FAQs for Open Payments Mobile for Physicians & Open Payments Mobile for Industry

1. **NEW: Do the mobile apps store or capture patient data?**

   Answer: No, the mobile apps do not capture or store patient data. They are solely available to help physicians, applicable manufacturers, and applicable Group Purchasing Organizations (GPOs) track physician and industry contact details, share information between the physician and industry apps using mobile technology, and track payments and other transfers of value in real-time.

2. **NEW: What enhancements have been made to the applications, since they initially launched in July 2013?**

   Answer: In response to user feedback, the table below describes the numerous enhancements that have been made to the apps since their initial launch in July, 2013. All changes are intuitive and will add elements of ease expected by app users.

Enhancement Topic	Details – What It Does
Changes that Apply to Both Apps (*Open Payments Mobile for Industry* and *Open Payments Mobile for Physicians*)	
Streamlined "Welcome" screen options	• A number of infrequently used menu options (e.g., "Program Information" and "Change Password") moved from the "Welcome" screen and now appear in a hidden menu. • To access the menu, swipe to the right at the "Welcome" screen.
Reports/Statistics button	• A new "Reports/Statistics" button, accessible on the "Welcome" screen, allows the user to create a chart (bar and pie), showing their transfer of value data sorted by physician (within *Open Payments Mobile for Industry*) or vendor (within *Open Payments Mobile for Physicians*). • This new chart creation capability will streamline data review.
CSV exporting	• When payment data is exported via CSV format, **all** profile data for the associated vendor/physician is included in the CSV file (including address, phone number, etc.). • The prior app version included only vendor/physician name in the CSV file. This enhancement will simplify the data review process.
Streamlined "Add Payment" process	• The steps to "Add Payment" are streamlined to allow the user to enter contact information for the vendor or physician, while staying within the "Add Payment" menu. • The prior app version required the user to first enter contact information for the vendor or physician separately, and then go to the "Add Payment" menu.
Easy payment duplication	• A new button available on the "View Payment" screen allows payment data to be easily duplicated, in case a physician or vendor has multiple occurrences of the same payment. • The only data field that needs to be re-entered is the date.

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Enhancement Topic	Details – What It Does
Vendors/Physicians sorted alphabetically	• In "Manage Vendors/Physicians," vendors or physicians are now listed alphabetically. • The prior app version listed vendors and physicians in the order in which they were entered.
Email/print QR Code added	• A "Share" button is available to email or print a QR Code that is generated within the app, for sharing at a later time.
Payment QR Code warning added	• After a payment QR Code is scanned, a red warning message appears to remind the user to manually add the vendor or physician name to the payment data conveyed in the QR Code.
Additional data elements added in "Add Payment" > "Travel & Lodging"	• When nature of payment in "Add Payment" is "Travel & Lodging," the following additional data elements can be entered: city, state, and country of travel (note that these new data elements are required for reporting purposes; but remember, the apps are not used for reporting data, only for tracking it).
Tablet support	• Both apps are optimized for viewing on tablet devices.
	Changes that Apply to Just One App *Open Payments Mobile for Physicians*
"Manage Companies" added	• Within "Manage Vendors", a new data field allows users to assign vendors to companies when entering new vendor information. • Company information is needed for the "Reports/Statistics" functionality to illustrate all payments by company name.

3. **Why did the Centers for Medicare & Medicaid Services (CMS) develop mobile applications (apps) for the Open Payments program?**

Answer: CMS developed two mobile apps to serve as tools that can be used by physicians, applicable manufacturers, and applicable GPOs to track payments and other transfers of value made throughout the year. The mobile apps can be downloaded free of charge and used easily and conveniently on a mobile device.

The mobile apps allow both industry and physician users to track payments and other transfers of value in real-time. One app is targeted specifically to physicians (*Open Payments Mobile for Physicians*) and one is for industry, including applicable manufacturers and applicable GPOs (*Open Payments Mobile for Industry*).

Although physicians themselves are not required to report anything, they can use the mobile apps to help them track and ensure accuracy of information on their financial relationships that will be reported by industry.

One of the key app features allows information to be transferred between both apps; profile contact information and the details of events surrounding the payments or

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transfers of value can be transmitted between both apps. Ultimately, the goal of these apps is to make tracking payment information easier and more convenient, and to improve the accuracy of payment information by tracking payments as they occur throughout the year. The apps can be used for personal information collection and storage only; *they will not interact with CMS systems, or CMS contractors, and cannot be used directly for data reporting to CMS or its contractors.*

4. **Which app should physicians download?**

   Answer: Physicians should use the *Open Payments Mobile for Physicians* app (see app icon below).

   Physician

5. **Open Payments also applies to dentists, chiropractors, and other physician specialties. Can dentists and chiropractors also use the *Open Payments Mobile for Physicians* app?**

   Answer: Yes, all types of physicians under this program, including dentists and chiropractors, may use this mobile app for tracking purposes.

   This mobile app can be used by anyone wanting to maintain their own records of payments or other transfers of value received from drug, medical device, biological and medical supply manufacturers as long as they find this tool useful. See the program website for a full list of physician types covered by this program (http://go.cms.gov/openpayments).

6. **Which app should applicable manufacturers and applicable GPOs download? What other resources are available to teaching hospitals to track transfers of value?**

   Answer: Applicable manufacturers and applicable GPOs should use the *Open Payments Mobile for Industry* mobile app (see mobile app icon below).

   CMS has not yet developed specific resources for teaching hospitals to track transfers of value. However, since the mobile devices are open to the general public, any one that is

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employed by a teaching hospital can use the apps for their personal use. The app most appropriate for teaching hospital use would be *Open Payments Mobile for Physicians.* CMS has developed a website dedicated to teaching hospitals specific to Open Payments on its website (http://go.cms.gov/openpayments). The Open Payments website contains fact sheets, operational information and FAQs.

Industry

7. **Are the mobile apps compatible with the operating system on my mobile device?**

   Answer: These physician and industry mobile apps are supported for the iPhone™ (iOS 6.0 or higher) and Android-based phones (2.3.3 or higher).

8. **Do I need to register with CMS to use the mobile apps?**

   Answer: No, you do not need to register with CMS to use the mobile apps. You can download the mobile apps directly from your app store (e.g. iOS Apple™ or GooglePlay™).

   Upon launching the mobile app for the first time, you will need to establish a password and create your own security question and answer.

9. **Do I have to use the mobile apps?**

   Answer: No, you do not need to use the mobile apps. CMS is making these free tools available to the public, geared towards physicians, applicable manufacturers, and applicable GPOs who have the option of using it to track payments and other transfers of value made throughout the year.

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10. How do I download the mobile apps to my Android-based smartphone?

Answer: Visit the Google Play Store online or on your phone and follow the steps listed below.
1. Select "Search."
2. Search for *Open Payments Mobile for Physicians* or *Open Payments Mobile for Industry* depending on which app you are downloading.
3. Select "Install" and the app will download to your device.

11. How do I download the apps to my iPhone™?

Answer: Visit the iOS Store online and follow the directions below.
1. Select "Search."
2. Search for *Open Payments Mobile for Physicians* or *Open Payments Mobile for Industry* depending on which app you are downloading.
3. Tap *Open Payments Mobile for Physicians* or *Open Payments Mobile for Industry* depending on which app you are downloading.
4. Tap "Free."
5. Once the "Free" prompt changes to "Install," tap "Install" and enter your Apple ID password; push "OK."

Note: You may need to authenticate with your Apple credentials to initiate the installation.

12. Why should physicians use the *Open Payments Mobile for Physicians* mobile app?

Answer: Although physicians are not required to report payments or other transfers of value received under Open Payments, they will be the subject of data reporting by applicable manufacturers and GPOs; that reported data will ultimately be made public by CMS. Therefore, it is in physicians' interest to keep close track of payments they receive so they can more easily review information that will be reported about them before it becomes public. Physicians should use the mobile app because it is an easy and convenient tool for tracking payments or other transfers of value made to them during the year. The mobile app:

- Allows a physician to track payments and other transfers of value in real-time, as they occur throughout the year.

- Transfers to industry representatives profiles and high level information associated with the event or situation in which the transfer of value occurred.
- Collects personal information and serves as a storage depository only, enabling greater data accuracy; *it does not interact with CMS systems, CMS contractors, and cannot be used directly for data reporting to CMS or its contractors.*

13. What are the features of the *Open Payments Mobile for Physicians* mobile app?

Answer: The app allows the user to:
- Password-protect their information.
- Store their own personal profile information such as name, address, contact information, National Provider Identifier (NPI), state medical license number, and other information for easy retrieval and transfer to industry representatives at the time of the event or interaction.
- Create or import (using a Quick Response (QR) Code reader) a contact for industry representatives.
- Record details of each payment or transfer of value.
- View, edit, or delete a payment or transfer of value.
- Generate a QR Code to assist in the transfer of information to another user's device. Information that can be transferred includes a physician's profile, industry representative's profile, and details associated with the situation in which the payment or other transfer of value occurred.
- Export a summary of stored data (using email) in a Comma Separated Value (CSV) file format. The user can email themselves the data to store on a computer or other device, and can then refer to it when reviewing transactions annually.
- Access the official Open Payments website and other resources to learn more about the program and other general information.

14. Why should applicable manufacturers and applicable GPOs use the *Open Payments Mobile for Industry mobile app*?

Answer: Industry representatives can use the app as a tool to make tracking easy and convenient. The app:
- Tracks payments and other transfers of value to physicians in real-time.
- Transfers profile and event information between physicians and industry users.
- Reduces the reporting burden for industry users and helps to ensure greater data accuracy.

- Collects personal information and serves as a storage depository only; *it does not interact with CMS systems, or CMS contractors, and cannot be used directly for data reporting to CMS or its contractors.*

15. What are the features of the *Open Payments Mobile for Industry mobile app*?

Answer: The app allows the user to:
- Password-protect their information.
- Store their own personal profile information such as name, address, and contact information for easy retrieval and transfer to physicians at the time of the event or interactions with physicians.
- Create or import (using a QR Code reader) physician contact information.
- Record details of each payment or transfer of value.
- View, edit, or delete a payment or transfer of value.
- Generate a QR Code to transfer information about a user's profile or a payment event to another app user's device.
- Export a summary of stored data (using email) in a CSV file format. The user can email themselves the data to store on a computer or other device, and can then refer to it when reviewing transactions annually.
- Access the official Open Payments website and other resources to learn more about the program and other general information.

16. Are the apps free of charge?

Answer: Yes, the apps are available free of charge.

17. Where is the data entered in the apps stored?

Answer: All data entered into the apps is stored locally on the user's device. A regular backup of this technology is recommended.

18. Will CMS use data from the apps?

Answer: No. The apps do not communicate with CMS, and the data stored using the app is owned by the users. *CMS will not validate the accuracy of data stored in the app, nor will it be responsible for protecting data stored in the app.* In addition, reporting entities have

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sole responsibility for the accuracy and completeness of the data submitted to CMS under Open Payments.

19. Can I submit data to CMS using the apps?

Answer: No. The apps cannot be used as a tool to submit data to CMS regarding financial payments or other transfers of value. The apps do allow users to export a summary of stored data in a CSV file format for their use in tracking payments and other transfers of value.

20. What security features are built into the apps?

Answer: The following security features have been built into the apps:

- Password: Upon logging into each app for the first time, you will select a password. The password must be eight characters long.
- Creation of Security Question and Answer: Upon logging into each app for the first time, you will create a security question and answer. The security question and answer are self-determined.
- "Forgot Password?" Feature: In the event that you forget your password, simply click the "Forgot password?" link on the initial login page and provide the answer to your security question. Once the answer is verified, you will be prompted to select a new password.
- Automatic Erase Feature: The apps allow you to enter your password up to 10 times. If you do not enter the correct password at the 11th attempt, the information stored on the device will be erased.
- Automatic Log-off: Once you leave the app, it automatically closes and requires you to log back in.

21. What do I do if I forget my password?

Answer: In the event that you forget your password, simply click the "Forgot password?" link on the initial login page and provide the answer to your security question. Once the answer is verified, you will be prompted to select a new password.

22. What happens if I do not enter my password correctly?

Answer: The apps allow you to enter your password up to 11 times. If you do not enter the correct password at the 11th attempt, the information stored on the device will be erased.

23. How do I receive updates for the apps?

Answer: Updates to the apps will be made through the respective app stores (just like how updates are controlled for other apps).

24. How do I transfer my profile and/or payment information to another mobile device?

Answer: Transferring information between devices occurs through the creation and scanning of a QR Code. One app will create a QR Code with the data embedded and the other app will scan the QR Code and transfer the data accordingly. Both profile and payment information may be transferred between devices. Note that profile information must be transferred separately from payment information (i.e., through two different QR Codes).

25. Why didn't the vendor or physician profile information transfer after scanning a QR Code for a payment?

Answer: In order to attach a physician or vendor profile to a payment transaction, you should first scan the QR Code for the physician or vendor profile. Once the physician or vendor profile is saved by scanning the physician or vendor QR Code, you are ready to scan a payment QR Code. After scanning the payment QR Code, select "Edit Payment", choose the appropriate physician or vendor from the "Select Physician" or "Select Vendor" drop-down menu, and lastly, select "Save Payment". If the QR Code for the physician or vendor information is not available to you, you can still scan the QR Code for the payment and manually enter the physician or vendor profile. Once the physician or vendor profile is entered manually; you can select View Payments, select the correct payment, choose Edit Payment, and then select the appropriate physician or vendor from the Select Physician or Select Vendor drop-down menu.

26. When I transmit information through a QR Code, will payment notes be transferred along with the payment or transfer of value event information?

Answer: Yes. Your payment notes will also be transferred through the QR Code, along with other payment or transfer of value event information that you send to another user.

27. **I've purchased a new mobile device – can I transfer the information already stored on my old phone to my new phone?**

    Answer: No, you will not be able to transfer the information from your old phone to your new phone. We suggest that you export the information to another device before discontinuing use of your old phone.

28. **What if I have questions or comments about the apps?**

    Answer: Please send questions or comments regarding the mobile apps to the Open Payments help desk email address at OpenPayments@cms.hhs.gov.

29. **Where can I find general information on the Open Payments program?**

    Answer: http://go.cms.gov/openpayments

30. **How do I access other government apps?**

    Answer: For more applications offered by the Federal government or using government data, see GSA's website: http://apps.usa.gov.

31. **Teaching hospitals are also impacted by Open Payments. Can teaching hospitals also use the mobile apps to track payments and other transfers of value?**

    Answer: Staff of teaching hospitals can also use the *Open Payments Mobile for Physicians* app to track payments or other transfers of value they received from applicable manufacturers and applicable GPOs throughout the year. It is important to note that the app will allow users to collect personal information and serve as a storage depository only; *it does not interact with CMS systems, CMS contractors, and cannot be used directly for data reporting to CMS or its contractors.*