STEPS NECESSARY TO REQUEST AN ONLINE TRANSACTION HISTORY

1. To begin, click on ***Transaction Certificates & Forms***.
   a. The left menu pane will display several selections including the following:
      - *Transaction Certificates*
      - *Retirement Calculator*
      - *Additional Information Forms*
      - *Transaction History*
2. Click on ***Transaction History>ART Transactions***.
   a. This screen displays the "*ART Transactions"* page and will allow you to select the type of transaction as well as the status and Confirmation Number (ID) for that transaction, or set of transactions.
      i. At the bottom of the page, you can see a list of all transaction requests that have already been processed. If your transaction is listed in this section, then you can simply click on the "+" next to the details to view that transaction.
      ii. If your transaction is not displayed below, please continue.
3. Next, click the drop down menu next to "*Transactions to display:*"
   a. This will display a drop-down menu, which will list the types of transactions to display.
4. Next, click the drop down menu next to "*Transaction Status*:"
   a. This will display a drop-down menu, which will list the types of transaction status to display.
5. Next, click the drop down menu next to "*Show Account History From (MM/DD/YYYY)*"
   a. Upon date selection, you will be able to view all transactions in the system from the selected date forward.
6. Lastly, you may input a Confirmation Number (ID) into the box next to "*Confirmation*:" if you are researching a specific transaction by Confirmation Number.
7. Click ***Submit.***
8. If your desired transaction is not available, please double check the following:
   a. ***Transaction Summary***, to ensure your "*Type of Transaction*" is correct.
   b. ***Transaction Summary***, to ensure your "*Confirmation Number"* is correct.
9. Click **+** next to Details in order to view the status of the selected transaction(s).

There are several Status codes to denote:

-Additional Information: This field indicates there is additional information required for this transaction. Additional information will be sent to you after submitting a transaction request and is available through *"Transaction Certificates & Forms."* Please allow up to 2 hours after submitting your transaction request to receive these additional documents.

-Approved: This field identifies that a transaction has been approved. If a transaction has been approved a "TSA Approval Certificate" is available through "*Transaction Certificates & Forms."* Be sure to print and sign your "TSA Approval Certificate". Attach the completed "TSA Approval Certificate" to your provider paperwork and submit to your provider for processing.

-Denied: This field identifies a transaction that has been denied. Additional information will be sent to you through "*Transaction Certificates & Forms"* outlining the reason for your denial and giving specific instructions on resubmitting your transaction.

-Cancelled: This field identifies a transaction has been cancelled by the participant.

-Expired: This field identifies a transaction has expired after having no updated status or additional information for a period of 30 days.

-Pending: This field identifies a transaction that has been processed and no action has yet been taken to process.

There are several fields to denote:

-Transaction Summary: This field identifies the summary of results from the Online Transaction History request.

-Transaction Type: This field identifies the type of transaction processed against this account. This field is searchable by the drop-down menu "Transaction Status".

-Show Account History From (MM/DD/YYYY): This field identifies the date you wish to begin searching records for a particular transaction. This date must be entered in the format listed above as two digit month (08) "*August*", two digit day (24) and four digit year (2009).

-Confirmation #: This field identifies the Confirmation Number (ID) provided to you upon completing a transaction. This number individually identifies each transaction.