

J.P. Morgan Access[®]

Healthcare Link 2.0 Quick Tips



J.P.Morgan

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

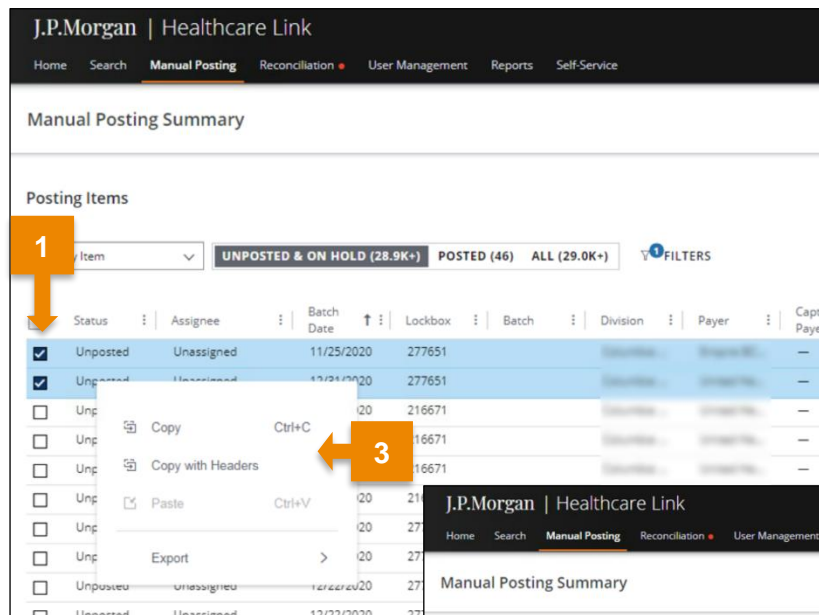
Healthcare Link enables you to streamline the payment processing cycle and realize greater savings through increased automation by matching payments and corresponding remittance advices (RAs). This process provides reconciled files for posting to your practice management system. Workflow tools enable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

What's New In 2.0?

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

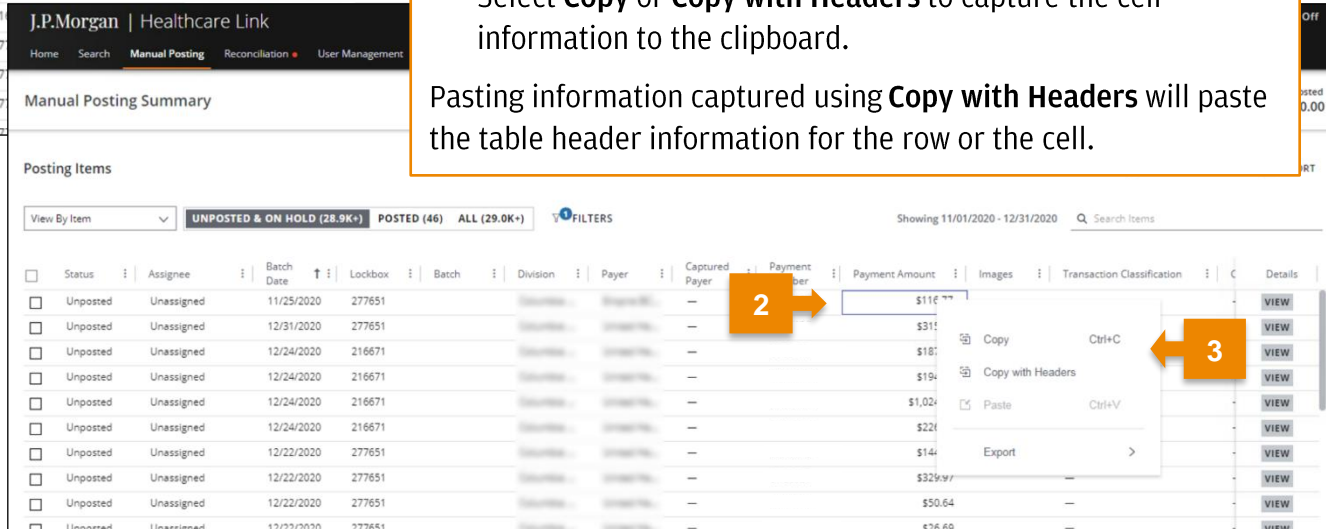
- Consistent view with multiple applications built-in
- Single user logins with appropriate multi-level security to help protect your privacy and preserve data authenticity
- Better management of your preferences and settings
- User Authentication to securely enroll and manage users. Once enrolled, Two 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



The information displayed in tables in Healthcare Link can be copied and pasted to other applications (e.g. spreadsheet, word processor, etc.).

1. Select a row or multiple rows to copy all of the information within the row(s).
2. Right-click on the selected row(s) and select **Copy** or **Copy with Headers** to capture the row information to the clipboard.
3. Select an individual piece of data from the table by right-clicking on the cell (make sure the row is NOT selected). Select **Copy** or **Copy with Headers** to capture the cell information to the clipboard.

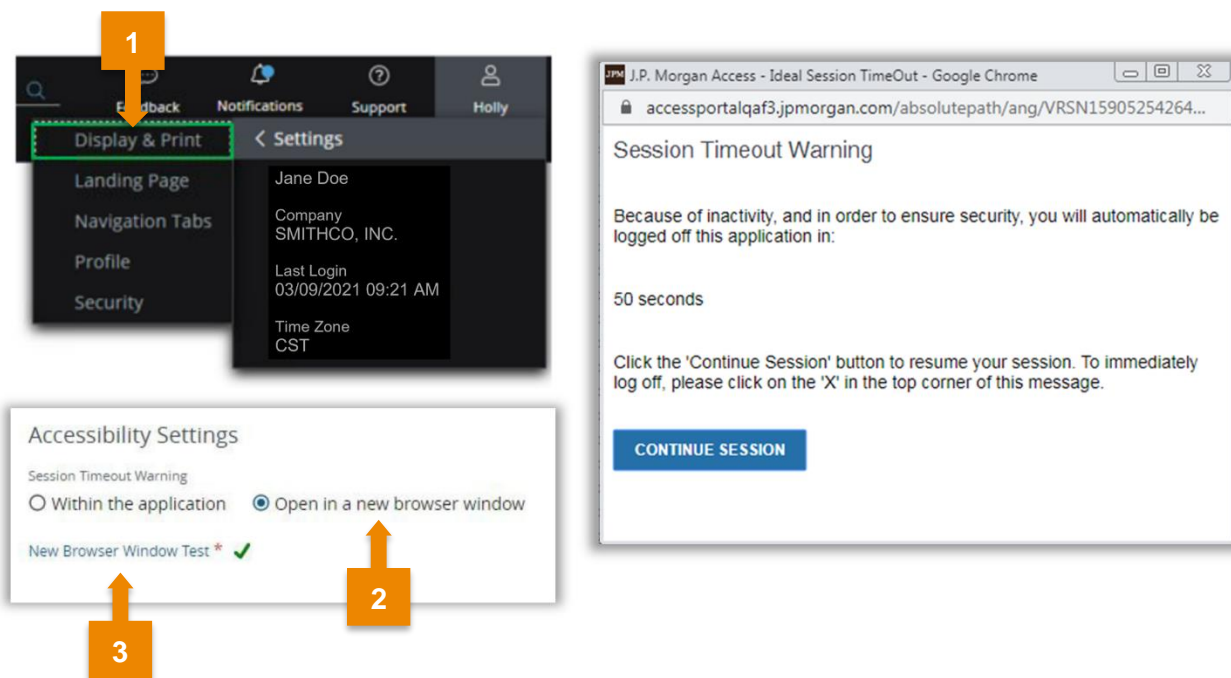
Pasting information captured using **Copy with Headers** will paste the table header information for the row or the cell.



NOTE: All information included in the Healthcare Link screens in this material is a demo representation and does not reflect actual client data.

Make sure that the session timeout warning displays clearly so the user can continue the session if needed.

1. When in Access portal (not HCL), go to **Settings > Display & Print**
2. Under **Accessibility Settings**, change the **Session Timeout Warning** to “Open in a new browser window”
3. Once they select that setting, the application gives them a “test” to make sure that popup will work. Sometimes it works and sometimes they need to change a browser setting to allow it. **It is important to do the test not just change the setting.**



1. Clicking on **Grid Help** provides navigation options utilizing your keyboard.

Reconciliation Manager

Remittances total	\$11,758,686.68	Unreconciled	\$1,396,115.28	Reconciled	\$9,709,539.33	Manually Posted	\$0.00	Closed	\$0.00	Distributed	\$653
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Remittances

UNRECONCILED (20) RECONCILED (1.4K+) MANUALLY POSTED OR CLOSED (0) DISTRIBUTED (4) ALL (1.5K+) FILTERS

Showing 04/07/2022 - 04/13/2022 Search Remittances

	Data Source	Provider Account Number	Lockbox Number	Batch Number	Payment Type	Payer (Payment)	Payer (ERA)	Payment Number	Payment Amount	Outstanding
i22	ERA	—	—	—	Check	—	ECHO - EL...		\$19.40	GAT
i22	ERA	—	—	—	Check	—	ECHO - EL...		\$16.49	GAT
i22	ERA	—	—	—	Check	—	ECHO - EL...		\$16.49	GAT
i22	ERA	—	—	—	Check	—	Aetna Sen...		\$9.62	GAT
i22	ERA	—	—	—	Check	—	Aetna Sen...		\$96.20	GAT
i22	ERA	—	—	—	Check	—	Aetna Sen...		\$10.30	GAT
i22	ERA	—	—	—	Check	—	Tricare He...		\$83,239.32	GAT
i22	ERA	—	—	—	Check	—	Tricare He...		\$5,105.75	GAT
i22	ERA	—	—	—	Check	—	BCBS Ant...		\$133.62	GAT
i22	ERA	—	—	—	Check	—	ECHO - EL...		\$159.75	GAT

i Grid Usage Information

In-grid filters
If the select all header checkbox is checked and then in-grid filters are applied, the select all checkbox will be deselected and users will have to reselect grid rows.

Right Arrow
Moves focus one header or cell to the right. If focus is on the furthest right header or cell in the row, focus doesn't move.

Left Arrow
Moves focus one header or cell to the left. If focus is on the furthest left header or cell in the row, focus doesn't move.

Down Arrow
If focus is on a column header, focus moves down to the grid cell immediately below the column header. If focus is on a grid cell, focus moves one cell down. If focus is on the bottom cell in the column, focus doesn't move.

Up Arrow
If focus is on a column header, focus doesn't move. If focus is on a grid cell, focus moves one cell up. If focus is on the top cell in the column, focus moves to the column header immediately above the cell.

Control + Enter
When focused to any of the grid headers, typing this key sequence will open the in-grid menu filters

Control + Home
Moves focus to the first cell in the first row.

Control + End
Moves focus to the last cell in the last row.

Space
Selects the row that has the currently focused cell

Enter
Selects the cell that is currently focused.

The screenshot displays the J.P. Morgan Access user interface. The top navigation bar includes links for Overview, Copy & Paste, Adjust Session Timeout, Grid Help, **Set Landing Page**, FAQs, and Glossary. The main content area is titled 'J.P. Morgan | Access' and features a search bar. On the left, a 'Settings' sidebar lists options: Display & Print, **Landing Page**, Navigation Tabs, Profile, and Security. The 'Landing Page' section is active, showing 'Starting Page' and 'Starting Page Layout' dropdown menus, both currently set to 'More Services'. At the bottom of this section are 'SAVE' and 'RESTORE DEFAULTS' buttons. A settings sub-menu is open, showing options like Display & Print, Landing Page, Navigation Tabs, Profile, and Security. The 'Landing Page' option is highlighted. A user profile dropdown is also visible, showing the user's name 'Eric' and other details. Four numbered orange arrows indicate the steps: 1. Click on the user profile icon in the top right. 2. Click on 'Landing Page' in the settings sub-menu. 3. Click on 'More Services' in the 'Starting Page' dropdown. 4. Click on the 'SAVE' button.

Users can open **Healthcare Link** more quickly by setting the **More Services** page as the default page after logging into **J.P. Morgan Access**.

1. Open User Preferences by clicking on User ID in the menu bar.
2. Select the Landing Page option under the Settings sub-menu item.
3. Select the More Services page from the Starting Page drop down menu.
4. Click the SAVE button to register this update.

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.

Glossary (cont.)

Term/Acronym	Description
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.
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.

Glossary (cont.)

Term/Acronym	Description
ERA	Electronic Remittance Advice. The name (given by insurers) to the electronic file, which gets posted to the provider.
File Name	The file name for the 835, Epic, BAI, or Indexed Image file.
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.
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.

Glossary (cont.)

Term/Acronym	Description
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 associates 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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