

# J.P. Morgan Access<sup>®</sup>

## What's New In Healthcare Link<sup>®</sup> Manual Posting Feature Updates



J.P.Morgan

## What's New In HCL?

Healthcare Link is integrated within J.P. Morgan Access®:

- 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

## What's New In MANUAL POSTING?

**Healthcare Link Manual Posting** allows you to assign exceptions and correspondence work created during 835 image conversion. You can view the images and key the data into your own accounts receivable or practice management system.

Manual posting work can be assigned by an Enhanced User/Admin or it can be randomly assigned to a group sharing a workload.

The following has been updated:

- Posting is quicker and easier with the new user interface. A persistent search bar, configurable default table parameters, and filter-by-column allow precise and comprehensive processing.
- User actions for each item are available at the bottom of each table and detailed view screen. Basic users can **Post**, **Place On Hold**, and **Add Notes**. Enhanced users can **Assign** and **Unassign** items in addition to the actions available to basic users.
- For enhanced users the **Dashboard** view presents an overview of the posting progress, transaction types involved, and the overall status. Users entitled to see the dashboard can link directly to the manual posting information from there.
- Posting functions specific to Lockbox, Batch, or Check are directly incorporated into the enhanced user interface without needing to be selected specifically.

1. The **Summary** section provides a clear visual display of the total assigned items by status and dollar amount.

2. Check the box next to one or more **Assigned Item** to enable the Action buttons:

- **Post**
- **Place On Hold**
- **Add Note**

3. **View** item details and potential processing actions.

4. **Export** selected items to an Excel® spreadsheet.

**HCL Assign Posting Jobs Screen**

Manual Posting • Reconciliation

Summary  
Assigned Items Within Last 90 Days

Items Unposted	25	Items On Hold	0	Total Images to Review	53	Total Dollars Unposted / On Hold	\$5,440.35
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Filter  ×

Assigned Date Range  
Last 90 Days

Note Keyword:

Assigned Posting Items

View By Item  UNPOSTED & ON HOLD POSTED FILTERS

Showing Last 90 Days Search Items

<input type="checkbox"/>	Status	Assigned Date	Batch Date	Lockbox	Batch	Division	Payer	Payment Number	Payment Amount	Images	Transaction	Details
<input type="checkbox"/>	Unposted	11/01/2021	10/29/2021	1022601	392	27134676...		9289240	\$373.98	2	—	VIEW
<input type="checkbox"/>	Unposted	10/27/2021	10/26/2021	1022601	370	27134676...		9290637	\$468.95	2	—	VIEW
<input type="checkbox"/>	Unposted	10/27/2021	10/25/2021	1022601	360	27134676...		9287168	\$15.00	2	—	VIEW
<input type="checkbox"/>	Unposted	10/25/2021	10/13/2021	1022601	317	27134676...		1092714	\$12.54	2	—	VIEW
<input type="checkbox"/>	Unposted	10/25/2021	10/19/2021	1022601	340	27134676...		9280288	\$407.70	2	—	VIEW
<input type="checkbox"/>	Unposted	10/25/2021	10/19/2021	1022601	340	27134676...		9280737	\$313.98	2	—	VIEW
<input type="checkbox"/>	Unposted	10/25/2021	10/22/2021	1022601	353	27134676...		9283970	\$468.95	2	—	VIEW
<input type="checkbox"/>	Unposted	10/20/2021	10/18/2021	1022601	337	27134676...		6569891	\$25.00	2	—	VIEW
<input type="checkbox"/>	Unposted	10/14/2021	10/12/2021	1022601	312	27134676...		9283970	\$3.00	2	—	VIEW

POST PLACE ON HOLD ADD NOTE EXPORT

Viewing Images and History in Item Details >

The screenshot shows the 'HCL Item Details Screen' in the J.P. Morgan Healthcare Link system. The interface includes a top navigation bar with 'Home', 'Search', and 'Manual Posting'. Below this, there are sections for 'Batch Details' and 'Item Details'. The 'Batch Details' section shows information such as Batch Date (07/08/2020), Lockbox (1001), Batch (7154), Division (Demo Website Division), and Batch Amount (\$758.28). The 'Item Details' section shows Payer, Payment Number (2437), and Payment Amount (\$111.28). On the right side, there is a 'Status' dropdown set to 'UNPOSTED', and fields for Assignee, Due Date, Posted Date, Assigned Date (Jul 17, 2020), and Assigned By. Below these sections is a toolbar with navigation and annotation tools, and a main area displaying a scanned image of a 'PROFESSIONAL PROVIDER PERMIT TANGZE YUUCHER' with various fields and a check amount of \$24.89. At the bottom, there are buttons for 'ASSIGN', 'PLACE ON HOLD', 'POST', 'UNASSIGN', and 'ADD NOTE'. Three orange callout boxes with numbers 1, 2, and 3 are overlaid on the screen: callout 1 points to the 'Assigned Date' field, callout 2 points to the scanned image, and callout 3 points to the 'History (1 Note)' tab.

1. Details are displayed clearly at the top of the page.
2. Scanned images can be selected, viewed, and annotated.
3. The **History** tab contains searchable notes about the item.

**1**

**HCL Random Postings**

**2**

**3**

**Your Posting Queue**  
Summary of your Unposted & On Hold Items (Last 90 Days)

Items Pending	Items On Hold	Total Dollars Unposted / On Hold	Total Images to Review	Total Items Unposted	Total Dollars Unposted
1	0	\$112.97	3	7	\$1,979.39

**Filter**

Assigned Date Range  
Last 90 Days

Note Keyword:

**Random Posting Items**

UNPOSTED **ON HOLD** POSTED

Showing Last 90 Days

**No On Hold Items Found**  
This could be due to your specified filters. Please refine your filters to view data.

Page Size 25

0 to 0 of 0

A division can be set up so that items are assigned randomly to users from a common pool of items requiring posting.

- 1. Your Posting Queue** displays a summary of information about the items remaining to be posted.
- The **Division's Queue** displays Total Dollars Unposted for the divisions selected in the drop-down box (All selected by default).
- Select specific date ranges and keywords to filter the data. Use the **Get Started** button (if visible) to populate the Random Posting table with items from the Division selected in the drop-down menu in the **Division's Queue**.

**J.P.Morgan | Healthcare Link** Ashok B. Help Log Off

Home Manual Posting Reconciliation Reports

Views All Divisions Custom Date Range 01 Nov 2020 - 31 Dec 2020 06/21/2021 11:45 AM ET

### Manual Posting

**Dollars Breakdown**

Grand Total: **\$1,014,359.09**

Status	Amount
Posted	\$46,194.94
Unposted	\$968,081.26
On Hold	\$82.89

**Transaction Types**

Transaction Type	Count
Exceptions	851
Letters	6,618
EOB	130

**Items By Status**

Status	Count
Unposted	7922
On Hold	1
Posted	17

⚠ You have 63530 Unposted Items older than one week

[VIEW MANUAL POSTING](#)

1. The dashboard is the default view for users entitled with dashboard access. Click the **Home** menu item to return to the dashboard at any time.
2. The **Manual Posting** pane provides insight into the posting transaction information over the time period and division selected.
3. Click the **VIEW MANUAL POSTING** button to go directly to the posting table.



**1** points to the 'View By Item' dropdown menu.

**2** points to the 'Lockbox' and 'Payment Number' columns in the table.

**HCL View By Item Table**

Status	Assignee	Batch Date	Lockbox	Division	Payer	Payment Number	Amount	Images	Notes	Details		
<input checked="" type="checkbox"/>	Unposted	Unassigned	12/02/2020	277651	462	Demo Website Division	United Health	9416276	\$35,025.00	4	NOTES (1)	VIEW
<input type="checkbox"/>	Unposted	Unassigned	12/02/2020	277651	462	Demo Website Division	United Health	9416273	\$40.00	3	NOTES (5)	VIEW
<input type="checkbox"/>	Unposted	Unassigned	12/02/2020	277651	462	Demo Website Division	Unknown or ...	154889	\$580.00	4	NOTES (1)	VIEW
<input type="checkbox"/>	Unposted	Unassigned	12/02/2020	277651	462	Demo Website Division	Unknown or ...	36314	\$178.18	3	NOTES (1)	VIEW
<input type="checkbox"/>	Unposted	Unassigned	12/02/2020	277651	462	Demo Website Division	Unknown or ...	29060760	\$866.81	3	NOTES (1)	VIEW
<input type="checkbox"/>	Unposted	Unassigned	12/02/2020	277651	462	Demo Website Division	Unknown or ...	12889705	\$242.24	3	NOTES (1)	VIEW

1. Choose **View by Item** for Lockbox or Check based selections.
2. Use the column filtering to narrow the table down per whatever criteria needed.

**3** points to the 'View By Batch' dropdown menu.

**HCL View By Batch Table**

Assignee	Total Items	Items Posted	Batch Date	Lockbox	Batch	Division	Batch Amount	Images	Details
<input type="checkbox"/>	4	All Posted	07/07/2020	1001	7150	Demo Website Division	\$758.28	28	VIEW
<input type="checkbox"/>	4	All Posted	07/07/2020	1001	7145	Demo Website Division	\$758.28	28	VIEW
<input type="checkbox"/>	4	All Posted	07/07/2020	1001	7149	Demo Website Division	\$758.28	28	VIEW
<input type="checkbox"/>	4	All Posted	07/07/2020	1001	7146	Demo Website Division	\$758.28	28	VIEW
<input type="checkbox"/>	78	6	07/08/2020	1001	7151	Demo Website Division	\$2,208.36	915	VIEW
<input type="checkbox"/>	1	0	07/08/2020	1001	7153	Demo Website Division	\$200.00	1	VIEW
<input type="checkbox"/>	4	0	07/08/2020	1001	7154	Demo Website Division	\$758.28	28	VIEW

3. Choose **View by Batch** to select items per specific batches.

# FAQs



## FAQs

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- > **How will I log in?**

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.
- > **What is the retention period for images?**

The retention period for images will be 10 years.
- > **What can I expect to receive as part of the process of logging into J.P. Morgan Access®?**
  - Existing J.P. Morgan Access® SAs and users will be able to log in via J.P. Morgan Access® using existing log in credentials.
  - New J.P. Morgan Access® SAs and users will receive one-time automated emails on their migration date with a J.P. Morgan Access® User ID and temporary password. SAs will also receive a text message with soft token credentials.
- > **How do I manage entitlements for users in J.P. Morgan Access®?**

For any J.P. Morgan Access® specific setups or questions, click on **Help** within the J.P. Morgan Access® portal, navigate to Administration, then reference the various user guides. The entire user guide can be downloaded via the upper right corner by clicking on Download User Guide.
- > **What browser(s) can I leverage for Healthcare Link?**

Google Chrome, Mozilla Firefox, and Microsoft Edge. Healthcare Link will not be accessible through Safari and IE11.
- > **How would I export data from a screen?**

Any view can be exported by selecting export on the top right of the screen(s). Output format will be an Excel spreadsheet.

## FAQs

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- **Where do I find the ACH Report, to reconcile between my bank deposits and my PAS?**  
The ACH Report is part of the Deposit Detail Report, within the Reports module.
- **Why would I not see specific screens as shown in the User Guide, i.e. within the Dashboard or specific screens?**  
Screens are based on Entitlements granted.
  - An Enhanced User or a Treasury User can view the Dashboard. The widgets / graphs included in the dashboard and other screens available to users are contingent upon what screens the user has been granted entitlements to. An Enhanced User can assign items to other users.
  - A Basic User can view work that is assigned.
  - A Restricted Patient User can access Patient Search screens only.
- **Where do I find the file details for a distributed file, EPIC files and Image files?**  
The file name and distribution date associated with the Returned ERA, can be viewed via the Outbound File Report.
- **Where do I find the Lockbox Report, showing me all the files scanned and transferred from a lockbox into HCL?**  
The Lockbox details are included in the Deposit Detail Report, within the Reports module.
- **Where do I find all the Incoming 835 remittance files, and other files we send to JPMC?**  
The Inbound Files (the files clients send to JPMC) are found within the Reports module. You can view all Inbound EOBs, PAS and BAI files at a glance to see what came in and when.
- **Where do I find the 835 payment details, 835 splits and the Outbound files?**  
The Outbound Files are found within the Reports module. You can view all files that are “outbound” to verify that HCL has process the Inbound file and have reconciled payments and remittances.

# Glossary



# Glossary

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

Term/Acronym	Description
<b>ACH</b>	Automated Clearing House. A check clearing facility operated for the convenience of the banks in a particular region, generally through the regional Federal Reserve bank. Automated clearing houses electronically process interbank credits and debits. They may also handle the electronic transfer of government securities and client services such as the automatic deposit of clients' wages, direct deposit of Social Security checks, and pre-authorized payments of bills by banks.
<b>Account Number</b>	Number encoded on checks (or other documents) to identify the holder of the bank account number.
<b>Artificial Intelligence (AI)</b>	Machine learning is an application of artificial intelligence that provides systems the ability to learn without being explicitly programmed. JPMorgan Chase applies AI to enhance the Optical Character Recognition (OCR) engine for the most advanced paper EOB conversion technology currently available.
<b>Assignee</b>	The person in which the item is assigned to. Assignee name is displayed.
<b>Assigned Date</b>	The date the task is assigned by the Enhanced User.
<b>Assigned By</b>	The name of the individual who assigned the item.
<b>Batch</b>	Number of items (i.e., scanned images in the lockbox) processed at one time to form a bundle of work.
<b>Batch Amount</b>	The dollar amount of all checks within the batch.
<b>Batch Date</b>	The date on which the batch was created by the J.P. Morgan lockbox or image vendor.
<b>Batch/Deposit Date</b>	The date on which the batch was created by the J.P. Morgan lockbox or image vendor OR the date on which the check was deposited.
<b>Batch Number</b>	The number assigned to a batch by J.P. Morgan.

## Glossary (cont.)

Term/Acronym	Description
<b>Check Date</b>	The date on which the check was written.
<b>Claim Count</b>	The number of processed claims. Only applicable for EOB conversion clients.
<b>Create Date</b>	The date the batch was processed by Lockbox or the date the native 835 was received.
<b>Credit</b>	Payment received by the provider from the payer / insurer.
<b>DDA</b>	Demand Deposit Account. Checking account where funds can be withdrawn at any time without prior notice to the bank.
<b>Deposit Date</b>	Date on which the check was deposited.
<b>Division</b>	A particular site or department within the provider's organization.
<b>Due Date</b>	In Manual Posting, when an Enhanced User assigns an item, they can choose to have a due date for when the item needs to be posted.
<b>EDI</b>	Electronic Data Interchange (EDI). The electronic exchange of routine business transactions. These transactions include such documents as purchase orders, invoices, inquiries, planning, acknowledgment, pricing, order status, scheduling, test results, shipping and receiving, payments, and financial reporting. EDI permits hundreds of unrelated companies to communicate and process business transactions electronically.
<b>EFT</b>	Electronic Funds Transfer. The transfer of money initiated through electronic terminal, automated teller machine, computer, telephone, or magnetic tape.
<b>EOB</b>	Explanation Of Benefits: Document specifying the outcome of a claim submitted to an insurer by a provider. The document explains why certain charges were discounted, what was covered by insurance, why a claim was denied, etc. The insurer/payer sends the document to the provider and the patient. EOBs are typically paper documents, but can be sent electronically by the insurer to the provider.

## Glossary (cont.)

Term/Acronym	Description
<b>ERA</b>	Electronic Remittance Advice. The name (given by insurers) to the electronic file, which gets posted to the provider.
<b>File Name</b>	The file name for the 835, Epic, BAI, or Indexed Image file.
<b>HIPAA</b>	Health Insurance Portability and Accountability Act of 1996.
<b>Items Posted</b>	When viewing by batch, a user can see total items in the batch and number of items posted within the batch.
<b>Latest Notes</b>	The most recent notes the user entered while working on the assigned task.
<b>Lockbox</b>	A receivables service that includes collection of checks from a designated P.O. Box, remittance, and processing of payments. Lockboxes are also known as sub-accounts, as they are linked to a DDA for pricing and billing purposes.
<b>Lockbox Number</b>	The number of the J.P. Morgan lockbox used to process the paper documents (i.e., remittance advice, explanation of benefits) from the insurer.
<b>Modifier</b>	A code used to further define a medical procedure or service.
<b>Negotiated Charge</b>	The amount the insurer has negotiated to pay the provider for a particular service/procedure.
<b>OCR</b>	Optical Character Recognition. Refers to the printed scan line of information on the bottom line of documents that is read with an optical reader.
<b>PAS</b>	Patient Accounting System.
<b>Patient Account Number</b>	A unique number associated with the patient.
<b>Patient Responsibility</b>	The amount the patient must pay the provider, as specified on the contract between the patient and the payer / insurer.
<b>Payable Amount</b>	The amount payable by the payer / insurer, i.e., the negotiated charge less any deductions such as patient responsibility, company payment, secondary payer / insurer amount, etc.

## Glossary (cont.)

Term/Acronym	Description
<b>Payer</b>	The name of the insurer.
<b>Payment Number</b>	A written order to a bank to pay another party the amount specified from funds on deposit.
<b>Payment Amount</b>	The amount of the payment in dollars.
<b>Post(ed) Date</b>	The date on which a batch, check, or transaction was posted.
<b>Returned ERA</b>	835 files returned to client.
<b>Search Criteria Pane</b>	On some screens (e.g., the <i>Image Search by Check, Patient, Batch, or Lockbox (Tree View)</i> screens), the <i>Reports</i> pane expands to hide the <i>Search Criteria</i> (and <i>Alerts</i> ) panes to increase the space available for viewing the report data. To re-display the <i>Search Criteria</i> pane, re-size the panes by clicking the small arrow on the dividing line to expand the pane.
<b>Site</b>	The location of a particular division or department within the provider's organization.
<b>Total Items</b>	Total Items in batch

## Contacting Technical Support

J.P. Morgan Client Services & Technical Support 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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