Credentialing submission tracker

A practical California working record - editable in Word

USE IT THIS WAY	DO NOT MISTAKE IT FOR THIS
Use for each payer or enrollment channel from the first submission through confirmed effective status.	This cannot establish enrollment, network status, effective date, or authority to bill.

Working record

Prepared by	
Reference (no names)	
Date opened	
Next review date	

Six review points

1	**[ ] Define the exact enrollment target** Record payer, product, network, location, tax entity, rendering provider, and requested effective date. **Your record:** _____ **Source:** CMS: provider enrollment
2	**[ ] Inventory submitted facts** List applications, attestations, licenses, insurance, education, work history, ownership, and banking materials. **Your record:** _____ **Source:** CMS: provider enrollment
3	**[ ] Record every transmission** Keep date, channel, confirmation, reference number, and a copy of what was sent. **Your record:** _____ **Source:** HHS: Security Rule guidance
4	**[ ] Track deficiencies and corrections** Record the request, source, due date, response, and resulting status without relying on portal memory. **Your record:** _____ **Source:** CMS: provider enrollment

5	**[ ] Separate approval milestones** Distinguish credentialing, contracting, network assignment, directory listing, and billing-effective status. **Your record:** _____ **Source:** CMS: provider enrollment

6	**[ ] Verify before billing** Preserve the written effective status and applicable contract terms used for the first claim. **Your record:** _____ **Source:** CMS: provider enrollment

Close the loop

Decision / next action	
Owner	
Due date	

Controlling sources

- CMS: provider enrollment
- HHS: Security Rule guidance

Educational information only. Not legal, clinical, tax, billing, or regulatory advice. Recheck every source before relying on an older saved copy. Do not put client-identifying information in a copy you cannot secure.