Credentialing documents checklist

What a commercial payer is likely to ask for · record the expiration date and where each item is stored · requirements vary by payer, provider type and state

Supa
HEYSUPA.COM

Clinician	Individual NPI	Practice / group	Date prepared

DOCUMENTS AND INFORMATION

	DOCUMENT OR INFORMATION	WHY IT MAY BE NEEDED	EXPIRES	WHERE IT IS STORED
☐	**Individual NPI**	Identifies the individual clinician		
☐	**Organizational NPI, if applicable**	Identifies the group or eligible business entity		
☐	**Current professional license**	Verifies authority to practice		
☐	**License history or additional state licenses**	Supports multi-state credentialing, where relevant		
☐	**Education and training details**	Verifies qualifications		
☐	**Board certification, if applicable**	Supports specialty verification		
☐	**Work history**	Supports review of professional background		
☐	**Malpractice or liability certificate**	Confirms coverage details		
☐	**Claims history and required disclosures**	Supports credentialing review		
☐	**CAQH profile and attestation**	Provides centralized professional information		
☐	**Tax identification details**	Supports contracting and payment setup		
☐	**W-9 or other tax form, as requested**	Verifies tax reporting information		
☐	**Practice address and contact details**	Identifies where services are provided		
☐	**Group ownership or organizational information**	Supports group contracting, when required		
☐	**EFT and payment information**	Supports payment setup after approval		

PRACTICE AND TAX INFORMATION

Prepare these alongside the clinician's own documents.

- ☐ Legal business name
- ☐ Tax identification number (EIN or other required identifier)
- ☐ Individual and organizational NPIs, as applicable
- ☐ Practice and mailing addresses
- ☐ Billing and administrative contacts
- ☐ Ownership or organizational details when requested
- ☐ Service locations
- ☐ Telehealth information, where applicable
- ☐ Tax documentation requested by the payer
- ☐ Banking and EFT details for payment setup

CROSS-CHECK BEFORE YOU SUBMIT

Most avoidable delays are mismatches, not missing documents.

Legal name	Identical on the license, the malpractice certificate, the W-9 and the NPI record.
Practice address	The application, the CAQH profile and the NPI record agree.
Tax ID	Matches the entity that will appear on the contract and on claims.
Coverage dates	Liability coverage is current through the expected review period.

USE THIS AS A PREPARATION LIST, NOT A GUARANTEE

The exact requirements depend on the payer, the professional category and the practice arrangement. A group's tax ID and organizational NPI do not replace the individual clinician's qualifications or credentialing requirements, so prepare both levels for a group application.

> **Expiration dates are the column that pays off.** A license or liability certificate that lapses mid-review restarts work that was already done. Fill the Expires column even for documents that are current today.

Supa: insurance credentialing guide, heysupa.com/blog/insurance-credentialing · CAQH attestation guide, heysupa.com/blog/caqh-attestation