



## Patient Portal Registration and DocuSign Guide

At CCRM Dallas-Fort Worth 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 through the clinical portal and through DocuSign before your appointment.

After being scheduled for New Patient Consult appointment, you will receive emails from DocuSign and 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/dfwpatientportal/>. As shown in this screenshot, the website provides a breakdown on how you can utilize both portals, and a link to access each portal.

# Welcome to the CCRM Dallas-Fort Worth Patient Portal

## Clinical Portal

- Complete your new patient paperwork and medical history
- Privately message your nurse and other clinical staff members

PORTAL SIGN IN

## Administrative Portal

- Pay or view your bills
- Privately message administrative and financial team members
- Conveniently request and view upcoming appointments

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.


### Clinical Portal

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

## CCRM DFW, LLC

HI OLIVER,

CCRM DFW, LLC has made it easier for you to communicate with us online. Our password-protected website offers convenient features that can save you time. Creating an account is fast and easy!



Once you've signed up for an account, you'll have 24/7 access to our convenient online services.

**Having trouble? Copy and paste this url into your web browser:**

<https://www.medfusion.net/ccrmdfw-24701/portal/#/user/activate?lang=EN&uuid=b6bbaf15-7918-424c-a68c-45486ec29dc5&activationCode=UK267XK6>

Thank you,

CCRM DFW, LLC  
[Visit our website](#)



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

The screenshot shows a web page for CCRM DFW, LLC with a blue header. The main heading is "Please Verify Some Information" with a sub-heading "Please enter your date of birth and zip code so that we can verify you." Below this are input fields for "ZIP code" and "Date of birth" (Month, Day, Year). At the bottom are "Cancel" and "Continue" buttons. The footer includes the "medfusion" logo and copyright text: "© 2019 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. Select the "Enter Portal" button.

The screenshot shows a web page for CCRM DFW, LLC with a blue header. The main heading is "Welcome! Create Security Details" with a sub-heading "Thank you for joining the portal. Please create a password and answer a secret question." Below this are input fields for "User name", "Secret Question", "Password", "Answer", and "Phone". A note specifies password requirements: "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 (&%#@!?)". At the bottom are a checkbox for "Notice of Privacy Policy and the Terms of Service" and an "Enter Portal" button.

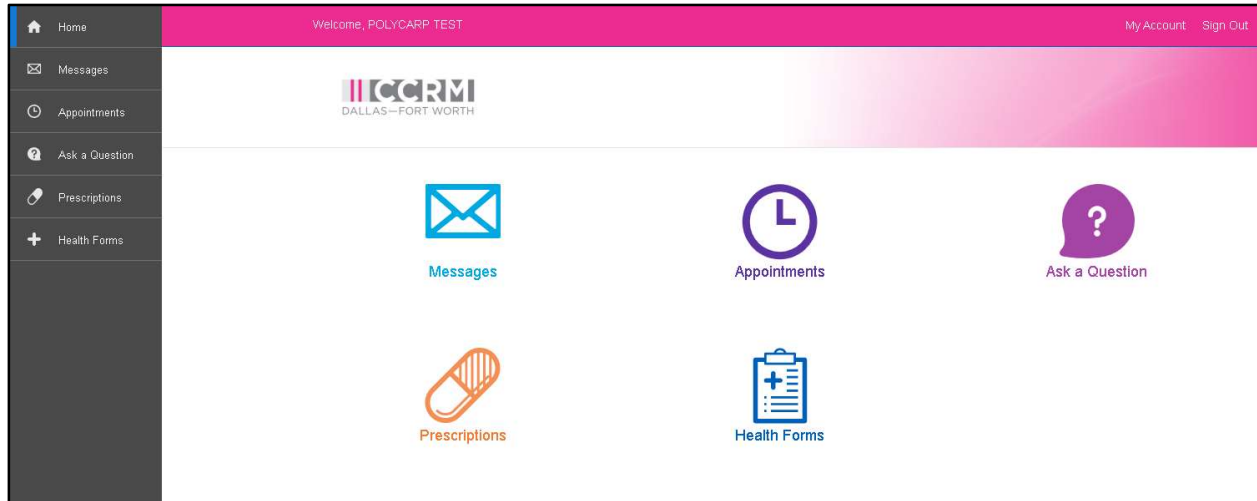
- 4) Your clinical patient portal account will now be registered and you will be directed to the portal's homepage.



## 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, and submit a prescription renewal request.

### Clinical Portal Homepage



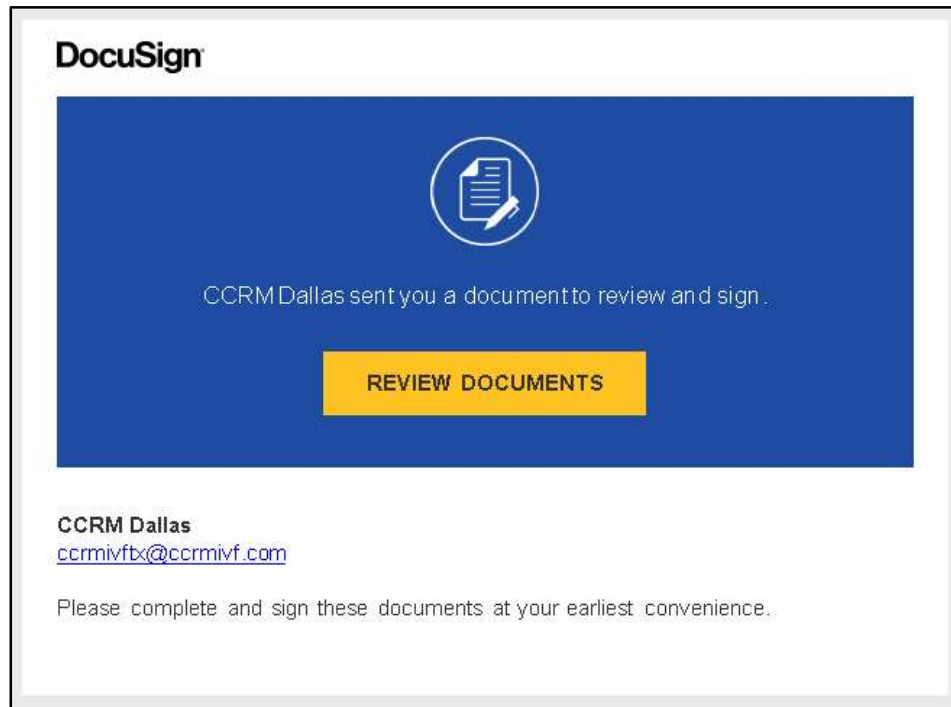
- 1) Messages - Select to view past messages with a member of your CCRM clinical care team.
- 2) Ask a Question - Select to compose a message to a member of your CCRM clinical care team
- 3) Health Forms - Select to complete you Family and Personal Medical History form. This form must be completed prior to your New Patient Consult appointment.



## Utilizing DocuSign

Your administrative New Patient Registration Forms will be emailed for completion through the use of DocuSign. These forms must be completed prior to your New Patient Consult appointment.

DocuSign Email



Select Review Documents to begin reviewing and signing your New Patient Registration Forms.



All documents requiring your review and signature will be presented together. Review each document and complete the necessary fields. Some fields will be required while others will be optional. If a required field is not applicable to you, please enter "N/A". The tab to the left of the document will help you identify the next field requiring your attention. Once you have completed all fields, select Finish at the top of the screen.

Please review the documents below.

FINISH
OTHER ACTIONS

START

both or you in the consent. Should you and your partner not agree on the treatment options, CCRM requires you to set up a regroup with your physician or treatment team to discuss. The initiation of your treatment will not begin until all parties are in agreement and consents are signed. Some consents are required to be signed in person by all parties with a CCRM staff member as a witness. Additionally, some consents may require a notary prior to initiation of treatment (these consents will be provided to you in paper format at your appointment).

Sign  
↓

Tester11/1/2019 | 10:56 AM EDT

Print Patient Name	Signature	DOB	Date
-- select --			
Government ID – Patient		ID Number	
Print Partner Name	Signature	DOB	Date
Government ID – Partner		ID Number	
Practice Representative		Date	

I/We confirm that I have read and fully understand the information contained in this consent and agreement and have been given an unrestricted opportunity to ask questions and receive answers to my/our satisfaction and understanding. I further understand that if I have any remaining or additional questions or concerns, I should contact a CCRM physician or nurse. I understand that participation is purely voluntary and that my refusal to participate or withdraw from the program at any time will not involve any penalty or loss of benefit to which I am otherwise entitled. I am of sound mind and understand that, if signing this document electronically subject to my agreement and understanding, that my electronic signature has the same force and effect in acknowledging my understanding and consent as set forth above, as if I had signed this consent and agreement in person before a notary public.

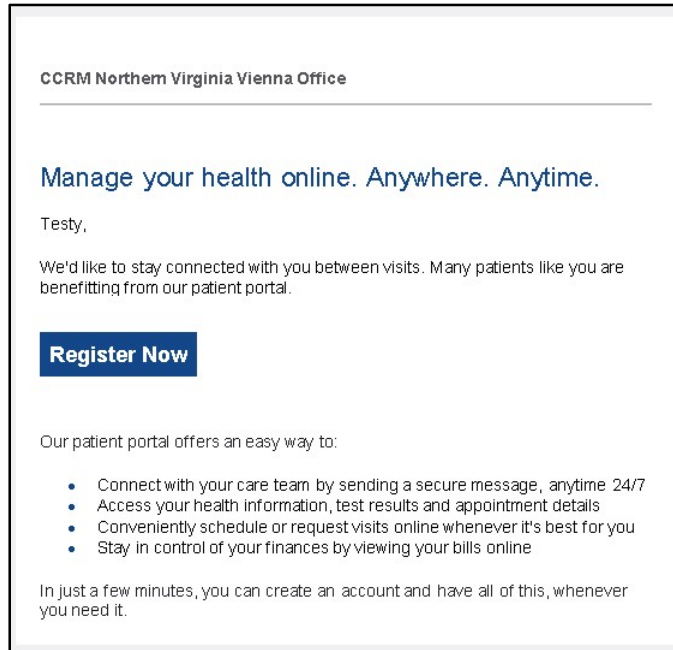
Page 1 of 1 Original 6.26.17; Revised 9.14.17; 4.13.18; 4.2.19

Patient Name: Tester
DOB: 
Partner Name: 
DOB:

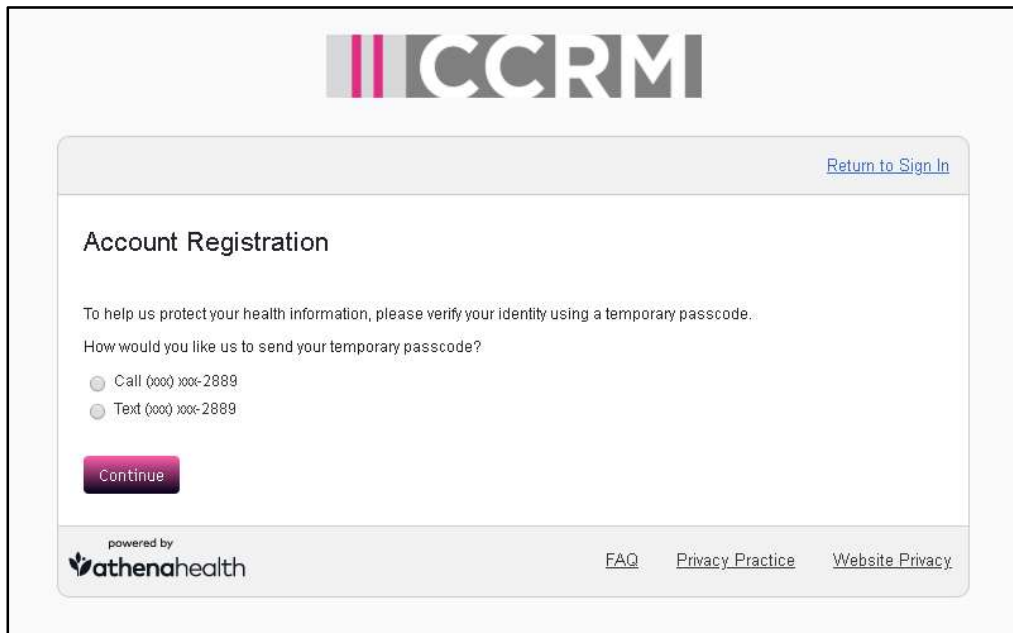


## Administrative Portal

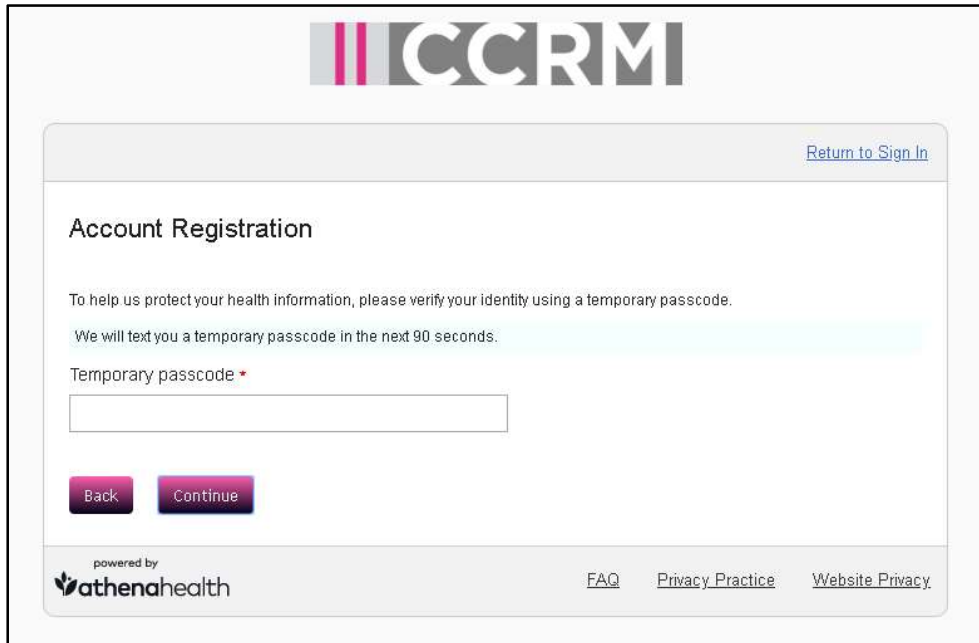
- 1) You will receive a message to the email address you provided our staff. Follow the “Register Now” button.



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

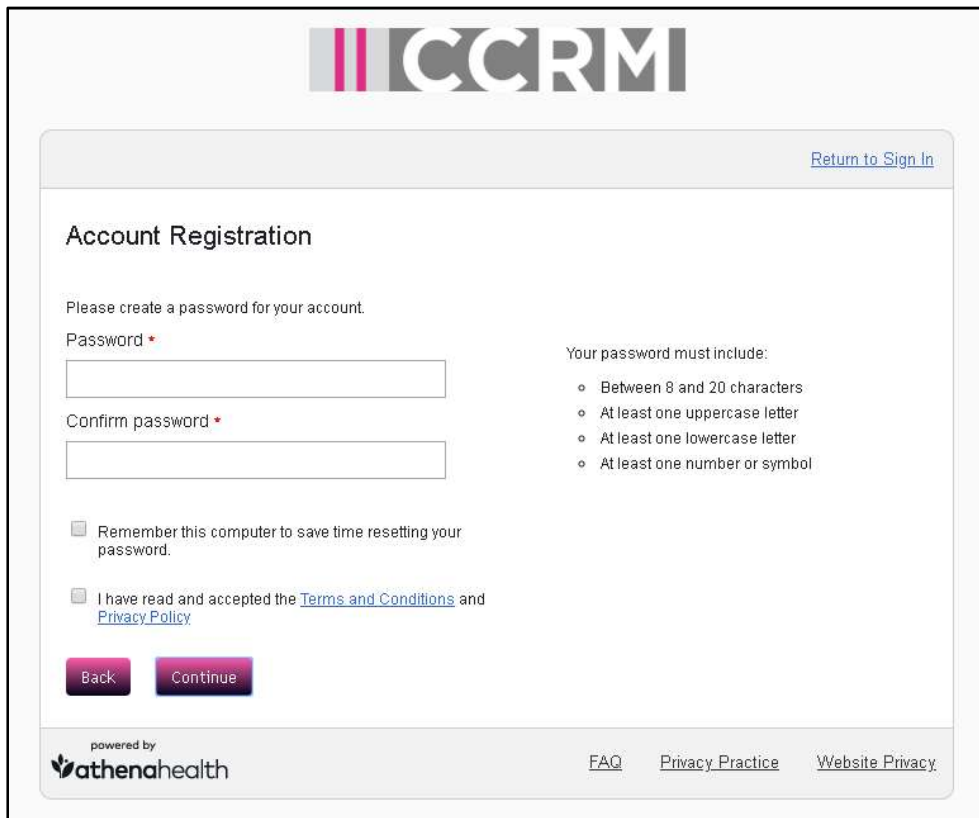


3) Enter the temporary passcode you will receive through a call or text



The screenshot shows the 'Account Registration' page. At the top right is a link 'Return to Sign In'. The main heading is 'Account Registration'. Below it, the text reads: '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.' There is a text input field labeled 'Temporary passcode \*'. Below the field are two buttons: 'Back' and 'Continue'. At the bottom, it says 'powered by athenahealth' with links for 'FAQ', 'Privacy Practice', and 'Website Privacy'.

4) Create a password and confirm the password



The screenshot shows the 'Account Registration' page. At the top right is a link 'Return to Sign In'. The main heading is 'Account Registration'. Below it, the text reads: 'Please create a password for your account.' There are two text input fields: 'Password \*' and 'Confirm password \*'. To the right of the fields, the text reads: 'Your password must include:' followed by a list of requirements: 'Between 8 and 20 characters', 'At least one uppercase letter', 'At least one lowercase letter', and 'At least one number or symbol'. Below the fields, there are two checkboxes: 'Remember this computer to save time resetting your password.' and 'I have read and accepted the Terms and Conditions and Privacy Policy'. At the bottom, there are two buttons: 'Back' and 'Continue'. At the very bottom, it says 'powered by athenahealth' with links for 'FAQ', 'Privacy Practice', and 'Website Privacy'.

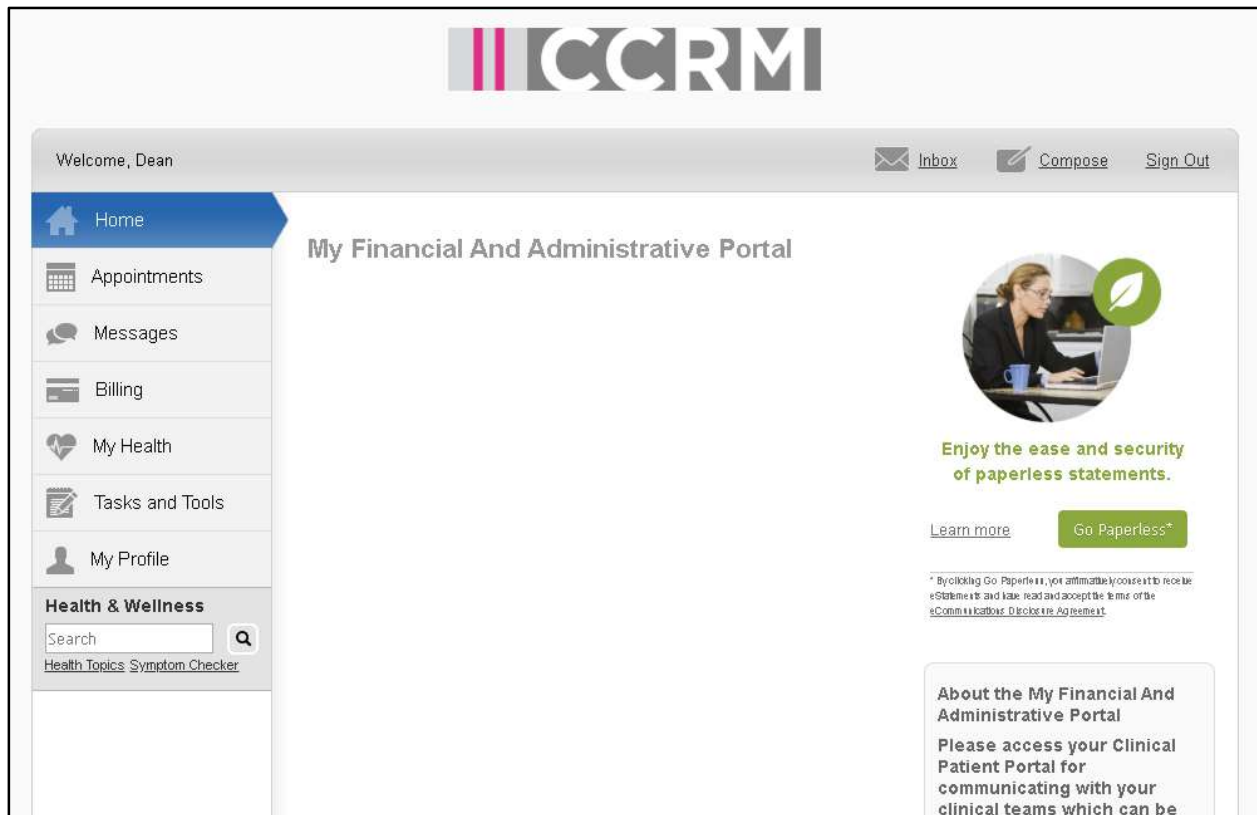




## Utilizing the Administrative Portal

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.

### Administrative Portal 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 Profile - Select to view/update your demographic or insurance information, change your notification preferences, and manage your patient portal account.



## How to Get Help

If you need assistance while completing your patient portal registration prior to your new patient appointment, please contact the CCRM Patient Support Center at (877) 201-6931. 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.