

Open Payments System Quick Reference Guide

Teaching Hospital Registration

Introduction

This guide provides an overview of teaching hospital registration in the Open Payments system.

Prerequisites

User is registered in the Centers for Medicare & Medicaid Services (CMS) Identity Management system (IDM) and has obtained access to the Open Payments system.

Actions

Teaching Hospital Registration

Creating a profile as a user affiliated with a teaching hospital will allow you to see only data related to that teaching hospital. If you are a physician or non-physician practitioner (NPP) affiliated with a teaching hospital and wish to see data related to you in your capacity as a physician or NPP, select the “Physician or Non-Physician Practitioner” option when creating your profile. You may create a profile as a physician or an NPP and a user affiliated with a teaching hospital, if needed.

First-Time System Users

If you are a first-time Open Payments system user, follow these instructions:

1. Using your IDM credentials, log in to the CMS Enterprise Portal at <https://portal.cms.gov> and navigate to the Open Payments home page.
2. On the Open Payments home page, select “Create My Profile.”
3. On the “Create Profile” page, scroll to the bottom of the page and select “Start Profile.”
 - a) A list of the information required for registration is available in the “Required Fields for Registration” quick reference guide. This guide is available on the Resources for Covered Recipients page of the Open Payments website (<https://www.cms.gov/priorities/key-initiatives/open-payments/resources/covered-recipients>).
4. On the “Select Profile Type” page, select the “Teaching Hospital” radio button, then select “Continue” to begin the profile creation process.
5. Search for the teaching hospital by selecting the hospital’s state, name, taxpayer identification number (TIN), and business address from the drop-down fields on the screen.
 - a) If your teaching hospital is found and it **has no profile** in the Open Payments system, confirm the information provided and proceed to step 6.

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- b) If your teaching hospital is found and it **has** a profile in the Open Payments system. Stop the profile creation process. To associate yourself with the teaching hospital, you can either ask an individual already registered with the teaching hospital in Open Payments to nominate you for a user role, or you can nominate yourself for a user role with the hospital.
 - c) To self-nominate, refer to the quick reference guide “Teaching Hospital User Roles and Nominations,” which is available on the Resources for Covered Recipients page of the Open Payments website (<https://www.cms.gov/priorities/key-initiatives/open-payments/resources/covered-recipients>).
 - d) If your teaching hospital is **not** found, select “Search Teaching Hospital for Prior Program Year” to search for your teaching hospital using information from a previous program year. If you find your teaching hospital, you may select it.
6. On the “Your Role” page, review your personal information and user role. You may edit the information fields, if necessary. Select the “Continue” button to proceed.
- a) As you are registering the hospital, you will automatically be assigned the role of authorized official.
 - b) Refer to the quick reference guide “Teaching Hospital User Roles and Nominations” for more information on user roles.
7. On the “Nominate Roles” page, you may nominate additional individuals to fulfill user roles. To nominate individuals while creating the profile, select the “Add” button and enter the individual’s relevant contact information. When the individual’s information has been entered, select the “Add” button again. If you do not select the “Add” button, the nominee information will not be saved. You are not required to nominate any other individuals, and you may nominate individuals after the profile is complete. When you are done, select the “Continue” button to proceed.
- a) Teaching hospital users can have one of two roles: authorized official or authorized representative.
 - b) Authorized officials can:
 - i. Register the teaching hospital in the Open Payments system;
 - ii. Nominate other users and modify existing user roles;
 - iii. Approve or modify nominations made by others and requests for user roles made by others, including self-nominations;
 - iv. Remove user roles from other users; and
 - v. Review and dispute records associated with the teaching hospital.
 - c) Authorized representatives can:
 - i. Review and dispute records associated with the teaching hospital; and
 - ii. Nominate other individuals for user roles with teaching hospital (nominations must be approved by an authorized official).
 - d) A teaching hospital may have up to 10 affiliated users, with no more than 5 individuals holding the role of authorized official.
8. Enter your personal information in the fields displayed on the screen. Select the “Continue” button to proceed.

Last Modified: January 2024



9. Review the information on the “Review and Submit Profile” page and select “Continue” to complete the registration.

You will have access to the teaching hospital data as soon as the profile is complete.

Individuals nominated for user roles will be sent nomination notification emails. They will have access to the teaching hospital profile as soon as they accept their nominations.

Note: An authorized official of a teaching hospital may deactivate another authorized official or authorized representative from that teaching hospital. Refer to the quick reference guide “Teaching Hospital User Roles and Nominations” for more information on how to deactivate a user.

Returning System Users

Follow these instructions if you are a returning Open Payments system user and have already completed a user profile.

1. Using your IDM credentials, log in to the CMS Enterprise Portal at <https://portal.cms.gov> and navigate to the Open Payments home page.
2. Navigate to the “Manage Teaching Hospitals” tab and select “Register New Teaching Hospital.”
3. Search the current teaching hospital program year list using the dropdown fields on the screen.

If your teaching hospital is found and it **has not** yet been registered in the Open Payments system, confirm the information provided and proceed to step 4.

If your teaching hospital is found and it **has** already been registered in the Open Payments system, stop the registration process. To associate yourself with the teaching hospital, you can either ask an individual already registered with the teaching hospital in Open Payments to nominate you for a user role, or you can nominate yourself for a user role with the hospital. To self-nominate, refer to the quick reference guide “Teaching Hospital User Roles and Nominations,” which is available on the Resources page of the Open Payments website.

If your teaching hospital is **not found** in the current program year search results, select

“Register for Prior Program Year” to search for your teaching hospital using a list from a previous program year. If your teaching hospital is found on a prior program year list, you may select your teaching hospital and proceed with registration.

4. On the “Your Role” page, review your personal information and user role. You may edit the information fields, if necessary. Select the “Continue” button to proceed.
 - a) You will automatically be assigned the role of authorized official for that teaching hospital.
 - b) Refer to the quick reference guide “Teaching Hospital User Roles and Nominations” for more information on user roles.
5. On the “Nominate Roles” page, you may nominate additional individuals to fulfill user roles. To nominate individuals during registration, select the “Add” button and enter that individual’s

Last Modified: January 2024



relevant contact information. When the individual's information has been entered, select the "Add" button again. If you do not select the "Add" button, the nominee information will not be saved.

6. You are not required to nominate any other individuals, and you may nominate individuals after registration is complete. When you are done, select the "Continue" button to proceed.
 - a) Teaching hospital users can have one of two roles: authorized official or authorized representative.
 - b) Authorized officials can:
 - i. Register the teaching hospital in the Open Payments system;
 - ii. Nominate other users and modify existing user roles;
 - iii. Approve or modify nominations made by others and requests for user roles made by others, including self-nominations;
 - iv. Remove user roles from other users; and Review and dispute records associated with the teaching hospital.
 - c) Authorized representatives can:
 - i. Review and dispute records associated with the teaching hospital; and
 - ii. Nominate other individuals for user roles with teaching hospital (nominations must be confirmed by an authorized official).
 - d) A teaching hospital may have up to 10 affiliated users, with no more than 5 individuals holding the role of authorized official.
7. Enter your personal information in the fields displayed on the screen and select the "Continue" button.
8. Review the information on the "Review and Submit Profile" page and select the "Continue" button to complete teaching hospital profile creation.

You will have access to the teaching hospital data as soon as the profile is complete. Individuals nominated for user roles will be sent nomination notification emails. They will have access to the teaching hospital profile as soon as they accept their nominations.

An authorized official of a teaching hospital may deactivate another authorized official or authorized representative from that teaching hospital. Refer to the quick reference guide "Teaching Hospital User Roles and Nominations" for more information on how to deactivate a user.

Next Steps

- Review data submitted about the teaching hospital and affirm or dispute the data as necessary.

Additional Resources

All registration resources can be found on the Resources for Covered Recipients page of the Open Payments website at <https://www.cms.gov/priorities/key-initiatives/open-payments/resources/covered-recipients>.

If your teaching hospital **still** cannot be found, contact the Open Payments Help Desk at openpayments@cms.hhs.gov or 1-855-326-8366 or 1-844-649-2766 (TTY line) for assistance.

The “Physician, Non-Physician Practitioner and Teaching Hospital Registration” section of the Open Payments User Guide for Covered Recipients explains the entire registration process in detail and provides step-by-step instructions for various scenarios.

Quick reference guides useful for next steps include:

- Required Fields for Registration
- Teaching Hospital User Roles and Nominations

Disclosure

- **Disclaimer:** The contents of this document do not have the force and effect of law and are not meant to bind the public in any way, unless specifically incorporated into a contract. This document is intended only to provide clarity to the public regarding existing requirements under the law.
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