Open Payments System Quick Reference Guide
Enterprise Identity Management System (EIDM) Registration
January 2019

Introduction

This guide is for:

1. Users who have not previously registered in the CMS Enterprise Portal/EIDM. 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 users to be registered in both EIDM and the Open Payments system. This two-step verification process is to prevent others from using a user's 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 the "New User Registration" button.

2. Select "Open Payments: Physician Payments Sunshine Act" from the dropdown list on the "Choose Your Application" page.

3. 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 (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.

"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.

4. Enter requested personal information on the "Register Your Information" page. Select the "Next" button. Data fields to be completed are the following:

- Name (First, Middle, Last, Suffix)

- Social Security Number (Optional)

- Birthday (Month, Date, Year)

- Is Your Address US Based (Yes/No)

- Home Address, City, State, Zip Code

- Primary Phone Number

- Email Address

- Confirm Email Address

Take care to enter your legal name, current home address, primary phone number, and email address correctly. EIDM collects personal information only to verify your identity with Experian, an external identity verification provider. If this information is not validated successfully and identity proofing fails, contact the Open Payments Help Desk at 1-855-326-8366.
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 the information has been entered into the CMS Enterprise Portal, contact the Open Payments Help Desk at openpayments@cms.hhs.gov or 1-855-326-8366 or for TTY line call 1-844-649-2766 for assistance with the manual identity proofing process.

5. Enter an EIDM User ID and password per the guidance provided below on the "Create User ID, Password & Challenge Questions" page. Users 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 characters;

  – Contain at least 1 letter;

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

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

- Cannot contain your SSN or any 9 consecutive numbers; and

- May contain the following special characters: dashes (-), underscores (_), apostrophes ('), at signs (@), and periods (.)

- User ID cannot end with special characters.

- Your EIDM password:

  - Must be changed at least every 60 days;

  - May be changed only once in a 24 hour period;

  - Must contain a minimum of 8, and maximum of 20 characters;

  - Contain at least 1 letter, 1 number and 1 special character;

  - Contain at least 1 upper case and 1 lower case letter;

  - Must be different from previous passwords used;

  - Cannot contain the User ID;

  - Cannot contain any commonly used words; and

  - The following special characters may not be used ? <> () ' " / \ &

6. On the "Registration Summary" page, review the information and make any necessary changes before submitting. Select the "Submit User" button to submit the information.

7. A "Confirmation" page is displayed acknowledging successful registration. Select the "CMS.gov Enterprise Portal" link (top left) or the "You can now login by clicking here" link to return to the CMS Enterprise Portal Home page.

After successful EIDM registration, 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 enter the CMS User ID and Password.

2. Read the Terms and Conditions of the CMS Enterprise Portal page and select the checkbox next to "Agree to our Terms and Conditions" link

3. Select the "Login" button.

4. Select "Request/Add Apps" tile on the "My Portal" page.

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5. Search for the Open Payments application on the "My Access" page by typing it into the "Access Catalog" textbox. Select the "Request Access" button once the "Open Payments" application "Request Access" tile is displayed.

6. Select a role to request access on the "Request New System Access" page.

7. Select "Applicable Manufacturer, GPO, Physician or Teaching Hospital" from the "Role" drop-down menu. Select the "Submit" button when complete.

8. Users will be taken to the "Multi-Factor Authentication (MFA) Information Registration" page. During the MFA registration process, users will have the option of registering a Phone/Tablet/PC/Laptop, Text Message Short Message Service (SMS), Interactive Voice Response (IVR), or Email to add an additional level of security to your account. This step is **not required** to obtain access to the Open Payments system. Users may also register the device(s) at a later time. Refer to the "Enterprise Portal User Manual," available at https://portal.cms.gov for more information on the MFA process.

    - To **proceed without MFA**, select "Skip MFA." Users will receive a confirmation that they have successfully gained access to the Open Payments application.

    - To register a device, select "Add MFA."

        i.   Select the device you wish to register and enter the device information when prompted.

        ii. Enter the required information for the device you are registering and select the "Next" button to continue.

        iii. You will receive a confirmation that the MFA device you entered has been successfully registered. Select the "OK" button to continue.

        iv. A confirmation screen will be displayed with a "Successful Completion!" message "Your request has successfully completed. You will need to logout and then log in to access the OPENPAYMENTS Application. Select 'OK' to continue." **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.**

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

EIDM Account Inactivity
EIDM will lock a user account if no activity is reported in the account for 60 or more days.
To unlock an account, please refer to the instructions in the "Open Payments User Guide for Reporting Entities" or "Open Payments User Guide for Covered Recipients".

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EIDM will automatically deactivate any user that has not logged in for 180 days or more. Users must call the Open Payments Help Desk at 1-855-326-8366 or TTY line call 1-844-649-2766 to reinstate an account after 180 days of inactivity.

Next Steps

- **Applicable manufacturer or applicable group purchasing organization (GPO)** users should register their entity in the Open Payments system. If an entity has already been registered, users can accept a nomination for a user role (if user has received one), or a user can nominate themselves for a user role and then get the nomination approved by an officer.

- **For physicians (including principal investigators) or teaching hospitals,** 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 include:

Applicable Manufacturers/Applicable GPOs

- Applicable Manufacturer and Applicable GPO Registration and Recertification

- Reporting Entities: User Roles, Nominations, Approving/Modifying Nominations, and Deactivating Users

- Self-Nominations and Accepting/Rejecting Nominations

Physicians and Teaching Hospitals

- Physician Registration

- Teaching Hospital Registration

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