

Interstate Medical Licensure Compact

IMLCC Information Systems

The Evolution-Development-Advancement

Wanda Bowling



In the
Beginning.....

....



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Idea

Commission(ers)

Rules and Statutes

Name: The Interstate Medical Licensure Compact Commission

HRSA



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What next?

Create an infrastructure to align with the agreed upon pathway and in compliance with the statutes, etc.



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OVERARCHING REQUIREMENT

August 2016 Mandate: Must launch by January 2017

KNOWNNS

- The Compact has completed rules and approved moving forward
- There is a need to create automation for the approved business structure
 - ROUTING
 - Application for LOQ
 - Application add state licenses
 - Application to Renew licenses
 - Change of SPL or other information
 - Renewal of LOQ
 - Disciplinary action and reporting
- Training on the systems, process, requirements, rules/statutes, etc.
- There is a need for public education. No one knows who we are and how we serve
- Information collected must be preserved for a future database
- Timeline to move into production is January 2017
- No Budget

Approach

Create a website to house education for the public, licensing staff, and physicians(IMLCC.org)

- ❖ Who is the IMLCC and how do we serve
- ❖ Map of Member States and those that have legislation pending
- ❖ “What is the Process”: to apply, add states, and renewals
- ❖ “Do I Qualify?”: rules to earn an expedited pathway to obtain licenses
- ❖ “What does it Cost”: costs of application, fees, and licenses per board
- ❖ “Support Contacts”: for each state, IMLCC, and IStARS
- ❖ Glossary, FAQs, About, Myths, Facts
- ❖ Compact Bylaws, Rules, Policies, and Advisory Opinions
- ❖ Public meetings and past meeting minutes, Press Releases, News, Publications

Approach

- ❖ Purchase a license with a Document Management system (DocuSign per recommendation of FSMB CIO and others)
- ❖ Create the Application and required documents
- ❖ Configure the documents to collect the required information
- ❖ Research and contract with a payment vendor and route to IMLCC financial institution.
- ❖ Create sources for communication: inquiries-GMAIL Suite
- ❖ Create a launch pad to Apply, Add States, and Renewals
- ❖ Develop business processes and policies
- ❖ Onboard all state license personnel
- ❖ Act as Customer Service for physicians and state licensing personnel

REQUIREMENT FULFILLMENT

August 2016 Mandate: Must launch by January 2017

Successful Pilot 1/30/2017

Delayed due to FBI misunderstanding

Officially launched 4/5/2017



Process

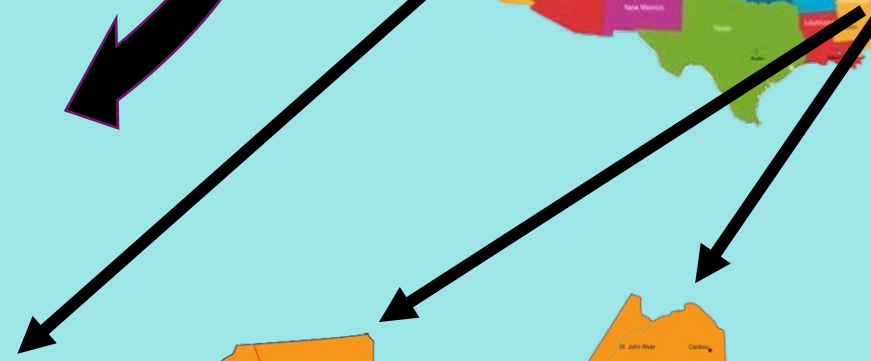
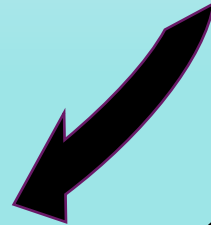
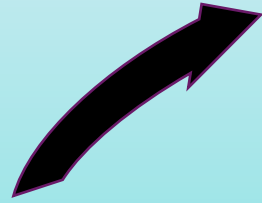
Physician Applies



Letter of Qualification



**365 days to
select more
states**



More infrastructure required after Launch

- Need a financial tool to aggregate reimbursements to State Boards:
- Cease trash data of external individuals(Change payment vendors and process)
- Additional Use Cases
 - ✓ Additional Selection of Licenses after LOQ tool
 - ✓ Renewals tool (Phase I and Phase II)
 - ✓ SPL Redesignation tool
 - ✓ Re-Application tool
- Database tool: Analysis – Business Requirements – RFP Process – Small list assessment – Select tool
- Infrastructure Architectural Best Practice Review: Triaxom Consulting
- Security Review and ongoing support: Triaxom Consulting

IMLCC Database: CRM Tool

- August – December 2017 RFP process for CRM Tool
- October 2017: News of no funds available to pay for Technology or resources
- February 2018: Full Commission Meeting approved MS Dyanmics 365 CRM implementation
- May 2018: Approved Budget for CRM tool
 - \$5,500 for Consulting
 - \$12,500 for development
 - \$7,056 User licenses

Total Technology Budget for 2018-2019 6/30 fiscal year end approved was \$47,000.

Customer Relationship Management Tool Project Life

Analysis and Inception

- **START** - Analysis
- Business Requirements
- “RFP” Process
- Tool Selection
- Consulting Resources

Funding

- Feb 2018 Approval of Project
- May 2018 Approved Funding of Project 6/30/2018
- 7/2018 Design of CRM

CRM Project delayed BREAK FROM PROJECT 8/2018 to 1/2019

- **SPL Redesignation**
- **Re-Application**
- **ARCH and Security RFP**
- **ARCH and Security Review**
- **Renewal Phase III Requirements**

CRM Project resumes

- Design and Code executed
- Testing Complete
- Import History code
- Import History execution
- 4 MBs Pilot
- All MBs Online - **END**



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CRM Tool

Business Issue:

This tool properly houses our data and provides greater visibility to the Member Boards for validation. This was the requirement fulfilled for the CRM project now in production.

This year's enhancements

- Progress reporting
- Sharepoint development to house all documents
- Integration with other tools



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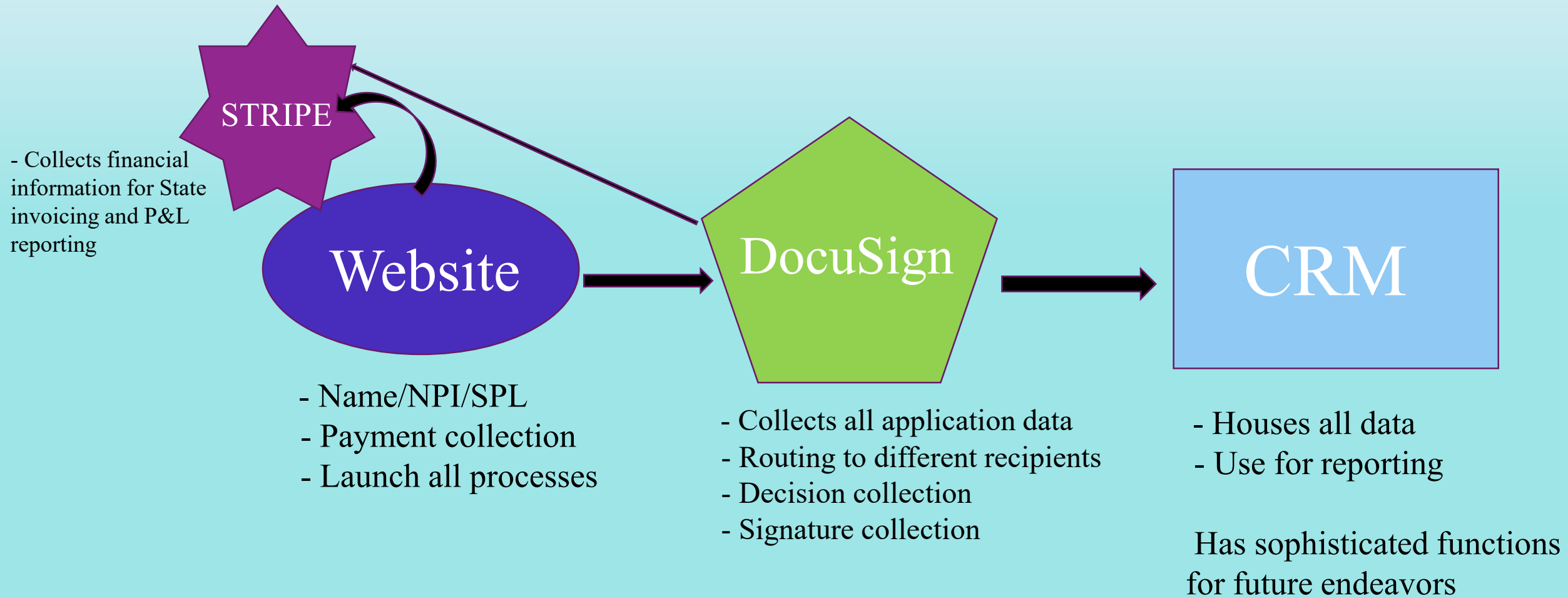
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Website Redesign

CRM Production Demo Presentation



Today's infrastructure





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END HISTORY

QUESTIONS

CURRENT PROJECTS:

- Website Redesign
- Renewal Engine Phase III:
- Interactive Application System inclusive of routing, signature, and integration with CRM
- CRM Tool Development
- Automatic download of data to Member Boards
- Disciplinary Action Alert Tool
- IMLCC Survey tool
- Training infrastructure



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Web Redesign Project

Presenter

Tim Terranova

MAINE BOARD OF LICENSURE IN MEDICINE

Website Redesign

✓ BUSINESS ISSUE:

- Has become a web application that causes overhead and is vulnerable to risk
- Needs some content refresh and our updated communication
- Is cluttered from our additions(application and content) in the last two years
- Information serves several categories of audiences, however the information is not categorized
- Rules information is disparate. A complete explanation of the rule is not in the same place



Website Redesign

✓ SOLUTION:

- Innovative navigation
- A design that assists in the categorizations of our different audiences
- Remove any duplicate menu items
- Incorporate more “white space”
- Consider more graphics and pictures
- Revise the map to illuminate growth
- Refresh content:
 - o Physicians tab
 - o Commissions tab(rules, meetings, etc.)
 - o “What is the Process” tab – less verbiage more step by step
 - o Support Contacts page
 - o Add information for Locum tenens
 - o Change map information for each state
- Consider a search tool



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Website Redesign

PROTO Presentation



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Interactive Application Tool Project

Presenter

Karen Silas

ALABAMA MEDICAL LICENSURE COMMISSION

Interactive Application System

Business Issue:

The IMLCC has grown exponentially to where more validation within the forms and management of the application is required.

While the physician is made to attest they are qualified the physicians will begin an application before they qualify. Once the application is opened there is immediate cost and downstream costs in the event the physician completes the application or not. Costs associated to human error:

- * Some selections of data cannot be corrected once in DocuSign. This may precipitate a request for refund. IMLCC has a rule that all fees are non-refundable
- * Volumes of customer service calls requesting changes after signature. This is a technical constraint.
- * Unfinished application data is sustained and becomes permanent requiring quarterly clean up of unfinished applications via “VOID”
- * Required scrubbing of exported data for voided unfinished applications. The margin of error is wide whether this task is manual or automatic for an export/import from DocuSign to another tool.



Interactive Application System

Future Solution Desired:

The IMLCC has grown and is of sophistication to warrant a POS tool with the flexibility to allow data validating scripts, tables, and multidirectional communication to and from our CRM. This tool must have messaging to prompt a physician to acknowledge rules and guide them in their decision of qualification. It is desired this tool has the ability to integrate tightly with the CRM tool residing on the same HIPAA compliant cloud so the data can flow easily and securely without risk or error.

Project Objectives:

- Deter/decrease refund requests
- Remove the need to clean up trash data
- Decrease risk and unnecessary overhead of exporting data to our CRM tool
- Allow correction of data during the application process
- Increase validation of the qualification process
- Decrease incorrect selections of states
- Decrease costly human error
- Eliminate all web application logic in the IMLCC.org website, however, continue to offer the website as a launchpad for each process.

Product to be delivered:

- One tool that can be public on the frontend and secure in the backend.
- This tool must integrate easily with Microsoft CRM 365 multidirectionally
- Tool that can integrate with other tools(Payment solution and Signature tool)
- Tool that is intelligent enough to achieve our Project Objectives



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Interactive Application System

PROTO Presentation



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Renewal Engine Upgrade Project

Presenter

Jaime Dunbar

IOWA BOARD OF MEDICINE

Renewal Upgrade Phase III

BUSINESS ISSUE:

- The license fee table dynamic (changes).
 - There are Member Boards that change their license fees every month or every six months.
 - Member boards contact physicians 90 days prior to the expiration of their license informing them of the fees due to renew.
 - This requires an administrator to manually change the table of fees in the evening of every last day of the month for the next month's new fee schedule.
- The renewal process is more manual than the initial application process.
 - This process highly depends on the user knowing and understanding each state's renewal details.
 - More than half of the physicians licensed through the IMLC have more than one license to renew.
 - Much of the time the physician is confused by the requirements of each renewal.
 - The manual process leads to a lot of human error.
- The renewal application may not provide all the information needed by some Member Boards in order to renew a license in compliance with individual state statutes.
 - Some Member Boards must contact physicians to request more information.

Renewal Upgrade Phase III

HUMAN ERRORS ENCOUNTERED:

- Physicians often confuse the “state of license to renew” with the “State of Principal License” when selecting from the drop downs in the current application, resulting in an invalid application.
- The physician places the wrong fee amount in the free form text box for the “Renewal Fee”.
- The physician renews outside of the renewal period and the Member Board cannot process the application or accept payment due to their State statutes.
- The physician renews late and does not add in the late fees.
- The physician renews after the renewal period expires and the Member Board cannot accept the renewal in compliance with their statutes.
 - A subsequent process of reinstatement or re-application must occur.
- The physician is not eligible for various reasons or does not understand the requirements to renew.

These issues result in workarounds, refunds, reapplications, and other manual tasks to resolve the mistakes made in the renewal process. This creates a lot of overhead.

Renewal Upgrade Phase III

FUTURE SOLUTION DESIRED:

- Create an engine to dynamically calculate Renewal fees based on the specific rules of each Member Board
 - Some states have prorated renewal fees according to when the license when issued
 - States have different renewal cycles
 - This will eliminate under/overpayment of renewal fees, and eliminate a need for refunds to be processed.
- Request the engine integrate with the CRM tool to validate the physician's state licenses, eligibility, and membership.
 - This will eliminate human error with physicians, including attempting to renew licenses not received via the IMLC pathway.



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Renewal Information

Qualifications

Core Data

Survey

Payment and Sign

APPLICATION FOR RENEWAL OF MEDICAL LICENSE IN AN IMLC MEMBER STATE THROUGH THE IMLC

I attest that I am qualified and eligible to Renew my license through the Compact. Yes No

I understand that inaccurate or missing information may be grounds for rejection of my application.
Please carefully review the [Renewal Application](#) before applying. Yes No

I understand pursuant to IMLC rules, all fees are non refundable. Yes No

**If the physician
answers “no” to any
of these questions,
they are not allowed
to move forward with
the application.**

Next



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APPLICATION FOR RENEWAL OF MEDICAL LICENSE IN AN IMLC MEMBER STATE THROUGH THE IMLC

Physician's National Provider Identifier Number _____

Date of Birth: _____

Has your named changed since receiving your license

Current Full Legal Name _____

First	Middle	Last	Suffix(Sr., Jr.)
-------	--------	------	------------------

State of Renewal

Please Select a State ▼

License # _____ Renewal Cost \$ _____

Last 4 digits of SS# or ITIN

WASHINGTON BOARD OF MEDICINE: An allopathic physician and surgeon will renew their license on or before their birthday and it will be valid for 2 years. They can renew up to 90 days prior to their expiration date. The current renewal fee is \$657.00. There is no grace period. If they do not renew by 11:59pm on their birthday (renewal date) they must pay the additional late fee of \$262.50 for a total payment of \$919.50. the option for a late renewal is valid for up to 2 years after their expiration date. If the license has been expired more than 2 years they will be required to complete a reactivation application separate from the Compact and pay the fees that are associated with that reactivation application.

Ask about IMPORTANT NOTE:

I understand the statutes and regulations related to the Renewal of my license. I attest that I am in compliance with these rules.

Yes

No

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I have maintained a full and unrestricted license in my State of Principal License(primary state of LOQ) Yes No

Please select your SPL

License # _____

If you have not maintained your SPL you must Redesignate a state as a qualified SPL and obtain approval before you renew any licenses.

Expiration _____

AND at least one of the qualifiers below applies(Please select all that apply)

a. Your primary residence is in the SPL(State of Principal License)

b. At least 25% of your practice of medicine occurs in the SPL

c. Your employer is located in the SPL

d. You use the SPL as your state of residence for U.S. federal income tax purposes

Please provide below information:

Residence Street address _____

Residence City State Zip _____, _____, _____ County _____
City St Zip

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Have you been convicted, received adjudication, community supervision, or deferred disposition for any offense by a court of appropriate jurisdiction?  Yes No

Have you held a license authorizing the practice of medicine subjected to discipline by a licensing agency in any state, federal or foreign jurisdiction, excluding any action related to non-payment of fees related to a license?  Yes No

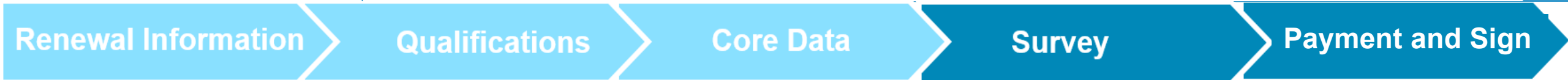
Have you had a controlled substance license or permit suspended or revoked by a state or the United States Drug Enforcement Administration?  Yes No

If the physician answers “yes” to any of these questions, they are not allowed to move forward with the application.



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PHYSICIAN'S CORE DATA SHEET

To avoid delay or rejection you must provide accurate information.

Personal email address _____

Residence address _____
Mailing address City State(XX) Zip

Office address _____
Office address City State(XX) Zip

Where do you wish to receive mail. Residential Office

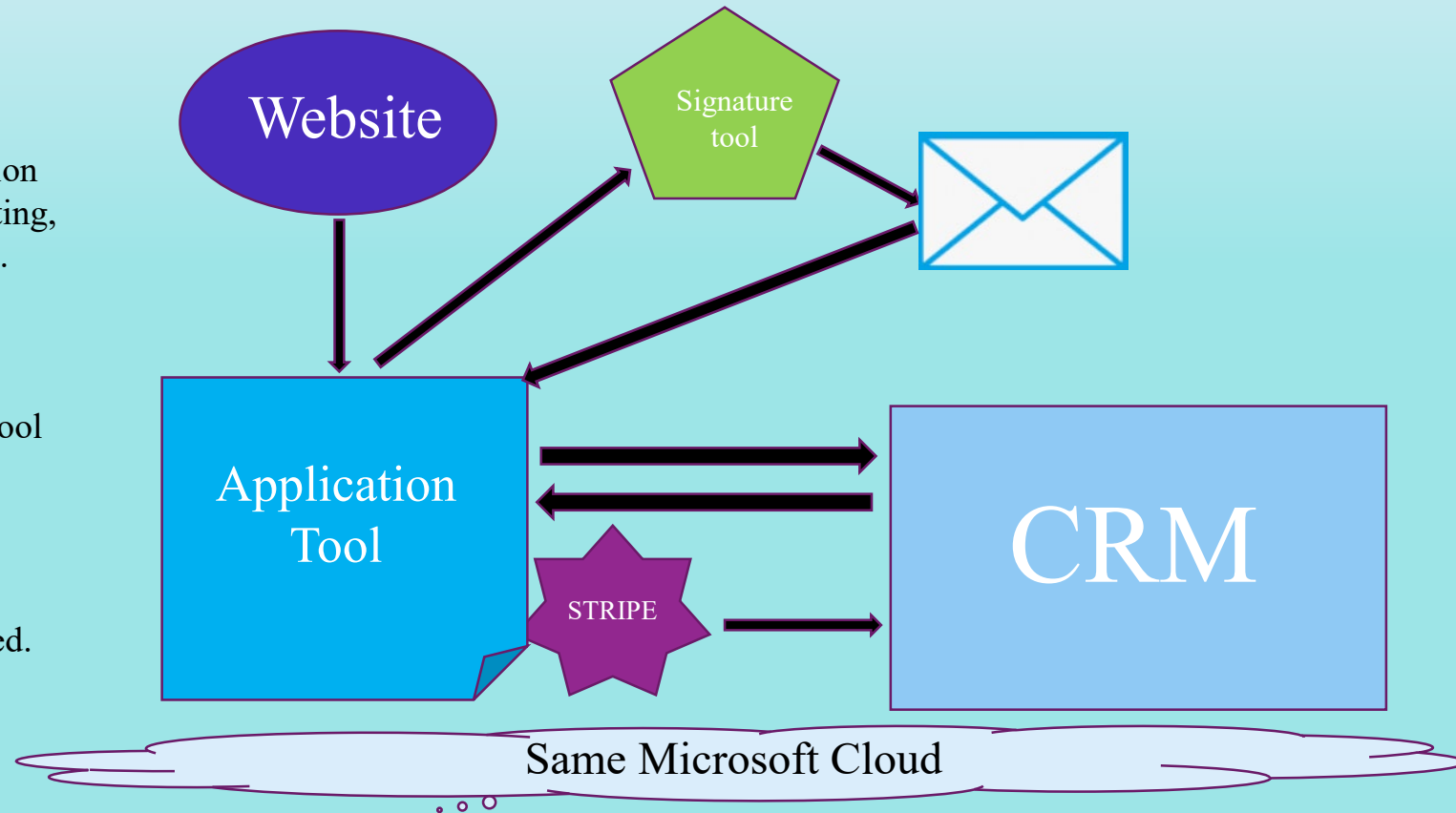
Personal cell number _____
(###-###-####)

Physician's office or practice telephone number of public record _____
(###-###-####)

THE NEW ENVIRONMENT

Tools change roles:

- Website: serves as launchpad only
- Stripe: Collects financial information for State invoicing and P&L reporting, but sends directly to the CRM tool.
- Signature tool only.
- Forms tool functions as our main tool for information collection.
- CRM houses all information
- CRM and Forms Tool are integrated.





Progress Report and Budget

PROJECT PHASES

Project Description	INITIATION GATE	Business Requirements	RFP	Design	Developent	Testing	Training	Deployment
CRM Tool								
Web Redesign					HERE			
Application Tool			HERE					
Renewal Upgrade			HERE					
Survey Tool			HERE					
Discipline Conservatory		HERE						
Data Delivery to Boards		HERE						



Other Project this fiscal year

- ❖ IMLCC Survey Tool: Tool to measure how well the IMLCC has fulfilled their mission.
This tool will be developed on the Interactive Application tool and is in progress(Requirements complete).

OTHER PROJECT NOT INITIATED YET:

- ❖ Automatic download of data to Member Boards
- ❖ Disciplinary Action Alert Tool



Training Infrastructure: THE SUMMIT

Conference to be schedule for the Spring of 2020 for all Member Boards licensing staff

The purpose of the Summit:

- Live training on the new products.
- Train and discuss the appropriate minimum standards of Application verification.
- Training on rules, policies, and determine what needs to be escalated for written clarification.
- Discuss current processes and express ideas for enhancements(technology and process)
- Decide the best approach to ongoing training, frequency, and onboarding.

STATUS:

- Formulated a Summit team of licensing staff: We have had our first meeting and are moving forward in planning.
 - Established values and goals for this meeting
 - Establish the rules of engagement
 - Determine the Agenda
 - Make decisions on some of the logistics.
- Formulated the logistical requirements:
 - Hotel where attendees can walk to different places for dinner
 - Affordability: Room charge, Conference room, breakfast and lunch, AV equipment and consultant
- Quotes have been sent out to two separate locations. Negotiations are in progress



Mature Planning: Project Pipeline

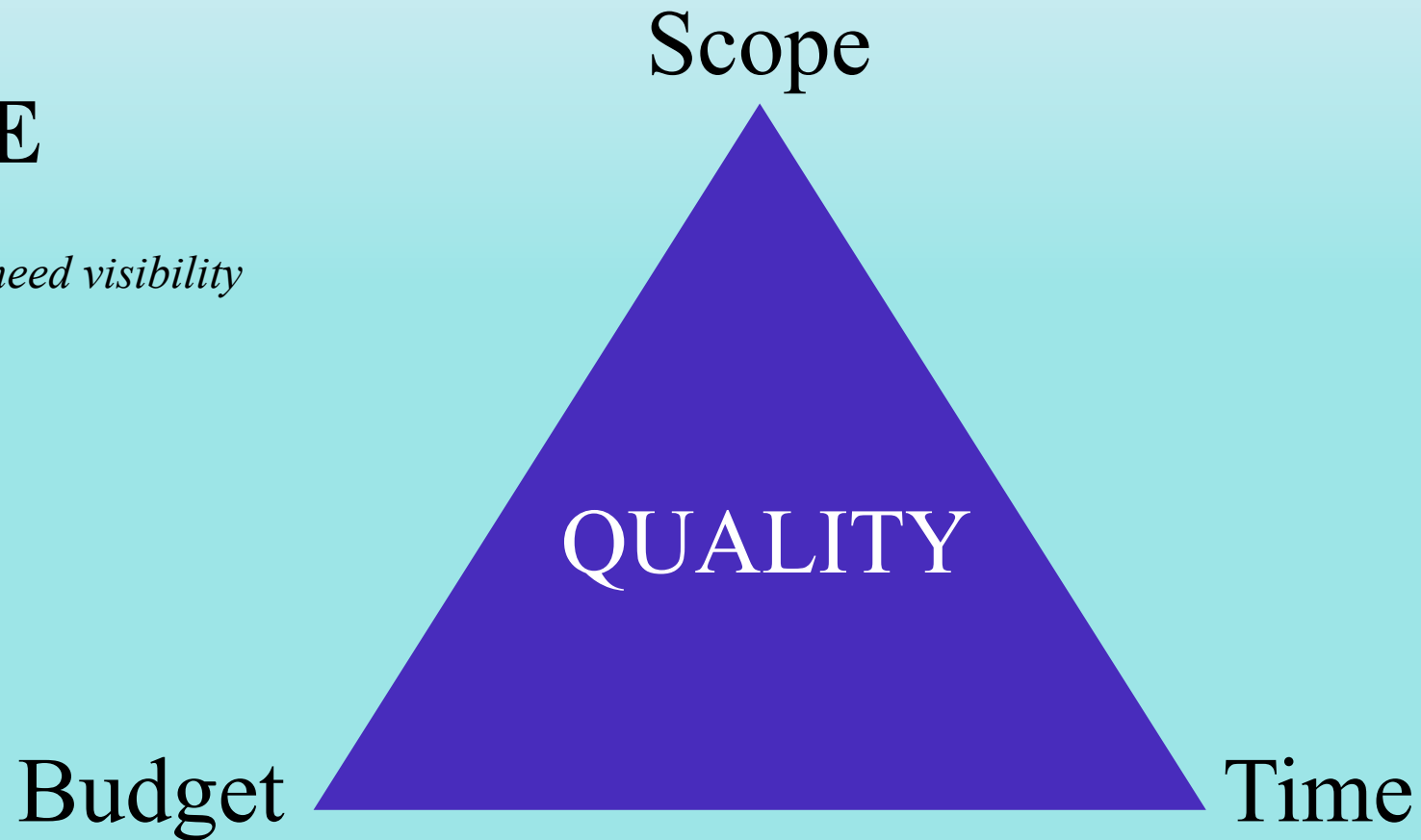
Phases of Initiation

	Idea	Idea Approval	Hi-Level BR	Technical Assessment	Official Size	Priority	Budget	Pipeline
Who	Anyone	Technology Committee	Business Team	Technical Team	Technology Committee	Business Team	Executive Committee	Technology Committee
What is the task	Express enhancement or need	Determine the value and benefit	Create a business charter of hi-level requirements	Create a hi-level technical approach with an estimate of hours	Calculate small, medium or large	Where to place on our roadmap	Approval	Schedule maintenance

Approach to urgent initiatives with analysis yet to be completed

PROJECT TRIANGLE

Stakeholders need visibility





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Current Projects

QUESTIONS

Recommendations of Future Technology

In growing out of our “starter business” shoes the following tools are beginning to be urgent needs to assist us in our daily transactions.

- Enhancements to:
 - CRM tool – Reporting, Dashboard development, Workflow status
 - Application tool – project completion and learned improvements
 - Renewal Engine – additional validation scripts for accuracy
- A Business Intelligence tool: reporting tool and creation of needed reports
- Create Test environments for the CRM tool, Application tool, and IMLCC Website(complete dual environments)
- Portal development for Physicians and Member Board auto-download of information, reporting, and communication.
- SharePoint tool development for physician documents(applications and other)
- Partition in our website for a secured licensing staff forum(Q & A) with notifications

- Accounting tool: starter modules listed below
 - General Ledger
 - Accounts Payable: two entities (1) IMLCC expenses, (2) MB reimbursements
 - Accounts Receivable: physician payments to feed into (2) A/P
 - Budget
 - Forecasting
 - Bank Reconciliation
 - Base reporting of P&L, Trial Balance, and Balance Sheet
 - Interfaces built from Stripe, CRM, and the Application tool.

- Support resource and tool:
 - Triage
 - Debug/Diagnose
 - Fix: notification
 - Test
 - Close

- Resource: Technology Lead

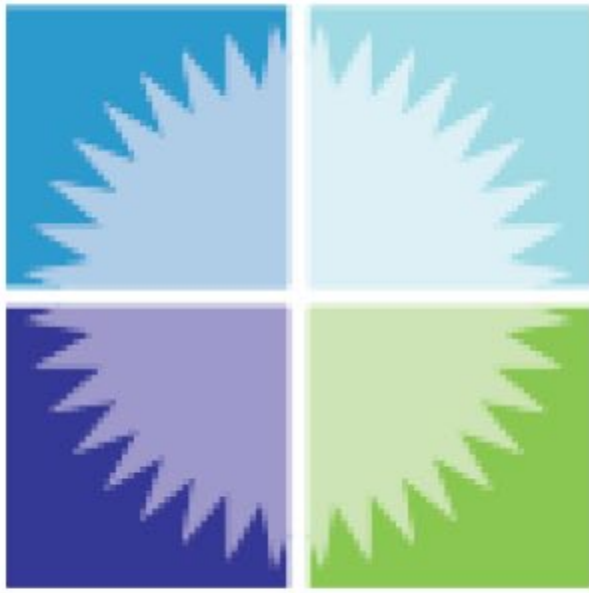


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Future Projects

QUESTIONS



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Thank You