



# Xchange User Guide

AuthentiCare® Learning Management System

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# 1.0 Introduction

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## 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 access AuthentiCare training resources, and if applicable, complete annual training.

## 1.2 Useful Links

To access Xchange, the first step is to self-register. Once self-registration is completed and approved, new users can login to Xchange to access online training resources. Reference the links below to complete self-registration and to login to Xchange.

1. [Self-Registration](#) – The *Self-Registration* link leads to the online self-registration form. All new users need to self-register before getting access to Xchange. For more information on self-registration, refer to [Section 2](#).  
**Self-Registration Link:** <https://fiserv.csod.com/selfreg/register.aspx?c=authenticare>
2. [Login Page](#) – The *Login* page link allows access to Xchange 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

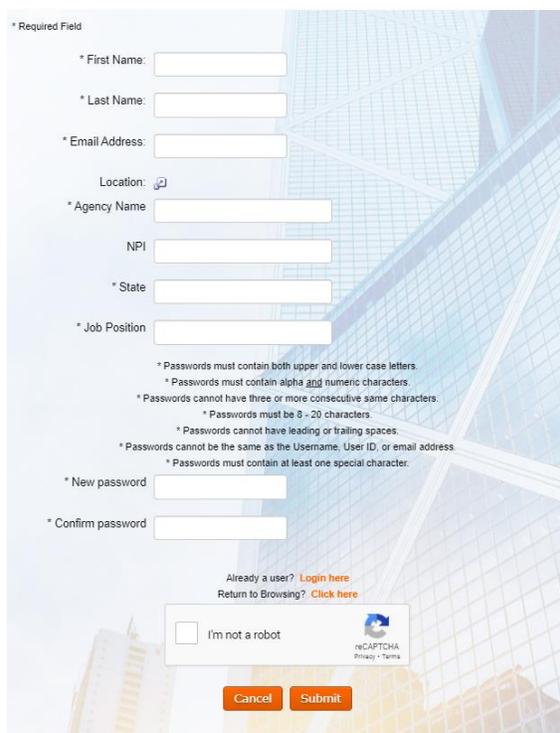
The self-registration process is the first step to getting started with Xchange. A new user must complete the [self-registration](#) form online prior to receiving access to Xchange. Once the self-registration process is complete, an AuthentiCare Xchange admin will review the submitted profile and approve 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

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\***
- **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.



The screenshot shows a self-registration form with the following fields and labels:

- \* Required Field
- \* First Name:
- \* Last Name:
- \* Email Address:
- Location:
- \* Agency Name:
- NPI:
- \* State:
- \* Job Position:
- \* New password:
- \* Confirm password:

Below the fields, there are several password guidelines:

- \* 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 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.

At the bottom of the form, there are links for "Already a user? [Login here](#)" and "Return to Browsing? [Click here](#)". There is also a reCAPTCHA "I'm not a robot" checkbox and "Cancel" and "Submit" buttons.



**Note:** The reCAPTCHA, 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 section displaying all trainings in which the user is currently enrolled 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.

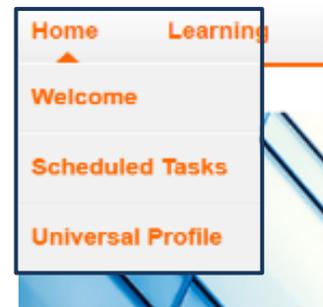
### 3.3 Navigation Menu

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.

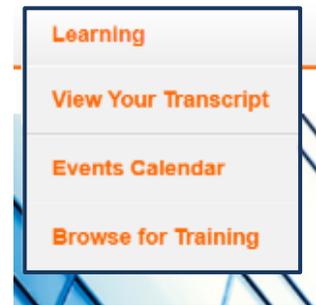


The training-related pages found under each tab are defined in the tables below.

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



Learning	
<b>View Your Transcript</b>	Takes the user to the transcript page with view of active and completed trainings.
<b>Event Calendar</b>	Takes the user to training calendar page for upcoming and past sessions.
<b>Browse for Training</b>	Takes the user to a browse page that shows all available trainings.



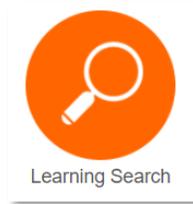
## 4.0 On-Demand and Printable Training

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

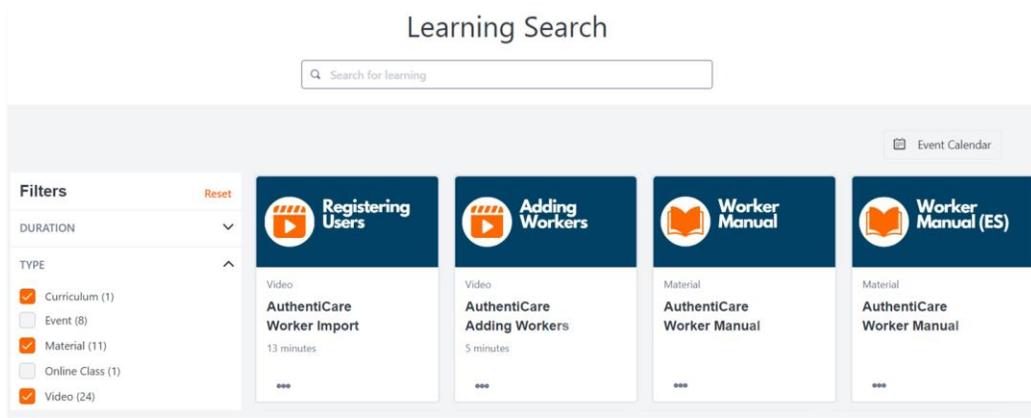
### 4.1 View On-Demand and Printable Training

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 steps below.

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. For printable materials only, click **Mark Complete**. For video materials, watch the entire video for the training to be marked completed on your transcript.





### Notes:

- If annual training needs to be completed, open the annual training curricula instead of watching individual training videos.
- To open an annual training curriculum, click **Open Curriculum** and then click **Launch** on the first training material at the top of the page.



### Learn about AuthentiCare!

Options ▾

This curriculum arranges the AuthentiCare training videos in the recommended sequence for beginners to start using the system.

	<b>AuthentiCare - Getting Started</b> Status : Completed Due : No Due Date Training Hours : 10 min This training video reviews how to get started in AuthentiCare.	Launch ▾
	<b>AuthentiCare - Multi-factor Authentication</b> Status : Not Activated Due : No Due Date Training Hours : 6 min This training video discusses how multi-factor authentication works.	Activate ▾
	<b>AuthentiCare - Navigating the Web Portal</b> Status : Not Activated Due : No Due Date Training Hours : 3 min AuthentiCare Kansas - Navigating the Web Portal	Activate ▾

## 5.0 Live Training

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



**Note:** For more information on how to utilize accessibility features during live training, refer to the link below.

<https://help.webex.com/en-us/article/krcq8ab/Webex-Training-Accessibility-Features>

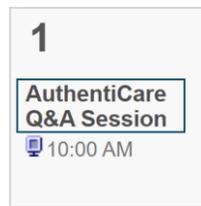
### 5.1 Registering for Live Training Sessions

To register a live training session, complete the steps below.

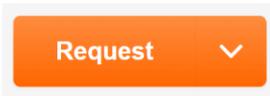
1. Log into Xchange.
2. On the *Welcome* page, click **Events Calendar**. The *Events Calendar* screen appears.



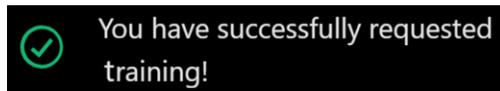
3. Find the live training in the *Events Calendar* and click the training link to attend.



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**.





#### Notes:

- 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)

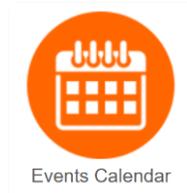
- If the trainer has not joined the meeting yet, you will see the message below. Stay on the page until the training begins.

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

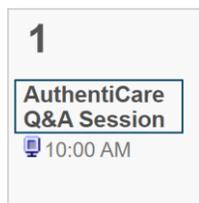
## 5.2 Attending Live Training Sessions

To attend a live training session, complete the steps below.

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



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



3. Click **Launch** to open training.



#### Notes:

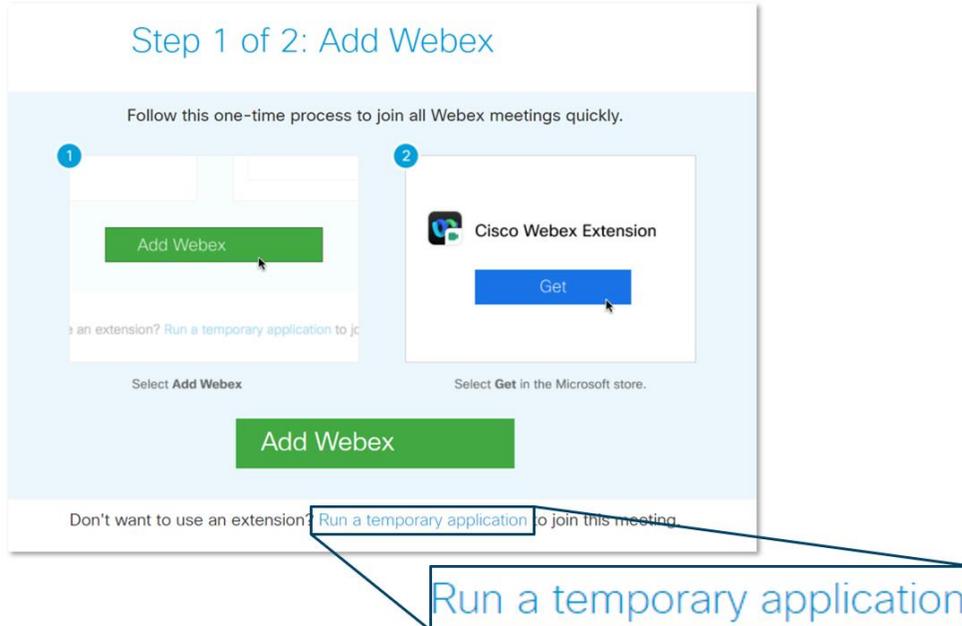
- If you click **Launch** before the session has started, you will see the message below.

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)

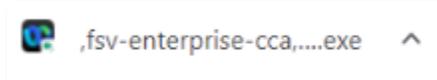
- If the trainer has not joined the meeting yet, you will see the message below. Stay on the page until the training begins.

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

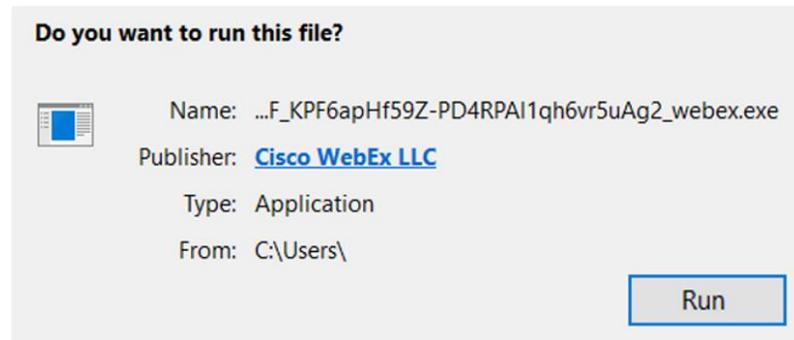
4. Click **Run a temporary application** at the bottom of the page.



5. Double click the **file name** or click **Open File** to open the training session.



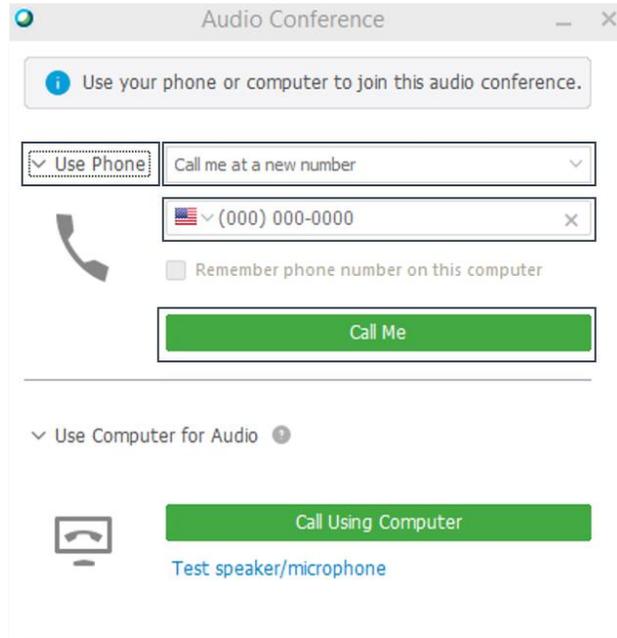
6. Click **Run** to open the training session.



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 Live Training Sessions

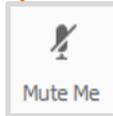
During training, you will have access to the functionalities outlined below.





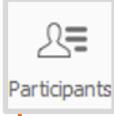
Audio

**Audio:** Change audio settings.



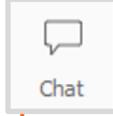
Mute Me

**Mute Me:** Mute (or unmute) your microphone.



Participants

**Participants:** View the trainer hosting the session and send emoticons.



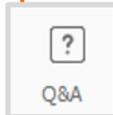
Chat

**Chat:** Chat with the trainer and/or training attendees.



Annotate

**Annotate:** Interact with training.



Q&A

**Q&A:** This space is where attendees can ask questions.

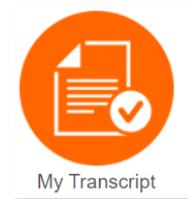
## 6.0 Post Training Features

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

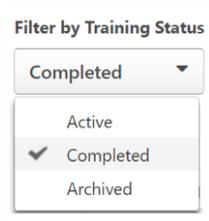
### 6.1 Evaluation of Training

After completing training, users can provide feedback To evaluate a training, follow the steps below:

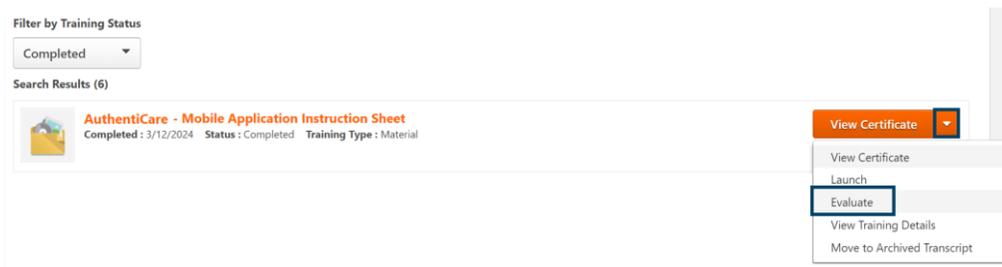
1. Log into Xchange.
2. On the *Welcome* page, click **My Transcript**.



3. On the drop-down menu on the left-hand side, select **Completed**.



4. On the right, click the downwards arrow and then the **Evaluate** menu option.



5. Answer the questions on the survey. When finished, click **Submit Final Answers**.

Please complete this quick 2-minute survey to improve AuthentiCare training.

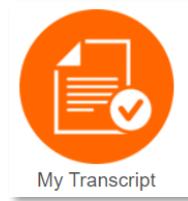
**Question 1 .**  
How useful did you find the document?  
Not useful at all   Slightly useful   Moderately useful   Very useful   Extremely useful

**Question 2 .**  
How easy was the document to understand?  
Very hard   Somewhat hard   Neither easy nor hard   Somewhat easy   Very easy

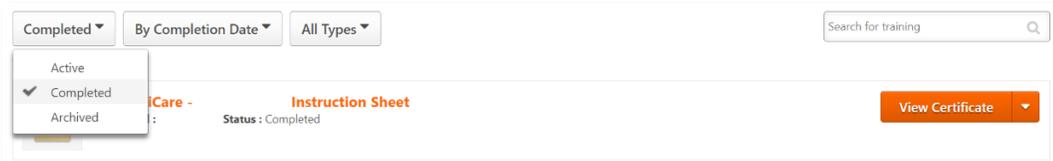
## 6.2 Certificates of Completion

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.

1. On the *Welcome* page, click **My Transcript**.



2. On the drop-down menu on the left-hand corner, click **Completed**.



3. Click **View Certificate**. This will open a new window that will display the certificate of completion for the specific training.



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



### Notes:

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

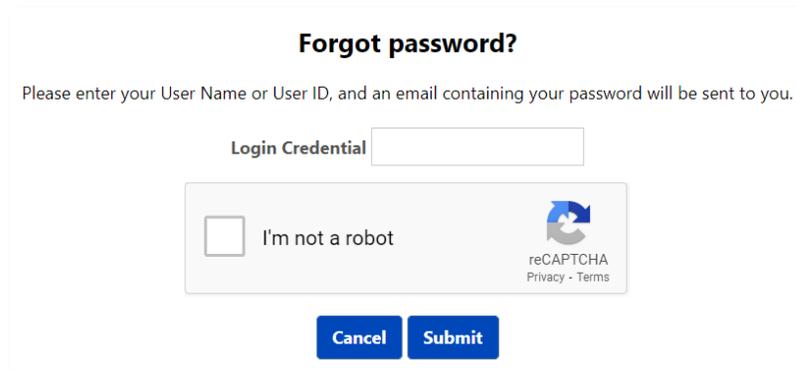
Follow the instructions below to reset a password in Xchange.

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?”.



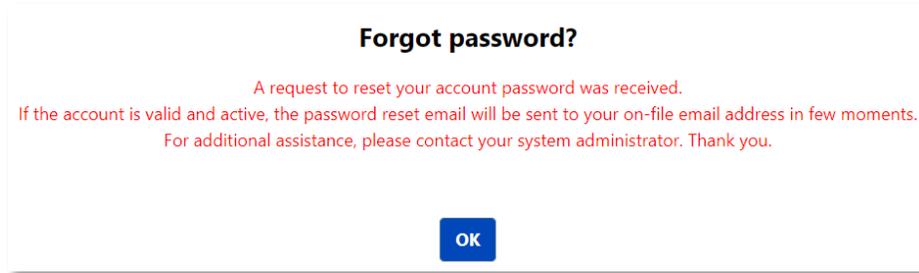
The image shows a login form on an orange background. It has two input fields: "Email" and "Password". To the right of the "Password" field is a button labeled "Enter". Below the "Password" field is a link that says "Forgot Password? Click Here".

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**.



The image shows the "Forgot password?" page. At the top, it says "Forgot password?". Below that, it says "Please enter your User Name or User ID, and an email containing your password will be sent to you." There is a text input field labeled "Login Credential". Below the input field is a reCAPTCHA widget with a checkbox and the text "I'm not a robot". To the right of the checkbox is the reCAPTCHA logo and the text "reCAPTCHA Privacy - Terms". At the bottom of the form are two buttons: "Cancel" and "Submit".

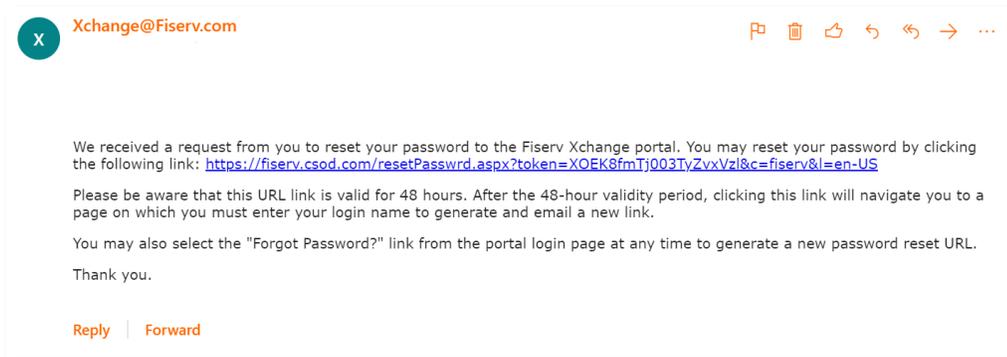
4. A notice will pop up on the screen showing the request to reset your password was received. Click **OK**.



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.



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](#).
7. 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

8. Once your password has been successfully reset, the browser will take you back to the *Xchange Login* page where you can sign in.
9. Type in your email and password. Then, click **Enter**.

Welcome to the **Xchange**  Fiserv



Email

Password

Forgot Password? [Click Here](#)

If you do not have a login and are a Fiserv client, please contact your Fiserv Business Partner, Client Partner, or Service Partner for assistance.

## 8.0 Glossary

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

### 9.1 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			

### 9.2 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.

### 9.3 Tip: Providers in 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.

### 9.4 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.

[Login page](#)

### 9.5 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.	<ul style="list-style-type: none"> <li>• Select the <b>Launch</b> button to begin the training.</li> </ul>
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.	<ul style="list-style-type: none"> <li>• Select the <b>Launch</b> button to continue the training.</li> <li>• Select the <b>Mark Complete</b> button to acknowledge completion of the training.</li> </ul>
Completed	The training is complete, and all required evaluations and acknowledgments are complete.	<ul style="list-style-type: none"> <li>• No further action is required.</li> <li>• The user can view the certification(s) of completed training in <b>My Transcript</b>.</li> </ul>

## 9.0 Support

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

- **Email:** [AuthentiCare.Support@Fiserv.com](mailto:AuthentiCare.Support@Fiserv.com)
- **Phone:** 800-441-4667