Open Payments System Quick Reference Guide: Required Information for Registration

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Introduction

To register individuals or organizations in the Open Payments system, users must provide all required information. This quick reference guide details what information is required for registration.

Collecting required information prior to registration is important, as registration cannot be partially completed and saved. Registration must be completed in one session. In addition, the Open Payments system times out after 30 minutes of inactivity and all information entered during a session that times out would be lost.

Applicable Manufacturer or Applicable GPO: Required Information for Registration

Applicable manufacturers and applicable group purchasing organizations (GPOs), collectively referred to as "reporting entities," and individuals holding user roles with them, must register with the Open Payments system. Individuals designated as primary and backup points of contact for a reporting entity do not have to register within the Open Payments system.

Individuals responding to a nomination email rather than registering the reporting entity are only required to create a personal profile.

Creating an Entity Profile

Reporting entities can be registered in the Open Payments system by individuals who hold a position within the entity such as Chief Executive Officer, Chief Financial Officer, Chief Compliance Officer, or equivalent.

To create an entity profile and register a reporting entity, the following information is required:

- Entity's legal name

- Reporting entity type (Applicable Manufacturer or Applicable Group Purchasing Organization)

- Business type

- URL of parent company

- Business address

- Business telephone number

- Type of ownership

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- Taxpayer Identification Number (TIN)/ Employer Identification Number (EIN)

- Doing Business As (DBA) name

- Is this entity part of a consolidated report (i.e., where an entity is reporting on behalf of another entity?)

- Information about two points of contacts for the entity (name, title, business telephone number, and business email address,)

- Contact information for Review and Dispute

The following information is not required for registration, but is helpful to include:

- Food & Drug Administration (FDA) Establishment Identifier

- Data Universal Numbering System (D-U-N-S® Number)

Creating a Personal Profile

After creating an entity profile, or if the entity profile has already been created, users must create a personal profile. The following information is required:

- First name

- Last name

- Business email address

- Business telephone number

- Job title

- Business address

- User's role(s) in the Open Payment system

Users should review any pre-populated information for accuracy and make edits as necessary. Changing this information in Open Payments will not change the corresponding information in the user's EIDM profile.

Nominating Individuals for User Roles

To nominate additional individuals for roles in the Open Payments system, provide the following information for those individuals:

- First and last name of nominee

- Business email address of nominee

- Business phone number of nominee

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- Role(s) for which the person will be nominated

Physician: Required Information for Registration

Each physician should register him- or herself directly in the Open Payments system and not delegate this task to another individual.

Individuals responding to a nomination email to register as a physician authorized representative will need to create only a personal profile.

Creating a Personal Profile

Physician and physician authorized representative registration begins with the creation of a personal profile. The following information is required:

- First name

- Last name

- Business email address

- Business telephone number

- Practice business address (if the physician has multiple practice addresses, the user should enter the primary business address)

Creating a Physician Profile

Registering as a physician requires the creation of a physician profile. The following information is required:

- Physician primary type

- Physician taxonomy code

- License number and license state (for at least one state in which the physician holds an active license)

The following information is required if the physician possesses these identifying numbers:

- National Provider Identifier (NPI)

- Drug Enforcement Agency (DEA) Number

Note: If the physician has an NPI, the information supplied during registration in the Open Payments system must match the information (e.g., first and last name) exactly as it is entered within the National Plan & Provider Enumeration System (NPPES) to ensure successful registration.

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Nominating an Authorized Representative

Nominating an authorized representative to assist a physician with Open Payments can be done during registration or later. Nomination requires the following information:

- Name of nominee

- Job title of nominee

- Business email address of nominee

- Business phone number of nominee

- Business address of nominee

- Access level(s) to be granted to the nominee

Teaching Hospital: Required Information for Registration

Individuals registering a teaching hospital must assume a user role of "authorized official" during registration.

Individuals responding to a nomination email to register as an authorized official or authorized representative will create only a personal profile.

Creating a Teaching Hospital Profile

To search for a teaching hospital, the following information is required:

- State where the teaching hospital is located

- Teaching hospital doing business as (DBA) name

- Taxpayer Identification Number (TIN)

- Teaching hospital business address

Creating a Personal Profile

To create a personal profile, the following information is required:

- First name

- Last name

- Email address

- Business phone number

- Business address

- Job title

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Users may review any pre-populated information for accuracy and make edits as necessary. Changing this information in Open Payments will not change the corresponding information in the user's EIDM profile.

Nominating Individuals for User Roles

To nominate additional individuals for user roles in the Open Payments system, the following information is required:

- Name of nominee
- Job title of nominee
- Business email address of nominee
- Business phone number of nominee
- Business address of nominee
- User role to be granted to the nominee

Additional Resources

All registration resources are available on the Resources page of the Open Payments website at https://www.cms.gov/OpenPayments/About/Resources.html.

The Open Payments User Guides Open Payments User Guide for Reporting Entities and Open Payments User Guide for Covered Recipients covers all registration processes in detail and provides step-by-step instructions for various scenarios.

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