



WACMHC

Washington Association of
Community & Migrant Health Centers

Putting PCMH into Practice: A Transformation Series

The Redesigned Recognition Process

April 25, 2018

WEBINAR FACILITATOR

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HOUSEKEEPING

- Your lines are currently muted
- We'll address questions at the end of the presentation
- You can ask a question in the following ways:



RAISE YOUR HAND FUNCTION - your line will be unmuted and you can ask the question verbally



QUESTIONS FUNCTION – type your question in the box and the facilitator will read it aloud

- This webinar is being recorded. A recording will be sent to you in a follow-up email.

2017 NCQA PCMH Recognition Process



Advancing Healthcare
Improving Health

Objectives

1. Highlight the latest updates in the redesigned process from NCQA
2. Review the NCQA Accelerated Renewal Process & QPASS set up
3. Compare the NCQA Annual Reporting Process and Requirements with the NCQA PCMH 2014 Standards
4. Focus on true transformation – embedding PCMH into the operations of the practice



Reduced Documentation Burden? Maybe

- From 167 factors in 2014 PCMH to 100 “criteria” in 2017 PCMH



2017 Standards

Concepts



Team-Based Care and Practice Organization



Knowing and Managing Your Patients



Patient-Centered Access and Continuity



Care Management and Support

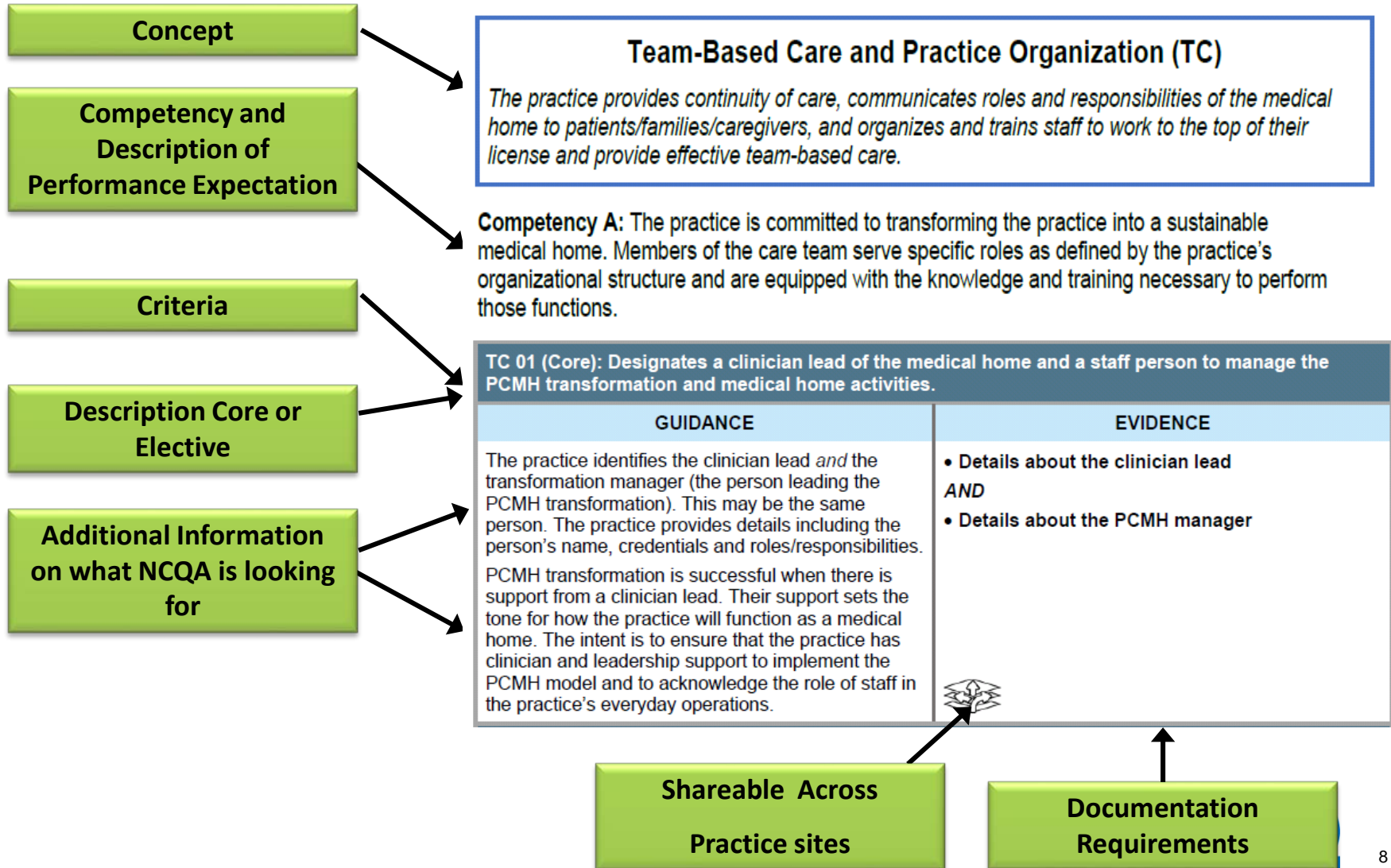


Care Coordination and Care Transitions



Performance Measurement & Quality Improvement

Anatomy of a Standard



2017 Standards

Structure - Example

Concept: Patient-Centered Access and Continuity

Competency	Core Criteria	Elective Criteria
<p>The PCMH model seeks to enhance access by providing appointments and clinical advice based on the patient's needs. In addition to being key to patient-centeredness, evidence explicitly supports that providing enhanced access including same-day, extended hours and telephone advice from clinicians with access to the patient record reduces ED visits and hospitalizations.</p>	<p>Assesses the access needs and preferences of the patient population.</p> <p>Provides same-day appointments for routine and urgent care to meet identified patients' needs.</p> <p>Provides routine and urgent appointments outside regular business hours to meet identified patients' needs.</p> <p>Provides timely clinical advice by telephone.</p> <p>Documents clinical advice in patient records.</p>	<p>Provides scheduled routine or urgent appointments by telephone or other technology supported mechanisms.</p> <p>Has a secure electronic system for patient to request appointments, prescription refills, referrals and test results.</p> <p>Has a secure electronic system for two-way communication to provide timely clinical advice.</p> <p>Evaluates identified health disparities to assess access across the patient population.</p>

Element Standard

Factors

High Level Crosswalk

PCMH 2017 Concept	PCMH 2014 Standard
Team-Based Care and Practice Organization (TC)	Standard 2
Knowing and Managing Your Patients (KM)	Standards 2, 3 and 4
Patient-Centered Access and Continuity (AC)	Standard 1 and 2
Care Management and Support (CM)	Standard 4
Care Coordination and Care Transitions (CC)	Standard 5
Performance Measurement and Quality Improvement (QI)	Standard 6



Three Paths to 2017

Annual Renewal

Previous 2014 level 3

No check in calls required unless selected for audit

Minimal documentation, few reports, QI data, fill out questionnaires in Q-PASS, provide blanket attestation on 2017 compliance

Accelerated Renewal

Previous 2011 level 1, 2 or 3 or Previous 2014 level 1 or 2

Up to three check-in calls with a reviewer

Core - 22 reviewed, 18 available for attestation
Electives – 26 require review, 34 available for attestation

Full Engagement

Previously not recognized or recognition has expired

Up to 3 check-in calls with a reviewer

Documentation and virtual review for 40 core and 25 elective criteria

PCMH 2017 Scoring

- No levels = No add-on surveys
- Pass or Fail
- Reconsideration is still an option
- Meet all core criteria in the program = 40 credits
- Earn 25 credits in elective criteria across 5 of 6 concepts
- 40 + 25 credits = Pass
- Option for Distinction in patient experience reporting, eCQM reporting, and behavioral health integration



Evidence = Documentation

Documentation Key

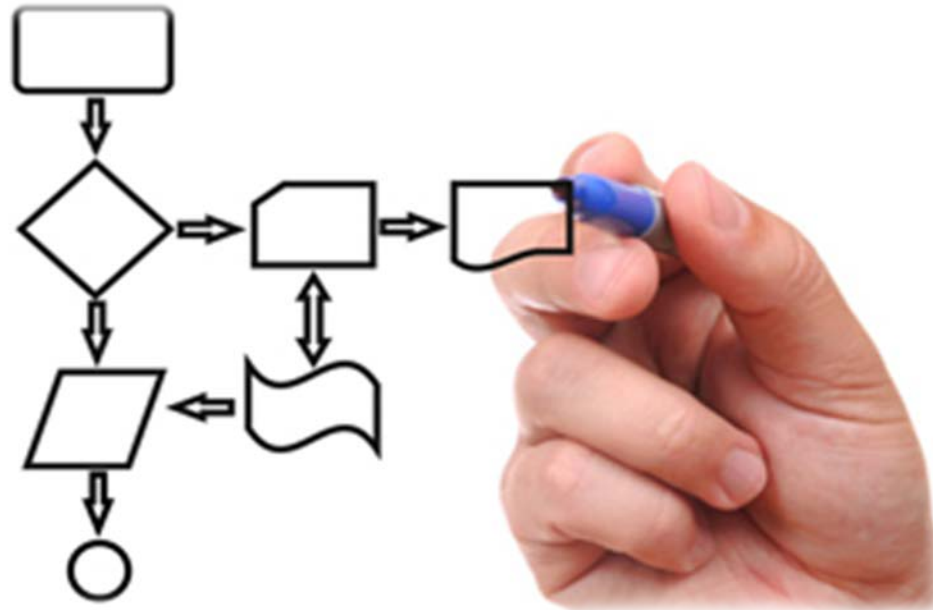


Presentation documentation key:

- Ⓡ - Report
- ⓔ - Evidence
- Ⓟ - Process
- Ⓛ - List
- Ⓢ - Source
- ⓐ - Agreement
- Ⓣ - Protocol
- ⓑ - RRWB
- Ⓦ - Worksheet

New Recognition Process

Risky = Commit, Transform, Succeed?



Better = Transform, Commit, Succeed!



Succeed or Sustain = Annual Process

- Annual data submission and attestation
- Done through Q-PASS and will not require a virtual check-in unless selected for audit
- Multisite practices submit annual data at same time



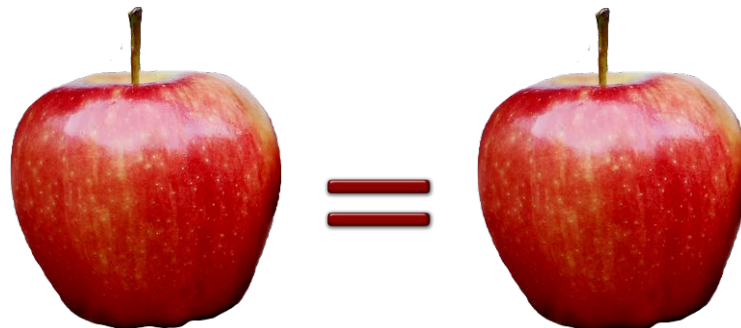
Transform First! Then....

- Register in Q-PASS
- Pay your fees
- Submit evidence via Q-PASS
- Schedule 3 virtual check-in calls over a 12 month period



What Hasn't Changed

- Eligibility Criteria
- 2014 Must Pass Elements are embedded in Core Concepts
- Record Review Workbook
- QMIW
- Types of documentation (Data Sources)
- Multisite Requirement
- Pre-Validation Credits
- Foundation of Medical Home Model



Where to Begin?

- Convene your team!
- Review existing documents that might be used to meet the standards – policies, procedures, workflows, reports
- Compile a list of new documents and processes that need to be created
- Format the documents to communicate clearly to the NCQA Reviewers
- Consider what will be submitted for review and what will be virtual



Organization set-up



New Organizations

- Create Organization in Q-PASS
- Provide Organization details (address, phone, Tax ID)
- Save Organization

Existing Organizations

- Authorized users – See “My Organizations” tab
- To “claim” an organization otherwise, contact NCQA

Q-PASS Organization Home Page

https://qpass.ncqa.org

Recognition Program - NC... | Intro to PCMB 2017 Database ...

NCOA Q-PASS Home Settings Profile

Welcome, William Tulloch, BA

Home

My evaluations My organizations

Organizations

All of your organizations are listed here.

Create or Claim an Organization

5334 Total Organizations

results per page 10

Name ^ v	Phone	Primary	Secondary	Actions
1 Hanson Place Pediatrics PC				Actions -
1/2 SBCT	(210) 295-7419			Actions -
10 MDG USAFA Family Health and Pediatric Clinics	(719) 333-0566			Actions -
1211 WPR	(718) 828-6610			Actions -

Adding an Organization to Q-PASS

The screenshot shows a web browser window with the URL <https://pass.ncqa.org/>. The browser tabs include "Recognition Program - NC..." and "Info to PCMH 2017 Ed/more...". The page header features the NCQA Q-PASS logo, navigation icons (home, edit, settings, checkmark, user), and a user greeting: "Welcome, William Tulloch, BA". Below the header is a breadcrumb trail: "/ Home".

The main content area has two tabs: "My evaluations" and "My organizations", with "My organizations" selected. Below the tabs is a section titled "Organizations" with a sub-header "All of your organizations are listed here." and a button "Create or Claim an Organization".

There are three instructional cards:

- How to add a new organization or claim an existing organization? INSTRUCTIONS
- How to set the primary and secondary contacts? INSTRUCTIONS
- What is my Tax Id Number? INSTRUCTIONS

Below these cards is a section titled "Add an Organization" with the text: "Just add information about your organization below to get set up." and "Search for your organization to ensure it does not already exist before creating a new organization. Please enter at least 4 characters while searching for your organization." Below this text is a search input field with a magnifying glass icon and the placeholder text "Search...".

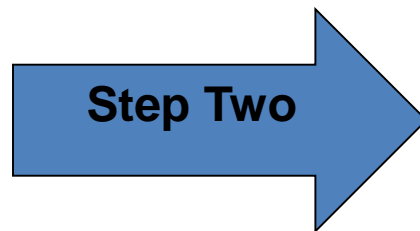
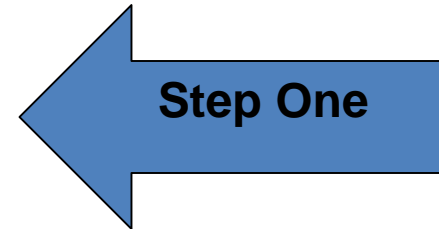
Enrollment

Organization needs the following to enroll

- Site information, including NPI
- Clinician information, including NPI & Boards/specialties
- Authorized signatory for agreements
- Payment method/Discount code



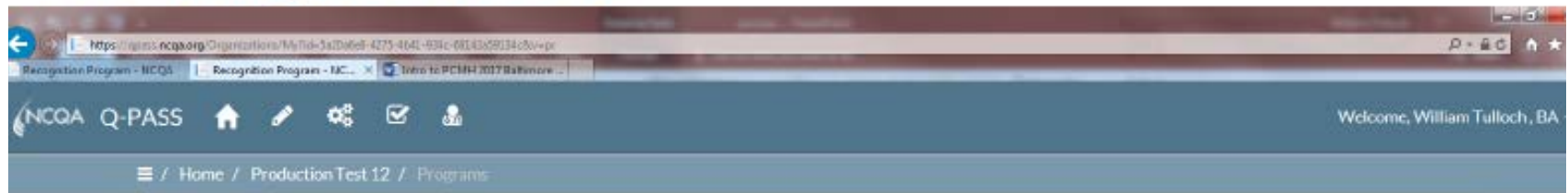
Enrollment



Step-by-Step process in Q-PASS

- Choose sites
- Choose product(s)
- Add/create clinicians
- Sign agreements

Enrolling in Q-PASS



Programs

How to Enroll a Site into a Program?

[INSTRUCTIONS](#)

Select a program to enroll in from the list below.



Patient-Centered Medical Home

Recognized **0** • Enrolled **1**

The patient-centered medical home is a way of organizing primary care that emphasizes care coordination and communication to transform primary care into "what patients want it to be." Medical homes can lead to higher quality and lower costs, and can improve patients' and providers' experience of care.

[Enroll Sites in Program →](#)

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Enrollment – Choose Sites

The screenshot shows a web browser window with the URL <https://pass.ncqa.org/Organizations/Enroll?id=3a20668-4275-4b41-994c-66342a08134c&organizationId=PortHaven>. The page header includes the NCQA Q-PASS logo and navigation icons, and a welcome message for William Tulloch, BA. A sidebar on the left contains a 'Back' button. The main content area features a list of help topics with 'INSTRUCTIONS' links: 'How to add a site?', 'How to Enroll a Site into a Program?', 'How to set a Primary Contact', and 'What is the difference between a Type 1 and Type 2 NPI?'. Below this is a yellow banner with the NCQA logo and the text 'Total Sites to Enroll in PCMH = 1'. A paragraph explains that users can create new practice sites or select existing ones from a list. A 'Create New Site' button is located to the right. A scrollable list on the left shows a selection box for 'Select All/None' and a list item for 'Production Test 1, Site A' located at 'Peabody 20, Massachusetts'. A 'Next' button is visible on the right sidebar. A note at the bottom right of the list area says 'Select a site on the left to show details in this section.' with a magnifying glass icon.

How to add a site? INSTRUCTIONS

How to Enroll a Site into a Program? INSTRUCTIONS

How to set a Primary Contact INSTRUCTIONS

What is the difference between a Type 1 and Type 2 NPI? INSTRUCTIONS

Total Sites to Enroll in PCMH = 1

You can create new practice sites by clicking "Create New Site" below. Once you have created all of your practice sites, you can choose which practice sites you wish to enroll in the area to the left below by selecting the practice sites in the list. If you want to enroll all your listed practice sites, click "Select All/None."

Create New Site

Select Sites below:

Select All/None

SCROLL TO VIEW ALL SITES

Production Test 1, Site A
Peabody 20, Massachusetts

Select a site on the left to show details in this section.

Enrollment – Choose Products

The screenshot shows a web browser window with the URL <https://qpass.ncqa.org/Organizations/Enroll?id=3a206e8-423-4b41-854c-6643a9034c6&programId=PCMH2017>. The browser tabs include "Recognition Program - NC..." and "Intro to PCMH 2017 Refinove...". The page header features the NCQA Q-PASS logo, navigation icons (home, edit, settings, checkmark, user), and a welcome message: "Welcome, William Tulloch, BA".

Step 2: Choose Products

i Here you see all the available products for your practice sites. For most practice sites, this will be limited to the program selected. For practices in some locations, there will be additional products, such as the Massachusetts PCMH PRIME Certification program.

When you are done selecting all your products for your practice sites, click the 'Next' button to the right to continue to the next step in the enrollment process.

Please choose any of the eligible practice sites you would like to add the Patient-Centered Medical Home product:

- Production Test 1, Site A

Please choose any of the eligible practice sites you would like to add the PCMH HPC PRIME product:

- Production Test 1, Site A

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Enrollment – Set Up Clinicians

The screenshot shows a web browser window with the URL <https://pass.ncqa.org/Organizations/Enroll/ta2a206d-4275-4b41-924e-68343e9124c8/programId+PcmhB+c>. The page title is "Recognition Program - NCQA" and the user is logged in as "William Tulloch, BA". The navigation menu includes "Sites", "Products", "Clinicians", "Legal Agreements", "Cost Overview", and "Review".

Step 3: Set Up Clinicians

i For each practice site, set up your clinicians who you wish to be included on the certificate for the program you are enrolling in by clicking 'Manage Clinicians' next to each practice site.

For the PCMH program, only count MDs, DOs, NPs and PAs that: 1) manage a panel of patients and 2) provide primary care for 75% or more of their patients.

When you are done adding all of the clinicians for your practice sites, click the 'Next' button to the right to continue to the next step in the enrollment process.

Site	Clinician Count	Actions
Production Test 1, Site A	1	Manage Clinicians

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Enrollment – Sign Agreements

The screenshot shows the NCQA Q-PASS enrollment portal. The navigation bar includes 'Sites', 'Products', 'Clinicians', 'Legal Agreements', 'Cost Overview', and 'Review'. The main heading is 'Step 4: Sign Legal Agreements'. A red arrow points to the 'Pay Fees' step, which is not explicitly labeled in the text but is implied by the arrow's position and the text 'Pay Fees' written on it.

Step 4: Sign Legal Agreements

There are legal agreements that must be signed by an authorized representative of your organization. That authorized individual may be you or someone else at your organization.

Click on 'View/Sign Agreement' next to each Legal Agreement and follow the instructions. If you cannot sign the legal agreements now, they must be signed by someone else. Once signed, you can begin uploading evidence to the system or access your evaluations.

When you are done signing the legal agreements or designating someone else to sign them, click the 'Next' button to the right to continue to the next step in the enrollment process.

How to sign legal agreements INSTRUCTIONS

There are 2 agreements that need to be signed.

Click on an Agreement to view the PDF. You will require Adobe Acrobat Reader to view PDF.
[Download Adobe Acrobat Reader](#)

Agreement	Is Signed	Signed By	Date Signed	View/Sign Agreement
PCMH 2017 Agreement	Signed	Bill Tull	4/12/2017	View/Sign Agreement
Business Associate Agreement	Signed	Bill Tull	4/12/2017	View/Sign Agreement

After Enrollment

Subtitle

NCQA will assign a representative to the practice

The practice should then address:



Transfer credit

- Pre-validated vendors & transfer-credits
 - Choose vendor with existing auto-credit
 - Vendor supplies implementation letter confirming eligibility
 - Criteria set as “Met” after confirmation by Representative

Shared credit

- Organizations with multiple sites
- Share evidence/credit for criteria done the same
- Create sub-groups if share different EHR/processes

**Transfer Credits ?
Shared Credits ?
Site Groups ?
Multi-site ?**

Multi-Site Process



- **Organizations with 3+ sites**
- **Shared EHR**, processes and evidence across sites
- **Identify shared criteria** from “sharable list”
- Identify primary site
 - Full review only for this site
 - Shared criteria auto-populate in subsequent sites

Transform “Check-in” process

Up to 3 “Check-ins” During Review

For practices new to NCQA or doing an accelerated renewal



Determine Criteria to Address

- Focus on core & documented processes first
- Identify criteria for 25 elective credits



Provide Documents for Offsite Review

- Policies, procedures & protocols
- Website links
- Public information
- Attestation



Provide Evidence during Virtual Review

- Communicate with Evaluator
- Substitute evidence if not sufficient
- Demo systems
- Provide reports

After Check-In



- Evaluator marks criteria “met”
- Practice can work on “not met” criteria
- NCQA staff will review questions arising from check-in

After 3 Check-Ins



Practice meets all core criteria & 25 elective credits, results are forwarded to Review Oversight Committee (ROC)



If required criteria is not met in 3 virtual check-ins, an additional check-in is available for purchase



If the survey process is not completed within 12 months, additional time can be purchased

Accelerated Renewal

What is expected for criteria?



For criteria identified as review practices should:

- Follow standards & guidelines
- Submit evidence in Q-PASS
- Prepare to demonstrate virtual review-eligible evidence



For criteria marked attestation the practice should:

- Attest that your practice is still performing PCMH activities
- You will not need to demonstrate documentation or evidence

Criteria are identified as shared or site specific

Accelerated Renewal Table

	Core	Electives		
		1 Credit	2 Credits	3 Credits
Review	22 criteria	12 criteria	14 criteria	0 criteria
Attestation	18 criteria	26 criteria	7 criteria	1 criterion
Total Criteria (100 criteria)	40 criteria	39 criteria	20 criteria	1 criterion

TEAM-BASED CARE AND PRACTICE ORGANIZATION (TC)			
Criteria	Criteria Title	Shared or Site-Specific?	Review or Attestation?
Competency A: Practice Organization, Team Roles and Training			
TC 01* (Core)	PCMH Transformation Leads	Shared	Review
TC 02 (Core)	Structure & Staff Responsibilities	Shared	Attestation
TC 03* (1 Credit)	External PCMH Collaborations	Shared	Attestation
TC 04* (2 Credits)	Patient/Family/Caregiver Involvement in Governance	Shared	Review
TC 05 (2 Credits)	Certified EHR System	Shared	Attestation

Succeed Annual Reporting Process

Practice's recognized PCMH 2014 Level 3 or after Transform process must:

Attest to previous performance	Confirm practice information and make any clinician changes
Provide evidence demonstrating continuing PCMH Activities	Annual fee payment/discount code from HRSA

Annual Reporting Date

- **30 days** before Anniversary Date
- Must complete all Succeed steps prior to anniversary date
- **Date set upon initial Recognition**
 - Or 2014 Level 3 expiration date
- **Flexibility** to meet practice needs



Annual Reporting Date – Multi-sites



All practices in multi-site group have the same annual reporting date, unless otherwise organization requests differently



The annual reporting date for multi-site group is based on the date of 1st Recognized practice

Evidence & Annual Reporting



- **Evidence can be provided** at any point within the year
- NCQA will only review after:
 - **Reporting date has passed**
 - **NOI Approved**



Annual Requirements

- AR - PA (Patient Access) – appointment monitoring or patient experience
- AR – TC (Team-based Care) – pre-visit planning processes or care team experience
- AR – PH (Population Health) – proactive reminders, how many and how often?
- AR – CM (Care Management) – criteria, number of patients on care management, per cent of total population



Annual Requirements

- AR – CC (Care Coordination) care coordination processes for lab, imaging, referrals and care transitions. Provide data for one of the previous categories or patient experience survey results for CC measures.
- AR – QI (Quality Improvement) provide quality improvement measures for clinical quality, resource stewardship and patient experience measures.



Audit and New Requirements



Audit

- Sample of Succeed practices selected
- Still meeting key Transform criteria?
- Selection after Annual Reporting complete

New Requirements

- Announced one year ahead
- Practice must meet at next reporting date

Get Answers to Your Questions

- What are the new requirements
- How to ask questions of NCQA when needed
- Key updates and items requiring documented history
- Understand if past standards will be expected to be carried over, especially care management plan for important populations from prior application



Where Can I Learn More?

- [Recognition Program - NCQA Q-Pass](#)
- [NCQA seminars-and-webinars/live-seminars-webinars](#)
- [What to Expect During a Virtual Review](#)
- [GRIP Program Resource Page](#)
- [NCQA PCMH 2017 Getting Started Page](#)
- [MyNCQA.org](#)
- [WACMHC PCMH Assistance](#)



Join us for the Series!

Team Based Care and Practice Organization (TC)

Wednesday, May 16, 12-1 PM

[REGISTER HERE](#)

Learning Objectives:

- Describe the relationship between the Change Concepts for Practice Transformation "Team-Based Healing Relationships" and the NCQA PCMH recognition requirements for "Team-Based Care (TC)"
- Identify current processes within your practice that align with the NCQA requirements

Upcoming WACMHC Trainings

Lean Boot Camp

Seattle, WA

May 8, 8:30 AM – 4 PM

[REGISTER](#)

Residency Development Seminar

Portland, OR

May 18

[REGISTER](#)

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Questions? Contact the WACMHC Practice Transformation Team at
QualityImprove@wacmhc.org