Patient-Centered Medical Home (PCMH) Suggested Path to Recognition for Pediatric Practices



This document contains a suggested path to earning NCQA PCMH Recognition, including which criteria might be best to demonstrate at earlier and later virtual review sessions.

The tables below suggest which criteria a practice might demonstrate for each virtual review. Practices are not required to follow the suggestions. NCQA assumes that the practice has not attested to criteria through Accelerated Renewal or received transfer credit from prevalidated vendors. A practice that is attesting to criteria or using a prevalidated vendor may be able to move additional criteria to earlier check-ins.

To earn recognition, practices must:

- 1. Meet all 40 core criteria, and
- 2. Earn 25 credits in elective criteria across 5 of 6 concepts.

Multi-sites: Shared and Site-Specific Evidence

Some evidence (e.g., documented processes, demonstration of capability) may be shared and submitted once for all sites or site groups.

Other evidence (e.g., reports, Record Review Workbooks, Quality Improvement Workbooks) must be site-specific. Site-specific data may be combined and submitted once on behalf of all sites or site groups. Some criteria require a combination of shared and site-specific evidence, which is indicated as partially shared in the tables below.

NCQA suggests that multi-site groups demonstrate shared criteria during the first virtual review and demonstrate all site-specific evidence for all sites at the subsequent virtual reviews.



= Evidence is shareable across practice sites



= Evidence may be shared virtually during virtual reviews



= Evidence may be partially shared



= Reports may be shared virtual during virtual reviews



= Suggested as good elective for pediatric practices

Overview of Criteria and Credits Allocated								
	Coro		Electives					
	Core	1 Credit	2 Credits	3 Credits				
Total Criteria (101 criteria)	40 criteria	39 criteria	21 criteria	1 criterion				



	TEAM-B	ASED CARE AND PRACTICE ORGANIZATION (T	C)			
sustainable m	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			VIRTUAL REVIEW #		
	e's organizational st ssary to perform thos		1	2	3	
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.	✓			
TC 02 (Core)	Structure & Staff Responsibilities	Defines practice organizational structure and staff responsibilities/ skills to support key PCMH functions.	√			
TC 03 (1 Credit)	External PCMH Collaborations	The practice is involved in external PCMH- oriented collaborative activities (e.g., federal/state initiatives, health information exchanges).			√	
TC 04 (2 Credits)	Patient/Family/ Caregiver Involvement in Governance	Patients/families/caregivers are involved in the practice's governance structure or on stakeholder committees.		U ₃		
TC 05 (2 Credits)	Certified EHR System	The practice uses an EHR system (or modules) that has been certified and issued an ONC Certification ID, conducts a security risk analysis and implements security updates as necessary correcting identified security deficiencies.	Ų,			
•		among staff is organized to ensure that patient	VIRT	JAL REV	IEW#	
care is coordi	nated, safe and effe	ctive.	1	2	3	
TC 06 (Core) **	Individual Patient Care Meetings/ Communication	Has regular patient care team meetings or a structured communication process focused on individual patient care.	√			
TC 07 (Core)	Staff Involvement in Quality Improvement	Involves care team staff in the practice's performance evaluation and quality improvement activities.	√			
TC 08 (2 Credits)	Behavioral Health Care Manager	Has at least one care manager qualified to identify and coordinate behavioral health needs.		√		
	Wanager					



and their role	in the medical hom	e model of care.		1	2	3
TC 09 (Core)	Medical Home Information	Has a process for informing patients/ families/caregivers about the role of t home and provides patients/ families/ with materials that contain the information	caregivers	√		
Core Review: 2 criteria Core Attestation: 3 criteria		1 Credit Review: 0 criteria 1 Credit Attestation: 1 criteria	2 Credit Review: 2 criteria 2 Credit Attestation: 1 criteria		a	

	KNOWING AND MANAGING YOUR PATIENTS (KM)								
understand back	Competency A: Practice routinely collects comprehensive data on patients to understand background and health risks of patients. Practice uses information on the population to implement needed interventions, tools and supports for the practice as			VIRTUAL REVIEW #					
	pecific individuals.		1	2	3				
KM 01 (Core)	Problem Lists	Documents an up-to-date problem list for each patient with current and active diagnoses.	√						
KM 02 (Core)	Comprehensive Health Assessment	Comprehensive health assessment includes (all items required): A. Medical history of patient and family B. Mental health/substance use history of patient and family C. Family/social/cultural characteristics D. Communication needs. E. Behaviors affecting health F. Social functioning G. Social Determinants of Health H. Developmental screening using a standardized tool. (NA for practices with no pediatric population under 30 months of age.) I. Advance care planning. (NA for pediatric practices)	√						
KM 03 (Core)	Depression Screening	Conducts depression screenings for adults and adolescents using a standardized tool.	√						



KM 04 (1 Credit)	Behavioral Health Screenings	Conducts behavioral health screenings and/or assessments using a standardized tool. (implement two or more) A. Anxiety. B. Alcohol use disorder. C. Substance use disorder. D. Pediatric behavioral health screening. E. Post-traumatic stress disorder. F. ADHD. G. Postpartum depression.	U ₁		
KM 05 (1 Credit)	Oral Health Assessment & Services	Assesses oral health needs and provides necessary services during the care visit based on evidence-based guidelines or coordinates with oral health partners.	Ų _{je}		
KM 06 (1 Credit)	Predominant Conditions & Concerns	Identifies the predominant conditions and health concerns of the patient population.		U ₃	
KM 07 (2 Credits)	Social Determinants of Health	Understands social determinants of health for patients, monitors at the population level and implements care interventions based on these data. Resources: Suggested tools for screening for basic and social needs: https://www.aap.org/en-us/advocacy-and-policy/aap-health-initiatives/poverty/Pages/practice-tips.aspx			
KM 08 (1 Credit)	Patient Materials	Evaluates patient population demographics/communication preferences/health literacy to tailor development and distribution of patient materials. Resources: https://medicalhomeinfo.aap.org/tools-resources/Documents/LanguageAccessFINAL.pdf https://medicalhomeinfo.aap.org/tools-resources/Documents/RI%20FactSheet.pdf		Ų,	



•	Competency B: The practice seeks to meet the needs of a diverse patient population y understanding the population's unique characteristics and language needs. The		VIRTU	JAL REV	IEW#
		unique characteristics and language needs. The sure linguistic and other patient needs are met.	1	2	3
KM 09 (Core)	Diversity	Assesses the diversity (race, ethnicity and one other aspect of diversity) of its population.	√		
KM 10 (Core)	Language	Assesses the language needs of its population.	√		
KM 11 (1 Credit)	Population Needs	Identifies and addresses population-level needs based on the diversity of the practice and the community (demonstrate at least 2): A. Target population health management on disparities in care. * B. Address health literacy of the practice. C. Educate practice staff in cultural competence.			√
Competency (C: The practice proa	ctively addresses the care needs of the patient	VIRTU	I JAL REV	IEW#
	nsure needs are me		1	2	3
KM 12 (Core)	Proactive Reminders	Proactively and routinely identifies populations of patients and reminds them, or their families/caregivers about needed services (must report at least 3 categories): A. Preventive care services. B. Immunizations. C. Chronic or acute care services. D. Patients not recently seen by the practice. Resource: AAP Practice Transformation Implementation Guide: Population Health https://www.aap.org/en-us/professional-resources/practice-transformation/Implementation-Guide/Pages/Population-Health.aspx	✓		
KM 13 (2 Credits)	Excellence in Performance	Demonstrates excellence in a benchmarked/performance-based recognition program assessed using evidence-based care guidelines.			√



		resses medication safety and adherence by	VIRTU	JAL RE\	/IEW #
		t and establishing processes for medication assessment of barriers.	1	2	3
KM 14 (Core)	Medication Reconciliation	Reviews and reconciles medications for more than 80 percent of patients received from care transitions.		√	
KM 15 (Core)	Medication Lists	Maintains an up-to-date list of medications for more than 80 percent of patients.		✓	
KM 16 (1 Credit)	New Prescription Education	Assesses understanding and provides education, as needed, on new prescriptions for more than 50 percent of patients/families/caregivers.		√	
KM 17 (1 Credit)	Medication Responses & Barriers	Assesses and addresses patient response to medications and barriers to adherence for more than 50 percent of patients and dates the assessment.		√	
KM 18 (1 Credit)	Controlled Substance Database Review	Reviews controlled substance database when prescribing relevant medications.			Ų _j
KM 19 (2 Credits)	Prescription Claims Data	Systematically obtains prescription claims data in order to assess and address medication adherence.			✓
across a variet		rporates evidence-based clinical decision support asure effective and efficient care is provided to		JAL RE\	
patients.	Clinical	Implements clinical decision support following	1	2	3
(Core)	Decision Support	evidence-based guidelines for care of (must demonstrate at least 4 criteria): A. Mental health condition. B. Substance use disorder. C. A chronic medical condition. D. An acute condition. E. A condition related to unhealthy behaviors. F. Well child or adult care. G. Overuse/appropriateness issues.		√	



		tifies/considers and establishes connect		VIRTUAL REV		/IEW #
community resc	ources to collaborat	e and direct patients to needed support.		1	2	3
KM 21 (Core)	Community Resource Needs	Uses information on the population se the practice to prioritize needed commresources.		√		
KM 22 (1 Credit)	Access to Educational Resources	Provides access to educational resour as materials, peer-support sessions, g classes, online self-management tools programs.	group		Ų _{je}	
KM 23 (1 Credit)	Oral Health Education	Provides oral health education resource patients.	ces to			Ų
KM 24 (1 Credit)	Shared Decision- Making Aids	Adopts shared decision-making aids for preference-sensitive conditions.	or			✓
KM 25 (1 Credit)	School/ Intervention Agency Engagement	Engages with schools or intervention a the community.	agencies in			Ų
KM 26 (1 Credit)	Community Resource List	Routinely maintains a current communication resource list based on the needs identificated Core KM 21.			Ų _{je}	
KM 27 (1 Credit)	Community Resource Assessment	Assesses the usefulness of identified support resources.	community			Ų,
KM 28 (2 Credits)	Case Conferences	Has regular "case conferences" involv outside the practice team (e.g., comm supports, specialists).			✓	
Competency G	: The practice colla	aborates with patients to support their s	pecific	VIRTU	JAL REV	/IEW#
Heeus.				1	2	3
KM 29 (1 Credit)	Opioid Treatment Agreement	For patients prescribed Schedule II opprescriptions, incorporates opioid trea agreement into the patient medical re-	ıtment			✓
Core Review: 4	criteria	1 Credit Review: 7 criteria	2 Credit Re	eview: 4	criteria	
Core Attestation	n: 6 criteria	1 Credit Attestation: 8 criteria	2 Credit At	testation	n: 0 crite	ria



	PATIENT-CENTERED ACCESS AND CONTINUITY (AC)							
	Competency A: The practice seeks to enhance access by providing appointments and clinical advice based on patients' needs.			JAL REV	IEW#			
and clinical advi	ce based on patier	nts needs.	1	2	3			
AC 01 (Core)	Access Needs & Preferences	Assesses the access needs and preferences of the patient population.	✓					
AC 02 (Core)	Same-Day Appointments	Provides same-day appointments for routine and urgent care to meet identified patients' needs.	✓					
AC 03 (Core)	Appointments Outside Business Hours	Provides routine and urgent appointments outside regular business hours to meet identified patient needs.	✓					
AC 04 (Core)	Timely Clinical Advice by Telephone	Provides timely clinical advice by telephone.	✓					
AC 05 (Core)	Clinical Advice Documentatio n	Documents clinical advice in patient records and confirms clinical advice and care provided after-hours does not conflict with patient medical record.	✓					
AC 06 (1 Credit)	Alternative Appointments	Provides scheduled routine or urgent appointments by telephone or other technology supported mechanisms.		√				
AC 07 (1 Credit)	Electronic Patient Requests	Has a secure electronic system for patients to request appointments, prescription refills, referrals and test results.			✓			
AC 08 (1 Credit)	Two-Way Electronic Communica- tion	Has a secure electronic system for two-way communication to provide timely clinical advice.			✓			
AC 09 (1 Credit)	Equity of Access	Uses information on the population served by the practice to assess equity of access that considers health disparities.			✓			



		continuity through empanelment and systematic	VIRT	UAL REV	IEW#
access to the pat	ient's medical rec	ord.	1	2	3
AC 10 (Core)	Personal Clinician Selection	Helps patients/families/caregivers select or change a personal clinician.	✓		
AC 11 (Core)	Patient Visits with Clinician/ Team	Sets goals and monitors the percentage of patient visits with selected clinician or team.		✓	
AC 12 (2 Credits)	Continuity of Medical Record Information	Provides continuity of medical record information for care and advice when the office is closed.	Ų.		
AC 13 (1 Credit)	Panel Size Review & Management	Reviews and actively manages panel sizes.		Ų	
AC 14 (1 Credit)	External Panel Review & Reconciliation	Reviews and reconciles panel based on health plan or other outside patient assignments. Resource: Webpage includes a brief tutorial for how to compare lists in Excel. http://tnscriptdoctor.com/excel-tips-and-tricks/			√
Core Review: 3 o			Review: 0		
Core Attestation	i: 4 criteria 1	Credit Attestation: 3 criteria 2 Credit	Attestatio	n : 1 criteri	a



	C	ARE MANAGEMENT AND SUPPORT (CM)			
		ematically identifies patients that would benefit	VIRT	UAL REVI	EW#
most from care	management.		1	2	3
CM 01 (Core)	Identifying Patients for Care Management	Considers the following when establishing a systematic process and criteria for identifying patients who may benefit from care management (practice must include at least 3 in its criteria): A. Behavioral health conditions B. High cost/high utilization C. Poorly controlled or complex conditions D. Social determinants of health E. Referrals by outside organizations (e.g., insurers, health system, ACO), practice staff or patient/family/ caregiver	√		
CM 02 (Core)	Monitoring Patients for Care Management	Monitors the percentage of the total patient population identified through its process and criteria.	√		
CM 03 (2 Credits)	Comprehensive Risk- Stratification Process	Applies a comprehensive risk-stratification process to entire patient panel in order to identify and direct resources appropriately.		√	
consistently us	es patient information	cified for care management, the practice on and collaborates with patients/families/	VIRTUAL REVIEW		EW#
		hat addresses barriers and incorporates patient cumented in the patient's chart.	1	2	3
CM 04 (Core)	Person- Centered Care Plans	Establishes a person-centered care plan for patients identified for care management.		√	
CM 05 (Core)	Written Care Plans	Provides written care plan to the patient/family/caregiver for patients identified for care management.		✓	
CM 06 (1 Credit)	Patient Preferences & Goals	Documents patient preference and functional/lifestyle goals in individual care plans.		√	



CM 07 (1 Credit)	Patient Barriers to Goals	Identifies and discusses potential barri meeting goals in individual care plans.		Ų.	
CM 08 (1 Credit)	Self- Management Plans	Includes a self-management plan in incare plans.	dividual	Ų,	
CM 09 (1 Credit)	Care Plan Integration	Care plan is integrated and accessible settings of care.	across		✓
Core Review: 2 criteria Core Attestation: 2 criteria		1 Credit Review: 1 criterion 1 Credit Attestation: 3 criteria	2 Credit Review: 2 Credit Attestati		a

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CARE COORDINATION AND CARE TRANSITIONS (CC)						
Competency A: The practice effectively tracks and manages laboratory and imaging tests important for patient care and informs patients of the result.			VIRTUAL REVIEW #			
			1	2	3	
CC 01 (Core)	Lab & Imaging Test Management	 The practice systematically manages lab and imaging tests by: A. Tracking lab tests until results are available, flagging and following up on overdue results. B. Tracking imaging tests until results are available, flagging and following up on overdue results. C. Flagging abnormal lab results, bringing them to the attention of the clinician. D. Flagging abnormal imaging results, bringing them to the attention of the clinician. E. Notifying patients/families/ caregivers of normal lab and imaging test results. F. Notifying patients/families/ caregivers of abnormal lab and imaging test results. 	✓			
CC 02 (1 Credit)	Newborn Screenings	Follows up with the inpatient facility about newborn hearing and newborn blood-spot screening.	U ₃			
CC 03 (2 Credits)	Appropriate Use for Labs & Imaging	Uses clinical protocols to determine when imaging and lab tests are necessary.		Ü		
	Competency B: The practice provides important information in referrals to specialists and tracks referrals until the report is received.			RTUAL REVIEW #		
CC 04 (Core)	<u> </u>	The practice systematically manages referrals by: A. Giving the consultant or specialist the clinical question, the required timing and the type of referral B. Giving the consultant or specialist pertinent demographic and clinical data, including test results and the current care plan C. Tracking referrals until the consultant or specialist's report is available, flagging and following up on overdue reports	1	2	3	
CC 05 (2 Credits)	Appropriate Referrals	Uses clinical protocols to determine when a referral to a specialist is necessary.		√		



	_		1	1	
CC 06 (1 Credit)	Commonly Used Specialists Identification	Identifies the specialists/specialty types most commonly used by the practice.		Ú.	
CC 07 (2 Credits)	Performance Information for Specialist Referrals	Considers available performance information on consultants/ specialists when making referrals.		√	
CC 08 (1 Credit)	Specialist Referral Expectations	Works with nonbehavioral healthcare specialists to whom the practice frequently refers to set expectations for information sharing and patient care.	√		
CC 09 (2 Credits)	Behavioral Health Referral Expectations	Works with behavioral healthcare providers to whom the practice frequently refers to set expectations for information sharing and patient care.		√	
CC 10 (2 Credits)	Behavioral Health Integration	Integrates behavioral healthcare providers into the care delivery system of the practice site.		√	
CC 11 (1 Credit)	Referral Monitoring	Monitors the timeliness and quality of the referral response.	✓		
CC 12 (1 Credit)	Co- Management Arrangements	Documents co-management arrangements in the patient's medical record.		✓	
CC 13 (2 Credits)	Connects to Financial Resources	Engages with patients regarding cost implications of treatment options, provides information about current coverage and makes connections to financial resources as needed.			✓
Competency C: The practice connects with other health care facilities to support patient safety throughout care transitions. The practice receives and shares			VIRTUAL REVIEW #		
, , , , , , , , , , , , , , , , , , ,	necessary patient treatment information to coordinate comprehensive patient care.			2	3
CC 14 (Core)	Identifying Unplanned Hospital & ED Visits	Systematically identifies patients with unplanned hospital admissions and emergency department visits.	✓		

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CC 15 (Core)	Sharing Clinical Information	Shares clinical information with a hospitals and emergency departs			✓	
CC 16 (Core)	Post-Hospital/ ED Visit Follow-Up	Contacts patients/families/caregi up care, if needed, within an app following a hospital admission or department visit.	ropriate period	✓		
CC 17 (1 Credit)	Acute Care After Hours Coordination	Systematic ability to coordinate visettings after hours through accepatient information.				U
CC 18 (1 Credit)	Information Exchange during Hospitalization	Exchanges patient information w during a patient's hospitalization.				√
CC 19 (1 Credit)	Patient Discharge Summaries	Implements process to consister patient discharge summaries from and other facilities.			~	
CC 20 (1 Credit)	Care Plan Collaboration for Practice Transitions	Collaborates with the patient/fami develop/ implement a written care complex patients transferring into practice (e.g., from pediatric care	plan for out of the		Ų.	
CC 21 (Maximum 3 Credits)	External Electronic Exchange of Information	Demonstrates electronic exchang with external entities, agencies an (may select 1 or more): A. Regional health information or other health information exchaenhances the practice's ability complex patients. (1 Credit) B B. Immunization registries or imminformation systems. (1 Credit) C. Summary of care record to and care facility for care transitions	ganization or unge source that to manage nunization other provider or			(B.)
Core Review: 2 criteria Core Attestation: 3 criteria		1 Credit Review: 2 criteria 1 Credit Attestation: 7 criteria	2 Credit Review: 3 Cred 5 criteria Attest		3 Credi Attesta 1 criterio	tion:



Competency A: The practice measures to understand current performance and to identify opportunities for improvement.			VIRTUAL REVIEW #		
			1	2	3
QI 01 (Core)	Clinical Quality Measures	Monitors at least five clinical quality measures across the four categories (must monitor at least 1 measure of each type): A. Immunization measures. B. Other preventive care measures. C. Chronic or acute care clinical measures. D. Behavioral health measures. *	√		
QI 02 (Core)	Resource Stewardship Measures	Monitors at least two measures of resource stewardship (must monitor at least 1 measure of each type): A. Measures related to care coordination. B. Measures affecting health care costs.	√		
QI 03 (Core) **	Appointment Availability Assessment	Assesses performance on availability of major appointment types to meet patient needs and preferences for access.	√		
QI 04 (Core)	Patient Experience Feedback	Monitors patient experience through: A. Quantitative data: Conducts a survey (using any instrument) to evaluate patient/family/ caregiver experiences across at least three dimensions, such as: • Access. • Communication. • Coordination. • Whole person care, self-management support and comprehensiveness. B. Qualitative data: Obtains feedback from patients/ families/caregivers through qualitative means	✓		
QI 05 (1 Credit)	Health Disparities Assessment	Assesses health disparities using performance data stratified for vulnerable populations. (must choose one from each section): A. Clinical quality B. Patient experience		√	
QI 06 (1 Credit)	Validated Patient Experience Survey Use	The practice uses a standardized, validated patient experience survey tool with benchmarking data available.			Ü,



QI 07 (2 Credits)	Vulnerable Patient Feedback	The practice obtains feedback on experiences of vulnerable patient groups.		Ų,		
	Competency B: The practice evaluates its performance against goals or benchmarks and uses the results to prioritize and implement improvement strategies			VIRTUAL REVIEW #		
QI 08 (Core)	Goals & Actions to Improve Clinical Quality Measures	Sets goals and acts to improve upon at least three measures across at least three of the four categories: A. Immunization measures. B. Other preventive care measures. C. Chronic or acute care clinical measures. D. Behavioral health measures. *		√		
QI 09 (Core)	Goals & Actions to Improve Resource Stewardship Measures	Sets goals and acts to improve upon at least one measure of resource stewardship: A. Measures related to care coordination. B. Measures affecting health care costs.		√		
QI 10 (Core)	Goals & Actions to Improve Appointment Availability	Sets goals and acts to improve on availability of major appointment types to meet patient needs and preferences.		√		
QI 11 (Core)	Goals & Actions to Improve Patient Experience	Sets goals and acts to improve on at least 1 patient experience measure.		√		
QI 12 (2 Credits)	Improved Performance	Achieves improved performance on at least 2 performance measures.			U ₁	
QI 13 (1 Credit)	Goals & Actions to Improve Disparities in Care/Service	Sets goals and acts to improve disparities in care or services on at least 1 measure.		√		
QI 14 (2 Credits)	Improved Performance for Disparities in Care/Service	Achieves improved performance on at least 1 measure of disparities in care or service.			✓	



Competency C : The practice is accountable for performance. The practice shares performance data with the practice, patients and/or publicly for the measures and			VIRTUAL REVIEW #		
patient populations identified in the previous section.		1	2	3	
QI 15 (Core)	Reporting Performance within the Practice	Reports practice-level or individual clinician performance results within the practice for measures reported by the practice.	✓		
QI 16 (1 Credit)	Reporting Performance Publicly or with Patients	Reports practice-level or individual clinician performance results publicly or with patients for measures reported by the practice.		O.	
QI 17 (2 Credits)	Patient/Family/ Caregiver Involvement in Quality Improvement	Involves patient/family/caregiver in quality improvement activities.		U ₀	
QI 18 (2 Credits)	Reporting Performance Measures to Medicare/ Medicaid	Reports clinical quality measures to Medicare or Medicaid agency.			✓
QI 19 (Maximum 2 credits)	Value-Based Payment Arrangements Up-Side Risk Two-Sided Risk	Is engaged in a Value-Based Payment Arrangement (Maximum 2 credits) A. Practice engages in up-side risk (1 credit) B. Practice engages in two-sided risk (2 credits)			✓
	Core Review: 9 criteria1 Credit Review: 0 criteria2 Credit Review: 2 criteriaCore Attestation: 0 criteria1 Credit Attestation: 4 criteria2 Credit Attestation: 4 criteria				