

# Open Payments System Quick Reference Guide

## Nominating a Physician Authorized Representative and Accepting/Rejecting Nominations

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### Overview

This guide provides an overview of the access levels available for physician authorized representatives, how to nominate an individual to serve as an authorized representative, and how individuals can accept or reject a nomination to be an authorized representative.

### Prerequisites

- User is registered in CMS Enterprise Identity Management system (EIDM) and obtained access to the Open Payments system
- Physician is registered in the Open Payments system

### Actions

#### Physician Authorized Representative

A physician may have only **one 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.

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:** Able to see physician's profile and records information.(Default access level)
- **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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## Nominating 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, refer to the quick reference guide “Physician Registration,” available on the Resources page of the Open Payments website (<https://www.cms.gov/OpenPayments/About/Resources.html>).

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

## Accepting or Rejecting an Authorized Representative Nomination

If you have been nominated for the role of 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, after which the nomination request will become inactive.

1. Log in to the Open Payments system via the CMS Enterprise Portal at <https://portal.cms.gov>.
  - If you are a first-time system user, select “Create My Profile.” Select “Start Profile” at the bottom of the screen. Select the “I have a Nomination ID and Registration ID” link on the “Select Profile Type” page.
  - If you are a returning user, select the “My Profile” tab. Select “My Roles and Nominations,” then select “Accept/Reject Nominations.”
2. Select the user type “Physician” from the drop-down list and enter the nomination ID from the nomination notification email.

3. Select “Show Nomination.” Review the information. If it is incorrect, select “Cancel” to end the registration process. Contact the physician who nominated you directly and inform them of any inaccuracies so these may be corrected. If it is correct, select “Continue.”
4. If you are a first-time system user, you will be presented with physician information. Review and confirm this information. Select “Continue” to proceed.
5. 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.
6. If you are a first-time system user, enter your personal information and select “Continue.”
7. 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.”

## Next Steps

- Review data submitted for the affiliated physician, and affirm or dispute those records as appropriate.

## Additional Resources

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

Chapter 6 of the Open Payments User Guide, “Physician and Teaching Hospital Registration,” covers the registration processes in detail and provides step-by-step instructions for various scenarios.

Quick Reference Guides relevant to nominating, accepting and rejecting nominations, and your next steps include:

- Physician Registration
- Physician and Teaching Hospital Review and Dispute Process