

# Quick Reference Guide: Updating or Adding Owner Information

## Steps:

- 1** *\*If your organization is enrolled as a Medicare provider, the ownership that is disclosed to Ohio Medicaid must match what was disclosed with Medicare for all individuals and/or organizations that own 5% or more of the organization.*

Reg ID	Provider	Status	Provider Type	NPI	Medicaid ID	Specialty	DD Contract Number	DD Facility Number	Location	Effective Date	Submit Date	Revalidation Due Date
517946	Training Medical Group	Complete	21 - Professional Medical Group	1245585009	9999876	Professional Medical Group				02/09/22	02/09/23	02/09/27

Editing or adding owner information for a provider enrolled in Medicaid is completed by initiating and finalizing an update to the group/organization/agency's Medicaid record. Locate the record on your dashboard in PNM and click on the Reg ID.

*This process can be completed by the Administrator for the group/organization/agency's Medicaid ID or a user with the Agent role, if that Agent has been assigned the 'Enrollment Agent' action by the Administrator.*

## 2

Under the Manage Application section, click the '+' icon to expand the Enrollment Action Selections.

Click on the hyperlink which says "Begin ODM Enrollment Profile Update."

*\*If you have previously initiated an update, but have not submitted the update, this link will appear as "Continue ODM Enrollment Profile Update."*

### Manage Application

#### Enrollment Actions

+ Enrollment Action Selections:

#### Programs

+ Program Selections:

#### Self Service

+ Self Service Selections:

#### Enrollment Actions

- Enrollment Action Selections:


[Begin ODM Enrollment Profile Update](#)  
[Edit Key Provider Identifiers](#)  
[Request Disenrollment](#)

## 3

From the list of updates, locate 'Owner Information' under the Owner Information section.

Click **Update** next to Owner Information.

Owner Information



**Update** Owner Information

#### - Enrollment Action Selections:

[Continue ODM Enrollment Profile Update](#)  
[Cancel Update Registration](#)  
[Edit Key Provider Identifiers](#)

*If you initiate an update in error, select "Cancel Update Registration" under Enrollment Actions to end the update process.*

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## Steps:

- 4** *If adding a owner information, proceed to Step 6.*  
Expand the Owner, Managing Employee and Controlling Interest Information section by clicking the '+' icon.

**+ Owner, Managing Employee and Controlling Interest Information**

To update an existing owner's information, click on the 'pencil and paper' icon for the owner you wish to edit.

### - Owner, Managing Employee and Controlling Interest Information

Type	Name	Title	Percentage	Start Date	End Date		
Organization	Training Group LLC		100.00	02/09/2022	12/31/2299		

**Add New** 

- 5** Edit the owner's information, percentage of ownership, or enter an end date for the owner, if they no longer have ownership.

Once information is updated, click **Save** on the Owner Information pop-up window.

To save the Owner Information page, with the new information, click **Save** at the top of the page.

**Save**

**Cancel**

Owner Information

Owner Type\* Organization

Owner Title

Affiliation Type\* ORGANIZATION - DIRECT OWNER

Organization Name\* Training Group LLC

Address 1\* 2400 Corporate Exchange Drive

Address 2

City\* Columbus

State\* Ohio

County

Zip\* 43231

Tax ID\* 574769694

Percentage of Ownership\* 100

Owner Effective Date\* 2/9/2022

Owner End Date 12/31/2299

**Save** **Cancel**


- 6** *\*If you completed Steps 4 & 5, and are not adding an owner, proceed to Step 8.*


Expand the Owner, Managing Employee and Controlling Interest Information section by clicking the '+' icon.

**+ Owner, Managing Employee and Controlling Interest Information**

To add a new owner, click **Add New**.

### - Owner, Managing Employee and Controlling Interest Information

Type	Name	Title	Percentage	Start Date	End Date		
Organization	Training Group LLC		100.00	02/09/2022	12/31/2299		

**Add New** 

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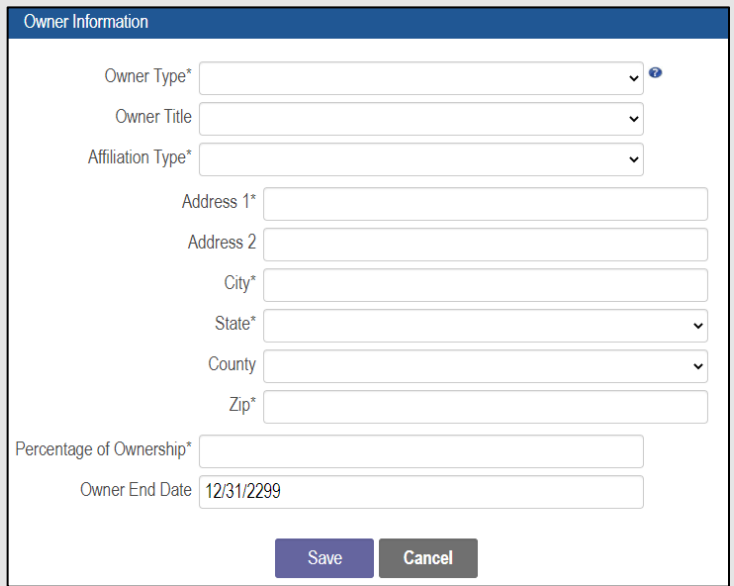
## Steps:

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Enter the owner's information, including the Owner Type, Affiliation Type, Address, and Percentage of Ownership.

Once information is entered, click **Save**.

To save the Owner Information page, with the new information, click **Save** at the top of the page.

A screenshot of the 'Owner Information' form. It includes fields for Owner Type\*, Owner Title, Affiliation Type\*, Address 1\*, Address 2, City\*, State\*, County, Zip\*, Percentage of Ownership\*, and Owner End Date (12/31/2299). At the bottom are 'Save' and 'Cancel' buttons.





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A red dot indicates that changed information has been saved on the page.

A red X only appears for owners added during this update. Any previously added owners cannot be deleted.

- Owner, Managing Employee and Controlling Interest Information

Type	Name	Title	Percentage	Start Date	End Date		
Organization	Training Group LLC		50.00	02/09/2022	12/31/2299		
Organization	Training Ownership Enterprises		50.00	04/14/2023	12/31/2299		

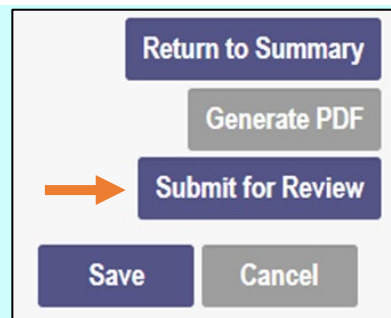
[Add New](#) 

Ensure the edits or additions to the owner information appear correctly on the table.

Click X to remove an added owner.

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To complete the update process (and the changes to the owner information), click **Submit for Review**.



A submission confirmation message displays indicating that the update has been submitted.

Click **Return to Home Page**, to go to your dashboard.

