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License Verification Platforms

Vendor Evaluation Checklist

License Verification Platforms: Vendor Evaluation Checklist

This comprehensive guide is for organizations looking to implement a solution for managing licenses, certifications, and registrations (LCRs) for healthcare professionals.

This checklist outlines critical requirements for a license verification platform, including uploading and storing position-specific requirements, handling complex scenarios, and developing configurable automated workflows.

Utilizing this checklist, your organization can ensure they select a robust and efficient solution to manage their healthcare professionals' licensure requirements.

Evaluation Checklist

Defining key requirements

- [ ] Ability to upload/import requirements for each job role and store within the system for reference against applicant and employees licensure.

- [ ] Ability to handle complex scenarios, such as and/or requirements or those where the license/ certification may be obtained at a later date.

- [ ] Automated compliance calculations that all required licensure is in active and good standing.

- [ ] Alerts to designated staff when a caregiver is flagged for not meeting the requirements of his/her position.

- [ ] Access to national and state boards for primary source verification.

- [ ] Adherence to security and data protection standards including HIPAA and SOC 2, Type 2.

- [ ] Secure login capabilities like Single Sign On.

Collecting required credentials from caregivers

- [ ] Provide a platform for caregivers to electronically submit required licenses, certifications, and registrations.

- [ ] Verify the licenses and credentials immediately upon submission or, in instances of photo-submission, allow for a manual review and attestation process.

- [ ] The caregiver credential upload platform is available in both web and mobile applications.

Storage and retrieval of primary source data

- [ ] Solution acts as a central repository for primary source data for the entire organization.

- [ ] Capture a screenshot of the primary source verification as it appears via the primary source website.

- [ ] Provide a date-stamped screenshot to prove when the verification was captured.

- [ ] Proof of verifications are searchable, accessible, and available 24/7/365.

- [ ] Customer support is available to assist when necessary during a regulatory survey.

Verification and ongoing monitoring of licenses and credentials

☐ Provide automated, primary source verification of licensure wherever possible.

☐ Verify against primary sources daily, capturing any changes and relaying the information back to the employer.

☐ Provide manual verification services for licensure where automation is not possible.

☐ Verify & relay the license status.

☐ Verify & relay the expiration date.

☐ Verify & relay any sanctions.

☐ Verify & relay any name discrepancies between the employee record and the primary source.

☐ Verify & track DEA registrations.

☐ Verify & track non-primary source verifiable credentials.

☐ Store all verification data within the system for review by the employer.

Enable Communication Between HR, Supervisors, and Staff

☐ Provide instant, automated email alerts to designated HR representatives and staff when a change in status, expiration date, or disciplinary sanction is captured during the verification process.

☐ Send automated renewal reminders to licensed employees at any frequency determined by the employer up to the license/certification expiration date.

☐ Send automated renewal reminders to supervisors regarding their licensed subordinates at any frequency determined by the employer up to the license/certification expiration date.

☐ Ability to combine users into notification groups based on similar notification and frequency needs.

☐ Ability for the employer to customize the automated messages delivered to supervisors and licensed employees.

Informatics and Reporting

☐ Provide a dashboard for system users with data relevant to them based on factors such as geographical region, department, etc.

☐ Provide a report that shows licenses by status as reported by the primary source.

☐ Provide a report that shows license expiration dates as reported by the primary source.

☐ Provide a report that shows any disciplinary actions detected during verification.

☐ Provide a report that calls out name discrepancies between the system of record and the primary source.

☐ Reports are interactive and workable, allowing for data drill-downs.

☐ Reports have export capabilities.

☐ Provide a mobile application with similar functionality as the reports provided in the desktop solution.

Integrations

☐ Provide a bi-directional integration with the HR system.

☐ Ability to integrate with a scheduling system.

☐ Ability to integrate and securely transfer primary source verification screenshots from the vendor solution to the document management system.

☐ Ability to manage license and credentials collection, verification, storage, and reporting across the entire system, including both applicant and employee data.

Interested in learning more?

Ready to take the next step in purchasing a license verification platform?

See our **Buyer's Guide** for a comprehensive overview of evaluating solutions to streamline and centralize the primary source verification process and continuous monitoring.

The

Ultimate Buyer's Guide to License Verification Solutions
for Healthcare HR

Insights Into Industry Trends, Evaluation Criteria, and Leadership Buy-In

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