

Open Payments System Quick Reference Guide

Nominating a Physician Authorized Representative and Accepting/Rejecting Nominations

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Overview

Physicians can nominate one individual as their authorized representative, who can perform certain actions on their behalf in the Open Payments system. Individuals cannot nominate themselves for the role of authorized representative; the physician must nominate the individual for the role. This guide provides an overview of:

- The access levels available for physician authorized representatives;
- How you nominate an individual to serve as an authorized representative; and
- How individuals can accept or reject the nomination to be an authorized representative.

Note: Before you can begin any of the following scenarios, you must successfully register in the Enterprise Identity Management (EIDM) system and receive access to the Open Payments system.

Refer to the “Open Payments System Quick Reference Guide – Enterprise Identity Management (EIDM) Registration” for detailed instructions on how to complete EIDM registration.

Physician Authorized Representative

A physician may have only **one authorized representative**. When nominating that individual, the physician will designate the level(s) of access the authorized representative will have. More than one level can be granted to the representative. Access levels are:

- **Read:** Default access level. Able to see physician’s profile and records information.
- **Modify Profile:** Able to edit or enter the physician’s “My Profile” information (NPI, license, specialties, etc.).
- **Dispute Records:** Able to affirm and dispute reported payments or other transfers of value, ownership, and investment interests.

The levels of access are not cumulative. For example, possessing “dispute records” access does not provide “modify profile” access, or vice versa.

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How to Nominate an Individual to be a Physician Authorized Representative

If you are a physician, you can nominate an authorized representative either during or after initial physician registration.

To nominate a physician authorized representative during physician registration, follow the instructions in the “Open Payments System Quick Reference Guide – Physician Registration.”

To nominate an authorized representative after physician registration has been completed, follow the steps below.

1. Log in to the Open Payments system via the CMS Enterprise Portal at <https://portal.cms.gov> and select the “My Profile” tab.
2. Select the “My Profile Details” tab. Select “Update Profile.”
3. Select “Yes, designate an authorized representative.” The fields required to nominate an authorized representative will appear on the screen.
4. Enter information on the nominee for all required fields. The default level of access is “Read.” For other levels, select “Modify Profile” and/or “Dispute Records.” When done, select “Save Updates.”

The nominee will then receive an email notification instructing him or her to log into the Open Payments system and either accept or reject the nomination.

How to Accept or Reject an Authorized Representative Nomination

If you have been nominated by a physician for the role of that physician’s authorized representative, you will receive an email notification. The notification contains a Nomination ID, which is needed to accept or reject the nomination. You have 10 calendar days to accept or reject a nomination. At the end of the 10-day period, the nomination request will become inactive.

First-Time System Users

If you are a new Open Payments system user and have not completed a user profile, follow these instructions. Be sure to have the nomination ID from your nomination notification email on hand.

1. Log in to the Open Payments system via the CMS Enterprise Portal at <https://portal.cms.gov> and select “Create My Profile.”
2. Select “Start Profile” at the bottom of the screen.
3. Select the “I have a Nomination ID and Registration ID” link on the “Select Profile Type” page.
4. Select the user type “Physician” from the drop-down list and enter the nomination ID from the nomination notification email. Select “Show Nomination.” Review the information. If it is

incorrect, select “Cancel” to end the registration process, then contact the physician who nominated you directly. If it is correct, select “Continue.”

5. If you have continued, review and confirm the physician information displayed. Select “Continue” to proceed.
6. Select “Yes, I accept” to accept the role or “No, I do not accept” to reject the role. If you do not accept, the process ends and you will not be able to perform any activities for that physician in the Open Payments system. If you accept the role and select “Continue,” you will continue the nomination confirmation process.
7. If you have continued, enter your personal information and select “Continue.”
8. Review the information entered. To correct errors, select “Back” to return to previous pages and make your corrections. If the information is correct, select “Submit.”

Returning System Users

Follow these instructions if you are a returning Open Payments system user and have already completed a user profile. Be sure to have the nomination ID from the nomination notification email on hand.

1. Log in to the Open Payments system via the CMS Enterprise Portal at <https://portal.cms.gov> and select the “My Profile” tab.
2. Select “My Roles and Nominations,” then select “Accept/Reject Nominations.”
3. Select the user type “Physician” from the drop-down list and enter the nomination ID from the notification email. Select “Show Nomination.” Review the information. If it is incorrect, select “Cancel” to end the registration process, then contact the physician who nominated you directly. If it is correct, select “Continue.”
4. If you have continued, select “Yes, I accept” to accept the role or “No, I do not accept” to reject the role. If you do not accept, the process ends and you will not be able to perform any activities for that physician in the Open Payments system. If you accept the role and select “Continue,” you will continue the nomination confirmation process.
5. Review the information. To correct errors, select “Back” to return to previous pages and make your corrections. If the information is correct, select “Submit.”

Supporting Resources

Supporting resources are available on the “Resources” page of the Open Payments website at <http://www.cms.gov/OpenPayments/About/Resources.html>.