



## Patient Portal Registration Guide

At CCRM Boston you will be set up on two different patient portals, a **Clinical Portal** and an **Administrative Portal**. This document is intended to help with the setup process. Additionally, we ask that you complete certain paperwork on both portals before your appointment.

For your first time visiting the portals, you will receive emails from both portals and should initially access the portals via these emails. After your initial portal setup, you should access both portals through our website at: <https://www.ccrmivf.com/bostonpatientportal/>. As shown in this screenshot, the website provides a breakdown on how you can utilize both portals, and a link to access each portal.

A screenshot of the CCRM Boston Patient Portal welcome page. The page has a white background with two vertical pink bars on the left and right sides. The main heading is 'Welcome to the CCRM Boston Patient Portal' in a dark green, serif font. Below the heading are two light beige rectangular boxes. The left box is titled 'Clinical Portal' and lists four bullet points: 'Request prescription refills', 'Access test results', 'Access and update health history information', and 'Privately message your nurse'. Below the list is a pink button with the text 'PORTAL SIGN IN'. The right box is titled 'Administrative Portal' and lists four bullet points: 'Conveniently request and view upcoming appointments', 'Pay or view your bills', 'Complete and print administrative forms', and 'Privately message administrative and financial team members'. Below the list is a pink button with the text 'PORTAL SIGN IN'.

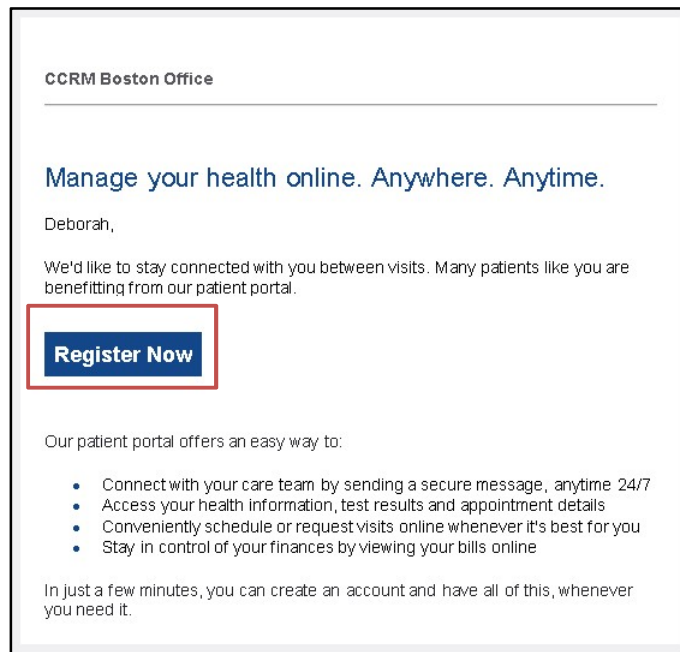
## Setting Up Your Portal Accounts

In order to utilize both of these portals, please see the setup instructions below. We recommend setting up your portals from a computer, not a cell phone. Also, it is recommended to use Google Chrome for both portals.

Please keep in mind that these are two separate portals. The username to both of these portals will be your email address provided during registration. We recommend making the password the same for both accounts in order to streamline your login process.

### Administrative Portal

- 1) You will receive a message to the email address you provided our staff. Follow the “Register Now” button.



2) A new webpage will open to complete “Account Registration”

Return to Sign In

## Account Registration

To help us protect your health information, please verify your identity using a temporary passcode.

How would you like us to send your temporary passcode?

Call (xxx) xxx-2889

Text (xxx) xxx-2889

Continue

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3) Enter the temporary passcode you will receive through a call or text

Return to Sign In

## Account Registration

To help us protect your health information, please verify your identity using a temporary passcode.

We will text you a temporary passcode in the next 90 seconds.

Temporary passcode \*

Back Continue

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4) Create a password and confirm the password

**CCRM**

[Return to Sign In](#)

## Account Registration

Please create a password for your account.

Password \*

Confirm password \*

Your password must include:

- Between 8 and 20 characters
- At least one uppercase letter
- At least one lowercase letter
- At least one number or symbol

Remember this computer to save time resetting your password.

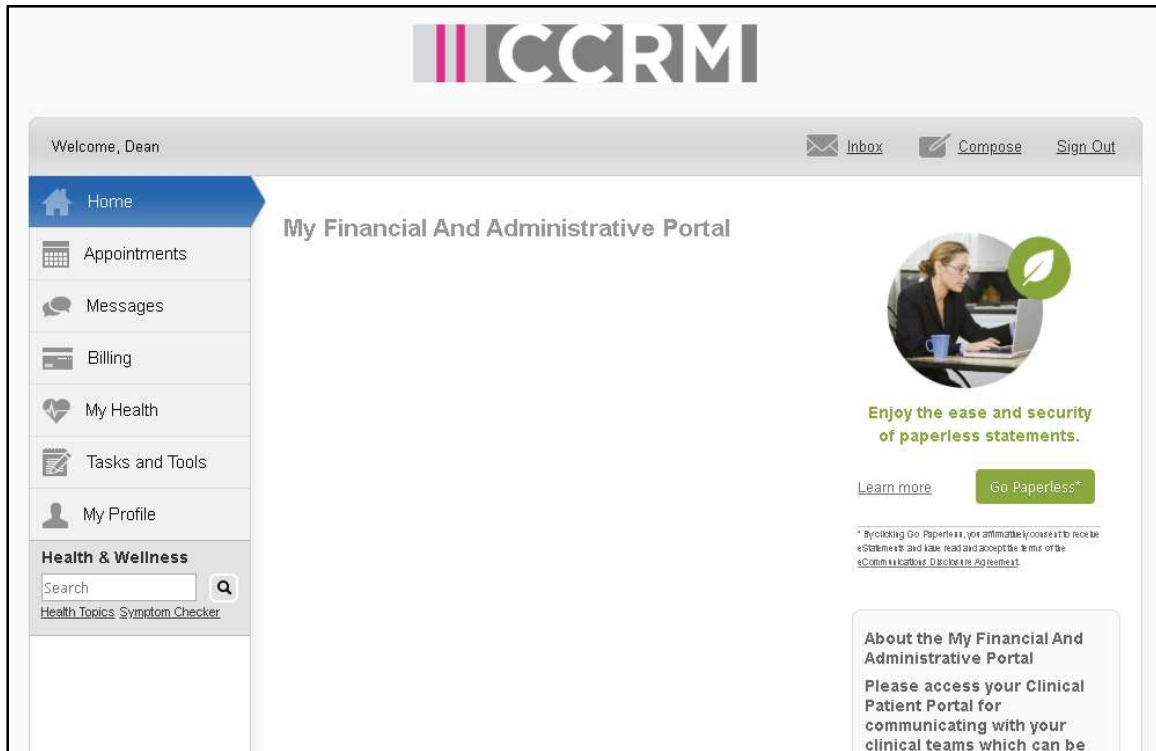
I have read and accepted the [Terms and Conditions](#) and [Privacy Policy](#)

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## Utilizing the Administrative Portal

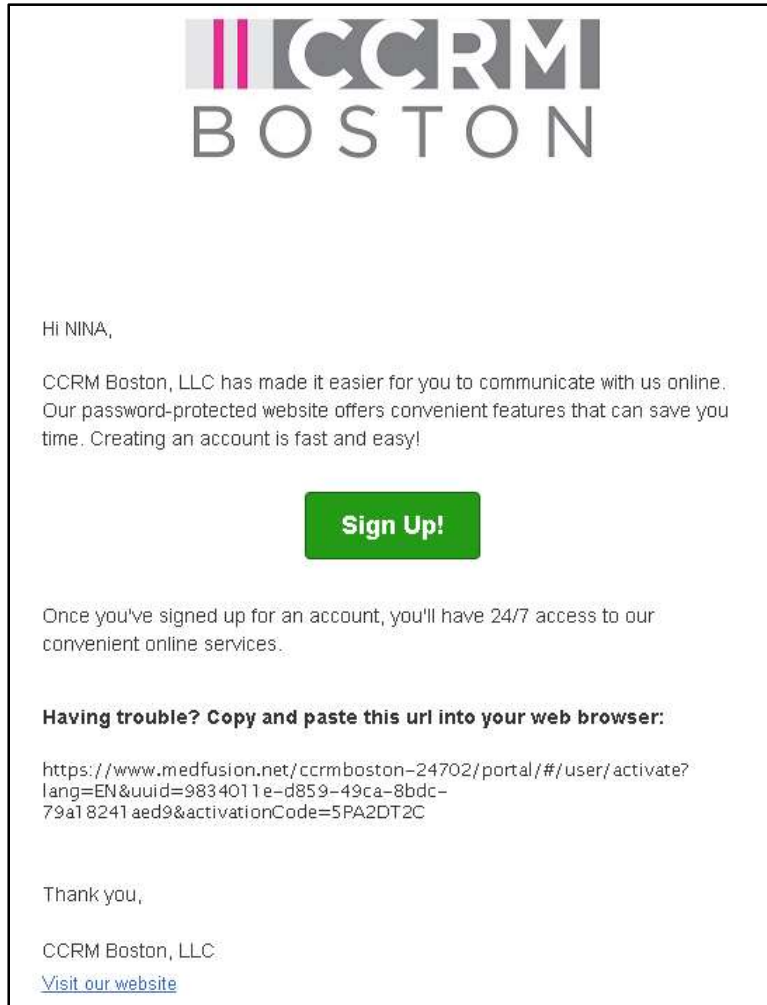
In the administrative patient portal, you will be able to view your appointment history and request to schedule an appointment, message your Financial Coordinator, view your billing history and pay your bill, or edit your demographic or insurance information by selecting the appropriate option on the portal's homepage.



- 1) Appointments - Select to view your past or upcoming appointments
- 2) Messages - Select to view past messages or to compose a new message to a member of CCRM's administrative or financial team. You can also request to be scheduled for an appointment.
- 3) Billing - Select to view your billing and payment history. You can also pay your bill online.
- 4) My Health - Electronically sign the administrative new patient consent forms. Select the Medical Forms option to access the consent forms. **Please complete at least 3 days prior to your appointment.**
- 5) My Profile - Select to view/update your demographic or insurance information, change your notification preferences, and manage your patient portal account.

## Clinical Portal

- 1) Within 24 hours of scheduling your appointment you will receive an email from the Clinical Portal. Select the "Sign Up!" button.



- 2) You'll be asked to verify your zip code and date of birth. Enter the information and select continue.

The screenshot shows the CCRM Boston portal verification page. At the top left is the CCRM BOSTON logo. The main heading is "Please Verify Some Information" with a subtext: "Please enter your date of birth and zip code so that we can verify you." Below this, there is a "ZIP code" input field. Underneath is the "Date of birth" section, which includes a "Month" dropdown menu, a "Day" input field, and a "Year" input field. At the bottom of the form area, there are two buttons: "Cancel" on the left and "Continue" on the right. The footer contains the "medfusion" logo and a copyright notice: "© 2020 Medfusion, Inc. All rights reserved. All other trademarks are the property of their respective owners."

- 3) Create your user name, password, secret question and answer, and enter your phone number. Choose a CCRM Boston location to be your Primary Location. Select the "Enter Portal" button.

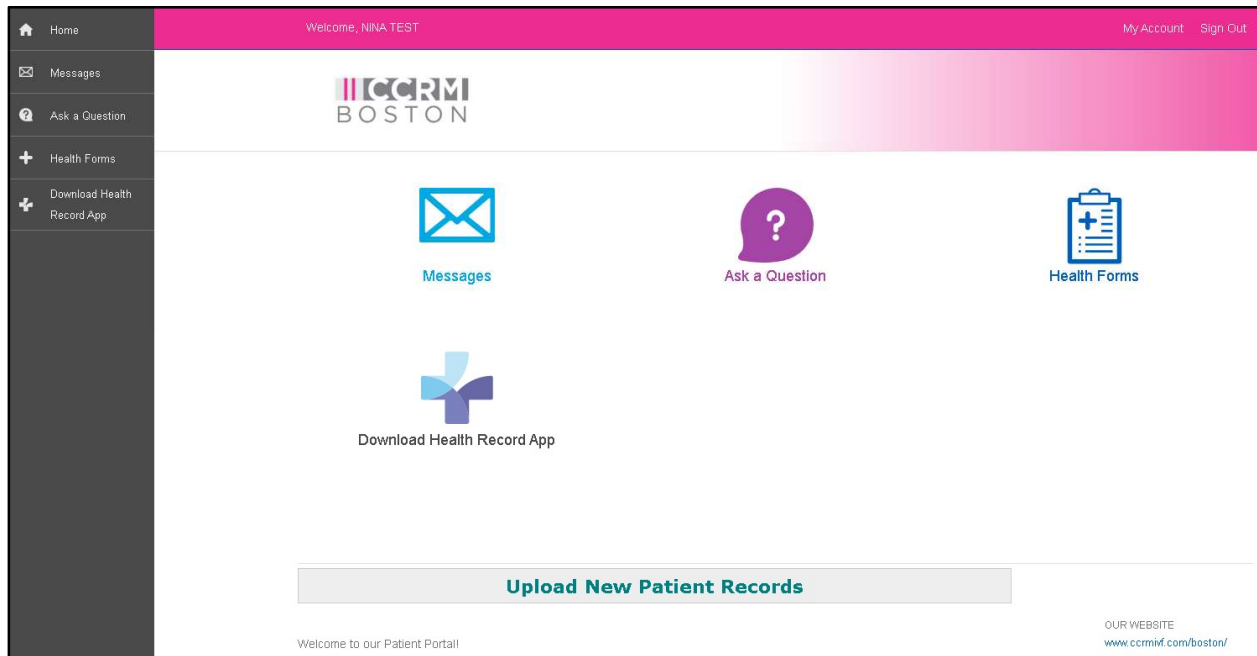
The screenshot shows the CCRM Boston portal security details creation page. At the top left is the CCRM BOSTON logo. The main heading is "Welcome! Create Security Details" with a subtext: "Thank you for joining the portal. Please create a password and answer a secret question." The form is divided into several sections: "User name" with an input field; "Secret Question" with a dropdown menu; "Password" with an input field and a note: "Your password must contain 8-32 characters, include no common words, and fulfill three of the following: one capital letter, one lower case letter, one number, one symbol (&%#@!?)"; "Answer" with an input field; "Phone" with three input fields and a "Type" dropdown menu set to "Mobile"; and "Primary Location" with a dropdown menu set to "Enter Location". At the bottom, there is a checkbox area with the text: "By creating an account, I accept my health care provider's Notice of Privacy Policy and the Terms of Service." and a green "Enter Portal" button.

- 4) Your clinical patient portal account will now be registered and you will be directed to the portal's homepage.

## Utilizing the Clinical Portal

In the clinical patient portal, you will be able to complete your new patient medical history forms, message with a member of your clinical care team, download the Medfusion Plus app, and upload your medical records.

### Clinical Portal Homepage

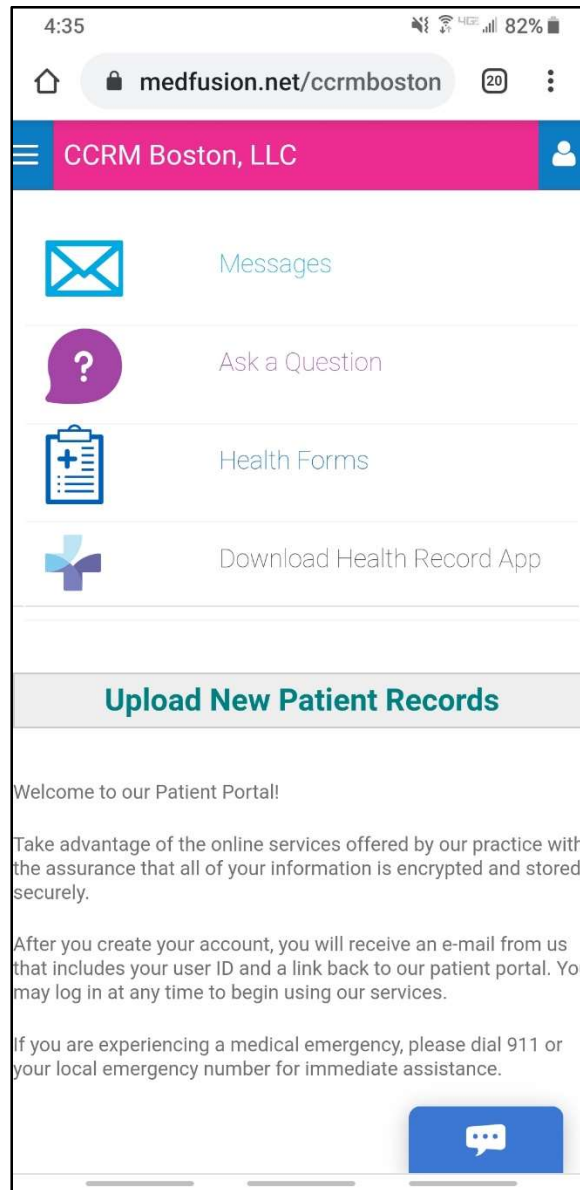


- 1) Messages – Select to view past messages with a member of your CCRM clinical care team.
- 2) Ask a Question – Select to compose a message to a member of your CCRM clinical care team
- 3) Health Forms – Select to complete your Family and Personal Medical History form. **This form must be completed prior to your New Patient Consult appointment.**
- 4) Download Health Record App – Select to download the Medfusion Plus app for your tablet or mobile device.
- 5) Upload New Patient Records – Select to upload digital copies of your medical records to CCRM. This option is also available on the clinical portal sign in page. You will be prompted to create a login and password the first time you attempt to upload your records. This login and password will not be associated with the logins used to access your clinical portal or administrative portal.



## Accessing the Clinical Portal from Your Mobile Phone

You can conveniently access your clinical portal via the Medfusion Plus mobile app, available for both Apple and Android devices. The clinical portal is also mobile-friendly, allowing you to access your clinical portal and message with your clinical care team directly from your smartphone.



### How to Get Help

If you need assistance while completing your patient portal registration prior to your new patient appointment, please contact the CCRM Boston at (617) 449-9750. We are here to help and answer any of your questions.

Once you have completed your new patient appointment, your local care team will provide you with the appropriate support resources for any needs that arise.

Thank you for being a patient with CCRM.