

J.P. Morgan Access[®]

USER GUIDE

Healthcare Link
Log On/Account Set Up

J.P.Morgan



Overview

Automate claims reimbursement and reduce administrative costs with our comprehensive Healthcare claims processing solution





Introduction to Healthcare Link

Medical insurers and providers share common goals when it comes to streamlining patient claims and reducing administrative costs. Healthcare Link aims to reduce the cost of handling healthcare claims by enabling payers to gain the full benefits of fast, highly efficient electronic transactions while affording providers a secure electronic data interchange (EDI) solution that complies with the standard mandated by the Health Insurance Portability and Accountability Act (HIPAA) of 1996

Healthcare Link routes payment instructions and remittance advices to providers and reconciles them. The system furnishes providers with all the relevant information in a format that is intended to easily post to their patient accounting system

Overview

Healthcare Link allows you to systematically capture, format, and post electronic and/or paper claims

- For electronic transactions, Healthcare Link enables receipt of electronic transmissions or extraction of files from insurers. The critical task of matching data (e.g., explanation of benefits (EOBs) data) to payments is performed automatically
- For paper-based remittances, Healthcare Link leverages J.P. Morgan's lockbox processing facilities equipped with imaging capture and data translation technology. Processing includes scanning payments and supporting materials – such as EOBs – and converting them to electronic images. Specialized Artificial Intelligence (AI) Enhanced Optical Character Recognition (OCR) software helps convert EOB images to electronic data files. Data is mapped to a variety of file formats, including EDI 835 or proprietary files, for automatic posting in your accounts receivable or practice management system. This technology is among the most advanced on the market for converting paper to electronic files

Healthcare Link enables you to streamline the payment processing cycle and realize greater savings through increased automation by matching payments and corresponding remittance advices (RAs). This process provides reconciled files for posting to your practice management system. Workflow tools enable efficient management of exceptions

Healthcare Link enables you to quickly access the data required to conduct follow-up activities such as patient inquiries, denial appeals, and secondary claims submissions



Digitize your healthcare payments

Effectively manage your receivables and facilitate the posting process all from a single platform with the new modernized J.P. Morgan Access® Healthcare Link experience

Upgrade your experience

Our new enhanced dashboard allows you to view current performance at-a-glance, improve reconciliation and workflow, all while giving you the power to self-serve. Modules are comprised of:



Search



Manual Posting



Reconciliation Manager



Enterprise Reconciliation Manager



Reports

Healthcare Link will provide you with an improved performance and more robust experience

What's new?

Now that Healthcare Link is integrated within J.P. Morgan Access®, you'll experience:

- Consistent view with multiple applications built-in
- Single user logins with appropriate multi-level security to help protect your privacy and preserve data authenticity
- Better management of your preferences and settings
- User Authentication to securely enroll and manage users. Once enrolled, Two Factor Authentication provides an added layer of security, ensuring only those approved can get in
- Self service options with a single gateway, allowing you to efficiently manage users

Logging On

Easily get set up by following a few simple steps





J.P.Morgan

J.P. Morgan Access®

Log On

User ID

Please enter your User ID and click Continue

1

Continue

[Forgot or Retrieve Password / User ID?](#)

[Where do I enter my Password?](#)

Client Resources

[Security Center](#)

[Regional Help Desk Phone Numbers](#)

Launch a browser to access the internet. Type the URL **https://access.jpmorgan.com** for the log on page

Enter your J.P. Morgan Access® User ID and select **Continue**

Looking for a payment

status? The Payment

Tracker can help!

[Click Here >](#)

Attention

Fraud Prevention Tips

Learn how evolving cybersecurity risks could affect your business, and be ready with the latest insights from J.P. Morgan. Visit the [Cybersecurity and Fraud Protection Resource Page](#).

Be vigilant when reviewing and confirming mail payment instructions, especially those containing new beneficiary banks, account names and account numbers.

Don't hesitate to call the provider of your beneficiary information if you receive any abnormal email requests involving payment instructions.

- If you are requested to initiate instructions quickly or due to an emergency, it may be a scam. Fraudsters create a sense of urgency to get you to act quickly.
- Regularly check your account activity for any suspicious transactions.
- If you receive a suspicious email regarding

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J.P. Morgan Access

Log On

User ID

[\[Show ID\]](#)

☐ I Confirm that my Site Phrase is:
SITE PHRASE

Password

Token Code (if required)

Log On

[I don't recognize this site phrase](#)[Forgot or Retrieve Password / User ID?](#)[What is token code?](#)

Check the box above the password field to confirm your **Site Phrase**

2

3

Then type your password (provided to you via email) in the Password field and select **Log On**

Self-service:

Forgot or Retrieve

Password / User ID

Attention

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- If you receive a suspicious email regarding

NOTE: The password sent in the email is the temporary password provided after logging into J.P. Morgan Access® for the first time. Once you go through the J.P. Morgan Access® user setup process, you will create your own password and that will become your password going forward

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Navigating to Healthcare Link

Once you're in, getting to Healthcare Link is easy





J.P.Morgan | Access

Search Search by account, beneficiary and more

Feedback Alerts Support Mathew Log Off

Home More Services

My Tasks View Create

Last Refreshed: 04/12/2021 04:51 PM

Global

New Alerts 3 >

Enhancements for J.P. Morgan Access – March 22, 2021

More Services

Please note that your J.P. Morgan Access preferences may not apply for these applications.

Application

Healthcare Link

Guides

User Guide - Healthcare Link

1 After logging in to J.P. Morgan Access®, click the **More Services** tab to navigate to Healthcare Link

2 Click on **Healthcare Link**

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HIPAA Disclaimer

Before we take you to our site, please read the following information:

This system contains Personal Information and Protected Health Information. Access to this system is restricted to authorized users with a valid user ID and password, in accordance with applicable business agreements and HIPAA minimum necessary obligations.

Unauthorized access is a violation of federal and state laws. By using our site, you give consent to monitoring and logging of access attempts and user activity, as permissible under those agreements.

CONFIRM

3

Once selected, J.P. Morgan Access® will open Healthcare Link in a new window

The HIPAA Disclaimer will appear the first time you log in to Healthcare Link. It will appear again when you log in after 30 days have elapsed. Click **Confirm** to continue

NOTE: When logging in for the first time, the Welcome popups will appear (after the HIPAA disclaimer), showcasing the user and the Admin / Enhanced user screenshots of the new experience. To navigate through each screen, click Next on the bottom right corner(s)

Dashboard

Navigate to virtually anywhere and view dynamic displays
directly from your Dashboard





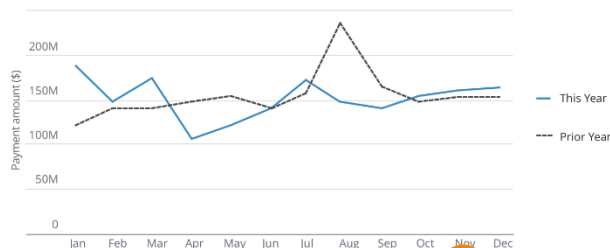
Views All Divisions

Custom Date Range 12 Jun 19 - 12 Jul 19

Home

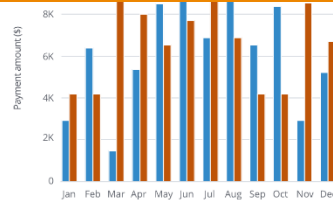
6/21/2018, 3:23 PM EST

Overall Payments Summary

[VIEW ALL PAYMENTS](#)

The Dashboard will display an Overall Payments Summary and a Deposits Overview for Treasury Users

Filter the data shown on the dashboard by **Division** or **Date Range**

[VIEW ACH PAYMENTS](#)[VIEW LOCKBOX PAYMENTS](#)

This Month's Total Amount

\$237,659,538.58

Lockbox \$2,783,827.35

ACH \$4,783,827.47

To view payments, click on the **View All Payments** button in the bottom of the Overall Payments Summary visualization

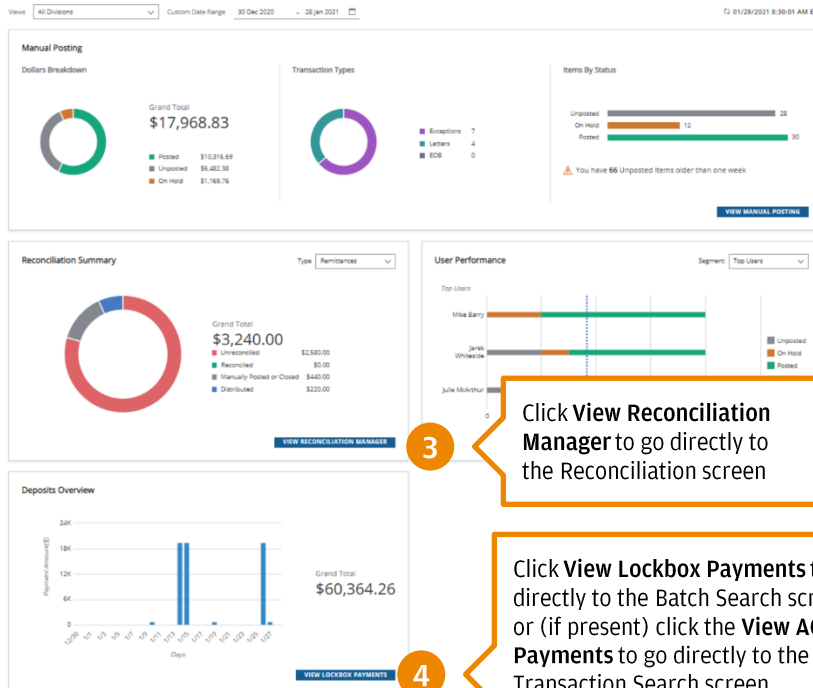
To view ACH or Lockbox specific payments, click **View ACH Payments** or **View Lockbox Payments** in the bottom of the Deposits Overview visualization



The Dashboard will display Manual Posting, Reconciliation, Deposits, and User Performance information for an Enhanced User with these assigned features

Filter the data shown on the dashboard by **Division** or **Date Range**

1



2

Click **View Manual Posting** to go directly to the Manual Posting screen

3

Click **View Reconciliation Manager** to go directly to the Reconciliation screen

4

Click **View Lockbox Payments** to go directly to the Batch Search screen or (if present) click the **View ACH Payments** to go directly to the Transaction Search screen

Profile & Preferences

Get set up in minutes





1

Click on the **My Profile** tab to view user information

2

My Account

My Profile My Preferences

User Information

First Name
JohnLast Name
SmithEmail
John.Smith@jpmorgan.com

Click the **Username** at the top of the screen to access the My Account page

Admin Information

First Name

Last Name

Email

Product Entitlements

Provider/Client Name

Demo Website Provider

By Division

Demo Website Division

3

View user Product Entitlements by Division by selecting the specific division name from the drop-down list

Division(s)

Demo Website Division

Product Entitlements for Demo Website Division

Manual Posting - Assigned

Batch Search

Transaction Search



1

My Account

My Profile

My Preferences

2

Click on the **My Preferences** tab to view the current Search preferences

Click the **Username** at the top of the screen to access the My Account page

Search

Preferred View Range

Last 30 Days



Preferred Divisions

All



Preferred Payers

All



3

Select the default range using the **Preferred View Range**, **Preferred Divisions** and/or **Preferred Payers**, from the drop-down menu(s) and click **Apply** to register the selection

RESET

APPLY

FAQs





FAQs

> **How will I log in, going forward?**

Log in to J.P. Morgan Access® via this URL, <https://access.jpmorgan.com>.

Click this link to view the login steps. Security Admins (SAs) will be required to use a soft token, a User ID and password.

> **Will my historical data be transferred over to the new UI?**

Yes, all the historical data will be available.

> **What is the retention period for images?**

The retention period will not change: Images will be retained for 10 years.

> **What can I expect to receive as part of the process of logging into J.P. Morgan Access®?**

- Existing J.P. Morgan Access® SAs and users will be able to log in via J.P. Morgan Access® using existing log in credentials.
- New J.P. Morgan Access® SAs and users will receive one-time automated emails on their migration date with a J.P. Morgan Access® User ID and temporary password. SAs will also receive a text message with soft token credentials.

> **How do I manage entitlements for users in J.P. Morgan Access®?**

For any J.P. Morgan Access® specific setups or questions, click on **Help** within the J.P. Morgan Access® portal, navigate to Administration, then reference the various user guides. The entire user guide can be downloaded via the upper right corner by clicking on Download User Guide.

> **What browser(s) can I leverage for Healthcare Link?**

Google Chrome, Mozilla Firefox, and Microsoft Edge. Healthcare Link will not be accessible through Safari and IE11.

> **How would I export data from a screen?**

Any view can be exported by selecting export on the top right of the screen(s). Output format will be an Excel spreadsheet.



FAQs

➤ **Where do I find the ACH Report, to reconcile between my bank deposits and my PAS?**

The ACH Report is part of the Deposit Detail Report, within the Reports module.

➤ **Why would I not see specific screens as shown in the User Guide, i.e. within the Dashboard or specific screens?**

Screens are based on Entitlements granted.

- An Enhanced User or a Treasury User can view the Dashboard. The widgets / graphs included in the dashboard and other screens available to users are contingent upon what screens the user has been granted entitlements to. An Enhanced User can assign items to other users.
- A Basic User can view work that is assigned.
- A Restricted Patient User can access Patient Search screens only.

➤ **Where do I find the file details for a distributed file, EPIC files and Image files? (Previously it was found in Search by Batch)**

The file name and distribution date associated with the Returned ERA, can be viewed via the Outbound File Report.

➤ **Where do I find the Lockbox Report, showing me all the files scanned and transferred from a lockbox into HCL?**

The Lockbox details are included in the Deposit Detail Report, within the Reports module.

➤ **Where do I find all the Incoming 835 remittance files, and other files we send to JPMC?**

The Inbound Files (the files clients send to JPMC) are found within the Reports module. You can view all Inbound EOBs, PAS and BAI files at a glance to see what came in and when.

➤ **Where do I find the 835 payment details, 835 splits and the Outbound files?**

The Outbound Files are found within the Reports module. You can view all files that are “outbound” to verify that HCL has process the Inbound file and have reconciled payments and remittances.

Glossary





Glossary

This glossary provides users of Healthcare Link with a common understanding of the terms and acronyms used in daily operations.

Term/Acronym	Description
ACH	Automated Clearing House. A check clearing facility operated for the convenience of the banks in a particular region, generally through the regional Federal Reserve bank. Automated clearing houses electronically process interbank credits and debits. They may also handle the electronic transfer of government securities and client services such as the automatic deposit of clients' wages, direct deposit of Social Security checks, and pre-authorized payments of bills by banks
Account Number	Number encoded on checks (or other documents) to identify the holder of the bank account number
Artificial Intelligence (AI)	Machine learning is an application of artificial intelligence that provides systems the ability to learn without being explicitly programmed. JPMorgan Chase applies AI to enhance the Optical Character Recognition (OCR) engine for the most advanced paper EOB conversion technology currently available
Assignee	The person in which the item is assigned to. Assignee name is displayed
Assigned Date	The date the task is assigned by the Enhanced User
Assigned By	The name of the individual who assigned the item
Batch	Number of items (i.e., scanned images in the lockbox) processed at one time to form a bundle of work
Batch Amount	The dollar amount of all checks within the batch
Batch Date	The date on which the batch was created by the J.P. Morgan lockbox or image vendor
Batch/Deposit Date	The date on which the batch was created by the J.P. Morgan lockbox or image vendor OR the date on which the check was deposited
Batch Number	The number assigned to a batch by J.P. Morgan
Check Date	The date on which the check was written
Claim Count	The number of processed claims. Only applicable for EOB conversion clients
Credit	Payment received by the provider from the payer / insurer



Glossary

This glossary provides users of Healthcare Link with a common understanding of the terms and acronyms used in daily operations.

Term/Acronym	Description
DDA	Demand Deposit Account. Checking account where funds can be withdrawn at any time without prior notice to the bank
Deposit Date	Date on which the check was deposited
Division	A particular site or department within the provider's organization
Due Date	In Manual Posting, when an Enhanced User assigns an item, they can choose to have a due date for when the item needs to be posted
EDI	Electronic Data Interchange (EDI). The electronic exchange of routine business transactions. These transactions include such documents as purchase orders, invoices, inquiries, planning, acknowledgment, pricing, order status, scheduling, test results, shipping and receiving, payments, and financial reporting. EDI permits hundreds of unrelated companies to communicate and process business transactions electronically
EFT	Electronic Funds Transfer. The transfer of money initiated through electronic terminal, automated teller machine, computer, telephone, or magnetic tape
EOB	Explanation Of Benefits Document specifying the outcome of a claim submitted to an insurer by a provider. The document explains why certain charges were discounted, what was covered by insurance, why a claim was denied, etc. The insurer/payer sends the document to the provider and the patient. EOBs are typically paper documents but can be sent electronically by the insurer to the provider
DDA	Demand Deposit Account. Checking account where funds can be withdrawn at any time without prior notice to the bank
Deposit Date	Date on which the check was deposited
Division	A particular site or department within the provider's organization
Due Date	In Manual Posting, when an Enhanced User assigns an item, they can choose to have a due date for when the item needs to be posted
EDI	Electronic Data Interchange (EDI). The electronic exchange of routine business transactions. These transactions include such documents as purchase orders, invoices, inquiries, planning, acknowledgment, pricing, order status, scheduling, test results, shipping and receiving, payments, and financial reporting. EDI permits hundreds of unrelated companies to communicate and process business transactions electronically



Glossary

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Term/Acronym	Description
EFT	Electronic Funds Transfer. The transfer of money initiated through electronic terminal, automated teller machine, computer, telephone, or magnetic tape
EOB	Explanation Of Benefits Document specifying the outcome of a claim submitted to an insurer by a provider. The document explains why certain charges were discounted, what was covered by insurance, why a claim was denied, etc. The insurer/payer sends the document to the provider and the patient. EOBs are typically paper documents but can be sent electronically by the insurer to the provider
ERA	Electronic Remittance Advice. The name (given by insurers) to the electronic file, which gets posted to the provider
File Name	The 835-file name
HIPAA	Health Insurance Portability and Accountability Act of 1996
Items Posted	When viewing by batch, a user can see total items in the batch and number of items posted within the batch
Latest Notes	The most recent notes the user entered while working on the assigned task
Lockbox	A receivables service that includes collection of checks from a designated P.O. Box, remittance, and processing of payments. Lockboxes are also known as sub-accounts, as they are linked to a DDA for pricing and billing purposes
Lockbox Number	The number of the J.P. Morgan lockbox used to process the paper documents (i.e., remittance advice, explanation of benefits) from the insurer
Modifier	A code used to further define a medical procedure or service
Negotiated Charge	The amount the insurer has negotiated to pay the provider for a particular service/procedure
OCR	Optical Character Recognition. Refers to the printed scan line of information on the bottom line of documents that is read with an optical reader
PAS	Patient Accounting System
Patient Account Number	A unique number associated with the patient



Glossary

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Term/Acronym	Description
Patient Responsibility	The amount the patient must pay the provider, as specified on the contract between the patient and the payer / insurer
Payable Amount	The amount payable by the payer / insurer, i.e., the negotiated charge less any deductions such as patient responsibility, company payment, secondary payer / insurer amount, etc.
Payer	The name of the insurer.
Payment Number	A written order to a bank to pay another party the amount specified from funds on deposit
Payment Amount	The amount of the payment in dollars
Post(ed) Date	The date on which a batch, check, or transaction was posted.
Returned ERA	835 files returned to client
Search Criteria Pane	On some screens (e.g., the <i>Image Search by Check, Patient, Batch, or Lockbox (Tree View)</i> screens), the <i>Reports</i> pane expands to hide the <i>Search Criteria</i> (and <i>Alerts</i>) panes to increase the space available for viewing the report data. To re-display the <i>Search Criteria</i> pane, re-size the panes by clicking the small arrow on the dividing line to expand the pane
Site	The location of a particular division or department within the provider's organization
Total Items	Total Items in batch

Contacting Technical Support

J.P. Morgan Client Services & Technical Support representatives are ready to assist you with all your technical and general inquiries. Support telephone numbers appear on the J.P. Morgan Access® login screen under Client Resources. The Regional Help Desk Phone Numbers are listed

For issues logging into J.P. Morgan Access®, please contact the Solutions Center at 866-872-3321 and select Menu Option 1. For all other Healthcare Link inquiries, please contact your Client Service Representative

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