Altera
DIGITAL HEALTH

Sunrise™ CarePath

Patient Reference Guide

LOGO PLACEHOLDER

[Your Organization Name]

[Patient support phone / email / portal help URL]

Before You Give This Guide to Patients

This document is a customizable template. It explains every feature in Sunrise™ CarePath in plain language so your patients can get the most out of the portal. Before you distribute it:

1. Replace the bracketed placeholders (organization name, logo, support contact) with your own information.
2. Confirm which self-service features your organization has turned on — self-scheduling, rescheduling, appointment cancellation, and online bill pay all vary by configuration. Remove any steps that don't apply to your patients.
3. Delete this page before printing or publishing the guide for patients.
4. Keep the Sunrise™ CarePath name and Altera Digital Health attribution intact, per your license agreement.

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Welcome to Sunrise™ CarePath

Sunrise CarePath is your online patient portal from [Your Organization Name]. It puts your health information in one place and gives you a direct line to your care team — whenever it's convenient for you.

With CarePath, you can:

- Send secure messages to your care team
- View and manage your appointments
- Track your medications and request refills
- Review your health summary — allergies, conditions, immunizations, results, vitals, and more
- View and pay your bills
- Complete forms your provider assigns you
- New: View documents sent by your care team
- Manage notification and privacy preferences

Getting Started

Step 1: Download and Register

When you're invited to CarePath, you'll receive an email from [Your Organization Name] with instructions to register. You have 14 days from the date of that email to complete registration — after that, contact us for a new invitation.

1. **Download the app.** Tap the Install Sunrise CarePath link in your invitation email. It opens the Apple App Store or Google Play, depending on your device — download and open the app.
2. **Start registration.** Tap the CarePath registration link in the same email, then select “No account? Create one.”

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3. **Verify your email.** Enter your email address (this becomes your username). A verification code is sent to that email — enter it to confirm.
4. **Set your password.** Create and confirm a password, then tap Next.
5. **Verify your phone.** Text message verification is recommended: enter your mobile number and enter the code you receive by text. You can choose email verification instead if you prefer.
6. **Enter your invitation code.** Enter the code from your invitation email, then review and accept the Privacy Policy and Terms of Use. You get 5 attempts — after that, you'll need to contact us for help.
7. **You're in.** Once your code is verified, registration is complete and you're taken to the CarePath home screen.

Step 2: Log In

1. Open the Sunrise CarePath app.
2. Enter your registered email and password.
3. Verify your identity with a text code sent to your mobile number.
4. Enter the code — you're logged in.

Reinstalling the App

Already registered and need to reinstall? Contact [Your Organization Name] or look for a QR code on our website to get back to the registration link.

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Getting Around CarePath

The home screen gives you quick access to everything in CarePath:

- Messages, Appointments, Medications, and Health Summary tiles for your most-used features
- An upcoming appointment card showing your next visit's date, time, clinician, and location
- Badge notifications — a small orange circle — that flag new or unread items like messages, results, or forms
- A menu (tap the three lines in the top-left corner) for quick access to every feature
- If you manage a family member's care, a patient selector lets you switch between your own information and theirs

> **Accessibility:** CarePath supports your device's accessibility settings, including larger text (up to 200%), high contrast mode, and zoom.

Messages

Use Messages to send and receive secure notes with your care team.

- **New message —** Compose a message

From the home screen, select Messages > New Message, fill in the recipient, subject, and message, then select Send Message.

- **Reply —** Reply to a message

Open a message from your Inbox and select Reply All.

- **Delete —** Delete a message

Open the message and select the trash icon. Deleted messages can be restored from the Deleted tab.

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- **Attachments —** Add an attachment

Select the paperclip icon when composing a message. Attachments are limited to 4 MB per message.

Appointments

Use Appointments to view, schedule, reschedule, or cancel your visits.

- View upcoming or past appointments — select Appointments from the home screen; use the PAST tab for visit history.
- Schedule an appointment — select Schedule Appointment, choose the visit type and provider, then pick a date and time.
- Reschedule or cancel — open the appointment and select Reschedule or Cancel Appointment.

> **Note:** Self-scheduling, rescheduling, and cancellation are only available if [Your Organization Name] has turned these features on. If you don't see these options, contact our office directly to make changes.

Medications

Use Medications to keep track of what you're taking and request refills.

- View active and inactive medications, including dose, frequency, and start date.
- View medication details, including quantity, prescribing provider, and status.
- Request a refill directly from the medication details screen, or use the refill icon next to a listed medication — add a note for your provider and submit.

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Health Summary

Health Summary brings together your key health information in one place.

Allergies

View known allergies, intolerances, and adverse events.

Conditions

View active and inactive conditions on file.

Documents

View, download, and share your health documents, including records migrated from previous systems. Only clinical documents (C-CDA) can be shared with another provider.

Immunizations

View your immunization history.

Results

View test results, including externally generated PDF results from outside labs or imaging.

Medications

View active, inactive, and all medications in one list.

Vitals

View your most recent blood pressure, heart rate, height, weight, BMI, temperature, oxygen saturation, and more.

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Health Maintenance

View completed and upcoming preventive care — screenings and checkups — with last performed and due dates. Overdue items are flagged.

Billing

Select Bills from the home screen to view a list of your bills, then select View/Pay on any bill to pay it through [Your Organization Name]'s billing system.

> **Note:** Billing access depends on your organization's financial setup — not every patient will see this tile.

More Features

Forms

Complete forms your provider assigns you, at your own pace — progress saves automatically. Find them under More > Forms.

Authorized Users

See who has access to your information, including their status and any expiration date. To remove someone's access, select the trash icon next to their name. To add an authorized user, contact our office.

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Restriction Requests

Choose what health information you'd prefer not to share outside [Your Organization Name]. You can request, update, or check the status of a restriction at any time.

C-CDA History

See a record of who has viewed, downloaded, or transmitted your clinical documents.

User Preferences

Turn email or SMS notifications on or off, and choose your preferred unit of measurement (metric or imperial) for vitals.

Getting Help

Turning On Notifications

Device	Steps
iPhone	Go to Settings > CarePath > Notifications, and enable the settings you want.
Android	Notification settings vary by device — look for “Turn notifications on” in your device's app settings.

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Questions About Your Account

[Your Organization Name] Patient Support

[Phone number]

[Email address]

[Portal help page URL]

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