

## **Appendix 1**

# **PCMH Scoring and Shared Criteria**



## □ Appendix 1: PCMH Scoring and Shared Criteria

### Scoring Summary

To achieve recognition under PCMH, practices must: 1) meet all core criteria in the program and 2) earn 25 elective credits in elective criteria across 5 of 6 concepts.

The tables below identify the scoring designation (Core or Elective) and whether the criteria can be shared or requires site-specific evidence. An organization can share evidence if it has at least two practice sites that share the same system and processes.

#### **40 core criteria, 60 elective criteria with 83 elective credits available**

<b>Team-Based Care and Practice Organization (TC) 8 Criteria Total // 5 Core Criteria // 4 Elective Criteria</b>		
<b>Criteria Name</b>	<b>Core/Elective</b>	<b>Shared or Site-Specific</b>
<b>Competency A: The Practice's Organization</b>		
<b>TC 01: PCMH Transformation Leads</b>	<b>Core</b>	Shared
<b>TC 02 Structure and Staff Responsibilities</b>	<b>Core</b>	Shared
<b>TC 03: External PCMH Collaborations</b>	Elective (1 Credit)	Shared
<b>TC 04: Patients/Families/Caregivers Involvement in Governance</b>	Elective (2 Credits)	Shared
<b>TC 05: Certified EHR System</b>	Elective (2 Credits)	Shared
<b>Competency B: Team Communication</b>		
<b>TC 06: Individual Patient Care Meetings/ Communication</b>	<b>Core</b>	Shared- Documented Process Only
<b>TC 07: Staff Involvement in Quality Improvement</b>	<b>Core</b>	Shared
<b>TC 08: Behavioral Health Care Manager</b>	Elective (2 Credits)	Shared
<b>Competency C: Medical Home Responsibilities</b>		
<b>TC 09: Medical Home Information</b>	<b>Core</b>	Shared

<b>Knowing and Managing Your Patients (KM)</b> 28 Criteria // 10 Core Criteria // 18 Elective Criteria		
<b>Criteria Name</b>	<b>Core/Elective</b>	<b>Shared or Site-Specific</b>
<b>Competency A: Collecting Patient Information</b>		
<b>KM 01: Problem Lists</b>	<b>Core</b>	Site-Specific
<b>KM 02: Comprehensive Health Assessment</b>	<b>Core</b>	Shared
<b>KM 03: Depression Screening</b>	<b>Core</b>	Shared
<b>KM 04: Behavioral Health Screenings</b>	Elective (1 Credit)	Shared
<b>KM 05: Oral Health Assessment and Services</b>	Elective (1 Credit)	Shared
<b>KM 06: Predominant Conditions and Concerns</b>	Elective (1 Credit)	Shared
<b>KM 07: Social Determinants of Health</b>	Elective (2 Credits)	Site-Specific
<b>KM 08: Patient Materials</b>	Elective (1 Credit)	Shared
<b>Competency B: Patient Diversity</b>		
<b>KM 09: Diversity</b>	<b>Core</b>	Site-Specific
<b>KM 10: Language</b>	<b>Core</b>	Site-Specific
<b>KM 11: Staff Cultural Competence and Health Literacy Skills</b>	Elective (1 Credit)	Shared
<b>Competency C: Addressing Patient Needs</b>		
<b>KM 12: Proactive Outreach</b>	<b>Core</b>	Shared
<b>KM 13: Excellence in Performance</b>	Elective (2 Credits)	Site-Specific
<b>Competency D: Medication Management</b>		
<b>KM 14: Medication Reconciliation</b>	Core	Site-Specific
<b>KM 15: Medication Lists</b>	Core	Site-Specific
<b>KM 16: New Prescription Education</b>	Elective (1 Credit)	Site-Specific
<b>KM 17: Medication Responses and Barriers</b>	Elective (1 Credit)	Site-Specific
<b>KM 18: Controlled Substance Database Review</b>	Elective (1 Credit)	Shared
<b>KM 19: Prescription Claims Data</b>	Elective (2 Credits)	Shared
<b>Competency E: Evidence-Based Care</b>		
<b>KM 20: Clinical Decision Support</b>	<b>Core</b>	Shared
<b>Competency F: Connecting With Community Resources</b>		

Knowing and Managing Your Patients (KM) 28 Criteria // 10 Core Criteria // 18 Elective Criteria		
Criteria Name	Core/Elective	Shared or Site-Specific
<b>KM 21: Community Resource Needs</b>	<b>Core</b>	Shared
<b>KM 22: Access to Educational Resources</b>	Elective (1 Credit)	Shared
<b>KM 23: Oral Health Education</b>	Elective (1 Credit)	Shared
<b>KM 24: Shared Decision-Making Aids</b>	Elective (1 Credit)	Shared
<b>KM 25: School/Intervention Agency Engagement</b>	Elective (1 Credit)	Shared
<b>KM 26: Community Resource List</b>	Elective (1 Credit)	Shared
<b>KM 27: Community Resource Assessment</b>	Elective (1 Credit)	Shared
<b>KM 28: Case Conferences</b>	Elective (2 Credits)	Shared

Patient-Centered Access and Continuity (AC) 14 Criteria // 7 Core Criteria // 7 Elective Criteria		
Criteria Name	Core/Elective	Shared or Site-Specific
<b>Competency A: Patient Access to the Practice</b>		
<b>AC 01: Access Needs and Preferences</b>	<b>Core</b>	Shared-Documented Process Only
<b>AC 02: Same-Day appointments</b>	<b>Core</b>	Shared-Documented Process Only
<b>AC 03: Appointments Outside Business Hours</b>	<b>Core</b>	Shared
<b>AC 04: Timely Clinical Advice by Telephone</b>	<b>Core</b>	Shared
<b>AC 05: Clinical Advice Documentation</b>	<b>Core</b>	Shared
<b>AC 06: Alternative Appointments</b>	Elective (1 Credit)	Shared-Documented Process Only
<b>AC 07: Electronic Patient Requests</b>	Elective (1 Credit)	Shared
<b>AC 08: Two-Way Electronic Communication</b>	Elective (1 Credit)	Shared
<b>AC 09: Equity of Access</b>	Elective (1 Credit)	Site-Specific
<b>Competency B: Empanelment and Access to the Medical Record</b>		
<b>AC 10: Personal Clinician Selection</b>	<b>Core</b>	Shared
<b>AC 11: Patient Visits with Clinician/Team</b>	<b>Core</b>	Site-Specific
<b>AC 12: Continuity of Medical Record Information</b>	Elective (2 Credits)	Shared
<b>AC 13: Panel Size Review and Management</b>	Elective (1 Credit)	Shared-Documented Process Only
<b>AC 14: External Panel Review and Reconciliation</b>	Elective (1 Credit)	Shared-Documented Process Only

<b>Care Management and Support</b> 9 Criteria // 4 Core Criteria // 5 Elective Criteria		
<b>Criteria Name</b>	<b>Core/Elective</b>	<b>Shared or Site-Specific</b>
<b>Competency A: Identifying Care Managed Patients</b>		
<b>CM 01: Identifying Patients for Care Management</b>	<b>Core</b>	Shared
<b>CM 02: Monitoring Patients for Care Management</b>	<b>Core</b>	Site-Specific
<b>CM 03: Comprehensive Risk-Stratification Process</b>	Elective (2 Credits)	Shared
<b>Competency B: Care Plan Development</b>		
<b>CM 04: Person-Centered Care Plans</b>	<b>Core</b>	Shared- Patient Examples Only
<b>CM 05: Written Care Plans</b>	<b>Core</b>	Shared- Patient Examples Only
<b>CM 06: Patient Preferences and Goals</b>	Elective (1 Credit)	Shared- Patient Examples Only
<b>CM 07: Patient Barriers to Goals</b>	Elective (1 Credit)	Shared- Patient Examples Only
<b>CM 08: Self-Management Plans</b>	Elective (1 Credit)	Shared- Patient Examples Only
<b>CM 09: Care Plan Integration</b>	Elective (1 Credit)	Shared

<b>Coordinating Care and Care Transitions (CC)</b> 21 Criteria // 5 Core Criteria // 16 Elective Criteria		
<b>Criteria Name</b>	<b>Core/Elective</b>	<b>Shared or Site-Specific</b>
<b>Competency A: Diagnostic Test Tracking and Follow-Up</b>		
<b>CC 01: Lab and Imaging Test Management</b>	<b>Core</b>	Shared
<b>CC 02: Newborn Screenings</b>	Elective (1 Credit)	Shared
<b>CC 03: Appropriate Use for Labs and Imaging</b>	Elective (2 Credits)	Shared
<b>Competency B: Referrals to Specialists</b>		
<b>CC 04: Referral Management</b>	<b>Core</b>	Shared
<b>CC 05: Appropriate Referrals</b>	Elective (2 Credits)	Shared
<b>CC 06: Commonly Used Specialists Identification</b>	Elective (1 Credit)	Site-Specific
<b>CC 07: Performance Information for Specialist Referrals</b>	Elective (1 Credit)	Shared
<b>CC 08: Specialist Referral Expectations</b>	Elective (1 Credit)	Shared
<b>CC 09: Behavioral Health Referral Expectations</b>	Elective (2 Credits)	Shared

<b>Coordinating Care and Care Transitions (CC)</b> 21 Criteria // 5 Core Criteria // 16 Elective Criteria		
<b>Criteria Name</b>	<b>Core/Elective</b>	<b>Shared or Site-Specific</b>
<b>CC 10: Behavioral Health Integration</b>	Elective (2 Credits)	Shared
<b>CC 11: Referral Monitoring</b>	Elective (1 Credit)	Shared-Documented Process Only
<b>CC 12: Co-Management Arrangements</b>	Elective (1 Credit)	Site-Specific
<b>CC 13: Treatment Options and Costs</b>	Elective (2 Credits)	Shared-Documented Process Only
<b>Competency C: Coordinating Care With Health Care Facilities.</b>		
<b>CC 14: Identifying Unplanned Hospital and ED Visits</b>	<b>Core</b>	Shared
<b>CC 15: Sharing Clinical Information</b>	<b>Core</b>	Shared
<b>CC 16: Post-Hospital/ED Visit Follow-Up</b>	<b>Core</b>	Shared
<b>CC 17: Acute Care After Hours Coordination</b>	Elective (1 Credit)	Shared-Documented Process Only
<b>CC 18: Information Exchange During Hospitalization</b>	Elective (1 Credit)	Shared
<b>CC 19: Patient Discharge Summaries</b>	Elective (1 Credit)	Shared
<b>CC 20: Care Plan Collaboration for Practice Transitions</b>	Elective (1 Credit)	Site-Specific
<b>CC 21: External Electronic Exchange of Information</b>	Elective (Max. 3 Credits)	Shared

<b>Performance and Quality Improvement (QI) 19 Criteria // 9 Core Criteria // 10 Elective Criteria</b>		
<b>Criteria Name</b>	<b>Core/Elective</b>	<b>Shared or Site-Specific</b>
<b>Competency A: Measuring Performance</b>		
<b>QI 01: Clinical Quality Measures</b>	<b>Core</b>	Site-Specific
<b>QI 02: Resource Stewardship Measures</b>	<b>Core</b>	Site-Specific
<b>QI 03: Appointment Availability Assessment</b>	<b>Core</b>	Shared-Documented Process Only
<b>QI 04: Patient Experience Feedback</b>	<b>Core</b>	Site-Specific
<b>QI 05: Health Disparities Assessment</b>	Elective (1 Credit)	Site-Specific
<b>QI 06: Validated Patient Experience Survey Use</b>	Elective (1 Credit)	Site-Specific
<b>QI 07: Vulnerable Patient Feedback</b>	Elective (2 Credits)	Site-Specific
<b>Competency B: Setting Goals and Acting to Improve</b>		
<b>QI 08: Goals and Actions to Improve Clinical Quality Measures</b>	<b>Core</b>	Site-Specific
<b>QI 09: Goals and Actions to Improve Resource Stewardship Measures</b>	<b>Core</b>	Site-Specific
<b>QI 10: Goals and Actions to Improve Appointment Availability</b>	<b>Core</b>	Site-Specific
<b>QI 11: Goals and Actions to Improve Patient Experience</b>	<b>Core</b>	Site-Specific
<b>QI 12: Improved Performance</b>	Elective (2 Credits)	Site-Specific
<b>QI 13: Goals and Actions to Improve Disparities in Care/Service</b>	Elective (1 Credit)	Site-Specific
<b>QI 14: Improved Performance for Disparities in Care/Service</b>	Elective (2 Credits)	Site-Specific
<b>Competency C: Reporting Performance</b>		
<b>QI 15: Reporting Performance Within the Practice</b>	<b>Core</b>	Shared
<b>QI 16: Reporting Performance Publicly or With Patients</b>	Elective (1 Credit)	Shared
<b>QI 17: Patient/Family/Caregiver Involvement in Quality Improvement</b>	Elective (2 Credits)	Shared
<b>QI 18: Reporting Performance Measures to Medicare/Medicaid</b>	Elective (2 Credits)	Shared
<b>QI 19: Value-Based Contract Agreements</b>	Elective (Max 2 Credits)	Shared