

## Stanford's Tips and Tricks for registering to view OPEN PAYMENTS (@CMS.gov)

### Basic Overview

- You have to register in 3 places, once in **CMS**, once in **EIDM** and once for the **OPEN PAYMENTS** database (in this specific order)
- Create a username and ID, then create your Physician Profile (**CMS**).
- Log in with your new account and select **EIDM** to register in that system.
- Wait to receive an email after being “vetted” by system, typically overnight. Once you receive this email, log back in and request access to the **OPEN PAYMENTS** database.
- Be sure you are using a **CMS** supported browser and your cookies have been cleared if you are having issues logging in (see troubleshooting below).
- The last day to begin a transaction dispute is August 27, 2014.

### Step by Step

- Go to <http://portal.cms.gov> and select “New User Registration” link on the right
- Set up username and password like any other website.
- Password must include a capital letter, a number and another type of character (ex. !, \$, #).  
Note: passwords must be changed every 60 days.
- Click **EIDM** to register and create your Physician Profile  
Required Info:
  - Business address
  - NPI number ([NPI Lookup](#)) (This is not required but only partial records may show without this)
  - DEA number
  - State medical license number(s)
  - Specialty code ([Taxonomy Codes](#)). Note: You need to enter at least one, but can enter more than one specialty, which can be problematic. We suggest entering one code for now, as you can add others later by modifying your profile.
- After you have been vetted, you can now request access to the **OPEN PAYMENTS** database (the **CMS** website has many other databases).  
Required Info:
  - Current home address
  - SSN
  - Soft credit check by Experian, which involves selecting answers from a list of options.  
Example of security questions include:
    - Mortgage holder
    - Prior home address or phone numbers
    - Former employer
  - After your identity is verified, you will receive a confirmation email from **CMS**
- When the yellow **OPEN PAYMENTS** button appears next to ‘My Portal’, you can click **OPEN PAYMENTS** Home, select your name from the dropdown menu and select “2013” to view your records.
- Note: the records SCROLL to the right. You can see the full record of an individual transaction in the very last column that has a “view” link that you click to open.

## Troubleshooting

We have included some solutions for logging into the system, in case you run into a browser or cookies issue. We have also included some screenshots of what you will see, and some screenshots of possible errors you may encounter below.

### Log-In/Browser Support/Cookies Issues

If you are receiving multiple errors when signing in or when requesting access to the **OPEN PAYMENTS** database, you may need to clear the cookies/cache in your browser or you may be using a browser the **CMS** system does not support.

Browsers:

What browsers are supported by the **CMS** Enterprise Portal?

- Internet Explorer 8
- Internet Explorer 9
- Firefox
- Chrome
- Safari

Is JavaScript required for the **CMS** Enterprise Portal?

- Javascript needs to be enabled for successful use of the Enterprise Portal.

Clearing Cookies:

If you don't know how to clear your cookies, (e.g. you cannot log in with your username and password) check the how-to guide for your specific browser:

- Safari: <http://support.apple.com/kb/ph11920>
- Firefox: <https://support.mozilla.org/en-US/kb/how-clear-firefox-cache>
- Internet Explorer 8 or 9: <http://support.microsoft.com/kb/278835>
- Chrome: <https://support.google.com/chrome/answer/95647?hl=en>

Image 1: When you log into <https://portal.cms.gov> if you only see **one** yellow box that says “My Portal” then you still do not have access to **OPEN PAYMENTS** . If you do not see the yellow **OPEN PAYMENTS** button (see top arrow) then follow these instructions:

Before being able to obtain access to **OPEN PAYMENTS** you must select the **EIDM** ‘click here’ link (see bottom arrow) to register in **EIDM**.

Image 1

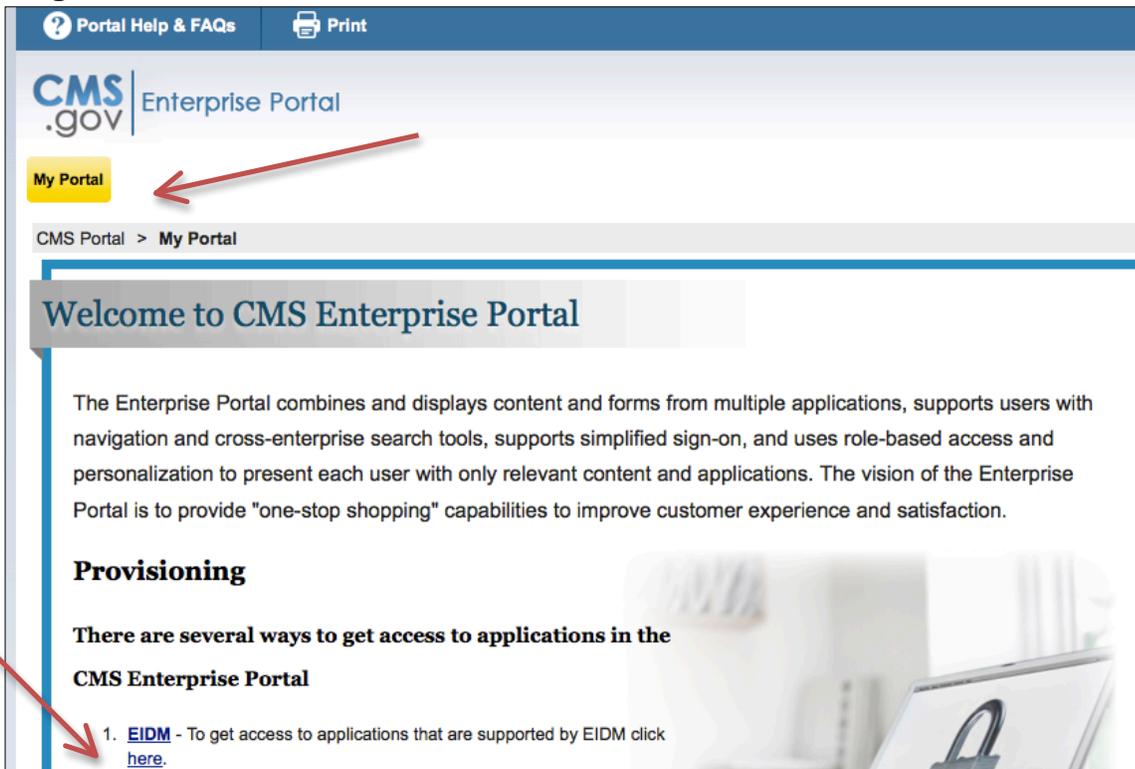
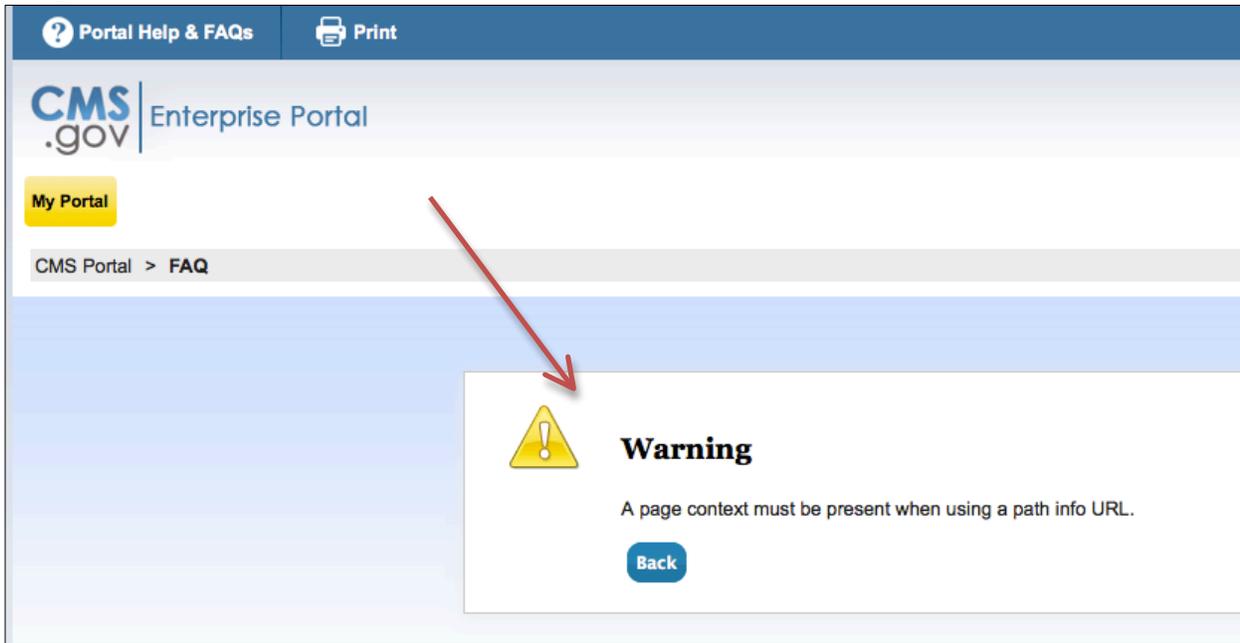


Image 2: If you select **EIDM** and warning message below you may be able to work around the problem by selecting “My Access” from the Welcome bar at top of the page seen on Image 3.

**Image 2**



**Image 3**



Once you select “My Access” on the welcome bar drop down menu, you can proceed if there are no “Pending Requests” (Arrow A). Select the ‘Manage Access’ tab (Arrow B) and click the ‘Request New System Access’ link on the left (Arrow C). If in fact you do have a ‘Pending Request’ this means you need to call the **CMS** helpdesk to move forward: 1-855-326-8366.

Image 4

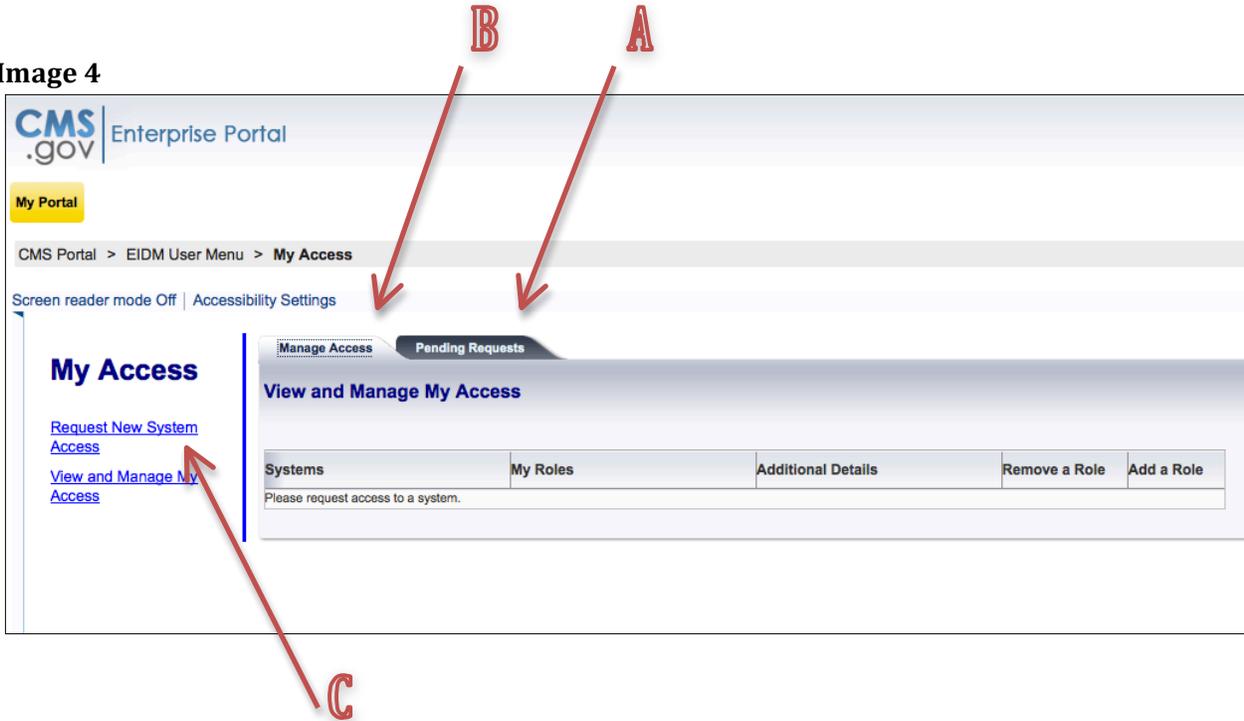
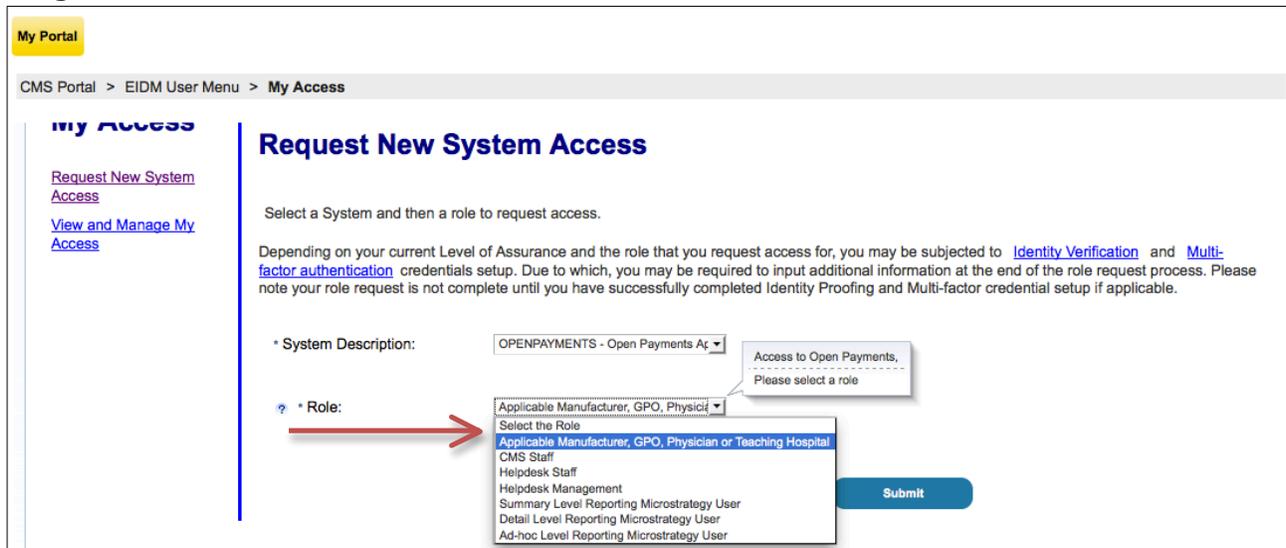


Image 5: Next, select **OPEN PAYMENTS** from the drop down menu and then select the role “applicable manufacturer, GPO, physician or teaching hospital” (it’s the first one in the list shown by Arrow below;

Image 5



If none of these tips work, contact CMS directly: 1-855-326-8366 or [CMS\\_FEPS@cms.hhs.gov](mailto:CMS_FEPS@cms.hhs.gov)

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## How to Affirm or Dispute your Records in OPEN PAYMENTS

Now that you have successfully registered in the 3 systems, **CMS**, **EIDM** and **OPEN PAYMENTS**, you wonder what's next? Here's how to review your physician data.

Image 6:

1. Click on the yellow **OPEN PAYMENTS** button and drop down to "home"
2. Then click on the blue bar that says "review and dispute", (it is a hidden link shown by Arrow;
3. Scroll to the very bottom and "select" your name. This is how you will enter the database each time and see all your records.

Image 6

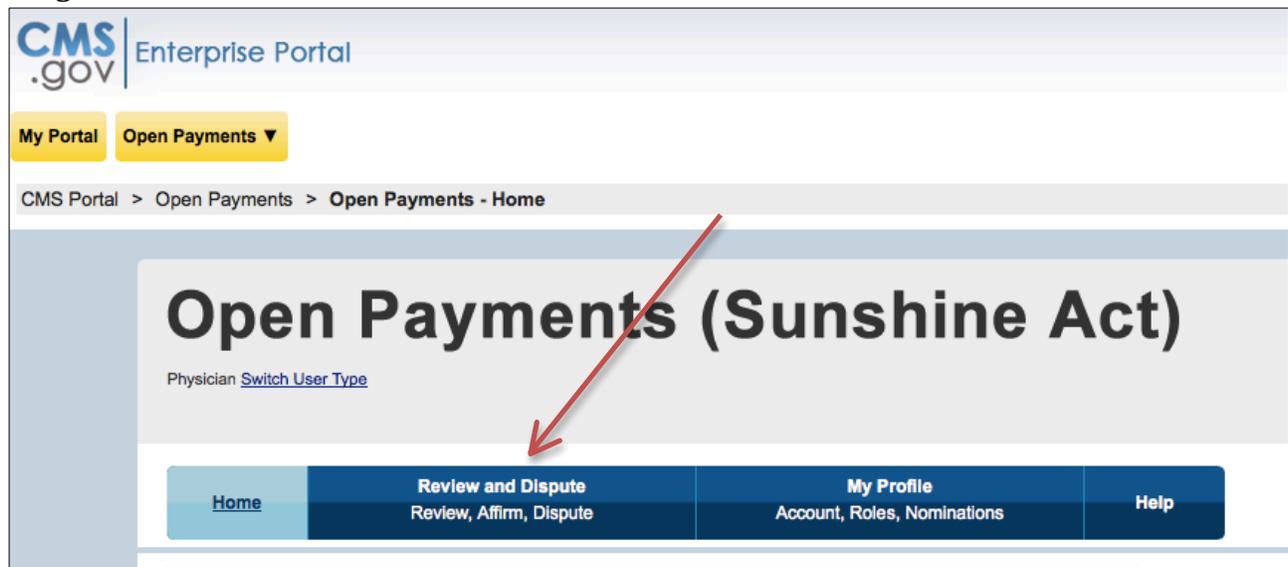


Image 7:

- Review each payment. You can select the checkbox on the left and either click the “affirm record” or “dispute record” button shown by Arrows below.
- If you want to see more details about the individual record, the table scrolls to the right. Go to the last column which has a link called “view”.

Image 7

**Physician Records**

Entity Making Payment:  Record ID:  Date Of Publication:

Dispute ID:

Review and Dispute Status:  Initiated  Acknowledged  Resolved No Change  Withdrawn  Resolved

Payment Category:  General Payments  Research Payments  Ownership or Investment Interest

Affirmed (Yes/No):  Yes  No

[Search](#) [Clear All](#)

Showing Results for: Entity Making Payment: Takeda Vaccines, Inc.

Show Entries

[Affirm Record](#) [Dispute Record](#) [Withdraw Dispute](#)

Select All <input type="checkbox"/>	Entity Making Payment	Record ID	Dispute ID	Payment Category	Form Of Payment or Transfer of Value	Nature Of Payment or Transfer of Value	Date of Payment	Amount(\$)	Delay in Publication of Research Payment Indicator	Last Modified Date	Current Record Standing
<input type="checkbox"/>	Pharmaceutical U.S.A., Inc.		514	General Payments	Cash or cash equivalent	Consulting Fee	2013-10-11	\$	No	2014-07-22	

- If you select “dispute record” you will be shown a text box that only accepts specific characters described on the page. Enter your dispute then select the ‘send dispute’.
- Note: Make sure you get to a confirmation page. If you do see a confirmation page, start again as there is a known looping<sup>1</sup> issue with the **OPEN PAYMENTS** database.

<sup>1</sup> What is looping? It is when you click a page/button to move forward and the page goes back to where you were previously, sometimes a few clicks back and you have to move forward again by repeating the steps you took to get there.