

**Commonwealth of Massachusetts  
Department of Public Health**



# **MassPAT Bulk Patient Search**

**Advanced Functionality for Multi-Supervisor Selection**

- Overview of Tutorial purpose
- Bulk Search
  - Patient
  - **New Supervisor Search function**

## What is a Bulk Patient Search?

Unlike conducting single patient searches through the Rx Search request, a bulk patient search allows a delegate user to search the PMP system for multiple patients at one time. This can be done by manually entering the patient first name, last name, and date of birth into the bulk search fields and running the report. Or the delegate can upload a list of those patients into the system and run the report.

## The Problem

Delegates often have more than one supervisor. These delegates often select one supervisor and conduct a single bulk search that includes patients for multiple supervisors. When this happens one supervisor is credited with all the searches and the other supervisors appear to have no PMP utilization.

MGL Ch. 94C, sec. 24A requires a prescriber to utilize the PMP before prescribing a Schedule II-III narcotic or a benzodiazepine. ***When a delegate does not credit the correct supervisor for a patient search the prescriber appears to be in violation of the law.***

## The Fix

MassPAT has deployed advanced functionality on the bulk patient search page to allow the delegate to conduct a bulk patient search and easily attribute each patient search appropriately to the correct prescriber. This tutorial will help you conduct a bulk search that credits each supervisor appropriately.

## Navigate to the Bulk Patient Search Page

Menu > Rx Request > Bulk Patient Search

**Bulk Patient Search** Bulk Patient History

### Bulk Patient Search

How do you want to enter patients?

Manual Entry  
 File Upload

Is this search for a single supervisor or multiple supervisors?

Single Supervisor  
 Multiple Supervisors

Supervisor\*

Select Supervisor ▼

#### Manual Entry

First Name*	Last Name*	Date of Birth*	Zip Code	Add +
<input type="text"/>	<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text"/>	

The default settings are:

- Manual Entry or file upload
- Single Supervisor
- Select Supervisor
- Enter patient information, or Upload a file

## Multi-Supervisor Selection Entry

Bulk Patient Search

Bulk Patient History

### Bulk Patient Search

How do you want to enter patients?

- Manual Entry
- File Upload

Is this search for a single supervisor or multiple supervisors?

- Single Supervisor
- Multiple Supervisors

#### Manual Entry

First Name*	Last Name*	Date of Birth*	Zip Code	Supervisor*	<input type="button" value="Add +"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text"/>	<input style="border: none; background-color: #f0f0f0; padding: 2px 5px;" type="text" value="Select Supervisor"/>	

#### Name Grouping

Enter a name for this search session. This will make it easy to distinguish between searches in the history

Group Name\*

The advanced multi-supervisor setting:

- Manual Entry or file upload
- Multiple Supervisor
- New Supervisor entry field

# Multi-Supervisor Manual Entry

When you select “Multiple Supervisors” a dropdown Supervisor List will appear on each patient line. Select the correct Supervisor for each patient!

Bulk Patient Search

Bulk Patient History

## Bulk Patient Search

How do you want to enter patients?

- Manual Entry  
 File Upload

Is this search for a single supervisor or multiple supervisors?

- Single Supervisor  
 Multiple Supervisors

### Manual Entry

First Name*	Last Name*	Date of Birth*	Zip Code	Supervisor*	
Edward	Maguire	03/03/1970		R Kelly	✕ Remove
David	Banner	06/09/1969		Calivn N Hobbs	✕ Remove
		MM/DD/YYYY		Select Supervisor	Add +

The advanced multi-supervisor setting:

- Manual Entry
- Multiple Supervisor
- New Supervisor entry field

# Bulk Search – File Upload

A bulk search by file upload must include the correct supervisor's DEA for each patient!

**Bulk Patient Search** | Bulk Patient History

**Bulk Patient Search**

How do you want to enter patients?

Manual Entry

File Upload

Is this search for a single supervisor or multiple supervisors?

Single Supervisor

Multiple Supervisors

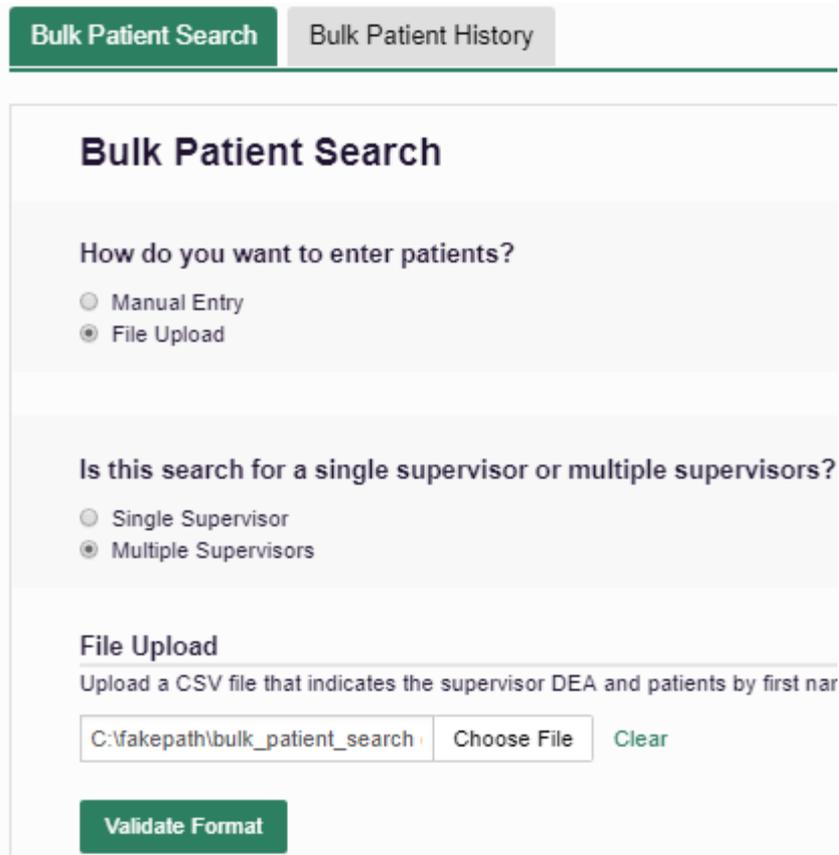
**File Upload**

Upload a CSV file that indicates the supervisor DEA and patients by first name, last name, and date of birth. [View Sample file](#)

- The advanced multi-supervisor setting:
- File Upload
  - Multiple Supervisor
  - Open the sample file to ensure your list is aligned with the required date elements, including the Prescriber's DEA number in the last column

1	First Name	Last Name	Birth Date	Supervisor DEA
2				
3				

## File Upload – Validate the Format and Data Fields



The screenshot shows the 'Bulk Patient Search' web interface. At the top, there are two tabs: 'Bulk Patient Search' (active) and 'Bulk Patient History'. Below the tabs, the main heading is 'Bulk Patient Search'. The form contains two sections of radio button options:

How do you want to enter patients?

- Manual Entry
- File Upload

Is this search for a single supervisor or multiple supervisors?

- Single Supervisor
- Multiple Supervisors

**File Upload**

Upload a CSV file that indicates the supervisor DEA and patients by first name

C:\fakepath\bulk\_patient\_search | Choose File Clear

**Validate Format**

An arrow points to the 'Validate Format' button.

The advanced multi-supervisor setting:

- You can opt to **validate** the file before running the report by selecting “Validate Format”. The system will populate the uploaded file and display any errors pertaining to the entry for each row, or record.

## Bulk Patient History

The output reports are viewable and stored historically within the Bulk Patient History table.

**Note:** Each patient searched will be added to the attributed supervisor's "Request History" table for their review.

→ Bulk Patient Search **Bulk Patient History**

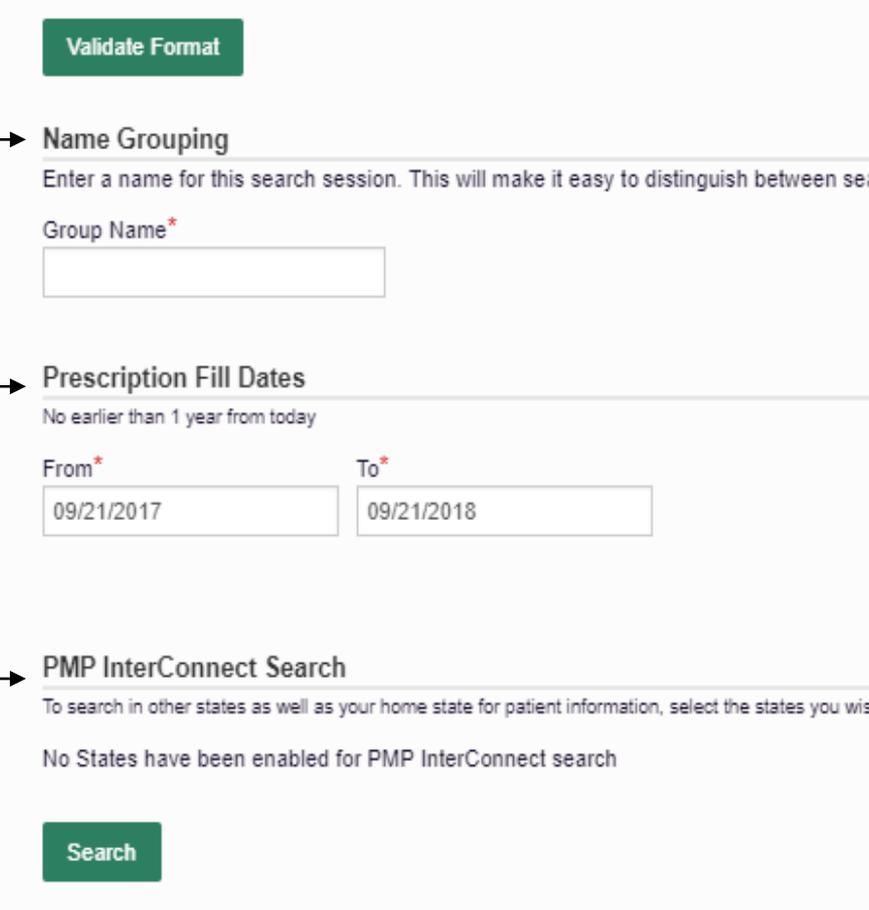
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### Bulk Search History

Select a group name to view reports run in that session.

Bulk Search Name	Number of Patients	Date Requested	Processing	Incomplete	Ready
Training_091318	3	09-13-2018	0	0	3
Testing Supervisor Choice 001	2	07-25-2018	0	0	2
Bulk_022717_4	0	02-27-2017	0	0	0
Bulk_022717_3	0	02-27-2017	0	0	0
Bulk_022717_2	0	02-27-2017	0	0	0

## Final Steps for all Bulk Patient Searches



**Validate Format**

→ **Name Grouping**  
Enter a name for this search session. This will make it easy to distinguish between searches.

Group Name\*

→ **Prescription Fill Dates**  
No earlier than 1 year from today

From\*      To\*

→ **PMP InterConnect Search**  
To search in other states as well as your home state for patient information, select the states you wish to search.

No States have been enabled for PMP InterConnect search

**Search**

Regardless of the method that you use for conducting a Bulk Patient Search, there are a few final steps to complete before the system will run the query.

The system requires you to name the Bulk Patient Search in the field entitled “Group Name”.

Also, you have the opportunity to reduce the date range for the search, or continue with the default (past 12 months)

Finally, if you wish to expand the system search to any applicable States, you can do so under the PMP InterConnect Search options.

Give PMP utilization credit where credit is due!  
Your Supervisors will  
Thank you!

If you have any questions, contact us at:  
[mapmp.dph@MassMail.state.ma.us](mailto:mapmp.dph@MassMail.state.ma.us)