

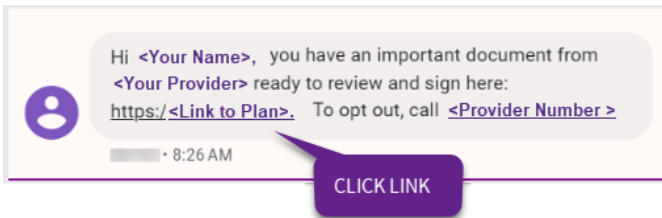
Review Your Treatment Plan

After creating a treatment plan with your provider, they'll text or email you a copy of the plan to review. Select from options in the document to **Agree** that the plan reflects what was discussed or **Decline** if the plan requires changes.

1. Click the document link

You will receive either a text or an email message from your provider's office with a link to access a copy of your treatment plan.

Click the link to get started.



2. Verify that you can review

In the Welcome screen that opens, enter your **Last Name** and **Date of Birth** in MM-DD-YYYY format.

Note: If reviewing on behalf of the client, such as a dependent, enter their last name and date of birth.

Click **Submit** to continue.

Note: You don't need to sign into in to the patient portal or have portal access to view this page or the pages that follow.

3. Tell us who's reviewing

On the next page:

- Select **I am <CLIENT'S NAME>** if you're the client, **- OR -**
- Select **I am reviewing and attesting on behalf of <CLIENT'S NAME>**.

4. Review and Agree or Decline

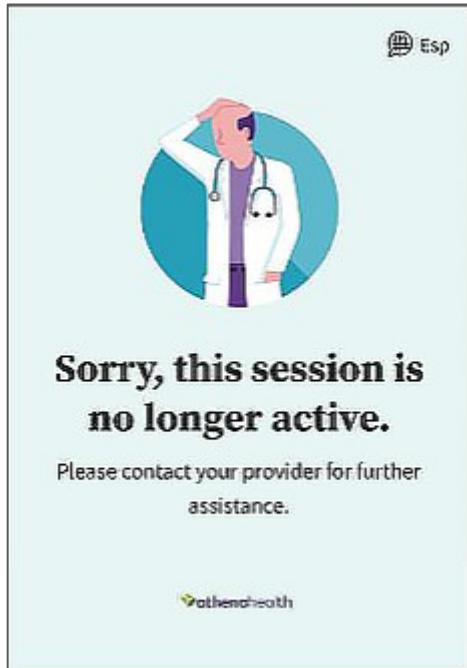
A copy of the treatment plan opens. Scroll through the plan to verify that it reflects what was discussed. Read the legal statement beneath the plan and then select options to **Agree** or **Decline**.

- Select **Agree** if the plan accurately reflects what was discussed. Enter your full name as a signature.
- Select **Decline** if the plan requires changes. You are not required to enter your name as a signature if you decline. Your provider will contact you to determine the changes needed or will discuss changes with you in your next session.

Click **Submit**.

Session no longer active

If you attempt to access a request to review a treatment plan and see a **Session No Longer Active** error message, your provider has withdrawn the request.



This occurs if the provider needs to make additional changes to the plan after sending a request to review. You can disregard the current request; your provider will send you a new request when the plan is ready.