

Sunrise Patient Portal 18.4

Patient Help Sunrise Patient Portal 18.4 Online Help

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Table of Contents

Welcome to Sunrise Patient Portal.....	5
Frequently Asked Questions.....	7
Log on to Sunrise Patient Portal.....	9
Navigating Sunrise Patient Portal	11
Retired data.....	13
Accessing Your Health Information	15
Connecting to your patient record in your healthcare organization's system	15
Connecting to your personal health record.....	15
Connecting to multiple personal health records.....	16
Disconnecting from a data source.....	16
Viewing the patient header.....	17
Web Parts.....	19
Minimizing and Restoring Web Parts	19
Using the Options Menu	21
Accessing online Help	23
Printing in Sunrise Patient Portal.....	25

Working with reports.....	27
CCD Audit Detail Report	27
Generate the CCD Audit Detail report	27
Navigating the report.....	28
Adjusting the Zoom	28
Search the report.....	28
Download the report.....	28
Print the report.....	29

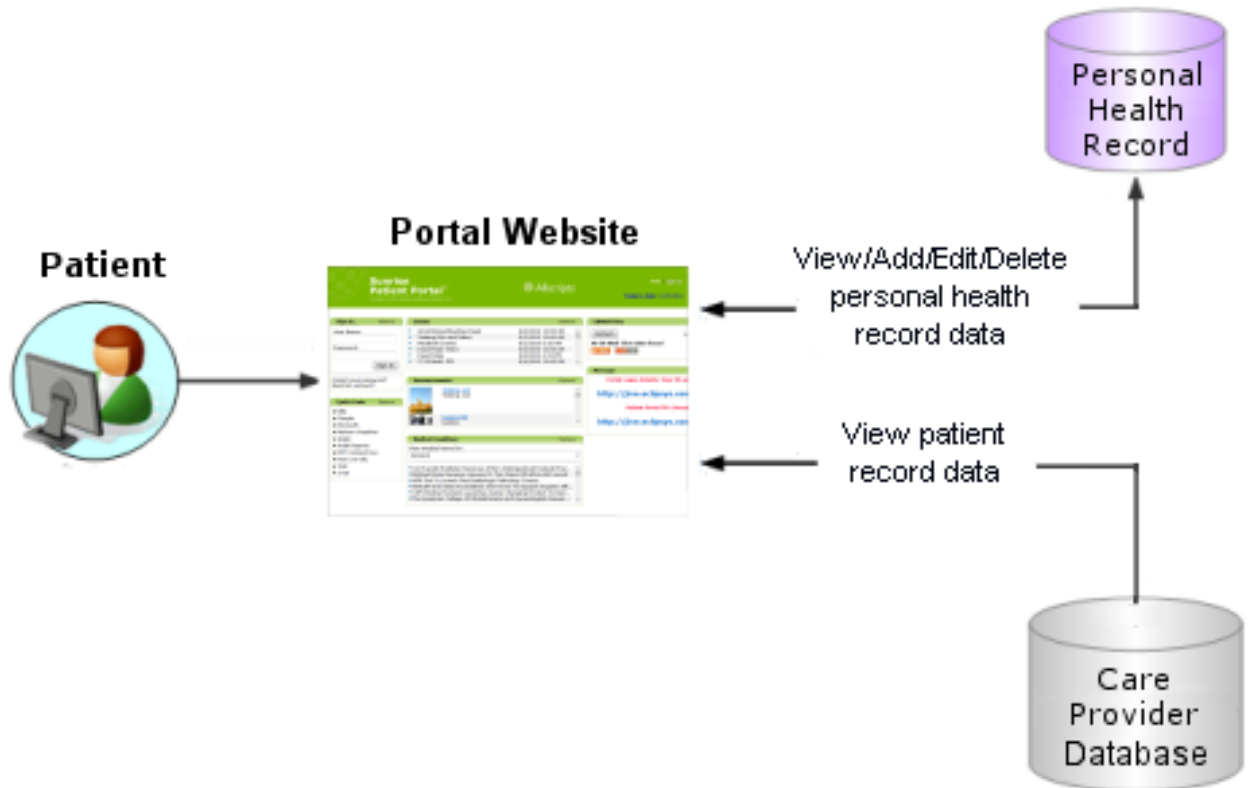
Welcome to Sunrise Patient Portal

Welcome to the online Help for Sunrise Patient Portal™. Sunrise Patient Portal™ is a Web portal that gives you the ability to manage your health care online. Use Sunrise Patient Portal™ to securely connect to your medical record with your care provider. You can view your medical information, send messages to your care provider, request appointments, view your medication list, and obtain test results.

If your healthcare organization has integrated Sunrise Patient Portal™ with Microsoft® HealthVault™, you can also use the site to view and update medical information you have stored in a personal health record. A personal health record is an online repository that stores a person's medical information collected from different sources and made available online. Sunrise Patient Portal™ serves as the gateway for accessing and updating the medical information stored in your personal health record.

The image depicts the Sunrise Patient Portal™ data exchange process.

Figure 1: Sunrise Patient Portal data exchange process



If someone has shared their personal health record with you, you can also connect your Sunrise Patient Portal™ account to their personal health record to view, add, and delete information. You cannot however, access the patient record for any person but yourself.

If you have a Secure Health Messaging account, you can access it in Sunrise Patient Portal™. Secure Health Messaging is a web-based messaging system that enables you to securely communicate with your care provider.

Each web part in Sunrise Patient Portal™ has online Help that provides information on how to use the features of the web part.

Related concept information

Accessing Your Health Information on page 15

Accessing online Help on page 23

Frequently Asked Questions

This page provides you with answers to some commonly asked questions.

What is Sunrise Patient Portal?

Sunrise Patient Portal™ is a web portal that gives you the ability to manage your healthcare online. Through Sunrise Patient Portal™ you can view and update personal medical information you have stored in a personal health record. You can also use Sunrise Patient Portal™ to access personal medical information stored in your healthcare provider's records. It is important to note however, information that is stored in your healthcare provider's records can only be viewed, and not updated.

How do I create a Sunrise Patient Portal account?

To create a Sunrise Patient Portal™ account, click **Need an account** on the Sunrise Patient Portal™ home page. After you enter all the required registration information, click **Create**. Your new account is created, and depending on the configuration of Sunrise Patient Portal™ at your healthcare organization, you might be given the option to either connect to their records, or your personal health record. When your account creation process is finished, you can activate your account by following the instructions included in the automatic email that is sent to the email address you registered with.

What is a personal health record?

A personal health record is an online repository that stores a person's medical information collected from different sources and made available online. Sunrise Patient Portal™ serves as a gateway for accessing and updating the medical information stored in your personal health record. There are several benefits of linking your Microsoft® HealthVault™ personal health record to your Sunrise Patient Portal™ account.

- > Manage your health-related information.
- > Consolidate information that might be scattered across the many doctor's offices and hospitals you visit.
- > Valuable in the case of a medical emergency.

How do I know my information is secure?

Sunrise Patient Portal™ uses role-based security and advanced information safeguards to protect all patient information. Encryption, password protection, the ability to track every user, and other safeguards protect against unauthorized access to information.

Can I give someone else access to my health record?

If you have shared your personal health record with someone, and they have a Sunrise Patient Portal™ account, they can connect to your personal health record with Sunrise Patient Portal™ and view and update information stored in your personal health record. Likewise, if someone has shared their personal health record with you, you can connect to it through Sunrise Patient Portal™ to view and update their information. You cannot, however, share the information that is stored in your healthcare provider's records with anyone else. Similarly, you cannot view another person's information stored in their healthcare provider's records.

Why can't I connect to my care provider's system?

When Sunrise Patient Portal™ attempts to connect to your care provider's system, it matches your Sunrise Patient Portal™ registration information with the personal information stored in your patient record in your care provider's system. The information must match identically and includes last name, first name, date of birth, email address, and primary phone number. If the information in your Sunrise Patient Portal™ account doesn't match the information in your patient record, you can use the **Preferences** page to change your registration information. If you still have problems connecting to your care provider's system, contact your care provider.

Can I update the information in my care provider's system?

No. Sunrise Patient Portal™ can only be used to view the information in your patient record. If you find that the information in your patient record is inaccurate, contact your care provider.

Log on to Sunrise Patient Portal

Before you begin

To log on to Sunrise Patient Portal™, you need an account username and password. If you do not have a Sunrise Patient Portal™ account, click the **Need an account** link on the logon page and follow the instructions that are displayed.

1. For **User Name**, enter your Sunrise Patient Portal™ username.
2. For **Password**, enter your Sunrise Patient Portal™ password.
3. Click Sign In.

Note: If you exceed the maximum number of incorrect login attempts (configured by your healthcare provider), your account will be locked. If your account is locked, you must wait the designated amount of time specified by your healthcare provider until your account can be reactivated.

Results of this task

You are logged on and the Sunrise Patient Portal™ home page is displayed.

What to do next

To log off of Sunrise Clinician Portal™, click **Sign Out** in the upper right corner of the site.

Log on to Sunrise Patient Portal

Navigating Sunrise Patient Portal

Sunrise Patient Portal™ is comprised of a series of pages, each represented by a tab in the toolbar of the site. To go to a page, click the tab in the toolbar. When you go to a page, the page title becomes highlighted in the site toolbar.

Retired data

Depending on your enterprise's configuration, a message indicating that older data is not available might be displayed on the Sunrise Patient Portal homepage. To access older information, contact your physician's office or hospital.

Retired data

Accessing Your Health Information

Using Sunrise Patient Portal™, you can access your patient record from your care provider's system and your health information stored in a personal health record. Use the **Preferences** page to connect and disconnect from your healthcare organization's system or your personal health record

Related concept information

Welcome to Sunrise Patient Portal on page 5

Connecting to your patient record in your healthcare organization's system

When you attempt to connect to your patient record in your healthcare organization's system, Sunrise Patient Portal™ searches your healthcare organization's system for patient records matching your credentials. The credentials that the search is based upon are last name, first name, date of birth, email address, and primary phone number. Therefore, it is important that the credentials in your Sunrise Patient Portal™ account are identical to the credentials stored in your patient record.

|| **Note:** If your credentials do not match, you can change them in the Profile section on the **Preferences** page.

When your matching record is found, it is connected to your Sunrise Patient Portal™ account and the information in your patient record is displayed in Sunrise Patient Portal™. It is important to remember, although you can view the information stored in your patient record, you cannot update the information.

Connecting to your personal health record

When you attempt to connect your Sunrise Patient Portal™ account to your personal health record, you are automatically redirected to the website that hosts your personal health record. Follow the instructions the website provides to connect to your personal health record. After your Sunrise Patient Portal™ account is connected to your personal health record, you are able to view, add, update, and delete information stored in it. You can also copy information stored in your patient record to your personal health record. To do this, your Sunrise Patient Portal™ account must be connected to both your patient record and your personal health record.

Connecting to multiple personal health records

If someone has shared a personal health record with you, you can connect their personal health record to your Sunrise Patient Portal™ account. You can then view, add, edit, and delete the information stored in the shared personal health record.

When there are multiple personal health records connected to your Sunrise Patient Portal™ account, the Patient Header contains a drop-down selection box to select the person whose personal health record you want to work with. When you select a patient, their personal information is displayed in the Patient Header and you can work with the data in their personal health record.

Disconnecting from a data source

When you disconnect from a data source, it is no longer available as a source from where to retrieve information. Also, the information from the data source is no longer available in Sunrise Patient Portal™. After you disconnect from a data source, an email is sent to you to notify you of the change to your account.

Viewing the patient header

The patient header is displayed just beneath the list of tabs in Sunrise Patient Portal™. The patient header displays basic information about you including your name, gender, age, and date of birth.

If your Sunrise Patient Portal™ account is connected to multiple personal health records, the patient header has a drop-down list for you select the patient whose personal health record information you want to work with. When you select a patient, their information is displayed in the Patient Header and you can view, update, or delete information from their personal health record.

Note: You cannot change the information in the Patient Header using Sunrise Patient Portal™. To update your personal information, you must contact your healthcare provider.

Viewing the patient header

Web Parts

Web parts are the basic building blocks of Sunrise Patient Portal™ which combined hold all the data accessed through the application and the available interactions on this data. Each web part is an individual widget that displays its own specific content. All web parts include set of controls you can use to modify the content and layout of the web part. A Sunrise Patient Portal™ page can consist of a single main web part or it can contain several web parts.

Minimizing and Restoring Web Parts

Web parts in Sunrise Patient Portal™ can be minimized and restored on the page at your convenience. When you minimize a web part, the information in the web part is hidden. Only the title of the web part remains visible.

To minimize a web part, click the **Options** menu of the web part you want to minimize and select **Minimize**.

To restore a web part, click the **Options** menu of the web part you want to restore and select **Restore**.

Related reference information

[Using the Options Menu](#) on page 21

Using the Options Menu

The **Options** menu is located in the upper right hand corner of most web parts. It is used to control certain functions for the web part. These functions include:

- > Launching the web-part specific online help
- > Minimizing and restoring web parts
- > Printing from certain web parts

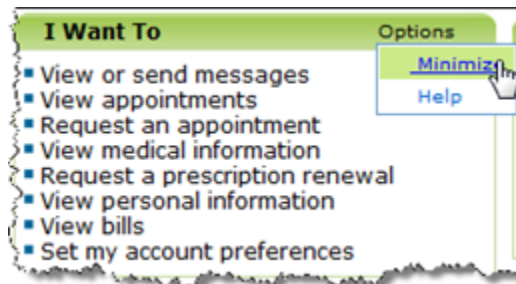
Note: If your healthcare provider has added custom web parts to Sunrise Patient Portal™, an options menu might not be present in such web parts.

Browser Differences

Depending on which browser you use to access Sunrise Patient Portal™, the **Options** menu is displayed differently.

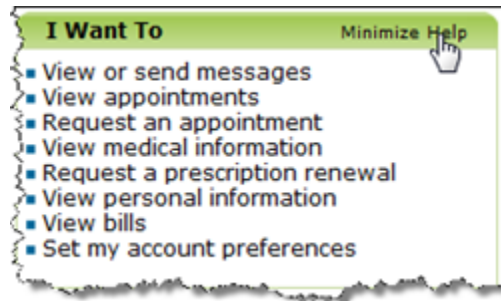
Internet Explorer

In Internet Explorer®, the **Options** menu is displayed as a drop-down menu where you can select a command, as depicted in the following image.



Firefox and Safari

In Mozilla Firefox® and Safari® browsers, no drop-down menu is displayed; instead the commands are displayed in the top right corner of each web part, as depicted in the following image.



Related concept information

Accessing online Help on page 23

Related task information

Printing in Sunrise Patient Portal on page 25

Related reference information

Minimizing and Restoring Web Parts on page 19

Accessing online Help

Sunrise Patient Portal™ offers two types of online Help: general Help and web part Help.

General Help

The general Help offers basic information about using Sunrise Patient Portal™. It can be accessed by clicking the **Help** link in the top right-hand corner of the Web site.

Web Part Help

Web part Help provides information specific to the functions of the individual web part. Depending on the web part, the online help is accessed either directly from the web part titlebar or from the web part's **Options** menu.

Related concept information

Welcome to Sunrise Patient Portal on page 5

Related reference information

Using the Options Menu on page 21

Printing in Sunrise Patient Portal

Before you begin

You must have a printer connected (either locally or networked) to your computer to print from Sunrise Clinician Portal™.

Printing from the web parts and windows will ensure that the information is printed correctly and legibly.

1. Click the **Options** menu and select **Print**.
File Download is displayed.
2. Click **Open**.
PDF print preview is displayed.
3. Click **Print**.
Print Options is displayed.
4. Select your print options and click **Print**.
File Download is displayed.
5. Close **PDF print preview**.

Related reference information

Using the Options Menu on page 21

Working with reports

CCD Audit Detail Report

The CCD Audit Detail Report tells you how many times you have viewed, downloaded, or transmitted a Continuity of Care document (CCD) over a specified period of time.

CCD is a type of document designed to enable the exchange of key clinical information among care providers to improve patient care. CCDs pull information from your medical record and structure it in a standardized way. That information can then be exchanged between health care systems and care providers. By having access to your latest CCD documents, you can easily provide any care provider with your most recent health information on file.

The CCD Audit Detail Report is useful in helping you understand how you have used continuity of care documents to work with and share your medical information. The report lists the name of each continuity of care document you either viewed, downloaded, or transmitted during a time period, along with the date and time of each occurrence.

Generate the CCD Audit Detail report

Optional short description

Before you begin

To generate the CCD Audit Detail report, you must specify a time period over which to collect data. After the report is generated, it is displayed in the **Report Viewer** at the bottom of **Report Console**. The **Report Viewer** contains a toolbar that provides you with navigation, zooming, searching, downloading, and printing functionality.

1. Click the **Preferences** tab.
2. Click **Reports**.
The **Report Console** opens.
3. For **Report Types**, select **CCD Audit Detail Report**.
4. Use **From Date** and **To Date** to specify a time frame for the report to collect data.
5. Click **Generate Report**.

Results of this task

The report is generated and displayed in the **Report Viewer** at the bottom of **Report Console**.

Navigating the report

To navigate the report, use the paging controls on the **Report Viewer** toolbar to move forward and backwards through the report.

Adjusting the Zoom

The zoom feature enables you to magnify or reduce your view of the report. To zoom in or out of a report, select a zoom scale from the zoom drop-down list on the **Report Viewer** toolbar.

Search the report

You can search the report based on keywords you specify. Search results matching your keywords are highlighted in the report.

1. On the **Report Viewer** toolbar, enter search keywords in the search box.
2. Click **Find**.

The **Report Viewer** highlights the matching search results in the report.

3. Click **Next** to find the next matching search result.

Download the report

You can download a report to save it to your local computer. Reports can be downloaded in several formats: Microsoft® Excel® spreadsheets, PDF documents, and Microsoft® Word® documents.

1. On the **Report Viewer** toolbar, click the download icon and select a format from the drop-down list.

File Download is displayed.

2. Click **Save**.


File Download is displayed.

3. Enter a name and specify a location for the report to be downloaded.
4. Click **Save**

The report is exported in your selected format.

Print the report

If your machine is connected to a printer, you can print a hard copy of the report.

1. From the **Report Viewer** toolbar, click .
Print opens.
2. Select the print options and then click **OK**.

Results of this task

The report is printed.

Index

C

Continuity of Care document **27**
 Audit Detail Report **27**

G

General Help **23**
 access **23**

H

health information **15**
 access **15**

O

online Help **23**
 access **23**
 open **23**

P

patient header **17**
 view **17**
personal health record **16**
 connect **16**

R

report **28–29**
 print **29**
 search **28**
retired data **13**

S

Sunrise Patient Portal **9**
 log on **9**

W

web part **19**
 minimize **19**
 restore **19**
Web Part Help **23**
 access **23**
web parts **19**

Z

zoom feature **28**
 adjust **28**
 configure **28**

