J.P. Morgan Access®

What's New In Healthcare Link®

Search Feature Updates

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What's New In HCL?

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

What's New In SEARCH?

Healthcare Link Search allows you to view transaction details and images by Lockbox batch, individual transactions, or by patient.

The following has been updated:

- Users can find the transaction information they need quicker and easier with the new user interface. A persistent search bar, configurable default search parameters, and filter-by-column allow precise and comprehensive searches.
- The Dashboard view affords an overview of transaction information and direct links to relevant search tables.
- Searches can be conducted by batch, transaction, and patient information. Search by correspondence or search by lockbox is incorporated directly into other search functions.
- The ERA File Report can now be created using the table filter features.
- Hotkeys have been replaced by user interface improvements.

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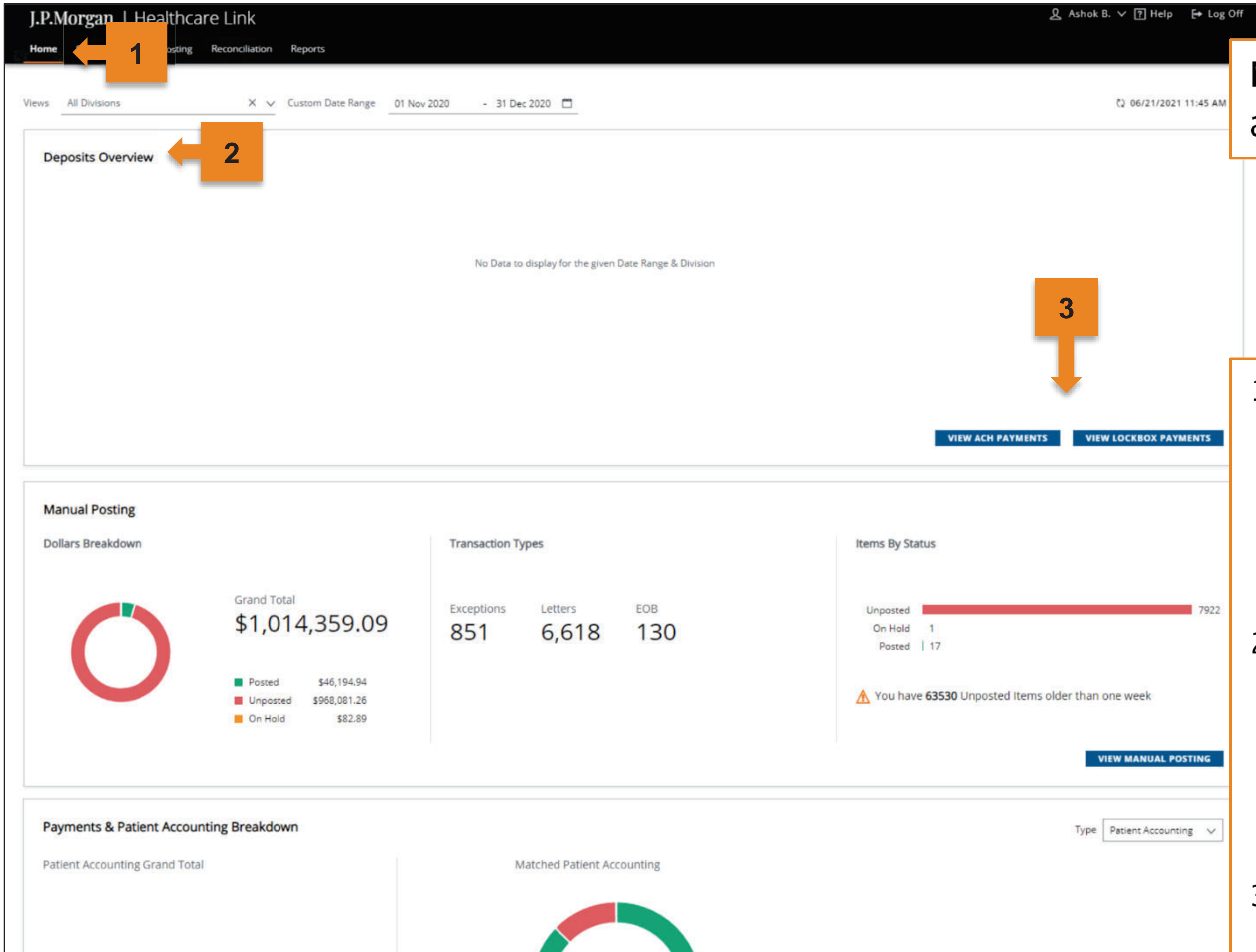

NOTE: The Dashboard is only available for Enhanced Users.

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 **Deposits Overview** pane provides insight into the transaction and lockbox information over the time period selected.
3. Click the **VIEW ACH PAYMENTS** or the **VIEW LOCKBOX PAYMENTS** to go to the search table for either item.

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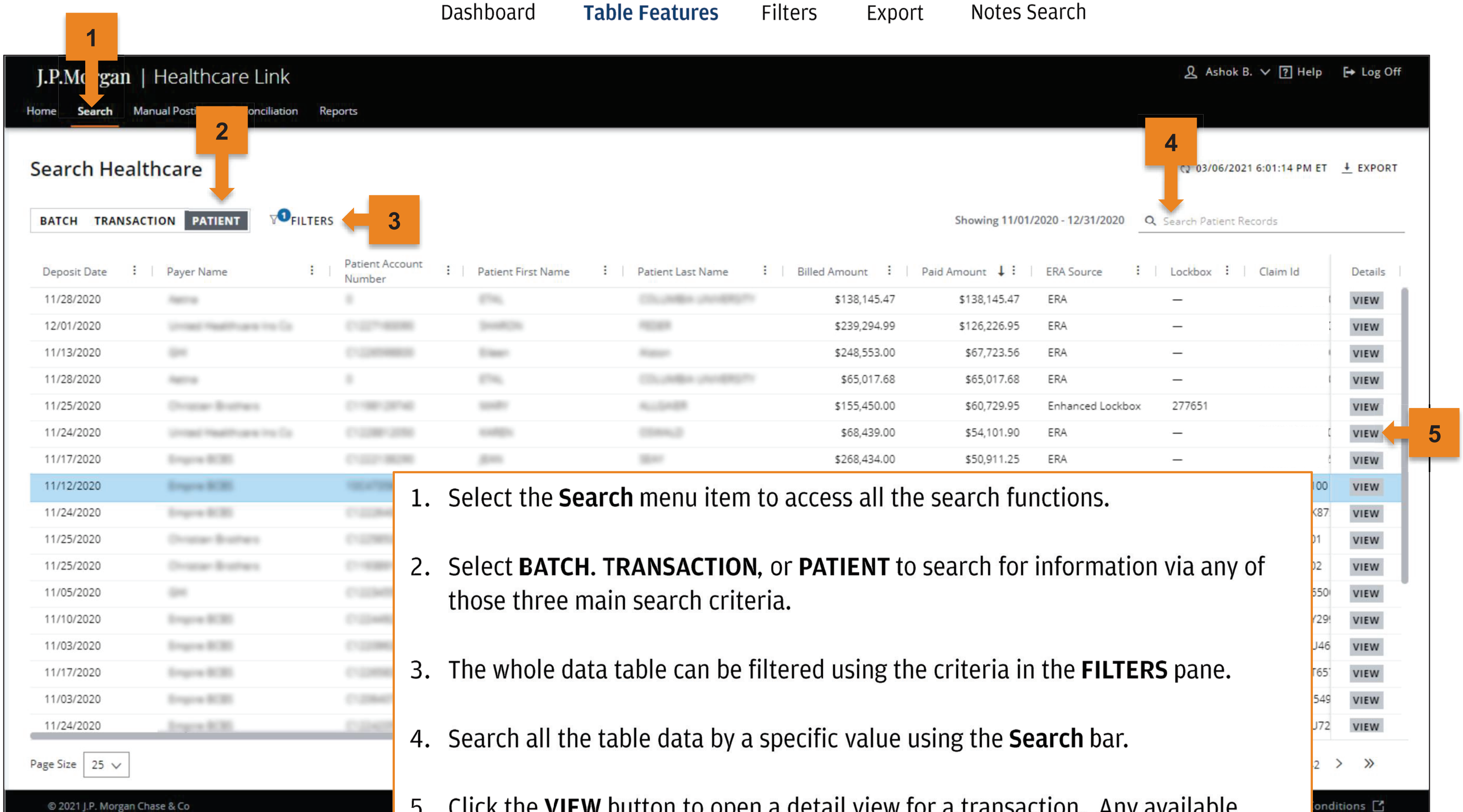

1. Select the **Search** menu item to access all the search functions.

2. Select **BATCH. TRANSACTION**, or **PATIENT** to search for information via any of those three main search criteria.

3. The whole data table can be filtered using the criteria in the **FILTERS** pane.

4. Search all the table data by a specific value using the **Search** bar.

5. Click the **VIEW** button to open a detail view for a transaction. Any available transaction images can be found there.

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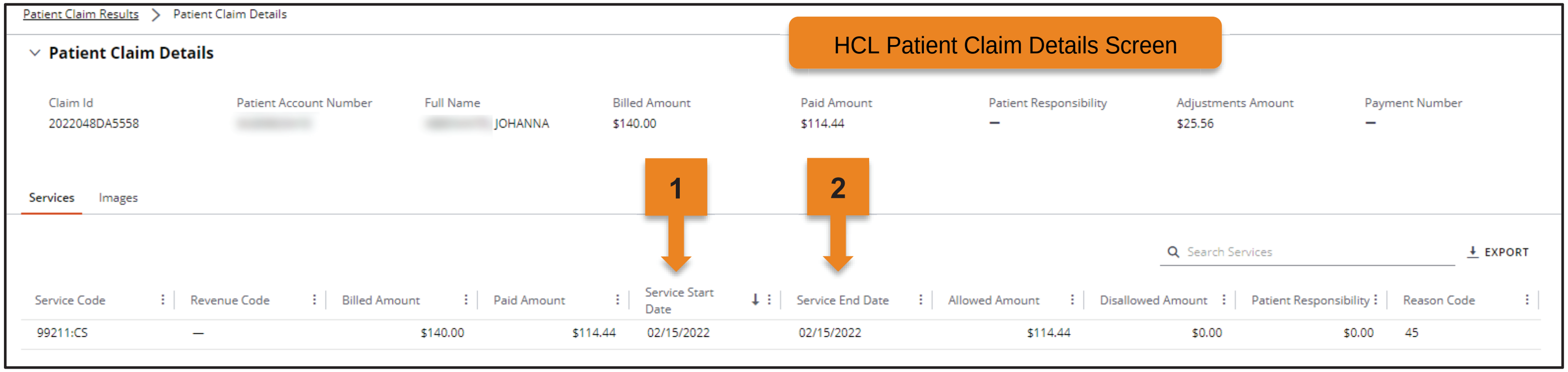

The **Service Date** field is no longer shown on the main Patient Search table in Healthcare Link.

1. In Healthcare Link 2.0 the **Patient Claims Details** view contains much more information about the claim and contains **Service Start Date** as well as...

2. ... the **Service End Date**.

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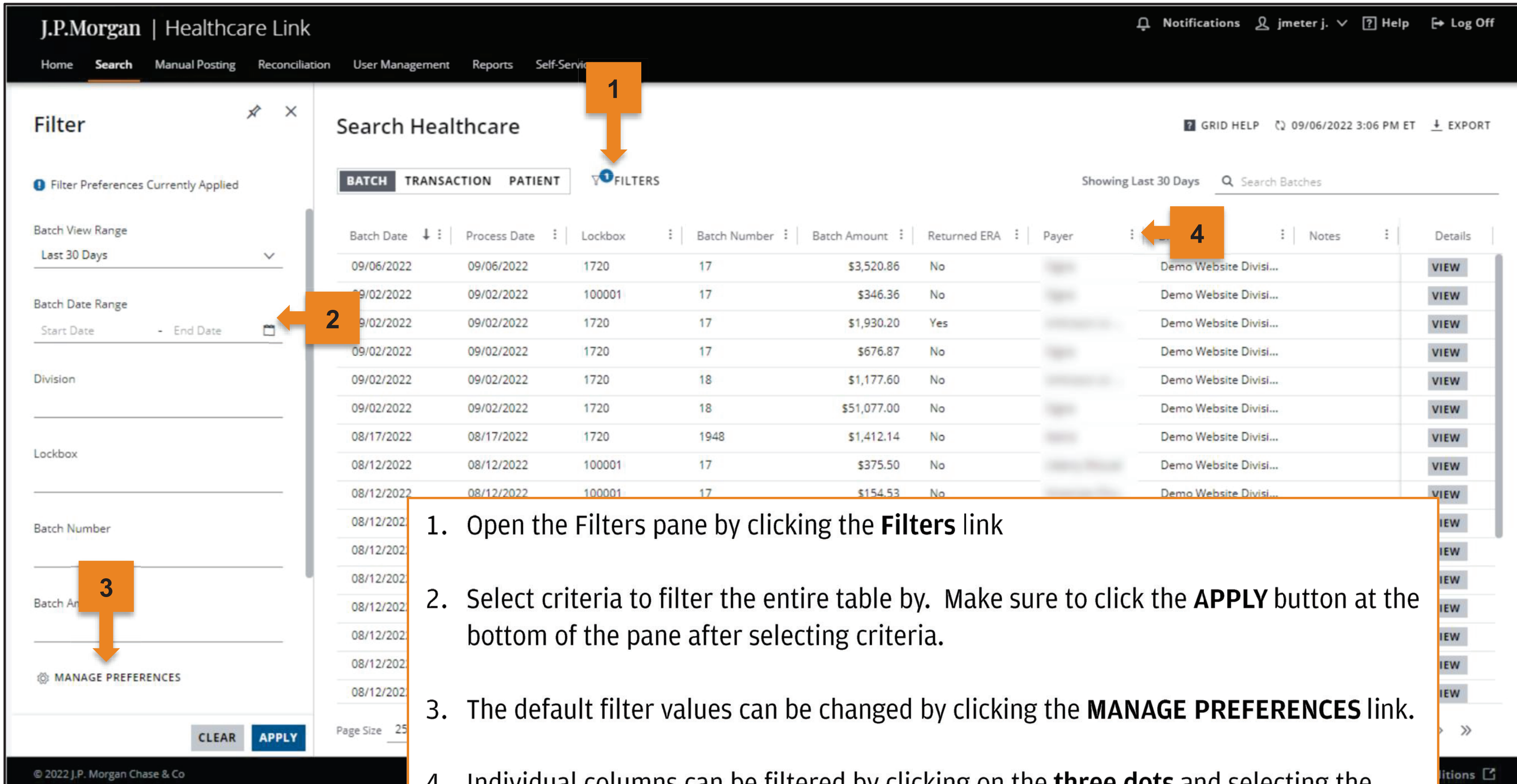

1. Open the Filters pane by clicking the **Filters** link

2. Select criteria to filter the entire table by. Make sure to click the **APPLY** button at the bottom of the pane after selecting criteria.

3. The default filter values can be changed by clicking the **MANAGE PREFERENCES** link.

4. Individual columns can be filtered by clicking on the **three dots** and selecting the filters tab. Columns that have filtering already applied have a **filter icon** beside the column name. Click the filter icon to edit the column filtering.

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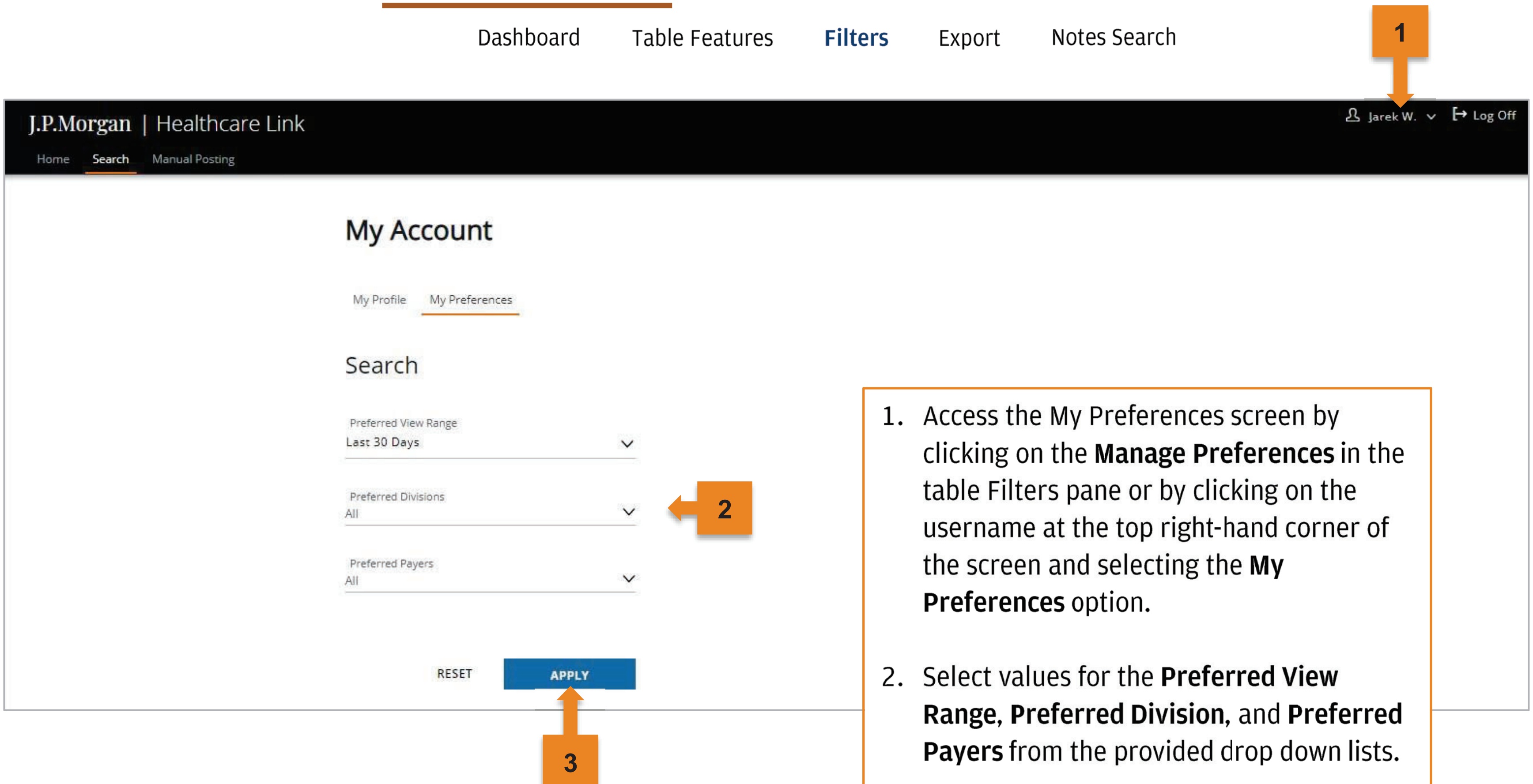

1. Access the My Preferences screen by clicking on the **Manage Preferences** in the table Filters pane or by clicking on the username at the top right-hand corner of the screen and selecting the **My Preferences** option.

2. Select values for the **Preferred View Range, Preferred Division,** and **Preferred Payers** from the provided drop down lists.

3. Click the **APPLY** button to register the changes made.

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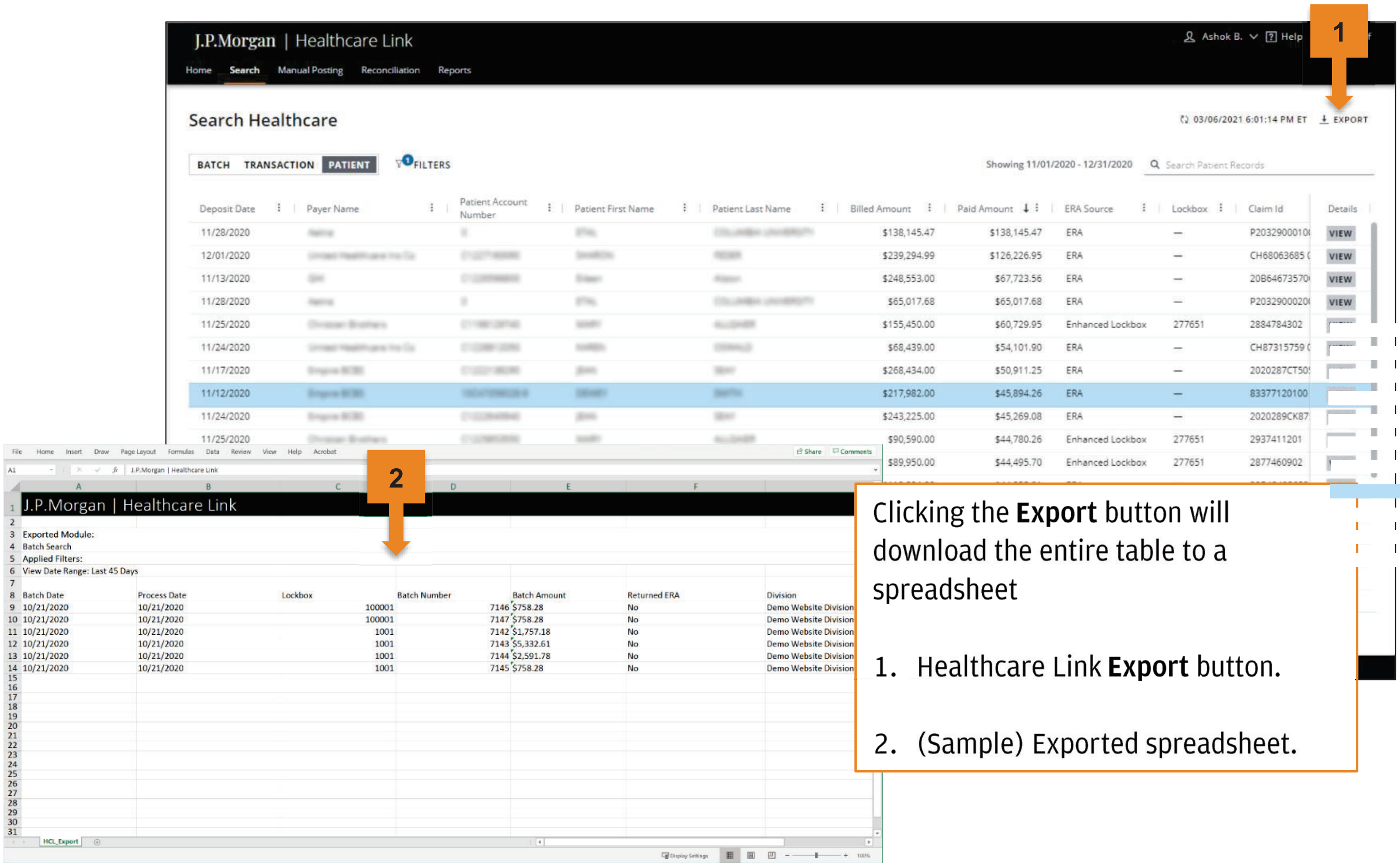

Clicking the **Export** button will download the entire table to a spreadsheet

1. Healthcare Link **Export** button.
2. (Sample) Exported spreadsheet.

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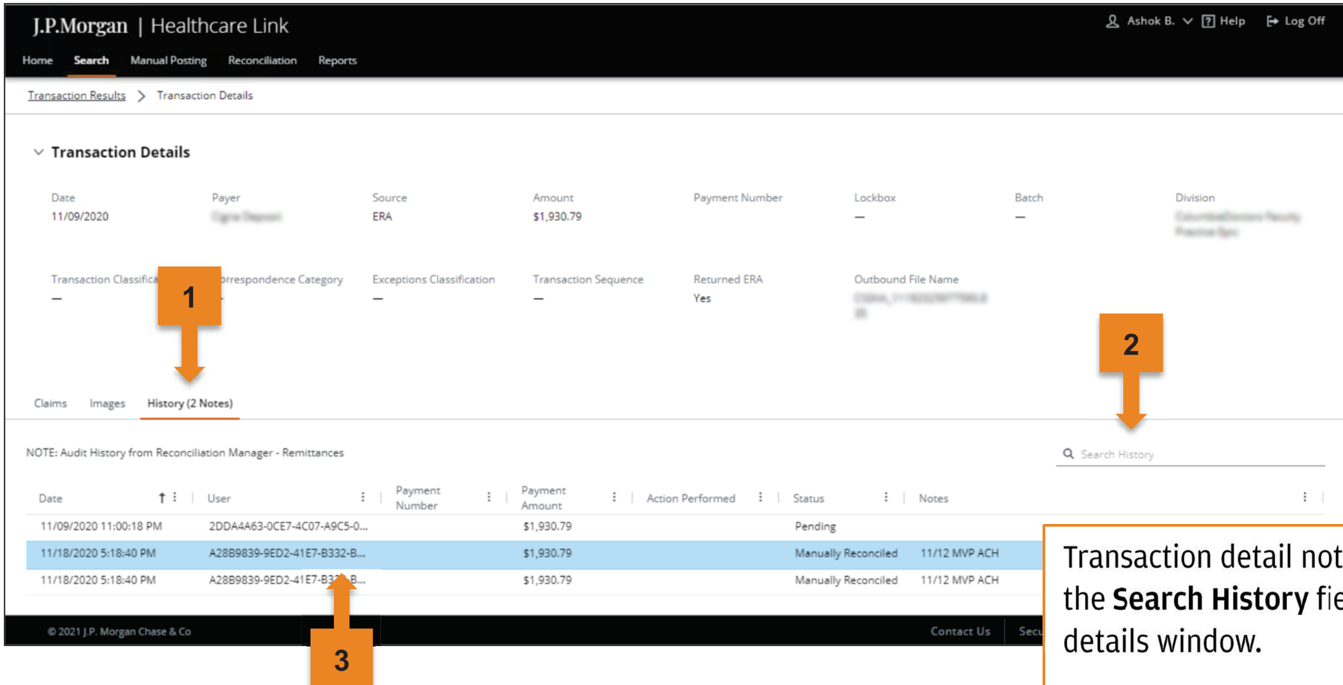

Transaction detail notes can be searched in the **Search History** field in the transaction details window.

1. Select the **History** tab.
2. Enter a value to search for in the **Search History** field.
3. Items that match the search value will automatically populate in the table.

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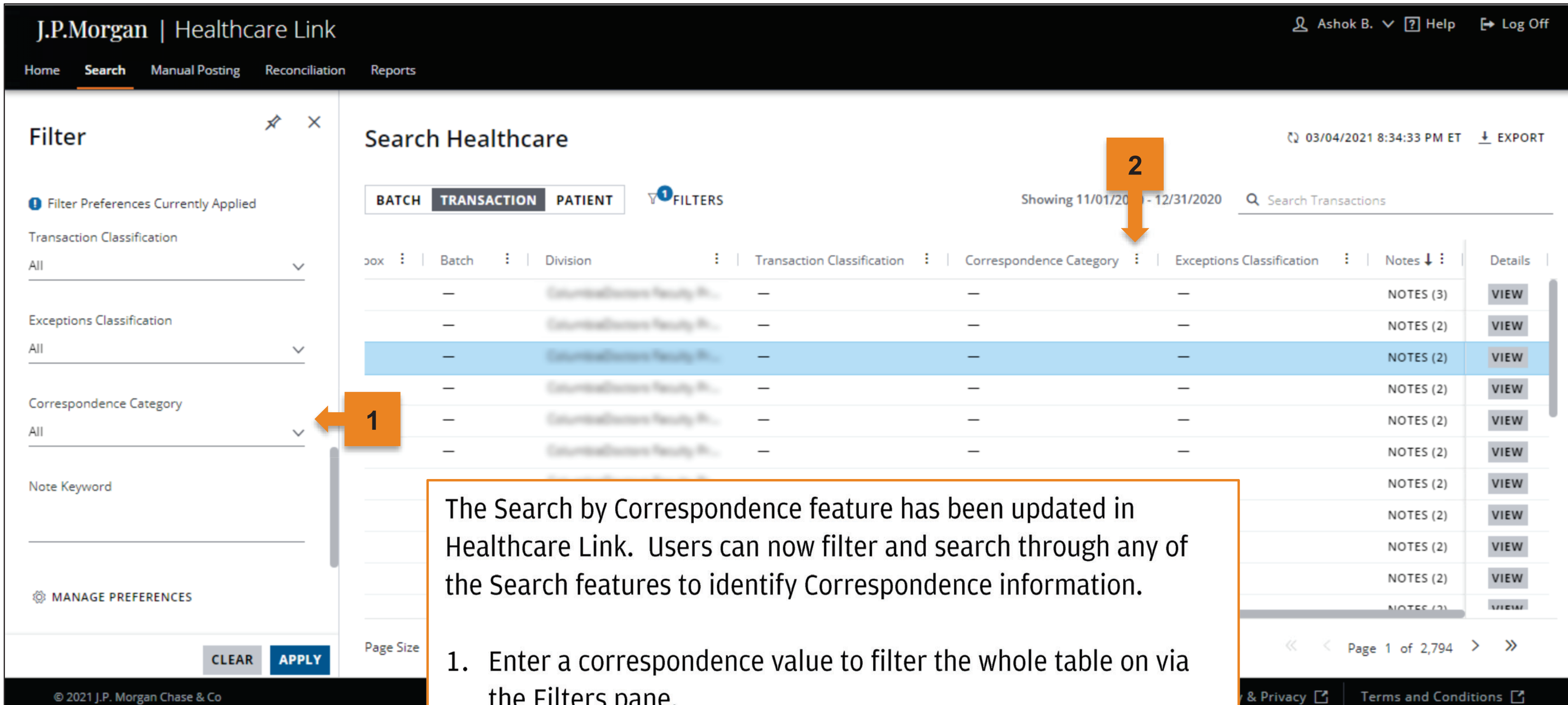

The Search by Correspondence feature has been updated in Healthcare Link. Users can now filter and search through any of the Search features to identify Correspondence information.

1. Enter a correspondence value to filter the whole table on via the Filters pane.

2. Use the filter feature on the Correspondence Column to identify and limit the information shown in the table to the correspondence value or values selected.

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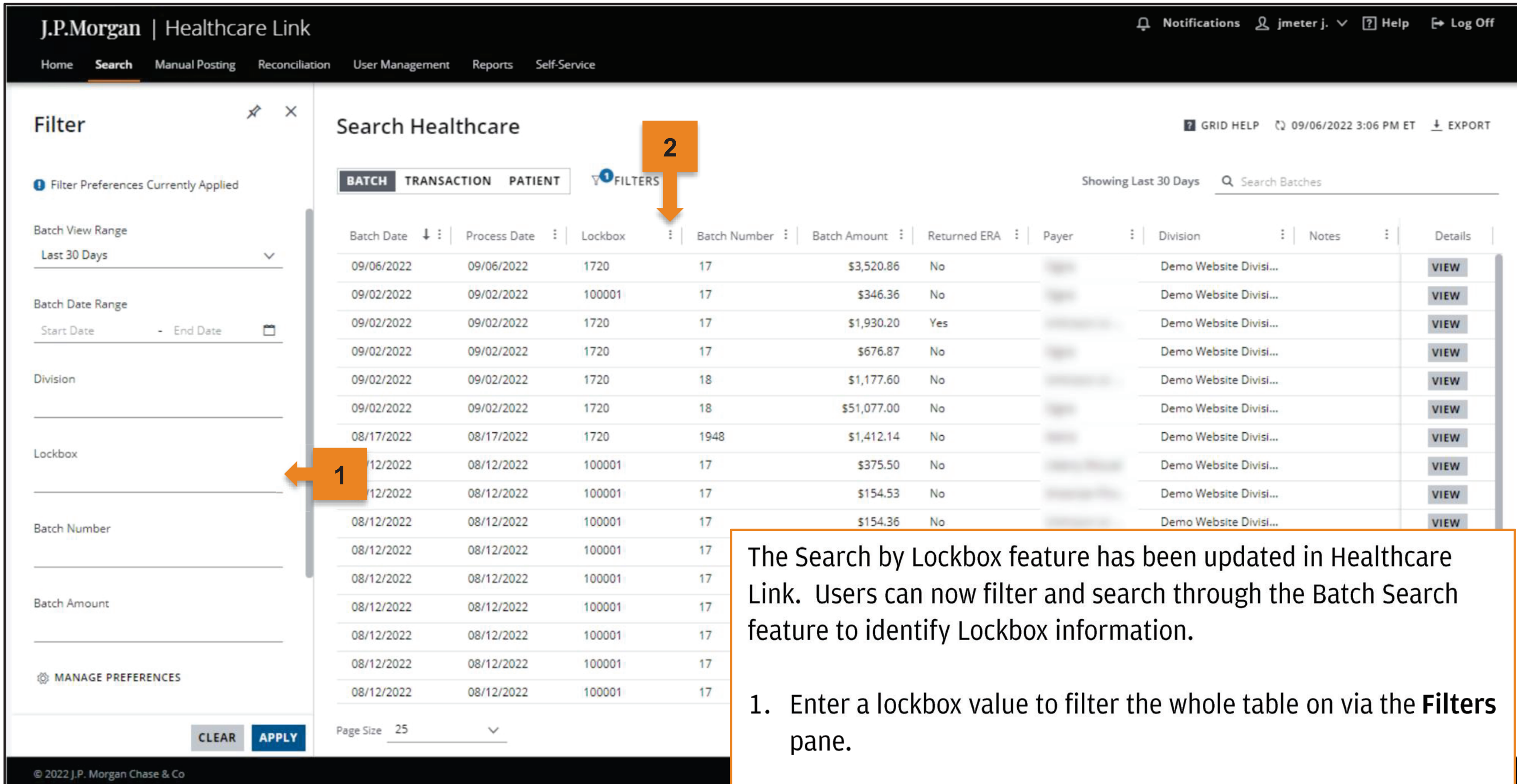

The Search by Lockbox feature has been updated in Healthcare Link. Users can now filter and search through the Batch Search feature to identify Lockbox information.

1. Enter a lockbox value to filter the whole table on via the **Filters** pane.

2. Use the filter feature on the Lockbox Column to identify and limit the information shown in the table to the lockbox value or values selected.

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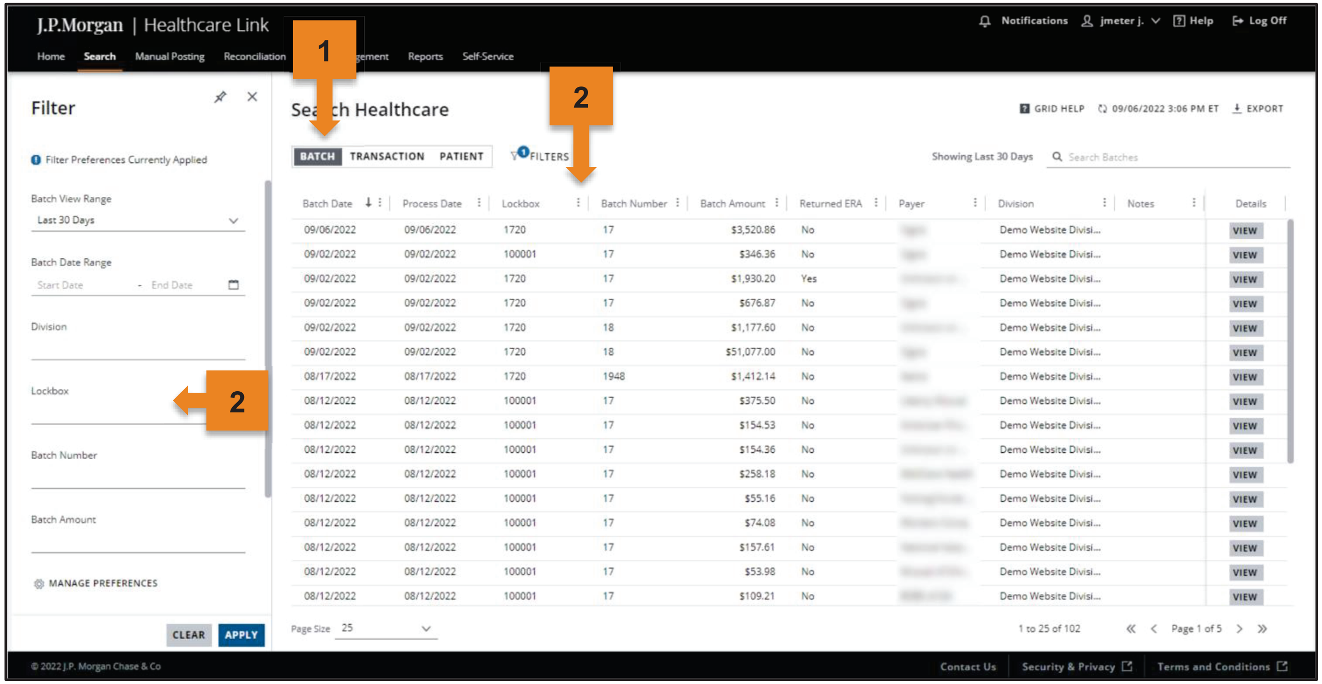
Searching for specific **Lockboxes** in Healthcare Link is done by leveraging the filtering capabilities found in the grid and search pane.

1. Search the table by **Batch.**

2. Use the **Filter** feature on the Lockbox Column – or use the Filter pane - to group the batch amounts for further analysis.



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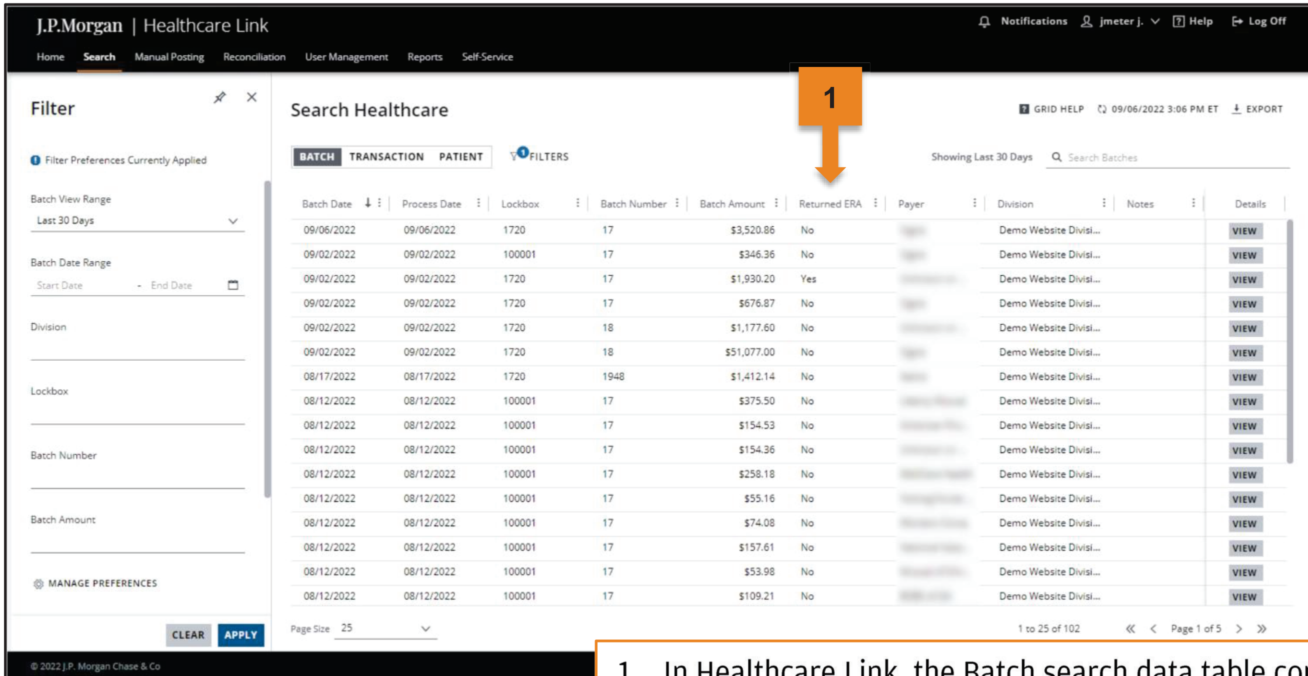

1. In Healthcare Link, the Batch search data table contains a column for Returned ERA. Users can filter the column according to the report needed for the Returned ERA information.

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FAQs

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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.

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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.

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Glossary

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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.

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Glossary (cont.)

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

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Glossary (cont.)

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

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Glossary (cont.)

Term/Acronym	Description
Payer	The name of the insurer.
Payment Number	A written order to a bank to pay another party the amount specified from funds on deposit.
Payment Amount	The amount of the payment in dollars.
Post(ed) Date	The date on which a batch, check, or transaction was posted.
Returned ERA	835 files returned to client.
Search Criteria Pane	On some screens (e.g., the *Image Search by Check, Patient, Batch*, or *Lockbox (Tree View)* screens), the *Reports* pane expands to hide the *Search Criteria* (and *Alerts*) panes to increase the space available for viewing the report data. To re-display the *Search Criteria* 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

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Contacting Technical Support

J.P. Morgan Client Services & Technical Support associates are ready to assist you with all your technical and general inquires. 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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