Credentialing Toolkit

Created By Melissa DaSilva, LICSW

Melissa@melissadasilva.com

Introduction

Before attempting to get on an insurance panel, you need to do a few steps first.

1) Register for a National Provider Identifier (NPI) - This is almost like your professional social security number. It will follow you around as long as you are in private practice either as an individual or group provider. It doesn't take long to apply. Go to this website:

https://nppes.cms.hhs.gov/#/

2) Fill out your CAQH – This is your resume that insurance companies will be able access when you want panel with them. Warning: this application takes at least an hour to fill out. They want to know everything about your educational and professional past. Here is the link:

https://proview.caqh.org

3) Document Preparation – I recommend that you purchase these items for your toolkit

- **Large 3 Ring Binder**
- **Tab Dividers**
- **Clear Sheet Protectors (that can be added to the binder)**

Gather together:

- **Copy of your professional license**
- **Copy of your state driver's license**
- **Copy of your liability insurance**
- **W-9**

4) Set up these platforms before applying:

-HIPAA Compliant phone system.

- I use Phone.com

http://www.phone.com/?_tracking_id=10362

- Be sure to state "that your phone line is confidential" and "what to do in an emergency"

- Fax #

- I use efax.com

- Answering service for when you are away. Some insurance companies will require a 24/7 hour phone line in case of emergency issues.

I use Assistanttothetherapist.com (yes, it is my own company, but I think it's great)

-HIPAA complainant email

- I use hushmail.com

5) Decide what insurance panels you want to apply to: You do not have to panel on all of them. They all pay a different reimbursement rate. Do some research.

Warning: insurance companies will not give you all the details about their reimbursements and what they will cover unless you specifically ask them for that information.

- **Ask for your fee schedule**
- **Ask for the provider manual**

6) Letter of intent: many insurance companies will ask you for a letter of intent. Some insurance companies have a form you need to fill out, while others would like one written and sent in the mail or faxed. During your research check to see if this is one of their steps.

Assemble your binder

1. **Make copies of the following pages from step 3 and put them in your binder.**
2. **Place the documents in the sheet protectors and put them towards the front of the binder after the cover sheet.**
3. **Complete the information on the coversheet**
4. **Give each insurance company its own section, using the tab dividers.**
5. **ALWAYS MAKE COPIES OF YOUR APPLICATIONS and save them in this binder.**
6. **Use the phone log to document every call you make to check on your application process. Although all their calls are recorded, it is important to keep your own documentation. Ask the representative for a reference number and document it in your phone log.**
7. **Schedule time in your calendar each week to check on status of your application.**

Coversheet

NPI type 1 (Individual):_____________________________________

NPI type 2 (Group practice) *: _______________________________

EIN **(social security number unless you have a tax ID number)**

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Professional License number: ________________________________

CAQH# ________________________

Rendering Taxonomy (located on your initial paperwork when you completed application for NPI) :

____

Name of Insurance Company ________________________________

Address: ____

Phone Number: ____

Phone Number for Provider Relations Department: _____________

Email for Provider Relations: ________________________________

□ **Letter of Intent**

__________ **Date Sent out**

□ **Application Completed**

___________ **Date Sent out**

Phone Log:

Date:________ Time:

Who did you speak with? __________________________________

Called to address what concern?:____________________________

Outcome of Call:____

____

____

____

____

Follow up need?____

____

Reference number:

____