



## **Instructions for County Waiver Agency (CWA) Fiscal Staff to Access the Children's Long-Term Support (CLTS) Data Warehouse External CWA Templates Folder via the ForwardHealth Partners Portal**

DHS has designed a CLTS Reconciliation Template to help accurately and efficiently retrieve CLTS Claims Extract data for the CLTS reconciliation process.

The CLTS Reconciliation Template is a Business Objects report counties may access via the Business Objects Web Intelligence application. Instructions to acquire access to the CLTS Claims Extract data warehouse are available in the Partners Portal via ForwardHealth: <https://www.forwardhealth.wi.gov/>.

The CLTS Reconciliation Template will extract and format CWA CLTS Claims Extract information to align with Appendix B in the [CLTS Reconciliation Packet, F-00963](#). The template's query prompts are prepopulated with the final CLTS reconciliation service and check dates. DHS strongly recommends that CWA fiscal staff access and run the CLTS Reconciliation Template prior to the CLTS third party administrator (TPA) cutoff date (see [Fiscal Reconciliation Documents and Milestones, P-02089](#)) to ensure they can retrieve claims data via the template. The final reconciliation data set will be available in the CLTS Claims Extract universe approximately one week after the CLTS TPA cutoff date. CWAs will need to refresh the template after the final reconciliation data set becomes available in the CLTS Claims Extract to ensure it will contain the final reconciliation data set summary totals.

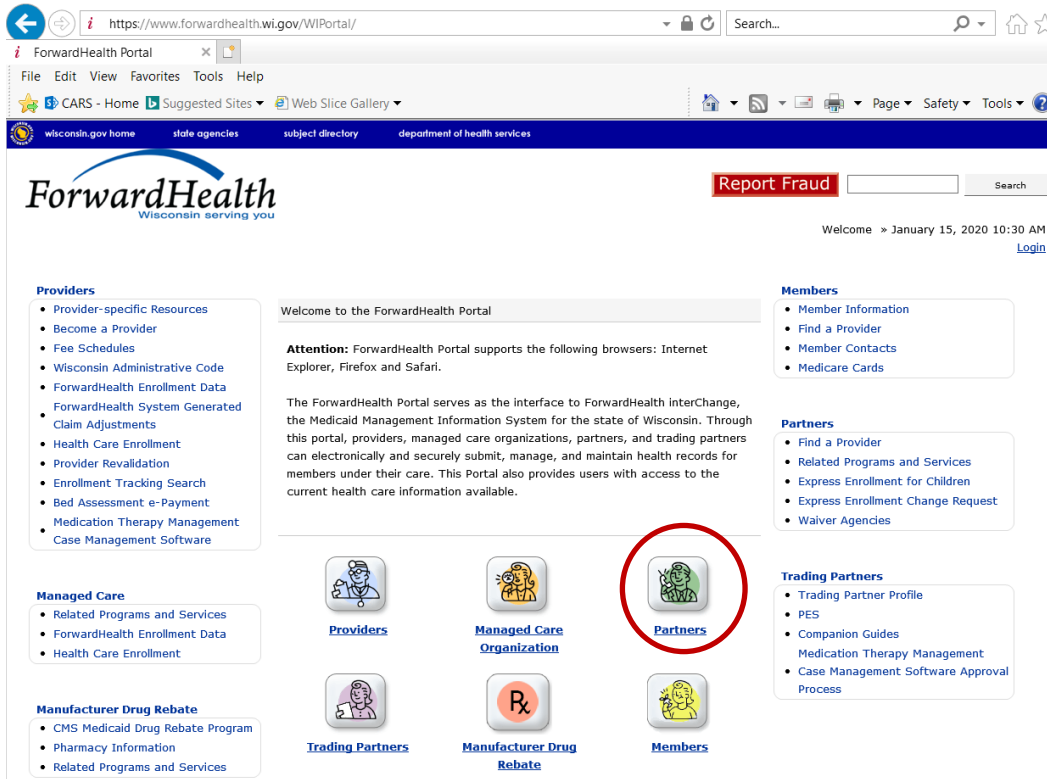
### **How to access the CLTS DW External CWA Templates folder**

Counties will need to use Business Objects Web Intelligence to access the CLTS Claims Extract universe and to utilize the CLTS Reconciliation template. The CLTS Reconciliation Template is saved in the CLTS DW External CWA Templates folder. CLTS fiscal staff should contact their local security administrators for instructions on Business Objects clearance and approval to access the CLTS Claims Extract Universe. Local security administrators will be contacted by DXC to validate new authorizations prior to granting access Business Objects and/or the CLTS Claims Extract data warehouse; without approval by a local security administrator, access to the CLTS Claims Extract data warehouse may be denied.

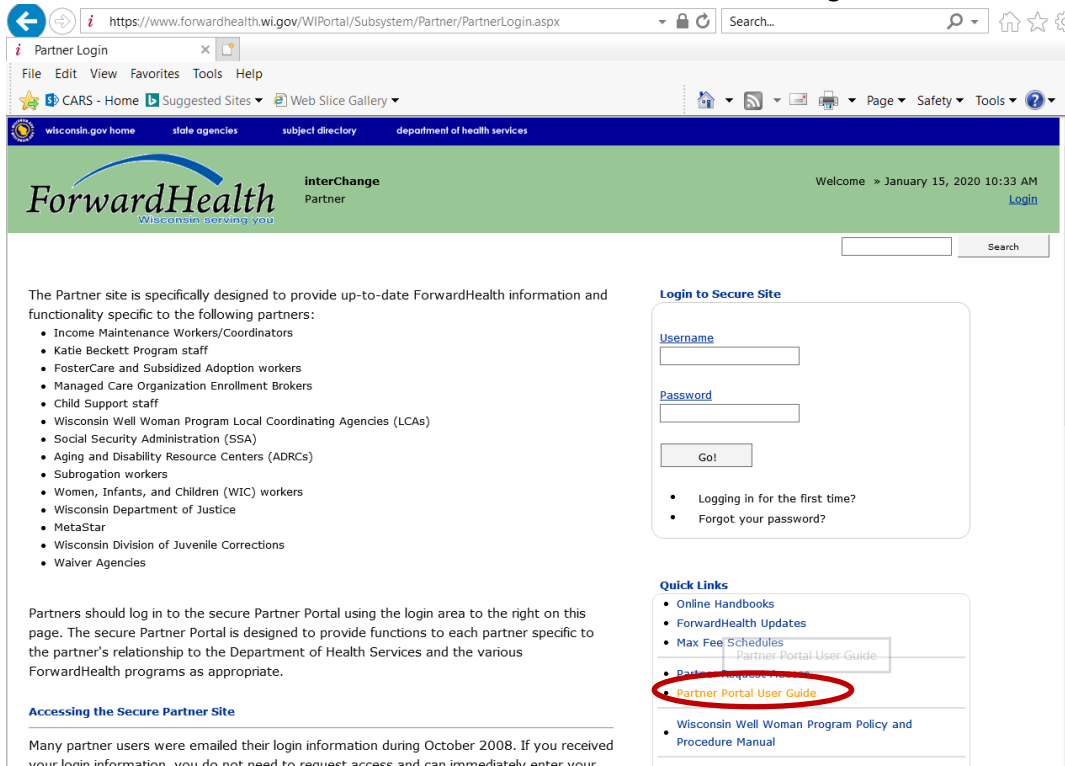
To acquire access to the CLTS DW External CWA Templates folder:

- 1) Go to the ForwardHealth Portal: <https://www.forwardhealth.wi.gov/WIPortal/Default.aspx>

2) Click on the [Partners](#) Tile.



3) Click on the [Partner Portal User Guide](#) under the Quick Links in the Right Side Column.



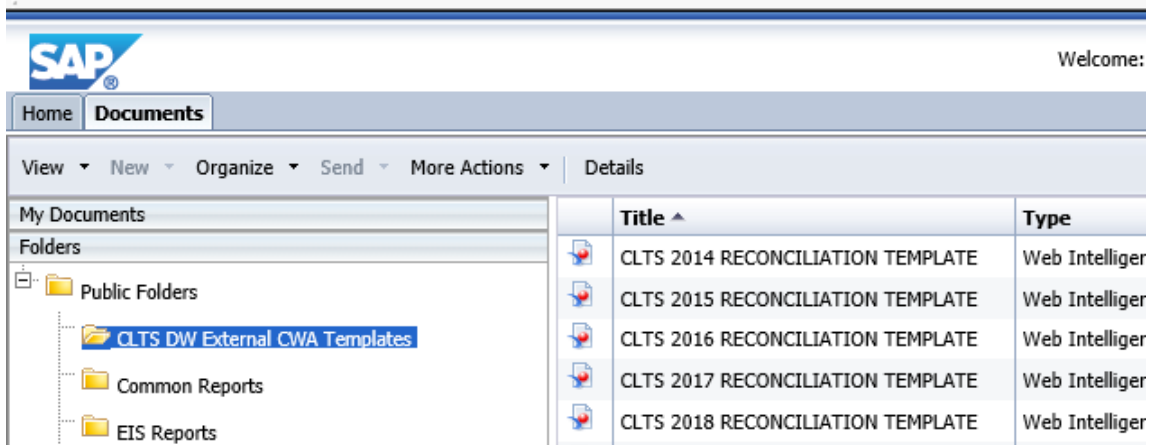
- 4) Open the [Partner Portal User Guide](#) and Go to the Table of Contents.
- 5) Navigate to **4.3 Requesting DSS Universe Access** to find instructions to access the **CLTS Claims Extract Universe**, which is identified as a DSS Universe in the DSS Universe drop down list.
- 6) If you are unable to complete the above, troubleshoot using the below resources:
  - a) **Contact your local security administrator** to confirm that they've approved your secure portal administrative access.
  - b) Email Business Objects questions to the DXC Help Desk at [VEDSDSSHelp@wisconsin.gov](mailto:VEDSDSSHelp@wisconsin.gov) or
  - c) Contact the SOS Desk by phone at 608-266-9198 for information.

### How to access and use the CLTS Reconciliation Template

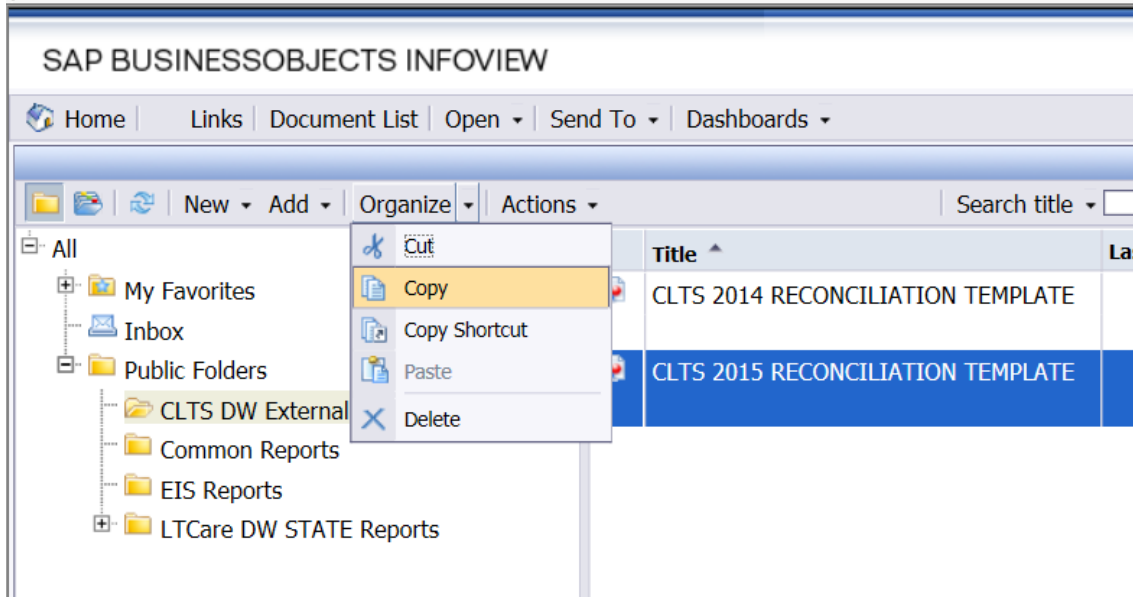
The CLTS Reconciliation Template is located in the CLTS DW External CWA Templates folder; however, CWAs will not be able to effectively use the CLTS Reconciliation Template while it is saved in the CLTS DW External CWA Templates folder. Instead, CWA fiscal staff must create a copy of the CLTS Reconciliation template in a local agency folder for use.

#### Step-by-step instructions:

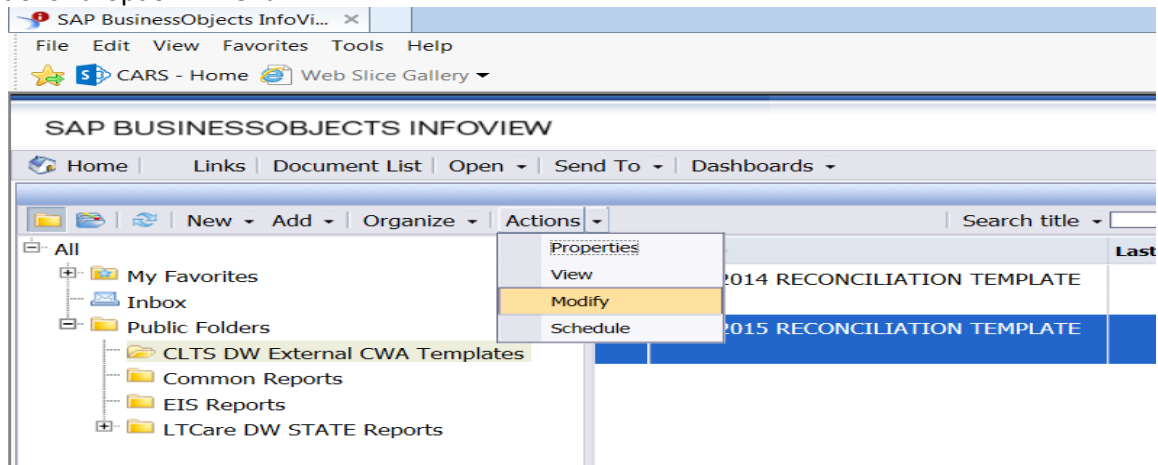
- 1) Go to the CLTS DW External CWA Templates folder.
- 2) Select the **CLTS [reconciliation year] RECONCILIATION TEMPLATE**.



- 3) Select “Copy” from the “Organize” dropdown menu.

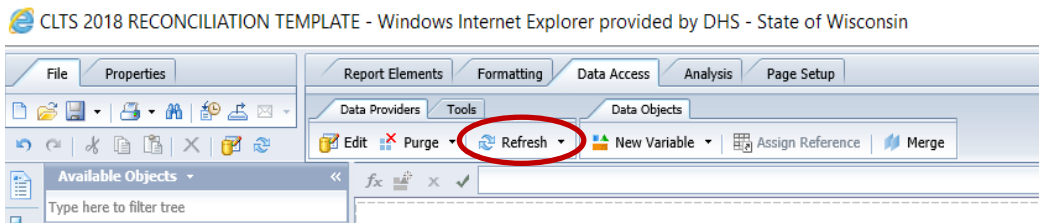


- 4) Choose a local agency folder, and select “Paste” from the “Organize” dropdown menu.  
5) Open the CLTS Reconciliation Template from your local agency folder, and select “Modify” from the “Actions” dropdown menu.

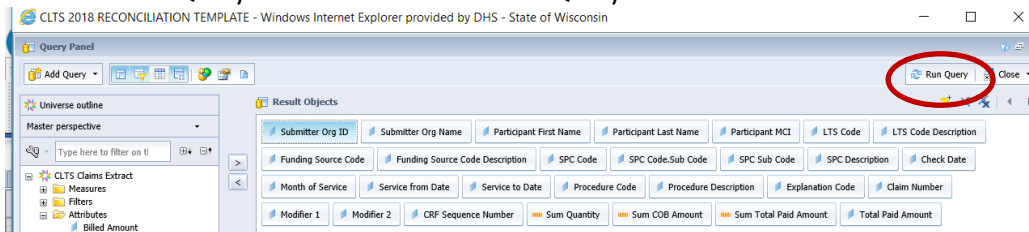


The report will open in the Edit Report screen.

1. From the Edit Report screen, there are two options to populate the template with current claims data.
  - a) From the Edit Report Screen use the Refresh Data button to populate the template with the county's paid claims data.



- b) From the Edit Query Screen click on the "Run Query" button.



Clicking on Run Query will open the Prompts box.

The query values in the template are prefilled with the CLTS reconciliation's appropriate "From" and "To" service and check dates.

Click "OK" in the Prompts box to populate the template with the county's paid claims data.

