

J.P. Morgan Access[®]

USER GUIDE

Healthcare Link
User Management

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

User Management

Healthcare Link administrative users can set up new users
and manage the entitlements for existing users



Set Up New User In Healthcare Link

Modify Existing User In Healthcare Link

SET UP NEW USER IN HEALTHCARE LINK

Users who have already been added to JP Morgan Access and have been entitled with Healthcare Link are available for further setup in Healthcare Link.

SA Users with administrative permissions in Healthcare Link can add entitlements and product options to a user's profile.

MODIFY EXISTING USER IN HEALTHCARE LINK

Users who have already been added to JP Morgan Access and have been previously setup within Healthcare Link can have their entitlements and product access modified within Healthcare Link.

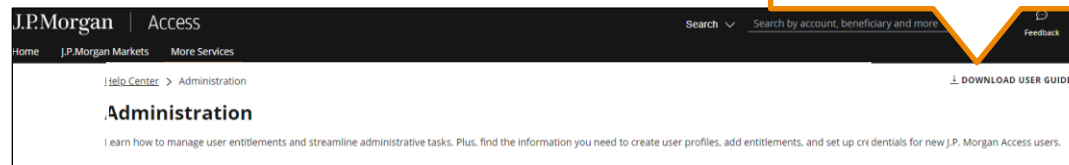
SA Users with administrative permissions in Healthcare Link can modify entitlements and product options in a user's profile.

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.

See the Help Guides under the **Help** menu in J.P. Morgan Access.

See the J.P. Morgan Access Healthcare Link User Guide for adding or deleting users, managing account groups, or creating user groups

[Help Center > Administration > Download User Guide](#)



Set Up New User In Healthcare Link

Modify Existing User In Healthcare Link

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

USER MANAGEMENT

Set Up New Users

Modify Existing Users

1 Click **User Management** from the Healthcare Link main menu

2 Select **Set Up New Users** to display the Set Up New Users screen. Any new users that are available will be displayed in a table

3 Add Entitlements to the profiles of any selected users. Multiple users may be selected at a time

01/14/2021 8:45:36 AM ET EXPORT

Access ID	First and Last Name	Email
pPLaHtBuyVVeZ KaWu		masked.email@jpmchase.com
areBYyb RucOuRoPaBe		masked.email@jpmchase.com
iZOehL EcPKvj		masked.email@jpmchase.com
bXAqm FNQlurF		masked.email@jpmchase.com
TRjd bhAorR		masked.email@jpmchase.com
yeLRGPS lkyOU		masked.email@jpmchase.com
gkXCXwPO lazfp		masked.email@jpmchase.com
hqoZg nvTpiqZ		masked.email@jpmchase.com
mFlqc WvWG		masked.email@jpmchase.com
blccB gRIA		masked.email@jpmchase.com

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Set Up New User In Healthcare Link

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Jarek W. Help Log Off

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USER MANAGEMENT

Set Up New Users

Modify Existing Users

Click **User Management** from the Healthcare Link main menu

Select **Set Up New Users** to display the Set Up New Users screen

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Items 0 Search Users

<input type="checkbox"/>	J.P. Morgan Access ID	First and Last Name	Email
--------------------------	-----------------------	---------------------	-------

There are no users pending HCL entitlements at this time

VIEW EXISTING USERS

If there are no new users to set up, click on the **View Existing Users** button to go to the Modify Existing Users table where entitlements and screens can be added

ADD ENTITLEMENTS

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Set Up New User In Healthcare Link

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USER MANAGEMENT

Set Up New Users

Modify Existing Users

1 Click **User Management** from the Healthcare Link main menu

2 Enter any term or partial term (username, user type, email, etc.) into the search bar and filter the table by that term

3

4 Select **Modify Existing Users** to display the Modify Existing Users screen

Select a user to edit their information, modify their screen and feature entitlements, and view the details of their account. Multiple users can be selected at a time

	First and Last Name	Status	User Type	Email	Last Log On
<input type="checkbox"/>	J.A6-6767217	Active	Enhanced User	jarek.w@jpmorgan.com	04/15/2021 04:25:46 PM
<input type="checkbox"/>	Jarek W.	Active	Basic User	jarek.w@jpmorgan.com	04/14/2021 09:56:40 AM
<input type="checkbox"/>	Jarek W.	Active	Treasury User	jarek.w@jpmorgan.com	04/14/2021 09:58:42 AM
<input type="checkbox"/>	John Doe	Active	SA	john.doe@jpmorgan.com	04/15/2021 01:06:37 PM
<input type="checkbox"/>	Jarek W.	Active	Basic User	jarek.w@jpmorgan.com	04/02/2021 10:40:57 AM
<input type="checkbox"/>	hctestusermgr1	Active	Enhanced User	hctestusermgr1@jpmorgan.com	
<input type="checkbox"/>	hctestusermgr2	Active	Basic User	hctestusermgr2@jpmorgan.com	
<input type="checkbox"/>	hctestusermgr3	Active	Basic User	hctestusermgr3@jpmorgan.com	03/24/2021 04:21:27 PM
<input type="checkbox"/>	hctestusermgr4	Active	Basic User	hctestusermgr4@jpmorgan.com	03/10/2021 03:42:02 PM
<input type="checkbox"/>	hctestusermgr5	Active	Enhanced User	hctestusermgr5@jpmorgan.com	
<input type="checkbox"/>	hctestusermgr6	Active	Basic User	hctestusermgr6@jpmorgan.com	02/08/2021 03:48:24 PM
<input type="checkbox"/>	hctestrestrictedpatient	Active	Restricted Patient User	hctestrestrictedpatient@jpmorgan.com	04/09/2021 05:00:11 PM
<input type="checkbox"/>	masked.email@jpmorgan.com	Active	Basic User	masked.email@jpmorgan.com	
<input type="checkbox"/>	masked.email@jpmorgan.com	Active	Basic User	masked.email@jpmorgan.com	
<input type="checkbox"/>	masked.email@jpmorgan.com	Active	Basic User	masked.email@jpmorgan.com	
<input type="checkbox"/>	masked.email@jpmorgan.com	Active	Basic User	masked.email@jpmorgan.com	
<input type="checkbox"/>	masked.email@jpmorgan.com	Active	Basic User	masked.email@jpmorgan.com	
<input type="checkbox"/>	masked.email@jpmorgan.com	Active	Basic User	masked.email@jpmorgan.com	
<input type="checkbox"/>	masked.email@jpmorgan.com	Active	Basic User	masked.email@jpmorgan.com	

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VIEW DETAILS ADD SCREEN/FEATURE ENTITLEMENTS EDIT USERS 1 User Selected

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Modify Existing User In Healthcare Link

Users

J.P. Morgan Access ID	First and Last Name	Status	User Type	Email
00000000000000000000000000000000	julia.walsh@jpm.com	Active	Enhanced User	julia.walsh@jpm.com
00000000000000000000000000000000	julia.walsh@jpm.com	Active	Basic User	julia.walsh@jpm.com
00000000000000000000000000000000	Tony Tony	Active	Treasury User	tony.tony@jpm.com
00000000000000000000000000000000	Mike Barry	Active	SA	mike.barry@jpm.com
00000000000000000000000000000000	JoanMorgan1	Inactive	Basic User	joanmorgan1@jpm.com
00000000000000000000000000000000	JoanMorgan2	Inactive	Enhanced User	joanmorgan2@jpm.com
00000000000000000000000000000000	JoanMorgan3	Inactive	Basic User	joanmorgan3@jpm.com
00000000000000000000000000000000	JoanMorgan4	Inactive	Basic User	joanmorgan4@jpm.com
00000000000000000000000000000000	JoanMorgan5	Inactive	Enhanced User	joanmorgan5@jpm.com
00000000000000000000000000000000	JoanMorgan6	Inactive	Basic User	joanmorgan6@jpm.com
00000000000000000000000000000000	Nate Bender	Active	Restricted Patient User	nate.bender@jpm.com
00000000000000000000000000000000	gjkf@orgmail.net	Active	Basic User	gjkf@orgmail.net
00000000000000000000000000000000	andrews.karl@usbank	Active		andrews.karl@usbank
00000000000000000000000000000000	Glenn, Jeffrey	Active		glenn.j@jpm.com
00000000000000000000000000000000	JoanMorgan7	Active		joanmorgan7@jpm.com
00000000000000000000000000000000	Tony Walcott	Active		tony.walco@jpm.com
00000000000000000000000000000000	jeff@jpm.com	Active		jeff@jpm.com
00000000000000000000000000000000	Matthew Allen	Active		matt.allen@jpm.com
00000000000000000000000000000000	gKCKwPO lazfp	Active		gkckwpo@jpm.com

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After viewing the user(s) details, the user can be edited (click the **Edit** button) or the Details pane can be closed (click the **Close** button)

Click the box to the left of the J.P. Morgan Access ID to select a user. Multiple users may be selected at a time to View Details or Edit Entitlements

After viewing the user(s) details, the user can be edited (click the **Edit** button) or the Details pane can be closed (click the **Close** button)

After selecting one or more users, click on the **View Details** button at the bottom of the table to open the View Details pane on the right side of the table

3

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Set Up New User In Healthcare Link

Modify Existing User In Healthcare Link

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Items 22 Search Users

Modify Existing Users

Place a check mark beside the screen or feature to be added to the user's account access

1

2

Click on the **Next** button to review the screen and feature selections made for the user

ADD SCREEN / FEATURE ENTITLEMENTS

Select Screens & Features

Select the screens & features that you would like to add to your selected users' existing entitlements.

0 Selected Screens & Features

- ☐ All Screens And Features (6)
- ☐ Manual Posting - Assigned
- ☐ Reconciliation Manager
- ☐ Search (3)
- ☐ Reconciliation Manager Enterprise

Next

VIEW DETAILS ADD SCREEN/FEATURE ENTITLEMENTS EDIT USERS 1 User Selected

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Modify Existing User In Healthcare Link

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Modify Existing Users

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Items 22 Search Users

☐ J.P. Morgan Access ID
☒ 0E91AC47-4EB0-4E45-B7A6-07F7217FFA34
☐ hctestrandomuser
☐ hctesttreasuryuser
☐ hctestuser
☐ hctestusergmt1
☐ hctestusergmt2
☐ hctestusergmt3
☐ hctestusergmt4
☐ hctestusergmt5

Add Screen / Feature Entitlements
Review
 The following screens and features will be added to your selected users' existing entitlements:
 Manual Posting - Assigned

Select Screens & Features Review

Last Log On
 04/15/2021 04:25:46 PM
 04/14/2021 09:56:40 AM
 04/14/2021 09:58:42 AM
 04/15/2021 01:06:37 PM
 04/02/2021 10:40:57 AM
 03/24/2021 04:21:27 PM
 03/10/2021 03:42:02 PM
 02/08/2021 03:48:24 PM
 04/05/2021 05:00:11 PM

Click on the **Cancel** button to return to the User Management table without making any changes to the user's screens or entitlements

Click on the **Previous** button to return to the Select Screens & Features window and edit the selections for the user's screens and features

Review the list of screens and features selected for the user and click the **Add Entitlements** button to register the user's access for these items

CANCEL PREVIOUS ADD ENTITLEMENTS

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VIEW DETAILS ADD SCREEN/FEATURE ENTITLEMENTS EDIT USERS 1 User Selected

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Set Up New User In Healthcare Link

Modify Existing User In Healthcare Link

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Edit Users

Selected Users (1)

You are editing the entitlements of the following users:

⚠ This user already has Healthcare Link entitlements. If you proceed, their entitlements will be replaced.

> ⚠ Julie [REDACTED]

1 Clicking on the **Edit Users** button after selecting a user or users on the User Management table will open the Edit Users screen. The user or users to be edited will be displayed at the top of the screen

Assign User Type for Selected Users

☒ Basic User

This user type has basic access to the application. Based on entitlements assigned to them, Basic Users can use Search and work their assigned items in Manual Posting, Reconciliation Manager, and/or Reconciliation Manager Enterprise.

☐ Enhanced User

This user type has Admin-like privileges, and will by default see the Dashboard, Reports and Self-Service features. Based on entitlements assigned to them, Enhanced Users can use Search and both assign work and work items in Manual Posting, Reconciliation Manager, and/or Reconciliation Manager Enterprise.

☐ Treasury User

This user type has basic access to the application, and will by default see the Dashboard, including a special, Treasury User-only, Payments Summary dashboard. Based on entitlements assigned to them, Treasury Users can use Search and view items in Manual Posting, Reconciliation Manager, and/or Reconciliation Manager Enterprise.

☐ Restricted Patient User

This user type has restricted access and only has rights to view Patient Search.

NEXT

CANCEL

3 Click the **Next** button to continue assigning aspects to the user's profile

2 Assign a user type from the options available. This selection will be applied to all the users selected and displayed at the top of the screen

Edit Entitlement

Select Divisions

Select Divisions

Select Screens & Features

Review

Confirm

Select the divisions you would like Julie McArthur to have entitlements to.

3 Selected Divisions

<input type="checkbox"/>	Division Name
<input checked="" type="checkbox"/>	Demo Website Division
<input checked="" type="checkbox"/>	Demo Website Division - Advanced Radiology
<input checked="" type="checkbox"/>	Demo Website Division - Quest Diagnostics - Denver

Select which division the user will be able to see information from by placing a check mark next to a division

4

Click the **Next** button to continue editing the user's profile

5

NEXT

CANCEL

Edit Entitlement

Select Screens & Features



Select the screens and features you would like Julie to have entitlements to.

5 Selected Screens & Features

<input checked="" type="checkbox"/> All Screens And Features (6)
<input type="checkbox"/> Manual Posting - Assigned
<input checked="" type="checkbox"/> Reconciliation Manager
<input checked="" type="checkbox"/> Search (3)
<input checked="" type="checkbox"/> Reconciliation Manager Enterprise

Select which screens the user will be able to see by placing a check mark next to each screen

NOTE: Make sure to expand screens that have an arrow next to them to reveal more screen options

PREVIOUS

7

NEXT

Click the **Next** button to continue editing the user's profile

CANCEL

Set Up New User In Healthcare Link

Modify Existing User In Healthcare Link

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User Management
Reports

Edit Entitlement
Review

Select Divisions
Select Screens & Features
Review
Confirm

Selected User

User Profile | Julie

J.P. Morgan Access ID
hctestrandomuser

First and Last Name
Julie

Email
julie.morgan@jpmorgan.com

User Type

Basic User

This user type has basic access and is only able to access Search and their Assigned Posting work.

Divisions

Demo Website Division - Advanced Pathology

Demo Website Division

Demo Website Division - Quick Diagnostics - Demo

Screens and Features

Reconciliation Manager

PREVIOUS

SUBMIT CHANGES

Review all the changes and updates that have been made to a user's profile. Make sure that they have the divisions and screens and features they need to complete their assigned workflow

8

Click on the **Previous** button to return to the **Select Screens & Features** and **Select Divisions** windows and edit the selections for the user's screens and features

10

Click the **Submit Changes** button to register the updates to the user's profile

9

Click on the **Cancel** button to return to the User Management table without making any changes to the user's screens or entitlements

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CANCEL

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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

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

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