



# Enrollment Application Checklist

Process is your greatest control point when enrolling providers with the many payer organizations in your network. Checklists help to ensure you have everything you need — the first time — and that when one step is complete, you know exactly what to do next.

## Gather Training and Education

- ☐ Practitioner degree (MD, DO, DPM), post-graduate education or training
- ☐ Details of medical or professional education and training
- ☐ Completion of residency program in the designated specialty

## Gather Licensing and Certification

- ☐ Current license or certification in the state(s) in which the care provider will be practicing (no temporary licenses)
- ☐ National Provider Identification (NPI) number
- ☐ Specialty (surgeons need board certification, RNs don't need anything else)
- ☐ Active Drug Enforcement Agency (DEA) number and/or Controlled Dangerous Substance (CDS)
- ☐ Certificate or acceptable substitute (if required)
- ☐ Medicare/Medicaid participation eligibility or certification (if applicable)

## Gather Work History Details

- ☐ Five-year work history. If there are any gaps longer than six months, please explain
- ☐ Statement of work limitations, license history and sanctions (only required if you are applying to join UnitedHealthcare's Medicare and Medicaid plans)
- ☐ W-9 form
- ☐ Hospital staff privileges

# Enrollment Application Checklist (cont.)

## Gather Payer-Specific Requirements

- ☐ Active errors and omissions (malpractice) insurance or a state-approved alternative
- ☐ Malpractice history
- ☐ Special needs survey
- ☐ LOI
- ☐ Disclosure of ownership statement
- ☐ Other credentialing requirements such as AMA profile or criminal history review as required by credentialing authorities
- ☐ Notification if this provider has ever been a delegated provider prior to this credentialing application
- ☐ Complete credentialing application in portal

## Following Application Submission

- ☐ Check application 1 wk
- ☐ Check application 2 wk
- ☐ Obtain credentialing approval via portal





# Post-Payer Decision Checklist

Here's a general enrollment checklist. You'll likely need to create a checklist for each payer since each has different enrollment requirements.

## Payer Decision: Approval

- ☐ Obtain approval date and note in provider files
- ☐ Identify and log credentialing date
- ☐ Ensure provider is tied to all locations where services are rendered
- ☐ Store approval letter
- ☐ Start submitting claims

## Payer Decision: Denial

- ☐ Identify reason for denial
- ☐ Decide if you'll appeal denial
- ☐ Identify timeframe to resubmit application
- ☐ Ensure all provider documents are up to date

## Payer Decision: Rejection

- ☐ Identify reason for rejection
- ☐ Business process in place if denial was due to an exclusion, sanction, or malpractice
- ☐ Ensure rejection documentation is stored with provider's data
- ☐ Follow a standard process for informing provider
- ☐ Determine how to fill the business/networking adequacy gap (if applicable)

# Kickstart Your Enrollments With MedTrainer Credentialing Software

MedTrainer Credentialing Software keeps all the information you need in one, user-friendly place with proven workflows, customizable dashboards, one-click reporting, and automated reminders to keep tasks on track.

## Enrollment Applications Dashboard



- Quickly assess and improve your enrollment process with dynamic graphs that show application age, average time to complete applications, and number of closed applications per credentialer.

## Built-In Automation



- Keep the enrollment process moving forward with automated reminders for providers to send documents, notification of recredentialing deadlines, and license expiration.

## Highly Customizable Reports



- With all credentialing data in one place, it is easy to customize reports for monthly payer submissions and so you can stay on top of due dates and status. Save reports for easy access, and schedule them to send via email to both internal and external recipients.

## CAQH Profile Management



- Streamline your enrollment processes with the most up-to-date provider information at your fingertips. Save time and improve provider onboarding and recredentialing with CAQH profile management.

## Application Workflow Management



- Simplify enrollment processing with a customized workflow, status, process checklist, notes, and task assignments. Easily assign multiple enrollments to staff, update statuses and prioritize.

**Start saving time with MedTrainer**

**Download the credentialing reality check worksheet for leverage to see the true cost of a manual process**

[See How It Works](#)

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