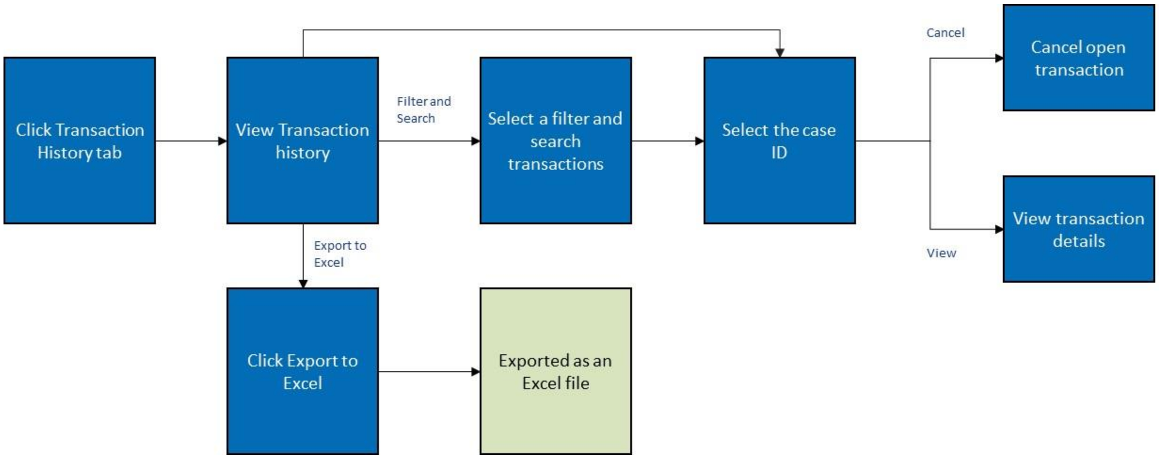
View Transaction History & Transaction Details

Quick Reference Guide (QRG)

This Quick Reference Guide (QRG) will provide an overview on viewing Transaction History and transaction details.

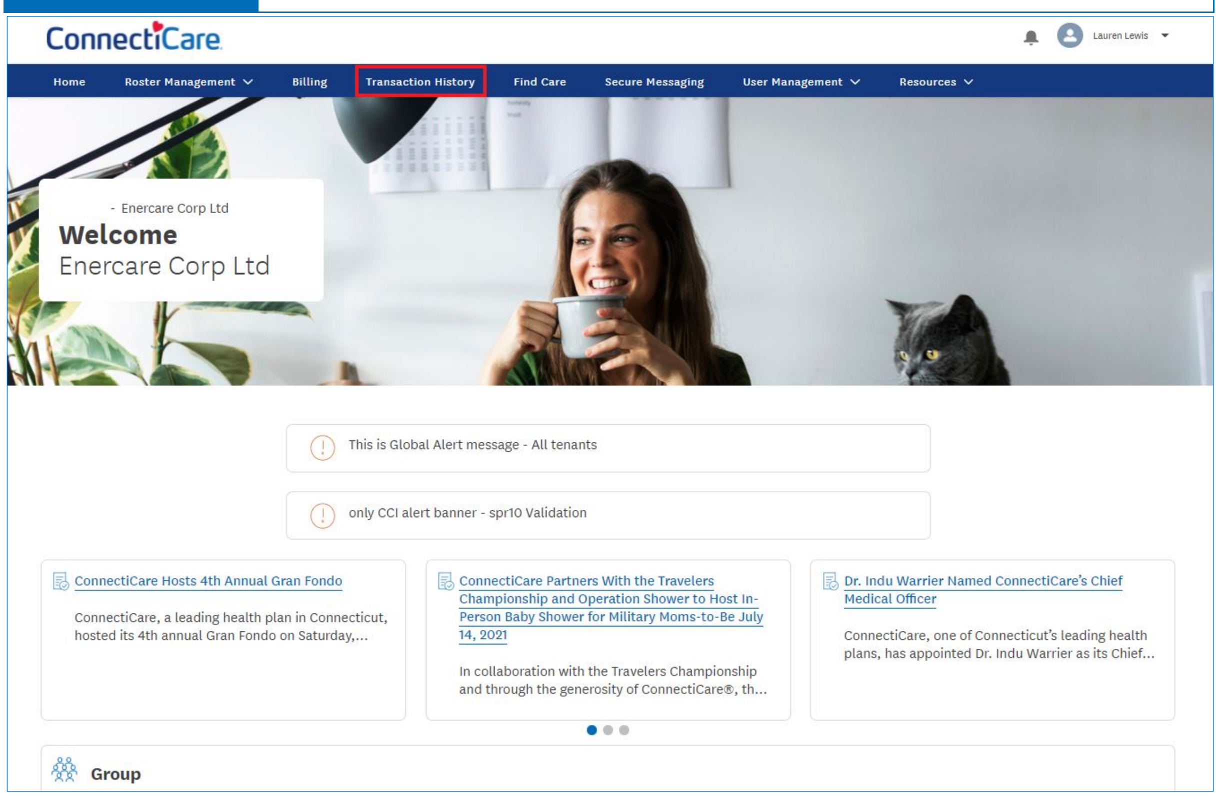


Let us look at the steps in detail for viewing transaction history and transaction details.

Purpose: To view Transaction History and transaction details.

Step 1:

1. From the **ConnectiCare Home** page, click the **Transaction History** tab.
   Note: Transaction History shows the status of the transactions done in the last 24 months.



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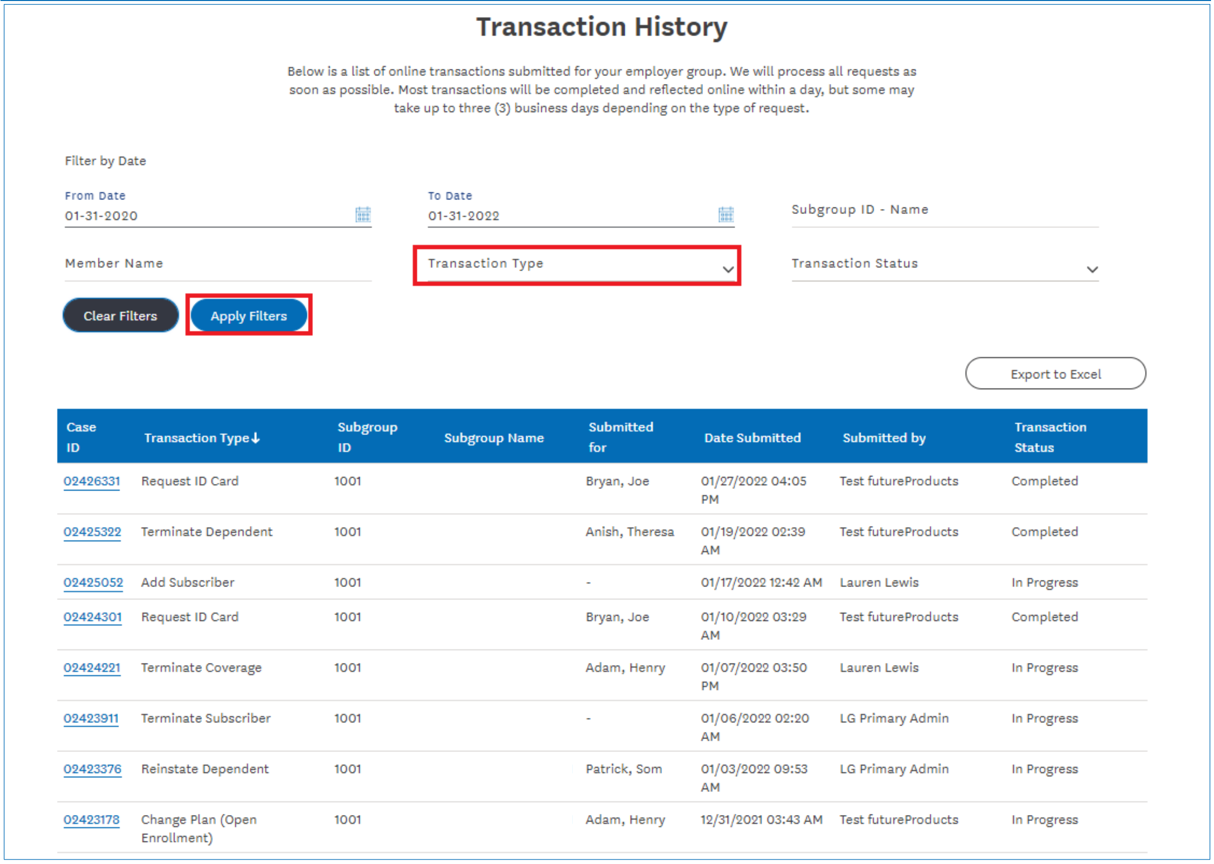
Step 2:

The Transaction History screen displays.

Note: Transaction results can be filtered by From Date – To Date, Subgroup ID - Name, Member Name, Transaction Type and Transaction Status. A transaction can be cancelled only if it has an “open” status. (All transaction types and transaction statuses are listed at the end of this document.)

1. (Optional) Select the relevant **Transaction Type**.
2. Click **Apply Filters**.



Transaction History

Below is a list of online transactions submitted for your employer group. We will process all requests as soon as possible. Most transactions will be completed and reflected online within a day, but some may take up to three (3) business days depending on the type of request.

Filter by Date

From Date 01-31-2020

To Date 01-31-2022

Subgroup ID - Name

Member Name

Transaction Type

Transaction Status

Clear Filters

Apply Filters

Export to Excel

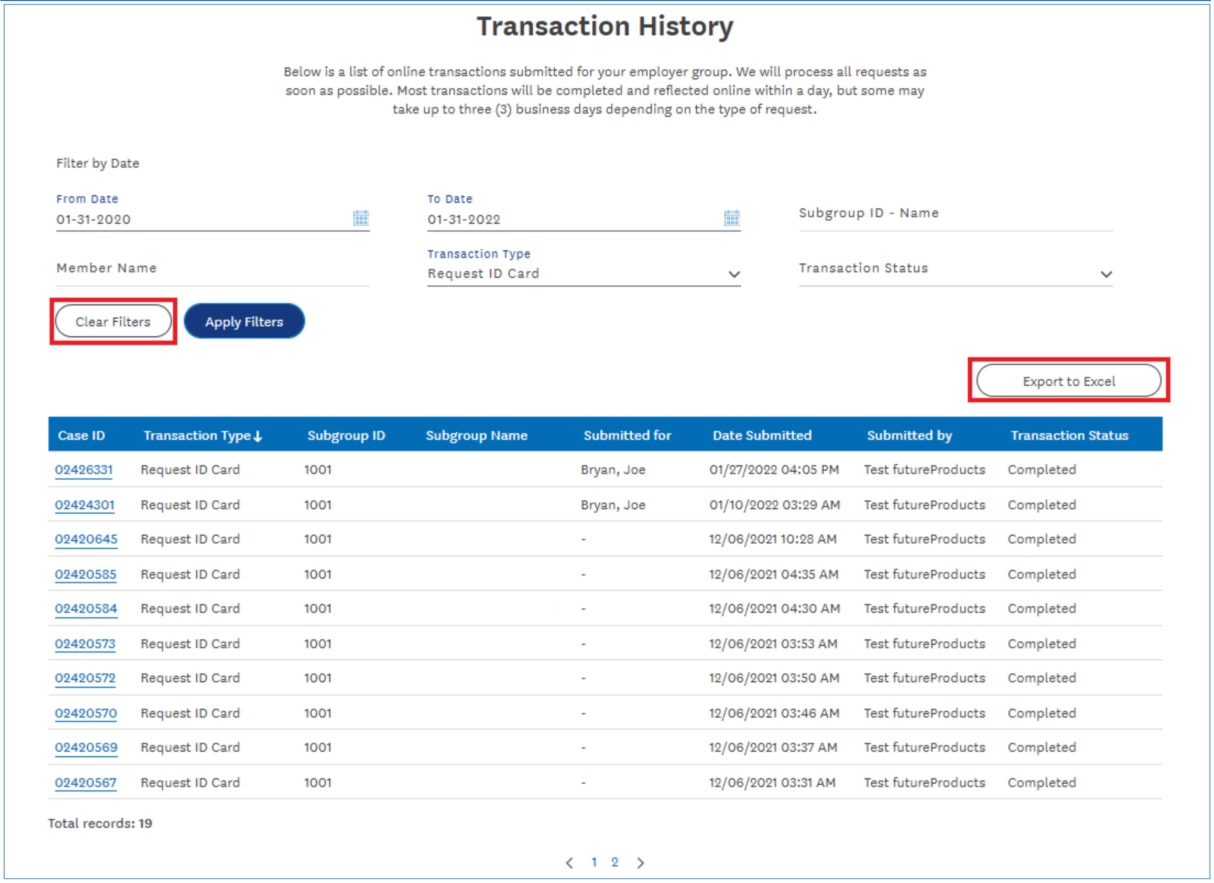
Case ID	Transaction Type	Subgroup ID	Subgroup Name	Submitted for	Date Submitted	Submitted by	Transaction Status
02426331	Request ID Card	1001		Bryan, Joe	01/27/2022 04:05 PM	Test futureProducts	Completed
02425322	Terminate Dependent	1001		Anish, Theresa	01/19/2022 02:39 AM	Test futureProducts	Completed
02425052	Add Subscriber	1001		-	01/17/2022 12:42 AM	Lauren Lewis	In Progress
02424301	Request ID Card	1001		Bryan, Joe	01/10/2022 03:29 AM	Test futureProducts	Completed
02424221	Terminate Coverage	1001		Adam, Henry	01/07/2022 03:50 PM	Lauren Lewis	In Progress
02423911	Terminate Subscriber	1001		-	01/06/2022 02:20 AM	LG Primary Admin	In Progress
02423376	Reinstate Dependent	1001		Patrick, Som	01/03/2022 09:53 AM	LG Primary Admin	In Progress
02423178	Change Plan (Open Enrollment)	1001		Adam, Henry	12/31/2021 03:43 AM	Test futureProducts	In Progress

Step 3:

The filtered results are displayed.

Note: In this example, we selected Request ID Card as the transaction type.

1. (Optional) Click **Export to Excel** to download the search results as an Excel file.
2. (Optional) Click **Clear Filters** to remove the search filter.



Transaction History

Below is a list of online transactions submitted for your employer group. We will process all requests as soon as possible. Most transactions will be completed and reflected online within a day, but some may take up to three (3) business days depending on the type of request.

Filter by Date

From Date: 01-31-2020

To Date: 01-31-2022

Subgroup ID - Name

Member Name

Transaction Type: Request ID Card

Transaction Status

Clear Filters | Apply Filters

Export to Excel

Case ID	Transaction Type ↓	Subgroup ID	Subgroup Name	Submitted for	Date Submitted	Submitted by	Transaction Status
02426331	Request ID Card	1001		Bryan, Joe	01/27/2022 04:05 PM	Test futureProducts	Completed
02424301	Request ID Card	1001		Bryan, Joe	01/10/2022 03:29 AM	Test futureProducts	Completed
02420645	Request ID Card	1001		-	12/06/2021 10:28 AM	Test futureProducts	Completed
02420585	Request ID Card	1001		-	12/06/2021 04:35 AM	Test futureProducts	Completed
02420584	Request ID Card	1001		-	12/06/2021 04:30 AM	Test futureProducts	Completed
02420573	Request ID Card	1001		-	12/06/2021 03:53 AM	Test futureProducts	Completed
02420572	Request ID Card	1001		-	12/06/2021 03:50 AM	Test futureProducts	Completed
02420570	Request ID Card	1001		-	12/06/2021 03:46 AM	Test futureProducts	Completed
02420569	Request ID Card	1001		-	12/06/2021 03:37 AM	Test futureProducts	Completed
02420567	Request ID Card	1001		-	12/06/2021 03:31 AM	Test futureProducts	Completed

Total records: 19

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Step 4:

The filtered results open in an excel file.

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	A	B	C	D	E	F	G	H
1	Case ID	Transactio	Subgroup	Subgroup	Date Time	Executed I	Transaction Status	
2	02426331	Request ID	1001		01/27/202	Bryan, Joe	Completed	
3	02424301	Request ID	1001		01/10/202	Bryan, Joe	Completed	
4	02420645	Request ID	1001		12/06/202	-	Completed	
5	02420585	Request ID	1001		12/06/202	-	Completed	
6	02420584	Request ID	1001		12/06/202	-	Completed	
7	02420573	Request ID	1001		12/06/202	-	Completed	
8	02420572	Request ID	1001		12/06/202	-	Completed	
9	02420570	Request ID	1001		12/06/202	-	Completed	
10	02420569	Request ID	1001		12/06/202	-	Completed	
11	02420567	Request ID	1001		12/06/202	-	Completed	
12	02420565	Request ID	1001		12/06/202	-	Completed	
13	02420563	Request ID	1001		12/06/202	-	Completed	
14	02420561	Request ID	1001		12/06/202	-	Completed	
15	02420559	Request ID	1001		12/06/202	-	Completed	
16	02420558	Request ID	1001		12/06/202	-	Completed	
17	02420553	Request ID	1001		12/06/202	-	Completed	
18	02420545	Request ID	1001		12/06/202	-	Completed	
19	02415952	Request ID	5001		10/22/202	-	Completed	
20	02415858	Request ID	5001		10/21/202	-	Completed	

Step 5:

The Transaction details of any transaction can be viewed by clicking the corresponding Case ID.

1. Click the **Case ID**.

Filter by Date

From Date: 01-31-2020

To Date: 01-31-2022

Subgroup ID - Name

Member Name

Transaction Type: Request ID Card

Transaction Status

Clear Filters | Apply Filters

Export to Excel

Case ID	Transaction Type	Subgroup ID	Subgroup Name	Submitted for	Date Submitted	Submitted by ↑	Transaction Status
02408313	-			-	05/11/2021 06:40 AM	Y Yamuna	-
02408316	-			-	05/12/2021 09:45 AM	Y Yamuna	Open*
02410405	Add Subscriber	5001	Enercare Corp SG 1	-	08/16/2021 10:08 AM	Test futureProducts	Open*
02410414	Change Group Billing POC			Enercare Corp Ltd	08/16/2021 12:19 PM	Test futureProducts	Open*
02410415	Change Sub Group Primary POC			Enercare Corp SG 1	08/16/2021 12:24 PM	Test futureProducts	Open*
02411238	Add Subscriber	5001	Enercare Corp SG 1	-	08/27/2021 05:50 AM	31TestMMA Completemod	Open*
02412639	Change Group Billing POC			Enercare Corp Ltd	09/16/2021 07:24 AM	Test futureProducts	Open*
02412642	Change Sub Group Primary POC			-	09/16/2021 07:30 AM	Test futureProducts	Open*

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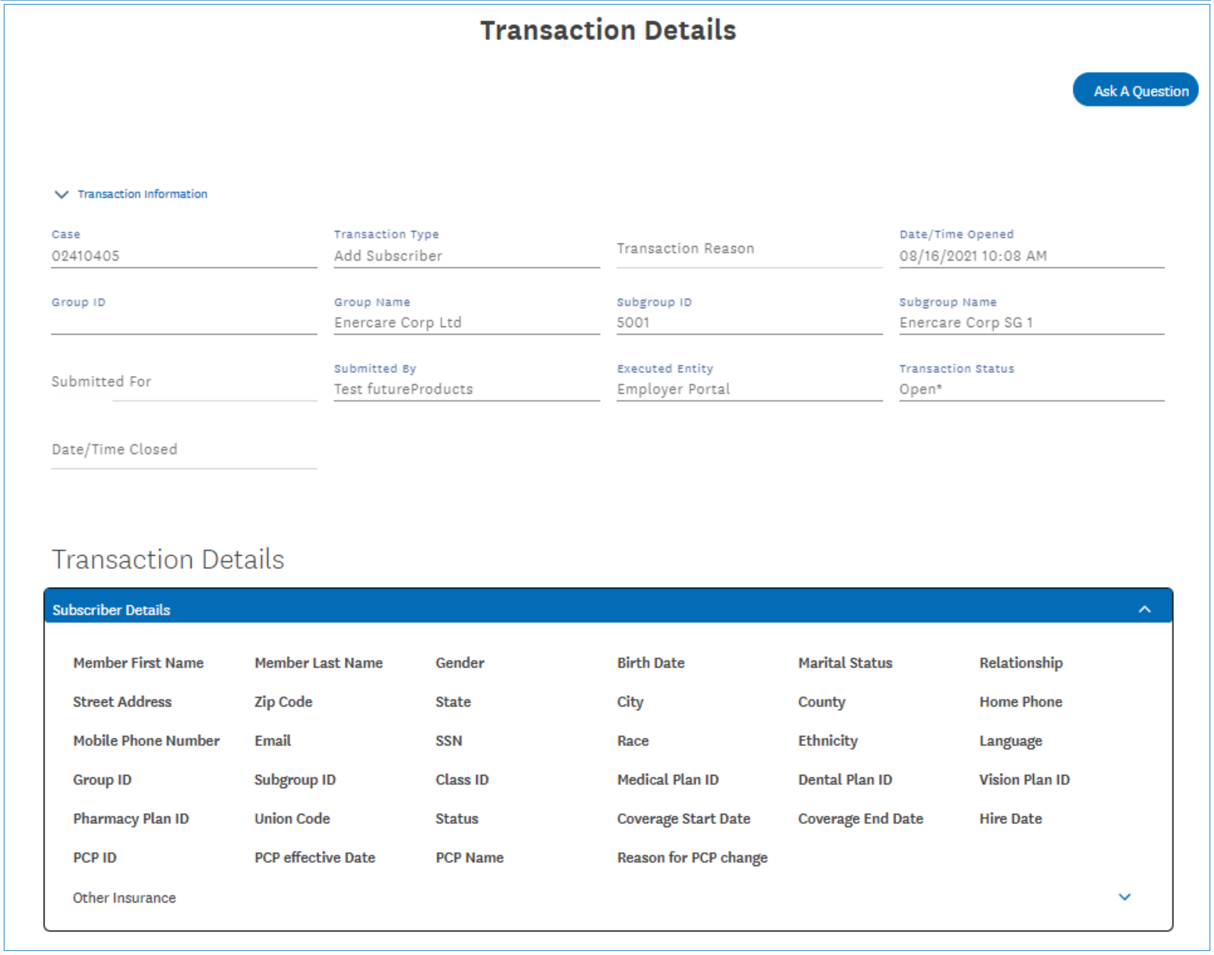
Step 6:

The Transaction Details page displays.

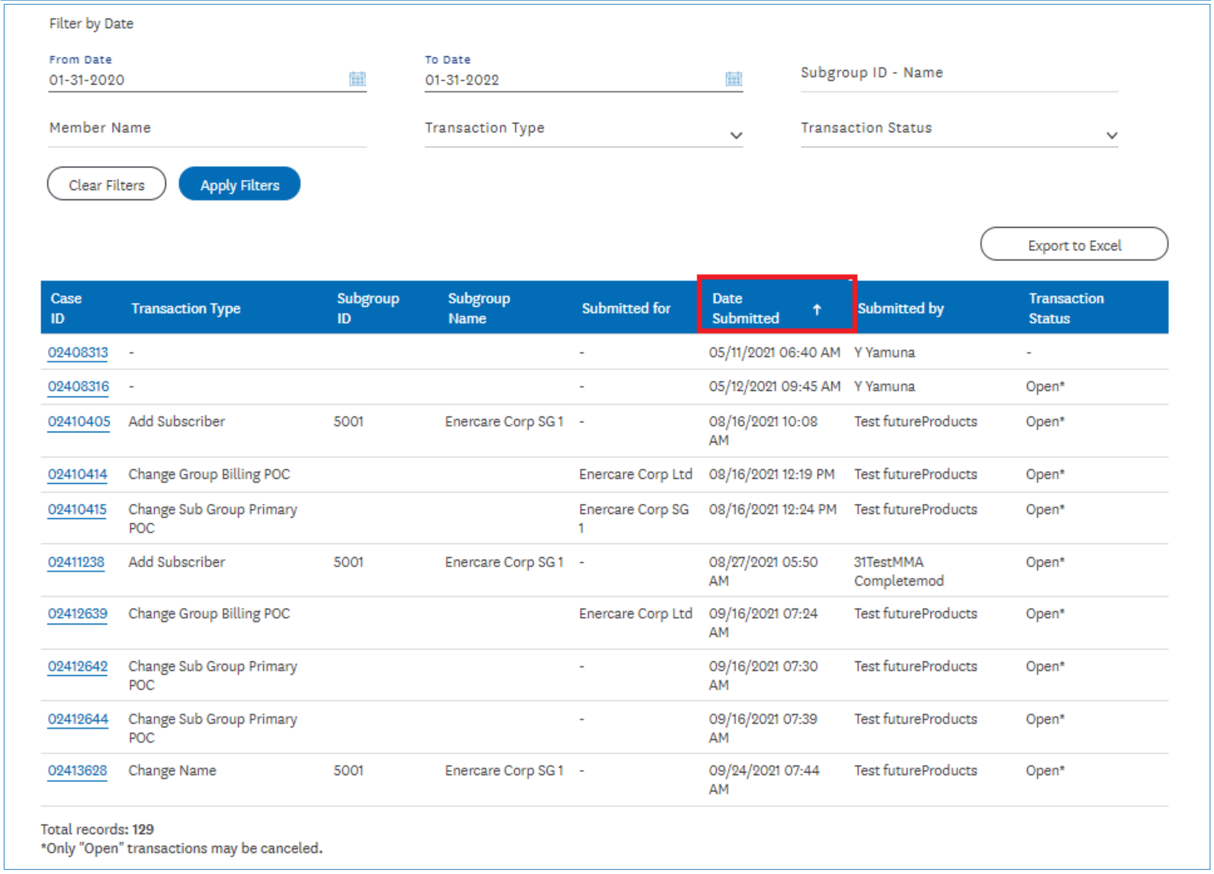
Note: The information displayed in the Transaction Details card will vary depending on the Transaction Type.



Step 7:

Return to the Transaction History page.

1. Click any column to sort the transaction history.



Filter by Date

From Date: 01-31-2020

To Date: 01-31-2022

Subgroup ID - Name

Member Name

Transaction Type

Transaction Status

Clear Filters | Apply Filters

Export to Excel

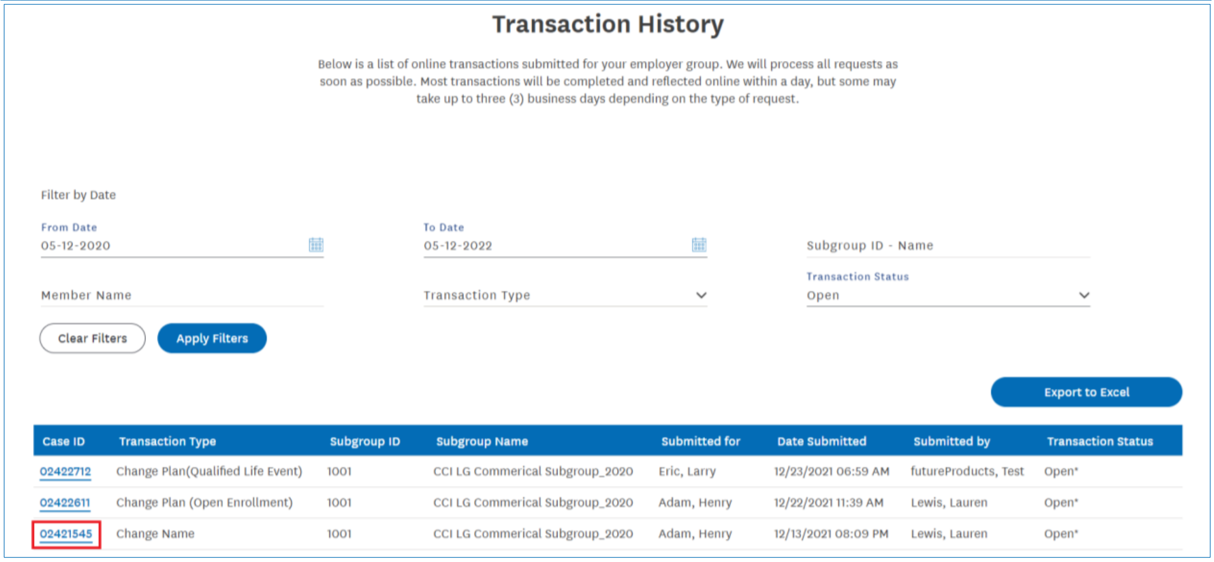
Case ID	Transaction Type	Subgroup ID	Subgroup Name	Submitted for	Date Submitted ↑	Submitted by	Transaction Status
02408313	-			-	05/11/2021 06:40 AM	Y Yamuna	-
02408316	-			-	05/12/2021 09:45 AM	Y Yamuna	Open*
02410405	Add Subscriber	5001	Enercare Corp SG 1	-	08/16/2021 10:08 AM	Test futureProducts	Open*
02410414	Change Group Billing POC			Enercare Corp Ltd	08/16/2021 12:19 PM	Test futureProducts	Open*
02410415	Change Sub Group Primary POC			Enercare Corp SG 1	08/16/2021 12:24 PM	Test futureProducts	Open*
02411238	Add Subscriber	5001	Enercare Corp SG 1	-	08/27/2021 05:50 AM	31TestMMA Completemod	Open*
02412639	Change Group Billing POC			Enercare Corp Ltd	09/16/2021 07:24 AM	Test futureProducts	Open*
02412642	Change Sub Group Primary POC			-	09/16/2021 07:30 AM	Test futureProducts	Open*
02412644	Change Sub Group Primary POC			-	09/16/2021 07:39 AM	Test futureProducts	Open*
02413628	Change Name	5001	Enercare Corp SG 1	-	09/24/2021 07:44 AM	Test futureProducts	Open*

Total records: 129

*Only "Open" transactions may be canceled.

Step 8:

1. (Optional) To cancel a transaction, click the **Case ID**.
   Note: Only *Open status transactions can be canceled.



Transaction History

Below is a list of online transactions submitted for your employer group. We will process all requests as soon as possible. Most transactions will be completed and reflected online within a day, but some may take up to three (3) business days depending on the type of request.

Filter by Date

From Date
05-12-2020

To Date
05-12-2022

Subgroup ID - Name

Member Name

Transaction Type

Transaction Status
Open

Clear Filters
Apply Filters

Export to Excel

Case ID	Transaction Type	Subgroup ID	Subgroup Name	Submitted for	Date Submitted	Submitted by	Transaction Status
02422712	Change Plan(Qualified Life Event)	1001	CCI LG Commerical Subgroup_2020	Eric, Larry	12/23/2021 06:59 AM	futureProducts, Test	Open*
02422611	Change Plan (Open Enrollment)	1001	CCI LG Commerical Subgroup_2020	Adam, Henry	12/22/2021 11:39 AM	Lewis, Lauren	Open*
02421545	Change Name	1001	CCI LG Commerical Subgroup_2020	Adam, Henry	12/13/2021 08:09 PM	Lewis, Lauren	Open*

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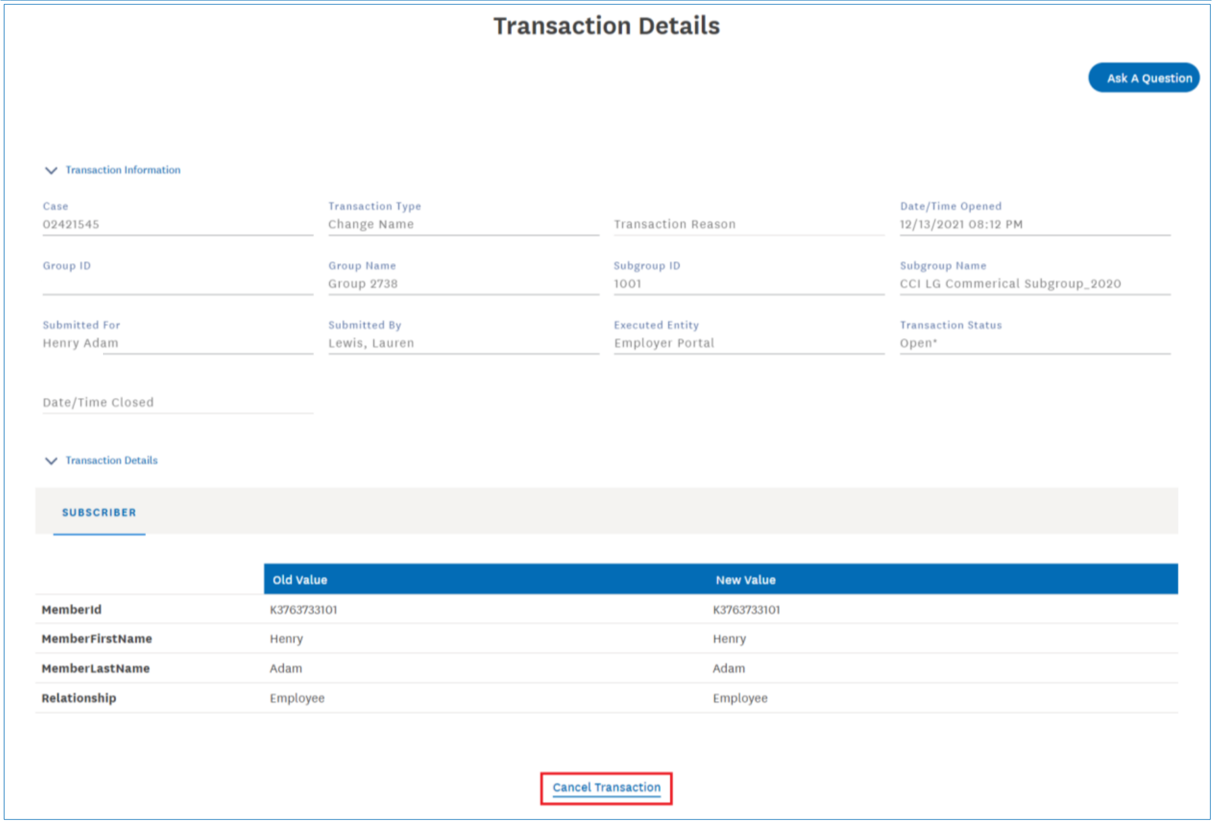
Step 9:

The Transaction Details display.

1. Click **Cancel Transaction**.

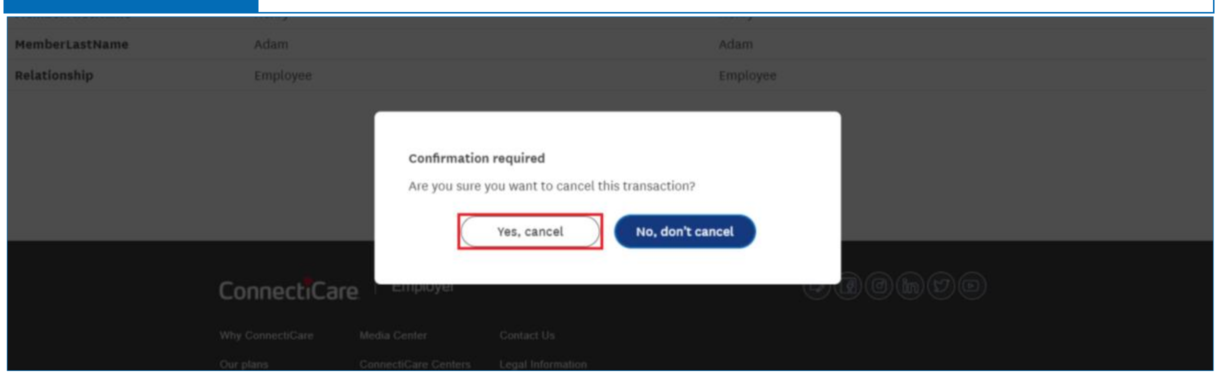


Step 10:

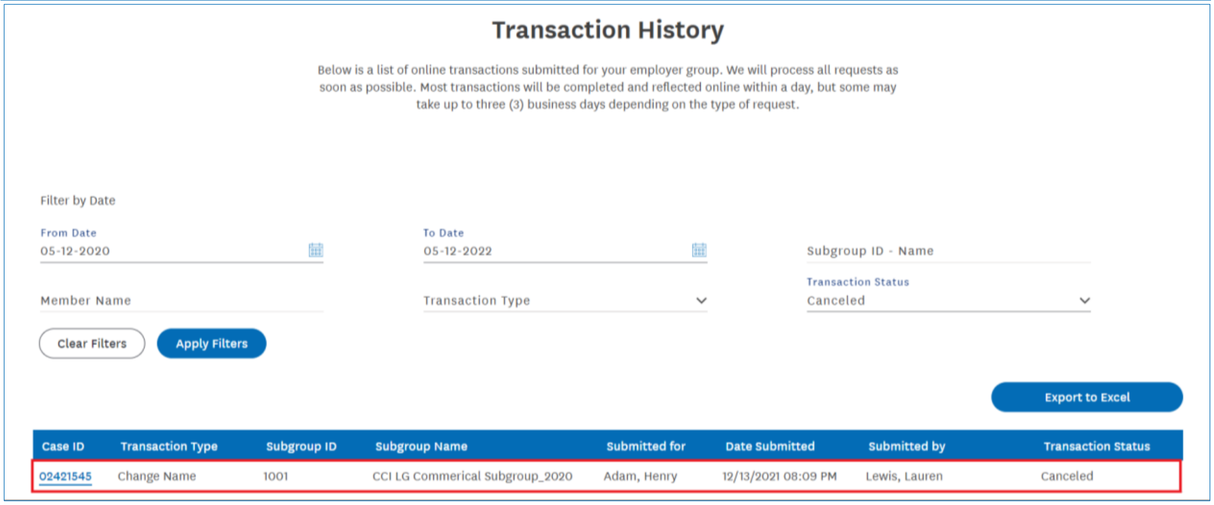
The Confirmation required screen displays.

1. Click **Yes, cancel**.

   Note: The Transaction Status will update to Canceled on the Transaction History page.



Step 11:	The Transaction History page displays. 1. View the canceled transaction in the transaction history table.



Transaction History

Below is a list of online transactions submitted for your employer group. We will process all requests as soon as possible. Most transactions will be completed and reflected online within a day, but some may take up to three (3) business days depending on the type of request.

Filter by Date

From Date 05-12-2020

To Date 05-12-2022

Subgroup ID - Name

Member Name

Transaction Type

Transaction Status Canceled

Clear Filters

Apply Filters

Export to Excel

Case ID	Transaction Type	Subgroup ID	Subgroup Name	Submitted for	Date Submitted	Submitted by	Transaction Status
02421545	Change Name	1001	CCI LG Commerical Subgroup_2020	Adam, Henry	12/13/2021 08:09 PM	Lewis, Lauren	Canceled

Transaction Types		
Add Subscriber	Request ID Card	Change Group Primary Point of Contact (POC)*
Change Plan (OE)*	Reinstate Subscriber	Change Group Billing POC*
Transfer	Reinstate Dependent	Change Subgroup Primary POC*
Add Dependent*	Change Relationship	Change Subgroup Billing POC*
Change Plan Qualifying Life Event (QLE)	Change Date of Birth	Billing – Payment
Change Marital Status*	Change Language/Ethnicity/Race	Billing – Auto Payment
Change Primary Care Provider (PCP)	Terminate Subscriber	Billing – Manage Account
Change Name*	Terminate Coverage	Request for Rebill
Change Subscriber Address	Terminate HSA/HRA	

Note: "*" indicates the transaction types that will be in "Open" status after user submits the transaction.

Transaction Completion Timing	
Up to 24 business hours for your request to be reflected online.	Change PCP Change Relationship Change DOB Change Language/Ethnicity/Race
Up to three (3) business days for your request to be reflected online.	Add Dependent Add Subscriber Change Group Billing POC Change Group Primary POC Change Marital Status Change Name Change Plan (OE) Change Plan (QLE) Change Subgroup Billing POC Change Subgroup Primary POC Change Subscriber Address Reinstate Dependent Reinstate Subscriber Request Rebill Terminate Coverage Terminate Dependent Terminate HSA/HRA Terminate Subscriber Transfer

Transaction Status	
Open	The default status when a Case ID is created.
In Progress	This is the status when the team is actually working on the request.
Completed	When the transaction is successfully completed or unsuccessfully completed.
Cancelled	When a transaction is cancelled. Only transactions in “Open” status can be cancelled.

Thank You