1. Go to Website: https://portal.cms.gov/wps/portal/unauthportal/home/
2. Click on New User Registration on the right side of the screen:
3. Agree to terms
4. Enter Demographics
5. Choose username, password, security questions

Once you’ve registered you get an immediate email confirmation from donotreply@cms.gov with subject: enterprise identity Management System (EIDM) Account registration

1. Go back to the homepage (or click link in #1 above) and login to the portal
2. Select “Request Access Now”

3. Select “Request New Application Access”

4. From dropdown for System Description select “Open Payments” and when the second dropdown for role appears select appropriate role... and click submit

- Application Description: “Open Payments”
- Role: “Applicable Manufacturer, GPO, Physician, or Teaching Hospital”

5. Click “Next” on Identity Verification Screen, agree to terms on next screen and click “next”, review demographics and confirm email, enter SS# and then click “Next”.
6. On the Verify Identity Screen it will ask you to answer some personal questions to help prove you are the one completing the information. Select the appropriate answers and click “Next” and then click “Next” on the following screen. Then click “OK” on the successful completion screen.

7. Logout and then log back in to the portal.
   https://portal.cms.gov/wps/portal/unauthportal/home/

8. There will now be a gold “Open Payments tab in the upper left. Click on it and choose “Open Payments- Home”

9. Click on the sideways triangle to “Create a Profile”

![Open Payments (Sunshine Act)](image)

Getting Started

10. Scroll to bottom of the next page and click “Start Profile”

11. Select “Physician” radio button and then click “Continue”

12. Enter Demographics and click “Continue”
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 in your other CMS accounts, such as Medicare, National Plan & Provider Enumeration System (NPPES), or Enterprise Identity Management (EIDM) accounts.

Your Name

*First Name: ___________________________  Middle Name: ___________________________

*Last Name: ___________________________  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: ___________________________

*Business Telephone Number: ___________________________

Physician Practice Name: ___________________________

Physician Practice Business Address

*Practice Business Address, Line 1: ___________________________

Practice Business Address, Line 2: ___________________________

*City Name: ___________________________  *State: ___________________________

*Zip Code: ___________________________  

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[Buttons: Cancel, Back, Continue]
13. On the Physician Details page select the appropriate Physician Type from the dropdown box, enter your NPI number, your Physician Specialty (Taxonomy) Code(s)*

* Refer to the taxonomy code list for a complete listing of the available taxonomy codes. Specialty codes that are not on the taxonomy code list may not be entered. Example Taxonomy codes also appear in screenshot below. You will also need to find your DEA #. Please contact the DEA Office of Diversion Control if you cannot find it.

- Pediatrics - 208000000X [definition]
- Adolescent Medicine - 2080A0000X [definition]
- Child Abuse Pediatrics - 2000C0000X [definition]
- Clinical & Laboratory Immunology - 2080I0007X [definition]
- Developmental – Behavioral Pediatrics - 2080P0006X [definition]
- Hospice and Palliative Medicine - 2080H0002X [definition]
- Medical Toxicology - 2080T0002X [definition]
- Neonatal-Perinatal Medicine - 2080N0001X [definition]
- Neurodevelopmental Disabilities - 2080P0008X [definition]
- Pediatric Allergy/Immunology - 2080P0201X [definition]
- Pediatric Cardiology - 2080P0202X [definition]
- Pediatric Critical Care Medicine - 2080P0203X [definition]
- Pediatric Emergency Medicine - 2080P0204X [definition]
- Pediatric Endocrinology - 2080P0205X [definition]
- Pediatric Gastroenterology - 2080P0206X [definition]
- Pediatric Hematology-Oncology - 2080P0207X [definition]
- Pediatric Infectious Diseases - 2080P0208X [definition]
- Pediatric Nephrology - 2080P0210X [definition]
- Pediatric Pulmonology - 2080P0214X [definition]
- Pediatric Rheumatology - 2080P0216X [definition]
- Pediatric Transplant Hepatology - 2080T0004X [definition]
- Sleep Medicine - 2080S0012X [definition]
- Sports Medicine - 2080S0010X [definition]

14. Click “Add License” and then choose the appropriate state from the dropdown and then enter your license number in the appropriate box and then click “ADD” (If you have other state licenses add those as well) then click “Continue”
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. Note: You will not be able to perform all of the system functions, such as review and dispute, until your profile has been successfully vetted. Physicians need to enter into their profile their NPI, if they have one, as well as all of their state licenses in order to be able to review all records associated with them.

Physician Identification

*Physician Primary Type:

Medical Doctor

National Provider Identification (NPI):

The NPI is a 10-digit number; do not use any dashes or other special characters

Drug Enforcement Administration (DEA) Number:

The DEA number is a 9-alphanumeric ID; do not use 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 "taxonomy codes."

Refer to the Open Payments User Guide for the available taxonomy codes that can be entered for the Physician Specialty field.

*Physician Specialty Code:

Specialty Code 2:

+ ADD SPECIALTY CODE

State Licensing Information

Enter at least 1 and up to 52 state license numbers and issuing state combinations. Exclude any special characters that appear in the license number. Select "Add License" to add more licenses.

<table>
<thead>
<tr>
<th>License State</th>
<th>License Number</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Delete</td>
</tr>
</tbody>
</table>

- ADD LICENSE

Cancel       Back       Continue
15. If you are thinking of assigning a delegate, please refer to our Sunshine Act FAQs regarding appropriate delegate roles.

16. Review your information and click “Submit”

Log out of the system. Your information will be verified. Later, (up to 24 hrs. for them to “vet” your information) you can log back into the portal, go to the open payments home page and choose “Review and Dispute, Review, Affirm, Dispute” tab to review any reported open payments. See below for screen shots of these screens.
Welcome to the Open Payments System

Announcements:

2014 Program Year General Information - You may now register yourself or an affiliated hospital in the Open Payments system. The "Open Payments System Quick Reference Guide: Physician Registration" and "Resource Library: Hospital Registration" located on the Resources page of the Open Payments website, provide more information.

Review and dispute functionality in the Open Payments system is available until the beginning of the next review and dispute period in April 2015. CMS will announce the exact dates of the review and dispute period via the Open Payments Notice.

Visit the Open Payments website at openpayments.cms.gov/openelements for announcements, events, and information. Refer to the namespace page of the Open Payments website for educational resources. If you have questions, contact the Open Payments Help Desk by email at openpayments@hhs.gov or by phone at 1-888-282-3992.

You can manage your user profile and perform the actions associated with your profile.

Review and Dispute Overview

A field with an asterisk (*) is required.

For physician records, select the reporting entity and program year for which records relating to payments or other transfers of value or ownership or investment interests reported for you or your family members. Register for the Open Payments system so that you may receive email updates about the program including future review and dispute periods.

Physician Records

Select the reporting entity and program year for which records relating to payments or other transfers of value or ownership or investment interests are reported. Then select "View Disputes." There is an initial 45-day period for physician and teaching hospital to review and dispute their data before it is made public. Following that initial 45 days is an additional 45-day correction period for reporting entities to work with physicians and teaching hospitals to resolve disputes. Physicians and teaching hospitals may initiate disputes with reporting entities at any time, not just during the 90-day notification period. Nota the information is to understand how the dispute is initiated and resolution timing affects public display of the data.

- Disputes initiated within the initial 45-day review and dispute period, and received by the end of the same reporting entity's correction period, will be published and closed as disputed in the September 2014 publication of data.
- Disputes initiated within the initial 45-day review and dispute period, and received by the end of the correction period, will be published and closed as disputed in the September 2014 publication of data.
- Disputes initiated within the initial 45-day review and dispute period, and not received by the end of the correction period, will be published and closed as disputed in the September 2014 publication of data.

Only records for which initial submission was completed before the start of the review and dispute period will be considered for publication in the September 2014 publication of data. For a complete list of detailed rules around data publication, refer to the Open Payments User Guide.

Choose a Physician:

- [ ] Doral Ozevsky
- [ ] Program Year:
  - [ ] 2013

Show Records

~ Thank you to Duke University School of Medicine for allowing use of this document ~