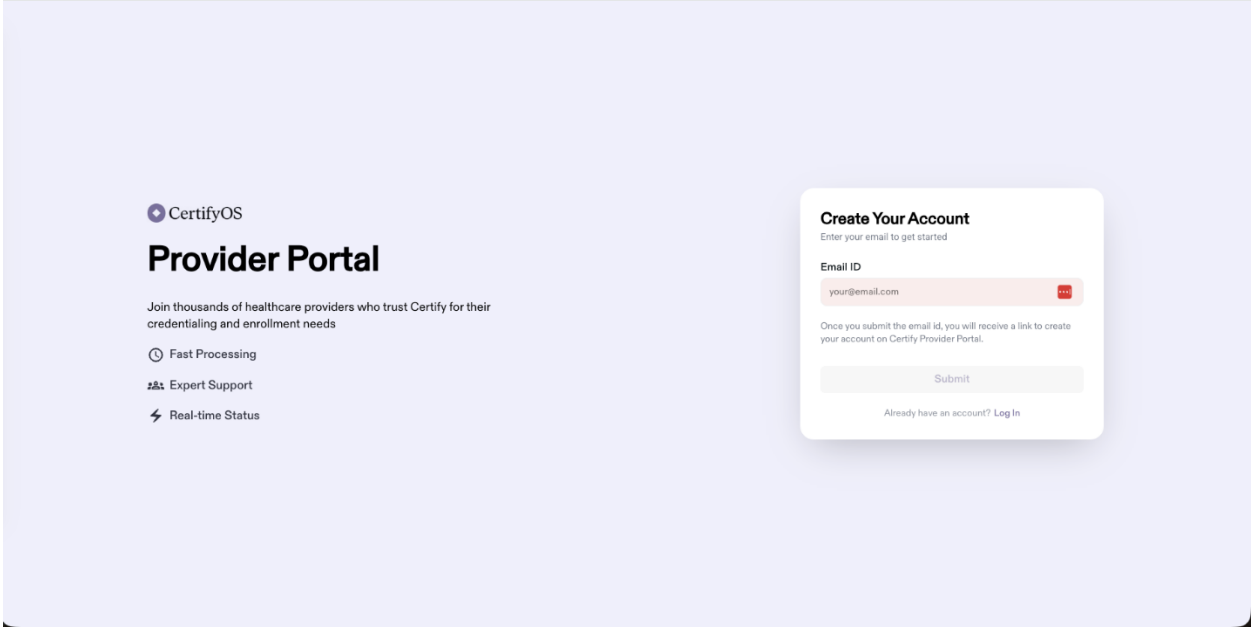
CertifyOS Provider Portal User Guide - Practitioners

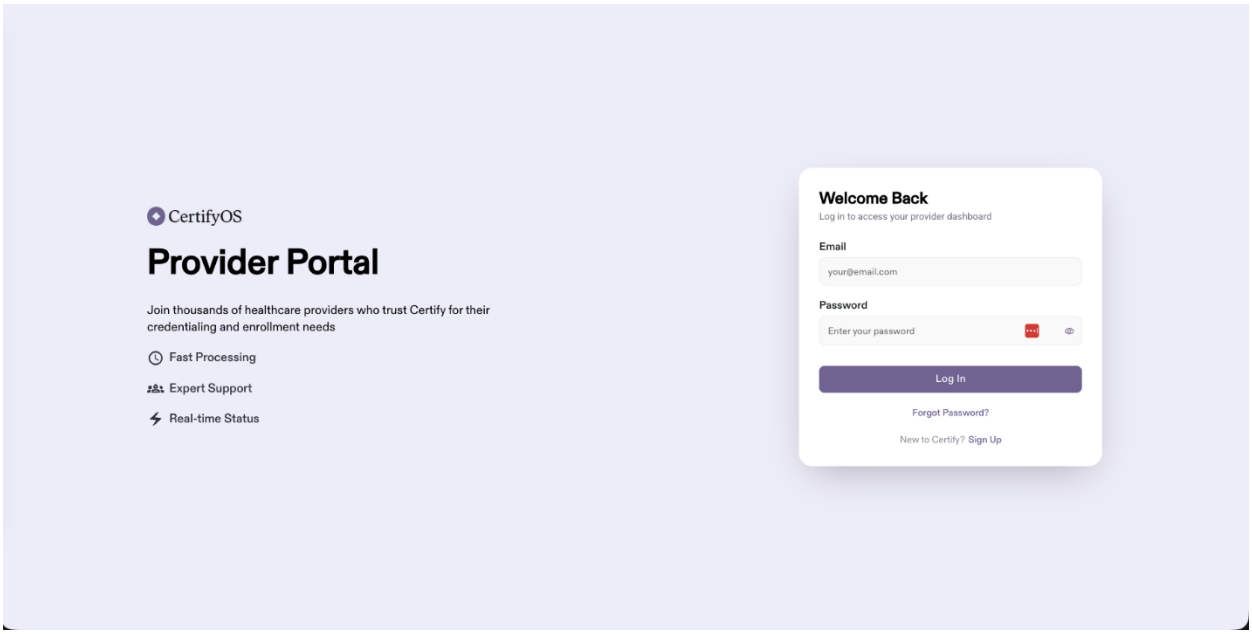
Welcome to the comprehensive, step-by-step onboarding and operational manual for the CertifyOS Provider Portal. This document is designed to guide healthcare practitioners through the complete lifecycle of portal usage—from initial sign-up and dashboard navigation to application submittal, support routing, and profile settings maintenance.

How to create your account and Login?

Step 1: Submit Your Invited Email

1. Navigate to the initial Login Page. Enter your email address and password to Log-In.
2. If you are signing up for the first time, click on ‘Sign Up’ button
3. Type your primary professional email address into the Enter email field.
4. Click the ‘Submit’ button.





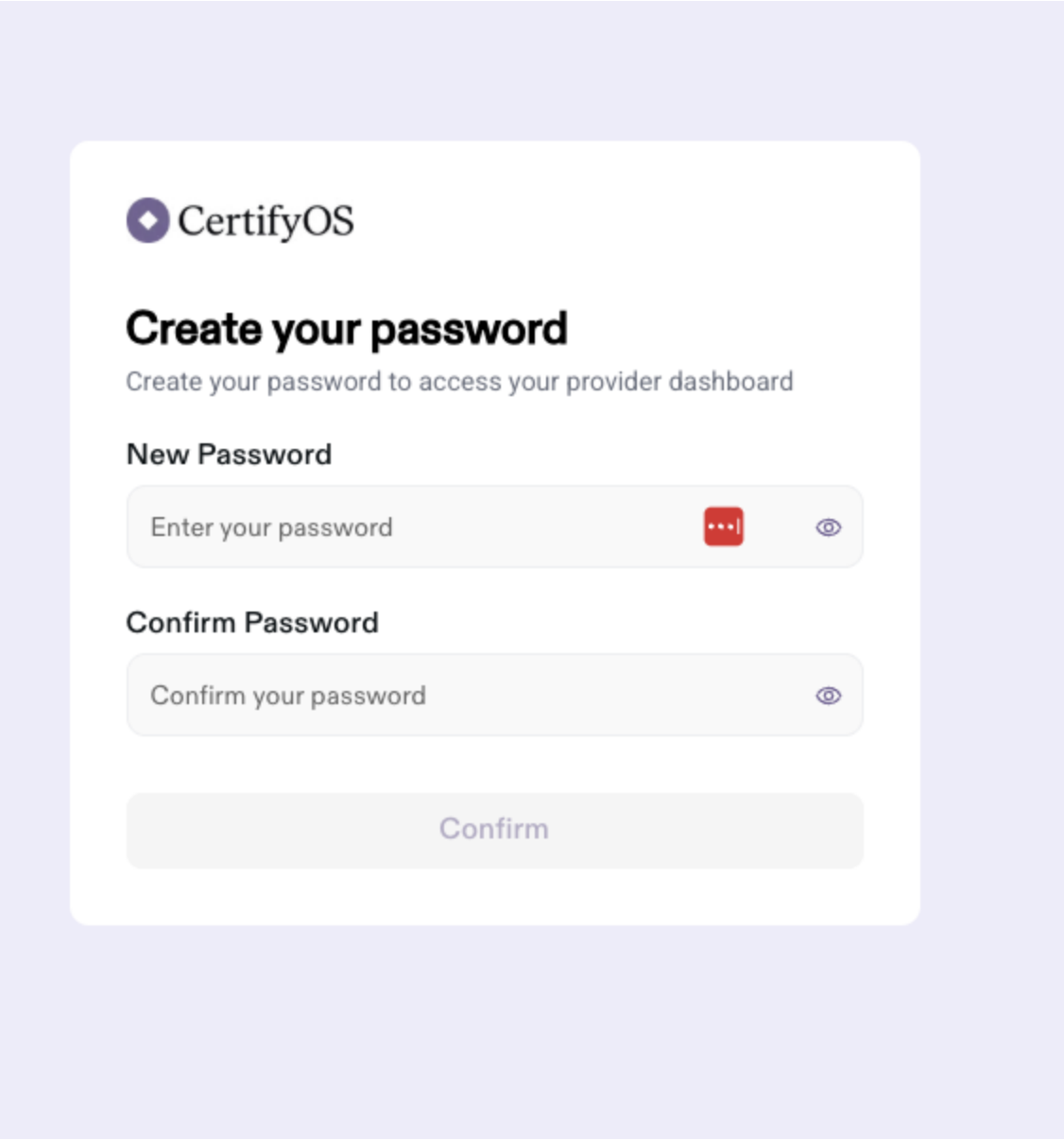
Step 2: Open Your Verification Email

1. Open your email inbox and look for an email with the subject line: **"Complete Your Certify Provider Portal Account Setup"**.

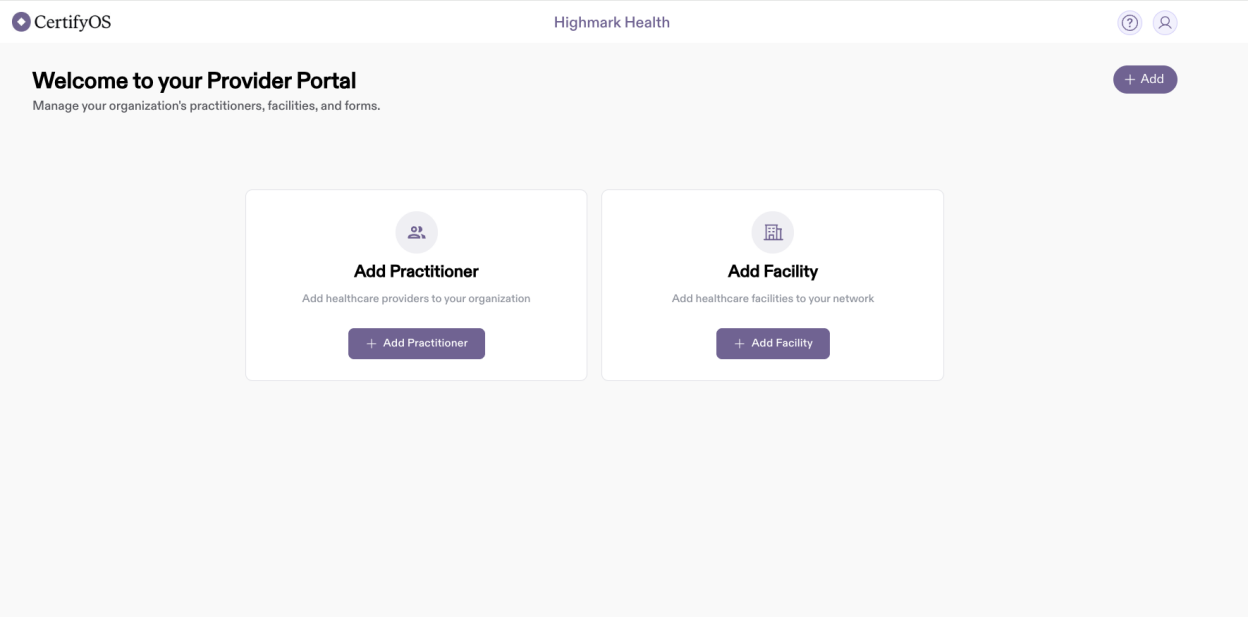
Step 3: Create Your Master Password

Clicking the email link will automatically open the secure ‘Set your Password’ interface.

1. Click into the **New password*** field and type your chosen secure password.
2. Type the exact same password into the **Confirm Password*** field to verify it.
3. Click the **Confirm** button to finalize your registration.



Step 4: Once logged in, the provider home page loads as below



How to submit a credentialing application?

Step 1: Create a practitioner or facility record as required

Upon a successful initial login sequence, users land directly on the Home Page.

- Click on either ‘Add Practitioner’ or ‘Add Facility’
- Enter all required details to add the record
- Once successfully added the record will be listed in the ‘Practitioner’ or ‘Facility’ tab
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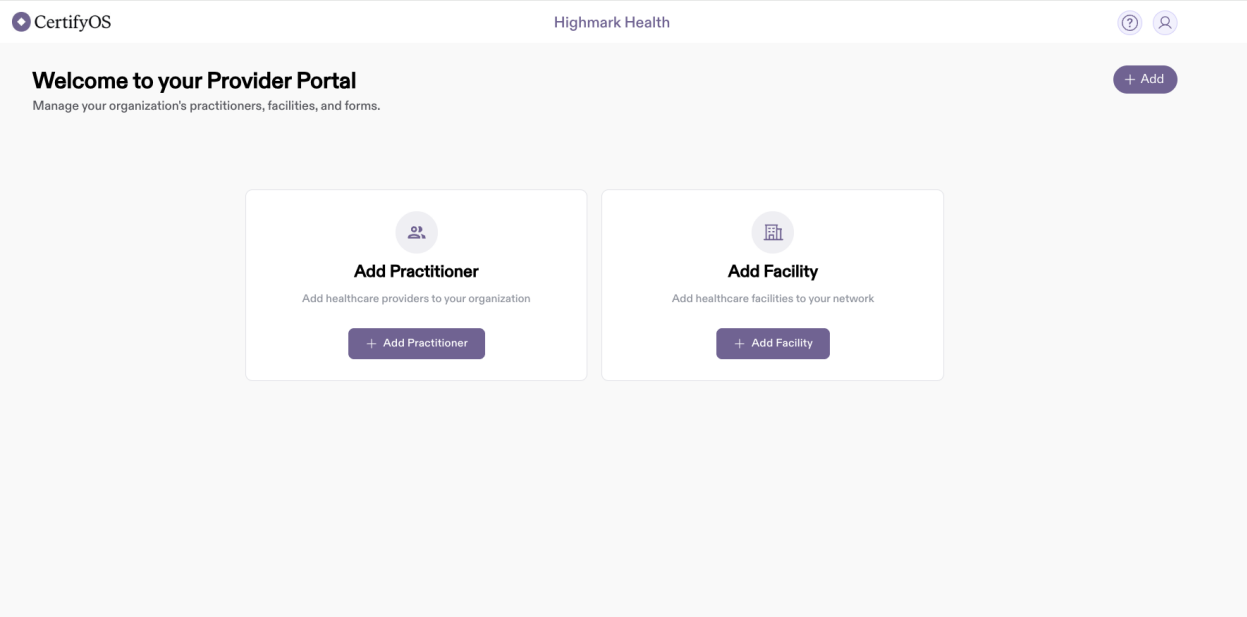
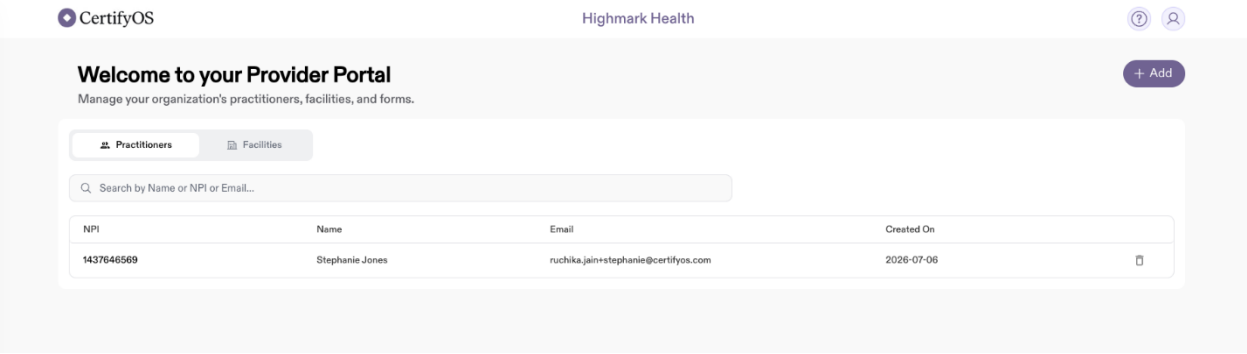
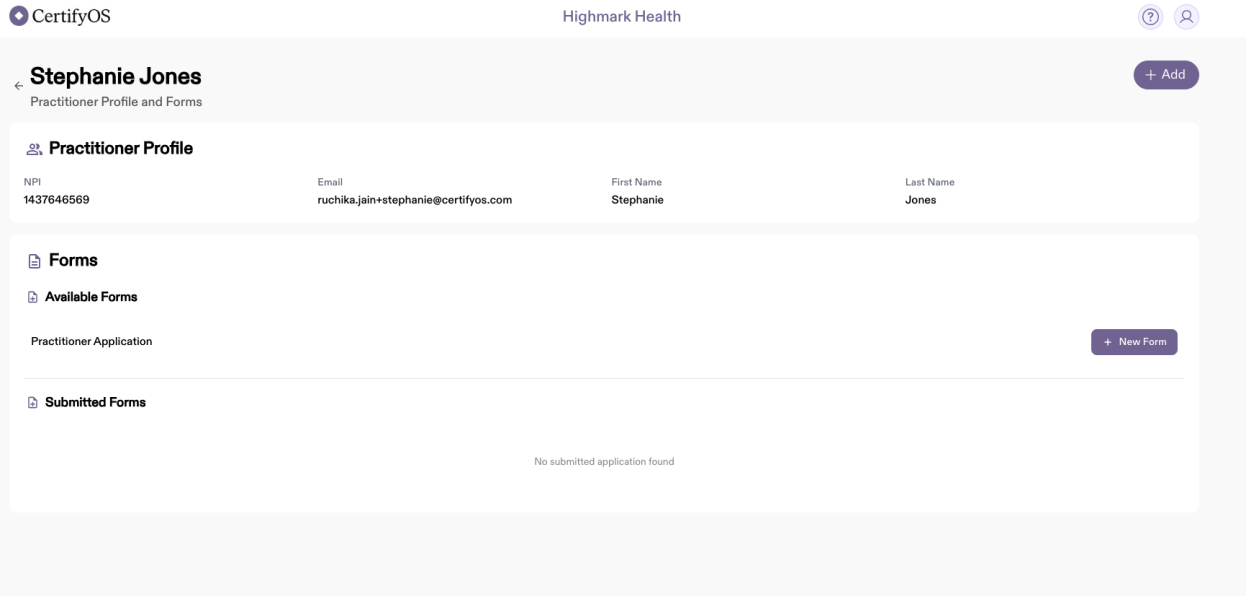
- 



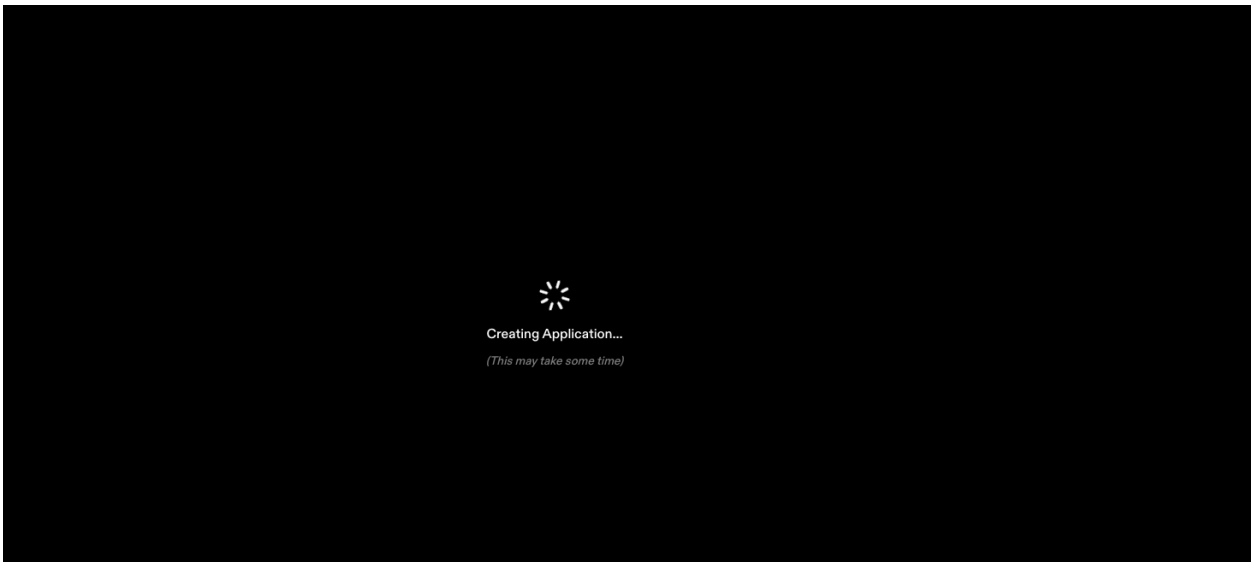
- To add more records click on ‘Add’ button on top right

Step 2 : Submitting an application

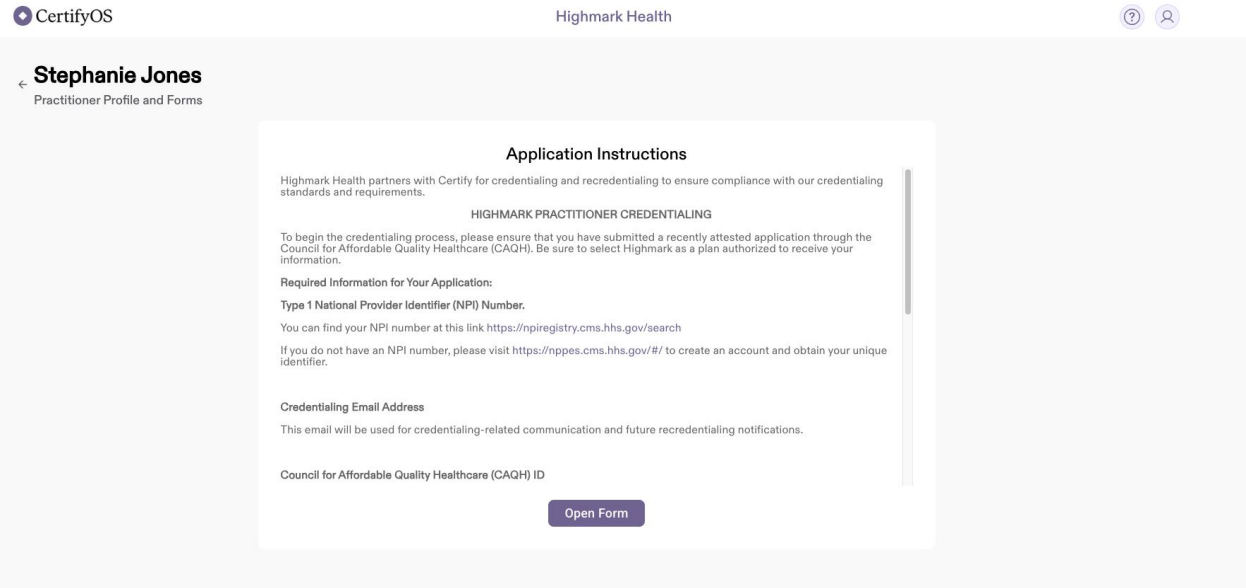
- Click on the record



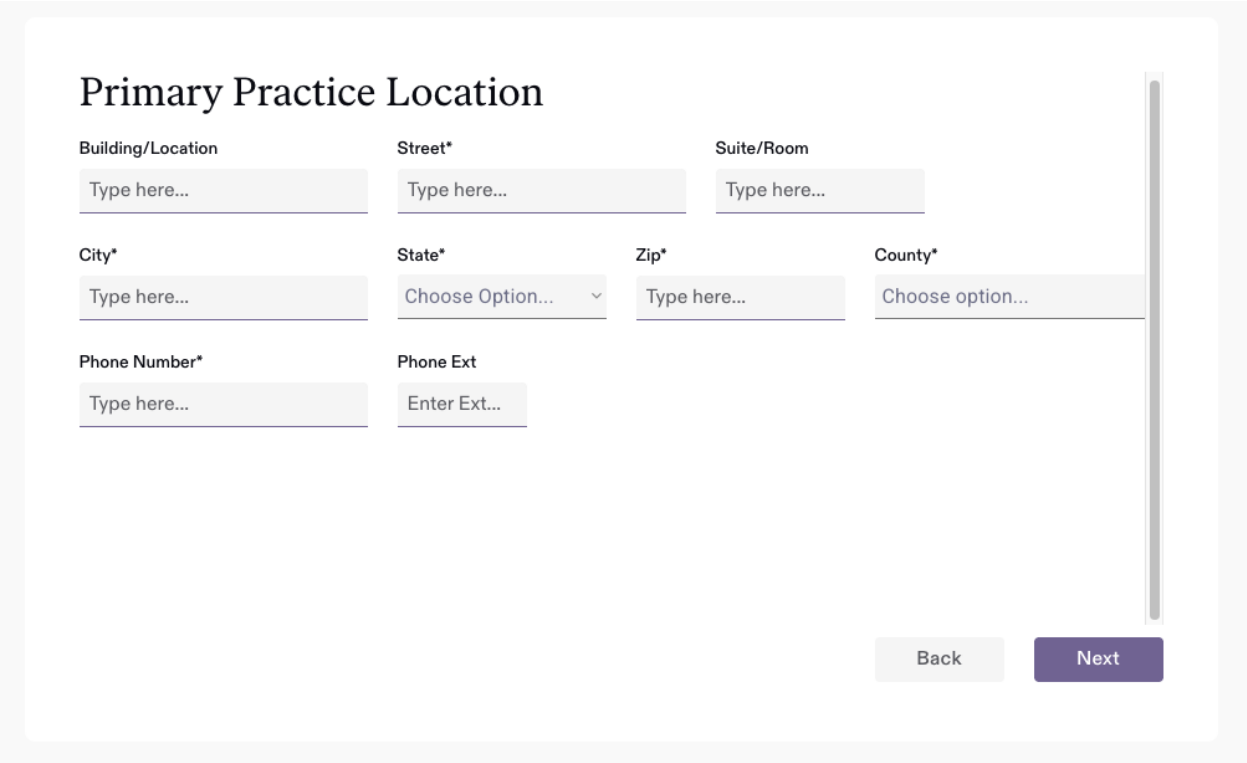
- Under the ‘Forms’ section, click on ‘New Form’ against the Application that is required to be submitted
- Please wait a few seconds while the form loads



- Once the form loads, please review the ‘Instructions’ page and click on ‘Open Form’

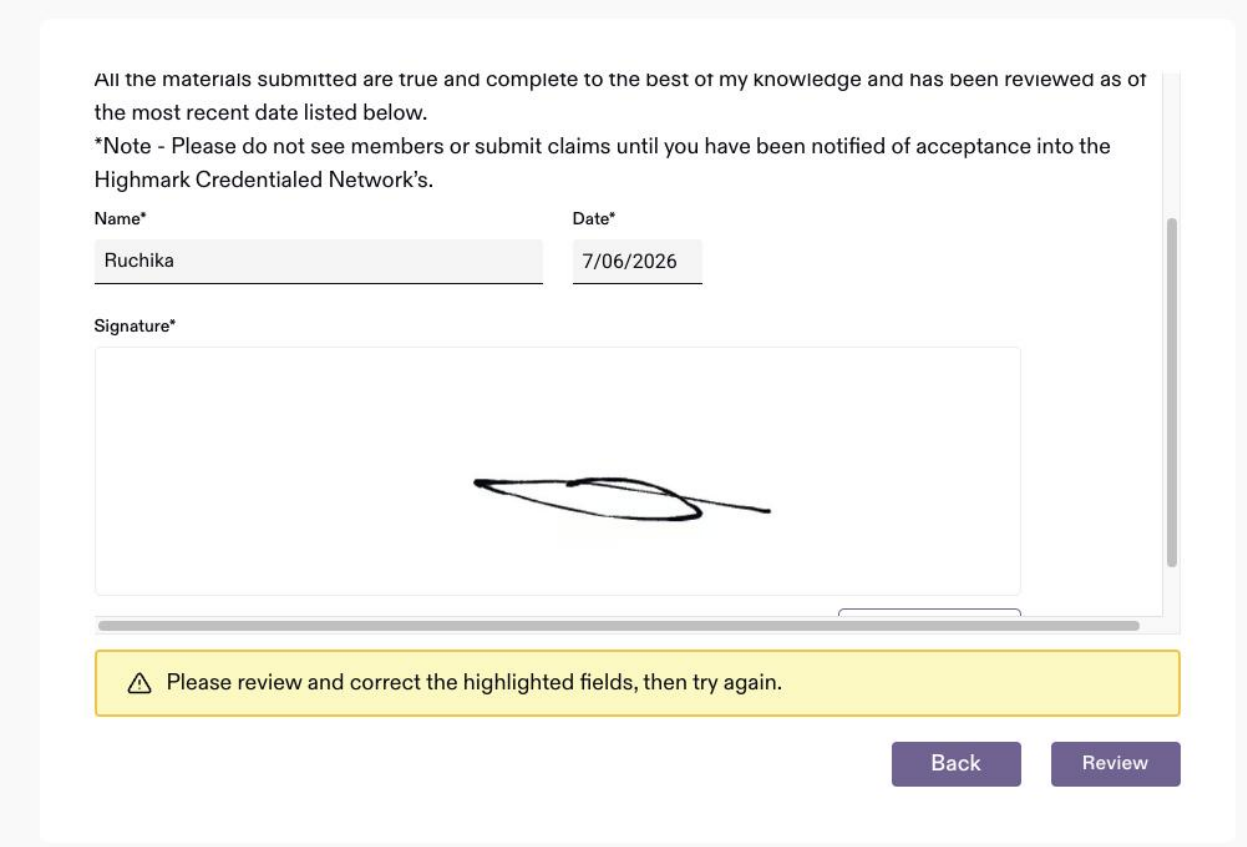


- Complete all the required information in the form and click ‘Next’.



- Attest the form and click ‘Review’

- If there are errors in the form an error message in yellow will show as below



  - In such cases please click on 'Back' and review the fields highlighted with any errors

- Once all issues are resolved click on Review. If there are no more errors, a preview screen as below will load.

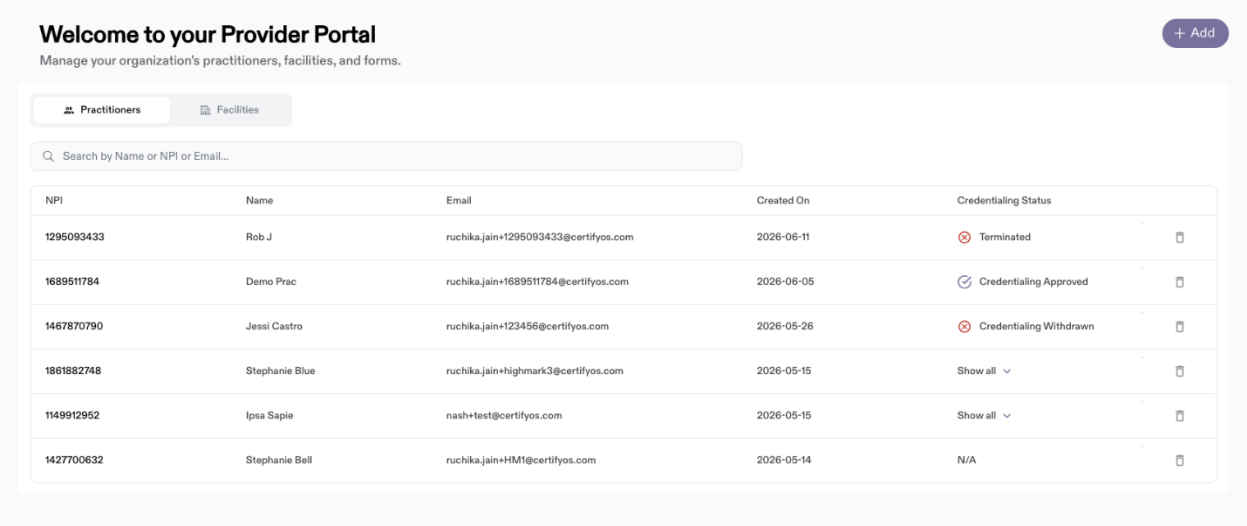
- Kindly review and click 'Confirm and Submit' if all data is correct

Step 3 : Accessing a submitted application

To view your submitted application(s) view the section 'Submitted Forms' and click on 'Download Form'

How to view the credentialing Status?

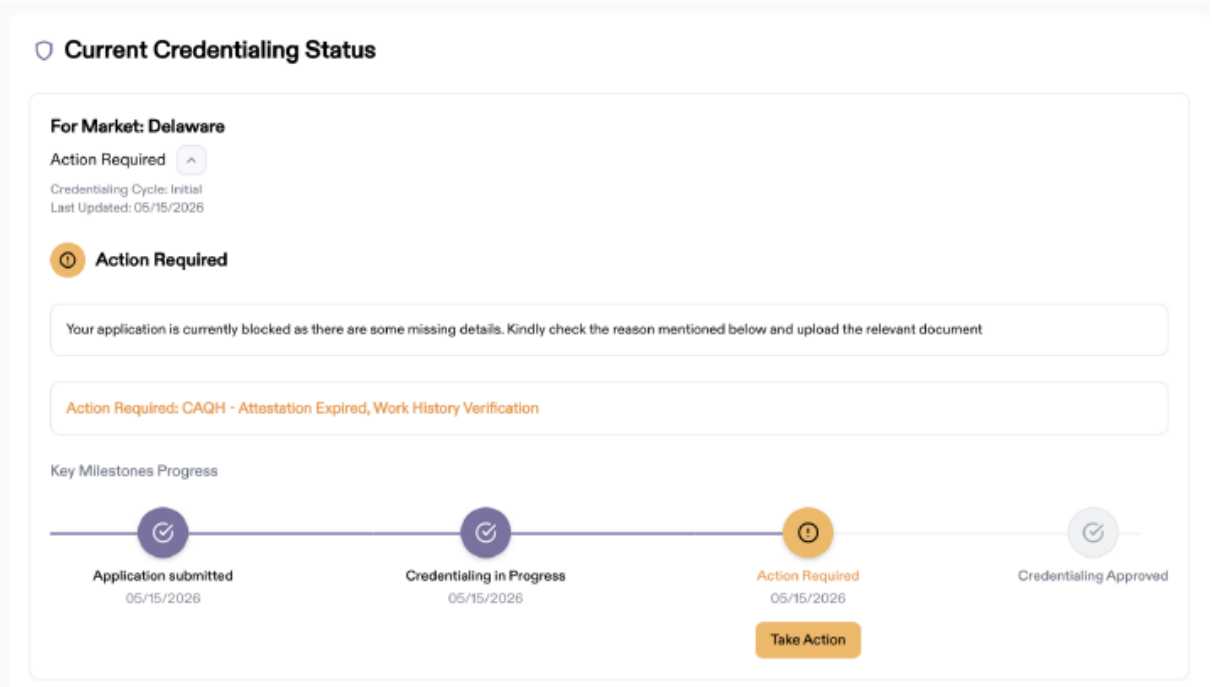
- Once a form is submitted, the credentialing status is visible in the Practitioner and Facility Tab as below



- To view detailed credentialing status, click on the specific record

- If the status states ‘Action Required’, click on the record

  Click the button called ‘Take Action’
  Upload required documents in the tab that opens



- Note - The credentialing Status will be approved after the uploaded documents have been reviewed

How to reset my password?

If Logged In

- Click on the ‘profile’ icon on the top navigation bar on the right.

- Enter the ‘New Password’

- Click ‘Update Password’

From the Login Screen

- Click on ‘Forgot Password’

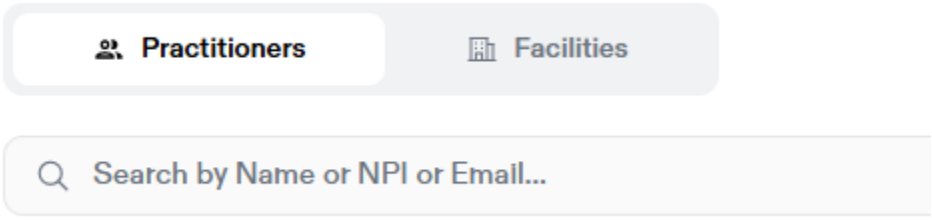
- Enter email address

- An email will be sent with a link

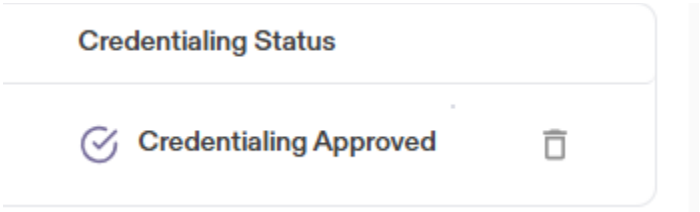
- Click the link and enter the new password

How to remove a provider from my dashboard?

- Search for a provider by Name or NPI



- Select the Trash Can icon located on the right-hand side of the provider’s record



- Confirm you would like to delete the record.

***Note: Removing a provider from your dashboard only removes the provider from your view; it does not remove the provider from any associated Medical Practice or Credentialed networks. To update provider data, please complete the appropriate form located on our Provider Resource Center.**

Need Help?

For more information, visit our knowledgebase center.
To contact our support team, drop an email to gethelp@certifyos.com .