

# Open Payments Reporting Entity Registration and Nominations PRA

The screenshots below illustrate the differences in physician and non-physician practitioner (NPP) registration between Open Payments System 1.0 and Open Payments System 2.0.

## Creating an Open Payments Profile as a Reporting Entity (First Time System Users)

**Step 1:** Log in to the Open Payments system at <https://openpayments.system.cms.gov> using your IDM credentials and agree to the Terms and Conditions.

When you are finished, select **Create My Profile**.

**Figure 1: Open Payments System Landing Page for first-time system users (OPS1.0)**

**Welcome to the Open Payments System**

*Our records indicate that you have not yet registered in the Open Payments system. Before you can perform any actions in the system, you must first create your profile and complete the registration process.*

**Create My Profile**

- Access** the Open Payments User Guide
- Need help with the website? **Contact Us** by email
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### Getting Started

Open Payments is a national disclosure program that promotes transparency by publishing information about the financial relationships between applicable manufacturers and applicable group purchasing organizations (GPOs) and healthcare providers (physicians, non-physician practitioners, and teaching hospitals) on a publicly accessible website. The Open Payments system requires the annual reporting of these relationships to CMS (42 CFR Parts 402 and 403).

**Figure 2: Open Payments System Landing Page for first-time system users (OPS2.0)**

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Open Payments is a national disclosure program that promotes transparency by publishing information about the financial relationships between applicable manufacturers and applicable group purchasing organizations (GPOs) and healthcare providers (physicians, non-physician practitioners, and teaching hospitals) on a publicly accessible website.

The Open Payments system requires the annual reporting of these relationships to CMS ([42 CFR Part 403 Subpart I](#)).

**⚠ Create Profile**

Our records indicate that you have not yet created a profile in the Open Payments system. Before you can perform any actions in the system, you must first create your profile and complete the registration process.

**Create Profile**

**Step 2:** The on-screen text contains important information regarding creating the reporting entity and individual profile. Read the on-screen text and select **Start Profile** at the bottom of the page when you are ready to continue.

**Figure 3: Create Profile Page (OPS1.0)**

### Create Profile

- 1 Select Profile Type
- 2 Register Entity
- 3 Personal Information
- 4 Review and Submit Profile

**Access** the Open Payments User Guide

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**Review** the Open Payments Privacy Policy [PDF]

## Create Profile

To begin creating a profile and registering in the Open Payments system, you must identify your affiliation with an applicable manufacturer, applicable group purchasing organization (GPO), teaching hospital, physician, or non-physician practitioner. Users with provider type of Physician Assistant, Nurse Practitioner, Clinical Nurse Specialist, Certified Registered Nurse Anesthetist, Certified Nurse-Midwife, or Anesthesiologist Assistant are called Non-Physician Practitioner in the Open Payments system.

If the applicable manufacturer, applicable GPO, teaching hospital, physician, or non-physician practitioner has not registered in the Open Payments system, you may register them and then yourself.

For reporting entities, prior to beginning registration, collect the information required for reporting entity registration, then proceed with the registration process.

For reporting teaching hospital, physician, or non-physician practitioner registration, prior to beginning registration, collect the information required for covered recipient registration, then proceed with the registration process.

If the applicable manufacturer, applicable GPO, teaching hospital, physician, or non-physician practitioner has already been registered in the Open Payments system and you have not affiliated with them in the Open Payments system, you may:

- Ask a user already affiliated with the reporting entity or covered recipient to nominate you for a user role; or
- Create a personal profile and request a role with the reporting entity or covered recipient user. Note that users who wish to associate themselves with physicians or non-physician practitioner must be nominated by the physician or non-physician practitioner.

**Figure 4: Create Profile Page (OPS2.0)**

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## Create Profile

### Creating a Profile

To begin creating a profile and registering in the Open Payments system, you must identify your affiliation with an applicable manufacturer, applicable group purchasing organization (GPO), teaching hospital, physician, or non-physician practitioner. Users with provider type of Physician Assistant, Nurse Practitioner, Clinical Nurse Specialist, Certified Registered Nurse Anesthetist, Certified Nurse-Midwife, or Anesthesiologist Assistant are called Non-Physician Practitioners in the Open Payments system.

For reporting entities, prior to beginning registration, collect the information required for reporting entity registration, then proceed with the registration process.

For reporting teaching hospital, physician, or non-physician practitioner registration, prior to beginning registration, collect the information required for covered recipient registration, then proceed with the registration process.

If the applicable manufacturer, applicable GPO, teaching hospital, physician, or non-physician practitioner has already been registered in the Open Payments system and you have not affiliated with them in the Open Payments system, you may:

- Ask a user already affiliated with the reporting entity or covered recipient to nominate you for a user role; or
- Create a personal profile and request a role with the reporting entity or covered recipient user. Note that users who wish to associate themselves with physicians or non-physician practitioners must be nominated by the physician or non-physician practitioner.

**Step 3:** Select the profile type **Applicable manufacturer or applicable group purchasing organization (GPO)** and then select **Continue**.

**Figure 5: Select Profile Type Page (OPS1.0)**

**Create Profile**

- Select Profile Type**
- Register Entity
- Personal Information
- Review and Submit Profile

Access the Open Payments User Guide

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## Select Profile Type

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

If you received a nomination ID and/or registration ID in an email notifying you of your nomination for a user role, begin creating your profile by selecting the "I have a Nomination ID and/or a Registration ID" link.

If you did not receive a nomination ID and/or a registration ID in an email, begin creating your profile by indicating whether you are a reporting entity or covered recipient.

Note: If you are a physician who works at a teaching hospital and wish to see data related to you in your capacity as a physician, select the "Physician or Non-Physician Practitioner" option when registering. Registering as a user affiliated with a teaching hospital will allow you to see only data related to that teaching hospital and not your records. You may register as both a physician and a user affiliated with a teaching hospital if needed.

If you have any questions regarding the user type you should register as, please contact the Open Payments Help Desk [openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov) for guidance.

**\* Required: Select the type of entity or covered recipient you are affiliated with OR the "I have a Nomination ID and/or a Registration ID" link.**

Applicable manufacturer or applicable group purchasing organization (GPO)

Physician or Non-Physician Practitioner

Teaching hospital

----- OR -----

[I have a Nomination ID and/or a Registration ID](#)

**Cancel** **Continue**

**Figure 6: Select Profile Type Page (OPS2.0)**

**Create Profile**

- Select Profile Type**
- Register Entity
- Personal Information
- Review and Submit Profile

## Select a Profile Type

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

If you received a nomination ID and/or registration ID in an email notifying you of your nomination for a user role, begin creating your profile by selecting the "I have a Nomination ID and/or a Registration ID" link.

If you did not receive a nomination ID and/or a registration ID in an email, begin creating your profile by indicating whether you are a reporting entity or covered recipient.

**Note:** If you are a physician who works at a teaching hospital and wish to see data related to you in your capacity as a physician, select the "Physician or Non-Physician Practitioner" option when registering. Registering as a user affiliated with a teaching hospital will allow you to see only data related to that teaching hospital and not your records. You may register as both a physician and a user affiliated with a teaching hospital if needed.

If you have any questions regarding the user type you should register as, please contact the Open Payments Help Desk [openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov) for guidance.

**\* Required: Select the type of entity or covered recipient you are affiliated with OR the "I have a Nomination ID and/or a Registration ID" \***

I have a Nomination ID and/or a Registration ID

Applicable Manufacturer or applicable Group Purchasing Organization (GPO)

Physician or Non-Physician Practitioner

Teaching hospital

**Cancel** **Continue**

**Step 4:** Once your entity type is selected, provide the reporting entity's 9-digit Taxpayer Identification Number/Employer Identification Number (TIN/EIN) and select **Find Entity**.

**Figure 7: Find and Entity Page (OPS1.0)**

### Create Profile

- ✓ Select Profile Type
- 2 Register Entity**
- 3 Personal Information
- 4 Review and Submit Profile

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## Find an Entity

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

To find an entity in the Open Payments system, enter the entity's Taxpayer Identification Number (TIN)/Employer Identification Number (EIN) below.

### If the Entity's TIN/EIN Is Not Found

If the TIN/EIN entered does not return any results, the entity has not yet been registered within the Open Payments system. An Officer must register the entity by selecting the "Register Your Entity on Open Payments" link. Note: The Officer must also register themselves for the officer user role when registering an entity. You may hold more than one user role.

### If the Entity's TIN/EIN Is Found

If the TIN/EIN search returns results, check the results to see if the entity you wish to register with is listed. If the entity is not listed, an Officer must register the entity by selecting "Other." If the search results contain the entity you wish to associate yourself with, you may select that entity and proceed with creating your personal profile and nominating yourself for a role with that entity.

Required: Enter the TIN/EIN of the entity.

**\*Enter TIN/EIN:**  
99-9999999  
 **Find**

[Register your Entity on Open Payments](#)

**Cancel** **Back**

**Figure 8: Find and Entity Page (OPS2.0)**

### Create Profile

- 1 Select Profile Type ✓
- 2 Register Entity**
- 3 Personal Information
- 4 Review and Submit Profile

- Find an entity
- Your Roles
- Nominate Additional Roles

## Find an Entity

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

To find an entity in the Open Payments system, enter the entity's Taxpayer Identification Number (TIN)/Employer Identification Number (EIN) below.

**TIN/EIN**

**If the Entity's TIN/EIN is Not Found** ✖

If the TIN/EIN entered does not return any results, the entity has not yet been registered within the Open Payments system. You may register the entity by selecting the "Register Your Entity on Open Payments" link. Note: You must also register yourself as the officer user role when registering an entity. You may hold more than one user role.

**If the Entity's TIN/EIN is Found** ✔

If the TIN/EIN search returns results, check the results to see if the entity you wish to register with is listed. If the entity is not listed, you may register the entity by selecting "Other". If the search result contain the entity you wish to associate yourself with, you may select that entity and proceed with creating your personal profile and nominating yourself for a role with that entity.

**\* Enter TIN/EIN of the entity:** (12-1234567)

**Find Entity**

**Back** **Cancel**

Step 5: The system will perform a search for the TIN/EIN you entered to determine if it has already been registered in the Open Payments system.

**Figure 9: Find an Entity Page (OPS1.0)**

**Create Profile**

- Select Profile Type
- 2 Register Entity**
- 3 Personal Information
- 4 Review and Submit Profile

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## Find an Entity

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

To find an entity in the Open Payments system, enter the entity's Taxpayer Identification Number (TIN)/Employer Identification Number (EIN) below.

### If the Entity's TIN/EIN Is Not Found

If the TIN/EIN entered does not return any results, the entity has not yet been registered within the Open Payments system. An Officer must register the entity by selecting the "Register Your Entity on Open Payments" link. Note: The Officer must also register themselves for the officer user role when registering an entity. You may hold more than one user role.

### If the Entity's TIN/EIN Is Found

If the TIN/EIN search returns results, check the results to see if the entity you wish to register with is listed. If the entity is not listed, an Officer must register the entity by selecting "Other." If the search results contain the entity you wish to associate yourself with, you may select that entity and proceed with creating your personal profile and nominating yourself for a role with that entity.

Required: Enter the TIN/EIN of the entity.

\*Enter TIN/EIN:  
99-9999999  
35-9820148 **Find**

**No entity with that TIN/EIN is registered on Open Payments**

[Register your Entity on Open Payments](#)

**Cancel** **Back**

**Figure 10: Find an Entity Page (OPS2.0)**

**1 Select Profile Type** ✓

**2 Register Entity**

- Find an entity**
- Your Roles
- Nominate Additional Roles

**3 Personal Information**

**4 Review and Submit Profile**

## Find an Entity

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

To find an entity in the Open Payments system, enter the entity's Taxpayer Identification Number (TIN)/Employer Identification Number (EIN) below.

**TIN/EIN**

### If the Entity's TIN/EIN is Not Found ✖

If the TIN/EIN entered does not return any results, the entity has not yet been registered within the Open Payments system. You may register the entity by selecting the "Register Your Entity on Open Payments" link. Note: You must also register yourself as the officer user role when registering an entity. You may hold more than one user role.

### If the Entity's TIN/EIN is Found ✔

If the TIN/EIN search returns results, check the results to see if the entity you wish to register with is listed. If the entity is not listed, you may register the entity by selecting "Other". If the search result contain the entity you wish to associate yourself with, you may select that entity and proceed with creating your personal profile and nominating yourself for a role with that entity.

**No entity with that TIN/EIN is registered on Open Payments.**

\* Enter TIN/EIN of the entity: (12-1234567)

52-7862148 **Find Entity** **Register your Entity on Open Payments**

**Back** **Cancel**

Step 6: Enter the reporting entity's information. All required fields will be marked with an asterisk (\*). You will not be able to proceed with registration until all the required fields have been entered.

**Figure11a: Register Entity Page (PART 1/4) (OPS1.0)**

### Create Profile

- ✓ Select Profile Type
- ② Register Entity
- Entity Information**
- Your Roles
- Nominate Additional Roles
- ③ Personal Information
- ④ Review and Submit Profile

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## Register Entity

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

Complete the information below to create a profile for an applicable manufacturer or applicable GPO.

**\*Entity's Legal Name:**

**\*Reporting Entity Type:**  
 Applicable Manufacturer  
 Group Purchasing Organization

**\*Business Type:**

**Food & Drug Administration (FDA) Establishment Identifier:**  
This is a 10-digit number

**Data Universal Numbering System (D-U-N-S® Number):**  
This is a 9-digit number

**\*URL of Parent Company:**  
http://www. or https://www. or www

## Figure11b: Register Entity Page (PART 2/4) (OPS1.0)

### Business Address

Enter the business address below.

**\*Country:**  
United States

**\*Business Address, Line 1:**  
123 chicken st

**Business Address, Line 2:**

**\*City Name:** Haymarket **\*State:** Virginia

**\*Zip Code:** 99999 9999  
20169

**\*Business Telephone Number:** 999-999-9999  
210-602-4955

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### Business Ownership Information

Enter the business ownership information below.

**\*Type of Ownership:**  
Sole Proprietorship

**\*Taxpayer Identifier Number (TIN)/Employer Identification Number (EIN):**  
99-9999999  
35-9820148

**\*Doing Business As (DBA) Name:**  
Dan's Medical Supply

**Figure11d: Register Entity Page (PART 3/4) (OPS1.0)**

\*Will this entity's information be submitted in a consolidated report (i.e., one entity reports on behalf of another entity)?

- Yes, my entity's data will be submitted in a consolidated report
- No, my entity's data will not be submitted in a consolidated report
- I don't know whether my entity's data will be submitted in a consolidated report

### Points of Contact

The two identified points of contact will receive important notification emails regarding Open Payments.

Being entered as a point of contact does not register that individual in the Open Payments system or give that individual access to the system. Individuals must be registered in the system if they want to access the Open Payments system.

### Primary Point of Contact

\*Name:

John Smith

\*Business Telephone Number:

999-999-9999 or Maximum 20 digits

526-845-5214

\*Title at the Entity:

Admin

\*Business Email Address:

js@hghj.com

### Backup Point of Contact

\*Name:

Joe Smith

\*Business Telephone Number:

999-999-9999 or Maximum 20 digits

521-574-5214

\*Title at the Entity:

Admin

\*Business Email Address:

js@yjgyjk.com



**Figure11d: Register Entity Page (PART 3/4) (OPS1.0)**

### Contact Information for Review and Dispute

In the "Review and Dispute Primary Point of Contact" and "Review and Dispute Backup Point of Contact" fields below, provide the contact information for up to two individuals from your entity who will be assisting with the dispute resolution process.

Note: The contents of the "Review and Dispute Primary Point of Contact" and "Review and Dispute Backup Point of Contact" fields will be visible to the covered recipients associated with the records during the review process. The contents will be displayed exactly as entered in these fields.

#### Review and Dispute Primary Point of Contact

<b>*Name:</b>	<b>Title at the Entity:</b>
<input type="text" value="Mary Jones"/>	<input type="text" value="Admin"/>
<b>*Business Telephone Number:</b> 999-999-9999 or Maximum 20 digits	<b>Business Telephone Extension:</b> Maximum 10 digits
<input type="text" value="248-842-6035"/>	<input type="text"/>
<b>*Business Email Address:</b>	
<input type="text" value="mj@khghjkgghjkl.com"/>	

#### Review and Dispute Backup Point of Contact

<b>Name:</b>	<b>Title at the Entity:</b>
<input type="text"/>	<input type="text"/>
<b>Business Telephone Number:</b> 999-999-9999 or Maximum 20 digits	<b>Business Telephone Extension:</b> Maximum 10 digits
<input type="text"/>	<input type="text"/>
<b>Business Email Address:</b>	
<input type="text"/>	

**Figure 12: Register Entity Page (OPS2.0)**

## Create Profile

- 1 Select Profile Type ✔
- 2 Register Entity
  - Registration Information
  - Entity Information
  - Business Information
  - Points Of Contact
  - Contact Information
  - Your Roles
  - Nominate Additional Roles
- 3 Personal Information
- 4 Review and Submit Profile

### Entity Information

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

Complete the information below to create a profile for an applicable manufacturer or applicable GPO.

**Entity's Legal Name \***

**Reporting Entity Type \***

Applicable Manufacturer  
 Group Purchasing Organization

**Business Type \***

**Food & Drug Administration (FDA) Establishment Identifier**

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

**Figure 13a: Register Entity Page (TOP PART) (OPS2.0)**

The screenshot shows the 'Create Profile' page with the 'Business Information' section active. The left sidebar contains a navigation menu with four main steps: 1. Select Profile Type (checked), 2. Register Entity (active), 3. Personal Information, and 4. Review and Submit Profile. Under 'Register Entity', there are sub-sections: Registration Information (Entity Information checked), Business Information (active), Points Of Contact, and Contact Information. Below these are 'Your Roles' and 'Nominate Additional Roles'. The main content area is titled 'Business Information' and includes a note: 'A field with an asterisk (\*) is required.' The 'Business Address' section prompts the user to 'Enter the business address below' and contains the following fields: 'Country' (dropdown menu with 'United States' selected), 'Business Address, Line 1' (text input with '428 Hayne St'), 'City' (text input with 'Walkin'), 'Zip Code' (text input with '85001'), 'Zip Extension' (text input with 'XXXX'), 'Business Address, Line 2' (text input with 'Business Address, Line 2'), 'State' (dropdown menu with 'Arizona' selected), and 'Business Telephone Number' (text input with '210-278-9999').

**Figure 13b: Register Entity Page (BOTTOM PART) (OPS2.0)**

The screenshot shows the 'Business Ownership Information' section. It prompts the user to 'Enter the business ownership information below.' The fields include: 'Type of Ownership' (dropdown menu with 'Sole Partnership' selected), 'TIN/EIN' (text input with '52-7862148'), and 'Doing Business As (DBA) Name' (text input with 'Mike's Medical Supply'). Below these fields is a question: 'Will this entity's information be submitted in a consolidated report (i.e., one entity reports on behalf of another entity)?' with three radio button options: 'Yes, my entity's data will be submitted in a consolidated report', 'No, my entity's data will not be submitted in a consolidated report', and 'I don't know whether my entity's data will be submitted in a consolidated report' (which is selected). At the bottom of the form are three buttons: 'Back', 'Cancel', and 'Continue'.

**Figure 14: Register Entity Page (OPS2.0)**

Create Profile

**Points Of Contact**

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

The two identified points of contact will receive important notification emails regarding Open Payments.

Being entered as a point of contact does not register that individual in the Open Payments system or give that individual access to the system. Individuals must be registered in the system if they want to access the Open Payments system.

**Primary Point of Contact**

Name \* Business Telephone Number \*

Sam Smith 254-856-2025

Entity Title \* Email Address \*

Admin ss@hdsjkdjhgjdj.com

**Backup Point of Contact**

Name \* Business Telephone Number \*

Jane Stevens 452-147-5036

Entity Title \* Email Address \*

Admin js@jedhjk.com

Back Cancel Continue

**Figure 15: Register Entity Page (OPS2.0)**

Create Profile

**Contact Information for Review and Dispute**

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

In the "Review and Dispute Primary Point of Contact" and "Review and Dispute Backup Point of Contact" fields below, provide the contact information for up to two individuals from your entity who will be assisting with the dispute resolution process.

Note: The contents of the "Review and Dispute Primary Point of Contact" and "Review and Dispute Backup Point of Contact" fields will be visible to the covered recipients associated with the records during the review process. The contents will be displayed exactly as entered in these fields.

**Review and Dispute Primary Point of Contact**

Name \* Business Telephone Number \*

Doug Mitchell 351-478-5213

Title at the Entity \* Email Address \*

Admin dm@dkljghjkr.com

**Review and Dispute Backup Point of Contact**

Name Business Telephone Number

XXX-XXX-XXXX

Entity Title Email Address

email@email.com


Back Cancel Continue


**Step 7:** Enter the required information and select the entity user roles **you** will be holding


**Figure16a: Your Role Page (TOP PART) (OPS1.0)**

**Create Profile**

- ✓ Select Profile Type
- ② Register Entity
  - ✓ Entity Information
  - Your Roles**
  - Nominate Additional Roles
- ③ Personal Information
- ④ Review and Submit Profile

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## Your Role

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

Select your user role(s) below. Note that the individual who registers an entity must register for the officer user role. You may hold more than one user role.

An entity may have a maximum of 12 active users, with up to 5 users in an officer role and up to 2 users in the compliance role. You may nominate other users on the next screen or after registration is complete.

The user roles are as follows:

### Officer:

- Updates the applicable manufacturer or applicable GPO profile information and can approve and modify nominations for user roles.
- Can deactivate other users from the entity.
- Can review and download compliance messages on behalf of the applicable manufacturer or applicable GPO.

### Submitter:

- Submits and edits payment information on behalf of the applicable manufacturer or applicable GPO.
- The submitter role can be held by individuals from third-party entities who submit records on behalf of the applicable manufacturer or applicable GPO.

### Attester:

- Attests to the accuracy, completeness, and timeliness of the data submitted for the applicable manufacturer or applicable GPO.
- Can submit assumptions made in the reporting of payments, other transfers of value, or ownership or investment interests.

### Compliance

- Can review and download compliance messages on behalf of the applicable manufacturer or applicable GPO.

**Figure16b: Your Role Page (BOTTOM PART) (OPS1.0)**

Your first name and last name have been prepopulated from your CMS Identity Management system (IDM) profile. You may edit these fields as needed. However, changing this information in Open Payments will not change the corresponding information in your IDM profile. Enter in your business email and business telephone number, select the role(s) you wish to hold, and select the "Continue" button.

<b>*First Name:</b> Dan	<b>Middle Name:</b> 
<b>*Last Name:</b> Mertz	<b>Suffix (Jr., Sr., etc.):</b> 
<b>*Business Email Address:</b> dm@hjsdfgkls.com	<b>*Business Telephone Number:</b> 999-999-9999 or Maximum 20 digits 215-759-5301

Indicate the role(s) you will hold in the Open Payments system. Only an officer may manage the access level of attesters, submitters and compliance role.


**Highest Level of Role**  
 Officer

**Reporting-related Roles**  
 Submitter  
 Attester

**Compliance-related Roles**  
 Compliance

Cancel Back Continue

**Figure17a: Your Role Page (TOP PART) (OPS2.0)**



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## Create Profile

- 1 Select Profile Type ✓
- 2 Register Entity ✓
  - Registration Information ✓
  - Entity Information ✓
  - Business Information ✓
  - Points Of Contact ✓
  - Contact Information ✓
  - Your Roles**
  - Nominate Additional Roles
- 3 Personal Information
- 4 Review and Submit Profile

### Your Role

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

Select your user role(s) below. **Note that the individual who registers an entity must register for the officer user role.** You may hold more than one user role.

An entity may have a **maximum of 12 active users**, with up to **5 users in an officer role** and up to **2 users in the compliance role**. You may nominate other users on the next screen or after registration is complete.

The user roles are as follows:
+

**i** Your first name and last name have been pre-populated from your CMS Identity Management system (IDM) profile. You may edit these fields as needed. However, changing this information in Open Payments will not change the corresponding information in your IDM profile. Enter your business email and business telephone number, select the role(s) you wish to hold, and select the "Continue" button.

<b>First Name *</b> Dan	<b>Middle Name</b> 
<b>Last Name *</b> Mertz	<b>Suffix (Jr., Sr., etc.)</b> 
<b>Email Address *</b> dm@hjsdfgkjl.com	<b>Business Telephone Number *</b> 521-785-6324

**Figure17b: Your Role Page (BOTTOM PART) (OPS2.0)**

Indicate the role(s) you will hold in the Open Payments system.  
**Only an officer may manage the access level of attesters, submitters and compliance role.**

\* Highest Level of Role:  
 Officer

Reporting-related Roles:  
 Submitter  
 Attester

Compliance-related Roles:  
 Compliance

Back Cancel Continue

**Step 9: At least one individual must be identified for officer, submitter, and attester roles in the Open Payments system during initial entity registration.** The system will not allow you to proceed without at least one individual associated with each user role except compliance. The system will allow registering an entity without assigning a user for the compliance role.

**Figure18: Applicable Manufacturer or Applicable GPO: Nominate Additional Roles Page (OPS1.0)**

**Create Profile**

- ✓ Select Profile Type
- ② Register Entity
  - ✓ Entity Information
  - ✓ Your Roles
  - Nominate Additional Roles**
- ③ Personal Information
- ④ Review and Submit Profile

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## Applicable Manufacturer or Applicable GPO: Nominate Additional Roles

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

You may nominate other individuals for user roles with your reporting entity now or at a later time. An entity may have a maximum of 12 active users, with 5 users in an officer role and up to 2 users in the compliance role.

**Officer:**

- Updates the applicable manufacturer or applicable GPO profile information and can approve and modify nominations for user roles.
- Can deactivate other users from the entity.
- Can review and download compliance messages on behalf of the applicable manufacturer or applicable GPO.

**Submitter:**

- Submits and edits payment information on behalf of the applicable manufacturer or applicable GPO.
- The submitter role can be held by individuals from third-party entities who submit records on behalf of the applicable manufacturer or applicable GPO.

**Attester:**

- Attests to the accuracy, completeness, and timeliness of the data submitted for the applicable manufacturer or applicable GPO.
- Can submit assumptions made in the reporting of payments, other transfers of value, or ownership or investment interests.

**Compliance**

- Can review and download compliance messages on behalf of the applicable manufacturer or applicable GPO.

Role:	First Name:	Last Name:	Business Email Address:	Business Telephone Number:	Actions:
Officer, Submitter, Attester	Dan	Mertz	dm@hjsdfgkls.com	215-759-5301	(YOU)

Add

**Figure19: Applicable Manufacturer or Applicable GPO: Nominate Additional Roles Page (OPS2.0)**

**Create Profile**

- Select Profile Type
- Register Entity
  - Registration Information
  - Entity Information
  - Business Information
  - Points Of Contact
  - Contact Information
  - Your Roles
  - Nominate Additional Roles**
- Personal Information
- Review and Submit Profile

### Nominate Additional Roles

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

You may nominate other individuals for user roles with your Reporting Entity now or at a later time. An Entity may have a maximum of 12 active users, with 5 users in an Officer role and up to 2 users in the Compliance role.

**The user roles are as follows:**

Role	First Name	Last Name	Business Email Address	Business Telephone Number	Actions
Officer, Attester, Submitter	Dan	Mertz	dm@hjsdfgkl.com	521-785-6324	(YOU)

**Nominate an Additional Role**

[Back](#) [Cancel](#) [Continue](#)

**Step 10:** Review any pre-populated information for accuracy and enter other personal information. Required fields are marked with an asterisk (\*). You will not be able to proceed with registration until all the required fields have been completed. Once your personal information has been entered, select **Continue**.

**Figure 20a: Enter Personal Information Page (TOP PART) (OPS1.0)**

### Enter Personal Information

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

Provide personal and business information below to create your user profile.

Your first name and last name have been prepopulated from your CMS Identity Management system (IDM) profile. You may edit the prepopulated fields as needed. However, changing this information in Open Payments will not change the corresponding information in your IDM profile.

Once you have entered the information, select the "Continue" button.

**Your Name**

\*First Name:

\*Last Name:

Middle Name:

Suffix (Jr., Sr., etc.):

**Figure 20b: Enter Personal Information Page (BOTTOM PART) (OPS1.0)**

**Your Business Contact Information**  
Enter your business or entity information.

\*Business Email Address: dm@ghlhkg.com      \*Job Title: Administrator

\*Country: United States

\*Business Address, Line 1: 56 Robert Street

Business Address, Line 2:

\*City Name: Axe      \*State: Texas

\*Zip Code: 99999 78244      \*Business Telephone Number: 999-999-9999 210-602-4955

Cancel      Back      Continue

**Figure 21a: Enter Personal Information Page (TOP PART) (OPS2.0)**

**OPEN PAYMENTS**      Home      About Us      Resources      Contact Us

**Create Profile**

1 Select Profile Type ✓  
2 Register Entity ✓  
3 Personal Information ✓

**Personal Information**  
A field with an asterisk (\*) is required.  
Add the requested personal and business information to your user profile. Some fields are pre-populated. Review pre-populated information for accuracy and correct any invalid information.

Note that any changes made here will not automatically update your profile information in your other CMS accounts, such as your Medicare, National Plan & Provider Enumeration System (NPPEs) or Identity Management (IDM) accounts.

**Basic Information**

First Name \* Dan      Last Name \* Mertz

Middle Name      Suffix (Jr., Sr., etc.)

**Figure 21b: Enter Personal Information Page (BOTTOM PART) (OPS2.0)**



## Business Information

<b>Job title *</b>	<input type="text" value="Administrator"/>	<b>Email Address *</b>	<input type="text" value="dm@hgjklh.com"/>
<b>Country *</b>	<input type="text" value="United States"/>		
<b>Business Address, Line 1 *</b>	<input type="text" value="6610 Cypress Lake Drive"/>		
<b>Business Address, Line 2</b>	<input type="text" value="Business Address, Line 2"/>		
<b>City *</b>	<input type="text" value="Houston"/>	<b>State *</b>	<input type="text" value="Texas"/>
<b>Zip Code *</b>	<input type="text" value="78244"/>	<b>Zip Extension</b>	<input type="text" value="XXXX"/>
		<b>Business Telephone Number *</b>	<input type="text" value="458-426-5842"/>

Back

Cancel




Continue

**Step 11:** Review the information entered for your reporting entity and personal profile. Select the **Back** button at the bottom of the page to go back and edit any information. Once you have reviewed the information and determined it to be correct, select the **Continue** button.

**Figure 22a: Review and Submit Profile Page (TOP PART) (OPS1.0)**

### Create Profile

- ✓ Select Profile Type
- ✓ Register Entity
- ✓ Personal Information
- ④ Review and Submit Profile**

-  **Access** the Open Payments User Guide [PDF]
-  Need help with the website? **Contact Us** by email
-  **Review** the Open Payments Privacy Policy [PDF]

## Review and Submit Profile

Review the information on this page to ensure it is correct. Select the "Back" button to navigate to the previous pages to correct any invalid information. Select the "Continue" button to submit your profile.

**Entity's Legal Name:** Dan's Medical Supply

**Reporting Entity Type:** Applicable Manufacturer

**Business Type:** Applicable manufacturer-devices/medical supplies

**Food & Drug Administration (FDA) Establishment Identifier:**

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

**URL of Parent Company:** www.cms.gov

---

**Business Address:**

**Country:** United States

**Business Address, Line 1:** 123 chicken st

**Business Address, Line 2:**

**City Name:** Haymarket

**State:** Virginia

**Zip Code:** 20169

**Business Telephone Number:** 210-602-4955

**Figure 22b: Review and Submit Profile Page (MIDDLE PART) (OPS1.0)**

### Business Ownership Information

Type of Ownership: Sole Proprietorship

Taxpayer Identifier Number (TIN)/Employer Identification Number (EIN): 35-9820148

Doing Business As (DBA) Name: Dan's Medical Supply

### Will this entity's information be submitted in a consolidated report (i.e., one entity reports on behalf of another entity)?

I don't know whether my entity's data will be submitted in a consolidated report

### Points of Contact

The two identified points of contact will receive important notification emails regarding Open Payments.

Being entered as a point of contact does not register that individual in the Open Payments system or give that individual access to the system. Individuals must be registered in the system if they want to access the Open Payments system.

#### Primary Point of Contact

Name: John Smith

Business Telephone Number: 526-845-5214

Title at the Entity: Admin

Business Email Address: js@hghj.com

#### Backup Point of Contact

Name: Joe Smith

Business Telephone Number: 521-574-5214

Title at the Entity: Admin

Business Email Address: js@yjgyjk.com

Figure 22c: Review and Submit Profile Page (BOTTOM PART) (OPS1.0)

**Contact Information for Review and Dispute**

The contents of the "Review and Dispute Primary Point of Contact" and "Review and Dispute Backup Point of Contact" fields will be visible to the covered recipients associated with the records during the review process. The contents will be displayed exactly as entered in these fields.

**Review and Dispute Primary Point of Contact**

**Name:** Mary Jones      **Title at the Entity:** Admin

**Business Telephone Number:** 248-842-6035      **Business Telephone Extension:**

**Business Email Address:** mj@jkhghjkghjkl.com

**Review and Dispute Backup Point of Contact**

**Name:**      **Title at the Entity:**

**Business Telephone Number:**      **Business Telephone Extension:**

**Business Email Address:**

---

**Nominations:**

<b>Role:</b>	<b>First Name:</b>	<b>Last Name:</b>	<b>Middle Name:</b>	<b>Suffix (Jr., Sr., etc.):</b>	<b>Business Email Address:</b>
Officer, Submitter, Attester	Daniel	Mertz			dm@ghlhjkg.com

[Cancel](#)      [Back](#)      [Continue](#)

Figure 23a: Review and Submit Profile Page (TOP PART) (OPS2.0)

**OPEN PAYMENTS™**      Home    About Us    Resources    Contact Us

## Create Profile

**1 Select Profile Type** ✓

**2 Register Entity** ✓

Registration Information ✓

Entity Information ✓

Business Information ✓

Points Of Contact ✓

Contact Information ✓

Your Roles ✓

Nominate Additional Roles ✓

**3 Personal Information** ✓

**4 Review and Submit Profile**

### Review and Submit Profile

Review the information on this page to ensure it is correct. Select the "Back" button to navigate to the previous pages to correct any invalid information. Select the "Submit" button to submit the profile.

**Entity Information**

**Entity's Legal Name:** Dan's Medical Supply  
**Reporting Entity Type:** Applicable Manufacturer  
**Business Type:** Applicable manufacturer-devices/medical supplies  
**Food & Drug Administration (FDA) Establishment Number:**  
**Data Universal Number System (D-U-N-S Number):**  
**URL of Parent Company:** www.cms.gov

**Business Address**

**Country:** United States  
**Business Address, Line 1:** 428 Hayne St  
**Business Address, Line 2:**  
**City Name:** Walkin  
**State:** Arizona  
**Zip Code:** 85001  
**Business Telephone Number:** 210-278-9999

Figure 23b: Review and Submit Profile Page (MIDDLE PART) (OPS2.0)

**Business Ownership Information**

**Type of Ownership:** Sole Partnership  
**Taxpayer Identification Number (TIN)/Employer Identification Number (EIN):** 52-7862148  
**Doing Business As (DBA) Name:** Mike's Medical Supply

---

**Will this entity's information be submitted in a consolidated report (i.e. one entity reports on behalf of another entity)?**

I don't know whether my entity's data will be submitted in a consolidated report

---

**Points of Contact**

The two identified points of contact will receive important notification emails regarding Open Payments.

Being entered as a point of contact does not register that individual in the Open Payments System or give that individual access to the system. Individuals must be registered in the system if they want to access the Open Payments System.

<p><b>Primary Point of Contact</b>  <b>Name:</b> Sam Smith  <b>Title at the Entity:</b> Admin  <b>Business Telephone Number:</b> 254-856-2025  <b>Business Email Address:</b> ss@hdsjkdghgdj.com</p>	<p><b>Backup Point of Contact</b>  <b>Name:</b> Jane Stevens  <b>Title at the Entity:</b> Admin  <b>Business Telephone Number:</b> 452-147-5036  <b>Business Email Address:</b> js@jedhgjk.com</p>
--	--

**Figure 23c: Review and Submit Profile Page (BOTTOM PART) (OPS2.0)**

**Contact Information for Review and Dispute**

The content of the Contact Information for Review and Dispute fields will be visible to the covered recipients associated with the records during the review process. The content will be displayed exactly as entered in this field.

<p><b>Review and Dispute Primary Point of Contact</b>  <b>Name:</b> Doug Mitchell  <b>Title at the Entity:</b> Admin  <b>Business Telephone Number:</b> 351-478-5213  <b>Business Email Address:</b> dm@dkjghjkr.com</p>	<p><b>Review and Dispute Backup Point of Contact</b>  <b>Name:</b>  <b>Title at the Entity:</b>  <b>Business Telephone Number:</b>  <b>Business Email Address:</b></p>
--	--

---

**Nominations**

Role:	First Name:	Last Name:	Business Email Address:
Officer, Attester, Submitter	Dan	Mertz	dm@hgjklh.com




Back
Cancel
Submit

The following message will appear on-screen to confirm your reporting entity and personal profile have been successfully created.

**Figure 24: Success Confirmed Page (OPS1.0)**

### Create Profile

- ✓ Select Profile Type
- ✓ Register Entity
- ✓ Personal Information
- ✓ Review and Submit Profile

-  Access the Open Payments User Guide [PDF]
-  Need help with the website? **Contact Us** by email
-  Review the Open Payments Privacy Policy [PDF]

## Success Confirmed

You have successfully submitted profile information for Dan's Medical Supply.

You may now go to [Open Payments Home](#)

You will receive an email confirming that a profile was submitted for the entity. The email confirmation message will have the entity's registration ID.


The entity will undergo vetting. You will receive an email with the results of the vetting soon. The entity will be successfully registered in the Open Payments system if it passes vetting. You can refer to the [Open Payments User Guide \[PDF\]](#) for further information.

For help obtaining a PDF viewer, go to the [CMS.gov Help page](#).

Note: You will not be able to take any actions related to this profile until the entity has been successfully registered.

**Figure 25: Success Confirmed Page (OPS2.0)**

## Registration Complete ×


 **Success**  
You have successfully submitted profile information for Dan's Medical Supply.

You may now go to [Open Payments Home](#).

You will receive an email confirming that a profile was submitted for the entity. The email confirmation message will have the entity's registration ID.

The entity will undergo vetting. You will receive an email with the results of the vetting soon. The entity will be successfully registered in the Open Payments system if it passes vetting. You can refer to the [Open Payments User Guide \[PDF\]](#) for further information.

For help obtaining a PDF viewer, go to the [CMS.gov Help page](#).

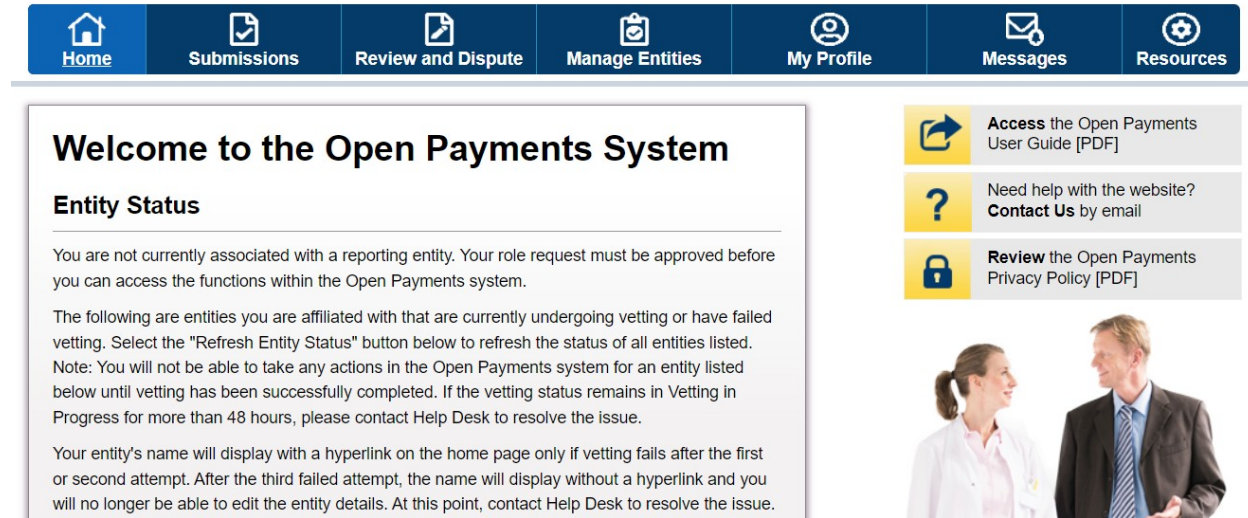
 **Note:**  
You will not be able to take any actions related to this profile until the entity has been successfully vetted.

[Continue to Open Payments Home Page](#)

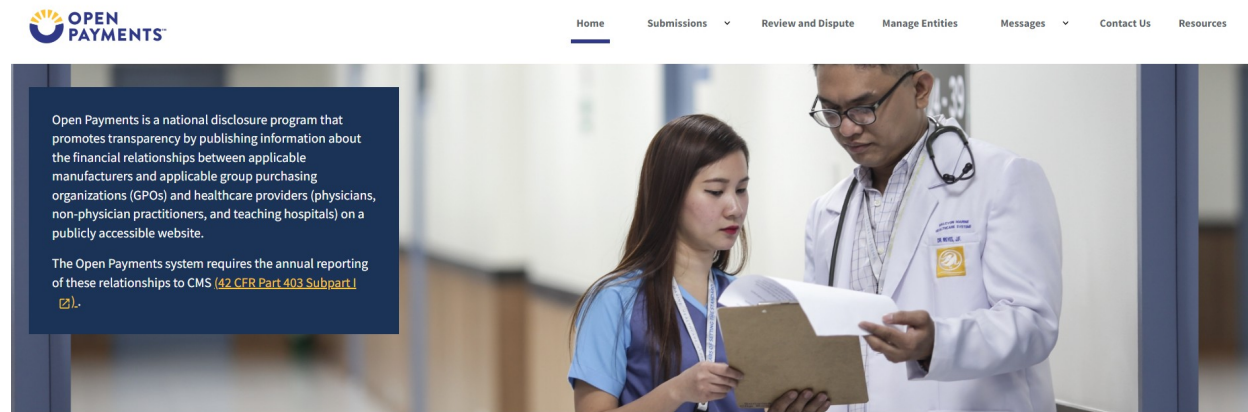
## Registering an Entity as a Returning System User

**Step 1:** Select the **Manage Entities** tab from the header menu on the Open Payments home page.

**Figure 26: Open Payments System Landing Page for returning system users (OPS1.0)**



**Figure 27: Open Payments System Landing Page for returning system users (OPS2.0)**



Welcome to the Open Payments System

Step 2: Select Register New Entity.

Figure 28: Manage Entities Page (OPS1.0)

The screenshot shows the 'Manage Entities' page. At the top is a navigation bar with icons for Home, Submissions, Review and Dispute, Manage Entities (highlighted), My Profile, Messages, and Resources. The main content area has a heading 'Manage Entities' and a yellow 'Register New Entity' button. Below the heading is explanatory text about entity management and a 'Your Entities' section. The sidebar on the right contains three links: 'Access the Open Payments User Guide [PDF]', 'Need help with the website? Contact Us by email', and 'Review the Open Payments Privacy Policy [PDF]'. At the bottom right is a photo of a man and a woman in professional attire.

**Manage Entities**

[Register New Entity](#)

The entities you are associated with are listed below. Select an entity from the list below to view the entity's profile and, if you hold the officer role, manage user roles affiliated with the entity.

Entities pending recertification must be recertified before users can perform any system actions for those entities. Entity recertification requires that an active officer within the Open Payments system reviews, updates (as necessary), and confirms the accuracy of the entity's profile information.

Changes made to the Entity Name, TIN, or DUNS Number fields will cause your entity to be re-vetted.

**Your Entities**

Name:	Registration ID:	Status:	Date Verified:
<a href="#">Dan's Medical Supply</a>	100001436985	Conditionally Active	07/02/2024 05:46:57

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

[Need help with the website? Contact Us by email](#)

[Review the Open Payments Privacy Policy \[PDF\]](#)

Figure 29: Manage Entities Page (OPS2.0)

The screenshot shows the 'Manage Entities' page in a different version. It features the 'OPEN PAYMENTS' logo and a navigation bar with links for Home, Submissions, Review and Dispute, Manage Entities (highlighted), Messages, Contact Us, and Resources. The main content area has a heading 'Manage Entities' and explanatory text. Below the text is a table listing entities with columns for Name, Registration ID, Status, Date Verified, and Actions. A 'Register New Entity' button is located at the bottom right.

**Manage Entities**

The entities you are associated with are listed below. Select an entity from the list below to view the entity's profile and affiliated users. If you hold the officer role, you are able to update the entity's information and manage user roles.

Entities pending recertification must be recertified before users can perform any system actions for those entities. Entity recertification requires that an active officer within the Open Payments system reviews, updates (as necessary), and confirms the accuracy of the entity's profile information.

Changes made to the Entity Name, TIN, or DUNS Number fields will cause your entity to be re-vetted.

Name	Registration ID	Status	Date Verified	Actions
<a href="#">Dan's Medical Supply</a>	100001417221	Vetted		<a href="#">Manage Entity</a>

[Register New Entity](#)

Step 3: The remaining steps are the same as registering a profile for the first entity.

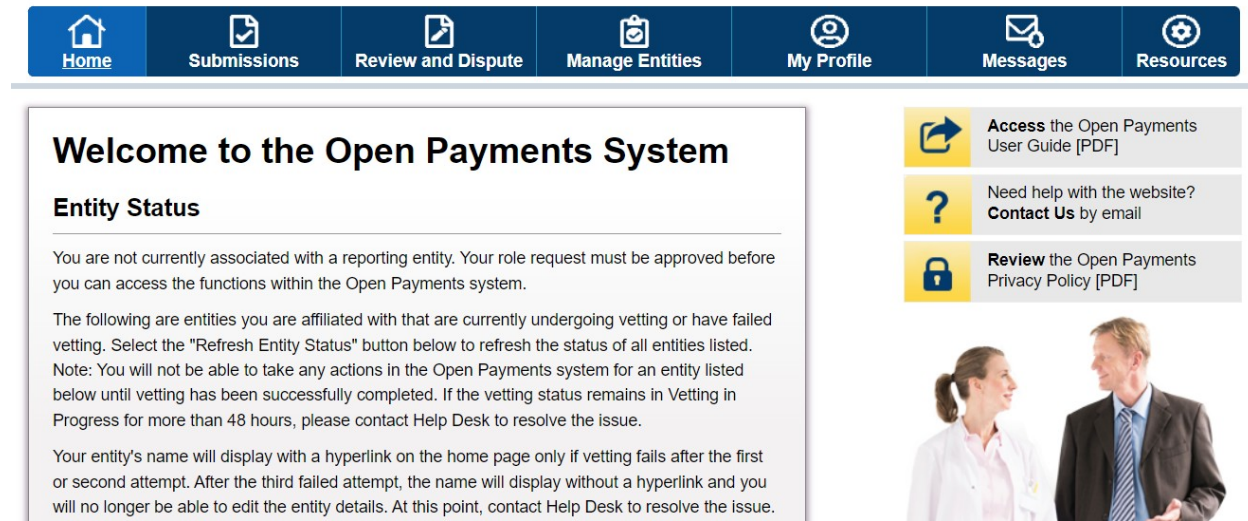
Please refer to Figure 7, and onwards.



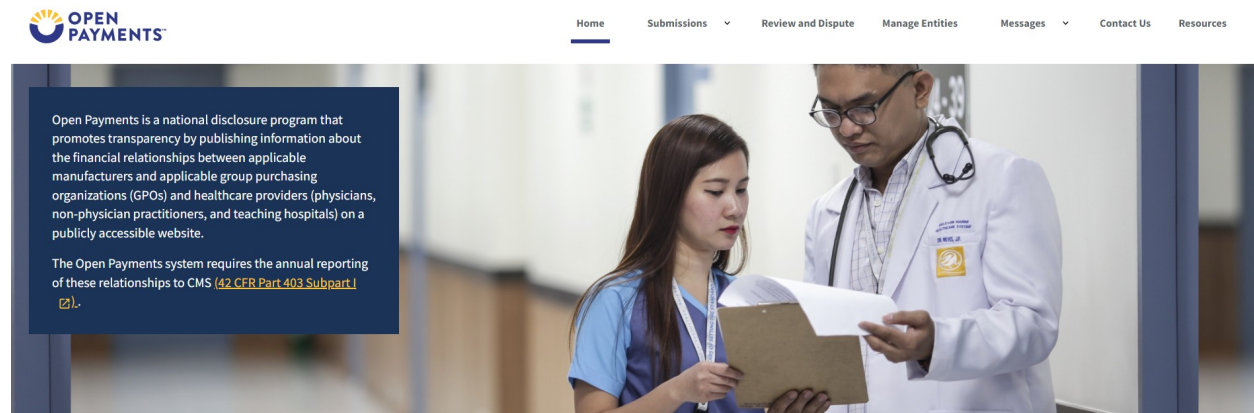
## Nominating Individuals for a Role with an Existing Reporting Entity

Step 1: Select the **Manage Entities** tab from the header menu on the Open Payments home page.

**Figure 29: Open Payments System Landing Page for returning system users (OPS1.0)**



**Figure 30: Open Payments System Landing Page for returning system users (OPS2.0)**



**Step 2:** On the “Manage Entities” page, indicate the reporting entity for which you will nominate an individual for a user role by selecting the reporting entity’s hyperlinked name.

**Figure 31: Manage Entities Page (OPS1.0)**

The screenshot shows the 'Manage Entities' page in OPS1.0. At the top is a dark blue navigation bar with icons and labels for Home, Submissions, Review and Dispute, Manage Entities (highlighted), My Profile, Messages, and Resources. The main content area has a heading 'Manage Entities' and a yellow 'Register New Entity' button. Below the heading is explanatory text about entity management and a table titled 'Your Entities'. The table lists one entity: 'Dan's Medical Supply' with a registration ID of 100001436985, a status of 'Conditionally Active', and a date verified of 07/02/2024 05:46:57. To the right of the main content is a sidebar with three utility links: 'Access the Open Payments User Guide [PDF]', 'Need help with the website? Contact Us by email', and 'Review the Open Payments Privacy Policy [PDF]'. Below the sidebar is a photograph of a man and a woman in professional attire.

**Figure 32: Manage Entities Page (OPS2.0)**

The screenshot shows the 'Manage Entities' page in OPS2.0. At the top left is the 'OPEN PAYMENTS' logo. The navigation bar includes Home, Submissions, Review and Dispute, Manage Entities (highlighted), Messages, Contact Us, and Resources. The main content area has a heading 'Manage Entities' and explanatory text about entity management. Below the text is a table titled 'Your Entities' with columns for Name, Registration ID, Status, Date Verified, and Actions. The table lists one entity: 'Dan's Medical Supply' with a registration ID of 100001417221, a status of 'Vetted', and a 'Manage Entity' button. At the bottom right of the page is a blue 'Register New Entity' button.

Name	Registration ID	Status	Date Verified	Actions
<a href="#">Dan's Medical Supply</a>	100001417221	Vetted		<a href="#">Manage Entity</a>

Step 3: Select the Manage Roles link

Figure 33: Manage Entities Page (OPS1.0)

The screenshot shows the 'Manage Entities' page for 'Dan's Medical Supply'. At the top is a navigation bar with icons for Home, Submissions, Review and Dispute, Manage Entities (highlighted), My Profile, Messages, and Resources. Below the navigation bar, the page title 'Dan's Medical Supply' is displayed. To the right of the title are three utility links: 'Access the Open Payments User Guide [PDF]', 'Need help with the website? Contact Us by email', and 'Review the Open Payments Privacy Policy [PDF]'. Below the title are three tabs: 'Entity Details', 'Manage Roles' (highlighted), and 'Indicate No Payments/Transfers of Value to Report'. The main content area contains a text block explaining that only an authorized official can update the entity profile, followed by an 'Update Entity' button. Below this is the 'Entity Information' section with the following details:

- Entity's Registration ID: 100001436985
- Entity's Legal Name: Dan's Medical Supply
- Reporting Entity Type: Applicable Manufacturer
- Business Type: Applicable manufacturer-devices/medical supplies
- Food & Drug Administration (FDA) Establishment Identifier:
- Data Universal Numbering System (D-U-N-S® Number):
- URL of Parent Company: www.cms.gov

To the right of the main content area is a photograph of a woman in a white lab coat and a man in a suit talking.

Figure 34: Manage Entities Page (OPS2.0)

The screenshot shows the 'Manage Entities' page for 'Dan's Medical Supply' in the OPS2.0 version. At the top left is the 'OPEN PAYMENTS' logo. The navigation bar includes Home, Submissions, Review and Dispute, Manage Entities (highlighted), Messages, Contact Us, and Resources. The page title is 'Manage Entities'. On the left is a sidebar with three tabs: 'Entity Details' (highlighted), 'Manage Roles', and 'Indicate No Payments/Transfers of Value to Report'. The main content area is titled 'Dan's Medical Supply : Entity Details'. It contains a text block explaining that only an authorized official can update the entity profile, followed by an 'Update Entity' button. Below this is the 'Entity Information' section with the following details:

- Entity's Registration ID: 100001417221
- Entity's Legal Name: Dan's Medical Supply
- Reporting Entity Type: Applicable Manufacturer
- Business Type: Applicable manufacturer-devices/medical supplies
- Food & Drug Administration (FDA) Establishment Identifier:
- Data Universal Numbering System (D-U-N-S® Number):
- URL of Parent Company: www.cms.gov

Step 4: Select Nominate an Additional Role.

Figure 35: Entities Manage Roles Tab (OPS1.0)

**Entity Details** | **Manage Roles** | Indicate No Payments/Transfers of Value to Report

Select the "Nominate New Role" button to nominate a new individual to fill a role within your entity. Select the "Modify" button by a user's name to add or remove a role for an already affiliated user. Select the "Deactivate User" button by a user's name to remove that user completely from your entity.

Note: An officer may modify or deactivate another officer but cannot deactivate themselves from the entity.

An explanation of the statuses below can be found in the [Open Payments User Guide \[PDF\]](#).

**Nominate New Role**

Name:	Role:	Status:	Actions:
Daniel Mertz	Officer	Conditionally Active	<b>Modify</b>
	Submitter	Requested	<b>Approve</b>
	Attester	Requested	<b>Approve</b>

[Access the Open Payments User Guide \[PDF\]](#)  
[Need help with the website? Contact Us by email](#)  
[Review the Open Payments Privacy Policy \[PDF\]](#)

Figure 36: Entities Manage Roles Tab (OPS2.0)

**Entity Details** | **Manage Roles** | Indicate No Payments/Transfers of Value to Report

**Dan's Medical Supply : Manage Roles**

Select the "Nominate an Additional Role" button to nominate a new individual to fill a role within your entity.

Select the "Modify" button by a user's name to add or remove a role for an already affiliated user.

Select the "Deactivate User" button by a user's name to remove that user completely from your entity.

An explanation of the statuses below can be found in the [Open Payments User Guide \[PDF\]](#).

**Note:**  
An officer may modify or deactivate another officer but cannot deactivate themselves from the entity.

**Nominate an Additional Role**

**The user roles are as follows:**

Name	Role	Status	Action
Dan Mertz	Officer	Approved	<b>Modify</b>
Dan Mertz	Submitter	Approved	
Dan Mertz	Attester	Approved	

Step 5: Enter the required nominee information. Once you are done, select **Send Nomination**.

**Figure 37a: Nominate New Role Page (TOP PART) (OPS1.0)**

The screenshot shows the top portion of the 'Nominate New Role' page. At the top is a navigation bar with icons for Home, Submissions, Review and Dispute, Manage Entities (highlighted), My Profile, Messages, and Resources. Below the navigation bar, the entity name 'Dan's Medical Supply' is displayed. Three tabs are visible: 'Entity Details' (highlighted), 'Manage Roles', and 'Indicate No Payments/Transfers of Value to Report'. On the right side, there are three utility links: 'Access the Open Payments User Guide [PDF]', 'Need help with the website? Contact Us by email', and 'Review the Open Payments Privacy Policy [PDF]'. Below these links is a photograph of a woman in a white lab coat and a man in a suit talking. The main form area is titled 'Nominate New Role' and includes a note: 'A field with an asterisk (\*) is required. Nominate someone who will have a role on Open Payments for your entity.' The form contains the following fields: '\*First Name:' (Bill), '\*Middle Name:' (empty), '\*Last Name:' (Zahm), '\*Suffix (Jr., Sr., etc.):' (empty), '\*Business Email Address:' (bz@hjfjnk.com), and '\*Indicate the role or roles this person will have:' with radio buttons for Officer, Submitter (checked), Attester, and Compliance.

**Figure 37b: Nominate New Role Page (BOTTOM PART) (OPS1.0)**

The screenshot shows the bottom portion of the 'Nominate New Role' page. It contains the following fields: '\*Country:' (United States), '\*Business Address, Line 1:' (234 Road), 'Business Address, Line 2:' (empty), '\*City Name:' (San Antonio), '\*State:' (Texas), '\*Zip Code:' (99999 9999, 78244), and '\*Business Telephone Number:' (999-999-9999, 514-856-3014). At the bottom left is a 'Cancel' button, and at the bottom right is a yellow 'Send Nomination' button.

**Figure 38a: Nominate New Role Page (TOP PART) (OPS2.0)**

Entity Details  
Manage Roles  
**Nominate an Additional Role**  
Indicate No Payments/Transfers of Value to Report

Home Submissions Review and Dispute Manage Entities Messages Contact Us Resources

### Dan's Medical Supply: Nominate or Modify a Role Page

A field with an asterisk (\*) is required.  
Nominate someone who will have a role on Open Payments for your entity.

#### User Information

First Name \* Middle Name Last Name \* Suffix (Jr., Sr., etc.)

Bill Middle Name Zahm

**\* Indicate the role or roles this person will have**

- Officer
- Submitter
- Attester
- Compliance

**Figure 38b: Nominate New Role Page (BOTTOM PART) (OPS2.0)**

#### Business Contact Information

Country \*  
United States

Business Address, Line 1 \* Business Address, Line 2  
654 Road Business Address, Line 2

City \* State \* Zip Code \* Zip Extension  
San Antonio Texas 78244 XXXX

Email Address \* Business Telephone Number \*  
bz@ghjkh.com 214-895-3047

Cancel Send Nomination

The on-screen message below will appear once you have completed the nomination. Note the addition of the nominee in the list.

**Figure 39: Entities Manage Roles Tab confirming success of nomination (OPS1.0)**

## Dan's Medical Supply

- Entity Details
- Manage Roles**
- Indicate No Payments/Transfers of Value to Report

**Confirmation:**

- You have successfully submitted Role Information.

Select the "Nominate New Role" button to nominate a new individual to fill a role within your entity. Select the "Modify" button by a user's name to add or remove a role for an already affiliated user. Select the "Deactivate User" button by a user's name to remove that user completely from your entity.

Note: An officer may modify or deactivate another officer but cannot deactivate themselves from the entity.

An explanation of the statuses below can be found in the [Open Payments User Guide \[PDF\]](#).

[Nominate New Role](#)

Name:	Role:	Status:	Actions:
Daniel Mertz	Officer	Conditionally Active	<a href="#">Modify</a>
	Submitter	Requested	<a href="#">Approve</a>
	Attester	Requested	<a href="#">Approve</a>
Bill Zahm	Submitter	Nomination Approved	<a href="#">Modify</a>

- [Access the Open Payments User Guide \[PDF\]](#)
- [Need help with the website? Contact Us by email](#)
- [Review the Open Payments Privacy Policy \[PDF\]](#)



**Figure 40: Entities Manage Roles Tab confirming success of nomination (OPS2.0)**

## Manage Entities

- Entity Details
- Manage Roles**
- Indicate No Payments/Transfers of Value to Report

You have successfully submitted Role information.

**Dan's Medical Supply : Manage Roles**

Select the "Nominate an Additional Role" button to nominate a new individual to fill a role within your entity. Select the "Modify" button by a user's name to add or remove a role for an already affiliated user. Select the "Deactivate User" button by a user's name to remove that user completely from your entity.

An explanation of the statuses below can be found in the [Open Payments User Guide \[PDF\]](#).

**Note:** An officer may modify or deactivate another officer but cannot deactivate themselves from the entity.

[Nominate an Additional Role](#)

**The user roles are as follows:**

Name	Role	Status	Action
Bill Zahm	Submitter	<span style="color: green;">●</span> Nomination Approved	<a href="#">Modify</a>
Dan Mertz	Officer	<span style="color: green;">●</span> Approved	<a href="#">Modify</a>
Dan Mertz	Submitter	<span style="color: green;">●</span> Approved	
Dan Mertz	Attester	<span style="color: green;">●</span> Approved	

## Accepting a Nomination (First Time System Users)

Step 1: Select **Create Profile**.

**Figure 42: Open Payments System Landing Page for first-time system users (OPS1.0)**

The screenshot shows the landing page for the Open Payments System. At the top, there is a large header "Open Payments (Sunshine Act)". Below this, on the left, is a "Welcome to the Open Payments System" section with a red warning message: "Our records indicate that you have not yet registered in the Open Payments system. Before you can perform any actions in the system, you must first create your profile and complete the registration process." To the right of this message is a blue button labeled "Create My Profile". On the far right, there are three utility links: "Access the Open Payments User Guide", "Need help with the website? Contact Us by email", and "Review the Open Payments Privacy Policy [PDF]". Below the welcome section is a "Getting Started" section with a paragraph explaining the program's purpose. To the right of this text is a photograph of a female doctor and a male doctor in white coats talking. Below the "Getting Started" section is a "Registering in the Open Payments System" section.

**Figure 43: Open Payments System Landing Page for first-time system users (OPS2.0)**

The screenshot shows the updated landing page for the Open Payments System. At the top left is the "OPEN PAYMENTS" logo. At the top right is a navigation menu with links for "Home", "About Us", "Resources", and "Contact Us". Below the navigation is a large banner image of a female doctor and a male doctor in white coats looking at a clipboard. On the left side of the banner is a blue text box with the following text: "Open Payments is a national disclosure program that promotes transparency by publishing information about the financial relationships between applicable manufacturers and applicable group purchasing organizations (GPOs) and healthcare providers (physicians, non-physician practitioners, and teaching hospitals) on a publicly accessible website. The Open Payments system requires the annual reporting of these relationships to CMS (42 CFR Part 403 Subpart I [a])." Below the banner is a yellow warning box with a triangle icon and the text: "Create Profile Our records indicate that you have not yet created a profile in the Open Payments system. Before you can perform any actions in the system, you must first create your profile and complete the registration process." To the right of this warning box is a blue "Create Profile" button. Below the warning box is a section titled "Your Current Registration Process" which features a progress bar with three steps: "Register through IDH" (completed), "Request access to Open Payments" (completed), and "Create profile" (in progress).



Step 2: Select **Start Profile** at the bottom of the page.

**Figure 44: Create Profile Page (OPS1.0)**

## Create Profile

To begin creating a profile and registering in the Open Payments system, you must identify your affiliation with an applicable manufacturer, applicable group purchasing organization (GPO), teaching hospital, physician, or non-physician practitioner. Users with provider type of Physician Assistant, Nurse Practitioner, Clinical Nurse Specialist, Certified Registered Nurse Anesthetist, Certified Nurse-Midwife, or Anesthesiologist Assistant are called Non-Physician Practitioner in the Open Payments system.

If the applicable manufacturer, applicable GPO, teaching hospital, physician, or non-physician practitioner has not registered in the Open Payments system, you may register them and then yourself.

For reporting entities, prior to beginning registration, collect the information required for reporting entity registration, then proceed with the registration process.

For reporting teaching hospital, physician, or non-physician practitioner registration, prior to beginning registration, collect the information required for covered recipient registration, then proceed with the registration process.

If the applicable manufacturer, applicable GPO, teaching hospital, physician, or non-physician practitioner has already been registered in the Open Payments system and you have not affiliated with them in the Open Payments system, you may:

- Ask a user already affiliated with the reporting entity or covered recipient to nominate you for a user role; or
- Create a personal profile and request a role with the reporting entity or covered recipient user. Note that users who wish to associate themselves with physicians or non-physician practitioner must be nominated by the physician or non-physician practitioner.

**Figure 45: Create Profile Page (OPS2.0)**

## Creating a Profile

To begin creating a profile and registering in the Open Payments system, you must identify your affiliation with an applicable manufacturer, applicable group purchasing organization (GPO), teaching hospital, physician, or non-physician practitioner. Users with provider type of Physician Assistant, Nurse Practitioner, Clinical Nurse Specialist, Certified Registered Nurse Anesthetist, Certified Nurse-Midwife, or Anesthesiologist Assistant are called Non-Physician Practitioners in the Open Payments system.

For reporting entities, prior to beginning registration, collect the information required for reporting entity registration, then proceed with the registration process.

For reporting teaching hospital, physician, or non-physician practitioner registration, prior to beginning registration, collect the information required for covered recipient registration, then proceed with the registration process.

If the applicable manufacturer, applicable GPO, teaching hospital, physician, or non-physician practitioner has already been registered in the Open Payment system and you have not affiliated with them in the Open Payments system, you may:

- Ask a user already affiliated with the reporting entity or covered recipient to nominate you for a user role; or
- Create a personal profile and request a role with the reporting entity or covered recipient user. Note that users who wish to associate themselves with physicians or non-physician practitioners must be nominated by the physician or non-physician practitioner.

## Required Information

Fields for required information are marked with an asterisk \*.

It is important that you have all required information available when you begin because registration must be completed in one session. **A registration session will time out after 30 minutes of inactivity. If that occurs, all information entered during that session will be lost.**

A list of required information is available in the "[Required Information for Registration](#)" quick reference guide [PDF]. This QRG is also available on the [Resources page of the Open Payments website](#).

## Registering as a Covered Recipient

### Registering as a Physician or a Teaching Hospital

If you are a physician who works at a teaching hospital and wish to see data related to you in your capacity as a physician, select the "Physician or Non-Physician Practitioner" option when registering. Registering as a user affiliated with a teaching hospital will allow you to see only data related to that teaching hospital and not your records. You may register as both a physician and a user affiliated with a teaching hospital if needed.

Physicians should register themselves in the Open Payments system and not delegate this task to another individual.

### Registering as a Non-Physician Practitioner

If you are registering as a Physician Assistant, Nurse Practitioner, Clinical Nurse Specialist, Certified Registered Nurse Anesthetist, Certified Nurse-Midwife, or Anesthesiologist Assistant, select the "Physician or Non-Physician Practitioner" option when registering. If you are a Physician Assistant, Nurse Practitioner, Clinical Nurse Specialist, Certified Registered Nurse Anesthetist, Certified Nurse-Midwife, or Anesthesiologist Assistant who works at a teaching hospital and wish to see data related to you in your capacity as a non-physician practitioner, select the "Physician or Non-Physician Practitioner" option when registering.

When you are ready to begin registration, select "Start Profile."

[Back](#)

[Start profile](#)

Step 3: Select the **I have a Nomination ID and/or a Registration ID** link on the “Select Profile Type” page.

**Figure 46: Select Profile Type Page (OPS1.0)**

**Create Profile**

- Select Profile Type**
- Register Entity
- Personal Information
- Review and Submit Profile

**Access** the Open Payments User Guide

**?** Need help with the website? **Contact Us** by email

**Review** the Open Payments Privacy Policy [PDF]

## Select Profile Type

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

If you received a nomination ID and/or registration ID in an email notifying you of your nomination for a user role, begin creating your profile by selecting the “I have a Nomination ID and/or a Registration ID” link.

If you did not receive a nomination ID and/or a registration ID in an email, begin creating your profile by indicating whether you are a reporting entity or covered recipient.

**Note:** If you are a physician who works at a teaching hospital and wish to see data related to you in your capacity as a physician, select the “Physician or Non-Physician Practitioner” option when registering. Registering as a user affiliated with a teaching hospital will allow you to see only data related to that teaching hospital and not your records. You may register as both a physician and a user affiliated with a teaching hospital if needed.

If you have any questions regarding the user type you should register as, please contact the Open Payments Help Desk [openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov) for guidance.

**\* Required: Select the type of entity or covered recipient you are affiliated with OR the “I have a Nomination ID and/or a Registration ID” link.**

**?**

- Applicable manufacturer or applicable group purchasing organization (GPO)
- Physician or Non-Physician Practitioner
- Teaching hospital

----- OR -----

[I have a Nomination ID and/or a Registration ID](#)

**Cancel** **Continue**

**Figure 47: Select Profile Type Page (OPS2.0)**

**OPEN PAYMENTS**

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## Create Profile

- Select Profile Type**
- Register Entity
- Personal Information
- Review and Submit Profile

### Select a Profile Type

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

If you received a nomination ID and/or registration ID in an email notifying you of your nomination for a user role, begin creating your profile by selecting the “I have a Nomination ID and/or a Registration ID” link.

If you did not receive a nomination ID and/or a registration ID in an email, begin creating your profile by indicating whether you are a reporting entity or covered recipient.

**Note:** If you are a physician who works at a teaching hospital and wish to see data related to you in your capacity as a physician, select the “Physician or Non-Physician Practitioner” option when registering. Registering as a user affiliated with a teaching hospital will allow you to see only data related to that teaching hospital and not your records. You may register as both a physician and a user affiliated with a teaching hospital if needed.

If you have any questions regarding the user type you should register as, please contact the Open Payments Help Desk [openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov) for guidance.

**Required: Select the type of entity or covered recipient you are affiliated with OR the “I have a Nomination ID and/or a Registration ID” \***

- I have a Nomination ID and/or a Registration ID
- Applicable Manufacturer or applicable Group Purchasing Organization (GPO)
- Physician or Non-Physician Practitioner
- Teaching hospital

**Cancel** **Continue**

**Step 4:** Select the User Type “Applicable Manufacturer or Applicable GPO.” Enter the registration ID and nomination ID that you received in the nomination notification email and then select **Show Nomination**.

**Figure 48: Search for Nomination Page (OPS1.0)**

**Create Profile**

- Select Profile Type
- Register Entity
- Search Nomination**
- Entity Information
- Confirm Nomination
- Personal Information
- Review and Submit Profile

**Search for Nomination**

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

From the dropdown list below, select your User Type.

Enter your Nomination ID and Registration ID included in the nomination email you have received. Note: nominees for Physician or Non-Physician practitioner authorized representatives receive only Nomination ID numbers.

Select the "Show Nomination" button to see the information associated with your nomination.

**\*User Type**  
Applicable Manufacturer or Applicable GPO

**\*Registration ID:**  
The ID is a 12-digit number  
100001436985

**\*Nomination ID:**  
The ID is a 12-digit number  
511278198332

Show Nomination

Cancel

**Figure 49: Search for Nomination Page (OPS2.0)**

**OPEN PAYMENTS**

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**Create Profile**

- Select Profile Type
- Entity Nomination
- Search Nomination**
- Confirm Entity
- Confirm Nomination
- Personal Information
- Review and Submit Profile

**Search for Nomination**

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

From the dropdown list below, select your User Type.

**ⓘ** Nominees for Physician or Non-Physician Practitioner authorized representatives receive only Nomination ID numbers.

Enter your Nomination ID and Registration ID included in the nomination email you have received.  
Select the "Show Nomination" button to see the information associated with your nomination.

**User Type \***  
Applicable Manufacturer or Applicable Group Purchasing Organization

**Registration ID \***  
The ID is a 12-digit number.  
100001417221

**Nomination ID \***  
The ID is a 12-digit number.  
955809942552

Show Nomination

Cancel

Step 5: Review the nomination information displayed. If the information is correct, select the **Continue** button.

**Figure 50: Search for Nomination page (OPS1.0)**

**Create Profile**

- Select Profile Type
- Register Entity
- Search Nomination**
- Entity Information
- Confirm Nomination
- Personal Information
- Review and Submit Profile

**Search for Nomination**

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

From the dropdown list below, select your User Type.

Enter your Nomination ID and Registration ID included in the nomination email you have received. Note: nominees for Physician or Non-Physician practitioner authorized representatives receive only Nomination ID numbers.

Select the "Show Nomination" button to see the information associated with your nomination.

**\*User Type**  
Applicable Manufacturer or Applicable GPO

**\*Registration ID:**  
The ID is a 12-digit number  
100001436985

**\*Nomination ID:**  
The ID is a 12-digit number  
511278198332

**Show Nomination**

**Nomination Search Results**

Review and confirm the entity identified below is correct. Select the "Continue" button if this is the correct entity.

**Bill Zahm was nominated as Submitter**

**Entity Information:** Applicable manufacturer-devices/medical supplies

**Entity's Legal Name:** Dan's Medical Supply

**Cancel** **Continue**

**Figure 51a: Search for Nomination page (TOP PART) (OPS2.0)**

**OPEN PAYMENTS**

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**Create Profile**

- Select Profile Type
- Entity Nomination
- Search Nomination**
- Confirm Entity
- Confirm Nomination
- Personal Information
- Review and Submit Profile

**Search for Nomination**

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

From the dropdown list below, select your User Type.

**Nominees for Physician or Non-Physician Practitioner authorized representatives receive only Nomination ID numbers.**

Enter your Nomination ID and Registration ID included in the nomination email you have received. Select the "Show Nomination" button to see the information associated with your nomination.

**User Type \***  
Applicable Manufacturer or Applicable Group Purchasing Organization

**Registration ID \***  
The ID is a 12-digit number.  
100001417221

**Nomination ID \***  
The ID is a 12-digit number.  
955809942552

**Show Nomination**

**Figure 51b: Search for Nomination page (BOTTOM PART) (OPS2.0)**

**Nomination Search Results:**

Review and confirm the entity identified below is correct. Select the Continue button if this is the correct entity.  
Select "Cancel" to return to the previous page if the information displayed is incorrect.

**Bill Zahm was nominated as Submitter.**

**Entity Information:** Applicable manufacturer-drugs/biologicals  
**Entity's Legal Name:** Dan's Medical Supply

[Cancel](#) [Continue](#)

Step 6: If the information is correct, select the **Continue** button to proceed.

**Figure 52a: Confirm Entity page (TOP PART) (OPS1.0)**

### Create Profile

- ✓ Select Profile Type
- ② Register Entity
  - ✓ Search Nomination
  - Entity Information**
  - Confirm Nomination
- ③ Personal Information
- ④ Review and Submit Profile

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

[Need help with the website? Contact Us by email](#)

[Review the Open Payments Privacy Policy \[PDF\]](#)

## Confirm Entity

Below is the information for your selected entity. Review and confirm the entity identified below is correct. Select "Continue" button to begin creating your user profile.

**Entity's Registration ID:** 100001436985

**Entity's Legal Name:** Dan's Medical Supply

**Reporting Entity Type:** Applicable Manufacturer

**Business Type:** Applicable manufacturer-devices/medical supplies

**Food & Drug Administration (FDA) Establishment Identifier:**

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

**URL of Parent Company:** www.cms.gov

---

### Business Address

**Country:** United States

**Business Address, Line 1:** 123 chicken st

**Business Address, Line 2:**

**City Name:** Haymarket **State:** Virginia

**Zip Code:** 20169 **Business Telephone Number:** 210-602-4955

**Figure 52b: Confirm Entity page (BOTTOM PART) (OPS1.0)**

### Business Ownership Information

**Type of Ownership:** Sole Proprietorship

**Taxpayer Identifier Number (TIN)/Employer Identification Number (EIN):** 35-9820148

**Doing Business As (DBA) Name:** Dan's Medical Supply

**Consolidated Report Type:** I don't know whether my entity's data will be submitted in a consolidated report

[Cancel](#) [Back](#) [Continue](#)

**Figure 53a: Confirm Entity page (TOP PART) (OPS2.0)**

**OPEN PAYMENTS** Home About Us Resources Contact Us

## Create Profile

- 1 Select Profile Type ✓
- 2 Entity Nomination ✓
  - Search Nomination ✓
  - Confirm Entity**
  - Confirm Nomination
- 3 Personal Information
- 4 Review and Submit Profile

### Confirm Entity

Below is the information for your selected entity. Review and confirm the entity identified below is correct. Select the "Continue" button to begin creating your user profile.

**Entity Information:**

- Entity's Registration ID: 100001417221
- Entity's Legal Name: Dan's Medical Supply
- Reporting Entity Type: Applicable Manufacturer
- Business Type: Applicable manufacturer-devices/medical supplies
- Food & Drug Administration (FDA) Establishment Identifier:
- Data Universal Numbering System (D-U-N-S® Number):
- URL of Parent Company: www.cms.gov

**Figure 53b: Confirm Entity page (BOTTOM PART) (OPS2.0)**

**Business Address:**

- Country: US
- Business Address, Line 1: 428 Hayne St
- Business Address, Line 2:
- City Name: Walkin
- State: AZ
- Zip Code: 85001
- Business Telephone Number: 210-278-9999

**Business Ownership Information:**

- Type of Ownership: Sole Proprietorship
- Taxpayer Identifier Number (TIN)/Employer Identification Number (EIN): 52-7862148
- Doing Business As (DBA) Name: Mike's Medical Supply
- Consolidated Report Type: I don't know whether my entity's data will be submitted in a consolidated report

Step 7: Select “Yes, I accept” for roles you accept and “No, I do not accept” for roles you do not accept.

**Figure 54: Confirm Nomination Page (OPS1.0)**

**Create Profile**

- ✓ Select Profile Type
- ② Register Entity
- ✓ Search Nomination
- ✓ Entity Information
- Confirm Nomination
- ③ Personal Information
- ④ Review and Submit Profile

Access the Open Payments User Guide [PDF]

Need help with the website? **Contact Us** by email

Review the Open Payments Privacy Policy [PDF]

## Confirm Nomination

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

Confirm your nomination by accepting or rejecting the user roles for which you were nominated. These roles are listed at the bottom of the page. Once you have made your choices, select the "Continue" button to proceed.

The functions of the user roles are as follows:

**Officer:**

- Updates the applicable manufacturer or applicable GPO profile information and can approve and modify nominations for user roles.
- Can deactivate other users from the entity.
- Can review and download compliance messages on behalf of the applicable manufacturer or applicable GPO.

**Submitter:**

- Submits and edits payment information on behalf of the applicable manufacturer or applicable GPO.
- The submitter role can be held by individuals from third-party entities who submit records on behalf of the applicable manufacturer or applicable GPO.

**Attester:**

- Attests to the accuracy, completeness, and timeliness of the data submitted for the applicable manufacturer or applicable GPO.
- Can submit assumptions made in the reporting of payments, other transfers of value, or ownership or investment interests.

**Compliance**

- Can review and download compliance messages on behalf of the applicable manufacturer or applicable GPO.

### Dan's Medical Supply

**\*Confirm Nominations:**

**Submitter**  Yes, I accept  No, I do not accept

Cancel
Back
Continue

**Figure 55: Confirm Nomination Page (OPS2.0)**

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[Contact Us](#)

---

### Create Profile

- ① Select Profile Type ✓
- ② Entity Nomination
- Search Nomination ✓
- Confirm Entity ✓
- Confirm Nomination
- ③ Personal Information
- ④ Review and Submit Profile

## Confirm Nomination

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

Confirm your nomination by accepting or rejecting the user roles for which you were nominated. These roles are listed at the bottom of the page. Once you have made your choices, select the "Continue" button to proceed.

**The user roles are as follows:** +

**Dan's Medical Supply**

**\*Confirm Nominations:**

Role:	
Submitter	<input checked="" type="radio"/> Yes, I accept <input type="radio"/> No, I do not accept

Back
Cancel
Continue



**Step 8:** Enter the requested information and select **Continue**.

**Figure 56a: Enter Personal Information Page (TOP PART) (OPS1.0)**

### Create Profile

- ✓ Select Profile Type
- ✓ Register Entity
- ③ **Personal Information**
- ④ Review and Submit Profile

- Access the Open Payments User Guide [PDF]
- Need help with the website? **Contact Us** by email
- Review the Open Payments Privacy Policy [PDF]

## Enter Personal Information

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

Provide personal and business information below to create your user profile.

Your first name and last name have been prepopulated from your CMS Identity Management system (IDM) profile. You may edit the prepopulated fields as needed. However, changing this information in Open Payments will not change the corresponding information in your IDM profile.

Once you have entered the information, select the "Continue" button.

### Your Name

*First Name:	Michael	*Last Name:	Standish
Middle Name:		Suffix (Jr., Sr., etc.):	

**Figure 56b: Enter Personal Information Page (BOTTOM PART) (OPS1.0)**

### Your Business Contact Information

Enter your business or entity information.

*Business Email Address:	ms@jkgghgikh.com	*Job Title:	Administrator
*Country:	United States		
*Business Address, Line 1:	234 Road		
Business Address, Line 2:			
*City Name:	San Antonio	*State:	Texas
*Zip Code:	99999 9999	*Business Telephone Number:	999-999-9999
	78244		514-856-3014

[Cancel](#) [Back](#) [Continue](#)

**Figure 57a: Enter Personal Information Page (TOP PART) (OPS2.0)**

**OPEN PAYMENTS** Home About Us Resources Contact Us

## Create Profile

- 1 Select Profile Type ✓
- 2 Entity Nomination ✓
  - Search Nomination ✓
  - Confirm Entity ✓
  - Confirm Nomination ✓
- 3 **Personal Information**
- 4 Review and Submit Profile

### Personal Information

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

Add the requested personal and business information to your user profile. Some fields are pre-populated. Review pre-populated information for accuracy and correct any invalid information.

Note that any changes made here will not automatically update your profile information in your other CMS accounts, such as your Medicare, National Plan & Provider Enumeration System (NPPEs) or Identity Management (IDM) accounts.

#### Basic Information

<b>First Name *</b> Michael	<b>Last Name *</b> Standish
<b>Middle Name</b>	<b>Suffix (Jr., Sr., etc.)</b>

**Figure 57b: Enter Personal Information Page (BOTTOM PART) (OPS2.0)**

#### Business Information

<b>Job title *</b> Administrator	<b>Email Address *</b> ms@hjlghjk.com	
<b>Country *</b> United States		
<b>Business Address, Line 1 *</b> 654 Road		
<b>Business Address, Line 2</b> Business Address, Line 2		
<b>City *</b> San Antonio	<b>State *</b> Texas	
<b>Zip Code *</b> 78244	<b>Zip Extension</b> XXXX	<b>Business Telephone Number *</b> 214-895-3047

[Back](#) [Cancel](#) [Continue](#)

Step 9: Select **Continue**. You will receive confirmation after selecting **Continue**.

**Figure 58a: Review and Submit Profile Page (TOP PART) (OPS1.0)**

### Create Profile

- ✓ Select Profile Type
- ✓ Register Entity
- ✓ Personal Information
- ④ **Review and Submit Profile**

- Access the Open Payments User Guide [PDF]
- Need help with the website? **Contact Us** by email
- Review the Open Payments Privacy Policy [PDF]

## Review and Submit Profile

Review the information on this page to ensure it is correct. Select the "Back" button to navigate to the previous pages to correct any invalid information. Select the "Continue" button to submit your profile.

**Entity's Registration ID:** 100001436985

**Entity's Legal Name:** Dan's Medical Supply

**Reporting Entity Type:** Applicable Manufacturer

**Business Type:** Applicable manufacturer-devices/medical supplies

**Food & Drug Administration (FDA) Establishment Identifier:**

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

**URL of Parent Company:** www.cms.gov

---

**Business Address:**

**Country:** United States

**Business Address, Line 1:** 123 chicken st

**Business Address, Line 2:**

**City Name:** Haymarket

**State:** Virginia

**Zip Code:** 20169

**Business Telephone Number:** 210-602-4955

**Figure 58b: Review and Submit Profile Page (BOTTOM PART) (OPS1.0)**

### Business Ownership Information

**Type of Ownership:** Sole Proprietorship

**Taxpayer Identifier Number (TIN)/Employer Identification Number (EIN):** 35-9820148

**Doing Business As (DBA) Name:** Dan's Medical Supply

---

**Will this entity's information be submitted in a consolidated report (i.e., one entity reports on behalf of another entity)?**

I don't know whether my entity's data will be submitted in a consolidated report

---

**Nominations:**

Role:	First Name:	Last Name:	Middle Name:	Suffix (Jr., Sr., etc.):	Business Email Address:
Submitter	Michael	Standish			ms@jkgghgkh.com

**Figure 59a: Review and Submit Profile Page (TOP PART) (OPS2.0)**

**OPEN PAYMENTS** Home About Us Resources Contact Us

## Create Profile

- 1 Select Profile Type ✓
- 2 Entity Nomination ✓
  - Search Nomination ✓
  - Confirm Entity ✓
  - Confirm Nomination ✓
- 3 Personal Information ✓
- 4 Review and Submit Profile

### Review and Submit Profile

Review the information on this page to ensure it is correct. Select the "Back" button to navigate to the previous pages to correct any invalid information. Select the "Submit" button to submit the profile.

**Entity Information**

Entity's Registration ID: 100001417221  
 Entity's Legal Name: Dan's Medical Supply  
 Reporting Entity Type: Applicable Manufacturer  
 Business Type: Applicable manufacturer-devices/medical supplies  
 Food & Drug Administration (FDA) Establishment Number:  
 Data Universal Number System (D-U-N-S Number):  
 URL of Parent Company: www.cms.gov

**Business Address**

Country: United States  
 Business Address, Line 1: 428 Hayne St  
 Business Address, Line 2:  
 City Name: Walkin  
 State: Arizona  
 Zip Code: 85001  
 Business Telephone Number: 210-278-9999

**Figure 59b: Review and Submit Profile Page (BOTTOM PART) (OPS2.0)**

**Business Ownership Information**

Type of Ownership: Sole Partnership  
 Taxpayer Identification Number (TIN)/Employer Identification Number (EIN): 52-7862148  
 Doing Business As (DBA) Name: Mike's Medical Supply

Will this entity's information be submitted in a consolidated report (i.e. one entity reports on behalf of another entity)?

I don't know whether my entity's data will be submitted in a consolidated report

**Nominations**


Role:	First Name:	Last Name:	Business Email Address:
Submitter	Michael	Standish	ms@hjghjk.com


The following message will appear on-screen to confirm your nomination has been successfully accepted.


**Figure 60: Success Confirmed Page (OPS1.0)**

### Create Profile

- ✓ Select Profile Type
- ✓ Register Entity
- ✓ Personal Information
- ✓ Review and Submit Profile

 **Access** the Open Payments User Guide [PDF]

 Need help with the website? **Contact Us** by email

 **Review** the Open Payments Privacy Policy [PDF]

## Success Confirmed

You have successfully accepted your affiliation with Dan's Medical Supply and created your own profile, Michael Standish.


You may now go to [Open Payments Home](#)

For help obtaining a PDF viewer, go to the [CMS.gov Help page](#).

**Figure 61: Success Confirmed Page (OPS2.0)**

## Registration Complete

✕

 **Success**

You have successfully accepted your affiliation with Dan's Medical Supply and created your own profile, Michael Standish.

You may now go to [Open Payments Home](#).

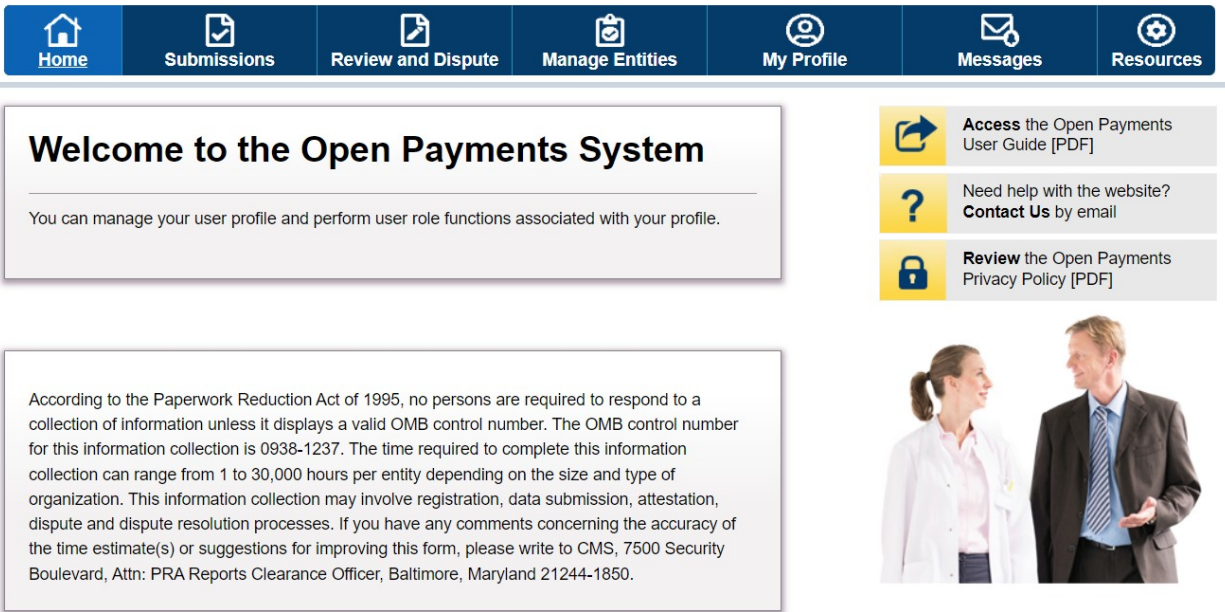
For help obtaining a PDF viewer, go to the [CMS.gov Help page](#).

[Continue to Open Payments Home Page](#)

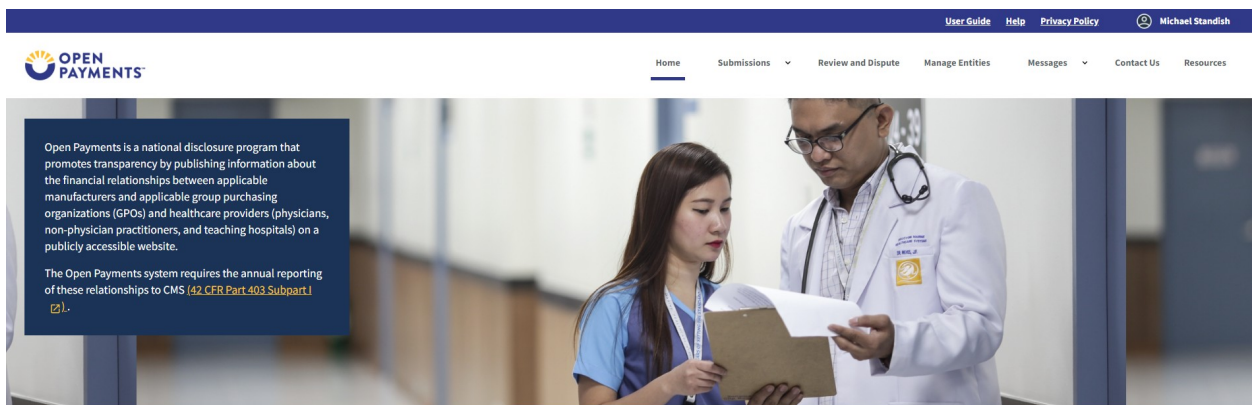
## Accepting a Nomination (Returning System Users)

Step 1: Select **My Open Payments Profile** from the header menu on the Open Payments home page.

**Figure 62: Open Payments System Landing Page for returning system users (OPS1.0)**



**Figure 63: Open Payments System Landing Page for returning system users (OPS1.0)**



Step 2: Select the My Roles and Nominations link.

**Figure 64: My Profile Page (OPS1.0)**

The screenshot shows the 'My Profile' page with a top navigation bar containing: Home, Submissions, Review and Dispute, Manage Entities, My Profile (active), Messages, and Resources. Below the navigation bar, the 'My Profile' title is followed by three tabs: Overview (active), Profile Details, and My Roles & Nominations. A main content box contains the following text:

This page contains information about your authorized role(s)  
 An explanation of the statuses below can be found in the [Open Payments User Guide \[PDF\]](#).

**Profile Name**  
 Michael Standish

**Your Authorized Roles**

Role:	Entity:	Status:
Submitter	Dan's Medical Supply	Accepted

**Recent Notifications**  
 There are no recent notifications for this profile.

On the right side, there are three utility links: 'Access the Open Payments User Guide [PDF]', 'Need help with the website? Contact Us by email', and 'Review the Open Payments Privacy Policy [PDF]'. Below these links is a photograph of a man and a woman in professional attire.

**Figure 65a: My Profile Page (TOP PART) (OPS2.0)**

The screenshot shows the 'My Profile' page with the 'OPEN PAYMENTS' logo on the left and a top navigation bar with: Home, Submissions, Review and Dispute, Manage Entities, Messages, Contact Us, and Resources. The 'My Profile' title is followed by a sidebar menu with: My IDM Portal Profile, My Open Payments Profile, Overview (active), Profile Details, and My Roles & Nominations. The main content area is titled 'Overview' and contains the following text:

This page contains information about authorized roles.  
 An explanation of the statuses below can also be found in the [Open Payments User Guide \[PDF\]](#).

**Profile Name**  
 Michael Standish

**User Role Statuses for Reporting Entities**

Nominated	The individual has been nominated for the user role with the reporting entity.
Nomination Approved	The individual's nomination has been approved by an officer. The individual has not yet accepted or declined the nomination.
Declined	The individual declined the user role.
Accepted	The individual accepted the user role.
Requested	An individual self-nominated for the user role.
Approved	The individual's self-nomination for the user role has been approved by an officer with the entity.
Vetted	The entity has successfully been vetted by the Open Payments system. The individual holds the officer user role. (Applicable only to the individual who registered the reporting entity and only for that individual's officer user role)
Conditionally Active	The entity has been conditionally approved by the Open Payments Help Desk. The individual holds the officer user role. See Section 3.7a. (Applicable only to the individual who registered the reporting entity and only for that individual's officer user role)

**Figure 65b: My Profile Page (BOTTOM PART) (OPS2.0)**

Your Authorized Roles

Role:	Entity:	Status:
Submitter	Dan's Medical Supply	Accepted

Recent Notifications

There are no recent notifications for this profile.

Step 3: On the “My Roles and Nominations” page, select **Accept a Role**.

**Figure 66: My Roles and Nominations Page (OPS1.0)**

Home Submissions Review and Dispute Manage Entities **My Profile** Messages Resources

## My Profile

Overview Profile Details **My Roles & Nominations**

Below are your user roles for each entity with which you are affiliated. You have the option to accept additional roles or request additional roles for your affiliated entities.

An explanation of the statuses below can be found in the [Open Payments User Guide \[PDF\]](#).

**Accept a Role** **Request a Role**

**My Roles**

Role:	Name:	Status:
Submitter	Dan's Medical Supply	Accepted

Access the Open Payments User Guide [PDF]

Need help with the website? **Contact Us** by email

Review the Open Payments Privacy Policy [PDF]

**Figure 67: My Roles and Nominations Page (OPS2.0)**

OPEN PAYMENTS

Home Submissions Review and Dispute Manage Entities Messages Contact Us Resources

## My Profile

- My IDM Portal Profile
- My Open Payments Profile
- Overview
- Profile Details
- My Roles & Nominations**

### My Roles & Nominations

Below are your user roles for each entity with which you are affiliated. You have the option to accept the additional roles or request additional roles for your affiliated entities.

An explanation of the statuses below can be found in the [Open Payments User Guide \[PDF\]](#).

**Accept a Role** **Request a Role**

**My Roles**

Role	Entity	Status
Submitter	Dan's Medical Supply	Accepted

The rest of the process follows “Accepting a Nomination for First Time Users” Please see Figure 46 and onwards.



## Self-Nomination with a Registered Entity (First Time System Users)

Step 1: Select **Create My Profile** to begin the registration process.

**Figure 68: Open Payments System Landing Page for first-time system users (OPS1.0)**

The screenshot shows the landing page for the Open Payments System. At the top, the title "Open Payments (Sunshine Act)" is displayed in a large, bold font. Below the title, there is a main heading "Welcome to the Open Payments System" followed by a red warning message: "Our records indicate that you have not yet registered in the Open Payments system. Before you can perform any actions in the system, you must first create your profile and complete the registration process." To the right of this message is a prominent blue button labeled "Create My Profile". Further right, there are three utility links: "Access the Open Payments User Guide" (with a document icon), "Need help with the website? Contact Us by email" (with a question mark icon), and "Review the Open Payments Privacy Policy [PDF]" (with a lock icon). Below these links is a photograph of a female doctor and a male doctor in white coats looking at a document together.

**Figure 69: Open Payments System Landing Page for first-time system users (OPS2.0)**

The screenshot shows the updated landing page for the Open Payments System. At the top left is the "OPEN PAYMENTS" logo. At the top right is a navigation menu with links for "Home", "About Us", "Resources", and "Contact Us". The main content area features a large background image of a doctor and a nurse reviewing a document. On the left side of this image, there is a text box explaining the program: "Open Payments is a national disclosure program that promotes transparency by publishing information about the financial relationships between applicable manufacturers and applicable group purchasing organizations (GPOs) and healthcare providers (physicians, non-physician practitioners, and teaching hospitals) on a publicly accessible website. The Open Payments system requires the annual reporting of these relationships to CMS (42 CFR Part 403 Subpart I)." Below the main image is a yellow warning banner with a triangle icon and the heading "Create Profile". The message in the banner reads: "Our records indicate that you have not yet created a profile in the Open Payments system. Before you can perform any actions in the system, you must first create your profile and complete the registration process." A blue "Create Profile" button is located at the bottom right of the banner. Below the banner is a section titled "Your Current Registration Process" which contains a progress bar with three steps: "Register through IDM" (completed), "Request access to Open Payments" (completed), and "Create profile" (in progress). At the bottom left, there is a link: "Need help creating your Open Payments System profile?"

Step 2: Select “Start Profile” at the bottom of the page when you are ready to continue.

**Figure 70: Create Profile Page (OPS1.0)**

**Create Profile**

To begin creating a profile and registering in the Open Payments system, you must identify your affiliation with an applicable manufacturer, applicable group purchasing organization (GPO), teaching hospital, physician, or non-physician practitioner. Users with provider type of Physician Assistant, Nurse Practitioner, Clinical Nurse Specialist, Certified Registered Nurse Anesthetist, Certified Nurse-Midwife, or Anesthesiologist Assistant are called Non-Physician Practitioner in the Open Payments system.

If the applicable manufacturer, applicable GPO, teaching hospital, physician, or non-physician practitioner has not registered in the Open Payments system, you may register them and then yourself.

For reporting entities, prior to beginning registration, collect the information required for reporting entity registration, then proceed with the registration process.

For reporting teaching hospital, physician, or non-physician practitioner registration, prior to beginning registration, collect the information required for covered recipient registration, then proceed with the registration process.

If the applicable manufacturer, applicable GPO, teaching hospital, physician, or non-physician practitioner has already been registered in the Open Payments system and you have not affiliated with them in the Open Payments system, you may:

- Ask a user already affiliated with the reporting entity or covered recipient to nominate you for a user role; or
- Create a personal profile and request a role with the reporting entity or covered recipient user. Note that users who wish to associate themselves with physicians or non-physician practitioner must be nominated by the physician or non-physician practitioner.

**Figure 71: Create Profile Page (OPS2.0)**

**OPEN PAYMENTS**

Home About Us Resources Contact Us

## Create Profile

### Creating a Profile

To begin creating a profile and registering in the Open Payments system, you must identify your affiliation with an applicable manufacturer, applicable group purchasing organization (GPO), teaching hospital, physician, or non-physician practitioner. Users with provider type of Physician Assistant, Nurse Practitioner, Clinical Nurse Specialist, Certified Registered Nurse Anesthetist, Certified Nurse-Midwife, or Anesthesiologist Assistant are called Non-Physician Practitioners in the Open Payments system.

For reporting entities, prior to beginning registration, collect the information required for reporting entity registration, then proceed with the registration process.

For reporting teaching hospital, physician, or non-physician practitioner registration, prior to beginning registration, collect the information required for covered recipient registration, then proceed with the registration process.

If the applicable manufacturer, applicable GPO, teaching hospital, physician, or non-physician practitioner has already been registered in the Open Payments system and you have not affiliated with them in the Open Payments system, you may:

- Ask a user already affiliated with the reporting entity or covered recipient to nominate you for a user role; or
- Create a personal profile and request a role with the reporting entity or covered recipient user. Note that users who wish to associate themselves with physicians or non-physician practitioners must be nominated by the physician or non-physician practitioner.

Step 3: Select the profile type “Applicable manufacturer or applicable group purchasing organization (GPO)” and select **Continue**.

Figure 72: Select Profile Type Page (OPS1.0)

### Create Profile

- 1 Select Profile Type
- 2 Register Entity
- 3 Personal Information
- 4 Review and Submit Profile

- Access the Open Payments User Guide
- Need help with the website? Contact Us by email
- Review the Open Payments Privacy Policy [PDF]

## Select Profile Type

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

If you received a nomination ID and/or registration ID in an email notifying you of your nomination for a user role, begin creating your profile by selecting the "I have a Nomination ID and/or a Registration ID" link.

If you did not receive a nomination ID and/or a registration ID in an email, begin creating your profile by indicating whether you are a reporting entity or covered recipient.

Note: If you are a physician who works at a teaching hospital and wish to see data related to you in your capacity as a physician, select the "Physician or Non-Physician Practitioner" option when registering. Registering as a user affiliated with a teaching hospital will allow you to see only data related to that teaching hospital and not your records. You may register as both a physician and a user affiliated with a teaching hospital if needed.

If you have any questions regarding the user type you should register as, please contact the Open Payments Help Desk [openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov) for guidance.

**\* Required: Select the type of entity or covered recipient you are affiliated with OR the "I have a Nomination ID and/or a Registration ID" link.**

- Applicable manufacturer or applicable group purchasing organization (GPO)
- Physician or Non-Physician Practitioner
- Teaching hospital

----- OR -----

[I have a Nomination ID and/or a Registration ID](#)

[Cancel](#) [Continue](#)

v - chlicc@index-analytics.com - Outlook

Figure 73: Select Profile Type Page (OPS2.0)

Home About Us Resources Contact Us

## Create Profile

- 1 Select Profile Type
- 2 Register Entity
- 3 Personal Information
- 4 Review and Submit Profile

### Select a Profile Type

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

If you received a nomination ID and/or registration ID in an email notifying you of your nomination for a user role, begin creating your profile by selecting the "I have a Nomination ID and/or a Registration ID" link.

If you did not receive a nomination ID and/or a registration ID in an email, begin creating your profile by indicating whether you are a reporting entity or covered recipient.

**Note:**

If you are a physician who works at a teaching hospital and wish to see data related to you in your capacity as a physician, select the "Physician or Non-Physician Practitioner" option when registering. Registering as a user affiliated with a teaching hospital will allow you to see only data related to that teaching hospital and not your records. You may register as both a physician and a user affiliated with a teaching hospital if needed.

If you have any questions regarding the user type you should register as, please contact the Open Payments Help Desk [openpayments@cms.hhs.gov](mailto:openpayments@cms.hhs.gov) for guidance.

**Required: Select the type of entity or covered recipient you are affiliated with OR the "I have a Nomination ID and/or a Registration ID" \***

- I have a Nomination ID and/or a Registration ID
- Applicable Manufacturer or applicable Group Purchasing Organization (GPO)
- Physician or Non-Physician Practitioner
- Teaching hospital

[Cancel](#) [Continue](#)

**Step 4:** Enter the Taxpayer Identification Number/Employer Identification Number (TIN/EIN) of the reporting entity that you want to associate yourself with. The TIN must be nine digits. Select Find.

**Figure 74: Find an Entity Page (OPS1.0)**

**Create Profile**

- Select Profile Type
- 2 Register Entity**
- 3 Personal Information
- 4 Review and Submit Profile

**Access** the Open Payments User Guide [PDF]

Need help with the website? **Contact Us** by email

**Review** the Open Payments Privacy Policy [PDF]

## Find an Entity

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

To find an entity in the Open Payments system, enter the entity's Taxpayer Identification Number (TIN)/Employer Identification Number (EIN) below.

### If the Entity's TIN/EIN Is Not Found

If the TIN/EIN entered does not return any results, the entity has not yet been registered within the Open Payments system. An Officer must register the entity by selecting the "Register Your Entity on Open Payments" link. Note: The Officer must also register themselves for the officer user role when registering an entity. You may hold more than one user role.

### If the Entity's TIN/EIN Is Found

If the TIN/EIN search returns results, check the results to see if the entity you wish to register with is listed. If the entity is not listed, an Officer must register the entity by selecting "Other." If the search results contain the entity you wish to associate yourself with, you may select that entity and proceed with creating your personal profile and nominating yourself for a role with that entity.

Required: Enter the TIN/EIN of the entity.

**\*Enter TIN/EIN:**  
99-9999999  
35-9820148 **Find**

**Cancel** **Back**

**Figure 75: Find an Entity Page (OPS2.0)**

**OPEN PAYMENTS** Home About Us Resources Contact Us

## Create Profile

- 1 Select Profile Type
- 2 Register Entity 
  - Find an entity**
  - Your Roles
  - Nominate Additional Roles
- 3 Personal Information
- 4 Review and Submit Profile

## Find an Entity

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

To find an entity in the Open Payments system, enter the entity's Taxpayer Identification Number (TIN)/Employer Identification Number (EIN) below.

### TIN/EIN

**If the Entity's TIN/EIN is Not Found** ❌  
If the TIN/EIN entered does not return any results, the entity has not yet been registered within the Open Payments system. You may register the entity by selecting the "Register Your Entity on Open Payments" link. Note: You must also register yourself as the officer user role when registering an entity. You may hold more than one user role.

**If the Entity's TIN/EIN is Found** ✅  
If the TIN/EIN search returns results, check the results to see if the entity you wish to register with is listed. If the entity is not listed, you may register the entity by selecting "Other". If the search result contain the entity you wish to associate yourself with, you may select that entity and proceed with creating your personal profile and nominating yourself for a role with that entity.

**\* Enter TIN/EIN of the entity: (12-1234567)**  
52-7862148 **Find Entity**

**Back** **Cancel**

Step 5: Select the correct entity from the list displayed and select **Continue**.

**Figure 76: Find an Entity Page (OPS1.0)**

**Create Profile**

- ✓ Select Profile Type
- 2 Register Entity**
- 3 Personal Information
- 4 Review and Submit Profile

Access the Open Payments User Guide [PDF]

Need help with the website? **Contact Us** by email

Review the Open Payments Privacy Policy [PDF]

## Find an Entity

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

To find an entity in the Open Payments system, enter the entity's Taxpayer Identification Number (TIN)/Employer Identification Number (EIN) below.

### If the Entity's TIN/EIN Is Not Found

If the TIN/EIN entered does not return any results, the entity has not yet been registered within the Open Payments system. An Officer must register the entity by selecting the "Register Your Entity on Open Payments" link. Note: The Officer must also register themselves for the officer user role when registering an entity. You may hold more than one user role.

### If the Entity's TIN/EIN Is Found

If the TIN/EIN search returns results, check the results to see if the entity you wish to register with is listed. If the entity is not listed, an Officer must register the entity by selecting "Other." If the search results contain the entity you wish to associate yourself with, you may select that entity and proceed with creating your personal profile and nominating yourself for a role with that entity.

Required: Enter the TIN/EIN of the entity.

**\*Enter TIN/EIN:**  
99-9999999  
35-9820148 **Find**

**\*For the TIN/EIN entered above, the following entities were identified:**

- Dan's Medical Supply (Entity's Registration ID: 100001436985)

**Cancel** **Back** **Continue**

**Figure 77: Find an Entity Page (OPS2.0)**

**Create Profile**

- 1 Select Profile Type ✓
- 2 Register Entity**
- 3 Personal Information
- 4 Review and Submit Profile

**Find an Entity**

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

To find an entity in the Open Payments system, enter the entity's Taxpayer Identification Number (TIN)/Employer Identification Number (EIN) below.

**TIN/EIN**

**If the Entity's TIN/EIN is Not Found** ❌  
If the TIN/EIN entered does not return any results, the entity has not yet been registered within the Open Payments system. You may register the entity by selecting the "Register Your Entity on Open Payments" link. Note: You must also register yourself as the officer user role when registering an entity. You may hold more than one user role.

**If the Entity's TIN/EIN is Found** ✅  
If the TIN/EIN search returns results, check the results to see if the entity you wish to register with is listed. If the entity is not listed, you may register the entity by selecting "Other". If the search result contain the entity you wish to associate yourself with, you may select that entity and proceed with creating your personal profile and nominating yourself for a role with that entity.

**\* Enter TIN/EIN of the entity:** (12-1234567)  
52-7862148 **Find Entity**

For the TIN/EIN entered above, the following entities were identified:

- \*Select your entity if listed, otherwise please register your entity.
- Dan's Medical Supply (Entity's Registration Id: 100001417221)

**Back** **Cancel** **Continue**

Step 6: The rest of this process follows “Accepting a Nomination” workflow. Please see Figure 46 and beyond.







