Credentialing Onboarding Made Simple: A Step-By-Step Checklist

Everything you need to gather, organize & submit for a smooth onboarding process.

Credentialing can be one of the most time-consuming & stressful parts of onboarding new providers. Missed details often lead to costly delays in reimbursement & compliance issues. This checklist was created by SYNERGEN Health's credentialing experts to help practices, ASC groups & health systems stay organized and compliant.

1 Provider Information

- ☑ Start date
- ☑ Updated NPI (current practice)
- ☑ Valid government ID (driver's license or passport)
- ☑ Visa (if applicable)
- ☑ Proof of name change (if applicable)

2 Licenses & Certifications

- ☑ Current & prior state medical licenses
- ☑ Board certification certificates (or status documents)
- ☑ ATLS, BLS, ACLS, PALS, etc. certifications

3 Education & Work History

- ☑ Education certificates/diplomas
- ☑ Complete educational history (undergrad & professional)
- ☑ Employment history, including explanations for gaps >3 months
- ☑ Current CV (in MM/DD/YYYY format)

4   Insurance & References

- ☑ Malpractice insurance certificate
- ☑ Peer references with current contact information

5   Online Accounts & Access

- ☑ CAQH login credentials username + password sent separately)
- ☑ Medicare I&A account access approval

6   Disclosure & Compliance

- ☑ Completed disclosure questions
- ☑ Archived prior employment & work locations

PRO TIPS

Commonly Missed Items

- City of birth
- Disclosure questions
- Peer references

How SYNERGEN Helps

- Automated reminders
- CAQH management
- Payer follow-up
- Compliance oversight

Credentialing Made Simple

This checklist is just the first step. SYNERGEN Health helps healthcare organizations accelerate credentialing, reduce errors & get providers reimbursed faster.

SYNERGEN Health