

Credentialing Checklist

A quick guide to what's needed to get your providers credentialed smoothly.

Provider Information & Documents

- ☐ Provider's National Provider Identifier (NPI) number
- ☐ Provider has an active CAQH profile, attested and current (required by most insurance payers before applications can be processed)
- ☐ State medical license(s), active and unexpired
- ☐ DEA registration (if applicable)
- ☐ Board certification(s) and specialty documentation
- ☐ Malpractice insurance certificate (current coverage)
- ☐ CV or professional work history, with no unexplained gaps
- ☐ Copy of diploma(s) and residency/fellowship certificates

Practice Information

- ☐ Practice's Tax ID (EIN) and NPI (Type 2, if applicable)
- ☐ Practice address, phone, and billing address (if different)
- ☐ W-9 form for the practice
- ☐ List of insurance payers the practice wants to apply to

Application Submission

- ☐ Applications are prepared and submitted to each selected payer
- ☐ Proof of submission is provided for each application, including submission date, confirmation/reference number, and contact details of the payer representative
- ☐ Client is notified once each application is submitted

Follow-Up & Tracking

- ☐ Regular follow-ups are conducted with each payer to check application status
- ☐ Client receives status updates without needing to ask
- ☐ Any missing information requested by a payer is addressed promptly

Handling Rejections & Closed Panels

- ☐ If an application is rejected due to an error, it is corrected and resubmitted at no additional cost
- ☐ If a payer rejects an application for reasons outside our control, the client is notified and presented with next steps
- ☐ If a payer's panel is closed, the client is informed and given the choice to wait (up to 6 months) or select a different payer
- ☐ Panel status is monitored and the client is updated if a previously closed panel reopens

Final Approval

- ☐ Provider receives confirmation of approval/enrollment from each payer
- ☐ Effective date of participation is confirmed and shared with the client
- ☐ Provider is added to the payer's active directory (if applicable)

This checklist is provided for general guidance and does not guarantee payer approval. For a full review of your credentialing needs, book a free consultation with our team. Contact us at (904) 663-9070 or contact@healthaxs.com