

VIRTUAL ASSISTANT SERVICES

| 2023 |

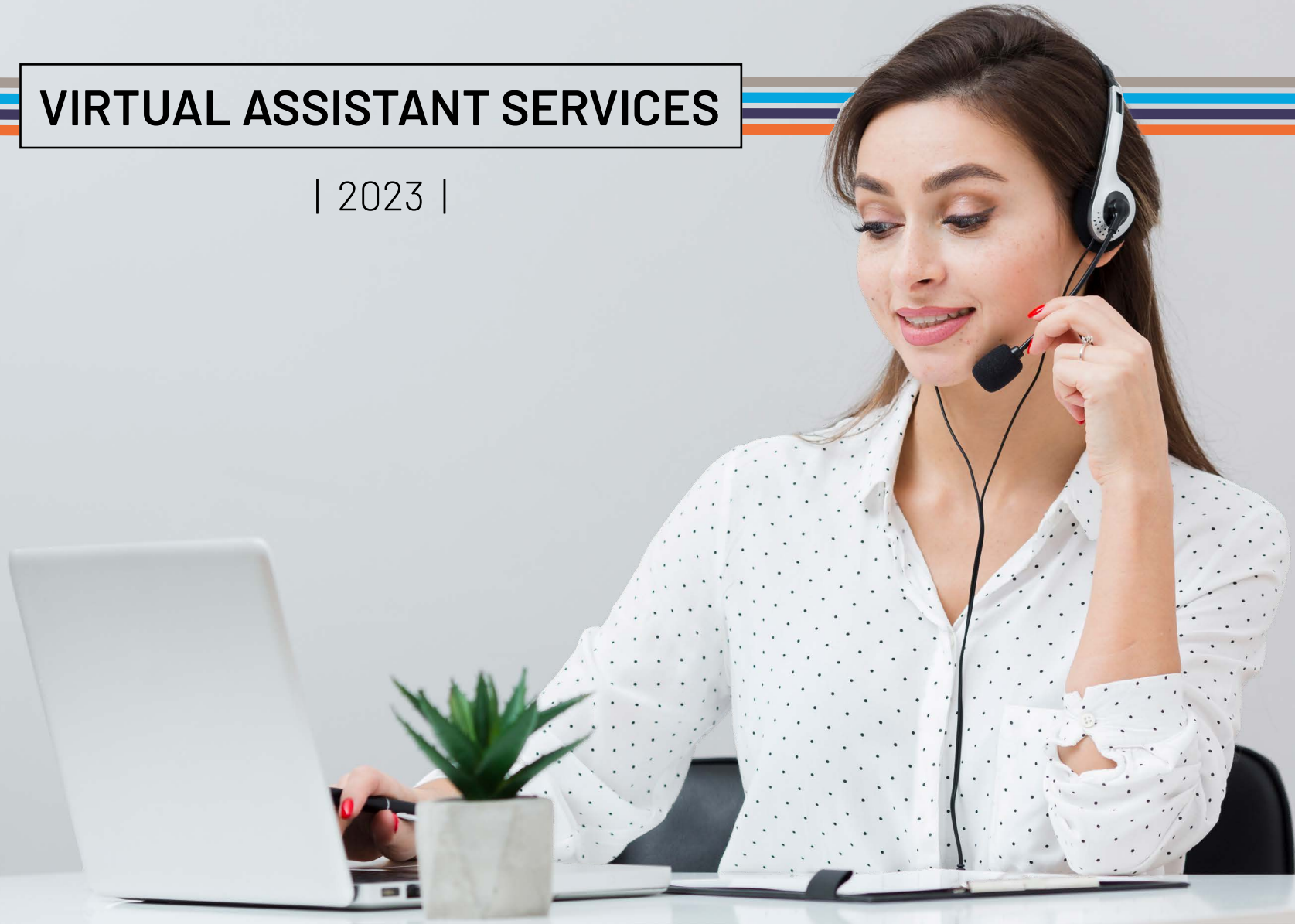


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LOCATIONS



Canada
7856 Egremont Road
Watford, Ontario
Canada N0M2S0



U.S.A.
5290 W. Coplay Road, Suite 10,
Whitehall, PA - 18052
(610) 435-5724



Puerto Rico
5859 Isla Verde Ave.
San Juan, Puerto Rico



India
Road # 3 Banjara Hills
Sri Nagar Colony
Hyderabad
Telangana - 500 034

India
Sector 4
MVP Colony
Visakhapatnam
Andhra Pradesh - 530 017



ABOUT US

INCEPTION



1998 - Founded by Manny Pena as H.I.M. ON CALL, later merged 4 firms to form Pena4 Inc.

HEADCOUNT



Started with 5 and today we have 500+ team members in 4 countries

REVENUE



56% Year Over Year Revenue Growth

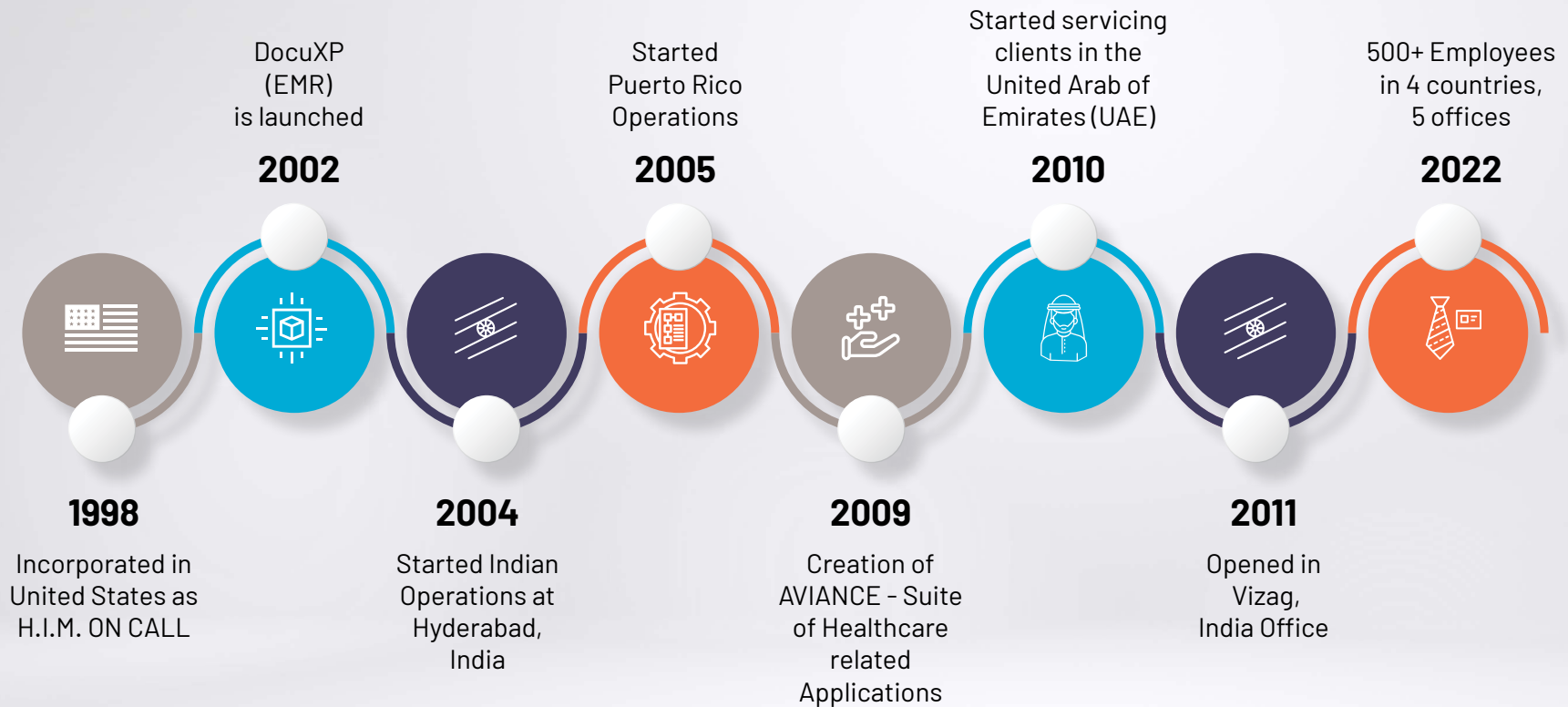
GROWTH



We are leaders in US healthcare RCM, and well diversified to BPO and Technology services

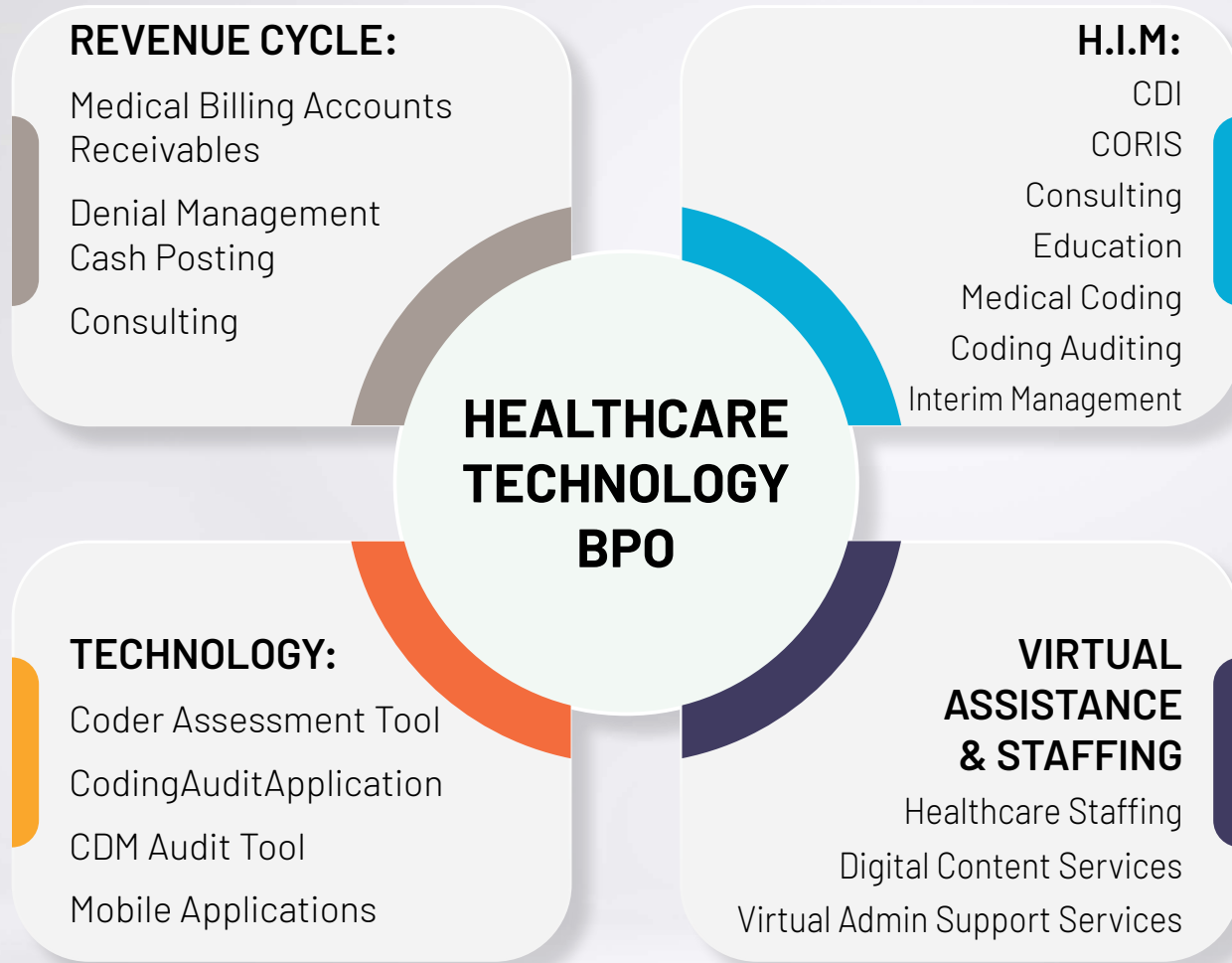


OUR JOURNEY





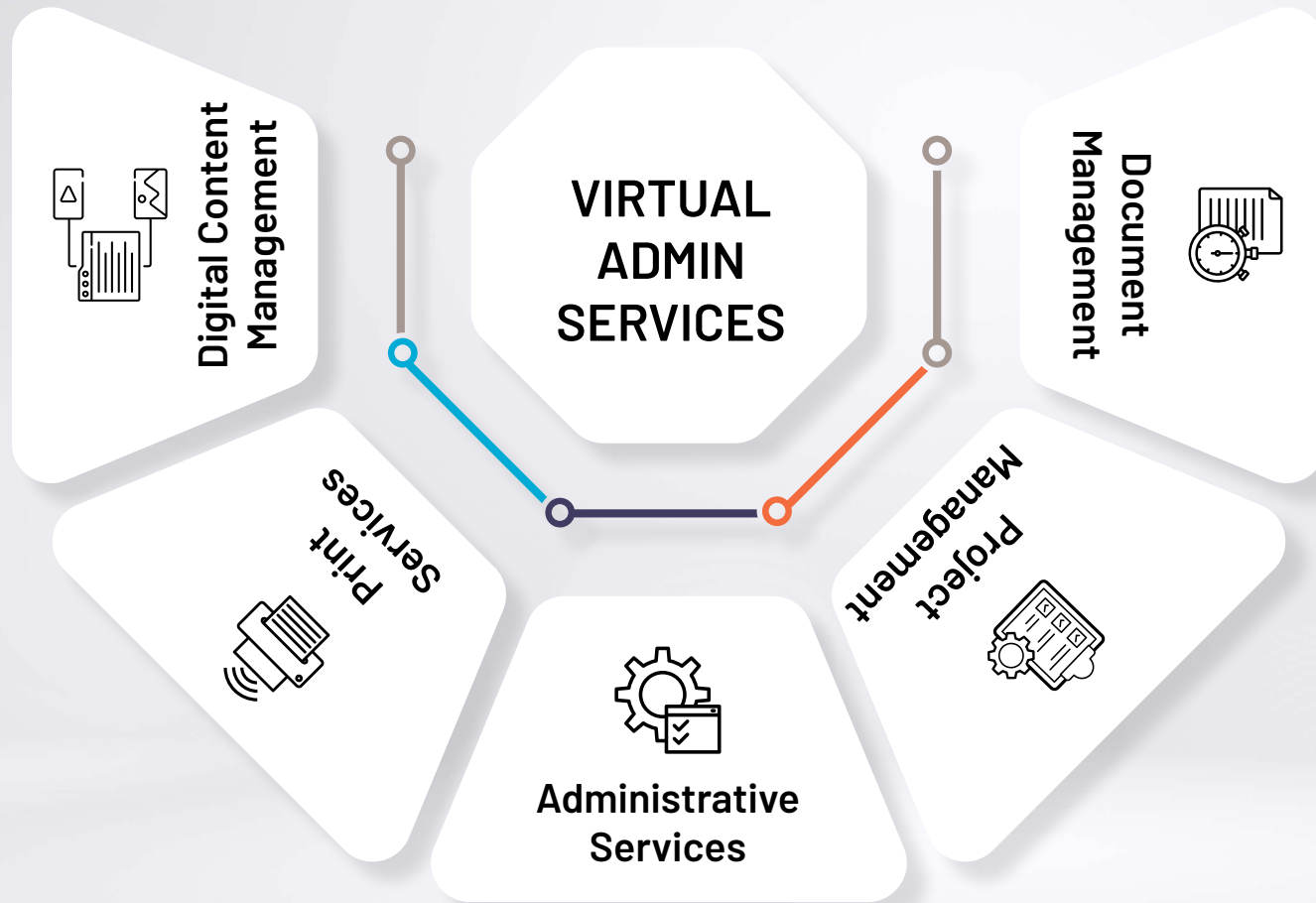
WHAT WE DO?



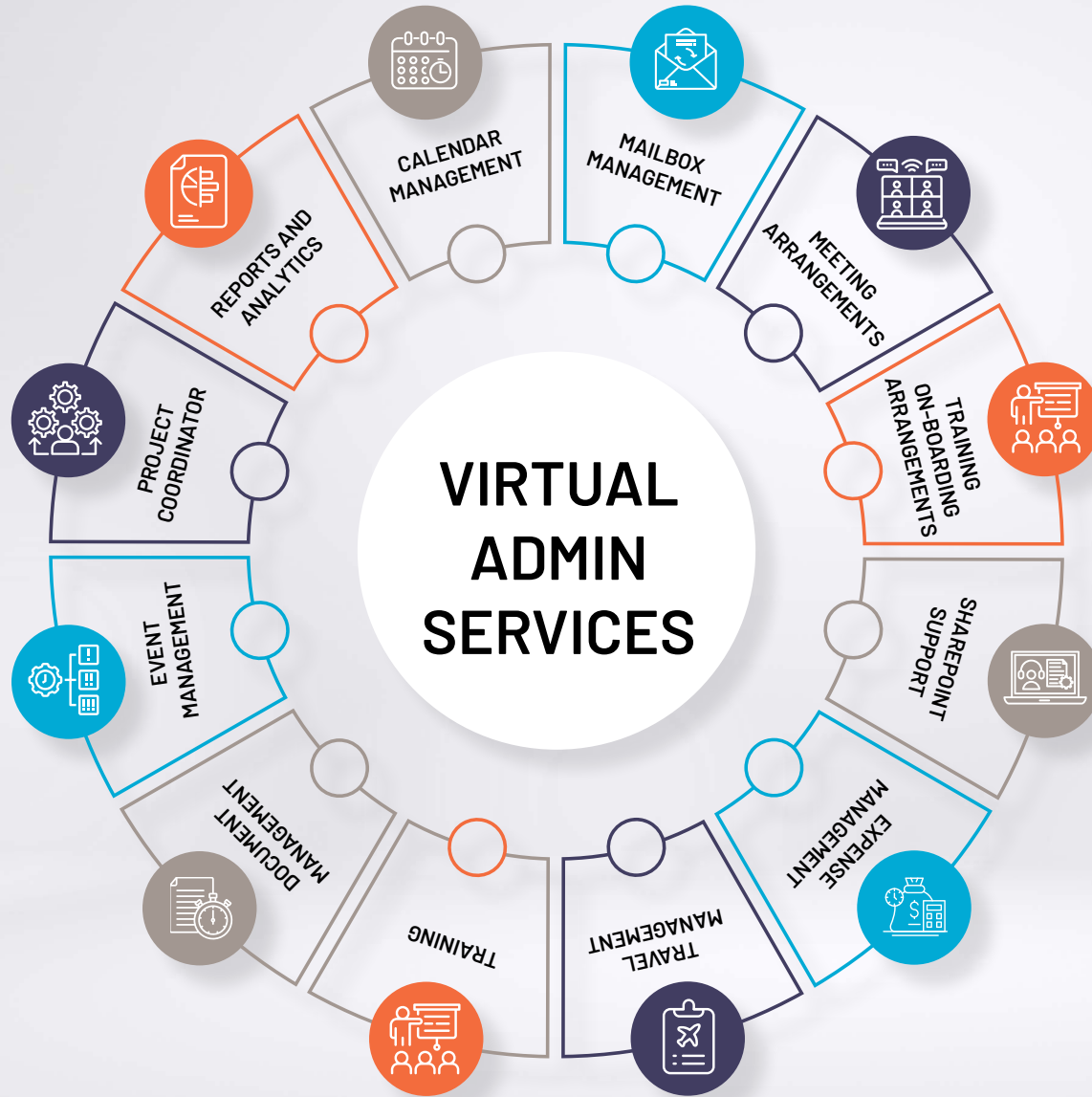
- GURU AUDITOR ● REPORTING AND ANALYTICS
- RIGHT-AWAY ● DIGITAL TECHNOLOGY AND DATA
- CENTRAL LEARNING ● CLOUD PLATFORMS INFORMATION
- CDM AUDITOR ● SECURITY



VIRTUAL ASSISTANT SERVICES



VIRTUAL ASSISTANT SERVICES



WHY VIRTUAL ADMIN?



- To resolve Administrative back-office challenges, global companies are increasingly embracing outsourcing across a wider range of front and back office to help transform their businesses. In addition to significant cost savings, Business Process Outsourcing (BPO) & Knowledge Process Outsourcing (KPO) has become a lever for driving business growth and innovation.
- With a skilled virtual administrative assistant, it totally can. Your admin VA can handle a gamut of recurring tasks you're currently taking on yourself, leaving you with more hours in a day. Use this time to focus on things that actually matter to your company's growth.

The added value Pena4 brings:

- Our clients benefits from Pena4s Virtual Assistance Service offering using a consistent methodology, expertise, economies of scale and cost reductions.
- Virtual Assistance Service offering executes your business strategy by composing a tailored roadmap, assigning the right tools and developing the ideal performance indicators, goals, balanced scorecard, metrics, reporting, planning and resources. This ensures:
 - Budget alignment
 - Timely realization of milestones
 - Scope control
 - Improved control and reporting
 - Compliance

TRANSITION PLANS

DISCOVER



Virtual Admin support Services
 Digital Content Services
 Staffing Services
 Other BPO Services

PLAN



Operating Model
 Integration Governance
 Roles/ Responsibilities
 Program/Project Plans
 Socialization

BUILD



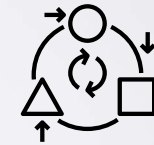
Implement Operating Model
 Implement Governance
 Execute Program/ Project Plans
 Organizational Change Management

IMPLEMENT



Implement Program/ Project Work task
 Refine Program/ Project Plans
 Organizational Change Management
 Project and Program Management & Communications

TRANSFORM



Comprehensive Collaborative approach
 Address each client's needs

STRATEGIC CONSULTING

PARTNER ECOSYSTEM - EVALUATION: RECOMMENDATION

NEED ANALYSIS

SERVICE INTEGRATION : TECHNOLOGY : RESOURCE : TOOLS

E2E - ENGAGEMENT LIFE-CYCLE SUPPORT AND ADVISORY



OUTLOOK CALENDAR

VIRTUAL ADMIN OPERATION PROCESS FLOW

Task request sent via **Email** or through **MS Teams**



The **VA** will **acknowledge** the task received and **ask** clients **if something is missing** to process



Once received, starts working on it to **achieve the deadline**



VA will keep the **client informed** on the **status of the task** if in case of delay



Sends the **deliverables** with the final status of **client's reference**



Includes:

Meeting Duration | Required Attendees | Optional attendees
Subject/ Title of the Meeting | When (Expected Date & Time) | Location
Meeting Logistics | Chairs, Tables, Flipchart, AV, VC etc.
Room Setup & Supplies | Agenda/Meeting Notes | Catering Needs etc.



New Team Member QC will be completed



Updates the task and sends the deliverables



Reviews the assigned tasks and requests for any changes required



File is Accepted





PROJECT / TASKS

VIRTUAL ADMIN OPERATION PROCESS FLOW

Task request described and sent via email or assigned over call directly to VA with TAT



The dedicated VA will read the email for instructions/ Write down instructions in notepad if the task is allocated over call



If instruction is given through call, we will write up a summary and send to client for the confirmation



VA will start working on the task and check with client for any queries



Once the task is completed, will send the task for QC



Once the QC completed will send the task to client



Review the file and requests for any changes



Updates the changes and sends the task back to client



File is Accepted



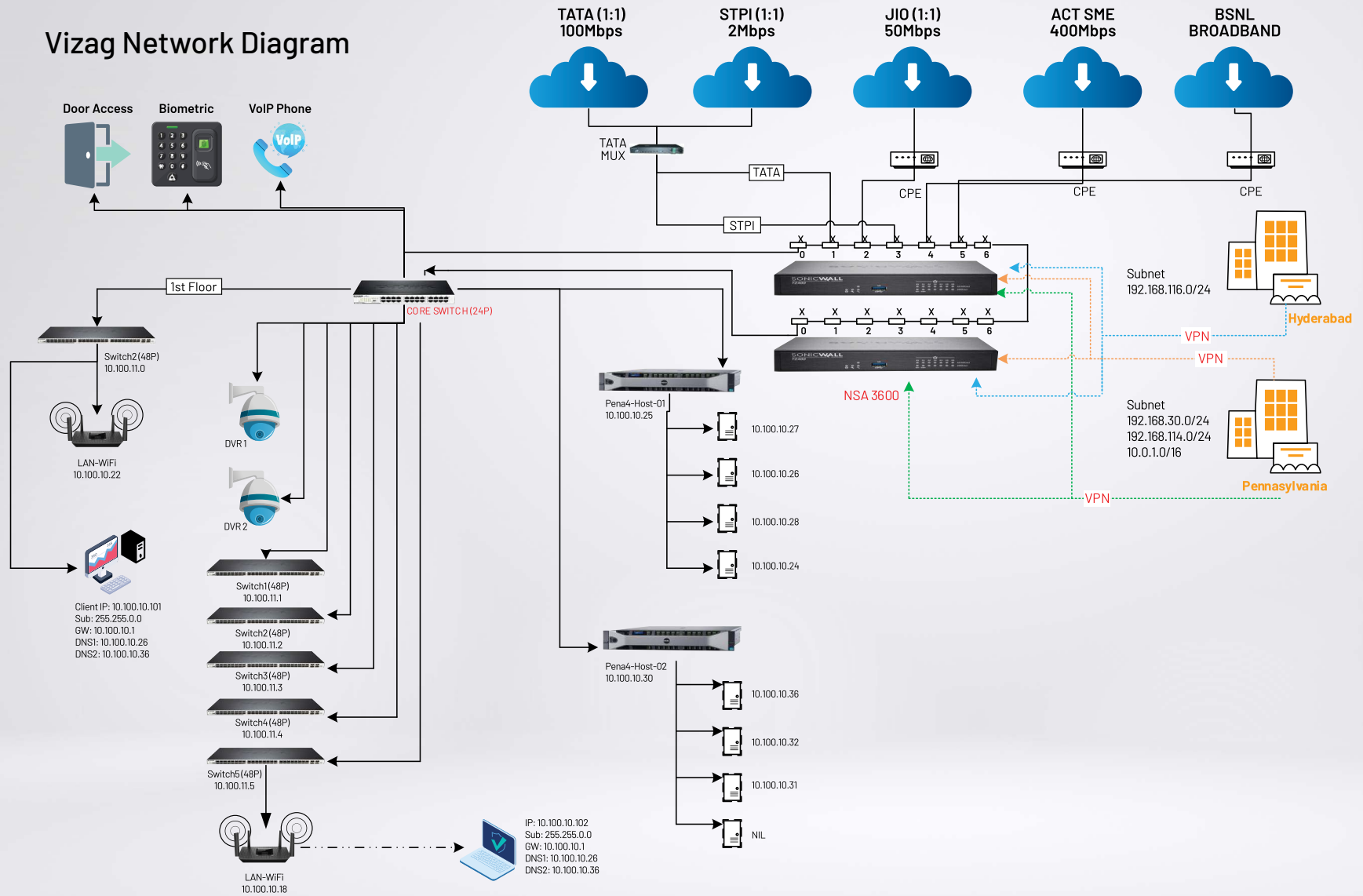
OUR IT SECURITY



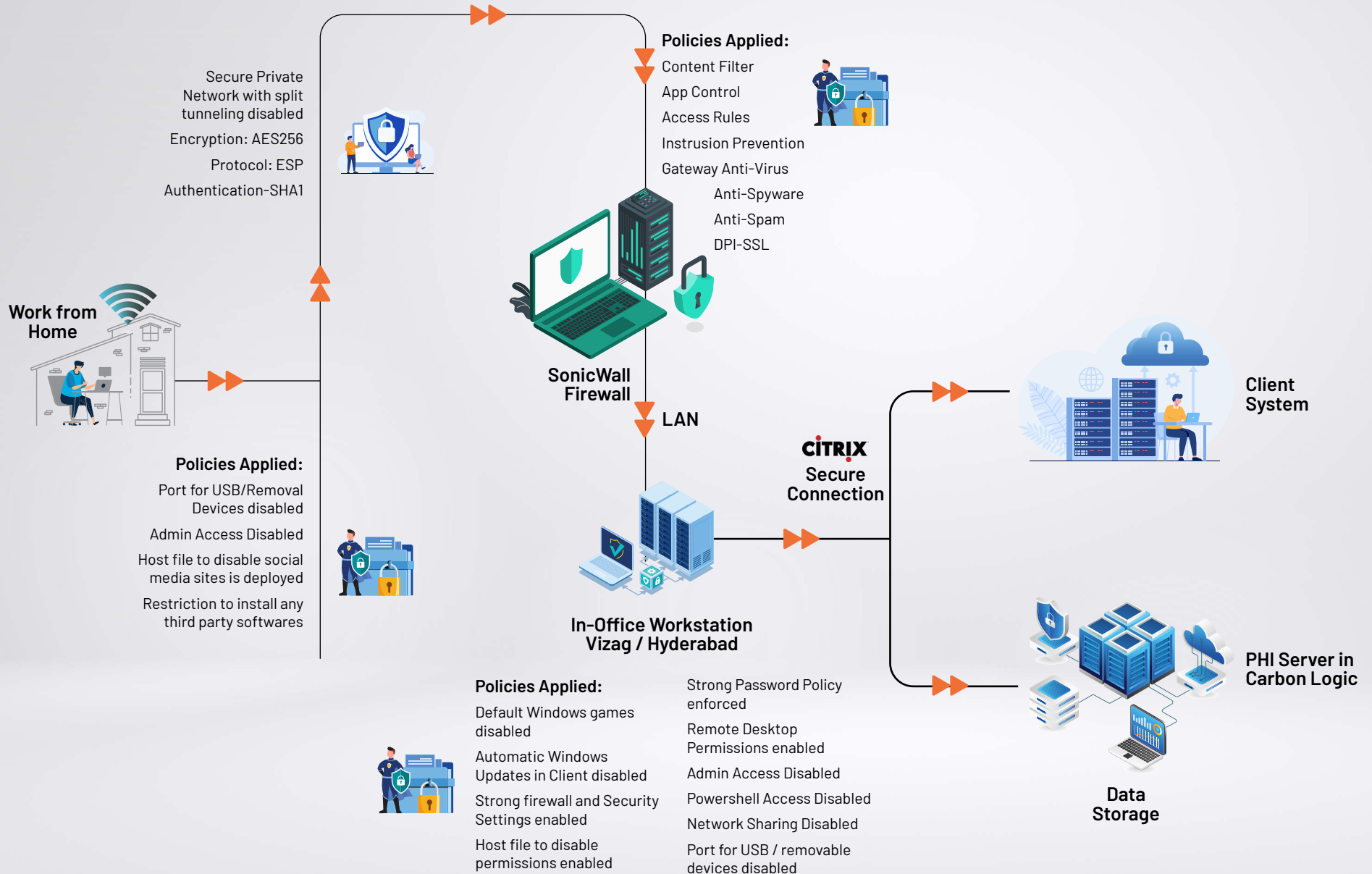
- We utilize Kaspersky Endpoint Security 10 and FortiNet for anti-virus and anti-spam.
- Policies and procedures defined with a designated Security Officer to address any potential breach in security. We had no breaches or potential breaches reported to date.
- We engage a third-party, independent firm to conduct and perform annual vulnerability assessments and scans of its environment.
- We have Business Continuity Plan and a written Disaster Recovery Plan. The plans include full redundancy, hot-swap/switch-over measures, offsite back-up of all databases and applications, etc. In addition, all Pena4 servers are co-located at a secure data center in Colorado managed by a third party. The data center undergoes annual audits and assessments (i.e. SOC2) and provide evidence of outcome and compliance to Pena4 annually.
- We use systems that meet the minimum requirements as follows –
 - **Microsoft Office:** 2016 or later and are updated as new versions become available
 - **Operating system:** Microsoft® Windows® 10 and above
 - **Processor (CPU):** 3.0 GHz Intel® i5 Processor and above
 - **Storage:** 256GB SATA/SSD @ 7200 RPM or higher
 - **Memory (RAM):** 4GB or higher
 - **Browsers:** Mozilla Firefox, Google Chrome, Apple Safari, Microsoft Edge

OUR IT SECURITY

Vizag Network Diagram

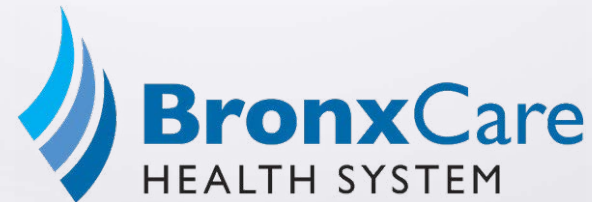


OUR IT SECURITY





OUR CLIENTS



TESTIMONIALS



"Pena4 has a very excellent turnaround time, and are always available for questions that need answered, and our very supportive of our Health System."

Lizette Portocarrero
Mount Sinai Morningside



"Pena4 team works closely with hospital management team and turns assigned work around quickly."

Daniel Cassata
Mount Sinai Brooklyn



"Established deadlines have never been missed."

Ray Cosner
Mount Sinai Health



"Always ensures we meet our coding deadlines."

Vicky Baggio
The Ottawa Hospital



"I have found the people at Pena4 very accommodating and easy to work with."

Sheryl Chapman
Nuance

EXECUTIVE TEAM



Manny Pena
CEO and Chairman



Joseph Gurrieri
President and COO



Eileen Pena
CFO and Controller



Richie Pena
VP Sales and Marketing



Joy Kulappura
VP Operations and
Corporate Affairs,
Pena4 India

