

# Symplr CVO








by VP

Credentialing, Licensing, and Enrollment

### Details

Review Date	12/14/2023
Purchase Date	Q4'22
Implementation Time	3 month training period
Product Still in Use	Yes
Purchase Amount	\$6k/year + \$10k implementation
Intent to Renew	0%
Review Source	Elion

### Product Rating

Product Overall		1.0
Use Case Fit		1.0
Ease of Use		1.0
API		N/A
Integrations		N/A
Support		3.5
Value		2.0

### About the Reviewer

- Purchasing Team Implementation Team
- Product Oversight

### Reviewer Organization

- Primary Care Clinic Primary Care

### Reviewer Tech Stack

- Medallion

### Other Products Considered

- N/A

### Summary

- **Product Usage:** Symplr is used for the peer review process to monitor provider quality for a behavioral health group, streamlining an originally manual operation.
- **Strengths:** The platform was affordable and the company offered responsive customer support throughout implementation.
- **Weaknesses:** Symplr suffered from an antiquated user interface and problematic account setup for providers which was difficult to manage on a large scale.
- **Overall Judgment:** Despite the affordable cost, the user interface difficulty and provider setup issues resulted in dissatisfaction with the selection of Symplr for peer review operations.

## Review

**So today we're chatting about Symplr and how it's used at your company. Before we jump into that, could you give a brief overview of the company and your role there?**

We're an outpatient multi-specialty behavioral health group. We provide both in-person and telehealth services. We provide talk therapy, medication management, and transcranial magnetic stimulation. I'm the Vice President of Payer Strategy and Relations. I handle all our health plan contracting and oversee our credentialing team, which is where Symplr comes in.

**What was the problem that drove you to look for a product like Symplr?**

We've executed a number of delegated credentialing agreements with some of our large payers over the last year and a half, and part of those agreements is ensuring that we have the ability to monitor our provider quality. Symplr is the platform we had identified to use for our peer review process. We were doing all our peer reviews manually before identifying Symplr as a software platform. Our teams were essentially using Word documents — it was a very archaic process. So that's when we started to look for a technology platform that could help us do this stuff digitally, generate reports, and just generally be more efficient for our clinicians to use.

**Could you explain how the peer review process works?**

From a clinical perspective, peer review is a way for clinical providers to review their colleagues' work. It's not meant to be disciplinary, it's an oversight process that we continually do for all our providers, to make sure the quality of their care is meeting the standards that we hold ourselves to as an organization. So we conduct our own credentialing in-house, to review providers' licensure and ongoing monitoring checks and make sure they're not on any excluded lists. And then when we go to re-credential a provider, we already have a history of the quality of their work over the last three years to make sure they've been maintaining quality, so we meet the requirements of our delegated credentialing agreements.

**What requirements did you have in mind for a peer review tool?**

Our payer requirements under the delegated agreements were a little vague, honestly. Most payers allow the provider to determine how they want to assess and monitor quality. We felt this process made the most sense because we didn't want to duplicate our efforts — we'd be doing peer review either way, we just wouldn't report the results back to the payers.

**Did you look at any other vendors before selecting Symplr?**

We did, but I can't remember the names, I apologize for that. Symplr was the cheapest, and I think we learned a valuable lesson there that you get what you pay for. Price was the main driver for us. Some of the other vendors provided a more robust offering, but the cost was so much higher it became a non-starter.

**How was the sales and onboarding experience?**

The sales process was fine. We redlined the agreement and went back and forth with their sales team, and executed a BAA.

The onboarding and training process was the real burden, because of how long it took, how time-intensive it was, and the number of staff we had to dedicate to the process. It took three months, with trainings each week on a different portion of the system, like setting up the profile, looking at the reporting options, conducting a peer review in the platform, and how things got routed to the providers. After the training, we got access to the platform and were expected to start training our teams internally. We did have time scheduled to come back and talk through any concerns that we had. They were very responsive and answered our questions. They did support us through the process, I don't want to make it seem like they weren't helpful. But it was just a lot for us to try to learn in that amount of time, and then we were expected to turn around and train all of our providers on top of that, so it wasn't a very efficient rollout.

### **Could you walk through the workflow of using the system?**

Initially, every single clinician we have has to get set up in the platform as a provider: we tag them with the type of service they provide and the region they're in. For the actual peer review process, providers were picked at random by our clinical team — that's not something the system did automatically. Once we identified the providers, that information would be sent to other providers within the organization, who would then go in and conduct their peer review.

The actual peer review involves looking at appointments in a provider's history: two intake appointments with new patients, and two follow-up appointments with established patients. The platform provided a decent amount of guidance for this and thankfully most of our providers know how peer review is supposed to work. For a prescriber the process is more involved, because they're prescribing meds and the review involves ensuring that everything is done correctly there, whether meds are being prescribed appropriately and controlled substances are being correctly handled. For the therapists it's much more simple. But overall the reviewer looks at the appointments and checks if there are deficiencies or errors in the documentation. A minor deficiency is one or two; a major deficiency is more than five. One shortfall of Symplr was that reviewers had to go into our EHR system to pull up the appointments: they couldn't view them directly in Symplr.

And finally, Symplr does have reporting functionality so you can look at how many peer reviews are conducted in a month, or look at specific reviews.

So that is how the process should work, but it was not very intuitive as far as sending out notifications to providers, closing out a peer review, getting providers onto the system, etc. The new user setup process was very antiquated. To add a provider to Symplr, the system would send them an invite email with a link that expired after 24 hours. And you can imagine that in a big organization with a ton of clinicians, it would be very hard to get everyone to respond to those requests within 24 hours! So we were constantly having to resend requests to get providers access, and that was a nightmare. And then we kept having issues with providers not knowing how to close out a review, so we had reviews that just stayed open and looked like they were pending when they were really completed. There wasn't a good way to close the loop there.

### **Did Symplr have a standard scorecard that gets generated after a review?**

It's not really a scorecard, it's more just what fields are in the platform and how many of those fields are filled out. That's one reason we're looking at using Google or Microsoft forms, because we can do the same stuff that this platform is doing with just a form.

### **How would you characterize Symplr's UI?**

I don't think it has a lot of bugs, the platform functioned well enough, it was just that it was very antiquated and clunky. Providers don't know where to go, and we have to constantly re-educate them on how to use the system.

**How would you characterize any strengths or weaknesses that you've encountered with the platform?**

I would say their account management and support was a strength, but I can't think of any others. The process of getting providers set up for access is a major weakness that they definitely need to update, along with making the platform more user friendly.

**How was the account management and support experience?**

They were very quick to respond to inquiries, they didn't miss or have to reschedule meetings, they were very prompt and answered all our questions during implementation. So they did everything from a customer experience perspective that they could have done, it was just that their offering wasn't up to snuff.

**Do you feel like you made the correct assessment in going with Symplr?**

No.

**If you could go back and do it again, how would you have changed your process to better understand the peer review options out there**

I think we probably would have identified more options, which would have better informed our decision. We did a short demo with Symplr but could have done more to get a better idea of the platform. Those two things I think would have helped us make a more informed decision.

**What advice would you have to management at Symplr to improve their offering?**

Well it's very easy for me to recommend these things, but probably harder for the company to implement! I would definitely advise them to invest more heavily in their technology offering, and that they need their design team to work more closely with clinicians to understand their needs better and what their expectations would be in using a platform like this. We talked about this internally, that it seemed as if they built this platform without even talking to a clinician. We rarely get any good feedback from our clinical team on the product.