

# **Keep Your Pay Coming in with Expert Credentialing Tracking System**

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# Credentialing Process & Best Practices for Tracking

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# Learning Objectives



Objective 1

Organization is key



Objective 4

Gather supporting documents




Objective 2

Communicating with all parties involved



Objective 5

Properly Initiate the credentialing and tracking process



Objective 3

Properly initiate the credentialing process



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TRACKING CREDENTIALING STATUS

# Organization is key



## Organization is key

**Using a systematic approach to ensuring credentialing is done properly and all the necessary support documents are included:**

- 1 Use a spreadsheet, obtaining all required information needed for submission
- 2 Utilize a credentialing checklist
- 3 Create a folder (manually or electronically) containing supporting documents for the provider
- 4 Document the conversation with insurance representative.



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TRACKING CREDENTIALING STATUS

Communicate updates  
with everyone involved



# Communicate Updates



## Communicate with Providers

Waiting to be contracted with insurance companies can be an anxious process.

## Communicate with Leadership

Reimbursement is a big part of generating revenue. Knowing the credentialing status will help leaders to better forecast their financial.

## Communicate with your Team

When everyone is on the same page, more work can get done to achieve success in credentialing providers.





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IMPROVING CREDENTIALING PROCESS

Properly initiate the  
credentialing process





## Links to verify providers credential

**Using a systematic approach to ensuring credentialing is done properly and all the necessary support documents are included:**

- 1 Complaints or Malpractice -  
<https://www.fsmb.org>
- 2 Verify Board Certification  
<https://www.certificationmatters.org>
- 3 Contact the provider school

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# Common Information Requested to Credential Healthcare Providers

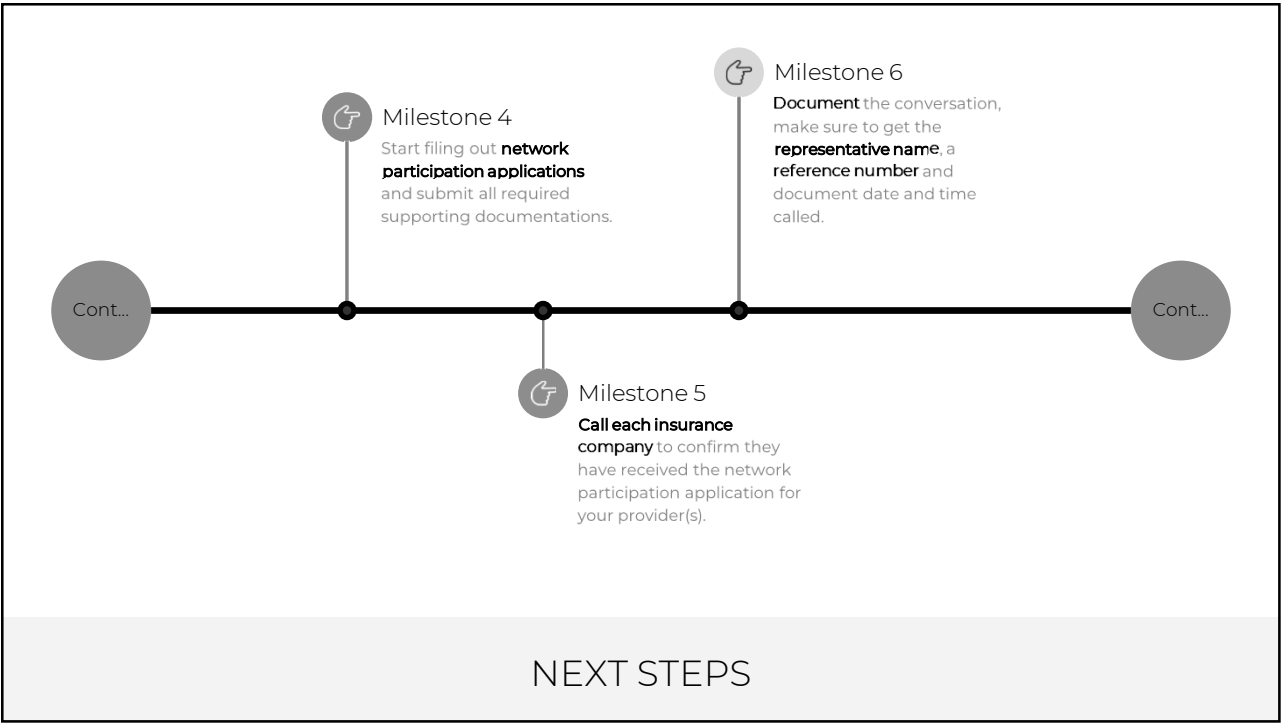
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- Name
- Previous/Other Name
- Gender
- NPI
- Mailing Address (Clinic or Hospital)
- E-mail Address
- Phone Number
- Citizenship Information
- Tax ID Number
- Current CV
- Date of Birth
- Social Security Number
- Education & Training
- Residency
- Licensing (Medical, DEA)
- Board Certifications
- Specialty Certificate
- CAQH Information
- Patient Age Focus
- Languages Spoken



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# Summary



Objective 1

Organization is key



Objective 4

Gather supporting documents



Objective 2

Communicating with all parties involved



Objective 5

Properly Initiate the credentialing and tracking process



Objective 3

Properly initiate the credentialing process









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to hear from  
you.

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