



Change Concepts That Must be Achieved by Phase

<i>Change Concept</i>	<i>Base Milestone (from PAT)</i>	<i>Primary Care Milestone # Score</i>	<i>Specialty Care Milestone # Score</i>
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Phase 1 - Set Aims

Primary Care – 1 Milestones Specialty Care – 1 Milestones

2.1 Engaged and Committed Leadership			
2.1.2 Develop a roadmap	Practice has developed a vision and plan for transformation that includes specific clinical outcomes and utilization aims that are aligned with national TCPI aims and that are shared broadly within the practice.	Primary Care Milestone: 18 Score: 3	Specialty Care Milestone: 13 Score = 3

Phase 2 - Use Data to Drive Care

Primary Care – 12 Milestones Specialty Care – 10 Milestones

No Affiliated Change Concept			
None	Practice has met its targets and has sustained improvements in practice-identified metrics for at least one year.	Primary Care Milestone: 1 Score = 1	Specialty Care Milestone: 1 Score = 1
None	Practice identifies the primary care provider or care team of each patient seen and (where there is a primary care provider) communicates to the team about each visit/encounter.	None	Specialty Care Milestone: 10 Score = 2
1.1 Patient and Family Engagement			
1.1.3 Collaborate with patients and families	Practice can demonstrate that it encourages patients and families to collaborate in goal setting, decision making and self-management.	Primary Care Milestone: 4 Score = 1	Specialty Care Milestone: 4 Score = 1
1.3 Population Management			

1.3.1 Assign to panels	Practice uses a consistent approach to assign patients to a provider panel and confirms assignments with providers and patients. Practice reviews and updates panel assignments on a regular basis.	Primary Care Milestone: 8 Score = 3	None
1.3.3 Stratify risk	Practice has a reliable process in place for identifying risk level of each patient and providing care appropriate to the level of risk. Primary: This (may) includes developing a health condition not already present, exacerbation of a condition or complications, need for a higher intensity of care, including hospitalization. Specialty: Risk identification may be done within the specialty practice or may be obtained from the patient's primary care provider. Practice ensures that patients assessed to be at highest risk receive care management support or have a care plan in place that the practice is following.	Primary Care Milestone: 9 Score = 1	Specialty Care Milestone: 7 Score = 1
1.3.3 Stratify risk	The practice provides care management for patients at highest risk of hospitalizations and/or complications and has a standard approach to documentation.	Primary Care Milestone: 10 Score = 2	None
1.4 Practice as a Community Partner			
1.4.4 Practice as a Community Partner	Practice facilitates referrals to appropriate community resources, including community organizations and agencies as well as direct care providers.	Primary Care Milestone: 11 Score = 2	Specialty Care Milestone: 8 Score = 2
1.5 Coordinated Care Delivery			
1.5.1 Manage care transitions	Practice follows up via phone, visit, or electronic means with patients within a designated time interval (24 hours/ 48 hours/ 72 hours/ 7 days) after an emergency room visit or hospital discharge.	Primary Care Milestone: 13 Score = 2	None

1.6 Organized Evidence-based Care			
1.6.1 Consider the whole person	Practice ensures that care addresses the whole person, including mental and physical health.	Primary Care Milestone: 15 Score = 2	None
2.2 Culture of Quality and Safety			
2.2.1 Use an organized QI approach	Practice uses an organized approach (e.g. use of PDSAs, Model for Improvement, Lean, FMEA, Six Sigma) to identify and act on improvement opportunities.	Primary Care Milestone: 19 Score = 2	Specialty Care Milestone: 14 Score = 2
2.2.2 Build QI capability 2.2.3 Empower staff	Practice builds QI capability in the practice and empowers staff to innovate and improve.	Primary Care Milestone: 20 Score = 2	Specialty Care Milestone: 15 Score = 2
2.3 Transparent Measurement and Monitoring			
2.3.1 Use data transparently	Practice regularly produces and shares reports on performance at both the organization and provider/care team level, including progress over time and how performance compares to goals. Practice has a system in place to assure follow up action where appropriate.	Primary Care Milestone: 21 Score = 3	Specialty Care Milestone: 16 Score = 3
3.1 Strategic Use of Practice Revenue			
3.1.1 Strategic use of practice revenue	Practice uses sound business practices, including budget management, and return on investment calculations.	None	Specialty Care Milestone: 18 Score = 3
3.2 Workforce Vitality and Joy in Work			
3.2.3 Cultivate joy	Practice has effective strategies in place to cultivate joy in work and can document results.	Primary Care Milestone: 24 Score = 1	Specialty Care Milestone: 19 Score = 1

Phase 3 - Achieve Progress on Aims

Primary Care – 13 Milestones Specialty Care – 10 Milestones

No Affiliated Change Concept			
None	Practice has met its targets and has sustained improvements in practice-identified metrics for at least one year.	Primary Care Milestone: 1 Score = 2	Specialty Care Milestone: 1 Score = 2
None	Practice identifies the primary care provider or care team of each patient seen and (where there is a primary care	None	Specialty Care Milestone: 10 Score = 3

	provider) communicates to the team about each visit/encounter.		
1.1 Patient and Family Engagement			
1.1.2 Listen to patient and family voice	Practice has a formal approach to obtaining patient and family feedback and incorporating this into the QI system, as well as the strategic and operational decisions made by the practice.	Primary Care Milestone: 5 Score = 2	Specialty Care Milestone: 5 Score = 2
1.2 Team-based Relationships			
1.2.2 Clarify team roles	Practice sets clear expectations for each team member's functions and responsibilities to optimize efficiency, outcomes and accountability.	Primary Care Milestone: 6 Score = 3	Specialty Care Milestone: 6 Score = 3
1.2.3 Optimize continuity	Practice has a process in place to measure and promote continuity between a patient and his/her care team so that patients and care teams recognize each other as partners in care.	Primary Care Milestone: 7 Score = 3	None
1.5 Coordinated Care Delivery			
1.5.2 Establish medical neighborhood roles	Primary: Practice has defined its medical neighborhood and has formal agreements in place with these partners to define roles and expectations. Specialty: Practice works with the primary care practices in its medical neighborhood to develop criteria for referrals for episodic care, co-management, and transfer of care/ return to primary care, processes for care transition, including communication with patients and family.	Primary Care Milestone: 12 Score = 2	Specialty Care Milestone: 9 Score = 2
1.5.1 Manage care transitions	Practice follows up via phone, visit, or electronic means with patients within a designated time interval (24 hours/ 48 hours/ 72 hours/ 7 days) after an emergency room visit or hospital discharge.	Primary Care Milestone: 13 Score = 3	None
1.5.3 Coordinate care	Practice clearly defines care coordination roles and responsibilities and these have been fully implemented within the practice.	Primary Care Milestone: 14 Score = 2	None

1.6 Organized Evidence-based Care			
1.6.4 Decrease care gaps	Practice uses population reports or registries to identify care gaps and acts to reduce them.	Primary Care Milestone: 16 Score = 2	None
1.6.3 Implement evidence-based protocols	Practice uses evidence-based protocols or care maps where appropriate to improve patient care and safety.	None	Specialty Care Milestone: 11 Score = 2
1.7 Enhanced Access			
1.7.1 Provide 24/7 access	Practice has a system in place for patients to speak with their care team 24/7.	Primary Care Milestone: 17 Score = 3	Specialty Care Milestone: 12 Score = 3
2.2 Culture of Quality and Safety			
2.2.2 Build QI capability 2.2.3 Empower staff	Practice builds QI capability in the practice and empowers staff to innovate and improve.	Primary Care Milestone: 20 Score = 3	Specialty Care Milestone: 15 Score = 3
3.1 Strategic Use of Practice Revenue			
3.1.1 Use sound business practice	Practice uses sound business practices, including budget management and return on investment calculations.	Primary Care Milestone: 23 Score = 3	None
3.3 Capability to Analyze and Document Value			
3.3.4 Document value	Practice considers itself ready for migrating into an alternative based payment arrangement	Primary Care Milestone: 26 Score = 2	Specialty Care Milestone: 21 Score = 2
3.4 Efficiency of Operation			
3.4.1 Streamline work	Practice uses a formal approach to understanding its work processes, eliminating waste in the processes, and increasing the value of all processing steps.	Primary Care Milestone: 27 Score = 2	Specialty Care Milestone: 22 Score = 2

Phase 4 - Achieve Benchmark Status

Primary Care – 16 Milestones Specialty Care – 13 Milestones

No Affiliated Change Concept			
None	Practice has met its targets and has sustained improvements in practice-identified metrics for at least one year.	Primary Care Milestone: 1 Score = 3	Specialty Care Milestone: 1 Score = 3
None	Practice has reduced unnecessary hospitalizations.	Primary Care Milestone: 3 Score = 3	Specialty Care Milestone: 3 Score = 3

1.6 Organized Evidence-based Care			
1.6.5 Reduce unnecessary tests	Practice has reduced unnecessary tests, as defined by the practice.	Primary Care Milestone: 2 Score = 3	Specialty Care Milestone: 2 Score = 3
1.1 Patient and Family Engagement			
1.1.3 Collaborate with patients and families	Practice can demonstrate that it encourages patients and families to collaborate in goal setting, decision making, and self-management.	Primary Care Milestone: 4 Score = 3	Specialty Care Milestone: 4 Score = 3
1.1.2 Listen to patient and family voice	Practice has a formal approach to obtaining patient and family feedback and incorporating this into the QI system, as well as the strategic and operational decisions made by the practice.	Primary Care Milestone: 5 Score = 3	Specialty Care Milestone: 5 Score = 3
1.3 Population Management			
1.3.3 Stratify risk	Practice has a reliable process in place for identifying risk level of each patient and providing care appropriate to the level of risk. Primary: This (may) includes developing a health condition not already present, exacerbation of a condition or complications, need for a higher intensity of care, including hospitalization. Specialty: Risk identification may be done within the specialty practice or may be obtained from the patient's primary care provider. Practice ensures that patients assessed to be at highest risk receive care management support of have a care plan in place that the practice is following.	Primary Care Milestone: 9 Score = 3	Specialty Care Milestone: 7 Score = 3
1.3.3 Stratify risk	The practice provides care management for patients at highest risk of hospitalizations and/or complications and has a standard approach to documentation.	Primary Care Milestone: 10 Score = 3	None
1.4 Practice as a Community Partner			
1.4.4 Use	Practice facilitates referrals to appropriate community	Primary Care Milestone: 11	Specialty Care Milestone: 8

community resources	resources, including community organizations and agencies as well as direct care providers.	Score = 3	Score = 3
1.5 Coordinated Care Delivery			
1.5.2 Establish medical neighborhood roles	<p>Primary: Practice has defined its medical neighborhood and has formal agreements in place with these partners to define roles and expectations.</p> <p>Specialty: Practice works with the primary care practices in its medical neighborhood to develop criteria for referrals for episodic care, co-management, and transfer of care/ return to primary care, processes for care transition, including communication with patients and family.</p>	Primary Care Milestone: 12 Score = 3	Specialty Care Milestone: 9 Score = 3
1.5.3 Coordinate care	Practice clearly defines care coordination roles and responsibilities and these have been fully implemented within the practice.	Primary Care Milestone: 14 Score = 3	None
1.6 Organized Evidence-based Care			
1.6.1 Consider the whole person	Practice ensures that care addresses the whole person, including mental and physical health.	Primary Care Milestone: 15 Score = 3	None
1.6.3 Implement evidence-based protocols	Practice uses evidence-based protocols or care maps where appropriate to improve patient care and safety.	None	Specialty Care Milestone: 11 Score = 3
1.6.4 Decrease care gaps	Practice uses population reports or registries to identify care gaps and acts to reduce them.	Primary Care Milestone: 16 Score = 3	None
2.2 Culture of Quality and Safety			
2.2.1 Use an organized QI approach	Practice uses an organized approach (e.g. use of PDSAs, Model for Improvement, Lean, FMEA, Six Sigma) to identify and act on improvement opportunities.	Primary Care Milestone: 19 Score = 3	Specialty Care Milestone: 14 Score = 3
2.4 Optimal Use of HIT			
2.4.1 Innovate for access	Practice uses technology to offer scheduling and communication options that improve patient access by including alternative visit types and electronic communication approaches.	Primary Care Milestone: 22 Score = 3	Specialty Care Milestone: 17 Score = 3

3.2 Workforce Vitality and Joy in Work			
3.2.3 Cultivate Joy	Practice has effective strategies in place to cultivate joy in work and can document results.	Primary Care Milestone: 24 Score = 3	Specialty Care Milestone: 19 Score = 3
3.4 Efficiency of Operation			
3.4.1 Streamline work	Practice uses a formal approach to understanding its work processes, eliminating waste in the processes, and increasing the value of all processing steps.	Primary Care Milestone: 27 Score = 3	Specialty Care Milestone: 22 Score = 3

Phase 5 - Thrive as a Business via Pay for Value Approaches

Primary Care – 2 Milestones Specialty Care – 2 Milestones

3.3 Capability to Analyze and Document Value			
3.3.3 Develop financial acumen	Practice shares financial data in a transparent manner within the practice and has developed the business capabilities to use business practices and tools to analyze and document the value the organization brings to various types of alternative payment models.	Primary Care Milestone: 25 Score = 3	Specialty Care Milestone: 20 Score = 3
3.3.4 Document value	Practice considers itself ready for migrating into an alternative based payment arrangement.	Primary Care Milestone: 26 Score = 3	Specialty Care Milestone: 21 Score = 3