



# Client Portal – New User Setup



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The following pages describe the steps to provide a new user access to the Client Portal.

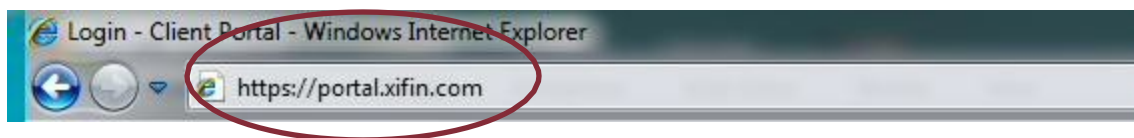
- A new user is defined by their email
- As administrator, you will need to define the rights of the new user defined by their user type (employee or client) and role
- If the “Force User to Change Password Upon Next Login” option is selected the user will have to change their password the first time they login.

\*\* Please reference the Help for additional information.

# Client Portal Log-In and New User Set-Up Instructions

Your facility's portal administrator will be set-up with administrative access to create new users, update passwords and grant access rights to staff and client portal users. Once set-up, he or she will follow the steps below to create other users.

**Step 1:** Access the XIFIN iNet Client Portal via the following URL:



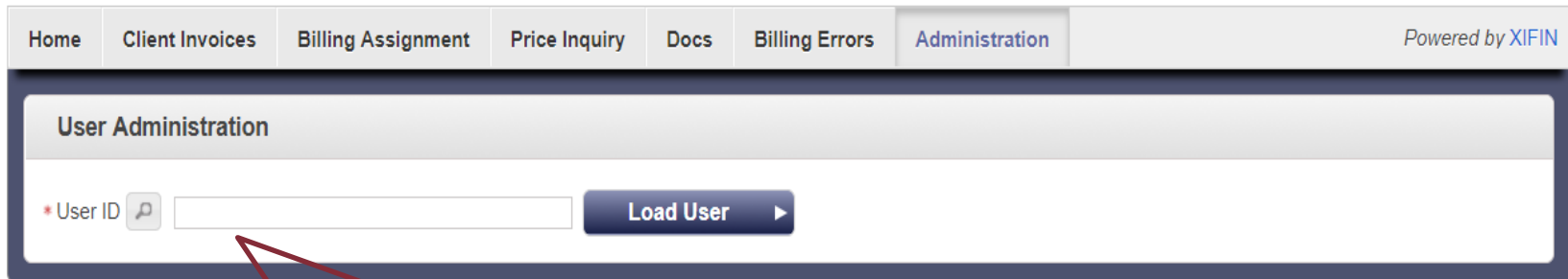
**Step 2:** Log into the XIFIN iNet Client Portal:

A screenshot of the "Client Portal Login" form. The form has a title "Client Portal Login" and two input fields: "User" and "Password". The "User" field contains the email address "dland@customername.com". The "Password" field is filled with ten black dots. Below the fields is a blue "Login" button.

The username must be in an email **format**. It does not need to be an active email account—it just needs to look the part.

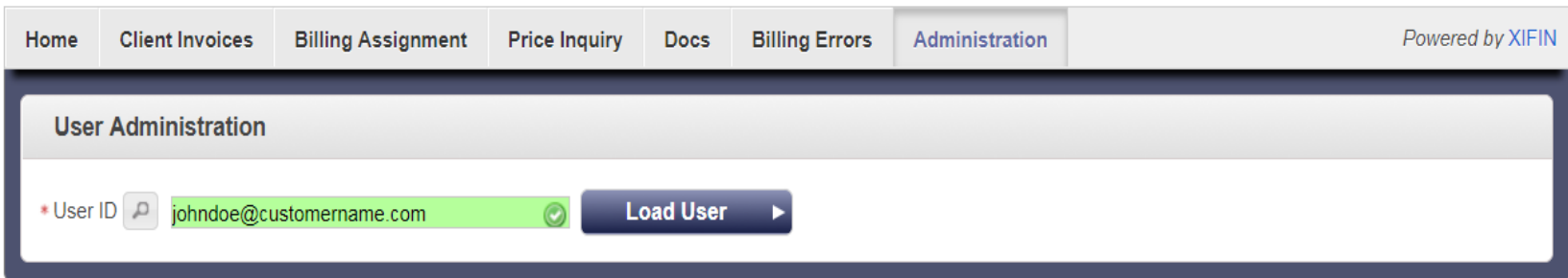
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**Step 3:** Enter the email address of the new user:



The screenshot shows the 'Administration' tab selected in the top navigation bar. Below it, the 'User Administration' section is visible. It contains a 'User ID' field with a search icon and a 'Load User' button. A red arrow points from the empty field to the instruction box below.

Portal administrator will create the new user name in an email *format*.



The screenshot shows the 'Administration' tab selected. In the 'User Administration' section, the 'User ID' field now contains the email address 'johndoe@customername.com', which is highlighted in green and has a green checkmark icon to its right. The 'Load User' button is still present.

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## Step 4: Enter the appropriate user access rights:

A legitimate email account is needed for the purpose of sending client statement notifications, billing error notifications, and/or pending billing assignment notifications.

The screenshot displays the 'User Administration' page in the XIFIN system. The page is divided into several sections:

- User Account:** Includes fields for User ID (johndoe@customername.com), User Type (Employee or Client), First Name, Last Name, E-mail, and Account Expires (MM/dd/yyyy). There is a 'De-activate User Account' checkbox.
- Password:** Features a 'Change Password Now' checkbox, a 'Last Change Date' field, and a note: 'A valid password must be alphanumeric, contain at least one letter and one number and may contain special characters (min 8 characters in length)'. It includes fields for 'New Password' and 'Confirm Password', and a 'Force User to Change Password Upon Next Login' checkbox.
- Access:** Contains a 'Client Access' section with a table for 'Current Client Access' (Client ID, Client Name, Statements Notifications, Billing Assignment Notifications, Billing Error Notifications) and a 'Screen Access' table.

The 'Screen Access' table is as follows:

Screen Name	No Access	Read Only	Update
Billing Assignment	<input checked="" type="radio"/> none	<input type="radio"/> read	<input type="radio"/> update
Client Invoices	<input checked="" type="radio"/> none	<input type="radio"/> read	<input type="radio"/> update
Client Preferences	<input checked="" type="radio"/> none	<input type="radio"/> read	<input type="radio"/> update
Price Inquiry	<input checked="" type="radio"/> none	<input type="radio"/> read	<input type="radio"/> update
Docs	<input checked="" type="radio"/> none	<input type="radio"/> read	<input type="radio"/> update
Billing Errors	<input checked="" type="radio"/> none	<input type="radio"/> read	<input type="radio"/> update
Reset A User's Password	<input checked="" type="radio"/> none	<input type="radio"/> read	<input type="radio"/> update
User Administration	<input checked="" type="radio"/> none	<input type="radio"/> read	<input type="radio"/> update

Portal Administrator will first select if the new user is an employee of the lab or an external client user of the portal.

Employee portal users will have access to all client accounts. Client users must be assigned to their specific client account number(s).

Portal Administrator will provide a temporary password here, and force user to change password upon initial (or next) login.

Role specific access is granted in this grid. As Portal Administrator, you can choose to provide full user administration rights and reset password rights to both employee and client users to allow them to create and update users for the client accounts they have access to.