

Open Payments System Quick Reference Guide

Enterprise Identity Management System (EIDM) Registration

January 2017

Introduction

This guide is for:

1. Users who have not previously registered in the CMS Enterprise Portal and created an Enterprise Identity Management system (EIDM) user ID. EIDM is also used in support of other CMS programs, such as the Physician Quality Reporting System (PQRS).

OR

2. CMS Enterprise Portal users who have not previously accessed the Open Payments System.

Participation in the Open Payments system requires you to be registered in both EIDM and the Open Payments system. This two-step verification process is to prevent others from using your identity fraudulently.

Prerequisites

- None

Actions

EIDM registration for Open Payments has two steps: registering in EIDM as a new user and requesting access to the Open Payments system.

Step 1: EIDM New User Registration (skip to Step 2 if you already have an EIDM User ID)

1. Go to the CMS Enterprise Portal at <https://portal.cms.gov> and select “New User Registration.”
2. Accept the Terms and Conditions of the CMS Enterprise Portal page and then select “Next” to continue. Two Terms and Conditions sections of particular importance to read are:
 - Consent to monitoring; and
 - Collection of Personal Identifiable Information or PII.

“Consent to monitoring” means that you agree to allow CMS to monitor your activity and actions performed through CMS applications while logged into the CMS Enterprise Portal, and accessed through EIDM.

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“PII” is information that can be used to uniquely identify, contact, or locate a single person, or can be used with other sources to uniquely identify a single individual. Personal information collected will be used for the purpose of verifying your identity only.

3. Enter requested personal information on the “Your Information” page. Select the “Next” button.
4. Enter an EIDM User ID and password per the guidance provided below. You will also be asked to select three challenge questions and provide answers. Select “Next” when finished.
 - Your EIDM User ID:
 - Must be a minimum of 6 and a maximum of 74 alphanumeric and allowed non-alphanumeric characters; and
 - Allowed non-alphanumeric characters are the following: dashes (-), underscores (_), apostrophes (’), at signs (@), and periods (.).
 - Your EIDM password must:
 - Be changed at least every 60 days (EIDM will prompt for a password change when the 60-day deadline approaches);
 - Be a minimum of 8 and a maximum of 20 characters;
 - Be changed no more than once per day;
 - Contain at least one uppercase letter, one lowercase letter, and one number;
 - Should contain special characters except: Question mark (?), less than (<), greater than (>), left bracket ([), right bracket (]), apostrophe (’), quotation marks (“), forward slash (/), backslash (\), and ampersand (&);
 - Not contain your User ID; and
 - Differ from your previous six passwords.

NOTE FOR INDIVIDUALS WITH FOREIGN ADDRESSES: Individuals with addresses outside of the United States can register in EIDM via the online portal, but the identity proofing must be conducted manually. Once you have entered your information into the CMS Enterprise Portal, contact the Open Payments Help Desk at openpayments@cms.hhs.gov for assistance with the manual identity proofing process.

5. Once EIDM registration is complete, select “OK” to exit and return to the CMS Enterprise Portal landing page. After selecting “OK,” you will receive an email confirmation message that contains your confirmed EIDM User ID and a link to the CMS Enterprise Portal.

After successful EIDM registration, you may proceed to Step 2, requesting access to the Open Payments system.

Step 2: Request Access to the Open Payments System

1. Go to the CMS Enterprise Portal at <https://portal.cms.gov> and select “Login to CMS Secure Portal.”
2. Read the Terms and Conditions of the CMS Enterprise Portal page and then select “I Accept” to continue.
3. Enter your EIDM User ID and select “Next.”
4. Enter your EIDM password and select “Log In.”
5. Select “Request Access Now” under “Request Access.”
6. Search for the Open Payments application by typing it into the search box at the top of the page, or by scrolling down the page until you reach “Open Payments.” Select “Request Access” under the Open Payments application box.
7. Select the appropriate “Application Description” and “Role” identifiers, then select “Submit”:
 - Under “Application Description,” select “Open Payments.”
 - Under “Role,” select “Applicable Manufacturer/GPO, Physician, or Teaching Hospital.”
8. Read the identity verification on-screen notice and select “Next” to continue.
9. Accept the terms and conditions of the identity verification and select “Next” to continue.
10. Confirm the on-screen information and verify your identity by answering the questions and select “Next” to continue.
11. View the on-screen confirmation message and proceed to the next page.
12. You will now be taken to the Multi-Factor Authentication Registration page. During the MFA registration process, you will have the option of registering a phone, computer, or email to add an additional level of security to your account. It is **not required** to complete this step to obtain access to the Open Payments system. You may also register device(s) at a later time. Refer to the “CMS Enterprise Identity Management System (EIDM) User Operations Guide,” available at <https://portal.cms.gov> for more information on the MFA process.
 - To skip this step, select “Skip MFA.” You will receive a confirmation that you have successfully gained access to the Open Payments application.
 - To register a device, select “Add MFA.” Select the device you wish to register and enter the device information when prompted. Once you have completed MFA registration,

you will receive a confirmation that you have successfully gained access to the Open Payments application. **Note: Users registering a device will be asked to provide a security code associated with their device each time they log into the EIDM portal.**

13. Log out, wait a few minutes, and log back in to view the Open Payments application.

For assistance in the event of failed identity proofing, contact Experian Proofing Support Services at 1-866-578-5409. If you still need assistance, contact the Open Payments Help Desk at openpayments@cms.hhs.gov or 1-855-326-8366.

EIDM Account Inactivity

EIDM will lock your user account if no activity is reported in the account for 60 or more days. To unlock your account, please refer to the instructions in Chapter 3 of the Open Payments User Guide.

EIDM will automatically deactivate any user that has not logged in for 180 days or more. You can contact the Open Payments Help Desk at openpayments@cms.hhs.gov, or call 1-855-326-8366 to reinstate your account after 180 days of inactivity.

Next Steps

- **Applicable manufacturer or applicable group purchasing organization (GPO)** should register your entity in the Open Payments system. If your entity has already been registered- you can accept a nomination for a user role (if you have received one), or you can nominate yourself for a user role and then get your nomination approved by the officer.
- **Physician (including principal investigators) or teaching hospital**, the next step is to register yourself in the Open Payments system

Additional Resources

All registration resources can be found on the Resources page of the CMS Open Payments website at <https://www.cms.gov/OpenPayments/About/Resources.html>.

Quick reference guides relevant to your next steps are the following:

Applicable Manufacturers/Applicable GPOs

- Applicable Manufacturer and GPO Registration and Recertification
- User Roles, Self-Nominations, and Accepting/Rejecting Nominations
- User Roles, Nominations, and Approving/Rejecting Self-Nominations

Physicians and Teaching Hospitals

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- Physician Registration
- Teaching Hospital Registration

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