

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. Updating the ownership is done within the Provider Network Management (PNM) System and can be completed by the Provider Administrator or Power Agent for the group/organization/agency's Medicaid ID or a user with the Provider Agent role, if that Agent has been assigned the 'Enrollment Agent' action by the Administrator/Power Agent.*

Reg ID	Provider	Status	Provider Type	NPI	Medicaid ID	Specialty	DD Contract Number	DD Facility Number	Location	Effective Date	Submit Date	Revalidation Due Date
		All				All						
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.**

1.1

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](#)

1.2

From the list of updates, locate 'Owner Information' and 'Global Ownership Update by Tax ID' under the Owner Information section.

Click the correct **Update** button for the owner update you wish to make.



Owner Information	Update	Owner Information
	Update	Global Ownership Update by Tax ID

For standard updates, proceed to step 2.
For global ownership updates, proceed to step 7.

Quick Reference Guide: Updating or Adding Owner Information

Steps:

2

If adding owner information, proceed to Step 4.

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 

3

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

4

*If you completed Steps 2 & 3, and are not adding an owner, proceed to Step 5.1.

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 

Quick Reference Guide: Updating or Adding Owner Information

Steps:

5

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.

Save

Cancel

Owner Information

Owner Type*

Owner Title

Affiliation Type*

Address 1*

Address 2

City*

State*

County

Zip*

Percentage of Ownership*

Owner End Date 12/31/2299

Save

Cancel

5.1

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

- 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



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.

6

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

Submission Confirmation

You have successfully submitted your application to the Medicaid Program.
Please allow at least 10 days for processing before attempting to submit any changes.

[Return to Home Page](#)

Return to Summary

Generate PDF

Submit for Review

Save

Cancel

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

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

Quick Reference Guide: Updating or Adding Owner Information

Steps:

7

Non-individual providers who have multiple active Medicaid IDs for the same Tax ID will see the Global Ownership Update by Tax ID.

The screenshot shows the Ohio Department of Medicaid Provider Network Management interface. At the top, there's a navigation bar with links like 'Provider Network Management', 'Medicaid Home', 'Learning', 'Contact', and 'Fee Schedule'. Below this, a summary card displays provider details: Evergreen Counseling LLC, Professional Medical Group, Standard application, Not Submitted, and ACTIVE status. A 'Provider Update' section prompts the user to click the 'Update' button. The main content area is titled 'Global Ownership Update by Tax ID' and includes a sub-header: 'This page allows ownership update for owners under the same Tax ID number'.

Click **Update** next to Global Ownership Update by Tax ID.

8

There will be a list of all active Medicaid IDs and Provider names associated with the provider's Tax ID with a checkbox to indicate which Med ID(s) the user wants to update with this ownership change.

The screenshot shows the 'Global Ownership Update by Tax ID' page. At the top, there's a navigation bar with icons for 'formation*', 'Global Ownership Update by Tax ID', 'Required Documents*', 'Agreements*', and 'NPI and Med ID'. Below this, a section titled 'Global Ownership Update by Tax ID' includes a note: 'This is not a required section. To skip this section click on Next button.' and a sub-header: 'This page allows ownership updates for owners under the same TAX ID number'. The main content area displays 'Medicaid IDs associated with this Tax ID:' followed by a list of IDs with checkboxes: 'Select All', '123456', and '7890'. A prompt 'Please select Med IDs to be updated' is visible.

9

The same sections currently listed on the Owner Information page will also be listed on the Global Ownership Update page:

- Instructions
- Definitions & Requirements
- Owner, Managing Employee and Controlling Interest Information
- Real Estate Owners
- Additional Disclosure
- Questions

The **questions section will have to be completed every time there's a global update.*

Once updates have been made, click **Confirm** and ownership information will globally update all Medicaid IDs selected for update, upon approval.

The screenshot shows the 'Global Ownership Update' page with a 'Results: 123456' header and a 'Generate PDF' button. Below this, there's a 'Previous' and 'Next' button. The main content area is titled 'Owner Information, Managing Employee and Controlling Interest Information' and contains a table with columns: Owner Name, Owner Type, Owner Title, Start Date, End Date, and Update. The table lists several owners, including Kristin Gillespie, Michelle Mendoza, Shalanda Jackson, Sue Bradley, Howard Lange, Gary Bishop, and Christy Hughes. Below the table, there are sections for 'Real Estate Owners', 'Additional Disclosure', and 'Questions'.

By saving and submitting this page, ownership information will globally update all Medicaid IDs selected for update

Confirm

Cancel