

Open Payments System Quick Reference Guide

Identity Management System (IDM) Registration

Introduction

This guide is for:

1. Users who have not previously registered in the CMS Enterprise Portal/IDM. IDM is used in support of other CMS programs, such as the Physician Quality Reporting System (PQRS).
2. CMS Enterprise Portal users who have not previously accessed the Open Payments System.
3. Users who have previously registered in the CMS Enterprise Portal/IDM and the Open Payments System but their account has been deactivated due to inactivity.

Participation in the Open Payments system requires users to be registered in both IDM and the Open Payments system. This two-step verification process is to prevent others from using a user's identity fraudulently.

Prerequisites

- None

Actions

- Registering in IDM and requesting access to the Open Payments system.

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

1. Navigate to the CMS Enterprise Portal Login page at <https://portal.cms.gov> and select the "New User Registration" button.
2. Select "Open Payments" from the dropdown list on the "Select Your Application" page.
3. Agree to the Terms and Conditions of the CMS Enterprise Portal page and then select "Next" to continue. Two Terms and Conditions sections of particular importance to read are:
 - Consent to monitoring; and
 - Collection of Personal Identifiable Information (PII).

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

Last Modified: January 2023

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

4. Enter requested personal information on the “Register Your Information” page. Select the “Next” button. Data fields to be completed are the following:
 - Name (First, Middle, Last, Suffix)
 - Date of Birth (Month, Date, Year)
 - Is Your Address US Based (Yes/No)
 - Home Address, City, State, Zip Code
 - Email Address
 - Confirm Email Address
 - Phone Number

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

NOTE FOR INDIVIDUALS WITH FOREIGN ADDRESSES: Individuals with addresses outside of the United States can register in IDM via the online portal, but the identity proofing must be conducted manually. Once the information has been entered into the CMS Enterprise Portal, contact the Open Payments Help Desk at openpayments@cms.hhs.gov or 1-855-326-8366 or for TTY line call 1-844-649-2766 for assistance with the manual identity proofing process.

5. Create an IDM User ID and password per the guidance provided below on the “Create User ID, Password & Security Question/Answer” page. Users will be asked to select a security question and provide a security answer. Select “Next” when finished.
 - Your IDM User ID:
 - Must be a minimum of 6 characters and contain at least 1 letter;
 - Contain alphanumeric characters;
 - Allowed special characters are limited to hyphens (-), underscores (_), apostrophes (’), and periods (.)

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- The @ symbol is allowed only if the user ID is in a valid email address format (j.doe@abc.edu or 123@abc.com)
- Cannot contain 9 consecutive numbers;
- Cannot begin or end with special characters;
- Cannot contain more than 1 special character;
- Your IDM password:
 - Must be changed every 60 days;
 - Must be a minimum of 8 characters;
 - Must contain: 1 upper case and 1 lower case letter, 1 number, and 1 special character;
 - The following special characters may not be used? <> () ' " / \ &(space);
 - Cannot contain: Parts of User ID, First Name, Last Name, common passwords;
 - Can only be changed once every 24 hours;
 - Must be different from the last 24 passwords;
- Confirm password:
 - Confirm password;
 - Enter the same password;
- Select your security question:
 - Select a question from the dropdown list of questions;
- Security answer:
 - Can contain alphanumeric characters;
 - Can contain spaces;
 - Must be at least 4 characters;
 - Cannot contain part of the security question;
 - Your security answer will be required for you to reset your password or unlock your account;

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6. On the “New User Registration Summary” page, review the information and make any necessary edits before submitting. Select the “Submit User” button to submit the information.
7. A “Confirmation” is displayed acknowledging successful registration and that an email has been sent to your registered email address. Select the “CMS.gov Enterprise Portal” link (top left) or the “login” link to return to the CMS Enterprise Portal Home page.

After successful IDM registration, proceed to Step 2, requesting access to the Open Payments system.

Step 2: Request Access to the Open Payments System

1. Navigate to the CMS Enterprise Portal at <https://portal.cms.gov> and enter your CMS User ID and Password.
2. Read the Terms and Conditions of the CMS Enterprise Portal page and select the checkbox next to the “Agree to our Terms and Conditions” link
3. Select the “Login” button to log in.
4. You will land on the “Request Application Access” page.
5. Select “Open Payments” from the dropdown and select “Next”.
6. Select "Applicable Manufacturer, GPO, Physician, Non-Physician Practitioner or Teaching Hospital" from the “Role” drop-down menu, then select “Next”.
7. You will be sent to the identity verification page. Select “Next”. Agree to the terms and conditions. Select “Launch”.
8. Read the Identity Verification Overview Step #1 and select “Next”.
9. Accept the terms and conditions Step #2 and select “Next”.
10. Enter your information and select “Next”.
11. Enter a justification for being granted the role in the “Reason for Request” field and select “Submit”.
12. You will see a confirmation pop-up. Select “Ok” to continue.

Adding Multi-Factor Authentication (MFA) for Level Of Assurance (LOA) 3 Users - Optional

Adding an MFA is **not required** to obtain access to the Open Payments system. Users may also register the device(s) at a later time. Note that the steps for adding MFA are applicable for LOA 3 roles only.

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To add Multi-Factor Authentication (MFA),

- 1) Navigate to “My Profile” and select “Manage MFA Devices”. MFA devices include Email, Text Message Short Message Service (SMS), Interactive Voice Response (IVR), Google Authenticator, and Okta Verify.
- 2) Select “Register a Device”.
- 3) Select the device you wish to register.
- 4) Depending on the device you choose to register, you will be asked to provide information about that device (Phone number). Enter the required information for the device you are registering and select “Send MFA Code”.
- 5) Enter the code sent to your device and select “Add Device” to successfully add your MFA Device.
- 6) You have successfully added an MFA device to your IDM account.

IDM Account Inactivity

IDM will lock a user account if no activity is reported in the account for 60 or more days.

When you log in after 60-days, the system will display the “Unlock My Account” view. To unlock the account, enter the user ID and correctly answer the security question. Then enter a new password in the input fields of “New Password” and “Confirm New Password”.

IDM Account Deactivation

IDM will temporarily deactivate a user account after 180+ days of inactivity. Once an account is deactivated, the user will not be able to access CMS applications, including the Open Payments system.

If your account is deactivated, contact the Open Payments Help Desk by phone at 1-855-326-8366 to reinstate the account. For the TTY line, call 1-844-649-2766.

IDM permanently removes a user account, if you have not logged in for two or more years. If your account is removed, it cannot be reactivated again. If you need access to IDM, you will be required to set up a new account.

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Next Steps

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

Note: Please log out from IDM and log back in to register in Open Payments.

- **For physicians (including principal investigators), non-physician practitioners (NPP)** (including principal investigators) **or teaching hospitals**, the next step is to register yourself in the Open Payments system.

Note: Please log out from IDM and log back in to register in Open Payments.

Additional Resources

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

Quick reference guides relevant to your next steps include:

Applicable Manufacturers/Applicable GPOs

- AM/GPO Registration and Recertification
- Reporting Entities: User Roles, Nominations, Approving/Modifying Nominations, and Deactivating Users
- Self-Nominations and Accepting/Rejecting Nominations
- Physician and Non-Physician Practitioners (NPPs) Registration
- Teaching Hospital Registration

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Disclosure

- **Disclaimer:** The contents of this document do not have the force and effect of law and are not meant to bind the public in any way unless specifically incorporated into a contract. This document is intended only to provide clarity to the public regarding existing requirements under the law.
- **Activities/persons addressed by this document:** Guidance for users who have not previously registered in the CMS Identity Portal/IDM and for CMS Identity Portal users who have not previously accessed the Open Payments System.
- **Date of document issuance:** January 2023
- **Replacement / Revision Status:** Revision to previous versions
- **Agency Identifier:** CPI DASG/CPI DTP/DASG/CPI 2868
- **Summary of Document:** Instructions for completing IDM registration.
- **Citation to statutory provision/regulation applicable to this document:**
 - **Statute citation:** Social Security Act SEC. 1128G. [42 U.S.C. 1320a-7h]
 - **Rule citation:** 42 C.F.R. §403.900-14

Last Modified: January 2023

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