



# *Open Payments*

## Phase 2 Physician and Teaching Hospital Registration

### O P E N P A Y M E N T S

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C R E A T I N G P U B L I C T R A N S P A R E N C Y  
I N T O I N D U S T R Y - P H Y S I C I A N  
F I N A N C I A L R E L A T I O N S H I P S

**August 2014**

*CMS Disclaimer: This information is a summary of the final rule implementing Open Payments (Medicare, Medicaid, Children's Health Insurance Programs; Transparency Reports and Reporting of Physician Ownership or Investment Interests [CMS-5060-F], codified at 42 CFR Parts 402 and 403). The summary is not intended to take the place of the final rule which is the official source for information on the program.*

# Open Payments Registration Overview

- Registration is for physicians and teaching hospitals who wish to review or dispute the following information reported about them by applicable manufacturers and applicable GPOs (“reporting entities”):
  - Payments made to physicians and teaching hospitals
  - Other transfers of value made to physicians and teaching hospitals
  - Ownership or investment interests held by physicians or their immediate family members
- Registration is conducted in two phases for this first Open Payments reporting year

# Phase 1 Registration Overview: EIDM

- Phase 1 Registration began June 1, 2014 and is ongoing
- Physicians and Teaching Hospitals can register with CMS's Enterprise Identity Management system (EIDM) - EIDM registration is required to perform activities in the Open Payments system
  - Go to the [CMS Enterprise Portal \(https://portal.cms.gov\)](https://portal.cms.gov)
  - Create an EIDM user ID and password
  - Request access to the Open Payments system
- Review the Phase 1 step-by-step CMS Enterprise Portal Registration for Physicians and Teaching Hospitals webinar on the [Program Registration](#) and [Data Submission and Attestation](#) pages at <http://go.cms.gov/openpayments>

# Phase 2 Registration Overview: Open Payments System

- Beginning July 14, 2014, physicians and teaching hospitals can:
  - Register in the Open Payments system
    - No official end date for when physicians need to finish the registration steps
  - Review and dispute **2013** data submitted by reporting entities prior to the publication of the data
    - Begins on July 14 and ends on August 27

**Note:** If a physician wants to participate in the review/dispute period for 2013 Open Payments data, CMS advises that they complete registration in EIDM and Open Payments by the end of the initial 45-day review/dispute period. Identity verification for registration will take some time, so it is recommended that the registration process be completed as soon as possible.

# **Open Payments System User Roles and Common Registration Scenarios**

# User Roles for Physicians

User Role	Function
Physician	<ul style="list-style-type: none"><li>• Registers him- or herself in the system</li><li>• Nominates an authorized representative</li><li>• Has full access to review and dispute records</li></ul>
Authorized Representative	<ul style="list-style-type: none"><li>• Allowed activities depend upon access levels granted by physician:<ul style="list-style-type: none"><li>— <u>Read-only</u>: (default) Able to see a physician's "My Profile" and records information</li><li>— <u>Modify Profile</u>: Able to edit or enter a physician's "My Profile" information (NPI, license, specialties, etc.)</li><li>— <u>Dispute Records</u>: Able to dispute records related to the physician submitted by reporting entities</li></ul></li><li>• Access levels are separate; having "dispute records" access does not automatically include "modify profile" access, or vice versa</li><li>• Must be nominated by the physician</li></ul>

# User Roles for Teaching Hospitals

**Physicians should register for the user role of “Teaching Hospital” only if they wish to represent the teaching hospital**

User Role	Function
Authorized Official	<ul style="list-style-type: none"><li>• Registers the teaching hospital in the Open Payments system</li><li>• Modifies the teaching hospital’s profile in the Open Payments system</li><li>• Nominates other users and modifies existing user roles</li><li>• Approves/denies nominations made by others, including self-nominations</li><li>• Reviews and disputes records associated with the teaching hospital</li></ul>
Authorized Representative	<ul style="list-style-type: none"><li>• Reviews and disputes records associated with the teaching hospital</li><li>• Nominates other individuals for user roles with teaching hospital</li></ul>

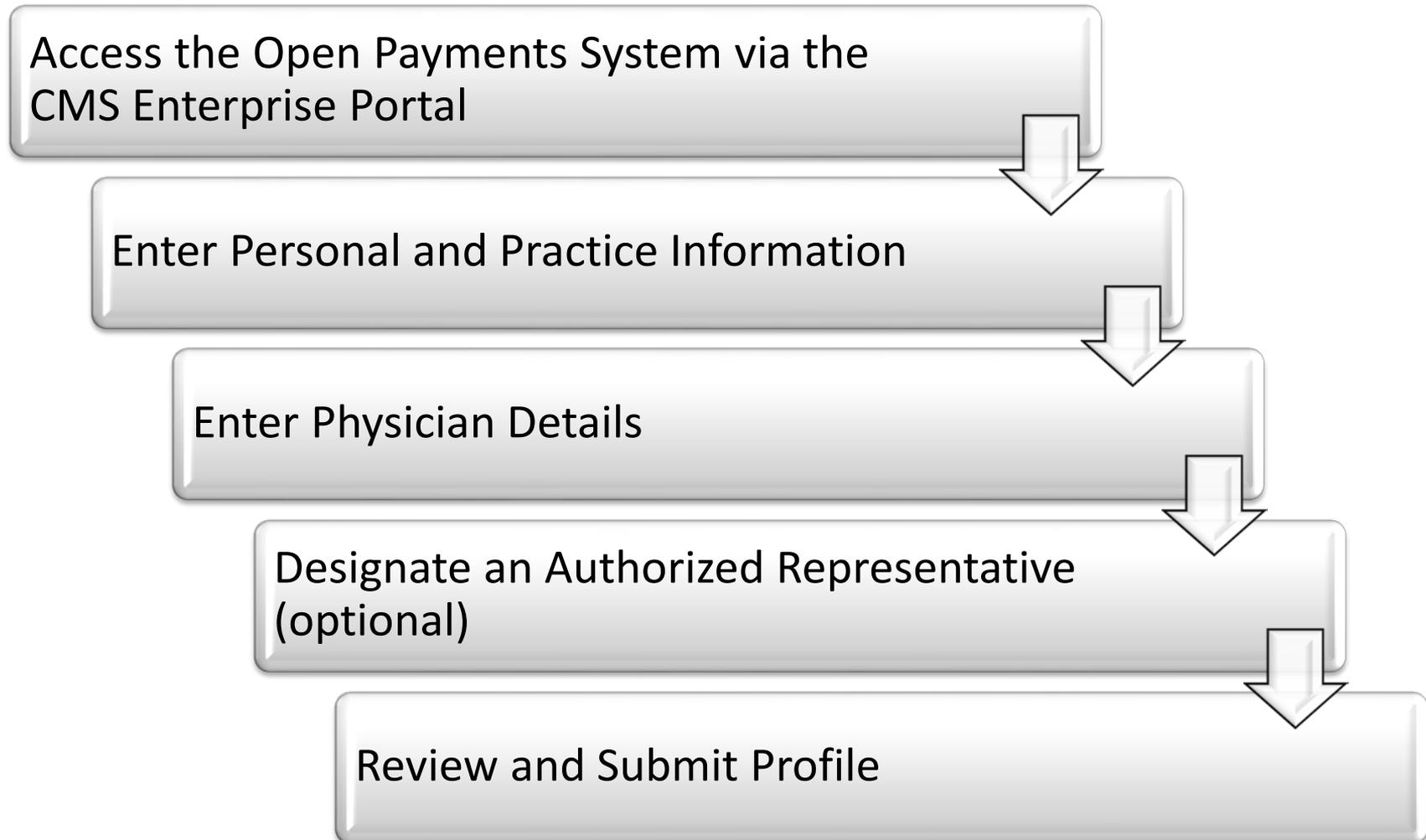
# Physician Registration Instructions

# Before Beginning Physician Registration

The person registering must:

- **Have an EIDM user ID and password on hand**
- Have access to the Open Payments application through EIDM (system will log you out after 30 minutes of inactivity)
- Have the required profile information available
- Know who to nominate for the authorized representative role, if anyone (may nominate only one authorized representative)
- Study the levels of access for authorized representative and determine who will fill the role and what levels of access you will grant them
- Use Internet Explorer versions 8-10, Chrome or Firefox browsers. Currently the Open Payments system is not optimized for the Safari browser
- Only use the navigation buttons within the Open Payments system itself—never use the navigation buttons on your browser toolbar

# Physician Registration Process Overview



# Step 1: Log into the Open Payments System via the CMS Enterprise Portal

## Open Payments (Sunshine Act)

### Welcome to the Open Payments System

*Note: Our records indicate you have not registered with the Open Payments reporting application before. You must create your profile in order to use the System.*



Begin by accessing the Open Payments system via the CMS Enterprise portal using your EIDM login credentials. Go to the top menu bar on the Enterprise portal screen and select the “Open Payments” tab. This takes you to the Open Payments landing page. Read the information on the page, as it provides a great deal of information about registration.

Once you've read the page, select the “Create My Profile” button, shown here.

# Step 2: Read the Create Profile Screen

## Open Payments (Sunshine Act)

Physician [Select User Type](#)

### Create Profile

1 Select Profile Type

2 Register Entity

3 Personal Information

4 Review and Submit Profile

 [Access the Open Payments User Guide](#)

 [Need help with the website? CONTACT US by email](#)

### Create Profile

To begin creating a profile and registering in the Open Payments system, you must identify a affiliation with an applicable manufacturer, applicable group purchasing organization (GPO), teaching hospital, or identify as a physician or physician's authorized representative. During the process, you will also have the ability to nominate additional authorized users or representatives.

Note: When registering, it is important that you have all required information available, as registration must be completed in one session. Also note that your session will time out after minutes of inactivity and all information inputted during that session will be lost.

The information needed to create your user profile or nominate additional authorized users or representatives includes:

- Name
- Job title
- Email address
- Business address
- Phone number

In addition to the above information for user profile creation, other information is collected during the registration process. The additional information for each type of registration is provided in sections below. Once you are ready to begin, select the "Start Profile" button.

There are three categories of registration in the Open Payments system (each of these categories is discussed in the following sections):

1. Registration for an applicable manufacturer or applicable GPO (i.e., "reporting entity")
2. Registration for a physician
3. Registration for a teaching hospital (must be part of [CMS-approved list](#))

#### 1. Registration for an applicable manufacturer or applicable GF (i.e., "reporting entity")

To register an applicable manufacturer or applicable GPO, you must be an authorized official within the entity, and must assume a system role of "officer" while registering the entity. An authorized official is a Chief Executive Officer, Chief Financial Officer, Chief Compliance Officer, or other "C-Suite" official of the reporting entity. You may add other roles for yourself, such as submitter and/or attester, or nominate additional users for your entity at the time of registration.

Note: If you are the authorized official for the entity who completed EIDM registration of entity during Phase 1, you may search for the entity for which you submitted Phase 1 information by following the steps given below and selecting the appropriate link on the next screen. Once you are on the associated entity profile, some of the fields are pre-populated with the data submitted in Phase 1. Begin by confirming the accuracy of the pre-populated data, then complete the remainder of the information. If the data submitted in Phase 1 is not pre-populated, it may be due to one of the following reasons:

- Data submitted during Phase 1 did not process (possibly due to errors in the submitted data).
- Data was submitted after the Phase 1 deadline; or
- Data submitted contained all 0 (zeros) or only NULL values.

Contact [openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov) for guidance if you see any other discrepancy between Phase 1 submissions and the pre-populated data fields shown in the entity

Page continued...

#### 2. Registration for a physician

If you are a physician, you must first create your own profile. You may then nominate another user as an authorized representative during the registration process. If you are a physician's authorized representative, you may register for a physician by entering the nomination ID provided to you previously from a nomination notification email, then following the steps provided within the system.

To register for a physician the following information is needed.

A field with an asterisk (\*) is required.

- First Name \*
- Middle Name
- Last Name \*
- Suffix (Jr., Sr., etc.)
- National Provider Identifier (NPI)
- License number and license state (all states in which the physician holds an active license) \*
- Primary type (a 10-digit alphanumeric series that represents the physician's primary practice) \*
- Specialty code (a 10-digit alphanumeric series that represents the physician's specialty) \*
- Drug Enforcement Agency (DEA) Number
- Business Email Address \*
- Physician practice name (legal name of the practice)
- Physician practice business address (if multiple practice addresses, enter the primary business address) \*
- Business Telephone Number

#### 3. Registration for a teaching hospital

To register for a teaching hospital you must be an authorized official for that teaching hospital and must assume a system role of an "authorized official" during registration. You may also nominate additional users as "authorized representatives" for the teaching hospital during registration.

To register for a teaching hospital the following information is needed.

A field with an asterisk (\*) is required.

- State where the teaching hospital is located \*
- Teaching hospital name \*
- Teaching hospital address \*
- Employer Identification Number (EIN)/Taxpayer Identifier Number (TIN) \*
- National Provider Identifier (NPI) \*

Cancel

Start Profile

Start Profile

After you've read this page, select "Start Profile".

Please note that if you select the "Cancel" button at any point during the registration process, all data you've entered will be lost.

Page continued...

# Step 3: Select Profile Type

## Open Payments

Physician [Switch User Type](#)

<b>Home</b>	<b>Payments</b> View, Edit, Report (Transfers of Value)	<b>Manage Physicians</b> Register, Edit, Nominate Roles	<b>My Profile</b> Account, Roles, Notifications	<b>Help</b>
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**Create Profile**

- 1 Select Profile Type
- 2 Register Entity
- 3 Personal Information
- 4 Review and Submit Profile

[Access the Open Payments User Guide](#)

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## Select Profile Type

Indicate whether you are affiliated with an applicable manufacturer or applicable GPO, teaching hospital, or physician to begin creating your profile.

A field with an asterisk (\*) is required.

\* Required: Select the type of entity or covered recipient you are affiliated with.

Choose the type of entity or covered recipient you are affiliated with:

- Applicable Manufacturer or Applicable GPO
- Physician
- Teaching Hospital

----- OR -----

[I have a Nomination ID and Registration ID](#)

Cancel

Continue

The “Physician” user role should be selected to allow a physician to review and dispute records submitted about him- or herself. Select “Continue.”

# Step 4: Enter Personal Information

## Open Payments (Sunshine Act)

Physician [Switch User Type](#)

Home    **Review and Dispute**  
Review, Affirm, Dispute    **My Profile**  
Account, Roles, Nominations    Help

Create Profile

- Select Profile Type
- 2 Personal Information**
- Physician Details
- Authorized Representative
- 3 Review and Submit Profile

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### Physician: Personal Information

A field with an asterisk (\*) is required.

Add the requested personal and business information to your user profile. Also, review any pre-populated information for accuracy and correct any invalid information.

Note that changes made here will not automatically update your profile information in your other CMS accounts, such as Medicare, National Plan & Provider Enumeration System (NPES), or Enterprise Identity Management (EIDM) accounts.

Your Name

\* First Name:  Middle Name:

\* Last Name:  Suffix (Jr., Sr., etc.):

Business Information

Enter your contact business email address, business telephone number, and your primary practice location address. This information will be used to help verify your identity as a physician. If you have multiple practice addresses, enter the primary business address.

\* Business Email Address:  \* Business Telephone Number:

XXXX-XXX-XXXX

Physician Practice Name:

Physician Practice Business Address

\* Practice Business Address, Line 1:

Practice Business Address, Line 2:

\* City Name:  \* State:  \* Zip Code:

XXXXX XXXXX

Cancel    Back    **Continue**

When you are done entering your personal information, select “Continue.”

Note that pressing the “Cancel” button will cause you to lose all data entered.

# Step 5: Enter Physician Details

## Open Payments (Sunshine Act)

Physician [Switch User Type](#)

Home **Review and Dispute** [Review, Affirm, Dispute](#) **My Profile** [Account, Roles, Nominations](#) Help

### Create Profile

✓ Select Profile Type

② Personal Information

Physician Details >

Authorized Representative

③ Review and Submit Profile

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➡ Access the Open Payments User  
Guide

### Physician: Physician Details

A field with an asterisk (\*) is required.

Enter the required physician information below. Make sure to enter your National Provider Identifier (NPI) if you have one. Also, enter specialty and licensing information.

#### Physician Identification

\* Physician Primary Type:

Medical Doctor

National Provider Identification (NPI):

1234561234

The NPI is a 10-digit number; do not use any dashes or other special characters

Drug Enforcement Administration (DEA) Number:

A12345612

The DEA number is a 9-alphanumeric ID; do not use any dashes or other special characters

#### Physician Specialty Codes

Enter the Physician Specialty Code. Click on "Add Specialty Code" if you have more than one specialty. Note: Physician codes are sometimes referred to as "taxonomy codes."

Refer to the [Open Payments User Guide](#) for the available taxonomy codes that can be entered for the Physician Specialty field.

\* Physician Specialty Code:

207U00000X

+ ADD SPECIALTY CODE

#### State Licensing Information

Enter at least 1 and up to 52 state license numbers and issuing state combinations. Exclude any special characters that appear in the license number. Select "Add License" to add more licenses.

License State:	License Number:	Actions:
Maryland	1234512345	<a href="#">Edit</a> <a href="#">Delete</a>

- ADD LICENSE

Cancel

Back

Continue

On this screen, you'll enter the Physician's primary specialty code. The primary specialty code is also known as a taxonomy code. The system will provide a dropdown list of codes to help guide your entry.

In the state licensing section, the license number field accepts only letters and numbers. Any other characters, such as periods or hyphens, should not be entered.

If the physician has licenses in more than one state, enter in the first state and license number and then select "Add License." Repeat until all of the physician's state licenses are added, up to 52 licenses.

Once you've added all of the required physician details, select 'Continue'.

# Step 6: Nominate Representative (optional)

**Open Payments (Sunshine Act)**  
Physician [Switch User Type](#)

Home **Review and Dispute** My Profile Account, Roles, Nominations Help  
Review, Affirm, Dispute

**Create Profile**

- Select Profile Type
- Personal Information
- Physician Details >
- Authorized Representative
- Review and Submit Profile

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Access the Open Payments User Guide

### Physician: Authorized Representative

A field with an asterisk (\*) is required.

A physician may designate the authorized representative to take certain actions on his or her behalf in the Open Payments system. This person can be another physician, an office manager, a practice manager, or another person the physician would like to designate to interface with the Open Payments system on his or her behalf.

The nominated authorized representative will receive an email stating that he or she has been nominated for the role. The nominated authorized representative must accept this role in the Open Payments system to become an authorized representative. If the nominee does not accept the role, the physician may nominate another person.

#### Nominate the Authorized Representative in the Open Payments System

Nominations can be made now or later, and can be completed by updating the physician's profile. The nominee will have 10 business days to accept or reject the role. Open Payments will render the nomination inactive if the nominee does not respond within 10 business days.

Please note that an authorized representative nominee must register in the Enterprise Identity Management (EIM) to obtain credentials before he or she can register and accept his or her role in the Open Payments system. If the nominee accepts the role, he or she will then be prompted to create an individual profile in the Open Payments system.

**\*Designate an authorized representative?**

Designate an authorized representative

Not now

#### Authorized Representative

Enter the name, business email, job title, and business telephone number of the nominated authorized representative.

\* Authorized Representative's First Name: Middle Name:  
Jane

\* Authorized Representative's Last Name: Suffix (Jr., Sr., etc.):  
Doe

\* Business Email Address: \* Business Telephone Number:  
physicianrep@yopmail.com 555-555-5555  
XXXX-XXX-XXXX

\* Job Title:  
Office Manager

#### Authorized Representative's Business Address

Enter the nominated authorized representative's business address information below. Enter the primary business address if the authorized representative has multiple business addresses.

\* Business Address, Line 1:  
7500 Security Blvd

Business Address, Line 2:

\* City Name: \* State: \* Zip Code:  
Baltimore Maryland 21244  
XXXXX XXXXX

#### Nominated Authorized Representative's Access Level

By default, your authorized representative can read any information in the physician's profile in the Open Payments system. Select any additional level(s) of access to be granted to the authorized representative below. The access level will determine the actions the authorized representative can take on behalf of the physician in the Open Payments system. Regardless of the access level assigned to an authorized representative, authorized representatives cannot edit access levels.

\* Access Level:

**Read** - Default access level. Able to see physician 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 comment on information submitted about payments or other transfers of value, ownership, and investment interests with the submitter (applicable manufacturer or OPO). Also able to dispute reported payments or other transfers of value, ownership, and investment interests.

Cancel Back **Continue**

On this screen you can designate a person to be your authorized representative within the Open Payments system. By default, “Designate an authorized representative” will be selected.

If you wish to designate someone, enter in the required information. You will also be asked to select the access level for the authorized representative. If you choose not to designate an authorized representative at this time, select “Not Now.”

When you are finished, select “Continue.”

You do not need to designate an authorized representative during initial registration.

Please note that a physician cannot be his or her own authorized representative.

# Step 7: Review and Submit Profile

## Open Payments (Sunshine Act)

Physician [Switch User Type](#)

Home Review and Dispute  
Review, Affirm, Dispute My Profile  
Account, Roles, Nominations Help

### Create Profile

- ✓ Select Profile Type
- ✓ Personal Information
- Physician Details
- Authorized Representative
- 3 Review and Submit Profile**

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Access the Open Payments User Guide

### Review and Submit Profile

Review the information on this page to ensure it is correct. Select "Back" to navigate to the previous pages to correct any invalid information. Select "Submit Profile" to submit your profile.

#### Personal Information

Name:  
John Doe

Business Email Address:  
physician@yopmail.com

Business Telephone Number:  
555-555-5555

Physician Practice Name:  
Physician Practice Business Address:  
7500 Security Blvd  
Baltimore, Maryland 21244

#### Physician Information

Physician Primary Type:  
Medical Doctor

Rational Provider Identifier (RPI):  
1234561234

Drug Enforcement Administration (DEA) Number:  
A12345612

Specialty Codes:  
1 Allopathic & Osteopathic Physicians/ Nuclear Medicine

State Licenses:  
License State: License Number:  
Maryland 1234512345

#### Physician's Authorized Representative:

Authorized Representative:  
Jane Doe

Business Email Address:  
physicianro@yopmail.com

Business Telephone Number:  
555-555-5555

Job Title:  
Office Manager

Business Address:  
7500 Security Blvd  
Baltimore, MD 21244

Access Level:  
Review Data (Read-Only)  
Edit Physician profile  
Dispute Data

Cancel Back Submit

Now you'll be asked to review the information that you've entered.

To correct any errors, select **"Back"** on the bottom of the page to return to previous pages and make your corrections.

If the information is correct, select **"Continue"**.

# On-Screen Confirmation

## Open Payments (Sunshine Act)

Physician [Switch User Type](#)

Create Profile

- ✓ Select Profile Type
- ✓ Physician Information
- ✓ Authorized Representative
- ✓ Review and Submit Profile

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Access the Open Payments User Guide

You have successfully created your profile as a physician.

### John Doe

You may now

- Go to [Open Payments Home](#).
- Refer to the [Open Payments User Guide](#) for further information

**Note:** You will not be able to take any actions in the Open Payments system related to this profile until the profile is registered. The profile will be registered once your identity as a physician is successfully vetted. This vetting process should be completed within 24 hours.

If you are not successfully vetted, contact the Open Payments Help Desk ([openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov)) for next steps. More information on vetting is available in the [Open Payments User Guide](#).

The system will indicate that you have successfully created your profile. Your profile will now undergo vetting. To determine the status of your registration, go to the “My profile” page in the Open Payments system.

Please note that you will not be able to perform activities in the system until you have been successfully vetted.

Once successfully vetted, you will be able to access your data submitted by reporting entities.

# Teaching Hospital Registration Instructions

# Before Beginning Teaching Hospital Registration

The person registering the teaching hospital must:

- **Have an EIDM user ID and password on hand**
- Have access to the Open Payments application through EIDM
- Have the required profile information available
- Assume the user role of authorized official for that teaching hospital
- Know who to nominate for the authorized official and authorized representative roles, if anyone (May have up to 10 active users for a teaching hospital, five of which can be authorized officials)
- Use Internet Explorer 8 or higher
- Use Windows, not Macintosh (Currently, the Open Payments system is optimized for the Windows platform)
- Only use the navigation buttons within the Open Payments system itself - never use the navigation buttons on your browser toolbar

# Teaching Hospital Registration Process Overview

Access the Open Payments System via the CMS Enterprise Portal



Search for Teaching Hospital Using Required Fields



Enter NPI and Business Phone Number



Confirm Your Role and Nominate Additional Individuals (optional)



Review and Submit Profile

# Step 1: Log into the Open Payments System via the CMS Enterprise Portal

## Open Payments (Sunshine Act)

### Welcome to the Open Payments System

*Note: Our records indicate you have not registered with the Open Payments reporting application before. You must create your profile in order to use the System.*



Begin by accessing the Open Payments system via the CMS Enterprise portal using your EIDM login credentials. Go to the top menu bar on the Enterprise portal screen and select the “Open Payments” tab. This takes you to the Open Payments landing page. Read the information on the page, as it provides a great deal of information about registration.

Once you've read the page, select the “Create My Profile” button, shown here.

# Step 2: Read the Create Profile Screen

## Open Payments (Sunshine Act)

Physician [Select User Type](#)

### Create Profile

1 Select Profile Type

2 Register Entity

3 Personal Information

4 Review and Submit Profile

 [Access the Open Payments User Guide](#)

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### Create Profile

To begin creating a profile and registering in the Open Payments system, you must identify a affiliation with an applicable manufacturer, applicable group purchasing organization (GPO), teaching hospital, or identify as a physician or physician's authorized representative. During the process, you will also have the ability to nominate additional authorized users or representatives.

Note: When registering, it is important that you have all required information available, as registration must be completed in one session. Also note that your session will time out after minutes of inactivity and all information inputted during that session will be lost.

The information needed to create your user profile or nominate additional authorized users or representatives includes:

- Name
- Job title
- Email address
- Business address
- Phone number

In addition to the above information for user profile creation, other information is collected during the registration process. The additional information for each type of registration is provided in sections below. Once you are ready to begin, select the "Start Profile" button.

There are three categories of registration in the Open Payments system (each of these categories is discussed in the following sections):

1. Registration for an applicable manufacturer or applicable GPO (i.e., "reporting entity")
2. Registration for a physician
3. Registration for a teaching hospital (must be part of [CMS-approved HPI](#))

#### 1. Registration for an applicable manufacturer or applicable GF (i.e., "reporting entity")

To register an applicable manufacturer or applicable GPO, you must be an authorized official within the entity, and must assume a system role of "officer" while registering the entity. An authorized official is a Chief Executive Officer, Chief Financial Officer, Chief Compliance Officer, or other "C-Suite" official of the reporting entity. You may add other roles for yourself, such as submitter and/or attester, or nominate additional users for your entity at the time of registration.

Note: If you are the authorized official for the entity who completed EIDM registration of entity during Phase 1, you may search for the entity for which you submitted Phase 1 information by following the steps given below and selecting the appropriate link on the next screen. Once you are on the associated entity profile, some of the fields are pre-populated with the data submitted in Phase 1. Begin by confirming the accuracy of the pre-populated data, then complete the remainder of the information. If the data submitted in Phase 1 is not pre-populated, it may be due to one of the following reasons:

- Data submitted during Phase 1 did not process (possibly due to errors in the submitted data).
- Data was submitted after the Phase 1 deadline; or
- Data submitted contained all 0 (zeros) or only NULL values.

Contact [openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov) for guidance if you see any other discrepancy between Phase 1 submissions and the pre-populated data fields shown in the entity.

Page continued...

#### 2. Registration for a physician

If you are a physician, you must first create your own profile. You may then nominate another user as an authorized representative during the registration process. If you are a physician's authorized representative, you may register for a physician by entering the nomination ID provided to you previously from a nomination notification email, then following the steps provided within the system.

To register for a physician the following information is needed.

A field with an asterisk (\*) is required.

- First Name \*
- Middle Name
- Last Name \*
- Suffix (Jr., Sr., etc.)
- National Provider Identifier (NPI)
- License number and license state (all states in which the physician holds an active license) \*
- Primary type (a 10-digit alphanumeric series that represents the physician's primary practice) \*
- Specialty code (a 10-digit alphanumeric series that represents the physician's specialty) \*
- Drug Enforcement Agency (DEA) Number
- Business Email Address \*
- Physician practice name (legal name of the practice)
- Physician practice business address (if multiple practice addresses, enter the primary business address) \*
- Business Telephone Number

#### 3. Registration for a teaching hospital

To register for a teaching hospital you must be an authorized official for that teaching hospital and must assume a system role of an "authorized official" during registration. You may also nominate additional users as "authorized representatives" for the teaching hospital during registration.

To register for a teaching hospital the following information is needed.

A field with an asterisk (\*) is required.

- State where the teaching hospital is located \*
- Teaching hospital name \*
- Teaching hospital address \*
- Employer Identification Number (EIN)/Taxpayer Identifier Number (TIN) \*
- National Provider Identifier (NPI) \*

**Start Profile**

After you've read this page, select "Start Profile".

Please note that if you select the "Cancel" button at any point during the registration process, all data you've entered will be lost.

Page continued...

# Step 3: Select Profile Type

## Open Payments (Sunshine Act)

### Create Profile

- Select Profile Type
- Register Entity
- Personal Information
- Review and Submit Profile

[Access the Open Payments User Guide](#)

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### Select Profile Type

Indicate whether you are affiliated with an applicable manufacturer or applicable GPO, teaching hospital, or physician to begin creating your profile. A registration ID and nomination ID may have been sent to you if you are an authorized officer of an entity or an authorized representative for a physician or teaching hospital. If you have received your registration ID and nomination ID, you may begin creating your profile by selecting the "I have a Nomination ID and Registration ID" link.

A field with an asterisk(\*) is required.

\*Required: Select the "I have a Nomination ID and Registration ID" link or the type of entity or covered recipient you are affiliated with.

Choose the type of entity or covered recipient you are affiliated with:

- Applicable Manufacturer or Applicable GPO
- Physician
- Teaching Hospital

----- OR -----

[I have a Nomination ID and Registration ID](#)

Choose the option "Teaching Hospital."

Select "Continue."

# Step 4: Select Criteria for Teaching Hospital

## Open Payments (Sunshine Act)

Create Profile

- Select Profile Type
- Teaching Hospital: Search**
- Personal Information
- Review and Submit Profile

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### 2 Teaching Hospital: Search

A field with an asterisk (\*) is required.

Search for your teaching hospital by selecting the correct information for each of the fields from the dropdown lists below. Select "Search" when you have finished making your selections in the dropdown lists.

The teaching hospital is updated annually and can also be found on the CMS Open Payments website at <http://go.cms.gov/openpayments>. If you do not find your teaching hospital listed, contact the Open Payments Help Desk ([openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov)) for guidance.

Note that only an authorized official within the teaching hospital may register a teaching hospital in the Open Payments system.

**Authorized Official:** Responsible for registering the teaching hospital in the Open Payments system. Authorized officials may nominate other users, or modify existing user roles. They are also responsible for approving/denying nominations made by others, and approving/denying requests for user roles made by others.

\* State Where Teaching Hospital is Located:  
Maryland

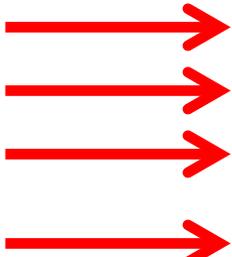
\* Teaching Hospital Legal Name:  
ABCDE Hospital

\* Teaching Hospital Business Address:  
7500 Security Blvd. Baltimore MD 21244

\* Taxpayer Identification Number (TIN):  
123456789

Search

Cancel Back



Enter information on this screen to search for the teaching hospital you wish to register in Open Payments. Required information includes the state the hospital is in, the hospital's legal name, its business address, and its taxpayer identification number, or TIN. All required fields will be marked with a red asterisk.

Select the "Search" button.

# Step 5: View Teaching Hospital Search Result

## Open Payments (Sunshine Act)

### Create Profile

✓ Select Profile Type

② Teaching Hospital: Search

③ Personal Information

④ Review and Submit Profile

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### 2 Teaching Hospital: Search

A field with an asterisk (\*) is required.

Search for your teaching hospital by selecting the correct information for each of the fields from the dropdown lists below. Select "Search" when you have finished making your selections in the dropdown lists.

The teaching hospital is updated annually and can also be found on the CMS Open Payments website at <http://go.cms.gov/openpayments>. If you do not find your teaching hospital listed, contact the Open Payments Help Desk ([openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov)) for guidance.

Note that only an authorized official within the teaching hospital may register a teaching hospital in the Open Payments system.

**Authorized Official:** Responsible for registering the teaching hospital in the Open Payments system. Authorized officials may nominate other users, or modify existing user roles. They are also responsible for approving/denying nominations made by others, and approving/denying requests for user roles made by others.

\* State Where Teaching Hospital is Located:  
Maryland

\* Teaching Hospital Legal Name:  
ABCDE Hospital

\* Teaching Hospital Business Address:  
7500 Security Blvd. Baltimore MD 21244

\* Taxpayer Identification Number (TIN):  
123456789

Search

#### Teaching Hospital Search Results

This teaching hospital is not yet registered in Open Payments system.

ABCDE Hospital  
7500 Security Blvd. Baltimore  
MD 21244  
TIN: 123456789

If you are an authorized official for the teaching hospital, you may register the teaching hospital in the Open Payments system. If not, select "Cancel" and contact an authorized official of the teaching hospital.

Cancel

Back Continue

The system will return search results on the bottom half of the screen. If the returned hospital is not the correct one, check the information entered above, make any needed corrections and search again.

Only teaching hospitals listed in the current CMS Teaching Hospital list will be listed in the Open Payments system.

The system will return a message letting you know if the teaching hospital has already been registered in Open Payments. If the teaching hospital has not yet been registered, move to the next step in this scenario by selecting "Continue."

# Step 6: View Teaching Hospital Information

## Open Payments (Sunshine Act)

### Create Profile

✓ Select Profile Type

② Teaching Hospital: Search

Register Teaching Hospital

Your Role

Nominate Roles

③ Personal Information

④ Review and Submit Profile

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## 2 Teaching Hospital: Register Teaching Hospital

A field with an asterisk (\*) is required.

Review the teaching hospital information below to ensure this is the correct teaching hospital you wish to register. Enter the additional information in order to proceed with your registration.

### Methodist Hospital

#### Business Address:

7500 Security Blvd.  
Baltimore MD 21244

#### Taxpayer Identification Number (TIN):

123456789

### Additional Information for Registration

#### \* National Provider Identifier (NPI):

1234512345

The NPI is a 10-digit number; do not use any dashes or other special characters

#### \* Teaching Hospital Business Phone Number:

555-555-5555

XXX-XXX-XXXX

Cancel

Back

Continue

Review the information displayed on the screen. Enter the teaching hospital National Provider Identifier (NPI) and the business phone number.

When complete, select "Continue."

# Step 7: Select User Role

## Open Payments (Sunshine Act)

### Create Profile

✓ Select Profile Type

② Teaching Hospital: Search

Register Teaching Hospital

Your Role

Nominate Roles

③ Personal Information

④ Review and Submit Profile



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## 2 Teaching Hospital: Your Role

A field with an asterisk (\*) is required.

To register a teaching hospital, you must have the role of authorized official of the teaching hospital.

Authorized officials are responsible for registering the teaching hospital in the Open Payments system. Authorized officials may nominate other users, or modify existing user roles. They are also responsible for approving/denying nominations made by others, and approving/denying requests for user roles made by others.

### Your Role-Related Information

Enter your personal information below.

\* First Name:

John

Middle Name:

\* Last Name:

Doe

Suffix (Jr., Sr., etc.):

\* Email Address:

teachinghospital@yopmail.com

\* Business Phone:

555-555-5555

XXX-XXX-XXXX

Cancel

Back

Continue

Make sure that when entering information into free-form text fields, you restrict your use of non-alphanumeric characters to those permitted by the system. For example, when entering the business phone number, you must include the hyphen (“-”) in the proper place within the field to pass field validation.

When complete, select “Continue.”

# Step 8: Nominate Additional Users

## Open Payments (Sunshine Act)

Create Profile

- Select Profile Type
- Teaching Hospital: Search
- Register Teaching Hospital
- Your Role
- Nominate Roles**
- Personal Information
- Review and Submit Profile

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### 2 Teaching Hospital: Nominate Roles

A field with an asterisk (\*) is required.

The Teaching Hospital can have up to 10 active authorized users in the role of authorized official or authorized representative. There can be a maximum of 5 authorized official(s) per teaching hospital. These users will be allowed to perform certain actions on behalf of the teaching hospital in the Open Payments system.

Each nominated authorized representative will receive an email notifying them of their nomination to serve as a representative for a teaching hospital. The nominee must confirm the role or reject the nomination. If the nominee accepts the role, he or she will be prompted to create an individual profile in the Open Payments system. If the nominee does not accept the role, another person may be nominated.

Note: Nominees must register in Enterprise Identity Management (EIDM) to obtain login credentials prior to accepting or rejecting the role in the Open Payments system.

#### Add Nominee

Nominations can be made now or later, by selecting "Add Nominee." You will be asked to provide the nominee's personal and contact information. A summary of the actions associated with each user role is referenced below.

The nominee will have 10 business days to accept or reject the role. After 10 business days, the nomination will be deactivated.

User Role Description:

- Authorized Official:** Responsible for registering the teaching hospital in the Open Payments system. Authorized officials may nominate other users, or modify existing user roles. They are also responsible for approving/denying nominations made by others, and approving/denying requests for user roles made by others.
- Authorized Representative:** Granted permission by the teaching hospital's authorized official to access/review data, initiate a dispute on behalf of the teaching hospital and make/approve nominations for other users.

Role:	Name:	Business Email:	Business Phone Number:	View
Authorized Official	John Doe	teachinghospital@opmail.com	555-555-5555	

**Add Nominee**

\* First Name: Jane  
Middle Name:

\* Last Name: Doe  
Suffix (Jr., Sr., etc.):

\* Email Address: teachingrep@opmail.com  
\* Business Phone Number: 555-555-5555  
303-303-3030

\* Job Title: CFO

**Indicate the role this person will have:**

**Authorized Official:** Responsible for registering the teaching hospital in the Open Payments system. Authorized officials may nominate other users, or modify existing user roles. They are also responsible for approving/denying nominations made by others, and approving/denying requests for user roles made by others.

**Authorized Representative:** Granted permission by the teaching hospital's authorized official to access/review data, initiate a dispute on behalf of the teaching hospital and make/approve nominations for other users.

Business Address:  
\* Business Address, Line 1: 7500 Security Blvd  
Business Address, Line 2:

\* City Name: Baltimore \* State: Maryland \* Zip Code: 21244  
00000 0000

**Add Nominee** **Cancel** **Back** **Continue**

If you do not wish to nominate another user, select "Continue" to move on.

If you do wish to nominate another user for a role with the teaching hospital, enter in the required information for that person. When the information is entered, select "Add Nominee." Repeat this process if you wish to nominate more people for user roles with the hospital. A teaching hospital may have up to ten active users, up to five of whom can be authorized officials.

Each nominee will receive an email notifying him or her of the nomination. The nominee must accept or reject the role.

When you have added the nominees, select "Continue."

You do not need to designate authorized representatives or officials during initial registration.

# Step 9: View All Nominees

## Open Payments (Sunshine Act)

Create Profile

- ✓ Select Profile Type
- ② Teaching Hospital: Search
- Register Teaching Hospital
- Your Role
- Nominate Roles**
- ③ Personal Information
- ④ Review and Submit Profile

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### 2 Teaching Hospital: Nominate Roles

A field with an asterisk (\*) is required.

The Teaching Hospitals can have up to 10 active authorized users in the role of authorized official or authorized representative. There can be a maximum of 5 authorized official(s) per teaching hospital. These users will be allowed to perform certain actions on behalf of the teaching hospital in the Open Payments system.

Each nominated authorized representative will receive an email notifying them of their nomination to serve as a representative for a teaching hospital. The nominee must confirm the role or reject the nomination. If the nominee accepts the role, he or she will be prompted to create an individual profile in the Open Payments system. If the nominee does not accept the role, another person may be nominated.

Note: Nominees must register in Enterprise Identity Management (EIDM) to obtain login credentials prior to accepting or rejecting the role in the Open Payments system.

#### Add Nominee

Nominations can be made now or later, by selecting "Add Nominee." You will be asked to provide the nominee's personal and contact information. A summary of the actions associated with each user role is referenced below.

The nominee will have 10 business days to accept or reject the role. After 10 business days, the nomination will be deactivated.

#### User Role Description:

- **Authorized Official:** Responsible for registering the teaching hospital in the Open Payments system. Authorized officials may nominate other users, or modify existing user roles. They are also responsible for approving/denying nominations made by others, and approving/denying requests for user roles made by others.
- **Authorized Representative:** Granted permission by the teaching hospital's authorized official to access/review data, initiate a dispute on behalf of the teaching hospital and make/approve nominations for other users.

Role:	Name:	Business Email:	Business Phone Number:	View
Authorized Official	John Doe	teachinghospital@yopmail.com	555-555-5555	
Authorized Official	Jane Doe	teachingrep@yopmail.com	555-555-5555	Delete

+ Add Nominee

Cancel

Back

Continue

Confirm the information and when complete select "Continue."

If any of the information is incorrect, select the "Back" button to return to the previous screen and make corrections.

# Step 10: Enter Personal Information

## Open Payments (Sunshine Act)

### Create Profile

✓ Select Profile Type

✓ Teaching Hospital: Search

③ Personal Information

④ Review and Submit Profile



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### 3 Personal Information

A field with an asterisk (\*) is required.

Add the requested personal and business information to your user profile. Also, review any pre-populated information for accuracy and correct any invalid information.

Note that changes made here will **not** automatically update your profile information in your other CMS accounts, such as your Medicare, National Plan & Provider Enumeration System (NPPES), or Enterprise Identity Management (EIDM) accounts.

**Your Name**

\* First Name:  \* Last Name:

Middle Name:  Suffix (Jr., Sr., etc.):

**Business Address**

\* Job Title:

\* Business Email Address:  \* Business Telephone Number:

XXX-XXX-XXXX

\* Business Address, Line 1:

Business Address, Line 2:

\* City Name:  \* State:  \* Zip Code:

XXXX XXXX

Check any pre-populated information for accuracy. Then enter information into any required fields that did not pre-populate. All required fields will be marked with a red asterisk.

When you are finished, select “Continue.”

# Step 11: Review and Submit Profile

## Open Payments (Sunshine Act)

### Create Profile

- ✓ Select Profile Type
- ✓ Teaching Hospital: Search
- ✓ Personal Information
- ④ Review and Submit Profile

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### 4 Review and Submit Profile

Review the information entered in the previous sections.

Select "Back" to navigate to the previous page(s) and correct any incorrect information. Select "Submit Profile and Register" to submit your profile.

#### Methodist Hospital

Teaching Hospital Business Address: 7500 Security Blvd.  
Baltimore MD 21244

Taxpayer Identification Number (TIN): 123456789

National Provider Identifier (NPI): 1234512345

Teaching Hospital Business Phone Number: 555-555-5555

Your Role: Authorized Official

First Name: John

Middle Name:

Last Name: Doe

Suffix (Jr., Sr., etc.):

Business Email Address: teachinghospital@yopmail.com

Business Telephone Number: 555-555-5555

Job Title: CEO

Business Address, Line 1: 7500 Security Blvd

Business Address, Line 2:

City Name: Baltimore

State: Maryland

Zip Code: 21244

#### Nominations:

Role:	First Name:	Last Name:	Business Email Address:	Business Telephone Number:
Authorized Official	John	Doe	teachinghospital@yopmail.com	555-555-5555
Authorized Official	Jane	Doe	teachingrep@yopmail.com	555-555-5555

Cancel

Back

Continue

Review the information that you've entered.

To correct any errors, select back on the bottom of the page to return to previous pages and make your corrections.

If the information is correct, select "Continue".

# On-Screen Registration Confirmation

## Open Payments (Sunshine Act)

Teaching Hospital [Switch User Type](#)

### Create Profile

- ✓ Select Profile Type
- ✓ Teaching Hospital: Search
- ✓ Personal Information
- ✓ Review and Submit Profile



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### Success Confirmed

You have successfully submitted ABCDE Hospital profile information

You may now: [Open Payments Home](#)

You will receive an email confirming a profile was successfully created for the teaching hospital. The email confirmation message will have the teaching hospital's registration ID. You can refer to the Open Payments User Guide for further information.

Note: You will not be able to take any actions related to this teaching hospital until your nomination is approved.

The system will indicate that you have successfully created your profile.

Once you've received your confirmation, you can access data submitted by reporting entities about your teaching hospital.

# General Resources Available

- [CMS Open Payments website: http://go.cms.gov/openpayments](http://go.cms.gov/openpayments)
  - FAQs
  - “[Events](#)” page: Open Payments technology-focused webinar recordings and materials, plus a schedule of upcoming webinars
  - “[Program Registration](#)” and “[Data Submission and Attestation](#)” pages: Supplemental materials, instruction documents, and other resources
  - “[Fact Sheets and User Guides](#)” page: Link to the User Guide with comprehensive information regarding the Open Payments system functionality
  - “[Teaching Hospitals](http://www.cms.gov/Regulations-and-Guidance/Legislation/National-Physician-Payment-Transparency-Program/Teaching-Hospitals.html)” page: <http://www.cms.gov/Regulations-and-Guidance/Legislation/National-Physician-Payment-Transparency-Program/Teaching-Hospitals.html>
  - “[Physician](http://www.cms.gov/Regulations-and-Guidance/Legislation/National-Physician-Payment-Transparency-Program/Physicians.html)” page: <http://www.cms.gov/Regulations-and-Guidance/Legislation/National-Physician-Payment-Transparency-Program/Physicians.html>

# General Resources Available

- Open Payments Help Desk:
  - [openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov)
  - 1-855-326-8366
    - Hours: Monday-Friday, 7:30 a.m.- 6:30 p.m. (CT)