

Open Payments Technology Webinar Series

Open Payments Registration



Center for Program Integrity
November 2013

Target Audience for this Webinar

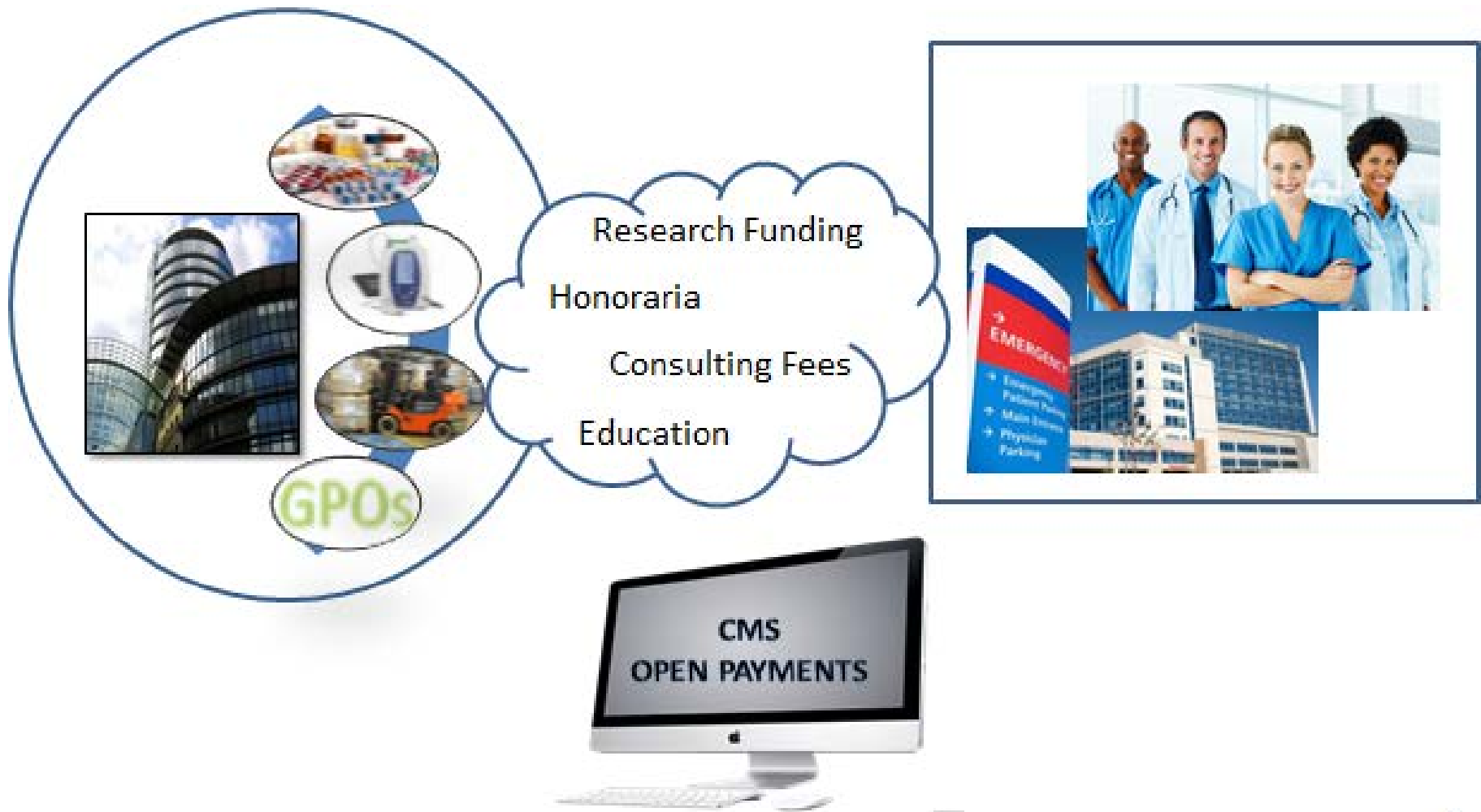
- Applicable manufacturer and applicable group purchasing organization (GPO) authorized officials and representatives responsible for Open Payments
 - Entity authorized officials (CEO, CFO, CAO, president, vice-president, etc.)
 - Compliance officers
 - Other individuals approved to represent the entity

Agenda & Learning Objectives

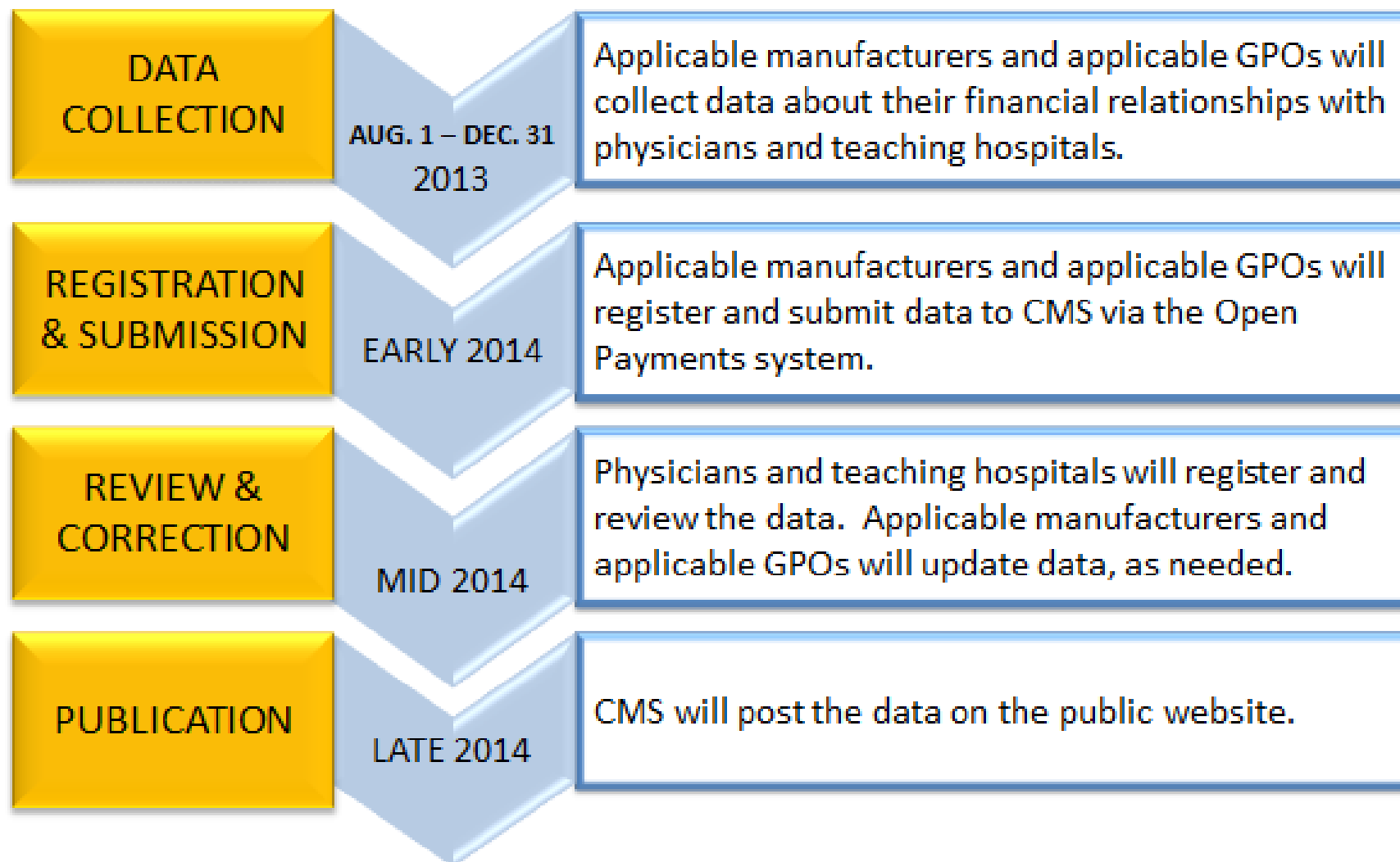
Agenda Topics	Learning Objectives
Program & System Overview	<ul style="list-style-type: none">• Obtain a high level understanding of Open Payments, the core business functions for interacting with the Open Payments system
Registration	<ul style="list-style-type: none">• Know the steps required to register in Open Payments• Know the steps entities can take and decisions entities can make now
Available Resources	<ul style="list-style-type: none">• Learn about existing resource materials and where to find them
Review and Question & Answer	<ul style="list-style-type: none">• Review the key points and gain a better understanding of the materials presented

Open Payments

Program Overview



Business Functions Overview



Open Payments Registration

Registration Overview-EIDM

Step 1

CMS Registration Enterprise Identity Management (EIDM)

- Obtain authorization and secure access to CMS business applications via EIDM

- Registration
- Authentication
- Authorization
- Identity Lifecycle Management



Step 2

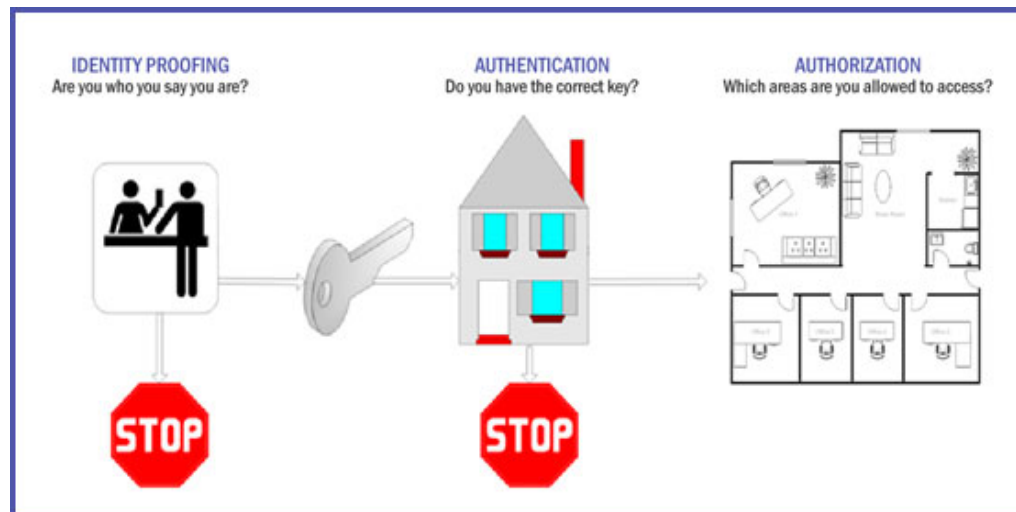
Open Payments Registration

- Obtain authorization and secure access to Open Payments



Step 1: CMS EIDM Registration

- EIDM registration is via the CMS Enterprise Portal (<https://portal.cms.gov>)
- Successful registrants will obtain an EIDM user ID and password required for accessing the Open Payments portal
- If you have used other CMS business applications, you may already have an EIDM User ID
- **We will notify users when registration in EIDM is available**



Registration Overview-Open Payments

Step 1

CMS Registration
Enterprise Identity Management (EIDM)

- Obtain authorization and secure access to CMS business applications via EIDM

- Registration
- Authentication
- Authorization
- Identity Lifecycle Management



Step 2

Open Payments Registration

- Obtain authorization and secure access to Open Payments



Step 2: Open Payments Registration

Authorized Official

Create Entity
& Self Profile

- Authorized official will create the entity and user (self) profile
- User must complete profile in one session

Vetting Entity
& Authorized
Official

- CMS Open Payments will perform vetting for the entity and the authorized official's affiliation with the entity

Registration
Confirmation



- Authorized official receives notification of successful **vetting**

What is Vetting?

- **Vetting is the process of verifying**
 - Applicable manufacturer or applicable GPO as an entity
 - Authorized Official is linked to the vetted entity
 - Authorized Official is significantly positioned to act on entity's behalf
- **Register early to allow time for vetting**
- **Successful vetting is required for successful registration**



Creating Entity and/or Self Profile

Registrants	Functions in Open Payments
Authorized Official 	<ul style="list-style-type: none">• Manage the entity in Open Payments, including registering the entity, nominating and approving the authorized representatives submitting and attesting to the data• May delegate these functions to another officer• May assume all roles within Open Payments• User vetting is required
Registering Entity 	<ul style="list-style-type: none">• Entity submitting a single or consolidated report

Information Needed for Creating the Authorized Official Profile



Individual Identifiers

First Name

Middle Name

Last Name

Name Suffix

Job Title

Business Address

Business Phone

Email Address

Information Needed for Creating the Applicable Manufacturer or Applicable GPO Profile

Entity Identifiers

Registering Entity Legal Name

Doing Business as (DBA) Name

Registering Entity Business Address

Registering Entity Business Telephone Number

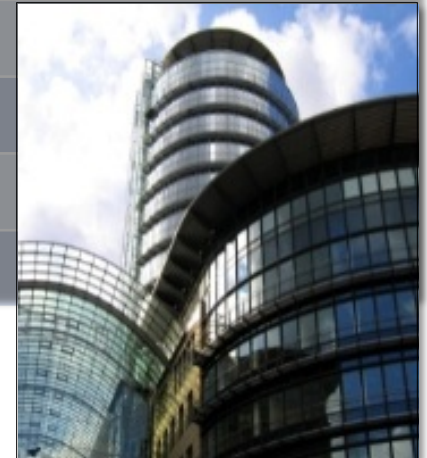
Taxpayer Identification Number(TIN)/Employer Identification Number (EIN)

D&B D-U-N-S® Number

Food and Drug Administrator (FDA) Establishment Identifier (FEI)

Uniform Resource Locator (URL) of Parent Company

Consolidated Report Indicator (Y/N) (default to N)



Assigning and Nominating Users

Registration
Confirmation

- Authorized official receives notification of successful vetting

Assigning &
Nominating
Users

- Authorized official will assign user roles to the user (self) profile or will nominate authorized representatives

Nominated User
Notification

- CMS Open Payments provides nominated users notification of authorized official's nomination and registration instructions

Assigning and Nominating Users (cont.)

For Registrants who are Authorized Representatives

Role	Functions in Open Payments
Officer Role	<ul style="list-style-type: none">• Must be an officer of the applicable manufacturer or applicable GPO; may be the Authorized Official• Must accept nomination (approval) by Authorized Official/Officer Role• Manage the entity in Open Payments• May approve other Authorized Representatives on behalf of the Authorized Official
Submitter Role	<ul style="list-style-type: none">• Not required to be an officer of the applicable manufacturer or applicable GPO• Must accept nomination (approval) by Authorized Official/Officer Role• Submits data in Open Payments on behalf of the applicable manufacturer or applicable GPO
Attester Role	<ul style="list-style-type: none">• Must be an officer of the applicable manufacturer or applicable GPO• May be the Authorized Official or Officer Role• Must accept nomination (approval) by Authorized Official/Officer Role• Attests to data in Open Payments on behalf of the applicable manufacturer or GPO

Information Needed for Nominating Officers, Attesters, & Submitters

Identifiers

First Name

Middle Name

Last Name

Name Suffix

Job Title

Business Address

Business Phone

Email Address



Open Payments Registration

Authorized Representatives

Nominated User
Notification

- Authorized representative receives notification of nomination and registration instructions

Accept
Nomination

- Authorized representative accepts nomination by completing registration
- Step 1: CMS EIDM Registration
- Step 2: CMS Open Payments Registration

Review of Learning Objectives

1. Registration is required to use the Open Payments system
2. Open Payments registration requires two steps
3. **Creating a user profile must be completed in one session**
4. Registration is not complete until the entity **AND** the authorized official have been successfully vetted
5. Supply accurate, up-to-date information **AND** include the entity's D&B D-U-N-S® Number to minimize the vetting time
6. Authorized representative must accept the nomination in order to register and obtain access in Open Payments

What You Can Do Now

- Determine or discuss user roles
 - Determine who will register the entity and approve additional representatives
 - Determine who will submit and/or attest to data on behalf of the entity
- Review the resources available on the CMS Open Payments website <http://go.cms.gov/openpayments>
- Register on CMS listserv to receive e-mail updates about the Open Payments, such as when registration will open in early 2014

Available Resources

Future Webinars

- Webinar 2:
 - *Open Payments Data Submission*
 - A high level recap of the previous webinar
 - An in-depth discussion on data submission
 - November 19, 2013 (immediately following)
- Webinar 3:
 - *Follow-up Session: Open Payments Registration and Data Submission Q&As*
 - An in-depth Q & A on data submission
 - December 3, 2013

Guidance & Educational Materials

- **Open Payments website**
<http://go.cms.gov/openpayments>
- **Open Payments webinar series**
 - “Events” page of the Open Payments website
- ***Open Payments User Guide For Industry***
 - “Program Fact Sheets and User Guide” page on the Open Payments website
 - Updated frequently to reflect new developments on Open Payments for industry users

Open Payments Support

Help Desk with technical support

- Email: OpenPayments@cms.hhs.gov
- Phone lines available in early 2014

Note: For questions regarding this webinar, reference “Data Submission Webinar” in the subject line

Communication and Outreach

- To receive periodic email updates about the Open Payments program, register with our listserv at the bottom of the <http://go.cms.gov/openpayments> page

The screenshot shows the CMS.gov website. At the top left, there are links for 'Definitions and Acronyms', 'OPEN PAYMENTS in the News', and 'Contact Us'. In the center, there is a 'Downloads' section with a link to 'Affordable Care Act Section 6002 Final Rule [PDF, 606KB]'. Below this, it says 'Page last Modified: 09/30/2013 2:02 PM' and 'Help with File Formats and Plug-Ins'. The footer contains the CMS.gov logo, a 'Home' button, and the text 'A federal government website managed by the Centers for Medicare & Medicaid Services, 7500 Security Boulevard, Baltimore, MD 21244'. On the bottom left, there are three columns of links: 'CMS & HHS Websites' (including Medicare.gov, MyMedicare.gov, StopMedicareFraud.gov, Medicaid.gov, InsureKidsNow.gov, HealthCare.gov, and HHS.gov/Open), 'Tools' (including Acronyms, Contacts, FAQs, Glossary, and Archive), and 'Helpful Links' (including Web Policies & Important Links, Privacy Policy, Plain Language, Freedom of Information Act, No Fear Act, HHS.gov, Inspector General, and USA.gov). On the bottom right, there is a 'Receive Email Updates' form with a text input field and a 'Submit' button, which is circled in red.

Q & A