

Patient-Centered Medical Home (PCMH) NCQA PCMH 2014 Corporate Credit Transition



This document contains information for practices recognized under PCMH 2014. It shows what credit earned from the PCMH 2014 corporate survey tool can be used to earn recognition at an accelerated pace under the current NCQA PCMH program.

Overview

Multi-site organizations that completed a PCMH 2014 corporate survey tool may use this table to transition to the current NCQA PCMH program. Practices can use credit earned from the PCMH 2014 corporate survey tool to earn recognition for their practices at an accelerated pace. These practices will be able to use attestation to meet certain criteria without providing the evidence required of practices seeking recognition for the first time.

In the tables below, the “Eligible for Attestation of Shared Credit?” (far right column) indicates which criteria simply allow attestation in lieu of submission of evidence. The evaluator may ask practices to verify a selection of attestation responses during a virtual review.

To get started, enroll through the Q-PASS system at qpass.ncqa.org. You will be assigned an NCQA representative who will be your single point of contact and guide your organization through the recognition process.

What is expected for criteria that aligns with a factor in a PCMH 2014 corporate eligible element that your organization has met using a corporate survey where attestation is allowed?

For criteria marked “attestation,” your organization may attest that they have already demonstrated and met the equivalent criteria in their previous PCMH 2014 corporate survey and that practices are still performing PCMH activities in these criteria. You will not need to demonstrate documentation or evidence. For each attestable criterion, practices enter a title into the text box, label the name as *PCMH 2014 Corporate Eligible Attestation*, and enter the text below:

“Our organization has achieved credit for this criterion using the PCMH 2014 corporate survey. We attest that our responses reflect our organization’s current operations. Documentation to support these responses will be provided upon request.”

You will not need to manually enter the attestation text for each criterion. After you enter the Attestation for the first criterion, you may select “Link Evidence” and type the title *PCMH 2014 Corporate Eligible Attestation* into the text box for additional attestable criterion.

What is expected for criteria that require evidence?

For criteria that is not eligible for Attestation, practices should follow the current PCMH Standards & Guidelines and submit evidence in Q-PASS, as indicated. Practices should prepare to demonstrate virtual review-eligible evidence during the virtual review.

What if my organization has practices that are PCMH 2014, Level 3?

Practices that have achieved PCMH 2014 Level 3 recognition may bypass submission of evidence for criteria entirely and go directly to the Annual Reporting phase of recognition. Do this by enrolling in Q-PASS. You will be assigned an NCQA representative, who will explain the next steps.

What is the difference between shared and site-specific evidence??

Some evidence (such as documented processes and demonstration of capability) may be submitted once for all sites or site groups. Other evidence (such as evidence of implementation, examples, reports, Record Review Workbooks and Quality Improvement Workbooks) must be site-specific. Site-specific data may be collected and submitted once on behalf

PCMH 2014 Corporate Credit Transition



of all sites or site groups if the evidence is stratified by site. Some criteria require a combination of shared and site-specific evidence, which is labeled “Partially Shared” in the tables below and indicates that the documented process may be shared across all practice sites, but all other evidence must be site-specific.

| | Core | Electives | | | Total Criteria |
|-------------------------------------------------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------|--------------------------------------|
| | | 1 Credit | 2 Credits | 3 Credits | |
| Shared (Eligible for Attestation of Shared Credit) | 20 criteria (4 criteria) | 21 criteria (7 criteria) | 15 criteria (4 criteria) | 1 criterion (1 criterion) | 57 criteria (16 criteria) |
| Partially Shared | 6 criteria | 8 Criteria | 1 criteria | 0 criteria | 15 criteria |
| Site-Specific | 14 criteria | 9 criteria | 5 criteria | 0 criteria | 28 criteria |
| Total Criteria | 40 criteria | 38 criteria | 21 criteria | 1 criterion | 100 criteria |

| TEAM-BASED CARE AND PRACTICE ORGANIZATION (TC) | | | |
|---------------------------------------------------------------------|----------------------------------------------------|--------------------------|--------------------------------------------|
| Criteria | Criteria Title | Shared or Site-Specific? | Eligible for Attestation of Shared Credit? |
| Competency A: Practice Organization, Team Roles and Training | | | |
| TC 01* (Core) | PCMH Transformation Leads | Shared | |
| TC 02 (Core) | Structure & Staff Responsibilities | Shared | |
| TC 03* (1 Credit) | External PCMH Collaborations | Shared | |
| TC 04* (2 Credits) | Patient/Family/Caregiver Involvement in Governance | Shared | |
| TC 05 (2 Credits) | Certified EHR System | Shared | ✓ |
| Competency B: Care Team Communication and Functioning | | | |
| TC 06 (Core) | Individual Patient Care Meetings/Communication | Partially Shared** | |
| TC 07 (Core) | Staff Involvement in Quality Improvement | Shared | |
| TC 08* (2 Credits) | Behavioral Health Care Manager | Shared | |
| Competency C: Patient/Family/Caregiver Orientation | | | |
| TC 09 (Core) | Medical Home Information | Shared | ✓ |

*New criteria in 2017 edition of PCMH Standards & Guidelines.

**Documented processes may be shared, but all other evidence must be site-specific.

| KNOWING AND MANAGING YOUR PATIENTS (KM) | | | |
|-----------------------------------------------------------------|---------------------------------------|--------------------------|--------------------------------------------|
| Criteria | Criteria Title | Shared or Site-Specific? | Eligible for Attestation of Shared Credit? |
| Competency A: Comprehensive Patient/Population Knowledge | | | |
| KM 01 (Core) | Problem Lists | Site-Specific | |
| KM 02 (Core) <i>*F and G are new</i> | Comprehensive Health Assessment | Shared | |
| KM 03 (Core) | Depression Screening | Shared | |
| KM 04* (1 Credit) | Behavioral Health Screenings | Shared | |
| KM 05* (1 Credit) | Oral Health Assessment & Services | Shared | |
| KM 06 (1 Credit) | Predominant Conditions & Concerns | Shared | |
| KM 07* (2 Credits) | Social Determinants of Health | Site-Specific | |
| KM 08* (1 Credit) | Patient Materials | Shared | |
| Competency B: Cultural Competency | | | |
| KM 09 (Core) | Diversity | Site-Specific | |
| KM 10 (Core) | Language | Site-Specific | |
| KM 11 (1 Credit) <i>*A and C are new</i> | Population Needs | Shared | |
| Competency C: Proactive Population Management | | | |
| KM 12 (Core) | Proactive Reminders | Shared | ✓ |
| KM 13* (2 Credits) | Excellence in Performance | Site-Specific | |
| Competency D: Medication Management | | | |
| KM 14 (Core) | Medication Reconciliation | Site-Specific | |
| KM 15 (Core) | Medication Lists | Site-Specific | |
| KM 16 (1 Credit) | New Prescription Education | Site-Specific | |
| KM 17 (1 Credit) | Medication Responses & Barriers | Site-Specific | |
| KM 18* (1 Credit) | Controlled Substance Database Review | Shared | |
| KM 19* (2 Credits) | Prescription Claims Data | Shared | |
| Competency E: Evidence-Based Decision Support | | | |
| KM 20 (Core) | Clinical Decision Support | Shared | ✓ |
| Competency F: Community Resources | | | |
| KM 21* (Core) | Community Resource Needs | Shared | |
| KM 22 (1 Credit) | Access to Educational Resources | Shared | ✓ |
| KM 23* (1 Credit) | Oral Health Education | Shared | |
| KM 24 (1 Credit) | Shared Decision-Making Aids | Shared | ✓ |
| KM 25* (1 Credit) | School/Intervention Agency Engagement | Shared | |
| KM 26 (1 Credit) | Community Resource List | Shared | ✓ |
| KM 27 (1 Credit) | Community Resource Assessment | Shared | ✓ |
| KM 28* (2 Credits) | Case Conferences | Shared | |

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**Documented processes may be shared, but all other evidence must be site-specific.

| PATIENT-CENTERED ACCESS AND CONTINUITY (AC) | | | |
|-----------------------------------------------------------------|------------------------------------------|--------------------------|--------------------------------------------|
| Criteria | Criteria Title | Shared or Site-Specific? | Eligible for Attestation of Shared Credit? |
| Competency A: Access to Clinical Advice and Appointments | | | |
| AC 01* (Core) | Access Needs & Preferences | Partially Shared** | |
| AC 02 (Core) | Same-Day Appointments | Partially Shared** | |
| AC 03 (Core) | Appointments Outside Business Hours | Shared | |
| AC 04 (Core) | Timely Clinical Advice by Telephone | Shared | ✓ |
| AC 05 (Core) | Clinical Advice Documentation | Shared | |
| AC 06 (1 Credit) | Alternative Appointments | Partially Shared** | |
| AC 07 (1 Credit) | Electronic Patient Requests | Shared | ✓ |
| AC 08 (1 Credit) | Two-Way Electronic Communication | Shared | ✓ |
| AC 09* (1 Credit) | Equity of Access | Site-Specific | |
| Competency B: Care Continuity and Empanelment | | | |
| AC 10 (Core) | Personal Clinician Selection | Shared | |
| AC 11 (Core) | Patient Visits with Clinician/Team | Site-Specific | |
| AC 12 (2 Credits) | Continuity of Medical Record Information | Shared | ✓ |
| AC 13* (1 Credit) | Panel Size Review & Management | Partially Shared** | |
| AC 14* (1 Credit) | External Panel Review & Reconciliation | Partially Shared** | |

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**Documented processes may be shared, but all other evidence must be site-specific.

| CARE MANAGEMENT AND SUPPORT (CM) | | | |
|-----------------------------------------------------------|-------------------------------------------|-------------------------------|--------------------------------------------|
| Criteria | Criteria Title | Shared or Site-Specific? | Eligible for Attestation of Shared Credit? |
| Competency A: At-Risk Patients for Care Management | | | |
| CM 01 (Core) | Identifying Patients for Care Management | Shared | |
| CM 02 (Core) | Monitoring Patients for Care Management | Site-Specific | |
| CM 03* (2 Credits) | Comprehensive Risk-Stratification Process | Shared | |
| Competency B: Care Planning | | | |
| CM 04 (Core) | Person-Centered Care Plans | Shared- Patient Examples Only | |
| CM 05 (Core) | Written Care Plans | Shared- Patient Examples Only | |
| CM 06 (1 Credit) | Patient Preferences & Goals | Shared- Patient Examples Only | |
| CM 07 (1 Credit) | Patient Barriers to Goals | Shared- Patient Examples Only | |
| CM 08 (1 Credit) | Self-Management Plans | Shared- Patient Examples Only | |
| CM 09* (1 Credit) | Care Plan Integration | Shared | |

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**Documented processes may be shared, but all other evidence must be site-specific.

| CARE COORDINATION AND CARE TRANSITIONS (CC) | | | |
|------------------------------------------------------|--------------------------------------------------|--------------------------|--------------------------------------------|
| Criteria | Criteria Title | Shared or Site-Specific? | Eligible for Attestation of Shared Credit? |
| Competency A: Lab and Imaging Test Management | | | |
| CC 01 (Core) | Lab & Imaging Test Management | Shared | |
| CC 02 (1 Credit) | Newborn Screenings | Shared | |
| CC 03* (2 Credits) | Appropriate Use for Labs & Imaging | Shared | |
| Competency B: Patient Referral Management | | | |
| CC 04 (Core) | Referral Management | Shared | |
| CC 05* (2 Credits) | Appropriate Referrals | Shared | |
| CC 06* (1 Credit) | Commonly Used Specialists Identification | Site-Specific | |
| CC 07 (2 Credits) | Performance Information for Specialist Referrals | Shared | ✓ |
| CC 08 (1 Credit) | Specialist Referral Expectations | Shared | ✓ |
| CC 09 (2 Credits) | Behavioral Health Referral Expectations | Shared | ✓ |
| CC 10 (2 Credits) | Behavioral Health Integration | Shared | |
| CC 11* (1 Credit) | Referral Monitoring | Partially Shared** | |
| CC 12 (1 Credit) | Co-Management Arrangements | Site-Specific | |
| CC 13* (2 Credits) | Treatment Options & Costs | Partially Shared** | |
| Competency C: Coordinate Care Transitions | | | |
| CC 14 (Core) | Identifying Unplanned Hospital & ED Visits | Shared | |
| CC 15 (Core) | Sharing Clinical Information | Shared | |
| CC 16 (Core) | Post-Hospital/ED Visit Follow-Up | Shared | |
| CC 17* (1 Credit) | Acute Care After Hours Coordination | Partially Shared** | |
| CC 18 (1 Credit) | Information Exchange during Hospitalization | Shared | |
| CC 19 (1 Credit) | Patient Discharge Summaries | Shared | |
| CC 20 (1 Credit) | Care Plan Collaboration for Practice Transitions | Site-Specific | |
| CC 21 (Maximum 3 Credits) | External Electronic Exchange of Information | Shared | ✓ CC 21C Only+ |

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| PERFORMANCE MEASUREMENT AND QUALITY IMPROVEMENT (QI) | | | |
|------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------|--------------------------------------------|
| Criteria | Criteria Title | Shared or Site-Specific? | Eligible for Attestation of Shared Credit? |
| Competency A: Performance Measurement | | | |
| QI 01 (Core) <i>*D is New</i> | Clinical Quality Measures | Site-Specific | |
| QI 02 (Core) | Resource Stewardship Measures | Site-Specific | |
| QI 03 (Core) | Appointment Availability Assessment | Partially Shared** | |
| QI 04 (Core) | Patient Experience Feedback | Site-Specific | |
| QI 05 (1 Credit) | Health Disparities Assessment | Site-specific | |
| QI 06 (1 Credit) | Validated Patient Experience Survey Use | Site-specific | |
| QI 07 (2 Credits) | Vulnerable Patient Feedback | Site-specific | |
| Competency B: Quality Improvement | | | |
| QI 08 (Core) <i>*D is New</i> | Goals & Actions to Improve Clinical Quality Measures | Site-Specific | |
| QI 09(Core) | Goals & Actions to Improve Resource Stewardship Measures | Site-Specific | |
| QI 10 (Core) | Goals & Actions to Improve Appointment Availability | Site-Specific | |
| QI 11 (Core) | Goals & Actions to Improve Patient Experience | Site-Specific | |
| QI 12 (2 Credits) | Improved Performance | Site-Specific | |
| QI 13 (1 Credit) | Goals & Actions to Improve Disparities in Care/Service | Site-Specific | |
| QI 14 (2 Credits) | Improved Performance for Disparities in Care/Service | Site-Specific | |
| Competency C: Reporting Performance | | | |
| QI 15 (Core) | Reporting Performance Within the Practice | Shared | |
| QI 16 (1 Credit) | Reporting Performance Publicly or with Patients | Shared | |
| QI 17 (2 Credits) | Patient/Family/Caregiver Involvement in Quality Improvement | Shared | |
| QI 18 (2 Credits) | Reporting Performance Measures to Medicare/Medicaid | Shared | |
| QI 19* (Maximum 2 credits) | Value-Based Contract Agreements A. Up-Side Risk Contract B. Two-Sided Risk Contract | Shared | |

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