Next-Provider Readiness Worksheet

Before adding a provider, identify the practice work and unanswered questions that need responsible review. This worksheet is about operational planning, not assessing an individual candidate.

Planning review date

Practice planning lead role

Operational need - high-level summary only

Proposed activity or support need	Capacity or workflow question	Responsible review role

- ☐ What is the practice trying to improve or make room for?
- ☐ Which scheduling, team-support or workspace question remains unanswered?
- ☐ Who can review existing operational information in approved systems?

What remains uncertain about the proposed scope?

Use high-level practice planning information and responsible roles only. Do not enter provider or candidate names, NPI or license details, personal records, patient or claim information, account details, amounts, credentials, bank information, system links or file paths. Keep supporting records and completed worksheets in approved secure practice systems. Do not upload or return this worksheet through a public website form.

General operational planning aid, not hiring, employment, clinical, legal, financial, coding or payer advice. It does not approve a provider, establish an effective date, determine billing readiness or authorize practice or system changes. No outcome or timing is guaranteed.

Who will review each administrative dependency?

Treat credentialing, enrollment, contracting, effective dates and billing setup as separate review questions. Terms and requirements vary by payer and program. This sheet does not verify any milestone or determine readiness.

Review area	Question still needing confirmation	Qualified review role
Credentialing review		
Enrollment relationship		
Contracting or participation		
Effective-date evidence		
Billing workflow and setup		

- ☐ Who is authorized to review the relevant records or notice outside this worksheet?
- ☐ Is the question about qualifications, an administrative relationship, a date or an operating workflow?
- ☐ What remains unconfirmed, and who can explain it?

Questions do not establish a decision

An unanswered question is not an approval or a rejection. Keep actual records and determinations in approved systems, with the responsible qualified reviewer.

Medicare-scoped background, not an all-payer readiness standard:
CMS provider/supplier enrollment guide - reviewed November 9, 2026

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What needs follow-up review?

Use an internal discussion date, not a payer filing deadline or promised start date. Keep actual determinations with the responsible qualified reviewer outside this worksheet.

Open planning question	Agreed review activity	Responsible role	Next discussion date / status

Status: Question open / Reviewer identified / Awaiting clarification / Review question closed

Closing a question does not certify a provider's readiness.

Illustrative planning example - not a candidate assessment or client case

Question: Who can review whether the proposed activity fits the existing scheduling workflow?
Review activity: Ask the authorized practice operations reviewer to clarify the workflow.
Responsible role: Practice manager.
Status: Question open; discussion date set by the practice.

Which questions remain for qualified review?

Who will bring those questions to the next discussion?

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