

## **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). 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
<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
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
<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
TC 08: Behavioral Health Care Manager	Elective (2 Credits)	Shared
<b>Competency C: Medical Home Responsibilities</b>		
<b>TC 09: Medical Home Information</b>	<b>Core</b>	Shared

Knowing and Managing Your Patients (KM) 29 Criteria // 10 Core Criteria // 19 Elective Criteria		
Criteria Name	Core/Elective	Shared or Site-Specific
<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
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
<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
KM 11: Staff Cultural Competence and Health Literacy Skills	Elective (1 Credit)	Shared
<b>Competency C: Addressing Patient Needs</b>		
<b>KM 12: Proactive Outreach</b>	<b>Core</b>	Shared
KM 13: Excellence in Performance	Elective (2 Credits)	Site-Specific
<b>Competency D: Medication Management</b>		
<b>KM 14: Medication Reconciliation</b>	<b>Core</b>	Site-Specific
<b>KM 15: Medication Lists</b>	<b>Core</b>	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
<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>		
<b>KM 21: Community Resource Needs</b>	<b>Core</b>	Shared
KM 22: Access to Educational Resources	Elective (1 Credit)	Shared
KM 23: Oral Health Education	Elective (1 Credit)	Shared
KM 24: Shared Decision-Making Aids	Elective (1 Credit)	Shared
KM 25: School/Intervention Agency Engagement	Elective (1 Credit)	Shared

<b>Knowing and Managing Your Patients (KM)</b> 29 Criteria // 10 Core Criteria // 19 Elective Criteria		
<b>Criteria Name</b>	<b>Core/Elective</b>	<b>Shared or Site-Specific</b>
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
<b>Competency G: Additional Patient Collaboration</b>		
KM 29: Opioid Treatment Agreement	Elective (1 Credit)	Shared

<b>Patient-Centered Access and Continuity (AC)</b> 14 Criteria // 7 Core Criteria // 7 Elective Criteria		
<b>Criteria Name</b>	<b>Core/Elective</b>	<b>Shared or Site-Specific</b>
<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
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
<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
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

<b>Care Management and Support</b> <b>9 Criteria // 4 Core Criteria // 5 Elective Criteria</b>		
Criteria Name	Core/Elective	Shared or Site-Specific
<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
CM 03: Comprehensive Risk-Stratification Process	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
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
<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
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
<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
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
<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
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
<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
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
<b>Competency C: Reporting Performance</b>		
<b>QI 15: Reporting Performance Within the Practice</b>	<b>Core</b>	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