



Tennessee
Controlled Substance Monitoring Database
(CSMD)
Gateway Integration Welcome Packet



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What is the CSMD?

In accordance with the Controlled Substance Monitoring Act of 2002, a database to monitor the dispensing of Schedule II, III, IV & V controlled substances was established. Data collection began for all dispensers on December 1, 2006. The Prescription Safety Acts of 2012 and 2016 enhanced the monitoring capabilities of the database. Additional changes to the laws effecting the database were made by TN Together legislation. Tennessee has specific regulations regarding CSMD utilization. For registration information and instructions please visit www.tncsmd.com.

The CSMD is a web-based application that aids in the viewing of reported and dispensed controlled substance prescription information. The CSMD provides practitioners, pharmacists, and other authorized users the ability to review a patient's controlled substance history plus it includes Clinical Risk Indicators to assist in making informed prescribing and dispensing decisions.

What is PMP Gateway integration?

The Tennessee Department of Health has contracted with Bamboo Health to integrate CSMD information into approved Electronic Health Records (EHRs) and Pharmacy Management Systems (PMS) using Bamboo Health's PMP Gateway service.

PMP Gateway is a query system that provides access to the CSMD (as well as other states if that respective state approves) within a healthcare entity's (HCE) software system (e.g., electronic medical record, electronic health record, pharmacy management system). The integration eliminates the need for healthcare providers having to log in separately to the CSMD. Instead, the HCE software system automatically initiates a patient query and returns the patient's dispensed controlled substance prescription history plus Clinical Risk Indicators directly within the healthcare provider's workflow. The goal is to provide a process that minimizes workflow disruptions by providing seamless access to a patient's filled controlled substance prescription history plus Clinical Risk Indicators into the HCE software system.

PMP Gateway is a proprietary solution with an annual subscription fee based on the number of users within a HCE that integrate CSMD data within a healthcare provider's workflow. Healthcare entities in Tennessee legally authorized to prescribe, administer, or dispense controlled substance prescriptions are eligible for this integration solution.

It is important to note that not all HCE software system vendors are currently integrated. Your integration process and duration time to implement is dependent upon your software vendor.

Clinical Workflow

When determining where in the clinical workflow the HCE software system will query the CSMD data, it is important to note that there are key functional differences between the CSMD portal and PMP Gateway integration. The goal for integration is to provide the key data elements to healthcare providers in a streamlined workflow.

HCE integration removes the need for a user to:

1. Exit the HCE and go to www.tncsmd.com
2. Enter username and password
3. Navigate to a patient request
4. Enter a patient's first name, last name, and date of birth
5. Determine a date range to search
6. Select which states to query
7. Click 'search'

Instead, the PMP Gateway allows the HCE to perform an automated query to deliver a patient report directly within a healthcare provider's workflow. PMP Gateway integration is focused on delivering a streamlined workflow for healthcare providers to access a patient report of controlled substance prescriptions plus Clinical Risk Indicators.

It is important to note that PMP Gateway functionality **not included** in HCE integration (although these features will continue to be available in CSMD):

- Delegate access to conduct searches
- Partial name search
- Search history (including delegate search history)
- Easy Request patient search
- Practitioner Self Lookup
- User profile (Delegate/Supervisor management, Password reset)
- All interstate data sharing options
- Announcements
- Ability to view information when a user receives a notification

There may be cases where integrated healthcare providers will need to use the CSMD web portal here are some examples, but this is not an inclusive list:

- Receive a "disallowed message" from the PMP Gateway service
- Error messages that Gateway service is unavailable
- Data submitted through Gateway service does not return meaningful patient information
- Data needs to be submitted to other states
- Data submitted to other states fails to provide patient information or
- If healthcare provider needs to perform any of the functions listed above, then the user will have to complete the task via the CSMD web portal.

What is the integration implementation process?

Only duly authorized persons employed and who can make decisions on behalf of the HCE should complete the following.

1. Visit <https://connect.bamboohealth.com/> and create an account.
2. Follow the instructions presented by Customer Connect and complete all the required fields.
3. Customer Connect will present the Gateway End User License Agreement (EULA). Only an authorized signer, such as a business owner, should sign the EULA.
4. Customer Connect will present the TN CSMD Gateway Terms and Conditions and send the Terms

and Conditions to you via email from Dropbox Sign.

- a. On the Terms and Conditions, input the name of your organization exactly as you input it for Customer Connect and as it appears on your organization's business license.
 - b. Only an authorized signer, such as a business owner, should sign the Terms and Conditions.
 - c. The Terms and Conditions is reviewed by the TN CSMD Administrator for accuracy and approval. If not accepted, Bamboo Health will reach out to you for corrections.
5. Your integration request is submitted when Customer Connect presents confirmation that your application is complete.

Many HCE software system vendors have completed the integration development work to deliver PMP data within the clinical workflow. The process for an integrated HCE software system vendor is as follows:

1. Bamboo Health creates production credentials for your HCE.
 - a. This process can take up to 5 business days.
2. Once created, the CSMD Administrator will need to approve the request for credentials.
 - a. The contact listed on your integration request form will receive an automated email from Bamboo Health once approved.
 - To ensure emails from Bamboo Health do not go to junk or spam, please add @bamboohealth.com to your safe sender list.
3. Credentials will be sent to your HCE software system vendor or directly to you, based upon your vendor's preferred onboarding process.
 - a. Bamboo Health recommends you contact your HCE software system vendor to let them know you have submitted a request for integration under the CSMD statewide integration project.
 - b. You will work directly with your HCE software system vendor on the integration roll-out schedule. Bamboo Health is not directly involved with this process but can provide support if needed.

If your HCE software system vendor has not completed the integration development work to deliver PMP data within the clinical workflow, then follow these steps.

1. Your HCE software system vendor's information will be forwarded to a Bamboo Health Sales Engineer to prioritize the request and assist with the integration development process.
2. The Sales Engineer will provide your HCE software system vendor with integration API documentation.
3. The Sales Engineer will provide the necessary testing materials and provide technical support, as needed, to help facilitate your HCE software system vendor's development work.
4. Once Bamboo Health has approved the integration, your HCE software system vendor will set a production deployment date. Your vendor will follow-up when they are ready to deploy the integration to your facility.
 - ❖ Please note that depending upon the engagement level of the vendor or existing project backlog, this process can take up to several months.

Who will have access?

The following is a list of provider roles that may have access to CSMD via EHR integration.

- Physician (MD, DO, Podiatrist)
- Pharmacist
- Optometrist with prescriptive authority
- Medical Resident with prescriptive authority
- Dentist
- Physician Assistant with prescriptive authority
- Nurse Practitioner (Advanced Practice Registered Nurse) with prescriptive authority

Delegates, both unlicensed and licensed, are not able to access CSMD data via EHR integration. Instead, delegates will continue to access CSMD via the web portal.

Provider authorization

The CSMD requires that every patient query submitted to the PMP Gateway contain the requesting provider's first and last name, professional license number, DEA number (if applicable) and NPI number (if applicable). If the provider is not registered with the CSMD, they will not be allowed to retrieve any patient reports.

Post go-live Technical Support

If a user is experiencing an issue when attempting to access CSMD data via PMP Gateway, the user should **first** contact the HCE's IT helpdesk for assistance.

- ❖ Bamboo Health does not control any aspect of the HCE software system or the state PMP. Any issues related to these applications should be directed to your respective contact.

If it is determined that the PMP Gateway service is non-operational, [submit a support request form](#) where you will be redirected to Bamboo Health's Zendesk application. If this is the first time you are seeking assistance using this option an account will need to be created. When you click "Sign in" or "Submit a Ticket" it will ask you to sign in or underneath it says "New to Bamboo Health? Sign Up". Signing up initially only consist of your last name, first name, and email address. Once signed up you can add a phone number to your profile to be used to assist anytime you submit a ticket. Following this process will create a service ticket with the Bamboo Health helpdesk to troubleshoot the issue. Please allow up to 24 hours for Bamboo Health to acknowledge your issue.

When creating the ticket please include CSMD.Admin@tn.gov in the cc section of the ticket form if you wish Tennessee to be aware of your issue.

- ❖ If there is a disruption in the PMP Gateway integration service, practitioners should log in to the CSMD to request patient reports at www.tncsmd.com



Tennessee Controlled Substance Monitoring Database

665 Mainstream Drive, 2nd Floor

Nashville, Tennessee 37243

<https://www.tn.gov/health/csmdb>