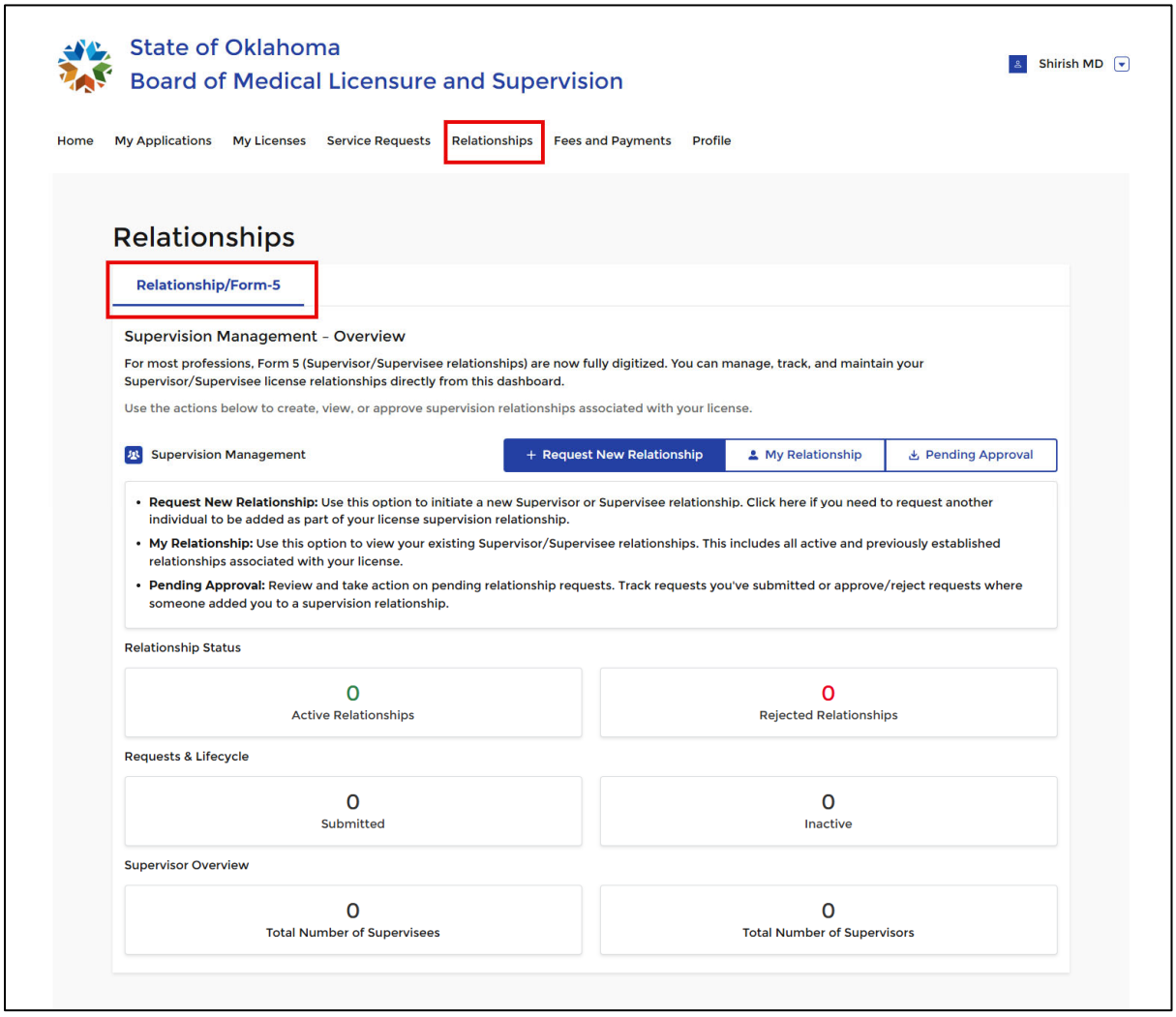
Form 5 / License Relationship Detailed Guide

Supervision Management – Overview

For most professions, **Form-5 (Supervisor/Supervisee relationships)** are now fully digitized. You can manage, track, and maintain your **Supervisor/Supervisee license relationships** directly from this dashboard.

Use the actions below to create, view, or approve supervision relationships associated with your license.



Button Instructions

+ Request New Relationship

Use this option to **initiate a new Supervisor or Supervisee relationship**.
Click here if you need to request another individual to be added as part of your license supervision relationship.

👤 My Relationship

Use this option to **view your existing Supervisor/Supervisee relationships**.
This includes all active and previously established relationships associated with your license.

⏳ Pending Approval

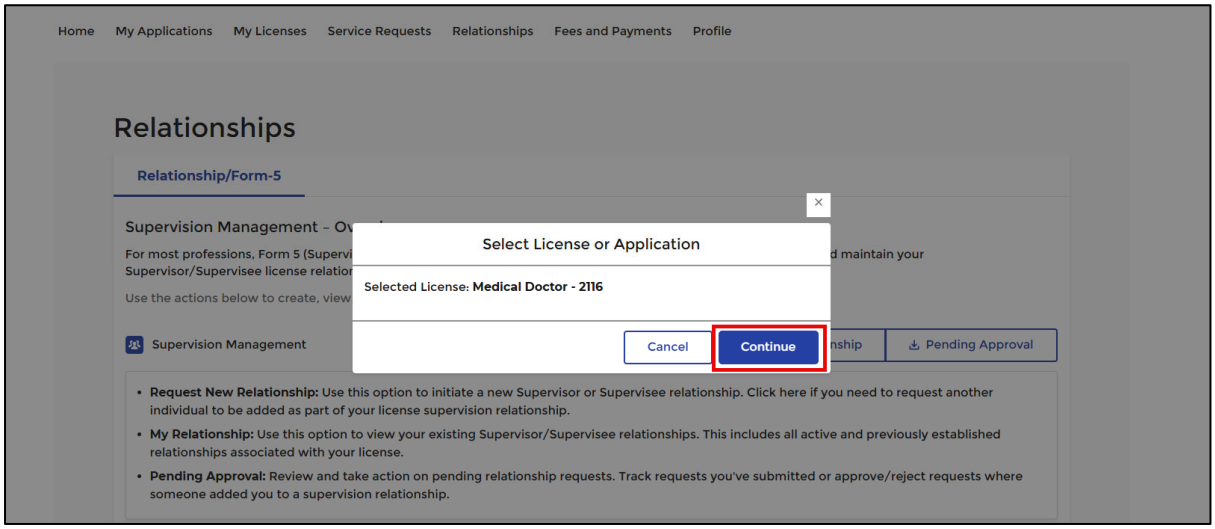
Use this option to **review and take action on pending relationship requests**.

- If **you submitted a request** and the other party has not yet accepted it, you can track its status here.
- If **someone added you** to a supervision relationship, you can review and approve or reject the request here.

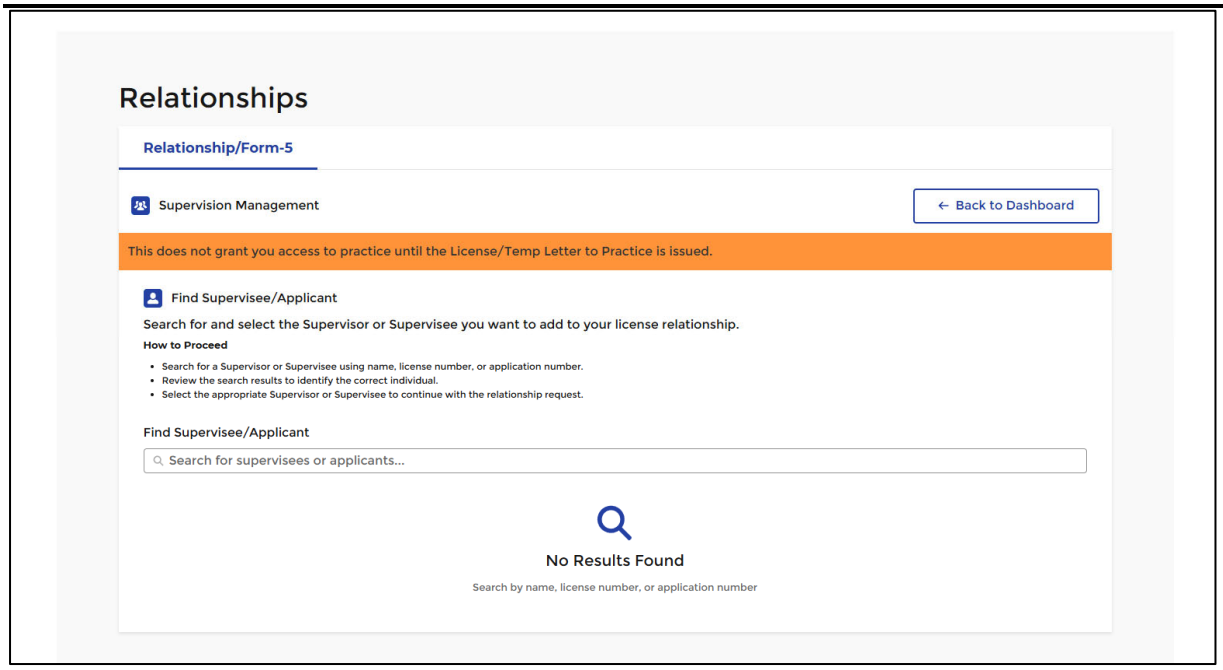
Request New Relationship

To begin, click **"Request New Relationship."** In this example, the user is logged in as an **MD professional**. After selecting this option, the system displays the user's **profession** and **license number**. If the user holds multiple licenses, the system allows them to select the license they want to use to proceed.

Click Continue

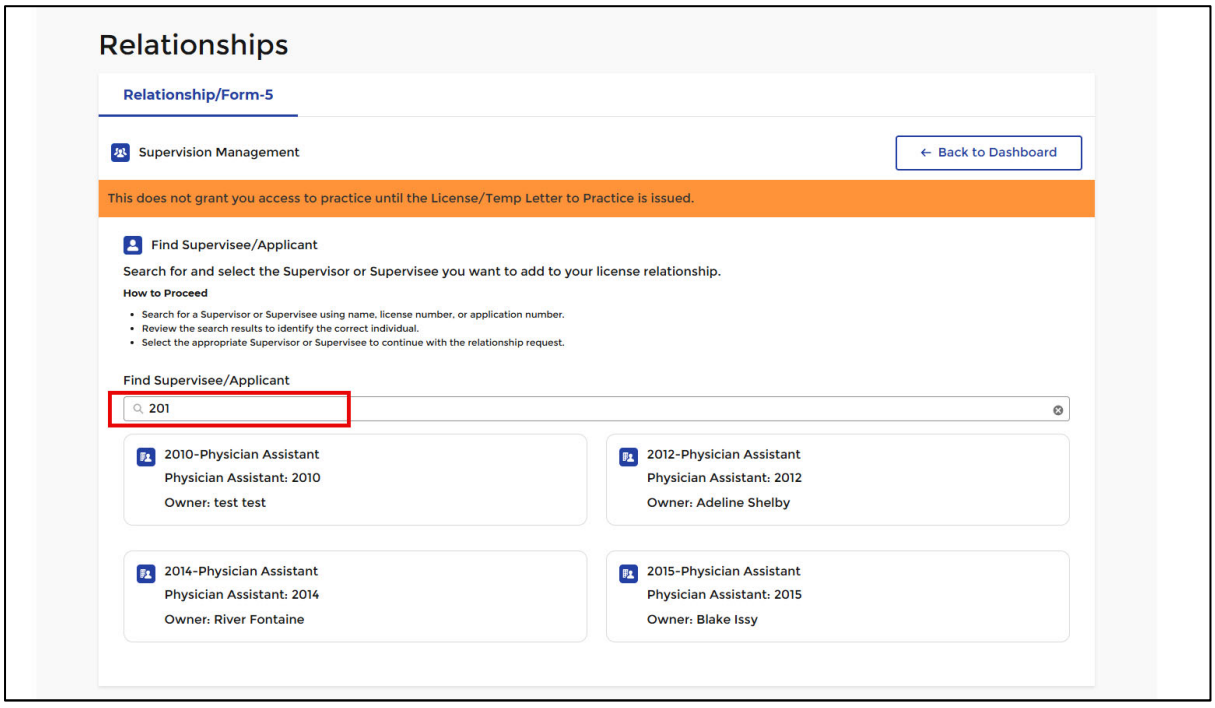


Search for a supervisee with an active license or a submitted application. Based on your role, you can search for either a supervisor or a supervisee accordingly.



How to Proceed

- Search for a Supervisee using name, license number, or application number.
- Review the search results to identify the correct individual.
- Select the appropriate Supervisee to continue with the relationship request

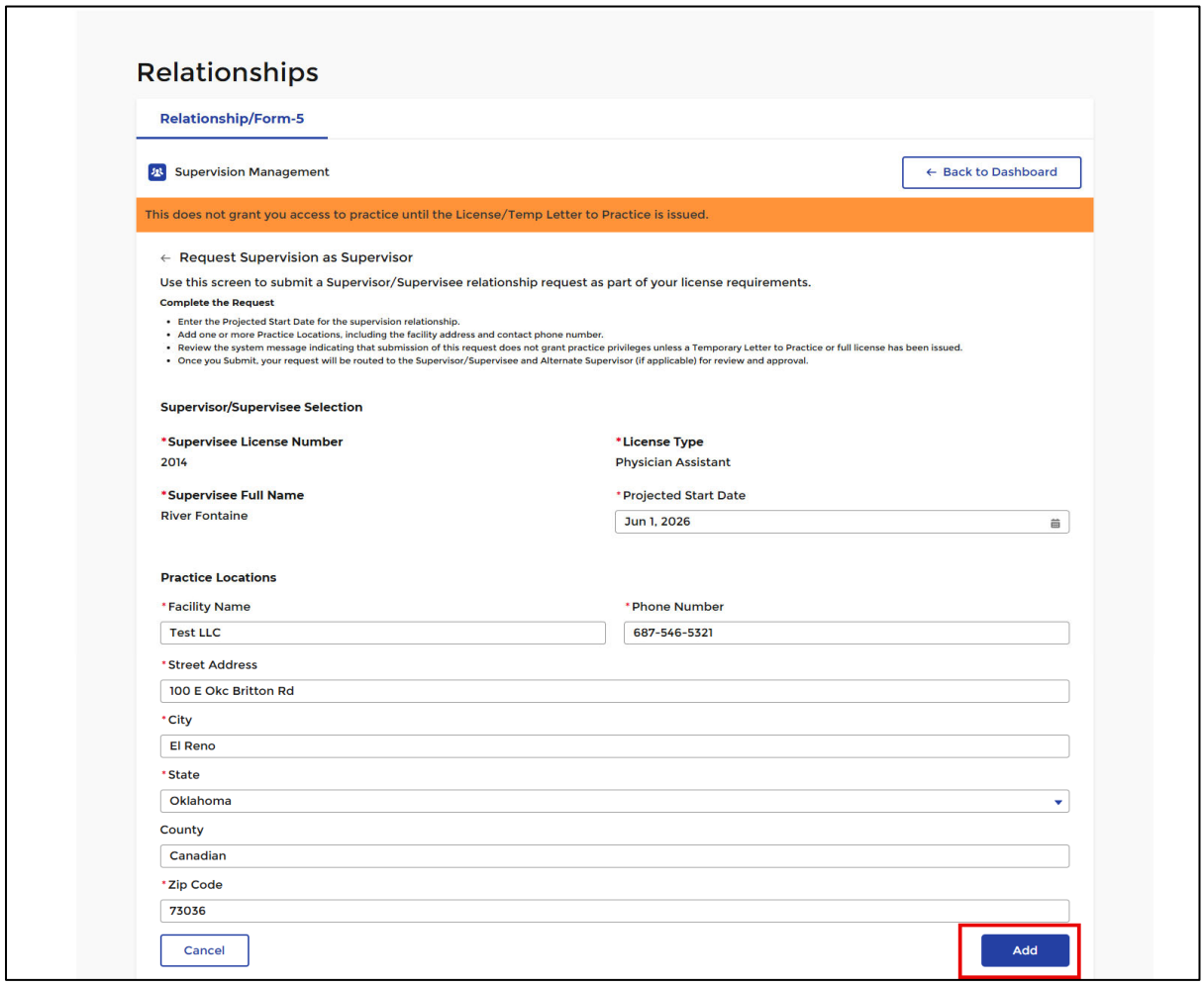


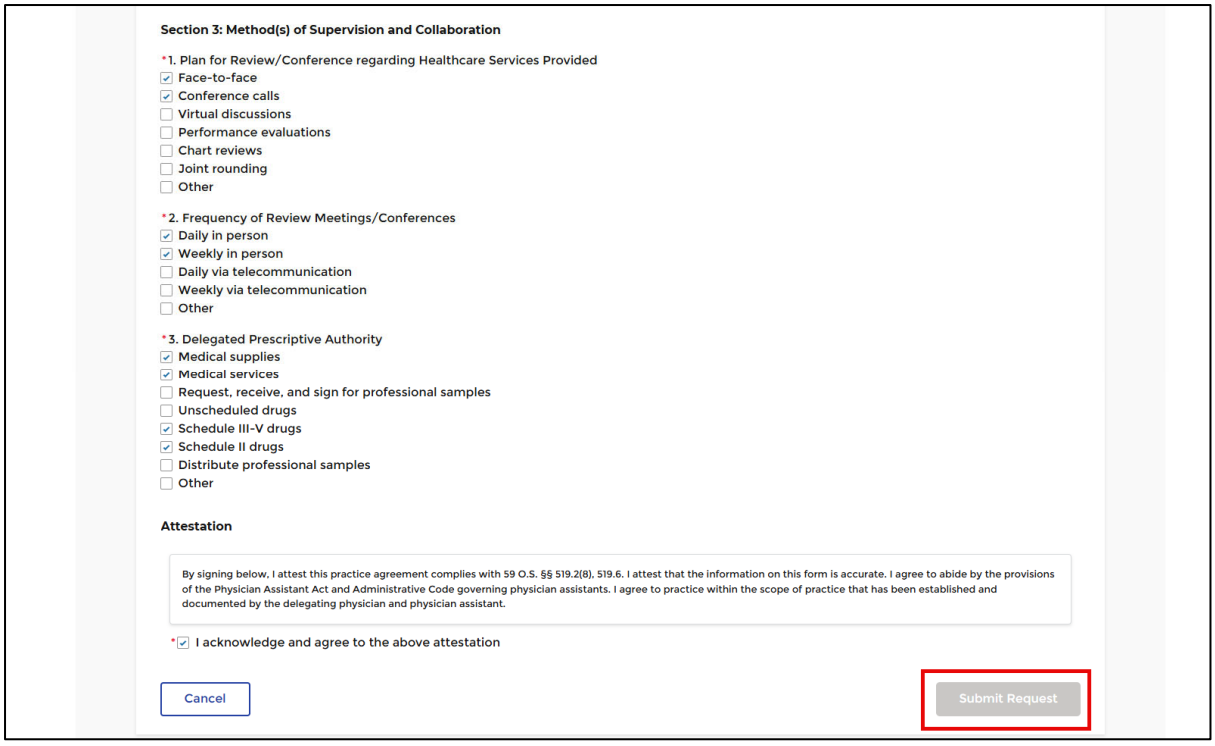
Enter Relationship Details

Use this screen to submit a **Supervisor/Supervisee relationship request** as part of your license requirements.

Complete the Request

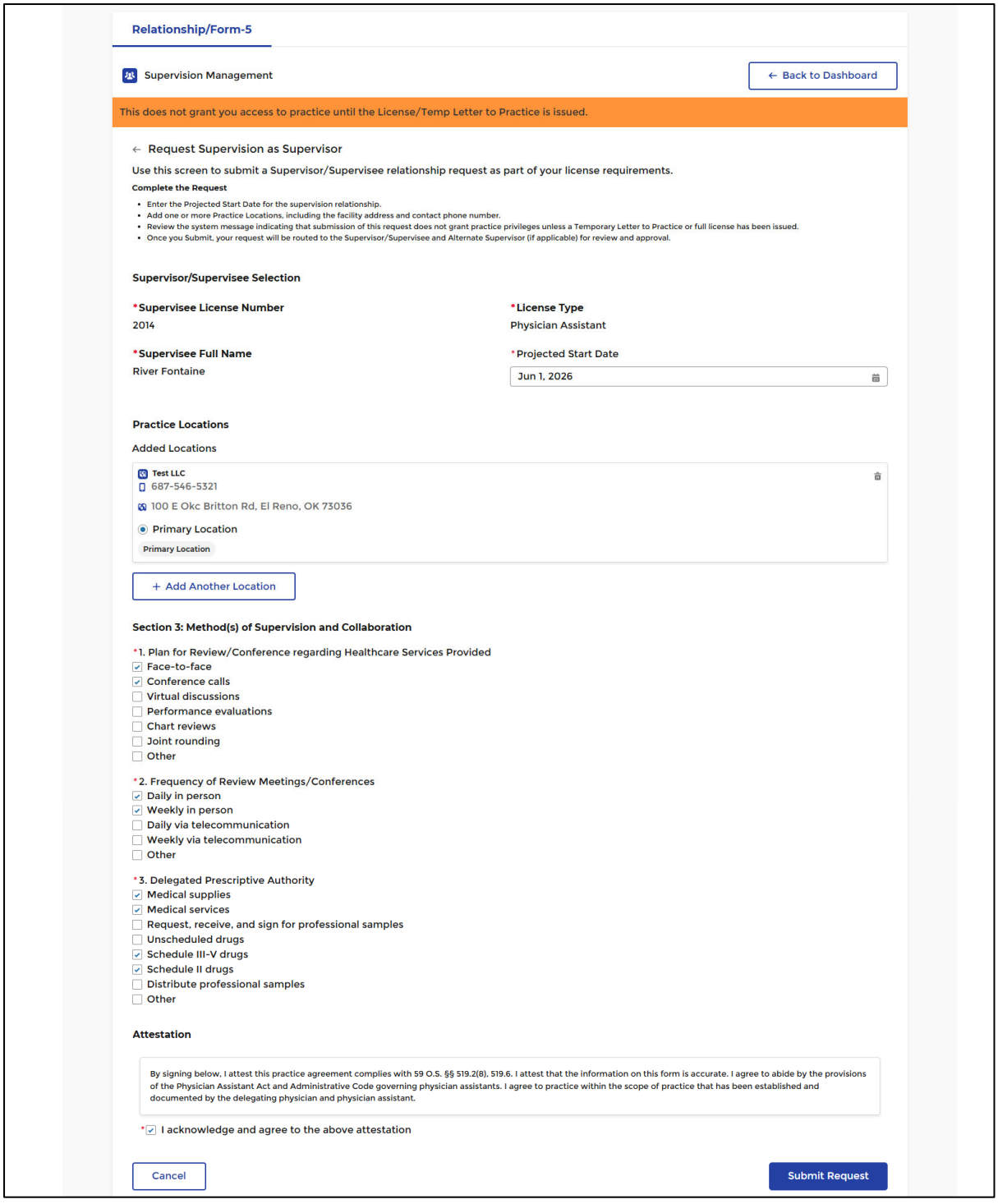
- **Enter the Projected Start Date** for the supervision relationship.
- **Add one or more Practice Locations**, including the facility address and contact phone number. Make sure you click Add for each address you want to include in this digital Form 5.
- **Review the system message** indicating that submission of this request **does not grant practice privileges** unless a Temporary Letter to Practice or full license has been issued.
- Populate all other required fields marked with a red asterisk.
- Once you Submit**,** your request will be **routed to the Supervisee** for review and approval.
    - **NOTE:** Based on your license type and role, the request will be sent to either the supervisor or supervisee. If you are permitted to have an alternate supervisor, you can add them, and the request will also be sent to them.



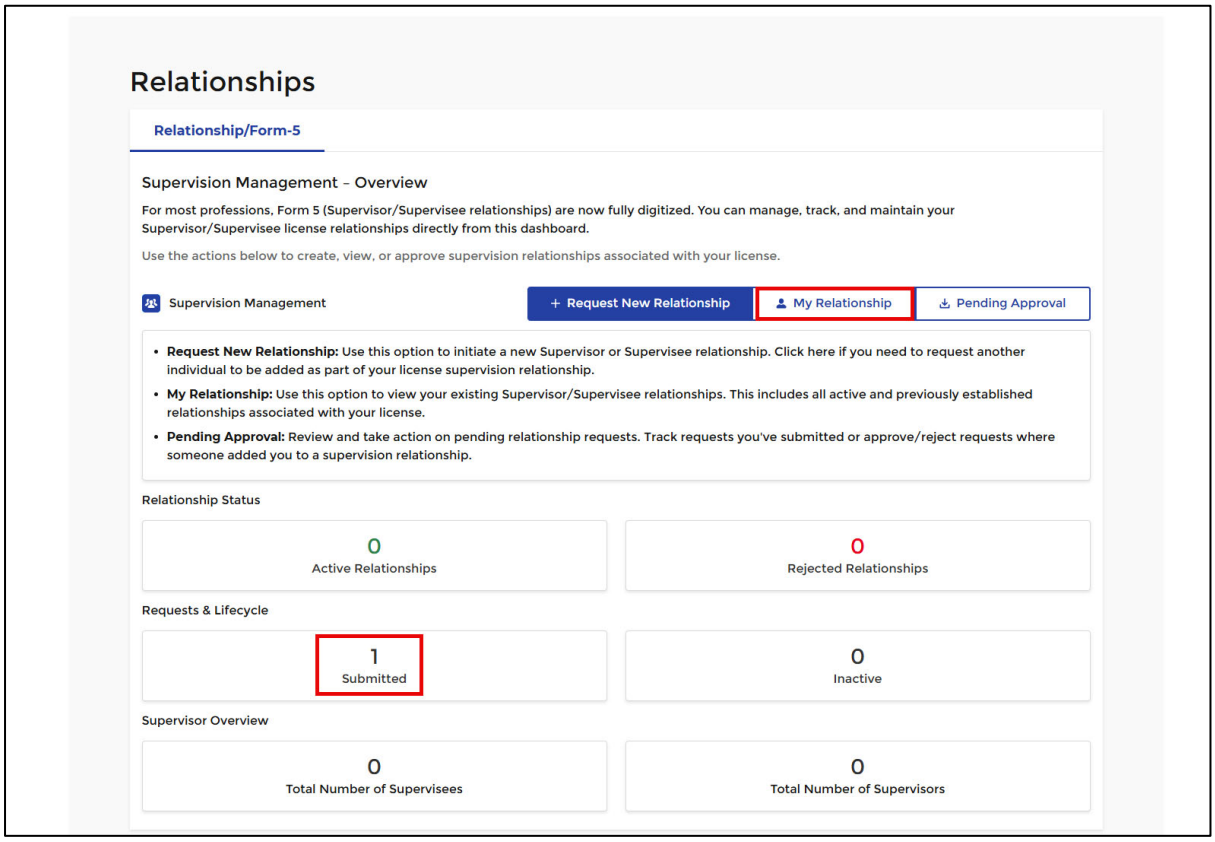


Submit Request

Once you add a location and other required fields, the screen will look like this, and “Submit Request” will be visible.

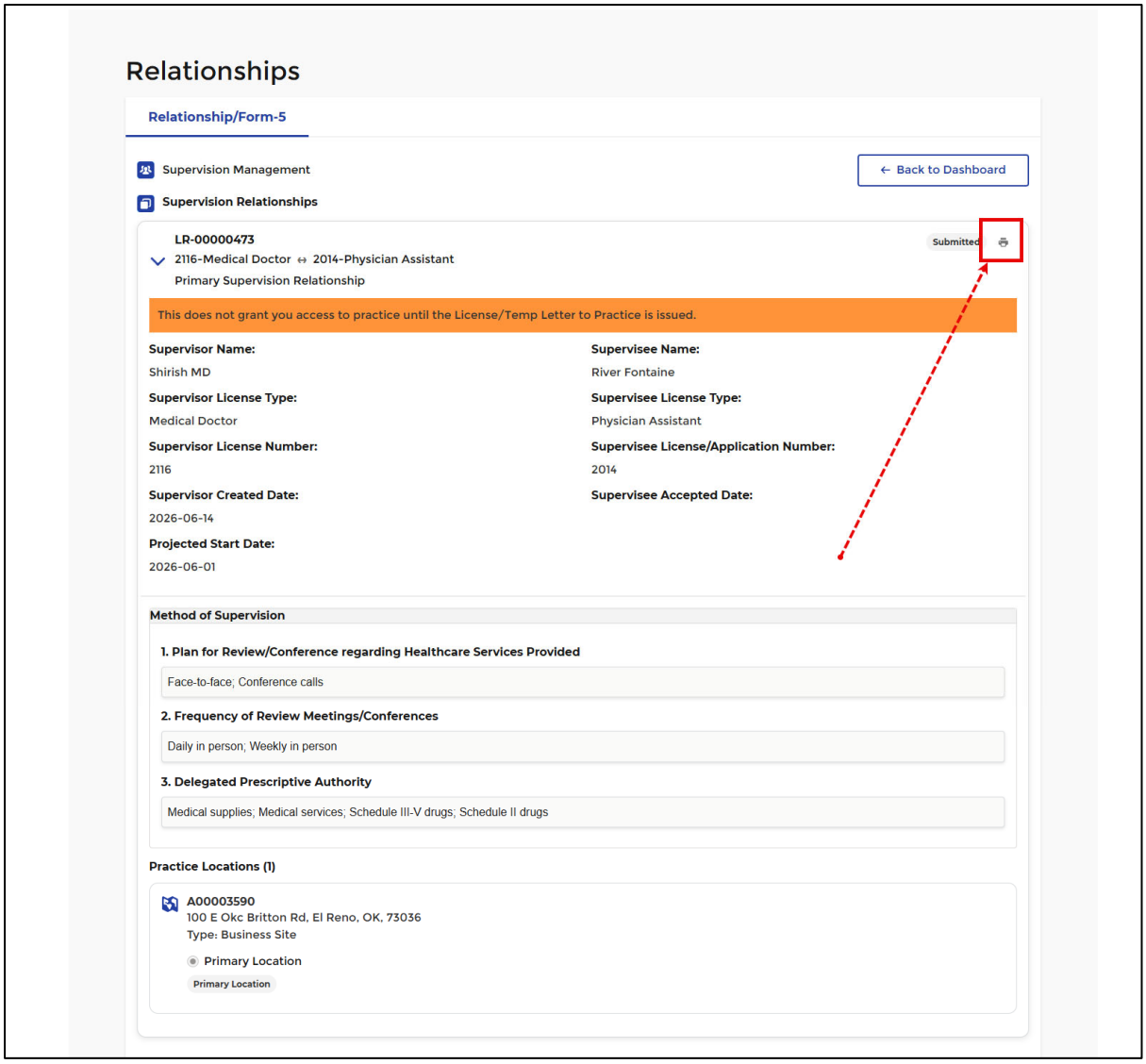

Relationship/Form-5
Supervision Management
← Back to Dashboard
This does not grant you access to practice until the License/Temp Letter to Practice is issued.
← Request Supervision as Supervisor
Use this screen to submit a Supervisor/Supervisee relationship request as part of your license requirements.
Complete the Request
• Enter the Projected Start Date for the supervision relationship.
• Add one or more Practice Locations, including the facility address and contact phone number.
• Review the system message indicating that submission of this request does not grant practice privileges unless a Temporary Letter to Practice or full license has been issued.
• Once you Submit, your request will be routed to the Supervisor/Supervisee and Alternate Supervisor (if applicable) for review and approval.
Supervisor/Supervisee Selection
*Supervisee License Number
2014
*License Type
Physician Assistant
*Supervisee Full Name
River Fontaine
*Projected Start Date
Jun 1, 2026
Practice Locations
Added Locations
Test LLC
687-546-5321
100 E Okc Britton Rd, El Reno, OK 73036
Primary Location
Primary Location
+ Add Another Location
Section 3: Method(s) of Supervision and Collaboration
*1. Plan for Review/Conference regarding Healthcare Services Provided
Face-to-face
Conference calls
Virtual discussions
Performance evaluations
Chart reviews
Joint rounding
Other
*2. Frequency of Review Meetings/Conferences
Daily in person
Weekly in person
Daily via telecommunication
Weekly via telecommunication
Other
*3. Delegated Prescriptive Authority
Medical supplies
Medical services
Request, receive, and sign for professional samples
Unscheduled drugs
Schedule III-V drugs
Schedule II drugs
Distribute professional samples
Other
Attestation
By signing below, I attest this practice agreement complies with 59 O.S. §§ 519.2(8), 519.6. I attest that the information on this form is accurate. I agree to abide by the provisions of the Physician Assistant Act and Administrative Code governing physician assistants. I agree to practice within the scope of practice that has been established and documented by the delegating physician and physician assistant.
*I acknowledge and agree to the above attestation
Cancel
Submit Request

Once you submit the request, it will appear on your dashboard in the Submitted section. If you click the My Relationship tab, you will also see the relationship record there.



From the displayed License Relationship, you can click Expand to see all the details. There is also a Print option if you need it.





Supervisee View

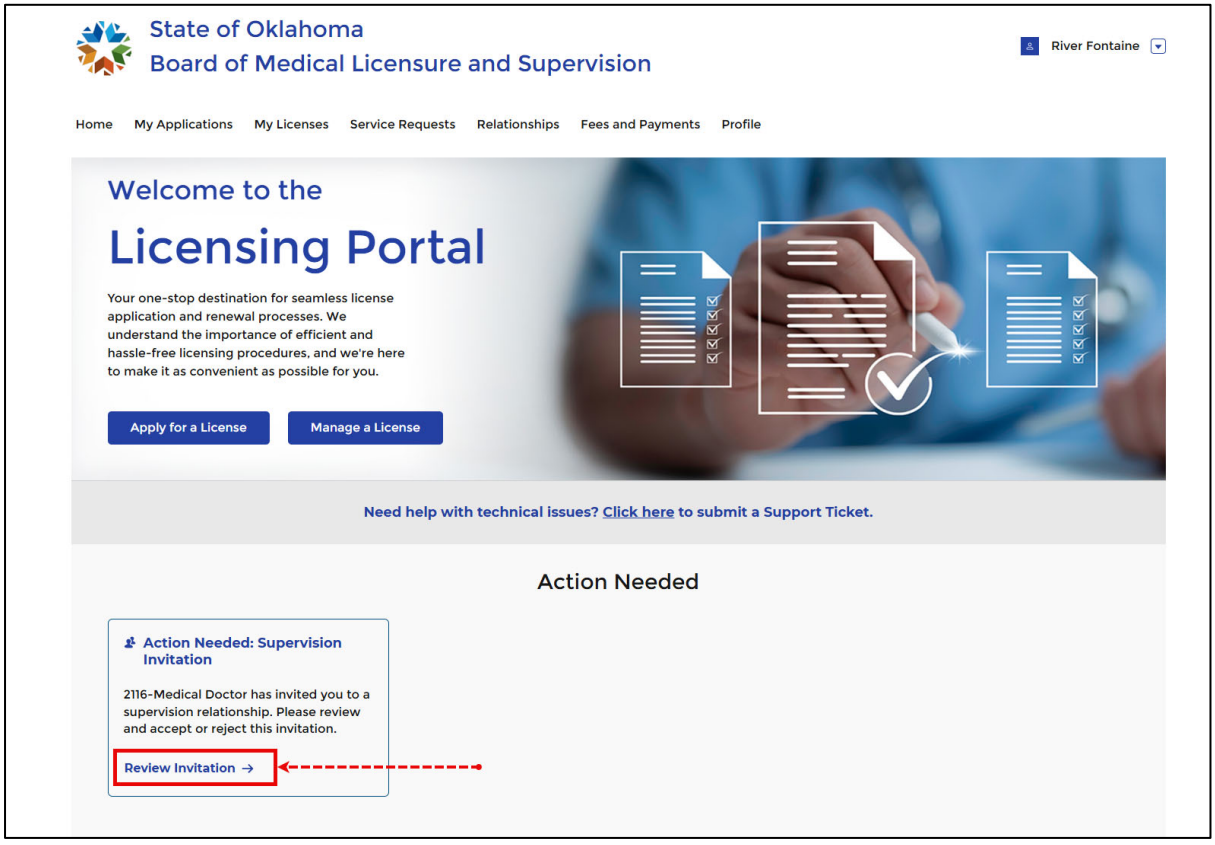
Now you'll see what the supervisee sees and how they can take action. First, they will receive an email stating that the supervisor has added them as a supervisee. The email includes a hyperlink that takes them to the dashboard, where they can either accept or deny the Form 5/relationship request.

Email

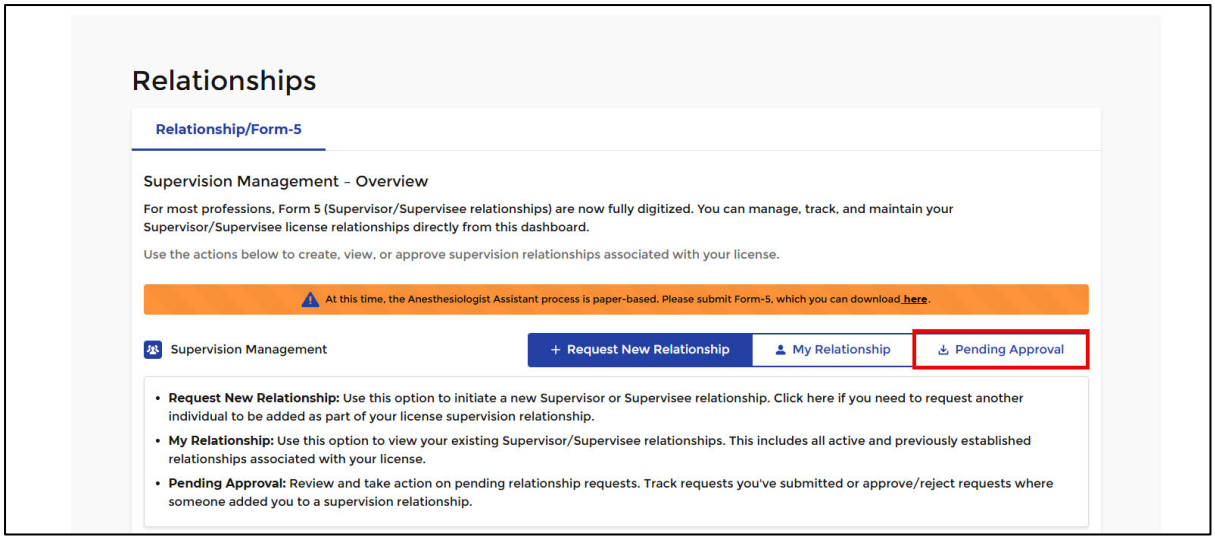


Supervisee -Dashboard

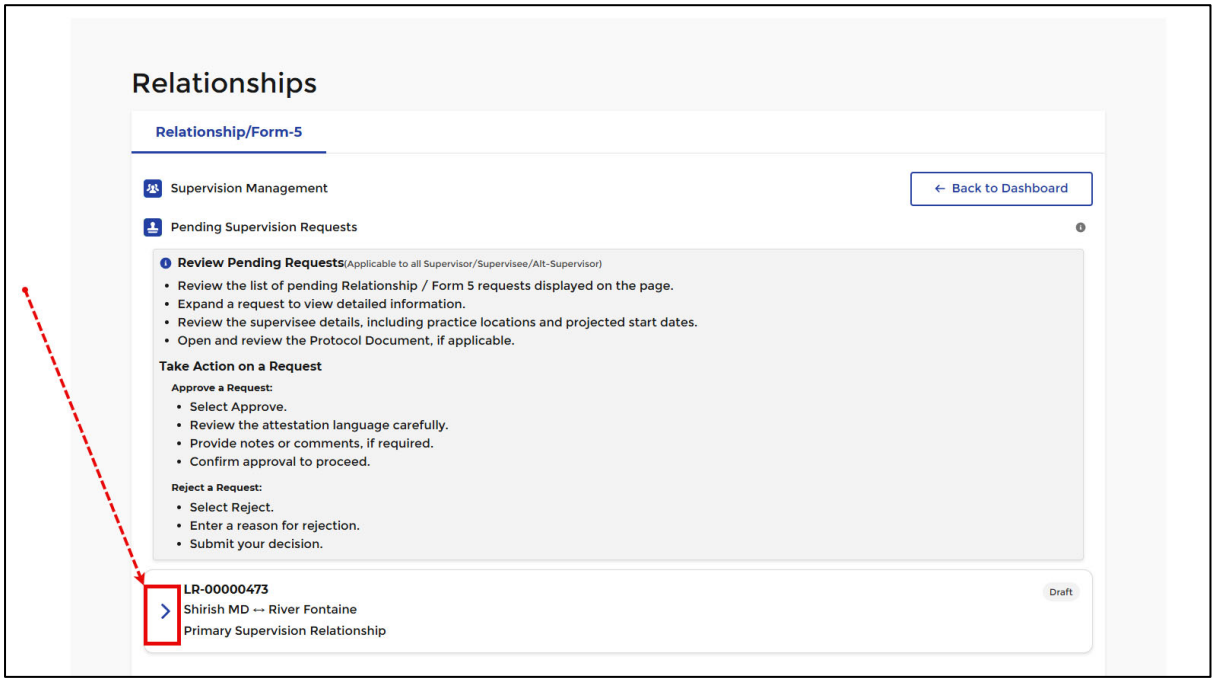
Once the supervisee logs in, they will see an Action Needed component indicating that a supervision invitation is pending and requires action.



Upon clicking, you will be taken to the Relationship/Form-5 Dashboard. Click Pending Approval, and you will see the request submitted by the supervisor.



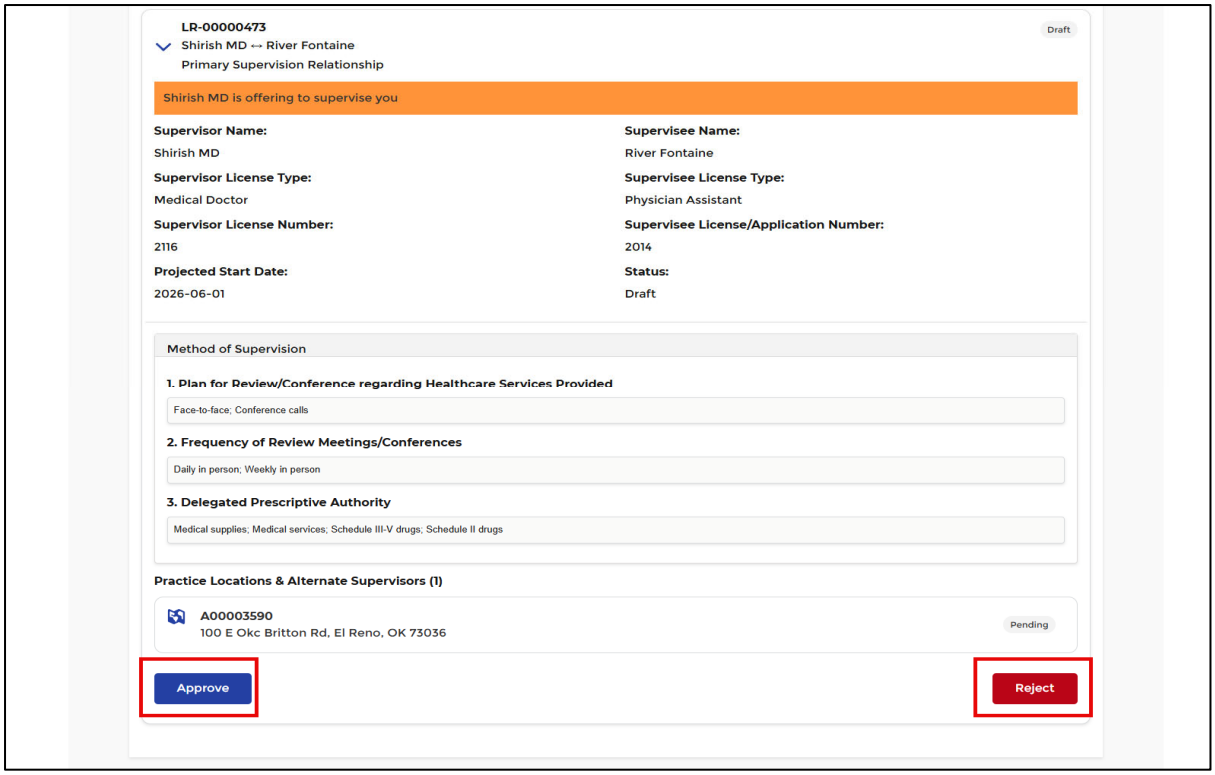
Click on to Expand

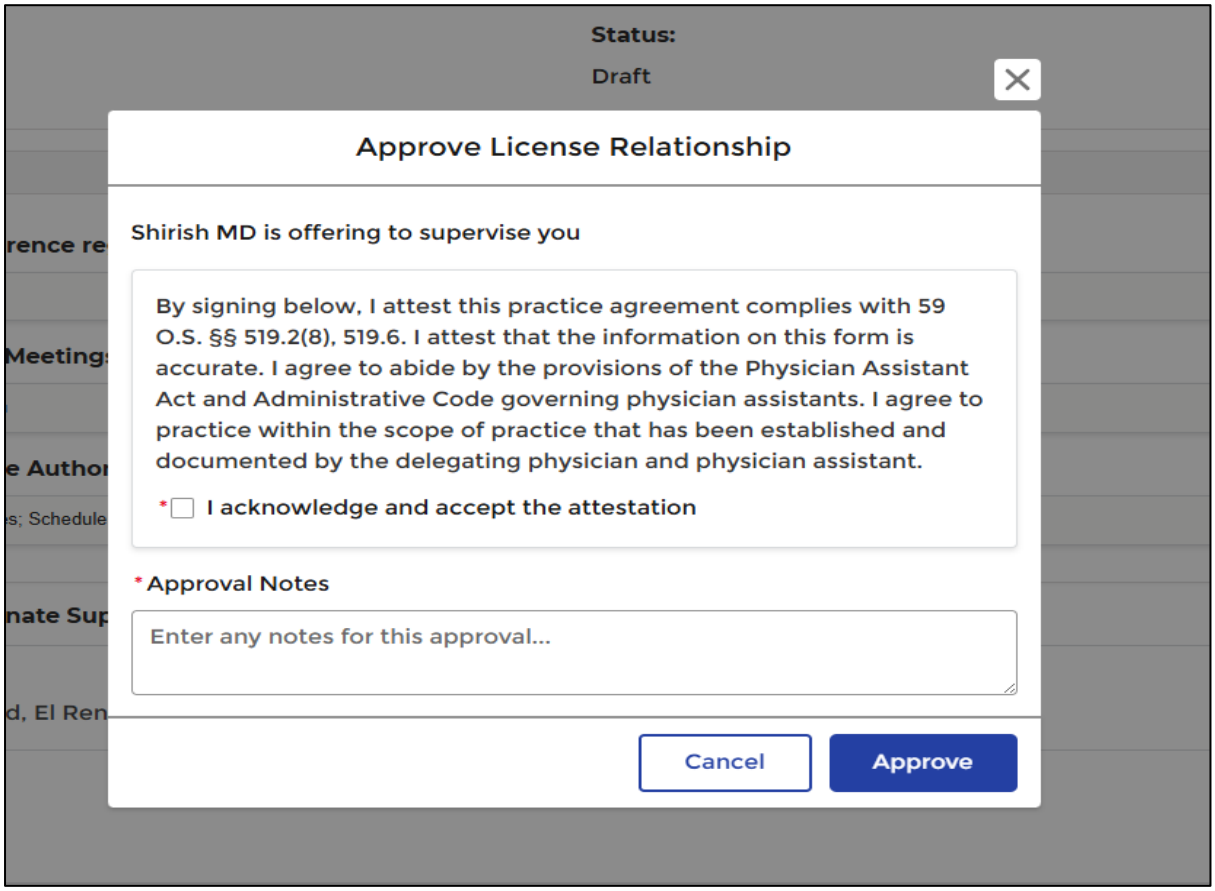


Take Action on a Request

Approve a Request

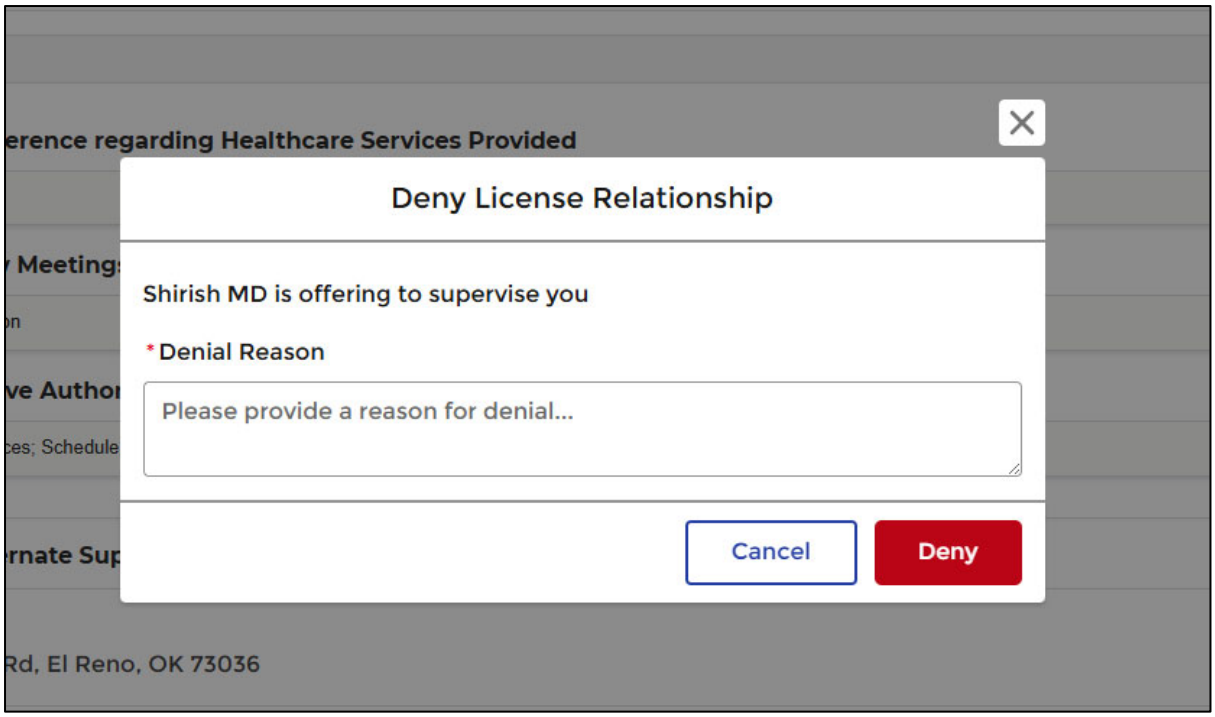
- Select **Approve**.
- Review the **attestation language** carefully.
- Provide **notes or comments**, if required.
- **Confirm approval** to proceed.


LR-00000473
Shirish MD ↔ River Fontaine
Primary Supervision Relationship
Draft
Shirish MD is offering to supervise you
Supervisor Name:
Shirish MD
Supervisee Name:
River Fontaine
Supervisor License Type:
Medical Doctor
Supervisee License Type:
Physician Assistant
Supervisor License Number:
2116
Supervisee License/Application Number:
2014
Projected Start Date:
2026-06-01
Status:
Draft
Method of Supervision
1. Plan for Review/Conference regarding Healthcare Services Provided
Face-to-face; Conference calls
2. Frequency of Review Meetings/Conferences
Daily in person; Weekly in person
3. Delegated Prescriptive Authority
Medical supplies; Medical services; Schedule III-V drugs; Schedule II drugs
Practice Locations & Alternate Supervisors (1)
A00003590
100 E Okc Britton Rd, El Reno, OK 73036
Pending
Approve
Reject


Status:
Draft
Approve License Relationship
Shirish MD is offering to supervise you
By signing below, I attest this practice agreement complies with 59 O.S. §§ 519.2(8), 519.6. I attest that the information on this form is accurate. I agree to abide by the provisions of the Physician Assistant Act and Administrative Code governing physician assistants. I agree to practice within the scope of practice that has been established and documented by the delegating physician and physician assistant.
* I acknowledge and accept the attestation
* Approval Notes
Enter any notes for this approval...
Cancel
Approve

Reject a Request

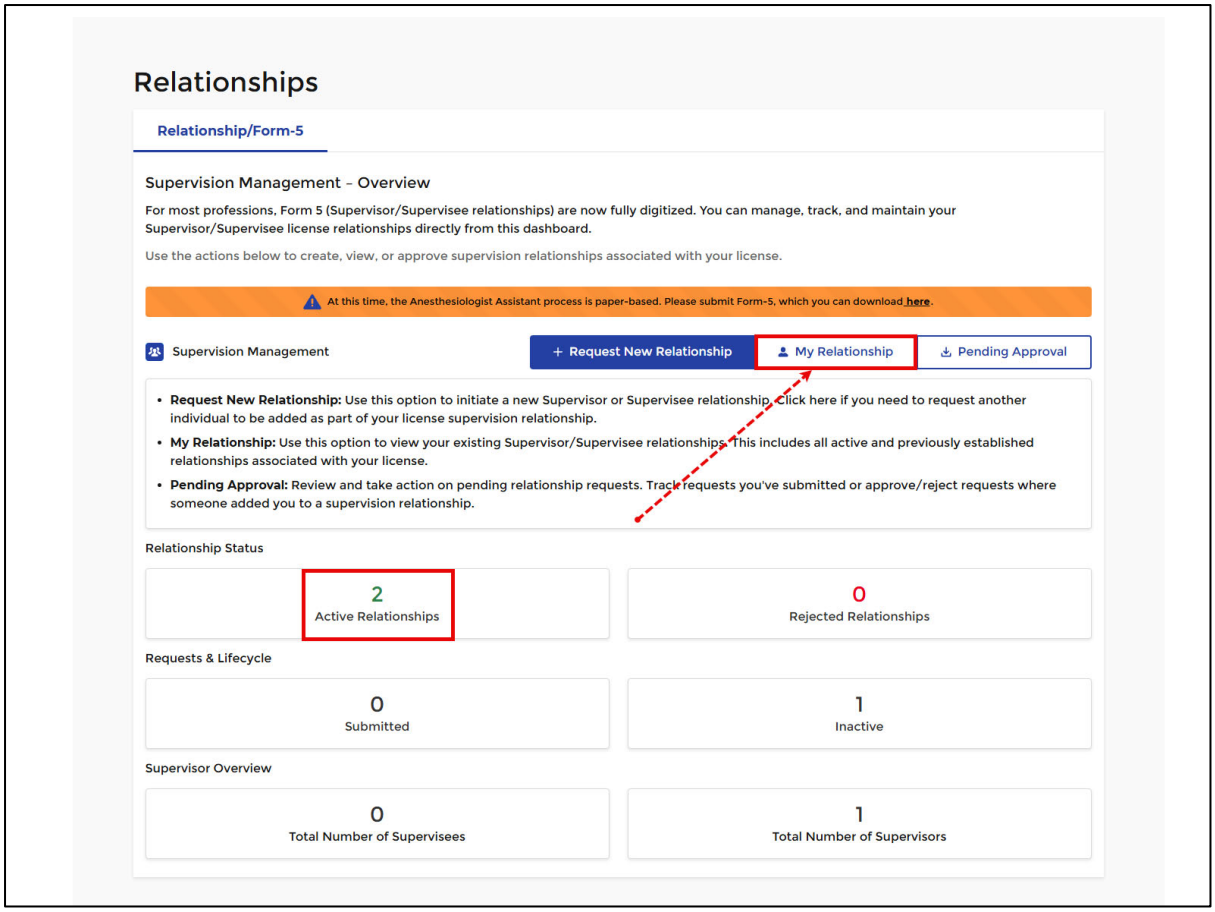
- Select **Reject**.
- Enter a **reason for rejection**.
- **Submit** your decision.



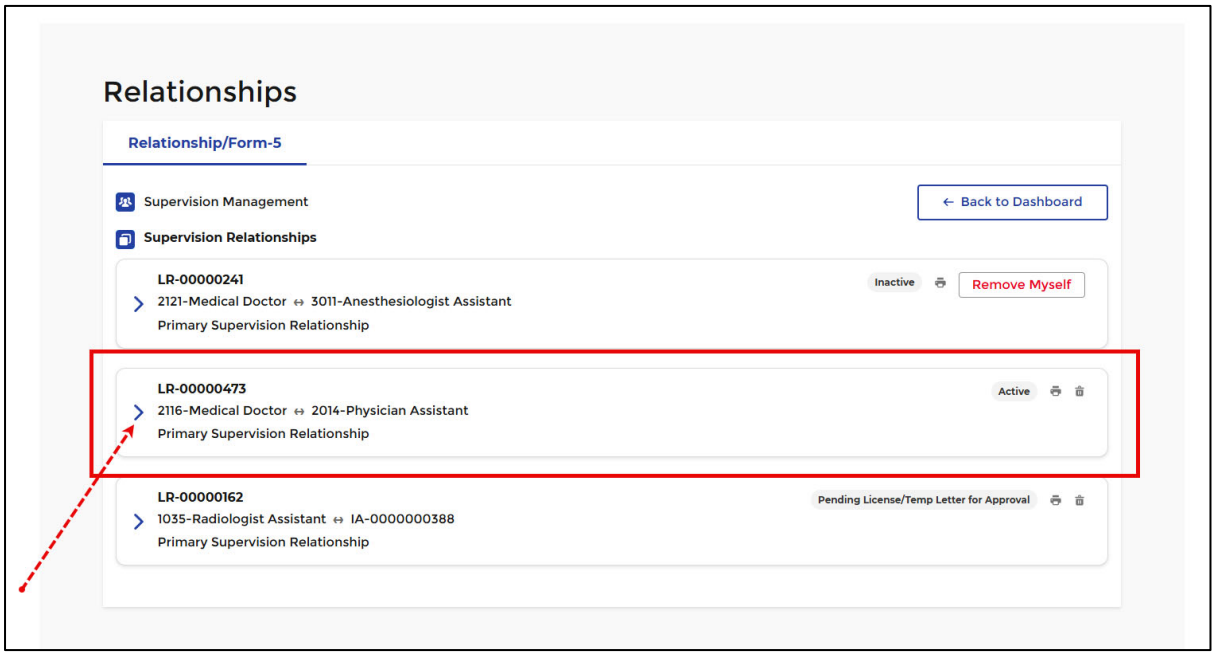
Review & Print

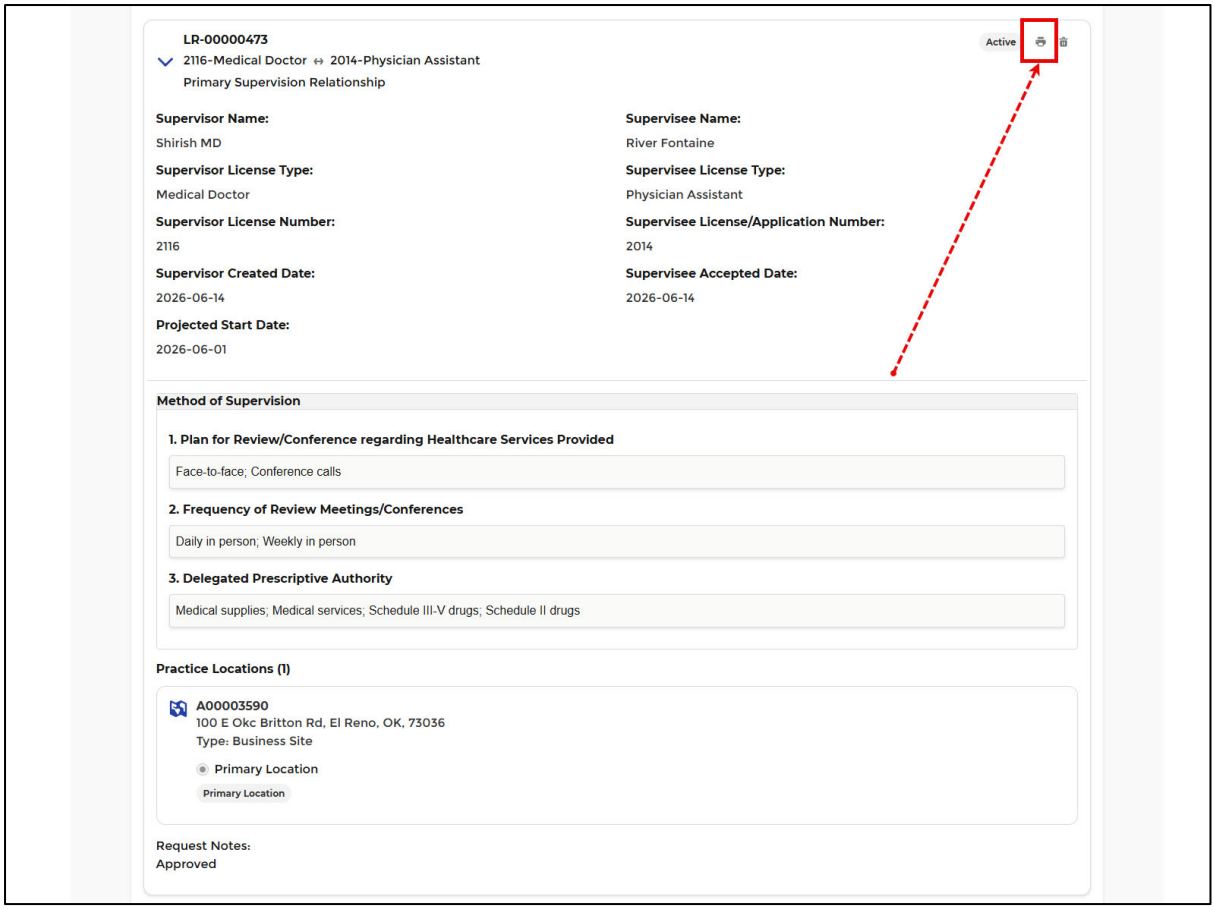
Once the request is approved by both parties, the relationship appears in the Active Relationship section because both the supervisor and supervisee hold active licenses, and no action is required from OMB staff. If the supervisee is an applicant and needs a temporary letter, OMB staff will review the Relationship/Form-5 and either approve or reject it accordingly.

Next, navigate to the My Relationship tab. You will see the update on your dashboard, and the active record will also appear in the My Relationship tab.

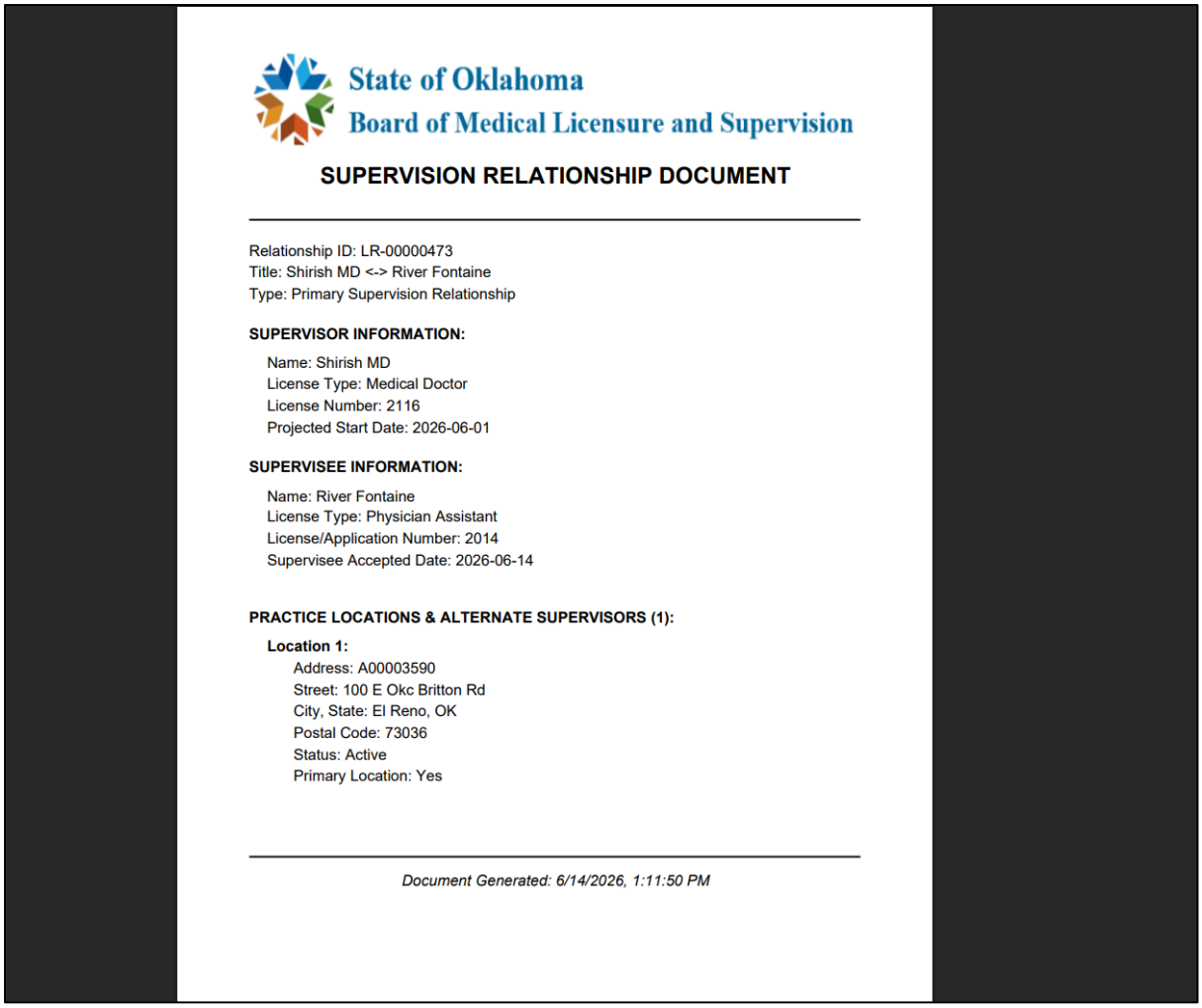


Expand the relationship record to verify that all details are displayed correctly. From there, you can also print the record.




LR-00000473
2116-Medical Doctor ↔ 2014-Physician Assistant
Primary Supervision Relationship
Active
Supervisor Name:
Shirish MD
Supervisee Name:
River Fontaine
Supervisor License Type:
Medical Doctor
Supervisee License Type:
Physician Assistant
Supervisor License Number:
2116
Supervisee License/Application Number:
2014
Supervisor Created Date:
2026-06-14
Supervisee Accepted Date:
2026-06-14
Projected Start Date:
2026-06-01
Method of Supervision
1. Plan for Review/Conference regarding Healthcare Services Provided
Face-to-face; Conference calls
2. Frequency of Review Meetings/Conferences
Daily in person; Weekly in person
3. Delegated Prescriptive Authority
Medical supplies; Medical services; Schedule III-V drugs; Schedule II drugs
Practice Locations (1)
A00003590
100 E Okc Britton Rd, El Reno, OK, 73036
Type: Business Site
Primary Location
Primary Location
Request Notes:
Approved

Once you click on Print icon, a pdf will be downloaded that looks like this.



State of Oklahoma
Board of Medical Licensure and Supervision

SUPERVISION RELATIONSHIP DOCUMENT

Relationship ID: LR-00000473
Title: Shirish MD <-> River Fontaine
Type: Primary Supervision Relationship

SUPERVISOR INFORMATION:

Name: Shirish MD
License Type: Medical Doctor
License Number: 2116
Projected Start Date: 2026-06-01

SUPERVISEE INFORMATION:

Name: River Fontaine
License Type: Physician Assistant
License/Application Number: 2014
Supervisee Accepted Date: 2026-06-14

PRACTICE LOCATIONS & ALTERNATE SUPERVISORS (1):

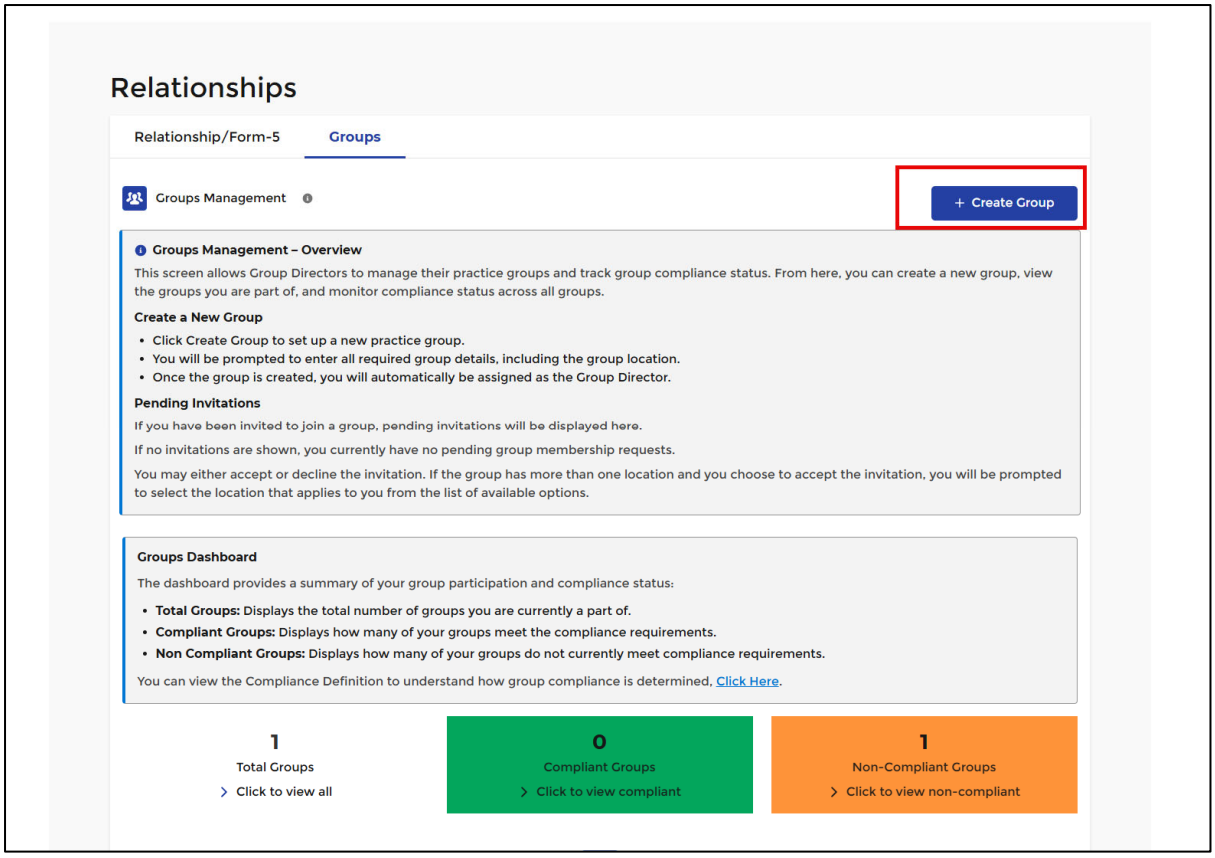
Location 1:
Address: A00003590
Street: 100 E Okc Britton Rd
City, State: El Reno, OK
Postal Code: 73036
Status: Active
Primary Location: Yes

Document Generated: 6/14/2026, 1:11:50 PM

Group Management (Group Director)

Groups Management – Overview

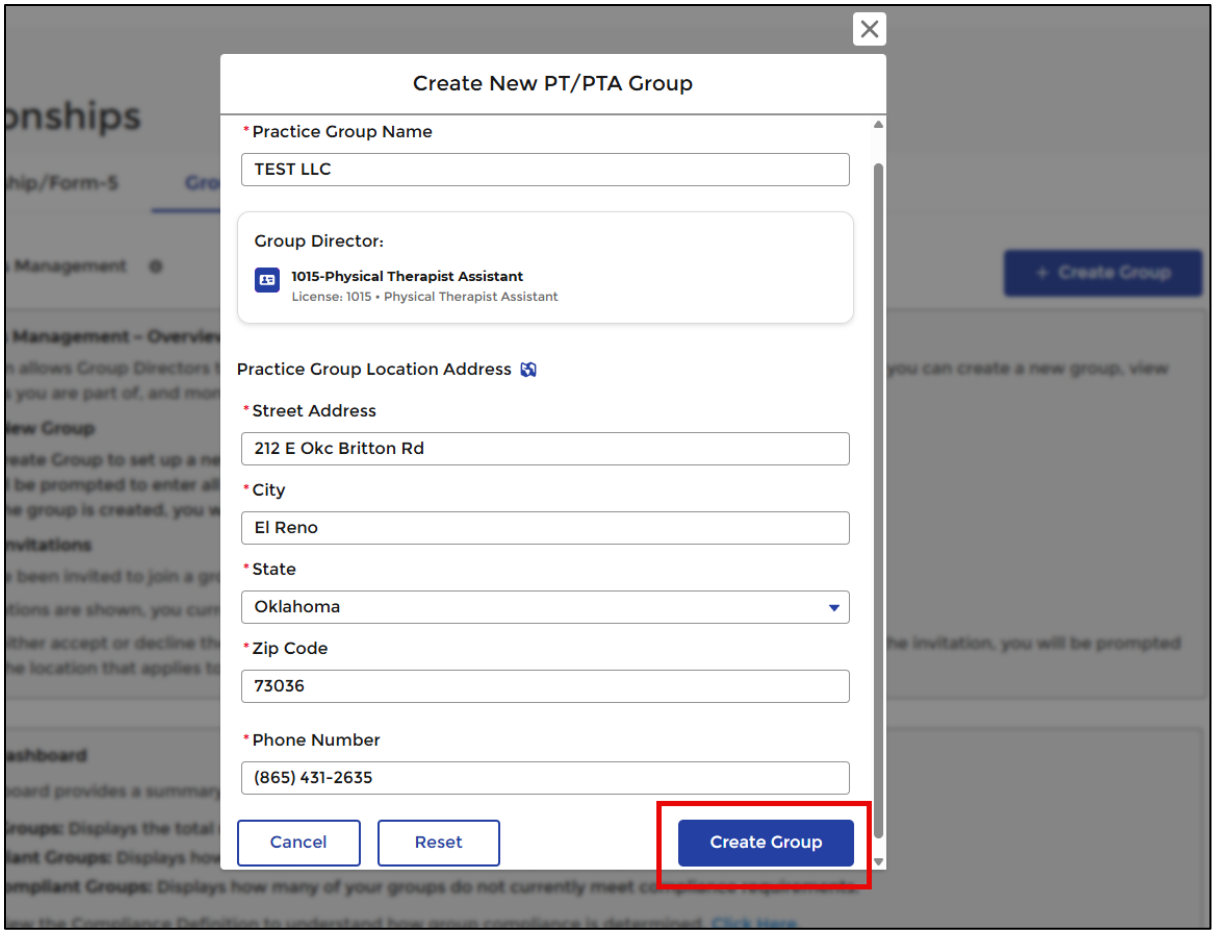
If you hold an active Physical Therapist or Physical Therapist Assistant license, you can create your own group as a Group Director and add members. If you have a submitted application for a Physical Therapist or Physical Therapist Assistant license, you must be added to a group before you can see it on the Group Dashboard.



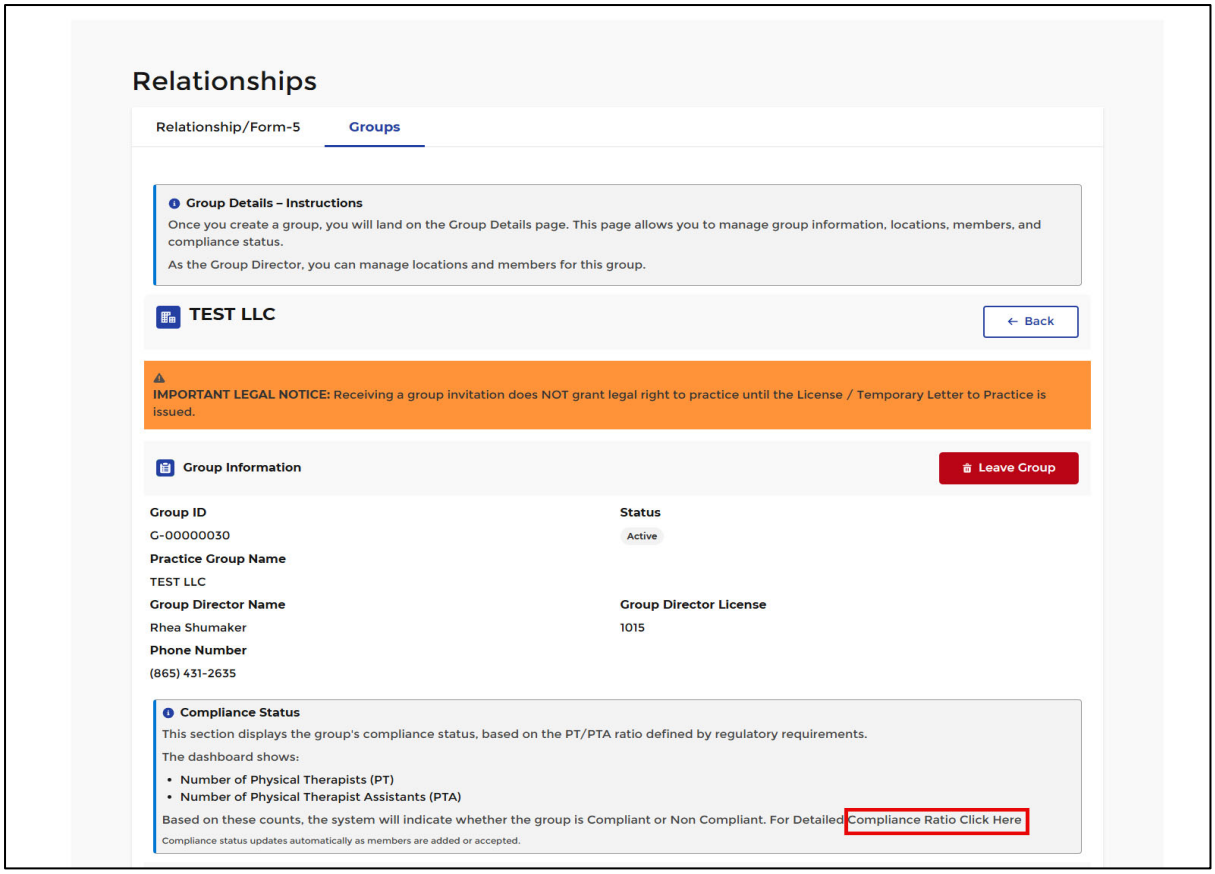
From here, you can **create a new group**, view the groups you are part of, and monitor compliance status across all groups.

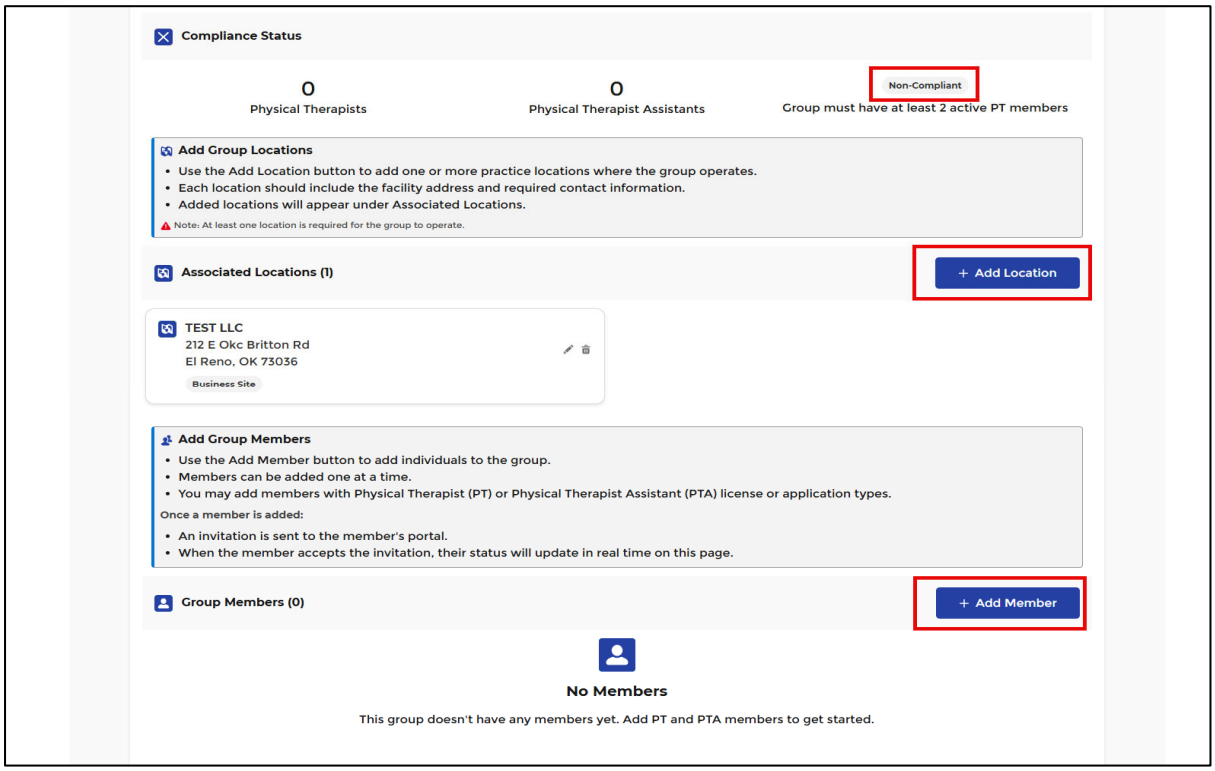
Create New Group

- Click **Create Group** to set up a new practice group.
- You will be prompted to enter **all required group details**, including the **group location**.
- You can see that your details are populated as a Group Director because you created the group.

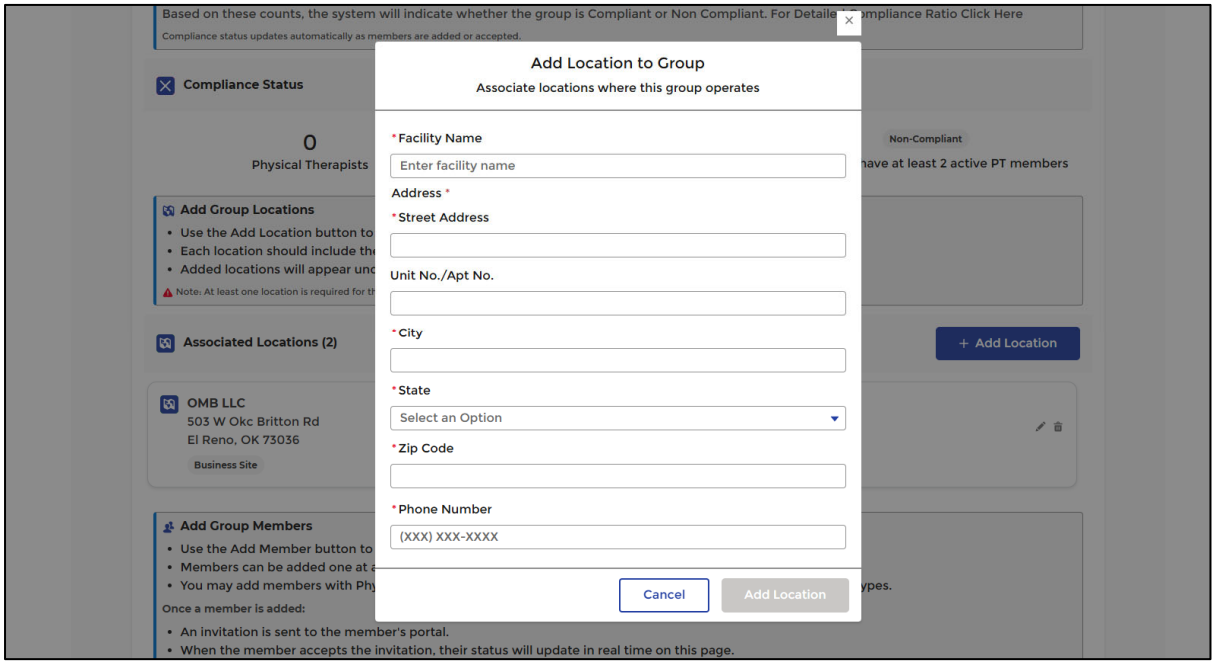


Upon creation, you will land on the Group Detail page, where you can add additional locations and members, such as PT/PTA license holders or an applicant, within the compliance limit. If you do not meet the compliance limit, the system will display a notice accordingly. You can also view compliance-related information in the Compliance Status Instructions section.

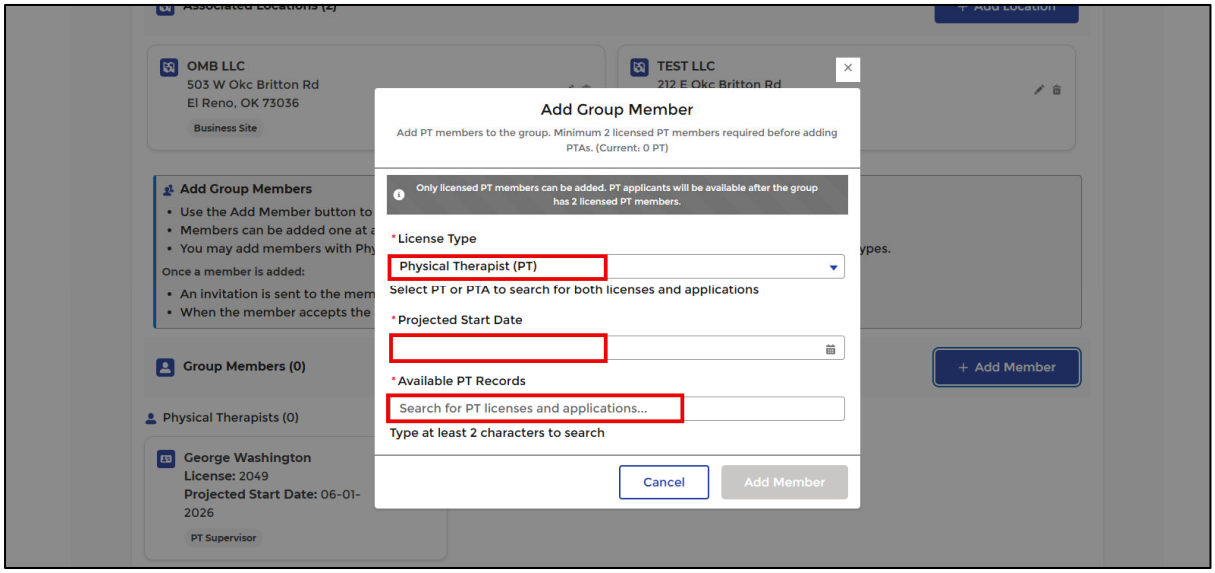

Relationships
Relationship/Form-5
Groups
Group Details – Instructions
Once you create a group, you will land on the Group Details page. This page allows you to manage group information, locations, members, and compliance status.
As the Group Director, you can manage locations and members for this group.
TEST LLC
← Back
IMPORTANT LEGAL NOTICE: Receiving a group invitation does NOT grant legal right to practice until the License / Temporary Letter to Practice is issued.
Group Information
Leave Group
Group ID
G-00000030
Status
Active
Practice Group Name
TEST LLC
Group Director Name
Rhea Shumaker
Group Director License
1015
Phone Number
(865) 431-2635
Compliance Status
This section displays the group's compliance status, based on the PT/PTA ratio defined by regulatory requirements.
The dashboard shows:
Number of Physical Therapists (PT)
Number of Physical Therapist Assistants (PTA)
Based on these counts, the system will indicate whether the group is Compliant or Non Compliant. For Detailed Compliance Ratio Click Here
Compliance status updates automatically as members are added or accepted.

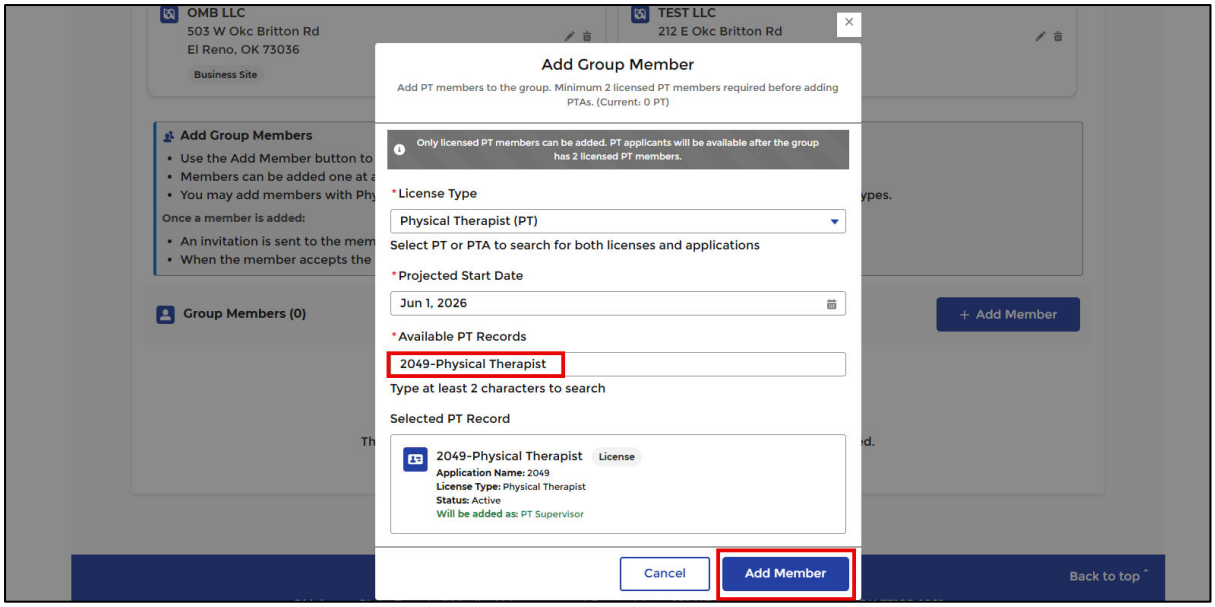

Compliance Status
0
Physical Therapists
0
Physical Therapist Assistants
Non-Compliant
Group must have at least 2 active PT members
Add Group Locations
Use the Add Location button to add one or more practice locations where the group operates.
Each location should include the facility address and required contact information.
Added locations will appear under Associated Locations.
Note: At least one location is required for the group to operate.
Associated Locations (1)
+ Add Location
TEST LLC
212 E Okc Britton Rd
El Reno, OK 73036
Business Site
Add Group Members
Use the Add Member button to add individuals to the group.
Members can be added one at a time.
You may add members with Physical Therapist (PT) or Physical Therapist Assistant (PTA) license or application types.
Once a member is added:
An invitation is sent to the member's portal.
When the member accepts the invitation, their status will update in real time on this page.
Group Members (0)
+ Add Member
No Members
This group doesn't have any members yet. Add PT and PTA members to get started.

Add additional locations



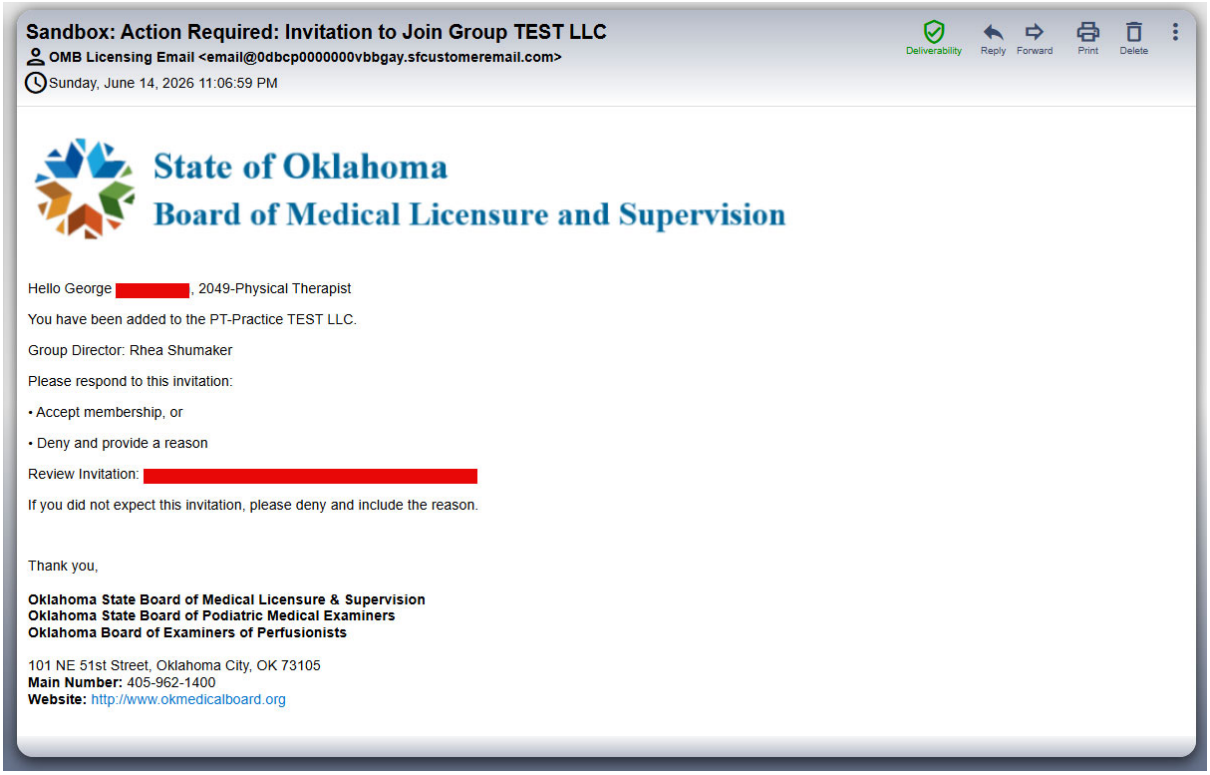
Add PT/PTA Members.



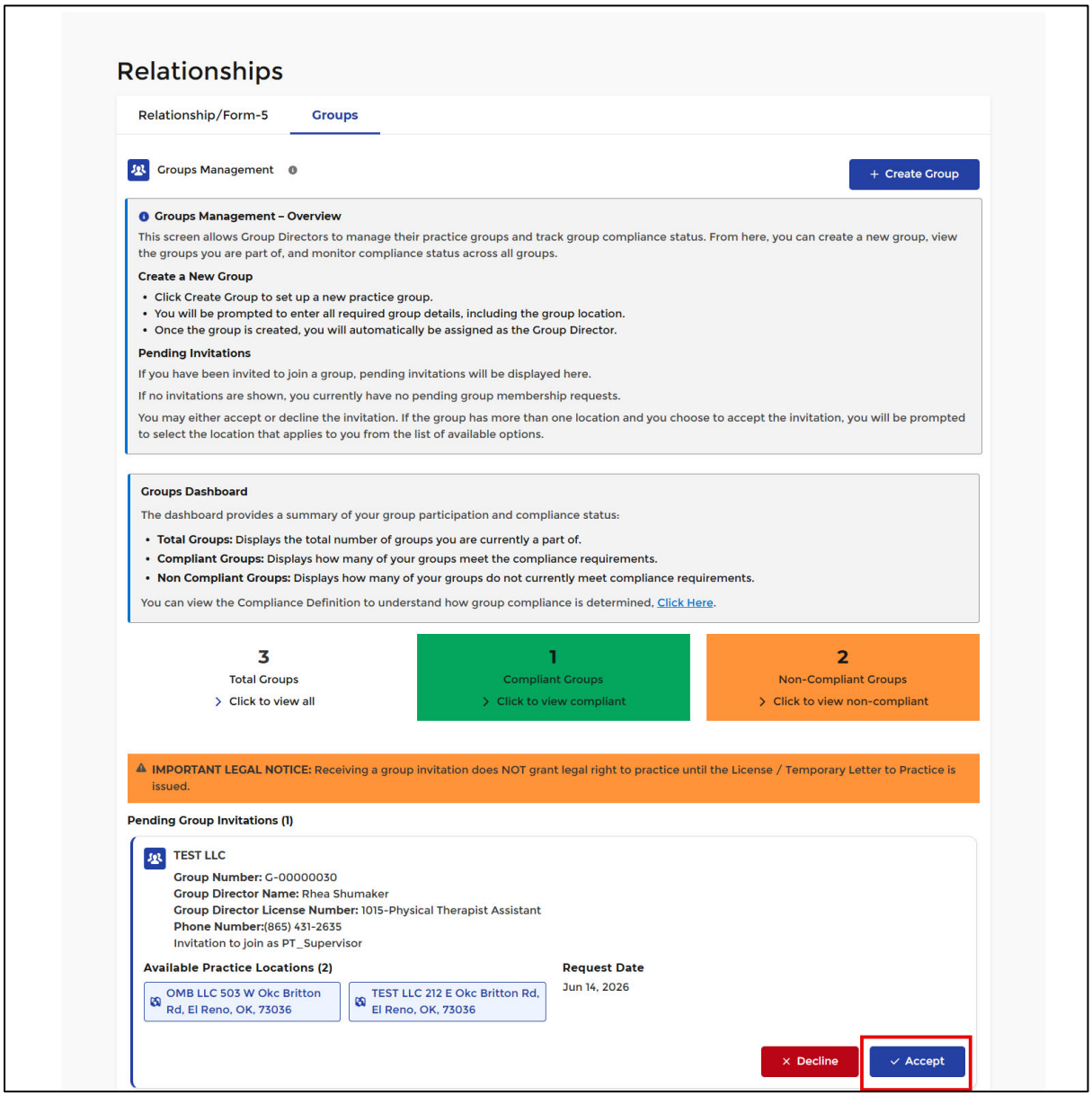


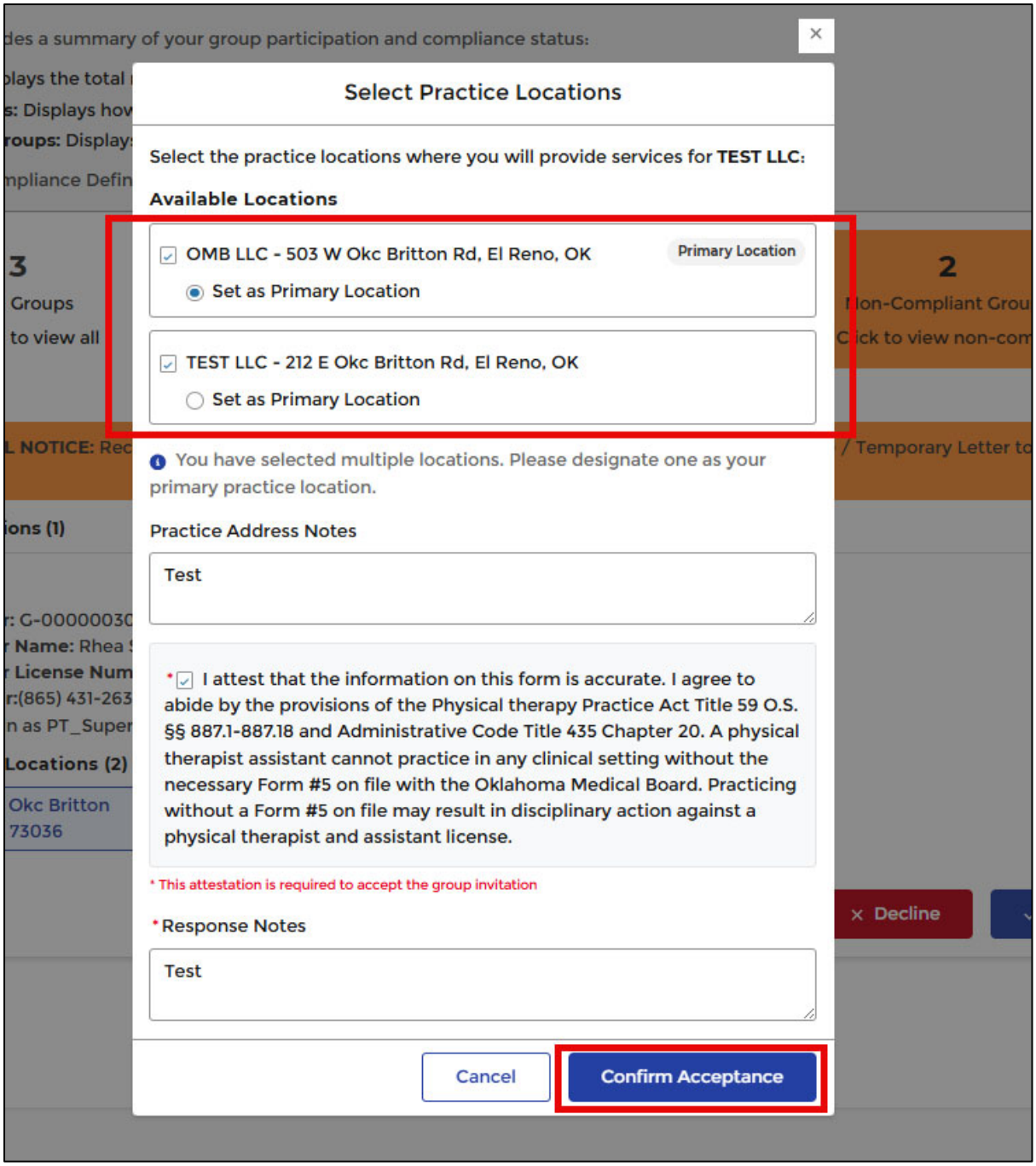
Members receive invitations and respond

All added members will receive an email stating that they have been added to a group. They should review the invitation and either accept or reject it.



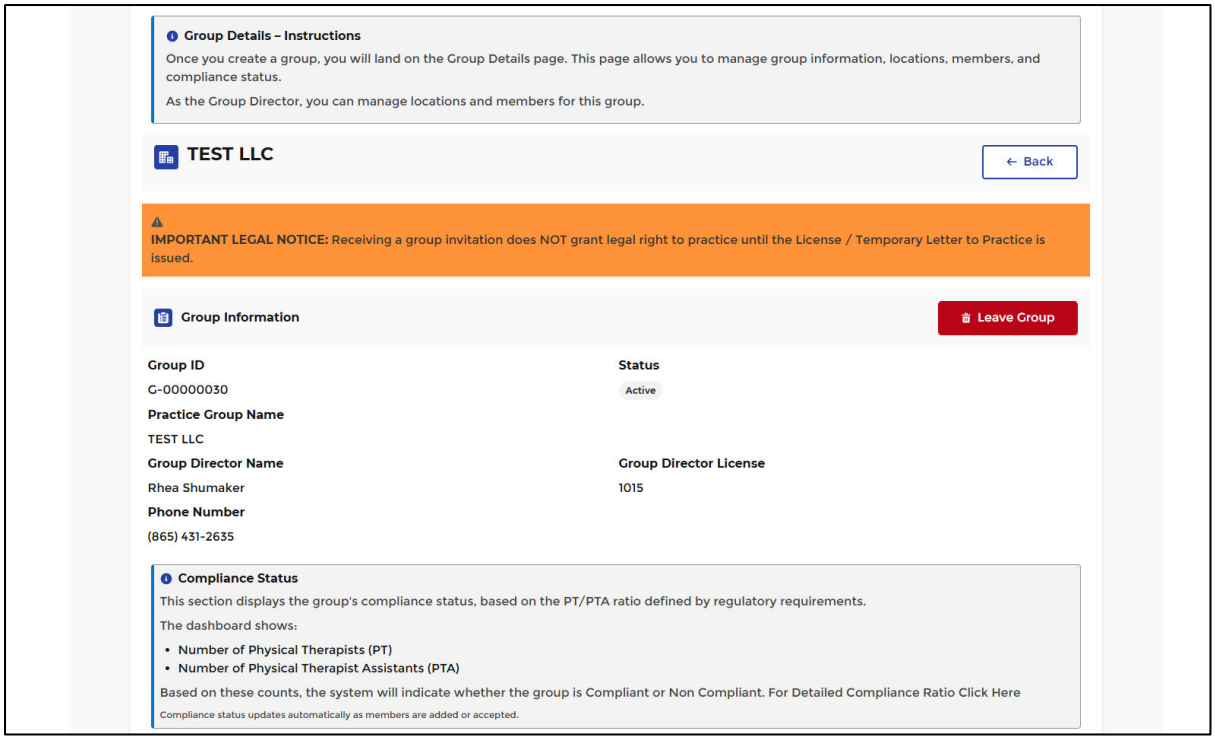
On the Group Dashboard, the user should see an invitation with the relevant details and have the option to accept or decline it. If the user clicks Accept, they can designate the specific locations where they will be available.

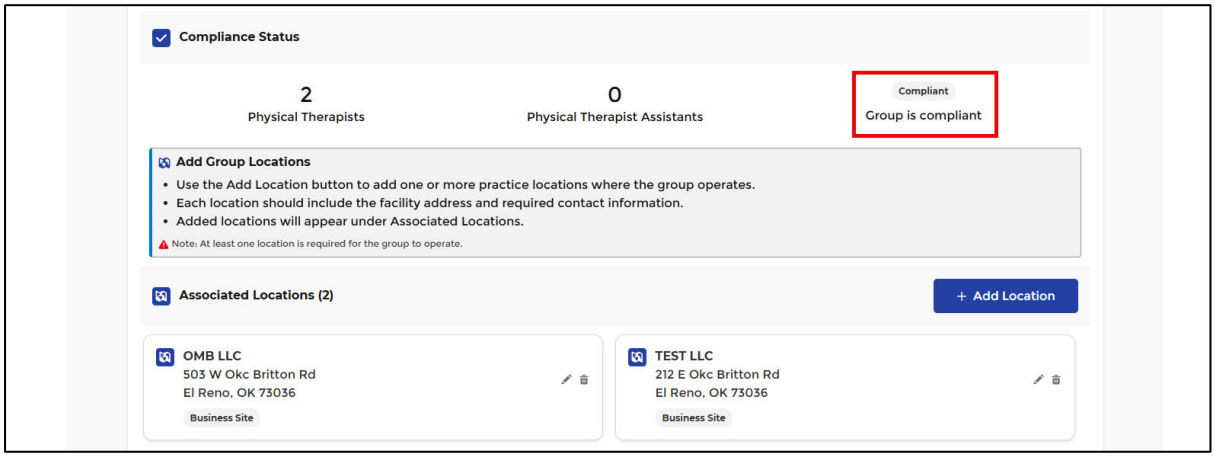


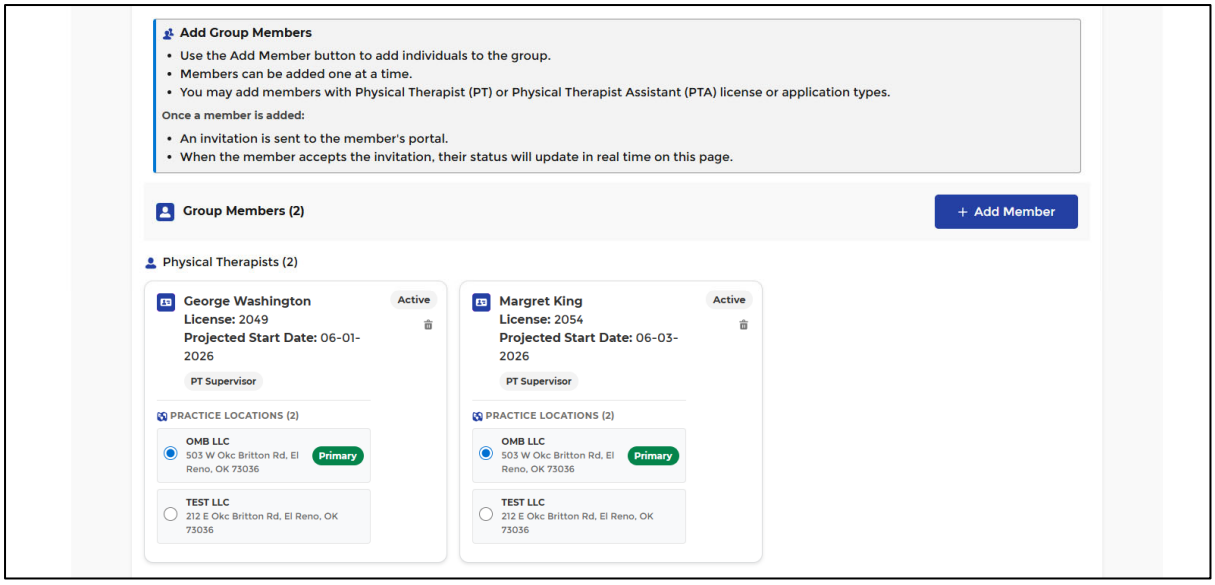


Group Status Updates Automatically

Once the request has been accepted, the Group Status will automatically update to Compliant. As a Group Director, you can also view additional member details, such as the location they have designated as Primary.


Group Details – Instructions
Once you create a group, you will land on the Group Details page. This page allows you to manage group information, locations, members, and compliance status.
As the Group Director, you can manage locations and members for this group.
TEST LLC
← Back
IMPORTANT LEGAL NOTICE: Receiving a group invitation does NOT grant legal right to practice until the License / Temporary Letter to Practice is issued.
Group Information
Leave Group
Group ID
G-00000030
Status
Active
Practice Group Name
TEST LLC
Group Director Name
Rhea Shumaker
Group Director License
1015
Phone Number
(865) 431-2635
Compliance Status
This section displays the group's compliance status, based on the PT/PTA ratio defined by regulatory requirements.
The dashboard shows:
Number of Physical Therapists (PT)
Number of Physical Therapist Assistants (PTA)
Based on these counts, the system will indicate whether the group is Compliant or Non Compliant. For Detailed Compliance Ratio Click Here
Compliance status updates automatically as members are added or accepted.


Compliance Status
2
Physical Therapists
0
Physical Therapist Assistants
Compliant
Group is compliant
Add Group Locations
Use the Add Location button to add one or more practice locations where the group operates.
Each location should include the facility address and required contact information.
Added locations will appear under Associated Locations.
Note: At least one location is required for the group to operate.
Associated Locations (2)
+ Add Location
OMB LLC
503 W Okc Britton Rd
El Reno, OK 73036
Business Site
TEST LLC
212 E Okc Britton Rd
El Reno, OK 73036
Business Site



Users can also see all the groups they belong to and how many are compliant versus non-compliant.

