J.P. Morgan Access®

USER GUIDE

Healthcare Link
Image Uploader

Introduction to Healthcare Link®

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.

It allows you to systematically capture, format, and post electronic and/or paper claims and streamlines the payment processing cycle to 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.

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

Image Uploader Overview

The Image Uploader enables entering documents into HCL for storage, display, indexing, and conversion. It allows customers to upload PDF and TIFF documents directly, bypassing traditional lockbox methods. This module is designed to enhance document management efficiency and flexibility for Healthcare Link customers.

Terms & Definitions

- **Transaction:** Each transaction submitted via the Uploader should be a single EOB, but may contain multiple files.
- **File:** Each file uploaded as part of a transaction may contain multiple documents.
- **Document:** A scanned document may have multiple pages and multiple documents may be combined in a single file. However, documents from multiple EOBs should not be combined into the same file.

Key Features

- **Direct Uploads:** Allows PDF and TIFF document uploads directly to HCL, eliminating the need for physical lockbox processing.
- **Advanced Capabilities:** Supports document retention, indexing, and conversion, integrating seamlessly with existing workflows.

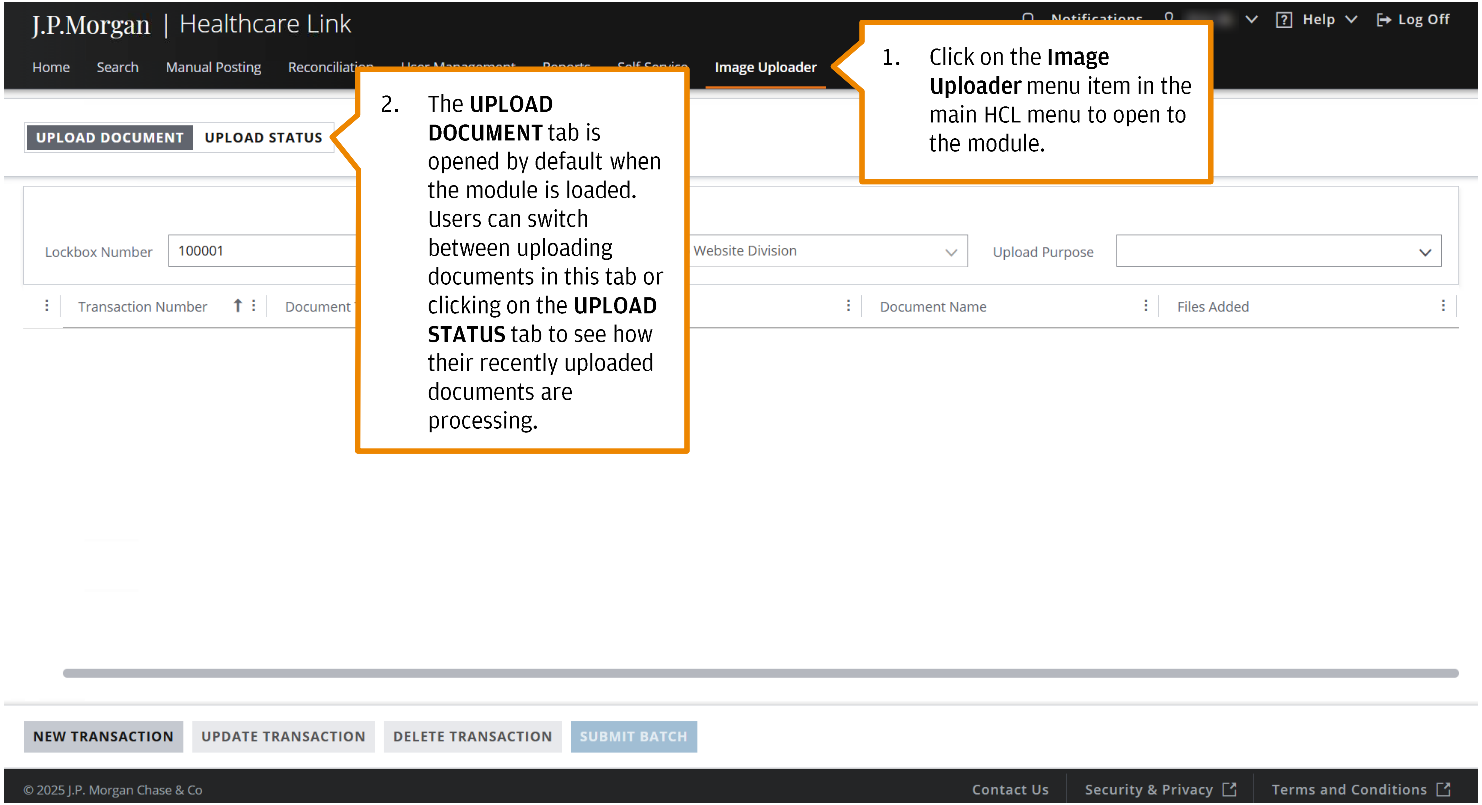
Requirements

- Requires existing lockbox configuration.
- Maximum 50 transactions per day across a maximum of 5 batches per day.
- Checks must be deposited first and then can be included for upload with the EOB.

Recommendations

The character recognition (OCR) process is the same for uploaded and lockbox scanned images, but the scanning quality can vary since users will control their image resolution when uploading directly. Therefore:

- Minimum 300 DPI image quality recommended.
- Not a replacement for the lockbox process.
- One transaction per document recommended.
- Each uploaded file should be no larger than 100mb in size.
- It is not recommended to upload more than 5,000 pages in total per day.



1. Click on the **Image Uploader** menu item in the main HCL menu to open to the module.

2. The **UPLOAD DOCUMENT** tab is opened by default when the module is loaded. Users can switch between uploading documents in this tab or clicking on the **UPLOAD STATUS** tab to see how their recently uploaded documents are processing.

  NOTE: All information included in the Healthcare Link screens in this material is a demo representation and does not reflect actual client data.

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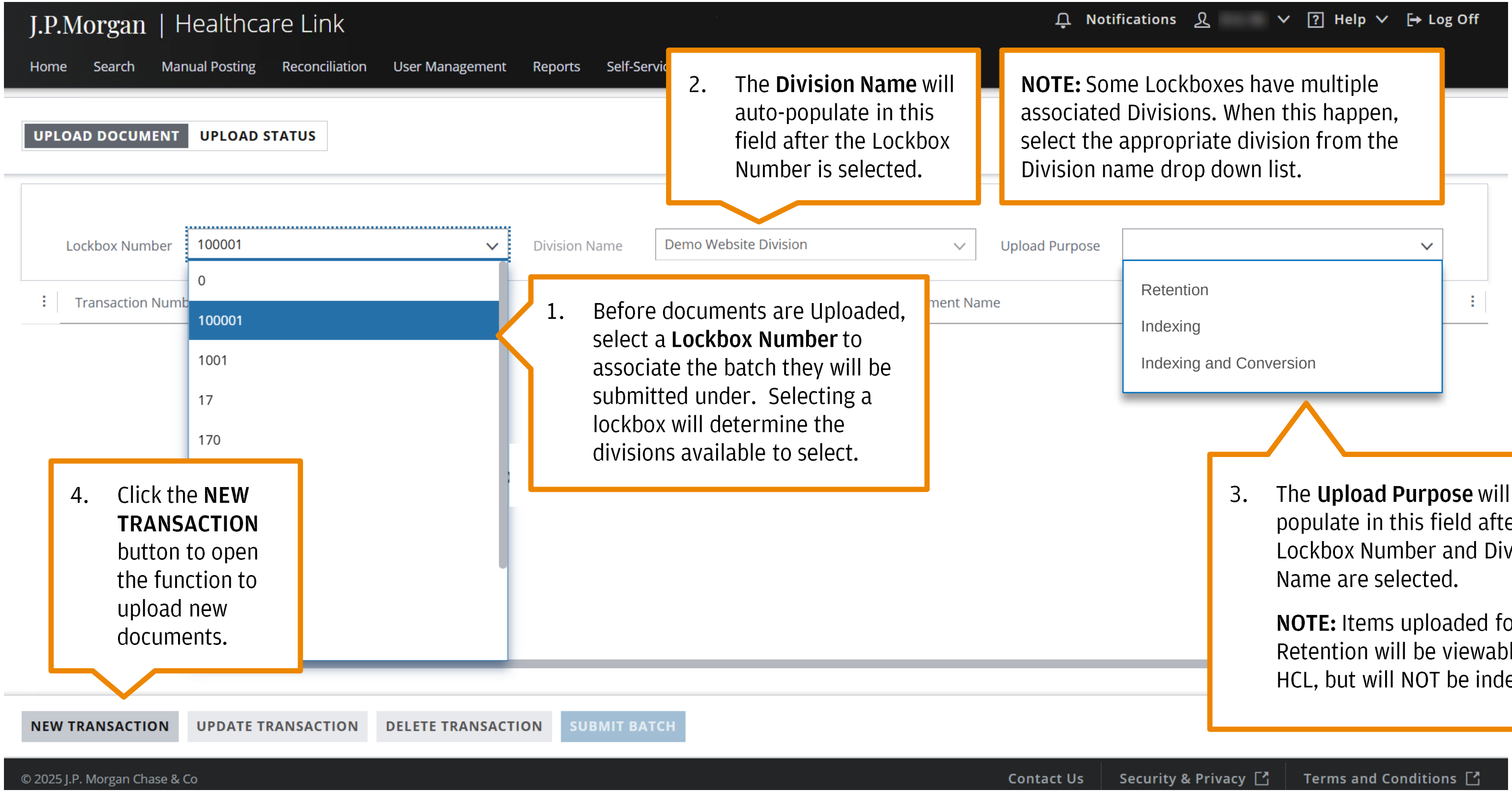

1. Before documents are Uploaded, select a **Lockbox Number** to associate the batch they will be submitted under. Selecting a lockbox will determine the divisions available to select.

2. The **Division Name** will auto-populate in this field after the Lockbox Number is selected.

NOTE: Some Lockboxes have multiple associated Divisions. When this happen, select the appropriate division from the Division name drop down list.

3. The **Upload Purpose** will auto-populate in this field after the Lockbox Number and Division Name are selected.

   NOTE: Items uploaded for Retention will be viewable in HCL, but will NOT be indexed.

4. Click the **NEW TRANSACTION** button to open the function to upload new documents.

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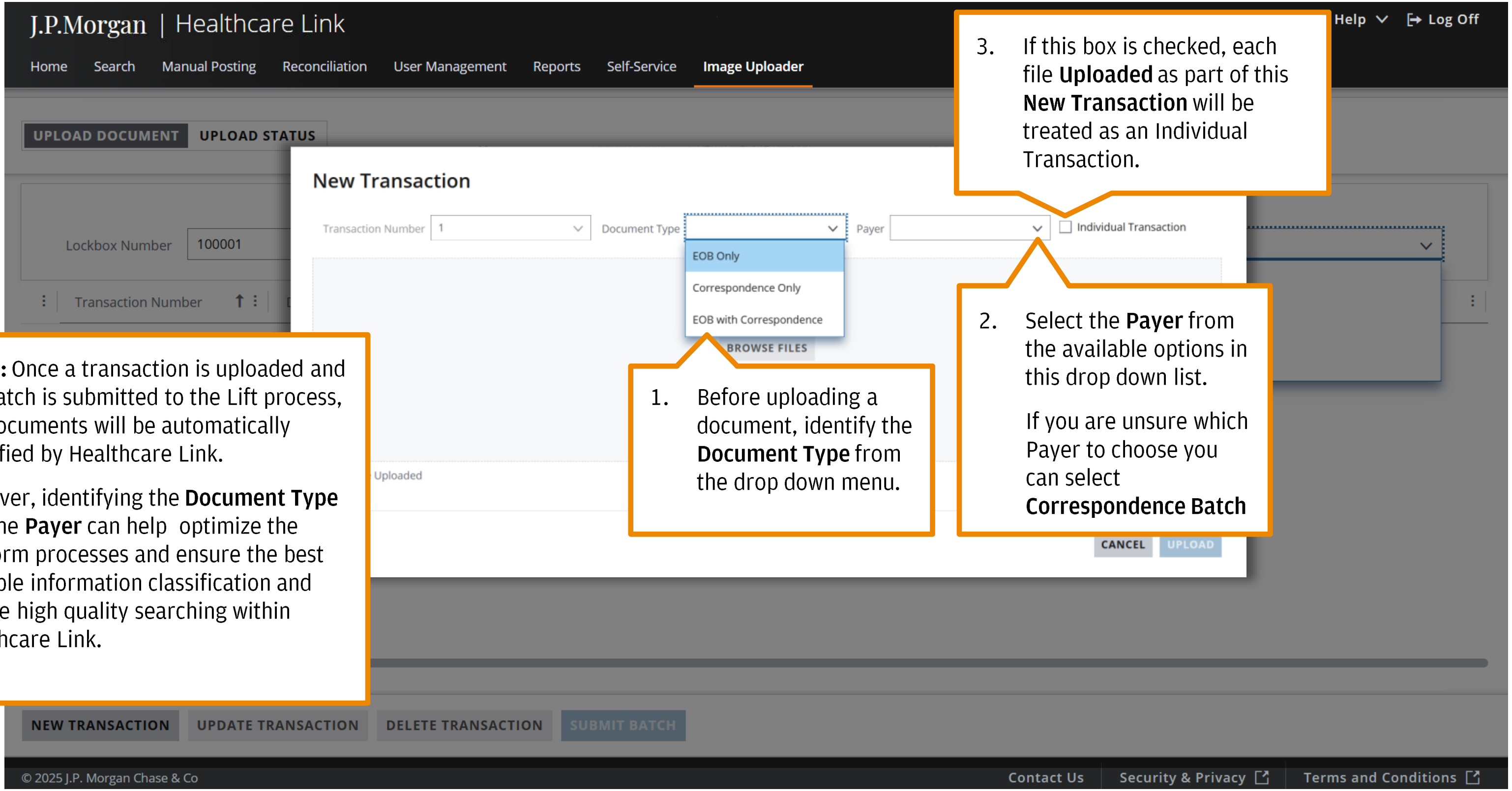

1. Before uploading a document, identify the **Document Type** from the drop down menu.

2. Select the **Payer** from the available options in this drop down list.

   If you are unsure which Payer to choose you can select **Correspondence Batch**

3. If this box is checked, each file **Uploaded** as part of this **New Transaction** will be treated as an Individual Transaction.

NOTE: Once a transaction is uploaded and the batch is submitted to the Lift process, the documents will be automatically classified by Healthcare Link.

However, identifying the **Document Type** and the **Payer** can help optimize the platform processes and ensure the best possible information classification and enable high quality searching within Healthcare Link.

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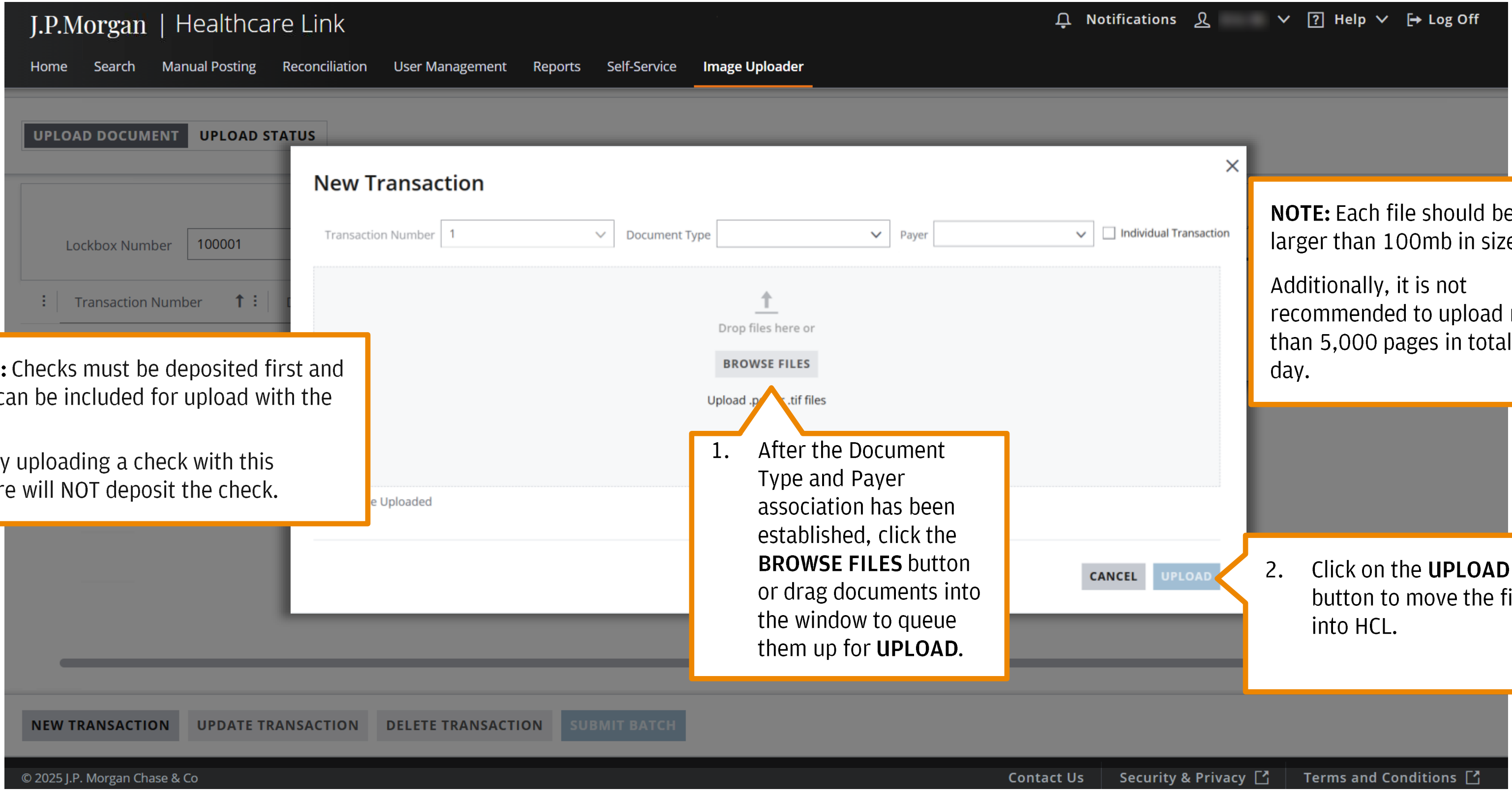

NOTE: Checks must be deposited first and then can be included for upload with the EOB.

Simply uploading a check with this feature will NOT deposit the check.

1. After the Document Type and Payer association has been established, click the **BROWSE FILES** button or drag documents into the window to queue them up for **UPLOAD.**

2. Click on the **UPLOAD** button to move the files into HCL.

NOTE: Each file should be no larger than 100mb in size.

Additionally, it is not recommended to upload more than 5,000 pages in total per day.

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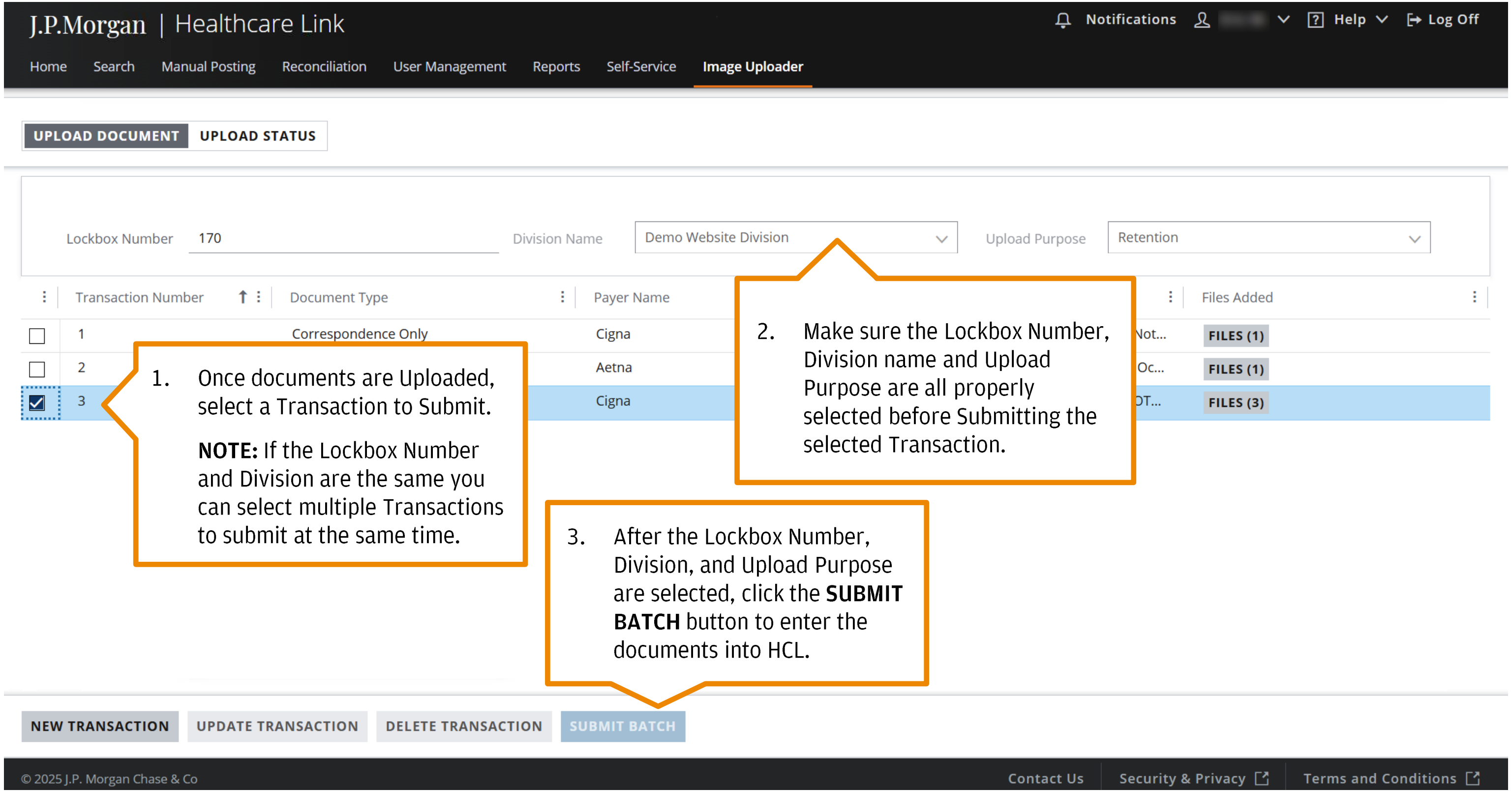

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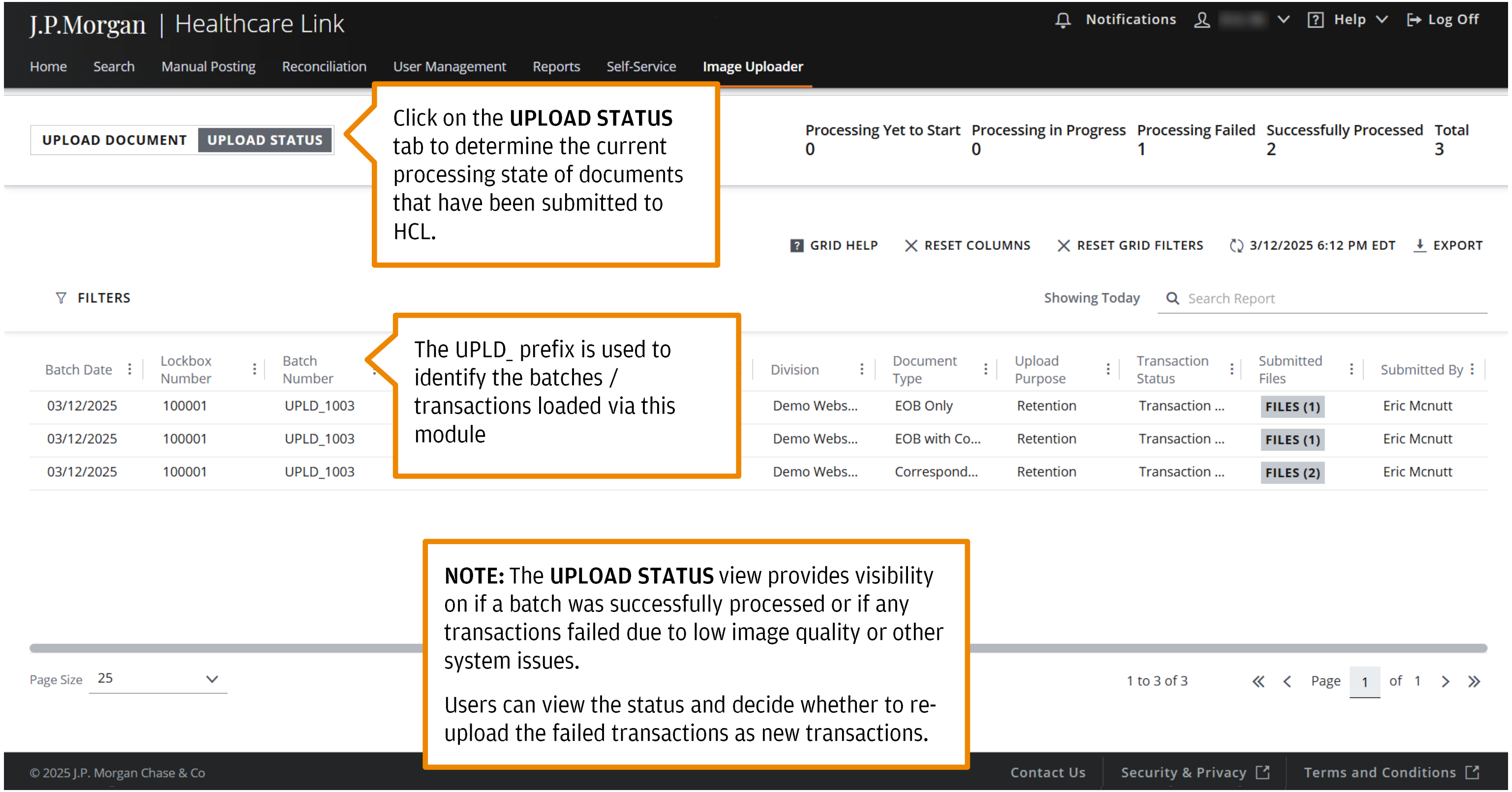

Click on the **UPLOAD STATUS** tab to determine the current processing state of documents that have been submitted to HCL.

The UPLD_ prefix is used to identify the batches / transactions loaded via this module

NOTE: The **UPLOAD STATUS** view provides visibility on if a batch was successfully processed or if any transactions failed due to low image quality or other system issues.

Users can view the status and decide whether to re-upload the failed transactions as new transactions.

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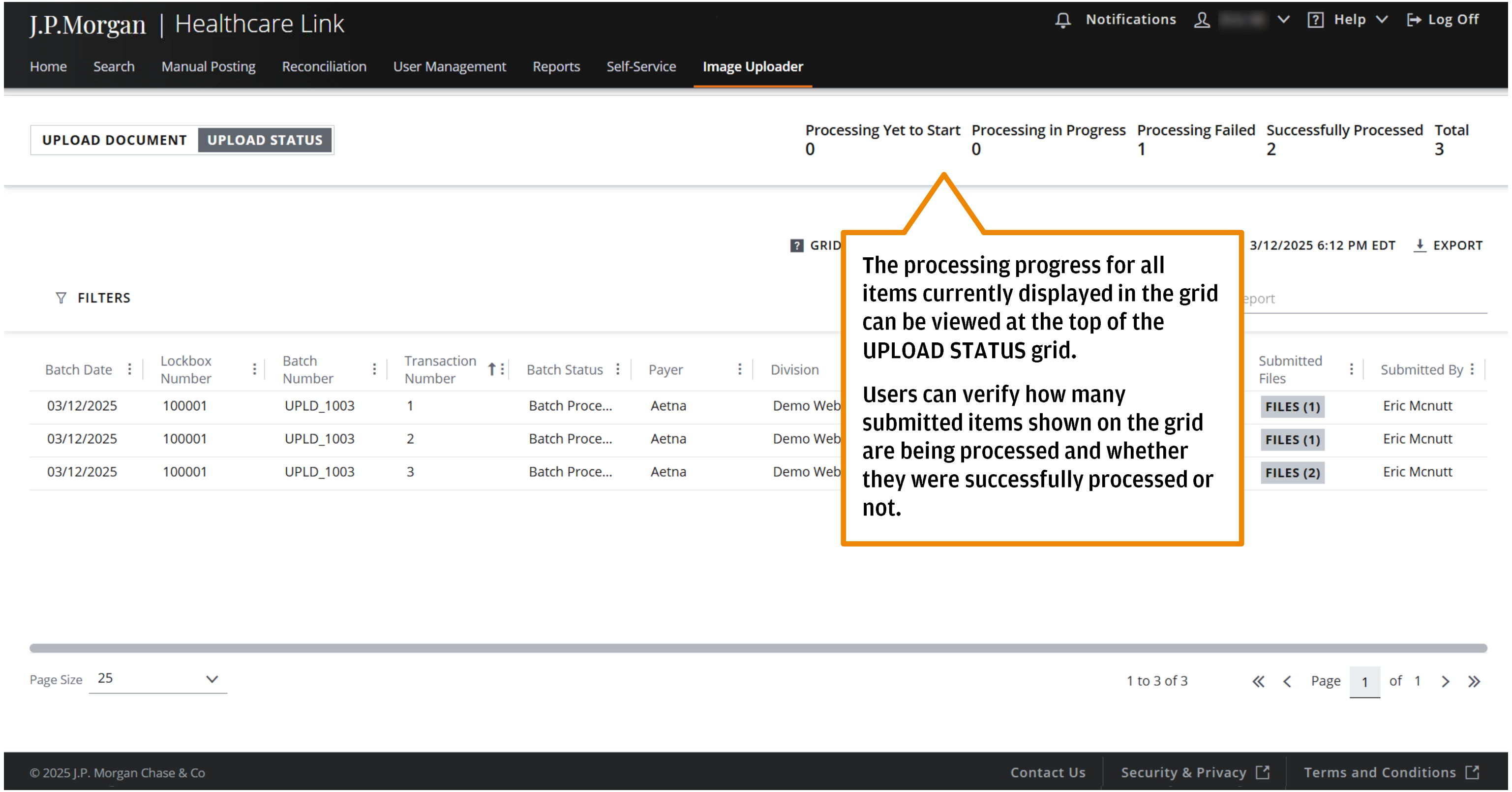

The processing progress for all items currently displayed in the grid can be viewed at the top of the UPLOAD STATUS grid.

Users can verify how many submitted items shown on the grid are being processed and whether they were successfully processed or not.

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FAQs

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How do I log in to Healthcare Link?

Log in to J.P. Morgan Access® via this URL, https://access.jpmorgan.com.

What is the retention period for images?

The retention period will not change: Images will be retained for 10 years.

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.

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 do I not see specific screens 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.

FAQs

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 J.P. Morgan?
The Inbound Files (the files clients send to J.P. Morgan) 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. J.P. Morgan 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

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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
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

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Term/Acronym	Description
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

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Term/Acronym	Description
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 *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 representatives 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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