


Omni Healthcare Communications LLC



STANDARD OPERATING PROCEDURE

TITLE:	New Sub-Contractor Approval and Onboarding	SOP #:	OMN-107.00
DEPT:	Operations	REVISION #:	1.1
PREPARED BY:	James Lilliech	EFFECTIVE DATE:	09/01/2020
APPROVED BY:	Stephen M. Casey		Page 1 of 3
SIGNATURE:		SIGNATURE DATE	09/01/2020

1.0 Purpose

1.1 To describe the process by which Operations will contract and onboard new sub-contractors and set up pertinent folders, subscriptions, and accounts.

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.

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 employees, consultants, and contractors under direct supervision of OMNI-HC will have access to the required documentation, email accounts, O365 programs, and SOP training to complete their duties in an efficient and professional manner.

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

6.0 Procedures

6.1 The procedures following 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.

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6.2 (M) The Contractor's CV will be stored in a new folder created with the contractor's name under financials on the Corporate drive of the pertinent OMNI-HC company's SharePoint page and shared with partners with a share link.

6.3 (M) Management will have the contractor review and sign their Sub-contractor agreement.

6.4 (M) When Contractor signs and returns their sub-contractor agreement, Management will upload the document to the contractor's SharePoint folder and share with Operations using a share link. If sub-contractor has returned the signature page only, Management will integrate the final signature page into the contract.

6.5 (M) Management will complete the "New Contractor Form" on the pertinent Corporate SharePoint page to supply the required information to create the accounts needed.

6.5.1 (M) Management will identify on the "New Contractor Form" if the Contractor is being assigned to an existing project or will be on hold until a project is obtained or defined.

6.6 (O) Operations will create a new contractor in QuickBooks which will prompt the user to supply their W-9 and various other information.

6.7 (M) If Management has identified in step 6.5.1 that the Contractor is on hold for a project to be obtained or defined:

6.7.1 (O) Operations will not create an O365 account or a BigTime account for the new contractor until Management has identified for Operations when a project has been obtained or defined for the contractor.

6.8 (M) If Management has identified in step 6.5.1 that the Contractor is being assigned to an existing project:

6.8.1 (O) Operations will create an O365 account for the user. Software licenses may be supplied if the user does not currently have a full Office Suite.

6.8.2 (O) Operations will create a BigTime account for the user which will prompt the user to set up their account via email.

6.9 (O) Once all documentation has been collected and accounts have been created for the user, Operations will contact the user to set up an onboarding training session for the software tools.

6.10 (O) Operations will schedule a time for SOP training before the contractor starts their assigned project.

6.11 (O) At the end of SOP training, Operations will send the contractor a link to the SOP Acceptance form for the pertinent company.

6.12 (O) Once the contractor signs the SOP Acceptance Form, Operations will enter their name onto the certified list and the Contractor will be ready to perform their assigned duties.

6.13 (O) Operations will notify Management once onboarding has been completed.

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