

Xifin Client Portal

User's Guide

Version 1.0

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Getting Started

Xifin Client Portal is a web-based application that allows you to log in and print your facilities invoices.

Contacting Allina Health Laboratory Billing

| | |
|-----------|---------------------------------------------------------------------------------------------|
| Telephone | (612) 863-0400 |
| Fax | (612) 863-0460 |
| Email | labbilling@allina.com |
| Mail | Allina Health Laboratory Billing Mail Route 20201 PO Box 342 Minneapolis, MN 55440 |

Xifin Client Portal Information

You can find Xifin Client Portal information on the Allina Health Laboratory Billing website (http://ww5.allinahealth.org/ahs/allinalabs.nsf/page/BILLING_HOME). This page contains the following information:

- This guide, which contains all the information that you need to use the Xifin Client Portal
- A link to the application

Information can also be accessed from within the Xifin Client Portal application by clicking **Help** on the upper right corner of the web page.

Logging in to Xifin Client Portal

To get started using the Xifin application, you must log in. The first time you log in to the application, you must change your password. The following topics describe how to perform these tasks as well as what to do if you have forgotten your password, and how to log out of the application.

To log in to the Xifin application, follow these steps:

1. Using your web browser, enter the following URL to get to the Xifin login window, or access from Allina Health Laboratory Billing website or from a desktop shortcut ([see page 13](#)).

<https://portal.xifin.com/clientportal/login.html>



XIFIN iNet Client Portal

Username

Password

[Having trouble with your Username or Password?](#)

Login

2. Enter your username and password in the designated fields.
Note: Passwords are case sensitive.
3. When logging in to the Xifin application for the first time, you must change your password. To change your password, follow these steps:
 - a. Enter your temporary password in the **Old Password** text box.
 - b. Enter your new password in the **New Password** text box.
Note: Your password must be between 8 and 40 characters with at least one letter and one number.
 - c. Enter the same new password in the **Confirm Password** text box and click **Submit**.



[Test Test](#) [Logout](#) [Help](#) [Video Help](#)

Home Client Invoices Administration Powered by XIFIN

Change My Password

A valid password must be alphanumeric, contain at least one letter and one number and may contain special characters (min 8 characters in length).

Old Password

New Password

Confirm Password

Clear Submit

Logging in to Xifin Client Portal If You Forgot Your User Name or Password

If you do not remember your password, you can request to have your password reset through an automated process.

1. Click the **Having trouble with your Username or Password?** link.
2. The **Password Recovery Help** page displays.
3. Enter your **Username** (in the form of an email address).
4. Click **Submit**
5. Click **Cancel** to discard any changes made and return to the previous page, without making any changes.



Password Recovery Help

Please enter the Username associated with your account.
Information to reset your XIFIN iNet Client Portal Password will be sent to the email address associated with your account.
Please contact your system administrator if you need assistance with your Username.

* Username:

An email is sent to your email account, as defined in your user profile, with a link to recover your Client Portal account password. After clicking on the link, from the email, the **Enter New Password** page displays.

1. Enter a **New Password** that you have not previously used.
2. Reenter the same password in **Confirm Password** to ensure you entered the password as you intended.
3. If the two passwords do not match, you will have the opportunity to reenter the **New Password**.
4. After the system updates the password, you will be redirected to the **Portal Login** page.

If you have issues with resetting your password, call client services in Lab Billing Client Services at (612)863-0400 or email us at LabBilling@allina.com.

Logging out of Xifin Client Portal

To log out of the Xifin application, click **Logout** on the menu bar.



Test, Test **Logout** Help Video Help

Home Client Invoices Administration Powered by XIFIN

XIFIN iNet Client Portal Home

Last Login: 07/14/2016 07:52:35 PDT

Messages (0)

| Priority | Subject | From | Received | Note |
|-------------|---------|------|----------|------|
| No results. | | | | |

Changing Your Password

Your Xifin passwords must be changed every 90 days. To change your password, follow these steps:

1. On the Navigation Bar, click **Administration** and **Change My Password**.

Allina Health

Test Test Logout Help Video Help

Home Client Invoices Administration Powered by XIFIN

Change My Password

XIFIN iNet Client Portal Home

Last Login: 07/25/2016 06:28:29 PDT

Messages (0)

| Priority | Subject | From | Received | Note |
|-------------|---------|------|----------|------|
| No results. | | | | |

2. In the **Change My Password** dialog box, enter your current password in the **Old Password** text box.

Allina Health

Test Test Logout Help Video Help

Home Client Invoices Administration Powered by XIFIN

Change My Password

A valid password must be alphanumeric, contain at least one letter and one number and may contain special characters (min 8 characters in length).

Old Password

New Password

Confirm Password

Clear Submit

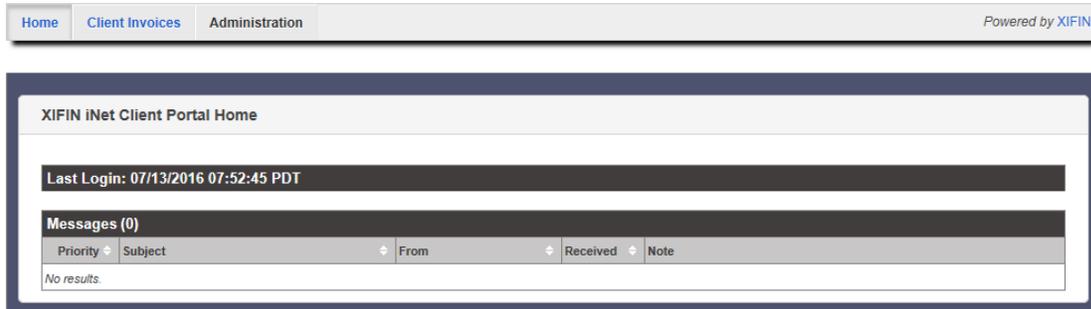
3. Enter a new password in the **New Password** text box.

Note: Your password must be between 8 and 40 characters with at least one letter and one number.

4. Enter the same new password in the **Confirm Password** text box.
5. Click **Submit**.

Using Xifin Client Portal

To view your account summary and invoices, click on the **Client Invoices** tab from the home page.



A summary of your account will be displayed showing your aging balance by month. If you have access to more than one account, each account will appear on a separate line.

| Available Client Aging Balances | | | | | | | | |
|---------------------------------|-----------------------|-------------------------|---------|---------|---------|---------|---------|-----------|
| | Client ID | Client Name | Balance | Current | 30 Days | 60 Days | 90 Days | 120+ Days |
| 1 | TEST | INVOICE TESTING ACCOUNT | 157.20 | 11.90 | 145.30 | 0.00 | 0.00 | 0.00 |
| 2 | TEST2 | INVOICE TEST ACCT | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

View 1 - 2 of 2

The Client Aging Balances grid displays the current client balance and amount owing from 30 to 120+ days. The following columns are available in this grid:

- **Client ID** — The Client ID distinctly identifies a client. Each client has a unique identification, which appears on your client requisition. Click the hyperlink to view the Client ID, Client Name, Preview Invoice hyperlink, Invoice Date Range From/Through fields, and the Previous Invoices grid.
- **Client Name** — The name of the client associated with the Client ID.
- **Balance** — The total balance owed
- **Current** — The amount owing for the current month
- **30 Days** — The amount owing for 30-59 days
- **60 Days** — The amount owing for 60-89 days
- **90 Days** — The amount owing for 90-119 days
- **120+ Days** — The amount owing for 120 days and greater

To view the invoices for a particular account, click on the hotlink for that location under the **Client ID** column.

Home **Client Invoices** Administration Powered by XIFIN

Client Invoices

Available Client Aging Balances

| | Client ID | Client Name | Balance | Current | 30 Days | 60 Days | 90 Days | 120+ Days |
|---|-----------|-------------------------|---------|---------|---------|---------|---------|-----------|
| 1 | TEST | INVOICE TESTING ACCOUNT | 157.20 | 11.90 | 145.30 | 0.00 | 0.00 | 0.00 |
| 2 | TEST2 | INVOICE TEST ACCT | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

View 1 - 2 of 2

Client ID: TEST - INVOICE TESTING ACCOUNT

Preview Current Invoice:

Invoice Date Range: From Through

Click a row to see payment detail for a particular invoice.

Previous Invoices (4)

| Invoice Date | Original Balance | Balance Due | View Invoice | Reconciliation | Retroactive |
|--------------|------------------|-------------|--------------|----------------|-------------|
| 06/30/2016 | 145.30 | 145.30 | | | |
| 06/15/2016 | 0.00 | 0.00 | | | |
| 05/31/2016 | 0.00 | 0.00 | | | |
| 05/15/2016 | 0.00 | 0.00 | | | |

Note: If you only have access to one account, the client aging balance summary and list of invoices will display when you select **Client Invoices**.

Home **Client Invoices** Administration Powered by XIFIN

Client Invoices

Available Client Aging Balances

| | Client ID | Client Name | Balance | Current | 30 Days | 60 Days | 90 Days | 120+ Days |
|---|-----------|-------------------------|---------|---------|---------|---------|---------|-----------|
| 1 | TEST | INVOICE TESTING ACCOUNT | 157.20 | 11.90 | 145.30 | 0.00 | 0.00 | 0.00 |

View 1 - 1 of 1

Client ID: TEST - INVOICE TESTING ACCOUNT

Preview Current Invoice:

Invoice Date Range: From Through

Click a row to see payment detail for a particular invoice.

Previous Invoices (22)

| Invoice Date | Original Balance | Balance Due | View Invoice | Reconciliation | Retroactive |
|--------------|------------------|-------------|--------------|----------------|-------------|
| 06/30/2016 | 145.30 | 145.30 | | | |
| 06/15/2016 | 0.00 | 0.00 | | | |
| 05/31/2016 | 0.00 | 0.00 | | | |
| 05/15/2016 | 0.00 | 0.00 | | | |
| 04/30/2016 | 0.00 | 0.00 | | | |
| 04/15/2016 | 0.00 | 0.00 | | | |
| 03/31/2016 | 0.00 | 0.00 | | | |
| 03/15/2016 | 0.00 | 0.00 | | | |

Note: The "Reconciliation" and "Retroactive" columns are not currently functional.

Viewing Invoices

To view a list of invoices, select the desired **Invoice Date Range** — selecting the **From** and **Through** dates from the calendar grid. The default date range is a one year time period going back from the current date. Click the **Get Data** button to populate the **Previous Invoices** grid with the applicable data for the Invoice Date Range provided.

Note: You will receive an email notification from Xifin when there are new invoices posted to your account.

The screenshot shows the 'Client Invoices' interface. At the top, there are navigation tabs for 'Home', 'Client Invoices', and 'Administration', with 'Client Invoices' selected. The page is powered by XIFIN. Below the navigation is a section titled 'Client Invoices' containing an 'Available Client Aging Balances' table. This table has columns for Client ID, Client Name, Balance, Current, 30 Days, 60 Days, 90 Days, and 120+ Days. The first row shows Client ID 'TEST' and Client Name 'INVOICE TESTING ACCOUNT' with a Balance of 157.20, Current of 11.90, and 30 Days of 145.30. Below this is a section for 'Client ID: TEST - INVOICE TESTING ACCOUNT' with a 'Preview Current Invoice' link. A date range selector is highlighted with a red box, showing 'From 04/13/2016' and 'Through 07/13/2016' with a 'Get Data' button. Below the date range is a note: 'Click a row to see payment detail for a particular invoice.' The 'Previous Invoices (6)' table is shown below, with columns for Invoice Date, Original Balance, Balance Due, View Invoice, Reconciliation, and Retroactive. The table contains six rows of invoice data.

| Invoice Date | Original Balance | Balance Due | View Invoice | Reconciliation | Retroactive |
|--------------|------------------|-------------|--------------|----------------|-------------|
| 06/30/2016 | 145.30 | 145.30 | | | |
| 06/15/2016 | 0.00 | 0.00 | | | |
| 05/31/2016 | 0.00 | 0.00 | | | |
| 05/15/2016 | 0.00 | 0.00 | | | |
| 04/30/2016 | 0.00 | 0.00 | | | |
| 04/15/2016 | 0.00 | 0.00 | | | |

The **Previous Invoices** grid displays client invoices between the Invoice **From** and **Through** dates.

The following columns are available in this grid:

- **Invoice Date** - The date the invoice was generated.
- **Original Balance** - The original balance on the invoice.
- **Balance Due** - The balance due on the invoice.
- **View Invoice** - Click the icon to view a PDF of the invoice. The pdf of the selected invoice will open in a separate window and can be viewed or printed.

Click a row to see payment detail for a particular invoice. The **Payment Detail Invoice** grid appears.

Home Client Invoices Administration Powered by XIFIN

Client Invoices

Available Client Aging Balances

| | Client ID | Client Name | Balance | Current | 30 Days | 60 Days | 90 Days | 120+ Days |
|---|-----------|-------------------------|---------|---------|---------|---------|---------|-----------|
| 1 | TEST | INVOICE TESTING ACCOUNT | 157.20 | 11.90 | 145.30 | 0.00 | 0.00 | 0.00 |

View 1 - 1 of 1

Client ID: TEST - INVOICE TESTING ACCOUNT

Preview Current Invoice:

Invoice Date Range: From Through **Get Data**

Click a row to see payment detail for a particular invoice.

Previous Invoices (6)

| Invoice Date | Original Balance | Balance Due | View Invoice | Reconciliation | Retroactive |
|--------------|------------------|-------------|--------------|----------------|-------------|
| 06/30/2016 | 145.30 | 145.30 | | | |
| 06/30/2016 | 0.00 | 0.00 | | | |

Payment Detail for Invoice from 06/30/2016

Payment Details (1)

| Payment Date | Amount | Payment Type | Check # | Card Type | Transaction Type | Transaction ID | Comments |
|--------------|--------|--------------|---------|-----------|------------------|----------------|----------|
| No results. | | | | | | | |

The **Payment Detail Invoice** grid displays the following columns:

- **Payment Date** - Displays the date the payment was processed.
- **Amount** - Displays the amount of the payment.
- **Payment Type** - Displays the type of payment made (i.e., Cash, Check, or Electronic Payment).
- **Check #** - Displays the Check # if the Payment Type was Check.
- **Card Type** - Displays the Card Type if the Payment Type was Electronic Payment.
- **Transaction Type** - Displays the Transaction Type if the Payment Type was Electronic Payment.
- **Transaction ID** - Displays the electronic Transaction ID provided by the payment gateway when the electronic transaction is approved.
- **Comments** - Displays the Comments provided when the payment was processed.

The **Preview Current Invoice** link displays charges from the last invoice to the current date.

Note: This invoice is a snapshot in time. Adjustments can be made throughout the billing cycle, so this may not match your final invoice for this billing period.

Home **Client Invoices** Administration Powered by XIFIN

Client Invoices

Available Client Aging Balances ⌵

| | Client ID | Client Name | Balance | Current | 30 Days | 60 Days | 90 Days | 120+ Days |
|---|-----------|-------------------------|---------|---------|---------|---------|---------|-----------|
| 1 | TEST | INVOICE TESTING ACCOUNT | 157.20 | 11.90 | 145.30 | 0.00 | 0.00 | 0.00 |

View 1 - 1 of 1

Client ID: TEST - INVOICE TESTING ACCOUNT

Preview Current Invoice:

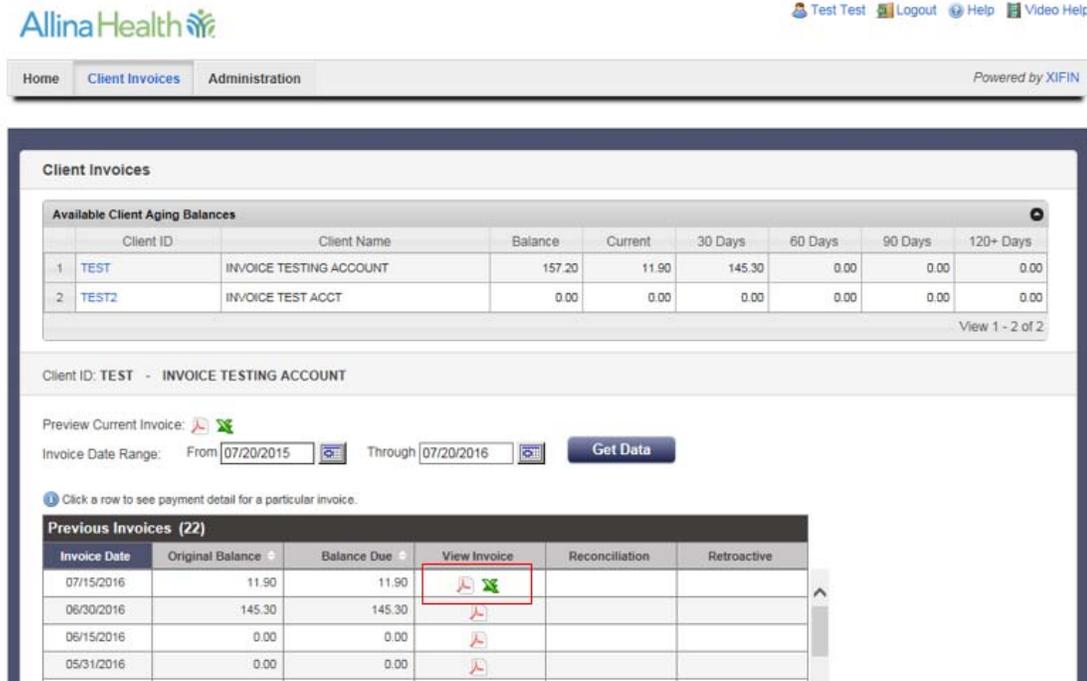
Invoice Date Range: From Through Get Data

Click a row to see payment detail for a particular invoice.

| Previous Invoices (6) | | | | | |
|-----------------------|------------------|-------------|--------------|----------------|-------------|
| Invoice Date | Original Balance | Balance Due | View Invoice | Reconciliation | Retroactive |
| 06/30/2016 | 145.30 | 145.30 | | | |
| 06/15/2016 | 0.00 | 0.00 | | | |
| 05/31/2016 | 0.00 | 0.00 | | | |
| 05/15/2016 | 0.00 | 0.00 | | | |
| 04/30/2016 | 0.00 | 0.00 | | | |
| 04/15/2016 | 0.00 | 0.00 | | | |

Download Invoice to Excel

To download your invoice detail to an Excel spreadsheet, click on the  icon in the **View Invoice** column. Click **Open** to open the file, or **Save** to save the file to your computer.



Client Invoices

Available Client Aging Balances

| | Client ID | Client Name | Balance | Current | 30 Days | 60 Days | 90 Days | 120+ Days |
|---|-----------|-------------------------|---------|---------|---------|---------|---------|-----------|
| 1 | TEST | INVOICE TESTING ACCOUNT | 157.20 | 11.90 | 145.30 | 0.00 | 0.00 | 0.00 |
| 2 | TEST2 | INVOICE TEST ACCT | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

Client ID: TEST - INVOICE TESTING ACCOUNT

Preview Current Invoice:  

Invoice Date Range: From Through

Click a row to see payment detail for a particular invoice.

Previous Invoices (22)

| Invoice Date | Original Balance | Balance Due | View Invoice | Reconciliation | Retroactive |
|--------------|------------------|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|-------------|
| 07/15/2016 | 11.90 | 11.90 |   | | |
| 06/30/2016 | 145.30 | 145.30 |  | | |
| 06/15/2016 | 0.00 | 0.00 |  | | |
| 05/31/2016 | 0.00 | 0.00 |  | | |

When you open the file, your invoice detail will appear just as it does in the pdf version. There will be a line item for each invoices prior balance, any adjustments made and any new charges for the invoice period selected.

| Ordering Client | Date | Control No. | Specimen No. | Claim Note | EPI | Patient Name | Test ID | CPT Code | Description | Charges |
|------------------------------------------------|-------------------------|-------------|--------------|--------------------------------|-----|-----------------|----------------------|----------|-----------------------------|---------------|
| Warning - This report may contain PHI | | | | | | | | | | |
| Invoice Accurate as of 2016-07-20 12:11 AM PST | | | | | | | | | | |
| TEST | INVOICE TESTING ACCOUNT | | | | | | Invoice: TEST 071516 | | | |
| TEST | 03/01/2015 | XA246642 | | Repricing - Inv 03/30/2015 | | SERVICES, XIFIN | 308004800 | | BASIC METABOLIC PANEL | -6.30 |
| TEST | 03/02/2015 | XA123321 | | Repricing - Inv 03/30/2015 | | TEST, CLIENT | 308237800 82378 | | CEA | -25.30 |
| TEST | 03/02/2015 | XA123321 | | Repricing - Inv 03/30/2015 | | TEST, CLIENT | 308502500 | | CBC WITH DIFF | -6.30 |
| TEST | 03/30/2015 | | | Prior Balance - Inv 03/30/2015 | | | | | | 33.10 |
| TEST | 01/01/2016 | XPORTAL | | Repricing - Inv 02/23/2016 | | PORTAL, TEST | 308413200 84132 | | POTASSIUM | -8.00 |
| TEST | 01/15/2016 | XPORTAL3 | | Repricing - Inv 02/23/2016 | | CHECK, CHARGE | 303641500 36415 | | VENIPUNCTURE | -3.70 |
| TEST | 01/15/2016 | XPORTAL3 | | Repricing - Inv 02/23/2016 | | CHECK, CHARGE | 308351900 83519 | | ACETYLCHOLINE RECEPTOR BIND | -42.70 |
| TEST | 02/01/2016 | XPORTAL2 | | Repricing - Inv 02/23/2016 | | VACATION, SODN | 308502500 | | CBC WITH DIFF | -6.30 |
| TEST | 02/23/2016 | | | Prior Balance - Inv 02/23/2016 | | | | | | 60.70 |
| TEST | 06/30/2016 | | | Prior Balance - Inv 06/30/2016 | | | | | | 145.30 |
| TEST | 07/01/2016 | XRQG5584 | | | | TESTING, PORTAL | 308006100 | | LIPID PANEL | 11.90 |
| TEST | 07/01/2016 | XRQG5584 | | | | TESTING, PORTAL | 308006100 82465 | | CHOLESTEROL TOTAL | |
| TEST | 07/01/2016 | XRQG5584 | | | | TESTING, PORTAL | 308006100 83718 | | HDL CHOLESTEROL | |
| TEST | 07/01/2016 | XRQG5584 | | | | TESTING, PORTAL | 308006100 84478 | | TRIGLYCERIDES | |
| Subtotal: | | | | | | | | | TEST | 157.20 |
| Current Total: | | | | | | | | | | 157.20 |

Reading invoices for Miscellaneous Sendout (MSO) billing:

In the example below, the test code of 19191919 is an MSO test that is not built for billing, so the CPT code is embedded in the test name. Whenever possible, the test name is the test name of how the testing was ordered. In this example the patient had two MSO tests and one orderable Antithrombin III Activity.

| | | | | | | |
|------------|---------------------------------|-------------|-----------|-------|------------------------------|-------|
| 12/01/2017 | MSO, EXAMPLE DOB: 04/25/1972 | XMSOTESTING | 19191919 | 00000 | 85301 ANTITHROMBIN ANTIGEN | 1.00 |
| | | | 19191919 | 00000 | 85366 SOLUBLE FIBRIN MONOMER | 1.00 |
| | | | 308530000 | 85300 | ANTITHROMBIN III ACTIVITY | 19.70 |

Tips and Best Practices

The following topics provide tips for using the Xifin application.

- Adding a desktop shortcut to Allina Health Laboratory
- Adding a desktop shortcut to the Xifin application
- Adding Allina Health Laboratory and the Xifin Application as trusted websites

Adding a Desktop Shortcut to Allina Health Laboratory

For quick access to the Allina Health Laboratory website, you can add a shortcut to your computer desktop. To add a shortcut, follow these steps:

Note: These instructions are for Microsoft Windows 7 and Internet Explorer 11. The steps for other versions of Windows or Internet Explorer might be different.

1. Open Internet Explorer and enter the following uniform resource locator (URL) in the address bar:

<http://www.allinahealth.org/laboratory>

2. On the **File** menu, click **Send > Shortcut to Desktop**.

A shortcut to Allina Health Laboratory is added to your computer desktop.

Adding a Desktop Shortcut to the Xifin Application

To add a shortcut to the Xifin application, follow these steps:

Note: These instructions are for Microsoft Windows 7 and Internet Explorer 11. The steps for other versions of Windows or of Internet Explorer, or for other operating systems might be different.

1. Open Internet Explorer and enter following URLs in the address bar:

<https://portal.xifin.com/clientportal/login.html>

2. On the **File** menu, click **Send > Shortcut to Desktop**.

A shortcut to the Xifin application is added to your computer desktop.

Adding Allina Health Laboratory and the Xifin Application as Trusted Websites

To ensure correct operation, add Allina Health Laboratory and the Xifin application to your Internet Explorer as trusted sites by following these steps:

Note: These instructions are for Internet Explorer 11. The steps for other versions of Internet Explorer might be different.

1. Open Internet Explorer.
2. On the **Tools** menu, click **Internet options**.
3. In the Internet Options dialog box, click the **Security** tab.
4. On the Security page, click the **Trusted sites** icon.
5. Click **Sites**.
6. In the Trusted sites dialog box, enter each of the following URLs, and then click **Add** to add the website to the list of trusted sites:

Allina Health Laboratory <http://www.allinahealth.org/laboratory>

Xifin site <https://portal.xifin.com/clientportal/login.html>

7. Clear the Require server verification (https:) for all sites in this zone check box.
8. Click **Close** to close the Trusted sites dialog box.
9. Click **OK** to close the Internet Options dialog box.

Disable Popup Blockers for the Website

If the Xifin application does not open correctly, it might be necessary to disable popup blockers on your computer. To disable popup blockers, follow these steps:

Note: These instructions are for Internet Explorer 11. The steps for other versions of Internet Explorer might be different.

1. Open Internet Explorer.
2. On the **Tools** menu, click **Internet options**.
3. In the Internet Options dialog box, click the **Privacy** tab.
4. On the Privacy page, click **Settings**.
5. In the Pop-up Blocker Settings dialog box, enter each of the following URLs, <https://portal.xifin.com/clientportal/login.html>, and then click **Add** to add the website to the list of allowed websites:
6. Click **Close** to close the Pop-up Blocker Settings dialog box.
7. Click **OK** to close the Internet Options dialog box.

Frequently Asked Questions

The following topics contain answers to frequently asked questions (FAQ) about the Xifin application.

User Setup, Account Number, and Login

Q: Who can set up new Xifin Client Portal accounts and Users?

A: Upon receipt of a completed user request form, Allina Health Laboratory Billing staff will set up new Xifin Client Portal accounts. Contact your Account Representative for the form.

Q: My facility has multiple accounts. Do I need to remember each of the account numbers when I log in to the Xifin application?

A: No. Your Xifin user ID is set up with access to specific accounts. For a single-site location setup, when you log in, you will see invoices for your account. For a multiple-site location setup, when you log in, you will select from the list of accounts that you want to access.

Q: I work in a facility with multiple accounts. How do I switch between accounts?

A: On the **Client Invoices** page, select the account that you want from the **Client Aging Balances** section.

Q: Must I log out to switch to a different account?

A: No. You can select a different account by clicking on another **Client ID** in the **Client Aging Balances** section.

Q: How long will the Xifin application remain open with no activity?

A: For security reasons, users are logged out of the Xifin application after 30 minutes of inactivity.

Passwords

Q: Who can reset my password?

A: Users are able to reset their own passwords ([see page 6](#)).

Q: How often do I need to change my password?

A: Passwords must be changed every 90 days. When you log in to the Xifin application with an expired password, you are prompted to change the password.

Q: Can I change my password whenever I choose or do I need to wait for the Xifin application to prompt me to change my password?

A: You can change your passwords whenever you want. To change your password, click **Administration** and **Change My Password** on the main menu.