

Commercial Payer Enrollment Checklist

Use this checklist to prepare for commercial health plan contracting, credentialing and provider enrollment.

Payer / Plan _____	Provider / Group _____
Application Date _____	Owner _____

Pre-Application

- ☐ Confirm payer is accepting providers for the specialty / geography.
- ☐ Determine whether contracting and credentialing are separate steps.
- ☐ Confirm CAQH profile is complete and recently attested.
- ☐ Prepare W-9, NPI, taxonomy and practice location information.

Credentialing Packet

- ☐ Current licenses and certifications.
- ☐ Malpractice coverage.
- ☐ Education / training and work history.
- ☐ Hospital privileges or admitting arrangement where applicable.
- ☐ Ownership / group information requested by the payer.

Contracting & Enrollment

- ☐ Review participation agreement and fee schedule through appropriate business/legal review.
- ☐ Complete roster or enrollment forms.
- ☐ Set up EFT / ERA and portal access.
- ☐ Record application and contract reference numbers.

Activation

- ☐ Obtain written confirmation of effective date.
- ☐ Verify provider appears in payer directory where applicable.
- ☐ Test eligibility and claim submission.
- ☐ Monitor first remittance for network / enrollment discrepancies.

Administrative resource only. Requirements vary by payer, program, state, specialty and organization. Verify current requirements with the applicable official source before submission. This resource is not legal, tax or clinical advice.