

**Step 1. Review vision and mission of your organization and examine alignment with the PCMH model**

- Understand population and define Patient Centered Care
- Use practice assessment tools and resources (see PCMH Resource Catalogue for recommended tools)

**Step 2. Organizational leadership (CEO, CMO, CFO, COO and board member) endorses the PCMH model and engages in commitment to pursue this process**

Leadership has informed consideration that the PCMH recognition process will require increased time, personnel and costs, which may lead to decreased productivity. Many states and insurers have incentive plans and payment reform to balance investment. Refer to: *Paying for the Medical Home: Payment Models to Support Patient-Centered Medical Home Transformation in the Safety Net*. Safety Net Medical Home Initiative. Bailit M, Phillips K, Long A. Bailit Health Purchasing and Qualis Health, Seattle, WA: October 2010.

**Step 3. Complete HRSA PCMH NOI, <http://www.bphc.hrsa.gov/policy/pal1101>**

HRSA's PCMH Initiative encourages its grantees (330h) to apply for NCQA recognition and will cover the costs of the NCQA survey tools and recognition fees. HRSA will provide a PCMH training/mentoring program to support practice transformation. Organizations interested in HRSA support for initial NCQA PCMH recognition under the PCMH Initiative must complete a Notice of Intent (NOI) and submit via email to [PCMHInitiative@hrsa.gov](mailto:PCMHInitiative@hrsa.gov). The application deadline for HRSA support is September 30, 2011.

**Step 4. Build and Define PCMH Team**

This should include a clinician champion, IT/reporting lead, Administrator/practice manager, Nursing representative, Patient representative. Assign a full time project manager. Identify roles for Integration/Implementation plan.

**Step 5. Download NCQA Application for Patient-Centered Medical Home and NCQA 2011 Standards**

The application materials include an overview of the PCMH program, eligibility criteria and pricing information. The free 2011 PCMH online application is available at <http://www.ncqa.org>.

**Step 6. Purchase NCQA Interactive Survey Tool (ISS Tool \$80.00)**

Visit <http://www.ncqa.org>, or contact the NCQA project liaison at [PCMH-GRIP@ncqa.org](mailto:PCMH-GRIP@ncqa.org) or 888-275-7585.

- Review practice workflows and processes
  - "Is the right person doing the right work?"
  - Collect and review practice documentation: records/reports/policies and procedures
- Evaluate process for data capture and quality improvement

**Step 7. Assign responsibilities and dates for task completion in order to meet NCQA Project Planning Guide**

A helpful task calendar template can be located in the *Primary Care Development Corporation Patient-Centered Medical Home Assessment Tool and Manual, A Guide for Obtaining PPC-PCMH Recognition for Safety-Net Providers*, [http://www.pcdcnyc.org/data/org/128/media/doc/8045\\_master\\_manual.pdf](http://www.pcdcnyc.org/data/org/128/media/doc/8045_master_manual.pdf).

**Step 8. Set up Ongoing Communication Plan for providers, staff, administration, and patients**

Communicate with staff through multiple venues via email, open forum, weekly reminders and staff meetings.

**Step 9. Prepare Documentation for NCQA submission**

- Create NCQA folder
- Develop checklist of documentation completed
- Develop reports for auditing