

Credentialing Readiness Checklist

For BCBAs opening their own ABA practice and small agencies adding payers. Work top to bottom: each stage unblocks the next.

1. Tick what's done

Anything unticked in Stages 1–3 will stall every payer application.

2. Start payers early

Commercial payers often take 60–120 days once a file is complete.

3. Don't bill early

Approval and a signed contract with an effective date are two different things.

Stage 1 · Entity & identifiers

Week 0–1

- ☐ Business entity formed (LLC, PLLC or corporation as your state allows) and in good standing
Some states require a professional entity for licensed services. Check with your attorney.
- ☐ EIN issued by the IRS; legal name matches the entity filing exactly
- ☐ Business bank account in the entity's name (payers deposit by EFT)
- ☐ Individual (Type 1) NPI for every BCBA / BCaBA who will be credentialed
- ☐ Group (Type 2) NPI for the practice with taxonomy 103K00000X (Behavior Analyst)
Names and addresses in NPPES must match your applications character for character.
- ☐ State behavior analyst license (LBA or equivalent) where your state requires one
- ☐ Business licenses / local registrations your city or county requires

Stage 2 · Document pack

Week 1

- ☐ Professional liability insurance certificate (individual and/or group, limits payers commonly ask for)
- ☐ General liability certificate, if you'll have a clinic or office
- ☐ BACB certification verification for each credentialed analyst
- ☐ Current CV in month/year format; explain any gap longer than 6 months
- ☐ Copy of degree / transcript and state license(s)
- ☐ Signed W-9 in the entity's legal name
- ☐ Service location and mailing address decided (many payers won't credential a P.O. box as a service location)
- ☐ Ownership and managing-employee disclosure details (needed for Medicaid)
- ☐ Voided check or bank letter for EFT enrollment

Stage 3 · CAQH ProView

Week 1–2

- ☐ CAQH profile created for each provider and 100% complete
- ☐ All Stage 2 documents uploaded, with expiration dates entered
- ☐ Practice location(s) entered and linked to the group NPI and tax ID
- ☐ Authorization granted to the payers you're applying to (or to all plans)
- ☐ Profile attested, with a reminder set to re-attest every 120 days

Stage 4 · Medicaid & managed care

Start in parallel with Stage 5

- ☐ Confirmed how your state covers ABA (state plan, waiver, or managed care organizations)
- ☐ State Medicaid provider enrollment submitted for the group and each rendering provider
- ☐ Enrollment with each Medicaid MCO you want to serve (separate applications and contracts)
- ☐ Any state-specific ABA provider requirements met (training, background checks, supervision ratios)
- ☐ Revalidation date noted

Stage 5 · Commercial payers

Week 2 onward

- ☐ Listed the 3–6 payers most common in your area (ask referral sources and local families)
- ☐ Confirmed each panel is open to new ABA providers before applying
- ☐ Gathered any letters of interest or network-need evidence for closed or tight panels
- ☐ Submitted each application and recorded date, method and reference number
- ☐ Follow-up scheduled every 10–14 business days for every open application
- ☐ Out-of-network / single-case-agreement plan for families who arrive before you're in-network

Stage 6 · Contracting & go-live

When approvals arrive

- ☐ Contract and fee schedule reviewed (CPT 97151–97158 rates and units) before signing
- ☐ Fully executed contract and effective date received in writing
- ☐ Provider and group IDs recorded for each payer
- ☐ EFT and ERA enrollment completed for each payer
- ☐ Clearinghouse / practice management system set up and payer IDs added
- ☐ Authorization workflow ready (assessment request, treatment plan, reauth dates)
- ☐ No services billed to a payer before its effective date

- ☐ CAQH re-attestation calendar (every 120 days)
- ☐ License, insurance and BACB certification expirations tracked
- ☐ Recredentialing dates tracked per payer (often every 3 years)
- ☐ Roster updates sent to every payer when a provider joins, leaves or moves

Your payer tracker

Payer	Panel open?	Submitted	Ref #	Last follow-up	Status

Want a second set of eyes? Book a free 15-minute credentialing consult.

We'll look at your checklist, your state and your payer list, and tell you what to do next, whether or not you hire us. Founding clients: CAQH setup plus your first payer application for \$149 (normally \$350). Email readyaba@mail.grokbots.com.

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