Medallion

by Director, Clinical Ops

`Credentialing, Licensing, and Enrollment`

Details

Review Date	08/09/2023
Purchase Date	Q3'22
Implementation Time	N/A
Product Still in Use	Yes
Purchase Amount	N/A
Intent to Renew	90%
Review Source	Elion

Product Rating

Product Overall	▬▬▬▬▬▬	4.0
Use Case Fit	▬▬▬▬▬▬	4.0
Ease of Use	▬▬▬▬▬▬	4.0
API	▬▬▬▬▬▬	N/A
Integrations	▬▬▬▬▬▬	N/A
Support	▬▬▬▬▬▬	4.0
Value	▬▬▬▬▬▬	N/A

About the Reviewer

`Purchasing Team` `User`

`Implementation Team` `Product Oversight`

Reviewer Organization

`Virtual-First Provider` `Metabolic Health`

Reviewer Tech Stack

`N/A`

Other Products Considered

`N/A`

Summary

- **Product Usage: Medallion is used for network credentialing and delegated credentialing for healthcare providers, with the platform facilitating the verification of information submitted by these providers.**

- **Strengths: The platform has a user-friendly interface and significantly improved processing speed compared to previous vendors, with most applications processed within a few days.**

- **Weaknesses: The platform lacks the ability for customization, doesn't notify when a secondary verification is complete, and doesn't fully support providers in understanding and completing the credentialing process.**

- **Overall Judgment: While Medallion's service and user interface are appreciated, areas for improvement include ability for customization and more proactive communication regarding task completion. Their utility for a specific organization may depend on the complexity of the credentialing needs such as multiple state licenses.**

Today we're talking about Medallion and how it's used at your company. Could you give us a brief overview of the company and your role there?

I work for a digital health company providing telehealth to patients all over the US. We work with commercial, Medicaid, Medicare, and a few employee-sponsored plans; 99% of our patients come to us via insurance. We provide telehealth services and social services to reduce the incidence and risk of chronic disease and associated symptoms. We have the largest national network of our provider type in the country.

I am the Director of Clinical Operations and have a prior background as a clinician. I work on process improvement efforts and figuring out how to scale. I work closely with other teams on patient retention, trying to assess customer lifetime value and acquisition costs. That involves coaching providers to enable them to retain patients and get multiple follow-ups. I also work closely with our product team, in terms of choosing the types of vendors we want to use as we scale as well as building our own internal tooling.

Could you give a quick overview of how you use Medallion?

We use it both for network credentialing as well as delegated credentialing. I can speak more to the internal, delegated credentialing side. When we bring on a provider, one of the first things they do is they fill out what's called a credentialing application with Medallion. They provide standard personal information including the credentialing number for their provider type. They also provide information about their license, education, work history, sanctions and monitoring, etc. Once completed, Medallion will go through and verify each component using primary sources. They might say they did their bachelor's degree at a specific school, for instance, and we'd go to the school and verify that that is true. At the end of this part of the process, Medallion returns a complete file to us, verifying that it's complete and nothing has been flagged. We then take that to our credentialing committee meeting and make a decision about their ability to practice with us based on that. After that, they are a part of our network. We have delegated credentialing agreements with several payers. This means that they delegate the credentialing for that contract to us, such that a provider that we've credentialed can see that plan's members.

How long have you guys been working with Medallion?

We've used them for internal delegated credentialing for three months, but for network credentialing for over a year.

Who within your organization interacts with the Medallion system?

I work with Medallion quite a bit. At the moment, we outsource credentialing to an external team of contractors who work on both network credentialing and internal delegated credentialing. This is a team of three to four people who take on the administrative tasks. Our VP of Operations is also involved at the moment but the goal is for this team to take over from both her as well as me.

On the Medallion side, we have a customer success manager who has a team of two or three other people who are support representatives. I've also interacted with their Head of Credentialing Operations a few times.

Could you walk us through the workflow of using Medallion?

It's a web-based interface that is very user-friendly, especially compared to the previous vendor we used, which was called CredSmart (it felt outdated). On the home page, you can see a task overview. Each provider is enrolled in either credentialing tasks or payer enrollment tasks. For example, within credentialing, we might have a provider who has not added her national credential number, so the task at hand for her is to add that, following which the Medallion team needs to verify that. Within payer enrollment, a provider might have a task like work history and CV, which would mean that they need to add those details onto the platform. Essentially, the home page is a long list of all the providers and task types or action items for each one. I don't interact with this page much.

I mostly work on a couple of tabs – the provider and credentialing tabs. When you initially set up a provider on Medallion, you invite them to the platform with the click of a button. We send them email instructions about being added to the platform and what they need to fill out on it, which we wrote with Medallion's help. We've realized that providers tend to miss some pieces of the process, so we highlight the things we need them to do. For example, someone might have a maiden name on their degree transcripts that they forget to add. Once I've invited the provider, I switch to the credentialing tab and request them to start the credentialing process. I don't have to wait for a profile to come back complete before I can request credentialing – it all happens at the same time, which is nice. That means I don't have to go in and monitor whose profiles are complete or not.

The credentialing tab has five sub-tabs – in-progress, ready, committee, closed, and re-credentialing. When a provider fills out their application, it's in the in-progress tab. Once Medallion verifies every element of the application, it's moved to the ready tab. From there, someone will go through and look at the application to make sure it's complete. This is a requirement a lot of our payers have for audits; it's not a Medallion requirement. Once that's done, we move that application to the committee tab, which indicates it's ready to go to committee to be reviewed. After that, committee members vote and it is moved to the closed section.

The last tab is re-credentialing, which happens every two years. It's a similar process, but not every single element needs to be verified. As an example, education only needs to be verified the first time, during the initial credentialing.

The workflow appears to be a combination of software and service in that there's a few manual steps. Is that typical of all credentialing software or is it specific to Medallion?

It's probably true of credentialing in general. It relies on the provider to fill out the application and can't be done without that step. With verification, the point of that part of the process is that it's done manually. Plans and auditors want to see that a piece has been verified by a human being. For example, when you're verifying a clinician's training the clinical director needs to sign off that this person completed their training at the school that they named. I'm curious to see how credentialing companies are impacted by AI tools.

The manual nature was a huge roadblock in 2020, during the pandemic. A lot of people were working from home and didn't have access to physical files, so they couldn't really verify anything.

I'm curious how your experience has been with Medallion's service.

I think there's always a learning curve. That was true of CredSmart and it's true of Medallion. With both vendors, we've educated them on our provider types. Every state has its own licensing requirements for our provider type and there are a number of states that don't require licensure. At the beginning, we'd get questions like 'How do we verify a X state's license?' and we'd say you can't because it doesn't exist. So we've had to provide a lot of education about specific requirements.

So, you have to train them on the process and they're now executing against that. How has their implementation been?

It's been okay.

Given the nature of our provider type, there wasn't a field within the platform that aligned with one of the key pieces of information we needed to collect. But the platform, I think, couldn't be customized to make that a mandatory field since it's not required for other specialties. So, in the beginning, we had a lot of files coming back without that data having been verified.

Got it. More broadly, how would you characterize the quality of Medallion's service?

I'd give it a B right now. There's definitely room for improvement and a couple of product enhancements that we have asked for that they say that they're working on. We haven't yet seen the results of those.

There are some things I'm surprised they don't have. For example, a lot of our providers get multiple state licenses because we are virtual and it's a way to both expand capacity for us as well as to expand the number of patients they can see. And so a lot of times, someone will go through initial credentialing. So that's of course the first time they get credentialed with us – we verify and then approve all elements of their application. After that, when they get other licenses, we'd like to have a license-only verification pathway where a provider can add a new state license and just that will be verified without re-verifying the whole file. Not having that leads to a waste of resources. Moreover, going through the whole process again changes the attestation date and we want the attestation date to reflect the initial credentialing. We don't want it to be updated with a license-only verification and we especially don't want to override the initial attestation.

Beyond that, adding a new license triggers their team to verify it but the platform doesn't alert us when it's completed. We don't get notified when someone who has already been initially credentialed has a new license that has been approved. So, we have to manually go through and figure out who has a new license. I can do this because I have a pulse of all of our providers – who's getting a new license and where. But the team we're coaching to take over the process doesn't know our providers in that way. For them, it's just a large number of brand new names.

How much of these challenges is due to the unique nature of the providers you're working with and how much has to do with Medallion's product and capabilities?

I think it's a combination of the provider type, Medallion not having worked closely with these providers in the past, and our current scale. My guess is that not many digital health companies are hiring and onboarding as many providers as we are, regardless of provider type. We're just at a volume where we have a lot to keep track of. It would be fine if we had three providers who were getting their Illinois license this month. That's fine. But when it's hundreds, it's very difficult to keep track of.

What aspects of the product or service work well for you?

The user interface is pretty user-friendly. On the provider page, there's a circle that is like a wheel of progress. So if it's 55% complete, half of the wheel will be filled in. It'll also be highlighted in red because 55% is not that complete, but complete files will have a green circle with a green checkmark. You can even hover over that wheel to see exactly what's missing.

Something that I would love for Medallion to have is to have a report on who you've credentialed for your platform. When you do delegated credentialing, you have to maintain a roster of providers, containing specific information. For

us, that includes name, NPI (National Provider Identifier), license numbers, date of completion, and date of credential approval. I wish we could house this within Medallion instead of within a Google sheet, make changes on the platform, and access it any time. Ideally, we would also be able to filter because some of our contracts request a roster for the providers that are in network with them.

I'm curious if you have a sense of what the ideal type of client organization might be for Medallion. For whom would they work best?

My guess would be an organization with doctors at one physical location, so don't have to deal with multiple state licenses. Working with people in all 50 states who could be licensed in the majority of them adds considerable complexity to our work. It's a lot of work to both have the provider constantly updating their licenses when they expire and then have Medallion verify them.

Touching upon procurement, could you walk us through the evaluation process and how you chose Medallion?

By earlier this year, we were pretty set on Medallion. We were already using it with network credentialing and we didn't want to use two different sites for the two types of credentialing. Both for us and for the provider, it would have been very confusing to know which site to go to. I don't remember enough about the procurement process to share why we chose Medallion.

And how has ongoing customer support been?

We have a weekly meeting with them. They've recently pulled in their head of credentialing operations to help us out a little. It was a little challenging in the beginning because our first customer success manager was transitioning out of her role. But they've been pretty receptive to feedback. That's not to say there aren't any pain points. For some features or services, we know they're in the product pipeline, but there isn't enough clarity on how soon we will see the changes. I would say it's probably a B overall.

Would you be able to share any details about the pricing structure?

For the internal delegated credentialing side, I think it's a per-person (per-provider) cost. There might also be some type of underlying implementation cost. There's also an additional cost for enrolling the provider in ongoing monitoring, which is a monthly poll of sanctions and limitations on licensure.

Do you have any integrations set up with their product? Or do you build against their APIs?

We haven't yet, but I'd like to explore that for a couple of different use cases.

Is there anything to share about your experience working with them that we haven't covered yet?

When we began, we were under the impression that they would be owning the shuttling of a provider through the credentialing process. After the first email that we have to send with instructions, Medallion said that they would follow up with the provider if an element was missing. They would send emails on specific cadences to nudge them towards completing it. From my point of view, that wasn't happening for some time. I was a little disappointed they didn't have more ownership over that because I didn't want to and didn't have capacity to take that on. So, we asked for more automated emails, e.g., if the provider had an open action item, they would get a text from Medallion about fixing whatever was incomplete in their ongoing application.

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For context, most of our providers don't understand what credentialing is and why it's important. It's boring and nobody wants to do it, but it has to be done before they can see patients. I think we really just wanted more follow-through and ownership of supporting a provider through completing their application.

Were there any resources that Medallion provided to help you ensure your providers understood the need for credentialing?

They put the onus for that on us. So, we wrote a few paragraphs explaining the process and why it was important, how it protects the patient, how it protects the provider. Medallion looked at it and said it looked good.

We were at a point where not many applications were being completed, so we wanted to do a text campaign to remind providers to complete their applications. Eventually, Medallion provided us with a phone number report, but it took a while to get there. It would be great if we could go in and just download that report ourselves. Ideally, they would have a button that we could click that says, 'Remind provider,' and we could choose email or phone or text. I think that would have been useful.

In terms of their turnaround time, how have they been? I'm not sure if you have service-level agreements (SLAs) around that sort of thing.

At the very beginning, they said it would be a couple of days. Unfortunately, it took more than that. I think they meant that if the information in an application was complete and verifiable, it would take a couple of days to process. But sometimes there are delays. So, in some cases, it could be a couple of weeks. I would say, right now, 70-80% of our applications come back within a couple of days. I want to note that this is miles ahead of CredSmart, which took somewhere like 30 days. It's definitely an improvement.

To wrap up then, what do you like most about the product?

I think the user interface is very user-friendly, both for us internally as well as for the provider. It's clear what needs to be filled out.

What do you dislike most about the product?

The inability to customize it – for example, making the certification field mandatory or being able to customize reports or a roster of providers.

What is the likelihood you'll continue to use the product for the next 18 to 24 months?

Very likely for the rest of our year-long contract. I wouldn't be surprised if we tried another platform after that, except for the fact that migrating providers from one credentialing organization to another is a monstrous effort. We're still dealing with the fallout of doing that this year. So, I would not be surprised if we wanted to switch but couldn't because it was too difficult.

Do you have advice for anyone who is in your shoes?

Try to demo the product and see what the user interface looks like, internally as well as for providers. I would ask about what the contract says about migrating off it and what they do to support that. I would investigate how they handle new product requests and what the time to implement looks like.

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