

# J.P. Morgan Access<sup>®</sup>

## USER GUIDE

Healthcare Link

Add New Healthcare Link Users in Access



J.P.Morgan

# Overview

Use J.P. Morgan Access to add new users to Healthcare Link



## 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

# User Management

Implementation users can set up new Healthcare Link users in J.P. Morgan Access



## ADD A NEW USER IN ACCESS

Users must be added in J.P. Morgan Access® before they can be set up and have their entitlements added or modified in Healthcare Link.

Users with administrative permissions in J.P. Morgan Access can add new users.

**1** Click **Administration** in the Access menu and select **Create User**.

**2** Enter First, Last Name, and email address in the **User Information** section.

**3** Enter a sample ID and click **VALIDATE** to ensure the ID is not already taken.

**User Profile**

Information must be entered in fields with a red asterisk (\*).

**User Information**

First Name \* john Initial

Last Name \* Diaz

Job Title

Employee ID

**Email Address**

Email Address \* john.doe@ Confirm Email Address \*

**Telephone Numbers**

Primary Phone # \* 1 : Ext. Type Business

Secondary Phone #1 1 : Ext. Type Mobile

Secondary Phone #2 1 : Ext. Type Other

Note: A mobile telephone number will be required for a software token assignment.

**Access User ID**

Access User ID \* Enter User Id VALIDATE SUGGEST

Access User ID

Access User ID \*

diazm1234

CHANGE

✓ Validation Successful

4

Confirm the ID is not currently taken.

Setup

SETUP TYPE \*

Which one should I select?

☒ Custom Setup

5

Select the **Custom Setup** radio button.

☐ Assign accounts to e

idually.

☐ User Group Entitlements

i

NEXT

6

Click **NEXT** to go to the Entitlements page

CANCEL

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The screenshot shows the 'Entitlements - John Diaz' page in the J.P. Morgan ACCESS system. The page has a navigation bar with 'Home', 'Reports & Statements', 'Administration', 'Receivables', and 'More Services'. A progress bar at the top indicates the current step is 'Entitlements'. The main content area is titled 'Entitlements - John Diaz' and includes a 'Product Selection' section with a list of categories: Payments, Reporting, Statements, File Settings and Visibility, and More Services. A callout labeled '7' points to the 'More Services' category. Below this, a 'More Services' panel is expanded, showing 'Product/Functions' with 'Healthcare Link' and 'Receivables (no token required)'. A callout labeled '8' points to the 'Healthcare Link' option. At the bottom of the panel are buttons for 'ADD/EDIT PRODUCT', 'REMOVE PRODUCT', 'PREVIOUS - USER PROFILE', and 'NEXT - CREDENTIALS'. A callout labeled '9' points to the 'ADD/EDIT PRODUCT' button. A callout labeled '10' points to the 'NEXT - CREDENTIALS' button. A callout labeled '10' also points to the 'NEXT - CREDENTIALS' button with the text 'Click NEXT-CREDENTIALS.'

Select **More Services** from the Product Selection list.

Select **Healthcare Link** from the Product / Functions list.

Click Add / Edit Product.

Click NEXT-CREDENTIALS.



Home Reports & Statements Administration Receivables More Services

Custom Setup - Credentials

John Diaz

User Profile Entitlements Credentials

LOGON TYPE

☒ Password ☐ Token

Activation Status  
Auto Activate

11 Under Custom Setup - Credentials, click **Password**.

Select **More Services** from the Product Selection list.

12 Click **NEXT-REVIEW**.

PREVIOUS - ENTITLEMENTS NEXT - REVIEW

Home Reports & Statements Administration Receivables More Services

Custom Setup - Review

John Diaz

User Profile Entitlements Credentials

13 Review and confirm all information is correct.

14 Click **SUBMIT FOR APPROVAL** if everything is correct.

Upon approval of this request, the user will be activated and the system will email the user with their login information.

Expand/Collapse All

User Profile

ACCESS User ID  
diazm1234

Job Title  
..

Email Address  
john.doe@jpm.com

Employee ID

Entitlements

Utilities

More Services

Selected products  
Healthcare Link

SUBMIT FOR APPROVAL PREVIOUS - CREDENTIALS CANCEL REQUEST

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# FAQs



## FAQs

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➤ **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

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➤ **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
<b>ACH</b>	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
<b>Account Number</b>	Number encoded on checks (or other documents) to identify the holder of the bank account number
<b>Artificial Intelligence (AI)</b>	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
<b>Assignee</b>	The person in which the item is assigned to. Assignee name is displayed
<b>Assigned Date</b>	The date the task is assigned by the Enhanced User
<b>Assigned By</b>	The name of the individual who assigned the item
<b>Batch</b>	Number of items (i.e., scanned images in the lockbox) processed at one time to form a bundle of work
<b>Batch Amount</b>	The dollar amount of all checks within the batch
<b>Batch Date</b>	The date on which the batch was created by the J.P. Morgan lockbox or image vendor
<b>Batch/Deposit Date</b>	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
<b>Batch Number</b>	The number assigned to a batch by J.P. Morgan
<b>Check Date</b>	The date on which the check was written
<b>Claim Count</b>	The number of processed claims. Only applicable for EOB conversion clients
<b>Credit</b>	Payment received by the provider from the payer / insurer

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Term/Acronym	Description
<b>DDA</b>	Demand Deposit Account. Checking account where funds can be withdrawn at any time without prior notice to the bank
<b>Deposit Date</b>	Date on which the check was deposited
<b>Division</b>	A particular site or department within the provider's organization
<b>Due Date</b>	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
<b>EDI</b>	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
<b>EFT</b>	Electronic Funds Transfer. The transfer of money initiated through electronic terminal, automated teller machine, computer, telephone, or magnetic tape
<b>EOB</b>	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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<b>Due Date</b>	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
<b>EDI</b>	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

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Term/Acronym	Description
<b>EFT</b>	Electronic Funds Transfer. The transfer of money initiated through electronic terminal, automated teller machine, computer, telephone, or magnetic tape
<b>EOB</b>	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
<b>ERA</b>	Electronic Remittance Advice. The name (given by insurers) to the electronic file, which gets posted to the provider
<b>File Name</b>	The 835-file name
<b>HIPAA</b>	Health Insurance Portability and Accountability Act of 1996
<b>Items Posted</b>	When viewing by batch, a user can see total items in the batch and number of items posted within the batch
<b>Latest Notes</b>	The most recent notes the user entered while working on the assigned task
<b>Lockbox</b>	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
<b>Lockbox Number</b>	The number of the J.P. Morgan lockbox used to process the paper documents (i.e., remittance advice, explanation of benefits) from the insurer
<b>Modifier</b>	A code used to further define a medical procedure or service
<b>Negotiated Charge</b>	The amount the insurer has negotiated to pay the provider for a particular service/procedure
<b>OCR</b>	Optical Character Recognition. Refers to the printed scan line of information on the bottom line of documents that is read with an optical reader
<b>PAS</b>	Patient Accounting System
<b>Patient Account Number</b>	A unique number associated with the patient



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Term/Acronym	Description
<b>Patient Responsibility</b>	The amount the patient must pay the provider, as specified on the contract between the patient and the payer / insurer
<b>Payable Amount</b>	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.
<b>Payer</b>	The name of the insurer.
<b>Payment Number</b>	A written order to a bank to pay another party the amount specified from funds on deposit
<b>Payment Amount</b>	The amount of the payment in dollars
<b>Post(ed) Date</b>	The date on which a batch, check, or transaction was posted.
<b>Returned ERA</b>	835 files returned to client
<b>Search Criteria Pane</b>	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
<b>Site</b>	The location of a particular division or department within the provider's organization
<b>Total Items</b>	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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