



The NCQA Patient-Centered Medical Home (PCMH) Recognition Process

Before you start:

- All PCMH materials can be obtained from <http://www.ncqa.org/tabid/631/Default.aspx> or call (888) 275-7585, M-F, 8:30 a.m. – 5:00 p.m. ET.
- We recommend that you order the **PCMH 2011** Standards and Guidelines (free) and receive training (work through step 4c below) before you order any other materials.
- Later, you will need to order both a PCMH online application (free) and an electronic survey tool (The Interactive Survey System, or ISS, PCMH tool, \$80@) for PCMH submissions.
- Practices may use the Standards and Guidelines to self-assess prior to submitting to NCQA. However, the survey tool must be submitted online (instructions follow).
- After you order the online application and survey tool, NCQA will send you a response e-mail for each order. Please keep these e-mails available as they contain important access information that you will need going forward.
- For help with usernames, passwords, missing e-mails, and technical difficulties, please contact NCQA at 1-888-275-7585.

Please follow these instructions carefully as you begin this process:

1. Information technology (IT) requirements to complete the PCMH recognition process:

- a. You will need a computer with:
 - i. Access to the Internet
 - ii. Microsoft Word
 - iii. Microsoft Excel
 - iv. Adobe Acrobat Reader (available for free online)
- b. This computer should also have access to the practice's clinical and administrative systems
- c. Please note that the survey system should be accessed and the survey completed using Internet Explorer. Other internet programs may not be compatible (i.e. Firefox, Safari).

2. Your organization's key staff members

- a. The organization's party responsible for the PCMH submission should assess the resources required prior to making work assignments.
- b. NCQA needs a Primary Contact designated in the online application to receive communications. The organization may grant access to other staff member to the online application and ISS survey tool.
- c. Your practice should designate one or more staff members to complete all necessary application information and the ISS survey tool.

3. Support from a sponsor, state, or organization

- a. If you have a sponsor, determine if you or the sponsor will be paying the PCMH submission fees.
- b. If your sponsor is officially engaged with NCQA, you may be eligible for a 20% discounts on single site PCMH submissions.

- c. Confirm your sponsor's timeline. NCQA requires up to 60 days for decisions once you have submitted your ISS survey tool. Allow yourself plenty of time; the PCMH submission process is complex.
- d. Determine your sponsor's contact information, and what help they may offer to you.
- e. NCQA does not provide information on incentive programs or financial rewards offered by sponsors.

4. PCMH training and self assessment

- a. NCQA provides two types of free PCMH training: PCMH Standards and Guidelines, and the ISS survey tool.
- b. We strongly encourage all practices to attend both types of training. Each training session is about 2 hours long. You may choose to attend more than once. You'll find the training schedule and instructions at www.ncqa.org/rptraining.aspx.
- c. Training will help you understand how to name your practice at the time you order your online application and ISS survey tool.
- d. At this point, order your online application (free) and ISS survey tool. Watch for those response e-mails from NCQA and safeguard them.
- e. Self assess. Use the Standards and Guidelines to determine your total score. Pay special attention to the Must Pass Elements.
- f. Understand the scoring. Refer to the Standards and Guidelines to determine the Level of Recognition you will earn based on your self assessment.

5. Initializing your PCMH ISS survey tool

- a. Please refer to the e-mails you received from NCQA when you ordered your ISS survey tool.
- b. Follow the instructions in the e-mail to access your ISS survey tool.
- c. Information on the license number for your survey can be found on the first welcome screen after logging into the online survey tool. Note your license number.
- d. Select your three important clinical conditions.
- e. Enter your three important clinical conditions in the tool.
- f. Save your entries.
- g. You will return to complete your ISS survey tool at a later date.

6. The Online Application

- a. Please refer to the e-mails you received from NCQA when you ordered on your online application.
- b. Launch your online application following the instructions in the e-mail.
- c. If fees are being paid for by a Sponsor, you can ignore the fee instructions. Information on Sponsor must be entered for each site to use the discounted application fee schedule. The fee schedule is posted on the Web site and available in the resources for the application system.
- d. Add your clinicians and your application to your practice site. Enter your ISS survey tool license number into the application. By entering your license number you will link your ISS tool and your online application. This will cause your three clinical important conditions to auto populate in the online application.
- e. You must sign the Business Associate Agreement (BAA) and PCMH Agreement. You may also choose to sign the Attestation. We encourage you to do so electronically through the online application. If you need to make custom changes to the two Agreements download the Manual Signature versions on each of the Agreements starting page. Red line any changes you would like made to the Agreement and submit to NCQA at the address below. Please note you will not be able to submit your application until any customized Agreements are accepted, signed, and uploaded by NCQA.

NCQA Attn: PCMH Program
1100 13th Street NW
Suite 1000
Washington, DC 20005

- f. If your practice is a multi-location practice (3 or more sites) that would like to complete the medical home assessment for the multiple locations, follow the special set of instructions in the application system.
- g. The online application must be received prior to submitting the ISS survey tool. You will receive an e-mail from NCQA confirming the receipt of your online application and an additional e-mail to inform you that NCQA is ready to receive your ISS survey tool.

7. Preparing your PCMH ISS survey for submission

- a. Your PCMH program fee is due when you submit your ISS tool. Use the fee schedule in effect as of the date of submission. Fees are available on NCQA's website. Send your fee to Recognition Programs, NCQA, 1100 13th St. NW, Washington DC 20002. If you would like to pay by credit card, request a form by e-mailing pcmh@ncqa.org.
- b. Refer once again to NCQA's e-mail containing the link to your ISS survey tool and log in.
- c. The *Help & Instructions* at the top right corner of the screen are always available within the tool.
- d. Through the training sessions and by reading the resource materials, you know how to respond to Elements and attach documentation to the ISS library.
- e. Upload your saved documents to the document library. Verify the location of your files.
- f. Perform the completeness check available in the "Submit Survey Tool" menu. Verify that your documents have been uploaded.
- g. Self assess again. Note your total points and the Must Pass Elements.
- h. If you are satisfied with your self assessment, submit your ISS survey.
- i. You will receive an error message if:
 - i. you did not have your application processed
 - ii. You did not upload any documents
- j. After you have submitted your online survey, you will receive e-mail confirmation from NCQA.
- k. You will receive an e-mail within 60 days informing you of NCQA's decision.