

MedStates — LMFT Credentialing Checklist

1. Professional Identification & Licensing

- Active Marriage & Family Therapy license
- Additional state licenses (if applicable)
- Government-issued ID
- SSN or EIN documentation

2. National Provider Identifiers (NPI)

- NPI Type 1 (Individual)
- NPI Type 2 (Group, if applicable)
- Correct taxonomy code for MFT specialty
- NPI linked to correct practice locations

3. Supervision & Training Documentation

- Supervisor attestation(s)
- Summary of supervised clinical hours
- Certificates of completed training
- Graduate transcripts (if required by payer)

4. CAQH Profile Setup or Update

- Fully completed CAQH profile
- Uploaded, current documents
- Up-to-date malpractice insurance
- Attested within the last 120 days

5. Practice Information

- Practice name and physical address
- Mailing and billing addresses
- Practice phone and fax
- W-9 form (current year)

6. Employment & Work History

- Updated CV or résumé
- No unexplained employment gaps
- Prior practice affiliations listed

7. Malpractice Insurance

- Active malpractice policy

- Certificate of Insurance (COI)
- Coverage meets payer standards

8. Background Information

- NPDB self-query (optional but useful)
- Explanation letters for any past actions

9. Group Practice Documentation (If Applicable)

- Group NPI (Type 2)
- EIN / ownership details
- Reassignment forms
- List of practice locations

10. Telehealth & Multi-State Readiness

- Telehealth licensure compliance
- HIPAA-compliant telehealth platform
- Awareness of payer telehealth rules

11. Medicaid / Medicare Items

- Medicaid portal registration
- Medicare PECOS account
- EFT information for payments

12. Optional Extras

- Professional headshot
- Short professional bio
- List of specialties
- Languages spoken

You're Almost Ready!

If you've completed all the items on this checklist, you're ready for your next step.

Send your documents to MedStates — and we'll take care of the entire credentialing process for you.

Email: support@medstates.com
Phone: +1 (929) 621-6059

MedStates — Credentialing Made Simple for Marriage & Family Therapists.