



User Guide to the CCOP County Portal

December 2025

Version Information

Version	Added or Updated Section(s)	Effective Date
1.0	N/A	12/23/25
1.1	Added Section 4: FAQs and Support Information	2/5/26
1.2	Updated Section 4: FAQs and Support Information	3/10/26

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1. Purpose and Intended Use

This document serves as a comprehensive guide for county users on accessing and effectively using the CCOP County Portal.

Note: The images in this guide are from a test environment and are for illustrative purposes only. The information shown does not represent live data.

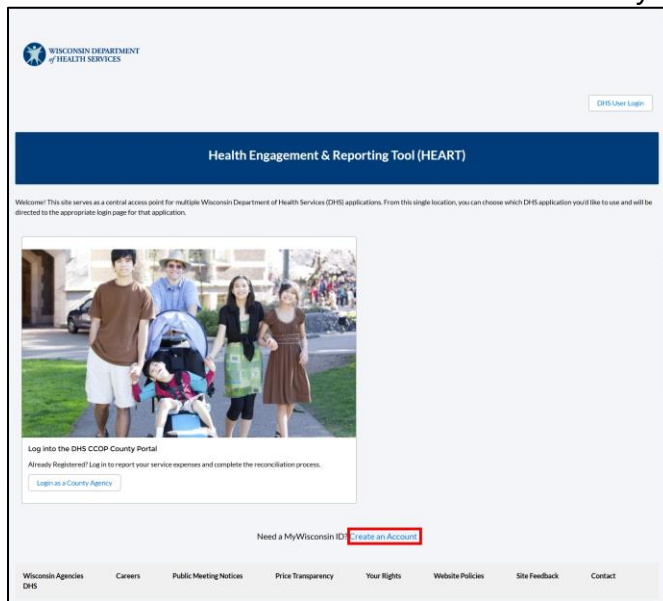
2. Logging in for the First Time

County users must have a MyWisconsin ID to access the CCOP County Portal. Those Users who do not already have a MyWisconsin ID must create one before proceeding.

If you already have a MyWisconsin ID, please refer to section 2.2 in this document.

2.1 Creating a MyWisconsin ID

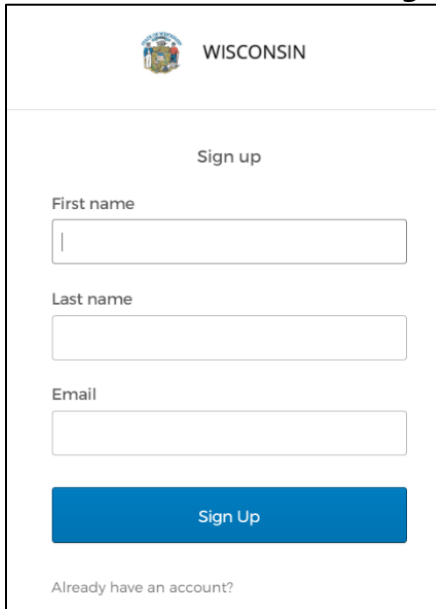
1. Go to the landing page at <https://bfamboss.my.site.com/HEART/s/landing> and select **Create an Account** next to "Need a MyWisconsin ID?"



2. On the "MyWisconsin ID Sign In" page, select **Sign up**.

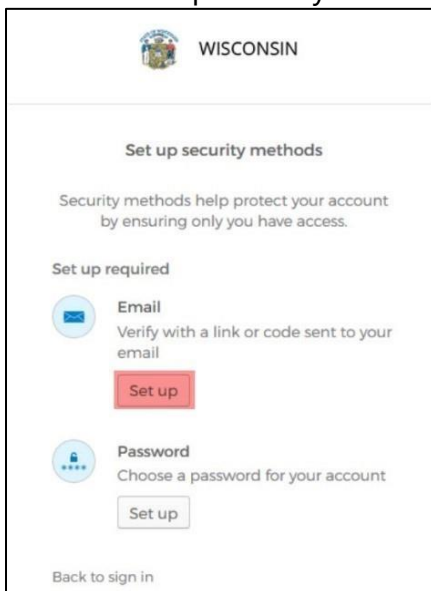
A screenshot of the "MyWisconsin ID Sign In" page. The page has a white background with the Wisconsin state seal and the word "WISCONSIN" at the top. The title "MyWisconsin ID Sign In" is centered. Below the title, there is a section for "Email address" with the placeholder text "example - user@domain.com". A text input field is provided for the email address. Below the input field is a blue button labeled "Next". At the bottom left, there are links for "Unlock account?" and "Help". At the bottom right, a red button labeled "Sign up" is visible, preceded by the text "Don't have an account?".

3. On the "Sign up" page, enter a first name, last name, and a **non-State** (DHS) email address; then select **Sign Up**.



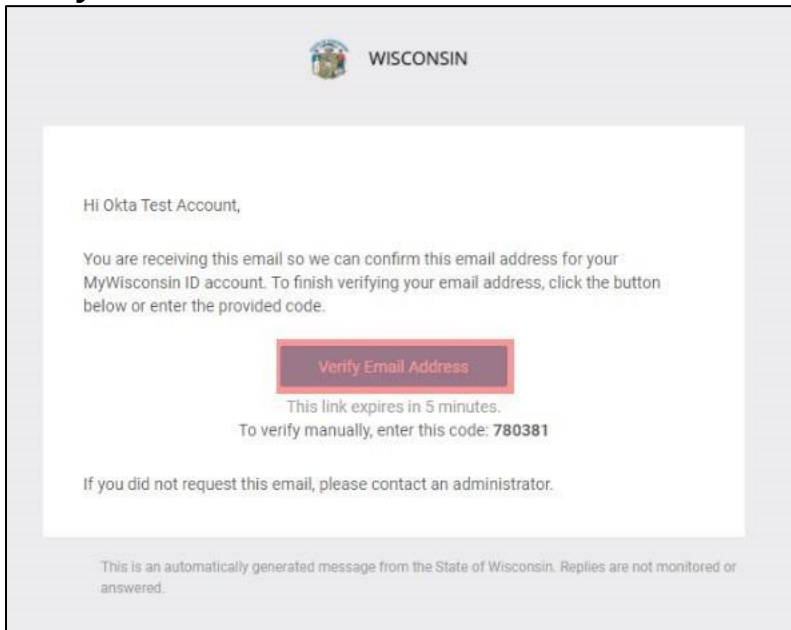
The screenshot shows the "Sign up" page for the WISCONSIN portal. At the top is the WISCONSIN logo and the word "WISCONSIN". Below this is a horizontal line, followed by the heading "Sign up". There are three input fields: "First name", "Last name", and "Email". Below the "Email" field is a blue "Sign Up" button. At the bottom, there is a link that says "Already have an account?".

4. On the "Set up security methods" page, select **Set up** under Email.

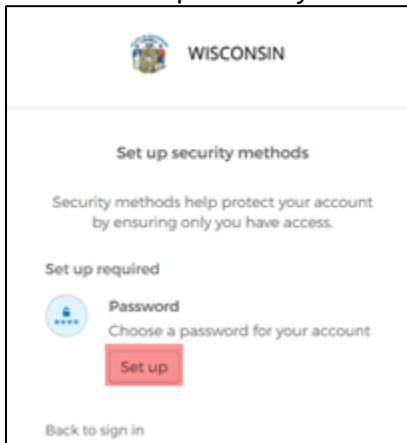


The screenshot shows the "Set up security methods" page for the WISCONSIN portal. At the top is the WISCONSIN logo and the word "WISCONSIN". Below this is a horizontal line, followed by the heading "Set up security methods". A sub-heading reads: "Security methods help protect your account by ensuring only you have access." Below this is the section "Set up required". There are two options: "Email" and "Password". The "Email" option has a blue envelope icon and a red "Set up" button. The "Password" option has a blue padlock icon and a grey "Set up" button. At the bottom, there is a link that says "Back to sign in".

5. Open the email entered in Step 3, check for the verification email, and select **Verify Email Address**.



6. In the "Set up security methods" page, select **Set up** under Password.



7. Enter a unique password in the “Set up password” page, re-enter it, and select **Next**.

 WISCONSIN



Set up password

Password requirements:

- At least 16 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- No parts of your username
- Does not include your first name
- Does not include your last name
- Your password cannot be any of your last 24 passwords
- At least 2 hour(s) must have elapsed since you last changed your password

Enter password

Re-enter password

Next

[Back to sign in](#)

8. On the “Set up security methods” page, choose a multifactor authentication (MFA) method. Be sure to confirm access to the MFA device before choosing.

 WISCONSIN

Set up security methods

Security methods help protect your account by ensuring only you have access.

Set up required

**Google Authenticator**

Enter a temporary code generated from the Google Authenticator app.

Set up

**Okta Verify**

Okta Verify is an authenticator app, installed on your phone, used to prove your identity

Set up

**Phone**

Verify with a code sent to your phone

Set up

**Security Key or Biometric Authenticator**

Use a security key or a biometric authenticator to sign in

Set up

[Back to sign in](#)

9. After choosing an MFA, select **Finish**.

Set up security methods

Security methods help protect your account by ensuring only you have access.

Set up optional

 **Google Authenticator**
Enter a temporary code generated from the Google Authenticator app.
[Set up](#)

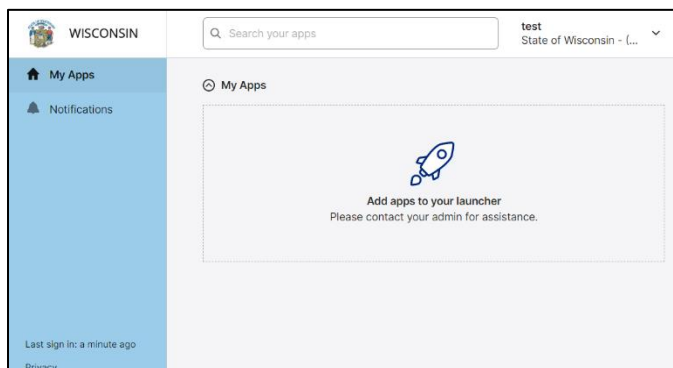
 **Okta Verify**
Okta Verify is an authenticator app, installed on your phone, used to prove your identity
[Set up](#)

 **Phone**
Verify with a code sent to your phone
[Set up](#)

Finish

[Back to sign in](#)

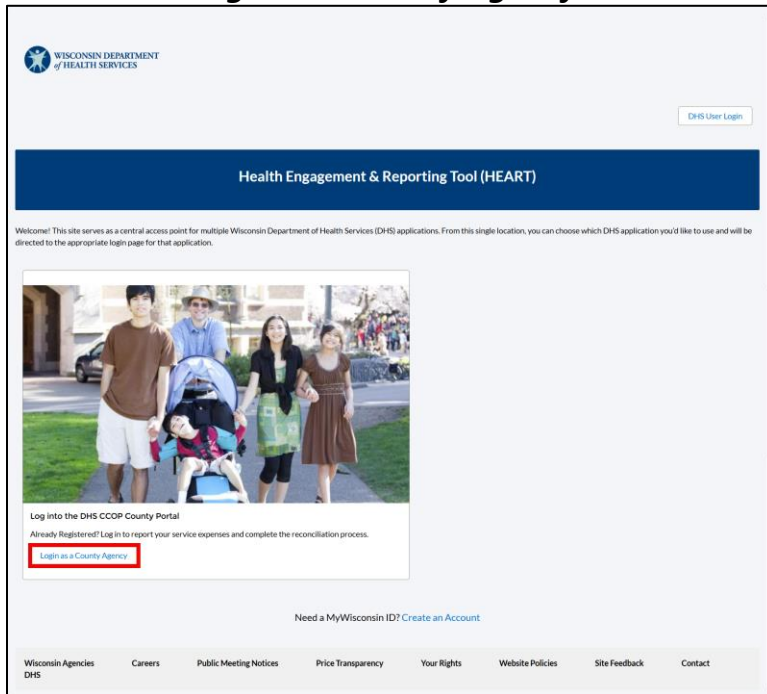
This will complete the setup of the MyWisconsin ID account registration. Close the My Apps dashboard and log in to the CCOP County Portal



Note: Contact the MyWisconsin ID Account Service Desk at 608-471-6667 if you experience any issue setting up your MyWisconsin ID and password.

2.2 Logging in

1. Go to the landing page at <https://bfamboss.my.site.com/HEART/s/landing> and select **Login as a County Agency**.

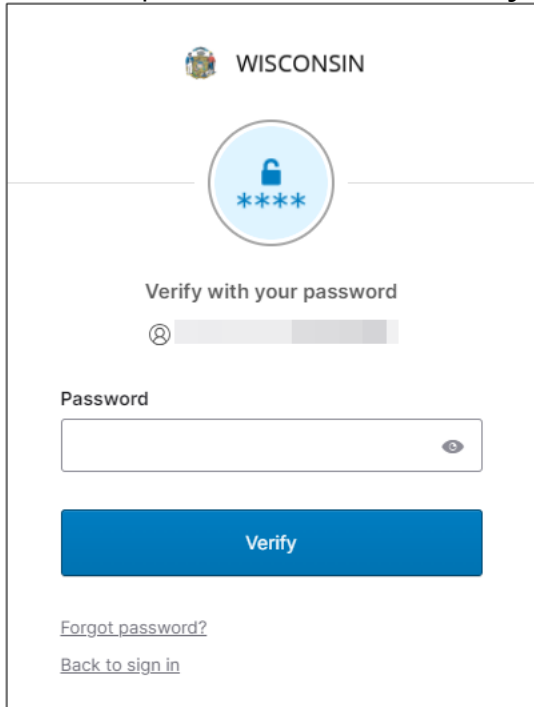


Note: If your browser has an open MyWisconsin ID session, you will go directly to the CCOP County Portal home page without being prompted to log in (Steps 2-5).

2. Enter the MyWisconsin ID.

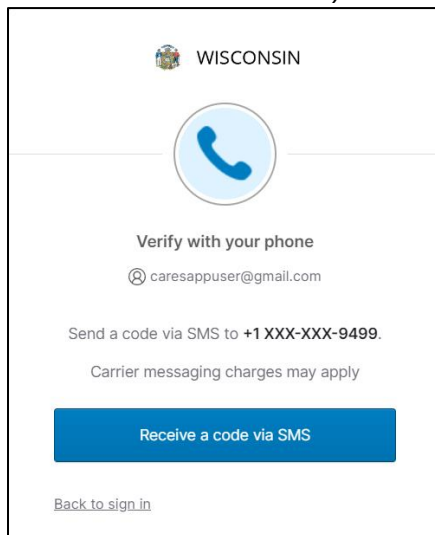
The screenshot shows the "MyWisconsin ID Sign In" form. At the top is the Wisconsin state seal and the word "WISCONSIN". Below this is the heading "MyWisconsin ID Sign In". The form has a label "Email address" followed by the example text "example - user@domain.com". Below the text is an empty input field. Under the input field is a blue button labeled "Next". Below the button are two links: "Unlock account?" and "Help". At the bottom of the form is a link: "Don't have an account? Sign up".

3. Enter the password and select **Verify**.



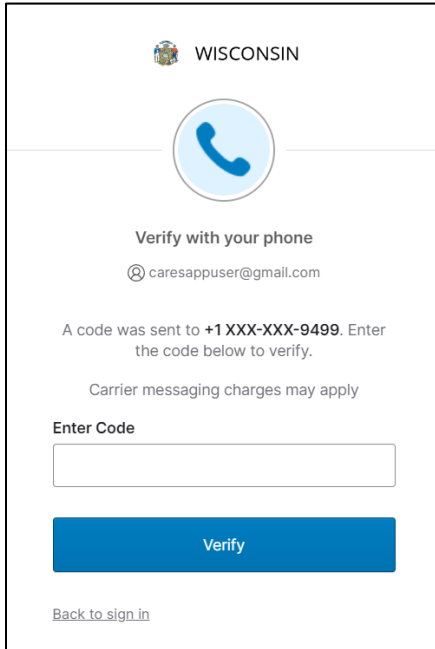
The screenshot shows the WISCONSIN login interface. At the top is the WISCONSIN logo. Below it is a circular icon with a blue padlock and four asterisks. The text "Verify with your password" is centered. Underneath is a greyed-out email field with a person icon. Below that is a "Password" label and a text input field with a toggle eye icon. A large blue "Verify" button is centered below the password field. At the bottom, there are two links: "Forgot password?" and "Back to sign in".

4. Select **Receive a code** (this will be based on the user's configured Multi-Factor Authentication method).



The screenshot shows the WISCONSIN login interface for phone verification. At the top is the WISCONSIN logo. Below it is a circular icon with a blue telephone handset. The text "Verify with your phone" is centered. Underneath is a greyed-out email field with a person icon and the text "caresappuser@gmail.com". Below that is the text "Send a code via SMS to +1 XXX-XXX-9499." followed by "Carrier messaging charges may apply". A large blue button labeled "Receive a code via SMS" is centered. At the bottom, there is a link: "Back to sign in".

5. Enter the code from the MFA method you choose and select **Verify**.

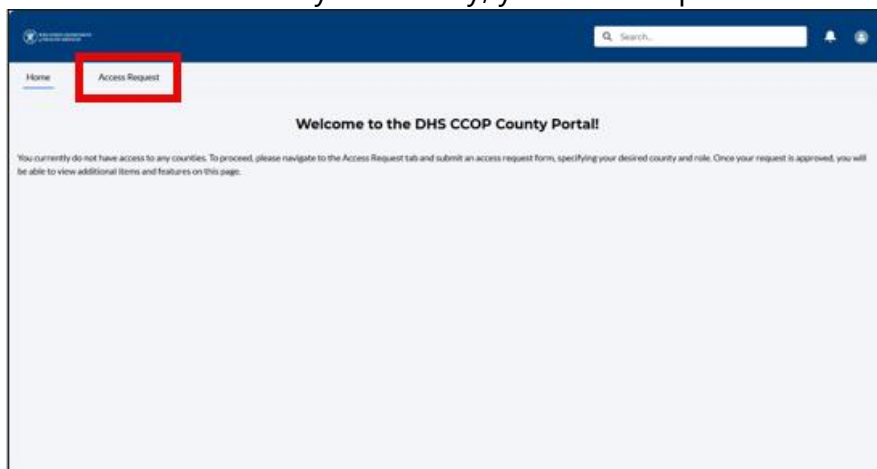


The image shows a mobile application interface for WISCONSIN. At the top is the WISCONSIN state logo and the word "WISCONSIN". Below this is a blue telephone handset icon inside a circle. The text "Verify with your phone" is displayed, followed by the email address "caresappuser@gmail.com". A message states: "A code was sent to +1 XXX-XXX-9499. Enter the code below to verify." Below this is a note: "Carrier messaging charges may apply". There is a label "Enter Code" above a white text input field. Below the input field is a blue button labeled "Verify". At the bottom left is a link that says "Back to sign in".

6. If the authentication is successful, you will be directed to the County Portal Home page.

2.3 Submitting an Access Request Form

When you log into the portal for the first time, you will see the following screen. To view information related to your county, you must request access to it.



1. On the Access Request page, click Request Access.

The screenshot shows the 'Access Request' page in a web application. At the top, there is a search bar and navigation links for 'Home' and 'Access Request'. Below the navigation bar, there is a 'Request Access' button highlighted with a red rectangular box. Underneath, there is a section titled 'Access Request Forms' with a filter set to 'All'. Below this, there is a table with columns: 'Access Request Form ...', 'Account', 'CCOP Role', 'Status', 'Created By', and 'Created Date'. The table is currently empty.

2. In the form, select the appropriate county, role, and program. Add any Requestor Comments, and click Submit to send your request.

The screenshot shows the 'CCOP County Admin/User Access Request Form'. The form has a title 'CCOP County Admin/User Access Request Form' and a red error message 'Please provide County and Role details*'. Below the error message, there are four dropdown menus: 'County' (with '--None--' selected), 'CCOP Role' (with '--None--' selected), 'Program' (with '--None--' selected), and 'Requestor Comments' (with a text area). At the bottom right of the form, there is a blue 'Submit' button. Below the form, there is a section titled 'Access Request Forms' with a filter set to 'All' and a table with columns: 'Access Request Form ...', 'Account', 'CCOP Role', 'Status', 'Created By', and 'Created Date'.

There are two roles to choose from: County Admin and County User. County Admins are approved by DHS and can authorize access requests for other county users in their county. County Users perform county-specific tasks and are approved by their local County Admin.

Role	Responsibilities	Approved By
County Admin	Authorize access requests for other county users in their county as well as perform county specific tasks	DHS
County User	Perform county specific tasks	Local County Admin

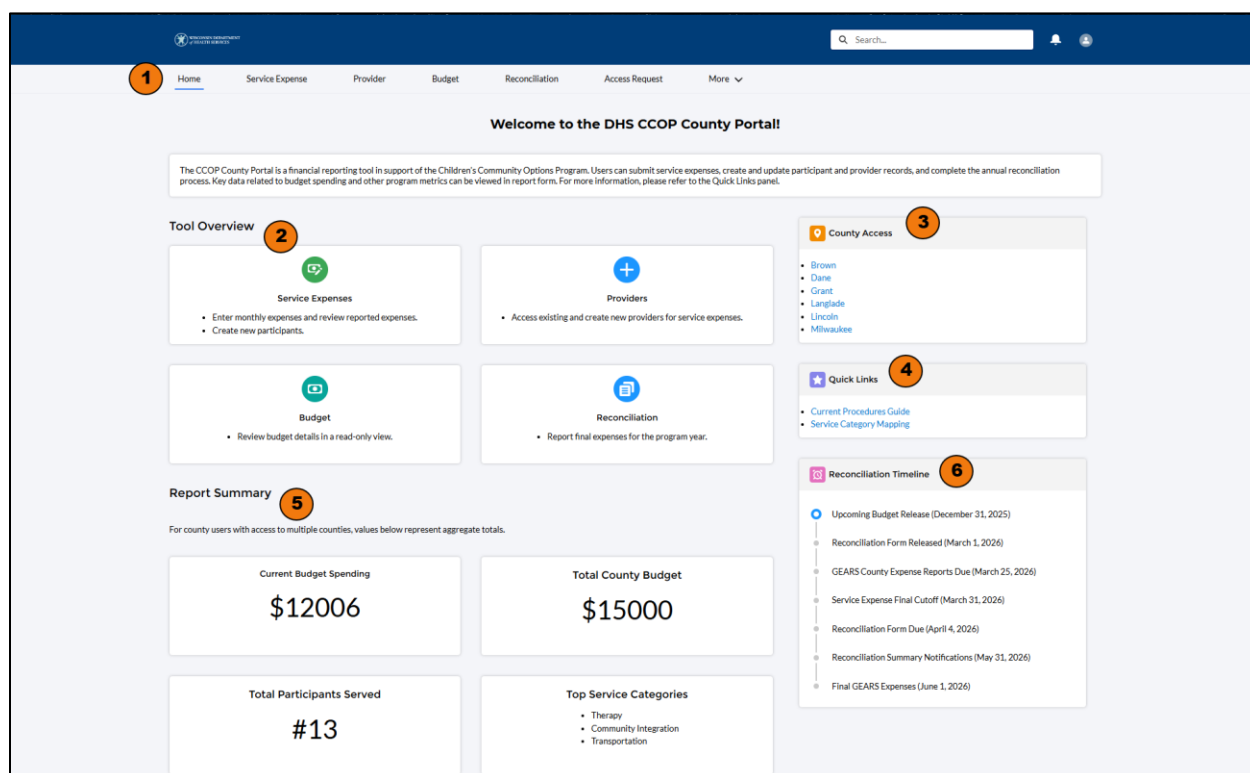
Before any other users can be approved, each county must first identify and request access for a County Admin.

After you submit your request, it will be reviewed for approval. Once a County Admin is approved, they can approve access requests for additional county users. You'll receive an email notification once your access has been approved. After receiving this notification, you can access the portal and view information related to your county.

3. Navigating the County Portal

The Home page serves as the central location for county users to monitor their CCOP activities. From here, you can access service expenses, providers, participants, budgets, reconciliation forms, and manage your access requests.

The navigation bar at the top of the screen contains the following pages: **Home, Service Expense, Provider, Budget, Reconciliation, Access Request, and More.** Click any menu item to navigate directly to that page.



1. **Navigation Bar** - The menu located at the top of the screen that provides access to various pages in the system.
2. **Tool Overview** - This section highlights core CCOP tasks such as tracking expenses, managing providers, viewing budgets, and completing reconciliations.

3. **County Access** – Offers quick links to a county's account page. The 'Related' tab displays a list of all records associated with that county that the user can access. Most users will have access to only one county.
4. **Quick Links** - Shortcuts to help docs and reference resources for common tasks.
5. **Report Summary** - Snapshot of key county metrics. Selecting any frame in this section will open its report record.
6. **Reconciliation Timeline** - Key dates for budget release, forms, cutoffs, and final reports to guide reconciliation milestones.

Additional details for County Access (#3):

The Related tab on a county record displays a list of all records associated with that county that the user can access. Most users will have access to only one county.

The screenshot shows the 'County Access' interface for 'County Dane'. The 'Related' tab is selected and highlighted with a red box. The interface displays several data tables:

- Budgets (3)**: A table with columns: Budget Name, Amount, Program, and Period Start Date.

Budget Name	Amount	Program	Period Start Date
Dane - CY 2025	\$130,000.00	CCOP	1/1/2025
Dane - CY2025 Y1	\$0.00	CCOP	1/1/2025
Dane - child	\$10.00	CCOP	1/1/2025
- Related Contacts (6)**: A table with columns: Contact Name, Account Name, Title, and Email.

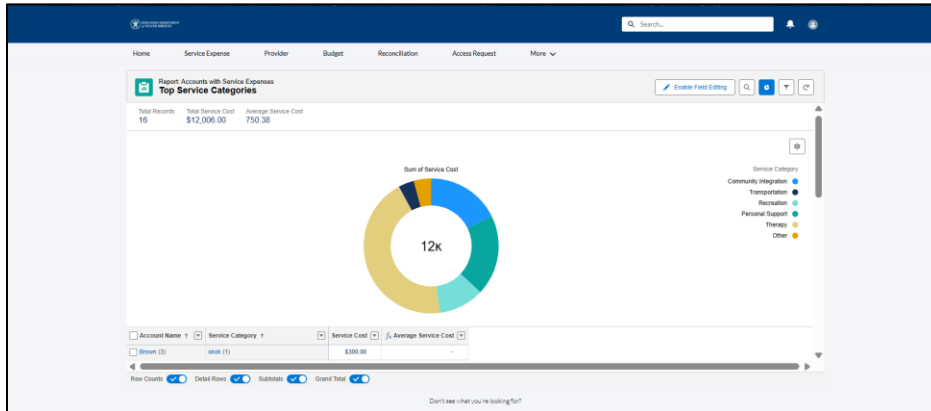
Contact Name	Account Name	Title	Email
Saikat Bhattacharya	Dane		sibhattacharya@deloitte.com
Y1 County User	Dane		youself@rahm@deloitte.com
ccop-napo	Dane		napocorp225@gmail.com
Peter Parker	Dane		marzahn@deloitte.com
Tony Stark	Grant		
Sunny Wane	Dane		grah@deloitte.com
- Service Expenses (6+)**: A table with columns: Service Expense, Participant, Budget, and Service Category.

Service Expense	Participant	Budget	Service Category
SE-000001	Harris, Andre		Community Integration
SE-000000	Cara Moran	Dane - CY 2025	Transportation
SE-000004	Neymar Jr		Transportation
SE-000006	Harris, Andre	Grant - CY 2025	Transportation
SE-000005	Harris, Andre		Support and Service Coordi...
SE-000013	Harris, Andre		Recreation
- Reconciliation (6+)**: A table with columns: Reconciliation Name, Assessment expenses, Care Plan Expenses, and Total CCOP TCM revenue.

Reconciliation Name	Assessment expenses	Care Plan Expenses	Total CCOP TCM revenue
Dane Item 17			\$0.00
Dane Item 14			\$0.00
Dane Item 04			\$0.00
Dane Item 12			\$0.00
Dane Item 10			\$0.00
Dane Item 03			\$0.00

Additional details for Report Summary (#5):

Selecting any frame in the Report Summary section will open the corresponding report record. In this example, opening a report displays both a chart and a table associated with that report.



3.1 Service Expense Page

The Service Expenses page displays documentation of services provided to children and their associated costs. County users can create new service expense records and track their submission status.

3.1.1 Service Expenses List Views

List views are lists of filtered records in a table format allowing users to view and manage data based on specific criteria. Use these to make finding records easier in categories.

The list view "pin" is a feature that allows you to quickly access your preferred list view. When you pin a list view (pin icon turned down), it saves your current view configuration so you can return to that list view when you leave the page.

Service Expenses

16 items • Sorted by Service Expense • Filtered by All service expenses • Updated a few seconds ago

Search this list...

	☐ Service Expense	Budget	Participant	Provider	Service Category	Service St...	Service En...	Service ...
1	☐ SE-000028		Emma Johnson		okok	10/4/2025	10/24/20...	\$300.00
2	☐ SE-000027				Recreation	10/20/20...	11/2/2025	\$967.00
3	☐ SE-000024	Grant - CY 2025		P-000...	Community Integration	10/23/20...	10/23/20...	\$123.00
4	☐ SE-000023		Neymar Jr	P-000...	Community Integration	10/24/20...	10/25/20...	\$1.00
5	☐ SE-000022	Grant - CY 2025		P-000...	Consumer and Family Directed ...	10/23/20...	10/23/20...	\$1.00
6	☐ SE-000017		Harris Andre	P-000...	Offsets	10/22/20...	10/22/20...	\$100.00
7	☐ SE-000013		Harris Andre	P-000...	Recreation	10/21/20...	12/30/20...	\$321.00
8	☐ SE-000012	Grant - CY 2025	Lara Eve Frazer	P-000...	Personal Support	10/21/20...	12/3/2025	\$2,323...
9	☐ SE-000010	Grant - CY 2025	Cara Moran	P-000...	Therapy	10/5/2025	10/30/20...	\$300.00
10	☐ SE-000006	Grant - CY 2025	Harris Andre	P-000...	Transportation	10/9/2025	10/9/2025	\$100.00
11	☐ SE-000005		Harris Andre	P-000...	Support and Service Coordinat...	10/9/2025	10/9/2025	\$100.00
12	☐ SE-000004		Neymar Jr	P-000...	Transportation	10/6/2025	10/7/2025	\$250.00
13	☐ SE-000003	Dane - CY 2025		P-000...	Therapy	6/18/2025	6/18/2025	\$1,000...
14	☐ SE-000002	Brown - CY 2025	Camille S Snow	P-000...	Therapy	1/13/2025	6/24/2025	\$4,000...
15	☐ SE-000001		Harris Andre	P-000...	Community Integration	8/5/2025	10/22/20...	\$2,000...
16	☐ SE-000000	Dane - CY 2025	Cara Moran	P-000...	Transportation	10/8/2025	10/15/20...	\$100.00

3.1.2 Creating a Service Expense – Selecting a Participant

1. On the Service Expenses page, click the **New** button.

Service Expenses

16 items • Sorted by Service Expense • Filtered by All service expenses • Updated a few seconds ago

Search this list...

	☐ Service Expense	Budget	Participant	Provider	Service Category	Service St...	Service En...	Service ...
1	☐ SE-000028		Emma Johnson		okok	10/4/2025	10/24/20...	\$300.00
2	☐ SE-000027				Recreation	10/20/20...	11/2/2025	\$967.00
3	☐ SE-000024	Grant - CY 2025		P-000...	Community Integration	10/23/20...	10/23/20...	\$123.00
4	☐ SE-000023		Neymar Jr	P-000...	Community Integration	10/24/20...	10/25/20...	\$1.00
5	☐ SE-000022	Grant - CY 2025		P-000...	Consumer and Family Directed ...	10/23/20...	10/23/20...	\$1.00
6	☐ SE-000017		Harris Andre	P-000...	Offsets	10/22/20...	10/22/20...	\$100.00
7	☐ SE-000013		Harris Andre	P-000...	Recreation	10/21/20...	12/30/20...	\$321.00
8	☐ SE-000012	Grant - CY 2025	Lara Eve Frazer	P-000...	Personal Support	10/21/20...	12/3/2025	\$2,323...
9	☐ SE-000010	Grant - CY 2025	Cara Moran	P-000...	Therapy	10/5/2025	10/30/20...	\$300.00
10	☐ SE-000006	Grant - CY 2025	Harris Andre	P-000...	Transportation	10/9/2025	10/9/2025	\$100.00
11	☐ SE-000005		Harris Andre	P-000...	Support and Service Coordinat...	10/9/2025	10/9/2025	\$100.00
12	☐ SE-000004		Neymar Jr	P-000...	Transportation	10/6/2025	10/7/2025	\$250.00
13	☐ SE-000003	Dane - CY 2025		P-000...	Therapy	6/18/2025	6/18/2025	\$1,000...
14	☐ SE-000002	Brown - CY 2025	Camille S Snow	P-000...	Therapy	1/13/2025	6/24/2025	\$4,000...
15	☐ SE-000001		Harris Andre	P-000...	Community Integration	8/5/2025	10/22/20...	\$2,000...
16	☐ SE-000000	Dane - CY 2025	Cara Moran	P-000...	Transportation	10/8/2025	10/15/20...	\$100.00

2. Enter the participant's first and last name and associated MCI ID, then click **Next**.

Select Participant

*First Name
 *Last Name
 *MCI ID

Next

Service Expenses
 All

23 items • Sorted by Service Expense • Filtered by All service expenses • Updated a few seconds ago

	Service Expense	Budget	Participant	Provider	Service Category	Service St...	Service En...	Service...
1	SE-000053	Brown - CY 2025		P-00005	Personal Support	11/14/20...	11/14/20...	\$300.00
2	SE-000054	Brown - CY 2025		P-00005	Personal Support	11/13/20...	11/13/20...	\$200.00
3	SE-000053	North Central ...		P-00002	Personal Support	11/12/20...	11/12/20...	\$200.00
4	SE-000052	Grant - CY 2025		P-00005	Personal Support	11/12/20...	11/12/20...	\$200.00
5	SE-000051	Grant - CY 2025		P-00000	Children's Foster Care	11/10/20...	11/10/20...	\$1.00

Once the participant is discovered in the system, select the radio button next to the participant's name and select **Choose Participant**.

Select Participant

First Name
 Last Name
 MCI ID

Choose Participant **Create New Participant**

Service Expenses
 All

27 items • Sorted by Participant • Filtered by All service expenses • Updated a few seconds ago

	Service Expense	Budget	Participant	Provider	Service Category	Service St...	Service En...	Service...
1	SE-000002	Brown - CY 2025		P-00003	Therapy	1/13/2025	6/24/2025	\$4,000.00
2	SE-000000	Dane - CY 2025		P-00002	Transportation	10/8/2025	10/15/20...	\$100.00
3	SE-000003	Dane - CY 2025		P-00002	Therapy	6/18/2025	6/18/2025	\$1,000.00
4	SE-000010	Grant - CY 2025		P-00000	Therapy	10/5/2025	10/30/20...	\$300.00
5	SE-000059	Brown - CY 2025		P-00006	Utilities	12/8/2025	12/31/20...	\$50.00
6	SE-000024	Grant - CY 2025		P-00000	Community Integration	10/23/20...	10/23/20...	\$122.00
7	SE-000021	Dane - CY 2025		P-00011	Child Care	10/27/20...	10/30/20...	\$122.00
8	SE-000028			P-00011	Child Care	10/4/2025	10/24/20...	\$300.00

Begin by selecting an existing provider. Then, choose the appropriate account (county) and service category from the dropdown menus. Input a service description, the start and end dates, and the service cost. **Note:** Service expense dates should be typed as 'mm/dd/yyyy' or selected using the calendar feature.

Service Expense

Participant: Holly Jay

* Provider: Search Providers by Name or Number...

* Service Description:

* Service End Date:

* Account: Search Accounts...

* Service Category: --None--

* Service Start Date:

* Service Cost:

Submit

Service Expenses

All ▾

23 items • Sorted by Service Expense • Filtered by All service expenses • Updated 10 minutes ago

	Service Expense	Budget	Participant	Provider	Service Category	Service St...	Service En...	Service...
1	☐ SE-000055	Brown - CY 2025		P-00005	Personal Support	11/14/20...	11/14/20...	\$300.00
2	☐ SE-000054	Brown - CY 2025	Holly Harris	P-00005	Personal Support	11/13/20...	11/13/20...	\$200.00
3	☐ SE-000053	North Central ...	Holly Jay	P-00002	Personal Support	11/12/20...	11/12/20...	\$200.00
4	☐ SE-000052	Grant - CY 2025	Harris Andre	P-00005	Personal Support	11/12/20...	11/12/20...	\$200.00

Click **Submit** to save the record and submit to DHS. Service expenses are submitted against your county's annual budget. Click 'Home' to navigate back to the main page.

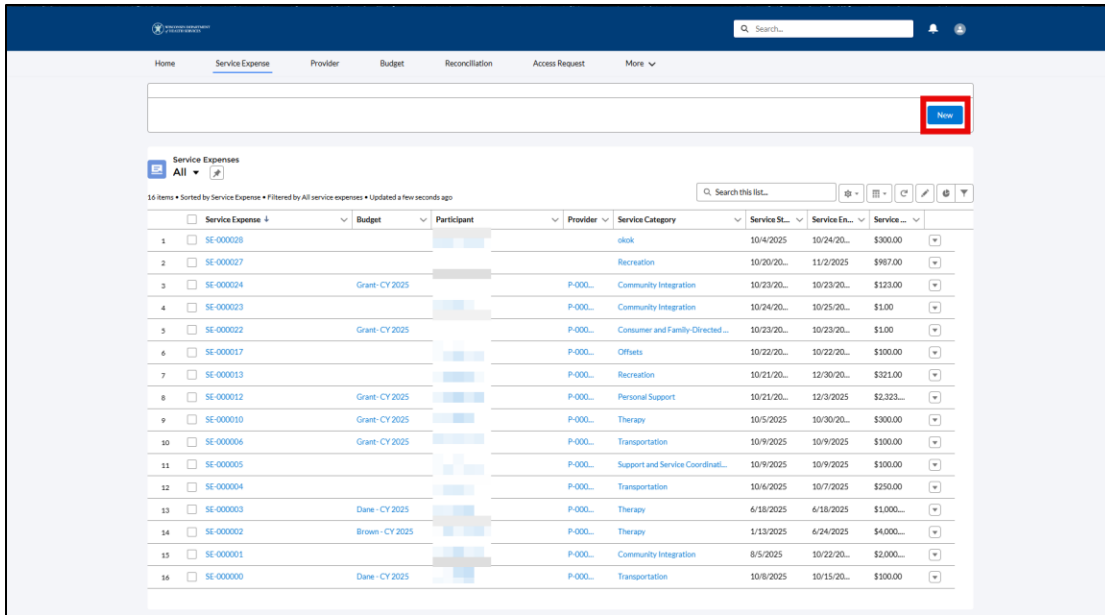
Service Expense
SE-000059

DETAILS RELATED

Service Expense SE-000059	Service Category Utilities
Participant Brown	Service Description Test
Account Brown	Service Cost \$50.00
Provider Brown - CY 2025	Service Start Date 12/8/2025
Budget Brown - CY 2025	Service End Date 12/31/2025
Created By Peter Parker, 12/5/2025, 9:18 AM	Last Modified By Peter Parker, 12/5/2025, 9:18 AM

3.1.3 Creating a Service Expense – Create New Participant

1. On the Service Expenses page, click the **New** button.



Service Expenses

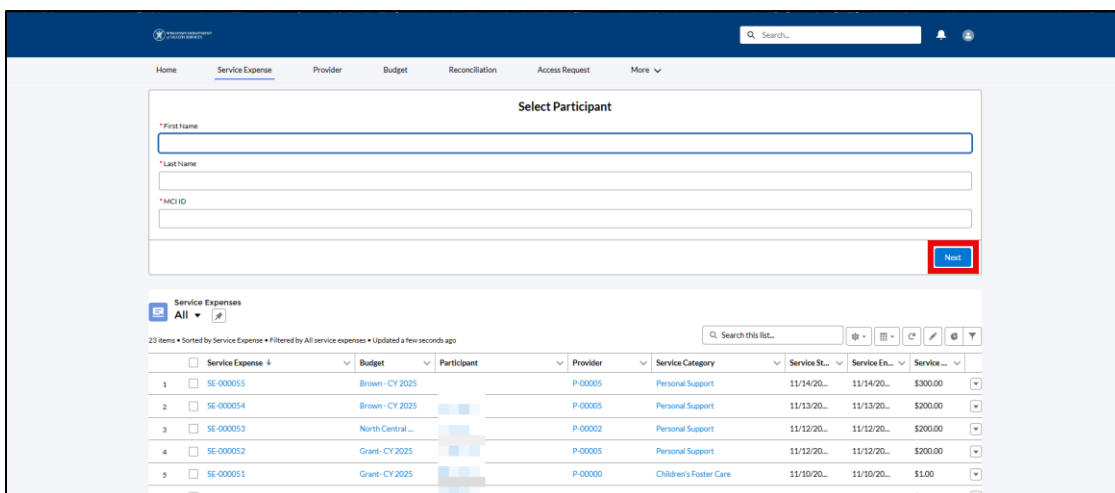
All ▾

16 items • Sorted by Service Expense • Filtered by All service expenses • Updated a few seconds ago

Search this list...

	Service Expense	Budget	Participant	Provider	Service Category	Service St...	Service En...	Service ...
1	SE-000028				click	10/4/2025	10/24/20...	\$300.00
2	SE-000027				Recreation	10/20/20...	11/2/2025	\$987.00
3	SE-000024	Grant-CY 2025		P-000...	Community Integration	10/23/20...	10/23/20...	\$123.00
4	SE-000023			P-000...	Community Integration	10/24/20...	10/25/20...	\$1.00
5	SE-000022	Grant-CY 2025		P-000...	Consumer and Family Directed ...	10/23/20...	10/23/20...	\$1.00
6	SE-000017			P-000...	Offsets	10/22/20...	10/22/20...	\$300.00
7	SE-000013			P-000...	Recreation	10/21/20...	12/30/20...	\$321.00
8	SE-000012	Grant-CY 2025		P-000...	Personal Support	10/21/20...	12/3/2025	\$2,323...
9	SE-000010	Grant-CY 2025		P-000...	Therapy	10/5/2025	10/30/20...	\$300.00
10	SE-000006	Grant-CY 2025		P-000...	Transportation	10/9/2025	10/9/2025	\$100.00
11	SE-000005			P-000...	Support and Service Coordinat...	10/9/2025	10/9/2025	\$300.00
12	SE-000004			P-000...	Transportation	10/6/2025	10/7/2025	\$250.00
13	SE-000003	Dane-CY 2025		P-000...	Therapy	6/18/2025	6/18/2025	\$1,000...
14	SE-000002	Brown-CY 2025		P-000...	Therapy	1/13/2025	6/24/2025	\$4,000...
15	SE-000001			P-000...	Community Integration	8/5/2025	10/22/20...	\$2,000...
16	SE-000000	Dane-CY 2025		P-000...	Transportation	10/8/2025	10/15/20...	\$300.00

2. Enter the participant's first and last name and associated MCI ID. If the individual is a new participant, continue to click **Next**.



Select Participant

* First Name

* Last Name

* MCI ID

Next

Service Expenses

All ▾

23 items • Sorted by Service Expense • Filtered by All service expenses • Updated a few seconds ago

Search this list...

	Service Expense	Budget	Participant	Provider	Service Category	Service St...	Service En...	Service ...
1	SE-000055	Brown-CY 2025		P-00005	Personal Support	11/14/20...	11/14/20...	\$300.00
2	SE-000054	Brown-CY 2025		P-00005	Personal Support	11/13/20...	11/13/20...	\$200.00
3	SE-000053	North Central ...		P-00002	Personal Support	11/12/20...	11/12/20...	\$200.00
4	SE-000052	Grant-CY 2025		P-00005	Personal Support	11/12/20...	11/12/20...	\$200.00
5	SE-000051	Grant-CY 2025		P-00000	Children's Foster Care	11/10/20...	11/10/20...	\$1.00
6	SE-000050	Brown-CY 2025		P-00000	Recreation	11/10/20...	11/10/20...	\$1.00

3. The system will acknowledge there are no records for the newly typed in data and prompt the user to create the participant record. Click **Create New Participant**.

Home Service Expense Provider Budget Reconciliation Access Request More ▾

Search...

Select Participant

No results found.

Choose Participant Create New Participant

Service Expenses

All ▾

23 items • Sorted by Service Expense • Filtered by All service expenses • Updated 2 minutes ago

Search this list...

	Service Expense	Budget	Participant	Provider	Service Category	Service St...	Service En...	Service ...
1	☐ SE-000055	Brown - CY 2025	Holly Harris	P-00005	Personal Support	11/14/20...	11/14/20...	\$300.00
2	☐ SE-000054	Brown - CY 2025	Holly Harris	P-00005	Personal Support	11/13/20...	11/13/20...	\$200.00
3	☐ SE-000053	North Central...	Holly Jay	P-00002	Personal Support	11/12/20...	11/12/20...	\$200.00
4	☐ SE-000052	Grant - CY 2025	Harris Andre	P-00005	Personal Support	11/12/20...	11/12/20...	\$200.00
5	☐ SE-000051	Grant - CY 2025	Neymar Jr	P-00000	Children's Foster Care	11/10/20...	11/10/20...	\$1.00
6	☐ SE-000050	Brown - CY 2025	Neymar Jr	P-00000	Recreation	11/10/20...	11/10/20...	\$1.00
7	☐ SE-000049	Brown - CY 2025	Neymar Jr	P-00000	Respite	11/10/20...	11/10/20...	\$1.00
8	☐ SE-000028		Emma Johnson		skok	10/4/2025	10/24/20...	\$300.00
9	☐ SE-000027				Recreation	10/20/20...	11/2/2025	\$987.00

4. Fill out the participant fields and click **Next**.

Home Service Expense Provider Budget Reconciliation Access Request More ▾

Search...

Add New Participant

*MCI ID

*First Name

Middle Name

*Last Name

Suffix

SSN

*Gender

*Birthdate

*Hispanic/Latino

*Race

*Level of Care

Living Arrangement

CLTS Status

Medicaid enrolled?

Next

The system will return the user back to the Service Expense edit page with the new participant highlighted in the left-hand corner.

Home Service Expense Provider Budget Reconciliation Access Request More ▾

Search...

Service Expense

Participant: Billy West

*Account

*Provider

*Service Category

*Service Description

*Service Start Date

*Service End Date

*Service Cost

Submit

Service Expenses

All ▾

27 items • Sorted by Participant • Filtered by All service expenses • Updated 2 minutes ago

Search this list...

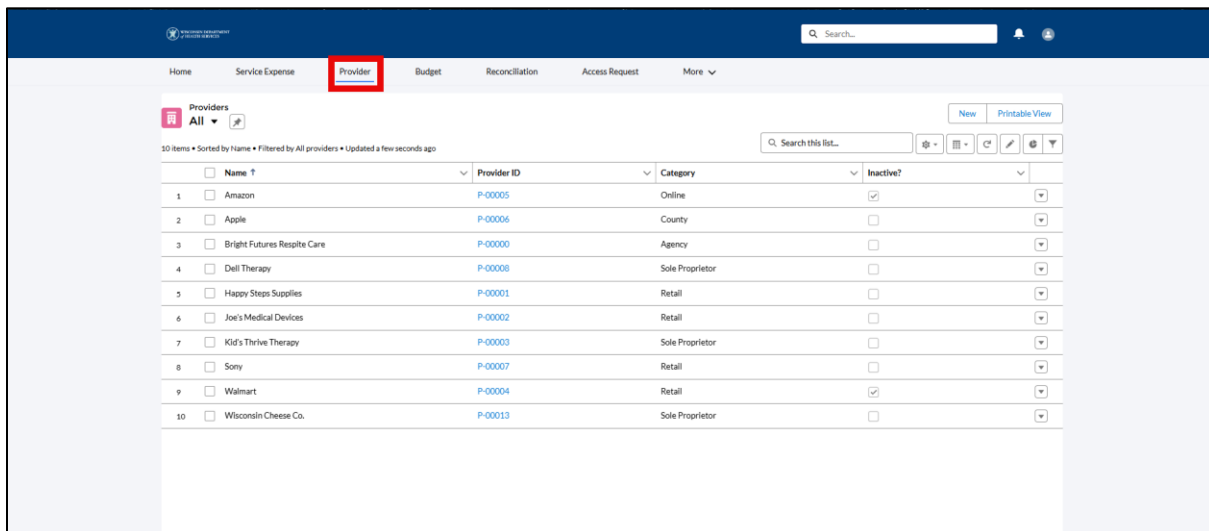
	Service Expense	Budget	Participant	Provider	Service Category	Service St...	Service En...	Service ...
1	☐ SE-000002	Brown - CY 2025	Camille S Snow	P-00003	Therapy	1/13/2025	6/24/2025	\$4,000.00
2	☐ SE-000000	Dane - CY 2025	Cara Moran	P-00002	Transportation	10/8/2025	10/15/20...	\$100.00
3	☐ SE-000003	Dane - CY 2025	Cara Moran	P-00002	Therapy	6/18/2025	6/18/2025	\$1,000.00
4	☐ SE-000010	Grant - CY 2025	Cara Moran	P-00000	Therapy	10/5/2025	10/30/20...	\$300.00

5. Continue with creating the Service Expense record by choosing the appropriate account (county) and service category from the dropdown menus. Input a service description, the start and end dates, and the service cost. **Note:** Service expense dates should be typed as 'mm/dd/yyyy' or selected using the calendar feature.

6. Click **Submit** to save the record and submit it to DHS. Click 'Home' to navigate back to the main page.

3.2 Provider Page

The Provider page displays all service providers entered by county users. You can view existing providers and create new provider records as needed.



The screenshot shows the 'Provider' page of a web application. The top navigation bar includes 'Home', 'Service Expense', 'Provider' (highlighted), 'Budget', 'Reconciliation', 'Access Request', and 'More'. Below the navigation bar, there is a search bar and a 'New' button. The main content area displays a table of providers. The table has columns for 'Name', 'Provider ID', 'Category', and 'Inactive?'. There are 10 items listed, each with a checkbox in the 'Name' column and a dropdown arrow in the 'Inactive?' column.

	Name	Provider ID	Category	Inactive?
1	☐ Amazon	P-00005	Online	☒
2	☐ Apple	P-00006	County	☐
3	☐ Bright Futures Respite Care	P-00000	Agency	☐
4	☐ Dell Therapy	P-00008	Sole Proprietor	☐
5	☐ Happy Steps Supplies	P-00001	Retail	☐
6	☐ Joe's Medical Devices	P-00002	Retail	☐
7	☐ Kid's Thrive Therapy	P-00003	Sole Proprietor	☐
8	☐ Sony	P-00007	Retail	☐
9	☐ Walmart	P-00004	Retail	☒
10	☐ Wisconsin Cheese Co.	P-00013	Sole Proprietor	☐

3.2.1 Creating a Provider Record

To create a new provider, click the **New** button on the Provider page.

Providers

All ▾

10 Items • Sorted by Name • Filtered by All providers • Updated a few seconds ago

Search this list...

	Name ↑	Provider ID	Category	Inactive?	
1	☐ Amazon	P-00005	Online	☒	▾
2	☐ Apple	P-00006	County	☐	▾
3	☐ Bright Futures Respite Care	P-00000	Agency	☐	▾
4	☐ Dell Therapy	P-00008	Sole Proprietor	☐	▾
5	☐ Happy Steps Supplies	P-00001	Retail	☐	▾
6	☐ Joe's Medical Devices	P-00002	Retail	☐	▾
7	☐ Kid's Thrive Therapy	P-00003	Sole Proprietor	☐	▾
8	☐ Sony	P-00007	Retail	☐	▾
9	☐ Walmart	P-00004	Retail	☒	▾
10	☐ Wisconsin Cheese Co.	P-00013	Sole Proprietor	☐	▾

New Printable View

Fill in all the required information about the provider and click **Save** to save the record. Once the provider has been created, it will be available for selection when creating service expenses.

New Provider

* - Required Information

Information

Provider ID

Inactive? ☐

* Name

Website

Complete this field.

* Category

Email

TIN

Phone Number

Physical Address (Street)

Mailing Address (Street)

Physical Address (City)

Mailing Address (City)

Physical Address (State/Province)

Mailing Address (State/Province)

Physical Address (ZIP/Postal Code)

Mailing Address (ZIP/Postal Code)

Physical Address (Country/Territory)

Cancel Save & New **Save**

Note: A provider can also be created during the Service Expense process.

3.3 Budget Page

The Budget page displays each county's annual budget allocation. Budgets are released once a year by DHS administrators and determine how much funding is available for program expenses.

County users can view their current budget, see how much has been spent, and track remaining funds. All service expenses are created against the annual budget.

To view budget records, choose any record link under the **Budget Name** column.

Budget Name	Description	Period Name	Period Start Date	Period End Date	Type	Status
1 Unified Budget	asfa		1/1/2025	12/31/2025		Active
2 Unified 2025	Unified - Lincoln, Langlade 2025		1/1/2025	12/31/2025		Active
3 North Central Healthcare (NCHC) 2025	Consortia Budget		1/1/2025	12/31/2025		Active
4 Lincoln CY2025	2025		1/1/2025	12/31/2025		Active
5 Lincoln 2025	Unified - Lincoln		1/1/2025	12/31/2025		Active
6 Langlade CY2025	2025		1/1/2025	12/31/2025		Active
7 Langlade 2025	Unified - Langlade 2025		1/1/2025	12/31/2025		Active
8 Grant- CY 2025	Grant county budget 2025		1/1/2025	12/31/2025		Active
9 Dane parent	test		1/1/2025	12/31/2025		Active
10 Dane CY2025 YI	2025		1/1/2025	12/31/2025		Active
11 Dane child	test		1/1/2025	12/31/2025		Active
12 Dane - CY 2025	Dane county budget 2025		1/1/2025	12/31/2025		Active
13 Brown - CY 2025	Brown county budget 2025		1/1/2025	12/31/2025		Active
14 Brown - CY 2025	Brown county budget 2025		1/1/2024	12/31/2024		Active

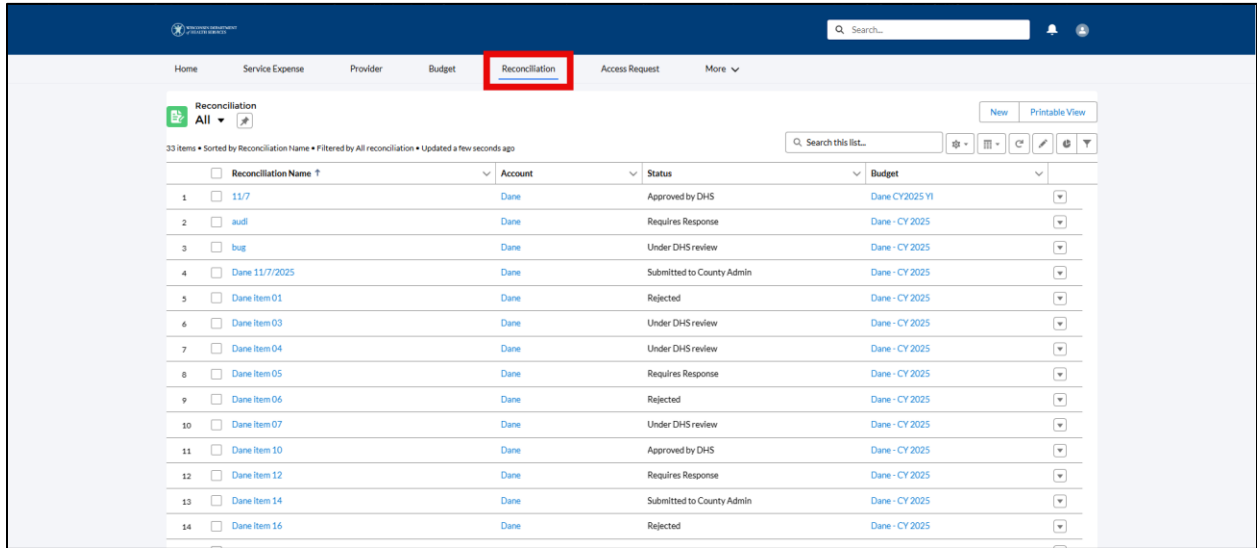
Here's an example of what a budget record looks like.

Parent Budget	Period Name	Period Start Date	Period End Date	Description	Amount
		1/1/2025	12/31/2025	Dane county budget 2025	\$110,000.00

DETAILS	
Budget	Status: Active
Budget Name: Dane - CY 2025	Description: Dane county budget 2025
Account: CCOP	Created By: 10/9/2025 9:57 AM
Program: CCOP	Created Date: 10/9/2025 9:57 AM
Amount: \$110,000.00	Last Modified By: 11/7/2025 9:34 AM
Unified Amount: \$110,000.00	Last Modified Date: 11/7/2025 9:34 AM
Period Start Date: 1/1/2025	Budget Actual: \$100,000.00
Period End Date: 12/31/2025	Parent Budget:
Sub A Allocation: Assessments and Plans	
Base Sub A Allocation: \$1,650.00	Unobligated carryforward: \$0.00
Assessment and planning carryforward: \$0.00	Total Sub A Allocation: \$1,650.00
Sub B Allocation: CCOP Services	
Base Sub B Allocation: \$88,350.00	CCOP service carryforward: \$4,000.00
Unobligated carryforward: \$0.00	CCOP admin carryforward: \$0.00
	Total Sub B Allocation: \$92,350.00
Totals	
Total Base Allocation: \$90,000.00	Total Budget: \$94,700.00
Total carryforward: \$4,000.00	
Risk and Administrative Limits	
Risk Reserve Maximum: \$13,350.00	Admin Reimbursement Maximum: \$4,196.50
Risk Reserve Deposit: \$10,000.00	Carryforward Maximum: \$4,000.00

3.4 Reconciliation Page

The Reconciliation page is where the annual reconciliation process takes place. Below is the list view of existing reconciliation records under the Reconciliation tab.



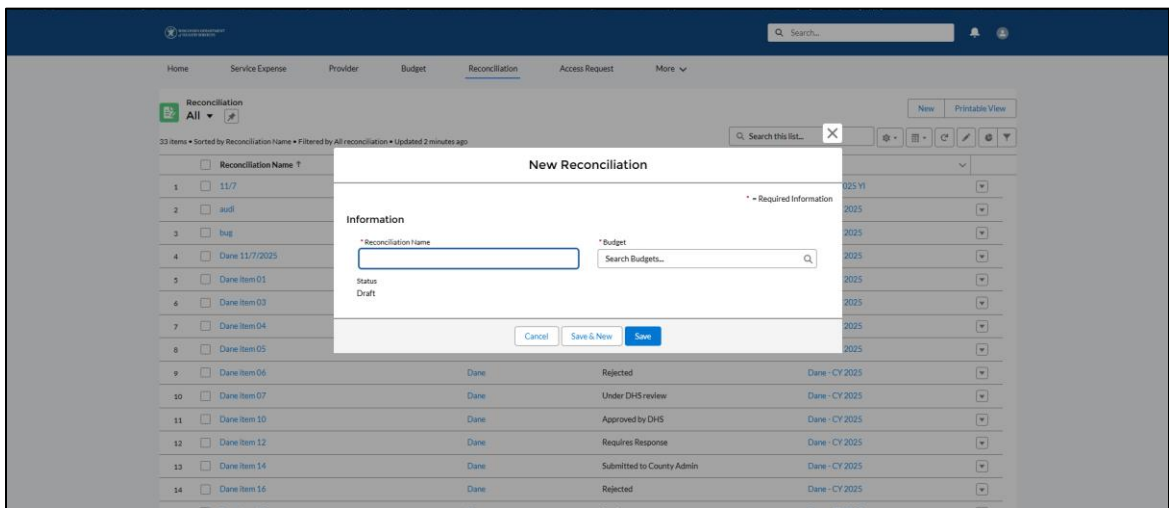
	Reconciliation Name	Account	Status	Budget
1	11/7	Dane	Approved by DHS	Dane - CY 2025 Y1
2	audi	Dane	Requires Response	Dane - CY 2025
3	bug	Dane	Under DHS review	Dane - CY 2025
4	Dane 11/7/2025	Dane	Submitted to County Admin	Dane - CY 2025
5	Dane Item 01	Dane	Rejected	Dane - CY 2025
6	Dane Item 03	Dane	Under DHS review	Dane - CY 2025
7	Dane Item 04	Dane	Under DHS review	Dane - CY 2025
8	Dane Item 05	Dane	Requires Response	Dane - CY 2025
9	Dane Item 06	Dane	Rejected	Dane - CY 2025
10	Dane Item 07	Dane	Under DHS review	Dane - CY 2025
11	Dane Item 10	Dane	Approved by DHS	Dane - CY 2025
12	Dane Item 12	Dane	Requires Response	Dane - CY 2025
13	Dane Item 14	Dane	Submitted to County Admin	Dane - CY 2025
14	Dane Item 16	Dane	Rejected	Dane - CY 2025

3.4.1 Working with Reconciliation Forms

County users can prepare reconciliation forms but **cannot** submit them to DHS. Only county admins can send reconciliation forms to DHS for review.

To work on a reconciliation form:

1. Navigate to the Reconciliation page
2. Name the reconciliation and add the relevant budget year by searching in the Budget field



New Reconciliation

* - Required Information

Information

*Reconciliation Name

*Budget

Status
Draft

Important: The system controls when users can access specific budget records for reconciliation.

- **Administrative Control** – DHS admins control when users can access certain budget records on the back end.
- **Budget-Year Alignment** – Budget records are tied to the calendar year. When creating a reconciliation record, the budget selection field will only display budgets that are currently available for reconciliation.
- **Reconciliation Timing** – Reconciliation takes place in the first quarter of the year (March-April timeframe) for the previous calendar year.

Example: If you're reconciling for the 2024 calendar year, this would typically occur in March or April of 2025. The system prevents scenarios where reconciliation would happen at inappropriate times (such as reconciling for 2024 in September 2024).

3.4.2 Reconciliation Form Tab

Fill in all required information comparing budgeted amounts to actual expenses in the Reconciliation Form Tab. Enter values in required fields or select "Accept Default Value" to complete the field.

The screenshot displays the 'Reconciliation Form' tab within a web application. The interface includes a top navigation bar with links for Home, Service Expense, Provider, Budget, Reconciliation, Access Request, and More. A search bar is located on the right side of the top bar. The main content area is divided into a left sidebar and a right main panel. The sidebar contains a 'Reconciliation Form' tab (highlighted with a red box) and a list of categories: CCOP Utilization, Risk Reserve (RR) Activity, Administrative Expenses, Summary, and Contact Information and Certification. The main panel shows the 'CCOP Utilization' section, which includes a 'Reconciled Year' dropdown menu. Below this, there are two sections: 'CCOP Assessments and Plans' and 'CCOP Services'. Each section contains a text input field with a default value of '\$0.00' and an 'Accept Default Value' button. The 'CCOP Assessments and Plans' section also includes a label '* Assessment and Plan Expenses' and the 'CCOP Services' section includes a label '* Straight CCOP Service Expenses'.

Progress Tracking

The Reconciliation Form tab includes progress indicators that show completion status for the individual sections and the overall form.

The screenshot displays the 'Reconciliation Form' tab in a web application. The interface includes a top navigation bar with links to Home, Service Expense, Provider, Budget, Reconciliation, Access Request, and More. Below this, a sub-navigation bar shows 'Reconciliation Form', 'Details', and 'Review'. The main content area is divided into two panels. The left panel, titled 'Reconciliation Form', contains a list of sections: 'Reconciled Fields' (with a toggle switch and a progress bar), 'CCOP Utilization', 'Risk Reserve (RR) Activity', 'Administrative Expenses', 'Summary' (highlighted), and 'Contact Information and Certification'. The right panel, titled 'Risk Reserve (RR) Summary', displays a detailed breakdown of risk reserve deposits and withdrawals, including amounts for CCOP risk reserve deposits, withdrawals applied to CCOP assessments and plans, CCOP risk reserve withdrawals applied to CCOP services, CCOP risk reserve withdrawals applied to non-federal match to Children's Long Term Support (CLTS) services, CCOP risk reserve withdrawals for reconciled year administrative expenses, Net CCOP risk reserve deposit (withdrawal), Starting CCOP risk reserve balance, Risk reserve interest, and Processed risk reserve deposits (withdrawals).

Reconciliation Form Features

- **Expandable Sections** – The lefthand panel can expand or hide the form section menu. Individual sections can be expanded or collapsed, allowing you to focus on the section you're currently working on.

This screenshot shows the 'Reconciliation Form' tab with the 'Summary' section expanded. The left panel lists the sections: 'Reconciled Fields', 'CCOP Utilization', 'Risk Reserve (RR) Activity', 'Administrative Expenses', 'Summary' (expanded), and 'Contact Information and Certification'. The right panel displays the 'Summary' section, which includes a 'Risk Reserve (RR) Summary' and a 'CCOP Summary'. The 'Risk Reserve (RR) Summary' section is expanded, showing a list of items: 'Risk Reserve (RR) Summary', 'CCOP Administrative Expenses', and 'CCOP Summary'. The 'CCOP Summary' section is also expanded, showing a list of items: 'CCOP Summary', 'CCOP Administrative Expenses', and 'CCOP Summary'.

The screenshot shows the 'Reconciliation Form' with the 'Risk Reserve (RR) Summary' section active. The form includes fields for CCOP risk reserve deposits, withdrawals, and balances, all of which are currently grayed out. A red box highlights the 'RR' tab in the left sidebar.

- **Save as Draft** – Save your work in progress as a draft. You must save each section as a draft before moving to the next section. If you try to navigate away without saving, the system will notify you of unsaved data and require you to save before proceeding.

The screenshot shows the 'Reconciliation Form' with the 'CCOP Utilization' section active. The form includes fields for CCOP Assessments and Plans, CCOP Services, Children's Long-Term Support (CLTS) Program Match, and CCOP Target Case Management (TCM) Revenue. A red box highlights the 'Save as Draft' button at the bottom right.

Calculated Fields

Some fields in the reconciliation form are automatically calculated and appear grayed out. Calculated fields update in two ways:

1. **Immediate calculation:** Some fields update automatically as soon as you enter a value in a related field.

Examples:

- Starting CCOP risk reserve balance
- Reported unreimbursed and unrequested from CCOP administrative costs

2. **Calculation on save:** Other fields update only after "Save as Draft" is selected.

Examples:

- Pending prior year CCOP risk reserve

- Ending CCOP risk reserve balance

The screenshot displays the 'Reconciliation Form' interface. On the left, a sidebar lists sections: Summary, Contact Information and Certification, CCOP Utilization, Risk Reserve (RR) Activity, and Administrative Expenses. The 'Summary' section is currently selected. The main content area shows the 'Risk Reserve (RR) Summary' section, which is highlighted with a red border. This section contains a table with the following data:

Risk Reserve (RR) Summary	
CCOP risk reserve deposits funded by the reconciled year's CCOP allocation	\$10.00
CCOP risk reserve withdrawals applied to reconciled year CCOP assessments and plans	\$20.00
CCOP risk reserve withdrawals applied to reconciled year CCOP services	\$0.00
CCOP risk reserve withdrawals applied to reconciled year non-federal match to Children's Long Term Support (CLTS) services	\$0.00
CCOP risk reserve withdrawals for reconciled year administrative expenses	-\$110.00
Net CCOP risk reserve deposit (withdrawal)	-\$80.00
Starting CCOP risk reserve balance	\$10.00
Risk reserve interest	\$10.00
Processed risk reserve deposits (withdrawals)	

Conditional Questions

Certain fields may appear based on your answers to conditional questions, such as whether your county maintains a risk reserve.

In the last section, Contact Information and Certification, click **Submit** to save and submit your work.

The screenshot shows the 'Contact Information and Certification' section of the form, which is highlighted with a red border. The section is divided into three main parts: Contact Information, Secondary CCOP Fiscal Contact, and Certification. The 'Contact Information' part includes fields for Phone Number, Email Address, City, and Zip Code. The 'Secondary CCOP Fiscal Contact' part includes fields for Last Name, First Name, Phone Number, Email Address, Title/Position, Street Address, City, and Zip Code. The 'Certification' part includes fields for Name, CWA Approval Date (set to Nov 3, 2025), and Title/Position. A red box highlights the 'Submit' button at the bottom right of the form.

Once a county user submits a form, the county admin will be notified and review the form. County admins can approve or reject. When a county admin approves and submits the reconciliation form, DHS will review and either approve or reject it. County admins and DHS may add comments requesting clarification once a form is rejected.

Comments can be found using the Comment & History button inside of the reconciliation form. See section 3.4.3 County Admin Review Process.

The screenshot shows the 'Reconciliation Form' in the 'Review' tab. The 'Risk Reserve (RR) Summary' section is expanded, displaying various risk reserve items and their values. A red box highlights the 'Comments & History' button in the top right corner of the form.

Item	Value
CCOP risk reserve deposits funded by the reconciled year's CCOP allocation	\$0.00
CCOP risk reserve withdrawals applied to reconciled year CCOP assessments and plans	\$0.00
CCOP risk reserve withdrawals applied to reconciled year CCOP services	\$0.00
CCOP risk reserve withdrawals applied to reconciled year non-federal match to Children's Long Term Support (CLTS) services	\$0.00
CCOP risk reserve withdrawals for reconciled year administrative expenses	\$0.00
Net CCOP risk reserve deposit (withdrawal)	\$0.00
Starting CCOP risk reserve balance	
Risk reserve interest	
Processed risk reserve deposits (withdrawals)	

Details Tab

The Details tab can be checked for additional information related to the reconciliation form including the record status; whether it has been **Approved by DHS, Rejected, Submitted to the County Admin, Under DHS review, or Requires Response**. When the record is saved or submitted, it will be found under the Reconciliation Page list view.

The screenshot shows the 'Reconciliation Form' in the 'Details' tab. The 'Reconciliation Dane Item 01' record is displayed, showing various fields and their values. A red box highlights the 'Details' tab in the top navigation bar.

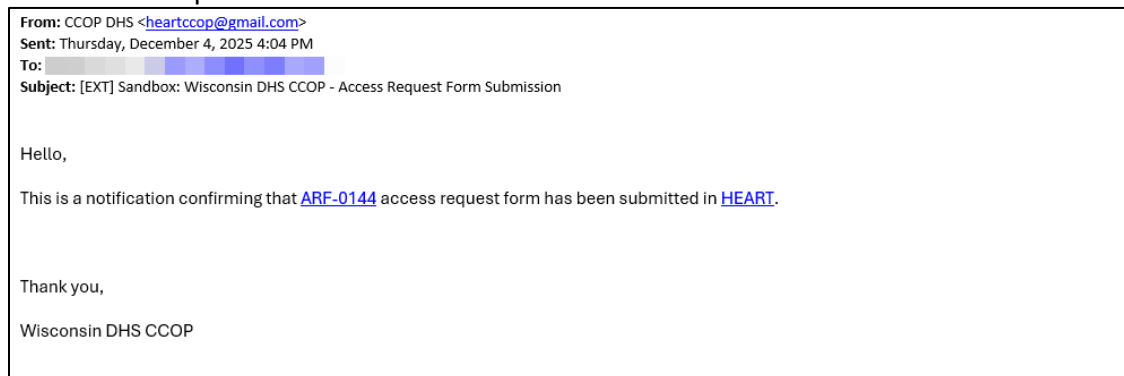
Field	Value
Reconciliation name	Dane Item 01
Status	Rejected
Created By	.11/3/2025, 1:25 PM
Budget	Dane - CY 2025
Last Modified By	.11/4/2025, 12:23 PM

3.4.3 County Admin Review Process

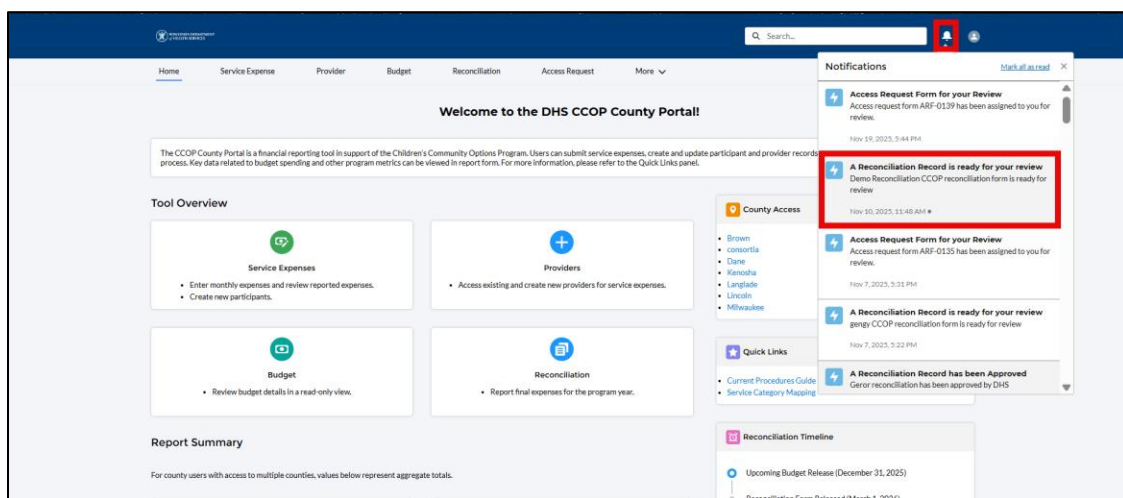
After a county user submits a reconciliation form, it enters review with the county admin.

Notifications

- The county admin receives both an email notification and a portal notification indicating that a reconciliation form is ready for review. Here is an example of the email template:



- The portal notification appears in the system (bell icon) and includes details about the submitted record
- Clicking the notification directs the admin to the reconciliation record



Alternatively, a county admin can look for the reconciliation record under "Submitted to County Admin" status in the Reconciliation list view to begin reviewing it.

Review Steps

1. County admins review all tabs of the submitted form
2. They look through and verify what the county user has input
3. On the Review tab, they provide the review decision

The screenshot shows the 'Reconciliation Form' in the 'Review' tab. The 'Reconciliation Form' tab is highlighted in the top navigation bar. The form is divided into two main sections: 'Summary' and 'Risk Reserve (RR) Summary'. The 'Summary' section includes 'Contact Information and Certification' and 'Administrative Expenses'. The 'Risk Reserve (RR) Summary' section includes 'CCOP Utilization', 'Risk Reserve (RR) Activity', and 'Administrative Expenses'. The 'Risk Reserve (RR) Summary' section also includes a table with columns for 'Risk Reserve (RR) Summary' and 'Amount'. The table lists various items and their corresponding amounts, such as 'CCOP risk reserve deposits funded by the reconciled year's CCOP allocation' and 'CCOP risk reserve withdrawals applied to reconciled year CCOP assessments and plans'.

Review Decisions

County admins have two options:

- **Approve** - Sends the form to the DHS admin approval queue. Status changes from "Submitted" to "Under DHS Review" in the Reconciliation record.
- **Reject** - Returns the form to the county user for corrections. Status changes from "Submitted" to "Rejected" in the Reconciliation record. Rejection is appropriate when:
 - There is new content that needs to be updated
 - There is inaccurate information throughout the form

The screenshot shows the 'Reconciliation Form' in the 'Review' tab. The 'Review' tab is highlighted in the top navigation bar. The form is divided into two main sections: 'Work Guide' and 'Review Decision'. The 'Review Decision' section includes a 'Review Decision' label and two radio buttons: 'Approve' and 'Reject'. The 'Approve' radio button is selected. The 'Finish' button is located at the bottom right of the form.

Select **Finish** to confirm the status of the form. The county user that submitted the reconciliation form will get an email notification that lets them know if their form has been approved or rejected. Here is an example of the email template:

From: CCOP DHS <heartccop@gmail.com>
Sent: Thursday, December 4, 2025 4:04 PM
To: [REDACTED]
Subject: [EXT] Sandbox: Wisconsin DHS CCOP - Reconciliation Form CY1340 Available

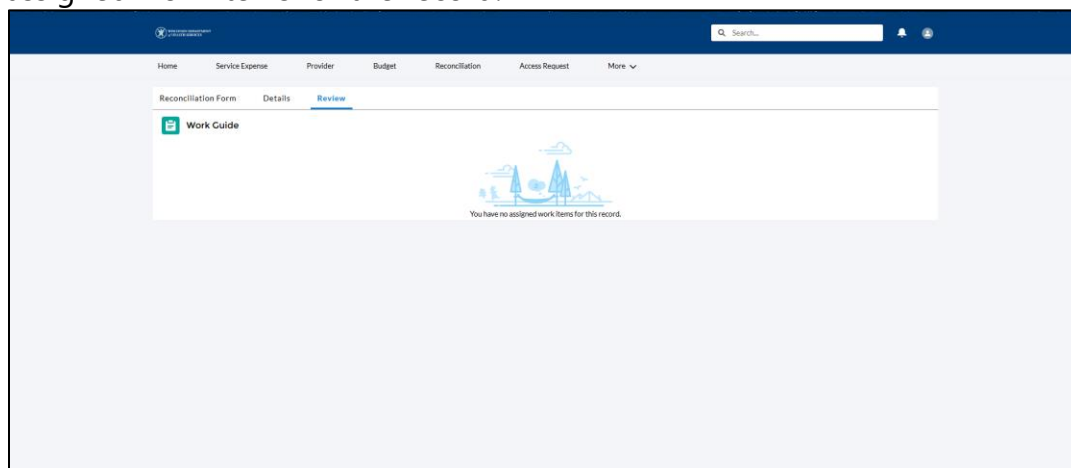
Hello,

The CCOP reconciliation form for CY1340 is now available. To complete your form, please log in to [HEART](#) and complete the reconciliation process.

Thank you,

Wisconsin DHS CCOP

Note: When a reconciliation form is approved or rejected, the work guide has no assigned work items for the record.



3.4.4 Adding Comments as County Admins

County admins can add comments for specific fields when rejecting a form. For example, if there's an issue with a particular field, they can leave a comment explaining the issue to the county user.

1. Start adding comments by clicking the comment icon next to the field you want to comment on.

The screenshot shows the 'Reconciliation Form' interface with tabs for 'Details' and 'Review'. The 'Review' tab is active, displaying a 'Risk Reserve (RR) Summary' section. On the left, a sidebar lists various reconciliation items: 'CCOP Utilization', 'Risk Reserve (RR) Activity', 'Administrative Expenses', 'Summary', and 'Contact Information and Certification'. The 'Summary' section is expanded, showing a list of items with their respective values. A red box highlights the comment icon (a speech bubble) next to the 'CCOP risk reserve withdrawals applied to reconciled year CCOP assessments and plans' field. A 'View comments and history for this item.' button is also visible next to this field.

2. Select **Add Comment**.

The screenshot shows the 'Activity History' modal window, which is a list of recent activities. The modal has a search bar and filters for 'Show History' and 'Show Comments'. The activities are listed with their status changes and timestamps. A red box highlights the 'Add Comment' button at the bottom right of the modal. The background shows the 'Reconciliation Form' interface with the 'Risk Reserve (RR) Summary' section visible.

3. Click **Post Comment** to save comment.

3.5 Access Request Page



Health & Human Services

Health & Human Services




Home

Service Expense

Provider

Budget

Reconciliation

Access Request

More

Request Access

Access Request Forms

All

50+ Items

Sorted by Access Request Form Name

Filtered by All access request forms

Updated a few seconds ago

	Access Request Form Name	Account	CCOP Role	Status	Created By	Created Date
1	ARF-0150	Grant	County User	Approved		12/8/2025, 9:47 AM
2	ARF-0149	Dane	County User	Rejected		12/5/2025, 2:20 PM
3	ARF-0147	Brown	County User	Rejected		12/5/2025, 1:11 PM
4	ARF-0146	Dane	County User	Rejected		12/5/2025, 11:45 AM
5	ARF-0139	Dane	County User	Approved		11/19/2025, 4:43 PM
6	ARF-0138	Lincoln	County Admin	Approved		11/10/2025, 1:48 PM
7	ARF-0136	Langlade	County Admin	Approved	Peter Pariser	11/7/2025, 6:19 PM
8	ARF-0135	Dane	County User	Approved		11/7/2025, 4:31 PM
9	ARF-0134	Dane	County User	Approved		11/7/2025, 3:13 PM
10	ARF-0133	Dane	County User	Approved		11/7/2025, 1:28 PM
11	ARF-0132	Dane	County User	In Review		11/7/2025, 11:33 AM
12	ARF-0131	Dane	County User	In Review		11/7/2025, 11:29 AM
13	ARF-0129	Milwaukee	County User	In Review		11/7/2025, 11:26 AM
14	ARF-0128	Dane	County Admin	In Review		11/7/2025, 9:40 AM

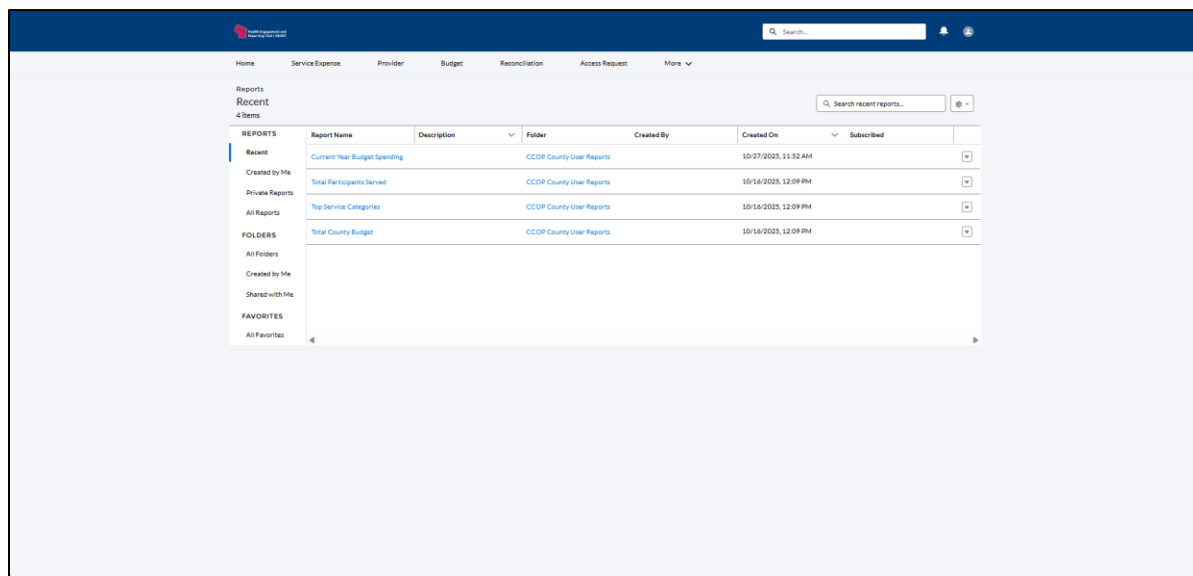
3.6 Reports Page

The Reports section in the CCOP system allows users to view pre-built reports about their county's data. County users and county admins can access reports through the navigation bar to see information about service expenses, budgets, providers, and participants for their county. If a user has access to multiple counties, the reports will aggregate data across all counties they have access to.

To reach the Reports Page, you may need to select the **More** dropdown to reveal more pages in the navigation bar.

What you'll see:

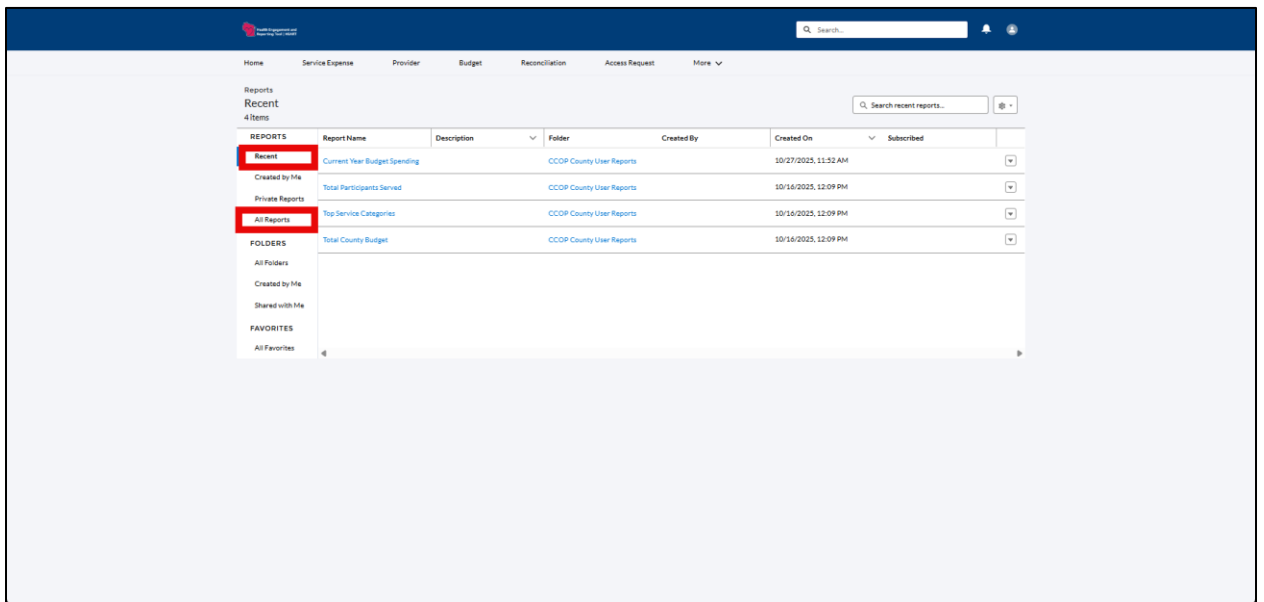
- **Left sidebar:** Recent, All Reports, Shared with Me, and Folders such as "CCOP County User Reports."
- **Main table columns:** Report Name, Description, Folder, Created By, Created On, Subscribed.



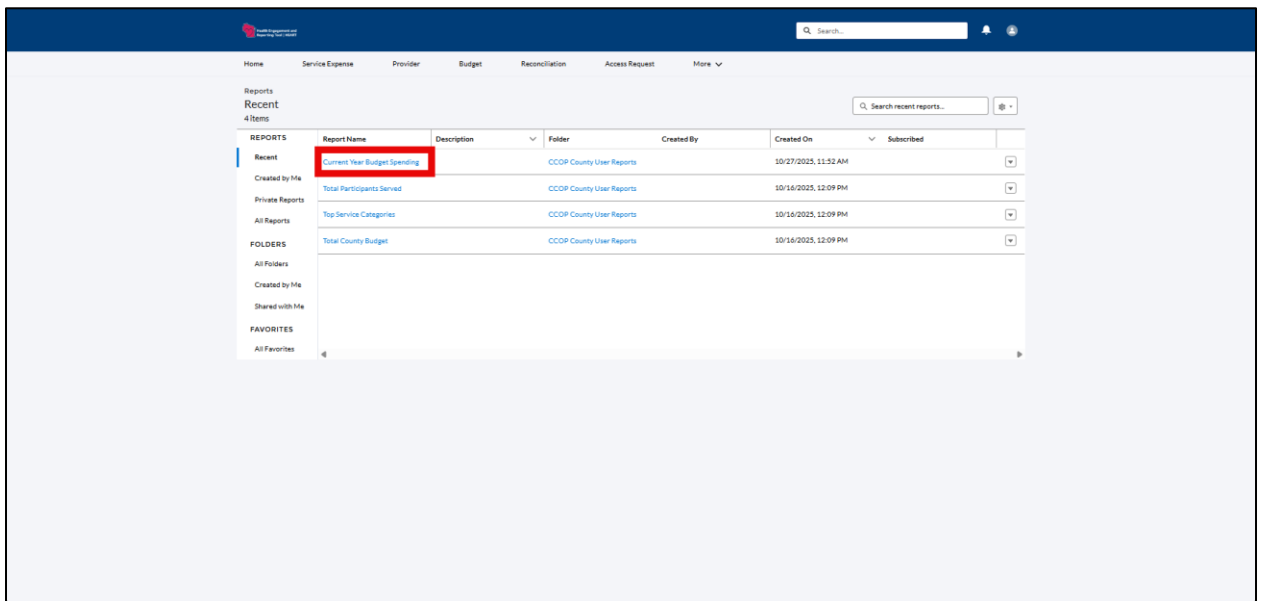
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Current Year Budget Spending		CCOP County User Reports		10/27/2023, 11:52 AM	
Created by Me	Total Participants Served		CCOP County User Reports		10/16/2023, 12:09 PM	
Private Reports	Top Service Categories		CCOP County User Reports		10/16/2023, 12:09 PM	
All Reports	Total County Budget		CCOP County User Reports		10/16/2023, 12:09 PM	
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

To view a report

1. Go to Recent or All Reports.



2. Click the report name.



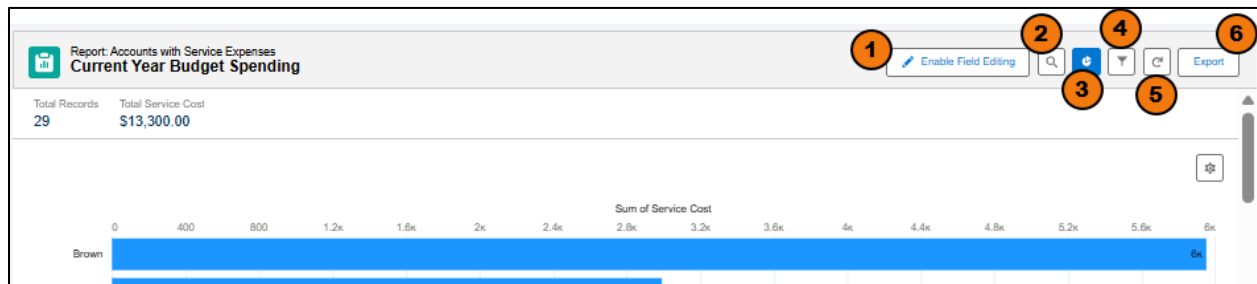
Note: Users do not have the ability to create reports or folders; they can only view them.

3.6.1 Managing Reports

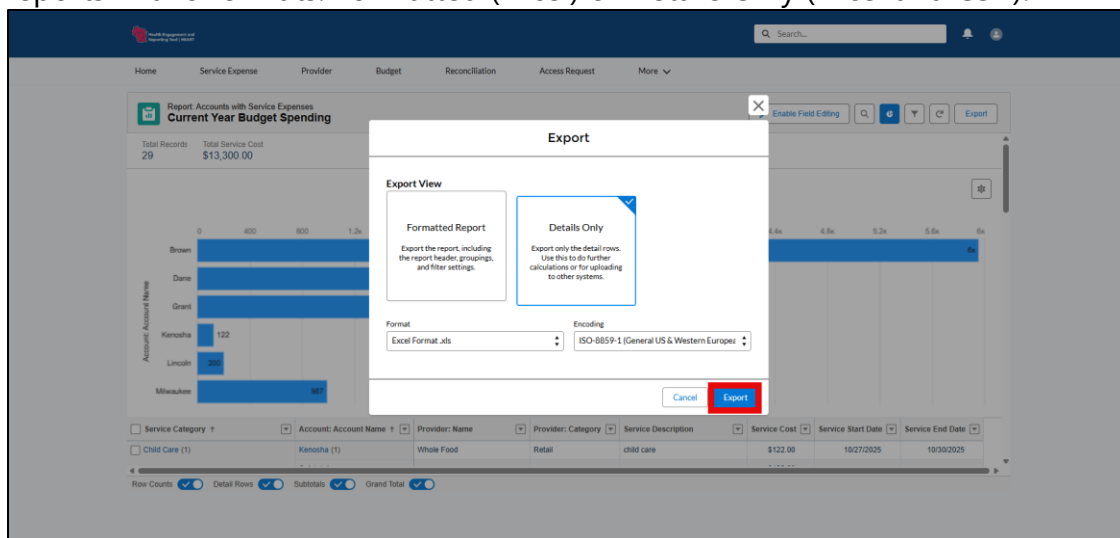
Each report includes:

- A chart summarizing the results. Hover over the chart components to see exact values.
- A table beneath the chart showing the underlying records the chart is based on

Core controls

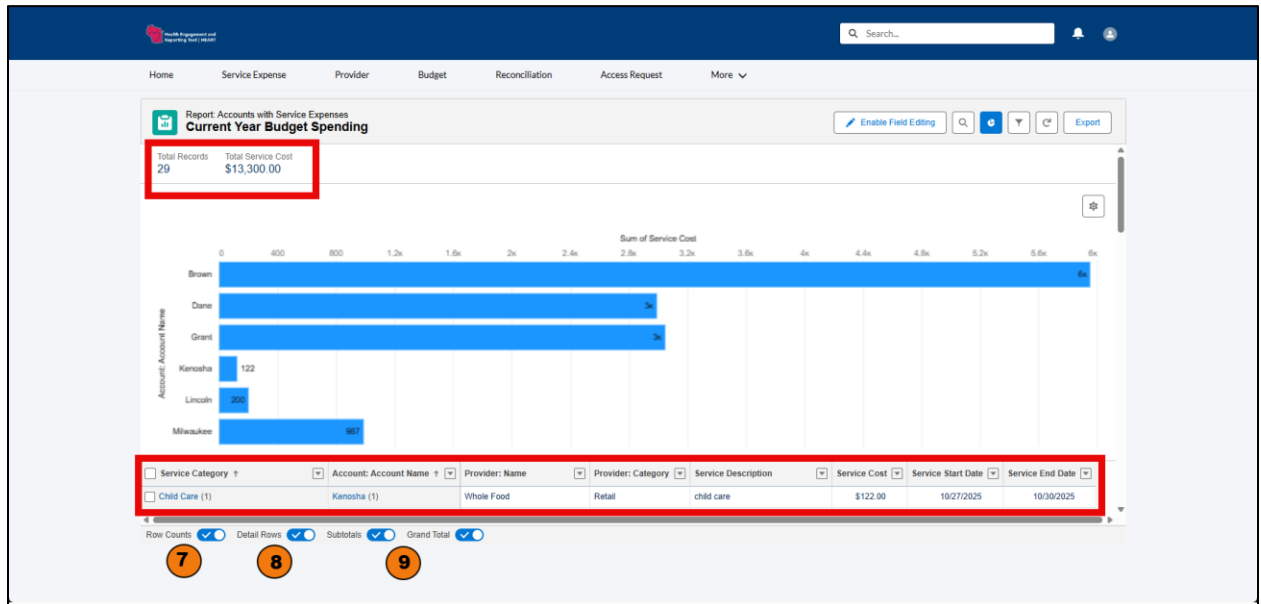


1. **Enable Field Editing:** Click the pencil icon to edit values directly in the report table. Changes save automatically when you click outside the field.
2. **Search:** Use the search box above the chart to find specific records or values.
3. **Toggle Chart:** Toggle between seeing the report chart or simple report.
4. **Filter:** Adjust the current filters. Reports can be filtered by county.
5. **Refresh button:** Click the back arrow to refresh report to the most up to date data.
6. **Export:** Click the Export button to download the report data. You can export reports in two formats: Formatted (Excel) or Details Only (Excel and CSV).



7. **Row count:** The table displays the total number of rows returned based on your current filters, helping you gauge the volume of data.
8. **Detail Rows:** ON shows individual records, OFF shows grouped summaries only.

9. **Subtotals and Grand Total:** Toggle to display group level totals and an overall total when available.



4. FAQs and Support Information

#	Question	Response
1	Who can I contact with questions about the CCOP County Portal?	If you have any questions or encounter issues with the portal, please email the appropriate inbox below: BOSS Inbox: DHSDMSBOSS@dhs.wisconsin.gov - First line of support for users having issues with the system. BFAM CLTS Fiscal Inbox: DHSCLTSFiscal@dhs.wisconsin.gov - Fiscal questions from a county waiver agency that need to be answered by a budget and policy analyst at DHS. BCS Technical Assistance Inbox: DHBCSTAC@dhs.wisconsin.gov

		- Program policy and operations questions from a county waiver agency that need to be answered by a Children and Family Program Specialist at DHS. MyWisconsin ID: https://det.wi.gov/Pages/MyWisconsin_ID.aspx or 608-471-6667 - Issues with MyWisconsin ID setup, password resets, etc.
2	Why can't I find a participant in the system?	Participants are only visible to users within their assigned county for privacy and data access reasons. The system does not display a full participant list. Rather, participants must be located using the following search criteria: First name, last name, and MCI ID. The participant search uses exact match criteria, so partial names or misspellings will return no results.
3	How do I update a participant's information?	Participant information can only be updated once a Participant has been created or found and selected in the system. Open the Participant record from the Service Expense list view. Select the "Edit" button on the record or the pencil icon next to the field, update the fields as needed, and click "Save".
4	What should I use for the provider when giving money to a parent or guardian directly?	Use the provider named "Individual" and identify who was paid and what the payment was for in the service description field.
5	Will I be able to see my county budgets if my county is part of a consortium?	If your counties are part of a consortium, you will be able to view the consortium budget rather than the individual budgets.
6	In what format should values be added in the reconciliation form?	By relevant fields, there will be a small grey circle with an 'i'. Hovering over that circle will provide additional details that will help you fill in the field. The system will also display an error if the incorrect format is entered.
7	Can I save my progress on the reconciliation form and come back to it later?	Yes. At the end of each page in the reconciliation form, there will be a button titled 'Save as Draft'. Clicking that will save your progress. There are also circular pie charts beside each subsection of the form (on the left) that display your progress. A fully green circle indicates a fully filled out section.

8	Can I edit my reconciliation form after submitting it?	No. After a form is submitted, it becomes locked and cannot be edited by the County User. Only a County Admin can take further action. If you need to make changes after submitting, contact your County Admin and request the form be rejected and unlocked for editing and resubmission.
9	How will I know when a reconciliation form is ready for me to review/ has been reviewed?	County Admins will be notified via email and via the bell icon on the HEART portal when a Reconciliation Form and/or an Access Request Form is ready for them to review. County users will be notified via email and via the bell icon on the HEART Portal when their reconciliation form and/or Access Request Form has been submitted, or when it has been approved or rejected.
10	Will I be able to see my county budgets if my county is part of a consortium?	If your counties are part of a consortium, you will be able to view the consortium budget rather than the individual budgets.
11	How do I remove a County User from my county as County Admin?	On the home page, find the "County Access" component. Select the appropriate county listed in that component. On the county record page, click the "Related" tab. In the "Related Contacts" list, locate the County User you wish to remove. Click the drop-down arrow next to the user's email and select "View Relationship". On the Account Contact Relationship record page, click "Deactivate County User Access" in the top right-hand corner. Deactivating this record removes the County User's access to that county.
12	How can I view who submitted an Access Request Form?	Navigate to the Access Request tab, then select the drop-down arrow next to Recently Viewed, and change the list view to "County User Requests". The "Created By" column displays the user who submitted the Access Request Form. You can also open the record to view additional details, such as the requestor's comments and other related fields. To pin the list view, select the pin icon next to the list view name. The pinned list view will then load as the default list view.
13	Can I remove a County Admin from my county?	No. Only DHS Users have the ability to deactivate County Admins.
14	Can I modify and/or export reports?	Yes. County Admins and County Users are able to filter and view existing reports and export reports.

