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1 Introduction

Electronic visit verification (EVV) is a system that uses technology to verify that authorized services were provided. Through EVV, a worker providing personal care or supportive home care services sends visit data to an EVV vendor at the beginning and end of each visit using a mobile application, landline, or fixed device.

Setting up a secure ForwardHealth Provider Portal account will trigger the training process with the Wisconsin Department of Health Services (DHS) system. A Portal account also allows the provider agency to conduct business with DHS, including maintaining worker lists and making updates to business information. ForwardHealth brings together many DHS health care programs with the goal to create efficiencies for providers and to improve health outcomes for enrolled members.
2 Provider Agency Identification

In order for EVV information to be correctly associated to claims and encounters, DHS requires all provider agencies and workers to have a unique ID number. The process for acquiring this ID number differs among Medicaid-enrolled provider agencies, non-Medicaid provider enrolled agencies, and workers. Medicaid-enrolled provider agencies will use their Medicaid ID and will not need to go through the provider agency ID process for the purposes of EVV.

2.1 Medicaid-Enrolled Provider Agencies

Medicaid-enrolled agencies that provide personal care services will use their Medicaid ID for the purposes of EVV. Medicaid-enrolled agencies that provide personal care services need not take any further action for their provider agency to be identified for the purposes of EVV. However, they will need to take action to identify their workers for the purposes of EVV.

2.2 Non-Medicaid-Enrolled Provider Agency Identification Process

Provider agencies who are not required to be Medicaid-enrolled as part of their normal delivery of services to members or participants, such as supportive home care agencies, will need to request a provider agency ID through the ForwardHealth Portal for the purposes of EVV. To generate this ID, non-Medicaid-enrolled provider agencies will need to follow the steps below.


![ForwardHealth Portal Home Page](Image)

Figure 1 ForwardHealth Portal Home Page

Note: The ForwardHealth Portal supports the following browsers: Internet Explorer, Firefox, and Safari.
2. Click **Become a Provider**. The Provider Enrollment Information page will be displayed.

![Figure 2 Provider Enrollment Information Page](image)

3. Click **Start or Continue Your Enrollment Application**. The Enrollment Application page will be displayed.

![Figure 3 Enrollment Application Page](image)
4. Click **New Provider Agency Identification Process**. The Instructions panel will be displayed.

![Instructions Panel](image)

**Figure 4** Instructions Panel

5. Read the instructions. Click **Next** to continue. The Agency Name panel will be displayed.

   Note: All required fields are indicated with an asterisk (*).

![Agency Name Panel](image)

**Figure 5** Agency Name Panel

6. Enter the full business name of the EVV provider agency.
7. Click **Next**. The Mailing Address panel will be displayed.

![Mailing Address Panel](image)

**Figure 6** Mailing Address Panel

8. Enter the primary contact for EVV, including their name in the *Attention Line* field, full mailing address, nine-digit zip code, phone number, and email address.

9. Click **Next**. The Tax Information panel will be displayed.

![Tax Information Panel](image)

**Figure 7** Tax Information Panel
10. Enter the business’s tax information in the corresponding fields. If there is not a prior match to the tax ID number (TIN) within the ForwardHealth system, the panel will refresh and display the “1099 Address” section.

11. Enter the business’s address information as it appears on its Internal Revenue Service 1099 tax form.
12. Once all required fields have been completed, click **Next**. The Attestation panel will be displayed.

![Attestation Panel](image)

**Figure 9** Attestation Panel

The Attestation panel contains fields for providers to attest to meeting the requirements as an EVV provider and the validity of the information they have provided in the identification process.

13. Read the attestation statements. If the statements are all true, click the **I attest to the above statements** checkbox.

14. Provide an electronic signature by entering the user’s first name, last name, and today’s date in the corresponding fields.

15. Click **Submit**. The Application Submitted panel will be displayed.

![Application Submitted Panel](image)

**Figure 10** Application Submitted Panel
This panel displays the provider agency ID. This is the ID that DHS will use to identify the agency and begin the set-up process for the Sandata EVV system or aggregator. Users can print a copy of all the submitted information, including their provider agency ID, by clicking Save.

![Example EVV Agency Identification Report](image)

*Figure 11 Example EVV Agency Identification Report*
Once the user has submitted their information and successfully received their provider agency ID, the system will automatically begin the process of generating a PIN letter. This letter will be sent to the user within 10 days of obtaining their provider agency ID and will allow the user to create a ForwardHealth Portal Account. If the user does not receive their PIN letter in the mail within 10 calendar days, they should call Wisconsin EVV Customer Care at 833-931-2035, Monday–Friday, 7 a.m.–6 p.m.
Access to the secure Portal is not possible without a PIN. The letter includes a login ID and temporary password. For security purposes, the login ID contains only digits 3, 4, 5, and 6 of the Provider ID.

Dear Provider Agency:

Thank you for starting the process of identifying your agency for Electronic Visit Verification (EVV). Below is the ForwardHealth Provider Portal account ID and PIN associated with your agency. You will use these to set up your secure provider account on the ForwardHealth Portal.

Setting up your secure ForwardHealth Provider Portal account will trigger the training process with our EVV vendor, Sambas. Your Portal account also allows your provider agency to conduct business with ForwardHealth, including maintaining your worker lists and making demographic updates (such as changes to your address or tax information).

Provider Agency ID: xx3456xxxx
Provider Type/Specialty: EVV/EVV Provider
Zip Code: 55555-1111

For security purposes, only digits 3, 4, 5, and 6 of your Provider Agency ID are shown.

To create your secure Portal account:
• Go to the ForwardHealth Portal at www.forwardhealth.wi.gov/
• Click the Providers button.
• Under the Login to Secure Site box on the right side of the page, click the Logging in for the first time? link.
• Enter your Login ID and PIN.

Login ID: XXXXXXXXXXXX
PIN: XXXXXXXXXXX

You can find detailed instructions and helpful hints on setting up your secure Portal account in the ForwardHealth Portal Account User Guide at www.forwardhealth.wi.gov/. Please contact Wisconsin EVV Customer Care at VDXC.ContactEVV@Wisconsin.gov or 833-951-2035 with any questions.

F-02663 (06/2020)

www.dhs.wisconsin.gov

Figure 13 PIN Letter
3 Set Up an Account

After receiving a PIN letter, users may set up an account on the ForwardHealth Portal. Users will use the login ID and PIN from the PIN letter to create a user name and password as well as to enter contact and security information.

3.1 Logging in for First Time

1. After the PIN letter is received, access the ForwardHealth Portal at https://www.forwardhealth.wi.gov/.

![ForwardHealth Portal Page](image1.png)

Figure 14 ForwardHealth Portal Page
2. Click **Login**. The ForwardHealth Portal Login box will be displayed.

![ForwardHealth Portal Login](image)

- Logging in for the first time?
- Forgot your password?
- Account Users Guide

*Figure 15* ForwardHealth Portal Login
3. Click **Logging in for the first time?** The Account Setup page will be displayed.

![Account Setup Page](image)

**Figure 16** Account Setup Page

4. Enter the Login ID and PIN listed in the PIN letter.

   For security purposes, the PIN letter will contain only four digits of the Provider Agency ID reported; however, users should **enter their entire** Provider Agency ID in the Login ID field.

   The PIN from the PIN letter can only be used once. After the account has been established, the PIN cannot be used again.
5. Click **Setup Account**. The Account Setup user profile page will be displayed.

![Account Setup User Profile Page](image)

**Figure 17** Account Setup User Profile Page

6. Enter information in the fields. It is necessary to **complete all the fields** on this page.
   - The user name must be between six–20 characters and can only contain letters and numbers. The user name is not case-sensitive.
     
     **Note:** The user name cannot be changed without deactivating the account.
   - The password must be between eight–15 characters and must contain three different types of characters such as uppercase letters, lowercase letters, special characters, or numbers. The password must be unique and cannot contain information from the user name, contact first name, contact last name, or the security answers.
   - The telephone number must include the area code. The number will be auto-formatted.
• The security answers must have at least two characters and cannot contain special characters (except for spaces). The security answers allow the user to validate their identity and reset their password if necessary. Security answers are case-sensitive.

7. Read the Security and Confidentiality agreement.

8. Check the agreement checkbox.

9. Click Submit. If an error message is received, correct the error(s) and click Submit again.

   The License for Use of Physicians’ Current Procedural Terminology, Fourth Edition (CPT) and Point and Click License for Use of Current Dental Terminology (CDT) agreements page will be displayed. This allows users to access the secure ForwardHealth Portal as they are billing Medicaid.

   ![End User Point and Click License Agreements](image)

   Figure 18 End User Point and Click License Agreements

10. Click the radio button next to “I Accept.” Click Submit Agreement.

    Note: If “I Do Not Accept” is selected, the user will be returned to the ForwardHealth Portal home page and will not be able to access the secure Provider Portal.
11. The user’s secure Provider page will be displayed. EVV provider agencies will only have access to the EVV links displayed under the Quick Links section of their secure Provider page.

![Secure Provider Page—EVV Provider](image1.png)

**Figure 19 Secure Provider Page—EVV Provider**

### 3.2 Reset Password

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

![ForwardHealth Portal Login](image2.png)

**Figure 20 ForwardHealth Portal Login**
3. Click **Forgot your password?** The Reset Password page will be displayed.

![Reset Password Page](image1.png)

**Figure 21** Reset Password Page

4. Enter the account user name.

5. Click **Next**. The Reset Password page with two of the four security questions selected when the account was set up will be displayed.

![Reset Password Page with Security Questions](image2.png)

**Figure 22** Reset Password Page with Security Questions

6. Enter the answers to the security questions. The answers are case-sensitive.
7. Click **Next**. The Reset Password page with new password fields will be displayed.

![Reset Password Page With New Password Fields](image)

8. Enter a new password (twice for confirmation).

9. Click **Submit**. The user’s secure Provider page will be displayed.

### 3.3 Account Types

Three different account types are available through the ForwardHealth Portal. Access to certain features or functions on the Portal is determined by the account type assigned to the user. Through these different account types, a high level of security and accountability is maintained.

- **Administrative accounts**—The user who establishes the Portal account with the Login ID and PIN (from the PIN letter) is considered the account administrator and is responsible for managing the Portal account. Administrative accounts are granted complete access to the following functions in the secure Portal:
  - Home
  - Search
  - Electronic Visit Secure Home
  - Account
Each service location (certification/provider file) can only have one user designated as an account administrator; however, multiple service locations can be attached to the same account administrator.

- **Clerk administrative accounts**—Administrative accounts can set up clerk accounts with access to any or all of the roles available to the administrative account. If a new role becomes available, that role may be assigned to a clerk account. A clerk account can be added to multiple organizations to allow one clerk access to multiple organizations. The functionality of the clerk administrative account includes the following:
  - Add Worker
  - Upload Worker
  - Manage Worker
  - List of Workers Within Your Agency
  - EVV Demographic Maintenance
  - EVV Portal User Guide

- **Clerk accounts**—Clerk accounts may be granted clerk administrative rights. A clerk administrative account can create new clerk accounts with access to any or all of the roles to which the clerk administrative account has access. Clerk accounts can also delete and manage clerk accounts under their account security.
4 Clerk Maintenance

If more than one person will be working on the account, clerk accounts must be established.

On the Account page, click **Clerk Maintenance**. The Clerk Maintenance Search panel will be displayed.

![Clerk Maintenance Search Panel](image)

**Figure 24** Clerk Maintenance Search Panel

Through the Clerk Maintenance panels, users with administrative and clerk administrative accounts can search for, add, or remove clerks.

### 4.1 Add a Clerk

The Add Clerk function allows the user to add new clerks.
1. Click **Add Clerk** located at the bottom of the Clerk Maintenance Search panel. The Clerk Account panel will be displayed.

![Figure 25 Clerk Account Panel](image)

Complete the following steps to add a new clerk account:

- Enter a user name. The user name must be between six–20 characters and can only contain letters and numbers. The user name is not case-sensitive.
- Enter the new clerk’s contact first name and contact last name.
- Enter the new clerk’s telephone number (and extension if applicable).
- Enter the new clerk’s email (twice for confirmation).
- Enter an initial password for the new clerk (twice for confirmation).

The password must be between eight–15 characters and must contain three different types of characters such as uppercase letters, lowercase letters, special characters, or numbers. The password must be unique and cannot contain information from the user name, contact first name, contact last name, or the security answers.

Note: Clerks must change the password set up by the administrative account the first time they log in.
If adding a clerk account that has already been created but needs to be added to a new organization, complete the following steps:

- Click **Search** to the right of the User Name field. The User Name Search box will be displayed.

![User Name Search Box](image)

**Figure 26** User Name Search Box

- Enter the clerk account’s username, first name, or last name.

- Click **Search**. The clerk’s information will be displayed in the “Clerk Details” section.

![Search Results Section](image)

**Figure 27** Search Results Section

- Click the row of the applicable clerk account. The User Name Search box will close and the clerk account information will be auto-populated in the “Clerk Details” section of the Clerk Account panel.

![Clerk Account Information Auto-populated on Clerk Account Panel](image)

**Figure 28** Clerk Account Information Auto-populated on Clerk Account Panel

### 4.2 Search for a Clerk

The Clerk Maintenance Search panel allows a user to select an existing clerk within the provider organization.
1. Enter information for the clerk in any combination in the Search Criteria section. Alternatively, leave the fields blank to bring up a list of all clerks associated with the provider organization.

![Search Criteria Section](image)

**Figure 29** Search Criteria Section

2. Click **Search**.

3. Click the row containing the clerk’s name in the “Search Results” section.

![Search Results Section](image)

**Figure 30** Search Results Section

The clerk’s information will populate in the “Selected Clerk” section.

![Search Results and Selected Clerk Sections](image)

**Figure 31** Search Results and Selected Clerk Sections
4.3 Delete a Clerk Account

1. On the Clerk Maintenance Search panel, click **Remove Clerk** to initiate the record deletion. A dialog box confirming the deletion will be displayed.

![Dialog Box](image)

**Figure 32** Dialog Box

2. Click **OK**. A confirmation message will be displayed at the top of the Clerk Maintenance Search page.

<table>
<thead>
<tr>
<th>The following messages were generated:</th>
</tr>
</thead>
<tbody>
<tr>
<td>The user's access has been removed for this provider.</td>
</tr>
</tbody>
</table>

**Figure 33** Confirmation Message
5 Clerk Last Logon

This function allows users with administrative accounts to search, identify, and remove inactive clerk accounts.

On the Account page, click Clerk Last Logon. The Clerk Last Logon panel will be displayed.

Through the Clerk Last Logon panel, users with administrative accounts can search for users with inactive accounts and can also identify and remove clerks from a list of their organization’s clerk accounts.

Note: Users with clerk administrative accounts may not administer their own accounts or other administrative or clerk administrative accounts.

5.1 Search and Remove a Clerk Account

The Clerk Last Logon panel allows a user to select an existing clerk within the provider organization based on the number of days since their last logon.

1. In the Search Criteria section, click the button indicating the number of days since the clerk’s last logon. Options include periods of at least 60 days, 90 days, or 120 days from the clerk’s last logon.
2. Enter any information for the clerk in any combination in the Search Criteria section. Alternatively, leave the First Name, Last Name, and User Name fields blank to bring up a list of all clerks associated with the provider organization based on the number of days since their last logon.

![Search Criteria Section](image)

**Figure 35** Search Criteria Section

3. Click **Search**. The clerk(s) will be listed under the “List of clerks” section.

![List of Clerks Section](image)

**Figure 36** List of Clerks Section

4. Check the box under the Remove From Org column.

5. Click **Remove selected Clerks**. The selected clerks will be removed from the ForwardHealth Portal.

   Note: The user can click **Cancel** to return to their secure account page.
6 EVV Demographic Maintenance Tool

The EVV demographic maintenance tool on the ForwardHealth Portal allows EVV providers to securely, efficiently, and conveniently update provider information, such as addresses and tax information.

When an EVV provider updates information using the demographic maintenance tool, in most cases, ForwardHealth immediately updates the provider’s information, which allows for more efficient business practices.

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

![ForwardHealth Portal Login](image)

**Figure 38** ForwardHealth Portal Login

3. Enter username.

4. Enter password.

5. Click **Go!** The secure Provider page will be displayed.

![Secure Provider Page](image)

**Figure 39** Secure Provider Page
6. Click EVV Demographic Maintenance. The Instructions panel will be displayed.

![Instructions Panel](image)

**Figure 40** Instructions Panel

7. Read the instructions and then click **Next**. The Mailing Address panel will be displayed. The user’s mailing address information will be populated in the fields.

![Mailing Address Panel](image)

**Figure 41** Mailing Address Panel

8. Delete any information that needs to be changed and enter the new information.

Any changes to the mailing address on file with ForwardHealth may alter the zip+4 code information required on transactions. Users should verify the zip+4 code for the address on the [U.S. Postal Service website](https://www.usps.com).
9. Click **Next**. The Tax Information and Submit panel will be displayed. The user’s tax information will be populated in the fields.

![Tax Information and Submit Panel](image)

**Figure 42** Tax Information and Submit Panel

10. Delete the information that needs to be changed and enter the new information.

   Note: Information in the 1099 Address section can only be changed after changing the TIN.

11. Once all necessary changes have been made, click **Submit**. A confirmation message will be displayed.

    ![Confirmation Message](image)

    **Figure 43** Confirmation Message

    If an error message is received, correct the error(s) and click **Submit** again.
7 Worker Association

For the purposes of EVV, provider agencies are required to associate each of their workers who provide personal care or applicable supportive home care services for Medicaid members. Provider agencies can use the ForwardHealth Portal to do this in two ways: by using the Add Worker or Upload Worker File links. These links are displayed under the Quick Links or Electronic Visit Verification sections of their secure Provider page. Provider agencies may also indicate if a worker is exempt from EVV requirements if the worker is not required to capture EVV for any of the people they provide services to for the agency.

Note: On their secure provider page, EVV providers will only have access to the EVV links located under the Quick Links section. These links are displayed in the upper right side of the secure provider page. Medicaid-enrolled providers will have access to the links located under the Home Page, Quick Links, and Electronic Visit Verification Links sections. The EVV links are displayed on the bottom right side of the secure provider page under the Electronic Visit Verification Links section.

![Secure Provider Page—EVV Provider](Figure 44)
Figure 45  Secure Provider Page—Medicaid-Enrolled Provider
7.2 Add Worker

This method of worker association allows a provider agency to manually enter an individual worker’s information. To avoid duplication, always start by searching for the worker first.

1. On the secure provider page, click Add Worker. The Add Worker panel will be displayed.

![Add Worker Panel](image)

2. Enter the worker’s first name, last name, Social Security number, and date of birth into the fields in the “Worker Search Criteria” section. The last name and Social Security number fields are required to perform a worker search.

3. Click Search. The panel will refresh and display any results in the “Worker Search Results” section. If no matches to the worker’s information are found in the system, a “No Match Found” message will be displayed under Worker Search Results.
7.2.1 No Matches Found

If no match is found, the worker is new to the ForwardHealth Portal and will need to be added. Enter the worker’s information into the following fields in the “Add/Associate Worker” section:

- First Name
- Middle Initial
- Last Name
- Social Security Number
- Date of Birth (in MM/DD/YYYY format)
- Gender (optional)
- Worker Email
Note: The email address must be unique to that worker and cannot be used by anyone else for Sandata EVV purposes. The worker email can be distinct and separate for each provider agency they work for and is saved and associated with that particular agency.

- **Confirm Worker Email**

- **Worker Start Date (in MM/DD/YYYY format)**

  Note: The worker’s EVV start date is the first date the worker will begin using EVV and can be today’s date or a future date. The worker’s EVV start date cannot be in the past. The worker’s EVV start date indicates the date the worker will be associated with the agency for the purposes of EVV and their information sent to Sandata. The worker will receive an email with a temporary password for the option to access Sandata Mobile Connect a day or two after their start date. If the worker’s EVV start date field is left blank, the system will default the EVV start date to today’s date.

- **Exempt from EVV Requirements**

  Note: This box should be checked if the **provider agency determines that a worker is exempt from EVV requirements**. The system will assign the worker a unique ID; however, the worker’s information will not be sent to Sandata on the worker file.

  If the provider agency determines a worker who was previously exempt from EVV requirements is no longer exempt, the provider agency can use the Manage Workers panel to uncheck the box in the Exempt from EVV Requirements** field.

  If the box is checked, the Worker Email and Confirm Worker Email fields are optional. If the agency enters a worker email in the Worker Email field, the Confirm Worker Email field is required. If the box is not checked, the Worker Email and Confirm Worker Email fields are required.

4. Click Submit. The Worker Submitted panel will be displayed.

![Add Worker >> Worker Submitted](image)

**Figure 48** Worker Submitted Panel

The Worker Submitted panel confirms that the worker has been correctly associated with the user’s provider agency and displays the worker’s unique ID number for Sandata EVV purposes. This number will also be the worker’s Santrax ID if using the DHS-provided EVV solution. Provide this number to the worker if using the DHS-provided EVV solution.
5. Click **Exit** to return to secure Provider page.

### 7.2.2 Match Found

When a user searches for a worker and a match is found within the system, their information will be displayed in the “Worker Search Results” section. Information must be checked to ensure it is accurate.

1. Click on the row containing the worker’s name. The panel will be refreshed, and the worker’s information will be populated in the fields under the “Add/Associate Worker” section.

![Add Worker Panel With Worker Information Populated](image)

**Figure 49** Add Worker Panel With Worker Information Populated

2. Enter the worker’s email address in the Worker Email and Confirm Worker Email fields. The email address must be unique to that worker and cannot be used by anyone else for Sandata EVV purposes.
Note: If the box is checked in the Exempt from EVV Requirements** field, the Worker Email and Confirm Worker Email fields are optional.

3. Enter the first date the worker will begin using EVV in the Worker Start Date field in MM/DD/YYYY format.

Note: The worker’s EVV start date is the first date the worker will begin using EVV and can be today’s date or a future date. The worker’s EVV start date cannot be in the past. The worker’s EVV start date indicates the date the worker will be associated with the agency for the purposes of EVV and their information sent to Sandata. The worker will receive an email with a temporary password for the option to access Sandata Mobile Connect a day or two after their start date. If the worker’s EVV start date field is left blank, the system will default the EVV start date to today’s date.

4. Click Submit. The Worker Submitted panel will be displayed.

![Figure 50 Worker Submitted Panel](image)

The Worker Submitted panel confirms that the worker has been correctly associated with the user’s provider agency and displays the worker’s unique ID number for Sandata EVV purposes. This number will also be the worker’s Santrax ID if using the DHS-provided EVV solution. Provide this number to the worker if using the DHS-provided EVV solution.

5. Click Exit to return to the secure Provider page.
7.3 Upload Worker File

The Upload Worker File method of worker association allows users to associate multiple workers at once by uploading a prepared Microsoft Excel file.

1. On the secure Provider page, click **Upload Worker File**. The Upload Worker File panel will be displayed.

![Upload Worker File Panel](image)

2. Click **Download Worker File Excel Template** and save the template to the user’s computer.

3. Navigate to the saved location on the user’s computer and open the template file.

4. Within the template file, enter the information for the workers that will be associated to the provider agency. List the worker’s first name followed by the last name as indicated in the template file.

Note: The email address must be unique to that worker and cannot be used by anyone else for Sandata EVV purposes. The worker’s EVV start date is the first date the worker will begin using EVV and can be today’s date or a future date. The worker’s EVV start date cannot be in the past. The worker’s EVV start date indicates the date the worker will be associated with the agency for the purposes of EVV and their information sent to Sandata. The worker will receive an email with a temporary password for the option to access Sandata Mobile Connect a day or two after their start date. If the worker’s EVV start date field is left blank, the system will default the EVV start date to today’s date.

Valid values for the Exempt_from_EVV_Requirements column are “Y” for yes, “N” for no, or blank. If the column is blank, the default will be “N.” If an invalid value is entered, the following message will be displayed: “The Exempt from EVV Requirements field contains an invalid value.” The worker’s email address is optional for exempt workers.

Fields in bold are required.
5. Once the information is entered, the user should save the file to their computer and exit the Excel application.

6. Return to the Upload Worker File panel.

7. Click **Browse**.

8. Locate and select the saved file on the user’s computer. Click **Open** to attach the file to the panel.

9. Click **Upload File** to upload the file.
10. Once uploading is complete, the panel will be refreshed and the name of the field and associated results will be displayed in the “Uploaded File” and “File Errors” sections.

If the file contains any errors, they will be displayed and detailed in the “File Errors” section. There are two options if the file contains errors:

- The first option is to correct the errors in the file immediately and re-upload it.
  
  Note: When the updated file is uploaded, the updated file’s results will replace the previous file’s results.

- The second option is to click **Submit** to upload the file as is to the system.
  
  Note: Only those worker records without errors will be processed. If this option is chosen, the user will need to restart the process of uploading the file with corrected worker records. A copy of the worker errors can be saved after submission using the options on the next screen.
11. Once the user clicks **Submit** and the workers are associated to the user’s provider agency, the Workers Submitted panel will be displayed.

![Workers Submitted Panel](image)

**Worker Submission Completed Successfully**

- **Save** a copy of the worker identifications for your records only.
- **Save** a copy of the worker errors for your records only.

Figure 56  Workers Submitted Panel

The Workers Submitted panel allows users to save copies of the worker records that were created within the ForwardHealth system. This information includes their unique worker ID and any copies of the error report for the submitted Excel worker file. The worker ID should be provided to the worker for Sandata EVV purposes.

12. Click **Save** to save a copy of the corresponding file.

13. Click **Exit** to return to the secure Provider page.
8 Manage Workers

Provider agencies can manage their workers’ email address and association to the provider agency on the ForwardHealth Portal using the Manage Workers tool.

1. On the secure Provider page, click **Manage Workers** under the Quick Links menu located on the right side of the page. The Manage Workers panel will be displayed.

2. Enter information for the worker whose information needs updating, then click **Search**. The panel will be refreshed and results matching the search criteria will be displayed in the “Worker Search Results” section. The last name and Social Security number fields are required to perform a worker search. If no search criteria were entered and the user selects the Search button, a list of all workers associated with the provider agency will be displayed.

3. Click the row containing the worker’s name. The panel will be refreshed, and the worker’s information will be populated in the fields in the “Worker Information” section.
Note: If the box in the Exempt from EVV Requirements** field is checked and a provider agency determines the worker is no longer exempt from EVV requirements, they can uncheck the box. The provider agency will also need to add a worker email address. The action of unchecking the box and adding the worker email address will ensure the worker will be sent to Sandata on the worker file.

Note: The only editable fields are the Worker Email, Worker End Date, and Exempt from EVV Requirements**. If changes to other fields are needed, the provider agency will need to contact Wisconsin EVV Customer Care at 833-931-2035, Monday–Friday, 7 a.m.–6 p.m.

![Figure 58 Manage Workers Panel With Worker Information Populated](image-url)
4. Click the **Update Worker Email** checkbox. The New Worker Email and Confirm New Worker Email fields will be displayed.

![Figure 59 New Worker Email Fields](image)

5. Enter the new email for the worker in the fields.

Note: The email address must be unique to that worker and cannot be used by anyone else for Sandata EVV purposes.

6. If the worker is no longer employed with the provider agency, the user can disassociate them from the provider agency by entering the last date of employment in the Worker End Date field in MM/DD/YYYY format.

![Figure 60 Manage Workers Panel With Disassociating Information](image)
Note: Adding a worker’s end date will only affect that provider agency and does not affect other provider agencies that the worker may be employed with.

7. Click **Submit**. The worker’s information will be updated within the ForwardHealth system, and the Worker Change Submitted panel will be displayed.

![Worker Change Submitted Panel](image)

**Figure 61**  Worker Change Submitted Panel

8. Click **Exit** to return to the secure Provider page.
9 List of Workers Within Your Agency

Users can view reports that list all the workers currently associated with the provider agency or all workers including workers that have been end dated.

1. On the secure Provider page, click List of Workers within your Agency under the Quick Links menu located on the right side of the page. The List of Workers panel will display.

2. Select “All Workers” or “All Active Workers.”

3. Click the Generate Workers Report link and the corresponding file in comma separated value (CSV) format will be opened. This file can also be saved as an Excel file.

Note: All active workers will show as the high-end system date of 12/31/2299.

Figure 62  List of Workers Within Your Agency Panel

Figure 63  List of All Workers
<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Title: AgencyID 100000001 EVV IDENTIFICATION UAT - All Active Workers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Worker ID</td>
<td>First Name</td>
<td>Last Name</td>
<td>SSN</td>
<td>Worker Email</td>
<td>Start Date</td>
<td>End Date</td>
<td>Exempt from EVV Requirements</td>
</tr>
<tr>
<td>3</td>
<td>100005310</td>
<td>WILL</td>
<td>DO</td>
<td>xxx-xx-6271</td>
<td>7/22/2026</td>
<td>12/31/2299</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>100005323</td>
<td>IMA</td>
<td>CAREGIVER</td>
<td>xxx-xx-6755</td>
<td>7/27/2026</td>
<td>12/31/2299</td>
<td>N</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 64**  List of All Active Workers