



## Quick Start Guide - Account Setup

From the menu bar: **Setup**

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This document is organized into the following sections:

ACCOUNT PREFERENCES

COMPANY INFORMATION

PRODUCT INFORMATION

USER MAINTENANCE

PRINCIPAL INVESTIGATOR (PI) INFORMATION

AUTOMATION OPTIONS

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Any time you log into SunshineSpend - you will be shown your account **Dashboard**. Your **Dashboard** will display anywhere from zero to seven 'Reminder Notes' ("stickies").

As you complete the various **Setup** tasks, the Reminder Notes will disappear.

The setup tasks that must be completed in order to generate CMS reports are:

- Company Information
- Product Information

If you are going to be generating CMS Open Payments research type reports, you may need to set up Principal Investigators.

If your organization will have multiple Users logging in and you want to limit which SunshineSpend operation they can perform, you will want to set up various User Accounts.

Finally, and no less important than the above, we recommend you set up one or more of the Automation Options - these are options that apply to all the payments you input and will

save time during the remediation steps. The default values can always be overridden in remediation. Refer to the 'Data Management' quick start guide for more information.

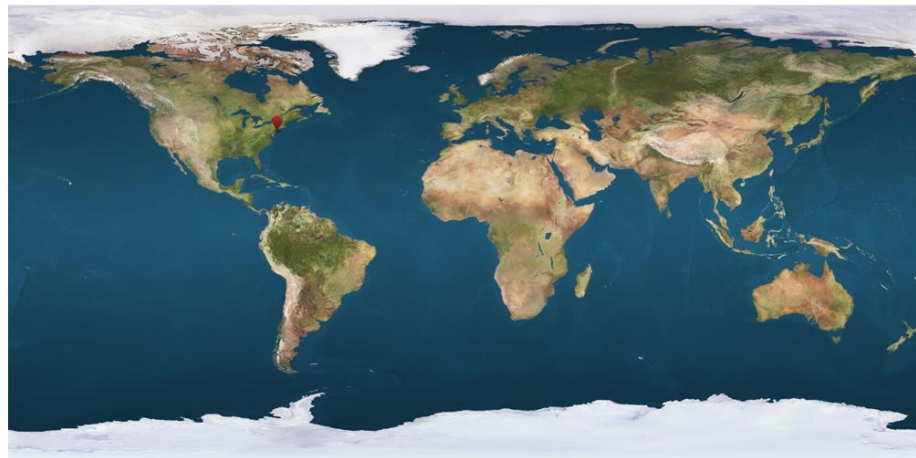
**\*REMEMBER:**  
set your time zone preference to ensure accurate time log information in your data

## ACCOUNT PREFERENCES

The default Time Zone used is US Eastern Time (America/New York). Select the Time Zone you or your organization operates in.

### Time Zone Preference

Select your **Time Zone Preference** by clicking on your geographic region. Doing so allows for tracking file uploads and remediation updates using your time zone.



Country:  Time Zone:

**\*SAVE TIME!**  
simplify payment remediation - enter your Company Information

## COMPANY INFORMATION

You will be asked to enter your organizations CMS Open Payments Manufacturer Group Purchasing Organization (GPO) Name and Registration ID. These values are available in your organization's CMS Enterprise Portal account.

Don't already have a CMS Enterprise Portal account? You can create one at <https://portal.cms.gov/portal/>

Your organization will need an account in order to upload your reports.

## Add Company Information

Use rollover text for more detail on entry requirements and use.



*"TO DO:  
simplify payment  
remediation - enter  
your Product  
Information*

*PRODUCT  
UPDATES:  
there are Device  
and/or Medical  
Supply products  
defined that MAY  
need PDIs*

## PRODUCT INFORMATION

When a payment is made to a Physician, Practitioner or Teaching Hospital it is likely related to 1 or more of your Products. Instead of specifying all the Product information for each payment, SunshineSpend asks you to set up your Product Information (one or more products) as a separate step - and provide each Product with a Nickname. Then, when a payment is inputted into SunshineSpend, you simply need to select the associated product nickname from a dropdown type list.

The Product Information set up page will lead you through the mandatory vs. optional values. Validation is performed on each input field (required, value formats, etc.) and if you have questions about the input fields, we recommend putting your mouse over the information icon ("i") to the right of each input.

## Add Product Information

Use rollover text for more detail on entry requirements and use.

ⓘ

ⓘ

Covered

 ⓘ

Type

 ⓘ

ⓘ

[For Drugs & Biologicals: Search the NDC](#) ⓘ

ⓘ

[For Devices & Medical Supplies: Search the NIH](#) ⓘ

Primary Device Identifier 1

Primary Device Identifier 2

Primary Device Identifier 3

Primary Device Identifier 4

Primary Device Identifier 5

### DID YOU KNOW?

you can set up  
additional user  
logins for your  
account

## USER MAINTENANCE

SunshineSpend allows your organization to set up an unlimited number of account logins - each with access to different tasks. This can be useful for organizations that have different users that input data, remediate data, generate reports, etc. By default, your primary SunshineSpend account has access to all functionality.

# Add User

(all fields required)

quickstart@choicenetworks.com

\*\*\*\*\*

(nickname will automatically be prefixed with 'quickstart\_')

User Nickname

This User has access to:

- ☒ Setup / Account Configuration ⓘ
- ☒ ezAdd - add single Payment Record ⓘ
- ☒ Upload / HCP Scrub & Import Payment Records ⓘ
- ☒ View Payment Records ⓘ
- ☒ Remediate Payment Records ⓘ
- ☒ Save / Download Payment Records ⓘ
- ☒ Delete Data & Setup Info ⓘ
- ☒ Generate Reports ⓘ

SET UP PIs:  
have Research  
Payments with  
PIs? - enter your  
PI Information

## PRINCIPAL INVESTIGATOR (PI) INFORMATION

Your organization may have one or more Principal Investigators (PIs) associated with a Research type payment. Similar to Products, SunshineSpend does not require all the Principal Investigator information to be specified with each payment. Instead, you set up Principal Investigators separately and simply specify which, if any, PIs

are associated with a payment using a system generated nickname.

To accommodate the scenario where you do not know all the specifics (full names, address, NPIs, specialty, license information, etc.) regarding a PI (HCPs and Practitioners) - SunshineSpend makes looking them up very easy.

#### Add PI Information - PI Lookup

##### FOR BEST SEARCH RESULTS:

- A partial entry is better than a full (but inaccurate) entry (Ex: enter "Albu" if you're not certain of the correct spelling of "Albuquerque")
- Enter ONLY the info which you know with certainty (Ex: enter "Mat" if you're not certain that it's "Mathew" or "Matthew")

**NPI** - Try first searching with only the NPI if you have it - otherwise, enter the first few numbers you know with certainty (if you have them)

National Provider Identifier (NPI)

**LAST NAME** - Enter the last name, OR, the first few characters (which you know with certainty)

Recipient's Last Name

**FIRST NAME** - Enter the first name, OR, the first initial, OR, the first few characters (which you know with certainty)

Recipient's First Name - NOTE: first names may not be the same as registered names.

**CITY** - Enter the city, OR, the first few characters (which you know with certainty):

Recipient's City

**STATE** - Select the State (if you know with certainty):

Recipient's State

*"DO IT SOON!"*  
save time  
remediating  
General Payments  
- configure  
Automation Options

## AUTOMATION OPTIONS

SunshineSpend highly recommends setting one or more of the Automation Options. These values are applied to all EzAdd, uploaded (imported), and incrementally added payments. Specify values for Automation Options that apply to the vast majority of your organizations payments - doing so will save remediation time. Of course, these default values can always be overridden as part of the remediation process.

#### Automation Options

The following options apply to ALL 'General Payments' that are imported or manually added:

**Form of Payment:** -- No Value Specified --

**Payment Category:** -- No Value Specified --

**Number of Payments:** ☐ Default to '1'

**Physician Ownership Indicator:** ☐ Default to 'No' (not applicable to Teaching Hospital-type General Payments)

**3rd Party Payment Indicator:** ☐ Default to 'No Third Party Payment'

**Publication Delay Request:** ☐ Default to 'No Delay Requested'