

## Insys Litigation Documents: Sales Call Notes

### Summary and Sample Documents Explained:

Insys sales representatives kept detailed written reports of sales calls to target physicians. The notes, usually in emails sent to senior management, showed that Insys was aware of what the representatives were doing and who they were targeting. This includes pushing higher doses of Subsys and targeting doctors who ran pill mills and prescribed off-label. Insys also maintained generic call notes through an outside vendor, using pre-populated drop-down menus, as often seen with other drug companies.

The sales-call notes capture the actions of the sales representatives that put patient safety at risk. Strategies included targeting Subsys promotion to doctors who did not ordinarily treat cancer patients to increase prescribing for off-label uses, that were neither safe nor effective, and to doctors who over-prescribed Schedule II opioid drugs, despite the high potential for abuse. Soliciting doctors for higher doses encouraged shortening the label-mandated titration schedule designed to protect patients.

The selected documents are examples of sales call notes in the Insys collection.

### Sample Documents:

**Document Title:** RE: Ipad Drop Down for Call Note Ideas

**OIDA ID:** <https://www.idl.ucsf.edu/opioids/docs/#id=grxd0270>

**Date:** 2012-02

**Description:** Emails between [Darin Fila](#), senior director of professional development, [Xun \(Sean\) Yu](#), senior director of sales operations, and [Shawn Simon](#), vice president of sales, discussing drop-down options in the CRM [customer relationship management] software for current and post call notes. Simon states “we don’t want reps to have free text if that’s what you are asking...they write stuff that may be interpreted the wrong way.”

**Document Title:** Weekly Report

**OIDA ID:** <https://www.idl.ucsf.edu/opioids/docs/#id=tpdy0269>

**Date:** 2012-08

**Description:** [Sayra Toberson](#), sales representative for the Orange County, California territory, responds to an email from CEO [Michael Babich](#) about expectations for weekly updates for seven “top targets.” Two visits include stopping by with Starbucks and Sprinkles [cupcakes]: one to “thank the skeleton crew for the refills that went through this week” and the other “as a treat and thank you for the 1600 mgc. Script he wrote.”

**Document Title:** Northern New Jersey Doc Updates for 9/7

**OIDA ID:** <https://www.idl.ucsf.edu/opioids/docs/#id=hfjn0270>

**Date:** 2012-09

**Description:** Sales representative [Susan Beisler](#) sends updates to Babich for visits in August and September 2012 to northern New Jersey doctors. The summaries include physician concerns of writing off label, abuse potential and conversions, and potency of Subsys; as well as a physician’s willingness to write for chronic pain.

**Document Title:** Physician update

**OIDA ID:** <https://www.idl.ucsf.edu/opioids/docs/#id=qnbf0270>

**Date:** 2012-09

**Description:** [Holly Brown](#), sales representative for the northern Chicago territory, sends updates on to Babich for calls in August and September 2012. Included are notes on a physician who is “very mistrustful of his patients on these products” and concerned about misuse. Brow describes visits to Dr. Madison, who “runs a very shady pill mill and only accepts cash” and Dr. Ring who “is a little more responsible than Dr. Madison but also runs a pill mill.”

**Document Title:** Top Dr weekly update. Andrew McNaughton San Francisco.

**OIDA ID:** <https://www.idl.ucsf.edu/opioids/docs/#id=rrvn0269>

**Date:** 2012-09

**Description:** Sales representative [Andrew McNaughton](#) sends updates to Babich on physicians in San Francisco for calls in August and September 2012. McNaughton notes frequent messaging on titration and focus on Medicare patients.

**Document Title:** 9/14 Weekly Routing

**OIDA ID:** <https://www.idl.ucsf.edu/opioids/docs/#id=sxhl0269>

**Date:** 2012-09

**Description:** [Jessica Larichiuta](#), sales representative for the Baltimore, Maryland territory, sends updates to Babich for calls in August and September 2012. The notes include a doctor who “asked patient to contact me & work with local pharmacies to get her refill” and two doctors being anxious to write since they are speakers.

**Document Title:** Fwd: Raleigh, NC

**OIDA ID:** <https://www.idl.ucsf.edu/opioids/docs/#id=ttvb0271>

**Date:** 2012-09

**Description:** Sales representative [Carrie Dove](#) sends updates to Babich for calls in the Raleigh, North Carolina territory. Dove describes asking Dr. Cook “for his input and feedback on the higher doses if he uses a 1200 or 1600mcg dose bc I think he has the potential to write the higher doses and I think he will.” Dove also discussed a speaker lunch with Dr. Hodges “to detail the other providers – there is significant ROI potential here,” as well as detailing doctors about the benefits of the prior authorization assistance program.

**Document Title:** Report: Daily Call Report run at 11/29/2013 1:06 AM

**OIDA ID:** <https://www.idl.ucsf.edu/opioids/docs/#id=lkqd0276>

**Date:** 2013-11

**Description:** This email contains a generic style of call notes from 360 Vantage, a company Insys contracted with to track and manage sales force activity for the field-based sales team. The report is filtered for all territories from 11/23/2013 to 11/29/23 and contains call discussion notes such as “5-Minute onset, only product in the class” and “BTCP [breakthrough cancer pain] characteristics & assessment.”

**Document Title:** Judy Henderson ABL was on vacation last week NO report

**OIDA ID:** <https://www.idl.ucsf.edu/opioids/docs/#id=szdg0275>

**Date:** 2013-12

**Description:** [Jeff Leischner](#), sales representative for the Denver, Colorado territory, sends updates to [Judy Henderson](#), Area Business Liaison. The call notes mention involvement with sending LMNs (letter of medical necessity) and physician notes for several patients.

**Document Title:** Call Notes/Audit

**OIDA ID:** <https://www.idl.ucsf.edu/opioids/docs/#id=jrpl0271>

**Date:** 2013-12

**Description:** [Adam Toronto](#), Director of Commercial Compliance & West Coast Consulting for Compliance Implementation Services (CIS), emails [Desiree Hollandsworth](#), associate director for medical marketing communications, to request a report of any call notes for the top 20 prescribers.

### Additional Documents

- [fkph0270](#)
- [lrmy0272](#)
- [htlp0270](#)
- [ptqk0273](#)
- [khvv0277](#)
- [sthp0272](#)
- [ftcm0275](#)
- [nspn0270](#)
- [fspy0270](#)
- [zmcd0270](#)
- [fjhp0272](#)
- [nndh0270](#)
- [hjyp0270](#)
- [knhp0270](#)
- [zkdp0271](#)