



# ***Open Payments***

## **Phase 2 Physician and Teaching Hospital Registration Demo**

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

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**CREATING PUBLIC TRANSPARENCY  
INTO INDUSTRY - PHYSICIAN  
FINANCIAL RELATIONSHIPS**

**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.***

# Advisory on Dates

- Specific dates given within this webinar may no longer be current.
- Please check the Open Payments website (<http://go.cms.gov/openpayments>) for specific dates for system-related events.

# Agenda

- Target Audience and Learning Objectives
- Phase 1 and Phase 2 Registration Overview
- Open Payments System User Roles and Common Registration Scenarios
  1. Physician Registration in the Open Payments System
  2. Teaching Hospital Registration in the Open Payments System
  3. Confirming Nomination(s) and Creating an Individual Profile
  4. Teaching Hospital User Self-Nomination
  5. Approving Self-Nominations (Teaching Hospital Only)
- Next Steps and Available Resources

# Target Audience

- Physicians and teaching hospitals who wish to view and possibly dispute information submitted about them regarding payments, other transfers of value, or physician ownership or investment interests from applicable manufacturers or applicable GPOs (“reporting entities”)

# Learning Objectives

- Understanding of the registration process in the Open Payments system
- Understanding of how to nominate individuals to perform system actions on your behalf

# Phase 1 and Phase 2 Registration Overview

# 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 Open Payments system
  - Go to the [CMS Enterprise Portal \(https://portal.cms.gov\)](https://portal.cms.gov)
  - Obtain an EIDM user ID and password
  - Request access to the Open Payments system
- Review 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>



# EIDM Account Locking and Deactivation

- Locking
  - EIDM locks your account if no activity has occurred for 60 or more days
  - If your account is locked, at login the system will display the “Unlock my Account” view
  - EIDM will ask your user ID and challenge questions
  - Once answered, enter your new password in the “new password” field to unlock the account
- Deactivation
  - Account will be disabled after 180 days of inactivity
  - Contact the Open Payments Help Desk to reinstate a disabled account on 1-855-326-8366

# 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 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>

# Common Registration Scenarios

The most common scenarios are described in this webinar. A full list of scenarios and instructions can be found in the Open Payments User Guide on the Program Fact Sheets and User Guides page on the Open Payments website.

1. Physician Registration: *New registration by physician*
2. Teaching Hospital Registration: *New registration by an authorized official*
3. Confirming Nominations: *Individual registration, accepting or rejecting a nomination*
4. Teaching Hospital User Self-Nomination: *Registration by an individual to associate with a teaching hospital that has already been registered*
5. Approving Self-Nominations: *Authorized officials confirming or rejecting self-nominations*

# **1. Physician Registration in the Open Payments System**

# Definition of Physician

- For the purposes of Open Payments, a “physician” is any of the following types of professionals that are legally authorized by the state to practice, regardless of whether they are Medicare, Medicaid, or Children's Health Insurance Program (CHIP) providers:
  - Doctors of medicine or osteopathy
  - Doctors of dental medicine or dental surgery
  - Doctors of podiatric medicine
  - Doctors of optometry
  - Chiropractors
- Note: Medical residents are excluded from the definition of physicians for the purpose of this program.



# Physician Registration Overview

- Physicians may register for the Open Payments system if they wish to review and dispute any information reported about them in the Open Payments system prior to its publication
- Registration creates a profile for the physician in the Open Payments system
- All physician profiles will be vetted to ensure the physician's identity
- Vetting occurs after the physician completes and submits his or her profile in the Open Payments system
- If the physician profile is modified, it may trigger re-vetting

# Physician Registration Overview (cont.)

- Physicians will be vetted using profile information including:
  - Business address
  - National Provider Identifier (NPI)
  - Drug Enforcement Agency (DEA) number
  - State license information
- Vetting may take up to 24 hours
- Provide as much information as possible, as more information speeds vetting and ensures all records associated with you will be matched to your profile
- Vetting must be successful in order for the physician to perform any system actions within the Open Payments system

# Physician Registration Overview (cont.)

- One authorized representative can be nominated
- Registration must be completed in one sitting (there is no option to save and return at a later time)
- Not all registration fields are required

# Physician Vetting

- To check vetting status, visit the “My Profile” page in the Open Payments system—you will not receive an email notification
- Physicians may update their profiles and resubmit as many times as needed
- Physicians must ensure to enter valid state license information
  - If **incorrect** or **no** license information is entered, and no NPI is entered, the physician may not be able to review or perform actions on certain records – without NPI, physicians can perform actions only on record(s) associated with state licenses that have been entered and verified to be accurate
- If vetting remains unsuccessful, physicians should contact the Open Payments Help Desk for assistance ([openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov))

# Fields for Physician Registration Profile

**Required and Optional Fields for Physician Profiles Table**

Fields	Required	Optional
Practice Name		X
Practice Business Address	X	
Physician Primary Type	X	
National Provider Identifier (NPI)		X
Drug Enforcement Administration (DEA) Number		X
Primary Specialty Code	X	
License State (at least 1)	X	
License Number (at least 1)	X	

NPIs can be found on the [NPI Registry](https://npiregistry.cms.hhs.gov/NPPIRegistryHome.do) at:

<https://npiregistry.cms.hhs.gov/NPPIRegistryHome.do>

DEA numbers can be obtained by contacting [the DEA Office of Diversion Control](https://www.dea.gov/diversion-control):

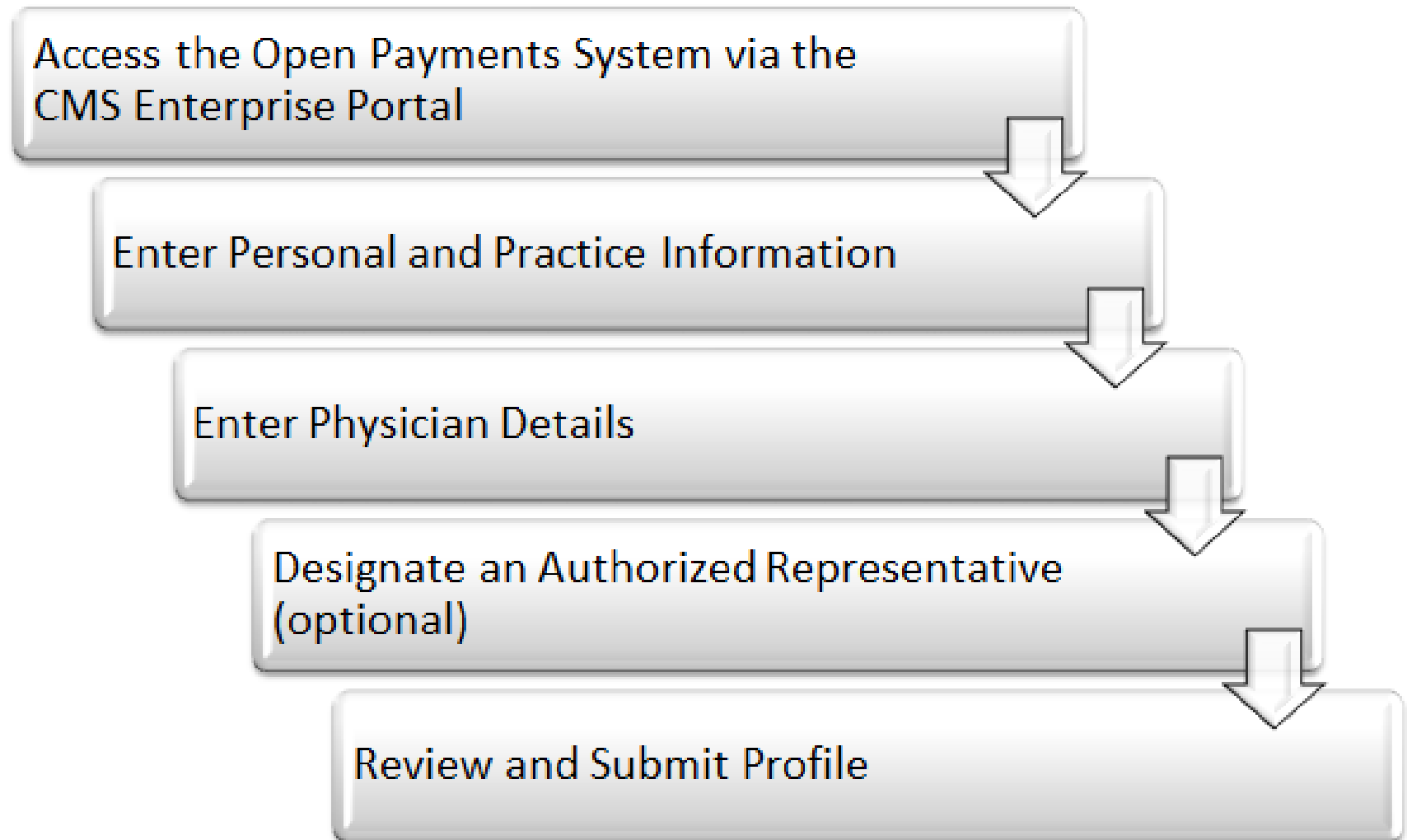
<https://www.dea.gov/diversion-control>

# Fields for User Profile

**Required and Optional Fields for Individual User Profiles Table**

Fields	Required	Optional
First Name	X	
Middle Name		X
Last Name	X	
Name Suffix		X
Job Title		X
Business Address	X	
Business Phone Number	X	
Business Email Address	X	

# Physician Registration Process Overview



# 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 15 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)



# Before Beginning Physician Registration (cont.)

The person registering must:

- Study the levels of access for authorized representative and determine who will fill the role and what levels of access you will grant them
- Be sure to use Internet Explorer 8 or higher
- Only use the navigation buttons within the Open Payments system itself—never use the navigation buttons on your browser toolbar

# Physician Registration Instructions

# 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.*



# Step 2: Read the Create Profile Screen

**Open Payments (Sunshine Act)**

**Create Profile**

To create a profile, you must first create a profile for your organization. This profile will be used to track your organization's payments and disclosures. You will need to provide information about your organization, including its name, address, and contact information. You will also need to provide information about your organization's financial activities, including its revenue, expenses, and assets. Once you have created your organization's profile, you can then create a profile for yourself. This profile will be used to track your personal payments and disclosures. You will need to provide information about yourself, including your name, address, and contact information. You will also need to provide information about your personal financial activities, including your income, expenses, and assets. Once you have created your profile, you can then view and manage your organization's and your own payments and disclosures.

**Organization Information**

Organization Name:

Address:

City:

State:

Zip:

Phone:

Fax:

Website:

**Financial Information**

Revenue:

Expenses:

Assets:

**Personal Information**

Name:

Address:

City:

State:

Zip:

Phone:

Fax:

Website:

**Next Steps**

1. Review your organization's profile information.

2. Review your personal profile information.

3. Click the "Start Profile" button to complete the process.

**Start Profile**



# Step 3: Select Profile Type

## Open Payments

Physician [Switch User Type](#)

Home

Payments  
View, Edit, Report (Transfer of Value)

Manage Physicians  
Register, Edit, Nominate Roles

My Profile  
Account, Roles, Notifications

Help


### 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

## 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

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# Step 4: Enter Personal Information

## Open Payments (Sunshine Act)

Physician: [Dashboard](#)

Home

Review and Update  
Review, Edit, Update

My Profile  
Account, Profile, Notifications

Help

Create Profile

✓ Select Profile Type

Personal Information

Physician Details

Authorized Representative

Review and Submit Profile

?

Need help with the website?  
Contact Us by email

📖

Access the Open Payments User Guide

### 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 to your other CMS accounts, such as Medicare, National Plan & Provider Enumeration System (NPDES), or Enterprise Identity Management (EIDM) accounts.

Your Name

\*First Name:  
John

Middle Name:

\*Last Name:  
Doe

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:  
physician@yopmail.com

\*Business Telephone Number:  
555.555.5555  
555.555.5555

Physician Practice Name:

Physician Practice Business Address  
\*Practice Business Address, Line 1:  
1500 Security Blvd  
Practice Business Address, Line 2:

\*City Name:  
Baltimore

\*State:  
Maryland

\*Zip Code:  
21244

Cancel

Back

Continue

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# Step 5: Enter Physician Details

## Open Payments (Sunshine Act)

Physician [Go Back](#) [User Type](#)

[Home](#)[Review and Complete](#)[My Profile](#)[Help](#)

Create Profile

✓ Select Profile Type

⚙ Personal Information

⚙ **Physician Details**

⚙ Authorized Representative

⚙ Review and Submit Profile

?

Need help with the website?  
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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):

1234567890

This NPI is a 10-digit number. It includes any dashes or other special characters.

Drug Enforcement Administration (DEA) Number:

A12345678

This DEA number is a 9-digit number. It includes 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 "specialty codes."

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

\* Physician Specialty Code:

25.0000000

+ ADD SPECIALTY CODE

#### State Licensing Information

Enter at least 1 and up to 10 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
New York	1234567890	<div>✖</div> <div>✚</div>

+ ADD LICENSE

Cancel

Back

Continue

## Step 6: Nominate Representative (optional)

[illegible]



# Step 7: Review and Submit Profile

## Open Payments (Sunshine Act)

Physician: Joseph J. Smith, MD

[Home](#)[Review and Submit Profile](#)[My Profile](#)[Help](#)

### Create Profile

- ☒ Select Profile Type
- ☒ Personal Information
- ☐ Physician Details
- ☐ Authorized Representative
- ☒ Review and Submit Profile
- ☐ Need help with the website? Contact Us by Email
- ☐ 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 page(s) to correct any invalid information. Select "Submit Profile" to submit your profile.

#### Personal Information

Name: [Redacted]  
Job Title: [Redacted]  
Business Email Address: [Redacted]  
Business Telephone Number: [Redacted]  
Physician Practice Name: [Redacted]  
Physician Practice Business Address:  
100 Security Blvd  
Baltimore, Maryland 21204

#### Physician Information

Physician Primary Type: [Redacted]  
National Provider Identifier (NPI): [Redacted]  
Drug Enforcement Administration (DEA) Number: [Redacted]  
Specialty Codes:  
1 (Internal Medicine), 2 (Internal Medicine), 3 (Family Medicine)  
State License:  
License Number: [Redacted]  
License State: [Redacted]  
Physician's Authorized Representative:  
Authorized Representative:  
Job Title: [Redacted]  
Business Email Address: [Redacted]  
Business Telephone Number: [Redacted]  
Job Title: [Redacted]  
Business Address:  
100 Security Blvd  
Baltimore, MD 21204  
Business Hours:  
Monday - Friday (9am - 5pm)  
Last Modified: [Redacted]  
Source Date: [Redacted]

[Cancel](#)[Back](#)[Submit](#)

# On-Screen Confirmation

## Open Payments (Sunshine Act)

Physician [Switch User Type](#)

### Create Profile

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



Need help with the website?  
Contact Us by email.



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](#).

## **2. Teaching Hospital Registration in the Open Payments System**

# Definition of Teaching Hospital

- For the purposes of Open Payments, “teaching hospitals” are hospitals that received payment for Medicare direct graduate medical education (GME), inpatient prospective payment system (IPPS) indirect medical education (IME), or psychiatric hospital IME programs during the last calendar year for which such information is available.

# Teaching Hospital Registration Overview

- Teaching hospitals may register in the Open Payments system if they wish to review and dispute any **information reported about the hospital** by reporting entities prior to its publication
- Teaching hospitals must be selected from a prepopulated list in Open Payments
- You may nominate other individuals as authorized representatives and authorized officials
- Teaching hospitals can have up to 10 individuals associated with them in Open Payments, including five authorized officials

# Fields for Teaching Hospital Registration

Required and Optional Fields for Teaching Hospital Profiles Table

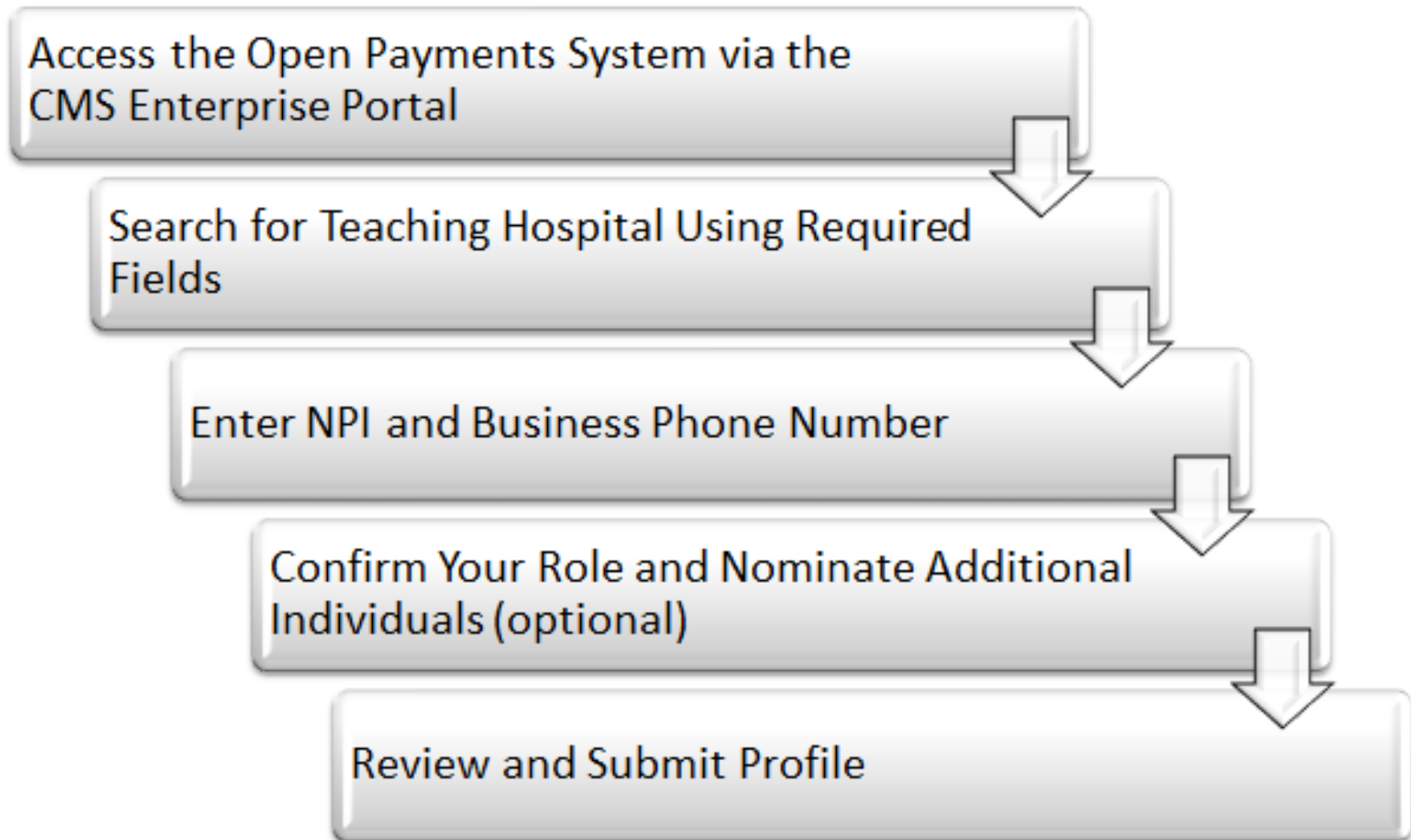
Fields	Required	Optional
State Where Teaching Hospital is Located	X	
Teaching Hospital Name	X	
Teaching Hospital Address	X	
Taxpayer Identifier Number (TIN)/ Employer Identification Number (EIN)	X	
National Provider Identifier (NPI)	X	
Teaching Hospital Business Phone Number	X	

# Fields for User Profile

**Required and Optional Fields for Individual User Profiles Table**

Fields	Required	Optional
First Name	X	
Middle Name		X
Last Name	X	
Name Suffix		X
Job Title	X	
Business Address	X	
Business Phone Number	X	
Business Email Address	X	

# Teaching Hospital Registration Process Overview





# Before Beginning Teaching Hospital Registration

The person registering the teaching hospital must:

- **Have 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
- Only use the navigation buttons within the Open Payments system itself - never use the navigation buttons on your browser toolbar

# Teaching Hospital Registration Instructions

# 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.*



# Step 2: Read the Create Profile Screen

**Open Payments (Sunshine Act)**

**Create Profile**

**1. Personal Information**

First Name  
Last Name  
Email  
Phone  
Address  
City  
State  
Zip  
Country

**2. Professional Information**

Organization  
Title  
Address  
City  
State  
Zip  
Country

**3. Contact Information**

Address  
City  
State  
Zip  
Country

**4. Additional Information**

Other Organizations  
Other Titles  
Other Addresses  
Other Cities  
Other States  
Other Zips  
Other Countries

**5. Privacy Settings**

Public Profile  
Public Contact Information  
Public Organization Information  
Public Address Information  
Public City Information  
Public State Information  
Public Zip Information  
Public Country Information

**6. Terms and Conditions**

I agree to the terms and conditions of the Open Payments (Sunshine Act) program.

**7. Submit**

**Start Profile**

# Step 3: Select Profile Type

## Open Payments (Sunshine Act)

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?  
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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](#)

Cancel

Continue

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# Step 4: Select Criteria for Teaching Hospital

## 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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🔗 Access the Open Payments User  
Guide

### 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:

ASCDE Hospital

\* Teaching Hospital Business Address:

7500 Security Blvd. Baltimore MD 21244

\* Taxpayer Identification Number (TIN):

123456789

Search

Cancel

Back

# Step 5: View Teaching Hospital Search Result

## Open Payments (Sunshine Act)

### Create Profile

Select Profile Type

Teaching Hospital Search

Personal Information

Review and Submit Profile

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Guide

### 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 drop-down lists below. Select "Search" when you have finished making your selections in the drop-down lists.

The teaching hospital is updated annually and can also be found on the OMS Open Payments website at <http://ops.oma.gov/openpayments>. If you do not find your teaching hospital listed, contact the Open Payments Help Desk: [openpayments@oma.ohio.gov](mailto:openpayments@oma.ohio.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:

ABCD 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.

ABCD Hospital  
7500 Security Blvd, Baltimore  
MD 21244  
TN: 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

Go

Create

# Step 6: View Teaching Hospital Information

## 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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➔

Account  
Guide

### 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

(00) 000-0000

Cancel

Back

Continue

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# 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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↩ Access the Open Payments User Guide

### 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:	Middle Name:
John	
*Last Name:	Suffix (Jr., Sr., etc.):
Do	
*Email Address:	*Business Phone:
teachinghospital@yahoo.com	555-555-5555
XXX-XXX-XXXX	

Cancel

Back

**Continue**

## Step 8: Nominate Additional Users

[illegible]

# Step 9: View All Nominees

## 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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Access the Open Payments User  
Guide

### 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 (EIM) 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/view 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@gmail.com	555-555-5555	
Authorized Official	Jane Doe	teachingrep@gmail.com	555-555-5555	Delete

• Add Nominee

Cancel

Back

Continue

# Step 10: Enter Personal Information

## Open Payments (Sunshine Act)

### Create Profile

✓ Select Profile Type

✓ Teaching Hospital Search

➡ Personal Information

⌂ Review and Submit Profile

? Need help with the website?  
Contact Us by email.

📖 Access the Open Payments User  
Guide

### 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 (NPPEL) or Enterprise Identity Management (EIDM) accounts.

#### Your Name

\* First Name:

John

\* Last Name:

Doe

Middle Name:

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

#### Business Address

\* Job Title:

CEO

\* Business Email Address:

teachinghospital@gmail.com

\* Business Telephone Number:

555-555-5555

555-555-5555

\* Business Address, Line 1:

7000 Security Blvd

Business Address, Line 2:

\* City Name:

Baltimore

\* State:

Maryland

\* Zip Code:

21244

5000

5000

Cancel

Back

Create

# 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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Guide

### 4 Review and Submit Profile

Review the information entered in the previous sections.

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

#### Methodist Hospital

Teaching Hospital Business Address: 1500 Security Blvd  
Baltimore MD 21204

Teaching Hospital Identification Number (TIN): 123456789

National Provider Identifier (NPI): 1234567890

Teaching Hospital Business Phone Number: 800-555-5555

Your Role: Authorized Official

First Name: John

Middle Name:

Last Name: Doe

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

Business Email Address: john.doe@methodist.com

Business Telephone Number: 800-555-5555

Job Title: CEO

Business Address, Line 1: 1500 Security Blvd

Business Address, Line 2:

City Name: Baltimore

State: Maryland

Zip Code: 21204

#### Nominations:

Role	First Name	Last Name	Business Email Address	Business Telephone Number
Authorized Official	John	Doe	john.doe@methodist.com	800-555-5555
Authorized Official	John	Doe	john.doe@methodist.com	800-555-5555

Cancel

Back

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



Need help with the website?  
[Contact Us](#) by email.



[Access the Open Payments User Guide](#)

### 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.

### **3. Confirming Nomination(s) and Creating an Individual Profile**

# Confirming Nominations & Individual Profile Overview

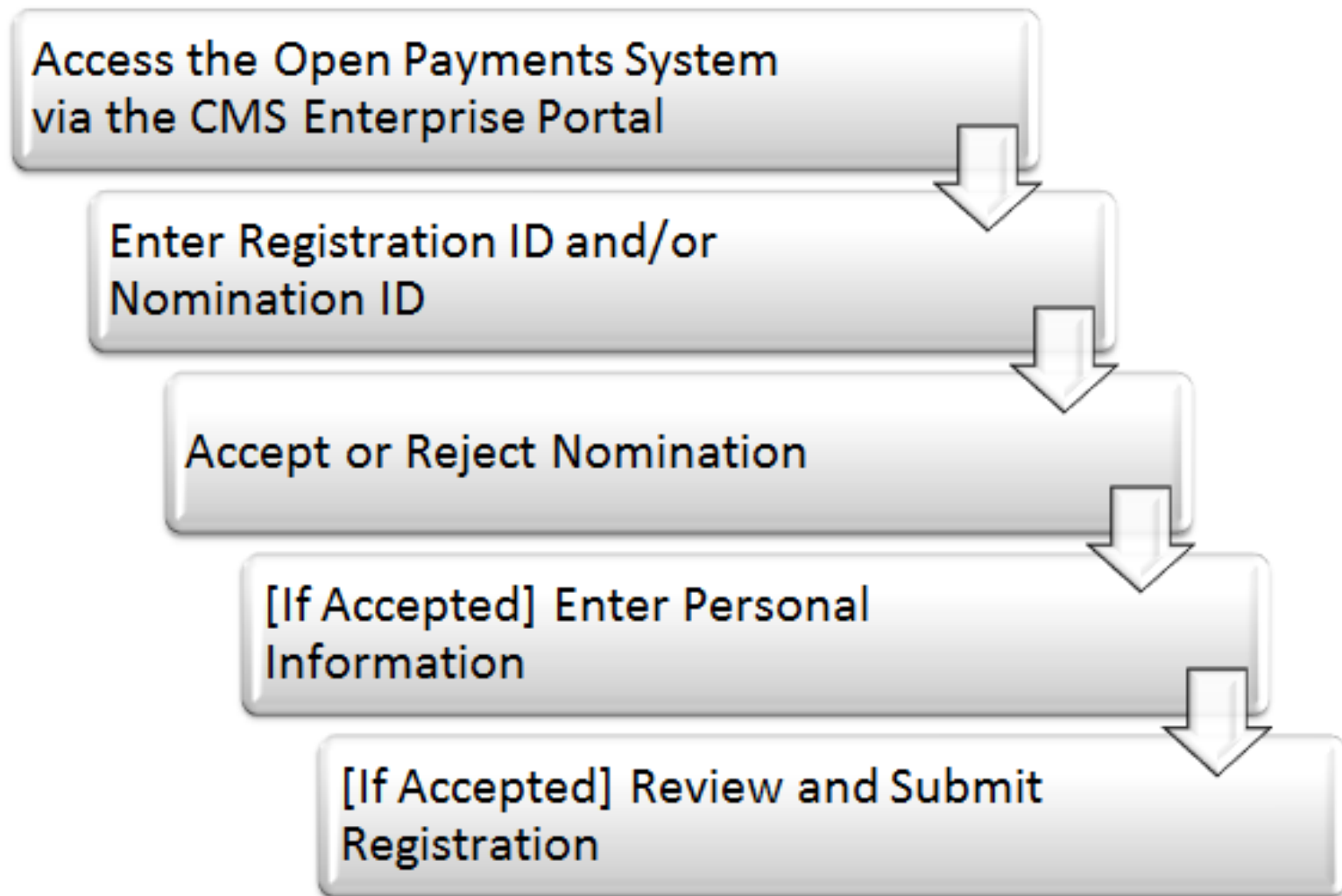
- Occurs when an individual has been nominated by a physician or teaching hospital to fill a user role in the system
- Physician authorized representative nominees will receive an email containing a system-generated nomination ID
- Teaching hospital nominees will receive an email containing a system-generated registration ID and a nomination ID
- Use these IDs to log into the system and accept or reject the nomination
- Nominees must accept or reject the nomination within 10 business days
- EIDM registration is required prior to Open Payments system registration



# Before Confirming Nominations

- Have the nomination ID and (if nomination is for a teaching hospital) registration ID on hand
- **Have your EIDM user ID and password on hand**
- Make sure you have access to the Open Payments system
- Be sure to use Internet Explorer 8 or higher
- Only use the navigation buttons within the Open Payments system itself - never use the navigation buttons on your browser toolbar

# Confirming Nominations Process



# **Confirming Physician Nomination & Creating an Individual Profile Instructions**

# Nomination Notification Email

## Open Payments System Action Required - Physician Authorized Representative Nomination

From: openpaymentsnotification@cms.hhs.gov

Date: 2014-07-03 10:13

Encoding: English ▼

You have been nominated in the Open Payments system as an authorized representative for the physician listed below. As a physician's authorized representative, you are able to perform certain functions in the Open Payments system on behalf of the physician. The functions you may perform are specified under your access level listed below.

- Physician: physician@yopmail.com
- Nomination ID: 184845703651
- Access level: Review Data (Read-Only), Edit Physician profile

You have 10 business days to accept or reject this nomination. If no action is taken, the nomination will be deactivated after 10 days.

To accept your nomination, you must register yourself in the Open Payments system. Prior to registering in the Open Payments system, you must first register for the CMS Enterprise Identity Management system (EIDM). To register in EIDM:

1. Access EIDM on the CMS Enterprise portal at <https://portal.cms.gov>.
2. Select the "New User Registration" hyperlink to create an account on EIDM and follow the on-screen instructions.

Once you are registered with EIDM, or if you already have registered with EIDM, you can register with Open Payments through the following steps:

1. Access the CMS Enterprise portal at <https://portal.cms.gov>.
2. Log in by entering your user name and password.
3. Click on "Open Payments."
4. Click on "Search Nominations."
5. Enter your Nomination ID and then click "Submit."
6. Continue through physician information to either accept/reject the nomination.

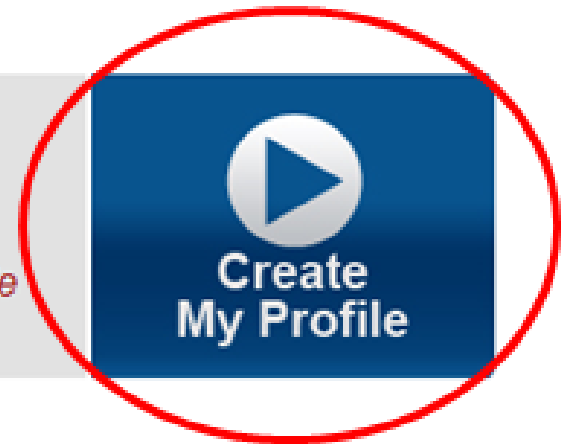
If you have any questions or concerns you can contact us by email at [openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov) or by telephone at 855-326-8366. If you would like more information about the program, please visit the Open Payments website at <http://go.cms.gov/openpayments> or our existing Frequently Asked Questions. Do not reply to this automatically generated email.

# 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.*



## Step 2: Read the Create Profile Screen




## Start Profile


# Step 3: Select Profile Type

Home	Review and Dispute Review, Dispute	Manage Teaching Hospitals Register, Edit, Nominate Roles	My Profile Account, Roles, Notifications	Help
------	---------------------------------------	---	---	------

### Create Profile

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

 Access the Open Payments User Guide

 Need help with the website?  
Contact Us by email

## 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

# Step 4: Select User Type and Enter Nomination ID

## Open Payments (Sunshine Act)

Create Profile

✓ Select Profile Type

② Register Entity

Search Nomination

Entity Information

Confirm Nomination

③ Personal Information

④ Review and Submit Profile

Access the Open Payments User Guide

Need help with the website?  
Contact Us by email

Enter Registration & Nomination ID

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

\* User Type

Physician

\* Nomination ID:

184845703651

The ID is a 12-digit number

Show Nomination

Cancel



# Step 5: View Results

## Open Payments (Sunshine Act)

Create Profile

✓ Select Profile Type

② Register Entity

Search Nomination

Entity Information

Confirm Nomination

③ Personal Information

④ Review and Submit Profile

Access the Open Payments User Guide

Need help with the website?  
Contact Us by email

Enter Registration & Nomination ID

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

\* User Type

Physician

\* Nomination ID:

184845703651

The ID is a 12-digit number

Show Nomination

Jane Doe was nominated as Authorized Representative for:

Physician Information: Jane Doe

If this is correct, click the "Continue" button.

Cancel

Continue

65

# Step 6: Confirm Physician Information

## Open Payments (Sunshine Act)

**Create Profile**

- Select Profile Type
- Confirm Physician**
- Confirm Nomination
- Authorized Representative
- Review and Submit Profile

Need help with the website?  
Contact Us by email.

Access the Open Payments User Guide

### Confirm Physician Information

Below is the information for your selected physician. Review and confirm the Physician identified below is correct. Select "Continue" to begin creating your user profile.

**Personal Information**

First Name:	Last Name:
Jane	Doe
Business Telephone Number:	Business Email Address:
555-555-5555	physician@openpayments.com

Physician Practice Name:  
Practice Business Address, Line 1: 7500 Security Blvd  
Practice Business Address, Line 2:  
City Name: Baltimore  
State: MD  
Zip Code: 21244

**Physician Information**

Physician Primary Type: Medical Doctor  
National Provider Identifier (NPI): 234567890  
Drug Enforcement Administration (DEA) Number:

**Physician Specialty Codes**

Specialty Codes:
202C00000H

**State Licensing Information**

License State:	License Number:
Maryland	1234567890

[Cancel](#)[Back](#)[Continue](#)

# Step 7: Accept or Reject Nomination

## Open Payments (Sunshine Act)

Create Profile

✓ Select Profile Type

✓ Confirm Physician

③ Confirm Nomination

④ Authorized Representative

⑤ Review and Submit Profile

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Guide

### Confirm Nomination

You have been nominated for Authorized Representative Role.

Jane

Review, accept or reject your nominated role(s). Select "Continue" button to review and complete your user profile.

Confirm Nominations:

Authorized Representative ☒ Yes, I accept ☐ No, I do not accept

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 GPO). Also able to dispute reported payments or other transfers of value, ownership, and investment interests.

Cancel

Back

Continue

# Step 8: Enter Personal Information

## Open Payments (Sunshine Act)

### Create Profile

✓ Select Profile Type

✓ Confirm Physician

✓ Confirm Information

⌚ Authorized Representative

⌚ Review and Submit Profile



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Guide

### Physician: Authorized Representative

\* Field with an asterisk (\*) is required.

#### Authorized Representative

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

\* Authorized Representative's First Name:

Jane

Mobile Name:

\* Authorized Representative's Last Name:

Doi

Julia (Dr., Sr., etc.)

\* Business Email Address:

physicianrep@openmail.com

\* Business Telephone Number:

555-555-5555

555-555-5555

\* 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:

1000 Security Blvd

Business Address, Line 2:

\* City Name:

Baltimore

\* State:

Maryland

\* Zip Code:

21244

00000

00000

Cancel

Back

Confirm

# Step 9: Review and Submit Profile

## Open Payments (Sunshine Act)

### Create Profile

- ✓ Select Profile Type
- ✓ Confirm Physician
- ✓ Confirm Nomination
- ✓ Authorized Representative
- 5 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 "Continue" to submit your profile.

#### Authorized Representative Information

First Name: Jane Last Name: Doe  
Middle Name: Suffix (Jr., Sr., etc.):  
Business Telephone Number: 555-555-5555  
Business Email Address: physicianrep@yopmail.com  
Job Title: Office Manager  
Practice Business Address, Line 1: 7500 Security Blvd  
Practice Business Address, Line 2:  
City Name: Baltimore State: MD  
Zip Code: 21244

Cancel

Back

Submit

# On-Screen Confirmation

## Open Payments (Sunshine Act)

Physician [Switch User Type](#)

### Create Profile

- ✓ Select Profile Type
- ✓ Confirm Physician
- ✓ Confirm Nomination
- ✓ Authorized Representative
- ✓ Review and Submit Profile



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[Access the Open Payments User Guide](#)

## You have successfully created your profile, Jane Doe

You may now:

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

# **Confirming Teaching Hospital Nomination & Creating an Individual Profile Instructions**

# Nomination Notification Email

## Open Payments System Action Required - Nomination for Authorized Representative for Teaching Hospital in Op...

From: openpaymentsnotification@cms.hhs.gov

Date: 2014-07-03 11:28

Encoding: English

You have been nominated in the Open Payments system for the following user role for the below teaching hospital:

- Teaching hospital: ABCDE Hospital
- Registration ID: 100000000019
- Nomination ID: 786049438133
- List of role of the user roles: Authorized Official

You have 10 business days to accept or reject the nomination for this role in the Open Payments system. Your nomination will be deactivated if you do not register in Open Payments and accept or reject your nomination within 10 business days of this message.

To accept your nomination, you must register yourself in the Open Payments system. Prior to registering in the Open Payments system, you must first register for the CMS Enterprise Identity Management system (EIDM). To register in EIDM:

1. Access EIDM on the CMS Enterprise portal at <https://portal.cms.gov>.
2. Select the "New User Registration" hyperlink to create an account on EIDM and follow the on-screen instructions.

Once you are registered with EIDM, or if you already have registered with EIDM, you can register with Open Payments through the following steps:

1. Access the CMS Enterprise portal at <https://portal.cms.gov>.
2. Log in by entering your user name and password.
3. Access the Open Payments system.
4. Continue to "Select Profile Type" page
5. Click on I have Nomination ID and Registration ID
6. Select Teaching Hospital from the list
7. Enter the teaching hospital's registration and nomination ID you received via email, and click "Show Nomination."
8. Confirm the teaching hospital information and continue through to either accept/reject the nomination.

If you have any questions or concerns you can contact us by email at [openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov) or by telephone at 855-326-8366. If you would like more information about the program, please visit the Open Payments website at <http://go.cms.gov/openpayments> or our existing Frequently Asked Questions. Do not reply to this automatically generated email.



# 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.*



# Step 2: Read the Create Profile Screen

**Open Payments (Sunshine Act)**

**Create Profile**

By creating a profile, you will be able to track and report your open payments. This is a required step for all providers who have received an open payment. The profile will be used to generate your annual report and to provide transparency to the public.

Before you can create a profile, you must first create a user account. If you have not done so, please click on the "Create Account" link in the top right corner of the page.

Once you have created a user account, you will be able to create a profile. The profile will be used to generate your annual report and to provide transparency to the public.

**Registration for a provider**

Registration for a provider is required for all providers who have received an open payment. The registration process involves providing information about your practice, including your name, address, and contact information. Once you have completed the registration process, you will be able to create a profile.

**Registration for a physician**

Registration for a physician is required for all physicians who have received an open payment. The registration process involves providing information about your medical license, including your name, address, and contact information. Once you have completed the registration process, you will be able to create a profile.

**Registration for a healthcare organization**

Registration for a healthcare organization is required for all healthcare organizations that have received an open payment. The registration process involves providing information about your organization, including your name, address, and contact information. Once you have completed the registration process, you will be able to create a profile.

**Next**

**Start Profile**

# Step 3: Select Profile Type

Home

Review and Dispute  
Review, Dispute

Manage Teaching Hospitals  
Register, Edit, Nominate Roles

My Profile  
Account, Roles, Notifications

Help


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

## 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

# Step 4: Enter Registration ID and Nomination ID

## Open Payments (Sunshine Act)

Create Profile

✓ Select Profile Type

② Register Entity

**Search Nomination**

Entity Information

Confirm Nomination

③ Personal Information

④ Review and Submit Profile

Access the Open Payments User Guide

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### Enter Registration & Nomination ID

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

\* User Type

Teaching Hospital

\* Registration ID:

100000000019

The ID is a 12-digit number

\* Nomination ID:

786049438133

The ID is a 12-digit number

Show Nomination

Cancel

# Step 5: View Results

## Open Payments (Sunshine Act)

### Create Profile

✓ Select Profile Type

② Register Entity

Search Nomination

Entity Information

Confirm Nomination

③ Personal Information

④ Review and Submit Profile



Access the Open Payments User Guide



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### Enter Registration & Nomination ID

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

\* User Type

Teaching Hospital



\* Registration ID:

100000000019

The ID is a 12-digit number

\* Nomination ID:

786049438133

The ID is a 12-digit number

Show Nomination

Jane was nominated as Authorized Official for: ABCDE Hospital

Cancel

Continue

# Step 6: Accept or Reject Nomination

## Open Payments (Sunshine Act)

### Create Profile

✓ Select Profile Type

② Teaching Hospital Search

✓ Search Nomination

Confirm Nomination

③ Personal Information

④ Review and Submit Profile



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Access the Open Payments User  
Guide

### Confirm Nomination

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

Review the teaching hospital information below to ensure this is the teaching hospital you wish to affiliate with. Accept or reject your nominated role(s) by selecting the corresponding radio button below. Select "Continue" to review and complete your user profile.

#### ABCDE Hospital

7500 Security Blvd  
Baltimore MD 21244

Taxpayer Identification Number (TIN): 12345678

NPI: 1234567890

Business Telephone Number: 555-555-5555

#### Confirm Nominations:

- **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.

#### \* Authorized Official

- ☒ Yes, I accept
- ☐ No, I do not accept

Cancel

Back

Continue

# Step 7: Enter Personal Information

## Open Payments (Sunshine Act)

Create Profile

✓ Select Profile Type

✓ Tracking Hospital Search

③ Personal Information

④ Review and Submit Profile

?

Need help with the website?  
Contact us by email.

➔

Access the Open Payments User  
Guide

### 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 (NPES), or Enterprise Specialty Management (ESM) accounts.

#### Your Name

\* First Name:  
Jane

\* Last Name:  
Doe

Middle Name:

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

#### Business Address

\* Job Title:  
CEO

\* Business Email Address:  
trachampnp@gmail.com

\* Business Telephone Number:  
555-555-5555  
000-000-0000

\* Business Address, Line 1:  
7500 Security Blvd

Business Address, Line 2:

\* City Name:  
Baltimore

\* State:  
Maryland

\* Zip Code:  
21244

Cancel

Back

Confirm

79

# Step 8: Review and Submit Profile

## Open Payments (Sunshine Act)

### Create Profile

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

? Need help with the website?  
Contact Us by email

Access the Open Payments User  
Guide

### 4 Review and Submit Profile

Review the information entered in the previous sections.

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

#### ABCDE Hospital

Teaching Hospital Business Address:	1234 Security Blvd. Baltimore MD 21244
Taxpayer Identification Number (TIN):	123456789
National Provider Identifier (NPI):	1234567890
Teaching Hospital Business Phone Number:	888-555-0000
Your Role:	Authorized Official
First Name:	John
Middle Name:	
Last Name:	Doe
Suffix (Jr., Sr., etc.):	
Business Email Address:	teaching@abc.com
Business Telephone Number:	888-555-0000
Job Title:	CFO
Business Address, Line 1:	1234 Security Blvd
Business Address, Line 2:	
City Name:	Baltimore
State:	Maryland
Zip Code:	21244

Back First Name Last Name Business Email Address Business Telephone Number

Cancel

Back

Continue



# On-Screen 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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**Contact Us** by email.



Access the Open Payments User  
Guide

### Success Confirmed

You have successfully requested to be affiliated with You have successfully accepted your affiliation with ABCDE Hospital

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

You will receive an email when your nomination is approved. 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.

# Reminders for Confirming Nominations

- Have the registration ID and nomination ID on hand for a teaching hospital role
- Have the nomination ID on hand if you are nominated for a physician authorized representative role
- Understand the user roles and what actions you will be able to perform

## 4. Teaching Hospital User Self-Nomination

# Teaching Hospital Self-Nomination Overview

- Self-nominations occur when an individual nominates him or herself for a user role to a teaching hospital that has already been registered
- Individuals cannot self-nominate for roles related to physicians—only teaching hospitals
- Self-nominations must be approved by an authorized official
- The teaching hospital must already be registered in the Open Payments system
- Self-nominate for either authorized official or authorized representative role
- EIDM registration is required prior to Open Payments system registration

# Fields for User Profile

Required and Optional Fields for Individual User Profiles Table


Fields	Required	Optional
First Name	X	
Middle Name		X
Last Name	X	
Name Suffix		X
Job Title	X	
Business Address	X	
Business Phone Number	X	
Business Email Address	X	

# Teaching Hospital Self-Nomination Process Overview

Access the Open Payments System  
via the CMS Enterprise Portal




Search for the Teaching Hospital  
Using the Required Fields



Select Teaching Hospital



Select Your Role and Enter Personal  
Information



Review and Submit Profile

# Before Beginning Teaching Hospital Self-Nomination

- **Have EIDM user ID and password on hand**
- Check that you have access to the Open Payments application through EIDM
- Have the required profile information available
- Know which role you want—authorized representative or authorized official
- Be sure to use Internet Explorer 8 or higher
- Only use the navigation buttons within the Open Payments system itself—never use the navigation buttons on your browser toolbar

# Teaching Hospital Self-Nomination Instructions



# 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.*



[illegible]

# Step 3: Select Profile Type

Home

Review and Dispute  
Review, Dispute

Manage Teaching Hospitals  
Register, Edit, Nominate Roles

My Profile  
Account, Roles, Notifications

Help


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

## 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

# Step 4: Select Search Criteria for Teaching Hospital

## 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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↩ Access the Open Payments User Guide

### 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

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# Step 5: View Teaching Hospital Search Results

## Open Payments (Sunshine Act)

### Create Profile

✓ Select Profile Type

Teaching Hospital Search

Personal Information

Review and Submit Profile

? Need help with the website?  
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➡ Access the Open Payments User  
Guide.

### 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 OIG's Open Payments website at <http://oig-omp.gov/openpayments>. If you do not find your teaching hospital listed, contact the Open Payments Help Desk ([openpayments@oig-omp.gov](mailto:openpayments@oig-omp.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:

ADCD 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 already registered in the Open Payments system.

ADCD Hospital  
7500 Security Blvd. Baltimore  
MD 21244  
TN 123456789

Would you like to affiliate yourself with this teaching hospital? Click Continue to affiliate yourself with this teaching hospital and identify your user role.

Cancel

Back

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

③ Personal Information

④ Review and Submit Profile

?

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### 2 Teaching Hospital: Register Teaching Hospital

Review the teaching hospital information below to ensure this is the teaching hospital you wish to affiliate with. Accept or reject your nominated role(s) by selecting the corresponding radio button below. Select "Continue" to review and complete your user profile.

#### ABCDE Hospital

<b>Business Address:</b>	<b>Taxpayer Identification Number (TIN):</b>
7500 Security Blvd Baltimore MD 21244	123456789

#### Additional Information for Registration

**National Provider Identifier (NPI):**123456789

**Teaching Hospital Business Phone Number:**555-555-5555

Cancel

Back

Continue

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# Step 7: Select Role for Nomination

## Open Payments (Sunshine Act)

Create Profile

- ✓ Select Profile Type
- ② Teaching Hospital Search
- Register Teaching Hospital
- Your Role**
- 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 select the role of authorized official of the teaching hospital. In addition to registering the teaching hospital, the authorized official is responsible for approving all nominations and modifying other user roles for the teaching hospital.

#### \* Choose your role:

Select the role of "Authorized Official" to proceed with registering the teaching hospital.

- ☒ **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.

#### Your Role-Related Information

Enter your personal information below:

* First Name:	Middle Name:
James	
* Last Name:	Suffix (Jr., Sr., etc.):
Doe	
* Email Address:	* Business Phone:
teachinggroup@yopmail.com	555-555-5555
	000-000-0000

Cancel

Back

Continue

# Step 8: Enter Personal Information

## Open Payments (Sunshine Act)

### Create Profile

✓ Select Profile Type

✓ Teaching Hospital Search

① Personal Information

④ Review and Submit Profile

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Guide

### 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 OIG accounts, such as your Medicare, National Plan & Provider Enumeration System (NPES), or Enterprise Identity Management (EIM) accounts.

#### Your Name

\* First Name:

James

\* Last Name:

Doe

Middle Name:

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

#### Business Address

\* Job Title:

Manager

\* Business Email Address:

teachinggrp@gmail.com

\* Business Telephone Number:

555-555-5555

555-103-4000

\* Business Address, Line 1:

7500 Security Blvd

Business Address, Line 2:

\* City Name:

Baltimore

\* State:

Maryland

\* Zip Code:

21244

00000

00000

Cancel

Back

Continue



# Step 9: 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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Guide

### 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 21204

Taxpayer Identification Number (TIN): 023456789

National Provider Identifier (NPI): 0234567890

Teaching Hospital Business Phone Number: 800.555.0000

Your Role: Authorized Official

First Name: James

Middle Name:

Last Name: Doe

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

Business Email Address: teachingmail@gmail.com

Business Telephone Number: 800.555.0000

Job Title: Manager

Business Address, Line 1: 7500 Security Blvd

Business Address, Line 2:

City Name: Baltimore

State: Maryland

Zip Code: 21204

#### Nominations:

Role	First Name	Last Name	Business Email Address	Business Telephone Number
Authorized Official	James	Doe	teachingmail@gmail.com	800.555.0000

Cancel

Back

Continue

# On-Screen 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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Access the Open Payments User  
Guide

### Success Confirmed

You have successfully requested to be affiliated with ABCDE Hospital

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

You will receive an email when your nomination is approved. 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.

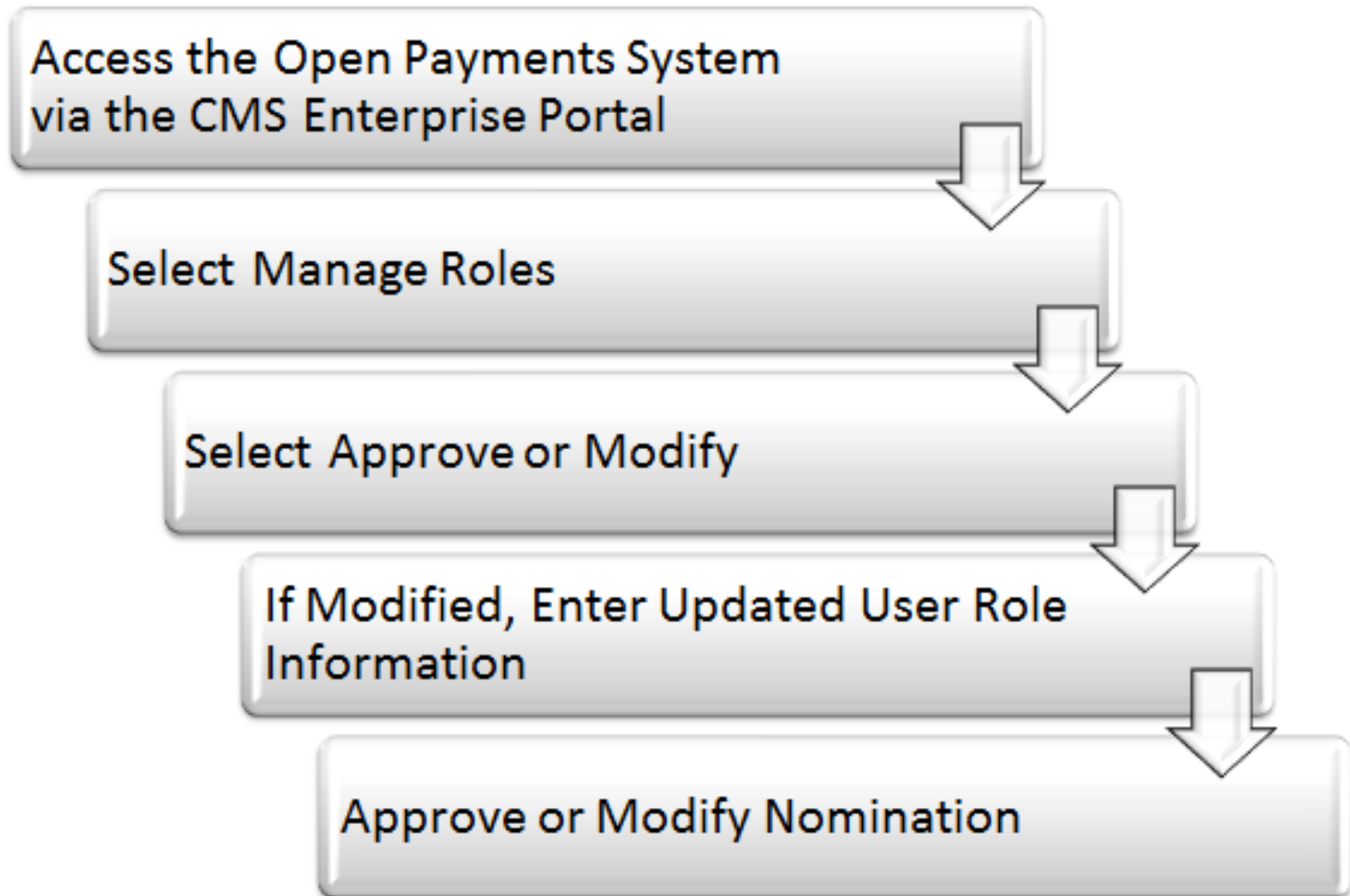
## **5. Approving Self-Nominations (Teaching Hospitals Only)**

# Approving Self-Nominations Overview

Authorized officials:

- May either approve or reject the nomination
- Must approve user nominations before users can perform the functions of their roles
- Will receive an email notification when an individual self-nominates for a user role

# Approving Self-Nominations Process



# Before Approving Self-Nominations

- **Have your EIDM user ID and password on hand**
- Know who has submitted a self-nomination request and if they are the appropriate individual to fill that role
- Use Internet Explorer 8 or higher
- Only use the navigation buttons within the Open Payments system itself - never use the navigation buttons on your browser toolbar

# Approving Self-Nominations Instructions

# Step 1: Log into the Open Payments System via the CMS Enterprise Portal and Select “Manage Teaching Hospitals”

## Open Payments (Sunshine Act)

Teaching Hospital [Switch User Type](#)

Home

Review and Dispute  
Review, Affirm, Dispute


Manage Teaching Hospitals  
Register, Edit, Nominate Roles


My Profile  
Account, Roles, Notifications


Help

### Welcome to the Open Payments System

You can manage your user profile and perform user role functions associated with your profile.

 Access the Open Payments User Guide

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# Step 2: Select Hospital to View

## Open Payments (Sunshine Act)

Teaching Hospital [Switch User Type](#)

Home

Review and Dispute  
Review, Affirm, Dispute

Manage Teaching Hospitals  
[Register, Edit, Nominate Roles](#)

My Profile  
Account, Roles, Nominations

Help

### Manage Teaching Hospitals

Below are the teaching hospitals with which you are affiliated and authorized to view. If you are an authorized official, you may register additional teaching hospitals with the Open Payments system. Select "Register New Teaching Hospital" to begin registering a new teaching hospital. To edit the teaching hospital information or manage user roles (including nominating new users), select the appropriate teaching hospital.

[Register New Teaching Hospital](#)

#### Your Teaching Hospitals

Name:

[ABCDE Hospital](#)

Status:

Registered



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# Step 3: Select “Manage Roles” Tab

## Open Payments (Sunshine Act)

Teaching Hospital [Switch User Type](#)

Home

Review and Dispute  
Review, Affirm, Dispute

Manage Teaching Hospitals  
[Register, Edit, Nominate Roles](#)

My Profile  
Account, Roles, Nominations

Help

### ABCDE Hospital

Teaching Hospital  
Information

Manage Roles

Below is the information for the teaching hospital with which you are affiliated. If you are an authorized official, you have the ability to update the information associated with this teaching hospital.

To update information, select "Update Teaching Hospital."

Update Teaching Hospital

#### ABCDE Hospital

Business Address: 7500 Security Blvd  
Baltimore, MD 21244

Taxpayer Identification Number (TIN): 111111111

National Provider Identifier (NPI): 1234512345

Teaching Hospital Phone Number: 555-555-5555



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Guide



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# Step 4: Select “Approve” or “Modify”

## Open Payments (Sunshine Act)

Teaching Hospital [Switch User Type](#)

Home	Review and Dispute Review, Affirm, Dispute	Manage Teaching Hospitals <a href="#">Register</a> , <a href="#">Edit</a> , <a href="#">Nominate</a> , <a href="#">Roles</a>	My Profile Account, Roles, Nominations	Help
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### ABCDE Hospital

Teaching Hospital Information	Manage Roles
----------------------------------	--------------

Below is the list of nominations for the teaching hospital. You may have up to 10 active users for this teaching hospital, 5 of which can be authorized officials. Select one of the actions (i.e. “Modify”, “Approve”) to update or approve the roles. Select “Nominate New Role” to create a new nomination.

[Nominate New Role](#)

Name:	Role:	Status:	Actions:
John Doe	Authorized Official	Vetted	
James Doe	Authorized Official	Requested	<a href="#">Approve</a>
Jane Doe	Authorized Official	Accepted	
James Doe	Authorized Official	Nomination Approved	<a href="#">Modify</a>



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## Step 4 (If Modified): Update User Role

[illegible]

# Step 5: View Updated Nominations

## Open Payments (Sunshine Act)

Teaching Hospital [Switch User Type](#)

Home

Review and Dispute  
Review, Affirm, Dispute

[Manage Teaching Hospitals](#)  
[Register, Edit, Nominate Roles](#)

My Profile  
Account, Roles, Nominations

Help

## ABCDE Hospital

Teaching Hospital  
Information

Manage Roles

Below is the list of nominations for the teaching hospital. You may have up to 10 active users for this teaching hospital, 5 of which can be authorized officials. Select one of the actions (i.e. "Modify", "Approve") to update or approve the roles. Select "Nominate New Role" to create a new nomination.

[Nominate New Role](#)

Name:	Role:	Status:	Actions:
John Doe	Authorized Official	Vetted	
James Doe	Authorized Official	Nomination Approved	<a href="#">Modify</a>
Jane Doe	Authorized Official	Accepted	
James Doe	Authorized Official	Nomination Approved	<a href="#">Modify</a>



Access the Open Payments User Guide



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# **Next Steps and Available Resources**

# What You Can Do Now

- Register for your EIDM user ID and password and request access to the Open Payments system, if you haven't already done so
- Decide who will be the authorized official(s) for the teaching hospital
- Decide who will serve as an authorized representative on behalf of the physician or teaching hospital, if anyone
- Register in the Open Payments system
- Begin review and dispute actions after successful registration
- Register for the CMS listserv via [the Open Payments website \(http://go.cms.gov/openpayments\)](http://go.cms.gov/openpayments) to receive email updates about Open Payments

# 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” page: http://www.cms.gov/Regulations-and-Guidance/Legislation/National-Physician-Payment-Transparency-Program/Teaching-Hospitals.html](http://www.cms.gov/Regulations-and-Guidance/Legislation/National-Physician-Payment-Transparency-Program/Teaching-Hospitals.html)
  - [“Physician” page: http://www.cms.gov/Regulations-and-Guidance/Legislation/National-Physician-Payment-Transparency-Program/Physicians.html](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)