Allina Health
LABORATORY

Xifin Client Portal

User's Guide

Version 1.0

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Table of Contents

Getting Started 3

Contacting Allina Health Laboratory Billing 3

Xifin Client Portal Information 3

Logging in to Xifin Client Portal 4

Logging in to Xifin Client Portal If You Forgot Your User Name or Password 5

Logging out of Xifin Client Portal 5

Changing Your Password 6

Using Xifin Client Portal 7

Viewing Invoices 9

Download Invoice to Excel 12

Reading invoices for Miscellaneous Sendout (MSO) billing: 13

Tips and Best Practices 14

Adding a Desktop Shortcut to Allina Health Laboratory 14

Adding a Desktop Shortcut to the Xifin Application 14

Adding Allina Health Laboratory and the Xifin Application as 15

Trusted Websites 15

Disable Popup Blockers for the Website 15

Frequently Asked Questions 16

User Setup, Account Number, and Login 16

Passwords 16

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 XIFIN client portal tab of the Lab billing page on the Allina Health Laboratory website. 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.

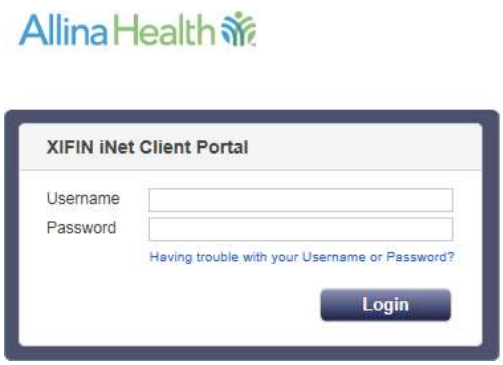
Logging in to Xifin Client Portal

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



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.**

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.

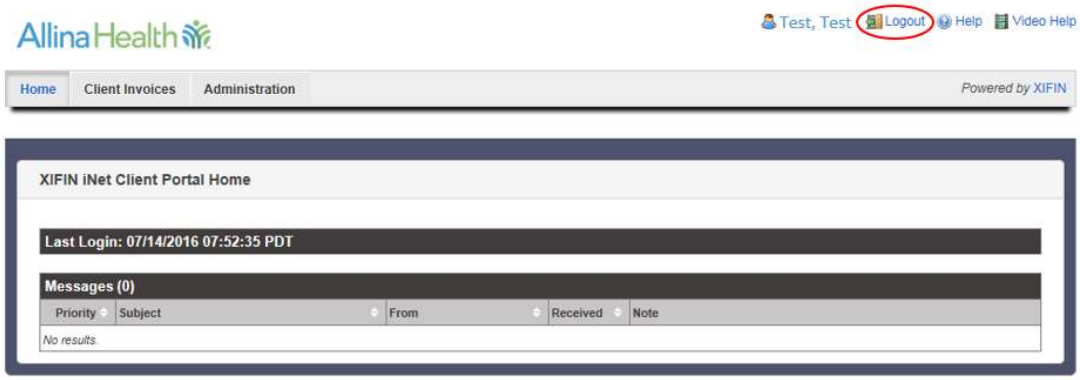
An email is sent to your email account, as defined in your user profile, with a link to recover your Client Portal account password. After clicking on the link, from the email, the **Enter New Password** page displays.

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 reseting 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.



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.**

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

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

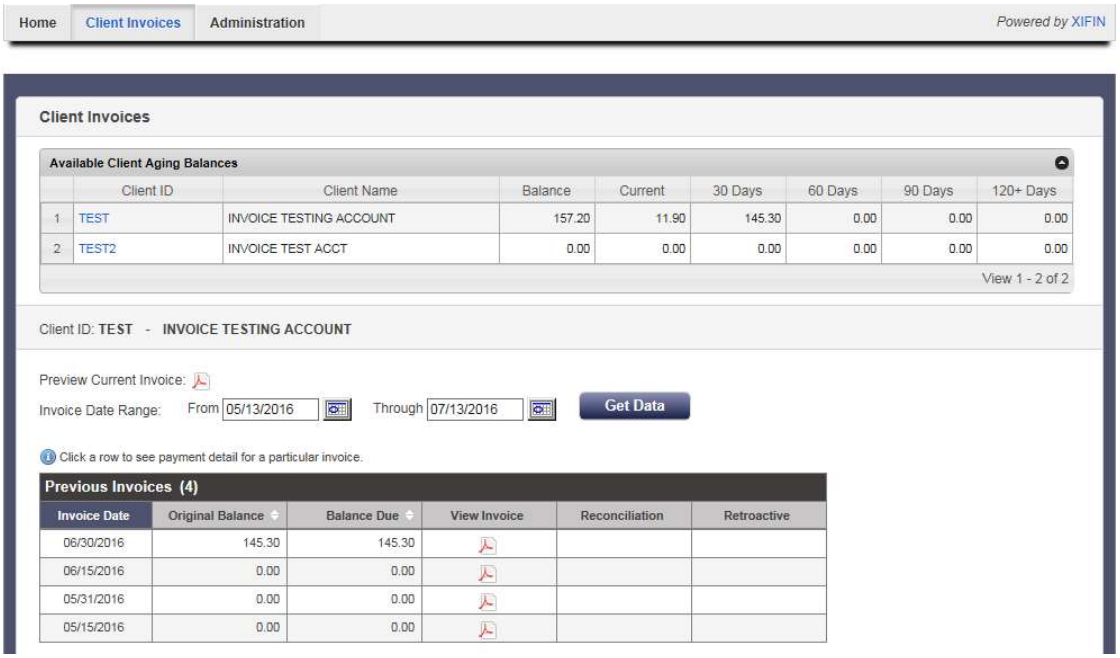
To view your account summary and invoices, click on the **Client Invoices** tab from the home page.

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.

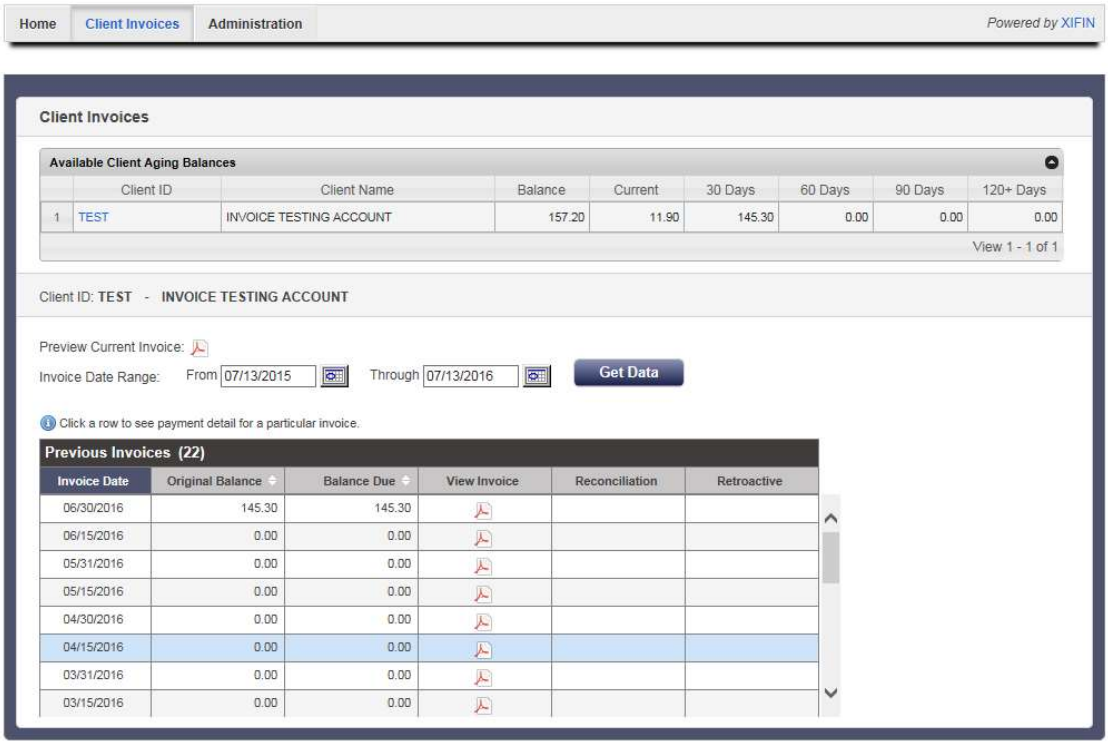
The Client Aging Balances grid displays the current client balance and amount owing from 30 to 120+ days. The following columns are available in this grid:

- **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.



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****.*

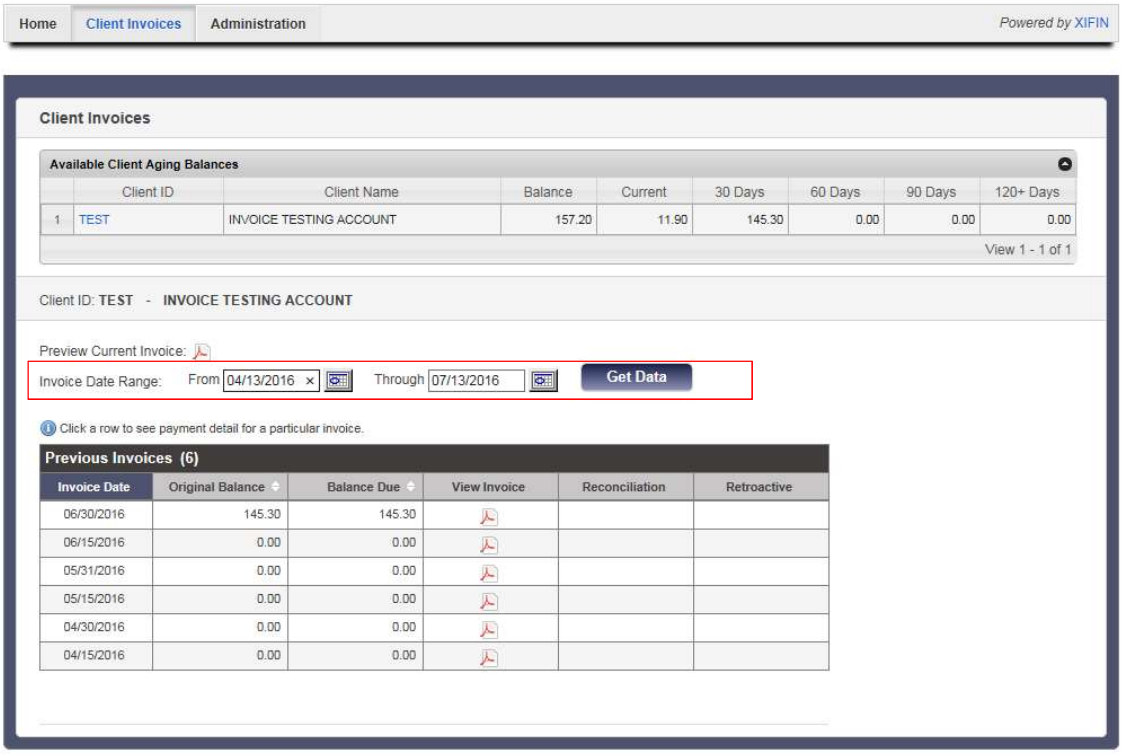


Note: *The "Reconciliation" and "Retroactive" columns are not currently functional.*

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.*

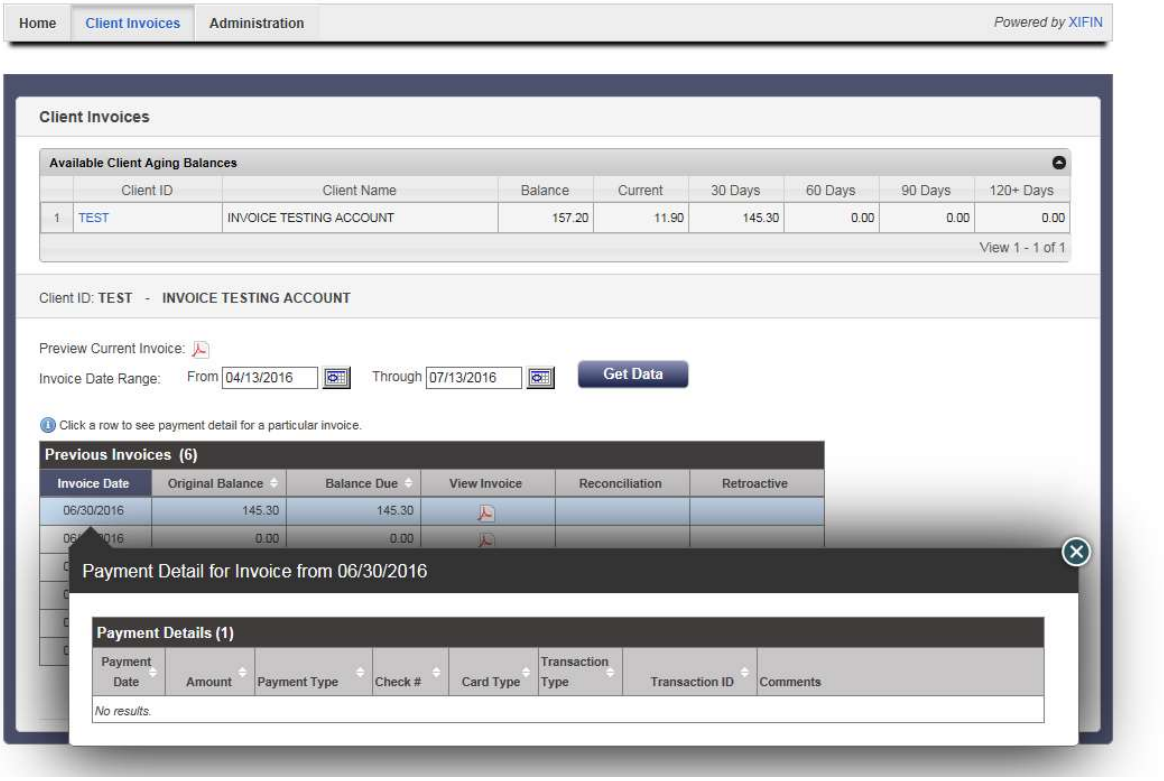


The **Previous Invoices** grid displays client invoices between the Invoice **From** and **Through** dates.

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.

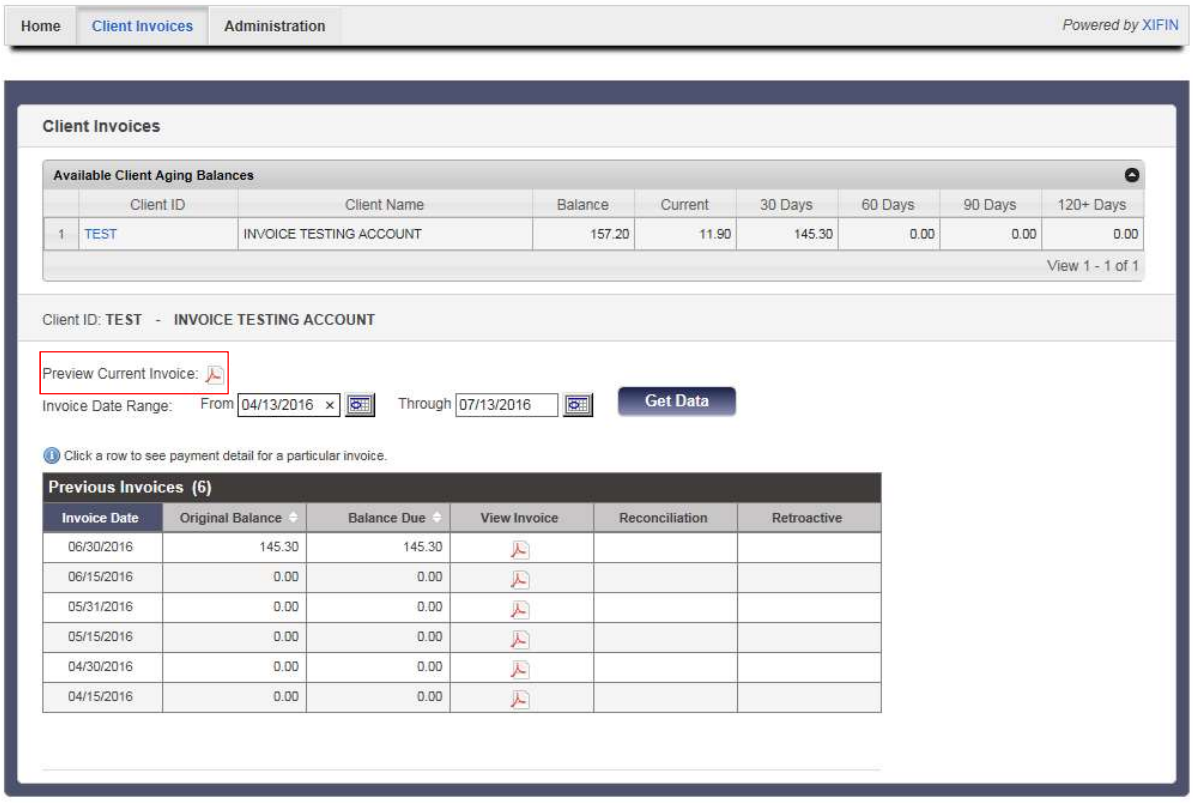


The **Payment Detail Invoice** grid displays the following columns:

- **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.

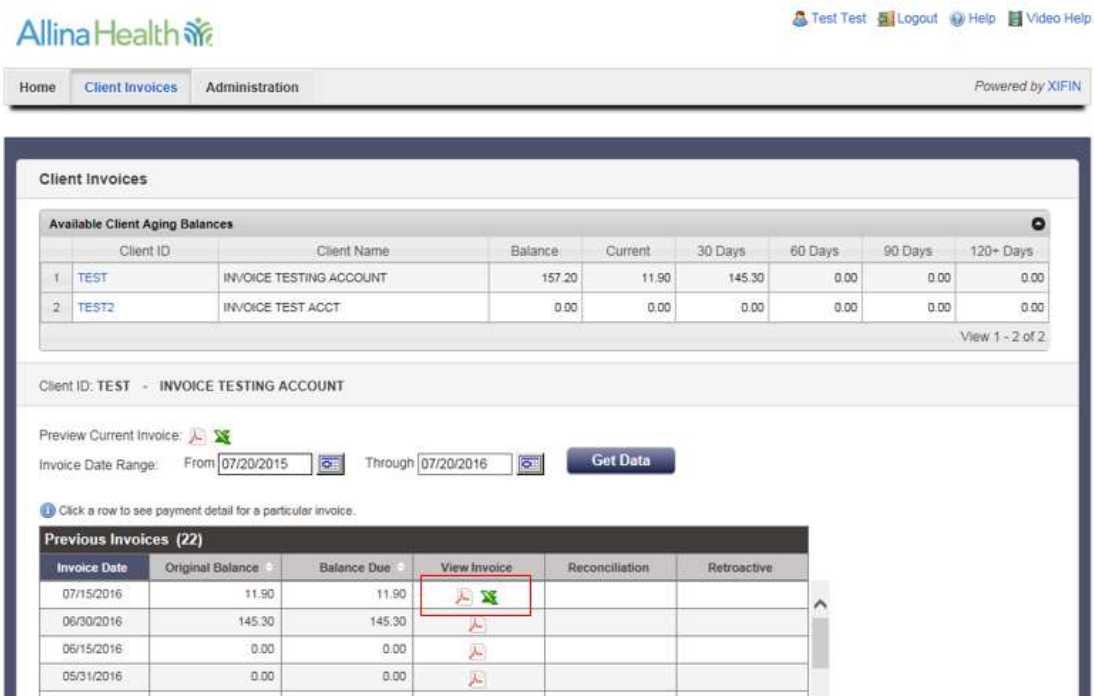
The **Preview Current Invoice** link **displays charges** from the last invoice to the current date.

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.*



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.



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.

	A	B	C	D	E	F	G	H	I	K	M
1	**Warning - This report may contain PHI**										
3	**Invoice Accurate as of 2016-07-20 12:11 AM PST**										
4											
5	**TEST**	**INVOICE TESTING ACCOUNT**								**Invoice: TEST 071516**	
6											
7	**Ordering Client**	**Date**	**Control No.**	**Specimen No.**	**Claim Note**	**EPI**	**Patient Name**	**Test ID**	**CPT Code**	**Description**	**Charges**
8	TEST	03/01/2015	XA246642		Repricing - Inv 03/30/2015		SERVICES, XIFIN	308004800		BASIC METABOLIC PANEL	-6.30
9	TEST	03/02/2015	XA123321		Repricing - Inv 03/30/2015		TEST, CLIENT	308237800	82378	CEA	-25.30
10	TEST	03/02/2015	XA123321		Repricing - Inv 03/30/2015		TEST, CLIENT	308502500		CBC WITH DIFF	-6.30
11	TEST	03/30/2015			Prior Balance - Inv 03/30/2015						39.10
12	TEST	01/01/2016	XPORTAL		Repricing - Inv 02/23/2016		PORTAL, TEST	308413200	84132	POTASSIUM	-8.00
13	TEST	01/15/2016	XPORTAL3		Repricing - Inv 02/23/2016		CHECK, CHARGE	303641500	36415	VENIPUNCTURE	-3.70
14	TEST	01/15/2016	XPORTAL3		Repricing - Inv 02/23/2016		CHECK, CHARGE	308351300	83519	ACETYLCHOLINE RECEP BIND	-42.70
15	TEST	02/01/2016	XPORTAL2		Repricing - Inv 02/23/2016		VACATION, SOON	308502500		CBC WITH DIFF	-6.30
16	TEST	02/23/2016			Prior Balance - Inv 02/23/2016						60.70
17	TEST	06/30/2016			Prior Balance - Inv 06/30/2016						145.30
18	TEST	07/01/2016	XRQQ5584				TESTING, PORTAL	308006100		LIPID PANEL	11.90
19	TEST	07/01/2016	XRQQ5584				TESTING, PORTAL	308006100	82465	CHOLESTEROL TOTAL	
20	TEST	07/01/2016	XRQQ5584				TESTING, PORTAL	308006100	83718	HDL CHOLESTEROL	
21	TEST	07/01/2016	XRQQ5584				TESTING, PORTAL	308006100	84478	TRIGLYCERIDES	
22							**Subtotal:**			**TEST**	**157.20**
23							**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	XMSOTESTING	19191919	00000	85301 ANTITHROMBIN ANTIGEN	1.00
		DOB: 04/25/1972		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/allinhealthlaboratory
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/allinahealthlaboratory
   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 I 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.