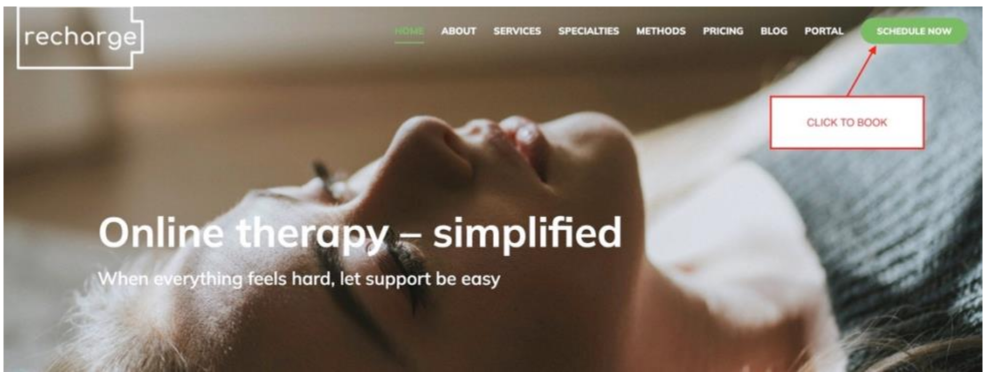
CLIENT INSTRUCTIONS

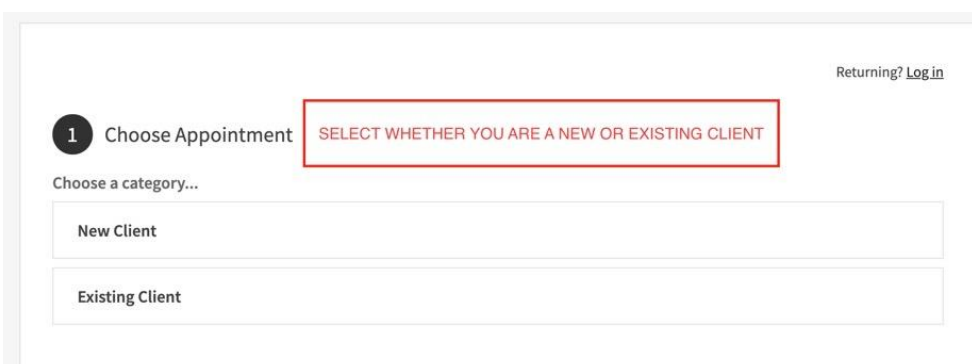
This document will guide you through: 1) the scheduling process, 2) managing appointments, 3) the client portal, 4) communicating with your therapist and 5) internet and system/software requirements. It is useful for new clients and on an ongoing basis for common questions and concerns. For further assistance, contact us at info@rechargeonlinetherapy.com.

SCHEDULING YOUR APPOINTMENT (STEP BY STEP)

1. Go to our website https://rechargeonlinetherapy.com and click “Schedule Now.” (See image below)



2. Click “New Client” or “Existing Client” under “Choose Appointment.” (See image below)
   - New clients have not previously booked session(s) with us and need to fill out onboarding paperwork. Existing clients have booked one or more session(s) with us and do not need to fill out onboarding paperwork.
   - You will only book as a new client once.



3. Select a session type.
   - New clients have the following 3 options:
     - Message Session - First Appointment/Assessment
       - Click this if you never had a session with us and want to begin with a message session.
     - Video Session - First Appointment/Assessment
       - Click this if you never had a session with us and want to begin with a video session.
     - Matching Session - First Appointment/Consultation

        - Click this if you never had a session with us and want to begin with a matching session (consultation).
    - Existing clients have the following 4 options:
        - Message Session Follow-Up Appointment
            - Click this if you had at least 1 message or video session with us and want to continue with a message session.
        - Video Session Follow-Up Appointment
            - Click this if you had at least 1 message or video session with us and want to continue with a video session.
        - Message Session - First Appointment/Assessment (Following Matching Session*)
            - Click this if you just had a matching session with us and want your first session with your assigned therapist to be a message session. You will only click this one time.
            - *Alternatively, you were seeing a therapist at Recharge Online Therapy and are transferring to a new therapist at Recharge Online Therapy.
        - Video Session - First Appointment/Assessment (Following Matching Session*)
            - Click this if you just had a matching session with us and want your first session with your assigned therapist to be a video session. You will only click this one time.
            - *Alternatively, you just had a message session with us and your therapist requested further assessment.
            - *Alternatively, you were seeing a therapist at Recharge Online Therapy and are transferring to a new therapist at Recharge Online Therapy.
4. Select a therapist.
5. Select the session day, date and time you would like.
    - When you hover over the time you want, you will get three options ("Continue," "Add a Time" and "Recurring"). To book one session at a time, click, "Continue." "Add a Time" and "Recurring" are for follow-ups only.
        - For more information about "Add a Time" and "Recurring" see the following section titled "Scheduling Details."
6. Confirm your selections.
7. Fill out "Your Information" in its entirety.
8. Click "Complete Appointment."
    - You will be redirected to a confirmation page with your appointment details.
9. Look out for a confirmation email with subject, "New Appointment."
    - <u>This appointment confirmation email is the only way to manage your appointment(s).</u>
        - For more information about managing your appointment go to the section titled "Managing Your Appointment (Changes and Cancellations)."
10. For existing clients, the scheduling process ends here. For new clients, the scheduling process continues with steps 11-13.
11. If you are a new client, look out for a second email with a link to the client portal so you can access your onboarding paperwork (24 hours after booking).
    - Alternatively, you can enter the client portal directly on our website (top menu) so you can access your onboarding paperwork (24 hours after booking).
12. If you are a new client, fill out your onboarding paperwork.
    - <u>Onboarding paperwork must be completed before your first session.</u>
13. If you are a new client, familiarize yourself with the client portal (where sessions take place) to prepare for your appointment.

SCHEDULING DETAILS

Scheduling Multiple Sessions in One Booking (For Follow-Ups <u>Only</u>) (Optional)

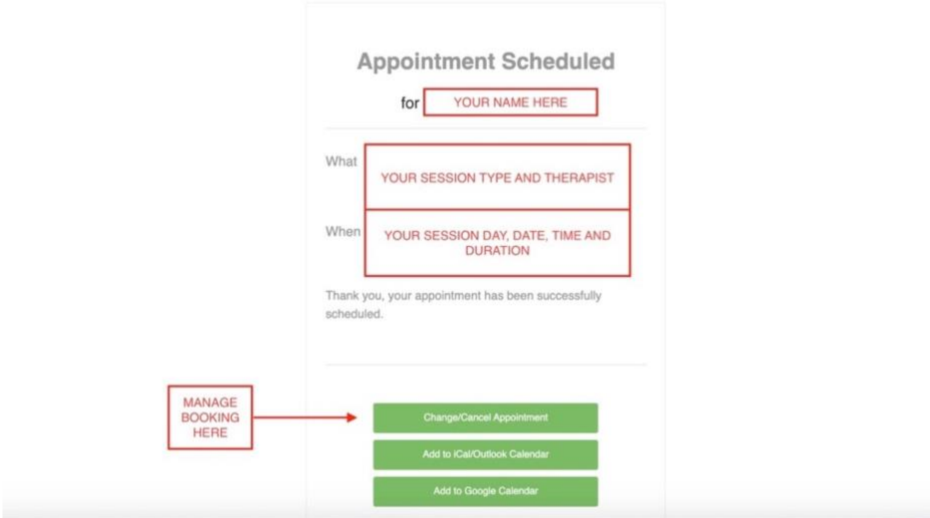
If you are scheduling a follow-up session and your therapist has availability, you can schedule multiple sessions of the same session type (i.e., multiple message sessions) in one booking with **“Add a Time”** without having to pre-pay. (See image below)

Scheduling Recurring Sessions in One Booking (For Follow-Ups Only) (Recommended)

If you are scheduling a follow-up session and your therapist has availability, you can schedule recurring sessions in one booking with **“Recurring.”** Recurring sessions are sessions occurring on the same day/time each week. Recurring sessions help you hold your session day/time to ensure availability without having to pre-pay. We recommend that you schedule recurring sessions and do so as far out as three months. (See image below)

MANAGING YOUR APPOINTMENT (CHANGES/CANCELLATIONS)

To manage your appointment, go into your email account and find your appointment confirmation email (email with subject, “New Appointment”). You received this email when you scheduled your session. Click the button titled “Change/Cancel Appointment” directly in your appointment confirmation email. All changes and cancellations must be made at least 48 hours before your session starts using your appointment confirmation email. (See image below)



THE CLIENT PORTAL

Uses of the Client Portal

- To fill out/e-sign your onboarding paperwork
- To access your billing invoices, statements and superbills (if requested)
- To access your session(s)

Accessing the Client Portal as a New Client

Within 24 hours of booking your first appointment, you will receive an email with a one-time link to the portal (email with subject, "Welcome to Client Portal"). At that time, you will be able to use this link and/or the step-by-step instructions below to enter the portal.

If you did not receive the welcome email and/or cannot access the portal, it may be because it has not been 24 hours since you booked your first appointment. For more information go to the section titled "Troubleshooting the Client Portal."

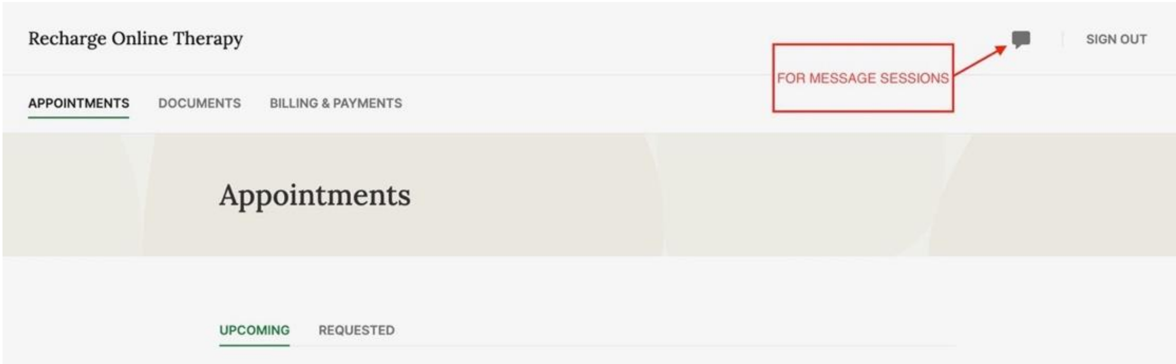
If it has been 24 +hours and you cannot access the portal, contact us.

Entering the Portal with Instant Sign In (Step by Step):

1. Click "Portal" on the top menu of our website.
   - You will be redirected to https://rechargeonlinetherapy.clientsecure.me.
2. Select "I'm an Existing Client" (new and existing clients).
3. Enter your email address and click "Email Me a Link."
   - You must use the same email address you gave us when you scheduled your first appointment every time you log in.
4. Look out for an email that includes a one-time link to your session and click "Sign In."
   - The email should arrive instantly. If not, ensure you used the right email address.
5. You have successfully entered the portal. Once signed in, you should see a screen with the tabs, "Appointment," "Documents," "Billing and Payments."
6. Repeat steps 1-5 to enter the portal before beginning each session.

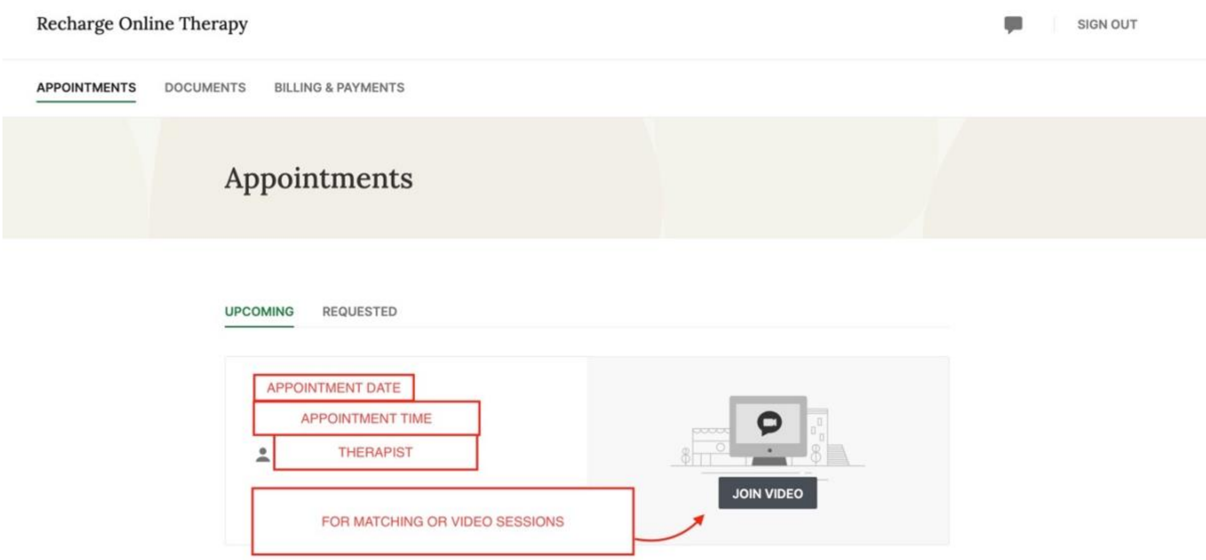
Beginning Message Sessions:

- Enter the client portal using the aforementioned steps.
- Access your secure message sessions by clicking the message icon on upper right corner of your screen. (See image below)



Beginning Video Sessions (Matching or Video) (On Computer):

- Enter the client portal using the aforementioned steps.
- Once you are in the portal, ensure you are in the "Appointments" tab and click "Upcoming."
- Click "Join Video" on the right side of your screen to access your secure matching or video session. (See image below)
  - Enter your name and click, "Join Video Appointment."
  - Note: You may be asked to allow "video.simplepractice.com" to use your camera and microphone; if so, click "Allow." If you have disabled pop-ups, enable them.



Beginning Video Sessions (Matching or Video) (On Phone/Tablet):

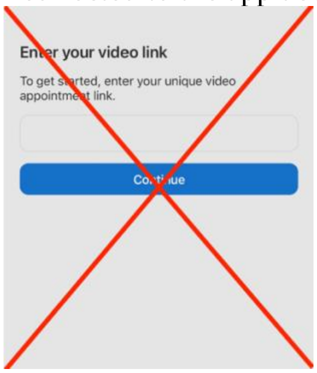
- Enter the client portal using the aforementioned steps.
  - <u>Do not attempt to enter the portal directly through the "Telehealth by Simple Practice" app.</u>
- Once you are in the portal, click, "Menu" on the top right corner followed by "Appointments."
- Click "Join Video" to access your secure matching or video session.
  - Enter your name and click "Join Appointment Now."
  - Note: You may be asked to download an app titled "Telehealth by Simple Practice." Download it and allow the app to access your camera and microphone when prompted.
    - <u>Again, once downloaded, do not attempt to enter future sessions directly through the app.</u>

Troubleshooting the Client Portal

If you are unable to access/enter the client portal, consider the following common issues:

- Our system does not recognize you yet. To access the client portal, you must wait up to 24 hours after booking your first appointment.
- You are using a different email address to log in. <u>You must use the same email address you gave us when you scheduled your first appointment every time you log in.</u>

- You are using a link that has expired. All links you receive via email are one-time links. Return to our website, click “Portal” and get a new one-time link.
- You are attempting to begin your session directly from the “Telehealth by Simple Practice” app on your phone/tablet. If you are in the app and being prompted to enter your video link, you are not beginning your session correctly. We do not provide video links. To begin your session, click “Portal” on the top menu of our website and you will be redirected to the app accordingly. (See image below)



COMMUNICATING WITH YOUR THERAPIST

To communicate between sessions, you must contact your therapist using their company email address <u>only</u>; you can expect a response during their normal work days and hours. Your therapist’s company email address and work schedule can be found on our website (About > Our Team). For more information, see *Policies and Informed Consent*, section “Communication Procedures, Therapist Availability Between Session(s) and Emergency Procedures.”

REASON FOR CONTACT	**PROCEDURE**
Session-Related Administrative Reasons (running late etc.)	Email therapist at company email **only**
Clinical Reasons (question after session, etc.) ***<u>Not</u> recommended – discuss in next session or book a session ASAP***	Email therapist at company email **only**
To Manage (Change/Cancel) Appointment ***Do <u>not</u> contact your therapist***	Appointment confirmation email **only**
Emergencies ***Do <u>not</u> contact your therapist or us***	○ Call 911 or visit emergency room ○ Other hotlines in *Policies and Informed Consent*, section “Communication Procedures, Therapist Availability and Emergency Procedures”
*Although we have implemented measures to make email secure and HIPAA compliant, it is never guaranteed.	

INTERNET, SYSTEM AND SOFTWARE REQUIREMENTS

REQUIREMENTS	
Internet	○ Reliable, high-speed internet connection with a bandwidth above 10-15 mbps (recommended) ○ Enable cookies on browser ○ <u>Supported:</u> Google Chrome, Mozilla Firefox, Apple Safari and Microsoft Edge ○ <u>Not Supported</u>: Internet Explorer

System/Software	○ Device purchased no more than 2 years ago (recommended) ○ Mobile/Tablet: Latest version of system/software (iOS 13; Android 7.0) ○ Computer: A 2.5 GHz processor and 4 GB of RAM (minimum). Apple/Windows: Latest version of system/software (i.e., Big Sur, Catalina, Mojave/Windows 11, 10).