

Patient-Centered Medical Home Checklist

Build your medical home with a strong foundation in family medicine. Apply this checklist to your practice.

QUALITY CARE

Do you and your staff foster a culture of improvement?

- ☐ Incorporate quality improvement into daily work
- ☐ Establish core performance measures
- ☐ Collect and analyze data for better clinical management and efficiencies
- ☐ Discuss best practices and ways to improve

Do you utilize risk-stratified care management principles to manage your patient population?

- ☐ Utilize a methodology to identify each patient's risk status
- ☐ Develop and update personalized care plans
- ☐ Include planned-care visits for chronic conditions and preventive services
- ☐ Provide intensive care management for high-risk patients
- ☐ Use tools to track patient populations by risk category

Do you incorporate patient safety into your clinic practice?

- ☐ Assess patient safety in your office
- ☐ Reconcile patient medications at each visit and post-hospitalization
- ☐ Have processes in place to report and address errors

Do you coordinate care across the medical neighborhood?

- ☐ Create an informed care team to oversee continuity of care
- ☐ Manage care transitions and build linkages to community-based resources
- ☐ Coordinate and monitor exchanges of information with specialists and care facilities
- ☐ Evaluate a care transition process

Do you incorporate quality assurance into on-site laboratory testing?

- ☐ Possess a current CLIA '88 license for the appropriate level of testing performed
- ☐ Register with COLA or other approved accreditation agency
- ☐ Participate in an approved proficiency testing program, e.g. AAFP-PT
- ☐ Conduct competency assessment for staff performing laboratory testing
- ☐ Follow the guidelines for Good Laboratory Practice provided by the Centers for Disease Control and Prevention

PATIENT-CENTERED CARE

Do you have processes to ensure patients' access to care?

- ☐ Same-day appointments
- ☐ Extended hours for access to care
- ☐ Physician access to the medical chart 24/7 to inform care decisions
- ☐ Ability for patients to select their own physician
- ☐ Utilization of secure email for communication with patients
- ☐ Web portal for patients to request Rx refills, schedule appointments, etc.
- ☐ Procedures to accommodate patients' barriers to care (including transportation, physical, and cognitive barriers)
- ☐ Linguistically and culturally appropriate services

Do you engage patients in shared decision-making?

- ☐ Discuss treatment options in an unbiased way
- ☐ Consider patients' health goals and priorities
- ☐ Provide patients with condition-specific decision aids
- ☐ Have decision-making discussions with patients after they have reviewed decision aids
- ☐ Record patient preferences and ensure follow through on decisions

Does your practice support patient self-management?

- ☐ Assess patient and caregiver self-management abilities
- ☐ Utilize motivational interviewing to coach patients
- ☐ Consider home monitoring of patients' chronic conditions
- ☐ Engage family and caregivers in care plan
- ☐ Offer health coach support

Do you assess and improve your patients' experience of care?

- ☐ Conduct patient satisfaction surveys on a regular basis
- ☐ Establish a patient advisory panel to guide practice and quality improvement activities
- ☐ Conduct patient focus groups when needed



HEALTH INFORMATION TECHNOLOGY

Do you have a sound technology infrastructure in place?

- ☐ Secure user access, patient consent, and data breach protocols
- ☐ Compatibility with multiple device types (desktop, laptop, tablet, smartphone, etc.)
- ☐ Proven processes for system updates and full data recovery

Is your practice digitally connected to the medical neighborhood?

- ☐ Health information exchanges
- ☐ Secure messaging with patients and health professionals
- ☐ Electronic medication and diagnostic ordering/management
- ☐ Consult/referral management and follow-up communications

Have you considered these attributes in your EHR system?

- ☐ Population health management through patient registries
- ☐ Proactive health management of each patient
- ☐ Pre-built and customized reports for quality measures

Do you utilize evidence-based clinical decision support tools?

- ☐ Point-of-care answers to clinical questions
- ☐ Evidence-based data collection, documentation, and order sets
- ☐ Clinical terminology and coding tools (ICD, CPT, SNOMED)
- ☐ Pre-built and customized point-of-care alerts and reminders

PRACTICE ORGANIZATION

Do you have a disciplined financial management approach?

- ☐ Budget and forecast for the future, utilizing cost-benefit analysis
- ☐ Manage cash flow and seek revenue-enhancing opportunities for your practice
- ☐ Optimize coding and billing procedures
- ☐ Contract and negotiate with payers from an informed position

Do you embrace a culture of change in your medical practice?

- ☐ Establish a PCMH leadership team to plan the transformation process
- ☐ Develop a timeline for PCMH implementation and monitor progress
- ☐ Engage all team members in a shared vision

- ☐ Value each team member by involving them in the change management process
- ☐ Provide staff education and training opportunities to support patient-centered care

Do you have a staffing model and practice environment that supports a PCMH?

- ☐ Personal physician that leads the team to coordinate efficient patient care
- ☐ Utilize team-based care to meet your patients' overall health care needs
- ☐ Defined roles for team members that encourage staff to perform at the highest level
- ☐ Flexible staffing schedules and cross-trained staff members to improve access
- ☐ Health coach and care coordination functions
- ☐ Patient-friendly environment that accommodates special needs