



# Provider onboarding checklist

Provider onboarding is the foundation of the provider experience. Clear communication and centralized processes are critical.

The provider will have contact with HR, IT, the medical staff office, finance, and revenue cycle teams to gather much of the same data. Well-organized organizations can reduce the number of times a provider is asked for the same information by coordinating efforts.

Use our checklist to reduce duplication and help ensure you have all the necessary information and documents from a new provider.

**Provider name:** \_\_\_\_\_

**Specialty:** \_\_\_\_\_

**Start date:** \_\_\_\_\_

**Department:** \_\_\_\_\_

Document	Date submitted	Notes
Provider application (includes provider release, disclosure questions, and peer references)		
Government-issued photo ID		
CAQH login details		
Staff end-user access for Medicare enrollments (provider to grant access to identified organizational staff)		
CV, including work experience, training, and education with start and end dates (must be in MM/YYYY format) and gaps may require explanation		

Document	Date submitted	Notes
Professional license(s) (or equivalent)		
Current DEA and XDEA (if applicable)		
Current CDS or state prescriptive authority		
All current board certifications (certificates or letters)		
Medical or professional school diploma(s)		
Residency and fellowship certificates		
ECFMG (if applicable)		
Hospital affiliations		
Current certificate of insurance or tort coverage		
Liability history (last 10 years of carriers or coverage)		
Immunization history		
CMEs		
Procedure or case logs		

Organizations may collect additional information based on their state-specific elements, accreditation, policies, or by-laws.



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