

101 Provider Credentialing Checklist

Use this comprehensive checklist to ensure smooth provider credentialing, faster payer approvals, and reduced enrollment delays.

Provider Documentation

- ■ Copy of Medical License
- ■ DEA Certificate
- ■ Board Certification (if applicable)
- ■ NPI Confirmation
- ■ State Controlled Substance Registration (if applicable)
- ■ Malpractice Insurance Certificate
- ■ Driver's License or Government ID
- ■ Updated CV (last 5 years explained)
- ■ Work History Verification
- ■ Education & Training Certificates

Practice Information

- ■ Tax ID (EIN) Confirmation Letter
- ■ W-9 Form
- ■ Business License (if required)
- ■ Voided Check for EFT Setup
- ■ Office Address Verification
- ■ Office Phone & Fax Confirmation
- ■ CLIA Certificate (if applicable)
- ■ Collaborative/Supervising Agreement (if required)

CAQH & Online Profiles

- ■ CAQH Profile Created & Attested
- ■ CAQH Documents Uploaded
- ■ CAQH Re-attestation Reminder Set
- ■ PECOS Enrollment (Medicare)
- ■ State Medicaid Portal Enrollment
- ■ Commercial Payer Portal Access

Payer Enrollment Process

- ■ Application Submitted to Medicare

- ■ Application Submitted to Medicaid
- ■ Applications Submitted to Commercial Plans
- ■ Track Submission Dates
- ■ Follow-Up Every 7–14 Days
- ■ Confirm Approval Letters Received
- ■ Effective Dates Documented
- ■ Fee Schedules Requested

Post-Approval Setup

- ■ Billing System Updated with Payer ID
- ■ Test Claims Submitted
- ■ EFT & ERA Confirmed Active
- ■ Verify Network Directory Listing
- ■ Notify Billing Team of Approval

Ongoing Maintenance

- ■ Re-Credentialing Tracking System
- ■ License Renewal Tracking
- ■ DEA Renewal Tracking
- ■ Malpractice Renewal Monitoring
- ■ Quarterly CAQH Re-Attestation