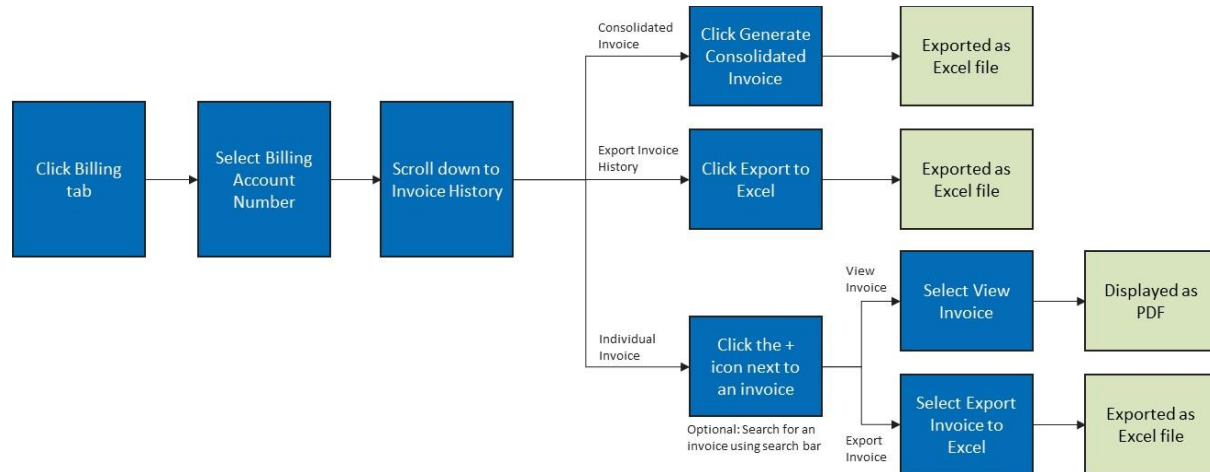


# Billing – View & Export Invoice History

Quick Reference Guide (QRG)



This Quick Reference Guide (QRG) will provide an overview of the process to View and Export Invoice History.



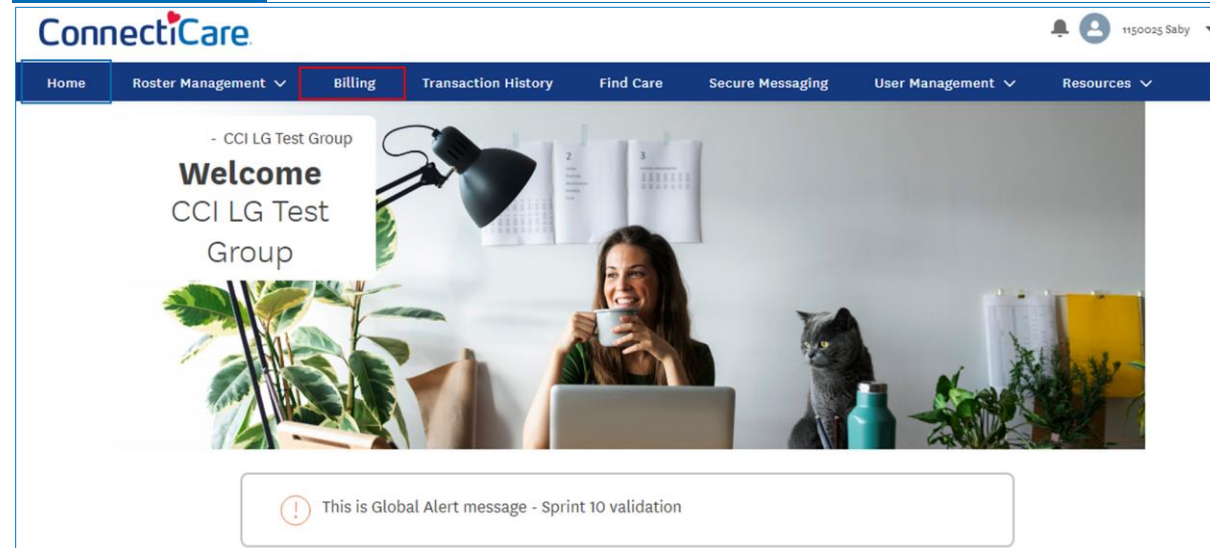
Let us look at the steps in detail to View and Export Invoice History.

### Purpose: View and Export Invoice History.



#### Step 1:

1. From the **ConnectiCare Home** page, click the **Billing** tab.





## Step 2:

The Billing screen displays.

1. Click the **Billing Account** number.

[Home > Billing](#)

- CCI LG TEST GROUP

### Billing

#### Billing Accounts

Q Search ⓘ

Billing Account	Billing Name	Billing Level	Past Amount Due*
1150025000	CCI LG Test Group	Group	\$104,545.16

\*Information is based on the latest payment processed.  
TOTAL RECORDS: 1



## Step 3:

The Billing & Payments History page displays.

1. Click Invoice History to view up to 24 months of invoice history.

[Home > Billing Details](#)

- CCI LG TEST GROUP

### Billing & Payments History

#### Billing

Billing Account 1150025000	Billing Account Name CCI LG Test Group	Billing Level Group	Billing Frequency Monthly
Invoice Number 000406239829	Invoice Date 05/15/2021	Invoice Due Date 06/01/2021	Status Unpaid
Total Amount Due \$104,545.16	Billed Amount \$26,137.54	Adjustment Amount \$0.00	Balance Forward \$78,407.62
Last Payment Amount* \$5.00	Payment Date* 03/05/2021	Days Past Due* 259	Past amount due* \$104,545.16

\*Information is based on the latest payment processed.

ⓘ If you recently made a payment, it may take up to three (3) business days to see it displayed here.  
There may be times when technical issues could prevent tasks from being completed. We thank you for your patience in these instances. Please see the transaction history page to confirm the initiation and status of your portal transactions. ConnectiCare takes no responsibility for, and is not liable for, the portal being temporarily unavailable due to technical issues.

Set up Auto Pay

Make a Payment

Request Updated Bill

Invoice History

Payment History

Ask A Question



#### Step 4:

The Invoice History table displays.

1. (Optional) Enter specific information in the **Search** bar to refine your search results.
2. Click **Export to Excel** to download the invoice history as an Excel file.

Invoice History

View up to 24 months of invoice history.

Generate Consolidated Invoice

Export to Excel

Invoice Number	Invoice Date	Billed Amount	Adjustment Amount	Total Amount Due	Payment Amount*	Invoice Due Date	Outstanding Amount*	Invoice Status	
000406239829	05/15/2021	\$26,137.54	\$0.00	\$104,545.16	\$0.00	06/01/2021	\$26,137.54	Unpaid	+
000406237881	05/01/2021	\$26,137.54	\$0.00	\$78,407.62	\$0.00	05/01/2021	\$26,137.54	Unpaid	+
000406237880	05/01/2021	\$26,137.54	\$0.00	\$52,270.08	\$0.00	04/01/2021	\$26,137.54	Unpaid	+
000406236907	03/01/2021	\$26,137.54	\$0.00	\$26,137.54	\$5.00	03/01/2021	\$26,132.54	Paid not within tolerance	+
000406234042	01/14/2021	\$26,137.54	\$0.00	\$26,137.54	\$26,137.54	02/01/2021	\$0.00	Paid in Full	+
000406232105	01/06/2021	\$27,126.55	\$0.00	\$126,432.27	\$27,126.55	01/01/2021	\$0.00	Paid in Full	+
000406230165	12/22/2020	\$24,826.43	\$0.00	\$99,305.72	\$24,826.43	12/01/2020	\$0.00	Paid in Full	+
000406230164	12/22/2020	\$24,826.43	\$0.00	\$74,479.29	\$24,826.43	11/01/2020	\$0.00	Paid in Full	+
000406230163	12/22/2020	\$24,826.43	\$0.00	\$49,652.86	\$24,826.43	10/01/2020	\$0.00	Paid in Full	+
000406229441	08/15/2020	\$24,826.43	\$0.00	\$24,826.43	\$24,826.43	09/01/2020	\$0.00	Paid in Full	+

\*Information is based on the latest payment processed.

TOTAL RECORDS: 18



## Step 5:

The Two-Step Account Verification screen displays.

**Note:** While a user is signed-in to the portal, this screen will only display on the first attempt to export to Excel.

1. Click **Email Address** or **Mobile Number** to receive a verification code.
2. Click **Request Code**.
3. Enter the code.

**Note:** If you experience any issues receiving the code, click **Request a new one** or **Try a different way**.

4. Click **Next**.

For security reasons, we require a secondary verification step before you can access your account.  
Where should we send this code?

Email Address

Request Code

We've sent a code to your email address at xxxxxx4@cognizant.com. Please check your email now as this code will expire in 15 minutes.

Haven't received a code? [Request a new one.](#)

Having trouble receiving code? [Try a different way.](#)

Enter verification code

12345

Verification successful. Click "Next" to access your account.

Next



## Step 6:

1. Click the downloaded report to view the invoice history

### Invoice History

View up to 24 months of invoice history.

Search

Generate Consolidated Invoice

Export to Excel

Invoice Number	Invoice Date	Billed Amount	Adjustment Amount	Total Amount Due	Payment Amount*	Invoice Due Date	Outstanding Amount*	Invoice Status	
000406239829	5/15/2021	\$26,137.54	\$0.00	\$104,545.16	\$0.00	6/1/2021	\$26,137.54	Unpaid	+
000406237881	5/1/2021	\$26,137.54	\$0.00	\$78,407.62	\$0.00	5/1/2021	\$26,137.54	Unpaid	+
000406237880	5/1/2021	\$26,137.54	\$0.00	\$52,270.08	\$0.00	4/1/2021	\$26,137.54	Unpaid	+
000406236907	3/1/2021	\$26,137.54	\$0.00	\$26,137.54	\$5.00	3/1/2021	\$26,132.54	Paid not within tolerance	+
000406234042	1/14/2021	\$26,137.54	\$0.00	\$26,137.54	\$26,137.54	2/1/2021	\$0.00	Paid in Full	+
000406232105	1/6/2021	\$27,126.55	\$0.00	\$126,432.27	\$27,126.55	1/1/2021	\$0.00	Paid in Full	+
000406230165	12/22/2020	\$24,826.43	\$0.00	\$99,305.72	\$24,826.43	12/1/2020	\$0.00	Paid in Full	+
000406230164	12/22/2020	\$24,826.43	\$0.00	\$74,479.29	\$24,826.43	11/1/2020	\$0.00	Paid in Full	+

Invoice-History-16...xlsx

Show all



## Step 7:

The invoice history details are displayed in an Excel spreadsheet.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Invoice Number	Invoice Date	Billed Amo	Adjustmen	Total Amount Due	Payment Amount*	Invoice Due Date	Outstanding Amount*	Invoice Status				
2	000406242477	10/01/2021	\$43,242.16	\$0.00	\$346,958.28	\$43,242.16	10/01/2021	\$0.00	Paid in Full				
3	000406242476	10/01/2021	\$43,242.16	\$0.00	\$303,716.12	\$43,242.16	09/01/2021	\$0.00	Paid in Full				
4	000406242475	10/01/2021	\$43,242.16	\$0.00	\$260,473.96	\$43,242.16	08/01/2021	\$0.00	Paid in Full				
5	000406242474	10/01/2021	\$43,242.16	\$0.00	\$217,231.80	\$43,242.16	07/01/2021	\$0.00	Paid in Full				
6	000406239657	05/15/2021	\$43,242.16	\$0.00	\$173,989.64	\$43,242.16	06/01/2021	\$0.00	Paid in Full				
7	000406237925	05/01/2021	\$43,242.16	\$0.00	\$130,747.48	\$43,242.16	05/01/2021	\$0.00	Paid in Full				
8	000406237924	05/01/2021	\$43,242.16	\$0.00	\$87,505.32	\$43,242.16	04/01/2021	\$0.00	Paid in Full				
9	000406236924	03/01/2021	\$44,263.16	\$0.00	\$44,263.16	\$44,263.16	03/01/2021	\$0.00	Paid in Full				
10	000406233093	01/07/2021	\$45,814.91	\$0.00	\$379,250.60	\$45,814.91	02/01/2021	\$0.00	Paid in Full				
11	000406230264	12/30/2020	\$41,031.36	\$0.00	\$333,435.69	\$41,031.36	01/01/2021	\$0.00	Paid in Full				
12	000406230224	12/27/2020	\$28,130.65	\$0.00	\$292,404.33	\$28,130.65	12/01/2020	\$0.00	Paid in Full				
13	000406230223	12/27/2020	\$24,024.88	\$0.00	\$264,273.68	\$24,024.88	11/01/2020	\$0.00	Paid in Full				
14	000406230222	12/27/2020	\$24,024.88	\$0.00	\$240,248.80	\$24,024.88	10/01/2020	\$0.00	Paid in Full				
15	000406230221	12/27/2020	\$24,024.88	\$0.00	\$216,223.92	\$24,024.88	09/01/2020	\$0.00	Paid in Full				
16	000406230220	12/27/2020	\$24,024.88	\$0.00	\$192,199.04	\$24,024.88	08/01/2020	\$0.00	Paid in Full				
17	000406230219	12/27/2020	\$24,024.88	\$0.00	\$168,174.16	\$24,024.88	07/01/2020	\$0.00	Paid in Full				
18	000406230218	12/27/2020	\$24,024.88	\$0.00	\$144,149.28	\$24,024.88	06/01/2020	\$0.00	Paid in Full				
19	000406230217	12/27/2020	\$24,024.88	\$0.00	\$120,124.40	\$24,024.88	05/01/2020	\$0.00	Paid in Full				



## Step 8:

1. Click **Generate Consolidated Invoice** to export 12 months of consolidated invoice history to Excel.  
**Note:** Self-insured users will not have this option.

Invoice Number	Invoice Date	Billed Amount	Adjustment Amount	Total Amount Due	Payment Amount*	Invoice Due Date	Outstanding Amount*	Invoice Status	
000406239829	05/15/2021	\$26,137.54	\$0.00	\$104,545.16	\$0.00	06/01/2021	\$26,137.54	Unpaid	+
000406237881	05/01/2021	\$26,137.54	\$0.00	\$78,407.62	\$0.00	05/01/2021	\$26,137.54	Unpaid	+
000406237880	05/01/2021	\$26,137.54	\$0.00	\$52,270.08	\$0.00	04/01/2021	\$26,137.54	Unpaid	+
000406236907	03/01/2021	\$26,137.54	\$0.00	\$26,137.54	\$5.00	03/01/2021	\$26,132.54	Paid not within tolerance	+
000406234042	01/14/2021	\$26,137.54	\$0.00	\$26,137.54	\$26,137.54	02/01/2021	\$0.00	Paid in Full	+
000406232105	01/06/2021	\$27,126.55	\$0.00	\$126,432.27	\$27,126.55	01/01/2021	\$0.00	Paid in Full	+
000406230165	12/22/2020	\$24,826.43	\$0.00	\$99,305.72	\$24,826.43	12/01/2020	\$0.00	Paid in Full	+
000406230164	12/22/2020	\$24,826.43	\$0.00	\$74,479.29	\$24,826.43	11/01/2020	\$0.00	Paid in Full	+
000406230163	12/22/2020	\$24,826.43	\$0.00	\$49,652.86	\$24,826.43	10/01/2020	\$0.00	Paid in Full	+
000406229441	08/15/2020	\$24,826.43	\$0.00	\$24,826.43	\$24,826.43	09/01/2020	\$0.00	Paid in Full	+

\*Information is based on the latest payment processed.  
TOTAL RECORDS: 18



### Step 9:

The Confirmation page displays.

1. Click **Done**.

## Success

We have received your request. You will get a bell notification when the invoice is ready for viewing.

Done



### Step 10:

1. Click the **Bell** icon and from the drop-down menu select the latest report to view the consolidated invoice history.

The screenshot shows the ConnectiCare interface. At the top, there's a navigation bar with links: Home, Roster Management, Billing, Transaction History, Find Care, and Secure Message. A user profile for '1150025 Saby' is visible in the top right corner. Below the navigation bar, the main heading is 'Billing & Payments History'. On the left, there's a 'Billing' section with a dropdown arrow. Below it, a table displays billing details:

Billing Account	Billing Account Name	Billing Level
1150025000	CCI LG Test Group	Group

Invoice Number	Invoice Date	Invoice Due Date
000406239829	05/15/2021	06/01/2021

Total Amount Due	Billed Amount	Adjustment Amount
\$104,545.16	\$26,137.54	\$0.00

On the right side, a 'Notifications' dropdown menu is open, showing a list of notifications. The first notification is highlighted with a red box:

- 000406239829**  
Your invoice is now ready to be exported Excel  
a minute ago
- Consolidated invoice**  
Your Consolidated Invoice is ready for viewing  
43 minutes ago
- Consolidated invoice**  
Your Consolidated Invoice is ready for viewing  
2 hours ago
- 000406234042**  
Your invoice is now ready to be exported Excel  
Dec 23, 2021 2:05 PM
- 000406236907**  
Your invoice is now ready to be exported Excel  
Dec 23, 2021 2:02 PM





## Step 11:

The consolidated invoice history details are displayed in an Excel spreadsheet.

INVOICE DATE																
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	INVOICE DATE	INVOICE N	INVOICE C	COVERAG	COVERAGE END DATE	CLASS ID	PLAN ID	SUB-GROL	GROUP ID	SUBSCRIBI	LAST NAM	FIRST NAM	SSN	DISPOSITI	FAMILY IN BAF	PREMIUM DUE
2	5/11/2021	'000000000	6/1/2021	6/1/2021	6/30/2021	1001	ME001160	1001		K37500026	DANNY	PASTRY	'91679076	Modal	Subscribe	\$0.00
3	5/11/2021	'000000000	6/1/2021	6/1/2021	6/30/2021	4001	MP001090	1001		K37500422	PARKER	PETER	'78123687	Modal	Subscribe	\$1,021.00
4	5/11/2021	'000000000	6/1/2021	6/1/2021	6/30/2021	1001	ME001160	1001		K37500685	HARISH	RAGAV	'70079076	Modal	Subscribe	\$919.12
5	5/11/2021	'000000000	6/1/2021	6/1/2021	6/30/2021	1001	MP001090	1001		K55010734	ROWLDEN	CLARRY	'76532123	Modal	Subscribe	\$1,715.28
6	5/11/2021	'000000000	6/1/2021	6/1/2021	6/30/2021	1001	MP001090	1001		K55010736	JENNI	JOFEFH	'75887788	Modal	Subscribe	\$1,021.00
7	5/11/2021	'000000000	6/1/2021	6/1/2021	6/30/2021	1001	MP001090	1001		K55010895	MIKE	HUSSIE	'76538876	Modal	Subscribe	\$1,715.28
8	5/11/2021	'000000000	6/1/2021	6/1/2021	6/30/2021	1001	ME001160	1001		K80111295	BARRY	KELLY	'08646648	Modal	Subscribe	\$1,544.12
9	5/11/2021	'000000000	6/1/2021	6/1/2021	6/30/2021	1001	ME001160	1001		K80225521	SIDNEY	PHIL	'05018764	Modal	Subscribe	\$919.12
10	5/11/2021	'000000000	6/1/2021	6/1/2021	6/30/2021	1001	MP001090	1001		K80270154	JOHN	SUZAN	'06441029	Modal	Subscribe	\$1,021.00
11	2/13/2021	'00040623	1/1/2020	1/1/2020	1/31/2020	1001	ME001160	1001		K80111295	BARRY	KELLY	'08646648	Modal	Subscribe	\$1,544.12
12	2/13/2021	'00040623	1/1/2020	1/1/2020	1/31/2020	1001	MP001090	1001		K80250986	JIM U SAR	MARSHA	'10629452	Modal	Family	\$3,236.57
13	2/13/2021	'00040623	9/1/2020	9/1/2020	9/30/2020	1001	MP001090	1001		K80250986	JIM U SAR	MARSHA	'10629452	Modal	Family	\$3,236.57
14	2/13/2021	'00040623	1/1/2020	1/1/2020	1/31/2020	1001	MP001090	1001		K80270154	JOHN	SUZAN	'06441029	Modal	Subscribe	\$1,021.00
15	2/13/2021	'00040623	1/1/2020	1/1/2020	1/31/2020	1001	ME001160	1001		K80470606	CHRISTY	EDDIE	'05221971	Modal	Subscribe	\$919.12
16	2/13/2021	'00040623	1/1/2020	1/1/2020	1/31/2020	1001	MP001090	1001		K80494000	ALEX	LAWREN F	'17085778	Modal	Subscribe	\$1,715.28
17	2/13/2021	'00040623	1/1/2020	1/1/2020	1/31/2020	1001	ME001160	1001		K80626756	YO. MICH	ANDRE	'05252686	Modal	Subscribe	\$1,544.12
18	2/13/2021	'00040623	1/1/2020	1/1/2020	1/31/2020	1001	MP001090	1001		K80749481	KIM	SIDNEY	'09252793	Modal	Subscribe	\$2,276.83
19	6/19/2021	'000000000	7/1/2021	6/1/2021	6/30/2021	1001	MP001090	1001		K37504700	JAMES	SAM	'22469698	Retroactiv	Subscribe	\$1,021.00
20	6/19/2021	'000000000	7/1/2021	7/1/2021	7/31/2021	1001	MP001090	1001		K55010734	ROWLDEN	CLARRY	'76532123	Modal	Subscribe	\$1,715.28



## Step 12:

Return to the Invoice History table.

- Click the **Plus** icon next to an individual invoice and from the drop-down select **View Invoice** to download a PDF version of the invoice.

**Note:** Self-insured users will only have the option to **View Invoice** from the **Plus** icon.

Invoice History								
View up to 24 months of invoice history.								
Search		Generate Consolidated Invoice			Export to Excel			
Invoice Number	Invoice Date	Billed Amount	Adjustment Amount	Total Amount Due	Payment Amount*	Invoice Due Date	Outstanding Amount*	Invoice Status
000000000107719	12/14/2021	\$7,875.90	\$0.00	\$47,120.40	\$0.00	01/01/2022	\$7,875.90	Unpaid
000000000074021	11/22/2021	\$7,875.90	\$0.00	\$39,244.50	\$0.00	12/01/2021	\$7,875.90	View Invoice
000000000069353	10/20/2021	\$7,875.90	\$0.00	\$31,368.60	\$0.00	11/01/2021	\$7,875.90	Export Invoice to Excel
000000000069352	10/20/2021	\$7,875.90	\$0.00	\$23,492.70	\$0.00	10/01/2021	\$7,875.90	Ask A Question
000000000069351	10/20/2021	\$7,875.90	\$0.00	\$15,616.80	\$0.00	09/01/2021	\$7,875.90	Unpaid





### Step 13:

The invoice opens as a PDF.

1. Click the **Arrow** icon to save the downloaded invoice.
2. Click the **Printer** icon to print the downloaded invoice.

175 Scott Swamp Road, Farmington, CT 06034-4058

**ConnectiCare**

Page 1 of 8

**FOR BILLING INQUIRIES:**  
Call 1-866-204-3132  
**COVERAGE PERIOD:**  
09/01/21 - 09/30/21

CCI LG Test Group

**ConnectiCare**  
**COMMERCIAL STATEMENT**

DUE DATE	NAME	GROUP/ACCOUNT #	INVOICE #	INVOICE DATE	AMOUNT DUE
01/01/2022	CCI LG Test Group	1150025000	000000000107719	12/14/2021	\$47,120.40

**IMPORTANT MESSAGE:**

View your invoice and payment history at [www.connecticare.com/employer](http://www.connecticare.com/employer)

Total amount due may include producer commission or service fees.

**REMINDER NOTICE:**



### Step 14:

Return to the Invoice History table.

1. Click the **Plus** icon and from the drop-down select **Export Invoice to Excel** to download individual invoice history.

Invoice History

View up to 24 months of invoice history.

Search

Generate Consolidated Invoice Export to Excel

Invoice Number	Invoice Date	Billed Amount	Adjustment Amount	Total Amount Due	Payment Amount*	Invoice Due Date	Outstanding Amount*	Invoice Status
000406239829	05/15/2021	\$26,137.54	\$0.00	\$104,545.16	\$0.00	06/01/2021	\$26,137.54	Unpaid
000406237881	05/01/2021	\$26,137.54	\$0.00	\$78,407.62	\$0.00	05/01/2021	\$26,137.54	Unpaid
000406237880	05/01/2021	\$26,137.54	\$0.00	\$52,270.08	\$0.00	04/01/2021	\$26,137.54	Unpaid
000406236907	03/01/2021	\$26,137.54	\$0.00	\$26,137.54	\$5.00	03/01/2021	\$26,132.54	Paid in tolerance

Export Invoice to Excel



### Step 15:

1. Click the **Bell** icon and from the drop-down menu select the latest report to view individual invoice history.



### Step 16:

The individual invoice history details are displayed in an Excel spreadsheet.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	INVOICE DA	INVOICE NL	INVOICE DI	COVERAGE STA	COVERAGE ENC	CLASS ID	PLAN ID	SUB-GROU	GROUP ID	SUBSCRIBI	LAST NAM	FIRST NAM	SSN	DISPOSITI	FAMILY IN	BAF	PREMIUM DUE		
2	2/13/2021	0004062350	1/1/2020	1/1/2020	1/31/2020	1001	ME001160	1001		K8011129	BARRY	KELLY	0864664	Modal	Subscribe	\$0.00	1,544.12		
3																			
4																			
5																			
6																			
7																			
8																			
9																			
10																			
11																			
12																			
13																			
14																			
15																			
16																			
17																			
18																			
19																			

# Thank You