

# Order of Operations & Project Expectations

## Here is what to expect through the project process!

Once you have reviewed the scope of work and the agreement and determine we are the right fit for your project, the next step is to execute and return the agreement.

This order of operations can mimic as a checklist of sorts as it your reference guide to our project management flow.

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## Additional Resources Available to Your Team

NAMAS Forum  
DM & NAMAS Blog  
NAMAS Weekly Audit Tips

For information on accessing these complimentary resources, email [loestreich@drsmgmt.com](mailto:loestreich@drsmgmt.com)

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[www.namas.co](http://www.namas.co)

	<b>Welcome Aboard!</b>
<input type="checkbox"/>	You will receive a welcome aboard email identifying key team members that will be assigned to your project. This will include a Senior Management Consultant that will lead the day-to-day project operations.
<input type="checkbox"/>	A kickoff call is scheduled as this is a great way to meet your Senior Management Consultant and discuss "gray area" policies and timeline expectations.
	<b>Audit Sample</b>
<input type="checkbox"/>	A spreadsheet template has been provided for identification of the sample
<input type="checkbox"/>	Unless otherwise identified in the scope of work, the Client typically identifies the sample.
	<b>Documentation Upload</b>
<input type="checkbox"/>	DM will provide access to ShareFile as the preferred method, but if the Client cannot use ShareFile, other secure access points can be considered
<input type="checkbox"/>	Client will upload all information to Sharefile for the review process. Our team will access from this mutual upload point, audit, and redeposit audit findings in a "completed" folder in ShareFile as well.
	<b>Documentation our Team Reviews</b>
<input type="checkbox"/>	Billing for each service, preferably via a reprint of copy of the claim form
<input type="checkbox"/>	Documentation of the service being reviewed
<input type="checkbox"/>	Any external documentation referenced
<input type="checkbox"/>	Abbreviation master reference, if applicable
	<b>Audit Report Completion</b>
<input type="checkbox"/>	Our team should be notified of who should have access to the ShareFile Folder for direct access.
<input type="checkbox"/>	As the audits are completed they will be uploaded. Audit will NOT be held for project completion.
<input type="checkbox"/>	Everything will be uploaded to Sharefile, and you should receive an email informing you of each upload.
	<b>Feedback &amp; Education</b>
<input type="checkbox"/>	Our team will rely on assistance from your team in scheduling provider education review sessions as appropriate
	<b>Corrective Active Plan</b>
<input type="checkbox"/>	If required, based on precision error rate of each provider, a corrective action plan should be developed.