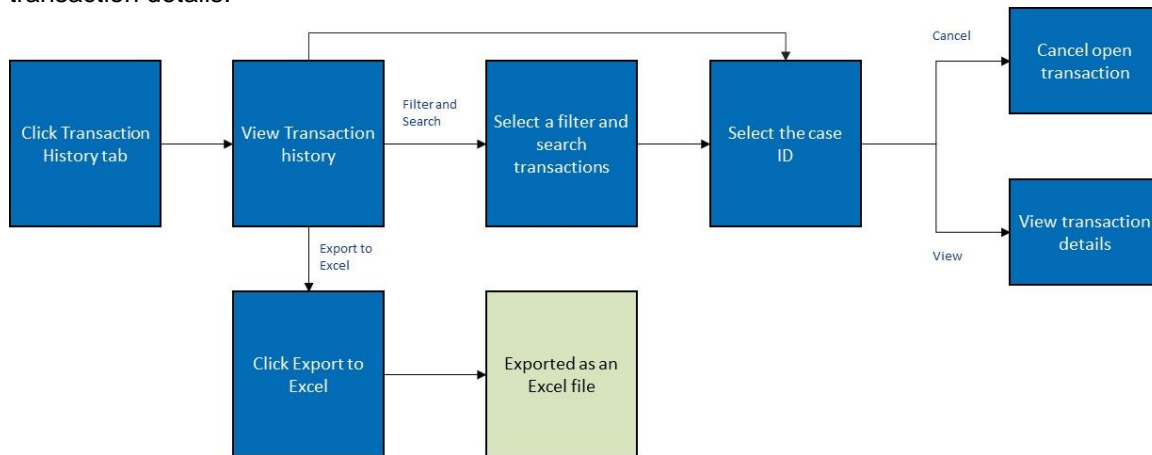


# View Transaction History & Transaction Details

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.

The screenshot shows the ConnectiCare web application interface. The navigation bar at the top includes links for Home, Roster Management, Billing, Transaction History (highlighted), Find Care, Secure Messaging, User Management, and Resources. The main content area features a welcome message for 'Enercare Corp Ltd' and several alert messages and news items.



## 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
<a href="#">02426331</a>	Request ID Card	1001		Bryan, Joe	01/27/2022 04:05 PM	Test futureProducts	Completed
<a href="#">02425322</a>	Terminate Dependent	1001		Anish, Theresa	01/19/2022 02:39 AM	Test futureProducts	Completed
<a href="#">02425052</a>	Add Subscriber	1001		-	01/17/2022 12:42 AM	Lauren Lewis	In Progress
<a href="#">02424301</a>	Request ID Card	1001		Bryan, Joe	01/10/2022 03:29 AM	Test futureProducts	Completed
<a href="#">02424221</a>	Terminate Coverage	1001		Adam, Henry	01/07/2022 03:50 PM	Lauren Lewis	In Progress
<a href="#">02423911</a>	Terminate Subscriber	1001		-	01/06/2022 02:20 AM	LG Primary Admin	In Progress
<a href="#">02423376</a>	Reinstate Dependent	1001		Patrick, Som	01/03/2022 09:53 AM	LG Primary Admin	In Progress
<a href="#">02423178</a>	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
<a href="#">02426331</a>	Request ID Card	1001		Bryan, Joe	01/27/2022 04:05 PM	Test futureProducts	Completed
<a href="#">02424301</a>	Request ID Card	1001		Bryan, Joe	01/10/2022 03:29 AM	Test futureProducts	Completed
<a href="#">02420645</a>	Request ID Card	1001		-	12/06/2021 10:28 AM	Test futureProducts	Completed
<a href="#">02420585</a>	Request ID Card	1001		-	12/06/2021 04:35 AM	Test futureProducts	Completed
<a href="#">02420584</a>	Request ID Card	1001		-	12/06/2021 04:30 AM	Test futureProducts	Completed
<a href="#">02420573</a>	Request ID Card	1001		-	12/06/2021 03:53 AM	Test futureProducts	Completed
<a href="#">02420572</a>	Request ID Card	1001		-	12/06/2021 03:50 AM	Test futureProducts	Completed
<a href="#">02420570</a>	Request ID Card	1001		-	12/06/2021 03:46 AM	Test futureProducts	Completed
<a href="#">02420569</a>	Request ID Card	1001		-	12/06/2021 03:37 AM	Test futureProducts	Completed
<a href="#">02420567</a>	Request ID Card	1001		-	12/06/2021 03:31 AM	Test futureProducts	Completed

Total records: 19

< 1 2 >



#### Step 4:

The filtered results open in an excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	Case ID	Transactio	Subgroup	Subgroup	Date Time Executed	F	Transaction Status														
2	02426331	Request IE	1001		01/27/20;	Bryan, Joe	Completed														
3	02424301	Request IE	1001		01/10/20;	Bryan, Joe	Completed														
4	02420645	Request IE	1001		12/06/20;	-	Completed														
5	02420585	Request IE	1001		12/06/20;	-	Completed														
6	02420584	Request IE	1001		12/06/20;	-	Completed														
7	02420573	Request IE	1001		12/06/20;	-	Completed														
8	02420572	Request IE	1001		12/06/20;	-	Completed														
9	02420570	Request IE	1001		12/06/20;	-	Completed														
10	02420569	Request IE	1001		12/06/20;	-	Completed														
11	02420567	Request IE	1001		12/06/20;	-	Completed														
12	02420565	Request IE	1001		12/06/20;	-	Completed														
13	02420563	Request IE	1001		12/06/20;	-	Completed														
14	02420561	Request IE	1001		12/06/20;	-	Completed														
15	02420559	Request IE	1001		12/06/20;	-	Completed														
16	02420558	Request IE	1001		12/06/20;	-	Completed														
17	02420553	Request IE	1001		12/06/20;	-	Completed														
18	02420545	Request IE	1001		12/06/20;	-	Completed														
19	02415952	Request IE	5001		10/22/20;	-	Completed														
20	02415858	Request IE	5001		10/21/20;	-	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
<a href="#">02408313</a>	-			-	05/11/2021 06:40 AM	Y Yamuna	-
<a href="#">02408316</a>	-			-	05/12/2021 09:45 AM	Y Yamuna	Open*
<a href="#">02410405</a>	Add Subscriber	5001	Enercare Corp SG 1	-	08/16/2021 10:08 AM	Test futureProducts	Open*
<a href="#">02410414</a>	Change Group Billing POC			Enercare Corp Ltd	08/16/2021 12:19 PM	Test futureProducts	Open*
<a href="#">02410415</a>	Change Sub Group Primary POC			Enercare Corp SG 1	08/16/2021 12:24 PM	Test futureProducts	Open*
<a href="#">02411238</a>	Add Subscriber	5001	Enercare Corp SG 1	-	08/27/2021 05:50 AM	31TestMMA Completemod	Open*
<a href="#">02412639</a>	Change Group Billing POC			Enercare Corp Ltd	09/16/2021 07:24 AM	Test futureProducts	Open*
<a href="#">02412642</a>	Change Sub Group Primary POC			-	09/16/2021 07:30 AM	Test futureProducts	Open*



## Step 6:

The Transaction Details page displays.

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

### Transaction Details

[Ask A Question](#)

#### Transaction Information

Case 02410405	Transaction Type Add Subscriber	Transaction Reason	Date/Time Opened 08/16/2021 10:08 AM
Group ID	Group Name Enercare Corp Ltd	Subgroup ID 5001	Subgroup Name Enercare Corp SG 1
Submitted For	Submitted By Test futureProducts	Executed Entity Employer Portal	Transaction Status Open*
Date/Time Closed			

### Transaction Details

Subscriber Details						⬆
Member First Name	Member Last Name	Gender	Birth Date	Marital Status	Relationship	
Street Address	Zip Code	State	City	County	Home Phone	
Mobile Phone Number	Email	SSN	Race	Ethnicity	Language	
Group ID	Subgroup ID	Class ID	Medical Plan ID	Dental Plan ID	Vision Plan ID	
Pharmacy Plan ID	Union Code	Status	Coverage Start Date	Coverage End Date	Hire Date	
PCP ID	PCP effective Date	PCP Name	Reason for PCP change			
Other Insurance						⬇



## 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
<a href="#">02408313</a>	-			-	05/11/2021 06:40 AM	Y Yamuna	-
<a href="#">02408316</a>	-			-	05/12/2021 09:45 AM	Y Yamuna	Open*
<a href="#">02410405</a>	Add Subscriber	5001	Enercare Corp SG 1	-	08/16/2021 10:08 AM	Test futureProducts	Open*
<a href="#">02410414</a>	Change Group Billing POC			Enercare Corp Ltd	08/16/2021 12:19 PM	Test futureProducts	Open*
<a href="#">02410415</a>	Change Sub Group Primary POC			Enercare Corp SG 1	08/16/2021 12:24 PM	Test futureProducts	Open*
<a href="#">02411238</a>	Add Subscriber	5001	Enercare Corp SG 1	-	08/27/2021 05:50 AM	31TestMMA Completemod	Open*
<a href="#">02412639</a>	Change Group Billing POC			Enercare Corp Ltd	09/16/2021 07:24 AM	Test futureProducts	Open*
<a href="#">02412642</a>	Change Sub Group Primary POC			-	09/16/2021 07:30 AM	Test futureProducts	Open*
<a href="#">02412644</a>	Change Sub Group Primary POC			-	09/16/2021 07:39 AM	Test futureProducts	Open*
<a href="#">02413628</a>	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:

- (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
<a href="#">02422712</a>	Change Plan(Qualified Life Event)	1001	CCI LG Commerical Subgroup_2020	Eric, Larry	12/23/2021 06:59 AM	futureProducts, Test	Open*
<a href="#">02422611</a>	Change Plan (Open Enrollment)	1001	CCI LG Commerical Subgroup_2020	Adam, Henry	12/22/2021 11:39 AM	Lewis, Lauren	Open*
<a href="#">02421545</a>	Change Name	1001	CCI LG Commerical Subgroup_2020	Adam, Henry	12/13/2021 08:09 PM	Lewis, Lauren	Open*





### Step 9:

The Transaction Details display.  
1. Click **Cancel Transaction**.

## Transaction Details

[Ask A Question](#)

▼ Transaction Information

Case O2421545	Transaction Type Change Name	Transaction Reason	Date/Time Opened 12/13/2021 08:12 PM
Group ID	Group Name Group 2738	Subgroup ID 1001	Subgroup Name CCI LG Commerical Subgroup_2020
Submitted For Henry Adam	Submitted By Lewis, Lauren	Executed Entity Employer Portal	Transaction Status Open*
Date/Time Closed			

▼ Transaction Details

**SUBSCRIBER**

	Old Value	New Value
Memberid	K3763733101	K3763733101
MemberFirstName	Henry	Henry
MemberLastName	Adam	Adam
Relationship	Employee	Employee

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.

MemberLastName Adam

Relationship Employee

Adam

Employee

Confirmation required

Are you sure you want to cancel this transaction?

Yes, cancel

No, don't cancel

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[ConnectiCare Centers](#)
[Local Information](#)



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