



PLAN THE WORK. KEEP THE EVIDENCE.

Credentialing checklist

For practice managers and enrollment teams. Use one working set per project; tick completed items or mark N/A with a reason. Requirements vary by payer, state, provider type and facility.

Project / practice: _____

Owner: _____ Review date: _____

01 Define the work

- ☐ **Scope and owner.** List provider types, entities, locations, states and target payers; assign an internal owner.
- ☐ **Application path.** Get each payer or facility's current checklist; confirm initial, update, recredentialing or revalidation work.
- ☐ **Responsibilities.** Identify who supplies records, submits applications, answers requests and checks the final outcome.

02 Reconcile the identifying information

- ☐ **Provider and entity details.** Check legal names, addresses, tax details and NPIs against the applicable records. Keep sensitive numbers off this worksheet.
- ☐ **NPI type.** Confirm individual versus organizational requirements. CMS treats a sole proprietorship as Type 1; do not assume every practice needs both types. [1]
- ☐ **Practice changes.** Flag new clinicians, locations, ownership or entity changes; ask the payer which updates or applications apply.

03 Prepare the supporting records

- ☐ **Qualifications.** Gather the current CV/work history, education, training, licenses and certifications requested by the reviewing organization.
- ☐ **Conditional documents.** Confirm requirements for liability coverage, references, affiliations, disclosures and DEA or other registrations where applicable.
- ☐ **Data consistency.** Resolve missing dates, name differences and expired documents before submission; retain the approved versions.

04 Check shared profiles and access

- ☐ **CAQH, where used.** Review profile data and supporting documents, authorize relevant organizations and complete required attestations. Use current portal instructions. [2]
- ☐ **Program access.** For Medicare, confirm the correct enrollment path and authorized PECOS access. An NPI is not proof of enrollment. [3]
- ☐ **Secure handover.** Use the designated secure channel for records. Do not place patient details, passwords or confidential documents in this checklist.



FROM APPLICATION TO CONFIRMED OUTCOME

Track it through completion

Use your payer's current instructions and keep the source correspondence with the record. This planning aid is not an application or a promise of approval.

01 Track each application

- ☐ **Submission evidence.** Save the submitted version, receipt or reference, date, and the payer/facility contact route.
- ☐ **Follow-up.** Record the latest request, responsible person and next follow-up date. Keep estimates separate from confirmed dates.
- ☐ **Exceptions.** Resolve missing information and record responses; ask about closed panels or eligibility before treating a delay as administrative.

02 Confirm completion and maintain it

- ☐ **Written outcome.** Retain approval or enrollment evidence, participation terms and any applicable effective date; submission alone is not completion.
- ☐ **Team handoff.** Give billing and scheduling staff the confirmed provider, payer, entity and location scope. Resolve uncertain start dates before relying on them.
- ☐ **Maintenance.** Assign owners for license/insurance expirations, CAQH attestations, payer updates and program revalidation. Record each applicable due date.

03 Record the next action

Provider / payer / location reference: _____

Current status and supporting record: _____

Next action / owner / due date: _____

04 Use primary sources

- [1] [CMS: NPI application instructions](#) - individual and organization types.
- [2] [CAQH: Provider Data Portal user guide](#) - profile, authorization and attestation steps.
- [3] [CMS: Medicare Provider Enrollment](#) - application and program guidance.

Sources checked October 8, 2026. Confirm current payer and facility requirements for your situation.

Need help with the work?

Compare credentialing services, scope and support at credentialingreviews.com/compare/. No account is required to build a shortlist.