

Designing a PCMH Development Plan

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Suggested Steps...



1. Convene PCMH development **TEAM**
2. Schedule regular PCMH development TEAM meetings
3. Determine goals for PCMH development
4. Complete a Readiness Assessment and identify gaps in PCMH core capabilities
5. Action Planning - Identify a Pathway to PCMH Implementation
6. Develop a workplan and timeline to accomplish your goals, including responsibilities for **TEAM** members
7. Engage your entire clinic team, Re-assess status regularly, Celebrate successes!

1. Convene PCMH Development TEAM



Convene a PCMH Team that includes a designated Coordinator or Manager as well as staff who:

- Interact with patients in some fashion
- Influence policy, process, or practice
- Are knowledgeable about data and how it can be extracted
- Are committed to PCMH development
- Are committed to learning and sharing knowledge
- Are committed to rolling up their sleeves and getting it done

2. Schedule regular PCMH development meetings with **TEAM**



Ten steps for effective team meetings

- Identify the team
- Meet regularly and “on-the-clock”
- Agree on ground rules
- Set a consistent meeting agenda
- Rotate meeting roles
- Solve problems as a group
- Record action steps, owners and due dates
- Practice good meeting skills
- Have some fun!
- Celebrate your successes

Resource: [AMA STEPSforward Conducting Effective Team Meetings](#)

3. Determine Goals for PCMH 2017 Transition

- On our last webinar we presented options for each organization, depending on their size and status with PCMH recognition
 - **Case Study A:** *Organizations with all sites recognized (one or more sites) at 2014 PCMH Level 3*
 - **Case Study B:** *Submitted a Multi-Site application for 2014 guidelines, now want to get new sites recognized*
 - **Case Study C:** *Submitted 1 or more individual site applications, now want to get new sites recognized*
 - **Case Study D:** *One or more sites with 2014 Level 3 & one or more sites with 2014 Level 2*
- We suggest you use the slides from this webinar to determine how your organization/practice site can proceed with PCMH 2017 [Webinar 07.10.18 How to Transition to and Maintain 2017 PCMH Recognition – Case Studies and Resources](#)

3. Determine Goals for PCMH 2017 Transition (continued)

- Your PCMH workplan (the focus of this webinar) will depend on your organization's goals
 - For example, if your practice site already has PCMH 2014 Level 3 recognition, you will be focusing your workplan just on the **CORE** 2017 criteria
 - For example, if your practice site is pursuing new recognition, you will focus on all 2017 criteria
- Make sure to consult the slides from “[Webinar 07.10.18 How to Transition to and Maintain 2017 PCMH Recognition – Case Studies and Resources](#).” where we mention how you may be able to shorten the documentation workload based on your organization's status with PCMH recognition

4. Complete a Readiness Assessment

This can be completed by the team at one of your first meetings

- Use the [CHS PCMH Tracker 2017](#) to do a self-assessment of the core criteria.

- Which core criteria are practiced at each site?

NCQA PCMH 2017 Concepts, Competencies, and Criteria as of 9.30.17

To achieve recognition under PCMH 2017, practices must meet all core criteria and earn 25 credits in elective criteria across 5 of 6 concepts.

INSTRUCTIONS: Use the checkboxes to mark criteria and documentation as they are put in place at your organization. All core criteria are highlighted in red until marked. The "documents incomplete" message will appear once you mark a criterion as in place but the documentation is not yet marked. The summary boxes below reflect the overall progress toward required criteria/credits, based on what has been marked in this *CHS PCMH Tracker*. The ● symbol indicates where the documentation can be shared across practice sites (e.g. for multi-site applications).

| | | | |
|-----------------|---|---|--|
| Summary: | Core Criteria Met (out of 40) | 0 | Must Choose Elective Criteria from 5 of 6 Concepts |
| | Elective Criteria Met (25 Credits required) | 0 | |

Use Policy. The CHS PCMH Tracker 2017 is produced and copyrighted by Community Health Solutions for exclusive use by our authorized clients. Utilization of the tool without authorization by Community Health Solutions is strictly prohibited. We ask that authorized users do not share this tool with other organizations. For additional information contact Community Health Solutions at 804.673.0166 or chs@chsresults.com.

Team-Based Care and Practice Organization (TC)

The practice provides continuity of care, communicates roles and responsibilities of the medical home to patients/families/caregivers, and organizes and trains staff to work to the top of their license and provide effective team-based care.

Competency A: The practice is committed to transforming the practice into a sustainable medical home. Members of the care team serve specific roles as defined by the practice's organizational structure and are equipped with the knowledge and training necessary to perform those functions.

| | | | | | | | | | |
|-------|------|---|--------------------------|--|----------------------------------|----------------------------|-----|--|----------------------------|
| TC 01 | Core | Designates a clinician lead of the medical home and a staff person to manage the PCMH transformation and medical home activities. | <input type="checkbox"/> | | Details about the clinician lead | ● <input type="checkbox"/> | AND | Details about the PCMH Manager | ● <input type="checkbox"/> |
| TC 02 | Core | Defines practice organizational structure and staff | <input type="checkbox"/> | | Staff structure | ● <input type="checkbox"/> | AND | Description of staff roles, skills and | ● <input type="checkbox"/> |

Resource: [CHS PCMH Tracker 2017](#)

5. Action Planning based on Readiness Assessment



Identify a Pathway for PCMH Development

- Which criteria are already “in place” but need to have a policy/evidence of implementation? *Note: through this exploration and development you may find that you make a few tweaks to your processes – that’s typical!*
- Do you have sufficient criteria and credits already identified?
- Are there additional criteria you may need to implement in order to achieve recognition?
- The list of criteria you have or plan to implement is your pathway/roadmap

Pathway to PCMH Recognition



- We developed a version of the CHS PCMH Tracker where we highlighted a set of elective criteria that could get you to PCMH recognition
 - This is a jump start – not a prescription
 - This is meant for organizations new to PCMH recognition
 - Downloadable from [Jump Start Pathway to PCMH Recognition](#)
- We also created an accompanying tool – a [Core Criteria Implementation Priorities Pathway](#).
 - One approach for choosing implementation priorities/order of operations

The CHS PCMH Tracker_Pathway

- We evaluated all 100 criteria and considered which criteria **may be the most feasible for safety net organizations.**

We realize that decisions about these criteria are best left to each organization. Please consider this Pathway as just one approach, from which your organization may further tailor the criteria you wish to put in place for PCMH recognition.

<https://chcleadership.com/jump-start-pathway-to-pcmh-recognition/>

| Team-Based Care and Practice Organization (TC) | | | | | | |
|---|-----------|--|-------------------------------------|----------------------|---|-----------------------------|
| The practice provides continuity of care, communicates roles and responsibilities of the medical home to patients/families/caregivers, and work to the top of their license and provide effective team-based care. | | | | | | |
| Competency A: The practice is committed to transforming the practice into a sustainable medical home. Members of the care team support the practice's organizational structure and are equipped with the knowledge and training necessary to perform those functions. | | | | | | |
| TC 01 | Core | PCMH Transformation Leads: Designates a clinician lead of the medical home and a staff person to manage the PCMH transformation and medical home activities. | <input checked="" type="checkbox"/> | Documents Incomplete | Details about the clinician lead | <input type="checkbox"/> AM |
| TC 02 | Core | Structure and Staff Responsibilities: Defines practice organizational structure and staff responsibilities/skills to support key PCMH functions. | <input checked="" type="checkbox"/> | Documents Incomplete | Staff structure overview | <input type="checkbox"/> AM |
| TC 03 | 1 Credit | External PCMH Collaborations: The practice is involved in external PCMH-oriented collaborative activities (e.g., federal/state initiatives). | <input type="checkbox"/> | | Description of involvement in external collaborative activity | <input type="checkbox"/> |
| TC 04 | 2 Credits | Patients/Families/Caregivers Involvement in Governance: Patients/families/caregivers are involved in the practice's governance structure or on stakeholder committees. | <input type="checkbox"/> | | Documented process | <input type="checkbox"/> AM |
| TC 05 | 2 Credits | Certified EHR System: The practice uses a certified electronic health record technology (CEHRT) system. | <input checked="" type="checkbox"/> | Documents Incomplete | Certified Electronic Health Records System (EHR) name | <input type="checkbox"/> |
| Competency B: Communication among staff is organized to ensure that patient care is coordinated, safe, and effective. | | | | | | |
| | | Individual Patient Care Meetings/Communication: Has regular | <input checked="" type="checkbox"/> | Documents | | <input type="checkbox"/> |

Core Criteria Implementation Priorities Pathway

- We put together a list of core criteria, in order of priority for implementation (what to work on first, second...)
- This is one approach, we **encourage you to adjust based on your organizational capacity and capabilities determined in the self-assessment**
- **How to use it:**
 1. New recognition: Systematically study each criterion, engage team members, develop capacity, and prepare evidence of implementation
 2. Existing recognition: Preparing for annual check-in or accelerated renewal by reviewing core criteria to ensure processes are still in place

A Pathway for Implementation of Core Criteria
 NCQA PCMH 2017 Guidelines

There are 40 core/required criteria in the NCQA PCMH 2017 Standards and Guidelines. Based on our knowledge of implementation considerations for these criteria, we recommend a pathway and priority list below. This is not meant to be prescriptive but is one approach for practices to use as they work through implementation and transformation.

| Core Criteria | Criteria Brief Description | Implementation Priority |
|---------------|--|-------------------------|
| TC 01 | PCMH Transformation Leads | 1 |
| TC 02 | Structure and Staff Responsibilities | 1 |
| AC 02 | Same-Day Appointments | 2 |
| AC 03 | Appointments Outside Business Hours | 2 |
| CM 01 | Identifying Patients for Care Management | 3 |
| CM 02 | Monitoring Patients for Care Management | 3 |
| CM 04 | Person-Centered Care Plans | 4 |
| CM 05 | Written Care Plans | 4 |
| TC 06 | Individual Patient Care Meetings/Communication | 5 |
| KM 03 | Depression Screening | 6 |
| KM 12 | Proactive Outreach | 6 |
| OC 01 | Lab and Imaging Test Management | 7 |
| OC 04 | Referral Management | 7 |
| OC 14 | Identifying Unplanned Hospital and ED Visits | 8 |
| OC 16 | Post-Hospital/ED visit Follow-Up | 8 |
| OC 15 | Sharing Clinical Information | 9 |
| TC 07 | Staff Involvement in Quality Improvement | 10 |
| QI 01 | Clinical Quality Measures | 11 |
| QI 08 | Goals and Actions to Improve Clinical Quality Measures | 11 |
| QI 02 | Resource Stewardship Measures | 12 |
| QI 09 | Goals and Actions to Improve Resource Stewardship Measures | 12 |
| AC 01 | Access Needs and Preferences | 13 |
| QI 03 | Appointment Availability Assessment | 13 |
| QI 10 | Goals and Actions to Improve Appointment Availability | 13 |
| QI 04 | Patient Experience Feedback | 14 |
| QI 11 | Goals and Actions to Improve Patient Experience | 14 |
| QI 15 | Reporting Performance within the Practice | 15 |
| AC 04 | Timely Clinical Advice by Telephone | 16 |
| AC 05 | Clinical Advice Documentation | 16 |
| KM 20 | Clinical Decision Support | 17 |
| KM 01 | Problem Lists | 18 |
| KM 02 | Comprehensive Health Assessment | 18 |
| AC 10 | Personal Clinician Selection | 19 |
| AC 11 | Patient Visits with Clinician/Team | 19 |
| KM 14 | Medication Reconciliation | 20 |
| KM 15 | Medication Lists | 20 |
| TC 09 | Medical Home Information | 21 |
| KM 09 | Diversity | 22 |
| KM 10 | Language | 22 |
| KM 21 | Community Resource Needs | 23 |

Resource: [Core Criteria Implementation Priorities Pathway](#)

Additional Resources for Pediatric Practices




- ***PCMH 2017: Suggested Pathway – Pediatrics***
- **Patient-Centered Medical Home FAQ's For Pediatric Populations (NCQA. Updated: December 11, 2017)**
- Find these documents on the CHCH Leadership portal in the **[CHS PCMH Knowledge Base 2017](#)**. Search 'keyword': **pediatric**

6. Develop a Workplan and Timeline



- Your workplan and timeline should be tied to your overall goals for PCMH recognition
- Including targets and responsibilities for **TEAM** members to develop additional patient-centered processes, as necessary
- See DRAFT workplan on the next slide

Example work plan (Month 1)



| Action Steps | PCMH Criteria | Owner (List Names) | Begin Date | Target Due date | Completion |
|---|---------------|------------------------------|------------|-----------------|------------|
| Convene PCMH Team | TC01 | CHC leadership | M1 | M1 | M1 |
| Identify clinical and administrative leads | TC01 | CHC leadership | M1 | M1 | M1 |
| Determine goals for PCMH development | n/a | CHC leadership and PCMH Team | M1 | M1 | M1 |
| Complete Readiness Assessment | n/a | PCMH Team | M1 | M1 | M1 |
| Identify Pathway to PCMH Implementation | n/a | PCMH Team | M1 | M1 | M2 |
| Submit NOI | n/a | Admin Lead | M1 | M1 | M3 |
| Request Pre-validation Documentation from EHR vendor | All | IT Lead | M1 | M1 | M2 |

7. Remember to

- Engage your entire practice site team along the way!
- Reassess status regularly!
- Celebrate successes!



7. Reassess status regularly!



- **The CHS PCMH Tracker 2017**
 - The practice used this tool to complete an initial self assessment
 - The results were used to identify gaps and guide their pathway to recognition
 - Use the CHS PCMH Tracker to mark off criteria and documentation as they are put into place.
 - See a summary at the top of your progress toward requirements.

Resource: [CHS PCMH Tracker 2017](#)

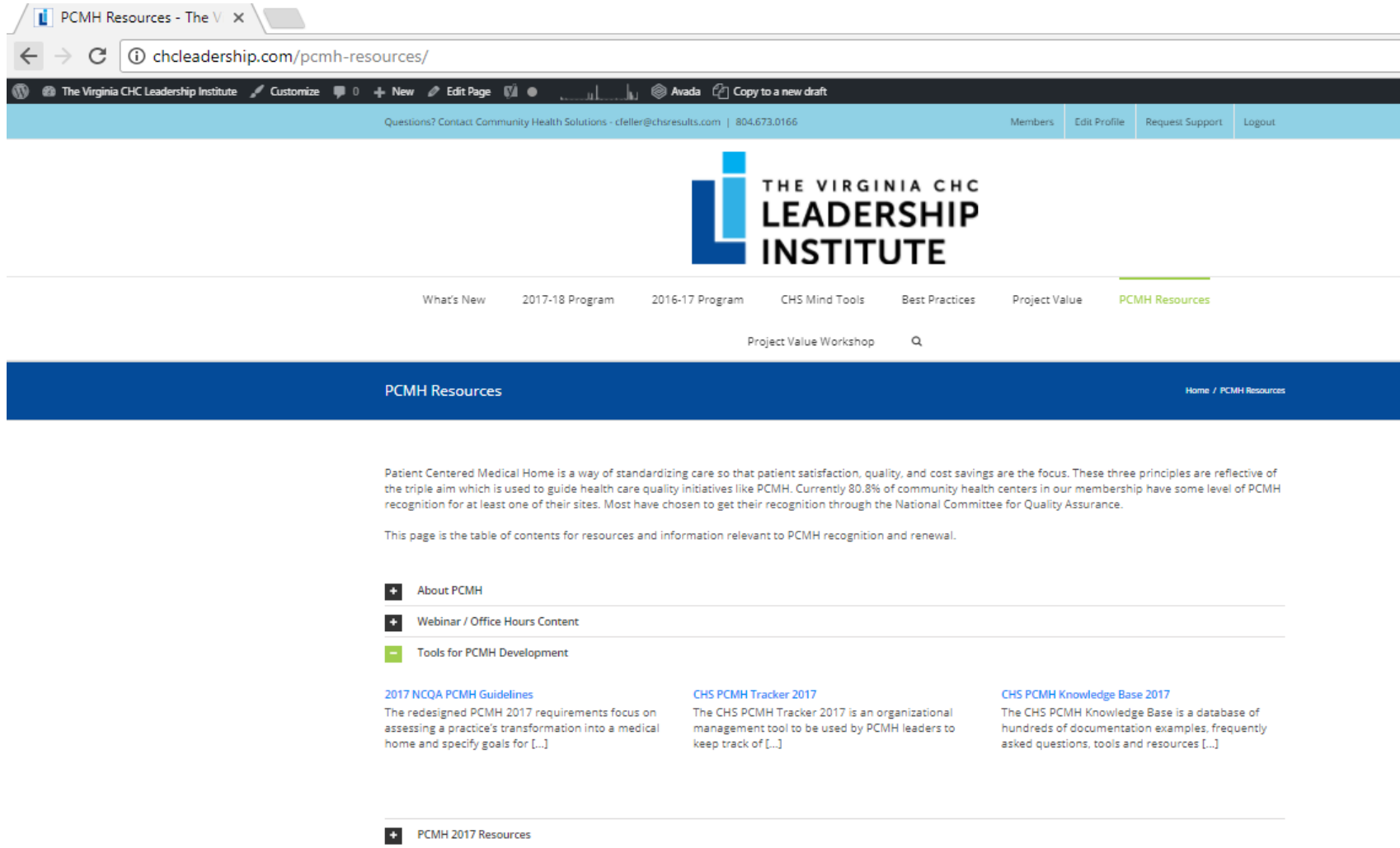
7. How do you celebrate success?



Questions?



<http://chcleadership.com/pcmh-resources/>



The screenshot shows a web browser displaying the PCMH Resources page. The browser's address bar shows the URL <http://chcleadership.com/pcmh-resources/>. The website header includes the logo for The Virginia CHC Leadership Institute and a navigation menu with items like 'What's New', '2017-18 Program', '2016-17 Program', 'CHS Mind Tools', 'Best Practices', 'Project Value', and 'PCMH Resources'. The main content area features a blue header with 'PCMH Resources' and a breadcrumb trail 'Home / PCMH Resources'. Below this, there is a paragraph explaining the PCMH concept and its recognition. A table of contents lists sections such as 'About PCMH', 'Webinar / Office Hours Content', and 'Tools for PCMH Development'. The 'Tools for PCMH Development' section is expanded, showing three items: '2017 NCQA PCMH Guidelines', 'CHS PCMH Tracker 2017', and 'CHS PCMH Knowledge Base 2017'. Each item has a brief description of its content.

PCMH Resources Home / PCMH Resources

Patient Centered Medical Home is a way of standardizing care so that patient satisfaction, quality, and cost savings are the focus. These three principles are reflective of the triple aim which is used to guide health care quality initiatives like PCMH. Currently 80.8% of community health centers in our membership have some level of PCMH recognition for at least one of their sites. Most have chosen to get their recognition through the National Committee for Quality Assurance.

This page is the table of contents for resources and information relevant to PCMH recognition and renewal.

- + About PCMH
- + Webinar / Office Hours Content
- Tools for PCMH Development
 - [2017 NCQA PCMH Guidelines](#)
The redesigned PCMH 2017 requirements focus on assessing a practice's transformation into a medical home and specify goals for [...]
 - [CHS PCMH Tracker 2017](#)
The CHS PCMH Tracker 2017 is an organizational management tool to be used by PCMH leaders to keep track of [...]
 - [CHS PCMH Knowledge Base 2017](#)
The CHS PCMH Knowledge Base is a database of hundreds of documentation examples, frequently asked questions, tools and resources [...]
- + PCMH 2017 Resources

| Source | Title | Description and links. |
|--------|---|--|
| NCQA | Home Page for NCQA PCMH Recognition | <p>This page is the NCQA hub for PCMH development activities. From this page you can navigate to additional PCMH Development resources, including the ones I highlighted below.</p> <p>http://www.ncqa.org/programs/recognition/practices/patient-centered-medical-home-pcmh</p> |
| NCQA | NCQA PCMH Recognition: Getting Started: | <p>This page outlines the initial steps to recognition.</p> <p>http://www.ncqa.org/programs/recognition/practices/patient-centered-medical-home-pcmh/getting-recognized/get-started</p> |
| NCQA | PCMH 2017 Standards and Guidelines. | <p>Here is the direct link to a series of videos that offer an introduction to the You will have to register, but registration is free.</p> <p>https://ncqa.secure.force.com/pmtx/evt_sem_Detail?id=a0v41000002eJek</p> |
| NCQA | PCMH 2017 Standards and Guidelines. | <p>Here is the direct link to download a free electronic copy of the NCQA PCMH 2017 Standards and Guidelines</p> <p>http://store.ncqa.org/index.php/catalog/product/view/id/2776/s/2017-pcmh-standards-and-guidelines-epub/</p> |

| Source | Title | Description and links. |
|--------|---|---|
| NCQA | Education and Training for Patient-Centered Medical Homes and Patient-Centered Specialty Practices. | <p>This page outlines NCQA resources for education and training (both free and paid)</p> <p>http://www.ncqa.org/education-training/pcmh-pcsp</p> |
| NCQA | PCMH Suggested Pathway - Pediatrics Dec 2017.pdf | <p>In this document, NCQA highlights elective credits from the standards and guidelines that may be more applicable to pediatric practices. See attached document – no link.</p> |
| NCQA | PCMH 2017 FAQ_Pediatrics.pdf1 | <p>In this document, NCQA answers Frequently asked questions from pediatric practices working towards NCQA PCMH recognition. See attached document – no link.</p> |
| MGMA | PCMH Guidebook for 2017 | <p>MGMA has published an updated version of their PCMH Guidebook for 2017. The Guidebook includes sample policies and procedures as a reference which may save you some time with policy development. It includes an MSWord file, so you can use the examples as a template.</p> <p>Here are links to MGMA PCMH resources.</p> <ul style="list-style-type: none"> • https://www.mgma.com/products/products/pcmh-policies-procedures-guidebook,-3rd-edition • https://www.mgma.com/resources/resources/products/pcmh-policies-guidebook-and-pcsp-policies-guideboo |

| Source | Title | Description and links. |
|--------|---|---|
| NCQA | Quality Measures Crosswalk for PCMH 2017 | <p>NCQA intends to accept the results of these measures for the 2017 PCMH program.</p> <p>http://www.ncqa.org/portals/0/Programs/Recognition/PCMH/Quality_Measures_Crosswalk.pdf</p> |
| NCQA | NCQA Prevalidation Program | <p>NCQA created the prevalidation program to identify electronic health record (EHR) systems, advanced registries, population health management tools and other related technology solutions that have functionality that helps practices meet NCQA PCMH or PCSP Recognition requirements. Details and FAQs can be found at:</p> <p>http://www.ncqa.org/programs/recognition/prevalidation-program</p> |

Request Support

Your PCMH Support Team:

Caitlin Feller, Terry Laine, Sherrina Gibson

Online:

<http://chcleadership.com/support/>

Phone:

804-673-0166