


# Omni Healthcare Communications LLC



## STANDARD OPERATING PROCEDURE

TITLE:	New Project Workflow	SOP #:	OMN-108.00
DEPT:	Operations	REVISION #:	1.1
PREPARED BY:	James Lilliech	EFFECTIVE DATE:	09/01/2020
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SIGNATURE:		SIGNATURE DATE	09/01/2020

### 1.0 Purpose

1.1 To describe the process by which Operations will set up pertinent folders, subscriptions, names, and accounts for new projects.

### 2.0 Scope

2.1 These procedures apply to all Omni Healthcare Communications LLC (OMNI-HC's) employees, consultants, and contractors.

### 3.0 Definitions

3.1 SOP - Standard Operating Policy and/or Procedure.

3.2 O365 - Office 365 Suite

3.3 Project - A properly authorized job for a client or a potential client.

3.4 SOW - Statement of Work

3.5 OPS - Operations Personnel

3.6 CDA – Confidentiality Disclosure Agreement

### 4.0 Responsibility

4.1 All OMNI-HC operations and management personnel will follow the procedures and guidelines presented in this document.

4.2 The OMNI-HC Managing Partner (MP), or authorized designee, will be responsible for updating and maintaining this SOP.

4.3 The MP, or authorized designee, is responsible for certifying that all management personnel receive adequate training to follow the instructions contained within this SOP.

### 5.0 Outline

5.1 The MP, or authorized designee, will ensure that all new Projects have the required naming conventions, i.e., SharePoint site(s), BigTime, and QuickBooks accounts.

5.2 The MP, or authorized designee, will follow the workflow listed in this document to ensure a smooth transition into the workflow.

### 6.0 Procedures

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6.1 The following procedures will be labelled with an (M) or (O). (M) is a responsibility of management personnel and (O) is a responsibility of Operations personnel. These responsibilities can be delegated by sending an email with instructions and a clear request.

6.2 (M) Once a Client has had an introductory meeting and it has been decided to pursue a CDA or contract, a prospective Client folder will be created by the Team lead in the Business Development folder of the respective Company Corporate drive.

6.2.1 (M) All Drafts of CDA's, contract's or proposals will be created and stored in the Business Development prospective Client folder.

6.2.2 (M) Upon full execution of an MSA or SOW, the prospective Client folder will be moved from business Development to the Client section of the Company Corporate drive.

6.2.2.1 (M) The following documents will be stored in this file:

- Project Proposals
- All MSA drafts
- All CDA drafts
- All SOW's drafts
- All contract Amendments drafts
- All Budgets and Time Allocations for any project(s)

6.2.2.2 (M) The files will be saved in their entirety. The signature page alone is not acceptable

6.2.2.3 (M) A new folder will be created under the Client folder for each individual project that is pursued

6.2.2.4 (M) Any new proposals will be stored in the Project folders as they are created or received.

6.3 (M) SOW and Budget Creation

6.3.1 (M) Will create an Excel time allocation budget using the budget template in the Templates folder on the company Corporate drive.

6.3.2 The project budget will be saved to Project file folder in the client section of the Corporate drive.

6.3.3 (M) All SOW drafts will be saved to an "SOW" folder in the Project folder.

6.3.4 (M) Final draft of SOW will then be shared with Managing Partners, COO of company, and partners or other stakeholders in the Project.

6.3.5 (M) The person(s) responsible for drafting the SOW will collect all feedback and finalize the SOW.

6.3.5.1 (M) All Managing Partners, COO of company and partner or stakeholders will be given 3 days to respond at which time all feedback will be deemed final.

6.3.6 (M) Finalized SOW's will be sent to the Client in a signed and dated PDF form by the Managing Partner or COO of company.

6.3.7 (M) The fully executed SOW's will be stored in the SOW folder on the Corporate drive under the Financials folder.

6.4 (M) Subcontractor Agreement Creation, Storage, and Distribution

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6.7 (M) The SOW creator will share the budget and Fully Executed SOW with Operations and identify the names of employees/contractors that will be working on the project and in what budget identified capacity with Operations.

6.7.1 (M) Management will also give Operations a brief description of the project to assist in creating the proper nomenclature for the Project.

6.8 (O) Creation of Project in BigTime

6.8.1 (O) Will create the Client and Project in BigTime:

6.8.2 (O) Will create a Project number using SOP 104.

6.8.3 (O) Will add the job(s) and tasks into BigTime.

6.8.3.1 (O) Will add hour allocations into Jobs and/or tasks.

6.8.3.2 (O) Will add specific tasks for sub-contractor team members if needed.

6.8.4 (O) Operations will add permissions for Project Manager(s).

6.9 (O) Creation of QuickBooks account and Invoicing

6.9.1 (O) Will create QuickBooks account for Client.

6.9.2 (O) Will create an initial invoice according to the terms of the SOW.

6.9.3 (O) Will notify Management of the draft invoice and request review.

6.9.4 (M) Will review invoice and send to the client using the auto email send system from QuickBooks.

6.10 (O) Creation of SharePoint sites

6.10.1 (O) Will create a SharePoint site for the Client and any project sub-sites for the Project(s).

6.12 (O) Sub-Contractor Project Amendments

6.12.1 (O) Will notify Management of the need for Sub-Contractor Project Amendment/s.

6.13 (M) Management will create Sub-Contractor Project Amendment/s.

6.13.1 (M) Will use excel budget for each individual amendment.

6.13.2 (M) Will save all drafts in the Client Project folder.

6.13.3 (M) Will save the fully executed PDF version in the Addendums folder on the Company Corporate drive under Contracts. (Corporate/Contracts/Subcontractor/Addendums).

6.14 (O) Will ensure all that all details on the amendments are in alignment with the Tasks and Activities allocated in BigTime

6.15 (O) Sharing the Client O365 SharePoint site and Project site

6.15.1 (O) Will share the Client site with all members of the client and internal team.

6.15.2 (O) Will share the project subsite with members of the internal team and management.

6.16 (O) Will notify Management and Project Manager that all project-related information has been created.

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