

J.P. Morgan Access[®]

USER GUIDE

Healthcare Link

Search by Transaction, Batch, or Patient

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

Search

The Healthcare Link Search functions provide flexibility around user defined reporting views so that they can customize views around their workflows.

Any data point can be searched for quickly by choosing to view transactions by lockbox batch, individual transactions, or by patient.

[Batch Search](#) | [Transaction Search](#) | [Patient Search](#)

Batch Search

View or print Explanation of Benefits (EOB) images downloaded/deposited in a particular batch on a specified date or range of dates



J.P.Morgan | Healthcare Link

Home

Search

Manual Posting

Reconciliation

User Management

Reports

Filter

Batch View Range

Last 30 Days

Batch Date Range

Start Date - End Date

Division

All

Lockbox

All

Batch Number

Batch Amount

MANAGE PREFERENCES

CLEAR

APPLY

Search Healthcare

BATCH

TRANSACTION

PATIENT

FILTERS

Batch Date

Process Date

Lockbox

Batch Number

Batch Amount

Returned ERA

Division

Details

04/12/2021

04/12/2021

100001

7420

\$240.00

No

Demo Website Division

VIEW

04/12/2021

04/12/2021

100001

7421

\$100.00

No

Demo Website Division

VIEW

04/12/2021

04/12/2021

100001

7422

\$94.47

No

Demo Website Division

VIEW

04/12/2021

04/12/2021

1001

Demo Website Division

VIEW

04/12/2021

04/12/2021

1001

Demo Website Division

VIEW

04/12/2021

04/12/2021

1001

Demo Website Division

VIEW

Page Size

25

1 to 6 of 6

Page 1 of 1

Showing Last 30 Days

Search Batches

04/13/2021 11:14:16 AM ET

EXPORT

Select **Batch** to search all associated batch transactions. Refresh the data in the grid as needed by clicking on the Search tab (e.g., **Batch**, **Transaction**, **Patient**)

Click on a column header to sort the file, batch, and transaction information by ascending or descending order

J.P.Morgan | Healthcare Link Jarek W. ▾ ? Help ↗ Log Off

Home **Search** Manual Posting Reconciliation User Management Reports

Filter ✕ Search Healthcare 04/13/2021 11:14:16 AM ET [EXPORT](#)

Click the **Pin Tool** to keep the filter panel open

Click the **"X"** to close the filter panel

Refine results using the **Filters** icon

Filter by any of the following:

- Date Range
- Division
- Lockbox
- Batch Number
- Batch Amount

Click the **Apply** button to register any filter options

Showing Last 30 Days

Transaction	Patient	Filters					
↓	Process Date	Lockbox	Batch Number	Batch Amount	Returned ERA	Division	Details
04/12/2021	04/12/2021	100001	7420	\$240.00	No	Demo Website Division	VIEW
04/12/2021	04/12/2021	100001	7421	\$100.00	No	Demo Website Division	VIEW
04/12/2021	04/12/2021	100001	7422	\$94.47	No	Demo Website Division	VIEW
04/12/2021	04/12/2021	1001	7417	\$240.00	No	Demo Website Division	VIEW
04/12/2021	04/12/2021	1001	7418	\$100.00	No	Demo Website Division	VIEW
04/12/2021	04/12/2021	1001	7419	\$94.47	No	Demo Website Division	VIEW

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Home **Search** Manual Posting Reconciliation User Management Reports

Jarek W. ▾ ? Help ↗ Log Off

Filter ✕

Batch View Range

Last 30 Days ▾

Batch Date Range

Start Date - End Date 📅

Division

All ✕ ▾

Lockbox

All ✕ ▾

Batch Number

Batch Amount

CLEAR **APPLY**

Search Healthcare

04/13/2021 11:14:16 AM ET **EXPORT**

BATCH TRANSACTION PATIENT ▾ FILTERS

Showing Last 30 Days 🔍 Search Batches

Batch Date	Process Date	Lockbox	Batch Number	Batch Amount	Returned ERA	Division	Details
04/12/2021	04/12/2021	100001	7420	\$240.00	No	Demo Website Division	VIEW
04/12/2021	04/12/2021	100001	7421	\$100.00	No	Demo Website Division	VIEW
04/12/2021	04/12/2021	100001	7422	\$94.47	No	Demo Website Division	VIEW
04/12/2021	04/12/2021	1001	7417			bsite Division	VIEW
04/12/2021	04/12/2021	1001	7418			bsite Division	VIEW
04/12/2021	04/12/2021	1001	7419			bsite Division	VIEW

Returned ERA ("Yes" or "No") indicates if the ERA file has been returned to a specific provider/division. The file name and distribution date associated with the Returned ERA can be viewed via the Outbound File Report

See more batch details by selecting **View**

Page Size 25 ▾

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Home **Search** Manual Posting Records

Batch Results > Batch Details

Batch Details

Batch Date: 04/12/2021
Process Date: 04/12/2021
Transactions

Batch Amount: \$240.00
Returned ERA: No
Division: Demo Website Division

1

Information about the batch is displayed at the top of the screen

2

Individual transactions included in the batch are listed in a table that can be filtered or sorted directly in the column

3

See the individual transaction details by selecting View

4

To return to main screen, select **Batch Results** or select **Search** on the main menu

Date	Payer	Source	Amount	Payment Number	Lockbox	Batch	Division	Transaction Classification	Details
04/12/2021		Enhanced Lockbox	\$99.25		100001	7420	Demo Website Division	—	VIEW
04/12/2021		Enhanced Lockbox	\$154.53		100001	7420	Demo Website Division	—	VIEW
04/12/2021		Enhanced Lockbox	\$164.10		100001	7420	Demo Website Division	—	VIEW
04/12/2021		Enhanced Lockbox	\$240.00		100001	7420	Demo Website Division	—	VIEW
04/12/2021		Enhanced Lockbox	\$55.16		100001	7420	Demo Website Division	—	VIEW
04/12/2021		Enhanced Lockbox	\$148.69		100001	7420	Demo Website Division	—	VIEW

Page Size: 25

1 to 14 of 14 Page 1 of 1

The screenshot displays the 'Batch Search' interface. The top navigation bar includes 'Home', 'Search', 'Manual Posting', 'User Management', 'Reports', and 'Self-Service'. The 'Search' tab is active, showing 'Batch Results' and 'Batch Details'. The 'Batch Details' section shows the 'Batch Date' as '06/08/2022'. A callout labeled '1' points to the 'Images (29)' tab, which is highlighted in yellow. A second callout labeled '2' points to a 'Pop-Out Window' icon (a small square with a plus sign) located next to a scanned image of a check. A third callout labeled '3' points to a scrollable list of items within a pop-out window, which is shown as a separate window next to the main interface. The main interface displays a list of scanned items, with the first item being a check from 'United World Life Insurance Company' payable to 'UNIVERSITY OF CO HOSP'.

Select the **Images** tab to display scanned correspondence

Click the Pop-Out Window icon to display the scanned images in a separate window

A user can easily see all items within a batch by selecting the pop-out window next to the images to scroll through all scanned items.



Home Search Manual Posting User Management Reports Self-Service

Batch Results > Batch Details

Batch Details

Batch Date 06/08/2022

Batch Number 407

Batch Amount \$5,219.73

Returned ERA No

Division UCH Business Services Insurance

Images (29) Transaction

1 of 29

1

Select the Images tab to display scanned correspondence

2

Click the download icon to save the scanned images as a PDF file for further review

Download

Select pages to download

☒ All

☐ Images from:

Start Range 1 to End Range 29

☐ Include image annotations

CANCEL DOWNLOAD

3

Users can determine which images get saved - either all items in the batch or a specified range of items

Transaction Search

Easily search for a desired transaction



Search Healthcare

11/22/2021 8:56 AM ET ↓ EXPORT

1

BATCH	TRANSACTION	PATIENT
-------	-------------	---------

▼ FILTERS

2

Refine your results using the **Filters** pane or clicking on any of the column Filter icons

4

Columns can be sorted in ascending or descending order by clicking on the column title. Click the title until the arrow displays in the desired sort direction

Select **Transaction** to search all associated transactions. Refresh the data in the grid as needed by clicking on Search tab (e.g., **Batch, Transaction, Patient**)

Customize the table view by selecting a preferred **Page Size**


3

Page Size 25

1,101 to 1,125 of 11,481

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Search Healthcare

11/22/2021 8:56 AM ET [EXPORT](#)

BATCH TRANSACTION PATIENT			FILTERS		Showing Last 30 Days		Search Transactions	
Date	Payer	Captured Payer	Source	Number	Lockbox	Batch	Division	Details
11/19/2021	Enhanced Lockbox	—	Enhanced Lockbox	9755591	906	Transaction Batch Code	C	VIEW
11/19/2021	Enhanced Lockbox	—	Enhanced Lockbox	9755591	908	Transaction Batch Code	C	VIEW
11/19/2021	Enhanced Lockbox	—	Enhanced Lockbox	9755591	908	Transaction Batch Code	C	VIEW
11/19/2021	Enhanced Lockbox	—	Enhanced Lockbox	9755591	908	Transaction Batch Code	C	VIEW
11/19/2021	Enhanced Lockbox	—	Enhanced Lockbox	9755591	908	Transaction Batch Code	C	VIEW
11/19/2021	Enhanced Lockbox	—	Enhanced Lockbox	9755591	908	Transaction Batch Code	C	VIEW
11/19/2021	Enhanced Lockbox	—	Enhanced Lockbox	9755591	903	Transaction Batch Code	Z	VIEW
11/19/2021	Enhanced Lockbox	—	Enhanced Lockbox	9755591	901	Transaction Batch Code	C	VIEW
11/19/2021	Enhanced Lockbox	—	Enhanced Lockbox	9755591	901	Transaction Batch Code	C	VIEW

5

Users can filter on the Source column to better group and display transactions from a specific source (e.g. ACH, ERA, Lockbox, etc.). Multiple sources can be chosen to filter on by clicking on the three dots next to column title.

Search Healthcare

BATCH TRANSACTION PATIENT ▾ FILTERS

Batch : Division : Transaction Classification : Correspondence Category : Exceptions Classification

—	Transaction Classification	—	—	—
—	Transaction Classification	—	—	—
—	Transaction Classification	—	—	—
899	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—
900	Transaction Classification	Letter	Other Correspondence	—

The **Notes** column displays whether a transaction has a note attached to it or not. The number of notes appears in parentheses

Notes (1)

Showing Newest to Oldest

11/19/2021 6:28 PM [redacted] 11/19/2021

Click on the **Notes(#)** link in a row to see the note(s) for that row in a pop-up window

Click the **View** button to view the note in the Details screen

Page Size 25 ▾

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Filter

Filter Preferences Currently Applied

Payment Number

Paid Amount

Lockbox

All

Transaction Classification

All

Exceptions Classification

All

Correspondence Category

All

Note Keyword

Testing adding a note

MANAGE PREFERENCES

CLEAR

APPLY

Page Size 25 ▾

Search Healthcare

04/13/2021 1:30:18 PM ET EXPORT

BATCH

TRANSACTION

PATIENT

FILTERS

Note: "Testing adding a note"

Showing Last 30 Days

Search Transactions

Lockbox	Batch	Division	Transaction Classification	Correspondence Category	Exceptions Classification	Notes	Details
100001	7104	Demo Website Division	—	—	—	NOTES (1)	VIEW

1

Open the **Filters** pane to search all notes by keyword

2

Enter any value in the **Note Keyword** field and click on **Apply** to search through the notes

3

Click on the **Notes(#)** link or on the **View** link to view the notes information in detail



Transaction Details

Date	Payer	Enhanced Lockbox	\$16.73	Payment Number	Division	Lockbox	Batch
11/19/2021						9755591	906

Transaction Classification	Correspondence Category	Exceptions Classification	Payee Name	Transaction Sequence	Returned ERA	Outbound File Name
CHK-EOB			—	—	Yes	CONVCOMM00000001120210d82c32d-gb8e-40a8-9d05-973ba8752252.835

Click on the **Claims** tab to see specific claim items attached to the selected transaction

Search Claims EXPORT

Claim Id	Patient Account Number	Full Name	Billed Amount	Paid Amount	Patient Responsibility	Adjustments Amount	Details
			\$147.00	\$16.73	\$0.00	\$130.27	VIEW



Transaction Results > Transaction

Transaction Details

Date	Payer	Amount	Payment Number	Division	Lockbox	Batch
11/19/2021	Enhanced Lockbox	\$16.73			9755591	906

Transaction Classification	Correlation	Payee Name	Transaction Sequence	Returned ERA	Outbound File Name
CHK-EOB	—	—	—	Yes	CONVCOMM00000001120210d82c32d-db8e-40a8-9d05-973ba8752252.835

Claims Images (4)

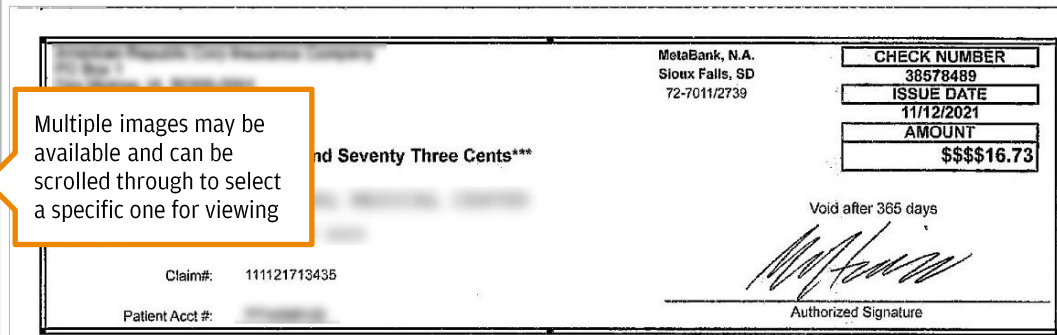
1 of 4 OUT ROTATE INVERT Annotation Tools: T [pen] [eraser] [undo] [redo] [delete] CLEAR ALL [download]



3 Return to the Transactions table view by clicking on **Transaction Results**

1 Click on the **Images** tab to see scanned images related to the transaction

2 Multiple images may be available and can be scrolled through to select a specific one for viewing



Transaction Results > Transaction Details

Transaction Details

Date
11/19/2021

Payer

Amount
\$16.73

Use the **Annotation Tools**
(add text, highlight, draw,
etc.) to mark up the
image directly

Division

Lockbox

Batch
906Transaction Classification
CHK-EOB

Correspond

Returned ERA
YesOutbound File Name
[CONVCOMM0000001120210d82c32d-
db8e-40a8-9d05-973ba8752252.835](#)

Claims Images (4) History

1 of 4 + ZOOM IN - ZOOM OUT ROTATE INVERT Annotation Tools: T [pen icon] [highlighter icon] [eraser icon] [undo icon] [redo icon] [delete icon] CLEAR ALL [download icon]

1

2

Multiple images may be available and can be scrolled through to select a specific one for viewing

3

Sixteen Dollars and Seventy Three Cents

Claim#: 111121713435

Patient Acct #: [blurred]

MetaBank, N.A.
Sioux Falls, SD
72-7011/2739

Void after 365 days

Authorized Signature

CHECK NUMBER
38578489

ISSUE DATE
11/12/2021

AMOUNT
\$\$\$16.73

4

Download images in PDF format by clicking the Download icon

Patient Search

Easily search for information based on a specific patient



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Jarek W.
Help
Log Off

Home
Search
Manual Posting
Reconciliation
User Management
Reports

BATCH
TRANSACTION
PATIENT

1

Click on the **Patient** tab to search for transactions based on patient-specific information

2

Use the patient-specific columns to filter and sort the information as needed

3

Use the **Filters** pane and the Search bar to narrow the table down as needed

03/06/2021 6:01:14 PM ET
EXPORT

Showing 11/01/2020 - 12/31/2020
Search Patient Records

Deposit Date	Payer	Patient Account Number	Patient First Name	Patient Last Name	Billed Amount	Paid Amount	ERA Source	Lockbox	Claim Id	Details
11/28/2020	\$138,145.47	\$138,145.47	ERA	—		VIEW
					\$239,294.99	\$126,226.95	ERA	—		VIEW
					\$248,553.00	\$67,723.56	ERA	—		VIEW
					\$65,017.68	\$65,017.68	ERA	—		VIEW
					\$155,450.00	\$60,729.95	ERA	—		VIEW
					\$68,439.00	\$54,101.90	ERA	—		VIEW
11/17/2020	\$268,434.00	\$50,911.25	ERA	—		VIEW
11/12/2020	\$217,982.00	\$45,894.26	ERA	—		VIEW
11/24/2020	\$243,225.00	\$45,269.08	ERA	—		VIEW
11/25/2020	\$90,590.00	\$44,780.26	ERA	—		VIEW
11/25/2020	\$89,950.00	\$44,495.70	ERA	—		VIEW
11/05/2020	\$119,394.00	\$44,258.91	ERA	—		VIEW
11/10/2020	\$129,345.00	\$43,685.81	ERA	—		VIEW
11/03/2020	\$174,026.00	\$42,335.80	ERA	—		VIEW
11/17/2020	\$185,175.00	\$39,843.47	ERA	—		VIEW
11/03/2020	\$152,668.00	\$39,437.13	ERA	—		VIEW
11/24/2020	\$200,476.00	\$38,409.70	ERA	—		VIEW

4

Click on the **View** button to see the transaction details for a specific row item

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Home Search Manual Posting Reconciliation User Management Reports

Patient Claim Results > Patient Claim Details

3

Return to the Patient table view by clicking on Patient Claim Results

1

The details about the Patient Claim are listed at the top of the screen

2

Click on the Services tab to see specific service code information associated with the Patient Claim. Click on the Images tab to see scanned images (if available) related to the transaction

▼ Patient Claim Details

Claim Id	Patient Account Number	Full Name	Billed Amount	Paid Amount	Patient Responsibility	Adjustments Amount	Payment Number
			\$355.00	\$73.62	—	\$281.38	—

Services Images (0)

Search Services

EXPORT

	Billed Amount	Paid Amount	Service Start Date	Service End Date	Allowed Amount	Disallowed Amount	Patient Responsibility	Reason Code
1	\$355.00	\$73.62	—	—	\$73.62	\$0.00	\$0.00	45

Page Size 25 ▾

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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

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

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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