



Patient-Centered Medical Home (PCMH) PCMH 2014 Corporate Credit Transition to PCMH (Version 5) Shared Credit Table Updated July 2019

Multi-site organizations that completed a PCMH 2014 corporate survey tool with practices pursuing PCMH recognition may use this table to transition to the redesigned 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 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	10 criteria	5 criteria	0 criteria	29 criteria
Total Criteria	40 criteria	39 criteria	21 criteria	1 criterion	101 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 most recent version 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	
KM 29* (1 Credit)	Opioid Treatment Agreement	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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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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+Only CC 21C is eligible for attestation. Organizations must still demonstrate evidence to meet CC 21A and B.

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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