

# MedStates — Mental Health Providers Credentialing Checklist

## 1. Licensure & Identification Documents

- State-issued professional license (LCSW, LMHC, LPCC, LMFT, Psychologist, Psychiatrist, PMHNP, etc.)
- Additional state licenses (if applicable)
- Government-issued ID
- Social Security Number or EIN documentation
- DEA certificate (if prescribing)
- Controlled substance registration (if applicable)

## 2. National Provider Identifiers (NPI)

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

## 3. CAQH ProView Profile

- Completed demographic and practice information
- Up-to-date work history (no unexplained gaps)
- All licenses and certifications uploaded
- Malpractice insurance uploaded
- Attested within last 120 days
- Authorized payer access enabled

## 4. Education, Training & Work History Documents

- Updated CV / résumé (month/year format)
- Graduate transcripts (if required)
- Internship / residency / fellowship documentation
- Supervision letters (LCSW, LPC, LMFT, LMHC)
- Certificates of specialized training

## 5. Malpractice Insurance

- Active malpractice policy
- Certificate of Insurance (COI)
- Meets minimum coverage requirements
- Includes all practice locations

## 6. Practice Information

- Practice name / DBA
- Physical service address(es)
- Mailing & billing address
- Office phone, fax, email
- W-9 form (current year)
- Voided check for EFT setup

#### **7. Group Practice Documentation (If Applicable)**

- Group NPI (Type 2)
- EIN / ownership information
- Provider-to-group reassignment forms
- Collaboration agreements (PMHNP, where required)
- All practice locations listed consistently

#### **8. Telehealth & Multi-State Readiness**

- Telehealth-approved licensure
- HIPAA-compliant telehealth platform
- Awareness of payer telehealth rules
- Compact participation (PSYPACT/others)

#### **9. Medicaid, Medicare & State-Specific Items**

- Medicaid portal registration (PAVE, IMPACT, TMHP, etc.)
- Medicare PECOS account
- EFT banking details
- State background checks (if required)
- County behavioral health applications (CA, WA, CO, etc.)

#### **10. Optional Items (Recommended)**

- Professional headshot
- Biography for provider directories
- Specialty list (CBT, trauma, couples, etc.)
- Languages spoken
- Age groups served

#### **You're Almost Ready!**

If you've gathered all documents listed in this checklist, you're ready for the next step.

**Send your documents to MedStates — and we'll take care of credentialing from start to finish.**

Email: [support@medstates.com](mailto:support@medstates.com)

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MedStates — Credentialing Made Simple for Mental Health Providers.