MSN Global
Medical Billing & RCM

New Provider Onboarding Checklist

Coordinate credentialing, payer enrollment and billing setup for a provider joining an established medical practice.

Provider Name ________________________________	**Specialty** ________________________________
Start Date ________________________________	**Onboarding Owner** ________________________________

Provider Intake

- ■ Collect demographic, contact and tax information.
- ■ Collect CV, education, training and work-history information.
- ■ Collect current licenses, DEA and certifications.
- ■ Collect malpractice certificate and required disclosures.

Credentialing & Enrollment

- ■ Create or update CAQH profile and attestation.
- ■ Validate NPI and taxonomy information.
- ■ Submit Medicare / Medicaid enrollment changes as applicable.
- ■ Submit commercial payer credentialing / roster requests.
- ■ Track each payer through approval and effective date.

Practice & Billing Setup

- ■ Add provider to EHR / PM system with correct identifiers.
- ■ Configure service locations and rendering / billing relationships.
- ■ Confirm payer-specific billing effective dates before claims are submitted.
- ■ Establish scheduling, authorization and referral workflow.
- ■ Confirm coding, charge capture and documentation expectations.

Go-Live Validation

- ■ Run eligibility / payer participation checks for scheduled patients.
- ■ Confirm claims show correct billing, rendering and service location data.
- ■ Monitor initial claims and remittances for enrollment-related rejections.
- ■ Escalate enrollment discrepancies before they become aged A/R.