



Private Insurance Contracting Documents Checklist



These are the documents you will need to have on hand as you begin your contracts with private insurance companies.

- 1. W-9 form** – Find a fillable PDF version at www.irs.gov/pub/irs-pdf/fw9.pdf.
- 2. Roster of Providers** – This list should include the full legal names of each of your MDs, PAs, and NPs, as well as their medical license number, NPI #, specialty, and hospital privileges.
- 3. Roster of Clinics** – This should include the physical address of each of your clinic sites as well as a “bill to” address where they can send payments.
- 4. Hospital Transfer Agreement** – If your physicians have admitting privileges at any hospitals, list the name of the hospital with their information on the Roster of Providers. Many departments have a Memorandum of Understanding (MOU) with a hospital to admit patients, if necessary.

NOTE: Other documents will be requested by the credentialing department. A list of these can be found in the [job aid “CAQH Required Documents.”](#)