

# Open Payments: Review & Dispute

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## Wireframes and Email Correspondence To Be Updated

To reflect removal of “dismiss dispute” language from Open Payments system

Draft June 20

# Open Payments (Sunshine Act)

Reporting Entity

- Home
- Records  
View, Edit, Report
- Review and Dispute**  
View, Respond, Resolve
- Manage Entities  
Register, Edit, Nominate Roles
- My Profile  
Account, Roles, Nominations
- Help

## Review and Dispute - Acme Medical Corporation - 2013

< Back

Takes the user back to the Review and Dispute Overview page

The table below contains the records that have been disputed by a physician or teaching hospital. The filtering tools below can assist with customizing your view.

Note: You may perform the following actions in relation to a disputed record.

- Select **"Dismiss Dispute"** - To dismiss a dispute.
- Select **"Acknowledge Dispute"** - To confirm that the applicable manufacturer or applicable GPO has received the disputed record.

To return to the previous page, select "Back."

For more information about the review and dispute process, refer to the [Open Payments User Guide](#).

[Read definitions of select data fields](#) displayed on the Review and Dispute listings.

### Applicable Manufacturer or Applicable GPO's Disputed Records

Dispute ID: \_\_\_\_\_ Record ID: \_\_\_\_\_ Home System Payment ID: \_\_\_\_\_ File ID: \_\_\_\_\_ Date of Publication: \_\_\_\_\_

Physician First Name: \_\_\_\_\_ Physician Last Name: \_\_\_\_\_ Teaching Hospital Name: \_\_\_\_\_

Review and Dispute Status: **Dispute Initiated**

Research  
 Ownership or Investment Interest

Search

Selected entity and program year are shown. Wrap name to a second, single-spaced line if it

1. Replace crossed out text with:  
2. Select "Resolved No Change" to acknowledge that the applicable manufacturer or applicable GPO and the physician or teaching hospital have resolved the dispute in accordance with the guidance in the Final Rule. This action should only be taken when dispute resolution does not require a change to the data by the reporting entity.

- September 2014
- June 2015
- June 2016
- June 2017
- June 2018

5. "Review and Dispute Status" drop-down to be modified to show "Resolved No Change" as status instead of "Dispute Dismissed"

Note this is the approximate cutoff of the viewable area of the table on the page. The page will scroll horizontally to allow

6. Title of button to be changed to "Resolved No Change"

Showing Results for: [All]

Show Entries 10

Select	Record ID	Dispute ID	Home System Payment ID	File ID	Amount (\$)	Date of Payment	Recipient	Delay in Publication of Research Payment Indicator	Date Dispute Initiated	Dispute Last Modified By	Record Status	Review and Dispute Status	History of Disputes	Affirmed (Yes/No)	Action
<input type="checkbox"/>	052365827		A-223456253	File AAA	\$350.00	03/12/2013	Peterson, Harold Jr.	No			Attested		View	Yes	View Edit
<input type="checkbox"/>	052365827	45678	A-223456777	File AAA	\$350.00	01/24/2013	Peterson, Harold Jr.	Yes	09/6/2013 4:00 PM	Peterson, Harold	Unmatched	Dispute Acknowledged	View	No	View Edit
<input type="checkbox"/>	052365827	436546	A-223456789	File AAA	\$350.00	01/24/2013	Peterson, Harold Jr.	Yes	09/4/2013 4:00 PM	White, John	Attested	Dispute Initiated	View	Yes	View Edit
<input type="checkbox"/>	131415	8897	A-223456789		\$1,121.23	01/24/2013	Excellence Hospital of Northern New York State	Yes	09/4/2013 4:00 PM	Garcia, Carmen	Attested	Dispute Acknowledged	View	No	View Edit
<input type="checkbox"/>	161718	75653	A-223456789	File ABE	\$1,121.23	10/21/2013	Name, Name	No	09/01/2013 4:00 PM	Cordoba, Emilio	Attested	Dispute Dismissed	View	Yes	View Edit
<input type="checkbox"/>	192021	97642	A-223456789		\$10,000,000.00	05/04/2013	Name, Name	Yes	09/01/2013 4:00 PM	Gunnarson, Sigrid	Attested	Dispute Acknowledged	View	No	View Edit
<input type="checkbox"/>	222324	234555	A-223456789		\$1,121.23	11/23/2013	Name, Name	No	09/01/2013 4:00 PM	Smith, Carol B	Attested	Dispute Withdrawn	View	No	View Edit
<input type="checkbox"/>	25267	435758	A-223456789	File ABF	\$1,121.23	11/23/2013	Name, Name	Yes	09/01/2013 4:00 PM	Park, Jason	Ready for Submission	Dispute Acknowledged	View	No	View Edit
<input type="checkbox"/>	282930	243636	A-223456789		\$1,121.23	11/23/2013	Name, Name	No	09/01/2013 4:00 PM	Park, Jason	Attested	Dispute Resolved	View	No	View Edit

Showing 1-10 of 108 entries

« First « 2 3 4 5 6 » Last »

Dispute ID takes user to the Dispute ID page showing most recent/current data for the dispute

Record ID takes the user to the view-only page for that record.

Acknowledge Disputes button takes user to page for acknowledging disputes for all the checked records. Dismiss Disputes takes user to Dismiss Disputes page.

If one of the selected (checked) records is in a status that does not allow the user to take the action (acknowledge, dispute), warn the user by displaying a visible alert above the table near the buttons, immediately beneath the search panel.

4. "Review and Dispute Status" to be modified to show table column value with "Resolved No Change" as status instead of "Dispute Dismissed"

for the record, do not display a View link.

In the Action column, View takes user to View-only version of record/payment's page. Edit takes the user to the Edit Record page. If record cannot be edited, such as b/c of status, show user the same type of message we're showing for the submission table.

### Dismiss Dispute Page - AM/GPO

# Open Payments (Sunshine Act)

Reporting Entity

<b>Home</b>	<b>Records</b> View, Edit, Report	<b>Review and Dispute</b> View, Respond, Resolve	<b>Manage Entities</b> Register, Edit, Nominate Roles	<b>My Profile</b> Account, Roles, Nominations	<b>Help</b>
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## Dismiss Dispute

A field with an asterick (\*) is required.

Title of page to be changed to "Resolved No Change"

### Acme Medical Corp - 2013

< Back

Takes the user back to the Review and Dispute drilldown page (the AM/GPO table of search results)

Use the free-form text box to provide an explanation for dismissing the selected record(s). Comments in the text box can be up to 4,000 characters long (including spaces).

Replace "dismissal" with "resolution with no change"

**Add as first paragraph:**  
An applicable manufacturer or applicable GPO should select "Resolved No Change" to acknowledge that the applicable manufacturer or applicable GPO and the physician or teaching hospital have resolved the dispute in accordance with the guidance in the Final Rule. This action should only be taken when dispute resolution does not require a change to the data by the reporting entity.

**Keep text that starts (and start new paragraph) "Use the free-form text box..." and ends with "...4,000 characters long (including spaces)."**  
**THEN ADD:**  
For example, the explanation for the dispute that has been resolved with no change to the data could say: "This dispute is resolved with no changes made to the data because there is now agreement relating to the reported payment amount. The physician was able to verify that the payment amount of \$6,500 is correct. Therefore, we are moving forward with resolving the dispute without changing the data."  
**THEN PICK-UP AT TEXT:** Note: The reason for dispute...

Note: The reason for dismissal should be included in an email to the physician or teaching hospital who disputed the payment.

Select "Dismiss" after the record(s) selected for dispute dismissal. Once the record(s) is dismissed, the status will be "Dispute Dismissed."

Replace "Dismiss" with "Resolved No Change"

To return to the previous page, select "Cancel."

Replace "is dismissed" with "has been resolved with no change made to the data,"

Replace "Dispute Dismissed" with "Resolved No Change"

Sub-title to be changed to "Resolve the following disputes with no changes to the data"

Dispute ID	Record ID	Date of Payment	Amount	Recipient Name	Status	Attested	Attestation Date
12353464565	12353464565	11/11/2013	\$1,000.00	Marvin Johnson	Dispute Acknowledged	Attested	08/11/2014
12353464565	12353464565	11/11/2013	\$1,000.00	Jay Johnson	Dispute Acknowledged	Attested	08/11/2014
12353464565	12353464565	11/11/2013	\$1,000.00	Excellence Hospital	Dispute Acknowledged	Attested	08/11/2014
12353464565	12353464565	11/11/2013	\$1,000.00	Tanya Huang	Dispute Acknowledged	Attested	08/11/2014
12353464565	12353464565	11/11/2013	\$1,000.00	Marvin Johnson	Dispute Acknowledged	Attested	08/11/2014
12353464565	12353464565	11/11/2013	\$1,000.00	Marvin Johnson	Dispute Acknowledged	Attested	08/11/2014
12353464565	12353464565	11/11/2013	\$1,000.00	Jay Johnson	Dispute Acknowledged	Attested	08/11/2014
12353464565	12353464565	11/11/2013	\$1,000.00	Excellence Hospital	Dispute Acknowledged	Attested	08/11/2014
12353464565	12353464565	11/11/2013	\$1,000.00	Tanya Huang	Dispute Acknowledged	Attested	08/11/2014
12353464565	12353464565	11/11/2013	\$1,000.00	Marvin Johnson	Dispute Acknowledged	Attested	08/11/2014

List 1-10 records here before displaying in a scrollbox

\* Reason for dismissal

Title of box to be changed to "Reason for dispute resolution with no change to the data"

Wrap recipient names and give a max width to avoid issues with going off the page

Text area for Reason for dismissal

4,000 characters maximum

Cancel Dismiss

Cancel takes user back to the drill-down page, which displays again as if the action had not been taken. (See requirements for system actions). Upon change, take user back to the drill-down page with the new statuses.

## History of Disputes Page - AM/GPO

### Open Payments (Sunshine Act)

Reporting Entity

Home	Records View, Edit, Report	Review and Dispute View, Respond, Resolve	Manage Entities Register, Edit, Nominate Roles	My Profile Account, Roles, Nominations	Help
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Default sort on Dispute ID, then Date Dispute Modified  
(most recent at top within dispute ID listings)

### History of Disputes

Record ID 12333663368

< Back

Takes the user back to the Review and Dispute drilldown page (the AM/GPO table of search results)

Below is the history of all the dispute(s) made to this record and actions taken by the authorized users of the reporting entity in response to the dispute(s).

For more information about the review and dispute process, refer to the [Open Payments User Guide](#).

Dispute ID	Review and Dispute Status	Record Status	Amount (\$)	Date of Payment	Recipient	Date Dispute Initiated	Date Dispute Modified	Dispute Last Modified By	Record Last Modified By	Dispute Comments
2345678	Dispute Dismissed	Attested	\$500.00	10/11/2013	Johnson, Marvin	08/11/2014	09/05/2014	Harold Coley	Harold Coley	Here is an explanation comment for the entity's action; this is placeholder text for an example.
2345678	Dispute Initiated	Attested	\$500.00	10/11/2013	Johnson, Marvin	08/11/2014	09/05/2014	Margaret Lanham	Jay Asheton	Example of long comment text. Lorem ipsum dolor sit amet, verear deserunt lobortis at est. Ea primis appetere vix, id vel doctus comprehensam. Ei audiam animal intellegam eum, iriure alterum qualisque an nam. Eum ne utamur aliquando assentior. No mollis mediocritatem has, quot aliquip albus eu per. Ei enim audire cum. Duo elit homero sapientem ne, te eum nonumes verterem erroribus, sit et quot mutat everti. Eu ius noluisse suscipit invidunt. Est vidit porro oporteat ea. An sea brute atqui integre, cibo postea maiestatis duo ad.  Mea ea graece equidem. Qui discere constituam no. Usu no omittantur efficiantur. Ne vel hinc option, nam ad choro expetenda comprehensam, usu ad purto vituperata. Quem cetero quaerendum pri an. In noster commune ius, iuvaret ponderum mel an, pro te corpora facilisi. Adhuc docendi neglegentur an per. Vel reprimique dissentiet cu, te dicant deseruisse vituperata has. Modus aliquid reformidans eam ad, postulant consetetur te sed, invenire omittantur vis an. Graeco contentiones eam in, id rationibus posidonium pri. Nam tempor eligendi in. Stet sadipscng temporibus an sed, placerat mediocrem prodesset in vis.
1234567	Dispute Resolved	Ready for Submission	\$500.00	10/11/2013	Johnson, Marvin	10/11/2013	10/11/2013	Jay Asheton	Jay Asheton	
1234567	Dispute Initiated	Attested	\$5,000.00	10/11/2013	Johnson, Marvin	10/11/2013	10/11/2013	Margaret Lanham	Harold Coley	Example comment text. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam semper iaculis dolor, volutpat blandit velit malesuada eu. Morbi pellentesque elementum neque ac sodales. Donec viverra mauris non venenatis scelerisque. Nullam

"Review and Dispute Status" to be modified to show table column value with "Resolved No Change" as status instead of "Dispute Dismissed"

Wrap recipient names and give a max width to avoid issues with table going off the page

Note this is the cutoff of the approximate viewable area of the table without horizontal scrolling

Dispute ID Page - AM/GPO

# Open Payments (Sunshine Act)

Reporting Entity

Home	<b>Records</b> View, Edit, Report	<b>Review and Dispute</b> View, Respond, Resolve	<b>Manage Entities</b> Register, Edit, Nominate Roles	<b>My Profile</b> Account, Roles, Nominations	Help
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## Dispute ID 2345678

Record ID 12333663368

< Back

Takes the user back to the Review and Dispute drilldown page (the AM/GPO table of search results)

Below is the latest information about this dispute.

For more information about the review and dispute process, refer to the [Open Payments User Guide](#).

Review and Dispute Status	Record Status	Date Dispute Initiated	Date Dispute Last Modified	Dispute Last Modified By	Record Last Modified By	Comments
Dispute Dismissed	Attested	08/11/2014	09/05/2014	Harold Coley	Harold Coley	[Here is some text explaining the reason the entity dismissed the dispute.]

7. "Review and Dispute Status" to be modified to show table column value with "Resolved No Change" as status instead of "Dispute Dismissed"

# Open Payments (Sunshine Act)

## Reporting Entity

<b>Home</b>	<b>Records</b> View, Edit, Report	<b>Review and Dispute</b> View, Respond, Resolve	<b>Manage Entities</b> Register, Edit, Nominate Roles	<b>My Profile</b> Account, Roles, Nominations	<b>Help</b>
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## Record ID 12333663368

**Back**

Takes the user back to the Review and Dispute drilldown page (the AM/GPO table of search results)

Below are the details of the record.

Program Year	2013	Last Modified Date	08/11/2014 3:45 PM
Entity	Acme Medical Corporation	Last Modified By	Carla Brunetti
Payment Category	General	[Re]Submission Date	08/12/2014 1:45 PM
Consolidated Reporting	Yes	Submitted By	Jay Asheton
Home System Payment ID	A52353	Record Status	Attested
File ID	FileAAA	Override Status	Unmatched
		Associated Disputes and Statuses	123456- Dispute Initiated, 345566- Dispute Acknowledged

 Need Help with this website? [Contact Us by email.](#)

 Download the [Open Payments User Guide \(PDF\)](#)

### Recipient Demographic Information

Covered Recipient Type: Teaching Hospital  
 Teaching Hospital Name: THAbcName  
 Teaching Hospital Tax ID Number (TIN): 131313131  
 Recipient Business Street Address Line 1: 123 test Dr  
 Recipient Business Street Address Line 2: Apt #C  
 Recipient City: Ellicott City  
 Recipient State: Maryland  
 Recipient Zip Code: 21043-null  
 Recipient Country: United States  
 Recipient Province:  
 Recipient Postal Code:  
 Recipient Email Address: aa@aa.com

"Associated Disputes and Statuses" field to be modified to show "Resolved No Change" as status instead of "Dispute Dismissed"

### Associated Drug, Device, Biological, or Medical Supply Information

Product Indicator: Covered  
 Name of Associated Drug or Biological: dsas  
 National Drug Code of Associated Covered Drug or Biological: 123  
 Name of Associated Covered Device or Medical Supply: cscx

### Transfer of Value (Payment) Information

Total Amount of Payment : 1222  
 Date of Payment: Fri Jan 10 00:00:00 EST 2014  
 Number of Payments Included in Total Amount: 1  
 Form of Payment or Transfer of Value: Cash or cash equivalent  
 Nature of Payment or Transfer of Value: Consulting Fee

### General Record Information

Third Party Payment Recipient Indicator: Individual  
 Name of Third Party Entity Receiving Payment or Transfer of Value: abcgreen

Charity Indicator: No  
Third Party Equals Covered Recipient Indicator: No  
Delay in Publication of Research Payment Indicator: R & D on New Product  
Contextual Information: consult

**Back**

**Takes the user back to the Review and Dispute drilldown page (the AM/GPO table of search results)**

## Success Confirmation Alert msg after taking action - AM/GPO

# Open Payments (Sunshine Act)

Reporting Entity

<b>Home</b>	<b>Records</b> View, Edit, Report	<b>Review and Dispute</b> View, Respond, Resolve	<b>Manage Entities</b> Register, Edit, Nominate Roles	<b>My Profile</b> Account, Roles, Nominations	<b>Help</b>
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## Review and Dispute - Acme Medical Corporation - 2013

< Back

**You have successfully [acknowledged/dismissed] the following**  
 [11111111, 22222222, 33333333, 4444444, 55555555, 2314124, 5637523, 235  
 1241352436, 75437576, 2412414, 8983830 [list of all dispute numbers that were  
 The covered recipient(s) will receive a [dismissed] will be [dismissed].

Replace "dismissed" with "resolved with no change to the data"

Replace "dismissed" with "resolved with no change to the data"

Replace "dismissed" with "resolved with no change to the data"

This is an example of a top-of-page success alert displayed after taking most actions. We should set a max quantity for the display of any IDs.

The table below contains the records that have been disputed by a physician or teaching hospital. The filtering tools below can assist with customizing your view.

- Note: You may perform the following actions in relation to a disputed record.
- ~~Select "Dismiss Dispute" - To dismiss a dispute.~~
  - Select "Acknowledge Dispute" - To confirm that the applicable manufacturer or the disputed record.

Replace crossed out text with:  
 • Select "Resolved No Change" to acknowledge that the applicable manufacturer or applicable GPO and the physician or teaching hospital have resolved the dispute in accordance with the guidance in the Final Rule. This action should only be taken when dispute resolution does not require a change to the data by the reporting entity.

was hit as is not ted

To return to the previous page, select "Back."

For more information about the review and dispute process, refer to the [Open Payments User Guide](#).

For definitions of the data fields displayed on the Review and Dispute listings click [here](#).

better, the current text document - for the correct static on-screen instructions, links, datatable and search criteria.)

### Applicable Manufacturer or Applicable GPO's Disputed Records



## Physician Records Table Page

# Open Payments (Sunshine Act)

Physician

Home	Review and Dispute Review, Affirm, Dispute	My Profile Account, Roles, Nominations	Help
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### Review and Dispute - Marvin Johnson - 2013

Selected recipient and program year are shown.  
Wrap name to a second, single-spaced line if it exceeds the 2/3 column span

< Back | Takes the user back to the Overview page

The table below contains only the records reported for the selected physician during the selected program year.

The list is organized by the entity that made payments or transfers of value to the physician, or the entity in which the physician has ownership or investment interests.

Note: Only records that have been attested to by the applicable manufacturer or applicable GPO will be displayed. Records that have not been attested, or that are still being processed by the entity, will be made available for review once attestation has been completed.

The filtering tools below can assist with customizing your view.

Note: You may perform the following actions in relation to a record:

- Select "Affirm Record" – To confirm the payment or other transfer of value, or ownership or investment interest.
- Select "Dispute Record" – To dispute the payment or other transfer of value, or ownership or investment interest reported by the entity.
- Select "Withdraw Dispute" – To withdraw a disputed record, thereby indicating that the physician is no longer disputing the record.

To return to the previous page, select "Back."

For more information about the review and dispute process, refer to the [Open Payments User Guide](#).

[Read definitions of select data fields](#) displayed on the Review and Dispute listings.

### Physician Records

Entity Making Payment:

Record ID:

Date of Publication:

Dispute ID:

Review and Dispute Status:

Payment Category:  General  Research  Ownership or Investment Interest  No

Showing Results for: [All]

Show Entries

Select All	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	Review and Dispute Status	Date Dispute Initiated	Dispute Last Modified By	History of Disputes	Affirmed (Yes/No)	View Record
<input type="checkbox"/>	Acme Corp	565670		General	Stock	Gift	03/12/2013	\$100.00	No	10/29/2014 7:00 PM	Attested					Yes	<a href="#">View</a>
<input type="checkbox"/>	ABC Inc.	456788	23124	Research	Cash or Cash Equivalent	Grant	01/24/2013	\$10,000.00	Yes	10/28/2014 4:00 PM	Attested	Dispute Acknowledged	10/22/2014 4:00 PM	Peterson, Harold	<a href="#">View</a>	No	<a href="#">View</a>
<input type="checkbox"/>			14856	Research	Cash or Cash Equivalent	Grant	01/24/2013	\$10,000.00	Yes	10/28/2014 4:00 PM	Attested	Dispute Dismissed	10/15/2014 4:00 PM	White, John	<a href="#">View</a>	No	<a href="#">View</a>
<input type="checkbox"/>			12345	Research	Cash or Cash Equivalent	Grant	01/24/2013	\$10,000,000.00	Yes	10/28/2014 4:00 PM	Attested	Dispute Resolved	09/12/2014 2:00 PM	Garcia, Carmen	<a href="#">View</a>	No	<a href="#">View</a>
<input type="checkbox"/>	ABC Inc.	345667		General	Dividends	Royalty	10/21/2013	\$20,000.00	No	10/11/2014 7:00 PM	Attested					No	<a href="#">View</a>
<input type="checkbox"/>	Acme Corp	309876		General	Dividends	License	05/04/2013	\$1,121.23	No	10/01/2014 7:00 PM	Attested					No	<a href="#">View</a>
<input type="checkbox"/>	Acme Corp	234250	34243	Ownership or Investment Interest			11/23/2013	\$150,000.00	No	09/30/2014 2:00 PM	Withdrawn	Dispute Resolved	09/12/2014 4:00 PM	Smith, Carol B	<a href="#">View</a>	Yes	<a href="#">View</a>
<input type="checkbox"/>	ABC Inc.	200989	43575	General	In Processing	In Processing	In Processing	In Processing			In Processing					No	<a href="#">View</a>
<input type="checkbox"/>			24363	General	In Processing	In Processing	In Processing	In Processing			In Processing	Withdrawn	5:00 PM			No	<a href="#">View</a>

Showing 1-10 of [total # of results] entries [pagination widget if more than one page of data]

"Review and Dispute Status" drop-down to be modified to show "Resolved No Change" as status instead of "Dispute Dismissed"

This is the approximate cutoff of the viewable area of the table on the page. The page will scroll horizontally to allow the user to view the last several columns.

"Review and Dispute Status" to be modified to show table column value with "Resolved No Change" as status instead of "Dispute Dismissed"

Sort is by record's "Last Modified Date" then keep all disputes for each record grouped, with the most recent dispute for that record listed first.

Dispute ID takes user to the page for that dispute

Entity Making Payment and Record ID duplicate values are suppressed when the table is sorted to keep the disputes grouped in this way.

If the table is sorted in a way that breaks the grouping, restore the suppressed values to be visible. For instance if you sort the table on Dispute ID, each dispute's row will include the Record ID and Entity name.

Dispute Record, Affirm Record, and Withdraw Dispute buttons apply only to the selected (checked) records.

Selecting the Dispute Records button displays the Dispute Records page for the selected records.

Selecting the Affirm button goes to Affirm Records page

Selecting the Withdraw Dispute button shows the Withdraw Disputes page. It will only affect the dispute/s the user selected for that record. There might be other disputes listed for the record.

View takes the user to the History of Disputes page for that dispute. Do not display a View link for this column if there is no dispute to view.

In the Action column, View takes user to View-only version of Record page. If record cannot be viewed, such as b/c of status, show user the appropriate message such as shown on the "Record in Processing" page

## Dispute Records - Physician or Teaching Hospital

# Open Payments (Sunshine Act)

Physician

Home	<b>Review and Dispute</b> Review, Affirm, Dispute	<b>My Profile</b> Account, Roles, Nominations	Help
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## Dispute Records

A field with an asterick (\*) is required.

### Marvin Johnson - 2013

< Back

Takes the user back to the Review and Dispute drilldown page (the Physician or TH table of search results)

Use the free-form text box to provide an explanation for disputing the selected record(s). Comments in the text box can be up to 4,000 characters long (including spaces).

**Note:** The dispute comments will be sent in an email to the entity who reported the payment or other transfer of value, or ownership or investment interest.

Select "Send Dispute" after entering comments related to the record(s) selected for dispute. Once the dispute is initiated the status of each record will be displayed as "Dispute Initiated."

To return to the previous page, select "Cancel."

For more information about the review and dispute process, refer to the [Open Payments User Guide](#).

You have selected the following [5] record(s):

Record ID	Entity Making Payment	Date of Payment	Amount (\$)	Record Status	Review and Dispute Status
12353464565	Acme Medical	11/11/1111	\$1,000.00	Attested	
43636245893	Acme Inc.	11/11/1111	\$2,000.00	Attested	
64836743984	Ace Pharmaceutical	11/11/1111	\$ 600.00	Attested	Dispute Dismissed
43829257265	ABC Co.	11/11/1111	\$ 500.00	Attested	Dispute Resolved
93820976204	Grand Corporation with a Long Name	11/11/1111	\$4,000.00	Attested	

Maximum of 10 payments displayed in the list before we switch to displaying the payments in a scrolling box.

\* Reason for Dispute:

Wrap Entity Names and give a max width to avoid issues with table going off the page

"Review and Dispute Status" to be modified to show table column value with "Resolved No Change" as status instead of "Dispute Dismissed"

Text area for entering dispute reasons, with a vertical scrollbar on the right side.

4,000 characters maximum

Cancel

Send Dispute

Cancel discards any comments and takes user back to the drill-down page, which displays again as if the action had not been taken. Checked checkboxes remain checked.

Displays the Disputes Confirmation page

### Affirm Records - Physician or Teaching Hospital

# Open Payments (Sunshine Act)

Physician

Home	<b>Review and Dispute</b> Review, Affirm, Dispute	<b>My Profile</b> Account, Roles, Nominations		Help
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## Affirm Records

Marvin Johnson - 2013

< Back

Takes the user back to the Review and Dispute drilldown page (the Physician or TH table of search results)

Select "Affirm Records" to confirm the payments or other transfers of value, or ownership or investment interests reported by the entity are accurate and valid.

To return to the previous page, select "Cancel."

For more information about the review and dispute process, refer to the [Open Payments User Guide](#).

You are affirming the following [5] record(s):

Record ID	Entity Making Payment	Date of Payment	Amount (\$)	Record Status	Review and Dispute Status
12353464565	Acme Medical	11/11/2013	\$1,000.00	Attested	Dispute Resolved
43636245893	Acme Inc.	11/11/2013	\$2,000.00	Attested	
64836743984	Ace Pharmaceutical	11/11/2013	\$ 600.00	Attested	
43829257265	ABC Co.	11/11/2013	\$ 500.00	Attested	Dispute Dismissed
93820976204	Grand Corporation with a Long Name	11/11/2013	\$4,000.00	Attested	

Maximum of 10 records displayed in the list before we switch to displaying the payments in a scrolling box.

Wrap Entity Names and give a max width to avoid issues with table going off the page

Cancel

Affirm Records

"Review and Dispute Status" to be modified to show table column value with "Resolved No Change" as status instead of "Dispute Dismissed"

Cancel discards any comments and takes user back to the drill-down page, which displays again as if the action had not been taken. Checked checkboxes remain checked.

Displays Success message at top of drilldown table

### Withdraw Dispute - Physician or Teaching Hospital

# Open Payments (Sunshine Act)

Physician

<b>Home</b>	<b>Review and Dispute</b> Review, Affirm, Dispute	<b>My Profile</b> Account, Roles, Nominations	<b>Help</b>
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## Withdraw Disputes

Marvin Johnson - 2013

< Back

Takes the user back to the Review and Dispute drilldown page (the Physician or TH table of search results)

Select "Withdraw Disputes" to confirm the withdrawal of the selected disputed record(s). Once the dispute is withdrawn, the status of the record will be displayed as "Dispute Withdrawn."

To return to the previous page, select "Cancel."

For more information about the review and dispute process, refer to the [Open Payments User Guide](#).

You are withdrawing the following [5] dispute(s):

Dispute ID	Record ID	Date of Payment	Amount (\$)	Entity Making Payment	Review and Dispute Status	Record Status	Date Dispute Initiated
12345	11211	01-03-2013	\$123,567.00	Eli Lilly	Dispute Initiated	Attested	11/11/2013
23456	11211	05-03-2013	\$ 24,667.00	Pfizer	Dispute Acknowledged	Attested	11/11/2013
56256	11211	05-03-2013	\$ 23,456.00	MGM	Dispute Initiated	Attested	11/11/2013
54251	13456	06-07-2013	\$ 65,168.00	ABC Corp	Dispute Initiated	Attested	11/11/2013

Display up to 10 records as a list

"Review and Dispute Status" to be modified to show table column value with "Resolved No Change" as status instead of "Dispute Dismissed"

Wrap Names and give a max width to avoid issues with table going off the page

Withdraw Disputes

Cancel

Displays Success message at top of drilldown table

Cancel discards any comments and takes user back to the drill-down page, which displays again as if the action had not been taken. Checked checkboxes remain checked.

View Record for Physician or Teaching Hospital User

# Open Payments (Sunshine Act)

Physician

Home	<b>Review and Dispute</b> Review, Affirm, Dispute	<b>My Profile</b> Account, Roles, Nominations	Help
------	--	--	------

## Record ID 12333663368

**Back**

Takes the user back to the Review and Dispute drilldown page (the Physician or TH table of search results)

Below are the details of the record.

Program Year	2013	Last Modified Date	08/02/2014 3:45 PM
Entity	Acme Medical Corporation	Last Modified By	Carla Brunetti
Payment Category	Research	Record Status	Attested
Consolidated Reporting	Yes	<b>Associated Disputes and Statuses</b>	123456- Dispute Initiated, 345566- Dispute Acknowledged
[Re]Submission Date	08/04/2014 1:45 PM		
Submitted By	Jay Asheton		



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Download the [Open Payments User Guide \(PDF\)](#)

### Recipient Demographic Information

**Covered Recipient Type:** Teaching Hospital  
**Teaching Hospital Name:** THAbcName  
**Teaching Hospital Tax ID Number (TIN):** 131313131  
**Recipient Business Street Address Line 1:** 123 test Dr  
**Recipient Business Street Address Line 2:** Apt #C  
**Recipient City:** Ellicott City  
**Recipient State:** Maryland  
**Recipient Zip Code:** 21043-null  
**Recipient Country:** United States  
**Recipient Province:**  
**Recipient Postal Code:**  
**Recipient Email Address:** aa@aa.com

"Associated Disputes and Statuses" field to be modified to show "Resolved No Change" as status instead of "Dispute Dismissed"

### Associated Drug, Device, Biological, or Medical Supply Information

**Product Indicator:** Covered  
**Name of Associated Drug or Biological:** dsas  
**National Drug Code of Associated Covered Drug or Biological:** 123  
**Name of Associated Covered Device or Medical Supply:** cscx

### Transfer of Value (Payment) Information

**Total Amount of Payment :** 1222  
**Date of Payment:** Fri Jan 10 00:00:00 EST 2014  
**Number of Payments Included in Total Amount:** 1  
**Form of Payment or Transfer of Value:** Cash or cash equivalent  
**Nature of Payment or Transfer of Value:** Consulting Fee

### General Record Information

**Third Party Payment Recipient Indicator:** Individual  
**Name of Third Party Entity Receiving Payment or Transfer of Value:** abcgreen  
**Charity Indicator:** No  
**Third Party Equals Covered Recipient Indicator:** No  
**Delay in Publication of Research Payment Indicator:** R & D on New Product

Contextual Information: consult

**Back**

Takes the user back to the Review and Dispute drilldown page (the Physician or TH table of search results)

Dispute ID Page - Physician or Teaching Hospital

# Open Payments (Sunshine Act)

Physician

Home	<b>Review and Dispute</b> Review, Affirm, Dispute	<b>My Profile</b> Account, Roles, Nominations	Help
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## Dispute ID 2345678

Record ID 12333663368

< Back

Takes the user back to the Review and Dispute drilldown page (the Physician or TH table of search results)

Below is the latest information about this dispute.

For more information about the review and dispute process, refer to the [Open Payments User Guide](#).

Review and Dispute Status	Record Status	Date Dispute Initiated	Date Dispute Last Modified	Dispute Last Modified By	Record Last Modified By	Comments
Dispute Dismissed	Attested	10/04/2014	10/11/2014	Harold Coley	Harold Coley	[Here is some text explaining the reason the entity dismissed the dispute.]

8. "Review and Dispute Status" to be modified to show table column value with "Resolved No Change" as status instead of "Dispute Dismissed"

# Open Payments (Sunshine Act)

Physician

Home	<b>Review and Dispute</b> Review, Affirm, Dispute	<b>My Profile</b> Account, Roles, Nominations	Help
------	--	--	------

Default sort on Dispute ID, then Date Dispute Modified  
(most recent at top within dispute ID listings)

## History of Disputes

Record ID 12333663368

< Back

Takes the user back to the Review and Dispute drilldown page (the Physician or TH table of search results)

Note this is the cutoff of the approximate viewable area of the table without horizontal scrolling

Below is the history of all the dispute(s) made to this record and actions taken by the authorized users of the reporting entity in response to the dispute(s).

For more information about the review and dispute process, refer to the [Open Payments User Guide](#).

Dispute ID	Review and Dispute Status	Record Status	Payment Amount	Date of Payment	Entity Making Payment	Date Dispute Initiated	Date Dispute Modified	Dispute Last Modified By	Record Last Modified By	Dispute Comments
2345678	Dispute Dismissed	Attested	\$500.00	10/11/2013	Acme Medical	08/15/2014	08/30/2014	Harold Coley	Harold Coley	Here is an explanation comment for the entity's action it is placeholder text for an example.
2345678	Dispute Acknowledged	Attested	\$500.00	10/11/2013	Acme Medical	08/15/2014	08/24/2014	Harold Coley	Jay Asheton	Example of long comment text. Lorem ipsum dolor sit amet, verear deserunt lobortis at est. Ea primis appetere vix, id vel doctus comprehensam. Ei audiam animal intellegam eum, iriure alterum qualisque an nam. Eum ne utamur aliquando assentior. No mollis mediocritatem has, quot aliquip albus eu per. Ei enim audire cum. Duo elitr homero sapientem ne, te eum nonumes verterem erroribus, sit et quot mutat everti. Eu ius noluisse suscipit invidunt. Est vidit porro oporteat ea. An sea brute atqui integre, cibo postea maiestatis duo ad.
1234567	Dispute Resolved	Ready for Submission	\$500.00	10/11/2013	Acme Medical	08/01/2014	08/05/2014	Jay Asheton	Jay Asheton	Mea ea graece equidem. Qui discere constituam no. Usu no omittantur efficiantur. Ne vel hinc option, nam ad choro expetenda comprehensam, usu ad purto vituperata. Quem cetero quaerendum pri an. In noster commune ius, iuvaret ponderum mel an, pro te corpora facilisi. Adhuc docendi neglegentur an per. Vel reprimique dissentiet cu, te dicant deseruisse vituperata has. Modus aliquid reformidans eam ad, postulant consetetur te sed, invenire omittantur vis an. Graeco contentiones eam in, id rationibus posidonium pri. Nam tempor eligendi in. Stet sadipscing temporibus an sed, placerat mediocrem prodesset in vis. Duo elitr homero sapientem ne, te eum nonumes verterem erroribus, sit et quot mutat everti. Eu ius noluisse suscipit invidunt. Duo elitr homero sapientem reformidans.
1234567	Dispute Initiated	Attested	\$5,000.00	10/11/2013	Acme Medical	08/01/2014	08/01/2014	Margaret Lanham	Harold Coley	Example comment text. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam semper iaculis dolor, volutpat blandit velit malesuada eu. Morbi pellentesque elementum neque ac sodales. Donec viverra mauris non venenatis scelerisque. Nullam

"Review and Dispute Status" to be modified to show table column value with "Resolved No Change" as status instead of "Dispute Dismissed"



# Open Payments (Sunshine Act)

Teaching Hospital

- Home
- Review and Dispute  
Review, Affirm, Dispute
- Manage Hospitals  
View, Update
- My Profile  
Account, Roles, Nominations
- Help

## Review and Dispute - Excellence Hospital - 2013

Selected recipient and program year are shown

< Back

Takes the user back to the Overview page

Teaching Hospital recipient's table is the same as the physician's except that the Payment Category does not include the search or data value of "Ownership or Investment Interest"

The table below contains only the records reported for the selected teaching hospital during the selected program year.

The list is organized by the entity that made payments or transfers of value to the teaching hospital. Note: Only records that have been attested to by the applicable manufacturer or applicable GPO will be displayed. Records that have not been attested or that are still being processed by the entity will be made available for review once attestation has been completed.

The filtering tools below can assist with customizing your view.

Note: You may perform the following actions in relation to a record:

- Select "Affirm Record" – To confirm the payment or other transfer of value.
- Select "Dispute Record" – To dispute the payment or other transfer of value reported by the entity.
- Select "Withdraw Dispute" – To withdraw a disputed record, thereby indicating that the teaching hospital is no longer disputing the record.

To return to the previous page, select "Back."

For more information about the review and dispute process, refer to the [Open Payments User Guide](#).

Read definitions of select data fields displayed on the Review and Dispute listings.

### Teaching Hospital Records

Entity Making Payment:  Record ID:  Date of Publication:

Dispute ID:  Review and Dispute Status:  Payment Category:  General  Research  No

Showing Results for: [All.]

Show Entries:

Select All	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	Review and Dispute Status	Date Dispute Initiated	Dispute Last Modified By	History of Disputes	Affirmed (Yes/No)	View Record
<input type="checkbox"/>	Acme Corp	565670		General	Stock	Gift	03/12/2013	\$100.00	No	10/29/2014 7:00 PM	Attested					Yes	<a href="#">View</a>
<input type="checkbox"/>	ABC Inc.	456788	<a href="#">23124</a>	Research	Cash or Cash Equivalent	Grant	01/24/2013	\$10,000.00	Yes	10/28/2014 4:00 PM	Attested	Dispute Acknowledged	10/22/2014 4:00 PM	Ginn, Maurie	<a href="#">View</a>	No	<a href="#">View</a>
<input type="checkbox"/>			<a href="#">14856</a>	Research	Cash or Cash Equivalent	Grant	01/24/2013	\$10,000.00	Yes	10/28/2014 4:00 PM	Attested	Dispute Dismissed	10/15/2014 4:00 PM	White, John	<a href="#">View</a>	No	<a href="#">View</a>
<input type="checkbox"/>			<a href="#">12345</a>	Research	Cash or Cash Equivalent	Grant	01/24/2013	\$10,000,000.00	Yes	10/28/2014 4:00 PM	Attested	Dispute Resolved	09/12/2014 2:00 PM	Garcia, Carmen	<a href="#">View</a>	No	<a href="#">View</a>
<input type="checkbox"/>	ABC Inc.	345667		General	Dividends	Royalty	10/21/2013	\$20,000.00	No	10/11/2014 7:00 PM	Attested					No	<a href="#">View</a>
<input type="checkbox"/>	Acme Corp	309876		General	Dividends	License	05/04/2013	\$1,121.23	No	10/01/2014 7:00 PM	Attested					No	<a href="#">View</a>
<input type="checkbox"/>	Acme Corp	234250	<a href="#">34243</a>	General	Stock	Gift	11/23/2013	\$5,000.00	No	09/30/2014 2:00 PM	Withdrawn	Dispute Resolved	09/12/2014 4:00 PM	Desalva, Gerald	<a href="#">View</a>	Yes	<a href="#">View</a>
<input type="checkbox"/>	ABC Inc.	200989	<a href="#">43575</a>	General	In Processing	In Processing	In Processing	In Processing								No	<a href="#">View</a>
<input type="checkbox"/>			<a href="#">24363</a>	General	In Processing	In Processing	In Processing	In Processing				Withdrawn	3:00 PM	Helen		No	<a href="#">View</a>

"Review and Dispute Status" drop-down to be modified to show "Resolved No Change" as status instead of "Dispute Dismissed"

"Review and Dispute Status" to be modified to show table column value with "Resolved No Change" as status instead of "Dispute Dismissed"

Showing 1-10 of [total # of results] entries

[pagination widget if more than one page of data]

Sort is by record's "Last Modified Date" then keep all disputes for each record grouped, with the most recent dispute for that record listed first.

Dispute ID takes user to the page for that dispute

Entity Making Payment and Record ID duplicate values are suppressed when the table is sorted to keep the disputes grouped in this way.

If the table is sorted in a way that breaks the grouping, restore the suppressed values to be visible. For instance if you sort the table on Dispute ID, each dispute's row will include the Record ID and Entity name.

Dispute Record, Affirm Record, and Withdraw Dispute buttons apply only to the selected (checked) records.

Selecting the Dispute Records button displays the Dispute Records page for the selected records.

Selecting the Affirm button goes to Affirm Records page

Selecting the Withdraw Dispute button shows the Withdraw Disputes page. It will only affect the dispute/s the user selected for that record. There might be other disputes listed for the record.

View takes the user to the History of Disputes page for that dispute. Do not display a View link for this column if there is no dispute to view.

In the Action column, View takes user to View-only version of Record page. If record cannot be viewed, such as b/c of status, show user the appropriate message such as shown on the "Record in Processing" page

## **Email Correspondence to be Updated**

### **Dispute Initiated By the Physician or Teaching Hospital - EML\_RD\_002**

Email Conditions: The applicable manufacturer or applicable GPO (entity) shall receive an email when the physician or teaching hospital initiates a dispute of certain payments or transfers of value, or ownership or investment interests.

#### **Email Subject Line: Open Payments Dispute Initiated**

#### **Body:**

A dispute has been initiated in relation to a payment or other transfer of value, or ownership or investment interest reported by <INSERT ENTITY NAME> for the <INSERT PROGRAM YEAR> program year. The dispute was initiated regarding the following record:

- Record ID: XXXX [dynamic text]
- Payment or Other Transfer of Value Date: XXXX [dynamic text]
- Payment Amount or Dollar Amount Invested: XXXX [dynamic text]
- Payment Category: XXXX[dynamic text]
- Physician or Teaching Hospital Name: XXXX

Dispute ID: XXXX

#### Dispute Details

<Physician or Teaching Hospital Dispute Comments>

XX

You may acknowledge receipt of the dispute by logging into the Open Payments system, navigating to the “Review and Dispute” tab, and selecting “Acknowledge Dispute.” The physician or teaching hospital who initiated the dispute will receive an email acknowledging your receipt of the dispute.

You may review the details of the dispute by navigating to the “Review and Dispute” tab of the Open Payments system and searching for the disputed record using the Record ID or Dispute ID noted above. You may resolve the dispute by submitting and attesting to the corrected data. After reviewing the disputed information, if you determine that no change is required to the data, you may dismiss select “Resolved No Change” to acknowledge that your entity and the physician or teaching hospital have resolved the dispute in accordance with the guidance in the Final Review, -the dispute- or you may request the physician or teaching hospital who initiated the dispute to withdraw it. If you select “Resolved No Change,” this action should only be taken when dispute resolution does not require a change to the data by the reporting entity.

If you have questions or require any further information about this dispute, please contact <INSERT PHYSICIAN OR TEACHING HOSPITAL NAME> directly.

**Recipients:** submitter

**Dispute ~~Dismissed~~ Resolved With No Changes By the Applicable Manufacturer or Applicable Group Purchasing Organization (GPO) - EML\_RD\_004**

Email Conditions: The physician or teaching hospital shall receive an email when the applicable manufacturer or applicable GPO (entity) ~~dismisses~~ resolves the dispute of certain payments or transfers of value, or ownership or investment interests and makes no changes to the data.

Email Subject Line: Open Payments Dispute Resolved with No Change to Data~~Dismissed~~

**Body:**

<INSERT ENTITY NAME> has ~~dismissed~~ resolved your dispute (Dispute ID <XXXX>) regarding the following record, and has not made any change to the data:

- Record ID: XXXX [dynamic text]
- Payment or Other Transfer of Value Date: XXXX [dynamic text]
- Payment Amount or Dollar Amount Invested: XXXX [dynamic text]
- Payment Category: XXXX [dynamic text]

<INSERT ENTITY NAME> specified the following reason(s) for resolving the dispute without changing the data~~dismissal~~:

<Reason for Dispute Resolution With No Change to the Data ~~Dismissal~~ Comments>

XX

You may view the updated status of this record by logging into the Open Payments system and navigating to the "Review and Dispute" tab. Note that the applicable manufacturer or applicable GPO has selected "Resolved No Change" to acknowledge that they believe that they resolved the dispute with you in accordance with the guidance in the Final Rule. If you disagree with this dispute resolution that does not require a change to the data by the reporting entity~~dismissal~~, you may dispute this transaction again.

If you have questions pertaining to this dispute, please contact <INSERT ENTITY NAME> directly.

**Recipients:** physician, physician authorized representative, teaching hospital authorized official, teaching hospital authorized representative.