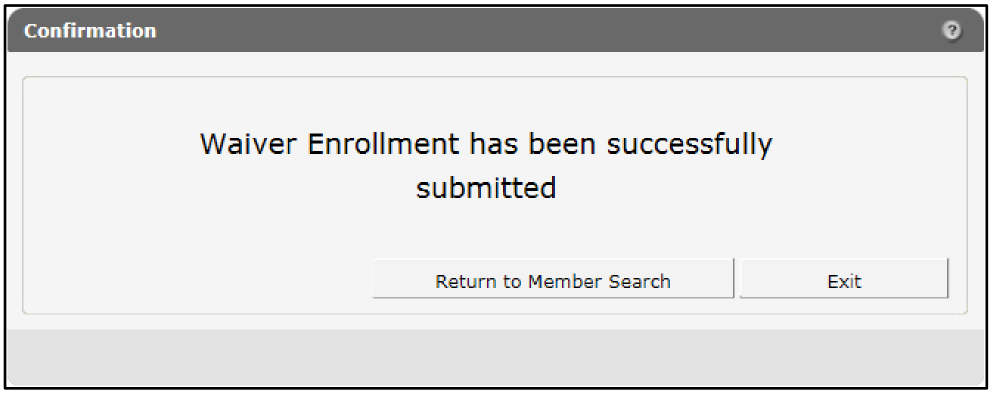


Figure 28 Confirmation Panel

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**.

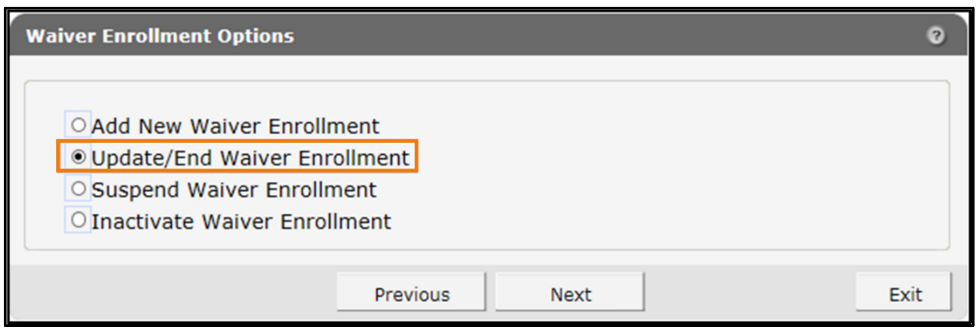


Figure 29 Waiver Enrollment Options Panel

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

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

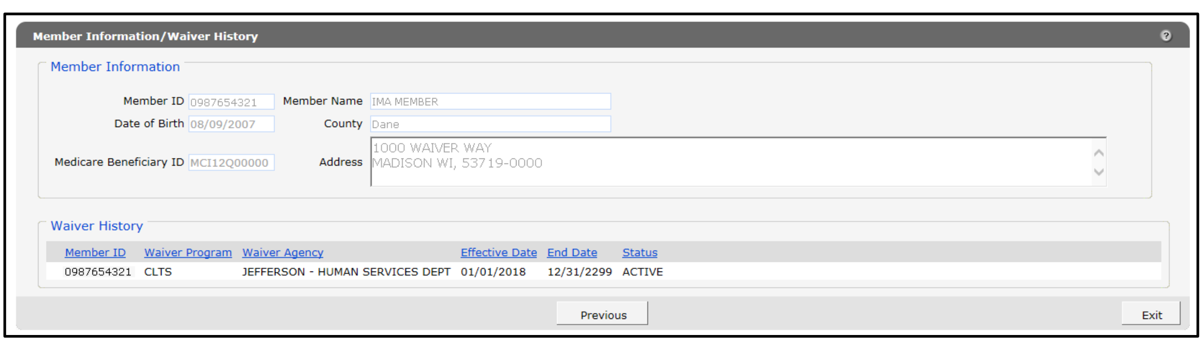


Figure 30 Member Information/Waiver History Panel

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.

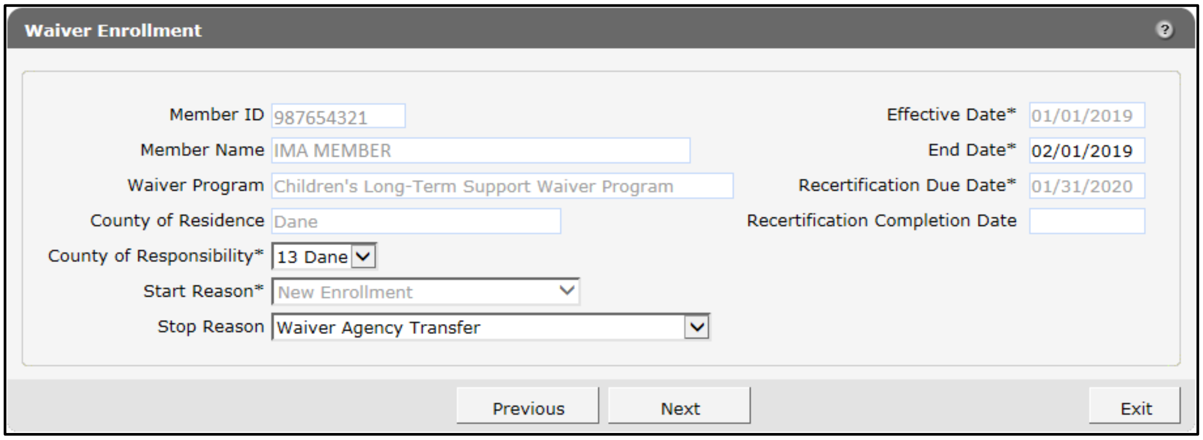


Figure 31 Waiver Enrollment Panel

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.

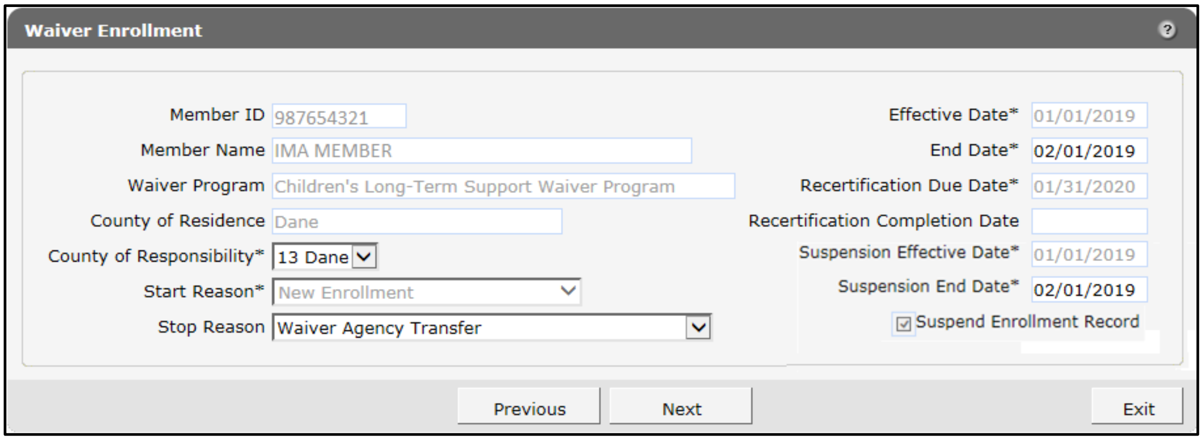


Figure 32 Waiver Enrollment Panel for Suspended Record

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

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

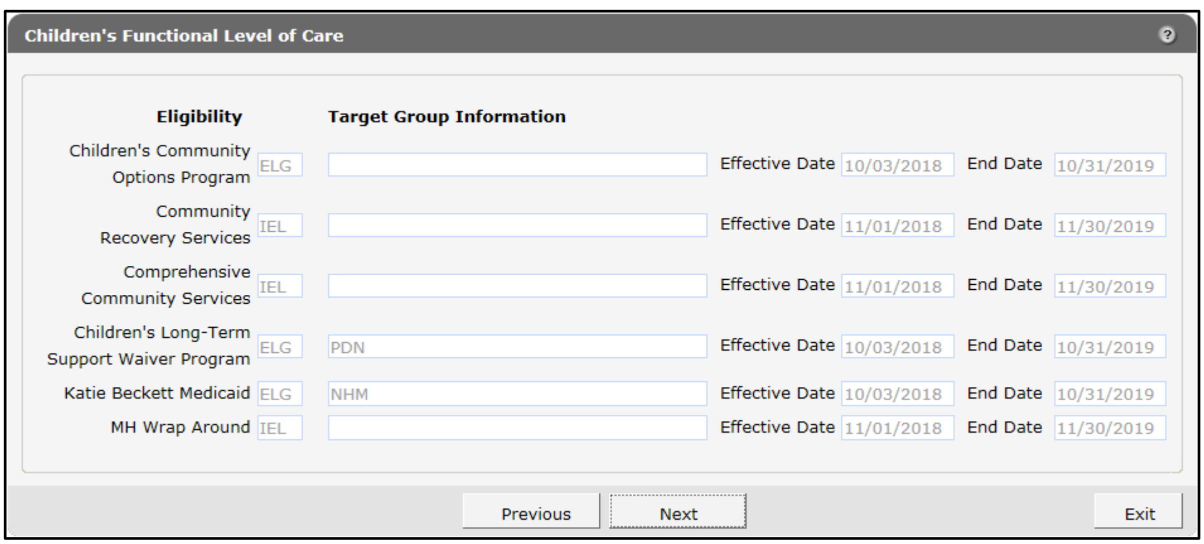


Figure 33 Children's Functional Level of Care Panel

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

- Fields in the *Eligibility* column display a code that indicates whether the member is functionally eligible for the designated program. Codes include:
    - *ELG*—The member is eligible for the program.

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

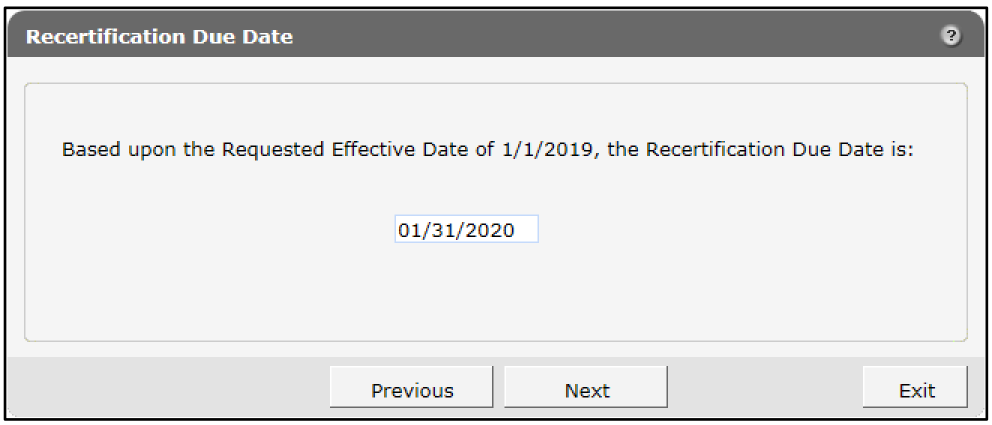


Figure 34 Recertification Due Date Panel

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.

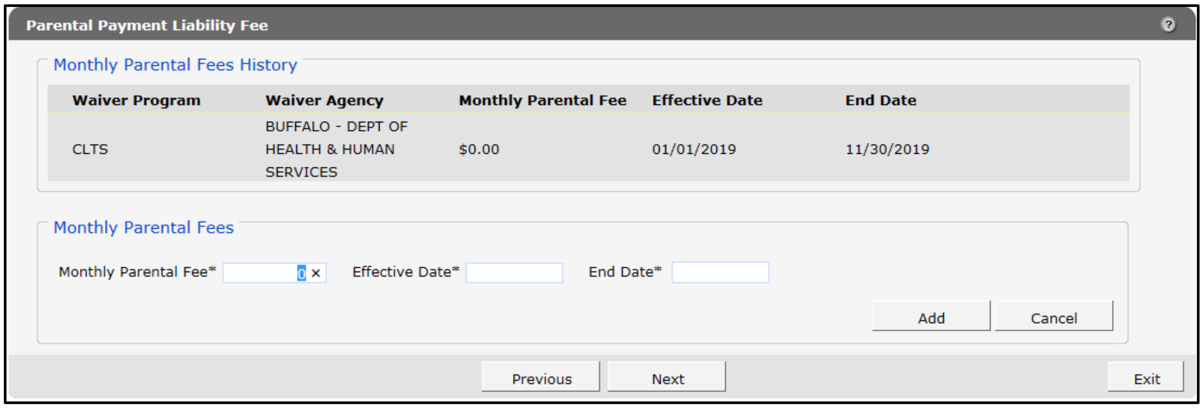


Figure 35 Parental Payment Liability Fee Panel

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.

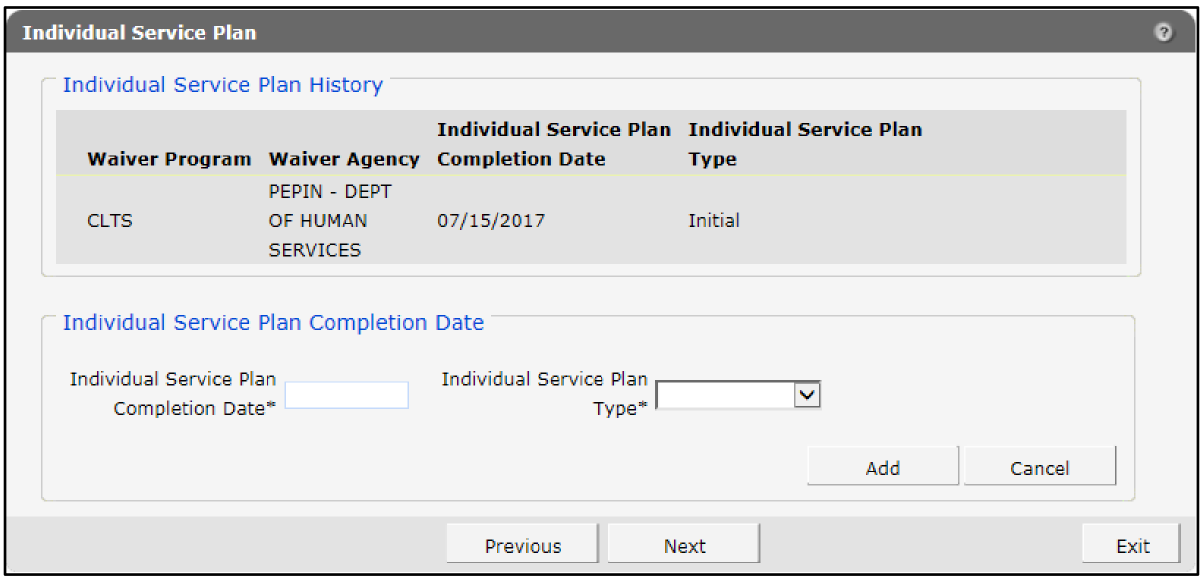


Figure 36 Individual Service Plan Panel

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:

    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 later be updated once an ISP has been completed.

12. To modify an existing ISP record, perform the following steps:

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

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

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

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

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

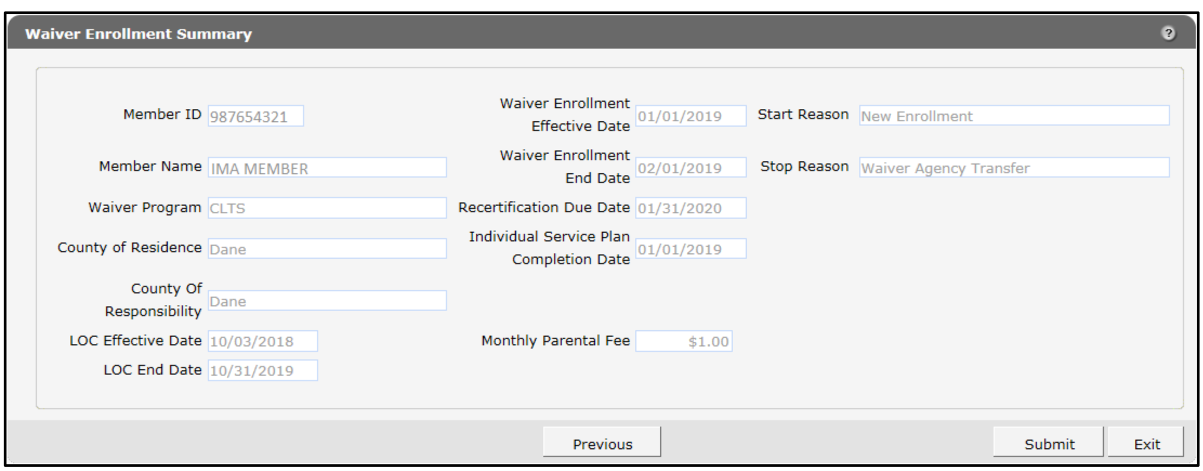


Figure 37 Waiver Enrollment Summary Panel

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.

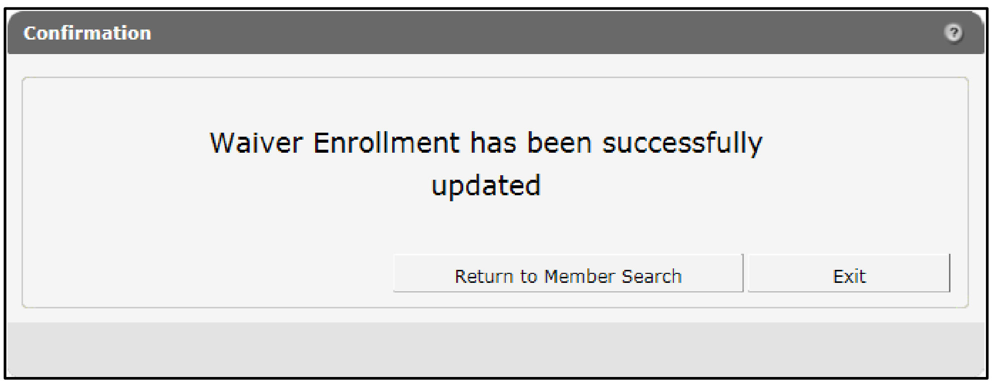


Figure 38 Confirmation Panel

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

16. 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**.

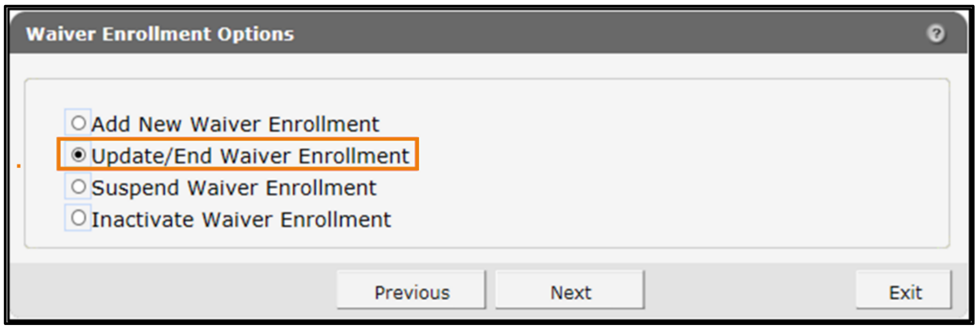


Figure 39 Waiver Enrollment Options Panel

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.

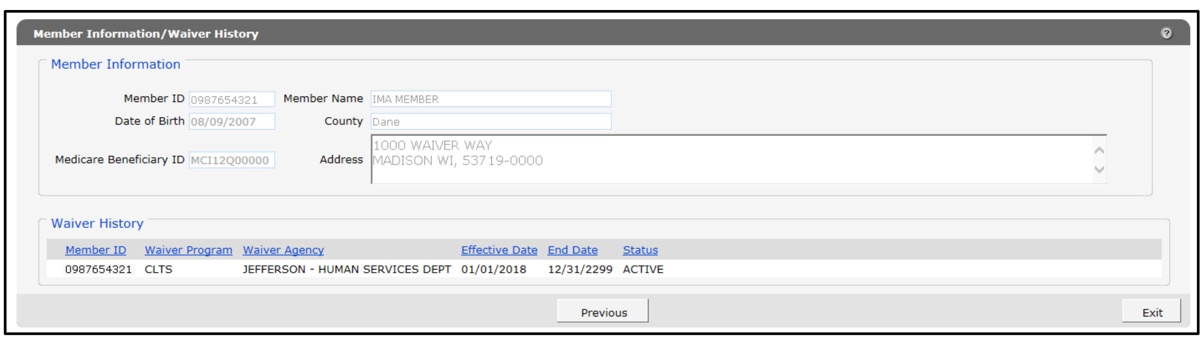


Figure 40 Member Information/Waiver History Panel

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.

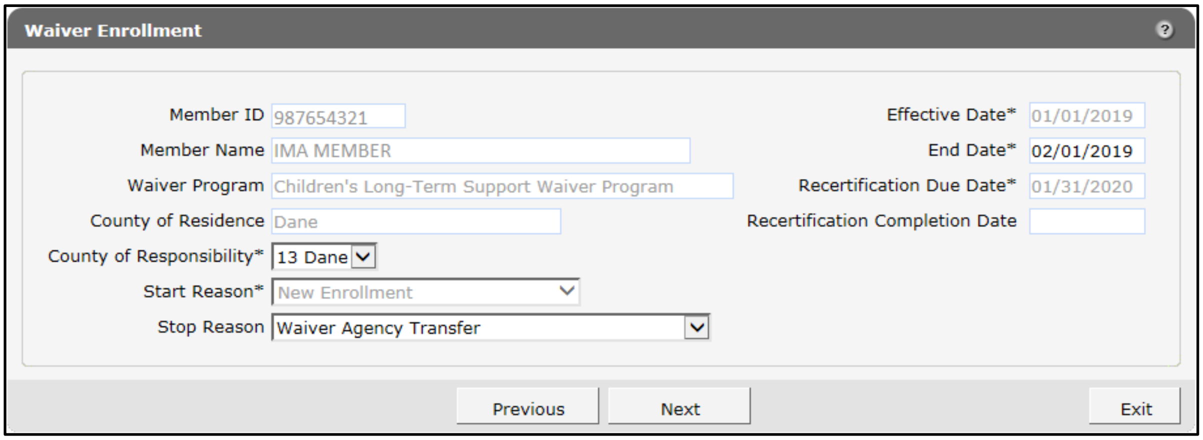


Figure 41 Waiver Enrollment Panel

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.

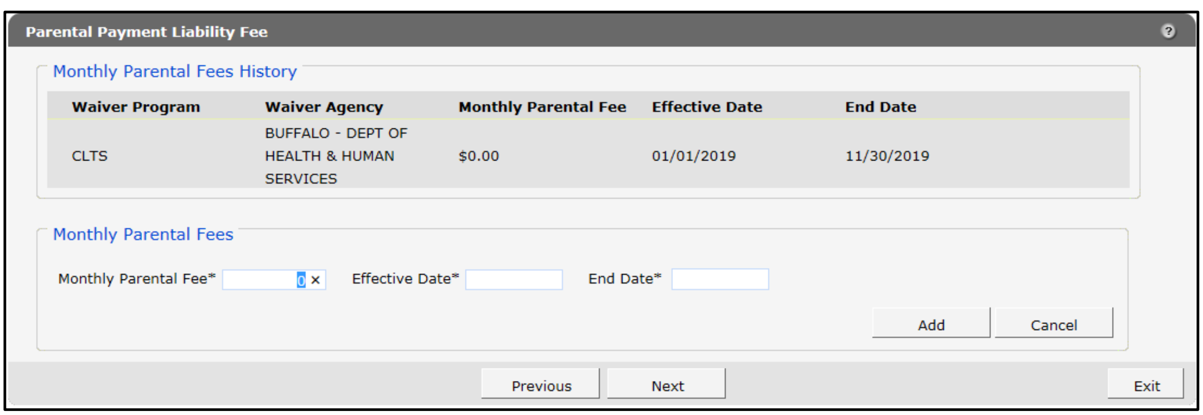


Figure 42 Parental Payment Liability Fee Panel

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.

7. 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.

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

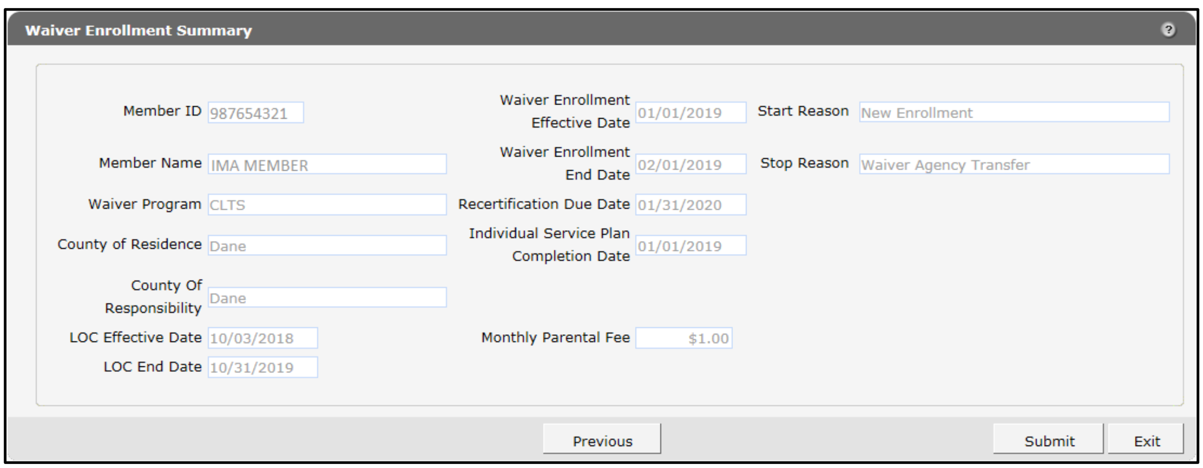


Figure 43 Waiver Enrollment Summary Panel

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.

9. 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.

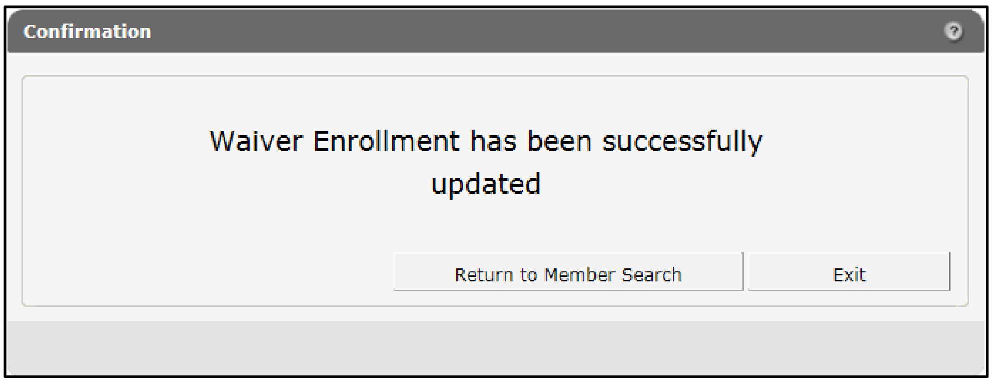


Figure 44 Confirmation Panel

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**.

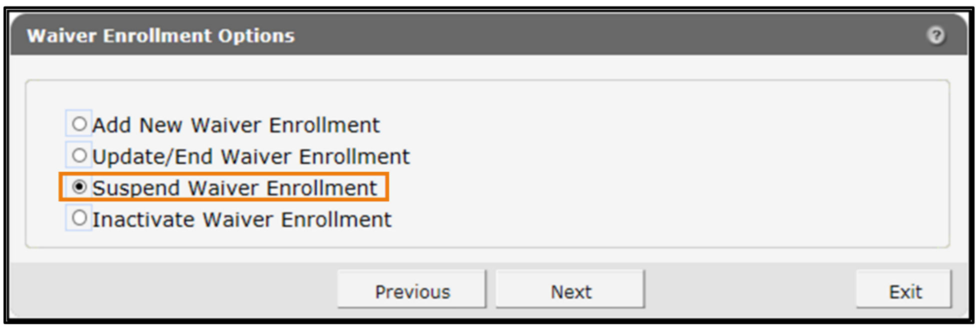


Figure 45 Waiver Enrollment Options Panel

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.

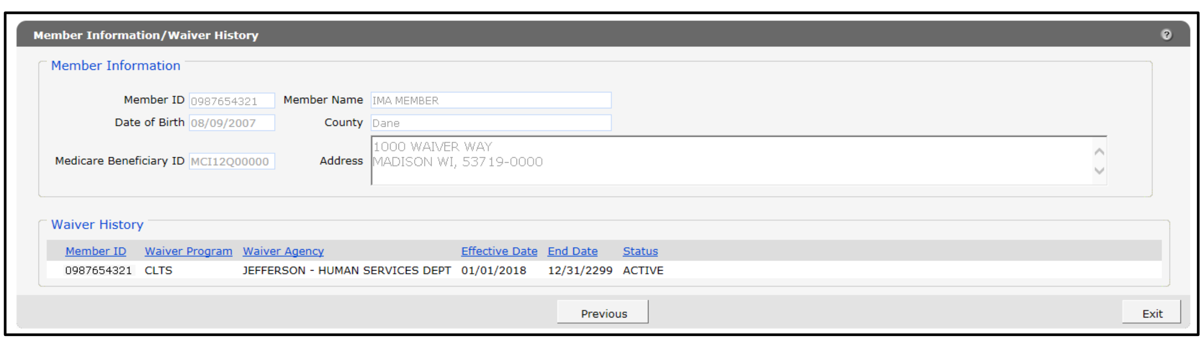


Figure 46 Member Information/Waiver History Panel

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

3. Select the waiver enrollment record to be suspended. The Waiver Enrollment panel will be displayed with a stop reason that defaults to "Suspended."

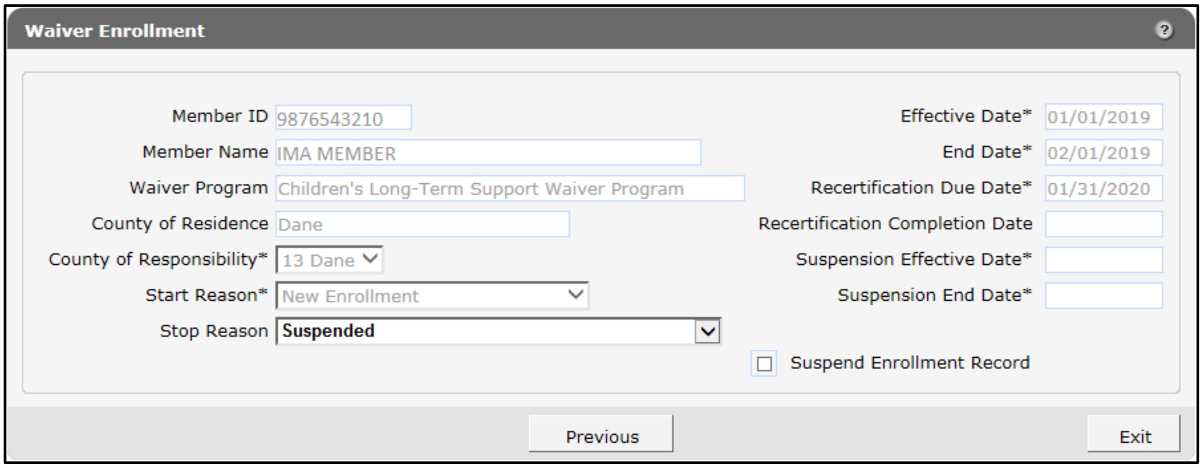


Figure 47 Waiver Enrollment Panel

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.

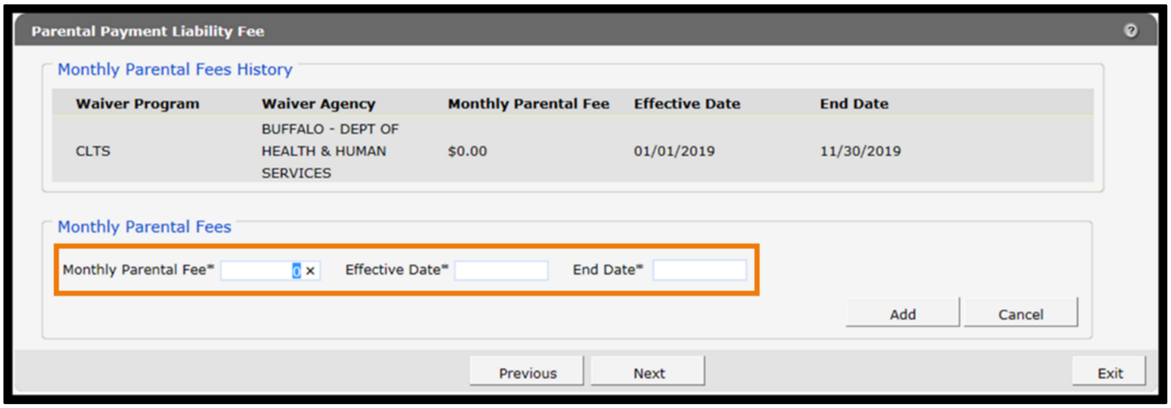


Figure 48 Parental Payment Liability Fee Panel

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.

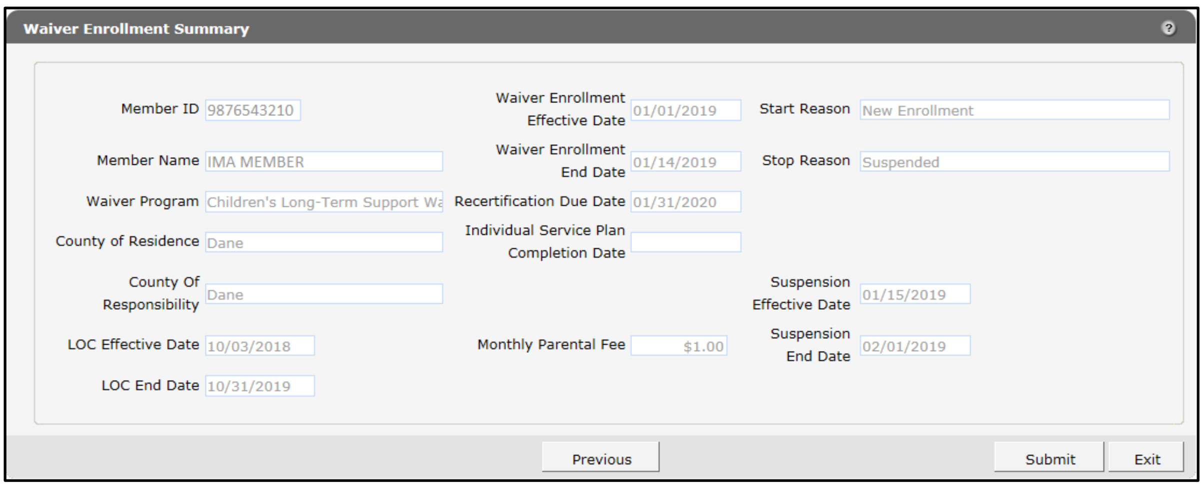


Figure 49 Waiver Enrollment Summary Panel

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.

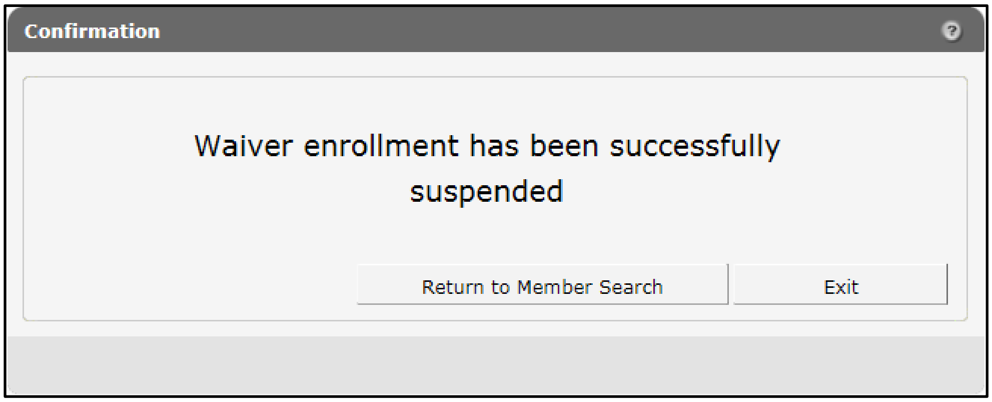


Figure 50 Confirmation Panel

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**.

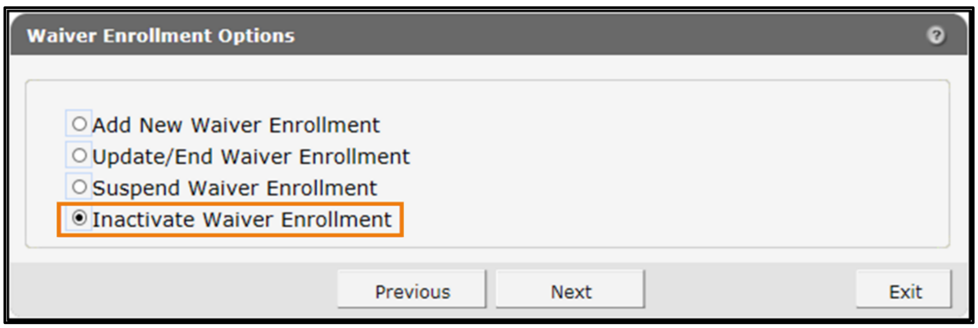


Figure 51 Waiver Enrollment Options Panel

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.

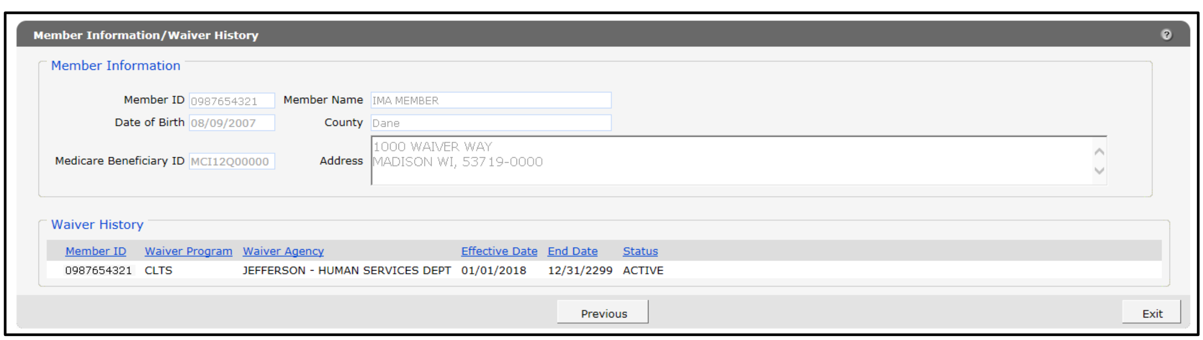


Figure 52 Member Information/Waiver History Panel

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.

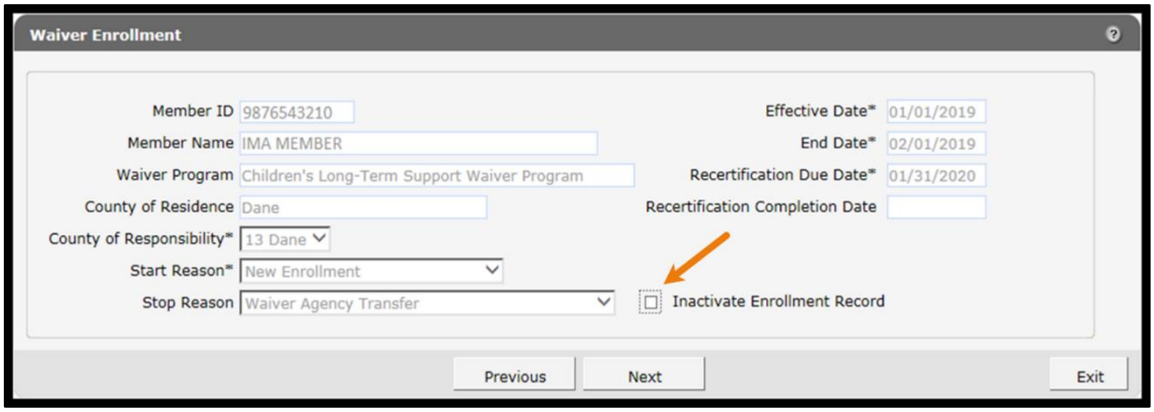


Figure 53 Waiver Enrollment Panel

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.

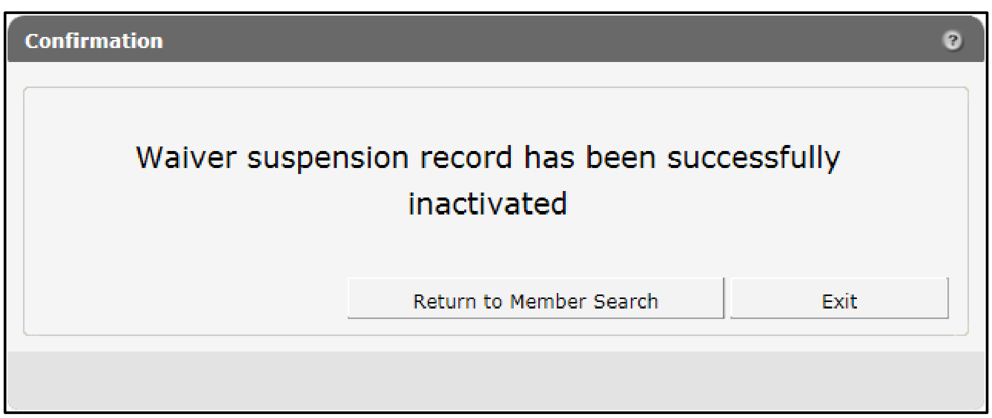


Figure 54 Confirmation Panel

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.

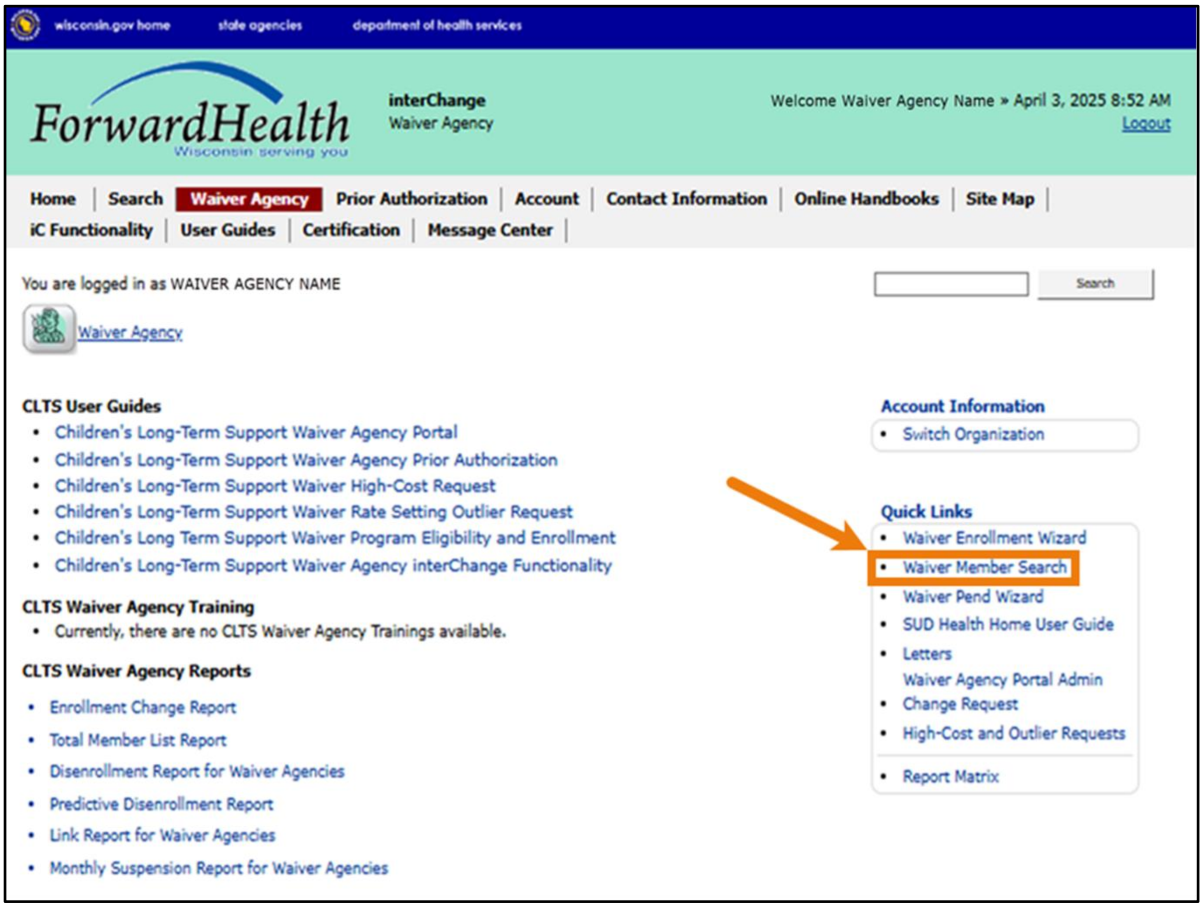


Figure 55 Secure Waiver Agency Page

2. The Member Search panel will be displayed.

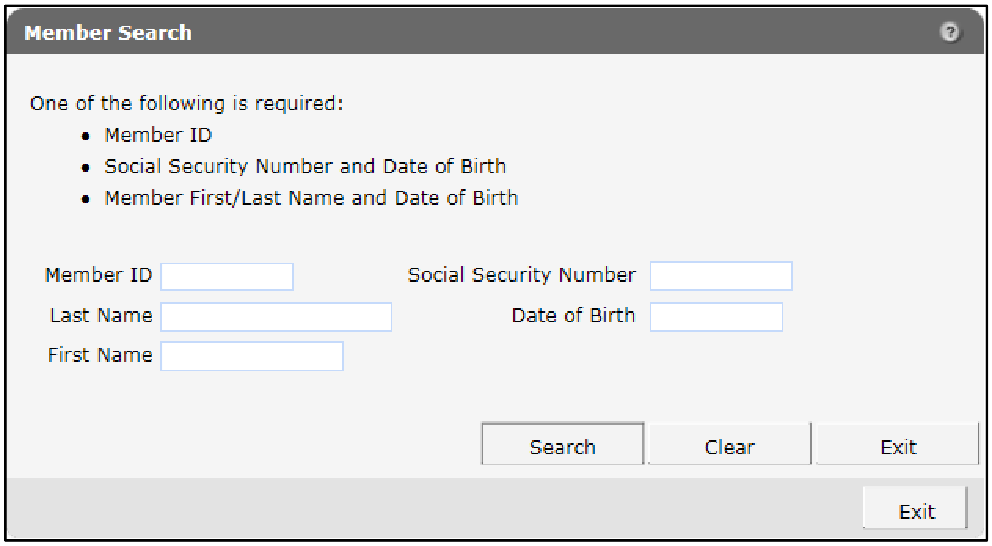


Figure 56 Member Search Panel

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.

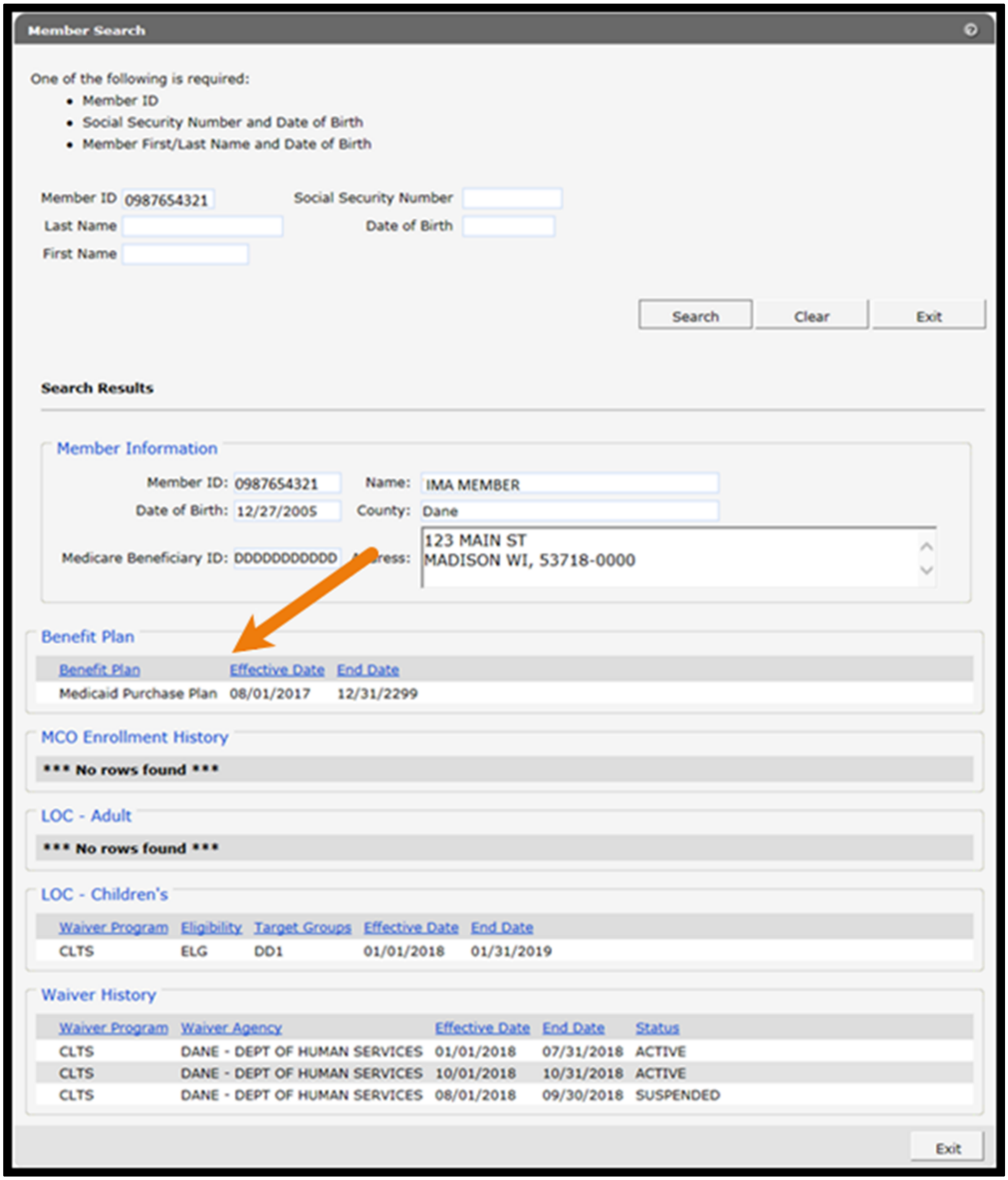


Figure 57 Member Search Panel With "Search Results" Section

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 appropriate security will access available reports from either the Secure Waiver Agency Portal or via SAS.

12.1 OnBase Reports

Users who are assigned the appropriate security roles by their agency administrator can access OnBase 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.

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

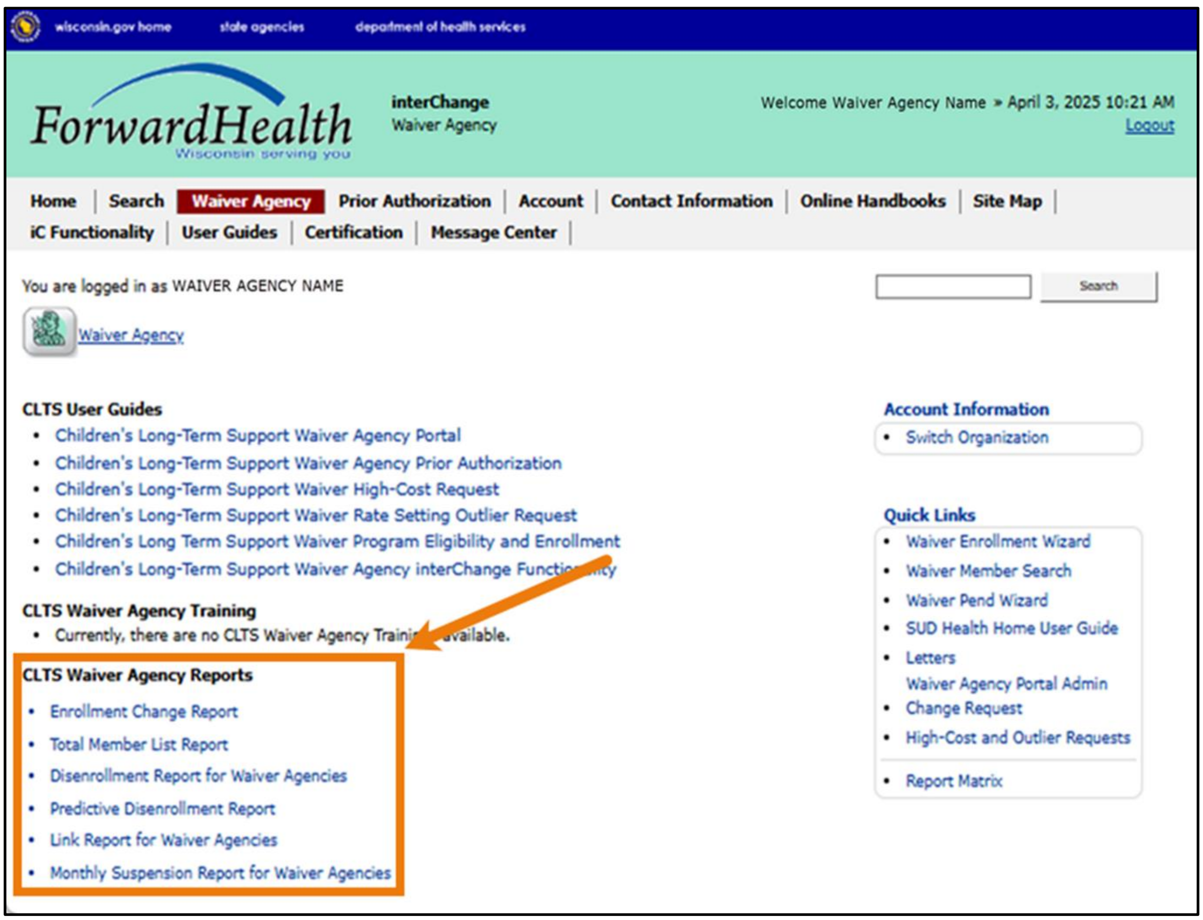


Figure 58 Secure Waiver Agency Page

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.

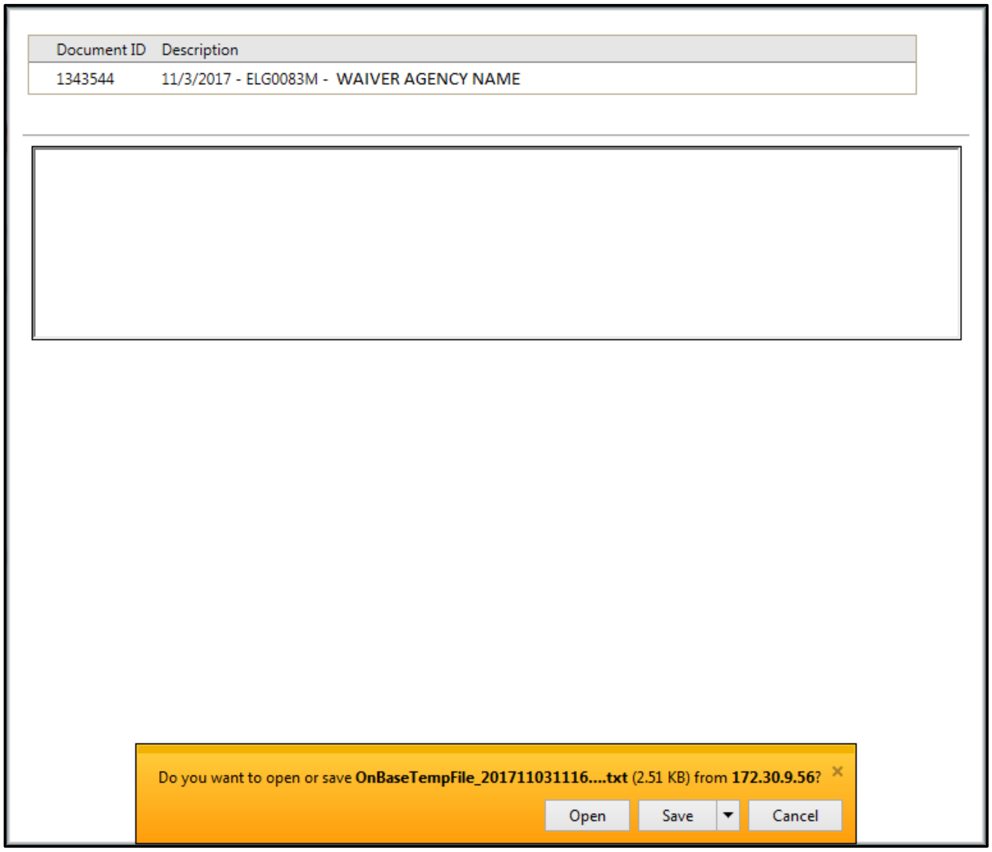


Figure 59 File Download Window

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 SAS Reports

SAS is the software framework, servers, and applications used for the Enterprise Data Warehouse/Data Analytics and Reporting (EDW/DAR) module. The EDW/DAR module consists of a centralized Wisconsin Medicaid/Long-Term Care enterprise data warehouse. Additionally, EDW/DAR consists of applications to query, report, and analyze the data. More information on CLTS reports in the SAS EDW/DAR is available at https://www.dhs.wisconsin.gov/clts/waiver/county/sas.htm.

For any issues with EDW/DAR, users can contact the DHS SAS Cloud Help Desk at wids-helpdesk@sas.com.

For training on accessing and running CLTS reports, users can email SAS Training at EDWDARtraining@sas.com.

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. Once submitted and approved, the user will be granted access and sent a welcome email. This access allows users to create and view reports with data from that data collection or universe.

13.2 Accessing DSS Universe Management

1. From the secure Waiver Agency page, click the **Account tab.**

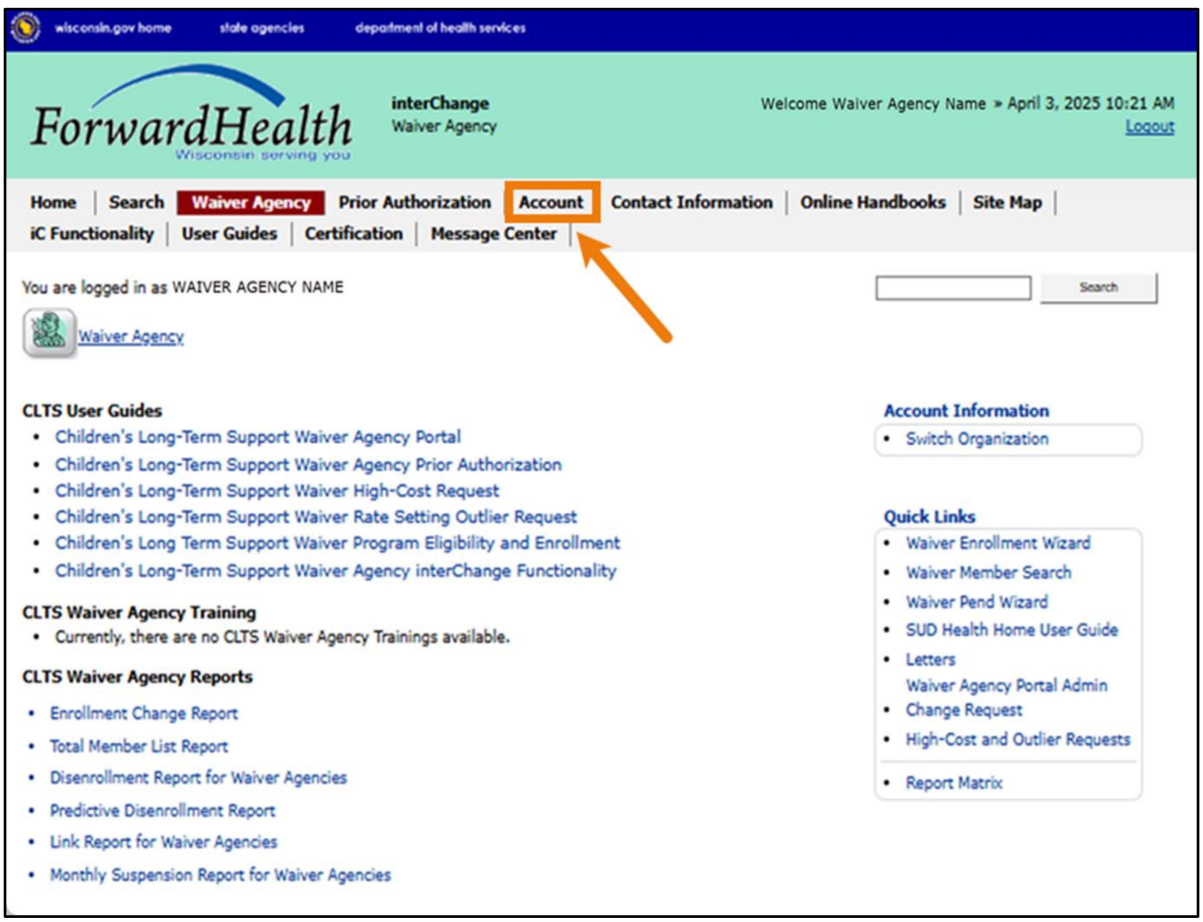


Figure 60 Secure Waiver Agency Page

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 61 Account Screen

The Clerk Selection panel will be displayed.

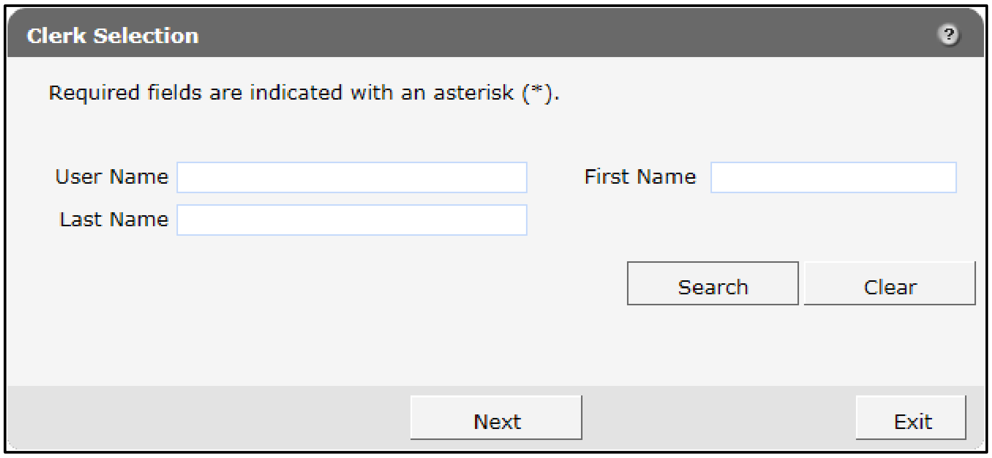


Figure 62 Clerk Selection Panel

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.

4. Click the Search button. Search results will be populated below in the "Search Results" section.

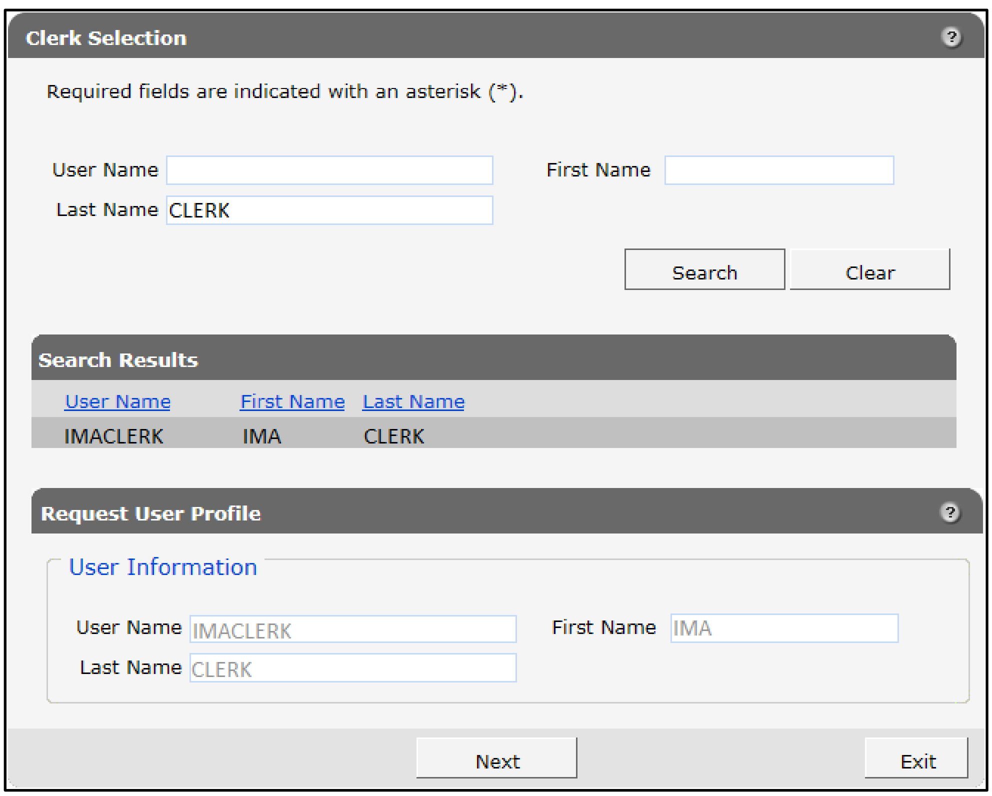


Figure 63 Clerk Selection Panel With Search Results

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.

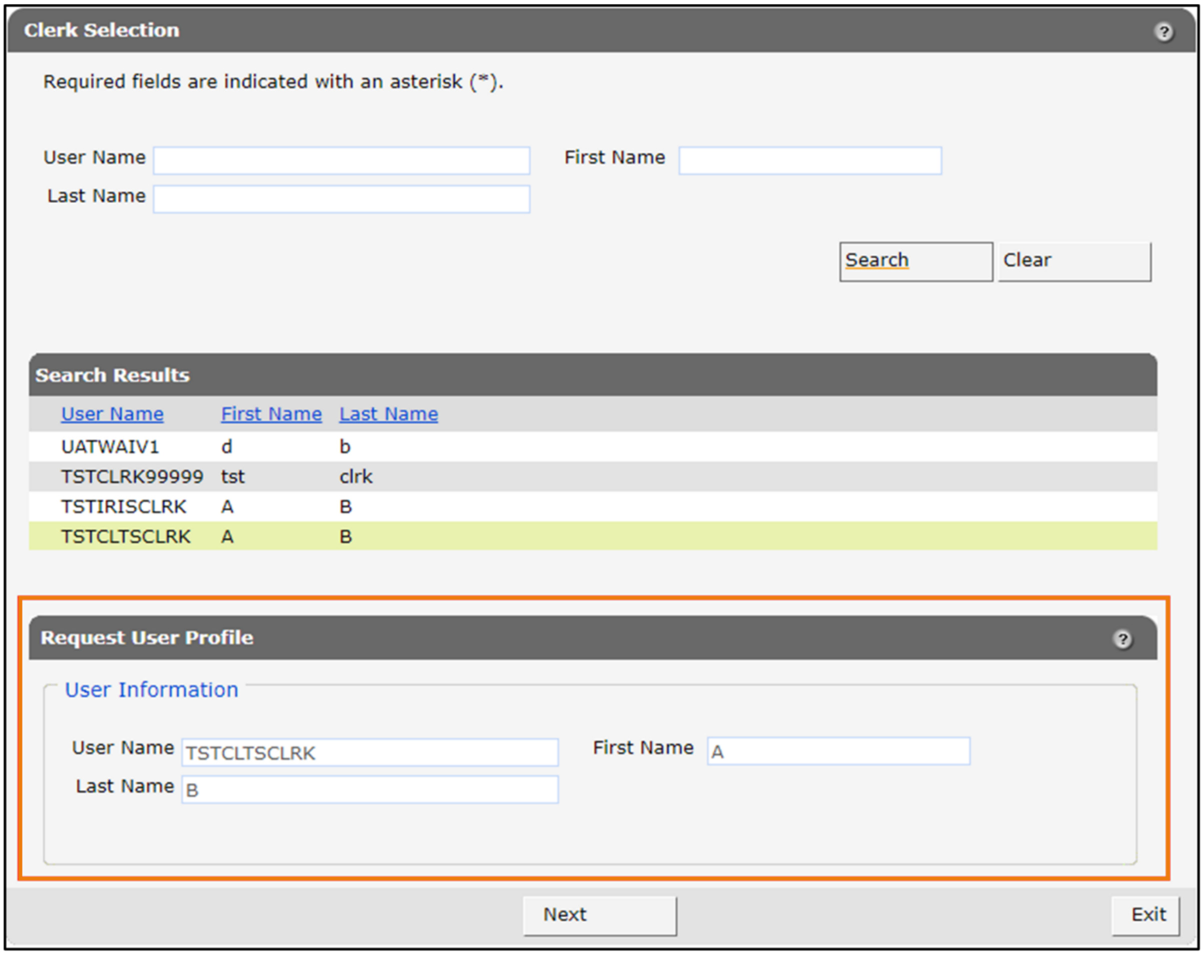


Figure 64 Clerk Selection Panel

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

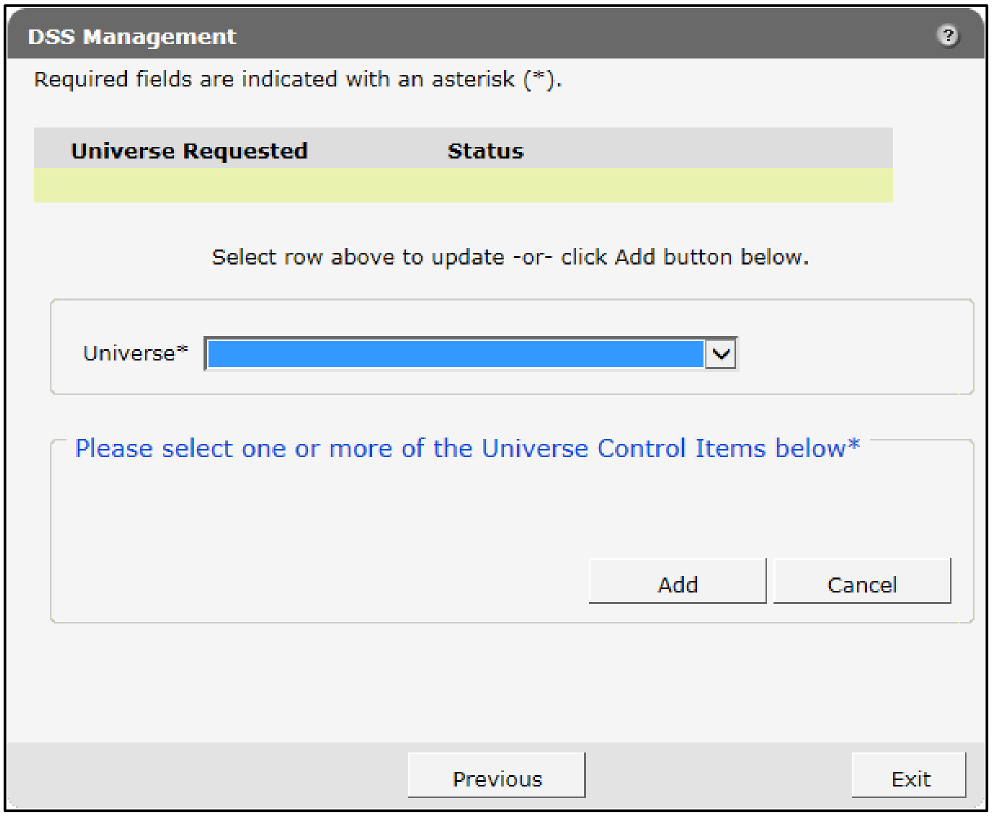


Figure 65 DSS Management Panel

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

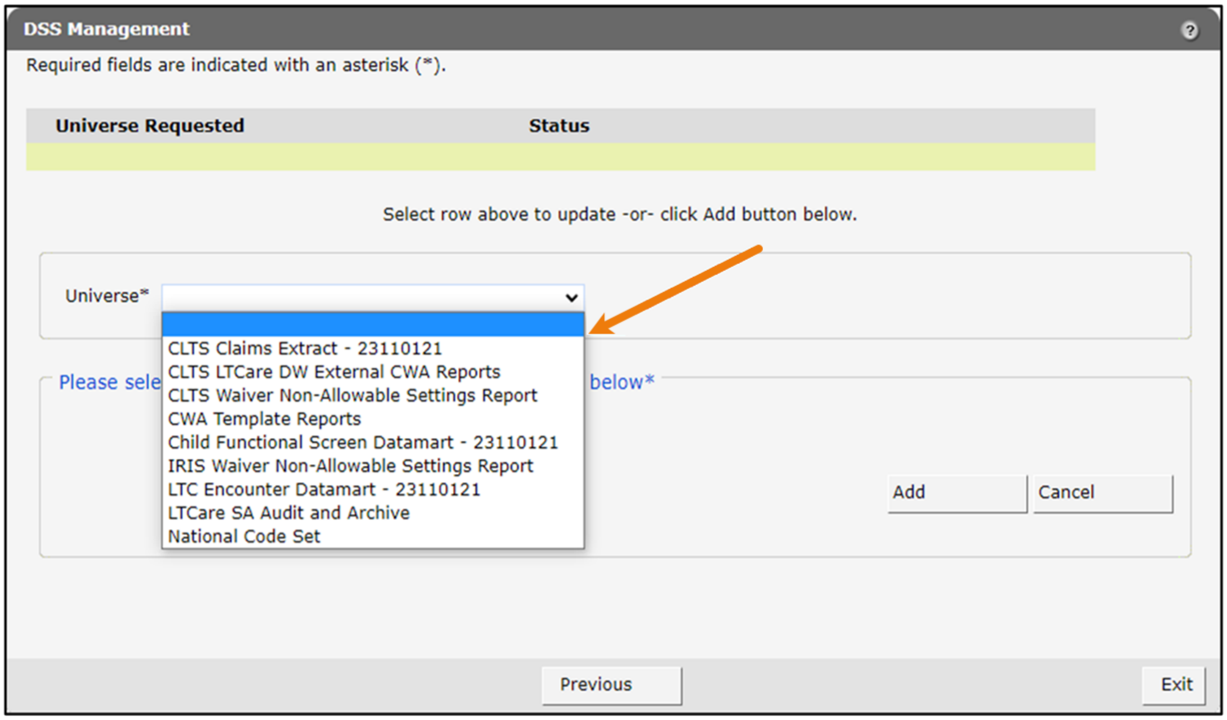


Figure 66 DSS Management Panel

4. The page will refresh, and the user’s selection will be shown in the “Please select one or more of the Universe Control Items below*” section.

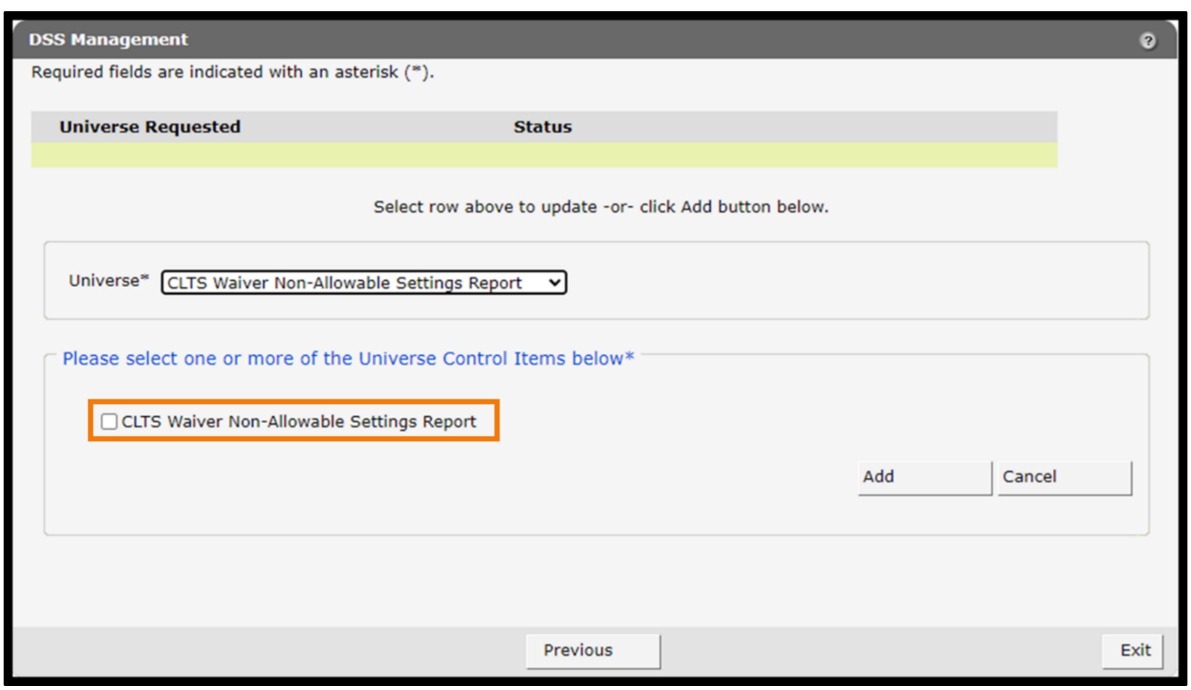


Figure 67 DSS Management Panel With Universe Selected

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

5. 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.

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

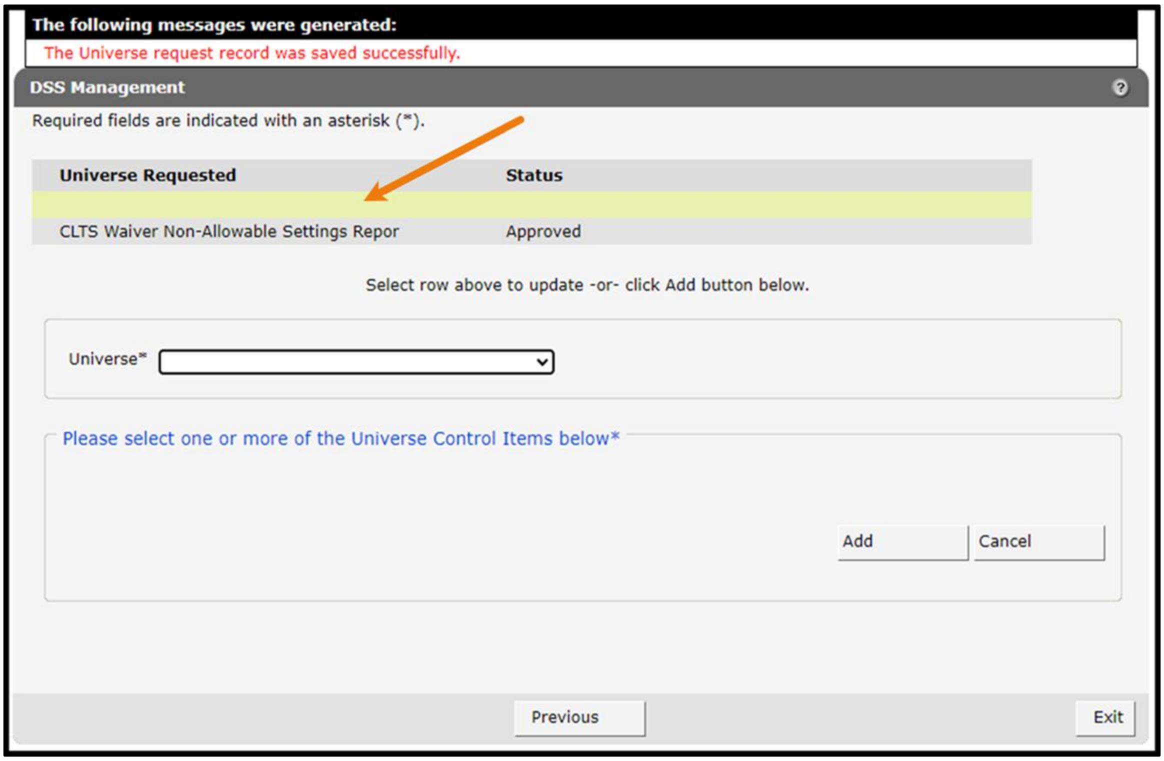


Figure 68 DSS Management Panel

Once a request is added, SAS will grant the request in one business day and the user will be able to use the selected 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.

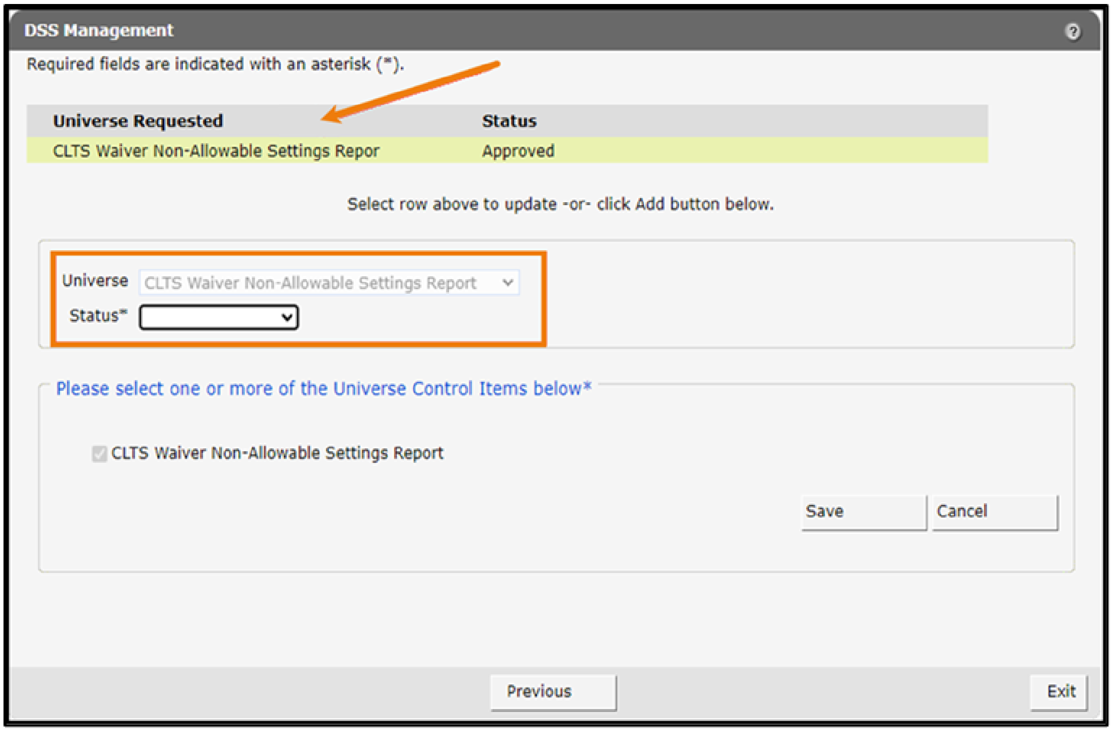


Figure 69 DSS Management Panel

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

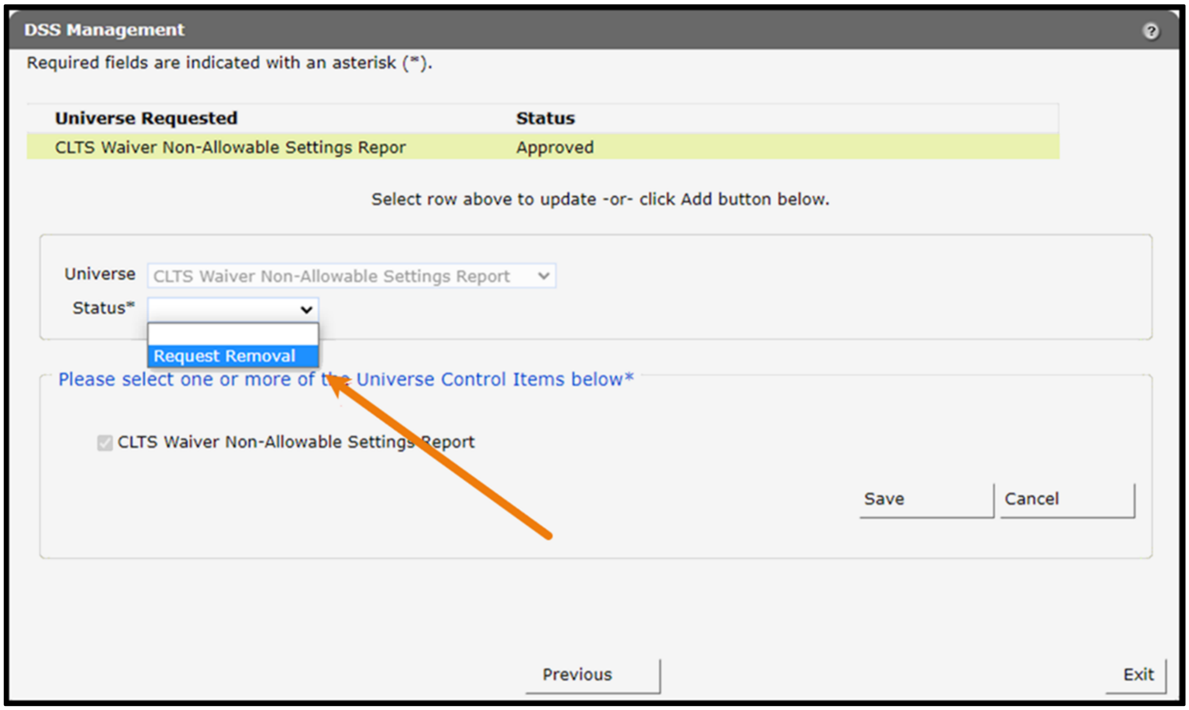


Figure 70 DSS Management Panel Request Removal

3. Click **Save**. The page will be refreshed, and the universe status will be listed in the "Universe Requested" section with a confirmation message.

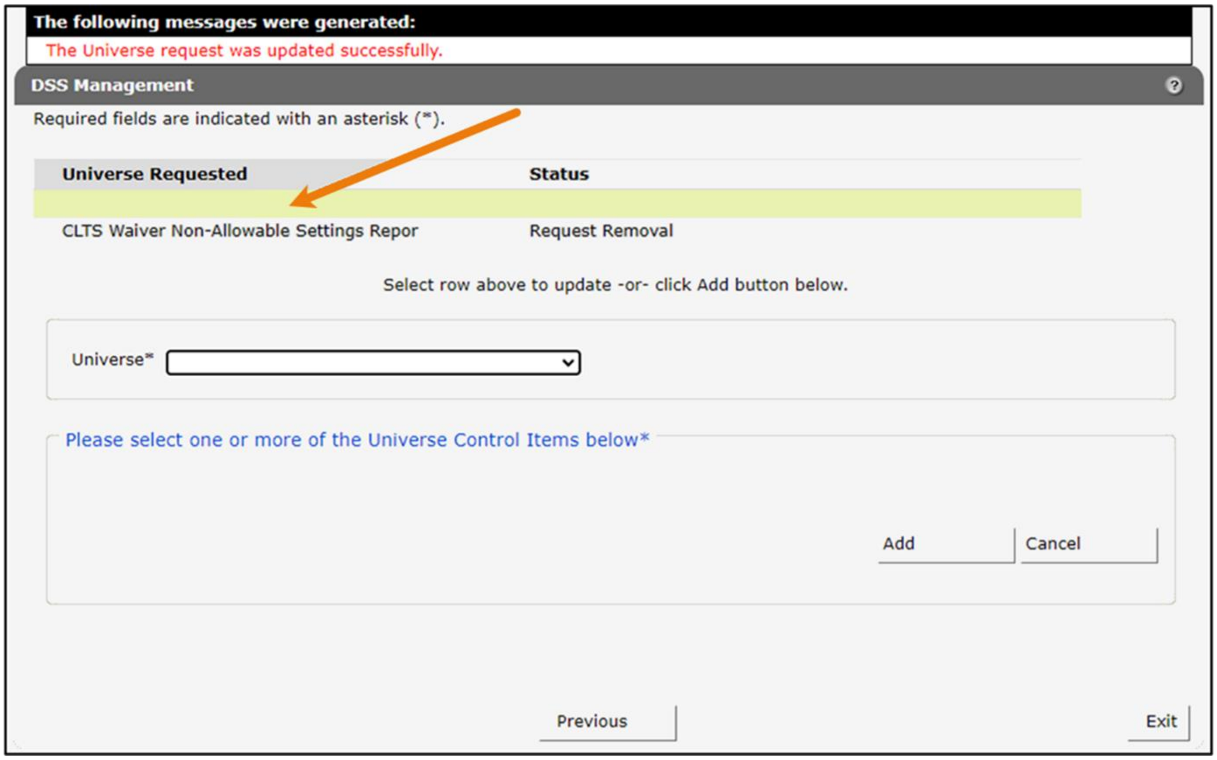


Figure 71 DSS Management Panel

14 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 and Notifications for a list of which start and stop reasons generate letters automatically.

14.1 Waiver Letters

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

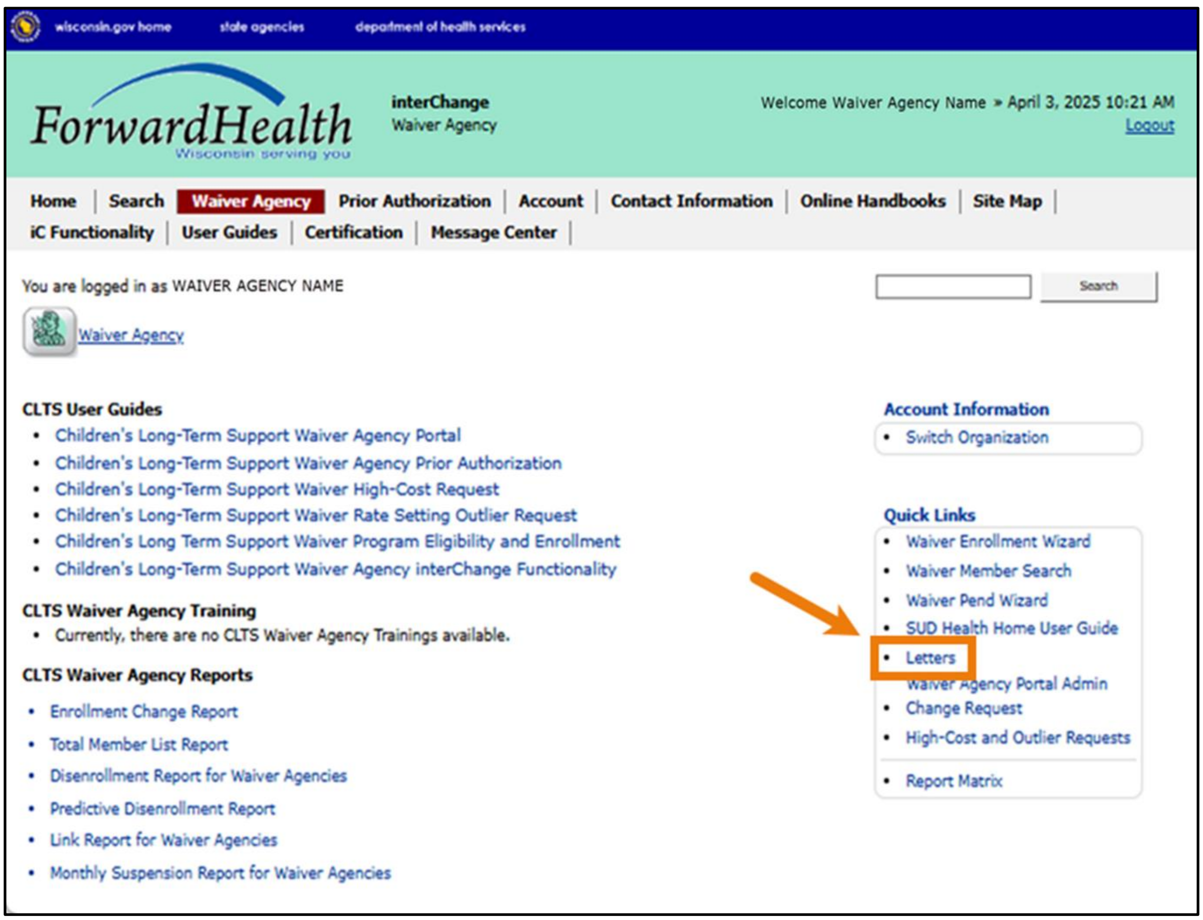


Figure 72 Secure Waiver Agency Page

The Waiver Letter page will be displayed.

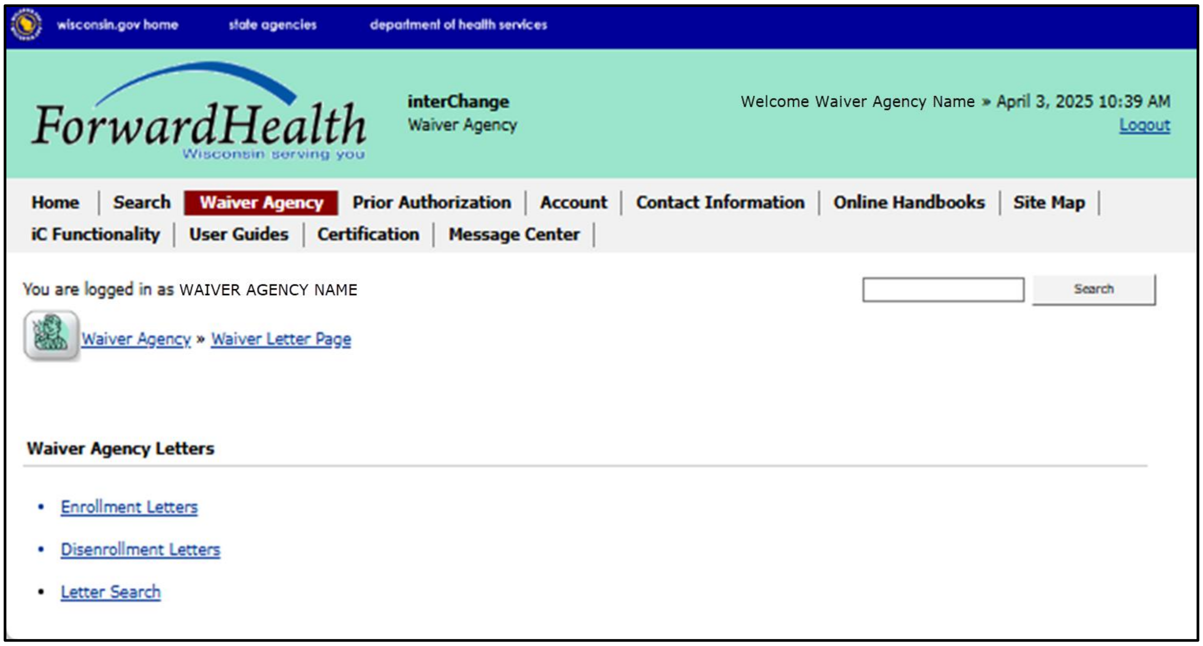


Figure 73 Waiver Letter Page

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.

15 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.

16 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.

PA Clerk CLTS Waiver: This role allows the user to utilize the Prior Authorization tab and all subsequent prior authorization links. This role is abbreviated as **PA Clerk CLTS Waiver** on the Portal.

PA—View Only: This role allows the user access to the Prior Authorization tab and the Search or Amend a PA, View Uploaded PA File Results, and PA Search-Bulk links. This role is abbreviated as **PA—View Only** on the Portal. Note: The Amend PA button will be disabled after the user performs a search.

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 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.

17 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.
2X	Failure to Meet Participant Responsibilities	MGD-9720	CLTS Disenrollment Notice	End reason is manually entered. Notice is sent to the member with the next weekly letter generation batch.
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-9721-R	CLTS Voluntary Disenrollment Notice	End reason is manually entered. Notice is sent to the member with the next weekly letter generation batch.