

Provider credential matrix

One row per clinician per state, nine dated credentials per row. Each date is colored on its own, the row shows the next item due and the provider's worst status, and the Matrix sheet puts everyone on one screen.

QUICK START

- 1 **Clear the examples.** Delete the rows on the Providers sheet that start with "Example -", or type over them.
- 2 **One row per provider per state.** License, DEA and CSR on a row belong to the same state. A second state means a second row with the same name.
- 3 **Copy dates from the primary source.** State board lookup, DEA certificate, insurer's certificate, the card itself, the CAQH portal, the medical staff office letter, the payer's notice. Leave a date blank if it does not apply.
- 4 **Review weekly.** The Dashboard counts each credential type by status and lists the next 10 items. Print the Matrix for credentialing committee or a quick team review.

HOW THE DATES ARE WORKED OUT

CAQH re-attest due =last attested + 120 (edit the cycle per provider if needed)

Next due date =IF(COUNT(9 dates)=0,"",MIN(9 dates))
blank dates are ignored

Next item due names the credential whose date equals the minimum

Act-by date =next due date - lead time (30 days if blank)

Overall status Expired / ≤30 / ≤90 / OK from the earliest date, so it is the worst status on the row

COLOR KEY

Expired

Due ≤30 days

Due ≤90 days

OK

Your input

Calculated

Every credential date is colored by its own distance from today; Overall status is the worst one on the row.

THE RULES BEHIND THE COLUMNS

- DataSpring (formerly CAQH) says clinician profiles in its Provider Data Portal (formerly ProView) are maintained on a 120-day attestation cycle. dataspring.com/clinicians
- DEA requires a separate registration in each state where a practitioner handles controlled substances, after state authorization in that state. DEA Diversion Control registration FAQ · deadiversion.usdoj.gov
- DEA practitioner registrations (dispensing or instructing) have a 3-year registration period. 21 CFR 1301.13(e) · ecfr.gov
- License, CSR, board, privileges and payer cycles vary by state, board, facility bylaws and payer contract. Copy the date each one gives you rather than calculating it. Practical advice

FIELD GUIDE: WHAT GOES IN EACH COLUMN

Column	What to enter, and where to find it
PROVIDER	
Provider · Provider type	Name (same spelling on every row); MD, DO, NP, PA and so on.
NPI · Specialty	From NPPES or your roster.
STATE CREDENTIALS	
License state · no. · expiry	From the state board lookup.
DEA no. · DEA expiry	From the DEA registration certificate for that state.
State CSR no. · CSR expiry	Only if the state issues a separate controlled substance registration.
CERTIFICATIONS AND COVER	
Board / specialty · expiry	Certificate end date or the board's next continuing-certification deadline.
Malpractice carrier · Policy no.	From the certificate of insurance or face sheet.
Coverage form	Claims-made or occurrence, as stated on the policy.
Malpractice expiry	Policy expiration date.
Life support · expiry	BLS, ACLS, PALS...; the earlier card if there are two.
ENROLLMENT AND PRIVILEGES	
CAQH ID · last attested	From the DataSpring CAQH Provider Data Portal.
Attest cycle (days)	Blank = 120. Change if the portal shows a different due date.
CAQH re-attest due (calc)	Last attested + cycle.
Hospital / facility · reappointment due	From the medical staff office letter.
Payer(s) · recredentialing due	From the payer notice or portal; earliest if several.
CALCULATED SUMMARY	
Lead time (days)	How long your slowest renewal takes. Blank = 30.
Next item · Next due date (calc)	Which credential is earliest, and its date.
Act-by · Days left · Overall status (calc)	Lead-time-adjusted date, days left, worst status.
Contact · email · file link · notes	Who chases it; the email becomes the reminder address on import.

Verify license status at the issuing board's own lookup, not from a copy. The file cannot send reminders; it changes only when someone opens it.