

Certify








by Operations Manager

Credentialing, Licensing, and Enrollment

Details

Review Date	11/09/2023
Purchase Date	Q2'23
Implementation Time	Few weeks
Product Still in Use	Yes
Purchase Amount	Upfront retainer that gets spent down
Intent to Renew	15%
Review Source	Elion

Product Rating

Product Overall		2.5
Use Case Fit		5.0
Ease of Use		2.0
API		N/A
Integrations		N/A
Support		2.5
Value		4.0

About the Reviewer

- Purchasing Team
- User
- Implementation Team
- Product Oversight

Reviewer Organization

- Virtual-First Provider
- Care Navigation
- Primary Care

Reviewer Tech Stack

N/A

Other Products Considered

- Medallion
- SteadyMD
- Trek Health RCM
- Verifiable

Summary

- **Product Usage:** The user employs the CertifyOS platform for credentialing purposes only, utilizing a credentialing dashboard for tracking progress and submitting requests.
- **Strengths:** CertifyOS offers a wide range of services including licensing, credentialing, payer enrollment, renewal, and primary and secondary source verification.
- **Weaknesses:** The user found the organization to be somewhat disorganized and experienced substantial delays in the credentialing process due to the unavailability of immediate responses from subject-matter experts.
- **Overall Judgment:** Despite some improvements since a subject matter expert began joining their calls, the user remains uncertain about trusting CertifyOS to effectively scale with them and license and credential a large number of providers due to their early experience.

Review

Today, we're talking about CertifyOS. Before we begin, could you give me some background on your company and your role there?

I lead operations at a specialty care organization. We provide physical health, mental health, and care coordination support to our members. My role includes managing general business and clinical operations, finance, and our go-to-market strategy.

What core business problem were you aiming to solve with CertifyOS?

We had plans to launch in a market where we were going to begin accepting insurance. As a result, that meant we had to credential with multiple payers for multiple providers, which resulted in numerous applications that we didn't have the capability to support processing in-house. We wanted to partner with a third-party vendor to support us with credentialing and licensing, and alleviate the administrative burden for our team and providers. We were looking for an end-to-end vendor who operated in all 50 states, who could enroll all types of payers (Commercial, Medicare, and Medicaid), and who offered licensing, credentialing, payer enrollment, renewal, primary and secondary source verification, and more. Since most credentialing and licensing vendors offered this, we were looking for differentiation in white glove service, especially in making this process easy and painless for our providers. Additionally, since we're still an early-stage startup, we also needed to work with a partner who didn't have minimum application or provider requirements.

Which other vendors did you consider besides CertifyOS?

We looked at Trek Health, Verifiable, and SteadyMD. We had previously heard mixed reviews of Medallion, so we didn't pursue them, although they are well known in the space. We were interested in Verifiable and SteadyMD, but both of them had minimum provider requirements that we couldn't meet as a small organization.

Trek Health provided excellent white glove service, but we felt they were a bit too early-stage for our needs. Scalability was also a concern for us, and we felt that CertifyOS was more competitive in this regard as they were able to accommodate our current size, but also grow with us through up to delegated credentialing once we had 50-100 providers.

Besides pricing, how did these vendors compare to CertifyOS?

The process of credentialing and licensing is fairly repetitive and manual, so what stands out is excellent customer service, SMEs that understand the intricacies of credentialing and licensing, and creating a seamless experience for our providers. We conducted extensive vendor reviews but also relied heavily on word-of-mouth recommendations and customer testimony to understand what folks' actual experiences looked like.

How did you evaluate customer support quality?

I would ask about what their customer management structure looks like. Do you have a dedicated and knowledgeable customer success manager who you could have frequent check-ins with? Additionally, providers are expected to complete vs. what the vendor is managing when it comes to plan selection, the application process, negotiation, and follow-ups. How much assistance could we expect throughout the process? How often would they follow up when

we didn't hear back from a plan or board? I was also interested in knowing what support would be available to us if we had questions or needed assistance. Asking existing customers or trusted sources about customer service is also very helpful.

How did CertifyOS compare to other vendors in terms of pricing?

Vendors offering delegated credentialing or requiring provider minimums tend to be more expensive. However, the startup vendors in the credentialing and licensing space are generally quite competitively priced, and we found CertifyOS to be priced similar to other vendors of their size.

Was there anything noteworthy about the sales and onboarding process with CertifyOS?

We had a wonderful sales experience with a very helpful and attentive business development person who provided guidance on how we should think about our licensing and credentialing strategy and understood the nuances of the requirements. They also connected us to the entire team for a kickoff call which helped to enable a smooth handoff.

How have you used the CertifyOS team? What specific processes and functions have they assisted you with?

We use CertifyOS for credentialing purposes only. They have a credentialing platform with a dashboard for progress tracking and submitting requests, but we haven't used that extensively as it lacks detail. Instead, we have a weekly meeting with them where we discuss progress and raise any questions we might have.

Can you describe the end-to-end credentialing process with CertifyOS? What types of practitioners do you typically credential, and what does the process look like?

We credential a range of practitioners, including MDs, nurse practitioners, and social workers. The process starts with CertifyOS sending us a template to provide all the information needed for our providers' applications. They also ask our providers to complete profiles on official sites like CAQH for verification and help to pull plan enrollment numbers to help us decide which plans to contract with in a specific state. Once we aligned on which payers we wanted to get in-network with, CertifyOS initiated the enrollment process for our target plans. After submitting the applications, they either pass along the contracts we receive or inform us if the plans are moving on to credentialing our providers. They'll also follow up with plans if we haven't heard back within the timelines they provided. CertifyOS also can assist in negotiating contract terms, although we didn't use them for this. When we reach the signature stage and our providers are credentialed, we'll be enrolled or in network with the plan. That would be the end-to-end process of a single credentialing application.

Where has the CertifyOS team excelled, and where have they fallen short?

We had really mixed experiences with their customer success management. They assign a customer success associate who lead weekly meetings and provided updates on the progress made by the team the prior week and any inputs they needed from us to move forward. Some of the updates were also visible in their product dashboard, but because credentialing can be very nuanced, we often found ourselves with more questions than answers when looking at their platform alone.

Their customer success team is located in India, so unfortunately they lack a detailed understanding of the US licensing and credentialing system. They would provide us updates from the team, and when we would ask clarifying questions, they often couldn't provide immediate answers. We would often have to wait a week or two before we were provided

answers from a subject-matter expert, and then if we had more questions, the process would continue like this with 1-2 weeks in between each question. Additionally, sometimes they would provide us with wrong information, directly conflicting what we had aligned upon in a previous meeting or with a decision we had made together. As a result, escalated this issue to their senior leadership. Since then, a subject-matter expert (SME) has sat in on all of our calls. The SME has been wonderful to work with; she's very knowledgeable and has been able to answer most of our questions. And if she doesn't have an answer, she's quick and persistent to track one down.

The SME seemed stretched thin across many of their accounts, so it's unclear if this a new structure CertifyOS put in place or if this is due to our specific situation and the fact that we escalated our concerns to management.

Our interactions have improved significantly since the SME began joining our calls; we can now make tactical decisions during meetings and make progress much more quickly. However, the account management structure seems quite disorganized and the organization is definitely still building the bus while driving it. Our early experience has caused us delays in our credentialing process, and it took a few tries before we landed on a partnership model that worked for us. For early-stage companies looking to move fast, there might not be time to spend months figuring this out.

Which specific nuances was the customer service associate unable to address?

One example was when we had questions about how our providers should fill out a specific application, and our customer success manager didn't know the answer and had to ask a SME. It would take another week before we would hear a response from SME via our customer success manager, and when we had clarifying questions, the process would start all over again. We faced substantial delays due to needing to wait for answers to small tactical questions that should have been addressed promptly.

Additionally, another instance was when we needed to remove a specific line of business from a contract we were negotiating. The customer success manager would provide updates stating that we needed to sign the existing contract before moving forward. However, we'd just discussed the need for a new contract that aligned with our intended lines of business, which their team was meant to be working on. It was clear that there was a disconnect between the customer success team and the credentialing team actually doing the work

Since the subject matter expert has joined the team, has there been any improvement in the overall experience?

Yes, there has been a significant improvement. I'm much more satisfied with the progress we're making. However, I still find the organization to be quite disorganized. It's challenging to envision a future where I trust them enough to effectively scale with us and licensing and credentialing tens of hundreds of providers. We were forced to micromanage the process, and with that many providers it becomes impossible to do so.

It seems like you might be considering other options. What specific aspects would you be evaluating in a future alternative to CertifyOS?

We'd initially looked for an organization that could scale with us and support us, first with a small number of providers and then with a larger number of providers through delegated credentialing. We were looking for an organization like CertifyOS that could grow alongside us.

However, based on our experience with a larger organization – or at least with an organization that's prioritizing growth over high-quality customer service and cultivating expertise amongst their team – our focus has shifted towards finding a knowledgeable boutique service with a highly personalized, hands-on approach. Currently, we're more focused on licensing than credentialing, and I believe there are more boutique providers that specialize in licensing.

In the near term, that's the direction we're exploring. Ideally, we'll grow to a size where we can work with vendors that have provider minimums and offer a more solid foundation and have a stronger track record.

How has your experience been with the dashboard offered by CertifyOS? Has it been useful and reliable, and how extensively does your team use it?

The dashboard is relatively new, and personally, I haven't used it much, so I can't really comment on its usefulness. However, from my perspective, the updates provided on the dashboard are fairly superficial. The nitty-gritty details and specific questions about things like provider portal submissions or contract terms typically require additional conversations. The platform doesn't allow for the back-and-forth needed for these kinds of discussions, so we often default to having conversations instead of relying on the dashboard.

Looking back, do you believe that choosing CertifyOS was the right decision?

It was the best decision we could have made at the time with the information we had and size that we were, however if we were to make that choice again, I would have most likely gone with another vendor.

Are there any specific areas of growth that you would like to highlight for the CertifyOS team?

I would suggest providing more intensive training for the customer success team. Additionally, updating the staffing structure to allow for more direct access to SMEs who can answer specific questions in real time would help reduce the current lag. Alternatively, enhancing the product or platform to offer more flexible communication options where you can ask questions asynchronously would be valuable.

In your search for a new partner, you mentioned the need for stronger expertise in this space. How do you plan on assessing that expertise?

We'll primarily be reaching out to existing customers and customers who have left specific vendors to get their feedback on the service. We'll be asking questions about the account management, the responsiveness of the support team, and technical knowledge of the nuances credentialing and licensing. It can be challenging to assess the quality of account management based solely on the sales process – salespeople will always tell you that their product and their service are excellent. That's why we have to rely on feedback from trusted customers.

Do you have any advice for buyers going through the same decision-making process?

I would say it's important to talk to people who have left the vendors you're considering. It gives you a better understanding of the potential challenges you may face with the platform. I'd recommend talking to several customers you trust as part of your due diligence, as well as trying to connect with someone who might serve as your account counterpart; that will give you a sense of what your relationship and dynamic with them could be like.