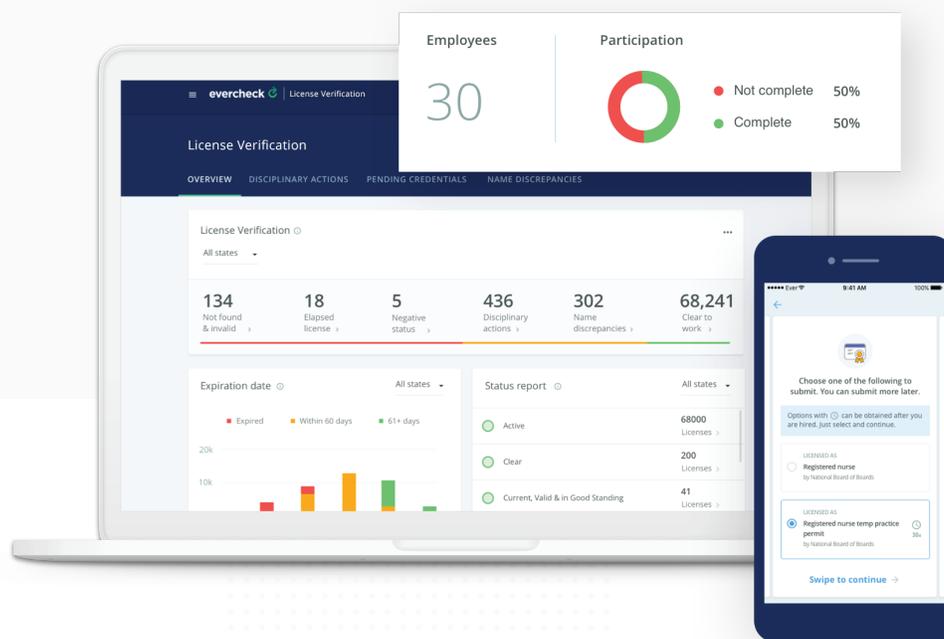




# Adopting a Manageable, Scalable Solution to License Verification with EverCheck



## A comprehensive look inside the EverCheck HR solution

Primary source verification is an essential element of ensuring healthcare professionals are eligible to provide patient care. Until fairly recently, the process of verifying licensure has been a manual one. Today, more and more healthcare organizations are adopting automation as an integral piece of their primary source verification workflow.

EverCheck HR is a sustainable solution to license, certification, and registration verifications and is utilized by more than 350 healthcare organizations across the country. In this document, we'll review how to identify and diagnose shortcomings in your current process and what it means to adopt a manageable solution.

## License Verification: The Basics

In healthcare, primary source verification refers to the verification of an individual's state or federally required license, certification, or registration with the licensing authority or its designated agent. The Joint Commission, a leading accrediting body to health care organizations and programs throughout the US, requires that employers perform primary source verification at hire and at the time the practitioner is scheduled to renew the license. It also requires that the practitioner's license remain in good standing at all times.



The Joint Commission defines primary source verification as *“verification of an individual practitioner’s reported qualifications by the original source or approved agent of that source.”*

At the forefront of all healthcare organizations is patient safety, and primary source verification is one important piece of the puzzle to accomplish this mission. There have been documented incidents where unqualified, unlicensed individuals pose as healthcare professionals. Practicing medicine without a license is illegal in all states, and practitioners can face both criminal and civil penalties for it. Placing the responsibility of license verification in the hands of healthcare organizations who contract with or employ caregivers helps to safeguard the public.

Moreover, it's common industry-practice for healthcare providers to complete continuing education courses as a requisite to renewing their licenses. This ongoing learning helps ensure that patients are receiving high-quality care.

## Traditional Methods of Verification

Primary source verification is commonly a function of Human Resources or other administrative professionals. Traditionally, verifications are performed via a manual license look-up process. Many state boards and other primary sources have electronic databases with license information accessible via a secure website. Others haven't yet migrated to digital infrastructure. In these cases, verification is possible via phone, fax, or written correspondence.

During a regulatory survey, the surveyor may ask for the hospital or facility to provide proof of the verifications performed. In these instances, hospital representatives must provide evidence of the verification for the caregiver, including the dates the verifications took place.

## The Challenges

**TIME** | The most frequently cited challenge to the process of manual license verification is that it's time-consuming. Manually verifying licenses requires the following, at a minimum:

- Pulling a list of expiring licenses
- Verifying each one with their respective boards
- Recording changes
- Notifying managers and employees of soon-to-be-renewed or elapsed licensure
- Updating employee records

Our best estimate based on client feedback is that each verification takes on average around 5 minutes. Compound this with the fact that it's typically the responsibility of highly-skilled individuals on HR and Talent Acquisition teams to manage this process. Whereas these individuals could be focused on high-value initiatives such as talent sourcing, development, and management, their time is underutilized on data collection and processing.

**ACCURACY** | Because license verification is such a time-consuming process, healthcare organizations focus on meeting the minimum requirements set forth by their accrediting agencies - verification at hire and at renewal. The issue, however, is that critical changes that may affect an employee's eligibility to work can happen any time. This can include things like disciplinary sanctions issued by the board, license status changes, and more. If hospitals aren't verifying their caregivers' licensure more frequently, it's possible they may miss these critical changes.

For this reason, we recommend that healthcare organizations verify licensure, at minimum, once per month (with daily as the best practice approach). This helps bridge the compliance gap that happens when verification runs in concurrence with renewal cycles.

**RELIABILITY** | Hospitals and facilities using a decentralized service model for verification can breed unreliable results. Processes, communication, and standards may vary, plus the information may not flow seamlessly between departments, facilities, etc. The lack of standardization presents a challenge for healthcare organizations with multiple hospitals and facilities under its umbrella.

Consolidation is rampant in the healthcare industry, with [more than 60%](#) of community hospitals belonging to a larger health system. The centralized, shared-services model is becoming the new norm, yet waste such as legacy information systems and administrative costs still represent 20% of total healthcare expenditures. The solution to better reliability isn't just in adopting a centralized model; it's adopting a system-wide solution that encompasses every facet of the process—from the verifications themselves to communication and documentation.

# EverCheck HR: A Higher Standard for Verification

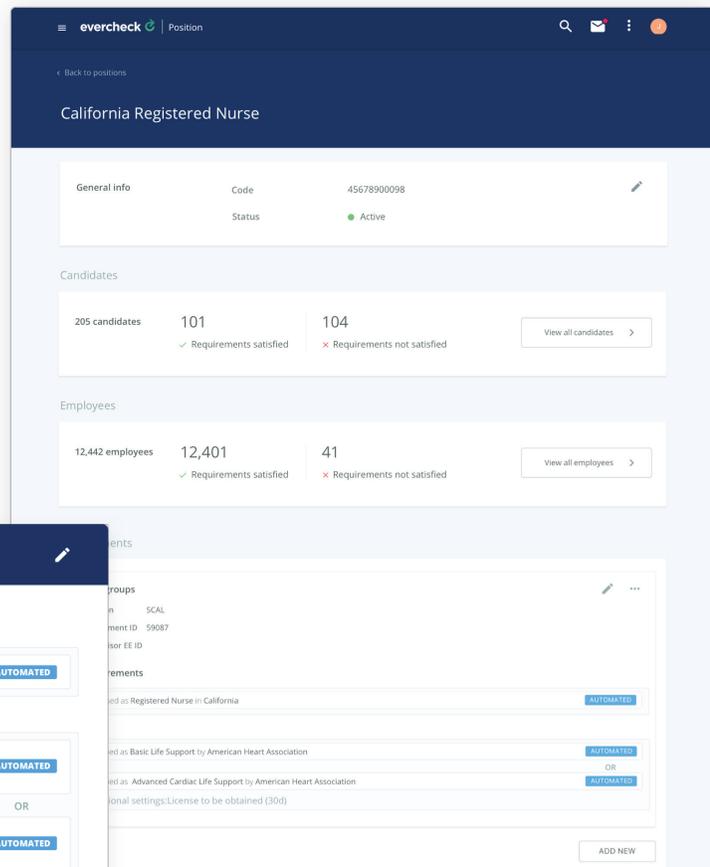
EverCheck HR is the nation’s premier solution for license verification. Trusted by more than 350 healthcare organizations, EverCheck HR verifies licensure for candidates and employees every day, automatically. Our full-lifecycle, daily approach to verification not only meets the standards set forth by The Joint Commission and other regulatory agencies, but exceeds them.

## Setting the stage for license collection and verification

Each position within your organization has a designated set of licenses, certifications, and registrations required for the role.

Position Requirements, an application of the EverCheck HR solution, allows you to designate these requirements within EverCheck. This enables EverCheck to request this required licensure from candidates and employees when needed and to know when a caregiver falls out of compliance.

The Position Requirements app can accommodate both simple and complex requirement sets, for instance, when a position might require a Registered Nurse license or a Temporary Registered Nurse license and an ACLS or a BLS. These and/or scenarios may be combined to accommodate essentially any requirement configuration.



## Daily, automated verification as a low-touch, best practice approach

The HR solution is designed to bridge the gap between you and the primary source. It automatically interfaces with more than 1,000 state licensing authorities and national boards across the country, verifying roughly 5,500 professions daily. This automated interface eliminates the need for HR or Talent Acquisition teams to verify licensure manually; the only intervention required is to review EverCheck's findings.

We operate under the premise that in order to be fully compliant, verification must be performed every day. This ensures that when critical changes happen, employers are notified immediately and may take appropriate action such as removing the employee from the work schedule, if necessary. This proactive approach helps to keep unlicensed/ineligible caregivers off the floor and reduces risk for employers.

When sourcing data from the primary source, our solution identifies and records:

- License statuses
- License expiration dates
- Disciplinary actions (which typically present as a yes/no indicator)
- Name discrepancies

Any time the daily verification process discovers a critical change, we send a system-generated email alert to designated system users. This ensures that logging into the EverCheck system daily isn't required.

As a proactive approach, organizations may also elect to have EverCheck send system-generated renewal reminders to employees and their managers prior to the license renewal deadline. You may select the frequency and language used in the emails.

In addition to licenses and certifications, EverCheck can also monitor:

- Non-primary source credentials, like ACLS and BLS certifications
- DEA registrations
- DMV records\*
- Exclusions (OIG LEIE and GSA's SAM databases)\*

***\*This is an added level of service.***

# System-wide license compliance management

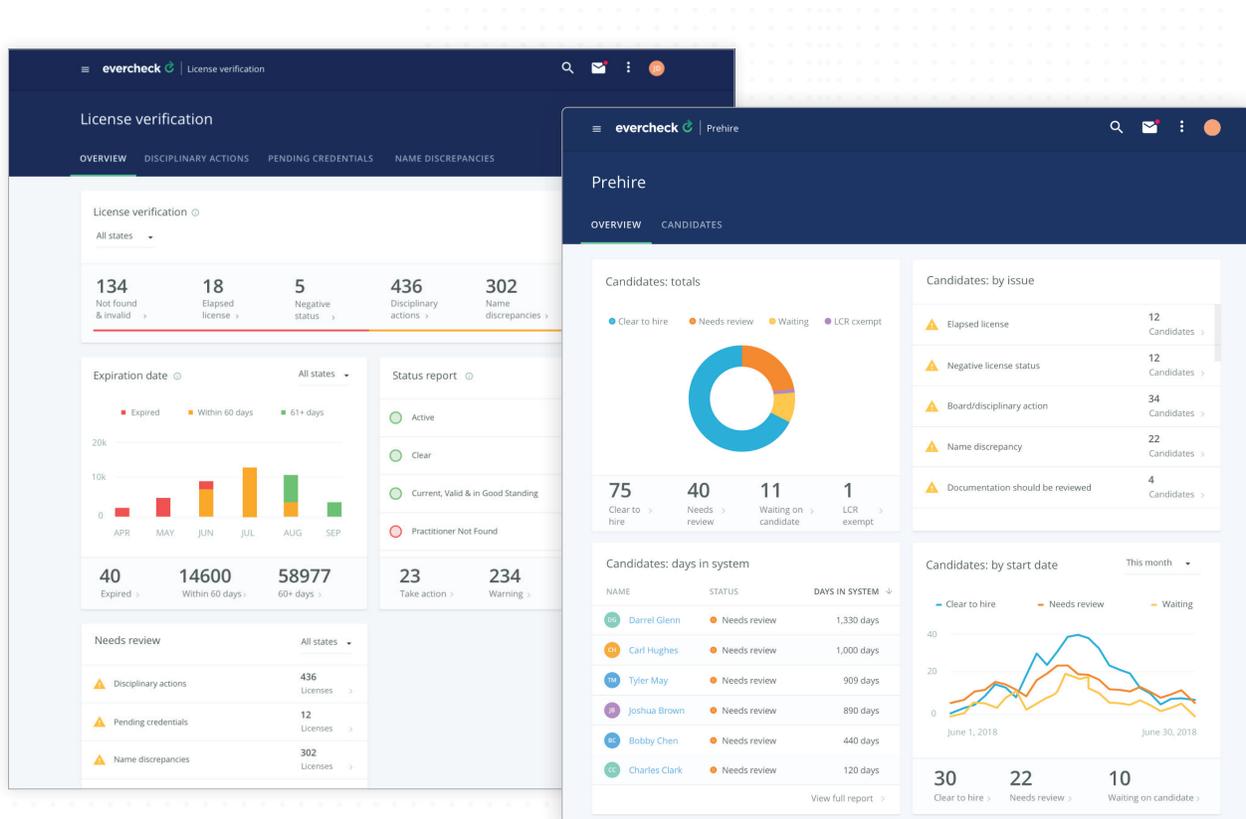
EverCheck delivers a robust, cloud-based platform to manage license compliance. Super users, or what we refer to as “administrative users” can see data for candidates and employees across the entire organization, allowing for streamlined management and insights that are completely unattainable using manual processes.

On the other hand, EverCheck also allows for significant flexibility with regard to user access and permissions. For instance, managers may only see data for their direct reports or facilities. There is also no limit to the number of system users that may access EverCheck.

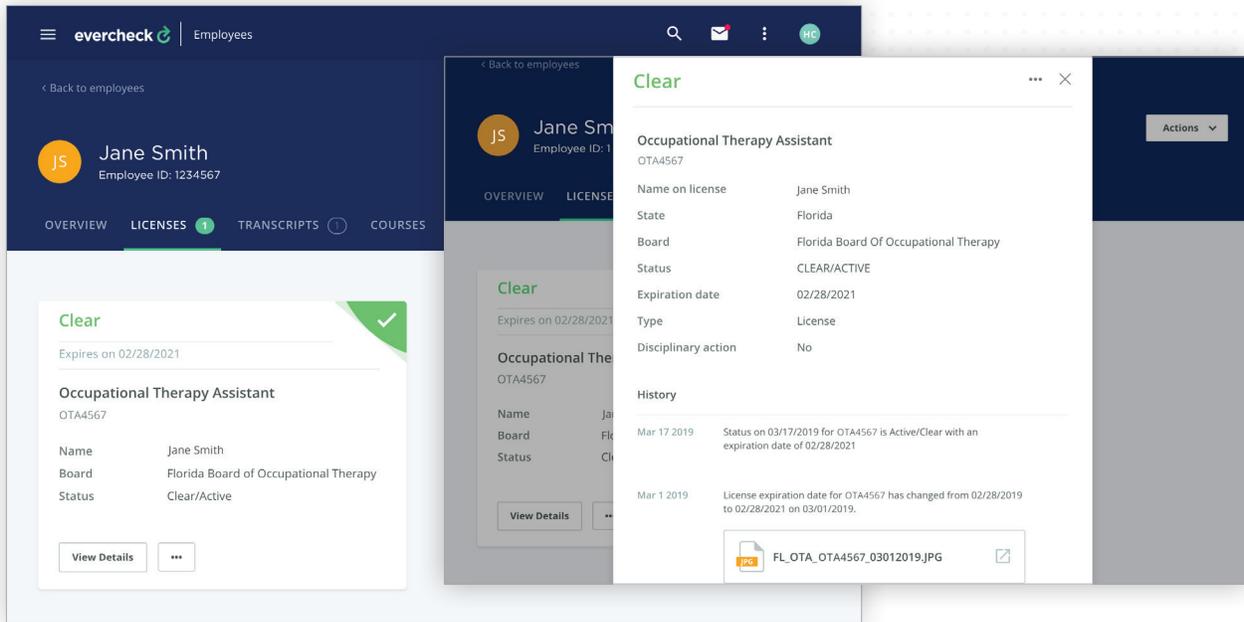
## HERE’S WHAT IT LOOKS LIKE INSIDE THE EVERCHECK HR SOLUTION:

**A comprehensive verification overview** provides users with a license compliance dashboard showing employee license data.. It contains a snapshot of some of the most important information and action items, such as licenses by status, by expiration date, and by issues.

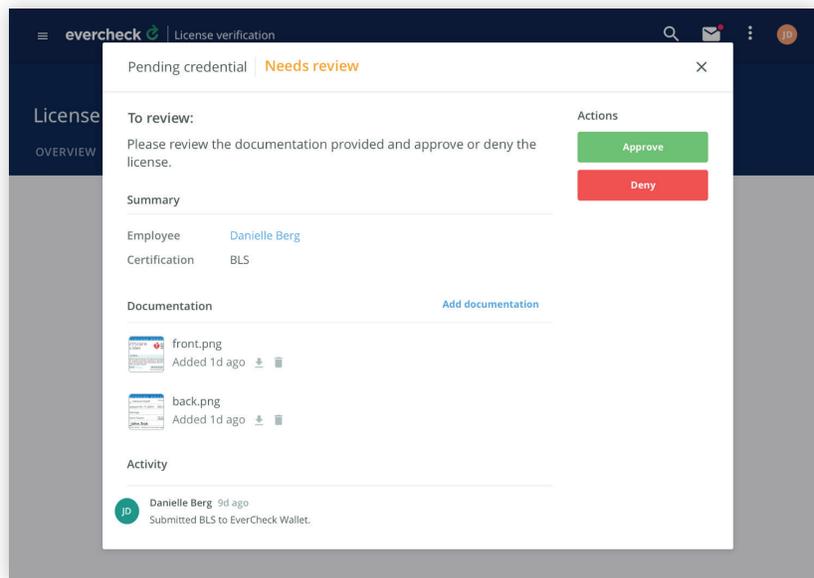
A similar view is available for candidate license compliance within the Prehire application.



**Candidate and employee profiles** house license and certification information, including primary source verification histories and screenshots. EverCheck verifies licensure daily and includes a screenshot in the profiles at least once per month and any time a critical change is discovered. These verification histories are available 24/7/365, and with an uptime of more than 99%, are reliably accessible during a regulatory survey.



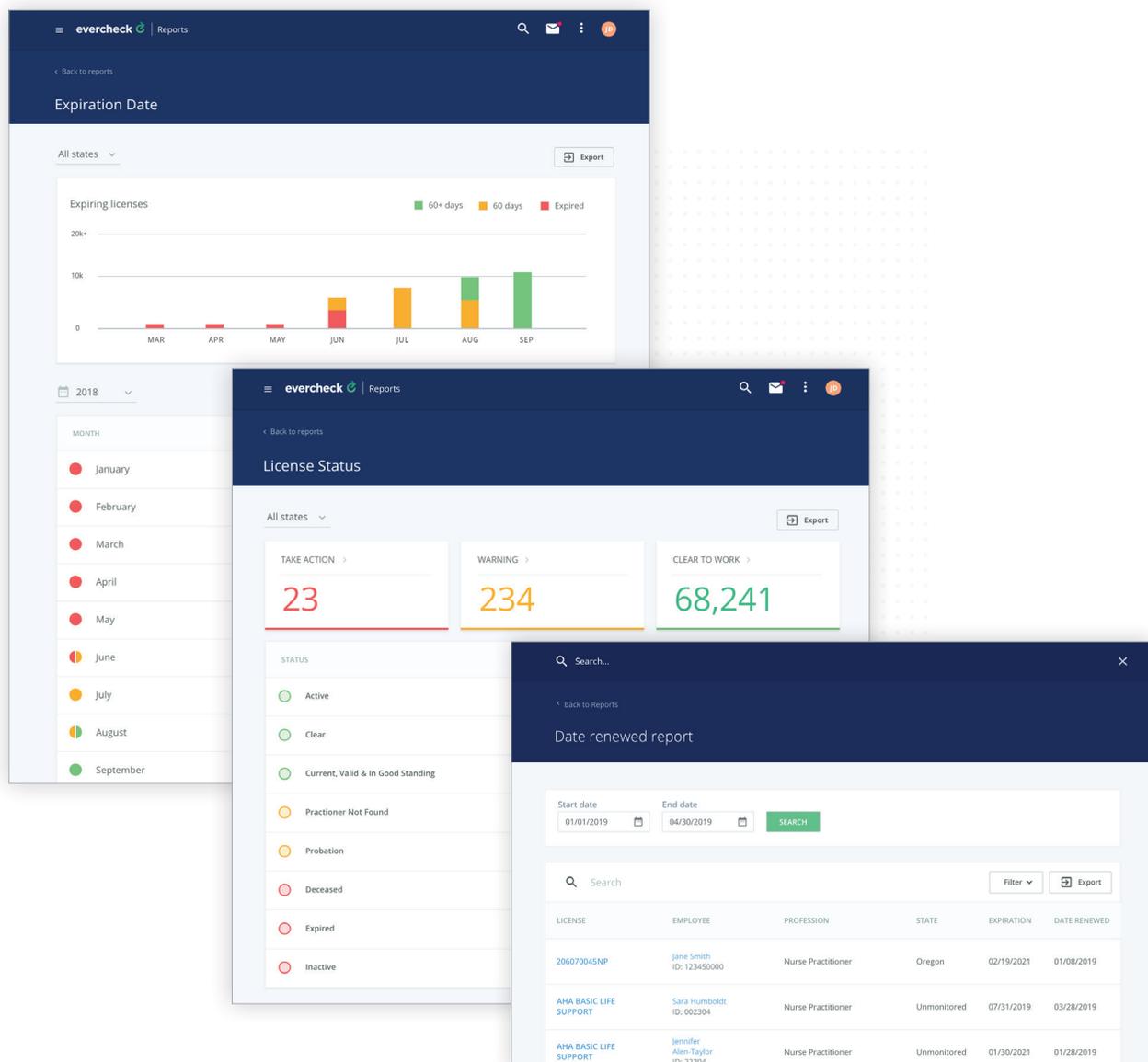
**Workable lists of items that require user review**, like disciplinary actions and name discrepancies, are available as easy-to-navigate workflows within the system. Review EverCheck’s verification findings, perform supplemental research, and mark whether the employee or candidate is clear to work.



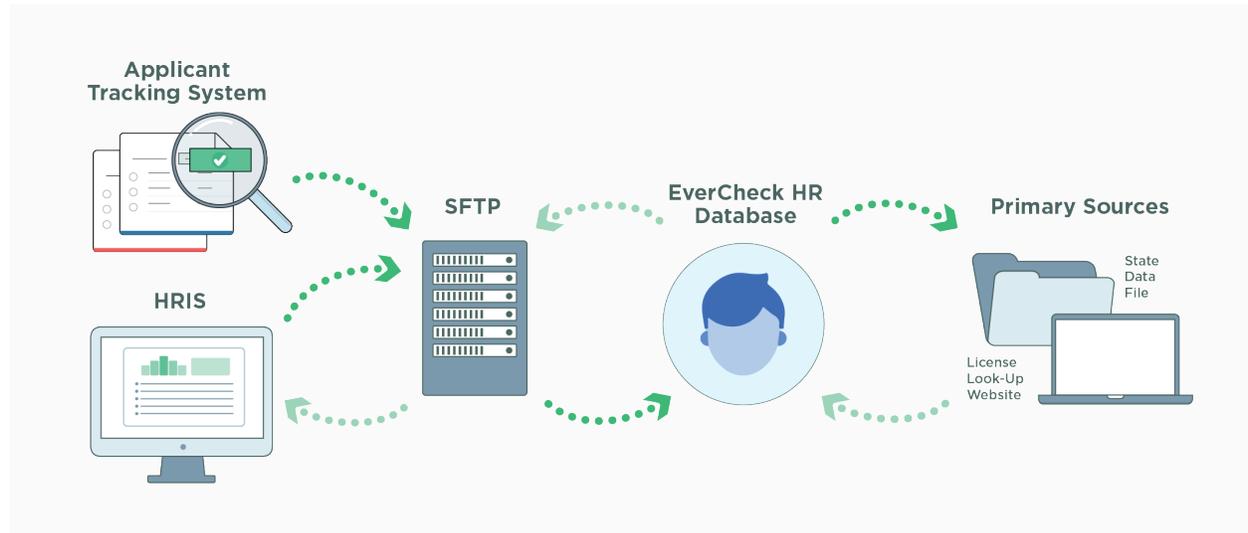
**Robust reporting** allows users to see raw primary source data transformed into actionable insights.

- The License Status Report shows a summary of all licenses by status as reported by the primary source.
- The Expiration Date Report shows a summary-by-month of licenses by expiration date in a 7-month spread.
- The Date Renewed Report allows users to select a date range to see all licenses that renewed within that period of time.

EverCheck’s reports are dynamic and as up-to-date as the primary sources themselves. Additionally, they may be exported for further data manipulation.

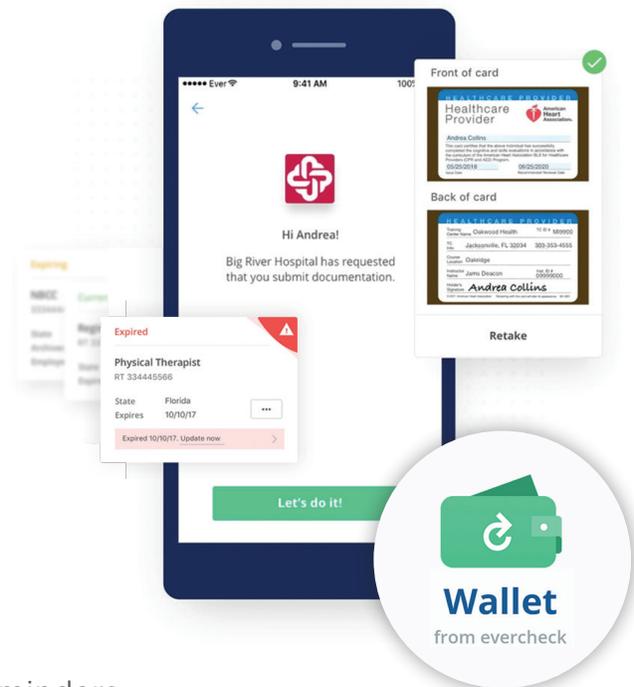


**Seamless integrations** with Applicant Tracking Systems (ATS) and Human Resource Information Systems (HRIS) ensures an effortless flow of data between the systems. The ATS sends us information about which candidates to verify; the HRIS sends information about which employees and licenses to verify; EverCheck sends information back to the HRIS daily, keeping it as up to date as the primary source itself without any manual intervention.



**EverCheck Wallet, an added employee benefit.** EverCheck Wallet is an app designed to empower healthcare professionals to manage their licensure and submit their information to employers who request it. Wallet is available on the web and for iPhone and Android devices. With Wallet, candidates and employees can:

- Manage their licensure in one intuitive platform
- See what information your organization needs and submit everything digitally
- Allow Wallet to help them keep track of expirables with friendly renewal reminders



EverCheck Wallet brings license management into the 21st century for healthcare professionals and is an appreciated benefit to your candidates and employees.

## Before and After EverCheck HR

Let’s take a look at the various functions involved in license compliance and compare what those functions look like before and after EverCheck HR.

FUNCTION	TRADITIONAL VERIFICATION	EVERCHECK HR’S AUTOMATED VERIFICATION SOLUTION
<b>PRE-HIRE LICENSE VERIFICATION</b>		
Collect required licenses, certifications, and registrations from candidates.	Candidate submits credentials via various methods including email, fax, and/or hand-delivery.	Candidate submits the details of their credentials digitally via the EverCheck Wallet app.
Verify a candidate’s qualifications meet or exceed those required for the position.	Cross-reference a list of requirements with the candidate’s qualifications manually.	EverCheck’s position requirements feature automatically requests the required credentials and verifies that the candidate meets the qualifications for the role. A candidate only achieves a “Clear to Hire” status if all requirements are met.
Confirm that the candidate’s licenses, certifications, and registrations are valid and active.	Recruitment and/or onboarding teams manually verify each license with the primary source.	EverCheck automatically verifies each license with the primary source every day until the candidate’s start date.
<b>POST-HIRE LICENSE VERIFICATION</b>		
Determine which licenses require verification.	This data is manually exported from the HR system.	EverCheck automatically retrieves the information via an integration from the HR system.
Perform verification on employee licenses.	HR performs verifications by visiting the primary sources one-by-one for every license at hire and during the corresponding renewal period.	EverCheck verifies all eligible licenses, certifications, and registrations every day, automatically.
Request license updates from employees.	HR sends email communication requesting updates to licenses and certifications.	EverCheck Wallet alerts employees when an update is required to a license or certification on file.

Store a history of the primary source verification performed for documentation purposes.	This documentation is typically printed from the primary source website and stored.	EverCheck captures a digital history of primary source verifications and stores them within its secure, cloud-based infrastructure.
Update the HR system with data retrieved from the primary source.	HR manually keys in important primary source data, like expiration dates.	EverCheck automatically updates the HR system with data directly from the primary source daily.
Send reminders to staff to promote on-time license renewals.	HR determines upcoming license expirations and manually sends reminder emails to staff and managers.	EverCheck sends automated email reminders to licensees and managers. These emails are completely customizable.
Receive notifications when important changes in licensure happen.	HR captures changes during the verification process and notifies appropriate parties.	EverCheck sends system-generated emails to appropriate parties any time the verification process captures a change from the primary source.
See system-wide reporting for license compliance.	System-wide reporting and informatics is typically sparse or non-existent.	EverCheck provides aggregate reporting to show both system-wide and facility-specific trends.
<b>EXCLUSIONS MONITORING</b>		
Identify when an employee or vendor appears on an exclusions list such as the OIG LEIE.	HR or another organization staff member downloads the list and cross-references the list with the organization's employee roster.	EverCheck automatically cross-references the OIG LEIE and GSA's SAM exclusions databases every month and reports any potential matches to the appropriate parties.
Verify that the employee name that appears on the exclusions list does, in fact, work for the organization.	HR must manually verify that the name associated with the excluded individual or entity is the same identity as the employee or vendor.	EverCheck can run a secondary verification using information such as SSN to verify that the match is, in fact, a match.

<b>DMV VERIFICATIONS</b>		
Contact employee to collect information and required authorizations to verify the driver’s license.	HR or the direct supervisor handles required disclosures and manually collects license information from the employee.	EverCheck sends disclosures, requests authorizations, and collects license information from employees automatically.
Run the MVR verification.	HR manually performs the verification either directly or via a 3rd party vendor.	Once required authorizations have been signed and license information is collected, EverCheck automatically verifies the MVR.
Review and document the verification.	HR reviews the MVR results for any accidents, violations, or restrictions and documents the findings manually.	EverCheck sends instant notification if any accidents, violations, or restrictions are discovered during the verification process and keeps the driver’s license as part of the employee’s profile within EverCheck.

# Providence St. Joseph Health + EverCheck: A Case Study in Collaborative Partnership



In 2013, Providence St. Joseph Health (formerly known as Providence Health & Services) selected EverCheck to verify 40,000 licenses across 5 states, including California, Washington, Oregon, Montana, and Alaska. Providence has continued on an impressive growth trajectory and today, EverCheck verifies more than 140,000 licenses for the health system daily.

## TIME FOR CHANGE

Prior to partnering with EverCheck, Providence was verifying 40,000 licenses manually. With the goal of creating more efficient and less time-consuming processes, they began searching for a vendor that could automate the process. Ultimately, it was EverCheck's daily verifications, the flexibility of the system, and the intuitive interface that led Providence to choose EverCheck as a partner.

The implementation spanned the course of three months and was completed in December of 2013. During implementation, EverCheck:

- Audited data for 40,000 licenses.
- Developed a custom interface.
- Developed custom renewal reminders, including setting up managers to receive notifications based on their respective locations and teams.
- Integrated with Providence's system of record, Infor.
- Developed an image-transfer protocol using ImageNow so primary source images could be transferred and stored directly within the system of record.

## TANGIBLE RESULTS

Providence St. Joseph Health has seen a significant reduction in the resources required to perform license verification and remain compliant with The Joint Commission's standards for primary source verification. Today, they subscribe to EverCheck's full-lifecycle solution for both candidate and employee verification, which provides standardized compliance, increased confidence in the integrity of their data, and significant savings in terms of the resources required to manage the process.

## EverCheck HR Pricing

EverCheck offers a subscription-based pricing model to accommodate organizations of all sizes - from small clinics to large health systems and everything in between. EverCheck charges based on the number of candidate and employee profiles within the system; each profile may have an unlimited number of associated licenses and certifications. EverCheck does not charge for system users.

### EverCheck HR + EverCheck Wallet | \$1.00 per profile per month

- ✔ Daily, automated license verification for candidates and employees
- ✔ Non-primary source credentials tracking
- ✔ Robust reporting and data analytics
- ✔ System-generated change notifications
- ✔ System-generated, customizable renewal reminders
- ✔ Unlimited documentation storage
- ✔ Access to EverCheck Wallet for candidates and employees

*\* Implementation fees apply*

### Additional services

- ⊕ Exclusions monitoring | +\$0.10 per monitored employee per month
- ⊕ DMV verifications | \$5.00 per verification + applicable state fees
- ⊕ Manual verifications | \$5.00 per verification + applicable board fees

# Calculating the Return on Investment

As with any software, EverCheck HR is an investment. The important thing to determine is what kind of return you'll see on that investment. Use this worksheet to calculate your organization's potential ROI with EverCheck.

This worksheet does not take into account opportunity costs. For many organizations, the responsibility of license verification falls with the HR team or with direct supervisors. These professionals have expertise and talents that can have a direct and lasting impact on your bottom line. So if they're dedicating their time and resources to manual license verification, it's taking away from more meaningful and productive initiatives they could be focusing on instead.

*\*This worksheet is for illustrative purposes only.*

## First, jot down some basic numbers:

- A \_\_\_\_\_ Number of licensed candidates being processed (on average) and employees
- B \_\_\_\_\_ Total number of licenses/certifications verified (*employees may hold more than one license or certification*)
- C \_\_\_\_\_ Average hourly rate of talent acquisition/HR staff verifying licenses

## Now, let's determine how much time your organizations spends verifying licenses.

- B \_\_\_\_\_ Total number of candidate/employee licenses verified x 5 minutes per verification =
- D \_\_\_\_\_ minutes per month\*
- D \_\_\_\_\_ minutes per month / 60 = E \_\_\_\_\_ hours per month

*\* Your organization should be verifying licenses, at minimum, once per month to avoid any unexpected changes in status that could render a caregiver ineligible to practice.*

## Next, let's determine how much manual license verification is costing your organization.

- E \_\_\_\_\_ hours per month x C \$ \_\_\_\_\_ hourly rate of staff =
- F \$ \_\_\_\_\_ cost per month

## Finally, let's determine how much automation would cost your organization per month.

- A \_\_\_\_\_ number of candidate/employee profiles in EverCheck x \$1.00 =
- G \$ \_\_\_\_\_ cost of automation per month

## Now, compare those two numbers:

- F \_\_\_\_\_ vs G \_\_\_\_\_
- Manual Verification* *Automated Verification*

## Summary

We appreciate you taking the time to get to know EverCheck. We've built our solutions to be comprehensive and a true extension of your team. In fact, many of the features reviewed here have been built in collaboration with our partners. With EverCheck HR, healthcare organizations are able to adopt a low-touch, best practice method for verification.

For additional information and to get started with EverCheck, please contact:

[hello@evercheck.com](mailto:hello@evercheck.com)

