

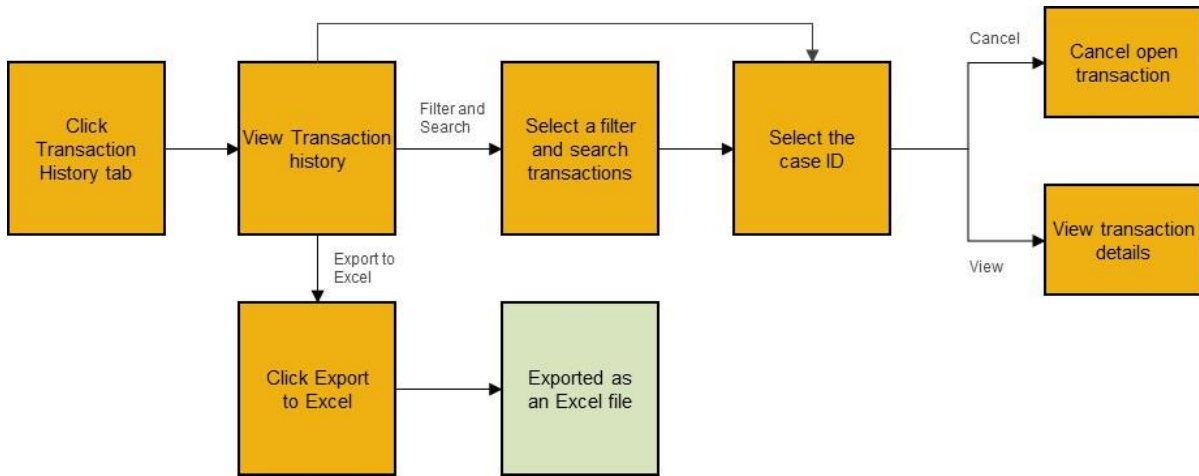
View Transaction History & Transaction Details

Quick Reference Guide (QRG)



Employer Portal – View Transaction History & Transaction Details

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 **EmblemHealth Home** page, click the **Transaction History** tab.

Note: Transaction History shows the status of all transactions in the last 24 months.

The screenshot shows the EmblemHealth portal interface. The navigation menu at the top includes Home, Roster Management, Billing, Transaction History (highlighted with a red box), Find Care, Secure Messaging, User Management, and Resources. Below the navigation menu is a banner image of a woman holding a mug. Below the banner are two global alert messages: "This is Global Alert message - All tenants" and "Applicable only for EH Portal". Below the alerts are three news cards: "EmblemHealth Wraps Up 2021 with Legacy of Community Service", "EmblemHealth Wraps Up 2021 with Legacy of Community Service", and "EmblemHealth Healthier for the Holidays Fair Kicks-Off in the Bronx". At the bottom, there is a "Group" section with a gear icon.

Employer Portal – View Transaction History & Transaction Details



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 canceled 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: 05-12-2020 To Date: 05-12-2022

Subgroup ID - Name: _____

Member Name: _____ Transaction Type: Transaction Type Transaction Status: _____

Case ID	Transaction Type	Subgroup ID	Subgroup Name	Submitted for	Date Submitted	Submitted by	Transaction Status
02434709	Change Name	1001	Pizza Boys SG 1	-	04/28/2022 10:28 PM	Lewis, Lauren	In Progress
02433388	Change Marital Status	1001	Pizza Boys SG 1	-	04/12/2022 02:29 AM		In Progress
02433385	Add Dependent	1001	Pizza Boys SG 1	-	04/12/2022 02:23 AM		In Progress
02432880	Terminate Subscriber	1001	Pizza Boys SG 1	-	04/05/2022 09:30 AM	Lewis, Lauren	In Progress
02429008	Change Plan(Qualified Life Event)	1001	Pizza Boys SG 1	-	02/17/2022 02:08 AM		In Progress
02429004	Change Plan (Open Enrollment)	1001	Pizza Boys SG 1	-	02/17/2022 01:59 AM		In Progress
02424721	Add Subscriber	1001	Pizza Boys SG 1	-	01/12/2022 02:51 AM	Lewis, Lauren	In Progress
02424587	Add Subscriber	1001	Pizza Boys SG 1	-	01/11/2022 08:50 AM	Lewis, Lauren	In Progress
02422049	Change Marital Status	1001	Pizza Boys SG 1	-	12/16/2021 07:10 PM	Lewis, Lauren	-
02421415	Request ID Card	1001	Pizza Boys SG 1	-	12/13/2021 12:09 AM	Lewis, Lauren	Completed

Total records: 27

Employer Portal – View Transaction History & Transaction Details



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: 05-12-2020 To Date: 05-12-2022 Subgroup ID - Name: _____

Member Name: _____ Transaction Type: Request ID Card Transaction Status: _____

Case ID	Transaction Type	Subgroup ID	Subgroup Name	Submitted for	Date Submitted	Submitted by	Transaction Status
02421415	Request ID Card	1001	Pizza Boys SG 1	-	12/13/2021 12:09 AM	Lewis, Lauren	Completed
02418955	Request ID Card	1001	Pizza Boys SG 1	-	11/22/2021 09:19 AM	Lewis, Lauren	Completed
02418765	Request ID Card	1001	Pizza Boys SG 1	-	11/19/2021 02:20 PM	Lewis, Lauren	Completed

Total records: 3



Step 4:

The filtered results open in an excel file.

Case ID	Transactic	Subgroup	Subgroup	Date Time Executed	Transaction Status
02421415	Request IC	1001	Pizza Boys	12/13/202-	Completed
02418955	Request IC	1001	Pizza Boys	11/22/202-	Completed
02418765	Request IC	1001	Pizza Boys	11/19/202-	Completed

Employer Portal – View Transaction History & Transaction Details



Step 5:

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

1. Click the **Case ID**.

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
02425672	-			Pizza Boys SG 1	01/20/2022 05:49 PM	Lauren Lewis	Open*
02424721	Add Subscriber	1001	Pizza Boys SG 1	-	01/12/2022 02:51 AM	Lauren Lewis	In Progress
02424587	Add Subscriber	1001	Pizza Boys SG 1	-	01/11/2022 08:50 AM	Lauren Lewis	In Progress
02422775	-			Pizza Boys SG 1	12/23/2021 07:30 PM	Lauren Lewis	Open*
02422609	Access Request Issue			-	12/22/2021 11:08 AM	Lauren Lewis	-
02422049	Change Marital Status	1001	Pizza Boys SG 1	-	12/16/2021 07:10 PM	Lauren Lewis	-
02421415	Request ID Card	1001	Pizza Boys SG 1	-	12/13/2021 12:09 AM	Lauren Lewis	Completed
02421390	-			-	12/10/2021 02:44 PM	Lauren Lewis	Open*
02421389	-			-	12/10/2021 02:43 PM	Lauren Lewis	-
02421388	-			Pizza Boys SG 1	12/10/2021 02:35 PM	Lauren Lewis	Open*

Total records: 35
*Only "Open" transactions may be canceled.

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Employer Portal – View Transaction History & Transaction Details



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

[Home](#) > [Transaction History](#) > [Transaction Details](#)

[Ask A Question](#)

Transaction Information

Case 02424721	Transaction Type Add Subscriber	Transaction Reason	Date/Time Opened 01/12/2022 02:01 AM
Group ID	Group Name Group 2427	Subgroup ID 1001	Subgroup Name Pizza Boys SG 1
Submitted For	Submitted By Lauren Lewis	Executed Entity Employer Portal	Transaction Status In Progress
Date/Time Closed			

Transaction Details

Subscriber Details

Member First Name first	Member Last Name	Gender Male	Birth Date 1992-01-17	Marital Status Married	Relationship Employee
Street Address 1502 Richmond Street	Zip Code 08203	State NJ	City Brigantine	County Atlantic	Home Phone
Mobile Phone Number	Email	SSN 555235576	Race White	Ethnicity	Language
Group ID	Subgroup ID 1001	Class ID 4001	Medical Plan ID MH002268	Dental Plan ID	Vision Plan ID
Pharmacy Plan ID	Union Code	Status COBRA	Coverage Start Date 2022-01-01	Coverage End Date	Hire Date 2022-01-01
PCP ID	PCP effective Date	PCP Name	Reason for PCP change		
Other Insurance					

Employer Portal – View Transaction History & Transaction Details



Step 7:

Return to the Transaction History page.

1. Click any column to sort the transaction history.

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
02425672	-			Pizza Boys SG 1	01/20/2022 05:49 PM	Lauren Lewis	Open*
02424721	Add Subscriber	1001	Pizza Boys SG 1	-	01/12/2022 02:51 AM	Lauren Lewis	In Progress
02424587	Add Subscriber	1001	Pizza Boys SG 1	-	01/11/2022 08:50 AM	Lauren Lewis	In Progress
02422775	-			Pizza Boys SG 1	12/23/2021 07:30 PM	Lauren Lewis	Open*
02422609	Access Request Issue			-	12/22/2021 11:08 AM	Lauren Lewis	-
02422049	Change Marital Status	1001	Pizza Boys SG 1	-	12/16/2021 07:10 PM	Lauren Lewis	-
02421415	Request ID Card	1001	Pizza Boys SG 1	-	12/13/2021 12:09 AM	Lauren Lewis	Completed
02421390	-			-	12/10/2021 02:44 PM	Lauren Lewis	Open*
02421389	-			-	12/10/2021 02:43 PM	Lauren Lewis	-
02421388	-			Pizza Boys SG 1	12/10/2021 02:35 PM	Lauren Lewis	Open*

Total records: 35
*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 To Date 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
02435418	Change Sub Group Primary POC	1001	Pizza Boys SG 1	Pizza Boys SG 1	05/13/2022 12:15 AM	Lewis, Lauren	Open*

Employer Portal – View Transaction History & Transaction Details



Step 9:

The Transaction Details page displays.

1. Click **Cancel Transaction**.

Transaction Details

[Home](#) > [Transaction History](#) > [Transaction Details](#)

[Ask A Question](#)

Transaction Information

Case 02435418	Transaction Type Change Sub Group Primary POC	Transaction Reason	Date/Time Opened 05/13/2022 12:05 AM
Group ID	Group Name Group 2427	Subgroup ID 1001	Subgroup Name Pizza Boys SG 1
Submitted For Pizza Boys SG 1	Submitted By Lewis, Lauren	Executed Entity Employer Portal	Transaction Status Open*
Date/Time Closed			

Transaction Details

CHANGE SUB GROUP PRIMARY POC

	Old Value	New Value
Group ID		
Group Name	Group 2427	Group 2427
Sub Group ID	1001	1001
Sub Group Name	Pizza Boys SG 1	Pizza Boys SG 1
POC Type	Primary Contact	Primary Contact
POC First Name	-	Joanne
POC Last Name	-	Miller
POC Contact No.	-	8716549812
Extension	-	-
POC Address	-	50 Gold Street New York NY 10019
City	-	New York
State	-	NY
Zip	-	10019
POC Email Address	-	jmiller@emblemhealth.com

[Cancel Transaction](#)

Employer Portal – View Transaction History & Transaction Details



Step 10:

The Confirmation required screen displays.

1. Click **Yes, cancel**.

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

The screenshot shows a confirmation dialog box with the following text: "Confirmation required. Are you sure you want to cancel this transaction?". There are two buttons: "Yes, cancel" (highlighted with a red box) and "No, don't cancel". The background shows a form with fields for POC Type, POC First Name, POC Last Name, POC Contact No., Extension, POC Address, City, State, Zip, and POC Email Address. The POC Name is Joanne Miller and the POC Contact No. is 8716549812. At the bottom of the dialog, there is a "Cancel Transaction" link.



Step 11:

The Transaction History page displays.

1. View the canceled transaction in the transaction history table.

The screenshot shows the "Transaction History" page. It includes a filter section with "Filter by Date" (From Date: 05-13-2020, To Date: 05-13-2022), "Member Name", "Transaction Type", and "Subgroup ID - Name". There are "Clear Filters" and "Apply Filters" buttons. An "Export to Excel" button is also present. Below the filters is a table with the following data:

Case ID	Transaction Type	Subgroup ID	Subgroup Name	Submitted for	Date Submitted	Submitted by	Transaction Status
02435418	Change Sub Group Primary POC	1001	Pizza Boys SG 1	Pizza Boys SG 1	05/13/2022 12:15 AM	Lewis, Lauren	Canceled

Total records: 1

Employer Portal – View Transaction History & Transaction Details



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 (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 Updated Bill
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.	<ul style="list-style-type: none"> Change PCP Change Relationship Change DOB Change Language/Ethnicity/Race
Up to three (3) business days for your request to be reflected online.	<ul style="list-style-type: none"> 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

Employer Portal – View Transaction History & Transaction Details

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 canceled.

Thank
You

