Certify
by Director of Clinical Programs

Credentialing, Licensing, and Enrollment

Details

Review Date	11/15/2023
Purchase Date	Q1'23
Implementation Time	Immediate
Product Still in Use	Yes
Purchase Amount	$5,000 retainer. Licensing: $350 per PA license, $750 per MD license. Credentialing: $200 per provide per payer.
Intent to Renew	N/A
Review Source	Elion

Product Rating

Product Overall		3.5
Use Case Fit		2.5
Ease of Use		2.0
API		N/A
Integrations		N/A
Support		4.0
Value		3.5

About the Reviewer

N/A

Reviewer Organization

Specialty Practice   Orthopedics

Reviewer Tech Stack

Google Sheets

Other Products Considered

N/A

Summary

- **Product Usage:** The reviewer uses CertifyOS for handling licensing and credentialing requirements of their national telehealth company.

- **Strengths:** CertifyOS has been successful in obtaining licenses for the reviewer's organization, providing good customer service, and beneficial pricing.

- **Weaknesses:** Communication, lack of transparency, handling multi-state telehealth credentialing, and a non-intuitive dashboard have been notable downsides.

- **Overall Judgment:** The product is suitable for straightforward licensing requirements, but struggles with complexity, particularly relating to telehealth credentialing across multiple states.

Today, we're talking about CertifyOS and how it's used in your organization. First, could you give us some background on your company and your role there?

We are a value-based tech company in the orthopedic space, founded about three years ago. We initially focused on building our tech stack and product while targeting self-funded employers; however, we realized that wasn't the right fit for us. We now exclusively work with health plans, particularly ACOs and Medicare Advantage plans. Our role is to take on full risk in relation to their orthopedic patient population. I am the director of clinical programs and the only clinician on the team; I have been an orthopedic PA for about 22 years and lead the orthopedic team.

What was the need that drove you to look for a product like CertifyOS?

Aside from a few collaborating doctors, I'm currently the only clinician. When we realized that we would need multiple state licenses, I started getting them on my own. I was able to get about five, but it was an incredibly tedious and time-consuming process. I likely would have continued obtaining licenses myself, but then we also needed to start Medicare credentialing. It just felt like there were endless hoops to jump through, and we weren't sure whether we were doing it correctly or not.

The chief of staff and I were trying to navigate this on our own. Initially, we connected with a woman who does credentialing for smaller practices, but within a month, it became clear that she wasn't the right fit. That's when we decided to go with a bigger vendor.

CertifyOS had reached out to us about a year prior, so we didn't really explore other options—we just knew about them and decided to go back to them. That's what prompted our decision.

Did you look at any other vendors at all?

No, not at all.

When you decided you needed a bigger vendor, were there specific requirements or attributes you had in mind?

We were aware that we're a bit different because we're a national telehealth company and our model involves mid-level providers who often require collaborating physicians. It's not a simple one-practice, one-location scenario. We understood that credentialing in this context can be different, but we felt confident at the time that CertifyOS had experience in the telehealth market and could handle our requirements. That was our concern, considering our unique product. However, in hindsight, our due diligence may not have been as thorough as it should have been.

How was your experience with the sales process with CertifyOS?

It was good. We started speaking to one of the founders about 18 months ago. They were always available to answer our questions during that time, even though they recognized that we were still in the early stages and didn't necessarily need their services yet. However, every time we re-engaged with them, CertifyOS was fantastic. They were eager to answer questions and push things forward without being intrusive. They made the process really simple for us.

How did you find the onboarding process?

Once the sale was finalized, the onboarding process wasn't as streamlined as we expected. It seems that CertifyOS is still in the earlier stages of their company's lifecycle, which we may not have fully realized. They had us fill out Excel sheets with our provider information, and the communication within their team wasn't always clear. If we updated the paperwork they needed from us, those changes weren't always communicated to everyone. They were in the process of transitioning to Airtable, which caused some issues, so our onboarding experience was a bit disjointed.

What are your thoughts on CertifyOS's credentialing offering?

We added credentialing perhaps a month or two after CertifyOS began to handle licensing for us. It's still not entirely clear to me how many people are on the team. We have one individual who meets with our licensing people weekly to discuss credentialing.

In theory, the CertifyOS team initially asks for your logins to your state licensing board and NPS profiles, on the understanding that they will handle any necessary updates in those databases for the credentialing process. However, in practice, that hasn't happened smoothly. We've encountered some hiccups where applications were denied because our profiles lacked specific information that they should have supplied.

There seems to be a substantial disconnect between the teams. They transitioned from an Airtable—which is where our information, communication, and action items were meant to be held—to a dashboard, but the new dashboard still isn't very user-friendly. The credentialing team member, the licensing team and I are now using a Google Doc to communicate and keep track of action items—which, ironically, has been the most efficient approach to date—but that was just implemented last week.

Until now, there have been numerous emails with slow response times on the credentialing side. We have added states quickly and occasionally realized we don't actually need Medicare in a particular state because the contract didn't come through, so the process has been a little disorganized, but I think the biggest issue we've encountered is the lack of communication and what seems to be a lack of expertise in telehealth credentialing.

Most payer contracts have standard language requiring hospital privileges and being part of a call schedule, which we don't meet since we're not physically located in those states. As a result, we've been denied by several payers. We're in the process of transitioning to another vendor who has a great workaround for this issue. So, in summary, CertifyOS's weakest points are the credentialing process and their communication.

What has your experience been like with the licensing side at CertifyOS?

The licensing process has been much better because it's more straightforward than credentialing. We have one team member from CertifyOS dedicated to licensing—although in our last meeting, he mentioned that they're adding an additional team member due to the high volume of licenses we need. We still face difficulties with communication; we rely on emails and meeting minutes, which can make things somewhat disjointed and make it challenging to keep track of the chronological order of events.

However, I must acknowledge that they are successfully obtaining the licenses they apply for; despite the process not being perfect, they are getting the job done. Overall, we have been pleased with their performance in licensing.

What does the product or user interface look like?

Initially, the product used Google Sheets along with an Airtable setup. However, the Airtable was not very user-friendly or intuitive. They then abandoned the Airtable and developed a dashboard, but the dashboard is limited in functionality

and not very user-friendly either. They are now in the process of revamping all of that. Currently, we rely strictly on our running meeting minutes as a makeshift solution to keep track of progress, which is working for us.

They also offer a licensed monitoring product at an additional fee. I haven't had a chance to explore that yet, but it's designed to notify providers when their licenses are due for renewal and guide them through the renewal process. That feature seems to be the most developed aspect of their product, although I haven't personally seen it in action.

How would you assess the strengths and weaknesses of CertifyOS?

I will say that everyone on the CertifyOS team is doing their best—their performance isn't related to a lack of effort. However, there is a significant lack of organization on the back end. They don't have a functional dashboard that automatically updates and communicates inputs to the team via notifications. Instead, they rely on email with everyone being CC'd, which leads to a lot of duplicative work and communication issues. Communication is their biggest weakness, along with the lack of a transparent view for clients to see what's happening behind the scenes.

I do believe that CertifyOS is moving in the right direction. In my view, their licensing service is their strongest point, but they see credentialing as their future direction and want to focus on being brokers with large health payers in order to streamline and expedite the credentialing process for their clients. They hope to eventually become a sort of compact provider for payer credentialing, similar to the Compact license, which makes it easier for physicians to obtain licenses to practice in multiple states. If they can achieve that, it would be a significant strength, but right now, their weakest point is credentialing, particularly for multi-state telehealth practices.

Is their platform bug-free and reliable?

The system is unreliable and full of bugs. For example, they have a feature where they can input action items and ask for updates. However, even if I respond to an action item, the system doesn't notify anyone; users have to specifically check for a response. This makes the system essentially useless, which is why we don't use it.

How do you feel about the account management at CertifyOS?

We have a weekly meeting that includes someone from the credentialing team, someone from the licensing team, and our client manager. The client manager is very thoughtful and kind, and tries to stay on top of things. However, with so many moving pieces, it's impossible for him to keep track of everything.

It almost feels like we're sharing the role of account manager. I reach out to him to remind him of things that were supposed to be sent, done, or updated, and then he checks with the relevant team members and updates me.

Overall, I think CertifyOS has the potential to be a fantastic product, and the people involved are great. However, I don't think they have the necessary support, whether it's in terms of resources or finances, to be able to service a company that needs as much as we do.

Why do you think CertifyOS seems to be struggling specifically with servicing your organization compared to another organization?

My assumption is that a smaller practice that chooses them will have one or two physical locations and a staff of 5–15 providers, a specific number of payers they need to credential with, and so on. The expectations are very clear from the outset in these cases. In contrast, we're constantly adding collaborative positions, providers, locations, addresses, and payers. We have different licensing and credentialing requirements for each state. For many credentialing tasks, there's

additional legal information needed, such as the National Provider Identifier (NPI) for each primary care physician (PC). When there are lots of different states or types of payers involved, I think their current setup isn't adequate to the task.

How do you plan to handle licensing and credentialing going forward?

We will continue to work with them for licensing, as they've proven able to handle that aspect well and at a reasonable cost. It's a more straightforward process, and we feel comfortable with that aspect of it. We now have a better understanding of what information we need to provide them to ensure a smooth credentialing process for the next person we onboard.

For credentialing, we've just spoken with a woman who was recommended by our telehealth attorney. She has extensive experience navigating credentialing for telehealth providers; she has a large team, and our attorney has used her multiple times for his larger telehealth clients, so we've decided to switch to her for the credentialing side.

Do you think you made the right decision by choosing CertifyOS?

I believe we made the right decision for licensing. We have been ambitious in launching this telehealth company in multiple states within a short timeframe, which has resulted in a significant learning process for us. We now have a far better understanding of the intricacies involved, which will benefit us moving forward. While there may have been an easier path, we've certainly gained valuable knowledge about potential pitfalls and the questions to ask in the future. Although it may not have been the most straightforward journey, it hasn't been wasted.

What advice would you give CertifyOS's leadership?

The data dashboard is crucial. In theory, it's a place where users should be able to see which applications are unprocessed, which payer credentialing contracts are in progress, and which items are outstanding. You should then be able to communicate in real time with the person in charge of that action item. Having all the information in one place and being transparent for everyone is essential. They're working on making the dashboard more robust, and if they succeed, it would greatly benefit their service.

For the telehealth credentialing component, I think they should consider hiring additional employees with deep expertise in that specific area.

What advice would you offer to buyers who are in the process of credentialing and licensing or who are dissatisfied with their current provider?

For a straightforward use case, as with a brick-and-mortar practice, CertifyOS would be a good fit; they excel in straightforward cases, and their prices are very reasonable compared to other providers. However, if you have a more complex scenario with obscure requirements or a larger pool of providers needing credentials across multiple locations, they're probably not the best option.