



# Onboarding Checklist

Use this checklist to track your onboarding progress.  
We recommend printing this page for easy reference!

## AFTER YOUR SETUP CALL

- Complete the patient data import form (if necessary)
- Complete the payer enrollment form (if you're on the Fusion billing plan)
- Complete application for payment processing (if you're on the Fusion billing plan)

## SETTING UP YOUR CLINIC

- Set Clinic Options
- Add any additional locations
- Add users (if you're on the multi-user plan)
- Add referring physicians
- Add payers
- Add / Edit billing codes and set charge amounts
- Reserve NPIs
- Create your document header
- Import standardized tests
- Import HEP material (if you have the Home Education Platform add-on)

## ADDING YOUR PATIENTS

- Add your patients into Fusion (skip if you completed the patient data import)
- Link referring physicians
- Add diagnosis codes
- Set last assessment dates
- Link payers
- Add prior authorizations
- Set up your patient portal
- If you're a therapist, check out the *Success Guide for Therapists* in the *Get Started* section to learn about scheduling and documentation.

**Important:** You only need to complete this section if you are on Fusion's Billing plan.

## PREPARING FOR BILLING

- Use the *Success Guide for Billers* located in the *Get Started* section to learn how to bill through Fusion.
- Schedule a time with your Customer Success Manager to submit your first claims together.