

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 shows whether the criteria require site-specific evidence (column 3) and/or requires specialty-specific evidence (column 4). An organization can share evidence if it has at least two practice sites that share the same system and processes.

40 core criteria, 61 elective criteria with 84 elective credits available

Team-Based Care and Practice Organization (TC) 9 Criteria Total // 5 Core Criteria // 4 Elective Criteria		
Criteria Name	Core/Elective	Shared or Site-Specific
Competency A: The Practice's Organization		
TC 01: PCMH Transformation Leads	Core	Shared
TC 02 Structure and Staff Responsibilities	Core	Shared
TC 03: External PCMH Collaborations	Elective (1 Credit)	Shared
TC 04: Patients/Families/Caregivers Involvement in Governance	Elective (2 Credits)	Shared
TC 05: Certified EHR System	Elective (2 Credits)	Shared
Competency B: Team Communication		
TC 06: Individual Patient Care Meetings/ Communication	Core	Shared-Documented Process Only
TC 07: Staff Involvement in Quality Improvement	Core	Shared
TC 08: Behavioral Health Care Manager	Elective (2 Credits)	Shared
Competency C: Medical Home Responsibilities		
TC 09: Medical Home Information	Core	Shared

Knowing and Managing Your Patients (KM) 29 Criteria // 10 Core Criteria // 19 Elective Criteria		
Criteria Name	Core/Elective	Shared or Site-Specific
Competency A: Collecting Patient Information		
KM 01: Problem Lists	Core	Site-Specific
KM 02: Comprehensive Health Assessment	Core	Shared
KM 03: Depression Screening	Core	Shared
KM 04: Behavioral Health Screenings	Elective (1 Credit)	Shared
KM 05: Oral Health Assessment and Services	Elective (1 Credit)	Shared
KM 06: Predominant Conditions and Concerns	Elective (1 Credit)	Shared
KM 07: Social Determinants of Health	Elective (2 Credits)	Site-Specific
KM 08: Patient Materials	Elective (1 Credit)	Shared
Competency B: Patient Diversity		
KM 09: Diversity	Core	Site-Specific
KM 10: Language	Core	Site-Specific
KM 11: Staff Cultural Competence and Health Literacy Skills	Elective (1 Credit)	Shared
Competency C: Addressing Patient Needs		
KM 12: Proactive Outreach	Core	Shared
KM 13: Excellence in Performance	Elective (2 Credits)	Site-Specific
Competency D: Medication Management		
KM 14: Medication Reconciliation	Core	Site-Specific
KM 15: Medication Lists	Core	Site-Specific
KM 16: New Prescription Education	Elective (1 Credit)	Site-Specific
KM 17: Medication Responses and Barriers	Elective (1 Credit)	Site-Specific
KM 18: Controlled Substance Database Review	Elective (1 Credit)	Shared
KM 19: Prescription Claims Data	Elective (2 Credits)	Shared
Competency E: Evidence-Based Care		
KM 20: Clinical Decision Support	Core	Shared
Competency F: Connecting With Community Resources		
KM 21: Community Resource Needs	Core	Shared
KM 22: Access to Educational Resources	Elective (1 Credit)	Shared
KM 23: Oral Health Education	Elective (1 Credit)	Shared

Knowing and Managing Your Patients (KM) 29 Criteria // 10 Core Criteria // 19 Elective Criteria		
Criteria Name	Core/Elective	Shared or Site-Specific
KM 24: Shared Decision-Making Aids	Elective (1 Credit)	Shared
KM 25: School/Intervention Agency Engagement	Elective (1 Credit)	Shared
KM 26: Community Resource List	Elective (1 Credit)	Shared
KM 27: Community Resource Assessment	Elective (1 Credit)	Shared
KM 28: Case Conferences	Elective (2 Credits)	Shared
Competency G: Additional Patient Collaboration		
KM 29: Opioid Treatment Agreement	Elective (1 Credit)	Shared

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

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

Coordinating Care and Care Transitions (CC) 21 Criteria // 5 Core Criteria // 16 Elective Criteria		
Criteria Name	Core/Elective	Shared or Site-Specific
Competency A: Diagnostic Test Tracking and Follow-Up		
CC 01: Lab and Imaging Test Management	Core	Shared
CC 02: Newborn Screenings	Elective (1 Credit)	Shared
CC 03: Appropriate Use for Labs and Imaging	Elective (2 Credits)	Shared
Competency B: Referrals to Specialists		
CC 04: Referral Management	Core	Shared
CC 05: Appropriate Referrals	Elective (2 Credits)	Shared
CC 06: Commonly Used Specialists Identification	Elective (1 Credit)	Site-Specific
CC 07: Performance Information for Specialist Referrals	Elective (2 Credit)	Shared
CC 08: Specialist Referral Expectations	Elective (1 Credit)	Shared
CC 09: Behavioral Health Referral Expectations	Elective (2 Credits)	Shared
CC 10: Behavioral Health Integration	Elective (2 Credits)	Shared
CC 11: Referral Monitoring	Elective (1 Credit)	Shared-Documented Process Only
CC 12: Co-Management Arrangements	Elective (1 Credit)	Site-Specific
CC 13: Connects to Financial Resources	Elective (2 Credits)	Shared-Documented Process Only
Competency C: Coordinating Care With Health Care Facilities		
CC 14: Identifying Unplanned Hospital and ED Visits	Core	Shared
CC 15: Sharing Clinical Information	Core	Shared
CC 16: Post-Hospital/ED Visit Follow-Up	Core	Shared
CC 17: Acute Care After Hours Coordination	Elective (1 Credit)	Shared-Documented Process Only
CC 18: Information Exchange During Hospitalization	Elective (1 Credit)	Shared
CC 19: Patient Discharge Summaries	Elective (1 Credit)	Shared
CC 20: Care Plan Collaboration for Practice Transitions	Elective (1 Credit)	Site-Specific
CC 21: External Electronic Exchange of Information	Elective (Max. 3 Credits)	Shared

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