

J.P. Morgan Access[®]

USER GUIDE

Healthcare Link
Manual Posting

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

Manual Posting

If images are converted to 835, the exceptions created will be available in the Manual Posting queue for assignment. If images are not converted to 835, all lockbox images will be available in manual posting. From this work queue, you can view the images and key the data into your own accounts receivable or practice management system.

The manual posting work queue enables an Enhanced User/Admin to review and/or assign work to individual users by batch or check. Once assigned, the transactions are added to the specified user's work queue.

Alternatively, where implemented, the provider can opt for the Random Posting option whereby the workload is not assigned to any specific user but is handled by users accessing a shared work list.

Notes can be added to the transactions during processing to facilitate communication and research efforts.

User Screens

Workflows can be assigned to specific users and once completed are tracked for auditing and reporting. Statistics of workflow performance can be viewed against target date assigned and intended due dates.



Manual Posting Assigned vs. Random Posting

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Search **Manual Posting** Reconciliation U

Summary
Assigned Items Within Last 60 Days

Items Unposted 8

The **Summary** section provides a clear visual display of the total assigned items by status and dollar amount

Total Images to Review 25

Total Dollars Unposted / On Hold \$7,066.93

Assigned Posting Items

04/12/2021 5:10:21 PM ET EXPORT

View By Item UNPOSTED & ON HOLD POSTED FILTERS

<input type="checkbox"/>	Status	Assigned Date	Batch Date	Lockbox	Batch	Division	Payer	Payment Number	Payment Amount	Images	Transaction Classification	Details
<input type="checkbox"/>	Unposted	03/23/2021	03/22/2021	100001	7116	Demo We...	ANA UBI C...		\$40.87	3	—	VIEW
<input type="checkbox"/>	Unposted	03/23/2021	03/22/2021	100001	7116	Demo We...	ECHO - EL...		\$372.96	3	—	VIEW
<input checked="" type="checkbox"/>	Unposted	03/23/2021	03/22/2021	100001	7116	Demo We...	Unknown ...		\$138.39	3	—	VIEW
<input type="checkbox"/>	Unposted	03/23/2021	03/22/2021	100001	7116	Demo We...	Unknown ...		\$53.41	5	—	VIEW
<input type="checkbox"/>	Unposted	03/23/2021	03/22/2021	100001	7116	Demo We...	Unknown ...		\$138.99	5	—	VIEW
<input type="checkbox"/>	Unposted	03/23/2021	03/22/2021	100001	7116	Demo We...	Unknown ...		\$94.47	2	—	VIEW
<input type="checkbox"/>	Unposted	03/23/2021	03/22/2021	100001	7116	Demo We...	Unknown ...		\$1,507.84	3	—	VIEW
<input type="checkbox"/>	Unposted	03/22/2021	03/22/2021	100001			st Pay		\$4,720.00	1	—	VIEW

Page Size 25 1 to 8 of 8 Page 1 of 1

POST PLACE ON HOLD ADD NOTE

Click **Export** link to save a copy of the Assigned Items table to an Excel® spreadsheet

Click **View** to see details and action items associated with an Assigned Item

Check the box next to an Assigned Item to enable the Action buttons:

- Post
- Place On Hold
- Add Note

Manual Posting Assigned vs. Random Posting

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Search **Manual Posting** Reconciliation User Management

All Assigned Batches > Batch Details > Item Details

Batch Details

Batch Date	Lockbox	Batch	Division	Assigned Amount
03/22/2021	100001	7116	Demo Website Division	\$2,591.78

Item Details

Payer	Payment Number	Payment Amount
ANA UBI Claims		\$40.87

Images (3) History (12 Notes)

1 The Batch and Item Details are displayed at the top of the screen

2 Scanned images associated with the item can be selected and viewed

3 An image can be annotated for further detail using the tools provided

4 An image can be expanded into a separate browser window or downloaded as a PDF file

5 Click **History** tab to view the full history of the selected transaction

6 To return to the main screen, select **Batch Details, All Assigned Batches, or Manual Posting** on the main menu

Annotation Tools: T [tools] CLEAR ALL

POST PLACE ON HOLD ADD NOTE

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Manual Posting **Assigned vs. Random Posting**

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Mike B. ▾ ? Help ↗ Log Off

Search
Manual Posting
Reconciliation
User Management

Summary
Assigned Items Within Last 60 Days

Items Unposted

8

Items On Hold

0

Total Images to Review

25

Total Dollars Unposted / On Hold

\$7,066.93

Assigned Posting Items

View By Item ▾

UNPOSTED & ON HOLD POSTED

▽ FILTERS

1

<input type="checkbox"/>	Status	Assigned Date	Batch Date	Lockbox	Batch	Division													
<input type="checkbox"/>	Unposted	03/23/2021	03/22/2021	100001	7116	Demo We...													
<input type="checkbox"/>	Unposted	03/23/2021	03/22/2021	100001	7116	Demo We...													
<input type="checkbox"/>	Unposted	03/23/2021	03/22/2021	100001	7116	Demo We...													
<input type="checkbox"/>	Unposted	03/23/2021	03/22/2021	100001	7116	Demo We...													
<input type="checkbox"/>	Unposted	03/23/2021	03/22/2021	100001	7116	Demo We...													
<input type="checkbox"/>	Unposted	03/23/2021	03/22/2021	100001	7116	Demo We...	Unknown ...	\$94.47	2	—	—	—	—	—	—	—	—	—	VIEW
<input type="checkbox"/>	Unposted	03/23/2021	03/22/2021	100001	7116	Demo We...	Unknown ...	\$1,507.84	3	—	—	—	—	—	—	—	—	—	VIEW
<input type="checkbox"/>	Unposted	03/22/2021	03/22/2021	100001	69	Demo We...	Patient Pay	\$4,720.00	1	—	—	—	—	—	—	—	—	—	VIEW

Page Size 25 ▾

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POST PLACE ON HOLD ADD NOTE

A user working with a division set up for **Assigned Items** will see a table displaying all items assigned to the current user. An item can be selected and either posted or placed on hold. A note can be added to any item selected

Alternatively, a division can be set up so that items are assigned randomly to a user from a common pool of items requiring posting

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Search Manual Posting Reconciliation User Management

Mike B. Help Log Off

Your Posting Queue
Summary of your Unposted & On Hold Items

2

Your Posting Queue displays a summary of information about the items remaining to be posted

Items Pending	Items On Hold	Total Dollars Unposted / On Hold	Total Images to Review
0	2	\$1,576.93	7

Division's Queue
Post by a particular Division by filtering on the right

All

3

The Division's Queue displays Total Dollars Unposted for the divisions selected in the drop-down box (All selected by default)

Total Items Unposted	Total Dollars Unposted
33	\$5,624.14

Random Posting Items

UNPOSTED ON HOLD POSTED

04/12/2021 5:14:51 PM ET EXPORT

Search Items

Your Unposted Queue is Currently Empty
Initiate your queue by clicking Get Started below.

4

Select **Get Started** to populate the Random Posting table with items from the Division selected in the drop-down menu in the Division's Queue

GET STARTED

Enhanced User Screens

Administrator level access provides transparency of all work performed by team members. Tracking mechanism for assigned and unassigned items ensures no transactions are left behind.



Manual Posting Summary Assign / Unassign Place On Hold Post Add Note Batch Manual Posting

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Mike B. ▾ ? Help ↗ Log Off

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Manual Posting Summary

Items Total \$1,419,646.63 Unposted \$332,802.13 On Hold \$0.00 Posted \$1,086,844.50

Posting Items

11/22/2021 9:18 AM ET EXPORT

View By Item ▾ **UNPOSTED & ON HOLD (500)** POSTED (957) ALL (1.4K+) ▾ FILTERS

Showing Last 30 Days Search Items

<input type="checkbox"/>	Status	Assignee	Batch Date	Lockbox	Batch	Division	Payer	Captured Payer	Payment Number	Payment Amount	Images	Transaction Classification	Details
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755591	908					\$246.98	2	—	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755591	908					\$106.25	2	—	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755591	908					\$17.01	2	—	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755591	908					\$82.06	3	—	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	904					\$0.00	23	—	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	2	Letter	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	2	—	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	7	—	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	10	—	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	4	Letter	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	7	Letter	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	4	Letter	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	6	Letter	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	6	Letter	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	6	Letter	VIEW

Page Size: 25 ▾

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ASSIGN PLACE ON HOLD POST UNASSIGN ADD NOTE

View the Status of your item or batch

Choose whether to view the table by Unposted & On Hold, Posted, or All

Reference the Assignee column to view whether an item is Assigned and to which user

See more details for an item or batch by clicking View

Search **Manual Posting** Reconciliation User Management

Click **Filters** button to open the Filter pane on the left side of the table

Select the values or value ranges for the items in the **Filter** pane

Click **Apply** button to register those values in the search table and close the Filter pane. Click the **Clear** button to remove the values entered from the items in the Filter pane

Enter any value in the **Search Items** field to filter the table by that value

Click on the three dots and then the filter icon in any of the columns to directly apply a value or range of values to filter the column (and therefore the search table)

Manual Posting Summary

Items Total \$1,419,646.63 Unposted \$332,802.13 On Hold \$0.00 Posted \$1,086,844.50

Filter

Batch View Range

Last 30 Days

Batch Date Range

Start Date End Date

Division

Selecting any division will trigger the Assignee dropdown to clear

Assignee

Payer

Transaction Classification

Selecting any Transaction Classification will trigger Exceptions Classification dropdown to clear and selections that don't contain 'Letter' will disable the Correspondence Category dropdown.

Exceptions Classification

CLEAR

APPLY

ASSIGN

PLACE ON HOLD

POST

UNASSIGN

ADD NOTE

Posting Items

View By Item

UNPOSTED & ON HOLD (500)

POSTED (957)

ALL (1.4K+)

FILTERS

Showing Last 30 Days

Search Items

<input type="checkbox"/>	Status	Assignee	Batch Date	Lockbox	Batch	Division	Payer	Captured Payer	Payment Number	Payment Amount	Details
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755591	908					\$246.98	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755591	908					\$106.25	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755591	908					\$17.01	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755591	908					\$82.06	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	904					\$0.00	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	VIEW
<input type="checkbox"/>	Unposted	Unassigned	11/19/2021	9755590	903					\$0.00	VIEW

Page Size 25

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1 Select **Export** to export all displayed items

Data can be exported into an Excel® spreadsheet

1	2	3	4	5	6	7	8	9	10	11	12	13
J.P.Morgan Healthcare Link												
Exported Module:												
Manual Posting (Admin): Item View												
Applied Filters:												
Selected Tab: Unposted & On Hold View Date Range: Last 30 Days												
Status	Assignee	Batch Date	Lockbox	Batch	Division							
UNPOSTED	Mike B.	03/22/2021	100001	7116	Demo Website							
UNPOSTED	Mike B.	03/22/2021	100001	7116	Demo Website							
UNPOSTED	Mike B.	03/22/2021	100001	7116	Demo Website							
UNPOSTED	Mike B.	03/22/2021	100001	7116	Demo Website							
UNPOSTED	Mike B.	03/22/2021	100001	7116	Demo Website							

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Search Manual Posting Reconciliation User Management

Manual Posting Summary

Posting Items

View By Item UNPOSTED & ON HOLD

1 Select an item to assign to a user from the Manual Posting Items table

2 Click on the **Assign** link to open the Assign Item window

3 In the Assign Item window sort or filter the list of Posting Users as needed

4 Select a user from the list to assign the item

5 Select a Due Date from the calendar selector
NOTE: This is an optional field

6 Add a Note if needed

7 Click the **Assign** button to assign the item or items selected in the Manual Posting Items table to the user selected in the Assign Item window. Click the **Clear** link to unselect any user and reset the due date

8 Click the **Cancel** button to return to the Manual Posting Items table without assigning the item

Workflow can be managed when staff is on leave by re-assigning to another team member with auditable tracking.

It is not necessary to **UNASSIGN** an item before re-**ASSIGNING** it to another team member.

Items Total: \$906,490.54 Unassigned: \$321,111.11 On Hold: \$0.00

Posting User	Unposted Items	Items On Hold	Total Images
Adam [name]	0	0	0
Aditya [name]	0	0	0
Akanksha [name]	0	0	0
Albert [name]	0	0	0
Alberto [name]	0	0	0
Alex [name]	0	0	0
Andrew [name]	0	0	0

Select Assignee from list below: *

Select Due Date: MM/DD/YYYY

Notes: 250 Characters Max

CANCEL CLEAR ASSIGN

Page Size: 25

ASSIGN PLACE ON HOLD POST UNASSIGN ADD NOTE 1 Row Selected

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To unassign,
choose a
record to
unassign

1

Unassign Item

WARNING: Your selection includes Items that are already assigned. Please review all selected items before overriding other users' work.

Leave a note: (Optional)

Enter notes

250 Characters Max

CANCEL

CLEAR

UNASSIGN

3

A pop-up window provides the option to add a note. Then select **Unassign**

NOTE: It is not necessary to UNASSIGN an item before re-ASSIGNING it to another team member.

2

Select the **Unassign** action button

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Search Manual Posting Reconciliation User Management

Manual Posting Summary

Items Total: \$906,490.54 | Unposted: \$324,450.98 | On Hold: \$580,286.87 | Posted: \$1,752.69

Posting Items

View By Item: UNPOSTED & ON HOLD (763) POSTED (2) ALL (765) FILTERS

Showing Last 30 Days Search Items

Transaction Classification Correspondence Category Details

Place Item On Hold

Leave a note: (Optional)

Enter notes

250 Characters Max

CANCEL CLEAR PLACE ON HOLD

To place an item on hold, choose a record to place on hold

Select the Place On Hold action button. A pop-up window provides the option to add a note. Then select Place On Hold

1 2

1 to 25 of 763 Page 1 of 31

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Search **Manual Posting** Reconciliation User Management

Mike B. Help Log Off

Manual Posting Summary

Items Total	Unposted	On Hold	Posted
\$906,490.54	\$324,450.98	\$580,286.87	\$1,752.69

04/12/2021 5:19:47 PM ET EXPORT

Search Items

Transaction Classification	Correspondence Category	Details
—	—	VIEW
—	—	VIEW
—	—	VIEW
—	—	VIEW
—	—	VIEW
—	—	VIEW
—	—	VIEW

NOTE: Assign Items by determining the workload for each user by viewing the status of items in their queue

To Post an item, select **Post** and when a pop-up appears, you have the option to add a note. After adding a note, select **Post**

If Posted is selected, the only actions applicable are **Unpost** and **Add Note**

1

To post an item, choose a record or records to post from the Manual Posting Item table

Post Item

Leave a note: (Optional)

Enter notes

250 Characters Max

CANCEL CLEAR **POST**

2

Select the POST action button. A pop-up window provides the option to add a note. Then select **POST**

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Assign Place On Hold **Post** Unassign Add Note 1 Row Selected

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Search Manual Posting Reconciliation User Management

Manual Posting Summary

Items Total: \$906,490.54 | Unposted: \$324,450.98 | On Hold: \$580,286.87 | Posted: \$1,752.69

Posting Items

View By Item: UNPOSTED & ON HOLD (763) POSTED (2) ALL (765) FILTERS

Showing Last 30 Days

1 Check the box to the left of the item to enable action(s) at the bottom of the screen

2 One action that can be applied is to add a note by selecting Add Note when All is selected. Notes can be entered for the item by selecting Add Note

3 This allows you to add a note to the transaction

Add Note

Leave a note: (Required)

Enter notes

250 Characters Max

CANCEL CLEAR ADD NOTE

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Manual Posting Summary

Items Total \$29,044.71 Unposted \$29,044.71 On Hold \$0.00 Posted \$0.00

Posting Items

04/12/2021 6:03:04 PM ET EXPORT

1

View By Batch

UNPOSTED & ON HOLD (9)

POSTED (0)

ALL (9)

FILTERS

Showing Last 30 Days Search Batches

Select **View by Batch** at the drop-down menu

	Assignee	Total Items	Images	Items Posted	Process Date	Batch Date	Lockbox	Batch	Division	Batch Amount	Details
<input type="checkbox"/>	Unassigned	8	29	0	04/05/2021	04/05/2021	100001	7188	Demo Website Division	\$2,591.78	VIEW
<input type="checkbox"/>	Unassigned	20	116	0	04/05/2021	04/05/2021	100001	7187	Demo Website Division	\$5,332.61	VIEW
<input type="checkbox"/>	Unassigned	14	54	0	04/05/2021	04/05/2021	100001	7186	Demo Website Division	\$1,757.18	VIEW
<input type="checkbox"/>	Unassigned	8	29	0	04/05/2021	04/05/2021	100001	7185	Demo Website Division	\$2,591.78	
<input type="checkbox"/>	Unassigned	20	116	0	04/05/2021	04/05/2021	100001	7184	Demo Website Division	\$5,332.61	
<input type="checkbox"/>	Unassigned	14	54	0	04/05/2021	04/05/2021	100001	7183	Demo Website Division	\$1,757.18	
<input type="checkbox"/>	Unassigned	8	29	0	04/05/2021	04/05/2021	100001	7182	Demo Website Division	\$2,591.78	
<input type="checkbox"/>	Unassigned	20	116	0	04/05/2021	04/05/2021	100001	7181	Demo Website Division	\$5,332.61	
<input type="checkbox"/>	Unassigned	14	54	0	04/05/2021	04/05/2021	100001	7180	Demo Website Division	\$1,757.18	

2

The table view provides information about how many items are assigned to each Assignee and the progress of the assignee through the items

3

Select **View** at any row to see more detailed Batch information

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ASSIGN PLACE ON HOLD POST UNASSIGN ADD NOTE

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All Batches > Batch Details

Batch Details
4

From the **Batch Details** view, Enhanced Users can see who is working on the item within the batch and the status of the items

Batch Date: 04/05/2021
Lockbox: 100001

Assignee
Unassigned

Batch Amount: \$2,591.78

Items (8) History

☐ Status
☐ Posted Date
☐ Assignee
☐ Payer

	Status	Posted Date	Assignee	Payer	Payment Number	Payment Amount	Images	Notes	Details
<input type="checkbox"/>	Unposted		Unassigned		2489	\$94.47	2		VIEW
<input type="checkbox"/>	Unposted		Unassigned		2489	\$244.85	5		VIEW
<input type="checkbox"/>	Unposted		Unassigned		2489	\$138.39	3		VIEW
<input type="checkbox"/>	Unposted		Unassigned		2489	\$1,507.84	3		VIEW
<input type="checkbox"/>	Unposted		Unassigned		2489	\$40.87	3		VIEW
<input type="checkbox"/>	Unposted		Unassigned		2489	\$372.96	3		VIEW
<input type="checkbox"/>	Unposted		Unassigned		2489	\$53.41	5		VIEW
<input type="checkbox"/>	Unposted		Unassigned		2489	\$138.99	5		VIEW

5

Select **View** next to each item to view the associated images

Page Size: 25 ▾

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ASSIGN PLACE ON HOLD POST UNASSIGN ADD NOTE

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Search Manual Posting Reconciliation User Management

All Batches > Batch Details > Item Details

Batch Details

Batch Date: 04/05/2021

Division: Demo Website Division

Batch Amount: \$2,591.78

Status: Unposted

Assignee: UNASSIGNED

Due Date: --

Posted Date: --

Assigned Date: --

Assigned By: --

Details Mixed

Images (2) History

1 of 2

+ ZOOM IN - ZOOM OUT ROTATE INVERT Annotation Tools: T

Batch Date: Apr 02, 2020

Process Date: Apr 02, 2020

Lockbox #: N/A

Batch #: N/A

Item #: 101

Check #: N/A

Amount \$: N/A

PAY TO THE ORDER OF \$

ASSIGN PLACE ON HOLD POST UNASSIGN ADD NOTE

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Click the **History** tab to view the full history of the selected transaction

To return to the main screen, select **Batch Details**, **All Batches**, or **Manual Posting** on the main menu

The Batch and Item Details are displayed at the top of the screen

An image can be expanded into a separate browser window or downloaded as a PDF file

An image can be annotated for further detail using the tools provided

Scanned images associated with the item can be selected and viewed

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

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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
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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

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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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