Training Guide for Colorado Practitioners and Pharmacists

Colorado State Board of Pharmacy
Prescription Drug Monitoring Program

April 2016
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1 Document Overview

Purpose and Contents

The RxSentry® Training Guide for Colorado Practitioners and Pharmacists serves as a step-by-step training guide for prescribers and dispensers using RxSentry for querying purposes. It includes such topics as:

- Creating query requests
- Viewing query request status
- Generating reports

RxSentry Update

In December 2014, the RxSentry system underwent an extensive update designed to improve the user experience. The new user interface is more intuitive and visually pleasing, and also provides some new functionality.

Here are the most significant new features:

- Retrieve User Name – this function allows you to retrieve a forgotten user name.
- Retrieve Password – this function allows you to retrieve a forgotten password.
- Query Tab – this tab provides direct links to every query you are allowed to access.
- Prescriber History Query – this report allows you to view an audit trail of all queries performed using your user ID for a specified timeframe. If you are a master account holder, it also allows you to view an audit trail of all queries performed by your delegates on your behalf.
- Report Queue Tab – this tab (previously the View Query Status link) allows you to view all of your available reports quickly.
- User Management Tab – this tab allows you to update your user profile information and change your password, as needed. If you are a master account holder, you can also manage your delegate accounts from this tab.
- Help Tab – this tab provides resources that may answer any questions you have about using RxSentry, such as creating a query. These resources include online help and an electronic version of the Training Guide for Colorado Practitioners and Pharmacists.
- Quick Links Tab – this tab provides links to websites that you may frequently access, such as the Colorado State Board of Pharmacy website.

As you will see, this guide has been restructured to correspond with the new interface. The table below provides a quick reference for existing topics in this guide that have been moved or changed:

<table>
<thead>
<tr>
<th>If you are looking for...</th>
<th>It is now called...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Practitioner/Pharmacist Query</td>
<td>The Practitioner/Pharmacist Query function and the corresponding topic in this guide are now called Recipient Query.</td>
</tr>
<tr>
<td>If you are looking for...</td>
<td>It is now called...</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Prescriber Search by DEA</td>
<td>The Prescriber Search by DEA function and the corresponding topic in this guide are now called Prescriber DEA Query.</td>
</tr>
<tr>
<td>View Query Status</td>
<td>The View Query Status function and the corresponding topic in this guide are now called Report Queue.</td>
</tr>
</tbody>
</table>

Table 1 – New/changed topics
2 System Overview

RxSentry is the prescription drug monitoring program (PDMP) used by the Colorado State Board of Pharmacy (Board) to collect and store prescribing and dispensing data for controlled substances in Schedules II, III, IV, and V, and any other drugs specified by Colorado law as amended, dispensed in the State of Colorado or for patients residing in Colorado. The PDMP was originally authorized in 2005 by Colorado Revised Statutes (C.R.S.) and was reauthorized in 2011.

The data collected will be used in the prevention of diversion, abuse, and misuse of controlled substances through the provision of education, early intervention, and enforcement of existing laws that govern the use of controlled substances.
3 Accessing RxSentry

About This Chapter

This chapter contains the steps new users must follow to request access to RxSentry and existing users must follow to access RxSentry. It also provides the steps you must follow to log in to and out of the system and to retrieve a forgotten user name or password.

Establish Access to RxSentry

This topic contains the steps new users must follow to request access to RxSentry and existing users must follow to establish new system passwords and access RxSentry.

New Users

The Colorado State Board of Pharmacy PDMP grants system access accounts to practitioners and pharmacists, and their delegates, so that they may look up, view, and print controlled substance dispensing information on their specific patients directly via user name and password.

Practitioners and pharmacists licensed in Colorado may request a user account to access information in the system. Access is granted to individuals only—not to clinics, hospitals, pharmacies, or any other healthcare facility.

Notes:

- This section applies to practitioners, pharmacists, and delegates who were not registered with the CO PDMP prior to August 2012.
- The steps included in this section are performed only once—the first time you log in to RxSentry. Thereafter, follow the steps provided in the Log In to RxSentry topic.

Perform the following steps to request an account:

1. Open an Internet browser window and type the following URL in the address bar: www.hidesigns.com/copdmp.

   Note: RxSentry is compatible with most Internet browsers including Internet Explorer, Mozilla Firefox, and Apple Safari.

2. Click the Practitioner/Pharmacist link located on the left menu.
A window similar to the following is displayed:

3. Click the **Terms and Conditions** link to open and read.

4. After reading the terms and conditions, click the **Registration** link. A login window is displayed.

5. Type `newacct` in the **User Name** field.

6. Type `welcome` in the **Password** field.

7. Click **OK**.

The **Colorado PDMP Provider Account Registration Form** is displayed:

```
Colorado PDMP Provider Account Registration Form

* LAST Name: ..................................................  * FIRST Name: ..................................................  
* Date of Birth (MM/DD/YYYY): ..................................  * Last 4 Digits of SSN: .....................................  
Business Name (if applicable): ..........................................................  
* Street Address: ..........................................................  
* City: ..........................................................  * State: Select a state .............................................  * Zip Code: ..................................................  
* State License Prefix: Select type ........................................  
* State License Number (without prefix or proceeding zeros - ex. 12345678): ..................................  * License State Code: Select a state ........................................  
* Phone: ..........................................................  * Fax: ..........................................................  
* DEA Number (for prescribers only): ..................................  * Email: ..........................................................  
* Security Question: Select a question ..................................  * Security Answer: ..................................................  

Colorado PDMP Provider Account Liability Statement

In order to continue, you must attest that you have read and understand the message below.

I state under penalty of perjury in the second degree, as defined in 18-8-503, CRS, that I am the person identified above, and I understand that under Colorado law, providing false information is grounds for denial, suspension or revocation of a professional or occupational license or certificate.

I acknowledge and verify that I will only access information from the PDMP database for a patient I am currently treating, dispensing for, or providing clinical services to. I understand that if I release, obtain or attempt to obtain information from the Electronic Prescription Monitoring Program in violation of CRS Title 12, Article 42.5, Part 4, I may, at minimum, be fined for each violation.

By clicking ‘Accept and Submit’, I hereby agree to follow the security and password policies of the Electronic Prescription Monitoring Program. I agree to not disclose or misrepresent any data or protected health information to any unauthorized person or party. I understand and agree that I am responsible for all use of my user name and password. I agree that I will not share my account information, login name, or password with anyone, even with co-worker or with others who are authorized users of the program.

Accept & Submit
```
8. Complete the fields on this form, noting the following:
   ▪ Required fields are indicated with an asterisk (*).
   ▪ If you are applying for a delegate account, you must select DEL in the State License Prefix field.
9. Click Accept & Submit.

   If information is incomplete or missing, a message is displayed indicating which fields must be corrected before your account registration form can be submitted.

   If all information has been properly supplied, a completed account registration form is displayed, along with a prompt to print the form. Print the form if desired.

Your information will be compared and validated against the information the Colorado PDMP staff has on file for you. If your information is validated, your account will be automatically approved.

Once you are approved for an account, you will be notified via two separate e-mails. The first e-mail will contain your approval notification and user name. The second e-mail will contain your temporary password, your personal identification number (PIN) that you will use to identify yourself if you need assistance from the HID Help Desk, and the steps to follow to log in to the system. You will be required to change the temporary password immediately when you first attempt to access the system.

If your information cannot be validated, you will be denied access to the system. If you have been denied access to the system, please view the PDMP Practitioner and Pharmacist Discrepancy form available online at www.hidesigns.com/copdmp/practitioner-pharmacist/discrepancy-form.html for instructions on how to correct any discrepancy that may be interfering with your ability to create a CO PDMP account.

Notes:

   ▪ Delegate accounts – once your account is approved, a master account holder must activate your account before you can query the PDMP database.
   ▪ Master accounts – instructions for linking delegate accounts to your account are provided in the Delegate Accounts topic in this document.
Existing Users

Notes:
- This section applies only to practitioners and pharmacists who were authorized to access the CO PDMP prior to August 2012.
- The steps included in this section are performed only once—the first time you log in to RxSentry. Thereafter, follow the steps provided in the Log in to RxSentry topic.

If you are currently registered with the CO PDMP, you will receive an e-mail with a temporary password. You will need to establish a permanent password prior to accessing RxSentry.

Perform the following steps to log in to RxSentry and establish your new password:

1. Open an Internet browser window and type the following URL in the address bar: www.hidesigns.com/copdmp.
   - Note: RxSentry is compatible with most Internet browsers including Internet Explorer, Mozilla Firefox, and Apple Safari.

2. Click the Access Query Site Directly link located on the left menu:

   A login window is displayed.

3. Type your current CO PDMP user name in the User Name field.

4. Type the temporary password in the Password field.

5. Click OK.
   - Note: At this point, you will be required to change your temporary password.
A window similar to the following is displayed:

![Change Password](image)

6. Type your temporary password in the **Current Password** field.
7. Type your new password in the **New Password** field, using the information displayed on this window as a password selection guideline.
8. Type your new password again in the **Confirm New Password** field.
9. Click **Submit**.
   
   If the new password is accepted, a message is displayed indicating that your password was accepted and that you are required to log in using your new password.
   
   If the new password is *not* accepted, the message indicates that another password must be selected.
10. Once your password has been accepted, click any function, such as **Query**.
    
    A login window is displayed.
11. Type your user name in the **User Name** field.
12. Type your password in the **Password** field.
13. Click **OK**.
    
    The RxSentry home page is displayed.
Log In to RxSentry

Note: If you have forgotten your RxSentry user name or password, see one of the following topics:

- Retrieve User Name
- Retrieve Password

After three (3) unsuccessful login attempts, your account will be locked for 30 minutes.

Perform the following steps to log in to RxSentry:

1. Open an Internet browser window and type the following URL in the address bar: www.hidesigns.com/copdmp.

2. Click the Access Query Site Directly link located on the left menu:

![Access Query Site Directly](image)

A login window is displayed.

3. Type your user name in the User Name field.

4. Type your password in the Password field.

5. Click OK.

Note: If you are an existing CO PDMP user and this is your first time logging in to the updated system, the Update User Profile window will display. Enter any missing required information (required fields are indicated with an asterisk [*]) and then click Update.

The RxSentry query site home page is displayed as shown on the following page.
The main menu, located at the top of the page, contains the RxSentry functions. If available, a sub-menu is displayed on the left side of the window. For example, in the screenshot above, the user clicked Query from the main menu, and the Query sub-menu was displayed on the left.

Retrieve User Name

If you have forgotten your RxSentry user name, perform the following steps to retrieve it:

1. Open an Internet browser window and type the following URL in the address bar: www.hidesigns.com/copdmp.

2. Click the Practitioner/Pharmacist link located on the left menu.

   A window similar to the following is displayed:

   ![Practitioner/Pharmacist Menu](image)

3. Click Query Site Login.
A window similar to the following is displayed:

4. **Click Access System.**

A window similar to the following is displayed:

5. **Click Retrieve User Name.**
A window similar to the following is displayed:

6. Type the e-mail address associated with your account in the **Enter Email Address for Account** field.

7. Type your date of birth in the **Enter Date of Birth for Account** field.

8. Click **Submit**.
   
   A message providing your user name is displayed.

**Retrieve Password**

If you have forgotten your RxSentry password, perform the following steps to retrieve it:

1. Open an Internet browser window and type the following URL in the address bar:  
   www.hidesigns.com/copdmp.

2. Click the **Practitioner/Pharmacist** link located on the left menu.
   
   A window similar to the following is displayed:

3. Click **Query Site Login**.
A window similar to the following is displayed:

4. Click **Access System**.

A window similar to the following is displayed:

5. **Click Retrieve Password**.
A window similar to the following is displayed:

6. Type your user name in the **Enter User Name for Account** field.
7. Type your date of birth in the **Enter Date of Birth for Account** field.
8. Click **Submit**.

   A window similar to the following is displayed, prompting you to answer the security question established when you created your account:

9. Type the answer to your security question in the **Answer** field.
10. Click **Submit**.

   **Note:** If you have forgotten the e-mail address associated with your account or the answer to your security question, contact the HID Help Desk.

   A message displays indicating that an e-mail containing a temporary password was sent to the e-mail address associated with your user name.

   You will receive an e-mail from **copdmp-info@hidinc.com** (**COPDMINFO**) containing your temporary password.

11. Once you have received your temporary password, and you know your user name, click **Login**.

    A login window is displayed.

12. Enter your user name and temporary password, and then click **OK**.

   **Note:** At this point, you will be required to change your temporary password.
A window similar to the following is displayed:

![Change Password Window]

13. Type your temporary password in the **Current Password** field.

14. Type your new password in the **New Password** field, using the information displayed in this window as a password selection guideline.

15. Type your new password again in the **Confirm New Password** field.

16. Click **Submit**.

   - If the new password is accepted, a message is displayed indicating that your password was accepted and that you are required to log in using your new password.
   - If the new password is *not* accepted, the message indicates that another password must be selected.

17. Once your password has been accepted, click any function, such as **Query**.

   A login window is displayed.

18. Type your user name in the **User Name** field.

19. Type your password in the **Password** field.

20. Click **OK**.

   The RxSentry home page is displayed.
Session Timeouts

Session timeouts occur after fifteen (15) minutes of system inactivity, and the following message is displayed:

Perform one of the following actions:

If you wish to log in with the same user name, type your password in the User Password field, and then click Submit;

OR

If you wish to log in with a different user name, close ALL open Internet browser windows, and then log in again. You will be prompted to enter both your user name and password.

Password Expirations

RxSentry passwords expire every six (6) months. When the expiration date is reached, a message will display indicating that you must change your password. Once you click OK on this message window, the following window will display:
Perform the following steps:

1. Type your current password in the **Current Password** field.

2. Type your new password in the **New Password** field, using the information displayed on this window as a password selection guideline.

3. Type your new password again in the **Confirm New Password** field.

4. Click **Submit**.

   - If the new password is accepted, a message is displayed indicating that your password was accepted and that you are required to log in using your new password.
   - If the new password is *not* accepted, the message indicates that another password must be selected.

5. Once your password has been accepted, click any function, such as **Query**.

   A login window is displayed.

6. Type your user name in the **User Name** field.

7. Type your password in the **Password** field.

8. Click **OK**.

   The RxSentry home page is displayed.

**Log Out of RxSentry**

To ensure your login credentials (user name and password) are not used by an unauthorized individual, it is important that you log out of the system when you have completed your session. To do so, click **Log Out** from the menu, and then close your Internet browser.

**Note:** Clicking **Log Out** closes your session and allows you to re-enter the system by simply supplying your password. If you do not plan to use the system for a period of time, click **Log Out** and then **close ALL open Internet browser windows** to prevent another user from inadvertently attempting to access your session.
4 RxSentry Queries

About This Chapter

This chapter explains how to create queries that can be used to report information about recipient usage of controlled substances and how to create queries to report information about your prescribing history.

The following types of queries are available:

- **Recipient Query** – used by practitioners and pharmacists to create queries regarding recipient usage of controlled substances
- **Prescriber History Query** – used by practitioners to view a history of all queries performed using their user ID, as well as all queries performed by their delegates, if applicable
- **Prescriber DEA Query** – used by practitioners to view a history of all dispensed prescriptions attributed to their DEA number
- **Multiple State Query** – used by practitioners and pharmacists to create queries regarding recipient usage of controlled substances in multiple states

Recipient Query

This function is used by practitioners and pharmacists, and their delegates, to create queries that can be used to report information about recipient usage of controlled substances.

Perform the following steps to create a query:

1. **Log in to RxSentry.**

   A window similar to the following is displayed:
   
   ![Recipient Query Window](image)

   2. **Click Recipient Query.**
A window similar to the following is displayed:

![Recipient Query Window](image)

You may query any recipient who is a current patient, but before you can view the results of the query, you must authenticate the query by indicating that the query is for a valid reason and that you have the potential to provide a service to the recipient who is being queried.

**Notes:**

- Without selecting the check box indicating that you understand and agree to the terms and conditions, you will not be able to access the Recipient Query window.
- You will be required to accept the terms and conditions each time you start a new session in RxSentry; however, you will not be required to accept the terms and conditions each time you create a query in that session.

3. Select the check box indicating that you accept the terms and conditions. A window similar to the following is displayed:
4. Complete the information on the request window, using the field descriptions in the following table as a guideline. Note the required fields, which are marked with an asterisk (*); if these fields are not populated, a message displays that includes a list of fields that must be populated before the query can be submitted.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td><em>(Required)</em> Type the recipient’s last name. You may also search for a specific recipient by using partial text, for example, type Smi to display a list of recipients containing “Smi” in the first three letters of their last name.</td>
</tr>
<tr>
<td>First Name</td>
<td><em>(Required)</em> Type the recipient’s first name. You may also search for a specific recipient by using partial text, for example, type Tho to display a list of recipients containing “Tho” in the first three letters of their first name.</td>
</tr>
</tbody>
</table>
| Search Method    | Select one of the following search methods:  
- **Fastest: Last Name Equals, First Name Begins** – Allows you to search by a recipient’s complete last name and partial first name. The more information you can provide, the more specific your search results will be.  
- **Begins With** – Allows you to search by the first few letters of the recipient’s last and first names.  
- **Sounds Like** – Allows you to search by a name, and the system will find names that sound similar to the one you entered.  
If you are unsure of the recipient’s first and last name, or are unsure of the spelling, use the **Begins With** or **Sounds Like** option. |
| Date of Birth    | Type the recipient’s date of birth using the mm/dd/yyyy format. **Note:** This field is no longer required. |
| Within           | Used in conjunction with the **Date of Birth** field to specify a time range within which to match the date of birth. |
| Gender           | Click the down arrow and select the gender of the recipient(s) to include in your search. |
| Dispensed Start Date | *(Required)* Use this field to enter a specific start date for the dispensing timeframe, for example, 12/01/2014;  
Or  
You may click the calendar icon (日にち) and select a specific start date from the calendar. |
| Dispensed End Date | *(Required)* Use this field to enter a specific end date for the dispensing timeframe, for example, 12/31/2014;  
Or  
You may click the calendar icon (日にち) and select a specific end date from the calendar.  
**Note:** The **Dispensed End Date** cannot be greater than 14 days ago. |
Field Name | Usage
---|---
Master Accounts | (Required) Click the down arrow to select the master account holder on whose behalf you are performing the query.

**Table 2 – Recipient Query Window Field Descriptions**

5. Once all criteria have been entered or selected, click **Next**. Your search results are displayed similar to the following:

6. From the **Search Results** section of this window, click the desired recipient’s name. To select specific recipients from the list:
   - Select a single value by clicking the value.
   - Select multiple values, listed consecutively, by clicking the first value, holding down the **[Shift]** key, and then clicking the last value.
   - Select multiple values, not listed consecutively, by holding down the **[Ctrl]** key while clicking each value.

7. Select one of the following sort options:
   - **By Recipient by Date**: this option sorts first by recipients (patient IDs, in numerical order) and then by prescription dispense date (newest to oldest)
   - **By Date Only**: this option sorts by prescription dispense date (newest to oldest)

8. Click **Submit**.

Your report results are displayed as shown on the following page.
Notes:

- Your search criteria and the recipient names you selected are located above your report. You may click the down arrow in the **Recipients** field to view a list of the patients you chose to include in your report.
- The **Payment Method** column identifies the type of payment used for the prescription. The classification codes are as follows:
  - 01 Private Pay (Cash, Charge, Credit Card)
  - 02 Medicaid
  - 03 Medicare
  - 04 Commercial Insurance
  - 05 Military Installations and VA
  - 06 Workers’ Compensation
  - 07 Indian Nations
  - 99 Other
- The **MED Daily** column identifies the morphine equivalent dosage for each opioid-containing prescription. The **MED Summary** section, located at the bottom of the report, displays the maximum occurrence of MED sustained for any three consecutive days for each recipient in the report. This value is calculated based on prescriptions dispensed during the date range requested.

9. From this window, you may perform the following functions:

   a) Click any column header to sort your results by the information contained in that column.

   b) Click **Generate PDF** to generate a PDF version of your report, or click **Generate CSV** to generate a comma separated values version of your report to display in a spreadsheet.

   Your report will begin to process, and a window similar to the following is displayed:

   "Query 533 has been created. Go to Report Queue in the navigation menu to retrieve report when query finishes running."
Click the **Report Queue** link to navigate to the Report Queue and view your report. Continue to the **Report Queue** topic in this document for more information.

c) Click **Map Results** to view a graphical depiction of your results.

A window similar to the following is displayed:

![Map](image)

If desired, click the direction arrows in the top left corner of this window to scroll to different sections of the map.

You may also expand or reduce the detail included in the map by clicking the plus (+) or minus (−) symbols. When the map is expanded, the following icons are visible:

- **Red pushpin** – Represents the recipient’s address; clicking a pushpin displays the total number of prescriptions for the recipient
- **Doctor bag** – Represents the physician’s address; clicking a doctor bag displays the physician’s name and number of prescriptions written for the recipient
- **Mortar and pestle** – Represents the pharmacy’s address; clicking a mortar and pestle displays the pharmacy’s name and phone number
Prescriber History Query

This function allows you to view an audit trail of all queries performed using your user ID for a specified timeframe. If you are a master account holder, you may also use this function to view an audit trail of all the queries performed by your delegates.

Perform the following steps to view this report:

1. **Log in to RxSentry**.

   A window similar to the following is displayed:

   ![Prescriber History Query Window](image)

   **Notes:**
   - Without selecting the check box indicating that you understand and agree to the terms and conditions, you will not be able to access the Prescriber History Query window.
   - You will be required to accept the terms and conditions each time you start a new session in RxSentry; however, you will not be required to accept the terms and conditions each time you create a query in that session.
3. Select the check box indicating that you accept the terms and conditions. The Prescriber History Query window is displayed similar to the following:

![Prescriber History Query](image)

4. If you are master account holder, your user ID and that of any delegates linked to your account are displayed in the User ID field. All user IDs are selected by default. Click to select the user(s) whose audit information you wish to view.

If you are a delegate account holder, your user ID is the only available option in the User ID field. Continue to step 5.

5. The Audit Start Date and Audit End Date fields are automatically populated to generate your search history for one year based on the current date. If you are using this date to generate your report, you may continue to the next step;

Or

You may change the Audit Start Date and Audit End Date by typing the desired dates or by clicking the calendar icon and selecting a date from the calendar.

6. Click Submit.

Your report results are displayed as shown on the following page.
7. From this window, you may click the **details** link next to a query to view the details of that query.

### Prescriber DEA Query

This function allows you to use your prescriber DEA number to view your prescribing history for a specified timeframe.

Perform the following steps to view your prescribing history:

1. **Log in to RxSentry.**
   
   A window similar to the following is displayed:

   ![Prescriber DEA Query Window](image)

2. **Click Prescriber DEA Query.**
A window similar to the following is displayed:

You must authenticate the query by indicating the query is for a valid reason and that you are authorized to submit the query.

Notes:

- Without selecting the check box indicating that you understand and agree to the terms and conditions, you will not be able to access the Prescriber DEA Query window.
- You will be required to accept the terms and conditions each time you start a new session in RxSentry; however, you will not be required to accept the terms and conditions each time you create a query in that session.

3. Select the check box indicating that you accept the terms and conditions.

A window similar to the following is displayed:

![Prescriber DEA Query](image)

4. The **Dispensed Start Date** and **Dispensed End Date** fields are automatically populated to generate your prescribing history for one year based on the current date. If you are using this date to generate your report, you may continue to the next step;

Or

You may change the **Dispensed Start Date** and **Dispensed End Date** by typing the desired dates or by clicking the calendar icon (📅) and selecting a date from the calendar.
5. Click **Submit**.

Your report results are displayed similar to the following:

![Prescriber DEA Query]

*Note:* The **MED Daily** column identifies the morphine equivalent dosage for each opioid-containing prescription. The **MED Summary** section, located at the bottom of the report, displays the maximum occurrence of MED sustained for any three consecutive days for each recipient in the report. This value is calculated based on prescriptions dispensed during the date range requested.

6. From this window, you may perform the following tasks:

a) Click any column header to sort your results by the information contained in that column.

b) Click **Generate PDF** to generate a PDF version of your report, or click **Generate CSV** to generate a comma separated values version of your report to display in a spreadsheet.

Your report will begin to process, and a window similar to the following is displayed:

**Query 536 has been created. Go to Report Queue in the navigation menu to retrieve report when query finishes running.**

Click the **Report Queue** link to navigate to the Report Queue and view your report. Continue to the **Report Queue** topic in this document for more information.

c) Click **Map Results** to view a graphical depiction of your results.
A window similar to the following is displayed:

If desired, click the direction arrows in the top left corner of this window to scroll to different sections of the map.

You may also expand or reduce the detail included in the map by clicking the plus (+) or minus (−) symbols. When the map is expanded, the following elements are visible:

- **Red pushpin** – Represents the recipient’s address; clicking a pushpin displays the total number of prescriptions for the recipient
- **Doctor bag** – Represents the physician’s address; clicking a doctor bag displays the physician’s name and number of prescriptions written for the recipient
- **Mortar and pestle** – Represents the pharmacy’s address; clicking a mortar and pestle displays the pharmacy’s name and phone number
Multiple State Query

This function allows you to create reports regarding a recipient’s usage of controlled substances in multiple states.

**Note:** The Multiple State Query should not be used if the only data needed is from the home state.

Perform the following steps to create a Multiple State Query:

1. **Log in to RxSentry.**

   A window similar to the following is displayed:

   ![Multiple State Query Window](image)

2. **Click Multiple State Query.**

   A window similar to the following is displayed:

   ![Multiple State Query Instructions](image)

   You may query any recipient who is a current patient, but before you can view the results of the query, you must authenticate the query by indicating that the query is for a valid reason and that you have the potential to provide a service to the recipient who is being queried.

   **Notes:**

   - Without selecting the check box indicating that you understand and agree to the terms and conditions, you will not be able to access the Multiple Recipient Query window.
You will be required to accept the terms and conditions each time you start a new session in RxSentry; however, you will not be required to accept the terms and conditions each time you create a query in that session.

3. Select the check box indicating that you accept the terms and conditions.

The Multiple State Query window is displayed similar to the following:
4. Complete the information on the request window, using the field descriptions in the following table as a guideline. Note the required fields, which are marked with an asterisk (*); if these fields are not populated, a message displays that includes a list of fields that must be populated before the query can be submitted.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Information</td>
<td></td>
</tr>
<tr>
<td>Disclosing State(s)</td>
<td>(Required) Select the state(s) you wish to include in the query.</td>
</tr>
<tr>
<td>Notes:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The Multiple State Query should always include the home state.</td>
</tr>
<tr>
<td></td>
<td>• You may select multiple states by holding down the [Ctrl] key while clicking each value.</td>
</tr>
<tr>
<td>Requestor Role</td>
<td>This field is automatically populated with your RxSentry user role, for example, “Prescriber.”</td>
</tr>
<tr>
<td>Master Account</td>
<td>(Required) Click to select the master account holder on whose behalf you are performing the query.</td>
</tr>
<tr>
<td>Note:</td>
<td>This field is only displayed if you are a delegate account holder.</td>
</tr>
<tr>
<td>Recipient Information</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>(Required) Type the recipient’s exact last name. Unlike standard recipient queries, multiple state queries do not allow partial name matching. Note: Although multiple state queries do not support partial name matching, the system will return clustered results. For example, if you create a query for John Smith, DOB 01/01/1970, and there is a matching name that has been clustered with Johnny Smith, DOB 01/01/1970, both names will be returned in your report results.</td>
</tr>
<tr>
<td>First Name</td>
<td>(Required) Type the recipient’s exact first name. Unlike standard recipient queries, multiple state queries do not allow partial name matching.</td>
</tr>
<tr>
<td>Identifier</td>
<td>Type the recipient’s identification number (social security number, driver’s license number, etc.), if available.</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>(Required) Type the recipient’s date of birth using the mm/dd/yyyy format, or click the calendar icon to select a date from the calendar.</td>
</tr>
<tr>
<td>Gender</td>
<td>Click the down arrow and select the gender of the recipients to include in your search. If in doubt, select the “All” option.</td>
</tr>
<tr>
<td>Street Address</td>
<td>Type the recipient’s street address, if known, or leave this field blank to produce a wider range of results.</td>
</tr>
<tr>
<td>City</td>
<td>Type the recipient’s city, if known, or leave this field blank to produce a wider range of results.</td>
</tr>
<tr>
<td>Field Name</td>
<td>Usage</td>
</tr>
<tr>
<td>----------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>State</td>
<td>Click the down arrow and select the recipient’s state, or select “All States” to produce a wider range of results.</td>
</tr>
<tr>
<td>Zip Code</td>
<td>Narrow your search by entering a specific ZIP code, or leave this field blank to produce a wider range of results.</td>
</tr>
</tbody>
</table>

**Dispensed Timeframe**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dispensed Start Date</strong></td>
<td>(Required) Use this field to enter a specific start date for the dispensing timeframe, for example, 12/01/2014; Or You may click the calendar icon and select a specific start date from the calendar.</td>
</tr>
<tr>
<td><strong>Dispensed End Date</strong></td>
<td>(Required) Use this field to enter a specific end date for the dispensing timeframe, for example, 12/31/2014; Or You may click the calendar icon and select a specific end date from the calendar. <strong>Note:</strong> The Dispensed End Date cannot be greater than 14 days ago.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preset Timeframe Ranges</td>
<td>Use this field to select from a list of predefined timeframe ranges. If this function is used, any values supplied in the Dispensed Start Date and Dispensed End Date fields are ignored.</td>
</tr>
</tbody>
</table>

**Sorting Options**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sort by Date Only</td>
<td>Select this option to sort your report results by prescription dispensed date (newest to oldest).</td>
</tr>
<tr>
<td>Sort by Recipient by Date</td>
<td>Select this option to sort your report results first by recipient (patient IDs in numerical order) and then by prescription dispense date (newest to oldest).</td>
</tr>
<tr>
<td>Group results by state</td>
<td>Select this option to sort results by state, or leave blank to view all results in one table.</td>
</tr>
</tbody>
</table>

**Table 3 – Multiple State Query Window Field Descriptions**

5. Once all criteria have been entered or selected, click **Submit**.
A Recipient Report is displayed for each state you included in your query, similar to the following:

![Recipient Report](image)

**Note:** In the screenshot above, the Group results by state option was selected.

6. From this window, you may perform the following actions:
   a) Click the column headers that are hyperlinks (Date Dispensed, Prescriber, and Dispenser) to sort your results.
   b) Click Generate Report to generate a PDF version of your report. Your report will begin to process, and a window similar to the following is displayed:

   ![Query 537 has been created](image)

   Click the Report Queue link to navigate to the Report Queue and view your report. Continue to the Report Queue topic in this document for more information.

### Report Queue

The Report Queue allows you to check the status of a submitted query and view your reports once they have generated. The Query Status/Job Status column in the Query Request Status section of the Report Queue window displays one of the following query statuses:

- **Approved/Queued** – the parameters for the query have been correctly supplied, and the query is processing.
- **Approved/Done** – the parameters for the query have been correctly supplied, the query has processed, and it is available for viewing.

Perform the following steps to view the status of a query or several queries:

1. **Log in to RxSentry.**
2. **Click Report Queue.**
A window similar to the following is displayed:

<table>
<thead>
<tr>
<th>Query Number</th>
<th>Job Sequence ID</th>
<th>Request Date</th>
<th>Query Status/Job Status</th>
<th>Query Request Status</th>
<th>Report Description</th>
<th>Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>78 637</td>
<td></td>
<td>12/15/14</td>
<td>Approved/Done</td>
<td>Recipient Report</td>
<td>Multiple State</td>
<td>PDF</td>
</tr>
</tbody>
</table>

3. If the report is ready for viewing, the **Job Sequence ID** column contains a hyperlink for the report. Click the hyperlink for the desired report.

A window similar to the following is displayed:

4. Perform one of the following actions:
   - Select **Open with** and select the program you would like to use to open the report for viewing.
   - Select **Save File** to save the report to a specific location for viewing at a later time.

5. Click **OK**, or click **Cancel** to return to the previous window.

**Note:**
- Queries are available for viewing only by the user who submitted the query request.
- Queries are automatically removed from the report queue after 14 days.
- If you print the query, protect patient confidentiality by filing or destroying the document after it has been reviewed. Be sure to follow your facility’s protocols and policies regarding the destruction of confidential records.
View Patient Reports

This function allows you to access and view patient reports that have been automatically generated by RxSentry to alert you of recipients (patients) who have exceeded specific threshold levels. If a patient report is available to you, you will be notified via e-mail, and an alert message will display on the RxSentry home page.

Perform the following steps to view a patient report:

1. Log in to RxSentry.
2. Click Report Queue.
3. Click the hyperlink in the Job Sequence ID column in the Unsolicited Report Status section of the Report Queue window that corresponds to the report you wish to view. The report opens in Adobe Reader for you to review.
   
   Note: Recipient reports remain in the Report Queue for 30 days, after which time they are automatically removed.

4. If desired, click the Print icon ( ) to print the report.
5 User Management

About this Chapter

This chapter explains how to update your PDMP user profile and change your system password. It also describes the steps master account holders should follow to link and unlink delegate accounts.

Update User Profile

This function allows you to update the information the CO PDMP has on file for you, as needed.

Perform the following steps to update your PDMP profile:

1. **Log in to RxSentry.**
2. **Click User Management.**
   A window similar to the following is displayed:

   ![Update User Profile Window](image)

3. **Click Update User Profile.**
   The Update User Profile window is displayed as shown on the following page.
4. Update your information, as necessary, noting that required fields are marked with an asterisk (*).

5. Click **Update**.
   
   A message displays confirming that your record has been updated.
Change Password

This function allows you to change your RxSentry password, as needed.

Perform the following steps to change your password:

1. Log in to RxSentry.
2. Click User Management.
   A window similar to the following is displayed:

3. Click Change Password.
   A window similar to the following is displayed:

   ![Change Password Form]

   **Password requirements:**
   - 1 uppercase letter (e.g., A-Z)
   - 1 lowercase letter (e.g., a-z)
   - 1 digit (e.g., 0-9)
   - Must be at least 8 characters in length
   - Must not contain dictionary words or a name

   **Current Password:**
   **New Password:**
   **Confirm New Password:**

   **Submit**
4. Type your current password in the **Current Password** field.

5. Type your new password in the **New Password** field, using the information displayed on this window as a password selection guideline.

6. Type your new password again in the **Confirm New Password** field.

7. Click **Submit**. A message displays indicating that your password was accepted and that you are required to log in using your new password.

8. Click any function, such as **Query**.

   A login window is displayed.

9. Enter your user name and new password, and then click **OK**.

   The RxSentry home page is displayed.

---

**Delegate Accounts**

This section describes how to activate a delegate account by linking it to your master account and how to unlink delegate accounts that should no longer be associated with your master account.

**Note:** The Delegate Accounts function is only available to master account holders.

---

**Activating Delegate Accounts**

It is the responsibility of the master account holder to activate delegate accounts and associate them with the master account. These steps can only be completed by master account holders authorized to select and activate associated delegate accounts.

Perform the following steps to link a delegate account to your master account:

1. Log in to RxSentry.

2. Click **User Management**.

   A window similar to the following is displayed:
3. Click **Delegate Accounts**.

A window similar to the following is displayed:

![Delegate Accounts Window](image)

All delegate accounts currently linked to your master account are displayed in the **Currently Linked Delegate Accounts** section of this window.

Delegate accounts that have been approved and are awaiting master account holder association are displayed in the **Link Additional Delegate Accounts** section of this window. For each delegate account holder, the last/first name, user group, user ID, and agency are displayed.

4. Click to select the name of the delegate account holder you wish to link to your account.

**Notes:**

- You may select multiple delegate accounts by holding down the [Ctrl] key and clicking each user you wish to link.
- You may search for a delegate by entering a full or partial name in the **Last Name** and/or **First Name** fields, and then clicking **Search**. In the following example, the user entered partial text in the **First Name** field, and the system produced a list of all names beginning with those letters:

![Search Example](image)

To clear your search results and display all delegate accounts again, clear the **Last Name** and/or **First Name** fields, and then click **Search**.
5. Click **Link Account**. A window similar to the following is displayed, illustrating that the delegate account has been linked to your account:

![Image of Linked Delegate Accounts]

### Managing Delegate Accounts

It is the responsibility of the master account holder to manage delegate accounts associated with his or her master account, including activating delegate accounts, which is described in the previous section; monitoring the delegate account holder’s use of the CO PDMP database, which can be done using the *Prescriber History Query*; and removing any delegate accounts that should no longer be associated with the master account.

Perform the following steps to remove a delegate account from your master account:

1. **Log in to RxSentry**.
2. Click **User Management**.
   
   A window similar to the following is displayed:

![Image of User Management]

3. Click **Delegate Accounts**.
A window similar to the following is displayed:

4. All delegate accounts currently linked to your master account are displayed in the **Currently Linked Delegate Accounts** section of this window.

5. Click to select the name of the delegate account holder you wish to remove from your account.

**Notes:**
- You may select multiple delegate accounts by holding down the [Ctrl] key and clicking each user you wish to unlink.
- Once you unlink a delegate account, that user will no longer be able to query the PDMP database.

6. Click **Unlink Account**. A window similar to the following is displayed, illustrating that the delegate account holder has been removed from your account:
6 Assistance and Support

Technical Assistance

If you need additional help with any of the procedures outlined in this guide, you can:

Contact HID at copdmp-info@hidesigns.com;

Or

Call the HID Help Desk at 1-855-263-6403.

Technical assistance is available Monday through Friday (except for holidays) from 9:00 a.m. – 5:00 p.m. Mountain Time.

Administrative Assistance

If you have any non-technical questions regarding the Colorado PDMP, please contact:

Colorado State Board of Pharmacy
Prescription Drug Monitoring Program
1560 Broadway, Suite 1350
Denver, CO 80202

Phone: (303) 894-5957
Fax: (303) 894-7692
E-mail: pdmpingr@dora.state.co.us
7 Document Information

Version History

The Version History records the publication history of this document.

<table>
<thead>
<tr>
<th>Publication Date</th>
<th>Version Number</th>
<th>Comments</th>
</tr>
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<tr>
<td>08/03/2012</td>
<td>1.0</td>
<td>Initial publication</td>
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<tr>
<td>10/02/2012</td>
<td>1.1</td>
<td>Updated publication</td>
</tr>
<tr>
<td>05/28/2013</td>
<td>1.2</td>
<td>Updated publication</td>
</tr>
<tr>
<td>06/20/2014</td>
<td>1.3</td>
<td>Updated publication</td>
</tr>
<tr>
<td>12/19/2014</td>
<td>2.0</td>
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</tr>
<tr>
<td>01/22/2015</td>
<td>2.1</td>
<td>Updated publication</td>
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<tr>
<td>06/16/2015</td>
<td>2.2</td>
<td>Updated publication</td>
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<tr>
<td>07/08/2015</td>
<td>2.3</td>
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<tr>
<td>12/09/2015</td>
<td>2.4</td>
<td>Updated publication</td>
</tr>
<tr>
<td>04/27/2016</td>
<td>2.5</td>
<td>Updated publication</td>
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Table 4 – Version History

Change Log

The Change Log records the changes and enhancements included in each version.

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<thead>
<tr>
<th>Version Number</th>
<th>Chapter/Section</th>
<th>Change</th>
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<td>1.0</td>
<td>N/A</td>
<td>N/A</td>
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<tr>
<td>1.1</td>
<td>Chapter 3/Accessing RxSentry</td>
<td>Updated link names and screen shots to reflect language changes on the public website</td>
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<tr>
<td></td>
<td>Chapter 4/Practitioner/Pharmacist Query</td>
<td>• Added a note explaining that the query screen will display only once per login</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Updated screen shot of Practitioner/Pharmacist Query window</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Removed the following fields from Table 1: County Selection, Zipcode Selection, Address, and Preset TimeFrame Ranges</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Added a note that the Target DOB field is no longer required</td>
</tr>
<tr>
<td>Version Number</td>
<td>Chapter/Section</td>
<td>Change</td>
</tr>
<tr>
<td>----------------</td>
<td>----------------</td>
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</table>
|                | Chapter 4/Prescriber Search by DEA | • Added a note explaining that the query screen will display only once per login  
• Updated screen shot of Practitioner/Pharmacist Query window |
| 1.2            | Chapter 3/Log In to RxSentry | Added a note explaining that the user will be locked out of his/her account for 30 minutes after 3 unsuccessful login attempts |
|                | Chapter 4/Multiple State Query | Added new topic |
| 1.3            | Cover page | Removed state seal |
| 2.0            | Global | • Reorganized topics and updated screen shots and language to match the new RxSentry interface  
• Updated document to new HID template |
|                | Chapter 1/RxSentry Update | Added new topic |
|                | Chapter 3:  
• Retrieve User Name  
• Retrieve Password | Added new topics |
|                | Chapter 4/Prescriber History Query | Added new topic |
|                | Chapter 5:  
• Update User Profile  
• Change Password  
• Delegate Accounts | Added new topics |
| 2.1            | Chapter 4:  
• Recipient Query  
• Prescriber DEA Query | Added MED information to the report results |
<p>| 2.2            | Chapter 3/All Sections | Updated public website URL |
|                | Chapter 6/Technical Assistance | Updated HID help desk e-mail address |</p>
<table>
<thead>
<tr>
<th>Version Number</th>
<th>Chapter/Section</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.3</td>
<td>Chapter 4:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Recipient Query</td>
<td>• Updated screenshot of report results to show updated MED information</td>
</tr>
<tr>
<td></td>
<td>Prescriber DEA Query</td>
<td>• Updated MED Daily and MED Summary descriptions</td>
</tr>
<tr>
<td>2.4</td>
<td>Chapter 4:</td>
<td>• Updated the information regarding the liability statement to indicate that only current patients can be queried</td>
</tr>
<tr>
<td></td>
<td>Recipient Query</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Multiple State Query</td>
<td></td>
</tr>
<tr>
<td>2.5</td>
<td>Chapter 4:</td>
<td>• Changed the default search timeframe from the current date to one year from the current date</td>
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<tr>
<td></td>
<td>Prescriber History Query</td>
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</tr>
<tr>
<td></td>
<td>Prescriber DEA Query</td>
<td></td>
</tr>
</tbody>
</table>

Table 5 – Document Change Log

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