

Behavioral Health Credentialing Checklist

For LPCs, LCSWs, LMFTs, psychologists and PMHNPs · curecloudmed.com

Identity and licensure

- ☐ **State license** — current, unexpired, for every state you treat in
- ☐ **Compact privilege** — PSYPACT or Counseling Compact, if you hold one
- ☐ **NPI type 1** confirmation letter (individual)
- ☐ **NPI type 2** confirmation letter (group, if you employ or contract clinicians)
- ☐ **DEA registration** — PMHNPs and prescribers only, address must match the practice
- ☐ **State controlled substance registration** — where your state issues one

Education and history

- ☐ **Degree certificate** or official transcript
- ☐ **Supervised hours** documentation for your licensure
- ☐ **CV with month and year dates** — no year-only ranges
- ☐ **Written explanation for any gap over 30 days** — the single most common reason a file is returned
- ☐ **Board certification** certificate, where you hold one

Insurance and business

- ☐ **Malpractice certificate** showing limits and effective dates
- ☐ **W-9** in the exact legal name registered to the tax ID
- ☐ **Practice address, billing address and remittance details**
- ☐ **Group tax ID** documentation, for a group practice

CAQH

- ☐ **CAQH ProView profile** complete — every section, not only the required fields
- ☐ **Attested** within the last 120 days
- ☐ **Each payer authorized** to access the profile — completing it is not the same as granting access

☐ **All uploaded documents unexpired**

The 120-day rule. CAQH re-attestation is due every 120 days. If it lapses while an application is in review, the file stalls and nobody notifies you. Put the date in a calendar the day you attest.

Before you file

- ☐ **Confirm who owns the behavioral network** — Optum for UnitedHealthcare, Evernorth for Cigna, Carenton or Magellan for some plans
 - ☐ **Check panel status** for your license type in your county
 - ☐ **Ask in writing whether the payer backdates** to the application date
 - ☐ **Medicare:** LPCs and LMFTs have been able to enroll since 1 January 2024
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Questions, or want us to run the applications for you?

CureCloudMed · 11350 Random Hills Rd, Suite 175A, Fairfax, VA 22030 · +1 571-402-1499

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