Key Steps in Transforming Your Practice to Become a Patient Centered Medical Home – the Role of Leaders in This Effort

1. Understanding the PCMH Framework: its history, principles, key components and the certification/recognition/accreditation process.
   - Patients are central to this model-this is the foundation.
   - The PCMH framework promotes formalizing care processes and formalizing systems.
   - Essential components of the PCMH model such as providing comprehensive primary and supportive care; working with a CAB; and accountability for quality reporting are all components of Ryan White (RW) programs and are foundational characteristics to the PCMH.
   - Challenges for RW programs: using technology and documentation to convert informal processes into formal systems. Although RW programs are oriented to the patient-centered approach, systems are not always optimal and technology and administrative processes may not be in place to support the care team in ways that ensure coordinated and timely care. The quality improvement process and reporting may also not include communicating with all members of the care team, your Board and your patients.

2. Communicating to Boards, patients and staff
   - Senior leaders (CEO/ED/CMO/Medical Director/COO) need to be the first to articulate project goals.
   - It is important to communicate how obtaining PCMH certification/recognition fits in with your organization’s overall strategic vision to key stakeholders (Boards, patients and the care team). Does your mission and vision emphasize patient centered care and other components of this model?
   - This activity helps to build support, gain organizational commitment and buy-in. If your mission and vision do not include explicit language about becoming a PCMH you will need to work with your Board, clinic leaders and staff and consider including in your next internal strategic planning meeting. We have asked you to conduct a SWOT analysis and an action plan. Consider these actions when completing your SWOT and action plans.
   - It is important to develop presentations targeted to both staff and Board members. These presentations should include basic information about the PCMH model and the certification/recognition/accreditation process; provide specific details to staff about why obtaining the certification is important, what it will take, roles and responsibilities, and how specific jobs will be affected. For Board members they will want to know more about benefits of the certification/recognition/accreditation process to reimbursement, justification for investing so much time and energy into this effort, and gain support for resources needed (selecting the project lead, and key staff members, discuss the need for protecting time of these individuals, consider external consultation, and technology needs).

3. Deciding what you want to accomplish and setting goals
   - Assessing where you are and your intentions related to seeking certification/recognition/accreditation. Place this process within a broader framework of working toward a true PCMH. This process will help build momentum to keep moving the transformation process forward.
   - Organizations need to decide whether they will seek recognition/certification from (Joint Commission, NCQA, Accreditation Association of Ambulatory Health Care, others)
   - Understand the requirements of the certification/recognition/accreditation you are seeking
After this has been determined effort needs to be centered on understanding the very specific requirements of these certification/recognition/accreditation activities so that a concrete and realistic action plan (with responsible persons, activities and timelines) can be developed. For example, for NCQA, you will want to decide which recognition level you will obtain and the Joint Commission requires that all clinics (if in a multi-site organization) obtain certification together.

Both NCQA and the Joint Commission also offer specific training on their requirements which is worth considering.

Reviewing your policies and procedures, and writing and implementing new ones where needed is also among the first activities necessary for the project team. Organizational leaders also need to be engaged in this activity for successful implementation to occur.

4. Identifying your project team, assessing your internal resources and developing your action plan and timeline

- Identifying the right members for your PCMH project team will be the key to your success.
- Are you the “lead leaders” or the operational team who will do the transformation work? The highest ranking members of the organization should select and recruit team members. Ask yourselves if you are the right team and whether you have the right people working on this effort?
- It is important to carefully choose your team and provide a specific charter from leadership (including a clearly articulated goal, support and identified timeframe). This team needs to be appropriately resourced, prioritized and paid attention to throughout the process.
- Specific activities include identifying appropriate team size and members, if you are multiple sites you will want to include members from each site who are familiar with the culture and operations of multiple sites in your organization.
- Project goals and scope will determine number and types of team members needed.
- Think about a successful QI effort and the team members and approach that helped make this a success.
- Tips: personally recruit each project team member and meet with them face-to-face to discuss goals, specific terms and expectations.
  - Decide whether one team or multiple small teams will be used. If multiple teams select a strong overall project lead.
  - You may want to consider team building activities associated with this project. You may also need to conduct leadership training or seek this out for your organization. Strong, thoughtful and engaged leaders who are also good communicators will ensure success.
  - To assess your internal resources and capacity for this work refer to your SWOT analysis
  - One activity that can be very helpful is to conduct the baseline PCMH self-assessment. NCQA has one and there are many others available.
  - Assess your technology as it is also beneficial to this work. Relevant technology includes: a practice management system that facilitates day to day scheduling and billing, e-prescribing that allows electronic submissions directly to pharmacies, a registry that collects clinical data on patients, tracks test and facilitates care planning and population health, and EMR and health information exchange which is typically built in to many of the EMR systems today.

Adapted from: