Well Bill MB LLC

New Practice Credentialing Checklist

A simple order of steps for new practices and newly added providers.

1. Set up the basics

- [ ] Legal entity formed and EIN obtained
- [ ] Group (Type 2) NPI and individual (Type 1) NPI in place
- [ ] Business address, phone and tax details consistent everywhere
- [ ] Business bank account and W-9 ready

2. Gather the provider documents

- [ ] State license (and DEA / controlled-substance registration, if applicable)
- [ ] Board certification, if applicable
- [ ] Education and training records
- [ ] Current malpractice certificate and claims history
- [ ] Work history for recent years, with any gaps explained in writing
- [ ] Current CV and government ID
- [ ] Hospital privileges and references, if required

3. Complete CAQH ProView

- [ ] Profile complete, documents uploaded and not expired
- [ ] Each payer authorized to view the profile
- [ ] Attestation done; re-attest on schedule (CAQH generally asks about every 120 days)

Timelines and requirements vary by payer and by state. Always verify the current requirements with each payer before you apply.

4. Choose payers and apply

- [ ] List the payers your patients use, and prioritize the biggest ones first
- [ ] Medicare: enrollment through PECOS or the correct CMS-855 form
- [ ] Medicaid: enrollment is handled by each state, so check your state's process
- [ ] Commercial plans: submit each payer's application and contract
- [ ] Double-check names, addresses and dates before submitting
- [ ] Signatures and attestations complete; keep a copy of everything

5. Follow up and confirm

- [ ] Follow up on a schedule (for example every 2 to 3 weeks)
- [ ] Write down the date, the person and the reference number for each call
- [ ] Confirm the **effective date** in writing for each payer
- [ ] Do not schedule payer patients until the effective date is confirmed

6. Keep it current

- [ ] Track re-credentialing and CAQH re-attestation dates
- [ ] Update every payer and CAQH when you move or add a location

Simple tracker

Payer	Submitted	Follow-up	Status	Effective date

Want a free, no-obligation look at your credentialing setup?
Well Bill MB LLC • (217) 340-1771 • wellbillmb@gmail.com • wellbillmb.com