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)

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 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
- [ ] If you're a therapist, check out the *Success Guide for Therapists* in the *Get Started* section to learn about scheduling and documentation.

PREPARING FOR BILLING

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

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

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