Registration Disclaimers

The Open Payment site can be slow, and may drop your info from fields, particularly if you use the cancel button or ever try to use the back button of your browser. After every major step, give the system 2-5 minutes to process. You may need to give the system additional for the vetting process required when registering as a physician in Open Payments. The following is a walkthrough of each step, from initial registration with CMS, to disputing payments received in the Open Payments system.

A. Registering EIDM Account

1) On the Enterprise Portal Page click the “New User Registration” link on the right hand side, under “Login to CMS Secure Portal”
2) Accept the Terms & Conditions by clicking the checkbox, and press the “next” button.
3) Enter your personal information and then click the “Next” button at the bottom of the page.
4) Choose a User ID and Password, along with 3 challenge questions and answers, and press “Next” (Note that your password must be changed at least every 60 days.)
5) Complete Registration – Click the OK button to return to the CMS enterprise Portal Homepage.
   • If registration was successful, you will receive a confirmation email which will contain a link to the CMS Secure Portal. As the system may take some time to verify, you may want to give it up to 5 minutes. The confirmation email need not be viewed, and you can log in without accessing it. However, if you have problems going forward, ensure that you did receive the email.

B. Requesting Access to Open Payments and Identity Verification

6) Once you have received the confirmation email, go to the Enterprise Portal Page and this time click the “Login to CMS Secure Portal” button on the right hand side.
7) Again, accept the terms and conditions, (This page will show up every time you log in to EIDM) and on the next page, login using the User ID and Password from Step 4) above.
8) After logging in, you will be taken to your Welcome to CMS Enterprise Portal page. On the right hand side there will be a box with “Request Access” and a “Request Access Now” button. Click that button to proceed.
9) On the next page, click on the “Request New System Access” link on the left hand side.
10) Under “Request New System Access,” for the System Description select “OPENPAYMENTS – Open Payments Application” from the drop-down list. Once selected, a new drop down will appear for the “Role.” Select “Applicable Manufacturer, GPO, Physician, or Teaching Hospital,” then click the “submit” button. This will lead you to the Identity Verification Process.
11) The next page, Identity Verification, will prompt you to verify your identity for the heightened security demanded by Open Payments. After reading the page, select “Next.”
12) Agree to the terms and conditions (click the check box), and select “Next.”
13) On the next page, **Your Information**, you will be asked to enter personal information similar to step 3). Some fields may be pre-populated with information from your EIDM profile. Confirm the accuracy, and fill in any fields not pre-populated and click “Next”.

14) The next page, **Verify Identity**, will have identity proofing questions like you would see if you made a credit inquiry. Answer the questions and click the “Next”.

15) You will next see the **Complete Step[sic] Up** page, when you have completed the Remote Identity Proofing Process. Clicking “Next” will lead you to the **Successful Completion!** page, which will inform you that your request was successfully completed. Click the “OK” button.

16) Now, log out of EIDM by clicking the “Log Out” button at the very top of the page, and wait 2-5 minutes for processing. After 2-5 minutes, log back in as you did in steps 6), 7), and 8).

C. **Registering as a Physician in Open Payments**

17) Once you have logged back in, you should now see the “Open Payments” dropdown at the top left of the page. Select “Open Payments Home” from the drop down that appears when you mouse over it.

18) You will now see the **Open Payments (Sunshine Act)** page. Click on the large “Create My Profile” button in the middle of the page.

19) On the next page you will see **Create Profile** at the top, read the relevant information, particularly under **2. Registration for a Physician**, scroll to the bottom of the page, and click the “Start Profile” button.

20) On the next page, **Select Profile Type**, select “Physician” from the radio buttons, and then click the yellow “Continue” button at the bottom of the page.

21) The next page **Physician: Personal Information** asks for basic personal information (name, etc.) as well as your practice/professional information. Enter it and click “Continue”.

22) The following page will ask for more information such as:

- Your National Provider Identification (NPI) and Drug Enforcement Administration (DEA) numbers. While not all physicians will have NPI and DEA numbers, if you do have them, they should be entered.

- Physician Specialty Codes. While it says to refer to the Open Payments User Guide, it is best to refer to the **Taxonomy Crosswalk**, which will list a “Provider Taxonomy Code” for every given specialty. **Do not enter the two digit “Physician Specialty Code” from the first column (despite it being requested on the page), enter the number from the “Provider Taxonomy Code” column. It should be numbers w/ letters, such as 207K00000X (for Allpopathic & Osteopathic Physicians/Allergy and Immunology). The system will not accept any specialty codes not on the list.

- At least one Physician License Number. If you have more than one physician license number, failure to enter all of them may prevent you from reviewing all records pertaining to you.

After entering the information, click the yellow “Continue” button.
23) The next page, **Physician: Authorized Representative**, will give you the option to designate a representative to access the Open Payments system. “Designate an Authorized Representative” is selected by default. If you wish to designate a representative, fill in the applicable information, and click “Continue”. If you do not wish to designate a representative, select “not now” from the radio buttons near the top, and click the yellow “Continue” button at the bottom of the page.

24) **Review and Submit Profile** on the next page. Make sure all of the information is accurate, scroll to the bottom of the page and click the yellow “Submit” button. If any information is not accurate, click the yellow “Back” button to go back and change anything.

25) After submitting, there will be a page confirming the successful creation of your profile. Click the go to “Open Payments Home” link to proceed.

   i. **Note:** physician registration is not considered complete until the vetting process has been successfully completed. As a result, you may not be able to access the Review and Dispute function until the vetting is successful. You can check your profile status by going to “My Profile” and reviewing the “Role Status” field.

D. Review and Dispute any Payments

26) From the **Open Payments (Sunshine Act)** home page, select the “Review and Dispute” button on the navigation bar.

27) On the **Review and Dispute Overview** page, select your name from the drop down under “Choose a Physician” and select 2013 under the “Program Year” drop down. Then click the yellow “Show Records” button. **If your name does not appear in the “Choose a Physician” drop down, it means you either have no reported payments on record or your physician status has not been vetted. Ensure your status by going to “My Profile” and reviewing the “Role Status” field.**

28) On the next Review and Dispute page, you will see a drop down, with some additional fields, and a table listing all the payments you may have received. You may filter the table by entity making payment via the drop down. **If nothing appears in the “Entity Making Payment” drop down, it means you have no recorded payments.**

29) For any entry in the table, you can scroll to the right and click “View” under the View Record column. Selecting View will take you to a page with more detail for the payment.

30) You may then click the check box on the left hand side, and use the buttons above the table to either to “Affirm Record,” “Dispute Record,” or “Withdraw Dispute”

   i. You may only affirm records with a Review and Dispute status of “Resolved, no change,” “Withdrawn,” or “Resolved,” or records with no review and dispute status.

   ii. If you dispute a record, you must provide a reason for why in the “Reason for Dispute” text box. If you have different reasons for disputing multiple records, select them one at a time and dispute them individually. **After entering the reason, click the “Send Dispute” button.**