
NCQA PCMH 2014 Documentation Checklist

PCMH 3D MUST PASS

PCMH 3D Factor 1

Must Pass

Critical Factor

Corporate Survey

At least annually the practice proactively identifies populations of patients and reminds them, or their families/caregivers, of needed care based on patient information, clinical data, health assessments and evidence-based guidelines including:

At least two different preventive care services

1. _____
2. _____

PCMH 3D Factor 2

Must Pass

Critical Factor

Corporate Survey

At least annually the practice proactively identifies populations of patients and reminds them, or their families/caregivers, of needed care based on patient information, clinical data, health assessments and evidence-based guidelines including:

At least two different immunizations

1. _____
2. _____

PCMH 3D Factor 3

Must Pass

Critical Factor

Corporate Survey

At least annually the practice proactively identifies populations of patients and reminds them, or their families/caregivers, of needed care based on patient information, clinical data, health assessments and evidence-based guidelines including:

At least three different chronic or acute care services

1. _____
2. _____
3. _____

PCMH 3D Factor 4

Must Pass

Critical Factor

Corporate Survey

At least annually the practice proactively identifies populations of patients and reminds them, or their families/caregivers, of needed care based on patient information, clinical data, health assessments and evidence-based guidelines including:

Patients not recently seen by the practice

PCMH 3D Factor 5

Must Pass

Critical Factor

Corporate Survey

At least annually the practice proactively identifies populations of patients and reminds them, or their families/caregivers, of needed care based on patient information, clinical data, health assessments and evidence-based guidelines including:

Medication monitoring or alert

Documentation Required

Report

Materials

Screen Shots, i.e., electronic “copy” may be used as 1) examples (system capabilities of an electronic health record—EHR) 2) materials (Web site resources) 3) reports (logs, patient lists) or 4) records (e.g. documentation of clinical advice in the medical record

Report

Aggregated data showing evidence

Stage 2 Core Meaningful Use Requirement*

Does the Report include the following?

Practice Name

De-identified PHI

Reporting period current, within the past 12 months

Correct time frame (previous 12 months)

Report is not future dated

Displays numerator, denominator, and percent

Text boxes, arrows, or other methods identify important headers/sections

Text boxes, arrows, or other methods briefly explain the importance to the elements

Materials

Information for patients or clinicians (e.g. clinical guidelines, self-management and educational resources)

Do the Materials include the following?

Practice Name

Visible URL, if submitting a screen shot from a website

De-identified PHI

Current, within the past 12 months

Text boxes, arrows, or other methods identify important sections

Text boxes, arrows, or other methods briefly explain the importance to the elements

Does this documentation meet the intent of the factor?

Yes No If no, suggestions to meet the intent