Client Portal – New User Setup

Client Portal – New User Setup

The following pages describe the steps to provide a new user access to the Client Portal.
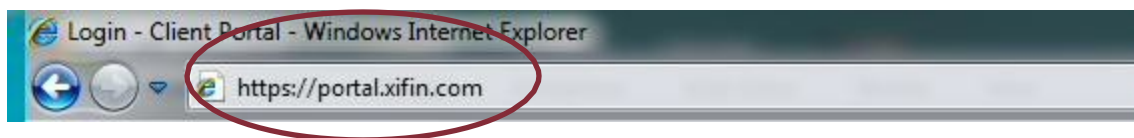
- A new user is defined by their email
- As administrator, you will need to define the rights of the new user defined by their user type (employee or client) and role
- If the "Force User to Change Password Upon Next Login" option is selected the user will have to change their password the first time 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.

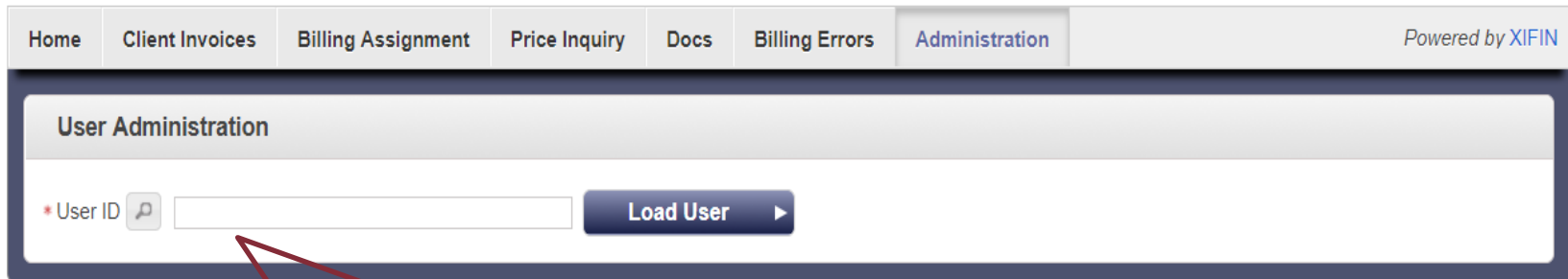**Step 1:** Access the XIFIN iNet Client Portal via the following URL:

Step 2: Log into the XIFIN iNet Client Portal:

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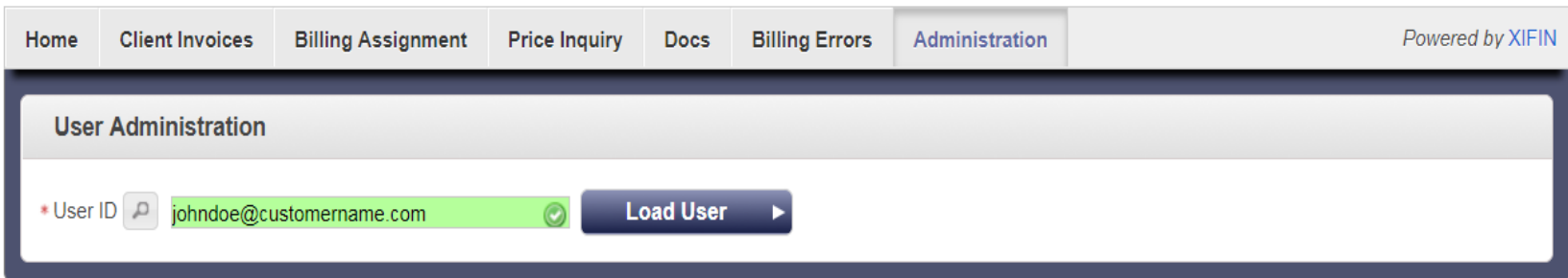
Client Portal Log-In and New User Set-Up Instructions

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

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

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

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.

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.