Xchange User Guide ✚

AuthentiCare® Learning Management System

Table of Contents

1.0   Introduction

1.1 About Xchange

Welcome to Xchange, a learning management system (LMS), that holds all on-demand AuthentiCare trainings in one user-friendly location. Xchange is an easy-to-use learning tool that allows users to register and complete AuthentiCare training, and if applicable, complete annual training requirements.

1.2 Useful Links

Reference the links below for steps on how to self-register for and login to the Xchange learning management system.

The first step is to self-register to Xchange. Once self-registration is completed and approved, new users can login to Xchange to access online training resources through the *Login* page.

1. Self-Registration – The *self-registration* page link leads to the online self-registration form. All new users need to complete the self-registration process before given access to Xchange. For more information about the self-registration process, refer to Chapter 2.
   Self-Registration Link*: https://fiserv.csod.com/selfreg/register.aspx?c=authenticare*

2. Login Page – The *Login* page link leads to where users can access the system by entering the email and password used in the self-registration process. For more information about logging into Xchange, refer to Chapter 3.1.
   Xchange Login Link*: https://fiserv.csod.com/client/fiserv/default.aspx*

2.0 Getting Started with Self-Registration
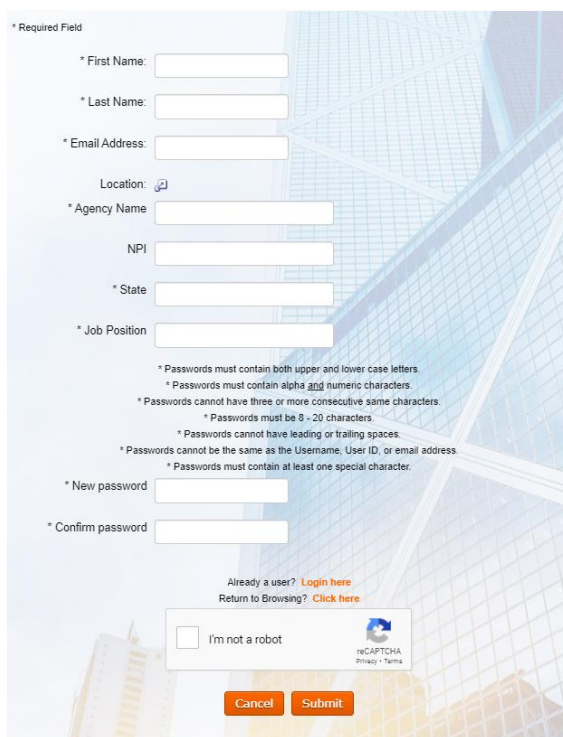
The self-registration process is the first step to getting started with Xchange. A new user must complete the self-registration form online prior to receiving access to Xchange. Once the self-registration process is complete, an AuthentiCare Xchange admin will review the submitted profile and approve the user registration within two business days. After the approval of the registration request, an email will be sent to notify the user that they have access to Xchange.

2.1 Self-Registration Information

The self-registration form collects user information to register for Xchange. An asterisk (*) identifies required fields.

The form requires the following information:

- **First Name***

- **Last Name***

- **Email Address*** – use the same email address used to log into AuthentiCare.

- **Location** – the time zone of the user completing the registration.

- **Agency Name*** – the title of the business where the user works. If the user identified as self-directed, the user should enter the name of the agency that manages the financial aspects of electronic visit verification (EVV).

- **NPI** – this is a required field. Type in the agency NPI or AuthentiCare Provider ID.

- **State*** – the state location of the agency.

- **Job Position*** – the role of the user at the provider agency. If the user works with self-directed services, enter "Self-Directed" in this field.

- **New Password*** – must comply with the password guidelines outlined on the *Self-Registration* page.

- **Confirm Password*** – must comply with the password guidelines outlined on the *Self-Registration* page.

Note: The reCAPTHA, or "I'm not a robot" field is required to complete and submit the Xchange self-registration form.

3.0 Xchange Navigation

3.1 Login Page

Once a Xchange admin grants approval to a new user, the user can go directly to the Xchange *Login* page to access all the trainings. Note that the link to the *Login* page is different than the self-registration link; the Login page link can be found with the hyperlink.

The image to the right is a view of the Xchange *Login* page. The email and password used to log in are the same used in the self-registration process.

For assistance with logging in, contact the AuthentiCare Help Desk (800-441-4667).
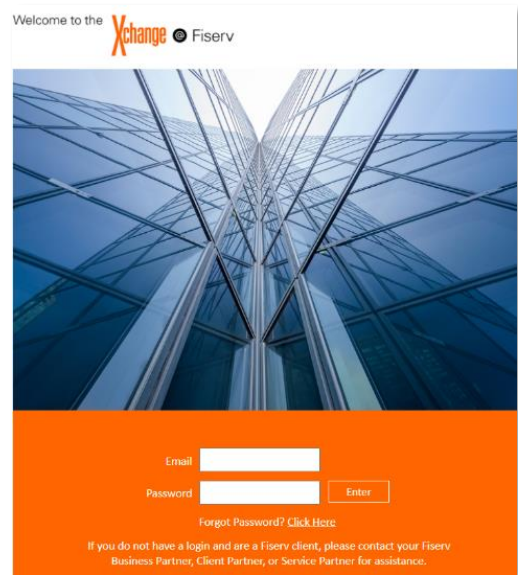
3.2 Welcome Page

Once a new user has successfully logged into Xchange, the system will automatically go to the *Xchange Welcome* page as seen below.

There are several links found on the *Xchange Welcome* page. Some of the links are found in circles at the top of the *Welcome* page; these links are described below.

Browse Catalog: One way a user can narrow down the list of available AuthentiCare trainings and curricula.

My Transcript: A location where all trainings and curricula that a user has registered for, is currently active on, or has completed can be found.

Learning Search: This is the recommended way for users to search for training and materials.

Events Calendar: A calendar of live and scheduled training events.

Additional Resources: A page with the contact information for the AuthentiCare Support Team.

Other functionalities are found in square pods at the bottom of the *Welcome* page; these pods are described below.

My Training
- A location that displays any trainings the user is currently active on or has been assigned.

My Inbox
- A place to view transcripts.

Featured Training
- A place where new or unopened training and curricula can be found.
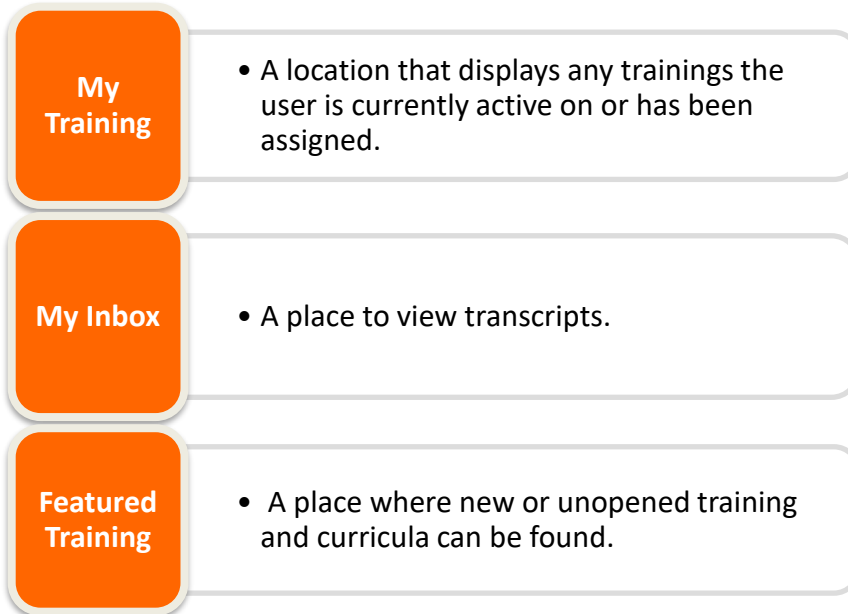
3.3 Navigation Menu

The Navigation Menu is located at the top left corner of the screen. There are two tabs, **Home** and **Learning.** Under each tab, there are multiple clickable pages.
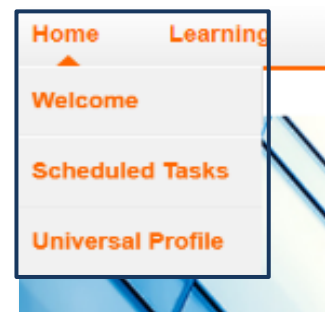

The training-related pages found under each tab are defined in the tables below.

Home	
Welcome	Takes the user back to the Xchange *Welcome* page.
Schedule Tasks	Tab not used at this time.
Universal Profile	Takes the user to a consolidated view of their personal information.

| Learning	
View Your Transcript	Takes the user to the transcript page with view of active and completed trainings.
Event Calendar	Takes the user to training calendar page for upcoming and past sessions.
Browse for Training	Takes the user to a browse page that shows all available trainings.
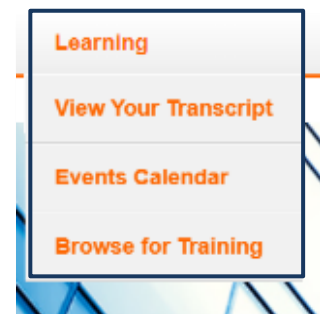
4.0 On-Demand Training

On-demand training resources are available to users at any time. This section outlines how to view recorded and printable training resources.

4.1 Watch Recorded Training Videos

There are several ways to find AuthentiCare training materials in Xchange, but the easiest way is through "Learning Search". To find training materials, complete the following steps:

1. Log into Xchange.
2. On the *Welcome* page, click **Learning Search**. The *Learning Search* screen appears.
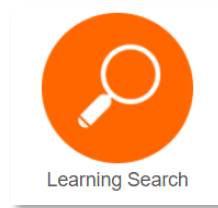
3. Find the training you would like to open and click the name of the training.
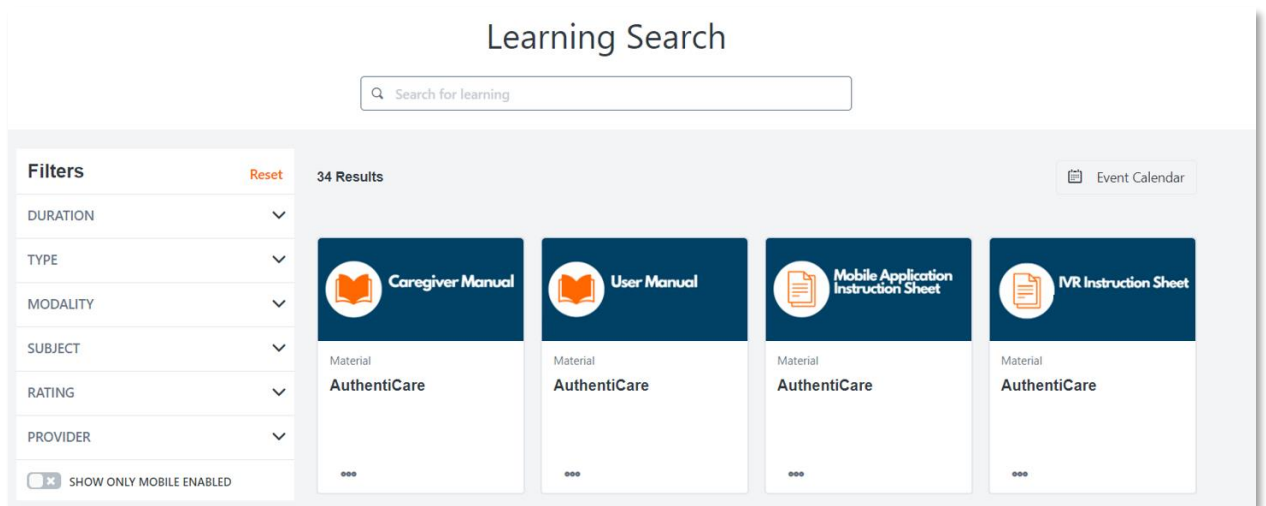
4. Click **Launch** to open the training material.

Note: If an annual training requirement needs to be fulfilled, open and complete the annual training curricula instead of watching individual training videos. Curricula are denoted by a stacked books icon, as seen to the right.

To open an annual training curriculum, click **Open Curriculum** and then click **Launch** on the first training material at the top of the page.

Note: Training materials, like a PDF file, will open in a new window. A video training will redirect to a new window with the video imbedded in the page.

5. If applicable, once the training is completed, click **Mark Complete**.

4.2 Finding Available Printable Training Resources

To find printable training materials, complete the following steps:

1. Log into Xchange.
2. On the *Welcome* page, click **Learning Search**. The *Learning Search* screen appears.

3. Find the training you would like to open and click the name of the training.

4. Click **Launch** to open the training material.

 Note: Training materials, like a PDF file, will open in a new window. A video training will redirect to a new window with the video imbedded in the page.
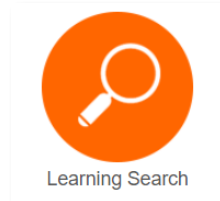
5. If applicable, once the training is completed, click **Mark Complete**.

5.0 Live Training

Live training is delivered virtually by a professional AuthentiCare trainer in real time. The section below outlines how to register and attend live training sessions.

> **Note**: For more information on how to utilize accessibility features, please refer to the link below.
>
> https://help.webex.com/en-us/article/krcq8ab/Webex-Training-Accessibility-Features
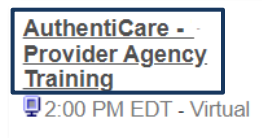
5.1 Registering for Live Training

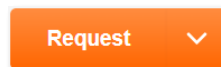To register a live training session, complete the following steps:

1. Log into Xchange.
2. On the *Welcome* page, click **Events Calendar**. The *Events Calendar* screen appears.
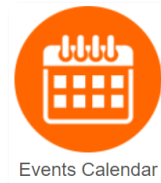
3. Find the live training in the *Events Calendar* and click the training link to attend.

4. Click **Request** to register for the training session.

5. When you successfully request to attend the session, a notice will populate on the bottom of the screen in black.
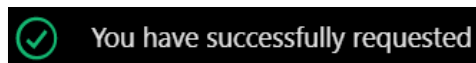
6. When successfully registered, the **Request** button is replaced with **Launch**.

> **Note**: If you click **Launch** before the session has started, you will see the message below.

Note: If the trainer has not joined the meeting yet, you will see the message below. Please stay on the page if the training sessions has not begun yet.

Sorry, the meeting or session has not yet been started by the host, or it has already ended.

5.2 Attending Live Training

To attend a live training session, complete the following steps:

1. When it is time to attend the session, click **Events Calendar**.

Events Calendar

2. Find and click the live training you would like to attend in the calendar.

AuthentiCare - Provider Agency Training
2:00 PM EDT - Virtual

3. Click **Launch** to attend training.

Launch

Note: If you click **Launch** before the session has started, you will see the message below.

You may not enter the webcast meeting until 60 minutes prior to the start of the meeting. Please come back in: 2 day(s) 20 hour(s) 10 minute(s)
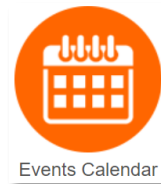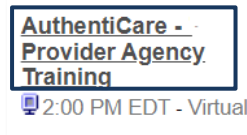
Note: If the trainer has not joined the meeting yet, you will see the message below. Please stay on the page if the training sessions has not begun yet.

Sorry, the meeting or session has not yet been started by the host, or it has already ended.

4. Click **Run a temporary application** at the bottom of the page.
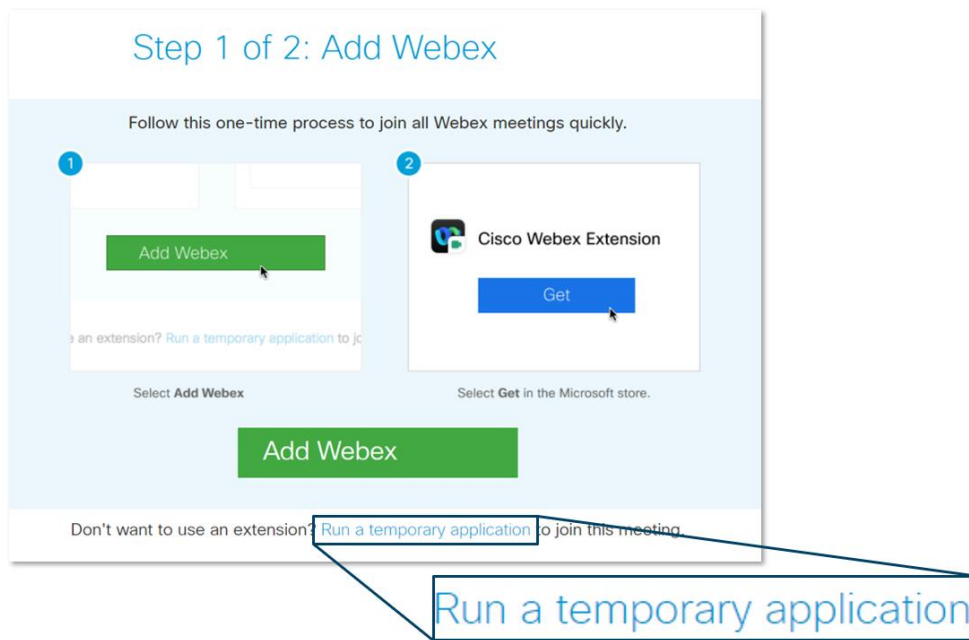
5. Double click the **file name** or click **Open File** to open the training session.

6. Click **Run** to open the training session.
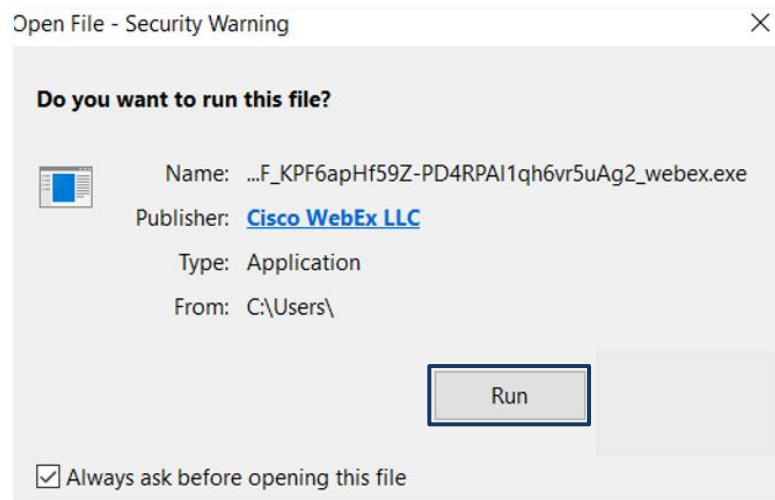
7. Select your audio preferences.
    - To use your computer for audio, click **Call Using Computer**.
    - To use your phone for audio, click **Use Phone**. Type in your phone number and then click **Call Me**. The system will call your phone with the training session audio.

8. You are logged into training.

5.3 Features Available in Training

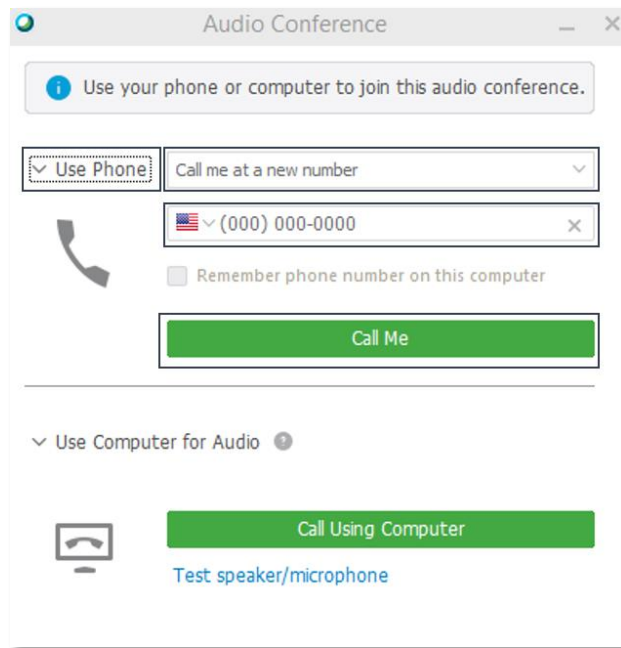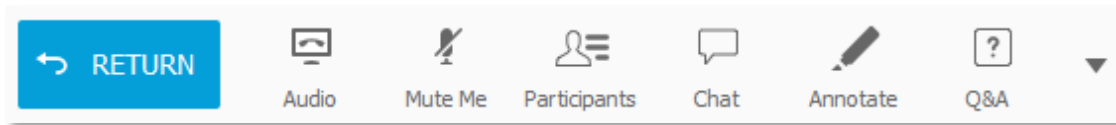During training, you will have access to the functionalities outlined below.

Audio: Change audio settings.	**Mute Me**: Mute (or unmute) your microphone.
Participants: View the trainer hosting the session and send emoticons.	**Chat**: Chat with the trainer and/or training attendees.
Annotate: Interact with training.	**Q&A**: This space is where attendees can ask questions.

6.0 Post Training Support

The section below outlines how to evaluate training and print certificates of completion.

6.1 Evaluation of Training

After completing each training, an **Evaluate** button will appear. The user can provide feedback regarding the training and the content that will be used to improve trainings. To evaluate a training, follow the steps below:
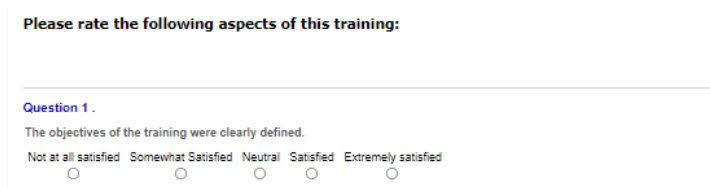
1. Complete a training in Xchange.
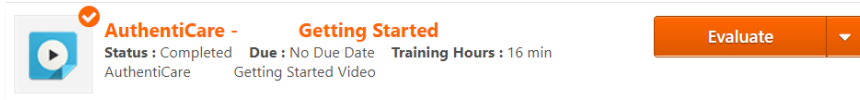
2. Click the **Evaluate** button.

3. Answer all the questions on the form.

4. At the bottom of the page, click **Submit Final Answers** when the evaluation is done. Click **Save/Return Later** to save current selections and complete the evaluation later.

6.2 Certificates of Completion

Once training is completed, certificates of completion can be downloaded from Xchange. Follow the process below to download certificates of completion.

1. Log into Xchange.
2. On the *Welcome* page, click **My Transcript**.
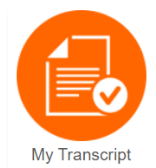
3. On the drop-down menu on the left-hand corner, select **Completed**.
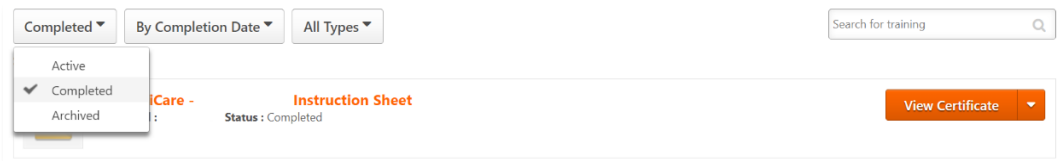
4. Click the **View Certificate** button. This will open a new window that will display the certificate of completion for the specific training.

5. The certificate will show the user's name, the name of the training and the date of completion.

Note: Trainings must be marked as complete for the user to receive credit and print a certificate.

Note: Curriculums receive only one certificate of completion per user.

7.0 Passwords

7.1 Password Policy

AuthentiCare and Xchange both require strong passwords for enhanced account security. Passwords in Xchange must follow the following password criteria:

- Passwords must contain both upper and lower-case letters
- Passwords must contain alpha and numeric characters
- Passwords cannot have three or more same characters
- Passwords cannot be the same as the previous 12 passwords
- Passwords must be 8 - 20 characters
- Passwords cannot have leading or trailing spaces
- Passwords cannot be the same as the Username, User ID, or email address
- Passwords must contain at least one special character

7.2 Forgot Password?

Follow the instructions below to reset a password in Xchange.

1. Go to the Xchange Login page, which can be found with the hyperlink in step 1.
2. Click **Click Here** next to "Forgot Password?".

3. Type in your email address in the **Login Credential** field on the *Forgot Password* page. Then confirm that you are not a robot and click **Submit**.

4. A notice will pop up on the screen showing the request to reset your password was received. Click **OK**.

Forgot password?

A request to reset your account password was received.
If the account is valid and active, the password reset email will be sent to your on-file email address in few moments.
For additional assistance, please contact your system administrator. Thank you.

OK

5. You will receive an email with a link to reset your password.

Note: The link to reset your password is valid for 48 hours. After the 48-hour window, you will need to start from Step 1 if you still need to reset your password.

Xchange@Fiserv.com

We received a request from you to reset your password to the Fiserv Xchange portal. You may reset your password by clicking the following link: https://fiserv.csod.com/resetPasswrd.aspx?token=XOEK8fmTj003TyZvxVzl&c=fiserv&l=en-US

Please be aware that this URL link is valid for 48 hours. After the 48-hour validity period, clicking this link will navigate you to a page on which you must enter your login name to generate and email a new link.

You may also select the "Forgot Password?" link from the portal login page at any time to generate a new password reset URL.

Thank you.

Reply | Forward

6. The link will direct you to the *Reset Password* page. Type in your **new password** and then confirm your new password. Note that your password must follow the strong password guidelines as outlined in section 4.1. Then click **Submit**.

Reset Password

* Passwords must contain both upper and lower case letters.
* Passwords must contain alpha and numeric characters.
* Passwords cannot have three or more consecutive same characters.
* Passwords cannot be the same as the previous 12 passwords.
* Passwords must be 8 - 20 characters.
* Passwords cannot have leading or trailing spaces.
* Passwords cannot be the same as the Username, User ID, or email address.
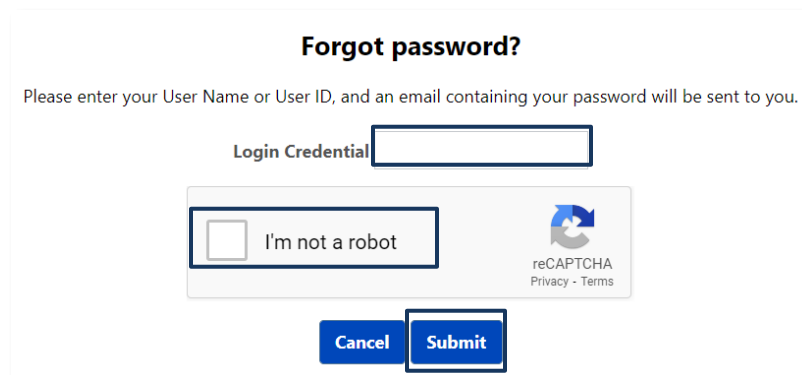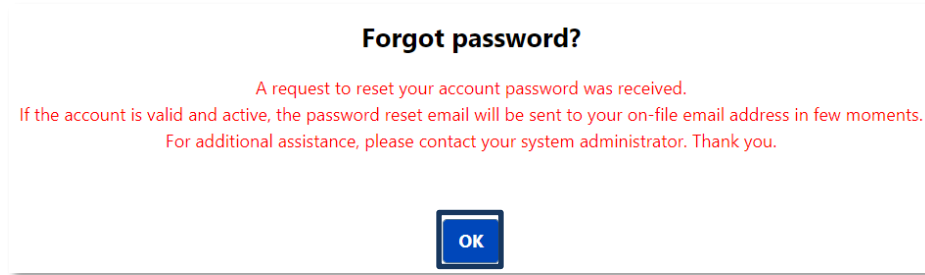* Passwords must contain at least one special character.

* New password [   ]

* Confirm password [   ]

Cancel   Submit

7. Once your password has been successfully reset, the browser will take you back to the *Xchange Login* page where you can sign in.

8. Type in your email and password and then click **Enter** to log in.

8.0 Glossary

The glossary below defines key terminology in Xchange as it pertains to AuthentiCare.

8.1 Type

The icons below show all the training types that can be found in Xchange.

Icons			
🖥 Online Class	📅 Event	📚 Curriculum	🖼 Material
🏛 Library	📋 Test	▶ Video	🗔 External Content
📄 Playlist			

8.2 User Roles

The list of users and their roles can be found below. This is helpful to know which training is right for each user.

User(s)	
Agency User	A user who supports agency-based waivers/services.
Self-Directed User	A user who supports self-directed or consumer-directed waivers/services.
State User	A user who supports state administrator activities.

8.3 Provider – Xchange

In AuthentiCare, "provider" refers to the Medicaid provider agency. In Xchange, "provider" refers to the group that creates the Xchange training. Thus, "provider" should always be *Fiserv AuthentiCare* for this training.

8.4 Hyperlinks

A hyperlink is a link that will take a user to a different section of the manual or to a website by clicking on it. Hyperlinks in this document appear as light blue, underlined text as seen below.

<div align="center">Login page</div>

8.5 Training Status

The list below contains the learning transcript statuses, their definitions, and any required actions.

Status	Description	Action
Registered	The user receives this status for training when training has been added to their transcript, and no further actions are required prior to taking the training.	• Select the **Launch** button to begin the training.
In Progress	This status appears when a training item is currently in progress. This appears once the user has Launched a training but has not completed all the training requirements.	• Select the **Launch** button to continue the training. • Select the **Mark Complete** button to acknowledge completion of the training.
Completed	The training is complete, and all required evaluations and acknowledgments are complete.	• No further action is required. • The user can view the certification(s) of completed training in **My Transcript.**

9.0 Support

For additional assistance, contact the AuthentiCare Help Desk Monday through Friday from 7:00 AM to 7:00 PM:

- **Email**: AuthentiCare.Support@Fiserv.com
- **Phone**: 800-441-4667