

😊 Job Aid: Transaction Types

Chapter 3: Client Processes

Section 8: Other Client Processes

Lesson: Transaction Types

Transaction Type	Code	More Information About Transaction Types
Prescreening	P	<ul style="list-style-type: none"> ◆ P displays during Prescreening.
New Enrollment	N	<ul style="list-style-type: none"> ◆ N displays during a new Enrollment. ◆ Automatically changes from N to C when all certification tabs are complete.
Recertification	R	<ul style="list-style-type: none"> ◆ After selecting “Recertification,” R is displayed. ◆ Automatically changes from R to C when all recertification tabs are complete. ◆ User can select “Recertification” within 30 days of the Certification End Date.
Display only	D	<ul style="list-style-type: none"> ◆ D displays after a participant has been terminated and the information saved. <p>See also Termination transaction type.</p>
Change	C	<ul style="list-style-type: none"> ◆ C displays for all active participants. ◆ Can make changes on a participant record in the “Enrollment” or “Certification” function when C displays.
Re-Activate	A	<ul style="list-style-type: none"> ◆ After selecting “Re-Activation,” A is displayed. ◆ Used for participants who have been terminated and are still within a current certification period. ◆ Automatically changes from A to C when record is saved.
Transfer-In Within Oregon	I	<ul style="list-style-type: none"> ◆ I displays with using the “Transfer-In Within Oregon” function. ◆ If the participant transferred-in was terminated before transferring and is still within a current certification, choose Re-activate after transferring.
Transfer-In Outside Oregon	O	<ul style="list-style-type: none"> ◆ O displays when using the “Transfer-In Outside Oregon” function.

Transaction Type	Code	More Information About Transaction Types
Terminate	T	<ul style="list-style-type: none"> ◆ After selecting “Termination,” T is displayed. ◆ The system automatically changes the T to D after exiting the record.
Reinstate	X	<ul style="list-style-type: none"> ◆ After selecting “Re-Instate,” X is displayed. ◆ Used for terminated participants more than 30 days past their certification end date. ◆ Used for women who are termed or within a current cert period who come in to be certified for a new pregnancy. ◆ Automatically changes from X to R when “Enrollment” tabs are complete. ◆ All certification tabs must be completed in order to issue benefits.

For help deciding which transaction type to select, use the following resources.

☺ See Job Aid “Choosing the Correct Transaction Type for Returning Woman with a New Pregnancy”

☺ See Job Aid “Choosing the Correct Transaction Type for Children”

☺ See the *Video Job Aids*:

Video: “Which Transaction Type for a Returning Woman with a New Pregnancy”
<https://youtu.be/qeNnCy4iZao>

Video: “Which Transaction Type to Use to Recertify a Terminated Child”
<https://youtu.be/HhXiUnIGZCM>