Transaction Report

The transaction report provides the main office contact with a list of all transactions performed by all users attached to their HPHConnect account. This report should be used during the annual account revalidation process or at any time the main office contact would like to know the way in which their Users are utilizing HPHConnect for providers.

Below are instructions for running the Transaction Report:

1. Log in to HPHConnect for Providers.

2. Click on "Reports" in the left navigation bar under the "Office Management" section. This will bring up the list of available reports.

3. Click on "Transaction Reports." This will open the transaction report screen where report criteria may be selected. Click on the "Legacy Reports" tab.

For more information, visit **https://hphcproviders.healthtrioconnect.com/**

4. Choose the report criteria.

Select a Report:
- Transaction Counts: Lists an aggregate of all transactions.
- Transaction Type Counts: Breaks out the transaction totals by transaction type.
- User Environment Statistics: Operating system of the user. (Not recommended for use by accounts; this is used by Harvard Pilgrim.)

Selection Criteria:
- Portal: Provider
- Transactions to Display: List of all available transactions. Harvard Pilgrim recommends using the default of "All Transactions."
- Access List: The name of the HPHConnect account.
- Users: The Users attached to the HPHConnect account. Harvard Pilgrim recommends using the default of "All Users".

Date Criteria:
- Start date/end date for the reporting period. Defaults to the previous month.

Output Criteria – Report Results by:
- Access List Type: i.e., by provider or practice
- Access List: i.e., by all provider entities in the account
- User: i.e., by transaction counts for each User on the account
- Specified Period: i.e., by transaction totals for the selected dates only.
- Specified Period/Daily Counts: i.e., by transaction totals for each day for the selected dates.
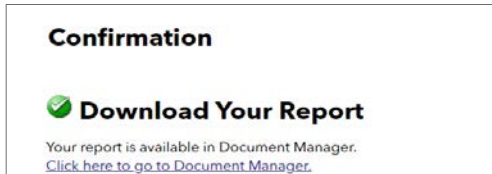- Year to Date: i.e., by the transaction totals by month for the current year.

Output Criteria – Download Format:
- Display (on screen display)
- Download delimited file
- Download MS Excel file
- Download PDF file

5. Once report criteria have been selected click on the "Generate" button.

6. View the report.

If	Then
Display results was selected	Report results will be displayed on the screen (see step 8)
One of the other options was selected	The report will be available from the file transfer agent (see step 7)

7. **a)** When the confirmation message displays, click on the link to access the "Document Manager."

Confirmation

✅ **Download Your Report**

Your report is available in Document Manager.
Click here to go to Document Manager.

b) At the File Transfer Agent – Inbox, click on "Download File."

Transaction Report Transaction Type for 09-01-2019 - 09-30-2019.xls | *(3183 KB)*   **Uploaded:** 09/30/2019

XLS   **Owned By:**   **Expires:** Does Not Expire

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c) Select "Open" to open and view the file, or "Save" to save the file to your computer.

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XLS

Transaction Report....xls ^

d) View of the report in MS Excel and proceed to step 8.

	A	B	C	D	E	F	G
1	CS_SET_ID	CS_SET_NAME	KEY_TYPE	LOGIN_ID	REPORT_COLUMN_NAME	TRANS_COUNT	USERNAME
2	1197	Provider Office	Practice	bichu1	Home [View]	2	User, Test
3	1197	Provider Office	Practice	bichu1	Member Roster Report	18	User, Test
4	1197	Provider Office	Practice	malea3	Active Medications	1	User2, Test
5	1197	Provider Office	Practice	malea3	Allergy: Summary	2	User2, Test
6	1197	Provider Office	Practice	malea3	CCR [create]	1	User2, Test
7	1197	Provider Office	Practice	malea3	Claim Detail	4	User2, Test

8. Review the report and determine if Users are performing the correct transactions. If the user accounts need to be modified or deleted, refer to *How to Add, Delete or Modify a User's Information*.