

# Office Guidebook

#### INTRODUCTION

Welcome to CanZell Realty (CR). (CanZell Realty, Inc.) This Office Guidebook does not create any employment contract or rights; rather it is presented to provide an overview of office policies, procedures and benefits for employees. It is important that you read this Office Guidebook and talk to your supervisor if you have any questions about the information it contains. Please keep this document handy and refer to it for important information about working as an employee of the Corporation.

There is a reason CanZell Realty is consistently in the Top Agents in the country. It's a philosophy about combining a sales team of professionals who are energetic, highly-trained and, simply put, the best at what they do, into a well-oiled machine in which every function is centered on our individual clients. The CanZell Difference is reflected in everything we do, from the way we interact with our clients to the way we interact with each other. We are glad you are part of our team!

Sincerely,

CanZell Realty

Name:	<del></del>	Date:
Address:		Soc. Sec. #:
City:	Zip:	Home Phone:

# **Table of Contents**

At Will Employment	
Mission Statement	
Vision Statement	
Core Values	4
New Hire Probationary Period	
Employee Confidentiality and Non-Competition Agreement	5
Performance Probation	5
Part Time Employment	6
Full Time Employment	
Expected Work Hours	7
Harassment Policy	8
Client Records	
Compensation	
Mileage Reimbursement	
Health Insurance	9
Retirement Plan	
Agent and Admin Recruitment	
Holidays	10
Paid Sick/Personal/Vacation Days (PTO)	
Maternity Leave	
Jury Duty	
Disability Leave of Absence	
Personal Leave of Absense	
Accumulation	
Use of Paid Time Off	13
Time Off Procedure/Dependability	
Unpaid Time Off	
Hours in General	
Telephones	
Empowerment	
Open Communication Policy	
Membership and Classes	
Termination	
Exit Interview	
Return of Company Property	17
Former Employees	17
Computer/Personal Phone Calls	
Zero Tolerance Policy	
Licensing	
What an Unlicensed Assistant Can and Cannot Do	23
Accuracy	24
General Office Policies	24
Reporting Safety Issues and Accidents	25
Lifting	25
Smoking	25
Criminal Record	
Drug Free Workplace Policy	
Spouses/Significant Other/Immediate Family	
Severe Weather and Emergency Conditions	26
Conflict Resolution	
Professionalism: Policy on Profanity	29
1 Totooolonanom. I olloy on I Totalilty	29
Employee Confidentiality and Non Complete Agreement	Addendum A
Sexual Harassment Policy	Addendum B

# At –Will Employment

All employees are considered "at-will employees." This means that the employee can terminate his or her employment at any time and, conversely, the Corporation can terminate the employee's employment at any time, with or without cause and with or without notice.

Print Name of Employee		CANZELL REALTY
		Bv:
Employee	Date	Authorized Agent Date

#### **MISSION STATEMENT:**

To glorify God by putting our clients' interests above our own.

# **VISION STATEMENT:**

To change the lives of the communities we serve through abundant giving.

# **CORE VALUES:**

- 1. Think win/win
- 2. Be A Go Getter.
- 3. Follow Up & Follow Through.
- 4. Address Issues Head On.
- 5. Do The Right Thing.
- 6. Let Your Yes Be Yes, and Your No Be No.
- 7. Drive the bus and land the plane

Starting Wage: \$	(Salary) which comes	out to \$	per hour.
		Pay Structu	re
Hours of Operation: 8:0	00 a.m. – 9:00 p.m., Monda	y through Su	ınday
Proposed Start Date:_		-	
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#### **New Hire Introductory Period**

All new employees will be in a New Hire Introductory Period for the first three (3) continuous months (90 days) of active employment. This is a formal evaluation period of a new hire's or employee selected for a new job with a different project/position the ability to demonstrate their competence to perform the duties and responsibilities of their job. This period provides a reasonable time for the new employee to demonstrate his/her ability to perform the duties of the position and to determine whether the employee is able to meet the standards and expectations of the job. During this time, management appraises the employee's aability to learn and perform job duties;

- Quality of work
- Productivity
- Work habits
- Cooperation
- Attendance
- Punctuality
- Other standards and expectations specific to the employee's work situation

If the employee is clearly not meeting the requirements of the job, the employee may be released at any time during the probationary period.

# **Employee Confidentiality and Non-Competition Agreement**

Please see the Employee Confidentiality Agreement and Non-Compete.

#### **EMPLOYMENT INFORMATION**

#### **Performance Probation**

An employee may be placed on Performance Probation at any time. This type of probation is intended to place an employee on notice of his/her performance problems that needs to be corrected within a specific length of time. The employee will be assessed during this period and may be terminated if performance requirements are not being met.

# **Temporary Employees**

Temporary employees are hired for a limited or certain period of time based upon the needs of the company. The time period of the employment and the working schedule will be discussed between the employee and supervisor at the time of hire and the agreed-upon schedule shall be maintained in the Corporation's human resources files. Hours are subject to change dependent on the circumstances of the employee and the needs of the Corporation.

# **Part-time Employees**

Part-time employees are hourly wage earners who work less than 30 hours per week on average. The hours and days a part-time employee works are discussed between the employee and supervisor at the time of hire and the agreed-upon schedule shall be maintained in the Corporation's human resources files. Hours are subject to change dependent on the circumstances of the employee and the needs of the Corporation.

#### **Full-Time Employees**

Full-Time Employees are employees who work at least 30 hours per week. Full-time employees can either be salaried or paid on an hourly basis.

The work week consists of 40 hours. For record keeping purposes, the week begins at 12:01 a.m. on Monday and at midnight Sunday. The pay period is paid bi-monthly.

For full time employees, employee earns PTO as seen in the chart on page 10. Accumulated PTO leave over the maximum carried amount is deleted in the pay cycle of the first of the year.

ADP is the vendor contracted to record hours worked, leave taken, and overtime hours worked (if applicable) for all employees who are to receive a paycheck that pay period. All employees, including officers, must accurately report all hours worked, leave taken, overtime worked, etc. to ADP.

The employee's manager or supervisor must:

- 1. Review the leave recorded for accuracy
- 2. Approve accurately reports from ADP
- 3. Maintain a continuous leave record through ADP

Matthew 6:24 – "No one can serve two masters."

The welfare of our employees is paramount to our success. Therefore, CR requires that before accepting any outside employment or outside business activity, that you discuss the matter with your supervisor or an officer of the company.

If an employee is thinking about accepting an outside business activity[1], then CR expects that employees would take partnership with his or her manager to discuss their intentions. Managers are expected to engage in this dialogue with their team members and be supportive where possible.

At no time are employees allowed to have a conflicting outside interest. Employees agree that during their employment with CR, they will not plan or engage in any other employment, occupations, consulting, or other business activities or commitments that are competitive with or directly relate to CanZell Realty's business. In addition, employees shall not engage in any activities that conflict with any employment obligations to CR.

Employees represent that they have no other commitments that would hinder or prevent the full performance of their duties as an employee of CR or their obligations under this agreement. Employees agree not to enter into any such conflicting agreement during the tenure of their employment with CR.

All employees authorize CR at its discretion to notify others, including any future employers the employee may have, of the terms of this agreement and the employee's responsibility under it.

Employees who wish to participate in an outside business activity are required to obtain written approval from their manager before participating in any outside business activity. Managers should consult with HR when deciding about the approval of outside activities.

In general, outside business activities are not allowed when, for:

Full-Time Employees: the outside business activity will regularly require the CR employee to dedicate more than 6 hours per week and the outside activity is in direct

competition and/or relation to the business of CR and/or the work the employee does for CR.

Part-Time Employees: the outside business activity will regularly require the CR employee to dedicate more than 20 hours per week and the outside activity is in direct competition to the business of CR.

[1] For the purposes of this policy, an outside business activity includes, but is not limited to: another job with any other employer; a side business in which the employee is holding themselves out to the public as such; volunteer work that occurs on a regular basis; or any other outside commitment (other than family) in which the employee is making a regular time commitment of more than 1 hour per week.

#### **Expected Work Hours**

Salaried Exempt Employees: As an exempt employee, you will be paid on a salary basis. You're required to work the minimum hours per the breakdown below and any extra needed to get your job done. You are exempt from overtime. There are a couple exceptions to this rule, though. Suppose you've already used up all your vacation and sick time, and then one morning you fall down and twist your ankle. You can't drive, so you miss a few more days at work. Since you haven't got any leave left, your wages can be reduced for the extra days you missed.

Hourly Non-Exempt Employees: As a non-exempt, hourly employee, you are paid on a per hour basis, for the hours that you work. You are required to work the minimum number of hours per the breakdown below. If you need to work additional hours to complete your job, you must have your Manager's approval to work additional hours. Hourly employees are required to clock in and out when arriving at work and leaving for the day. Hourly employees are also required to clock out and then back in when leaving and returning from lunch.

Tier	Hour Breakdown	Example
Admin	40 Hours Total 40 hours – In Office Hourly position does not require any work from home hours.	<ul> <li>Transaction Coordinator</li> <li>Branch Office Administrator</li> <li>Videographer</li> <li>Social Media Assistant</li> <li>Inside Sales Agent</li> </ul>
Manager	45 Hours Total 38 hours – In Office Additional Hours – Home (Salaried Position) For the first 6 months, you will be required to	You MUST be in the Admin tier <u>6 months</u> before gaining approval to move to this tier  • Director of Web Development  • Director of Accounting  • Director of HR & Training

	work 40 hours in office and 5 from home. Once approved by management you will move to 38 hours in office and 7 at home	<ul> <li>Training Manager</li> <li>Executive Assistant to Chantel Ray</li> <li>Sales Manager</li> <li>Director of Inside Sales</li> <li>Director of Media</li> <li>Director of Creative Services</li> <li>Managing Partner</li> <li>ISA Manager</li> </ul>
Brokers/AMP	30 Hours Total 30 hours – In Office Additional Hours – Home	<ul><li>Managing Broker</li><li>Principal Broker</li><li>Assistant Managing Partner</li></ul>
Executive	45 Hours Total 35 Hours – In Office Additional Hours – Home	You MUST be in the management level for  1 year minimum  Chief Business Development Officer Chief Operations Officer Chief Executive Officer President Chief Marketing Officer Chief Communications Officer Chief Human Resources Officer Chief Information Officer Chief Sales Officer Assistant Vice President

<sup>\*</sup>Please note: Only hours worked in office are logged in the timecard in ADP. Hours worked at home (unless they have prior approval from a manager) are not to be logged in the ADP timecard system.

# Management

As management your work week and pay are based on 45 hours. 38 hours has to be completed in office – unless you are managing Inside Sales Department (see above) (You cannot count your lunch as part of your 38 hours worked). The additional 7 hours can be done from home. The 38 hours in office has to be done in office and cannot be made up at home.

Please note that the first 6 months of employment, you will need to be in office for 40 hours each week and after you have passed your 6-month evaluation, you may be approved to move to 38 hours in office as stated above.

Executive level positions are required 35 hours in office (not including a lunch break) plus 10 additional hours from home based on the 45-hour work week.

If an exempt associate works any part of a day, he/she will be paid for the whole day. However, exempt associates are still required to follow the leave and attendance policies contained in the handbook. If an exempt associate needs to be absent for partial or full days due to personal reasons, the exempt associate should submit a leave request as per the policy and obtain approval prior to taking the time off. Per policy, accrued paid leave will be applied to time off taken by the exempt associate.

If the exempt associate has insufficient appropriate accrued paid leave to cover the time off as requested, personal leave may be granted at the discretion of the company. Exempt associates without accrued paid leave available will not be paid for whole days off due to personal reasons, aside from illness or disability, and will show LWOP for the day. An exempt associate without available accrued paid leave may also be asked to take the whole day off for personal reasons in this situation even though only a partial day off was originally requested, or their leave request may be denied.

It is important to note that for the first 120 days of employment, until paid leave is accrued, you may NOT work from home or remotely. Additionally, no time off or personal leave requests will be approved for the first 120 days of employment.

Any employee who is requesting to work from home beyond what is already approved in other provisions of this handbook should have their Manager's approval in writing first, and this should only be done in when it is an absolute necessity, such as inclement weather. If an hourly employee is going to work from home, employees should punch in and out as required by the handbook. In addition, hourly employees need to utilize the Time Doctor Application on their computer while they are working. When a salaried, exempt employee receives approval to work at home, no more than eight hours per day can be recorded on the employee's timecard towards their workweek total. Employees must be with the company for 90 days before work from home days can be approved.

#### **Conflicts of Interest**

A conflict of interest is any personal interest, activity or relationship which could affect a manager's judgment, loyalty or the effectiveness of his/her performance. An apparent conflict of interest may impair public confidence in the company as much as an actual conflict of interest. Our managers must not knowingly enter into situations involving a conflict of interest.

Avoid interests, relationships and transactions that are or could be seen by an impartial observer as harmful to detrimental to CanZell Realty, its reputation and its

interests. This includes, but is not limited to: all employees, vendors, contractors and agents as follows:

- You may not disclose or utilize confidential (proprietary) information. This information may be disclosed only when properly authorized.
- You are responsible for disclosing any contemplated or existing interest, activity or relationship that may impair his/her effectiveness in working for CanZell Realty. This protects your interests as well as CanZell Realty.
- The avoidance of an existing, potential or apparent conflict of interest depends on the good judgment of our management. The cautious person will carefully avoid any business relationship or investment which is likely to affect his/her service to the best interests of the company. He/she will also avoid situations in which any question might understandably be raised about the existence of a conflict of interest or which might appear to conflict with the best interests of the Company.

#### **Personal Relationships**

Members of management must avoid forming any relationships with individuals which may in a way be perceived as a conflict of interest. If a romantic relationship develops between two employees, those employees must notify HR immediately. Likewise, members of Management should take action to end any current reporting relationship that is inappropriate or a violation of this policy. Members of Management must avoid fraternizing with anyone that is not in management. The company also prohibits members of Management from having extra-marital affairs, and if the company discovers that members of Management are having extra-marital affairs, they may be terminated.

# **Harassment Policy**

The Corporation intends to provide a work environment that is pleasant, professional, and free from intimidation, hostility or other offenses which might interfere with work performance. Harassment of any sort – verbal, physical, visual – will not be tolerated. See Addendum D.

#### **Client Records**

All records pertaining to clients of the Corporation serviced by an employee, and all personnel records pertaining to compensation and expenses of an employee, are the property of the Corporation. Upon termination of employment, an employee shall not be entitled to keep or reproduce any of the Corporation's records related to any client, unless the client specifically requests that those records be transmitted to the employee.

#### COMPENSATION

#### General

An employee's current compensation, bonus rates and accounting shall be maintained in the Corporation's human resources files. The Corporation considers such information personal and confidential.

#### Mileage Reimbursement

Employees will be reimbursed for mileage for job-related driving (not to include commuting miles and breaks) at \$0.35 per mile. This reimbursement is intended to cover gas and any future wear and tear on an employee's vehicle. Employees will not be entitled to any reimbursement for mileage driven in the Corporation's vehicles. This must be recorded with the mile on the car at the start of the trip and the mileage at the end of the trip with the total miles needing to be reimbursed noted. This also must be turned in within 1 week of the job-related driving task or it is subject to denial.

#### **Health Insurance**

For all full-time employees, starting the first day of the month following 30 days from the date of new hire, if you choose to take advantage of it, we will be paying for half of your own personal health insurance if it is done through the CanZell Realty group plan. Employee's must sign up during their open enrollment periods. Temporary and part-time employees are not eligible.

#### **Retirement Plan**

For full time employees, starting immediately on your first day of work, if you choose to participate, you can receive a 100 percent employer IRA retirement plan match, up to 2 percent of your annual pay, not to exceed \$3000. Temporary and part-time employees are not eligible.

#### **Agent and Admin Recruitment**

If you recruit an admin for our staff, you will receive \$250 once they work at least one full pay period with the company. You must claim this bonus by emailing coo@canzell.com within 90 days.

Note: You must still be employed with us at the time of the bonus in order to receive it.

# TIME OFF/ LEAVE OF ABSENCE

# **Company Holidays:**

The following holidays will be paid days off (for full-time employees only, temporary and part time are not eligible ) as long as they do not fall on a Saturday

or Sunday (or do not fall on an employee's regular day off): This does not start until you have been with the company for 90 days.

Overtime is considered physical hours worked over 40 in one week. When there is a paid holiday, no one should ever be in an overtime situation.

In order to qualify for holiday pay, you must work the scheduled workday immediately before and after the holiday. Only excused absences will be considered exceptions to this policy.

If a holiday occurs during your scheduled Vacation/Sick time, you are eligible for the holiday pay and will not be deducted Vacation/Sick time. You are not eligible to receive holiday pay when you are on an unpaid leave of absence.

The following holidays are for full time administrative staff and managers.

- New Year's Day
- Memorial Day
- Juneteenth
- Independence Day
- Labor Day
- Thanksgiving Day
- Friday after Thanksgiving
- December 24th, (Christmas Eve) day
- Christmas Day
- December 31st (New Year's Eve Day)

The following holidays are for call center employees:

- New Year's Day
- Easter Sunday

- Memorial Day
- Juneteenth
- Independence Day
- Labor Day
- Thanksgiving Day
- December 24th, (Christmas Eve) day
- Christmas Day
- December 31st (New Year's Eve If a calbagner employee works any of the above company holidays, they will be paid 8 hours holiday pay and for the hours worked on that holiday. Example: you work Thanksgiving Day from 8 am noon, you get paid your hourly rate for those hours work plus the additional holiday pay for 8 hours as long as you meet the holiday pay criteria listed above.

Employees have the right to exchange any of the nine major paid holidays for any other specific religious or historic holidays (such as Columbus Day, Hanukkah, Martin Luther King Day, Passover, Yom Kippur), so long as the holiday being exchanged for does not fall on a Saturday, Sunday, or regular day off. Any request for an exchange must be in writing and made at least 30 days prior to the major paid holiday to be exchanged.

#### Paid Sick/Personal/Vacation Days (Paid Time Off)

Everyone needs a break now and then! So, to assure that employees take their well-deserved breaks in increments that are manageable by the other employees, the Corporation has devised the following policies regarding employee time off.

Rather than have separate amounts for paid sick, personal and vacation days, there is only one type of leave, which is referred to as Paid Time Off ("PTO").

#### **Maternity Leave**

Maternity leave will be use of your accrued PTO. You must have worked 2 years at CanZell Realty to qualify for this benefit. Your position will be held for 4 weeks.

#### **Bereavement Leave**

Should an employee unfortunately loose a member of their immediately family, CR will provide 3 days of Bereavement leave for the employee. If the employee wishes to take more than three days, then the time away would need to be covered by PTO or LWOP.

Our bereavement policy covers members of your immediate family, which is defined as: employee's spouse, child, father, mother, brother, sister, stepfather, stepmother, stepbrother, stepsister, stepson or stepdaughter. To be eligible for paid bereavement leave, the employee generally must attend the funeral of the deceased relative.

For the loss of a grandparent, CR will provide 1 day of Bereavement leave for the employee. If the employee wishes to take more than one day, then the time away would need to be covered by PTO or LWOP.

With the death of one of those individuals, employees are eligible for up to 3 paid days off from work; two travel days (to and from) and one day to attend the funeral.

For any other relative, you are able to take PTO or you can request an unpaid personal leave.

# **Jury Duty**

It is your civic duty as a citizen to report for jury duty whenever called. If you are called for jury duty, you must notify your supervisor within forty-eight (48) hours of receipt of the jury summons.

You must report for work if you are released from jury duty before the end of our workday or if you are temporarily released from jury duty.

# Disability (Including Pregnancy) Leave of Absence

CanZell Realty may grant an unpaid leave of absence for illness, disability, or pregnancy. To request a disability leave of absence, you should submit, or have someone submit for you, a statement of ill health or disability from your doctor. (Pregnancy is treated, for the purposes of this policy, the same as an illness or disability.) An approved disability leave may be granted for up to ninety (90) days. If necessary, you may request extensions in thirty (30) day increments for a maximum of one (1) year. Whenever possible, you are required to give as much notice as possible of your pending need for a disability leave of absence.

Employees who must remain away from work for more than the period allowed above will be considered terminated from employment. They are welcome to re-apply subject to CR's usual hiring policies.

#### **Personal Leave of Absence**

In special circumstances, CR may grant a leave for a personal reason, but never for taking employment elsewhere or going into business for yourself. You should request an unpaid personal leave of absence from your supervisor. A personal leave of absence must not interfere with the operations of your OFFICE or CR. Your supervisor will submit your request to the appropriate member of management for final approval.

A personal leave of absence may be granted for up to ten (10) days. If your leave is extended for more than ten (10) days, <u>Vacation Time and other benefits will no longer continue to accrue.</u> Consult your group insurance booklet to determine your insurance coverage during a leave of absence. Failure to return from a leave at the time agreed will result in termination of employment.

#### Accumulation

Full-time employees accrue PTO as follows:

	Begin to Accumulation Rate Accumulate		Maximum days that can be carried over at Year End
Temporary or Part- time Employee	N/A	Do not earn PTO	N/A
Full-time employee with less than 5 years of service	After 90 days	3.69 hours per bi- weekly pay period	6
Full-time employee with 5-6 years of service	N/A	5.69 hours per bi- weekly pay period	9
Full-time employee with 7-8 years of service	N/A	7.69 hours per bi- weekly pay period	12

Full-time employee with 9+ years of	N/A	9.69 hours per bi- weekly pay period	15
service			

Regardless of the above schedule, the maximum amount of paid time off that can be carried forward is up to one-half of the paid time off hours that accumulated in that year. For purposes of accumulation of PTO, years begin on January 1 and end on December 31. Employees will not be paid for any days missed in excess of the accumulated paid time off. An employee will not be paid for time off, even if scheduled and approved, unless the employee works the full week before and the full week after the approved paid time off.

If an employee is terminated by the Corporation, the employee is not entitled to payment for any accumulated but unused paid time off. Should an employee decide to quit and give the Corporation at least three weeks' written advance notice, the Corporation may pay the employee at least 50% of the accumulated but unused PTO, up to 20 hours. I understand that in order to receive any portion of my PTO or to be eligible for rehire with CanZell Realty, I must give a minimum 3 weeks' notice.

#### **Use of Paid Time Off**

Other than illness, any paid time off must be requested in advance and approved by the office manager or other company officer. Employer has the right to ask for written proof of any illness (doctor's note, e.g.) upon return to work. In November every year, the following year's calendar is made available. Once the following year's calendar is made available, it is the employee's responsibility to record PTO. No two full-time employees from the same department may take off at the same time; however, a one-day overlap is acceptable. The employee must get all requests for time off approved by management. Your manager will insure that the time is available.

The following guidelines are to be followed as proper procedure for requesting time off:

- 1. Check the Time Off Calendar to see if someone has already been approved for time off for that date.
- 2. If the date or dates you would like are available, e-mail your director supervisor via email to submit your time off request. Please include the dates that you would like to schedule.

3. Your supervisor will let you know via e-mail if your time off is approved or denied. If your time off is approved, your manager will schedule your time off on the calendar.

All requests must be made at least one business day before the requested day off. If you are requesting more than one day off, requests must be turned in at least 72 hours in advance. This is a first-come first-serve policy. If an employee wants PTO previously reserved by a co-worker, that employee will have to choose another time.

The Corporation reserves the right to allow more than one employee to take off during the weeks of Thanksgiving, Christmas, Passover, and Hanukkah.

Paid Time Off may not be used or applied to days an employee is on Probationary Suspension and/or may not be applied during that 2 week pay period.

Personal Emergencies: When an absence is due to a personal emergency (e.g., car problems, plumbing problems) and an employee has accrued PTO, PTO must be charged and the entire absence is designated as unplanned leave and if no accrued PTO is available, it will be considered Leave Without Pay.

# **PTO and Dependability**

# **Guidelines for Occurrences:**

You can receive a warning for not abiding by company policies, core values or for poor performance in your job.

#### **PTO Guidelines:**

PTO requests should be scheduled as far in advance as possible. All Associates are required to request PTO at least forty-eight hours in advance to determine business needs. Associates who are unable to report to work must call their Manager immediately upon determining that they will not be at work or at least 30 minutes before their scheduled time or whichever comes first.

#### Tardiness:

In general all associates are required to be at their work stations on time. If they arrive to their work stations after their scheduled time or return from lunches or breaks later than scheduled, the associate is considered tardy. Abusive trends or patterns, excessive unscheduled absences and tardiness or lack of adherence to department attendance and scheduling requirements may result in disciplinary action,

#### **Disciplinary Action:**

After one day of "no call, no show," an associate will be considered to have voluntarily resigned his/her position. Abusive trends or patterns, excessive unscheduled absences and tardiness or lack of adherence to department attendance and scheduling requirements may result in disciplinary action, even if all PTO time has been exhausted.

\*No more than 2 Associates will be allowed off on the same day to ensure coverage.

# What counts against your dependability? Any of the following unapproved absences

- Any leave that is not pre-approved regardless of the circumstance.
- Not returning on time for lunches and breaks
- Any time you are late for work without pre-approval
- Anytime you have to leave early for work without pre-approval
- Doctor's Notes do not constitute as an approved absence

<u>Unapproved time that count against your dependability, will be tracked hourly on your timecard.</u>

#### Attendance:

Associates will begin earning occurrences with unapproved absences. The following steps outline the performance management process.

Associates who have unapproved absences will be held accountable to the following:

You are required to keep a dependability rating of 98% or higher at all times. 40 hours used that is unapproved throughout the year puts you right at 98%; however; the following guidelines will be followed for unapproved time when you fall below 99%.

- □ 32 Hours/of unapproved time off within one calendar year: This puts you at 98.6% dependability rating and results in a Verbal <u>Documented Coaching</u>
- □ 40 Hours of unapproved time off: within one calendar year: This puts you at a 98.2% dependability rating and results in a <u>Formal Documented Coaching</u>
- 41 Hours of unapproved time off: within one calendar year: This puts you at a 98% dependably rating and results in a <u>Performance Management Plan</u>

# Any additional Unapproved Absences while on a PIP, will result in additional performance management steps and or result in termination of employment.

All occurrences will run a calendar year from January 1st-December 31st. If you have PTO available and have an unexcused absence, you can use the PTO to cover the time missed; however; it still is unapproved whether you use PTO or not. **Tardies:** 

Associates will begin earning occurrences with tardies. The following steps outline the performance management process.

- 9 Tardies within one calendar year: Verbal Documented Coaching
- 12 Tardies within one calendar year: Formal Documented Coaching
- 15 Tardies within one calendar year: Performance Management Plan

Any additional Tardies while on a PIP, will result in additional performance management steps and or result in termination of employment.

All occurrences will run a calendar year from January 1st-December 31st.

\*Please note that for extreme circumstances the board may determine at its sole discretion IMMEDIATE TERMINATION is required.

#### **Unpaid Time Off**

Once an employee has exhausted their paid time off, if the employee needs additional time off, they may apply for unpaid leave.

For personal reference:							
Enter S	Start Da	ite of er	nplo	yment			
Enter	Start	Date	of	employment	plus	six	months

#### **GENERAL OFFICE GUIDELINES**

#### **Hours in General**

The Corporation's hours of operation are Monday through Sunday, 8:00 am to 9:00 pm. Full-time employees are required to work Monday through Friday from 8:30 am to 5:00 pm, unless otherwise agreed upon with management. Call Center employees are schedule between the hours of 8 am – 9pm Monday – Sunday. Each employee has 2 fifteen-minute breaks that they can use throughout the day. You do not clock in or out for these breaks. You also have a 30-minute non-paid lunch. You must clock out then back in for lunch. We want our employees to have multiple instances where they have the opportunity to rest throughout the work day; therefor breaks cannot be stacked together; i.e., taking both fifteen-minute breaks together to take one 30-minute break. Over the course of the work day, employees should plan to take a break every two hours. For example, arrive at work and work for about two hours, then take a 15-minute rest break. Then work about another 2 hours, and then take another 15-minute rest break, and then work for about another 2 hours, and then it will be about time to leave for the day.

The meal breaks are unpaid and then 15-minute rest breaks are paid. The rest breaks are time

to quickly rejuvenate and refresh before going back to work. If an employee is going to leave the workplace premises during their rest break, the employee needs to email their Manager from their computer letting the manager know that they are leaving and then send an email when they return from break. Employees should send these emails for every rest break in which they leave the premises.

Because of our industry, we expect our employees to make sure any and all issues that need to be resolved that day are resolved before the employee leaves for the day. However, employees are not permitted to work overtime without advance approval. Further, employees are not allowed to work before they clock in or after they clock out. An employee who does so may be subject to immediate termination.

It is important that employees let their supervisor or the President of the Corporation know if they are getting overwhelmed. Stress is a good thing because it usually generates financial rewards, but it also can affect an employee's mental and physical health.

Part-time employees will only be paid for the time they work.

#### **Telephones**

All telephones will be answered "If it has to sell, call CanZell. This is \_\_\_\_, how may I help you?"

If someone asks for Chantel Ray, the answer is "She's here, but she is unavailable right now. Let me see if I can help you." This will enable an employee to obtain the nature of the call without seeming as if the employee is "screening" calls. Obviously, if Chantel Ray is not in the office, just change the response to "She's out of the office right now. Let me see if I can help you."

Calls may be recorded for quality assurance.

#### **Empowerment**

It is the philosophy of the Corporation to have empowered employees who do not use the senior members as a crutch to hold them up. It is the policy of the Corporation that should an employee have a challenge or important question, before going to a more senior employee, the employee will have two possible solutions ready.

# **Open Communication Policy**

CanZell Realty encourages you to discuss any issue you may have with a co-worker directly with that person. If a resolution is not reached, please arrange a meeting with your supervisor to discuss any concern, problem, or issue that arises during the course of your employment. Any information discussed in an Open Communication meeting is considered confidential. Retaliation against any employee for appropriate usage of Open Communication channels is unacceptable. Please remember it is counterproductive to a harmonious workplace for employees to create or repeat corporate

rumors or office gossip. It is more constructive for an employee to consult his/her supervisor immediately with any questions.

#### **Membership and Classes**

Each full-time employee who is a licensed real estate agent will be responsible for the following costs:

Biennial license renewal Continuing education class fees Quarterly MLS dues Annual dues

#### **Bonus**

All bonuses are contingent upon employee completion of approved agreements with CR. Employee agrees that Bonuses are not part of wages/salary. All Bonuses are at the discretion of management on a per month basis and typically paid 30 days following the month in which they are earned and approved by management.

Employee must acknowledge that any disciplinary actions for any reason may waive his or her bonus on a per month basis. If an employee makes a mistake that has a real financial impact cost to the company, then the company may choose to withhold a portion or all of a bonus payment in an amount equal to the cost of the mistake.

For example, if an employee makes a mistake that costs the company \$150. At the company's discretion, it may choose to withhold up to \$150 from the employee's next bonus payment in order to recoup the cost of the mistake.

#### **Termination**

Upon termination of employment, you will receive at the end of the next pay period any monies that are owed to you for time you previously worked.

WE ASK THAT YOU GIVE US A 3WEEK NOTICE. If you DO NOT GIVE 3 WEEKS' NOTICE to leave CanZell Realty, you will not receive your bonuses or be eligible for your PTO payout. In order for your resignation to be valid, it must be given to your direct supervisor in person and be in writing. The notice must specify your last day in your position. All other forms will not be accepted. This requirement exists even if an employee is transitioning to another role in the company, including transferring to an agent position.

In order to be eligible for rehire with our company, you MUST give a minimum of 3 weeks written notice.

CanZell Realty will consider you to have voluntarily terminated your employment if you do any of the following:

- 1. Resign from CR,
- 2. Fail to return from an approved leave of absence on the date specified by CR, or
- 3. Fail to report to work or call in for two (2) or more consecutive workdays.

You may be terminated for poor performance, misconduct, excessive absences, tardiness, discrimination, harassment, or other violations of CR policies. However, your employment is at-will, and you and CR has the right to terminate your employment for any or no reason.

Upon termination with the company, you are required to change your employment status with CanZell Realty on all social media and websites within 24 hours. This includes but it not limited to: Facebook, Twitter, LinkedIn, Zillow, Trulia, etc.

#### **Exit Interviews**

In a termination situation, CanZell Realty management would like to conduct an exit interview (Exit Interview Form) to discuss your reasons for leaving and any other impressions that you may have about CR. During the exit interview, you can provide insights into areas for improvement that CanZell Realty can make. Every attempt will be made to keep all information confidential.

#### **Return of Company Property**

Any CanZell Realty property issued to you, such as product samples, computer equipment, keys, parking passes or company credit card must be returned to CanZell Realty at the time of your termination. You will be responsible for any lost or damaged items. The value of any property issued and not returned may be deducted from your paycheck.

#### **Former Employees**

Depending on the circumstances, CanZell Realty may consider a former employee for re-employment. Such applicants are subject to CR's usual pre-employment procedures. To be considered, an applicant must have been in good standing at the time of their previous termination of employment with CR.

#### **Signing Contracts Policy**

Employees and agents are not authorized to sign any contract or otherwise bind CR. All contracts must first be approved through CR's legal counsel. Once approved by counsel, only Chantel Ray Finch and Heather Roemmich are authorized to actually sign a contract on behalf of CR. Employees and agents should not hold themselves out or otherwise give the impression to third-parties that they are authorized to sign any contract on behalf of CR. Any violation of this policy is cause for immediate termination.

# **Computers/Personal Phone Calls**

Computers, cell phones, and other forms of communication may be provided by the company. They are to be used only for company business, and the Corporation reserves the right to review and intercept all telephone messages, text messages, computer transmissions, and monitor use of such equipment. Use of the computers for personal reasons or breaks or chit chat during work hours may result in discipline or termination.

You understand and acknowledge that CR's e-mail system is the property of CR and that you have no expectation of privacy over your use of that system, including your CR e-mail address. Your CR e-mails are subject to monitoring and viewing by CR at any time without notice to you. Your CR e-mail address may not be used to promote non-work-related causes, create a hostile work environment, to harass others, or to promote or further any illegal activity. You may not use the CR e-mail system or your CR email address to transmit copyrighted materials, trade secrets, proprietary or confidential information without the prior express written consent of the holder or owner of such information. CR reserves the right to discipline any employee or agent who violates these rules, including termination as appropriate.

- 1. <u>Business Use</u>. The e-mail system is to be used solely for business purposes of CR and not for personal purposes of the employees. It should not contain any personal announcements outside of business.
- 2. While at work employees must exercise the same discretion in using personal cell phones as for the use of Company phones. Personal calls during the work hours, regardless of the phone used can interfere with employee productivity and be distracting to others. Cell phones are not to be carried while on the job without specific permission from management who will keep supervisors regularly informed of this permission.
- 3. Employees should make personal cell phone calls during break or lunch times to the maximum extent possible. Employees should use common sense when making or receiving personal cell phone calls at work. For example, employees should speak quietly and reserve personal or intimate details for non-work hours. Frequent or lengthy phone calls are not acceptable at any time as they may adversely affect the employee's productivity and disturb others.
- 4. Personal cell phone use, even when permitted, must never include language that is obscene, discriminatory, offensive, prejudicial or defamatory in any way (such as jokes, slurs and/or inappropriate remarks regarding a person's race, ethnicity, sex, sexual orientation, religion, color, age or disability).
- 5. Employees should turn off ringers or change ringers to "mute" or "vibrate" during work hours.
- 6. The use of cameras on cell phones during work time is prohibited to protect the privacy of the employer as well as of fellow employees.

- 7. Company will not accept any liability for claims, charges or disputes between the service provider and the employee.
- 8. Use of the cell phone in any manner contrary to local, state or federal laws will constitute misuse and could result in immediate termination.
- 9. Do not use cell phones while driving on Company business. If necessary, pull over for incoming or outgoing calls.

# Any employee who violates this policy or uses the electronic communication systems for improper purposes may be subject to discipline, up to and including termination.

#### We have a zero tolerance policy for the following actions in and around the office:

- a. Stealing includes using company time to make personal calls, sending personal e-mails, going on Facebook on company computers or while on company time
- b. Gossip talking negatively about the company with anyone in the company other than a supervisor or discussing your salary with any team members
- c. Disrespect
- d. Using your computer, phone, cell phone, tablet, etc. for personal use at your desk on company time
- e. Damage to property
- f. Lying
- g. Insubordination

Violating any of these policies will result in immediate termination.

# Licensing

Some positions require you to be licensed. If your position requires this:

- 1. You must be licensed within 30 days of hire date.
- 2. CanZell Realty will reimburse your real estate class fee after you pass the PSI and have been with our company for 30 days.
- 3. CanZell Realty will reimburse you for licensing fees and Rein fees.
- 4. Any fees or classes that are to be reimbursed, MUST be turned into accounting within 30 days of payment and MUST include proof of payment. You will be reimbursed within 30 days of it being turned into accounting.

Under Virginia law, if you are not licensed, you are not allowed to engage in the marketing or sale of real estate. For example, it is illegal for unlicensed employees to quote pricing, ask for reductions in listing prices, etc. If you are asked to perform an act and you have any doubt as to whether it is legal, contact the office manager. Unless you are a licensed agent, you are not allowed to do these tasks.

#### What an Unlicensed Assistant and Admin Can and Cannot Do

# DO'S

- 1. Perform general clerical duties, including answering the phones and <u>reading</u> information shown on the listing.
- 2. Submit listings and changes to MLS.
- 3. Follow up on loan commitments after contracts have been negotiated.
- 4. Compute commission checks.
- 5. Place signs on properties.
- 6. Act as a courier service.
- 7. Schedule appointments.
- 8. Prepare contract forms for approval of the licensee and supervising broker.
- 9. Prepare promotional materials and advertisements for approval of the licensee and supervising broker.
- 10. Assemble closing documents.
- 11. Obtain required public information from governmental entities.
- 12. Monitor license and personnel files.
- 13. Order routine repairs as directed by licensee.
- 14. May be compensated for their work at a predetermined rate that is not contingent upon the occurrence of a real estate transaction.

#### DON'TS

- 1. Show property.
- 2. Give opinions or advice on a listing.
- 3. Preview, inspect or determine (measure) the square footage of any property unless accompanied by a licensee.
- 4. Answer questions on listings, titles, financing or closings, unless to confirm that a property is listed, to identify the listing broker or sales agent and to provide such information as would normally appear in a simple, classified newspaper advertisement (location and/or address.)
- 5. Discuss or explain with anyone outside the firm a contract, listing, lease, agreement, or other real estate documents
- 6. Attend pre-closing walk-through or real estate closing unless accompanied by a licensee.
- 7. Negotiate the amount of rent, security deposit, or other lease provisions in connection with a rental property.
- 8. Represent themselves as being a licensee or as being engaged in the business of buying, selling, exchanging, renting, leasing, managing, auctioning, or dealing with options on any real estate or the improvement thereon for others.
- 9. Compensate UPLs on the basis of real estate activity, such as percentage of commission, or any amount based on listings, sales, etc.

# Accuracy

When listings are entered into MLS, you must be certain the listing is accurate. If it is inaccurate, MLS may assess a fine against the company. If an employee is responsible for an excessive number of fines, the employee is subject to discipline or termination.

#### **General Office Policies**

If you are currently working another job when you start employment with CanZell Realty, please see your manager for further explanation.

Refrigerator Policy – You are allowed to keep items in the company refrigerator Monday – Friday. It must be labeled with your name and date. Every Friday at 4pm, the fridge will be cleaned out and everything thrown away. Please remove items you do not want thrown out before 4pm on Friday.

No solicitation allowed in the office – Employees and team members are not allowed to sell any products inside of the office at CanZell Realty. This includes school fundraisers.

#### **Reporting Safety Issues and Accidents**

All accidents, injuries, potential safety hazards, safety suggestions, health, and safety related issues must be reported immediately to your OFFICE Manager. Accident reports must be made out within 1 hour of an accident if possible. If you or another employee is injured, you should contact outside emergency response agencies, if needed. If an injury does not require medical attention, an injury report must still be completed in case medical treatment is later needed and to insure that any existing safety hazards are corrected. The Employee's Claim for Worker's Compensation Benefits must be completed in all cases in which an injury requiring medical attention has occurred. Further mandatory drug testing will occur in all cases where an injury is reported.

#### Lifting

Ask for assistance when lifting heavy objects or moving heavy furniture. Bend your knees, get a firm grip on the object, hold it close to your body and space your feet for good balance. Lift using your stronger leg muscles, not your weaker back muscles.

### **Smoking**

Smoking is not allowed on CR property or grounds.

#### **Criminal Records**

In response to CanZell Realty's zero-tolerance Violence in the Workplace Policy, CR will conduct a pre- or post-employment criminal check on those applicants for positions that may involve close, unsupervised contact with the public. When appropriate,

the criminal record is checked to protect CR's interest and that of its employees and clients.

# **Drug-Free Workplace Policy**

CanZell Realty is a drug-free workplace. We expect all of our employees to be drug-free continually. Pre-employment as well as post-employment drug screens will be given.

CR is a community in which responsibilities and freedoms are governed by policies and codes of behavior, including penalties for violations of these standards as stated in your Employee Manual. CR has a standard of conduct that prohibits the unlawful possession, use, or distribution of illicit drugs and alcohol by employees on CR's headquarters and/or OFFICE sites or as a part of CR's activities. CanZell Realty will impose disciplinary sanctions on employees ranging from educational and rehabilitation efforts up to and including expulsion or termination of employment and referral for prosecution for violations of the standards of conduct. Each situation will be looked at on a case-by-case basis.

The exception to this is when we have a company sponsored event by upper management, happy hours and lunches, there may be alcohol served and employees will be allowed to participate if they choose.

# **Spouses/Significant Other/Immediate Family Member Employment**

Should your spouse, significant other, and/or immediate family member accept employment with a CanZell Realty competitor, CanZell Realty reserves the right to terminate your employment.

Should your spouse be employed with a CanZell Realty competitor, CanZell Realty reserves the right not to hire you or to terminate your employment.

# **Severe Weather and Emergency Conditions**

It is important to remember that CR's responsibility is to serve our customers. So, in the event of severe weather conditions or other emergencies, the CEO/PRESIDENT and Director of Human Resources will decide whether or not to close any CR location. They will also determine the specific time to be closed if different than the normal time the location opens.

#### **Conflict Resolution**

Our goal when handling a difficult client is for them to tell us "thank you so much" at the end of the call...when you have that perspective you get a lot accomplished

#### **Step One: Adjust Your Mindset**

Once you're aware that your client is unhappy then your first priority is to put yourself into a customer service mindset.

This means that you set aside any feelings you might have that the situation isn't your fault, or that your client has made a mistake, or that he or she is giving you unfair criticism.

All that matters is that you realize that your customer or client is upset, and that it's up to you to solve the problem. Adjust your mindset so that you're giving 100 percent of your focus to your client, and to the current situation.

# **Step Two: Listen Actively**

The most important step in the whole of this process is listening actively to what your client or customer is saying - he wants to be heard, and to air his grievances.

Start the dialogue with a neutral statement, such as, "Let's go over what happened," or "Please tell me why you're upset." This subtly creates a partnership between you and your client, and lets him know that you're ready to listen.

Resist the temptation to try to solve the situation right away, or to jump to conclusions about what happened. Instead, let your client tell you his story. As he's talking, don't plan out what you're going to say when he's done - this isn't active listening!

Also, don't allow anything to interrupt this conversation. Give your client all of your attention.

#### **Step Three: Repeat Their Concerns**

Once he's had time to explain why he's upset, repeat his concerns so you're sure that you're addressing the right issue. If you need to, ask questions to make sure that you've identified the problem correctly.

Use calm, objective wording. For example, "As I understand it, you are, quite rightly, upset because we didn't deliver the samples that we promised you last week."

Repeating the problem shows the customer you were listening, which can help lower his anger and stress levels. More than this, it helps you agree on the problem that needs to be solved.

#### **Step Four: Be Empathic and Apologize**

Once you're sure that you understand your client's concerns, be empathic. Show her you understand why she's upset.

And, make sure that your body language also communicates this understanding and empathy.

For example, you could say, "I understand why you're upset. I would be too. I'm very sorry that we didn't get the samples to you on time, especially since it's caused these problems."

# **Step Five: Present a Solution**

Now you need to present her with a solution. There are two ways to do this.

If you feel that you know what will make your client happy, tell her how you'd like to correct the situation.

You could say, "I know you need these samples by tomorrow to show to your own customers. I will call our other clients to see if they have extras that they can spare, and, if they do, I'll drop them off at your offices no later than 5:00pm this evening."

If you're not sure you know what your client wants from you, or if they resist your proposed solution, then give her the power to resolve things. Ask her to identify what will make her happy.

For instance, you could say, "If my solution doesn't work for you, I'd love to hear what will make you happy. If it's in my power I'll get it done, and if it's not possible, we can work on another solution together."

#### Step Six: Take Action and Follow-up

Once you've both agreed on a solution, you need to take action immediately. Explain every step that you're going to take to fix the problem to your client

If she has contacted you by phone, make sure that she has your name and contact details. This gives her a feeling of control because she can get hold of you again if she needs to.

Once the situation has been resolved, follow up with your client over the next few days to make sure that she's happy with the resolution. Whenever you can, go above and beyond her expectations. For instance, you could send her a gift certificate, give her a great discount on her next purchase, or send her a hand-written apology.

#### **Step Seven: Use the Feedback**

Your last step is to reduce the risk of the situation happening again.

If you haven't already done so, identify how the problem started in the first place. Was there a bottleneck that slowed shipment? Did a sales rep forget to confirm an order?

Find the root of the problem and make sure it's fixed immediately. Also, ensure that you're managing complaints and feedback effectively, so that you can improve that way that you do things.

# **Further Tips:**

- It's important to handle difficult customers professionally. Learning how to stay calm and how to stay cool under pressure can help you get through challenging situations with grace and professionalism.
- If your client is especially angry, then talk slowly and calmly, and use a low tone of voice. This will subtly help lower the tension and ensure that you don't escalate the situation by visibly getting stressed or upset yourself.

- If your client has sent you a difficult email or they're angry with you over the phone, then offer to meet with him or her in person if you can to address the problem. This will not only diffuse anger (since it's harder for most people to get truly angry face to face) but it also shows that you genuinely want to address and fix the situation.
- If you feel that your client is being unreasonable, you might start to get upset, especially if he or she is criticizing you, or your organization, unfairly. So learn anger management skills so that you can stay calm in these situations.
- Occasionally a client or customer may become verbally abusive towards you or your team. Know in advance what you'll tolerate, and what you won't. If things escalate, you may need to be assertive and stand up for yourself, or even walk away from the situation to give the client time to cool down.
- People in your team might be the ones on the "front line" when it comes to dealing with difficult customers. Make sure that they know how to engage correctly in emotional labor. (This means that they should know how to manage their own emotions when dealing with difficult people.)
- Work on improving your conflict resolution skills. These skills can help you if you need to negotiate with your clients.

#### **Professionalism: Policy on Profanity**

 When representing Canzell Realty, staff and agents should act and behave appropriately. Team members should choose to act in a manner which presents a professional image to the public and is respectful of others, therefor profanity is prohibited. This includes what is spoken in our offices, to our clients and team members and what is posted on social media. Use of profanity is neither professional nor respectful to co-workers and clients and will not be tolerated.

NOTICE: ALL PHONE, EMAIL AND ALL CORRESPONDENCE ARE RECORDED.

### **ACKNOWLEDGMENT OF RECEIPT**

I am in receipt of the CanZell Realty Guidebook and have taken the opportunity to read it and ask any questions I may have. Furthermore, I understand that the CanZell Realty Guidebook is not an employment contract and no employment rights are

By signature below, of employment lister		ledges having read and understood all the terms
Print Name of Empl	oyee	CANZELL REALTY
Employee	Date	By: Authorized Agent Date

created there within, and the Corporation has the right to amend this guidebook from time

to time.

#### Addendum B

#### **CanZell Realty Sexual Harassment Policy**

CanZell Realty's position is that sexual harassment is a form of misconduct that undermines the Integrity of the employment relationship. All employees/agents have the right to work in an environment free from all forms of discrimination and conduct which can be considered harassing, coercive or disruptive, including sexual harassment. Anyone engaging in harassing conduct will be subject to discipline, ranging from a warning to termination.

What is sexual harassment? Sexual harassment Is defined as any unwanted physical, verbal or visual sexual advances, request for sexual favors and other sexually oriented conduct which is offensive or objectionable to the recipient, including but not limited to: epithets, derogatory or suggestive comments to an individual or in front of an individual about someone else, slurs or gestures and offensive posters, cartoons, pictures, jokes or drawings.

What is not sexual harassment? Sexual harassment does not refer to occasional compliments of a socially acceptable nature. It refers to behavior that is not welcome that is personal, offensive, that debilitates morale and that, therefore, interferes with work effectiveness.

What should you do if you are sexually harassed? If you feel that you have been the recipient of sexually harassing behavior, report it immediately to the owner of CanZell Realty or other supervisor. It is preferable to make a complaint in writing, but you can accompany or follow up your written complaint with a verbal complaint.

If your supervisor is the source of the harassing conduct, report the behavior to that person's supervisor or the owner of CanZell Realty, Inc.

Your identity will be protected and you will not be retaliated against for making a complaint.

What happens after a complaint is made? Within 1 day a written complaint is made, a supervisor or other person designated by the owner will investigate the complaint. The person will speak with possible witnesses and will speak with the person named in your complaint. Your anonymity will be protected to the extent possible.

Depending on the complexity of the investigation, you should be contacted within 5 days about the status of your complaint and whether action is being taken.

By signing this form, you agree that these policies have been explained to you and that you understand this policy and will abide by it at all times.

Signature/Print	Name	Date