# TIPS for OPEN PAYMENTS registration
*(Prepared by URMC)*

**NOTE:  The last day to review and initiate disputes is September 8, 2014. The process takes some time and there may be delays, so this should be completed well before that date.**

**General Tips**:
- Recommended Browsers:  Google Chrome or Internet Explorer.  Safari may work but is reported to be less reliable for Step 3.  Firefox is not recommended at this time.
- Sometimes the site will loop you back to a prior screen and may require you to reenter data.  It may be necessary to delete cookies from your browser when you encounter problems with the website.
- The "next" and "continue" buttons are not consistently named or always easy to find.  If you can't find it, scroll all the way to the bottom of the page and it should be there.
- Do not use your browser arrows for navigation; use the back buttons in the system.
- Contact the CMS Direct help line for assistance with registration and access:  1-855-326-8366

**Step 1 – Set up username and password**

- Go to https://portal.cms.gov.
- Click on "New user registration" link on the right side of the screen, then follow steps to set up username and password.
- You will be required to establish challenge questions.  You will be required to correctly answer these questions if you forget your password, and for other account maintenance, so make a note of them.

**Step 2 – Request access to database**

- Again at https://portal.cms.gov, click on "Log in to CMS Secure Portal" button on the right hand side, and log in.
- Click on link to Request Access Now (on the right), then request access by selecting "Request New System Access" on the left navigation followed by selection of Open Payments database (CMS website has many other databases).  For your role, select "Applicable Manufacturer, GPO, Physician or Hospital."
- Note that this step includes questions taken from your credit report to verify your identity, e.g. mortgage holder, prior address, former employer, vehicles leased, and prior phone numbers.
- After your identity is verified, you will receive a confirmation email from CMS.  They provide a link to log back in, however it appears to be unnecessary to use that link; you can access the system through the portal's general url.

**Step 3 – Set up profile**

Note: this process will take about 20-30 minutes, and must be completed in one session.  If you stop, you will have to start over.  It will also time out after 15 minutes of inactivity.

At the end of each step, there will be a "continue" or "submit" button at the bottom of the page.

Make sure you have the following information available to set up your profile: National Provider Number (NPI), Physician specialty taxonomy code(s), DEA number, and state medical license number(s).

If you do not know your NPI and/or your specialty taxonomy code(s), you can find both at https://npiregistry.cms.hhs.gov/NPPESRegistry/NPIRegistryHome.do.  This is the NPI look-up site, but when you look up your NPI, it provides other information including your specialty taxonomy code(s) and license number.

- Go to https://portal.cms.gov and click on blue "Log in to CMS Secure Portal" button on right hand side.
- Click on yellow Open Payments button and then on the Open Payments – Home link.
- On welcome page, click on "Create my Profile" – large blue button in middle of page.  Click on "Start Profile" at bottom of screen.
- Select "Physician."
- Enter personal information.  The practice name field can be left blank.  For "business address," enter the Hospital's address (601 Elmwood Avenue, Rochester NY 14642), or if you have an office practice, you can use that address.  To add specialty code, click "+specialty code" first.  To add license number(s), click "add license" first.
- You can designate someone else to have read only access to your data, to edit your profile, and/or to review your relationships and initiate disputes.  You will need their business address, email, and phone number.  The designee will receive an email from CMS with the information they need to register.  You can only have one designee.  If you click "not now" you can add someone later.
- Review your information and if it correct, click "submit."  If it is not, use the back button to make corrections.  When you submit you should see a screen that says you have successfully registered.
- Your information (next step) may not be immediately accessible, while your identity is being vetted.  This may take a day or so.

Step 4 – Review data and if necessary or desired initiate disputes

- Go to https://portal.cms.gov and click on "Log in to CMS Secure Portal" button on the right hand side
- Click on yellow Open Payments, then Open Payments – Home at upper left.
- Note: It may take time for the system to catch up if you have just created your profile, so there may be a delay before your name shows up in the "physician" field.
- Click on Review and Dispute, then review data and initiate dispute if appropriate.
- If you think that payments that are reported to you should have been reported to the institution (e.g. research grants), and need information for the dispute process, notify Gunta Liders (gunta.liders@rochester.edu) or Diane Caselli (diane.caselli@rochester.edu)
- We are maintaining a database of errors; please notify Diane Caselli (diane.caselli@rochester.edu) of any disputes you initiate.