

J.P. Morgan Access[®]

USER GUIDE

Healthcare Link
Self-Service

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

Self-Service

Update National Provider Identifier (NPI) Division Mappings



Self-Service

Enhanced users with Reconciliation Manager entitlements can view, update, and add NPI Division Mappings in the Healthcare Link Self-Service feature

1

View the alert to determine any NPI Division (previously, ERA Divisions in HCL 1.0) Mappings required. Click on the **View NPI Division Mapping** link or...

02/08/2021 12:18:45 PM ET



DATA MAPPINGS

NPI Division Mapping

2

Click on **Self-Service** on the main menu and then select **NPI Division Mapping** to view a listing of Division Mappings

Dollars Breakdown



Grand Total

\$108,849.83

Posted	\$16,816.39
Unposted	\$81,750.18
On Hold	\$10,283.26



Exceptions	53
Letters	0
EOB	0

Items By Status



⚠ You have 480 Unposted Items older than one week

[VIEW MANUAL POSTING](#)

Payments & Patient Accounting Breakdown

Type Patient Accounting

Patient Accounting Grand Total

\$5,750.51

Matched Patient Accounting



Matched	\$1,376.51
Unmatched	\$4,374.00
Closed	\$0.00

⚠ You have 8 unidentified National Provider IDs with no Division mapped. [View NPI Division Mapping](#)

NPI Division Mapping

7/29/2020 9:32 AM EST

ADD MAPPING

Providing Healthcare Link with your National Provider ID (NPI) and Division mapping allows for a seamless Remittance file processing

Q Search			
National Provider ID (NPI)	Division Name	Status	Action
908241	⚠ Unidentified	—	EDIT
234587523	⚠ Unidentified	—	EDIT
234981	⚠ Unidentified	—	EDIT
13509238	⚠ Unidentified	—	EDIT
1209412	⚠ Unidentified	—	EDIT
325780001	⚠ Unidentified	—	EDIT
324059803	⚠ Unidentified	—	EDIT
46430	⚠ Unidentified	—	EDIT
34634630	Clinic	Active	EDIT
21352	Clinic	Active	EDIT
15436390	Imaging Services	Active	EDIT
6547548	Laboratory Services	Active	EDIT
235309	Laboratory Services	Active	EDIT
009358543	Laboratory Services	Active	EDIT
89894764	Pharmacy	Active	EDIT
298881893	Pharmacy	Active	EDIT

1
NPIs with unidentified divisions should be edited to map a division to the NPI number

3
Click on the **Add Mapping** button to create a new mapping

2
Click the **Edit** button on any row requiring a mapping update to open the Edit Mapping window

J.P. Morgan | Healthcare Link

Home Search Manual Posting Reconciliation User Management **Self-Service**

⚠ You have 8 unidentified National Provider IDs with no Division mapped. [View NPI Division Mapping](#)

NPI Division Mapping

7/29/2020 9:32 AM EST [ADD MAPPING](#)

Providing Healthcare Link with your National Provider ID (NPI) and Division mapping allows for a seamless Remittance file processing

National Provider ID	Division	Status	Action
908241			EDIT
234587523			EDIT
234981			EDIT
13509238			EDIT
1209412			EDIT
325780001			EDIT
324059803			EDIT
46430			EDIT
34634630			EDIT
21352			EDIT
15436390			EDIT
6547548			EDIT
235309			EDIT
009358543	Laboratory Services	Active	EDIT
89894764	Pharmacy	Active	EDIT
298881893	Pharmacy	Active	EDIT

Edit Mapping

National Provider ID

908241

Division

Select Division

Status

☒ Active ☐ Inactive

CANCEL

SAVE MAPPING

1

Click the **Edit** button to open the Edit Mapping window

2

Select the **Division** to map to the NPI number and select whether the **Status** will be active or inactive. Make sure to click on the **Save Mapping** button to register the edits to the NPI number

© 2021 J.P. Morgan Chase & Co

[Contact Us](#) [Security & Privacy](#) [Terms and Conditions](#)

J.P. Morgan | Healthcare Link

Home Search Manual Posting Reconciliation User Management **Self-Service**

NPI Division Mapping 7/29/2020 9:32 AM EST ADD MAPPING

Providing Healthcare Link with your National Provider ID (NPI) and Division mapping allows for a seamless Remittance file processing

Add Mapping

National Provider ID

Division

CANCEL **ADD MAPPING**

✓ Success
Successfully made changes

1 Click the **Add Mapping** button to open the Add Mapping window

2 Enter the **National Provider ID** and select the **Division** to map to the NPI number. Make sure to click on the **Add Mapping** button to register the new mapping

234587523				
234981				
13509238				
1209412				
325780001				
324059803				
46430				
908241				
34634630				
21352				
15436390				
6547548	Laboratory Services	Active		
235309	Laboratory Services	Active		
009358543	Laboratory Services	Active		
89894764	Pharmacy	Active		
298881893	Pharmacy	Active		

1 to 25 of 46 << >> Page 1 of 2

© 2021 J.P. Morgan Chase & Co. Contact Us Security & Privacy Terms and Conditions

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

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

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

Notwithstanding anything to the contrary, the statements in this material is confidential and proprietary to J.P. Morgan and is provided for your general information only. It is subject to change without notice and is not intended to be legally binding. All services described in this guide are subject to applicable laws and regulations and service terms. Not all products and services are available in all locations. Eligibility for particular products and services will be determined by JPMorgan Chase Bank, N.A. or its affiliates. J.P. Morgan makes no representation as to the legal, regulatory or tax implications of the matters referred to in this guide. Any products, services, terms or other matters described herein (other than in respect of confidentiality) are subject to, and superseded by, the terms of separate legally binding documentation and/or are subject to change without notice.

J.P. Morgan is a marketing name for the J.P. Morgan Payments businesses of JPMorgan Chase Bank, N.A. and its affiliates worldwide.

JPMorgan Chase Bank, N.A. Member FDIC. JPMorgan Chase Bank, N.A., organized under the laws of U.S.A. with limited liability.

©2021 JPMorgan Chase & Co. All rights reserved.

04192021_RD