

MAINTAIN OWNERS/OFFICERS

Introduction	This section describes how to view, add, and modify owner/officer information, and view ownership history.
Helpful Hints	<ul style="list-style-type: none"> The combined ownership percentage of all owners on the account cannot exceed 100%. It is not possible to add a second owner/officer when the business type is sole proprietorship. The owner can be an individual owner or a legally formed entity. Information on up to five owners can be added to an account.

Viewing Owner/Officer Information

1. Log in to QUEST and click **Account Maintenance**.
2. Click the **Maintain Owner/Officers** link.

The screenshot shows the QUEST interface for an employer. The top right corner displays the date "Thursday, July 14, 2011" and a "Print Preview" link. The main navigation bar includes "Change Password" and "Logoff". The left sidebar contains a menu with "Employer Home" at the top, followed by "FAQ", "Workflow - My Inbox", and "Account Maintenance". Under "Account Maintenance", the "Maintain Owners/Officers" link is circled in red. Other links in the sidebar include "View Employer Account Profile", "Address Information", "Employer Appeals", "Maintain Employer Name", "Maintain Owners/Officers", "Maintain Employer Reporting Units", "Request Worker Status Determination", "Voluntary Contribution", "Third Party Administrator (TPA) Authorization", "Benefit Charge Activities", "Correspondence", and "Employment and Wage Detail Reporting". The main content area is titled "Employer Information" and shows "Employer Account Number" and "Employer Name" with redacted values. Below this is the "Account Maintenance" section with links for "View Employer Account Profile", "Address Information", "Employer Appeals", "Maintain Employer Name", "Maintain Employer Reporting Units", and "Voluntary Contribution".

3. The **Owner/Officer Information** page appears.

The screenshot shows the QUEST interface for an employer. The top right corner displays the date "Tuesday, July 12, 2011" and a "Print Preview" link. The main navigation bar includes "Change Password" and "Logoff". The left sidebar contains a menu with "Employer Home" at the top, followed by "FAQ", "Workflow - My Inbox", and "Account Maintenance". Under "Account Maintenance", the "Maintain Owners/Officers" link is highlighted. Other links in the sidebar include "View Employer Account Profile", "Address Information", "Employer Appeals", "Maintain Employer Name", "Maintain Owners/Officers", "Maintain Employer Reporting Units", and "Request Worker Status Determination". The main content area is titled "Owner/Officer Information" and contains the text "Please select 'Update' to add or modify Owner/ Officer Information." Below this is a table with columns for "Title", "Name", "Address", "SSN/FEIN", and "Percentage of Ownership". The table contains one row with the following data: Title: Other, Name: [Redacted], Address: 19 Staniford St, Boston, MA 02114, SSN/FEIN: [Redacted], Percentage of Ownership: 100.00%. Below the table is a "Link to Previous Owner/Officers" link. At the bottom of the page, there is an "Update" button and a callout box pointing to it with the text "Click to modify Ownership information". Another callout box points to the "Link to Previous Owner/Officers" link with the text "Click to view Ownership History".

Updating Owner/Officer Information

1. Display the **Owner/Officer Information** page using the instructions in the previous section.
2. Click **Update**.
3. The **Review Owner/Officer** page appears. Add, modify, or inactivate Owner/Officer entries using the instructions below.

NOTE: Owner/Officer information that is being updated due to the purchase or sale of a business must be changed by following the steps in the section, *Provide Information on the Purchase or Sale of a Business*.

Review Owner/Officer Information

- To **ADD** an Owner/Officer, enter the information in the Add/Modify section below.
- To **MODIFY** existing information, identify the record by selecting the radio button to the left of the name and select "Modify".
- To **INACTIVATE** an entry, identify the record by selecting "Modify". Then enter the Effective End Date of Ownership.
- You may not enter more than 5 owner/officers.
- After completing all updates to the Owner/Officer information, click the "Update" button.

	Title	Name	SSN/FEIN	Company
<input checked="" type="radio"/>	Other	██████████	██████████	19 Staniford
				Total Percent

Radio button for existing Owner/Officer

To modify an existing Owner/Officer:
 Select the radio button for the Owner/Officer.
 Click Modify.
 Edit the fields in these sections:
 --Add Owner/Officer Information
 --Additional Information
 Click Save.

Add Owner/Officer information

- If the Owner/Officer is an individual, complete the individual Owner/Officer section and Additional Information section.
- If the Owner/Officer is a business/entity, complete the Business/Entity Owner/Officer section and Additional Information section.

Individual Owner/Officer	OR	Business/Entity Owner/Officer
First Name: <input style="width: 90%;" type="text"/>		Legal Entity Name: <input style="width: 90%;" type="text"/>
Middle Initial: <input style="width: 90%;" type="text"/>		FEIN: <input style="width: 90%;" type="text"/>
Last Name: <input style="width: 90%;" type="text"/>		
SSN: <input style="width: 90%;" type="text"/>		

To add a new Owner/Officer:
 Fill in fields in these sections:
 --Add Owner/Officer Information
 --Additional Information
 Click Add.

Additional Information

- The Additional Information section is required for both the Individual Owner/Officer and Business/Entity Owner/Officer.

Business Title: <input style="width: 90%;" type="text"/>	Select One
Percent of Ownership: <input style="width: 90%;" type="text"/>	
First Date of Ownership/Appointment: <input style="width: 90%;" type="text"/>	(mm/dd/yyyy)
Is the owner/officer compensated for their services?:	<input type="radio"/> Yes <input type="radio"/> No*
Address Line 1: <input style="width: 90%;" type="text"/>	*
Address Line 2: <input style="width: 90%;" type="text"/>	
City: <input style="width: 90%;" type="text"/>	*
State: <input style="width: 90%;" type="text"/>	MA - Massachusetts
Zip Code: <input style="width: 90%;" type="text"/>	
Country: <input style="width: 90%;" type="text"/>	US - United States Of America*
E-Mail: <input style="width: 90%;" type="text"/>	

- Select the "ADD" button to **SAVE** the entered Owner/Officer information.

When information is complete, click Submit

To Add an Owner/Officer:

1. Perform the steps in *Updating Owner/Officer Information*.
2. Enter the information into the fields in the **Add/Modify Owner/Officer Information** and **Additional Information** areas.
3. Click **Add** below the **Additional Information** area.
4. Repeat for each new Owner/Officer entry you want to add.

IMPORTANT NOTE: Information about an Owner/Officer in the **Add/Modify Owner/Officer Information** area should either go under **Individual Owner/Officer** (left column) or **Business Entity Owner/Officer** (right column). Do not put information in both columns.

To Modify Existing Owner/Officer Information:

1. Perform the steps in *Updating Owner/Officer Information*.
2. Select the radio button to the left of an entry.
3. Click **Modify**.
4. Edit the fields in the **Add/Modify Owner/Officer Information** and **Additional Information** areas.
5. Click **Save** below the **Additional Information** area.
6. Repeat for each existing Owner/Officer entry.

To Inactivate an Owner/Officer:

1. Perform the steps in *Updating Owner/Officer Information*.
2. Select the radio button to the left of that entry and click **Modify**.
3. Add a date to the Effective End Date of Ownership field.

Additional Information

- The Additional Information section is required for both the Individual Owner/Officer and the Business/Entity Owner/Officer.

Business Title:	Other *
Percent of Ownership:	20 *
First Date of Ownership/Appointment:	1/1/2011
Effective End Date of Ownership:	(mm/dd/yyyy)
Is the owner/officer compensated for their services?	<input type="radio"/> Yes <input checked="" type="radio"/> No *
Address Line 1:	19 Staniford St *
Address Line 2:	
City:	Boston *
State:	MA - Massachusetts
Zip Code:	02114
Country:	US - United States Of America *
Email:	

4. Click **Save**.

Viewing Owner/Officer History

1. Log in to QUEST and click **Account Maintenance**.
2. Click the **Maintain Owner/Officers** link.
3. Click **Link to Previous Owner/Officers**.

Employer Information				
Employer Account Number:	██████████	Employer Name:	██████████	
Owner/Officer Information				
Please select "Update" to add or modify Owner/ Officer Information.				
Title	Name	Address	SSN/FEIN	Percentage of Ownership
Other	██████████	19 Staniford St, Boston, MA 02114	██████████	100.00%
Link to Previous Owner/Officers				

4. The **Previous Owner/Officer Information** page appears. It is similar to the Owner/Officer Information page, but displays **Effective Begin Date** of Ownership and **Effective End Date** of Ownership.

Employer Information						
Employer Account Number:	██████████	Employer Name:	██████████			
Previous Owner/Officer Information						
Title	Name	Percentage of Ownership	SSN/FEIN	Address	Effective Begin Date of Ownership	Effective End Date of Ownership
Other	██████████	20.00%	██████████	19 Staniford St, Boston, MA 02114	1/1/2011	7/1/2011
Previous						