

# Samantha Lynn Agency



ONLINE BUSINESS MANAGEMENT AND  
VIRTUAL ASSISTANCE SERVICES



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# *Hey there!*

My name is Samantha Fleming, and I run Samantha Lynn Agency. I have been an office administrator for more than seven years, and I am passionate about helping therapists and private practice owners by taking things off of your to-do list, so you can do what it is that you set out to do - help others! Efficiency, honesty, and transparency are the pillars by which I run my business. Let me help you with the administrative tasks so that you can work with the people who need you.

*Warmly,  
Samantha*





# Why should you hire me?

Finding the right fit for your business can be difficult, but you need someone who will merge seamlessly with your practice. I have more than 7 years experience working in a front office setting of a medical office, so I have been doing the admin work for a while. It comes easy to me, and because it has a logical order and system to it, I am good at it. I love having new challenges thrown my way and learning how to do new tasks. When clients ask if I can do something, if it's not something I've done before, I will figure out how to do it, and I'll do it well.

Before getting married, when I was in college, I took several psychology classes and I absolutely loved them. That was what I was going to finish college in, but then life happened, as it does, and I changed course. But after the crazy year that was 2020, I started looking for positions that would allow me to work from home, preferably for myself. When the opportunity to work for a friend, who is a therapist and practice owner, came along I jumped at it. She explained what she was looking for in a virtual assistant, and I realized that what she needed was someone to do the tasks that I do all day, every day. When she needed things from me that I didn't know how to do, I figured out how to do it for her, and I realized I loved this new position.

If you are interested in working together, contact me! I can't wait to talk to you and see how I can best help you in your practice.





# Virtual Assistant Services

1

## ADMIN SUPPORT

- Schedule management
- Email Management
- Proofread/editing
- Transcribe audio/handwritten notes

2

## COMMUNICATION

- Coordinate new client paperwork
- Update client EHR
- Send appointment reminders
- Send out of office reminders

3.

## BILLING AND ACCOUNTING

- Invoice clients and post payments
- Generate SuperBills for client insurance submission
- Submit insurance claims
- Troubleshooting and claim follow up
- Benefit and eligibility verification
- Follow up on unpaid invoices

4

## PERSONAL ASSISTANCE

- Personal Email Management

# VA Packages

Once you have decided on a package, you will be emailed a contract. Due at contract signing is a \$200 non-refundable deposit. This deposit is applied to your first month's invoice. You will be emailed an invoice on the 1st of each month for the coming month. Payment is due upon receipt. A 15% late fee is added on the 15th of each month if payment is not received. Up to 5 unused hours may roll over from the first month only, so we can find which package fits your practice best. Additional hours will be billed at \$35/hour.



## Basic Plan \$660

20 hours / Month

This package works best for a single therapist, or part-time practices.



## Advanced Plan \$960

30 hours / Month

This package works best for 1-2 therapists in a full- or part-time practice.



## Premium Plan \$1200

40 hours / Month

This package is best for 3+ therapists operating in a full-time practice.





# Online Business Management Services

1

## ADMIN SUPPORT

- Office Management
- EHR Audits
- CAQH Review
- Insurance Credentialing

2

## PROJECT MANAGEMENT

- Course/Program Launches
- Google Workspace Setup
- SOP Creation
- EHR Setup

3

## BILLING AND ACCOUNTING

- Sending Financial reports to Practice Owners

4

## TEAM MANAGEMENT

- Onboarding New Hires
- New Hire Setup within EHR and Payroll

# OBM Packages

Once you have decided on a package, you will be emailed a contract. Due at contract signing is a \$200 non-refundable deposit. This deposit is applied to your first month's invoice. You will be emailed an invoice on the 1st of each month for the coming month. Payment is due upon receipt. A 15% late fee is added on the 15th of each month if payment is not received. Additional hours will be billed at \$45/hour. If you purchase an OBM Package in addition to a VA Package, you will receive a 5% discount on the OBM Package price.



## OBM Basic \$450

10 hours / Month

This package is best for one OBM service plus weekly meetings.



## OBM Advance \$645

20 hours / Month

This package is best for practices with 2-3 therapists, that is planning to grow



## OBM Premium \$820

30 hours / Month

This package is best for 3+ therapists working full time with plans to grow.



# ADD ON SERVICES

The services listed on page 5 are services that are included in my packages. The services below are also something we can discuss. If there is something you need that is not listed on a previous page, contact me so we can discuss it. If I cannot take care of the service for you, I will do the best I can to find someone who can help you with your needs. If a set number of hours does not feel right, we can do an hourly rate, with a \$100 deposit due at contract signing for client setup. This fee is non-refundable. You will be invoiced on the 1st each month for the number of hours worked, based off of the tasks you need completed. Payment is due upon receipt. A 15% late fee will be added on the 15th of the month.



BULK MAILINGS

\$1.50/ENVELOPE

# FREQUENTLY ASKED QUESTIONS

## **WHY SHOULD I HIRE A VIRTUAL ASSISTANT?**

In hiring a virtual assistant, you save money by not needing to hire a full time employee, which means you don't need to pay for my benefits, PTO, or my overhead. I work for multiple clients, and those employee fees come out of my own overhead.

## **WILL YOU LET ME KNOW IF I AM COMING CLOSE TO MY ALLOTTED HOURS?**

Absolutely! When we have our discovery call, we will put in place when you'd like me to make you aware of how much time is left in the given month, and if you'd like to upgrade to the next package or if you'd like to add hours on at the hourly rate.

## **HOW DO I CANCEL MY CONTRACT?**

You can cancel at any time, but I do require two weeks notice. If you have a monthly package, you will be charged only for the hours I have completed for that month.

## **WHERE ARE YOU LOCATED?**

I am located in Alabama.

## **WHAT FORMS OF PAYMENT DO YOU ACCEPT?**

I accept all major credit cards and checks. Returned checks will be subject to a \$35 NSF fee.



# COMMUNICATION + BILLING

## **RUSH JOBS AND WEEKEND RATES**

Any projects that need to be completed in 48 hours or less, or projects that you require weekend hours to be completed will be charged at \$30/hour.

## **TIME TRACKING**

Hours will be tracked whenever I am working on one of your projects, and time will be rounded up to the nearest half hour

## **PROJECT TURN AROUND**

Turn around will be on a project to project basis. During our discovery call, we will discuss your needs and the timeframe you need completion by. We can schedule a zoom meeting/phone call on an on-going basis at no charge to you to discuss progress and new projects.

## **BUSINESS HOURS**

My typical work day is from 9am to 5pm central standard time Monday through Friday. I always try to let my clients know if I will be out of town, or not working for a holiday, but it is important to remember that when working with a Virtual Assistant, you are reserving a certain number of hours, not set hours during the day, unless otherwise agreed upon.

## **RESPONSE TIME**

You can expect a response from me typically within 24 hours.

## **PREFERRED CONTACT METHOD**

The fastest way to reach me is via email. You can also find me on Voxer, just search samfleming and you can send me a message or a voice memo.



# NEXT STEPS

1

## DISCOVERY CALL

During our discovery call, we will discuss what tasks you are looking to outsource, and how many hours you are looking to contract.

2

## CONTRACT & DEPOSIT

I will email you a contract, BAA, and W-9 form, and once you have signed, you will be invoiced for the \$100 deposit. Once paid, work will start.

3

## BILLING

You will be emailed a detailed invoice on the 1st of the month. Payment is due upon receipt. A 15% late fee will be added on the 15th.

4

## COMMUNICATION

If you require, we can meet monthly to discuss your upcoming month and the work you need assistance in completing. This is something we will discuss in the discovery call.



*Thank you!*

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Thank you for your interest in Samantha Lynn Agency. My goal is to make your life easier at work by checking some things off of your to-do list. We both know you can manage to do it all by yourself. But you shouldn't have to! I look forward to hearing from you. Let's chat about how I can help ease some of the chaos of being a business owner.

[SCHEDULE A CALL](#)