

Credentialing Packet Checklist

The documents and numbers a payer, hospital, or the CAQH Provider Data Portal typically asks for. Each item links to where I confirmed it; screens and exact requirements change, so check the official page before you submit.

- ☐ NPI (Type 1, individual), obtained through NPPES. There is no fee to apply.
<https://www.cms.gov/files/document/npi-fact-sheet.pdf>

How to apply (three ways, web-based is fastest):

<https://www.cms.gov/medicare/regulations-guidance/administrative-simplification/how-apply>

- ☐ The correct taxonomy code for how you're licensed: 101YP2500X for Professional Counselor, 101YM0800X for Mental Health Counselor, 106H00000X for Marriage & Family Therapist, as applicable to you.
https://www.nucc.org/images/stories/CSV/nucc_taxonomy_261.csv
- ☐ Current Oregon LPC or LMFT license, verifiable through the OBLPCT License Search.
<https://www.oregon.gov/oblpc/Pages/Primary.aspx>
- ☐ Malpractice/professional liability insurance face sheet or certificate, current. Payers commonly refuse one that is about to expire, so renew first if it is close.
<https://www.oregon.gov/oha/HPA/OHIT-ACPCI/Documents/2024-OPCA-Final.pdf>
- ☐ A signed and dated W-9. The Oregon application asks for your tax ID and the name affiliated with it; the W-9 and every claim need to match that pair.
<https://www.oregon.gov/oha/HPA/OHIT-ACPCI/Documents/2024-OPCA-Final.pdf>

About Form W-9:

<https://www.irs.gov/forms-pubs/about-form-w-9>

- ☐ A CV or complete work history. The Oregon application requires an explanation of any gap longer than two months; some payers ask about shorter ones.
<https://www.oregon.gov/oha/HPA/OHIT-ACPCI/Documents/2024-OPCA-Final.pdf>
- ☐ DEA/CSR certificate field marked "not applicable" (most counselors and therapists don't hold one).
<https://www.oregon.gov/oha/HPA/OHIT-ACPCI/Documents/2024-OPCA-Final.pdf>
- ☐ Board certification field marked "not applicable" if you don't hold one.
<https://www.oregon.gov/oha/HPA/OHIT-ACPCI/Documents/2024-OPCA-Final.pdf>
- ☐ Oregon Practitioner Credentialing Application (OPCA), current May 2024 revision, signed, dated, and initialed per page. Send it directly to the hospital or health plan that's requesting it, not to the state.
<https://www.oregon.gov/oha/HPA/OHIT-ACPCI/Documents/2024-OPCA-Final.pdf>
- ☐ CAQH Provider Data Portal (ProView) profile, now operated by DataSpring, created and attested.
<https://www.dataspring.com/resources>
- ☐ For Medicare: a PECOS account (through Identity & Access) or the paper CMS-855I. On the paper form, select "Undefined Non-Physician Practitioner Specialty" and write in MFT or MHC.
<https://www.cms.gov/files/document/marriage-and-family-therapists-and-mental-health-counselors-faq.pdf>

- ☐ For Oregon Medicaid (OHP): the correct OHA/OHP enrollment form for your provider type, individual or organization.

<https://www.oregon.gov/oha/hsd/ohp/pages/provider-enroll.aspx>

Fill in as you go

NPI:

CAQH ID:

License number:

License expires:

Malpractice policy #:

Malpractice policy expires:
