User Guide: Medical Coordinator

This user guide provides information specific to Medical Coordinator users of the Wisconsin Prescription Drug Monitoring Program (WI ePDMP).

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FOR ADDITIONAL INFORMATION

Web:  pdmp.wi.gov
Email: pdmp@wi.gov

WI ePDMP User Guides can be found at: https://pdmp.wi.gov/training-materials
Section 1: Overview

The Wisconsin Prescription Drug Monitoring Program (WI ePDMP) is a tool to help combat the ongoing prescription drug abuse epidemic in Wisconsin. By providing valuable information about controlled substance prescriptions in schedules II-V that are dispensed in Wisconsin, the WI ePDMP can aid healthcare professionals in their prescribing and dispensing decisions. The WI ePDMP fosters the ability of pharmacies, healthcare professionals, law enforcement agencies, and public health officials to work together to reduce the misuse, abuse, and diversion of controlled substance prescription drugs.

Monitored Prescription Drug, as defined by Wis. Stat. 961.385(1)(ag), means a substance identified in s. 961.16, 961.18, 961.20, or 961.22 or a drug identified by the board by rule as having a substantial potential for abuse. The WI ePDMP does not collect or contain dispensing information for prescription drugs that are not in schedules II-V. The WI ePDMP does collect dispensing information for monitored prescription drugs dispensed by pharmacies in Wisconsin, including out-of-state, mail order and Veterans Affairs pharmacies.

Not all prescriptions drugs are reported to the WI ePDMP. Common exclusions include the following:

1) Prescription drugs not covered by the definition of monitored prescription drug.
2) Monitored prescription drugs, such as methadone and buprenorphine, that are dispensed by federally funded opioid treatment programs, due to federal regulations that prohibit reporting to state PDMPs.
3) Monitored prescription drugs administered directly to a patient.
4) Monitored prescription drugs dispensed by a veterinary clinic.

Required WI ePDMP Use by Prescribers

Effective April 2017, Wis. Stat 961.385(2)(cs)1 requires that the prescriber, or their delegate, view a patient's WI ePDMP record before issuing a prescription order for a monitored prescription drug. The exceptions for review defined by Wis. Stat 961.385(2)(cs)2 are:

1) The patient is receiving hospice care, as defined in s. 50.94 (1) (a).
2) The prescription order is for a number of doses that is intended to last the patient 3 days or less and is not subject to refill.
3) The monitored prescription drug is lawfully administered to the patient.
4) Due to emergency, it is not possible to review the patient’s records under the program before the practitioner issues a prescription order for the patient.
5) It is not possible to review the patient's records under the program because the digital platform for the program is not operational or due to other technological failure if that failure is reported to the board.

Medical Coordinator Access

A Medical Coordinator for purposes of accessing the WI ePDMP is defined by Wis. Stat.§ 961.385(2)(cm)2. It allows the WI ePDMP to release non-patient-identifiable information to a person who:

1) Medically coordinates, directs, or supervises a practitioner;
2) Establishes standard operating procedures for a practitioner;
3) Evaluates the job performance of a practitioner; OR
4) Performs quality assessment and improvement activities, including outcomes evaluation or developing clinical guidelines.

The Medical Coordinator role in the WI ePDMP allows access to the Prescribing Practice Metrics for individual prescribers only after the prescriber has accepted the Medical Coordinator’s request in the WI ePDMP.

Disclaimer
The Controlled Substances Board and the Department of Safety and Professional Services (DSPS) make no claims, promises, or guarantees about the accuracy, completeness, or adequacy of the information stored in the WI ePDMP and expressly disclaim liability for errors and omissions in the information. Information obtained from the WI ePDMP is meant to guide and inform the employer, but the WI ePDMP should not be used in isolation to make determinations about a prescriber.

Section 2: Requesting a WI ePDMP Medical Coordinator Account

1. To request a WI ePDMP Medical Coordinator account visit pdmp.wi.gov and select Register.

2. Select Medical Coordinator from the Account Type.

3. Provide your name, position, employer information and contact information. Contact information must be linked to your employer. Accounts listing personal contact information will not be approved.

4. Accept the User Terms and Conditions.

5. You will receive an email once your request for access to the WI ePDMP has been reviewed and approved by DSPS staff.

WI ePDMP user roles cannot be combined; therefore, a user may not request that the Medical Coordinator role be added to an existing Healthcare Professional user account. A separate Medical Coordinator user account needs to be established.
By accepting the User Terms and Conditions you are confirming you understand and agree that:

- You are the person identified in the application for access to the Wisconsin Prescription Drug Monitoring Program and all information contained therein is complete and accurate.
- You are employed by a healthcare facility and your position requires you to perform at least one of the following duties:
  a. To medically coordinate, direct, or supervise a practitioner, pharmacist, registered nurse, substance abuse counselor, or individual authorized under s. 457.02 (5m), Wis. Stat., to treat alcohol or substance dependency or abuse as a specialty to whom the Controlled Substances Board may disclose information stored in the PDMP.
  b. To establish standard operating procedures for a practitioner, pharmacist, registered nurse, substance abuse counselor, or individual authorized under s. 457.02 (5m), Wis. Stat., to treat alcohol or substance dependency or abuse as a specialty to whom the Controlled Substances Board may disclose information stored in the PDMP.
  c. To evaluate the job performance of a practitioner, pharmacist, registered nurse, substance abuse counselor, or individual authorized under s. 457.02 (5m), Wis. Stat., to treat alcohol or substance dependency or abuse as a specialty.
  d. To perform quality assessment and improvement activities, including outcomes evaluation or development of clinical guidelines.
- You will treat the information that you obtain from the PDMP as a medical record and will protect the information in your possession in accordance with federal and state laws governing health care information.
- You will not disclose information obtained from the PDMP for any purpose other than the limited purpose for which the information was released to you.
- You will not disclose information obtained from the PDMP to anyone not employed by or contracted by your organization.
- You understand that the Controlled Substances Board and the Department of Safety and Professional Services make no claims, promises, or guarantees about the accuracy, completeness, or adequacy of the information stored in the PDMP and expressly disclaim liability for errors and omissions in the information.
Section 3: Prescribing Practice Metrics for Prescribers

Healthcare professionals who prescribe controlled substances in Wisconsin can use the WI ePDMP Prescribing Practice Metrics feature to obtain data and visualizations that compare their prescribing to other Wisconsin prescribers in the same self-reported specialty. The metrics summarize the last 100 days of dispensing data in the WI ePDMP based on the prescriber’s DEA Number. In addition to the comparative elements, there are overviews of the prescriber’s controlled substance patient population and estimated annual WI ePDMP usage.

Prescriber View of Prescribing Practice Metrics

1. Name and Account Type are populated from the DSPS licensing system.

2. The DEA number(s) associated with prescriber in the WI ePDMP data.

3. Specialty and Employer are self-reported to the WI ePDMP by the prescriber.

4. Daily Prescribing Volume Ranking is based on the last 100 days of dispensing data in the WI ePDMP and compares the prescriber to other Wisconsin prescribers with the same self-reported specialty.

5. Drugs are summarized by drug class for both number of prescription orders and average doses per prescription.

6. A graph displays the distribution of payment types used. (not available in Medical Coordinator view)
7. A map displays the prescriber’s location, the home addresses of patients prescribed to and then calculates the average distance travelled by the prescriber’s patients. *(not available in Medical Coordinator view)*

8. Concerning Patient History Alerts reflect all dispensing to a patient and are not specific/limited to the individual prescriber’s dispensings to the patient.

9. Law Enforcement Alerts are presented when the Person Affected has current or historical dispensing data in the WI ePDMP associated with the prescriber.

10. Summary of ePDMP Usage is a basic calculation based on the last 12 months of the prescriber’s controlled substance dispensings divided by the number of PDMP patient queries, including queries completed by a delegate of the prescriber. See FAQ for more information.

11. Patient detail for alert counts is obtained by clicking on the hyperlinked number next to the alert type. *(not available in Medical Coordinator view)*
12. Center for Disease Control opioid guidelines (not available in Medical Coordinator view)

13. Complete detail on dispensings associated with the prescriber’s DEA number for the last 100 days (not available in Medical Coordinator view)
Section 4: Prescribing Practice Metrics Access for Medical Coordinator

Prescriber List

The Medical Coordinator Prescriber List provides an at-a-glance view of the Medical Coordinator’s prescribers, based on the DEA numbers entered by the Medical Coordinator, and the last 100 days of dispensing information.

1. The export feature downloads a .csv file that includes the information in the Prescriber List as well as metrics data for the additional drug classes and alert types.

2. View report will navigate to the individual Prescribing Practice Metrics report.

Descriptions of the Prescriber List columns can be found on the following page of this document or below the Prescriber List when logged into the WI ePDMP.
<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Additional Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Status</strong></td>
<td>Current status of the Medical Coordinator request</td>
<td>Not Registered indicates that the DEA number is not associated with an active WI ePDMP user account. It is also possible that an account was created for the prescriber but the prescriber never completed the step to activate the account.</td>
</tr>
<tr>
<td><strong>2. DEA #</strong></td>
<td>Entered by the Medical Coordinator</td>
<td></td>
</tr>
<tr>
<td><strong>3. Prescriber Name</strong></td>
<td>Populated from the WI ePDMP user account</td>
<td></td>
</tr>
<tr>
<td><strong>4. Employer</strong></td>
<td>Self-reported to the WI ePDMP by the prescriber</td>
<td></td>
</tr>
<tr>
<td><strong>5. Specialty</strong></td>
<td>Self-reported to the WI ePDMP by the prescriber</td>
<td>The peer percentile compares the prescribers to other Wisconsin prescribers with the same self-reported specialty.</td>
</tr>
<tr>
<td><strong>6. Metrics</strong></td>
<td>The number of opioid dispensings and average number of doses for the past 100 days, as well as peer percentile.</td>
<td>The at-a-glance view shows metrics for opioid dispensings only. Use the export feature to obtain metrics for the drug classes of stimulants, benzodiazepines and other controlled substances.</td>
</tr>
<tr>
<td><strong>7. # of Patient Alerts</strong></td>
<td>Concerning Patient History Alerts</td>
<td>These are data driven alerts that reflect all dispensing to the patient and are not specific/limited to the individual prescriber’s dispensings to the patient. Criteria for the alerts can be found under the Prescriber List. Use the export feature to obtain counts for additional alert types.</td>
</tr>
<tr>
<td><strong>8. PDMP Usage</strong></td>
<td>Estimated Annual WI ePDMP Usage</td>
<td>PDMP Usage is a basic calculation, based on the last 12 months, of the number of the prescriber’s controlled substance dispensings divided by the number of PDMP patient queries, including queries completed by a delegate of the prescriber. It does not take into consideration delegate queries associated with a different prescriber or other alternative workflows. Prescription orders for a 3-day supply or less are excluded from the PDMP usage calculation, but the calculation does not account for other exceptions to the PDMP usage requirement.</td>
</tr>
</tbody>
</table>
1. Name and Account Type are populated from the DSPS licensing system.

2. Specialty and Employer are self-reported to the WI ePDMP by the prescriber.

3. The DEA number(s) associated with prescriber in the WI ePDMP data.

4. Daily Prescribing Volume Ranking is based on the last 100 days of dispensing data in the WI ePDMP and compares the prescriber to other Wisconsin prescribers with the same self-reported specialty.

5. Drugs are summarized by drug class for both number of prescription orders and average doses per prescription.

6. Concerning Patient History Alerts reflect all dispensing to a patient and are not specific/limited to the individual prescriber’s dispensings to the patient.

7. Law Enforcement Alerts are presented when the Person Affected has current or historical dispensing data in the WI ePDMP associated with the prescriber.

8. Summary of ePDMP Usage is a basic calculation based on the last 12 months of the prescriber’s controlled substance dispensings divided by the number of PDMP patient queries, including queries completed by a delegate of the prescriber. See FAQ for more information.
Section 5: How Prescribers Grant Medical Coordinator Access

Prior to a Medical Coordinator being allowed access to view a prescriber’s Prescribing Practice Metrics, the prescriber must accept the Medical Coordinator request within the WI ePDMP. Once a Medical Coordinator enters a DEA number in the Prescriber List, the WI ePDMP will notify the prescriber of the pending request. It is **highly recommended** that employers send an internal communication explaining the forthcoming WI ePDMP Medical Coordinator access request to prescribers prior to uploading/entering DEA numbers into the WI ePDMP. This will increase the acceptance rate of the Medical Coordinator requests.

Overview of Notification Process
WI ePDMP Communication to Prescriber

There are two notices that are proactively presented to the prescriber by the WI ePDMP when there is a request from a Medical Coordinator to access to the prescriber’s Prescribing Practice Metrics.

1. The prescriber will receive an email at the email address associated with their WI ePDMP account notifying them of the new Medical Coordinator request.

2. The prescriber will be presented with a pop-up to Accept, Deny or Skip the pending Medical Coordinator request. This pop-up will appear each time the prescriber uses the WI ePDMP until they Accept or Deny the request.

Prescriber Medical Coordinator Management

The prescriber has a Medical Coordinator Management page that summarizes their Medical Coordinators.

- Displays the current status of all Medical Coordinators requests.
- Shows the date that an approved Medical Coordinator last viewed their metrics.
- The prescriber can remove a Medical Coordinator’s access at any time.
Medical Coordinator Weekly Status Email

In addition to the Status column in the Medical Coordinator Prescriber List, the Medical Coordinator will receive a weekly email with updates to the status about the prescriber requests.

1. The weekly email will list the prescribers who have:
   a. A status of Pending
   b. Denied the request in the last week

   There will also be a count of DEA numbers that could not be linked to a WI ePDMP account

2. The email will be generated until there are no longer any DEA numbers with a Request Status of Pending or until the Medical Coordinator removes the Pending prescriber request from their Prescriber List.

Section 6: Creating and Managing a Prescriber List

There are two different methods for creating a Prescriber List in the WI ePDMP. Both methods will require the DEA number for the prescriber(s). If a prescriber has more than one DEA number, only provide the primary DEA number. The WI ePDMP will automatically include dispensing for related DEA numbers for the prescriber.

Uploading the Initial Prescriber List

To upload a list of DEA numbers, create an Excel file that lists all DEA numbers in one column.

1. Create an Excel file of DEA numbers. No other data should be included.
2. Save the file as a CSV (Comma delimited) (*.csv)

3. Log into the WI ePDMP, select Prescriber List from the toolbar then select Upload Prescriber List and Choose file to add.

4. **Subsequent uploads will overwrite the existing Prescriber List; therefore, anytime the upload function is used to update the Prescriber List, a comprehensive list including both existing and new DEA numbers must be uploaded.** Maintain the original upload or use the export feature for a complete list of the existing Prescriber List.

5. Before the upload is complete an initial summary will be displayed of the DEA Numbers. Select Cancel if corrections need to be made to the .csv.

Select Upload to add the DEA numbers, which will notify prescribers of the Medical Coordinator request.
6. A final summary will be displayed of the DEA Numbers that have been provided in the .csv. The summary indicates which DEA numbers are not associated with a WI ePDMP account.

### Prescriber DEA Numbers

**Valid**

XX0000001  XX0000002

**Invalid DEA Numbers that will not be uploaded**

1234

**Valid Upload - No PDMP Account**

XX0000001

**Added**

XX0000002

- Prescriber DEA numbers have been uploaded.

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**Uploading Updates to an Existing Prescriber List**

Subsequent uploads will overwrite the existing Prescriber List; therefore, anytime the upload function is used to update the Prescriber List, a comprehensive .csv file must include the existing Prescriber List along with any new DEA numbers. When using the upload feature to modify an existing Prescriber List, only add or remove numbers from the initial upload file.

1. If a DEA number listed in the current WI ePDMP Prescriber List is not on the subsequent upload, that prescriber will be removed from the Prescriber List.

2. If the upload contains a DEA number not currently listed in the WI ePDMP Prescriber List, the prescriber will be added to the list at upload and an email request sent if the prescriber has a WI ePDMP account.

3. **The upload must include the DEA numbers for prescribers who are currently listed in the WI ePDMP Prescriber List and should remain listed.** Including existing DEA numbers in the upload will not impact the current status of the Medical Coordinator permissions to view that prescriber’s metrics nor will it generate any email communication regarding Medical Coordinator permissions to the existing prescribers currently associated with the Medical Coordinator.

4. The summary message displayed after uploading a prescriber list will confirm the DEA numbers that have been removed from the existing Prescriber List and those DEA numbers that remain from the previous Prescriber List.
Manually Adding Prescribers to Prescriber List

To manually add a new individual prescriber to the Prescriber List, use Add Prescriber located at the bottom of the Prescriber List.

1. Select Add Prescriber by DEA Number

2. Enter DEA Number

3. Select Check DEA Number

4. Review the Prescriber Information

5. If the DEA number is not associated with WI ePDMP user account a message will be displayed.

Removing Prescribers from the Prescriber List

There are two options for removing prescribers from the Prescriber List, manual selection or by uploading a new prescriber list.

1. To manually remove an individual prescriber, select Remove.
2. To manually remove multiple prescribers, use the check box or Select All to select the prescribers.

3. Then click Remove Selected Prescriber(s).

4. To use the upload feature to remove prescribers from the Prescriber List, upload a new prescriber list that excludes the prescribers that should be removed.

5. Once the .csv file has been uploaded, a summary will be displayed of which DEA numbers were deleted and which DEA numbers were from the existing Prescriber List.
Section 7: Creating a Medical Coordinator Assistant

A Medical Coordinator may create a Medical Coordinator Assistant by selecting Assistant Management from the toolbar.

A Medical Coordinator Assistant has permission to upload the DEA list, view the status of prescriber requests, and add/remove DEA numbers.

The assistant role does not have access to Prescribing Practice Metrics.
Section 8: Frequently Asked Questions

Who can be established as a Medical Coordinator in the WI ePDMP?

A Medical Coordinator for purposes of accessing the WI ePDMP is defined by Wis. Stat.§ 961.385(2)(cm)2. It allows the WI ePDMP to release non-patient-identifiable information to a person who:

1) Medically coordinates, directs, or supervises a practitioner;
2) Establishes standard operating procedures for a practitioner;
3) Evaluates the job performance of a practitioner; OR
4) Performs quality assessment and improvement activities, including outcomes evaluation or developing clinical guidelines.

Why can’t a Medical Coordinator access patient identifiable information?

Wis. Stat.§ 961.385(2)(cm)2 specifies that personally identifiable information cannot be disclosed to a Medical Coordinator.

How can the WI ePDMP Medical Coordinator role be used by the employer?

The WI ePDMP is a compilation of data submitted to it by dispensers, and information in the PDMP should correspond to original records kept by prescribers and dispensers. Prescribing Practice Metrics should not be used in isolation. Therefore, Medical Coordinators should use the Prescribing Practice Metrics as one tool to supplement the employer outreach and initiatives related to usage of the WI ePDMP or prescribing of controlled substances.

Why does the Prescriber have to accept the Medical Coordinator’s access?

The WI ePDMP is a statewide database that does not contain an indication of which prescriber’s dispensings are attributed to which specific health system. Requiring prescriber approval prevents the Medical Coordinator users from viewing metrics for prescribers they do not direct or supervise and therefore makes the employer’s use of the Medical Coordinator role more transparent to the prescriber.

How do I send a new request to a prescriber who denied my first request?

If a prescriber has a status of Denied, remove them from your Prescriber List by clicking Remove, then add them back to your Prescriber List using Add Prescriber by DEA Number. This will add them back to your Prescriber List with a status of Pending and generate a new request to the prescriber to establish you as their Medical Coordinator.

What does it mean if a prescriber’s status is Not Registered?

This means that the DEA number entered on your Prescriber List could not be associated with an active WI ePDMP account. For prescribers with this status, first confirm there are no errors in the DEA number entered. If the DEA number is accurate, check with the prescriber to determine if a different DEA number was used to register for the WI ePDMP, if they are using an alternative workflow for complying with the requirements to use the WI ePDMP or if a WI ePDMP account as created for the prescriber but the prescriber never completed the step to activate the account.
What if my prescriber has multiple DEA numbers?
You will need to provide the DEA number associated with the prescriber’s WI ePDMP account to initiate the request to be their Medical Coordinator. The dispensing data in the WI ePDMP is determined by the state where the dispensing occurred and the prescriber DEA number provided by the pharmacy, not the location of the DEA number. The Prescribing Practice Metrics data will combine all DEA numbers associated with the prescriber based on the Wisconsin dispensings.

Why don’t any of my prescribers have an estimated PDMP usage of 100% if it is a requirement to use the WI ePDMP?
PDMP Usage is a basic calculation for the past 12 months of the number of the prescriber’s controlled substance dispensings divided by the number of PDMP patient queries, including queries completed by a delegate of the prescriber. It does not take into consideration delegate queries associated with a different prescriber or other alternative workflows. Prescription orders for a 3-day supply or less are excluded from the PDMP usage calculation, but the calculation cannot capture all exceptions of WI ePDMP usage (defined by Wis. Stat 961.385(2)(cs)2) nor scenarios such as multiple dispensings, refills or alternative workflows for WI ePDMP patient queries.

The Concerning Patient History Alerts don’t seem consistent with the opioid prescribing of my prescribers. What is the explanation for that?
Law Enforcement Alert and Concerning Patient History Alerts summarize patient level information to assist prescribers with an overview of their controlled substance patient population. Concerning Patient History Alerts are data driven alerts that reflect all dispensing to the patient and are not specific/limited to the individual prescriber’s dispensings to the patient.

Can I retrieve Prescribing Practice Metrics for different time period?
At this time Prescribing Practice Metrics can only be provided to prescribers and medical coordinators based on the rolling 100 day time period.