

REP REFERENCE

Onboarding SOP

Step-by-Step Process: From Signed Agreement to First Billing Cycle

This SOP outlines the complete onboarding process for a new practice partner. Timeline: Target 30 days or less from signed agreement to first patient enrolled.

PHASE 1		Organization Setup	Timeline: Days 1–3	Owner: Rep + FitPeo CSM
1	Intro Call	Schedule a 30-minute strategy call with the practice manager and/or physician. Review program goals, timeline, and key contacts.		
2	Collect Credentials	Gather EMR/EHR login credentials and billing information (NPI, TIN, billing contact). FitPeo needs these for seamless integration.		
3	Sign Agreement	Confirm revenue-sharing agreement is signed and on file. Send copy to practice.		
4	Assign CSM	FitPeo assigns a dedicated Customer Success Manager to the practice. Introduce via email.		

PHASE 2		Program & Device Assignment	Timeline: Days 3–7	Owner: FitPeo CSM + Practice
1	Identify Eligible Patients	Work with practice staff to run a patient list pull for Medicare patients with 2+ chronic conditions (hypertension, diabetes, obesity, COPD, etc.).		
2	Provider Approval	Submit patient list to physician for approval before any outreach begins.		
3	Assign Programs	Map each patient to RPM, CCM, or both based on their conditions and engagement level.		
4	Order Devices	FitPeo ships FDA-approved Bluetooth devices (BP monitor, glucometer, oximeter, scale) directly to patients at no cost.		

PHASE 3 **Provider Training** Timeline: Days 5–10 **Owner: FitPeo CSM**

1	Platform Walkthrough	FitPeo CSM conducts a 60-minute training session on the provider portal — how to view patient data, alerts, and monthly reports.
2	Staff Training	Brief office staff on RPM workflow: what the devices look like, what patients will receive, and who to direct patient questions to.
3	Customize Branding	FitPeo prepares co-branded patient outreach materials (letters, call scripts) using the practice's name and logo.

PHASE 4 **Patient Enrollment & Engagement** Timeline: Days 7–25 **Owner: FitPeo Engagement Team**

1	Patient Outreach	FitPeo's patient engagement team contacts eligible patients by phone, letter, and SMS to explain the program and confirm enrollment.
2	Device Delivery	Enrolled patients receive devices with setup instructions. FitPeo provides onboarding support directly to patients (no practice staff needed).
3	First Data Transmission	FitPeo monitors first readings and confirms devices are active. Alerts practice if any patient needs intervention.
4	Engagement Tracking	CSM monitors compliance — target 16+ readings/month per patient for 99454 billing eligibility.

PHASE 5 **Billing & First Revenue Cycle** Timeline: Days 25–30+ **Owner: FitPeo Billing Team**

1	Claims Preparation	FitPeo coding team prepares claims for all eligible CPT codes based on actual engagement data.
2	Claims Submission	FitPeo submits claims to Medicare on behalf of the practice. Practice does not need to submit anything.
3	Monthly Report	Practice receives a transparent monthly report showing all enrolled patients, codes billed, and revenue generated.
4	Revenue Split	Reimbursement is processed and split per the revenue-sharing agreement. Practice receives payment on agreed schedule.
5	Ongoing Optimization	CSM reviews first billing cycle with practice — adjusts patient list, engagement targets, and program mix as needed.

ONBOARDING CHECKLIST

Quick Reference — Track Progress by Phase

Phase 1	■ Intro call completed ■ EMR/EHR credentials collected ■ Agreement signed ■ CSM assigned and introduced
Phase 2	■ Patient list pulled and reviewed ■ Provider approval obtained ■ Programs assigned per patient ■ Devices ordered
Phase 3	■ Provider portal training completed ■ Staff briefed on RPM workflow ■ Co-branded materials created
Phase 4	■ Patient outreach initiated ■ First devices delivered ■ First data transmissions confirmed ■ Compliance tracking active
Phase 5	■ First claims submitted ■ Monthly report delivered ■ Revenue split processed ■ 30-day review call scheduled

Questions? Contact your FitPeo Customer Success Manager or Practice Revenue Solutions at seefitpeo.com