PCMH Supplemental Interim Reports Technical Assistance Call

Moderator: Mark Yanick
March 28, 2012
2:00 pm CT

Coordinator: Welcome, and thank you for standing by.

At this time all participants' lines will be on a listen-only mode. During the question and answer session please press star and 1 on your touchtone telephone. You will be prompted to record your name slowly and clearly so that you may be announced.

Today's conference is being recorded. If you have any objections, you many disconnect at this time.

Now I'd like to turn the call over to Mark Yanick. Sir, you may begin.

Mark Yanick: Thank you very much. Good afternoon everyone, and thank you for joining today's call. My name is Mark Yanick, and I am with the Bureau of Primary Health Care's Office of Training and Technical Assistance Coordination. And we are hosting today's grantee TA call on completing the PCMH supplemental interim reports.

In today's session, you will learn about what documentation you will need to submit to meet the reporting requirements. There will be a Q&A session as well, and I want to also make sure that folks who are on the call, if you have not received the announcement, you can get the slide presentation and other materials for today's session at http://www.hrsa.gov/grants/apply/assistance/pcmh.

And at this time, I would like to turn the session over to Nina Brown from the Office of Quality and Data.

Nina Brown: Alright. Thank you, Mark. So, as Mark mentioned, we are all here for the technical assistance call on how to complete the interim report for the PCMH supplemental funding. In the room with me I have my colleague Michelle Bright from OAM, and she will be going over the systems piece of how to submit your reports and the logistics.

So, thank you all so much for joining us today. I hope everybody has recuperated and made it back from (NACHC) energized and ready to continue the great work that you do. I had the opportunity to speak with a lot of you at the (NACHC) meeting and hear about all of your exciting projects around PCMH and HIT meaningful use. And so it was just really great to have the opportunity to meet you in person.

All right, so Slide number 2, the learning objectives for today's call, as Mark mentioned, is to understand the process for interim reporting, understand and identify the key activities and deliverables to report, and lastly, understand the key requirements associated with the funding opportunity.

So Slide 3, the patient-centered medical home - just as a brief refresher, I'm sure you're all well-versed by now, but the patient-centered medical home has been approached to providing comprehensive patient-centered and coordinated primary care for our health center population.

It is an agency priority goal for HRSA, which is - for those of you at (NACHC) that heard Mary Wakefield addressing the health centers at the session - you know that this is an agency priority and by the end of fiscal year 2013, 25% of our health centers - the goal is to have 25% of our health centers recognized as patient-centered medical homes.

We do have an internal goal for the bureau that by the end of calendar year 2012, 13% of our health centers will have become recognized as patient-centered medical homes.

And HRSA has made a number of investments in the patient-centered medical home transformation through the NCQA PCMH health home initiative, the accreditation initiative through The Joint Commission and AAAHC, both of which have a patient-centered medical home option, and then the supplemental funds, which is actually why you are on the call today.

So Slide 4, this again is just an overview of the supplemental funding and really the purpose was to improve the quality of care and access to services for health centers by supporting the costs associated with enhancing quality improvement systems and becoming PCMHs.

It was a one-time supplement of $35,000 with a one-year project period. And the key requirement for receiving the funding was the submission of a notice of intent, which we will go into in a few slides, and then completing the interim report and the final report. And, as most you are probably aware, the interim report was released through EHB on March 18.

We realize that $35,000 in the grand scheme of a health center's operating budget is quite small, so these funds are really to help jumpstart your PCMH transformation process and get you moving towards patient-centered medical home recognition.

So Slide 5, the goal of the supplemental funding opportunity. Through this opportunity we wanted the health centers to - we wanted you guys to assess your operations through the PCMH lens, heighten your awareness of the benefits of PCMH recognition, as I mentioned earlier, to submit a notice of intent, or NOI, to a PCMH initiative.

As we stated on the original call back in August or July, now - it seems so far away - this can be an NOI submitted to a federal initiative, so NCQA accreditation. It can be a state-based initiative or local private payer initiative.

Also, to adopt the PCMH model with an up-front investment in quality-related activities, and for those centers that have already achieved PCMH recognition - and we have about 8% of our grantees that are already recognized as medical homes - it's to help you enhance or maintain your current PCMH practice.

So moving on to Slide 6, this is just a bit of data from the applications that the 904 health centers submitted to receive funding. And you'll notice that these don't add up to a perfect 100% because, as you're all aware, you could pick more than one domain in which you chose to focus your activity. But we just kind of wanted to give you an idea of the areas that you and your colleagues - so that you would work on and focus your PCMH activities.

So as you can see, the top three are in the areas of planning and managing care, enhancing access and continuity, and then tracking and coordinating care. However, it was a pretty close spread across all six.

So, moving on to Slide 7 - and I should have mentioned this at the beginning of the call - but it's a very brief presentation and there will be lots of time for you all to ask questions. So back to Slide 7, the interim report format in EHB, as most of you have seen already probably, the interim report format is following the application form, so it's that Excel document.

There is some important points that we want you to know and you will see in the Important Information section on the document. This Excel document - but your interim report cannot be completed on an Apple or Mac computer. You must use a Microsoft Windows-based computer for this.

There is coding built into the spreadsheet to allow us to easily query the data. And it's not a fun transition between Mac and PC. So it actually corrupts the file and I know about 180 of you had the pleasure of me and your project officer hunting you down over Labor Day weekend trying to get you to resend your files in. So we identified the issue. Please complete the interim report on a PC.

Also, please upload that Excel form in the HRSA Electronic Handbook as your PCMH project report. And then there is just brief instructions in terms of how to fill out the numbers in which boxes. So essentially, this is going to be a very brief report on the activities you've completed since you received the funding September 19.

Whatever domain you propose to focus your activities on, and I know that this varies for - amongst the grants - the health centers and everybody kind of proposed something different. Some grantees said we're only going to focus on 1B and we're going to put all of our money to that. Other grantees said we're going hire a consultant and it's going to address all six domains.

So in the cell that corresponds to the domain and sub-domain that you chose to focus on in your original application, you are just going to write a brief narrative about what you have accomplished in the past 6 months.

And actually let me move to Slide 8 to talk about what we actually want you to report on in your report. So update the fields that correspond to your organization's original application.

I will note, if you fall into that group of health centers who said that you were going to focus on all six domains, there's no need for you to copy and paste the same thing in every field. Just highlight - put it in one field, 1A, that's fine and highlight, you know, our original application covered all six domains. So this is our update. It applies to all six.

And the report should include updates on the following three pieces of information. So what is the current status of your proposed project and if you've made any revisions. We have had some health centers, who after about a month or two realized this project isn't really feasible, or now that we understand more about this PCMH thing, we want to move in a different direction.

And it's absolutely fine for you to change your proposed projects. You just need to make sure to update that information with your project officer. And I will get into that in a couple more slides.

But - so provide the current status of your proposed project and note any revisions that you have made from your original application. Highlight key milestones and deliverables that have been achieved in the completion of your project. And please comment on the status of your NOI submission and the selected third party or recognition body that you have submitted your NOI to or that you will be submitting your NOI to.

And the project officers, we've talked with them as well, so they're going to be looking for these three things. If any of this information is missing, they will send it back to you and ask you to update it and revise it.

If you have modified your project, please ensure that you submit a revised project narrative, work plan, and budget if applicable to your project officer. So if you originally proposed to hire a consultant and you decide we don't really want to do that anymore, we want to buy this additional module for our EHR, you would need to submit a revised budget through the prior approval request module because it would go from consultant fees to equipment fees.

So your project officer will also be looking and making sure that they have that information on file as well.

Okay. And in terms of the timeline for completion of projects, as you all know, these were released March 18, they're due April 30 in EHB. You will get a reminder from EHB around April 16 if you have not yet submitted your report.

Okay, so, some reporting tips, and Michelle will go into this further, but the submission will follow the normal reporting procedures. Ensure that the Excel document isn't corrupt. So you must complete the form emailed through EHB.

As I mentioned earlier, they cannot be completed on a Mac. And if you want to test it out beforehand and make sure that it's not corrupt, you can send it to someone else and have them open it. If you're seeing Wingdings instead of Arial, that would be a sign of corruption, so you may want to change it before you submit it.

Again, ensure your project officer has all revised narratives and budgets if you've changed your project. In addition, it's also highly recommended that you submit your NOIs early, so don't wait until September 1, 2012. And remember that it can be submitted to HRSA or other federal PCMH initiatives, state-based initiatives, or private payer initiatives.

And for the federal initiatives, we are asking that you submit a final survey for recognition within a year of your NOI getting sent to that third party recognition body. Okay?

So now I just wanted to highlight some frequently asked questions that we have received from the grantees over the past two or three weeks. So one of them is, "Can I have a no-cost extension?" Unfortunately, the answer is no.

This was supplemental funding and all of your projects must be completed within the grant period.

Another common question is, “Do I have to become a patient-centered medical home by the end of this grant period?” No. The only requirement for this grant period is that you have submitted that NOI to get the process. You do not need to be recognized as a medical home, you just have to have submitted that NOI to say I’m getting recognized by this body, and we’re ready to begin.

Another common question is, “I’m participating in the CMS demo project and I have three years to achieve NCQA Level III recognition. Do I still have to submit an NOI?” Yes, you still need to submit an NOI to meet this funding requirement. In addition for the CMS demonstration participants, in order for your final survey - to receive your final survey, you will need to submit an NOI through the HRSA initiative - NCQA initiative anyways because that is how that final survey is covered. So you’re kind of killing three birds with one stone.

Slide 11, what is the NOI process? So if you’re interested in the federal initiative, all you need to do is go to the HRSA.gov Web site, and if you simply search the term PCMH and/or accreditation, it will direct you to that technical assistance page and the program assistance letter. That gives you all the information on what the initiatives are, how to apply for them, as well as a copy of the Notice of Intent that you can then submit to HRSA.

The next question is, “My organization has discovered that our original project will no longer work. Can we propose a different project?” As I’ve mentioned a couple times already, yes, but you must submit a revised work plan and budget if applicable to your project officer.

And the last question is, "Will I receive notification once my report has been reviewed and accepted?" And the answer is yes. Once your interim report has been accepted by the bureau, EHB will send an automated email to the address on file once your interim report has been approved. So you will receive confirmation that everything has gone through.

And the last question, which actually isn't on here, but we have been getting a lot of, especially recently, is, "How do I know which PCMH initiative is right for me?" We don't endorse one organization over the other. And there are many paths to a patient-centered medical home.

So what we instruct grantees to do is, you know, the health center's goal is to remain viable. So if one of these recognitions are tied to enhanced reimbursement, or meets a state PCMH initiative, we suggest that you follow whichever one will help you remain viable.

If you don't have any of those options available to you and you still want additional kind of guidance, we actually have some comparison charts on those PCMH initiative technical assistance pages. So again, if you go to the HRSA Web site, search for PCMH or accreditation, on each of those pages on the right-hand side, you will see a link to the comparison chart, and that actually compares the medical home provided by NCQA to the medical home provided by The Joint Commission and AAAHC.

I will say for the joint commission, in order for you to receive PCMH recognition, you must first be accredited. So, I know we have about 270 or health centers that are accredited, and from the conversations that we've been having, those PCMH products are very appealing. So really, it's whatever best fits your needs and is in line with your quality improvement goals.

So with that said, I'm going to turn it over to Michelle who is going to provide some information on more of the logistics of how to actually submit your report.

Michelle Bright: Good afternoon, everybody. As Nina mentioned earlier, this interim report is handled as an Other Submission of our standard submission process. So you would log into your EHBs and you would open your H80 Grant Handbook, and once in your H80 Grant Handbook, you would simply go to your Other Submissions section.

And right there, within that section, you'll see the PCMH Interim Report. And you could simply click on "Begin Submission." And right within that submission there will be a link for you to click to download the templates. And you would download and save the template to your computer. Complete it according to the program instructions that Nina has reviewed that are provided on the Web site.

I'll mention it again, even though Nina has mentioned it a couple times, just because it is so important, that you should complete the template on a PC and not a Mac. We're not anti-Mac by any means, it was just that the technical folks who work behind the scenes on EHB were just not able to figure out a way to get that data out of Excel completed on the Mac. As Nina said, there's programming in there so the data can be easily extracted. And so we really do need those templates completed on a PC.

Once you have completed your document and you're ready to submit, you will go back into EHB, back into that PCMH interim report submission, and you would attached the - your completed program template by using the Attach button. And once the document is attached, you simply click Submit. As always, there's a confirmation page that yes, you really do want to submit your report. And that's pretty much it.

You know, as I said, it's a standard Other Submission, something I'm sure you've all done many times. So from my end, that's it.

Nina Brown: Okay. So Michelle I will ask you one question that we've been getting. We have been notified by some grantees that the Excel document is password protected. So if health centers are in that situation, they should contact the help desk at HRSA?

Michelle Bright: Yeah, because my - we were getting some reports of that initially, though my understanding is that it was corrected...

Nina Brown: Okay.

Michelle Bright: ...when they downgraded the version.

Nina Brown: Okay.

Michelle Bright: Evidently it was in the latest version of Excel and they downgraded it to something that's acceptable in the 97-2003. So I do think that solved the problem. I'm not aware of anyone still getting those password-protected messages.

Nina Brown: Okay, awesome, great. Okay, so with that, I would like to take a moment and open it up for questions.

Mark Yanick: Operator would you please give the audience the instructions, please?

Coordinator: Thank you. At this time, if you would like to ask a question over the audio, please press star 1 on your touchtone telephone. You will be prompted to record your name slowly and clearly so that you may be announced. Once again, please press star and 1 on your touchtone telephone. One moment.

Nina Brown: And while we're waiting for the questions to come in, I would like to let everybody know, if you have additional questions or comments or need assistance in completing your report, you can receive that and reach me through the following email address. It's O as in "other," Q, D as in "dog," OQDcomments@hrsa.gov. So OQDcomments@hrsa.gov. If you email that I get those directly and can answer any additional questions that you might have.

We will also be posting a Frequently Asked Questions on the Web site following this call as well as a transcript and recording of the call. So that should be posted within the next week, week and a half.

Coordinator: We do have a question from (Casey Payne). Your line is open.

(Casey Payne): Actually, I was trying to find these slides on the Internet, I did not have that. I do have that now. I apologize.

Nina Brown: Okay, great.

Coordinator: Our next question will come from (Cheryl Moss). Your line is open.

(Cheryl Moss): Yes, I have a question regarding the terms and conditions that we received on 9-19-2011. It stated that the dates that everything was due by the first one was 4-30-2012 and then the next one was 11-1-2012. Have those dates changed?

Nina Brown: No, they haven't. That's when the reports are due. So the interim report is due April 30 and the final report is due November 1.

(Cheryl Moss): What was the report that you were talking about was due September, in the slides?

Nina Brown: Oh, it wasn't anything new, I was just mentioning in terms of the NOI submissions, I was just encouraging grantees not to wait until September if they can get their NOI in early, to kind of get one of those first seats to do that. So that's not a deadline, that was just more of a friendly encouragement.

(Cheryl Moss): Okay, thank you.

Nina Brown: You're welcome.

Coordinator: Our next question will come from (Kristin). Your line is open.

(Kristin): Hi, yes, I have a quick question regarding - there's no budget or any expenditure reporting with this interim report, correct?

Nina Brown: Correct, you're just reporting on those three key activities in the Excel file, so there's no financial reporting.

(Kristin): So just program updates. And will it be in form of an FFR in November? I'm just saying that because the funding was attached to our NGA for the current grant year, but our grant year will end April 30 and then we'll start a new grant year May 1, so I just wanted to figure out what was the - when we would be reporting. Is it separate from reporting out our funding stream against the funding that we received through our 330 grant, that we have to send in the FFR for that in July, does that make sense?

Nina Brown: Kind of, and if I don't - and I will get clarification from Grants Management on this as well and add it to the Frequently Asked Questions. But this interim report is just on the program activities. In terms of the end of your budget period, we have been working with your project officers on that and how you would carry this over.

So I would contact your project officer who can give you more information about that, but I will also contact Grants Management on my end to get a solid answer for you. And so just so I understand your question correctly, you're asking in the final report, will you be required to submit an FFR or any type of financial reporting.

(Kristin): Correct.

Nina Brown: Okay.

(Kristin): And then the second part of that is then, this project year crosses our 330 grant year...

Nina Brown: Right.

(Kristin): What is it - how are we reporting against it and will those funds - will we have to do basically an extra step requesting a carryover of any unobligated funds into - and will that count, you know, for or against our designated amount for the next year of our 330 grant?

Nina Brown: Right. So if your budget period starts in the middle of this funding opportunity, grantees have been carrying over the unused PCMH funds. And that's acceptable up until September 19 when the project period is over. And I will also add in language about that for you in terms of what should you anticipate and plan on doing as the grantee in the Frequently Asked Questions as well.

But your project officers are all well-versed on that information and can help you through that process.

(Kristin) Okay, great. Thank you so much.

Nina Brown: You're welcome.

Coordinator: Our next question will come from (Dana Knowles). Your line is open.

(Dana Knowles) Yes, my question was sort of related. What was the project period that was - the notice of award was dated the - September 19. And so we were trying to determine if that was our project period for a 12-month period or is it with our current budget period?

Nina Brown: Yes. And that's a good question. The project period starts the date of the NGA, so September 19 of 2011 to September 18 of 2012.

(Dana Knowles): And so our finance officer is having the same question. We got a notice from a project officer. It sounds like we were - at first we thought were doing a no-cost extension, but it's whatever funds we have not used...

Nina Brown: Right. To carry...

(Dana Knowles): ...we roll over - we carry over.

Nina Brown: That's correct.

(Dana Knowles): Okay. Thank you.

Nina Brown: You're welcome.

Coordinator: Our next question will come from (Susan Crawford). Your line is open.

(Susan Crawford): Hi, I think I have that same - similar question about the carryover. If the end of the project period is September 19 and we haven't spent all those funds, we can carry it over? Is that correct?

Nina Brown: No. The funds have to be expended within the 12 months starting September 19, 2011 to September 18, 2012. So, really the carryover only applies if your budget period start date falls somewhere in between there and you have funds that you have not yet expended for the PCMH supplemental. But all projects and all monies related to the supplemental funding need to be completed and expended by September 18 of 2012. Does that make sense?

(Susan Crawford): Yes, that's exactly what I was asking. Thank you.

Nina Brown: Great.

Coordinator: Our next question will come from (Rebecca). Your line is open.

(Rebecca): Hi, my name is (Rebecca) and I had a question about who our project officer is actually at our health center. I'm new to the process and I'm trying to kind of start off where the last person submitted the information. So is there a way to find out who the best - who our best person to contact with questions is besides the email that you provided?

Nina Brown: If you look at your most recent NGA it should list your project officer. Or, I'm sorry, we no longer call them NGAs - your most recent Notice of Award should list your project officer.

(Rebecca): Okay, wonderful. Thank you.

Coordinator: Our next question will come from (Henry Solis). Your line is open.

(Henry Solis): Hi. I just wanted to know, on the NOI, is there a specific form or format that we have to use? We're working already with joint commission on that, but the NOI part, we're just wondering if there was a particular form or format.

Nina Brown: So for the federal initiative, the accreditation and the NCQA initiative, there is a one-page NOI document that asks basic demographic information about your health center for us to track that. Are you currently working with The Joint Commission through HRSA's initiative?

(Henry Solis): Yes.

Nina Brown: Okay. So you have then already submitted the NOI to get into the initiative? So you've met that requirement. If you have more specifics about that, Dr. Harriet McCombs is actually the program lead for accreditation and she can give you all the information. But if you're already in the HRSA accreditation initiative, you've already submitted that NOI.

(Henry Solis) Okay, thank you.

Nina Brown: You're welcome.

Coordinator: Our next question will come from (Victoria Davis) - I'm sorry, (Victoria Derrick). Your line is open.

(Victoria Derrick): Hi. It's actually (Victoria Derrick). I had actually a very similar question. Back in like about May of 2011, we actually submitted an NOI to the NCQA. So would we need to - but, after that we figured out that we didn't know what we were really doing and the PCMH supplemental grant fund has significantly helped us. So would we need to resubmit an NOI?

Nina Brown: So are you currently - you're already in the NCQA initiative and you've received your self-assessment tools from NCQA?

(Victoria Derrick): Right.

Nina Brown: Then you have already met the NOI requirement. So all you would do - for everyone that's already participating in an initiative through whether that be accreditation, and you've submitted your NOI for PCMH, in your report all you'll write is that in May 2011 we submitted our NOI and were accepted to the HRSA NCQA initiative.

(Victoria Derrick): Okay. You know what, I don't know if we were accepted, though, now that I - now that we're talking about it. So, in that case, and I'm going to double-check it, what would we do?

Nina Brown: Okay. You should have received an email from the PCMHHInitiative@hrsa.gov mailbox, and you would have been contacted by NCQA and they would have sent you a self-assessment tool.

(Victoria Derrick): Yeah, okay.

Nina Brown: Okay, what's your health center's name? I'm actually the program manager for that NCQA contract and I can look that up for you.

(Victoria Derrick): Okay, that would be great. It's East Valley Community Health Center in West Covina, California.

Nina Brown: Okay. I will look that up for you.

(Victoria Derrick): Thank you.

Nina Brown: You're welcome.

Coordinator: Our next question will come from (Kathy Ganz). Your line is open.

(Kathy Ganz): Yes, I had a question along the same lines. About a year and a half ago, we submitted Notice of Intent, we did get our - a license number for NCQA, they set us up with that. Subsequently, we got accepted for six of our sites for the CMS demonstration project. They reassigned new license numbers for NCQA and then they went back and deactivated the ones that I had done through HRSA.

Nina Brown: Right.

(Kathy Ganz): So, is that okay?

Nina Brown: That's fine. The self-assessment - it's the same tool, whether you got it from the CMS end or the HRSA end. So you would have been filling out the same tool. That's not a big issue at all.

(Kathy Ganz): Okay. Thank you.

Nina Brown: You are already in the initiative so you've met the NOI requirement as well.

(Kathy Ganz): Thank you.

Nina Brown: You're welcome.

Coordinator: The next question will come from (Tina Riley). Your line is open.

(Tina Riley): Hi, I have two questions about the NOI. Is that a hard deadline that the survey tool has to be submitted within one year of the NOI date?

Nina Brown: That is - it's one year from when your NOI moves forward to the accrediting body. So we do processing and verification on our end to check things like anticipated final submission date, you know, make sure that your health center is in good standing.

And we don't move your NOI forward until you - it checks out within the bureau, so that's something that we would actually work with you on. But once it gets to that accrediting body, we do want you to submit within a year. We can, you know, we've had grantees who've needed to call us for extenuating circumstances and we've worked with them through that, but that's the timeframe we want to, you know, everyone to have in their head.

(Tina Riley): Okay, so I just want to be clear. So if we already have our username, we have access to our survey tool, we got one of the NOIs on 12-19, which means can actually start uploading documents now. That means that we have to submit that survey tool by 12-19 of 2012 this year. Is that correct?

Nina Brown: That's correct.

(Tina Riley): Okay. And then the other question I had - since we have two health centers, and we have two different NOI dates, is it possible, since they're coming under one organization, if need be, to submit at the later date versus the earlier date?

Nina Brown: What health center are you from?

(Tina Riley): Spectrum Health Services...

Nina Brown: Spectrum.

(Tina Riley): And we're submitting for (Haddington) Health Services, and (Broad Street) - I mean (Haddington) Health Center and (Broad Street) Health Center. One NOI date is 12-19-11 and the other one is 1-26-2012.

Nina Brown: Okay. (Broad Street). Let me - when I go back, let me look into that and I will contact with you directly to follow up with you on that.

(Tina Riley): Okay, I appreciate that. I'm probably not the person on your list. Dr. (Marissa Rogers) is probably the contact person. However, I'm newly hired here as a PCMH team leader.

Nina Brown: Okay.

(Tina Riley): So, should I send you an email with my contact information so you can forward that information to me personally?

Nina Brown: Yes, please do that. That would be great.

(Tina Riley): And can you give me your email address once again please, because I think I missed it when you were giving it earlier.

Nina Brown: The email address to contact me directly is OQD, like Office of Quality and Data, C-O-M-M-E-N-T-S at OQDcomments@hrsa.gov.

(Tina Riley): Okay, great, I'll send that right now.

Nina Brown: Great. Thank you.

(Tina Riley): All right, thank you very much.

Coordinator: Our next question will come from (Krista Boyd). Your line is open.

(Krista Boyd): Hi. I missed a part of what you were saying on the Reporting and Reviewing Contents slide. Could you just clarify - I heard you say something about if you're doing all six domains, you can do one narrative and apply it. And also, the timeline for completion of projects, is that something that we need to include in the narrative or as separately?

Nina Brown: No, you're right. So if you had a project that covered all six domains, you only need to update one cell. You don't have to put the same information in, you know, the 30 different cells.

(Krista Boyd): Right.

Nina Brown: The timeline for completion of projects was just that the reports are due April 30 and the final report...

(Krista Boyd): Oh, I'm sorry. Okay.

Nina Brown: No, that's fine. And at the end of - all projects should be completed by September 18, 2012.

(Krista Boyd): Okay. Thank you.

Nina Brown: You're welcome.

Coordinator: Our next question comes from (Jill Shernfoos). Your line is open.

(Jill Shernfoos): Yes, I'd like to ask, if we would like to change some aspects of our project, are we allowed to change to a different domain than we identified in the original application?

Nina Brown: Yes, if you found that based on your health center's activities and their quality activities and your general PCMH process that a different project and a different domain would better fit your organization, that is fine to change that as long as it meets one of the six domains. Just update your project's narrative and work plan and budget, if applicable, with your project officer.

(Jill Shernfoos): Okay, great. Thank you.

Nina Brown: You're welcome.

Coordinator: Our next question will come from Dr. Wilhelmina Lewis. Your line is open.

Dr. Wilhelmina Lewis: Hello. I believe the majority of my question has already been answered via the other callers. However, I know that one caller previously asked for confirmation that the NCQA application - notice of intent, rather - that they had submitted also confirmed that they had been enrolled via HRSA. Is there any way that we would be able to check that for our health center as well?

Nina Brown: Yes, Dr. Lewis. Can you just shoot me an email, to the OQD comments box?

Dr. Wilhelmina Lewis: Yes.

Nina Brown: So OQDcomments@hrsa.gov. And just for me on my end, what's the name of your health center?

Dr. Wilhelmina Lewis: Florida Community Health Centers.

Nina Brown: Okay. All right. So we'll do a tag-team approach.

Dr. Wilhelmina Lewis: Thank you so much.

Nina Brown: You're welcome.

Coordinator: Our next question will come from (Dana Lennon). Your line is open.

(Dana Lennon): Good afternoon. I just wanted to say I downloaded the report template today and it's still password protected. Can someone look into it again?

Michelle Bright: So are you - said you just accessed it today?

(Dana Lennon): Yes, and it's still password protected.

Michelle Bright: And did you try saving it onto your computer first and then opening it?

(Dana Lennon): Yes.

Michelle Bright: You may - in the meantime you may also want to contact the BPHC help line, because they do have the template that they can email to you.

(Dana Lennon): Okay. Great, thank you.

Coordinator: Our next question will come from (Colleen). Your line is open.

(Colleen): Hi, yes. So how do we know the date that our NOI went to the accrediting body? Is it the dates that the NGA based on our participation through the HRSA demonstration project?

Nina Brown: For the NCQA initiative, when we send your NOI forward to NCQA, we send you an email. We reply to the - whoever submitted the original NOI, usually with the verbiage of “Congratulations. Your NOI has just been submitted to NCQA on this date. We’ll check back to see how the process is going.” So you would have received an email from HRSA with the date that your NOI was sent forward.

(Colleen): Perfect. All right, thank you.

Nina Brown: You’re welcome.

Coordinator: Our next question will come from (Nancy Malt). Your line is open.

(Nancy Malt): Yes, thank you. I have a couple questions. When we did our initial application for the supplemental funding, we did it based on one of our sites and we applied at - for two of our sites for the CMS demo project. One of the sites was approved but it wasn’t the one that we outlined our intent on. Can we just now focus on the site that did get into the CMS project for this supplemental funding?

Nina Brown: That’s fine, because ultimately one would expect that if you have multiple sites, you know, the PCMH transformation process - every health center goes about it differently. Some want to do all of their sites at once, some want to start at one and work through that process and them move it to the others.

So the tools that you've implemented and lessons that you've learned you will be able to transfer to your other sites. So that's fine.

(Nancy Malt): Okay. And then my other question - if we have been approved in the CMS demo project, then is then our NOI completed?

Nina Brown: You still - if you submitted and were approved for the CMS demonstration project, you still need to submit an NOI, and this is been a point of confusion. So I apologize for that, but HRSA is partnering with CMS on their demonstration projects, so for all of those that got accepted or had sites accepted into the demonstration, you received a self-assessment tool. That's the same self-assessment tool that you would receive if you had just gone through the HRSA NCQA initiative when you first begin the process.

Now, for all of the CMS participants, in order for you to complete and take your final survey, that is getting covered - the cost of that is getting covered through the HRSA PCMH NCQA initiative. So you're going to have to submit and NOI to HRSA anyway, once you're ready to submit your final survey. So the answer is that, yes, you will still need to submit your NOI.

We'll go through and process that and see kind of where you are and what your timeline is for submitting that final survey, you know, before moving it forward and go from there. But, yes, you will need to submit an NOI. Does that make sense?

(Nancy Malt): Well, kind of, but is the survey you're talking about then different than the readiness assessment survey that we do as part of the CMS project?

Nina Brown: Well, the readiness assessment survey is what you have already received - and I believe the next update is due April...

(Nancy Malt): May 1...

Nina Brown: It's the same - yeah - it's the same tool that you get from NCQA if you were to go through the initiative. So what I'm referring to is that final survey where you put in all your documentation and hit Submit and NCQA scores it and says you're a level one, two, or three medical home. That survey gets paid for through the HRSA initiative. So you will need to submit an NOI anyways for tracking purposes on our end in order to get that final survey tool covered.

(Nancy Malt): Okay, and then you talked about that there was a one-page reference or something for the NOI. Is that referable to this, then?

Nina Brown: Yeah, that's exactly what you would need to submit and that is - you can access that on the HRSA Web site. So if you go to the HRSA.gov, and then search for PCMH, it's the first link that comes up, and on the right-hand side it will say NOI pdf format. And you just fill that out. It's real quick, and email it over and we go from there.

(Nancy Malt): Okay, and then just one more question. So we don't have to do a revised narrative or anything if we're just reporting on a different site.

Nina Brown: Mention that in your narrative. If you're doing the same exact project, no, you don't need to revise the narrative or work plan. I would just mention that in your report that, you know, we worked up to the CMS demo so we have decided to move these activities to this site.

(Nancy Malt): Very good. Thank you so much.

Nina Brown: You're welcome.

Coordinator: Our next question will come from (Milan Rama). Your line is open.

(Milan Rama): Hi, I just wanted to provide some information on the password. I did try to attempt that this afternoon as well, and did get the password - I was prompted to enter the password, and when I went to the Tools menu and went to the Protection submenu after that, and I just did Okay, I didn't have the password. I pressed Okay, and it did allow me to save the changes. So for the others who were asking questions on how to save that or work around the password, that would be the workflow that you would follow.

Nina Brown: Can you repeat that? You went into the Tools...

(Milan Rama): I went into the - when I tried to open the template, I went - I got the message that the cell or chart you are trying to change is password protected and therefore read-only. So once I got that message, I went to the Tools menu option, and then under that, the Protection submenu option. Once I did that, it asked me - prompted me for the password. I just clicked Okay and it did allow me to change and capture that information I was trying to save and update.

Nina Brown: Well thank you for passing along that little tip. Yeah...

(Milan Rama): No problem.

Nina Brown: So, but yeah, I'm - there's something in her kind of very befuddled about why this is even happening. But, yeah, we'll certainly keep looking into it, and now everyone out there has two resources, you know, either getting it directly from the business help line or following this tip that's going into the Tools and Protection submenu and just clicking Okay.

(Milan Rama): Yeah, I mean it will still ask you for the password, but if you click Okay, it will allow you to make the changes and enter the information you want to. So, I do have another question on the NOI again, and I apologize because it's been covered in the last few questions.

But we have ten sites that received the NCQA recognition in level three and two of our sites have also been approved for the CMS demonstration. Our resubmission is not due until 2014. Do we still have to go through the NOI process?

Nina Brown: For the funding or for your resubmission?

(Milan Rama): Toward the resubmission.

Nina Brown: When you're ready to resurvey, you will have to fill out another NOI and when you select the type of survey, you would select Renewal.

(Milan Rama): Okay, but that's due until 2014...

Nina Brown: Correct...

(Milan Rama): So as this grant requirement is concerned, we would just have to update on the PCMH efforts that we have made related to the $35,000 PCMH grant, correct?

Nina Brown: Correct. And just as a reminder for everyone out there that's already recognized, this opportunity was to achieve, enhance, or maintain your PCMH recognition. So, if you're already recognized, the NOI requirement is a moot point for you, and you can just say, you know, we received our PCMH recognition through xyz on, you know, September 2011, or whatever.

So you can just write that in there because that would not apply for you because you're already recognized.

(Milan Rama): Okay, thank you. And then, my other question was about the financial report with this update that's due next month. We don't require a financial update, correct?

Nina Brown: That's correct.

(Milan Rama): Okay. That's all. Thank you.

Nina Brown: You're welcome. Thanks (Milan).

Coordinator: Our next questions will come from (John Ruiz). Your line is open.

(John Ruiz): That's (John Ruiz) and my question has been answered. Thank you very much.

Nina Brown: Great. Thank you, John.

Coordinator: Our next question then will be from (Sue Roeble). Your line is open.

(Sue Roeble): Hi, thank you. I do have a question about how to access the interim report. I did not hear where you said you log into to find that information.

Nina Brown: Once you're in EHB, you open up your H80 Grant Handbook, and then in the Other Submissions section, that's we're you'll find that PCMH interim report submission.

(Sue Roeble): Okay, you're kind of faint, so I still didn't hear where you said the initial place was to go to find this.

Nina Brown: Sorry about that. Its - once you're in your EHB, you go into your H80 Grant Handbook...

(Sue Roeble): Okay, excuse me if I sound ignorant here, but I don't know what the EHB is.

Nina Brown: Oh, EH - Electronic Handbook. That's pretty much how all of your activity is for your grant is handled - all your reporting. I'm thinking there must be some other folks at your organization who probably normally handle that side of things.

(Sue Roeble): And that's possible. Were there any kind of emails notifying us that this call was coming up because we did not receive anything about that?

Nina Brown: There was two notifications sent out on the Grantee and National Cooperative Agreement listserv through the Bureau. The original email was sent out I believe about two or three weeks ago, and then there was a reminder email sent out Monday.

(Sue Roeble): Okay, and who would we contact to make sure that we're getting those emails?

Nina Brown: You would contact...

(Sue Roeble): A person that does our grant writing did not receive that information either.

Nina Brown: Okay, I guess it would depend on who's registered on the listserv, so if you contact the Office of Training and Technical Assistance - Stephanie, is there a particular...

Stephanie Crist: Yeah, I believe it's (Maria Velasquez), but if you want to email me, actually, and I can follow up, my email is S Crist - that's S-C-R-I-S-T - no H – SCrist@HRSA.gov. We can find that for you, and that's out of my office.

(Sue Roeble): And what's your name? I'm sorry.

Stephanie Crist: My name is Stephanie, and its scrist@hrsa.gov.

(Sue Roeble): Okay, that would be helpful. Thank you.

Coordinator: Our next question comes from (Pam Davis). Your line is open.

(Pam Davis): Yes, some of my questions have been answered, but when I went on the template, mine is in Excel - Excel is fine to attach.

Nina Brown: Yeah, the actual report is an Excel document.

(Pam Davis): Oh, okay...

((Crosstalk))

(Pam Davis): It is in Excel. Okay. That's how mine came up. Now, if we are going to request a change with a project narrative to plan a budget, how do we submit that to our project officer?

Nina Brown: Well, you would contact your project officer and let them know that you're changing the project. You can email them the revised project narrative and work plan, and you would submit the revised budget through the prior approval request module in EHB.

(Pam Davis): Prior approval, okay.

Nina Brown: And they can help walk you through that process, too.

(Pam Davis): Okay. All right, thank you very much.

Nina Brown: You're welcome.

Coordinator: Our next question comes from (Temple Robinson). Your line is open. (Temple Robinson), your line is open. We'll go to the next one. (Stacy), your line is open.

(Stacy): Hi, good afternoon. My question revolves around carryover for our FFR on the H80 grant. Do we - if we draw down the $35,000 now, do we need all of the invoices to back that up so that we can avoid a carryover request?

Nina Brown: That is an excellent question that I do not know the answer to, so let me contact grants management, and I will be sure to add that to the Frequently Asked Questions, because that's a good question.

(Stacy): Okay, because we would love to avoid a carryover request.

Nina Brown: I understand.

(Stacy): Okay. Thank you.

Coordinator: Our next question will come from (Claudia). Your line is open.

(Claudia): Hello and good day to you. I have two questions. The first is - can you hear me?

Nina Brown: Yes.

(Claudia): Okay. When do I submit the NOI? Now, I recently thought that I would submit it right away, even before we had any PCMH items accomplished, and then I was advised to wait until all of our PCMH activities met the survey tool.

Nina Brown: So, really, that is a decision that is up to your health centers. Some grantees submit their NOI when they have not even started the process and then they use the one-year period to go through - because, for NCQA if you submit your NOI you get the self-assessment tool, which you fill out and complete. And it helps you identify the areas you need work on and prioritize.

So, some people do that, get the tool, use that, and transform their practice over that year. Some folks have decided to do all the work on the front end, then submit their NOI, and submit their final survey within one to two months of actually, you now, getting moved forward to NCQA.

So it's however your health center chooses to prioritize the process that best fits your needs.

(Claudia): Thank you. And then, I thought we had to complete all six domains to meet level one meaningful use. Am I thinking about two separate categories?

Nina Brown: Yes. I think you are, because this particular funding was just for PCMH, and I don't have any of my (HIT) folks in the room who could speak to meaningful use. But if you shoot me an email, maybe I can give you a ring and connect you with the right person to answer that question.

(Claudia): Thank you. And that's it for me.

Nina Brown: And I see that we have about - it's one minute to the hour, so why don't we take questions until about five after. And then unfortunately, if we run out of time, feel free to send an email through that OQDcomments@hrsa.gov email box, and I will get back in contact with you. So next question?

Coordinator: We will go back to (Temple Robinson). Your line is open.

(Temple Robinson): Yes, I'm going to send some through the contact, but I want to make sure I was clear, that if we do the joint accreditation as well as the PCMH that we can do them simultaneously with AAAHC, but with Joint Commission, we have to be accredited by Joint Commission prior to doing the PCMH piece. Is that correct?

Nina Brown: So let me clarify, and I'm glad you asked that question. So, what I meant by that was the PCMH product for The Joint Commission, it's not a stand-alone product, so you can't just say, Joint Commission, I want PCMH, you have to be accredited. Now, if you have to take a survey to get accredited, they can do the survey for the PCMH at the same exact time. They don't have to come - they do it all at once, they don't come out and do two separate surveys.

(Temple Robinson): Right.

Nina Brown: So, does that answer your question, or not really?

(Temple Robinson): And the AAAHC piece is similar - they have a joint product and they have a stand-alone product. Is that correct?

Nina Brown: That's correct. And Dr. Harriet McCombs can give you more information...

(Temple Robinson): Sure.

Nina Brown: As well, for accreditation.

(Temple Robinson): All right. And then, I guess the next question I can ask - we did this survey tool - NCQA survey tool, then the notice of grant, I'm sorry, then the letter of intent. So, if we're on this call, does that mean that the letter of - the notice of intent has been accepted?

Nina Brown: No, this called is just to tell you how to fill out the interim report...

(Temple Robinson): If we're a grantee and we received this email does that mean that that letter of intent has been accepted?

Nina Brown: Which email are you referring to?

(Temple Robinson): The notice about this conference call today.

Nina Brown: No, this got sent out to all grantees and cooperatives...

(Temple Robinson): Got it.

Nina Brown: If you sent your NOI through you would receive a confirmation from the PCMHHInitiative@hrsa.gov mailbox that says "Thank you for your NOI." We will begin processing and we will contact you once your NOI has been moved forward to NCQA. Okay.

(Temple Robinson): Let me ask this question. If we receive the funds then that means that we have been accepted?

Nina Brown: No. So if you received the $35,000 that means you submitted the application, work plan, narrative, and budget, and proposed a project in one of those six domains.

(Temple Robinson): Very good.

Nina Brown: So as a requirement of receiving the funding, you have to submit an NOI to a federal, state, or local initiative. So that's when you would go to the HRSA Web site and search either Accreditation or PCMH, and on the right-hand side of the screen there will be a link to the one-page NOI document that you would complete and send to the specified email address. And that's essentially saying you're ready to start your recognition through either The Joint Commission, AAAHC, or NCQA.

(Temple Robinson): Thank you. That's very clear. I appreciate that.

Nina Brown: No problem. Thank you. So I'm only going to answer two more questions.

Coordinator: (Beth Serini) your line is open.

(Beth Serini): Hi. We're having a lot of the same questions about the NOI. We actually sent one in over a year ago to get what we thought was technical assistance from NCQA and we're not anywhere close - we need to revise the dates on it. So I don't know if I need to just get an email or phone number and talk to someone. We're not even sure where it is because we also got combined with the HRSA demonstration process and this original NCQA one. And we had two licenses and they combined them. And actually, they're under two different names, so I'm really confused. So I'm wondering if I need to just talk to someone.

Nina Brown: Yeah, why don't you email the OQDcomments@hrsa.gov mailbox and give me your contact information and I'll give you a call and help walk you through that.

(Beth Serini): That would be wonderful. Thank you.

Nina Brown: You're welcome. So, Sandy, I think we have time for one more question.

Coordinator: Our next question will come from (Ron Berkeley). Your line is open.

Nina Brown: Hi, Ron.

(Ron Berkeley): Hi, Nina. I'm glad you clarified. This is (Ron Berkeley) from The Joint Commission and I'm glad you clarified for (Temple) that the way that you worded it that in fact if you're not yet accredited, you can do both at the same time, both the accreditation and the primary care home.

The only confusing part is the application. As you pointed out, if you are already accredited, one of our 300, and you would like the primary care medical home, there is a box check-off on our Joint Commission application. Or, you can directly call (Rick Zordan), (Rick Zordan) is the account executive for all the community health centers.

But if you're not yet, and would like to do both at the same time, the application does just read "Accreditation" - excuse me I didn't mean to say application - the Notice of Intent. The Notice of Interest only says "Accreditation."

You do have to indicate it in the Comment box on that NOI. So you check off - if you want Joint Commission, or you want the AAAHC - then in the Comments also indicate that you'd like the notice of - that you'd like the primary care medical home, or just say medical home, and that will be the method for which then the Bureau of Primary Health Care would know that you're interested in both.

The advantage for going through that, as Nina has pointed out, is that there are some technical assistance funds available for support for both the accreditation and the primary care medical home. And that this is a opportunity, if you wanted to do both at the same time, there is a - the

Bureau of Primary Health Care will support Joint Commission's, primary care medical home, AAAHC, and/or the NCQA.

So if you're part of the CMS demonstration project, which is a site-specific approach, and you'd also like to augment that with your other sites that are not part of that demonstration project, that there's the option for doing both as part of the support that the bureau has for the medical home initiative in general.

I hope that's clear in terms of augmenting what this very useful, very valuable session I think has offered to everybody.

Nina Brown: Great. Thanks so much (Ron) for that feedback. All right, so at this time, I would like to bring the call to a close. I would like to thank everybody for taking the time to join on. Again, if you have any questions that weren't answered today or things are unclear, and you would like some additional assistance, please feel free to email me at OQDcomments@hrsa.gov. One last time that is OQDcomments@hrsa.gov, and I will get back with you.

An MP3 of this call will be posted on the TA Web site where you located the slides in addition to Frequently Asked Questions that will highlight the questions that were asked during the call, especially around the financial reporting section.

If you had a question about your specific health center, whether you have submitted an NOI, again, just email that email of the OQD address and I can give you a ring or shoot you an email regarding what your status is.

So, thank you everyone, so much. Good luck with the rest of your projects and we're excited to see the work that you're doing and continue to do.

Coordinator: Thank you. That does conclude today's conference call. Thank you for participating, and you may disconnect at this time.

END