

A WORKING CHECKLIST

Credentialing & enrollment readiness.

Use one record for each provider, payer, entity and location arrangement. Keep application milestones separate from confirmed effective approval.

01 / Define the arrangement

- ☐ Confirm the provider, legal entity, location and relevant payer product.
- ☐ Check identifiers and demographic details against authoritative records.
- ☐ Assign an accountable owner for the application and follow-up.

02 / Prepare the record

- ☐ Collect the payer's current required documents and instructions.
- ☐ Check document currency and completeness before submission.
- ☐ Record the submission reference and where evidence is retained.

03 / Confirm the milestones

- ☐ Track receipt, review, additional information and approval separately.
- ☐ Obtain the relevant effective-date confirmation and scope of approval.
- ☐ Check that confirmed details match the billing system setup.

04 / Plan ongoing maintenance

- ☐ Record revalidation, renewal and expiring-document follow-ups.
- ☐ Assign ownership for demographic and practice-location changes.
- ☐ Keep unresolved requirements visible before billing begins.

One decision to carry forward

Action: _____

Owner: _____ Review date: _____

Use and adapt with your team. Keep completed account-level records in your organization's approved systems. These prompts do not replace current payer, program or internal requirements.