



Patient Portal Registration Guide

At CCRM San Francisco 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/sfpatientportal/>. 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 San Francisco Patient Portal

Clinical Portal

- Access and update health history information
- Privately message your nurse and other clinical staff members

PORTAL SIGN IN

Administrative Portal

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

PORTAL SIGN IN

Medical Records Upload

Instructions for How to Securely Upload Your Medical Records

CLICK HERE TO UPLOAD MEDICAL RECORDS

*Please note:

- You need to create a separate account (not the same as your clinical portal log-in information)
- Please do not use your phone for medical records upload.
- Files should be uploaded as .pdf (.jpeg files will not upload successfully).
- Chrome is the best internet browser for this process.

Helpful Information

- Portal Registration Guide
- Recommended Medical Records & Medical Records Release Form
- CCRM Fertility Education Videos
- Zika Information and Consent Form
- Insurance Participation
- Questions to Ask Your Insurance Provider About Fertility Benefits
- CCRM Fertility Support & Mentorship Facebook Group

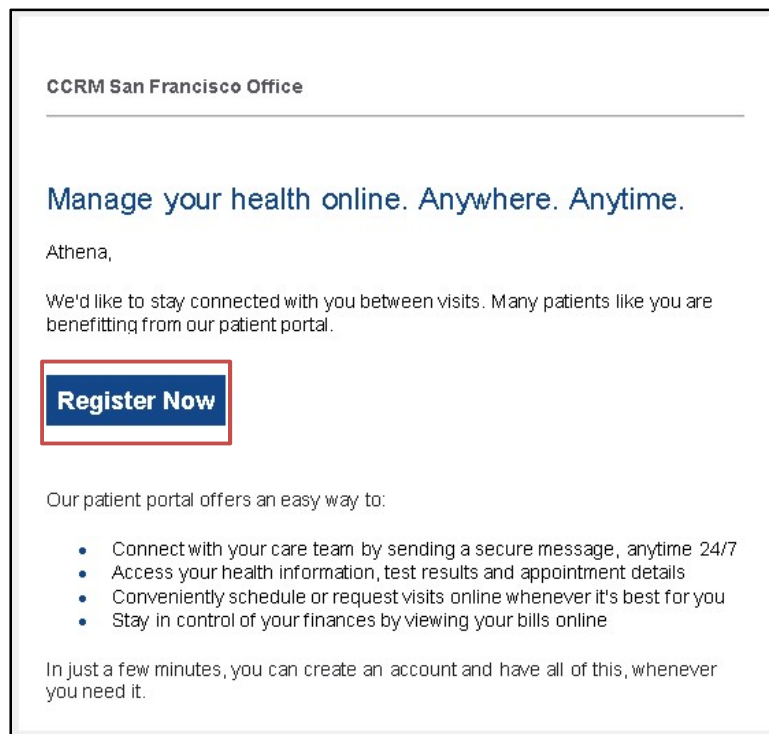
Setting Up Your Portal Accounts

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”.



CCRM

[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

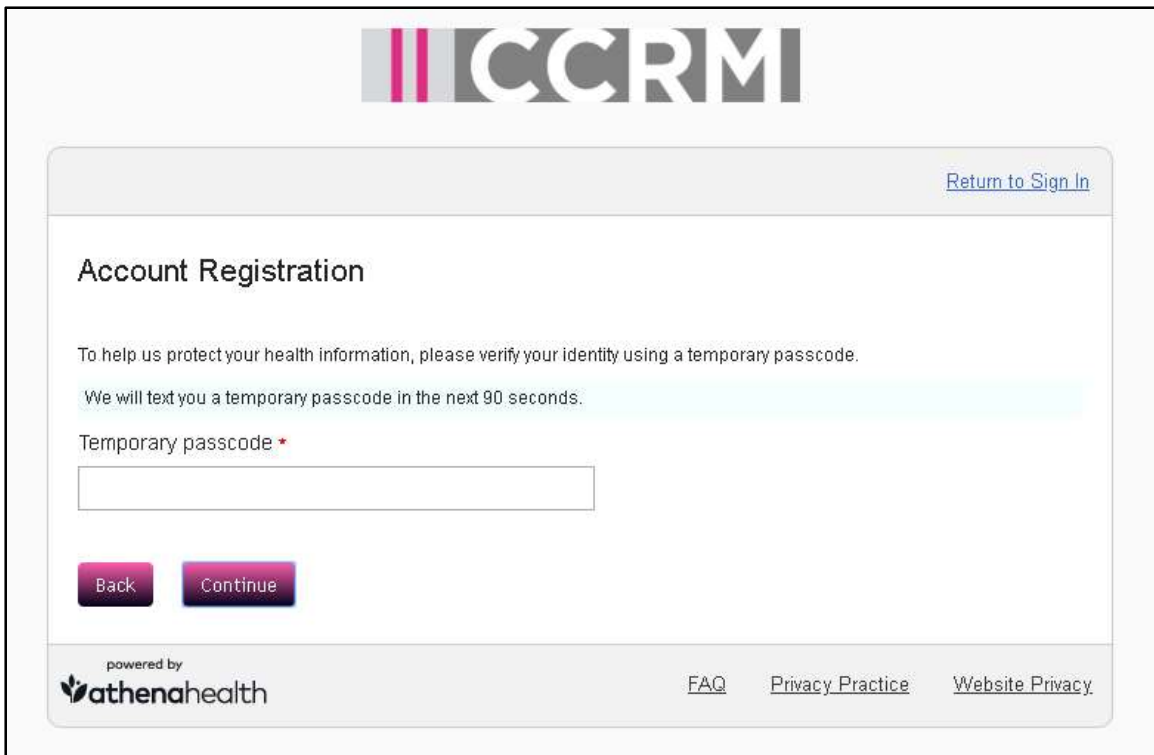
☐ Text (xxx) xxx-2889

[Continue](#)

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



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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.



[Return to Sign In](#)

Account Registration

Please create a password for your account.

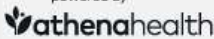
Password *

Confirm password *

☐ 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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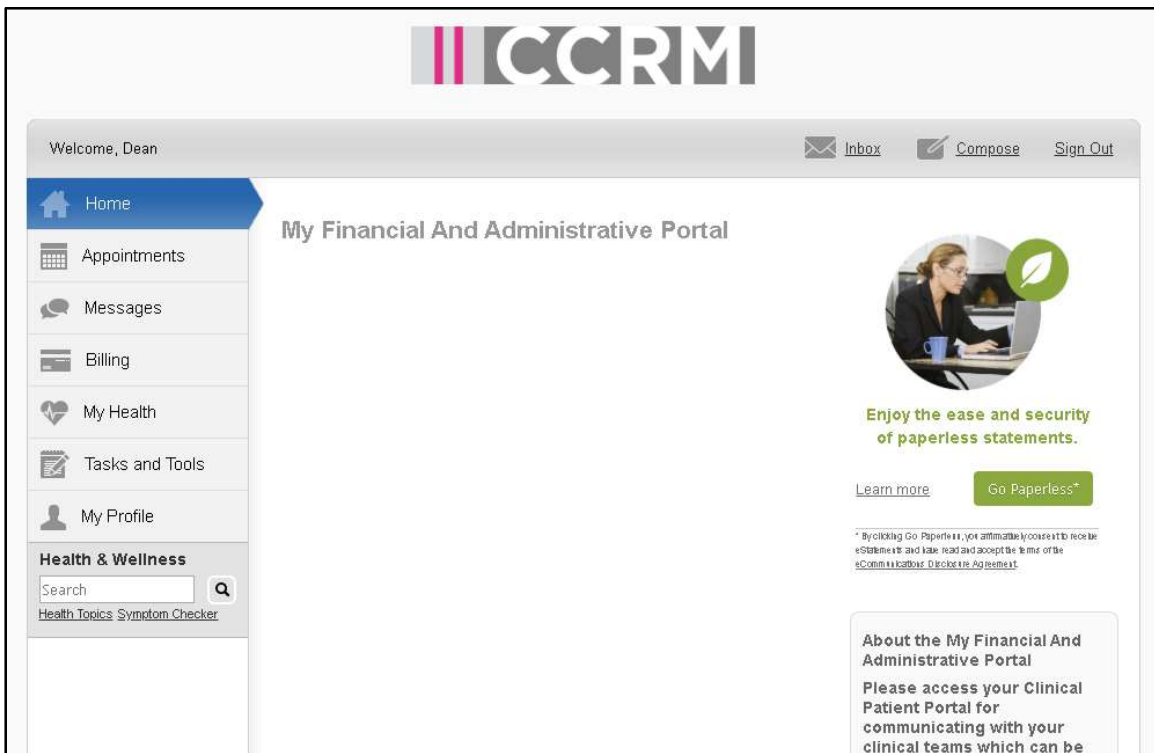
[FAQ](#)[Privacy Practice](#)[Website Privacy](#)

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

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 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.

CCRM San Francisco, LLC

HI OLIVER,

CCRM San Francisco, 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!

Sign Up!

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/ccrmsanfrancisco-24704/portal/#/user/activate?lang=EN&uuid=6095085b-d6fc-4e66-aea2-e01564150322&activationCode=DJ4PP92W>

Thank you,

CCRM San Francisco, LLC

[Visit our website](#)

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



Please Verify Some Information

Please enter your date of birth and zip code so that we can verify you.

ZIP code

Date of birth

Month

Day

Year

Cancel

Continue

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- 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 form titled "Welcome! Create Security Details" with a sub-header "Thank you for joining the portal. Please create a password and answer a secret question." The form is divided into two columns. The left column contains fields for "User name" and "Password". Below the password field, there is a list of 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 (&%#@!?)". The right column contains a "Secret Question" dropdown menu, an "Answer" text field, and a "Phone" section with three input boxes and a "Type" dropdown menu set to "Mobile". At the bottom of the form, there is a line of 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.

CRM
SAN FRANCISCO

Welcome! Create Security Details

Thank you for joining the portal. Please create a password and answer a secret question.

User name

Secret Question

Password

Answer

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 (&%#@!?)

Phone Type

By creating an account, I accept my health care provider's [Notice of Privacy Policy](#) and the [Terms of Service](#).

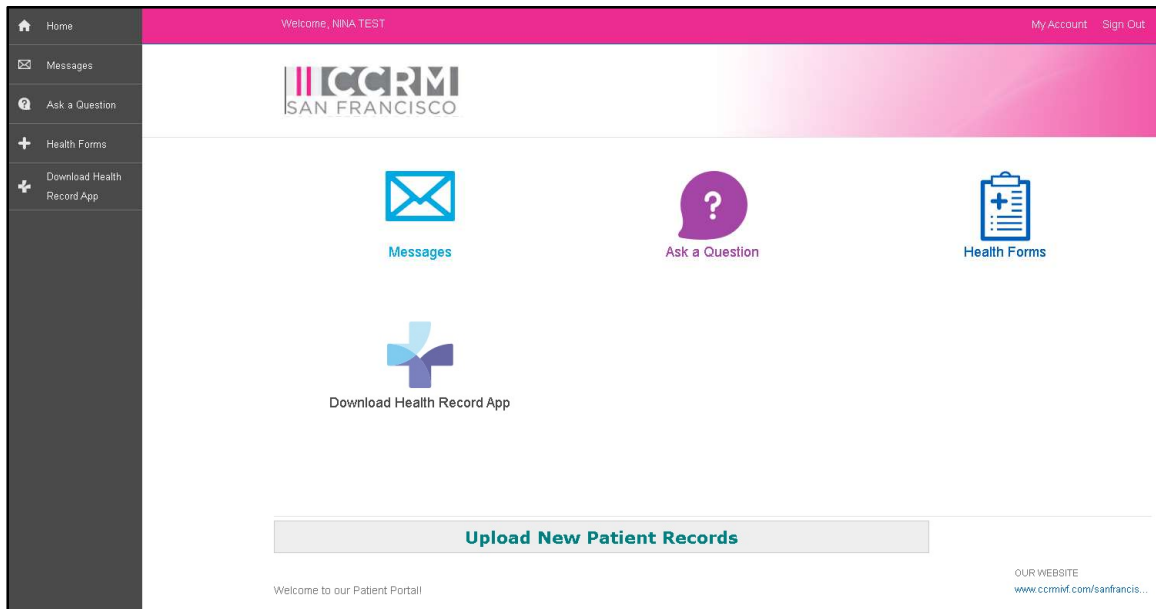
Enter Portal

- 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 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.

How to Get Help

If you need assistance while completing your patient portal registration prior to your new patient appointment, please contact CCRM San Francisco at (650) 646-7500. 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.