



EMPLOYEE MANUAL

**COMPUTER PACKAGES INC.
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Rockville, MD 20850
(301) 424-8890**

At Computer Packages Inc., our mission is to be the most trusted partner in safeguarding our clients' Intellectual Property (IP) assets with innovative IP management software and annuity services.

The following employment policy and employee benefits represent those currently in effect at Computer Packages Inc. (CPI). CPI reserves the right to update and or revoke policies or benefits.

For any questions, comments or to report any misconduct related to Computer Packages Inc., please feel free to use the following methods:

- Email HR@computerpackages.com
- Use the 'Report Feedback' tab which is located on both the CPI Intranet (intranet.computerpackages.com) and Main Website (www.computerpackages.com)

Employee Manual is NOT to be intended, considered, or construed as any type of contract.

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I. EMPLOYMENT POLICY

A. Office Hours

Each employee is expected to work an 8-hour day, exclusive of lunch and non-work activities. Normal business hours are from either 8:30 - 5:00 or 9:00 - 5:30, which includes a half hour for lunch. Any deviation of these hours must be approved by the head of the department.

B. Payroll

CPI employees are paid semi-monthly. Paydays are the 1st and 16th of each month. If the normal pay date falls on a Saturday, paychecks will be issued on Friday. If the normal pay date falls on a Sunday, paychecks will be issued on a Monday. If the normal pay date falls on a holiday, employees will be paid on the last workday before the holiday.

Full-time salaried employees are paid for the two weeks worked prior to each pay period. Hourly employees are paid for the hours they actually work, exclusive of lunch and non-work activities.

C. Sick Leave/Doctor Appointments

Pursuant to the new Maryland law, Montgomery County law and CPI's leave policy, employees are entitled to earn sick and safe leave up to a maximum of 56 hours per year. Employees will be awarded fifty-six (56) hours of paid/unpaid sick leave at the beginning of each year. The year commences on January 1st and ends on December 31st. The terms under which employees are permitted to use this leave are set forth below. Employees are not permitted to carry over any unused leave at the end of the year.

Employees will not be paid for any unused sick and safe leave upon termination of employment. If an employee leaves employment and is rehired within 37 weeks of leaving, any earned and unused sick leave that the employee had at the time of separation will be reinstated.

Leave Usage

Sick/safe leave is accrued for a total of 56 hours per year, per employee. Unused sick leave is not bridged from year to year. Each employee is allowed to use sick and safe leave under the following conditions:

- To care for or treat the employee's mental or physical illness, injury or condition
- To obtain preventative medical care for the employee or the employee's family member
- To care for a family member with a mental or physical illness, injury or condition 1

- For maternity or paternity leave (note, CPI's maternity leave policy will remain the same and will not be impacted by sick leave laws.
- The absence from work is necessary due to domestic violence, sexual assault or stalking committed against the employee or the employee's family member and the leave is being used: (1) to obtain medical or mental health attention; (2) to obtain services from a victim services organization; (3) for legal services or proceedings; or (4) because the employee has temporarily relocated as a result of the domestic violence, sexual assault or stalking.

“Family member” includes a spouse, child, parent, grandparent, grandchild, sibling or legal guardian.

If the need to use sick and safe leave is foreseeable, the employee must provide notice 7 days prior to leave use. Notice must be given to employee's supervisor, in writing. If 7 days notice is not possible then notice should be given as soon as practicable.

A request for earned sick and safe leave may be denied if the employee fails to provide proper notice and the employee's absence will cause a disruption to the employer.

Employees may only use earned sick and safe leave for one of the listed authorized reasons. Employees using earned sick and safe leave for unauthorized purposes or who have demonstrated a pattern of abusing sick and safe leave may be denied the right to use earned sick and safe leave in the future.

If an employee uses sick and safe leave for more than two consecutive scheduled shifts, the employee must provide verification that the leave use was appropriate. (for ex., a doctor's note).

Statement of Earned Sick and Safe Leave

Employees will be provided with a statement of leave used and available leave via a secure portal on our Intranet.

Notice

An employer is required to notify its employees that the employee is entitled to earned sick and safe leave along with an explanation of how earned sick and safe leave accrue and the purposes for which the leave may be used. Maryland law prohibits an employer from taking adverse action against an employee for exercising their rights under this law as well as prohibits an employee from making a complaint, bringing an action or testifying in an action in bad faith.

The Commissioner of Labor and Industry has oversight of issues related to earned sick and safe leave. The Commissioner may be contacted at ssl.assistance@maryland.gov.

D. Emergency Closing

If for some emergency reason the office must be shut down, you may dial the main number, 301-424-8890, and a message will be on the main line. In all other circumstances, assume that the office is open.

E. Code of Conduct

CPI and its employees must, at all times, comply with all applicable laws and regulations. CPI will not condone the activities of employees who achieve results through violation of the law or unethical business dealings. This includes any payments for illegal acts, indirect contributions, rebates, and bribery. CPI does not permit any activity that fails to stand the closest possible public scrutiny.

All business conduct should be well above the minimum standards required by law. Accordingly, employees must ensure that their actions cannot be interpreted as being, in any way, in contravention of the laws and regulations governing CPI's operations.

Employee's uncertain about the application or interpretation of any legal requirements should refer the matter to their supervisor, who, if necessary, should seek appropriate legal advice.

General Employee Conduct:

CPI expects its employees to conduct themselves in a businesslike manner. Drinking, gambling, fighting, swearing and similar unprofessional activities are strictly prohibited while on the job.

Employees must not engage in sexual harassment or conduct themselves in a way that could be construed as such, for example, by using inappropriate language, keeping, or posting inappropriate materials in their work area, or accessing inappropriate materials on their computer.

Conflicts of Interest:

CPI expects that employees will perform their duties conscientiously, honestly, and in accordance with the best interests of CPI.

F. Diversity and Equal Opportunity

CPI is a global company, and wherever we operate, and across every part of our business, we strive to create an inclusive environment which embraces difference and fosters inclusion. We believe that valuing diversity and inclusiveness is a competitive differentiator enabling us to achieve our vision to create unmatched value for our customers and colleagues.

CPI embraces and supports our employees' differences in age, ethnicity, gender, gender identity or expression, language differences, nationality or national origin, family or marital status, physical, mental and development abilities, race, religion or belief, sexual orientation, skin color, social or economic class, education, work and behavioral styles, political affiliation, military service, caste, and other characteristics that make our employees unique.

In respecting and valuing the diversity among our employees, and all those with whom we do business, managers and employees are expected to ensure that there is a work environment free of all forms of discrimination and harassment.

Managers Responsibilities

- Implementing this Policy as part of their day-to-day management of employees and in applying policies and practices in a fair and equitable way.
- Recognizing unacceptable behavior and taking immediate appropriate action.

Employees Responsibilities

- Implementing this Policy in their day-to-day work and their dealings with colleagues and customers.
- Notifying their supervisor or senior management of any concerns with regard to the conduct of other employees. There is a portal on the Intranet under 'Report Feedback' whereby employees may report issues.

Equal Opportunity

Candidacy for employment or advancement is based solely on the relevant qualities the candidate would bring to the job position. Equal opportunity extends to all aspects of the employment relationship, including but not limited to hiring, promotions, training and development, working conditions, compensation and benefits. All such decisions are made by using objective standards based on the individual's qualifications as they relate to the particular job.

II. EMPLOYEE BENEFITS

A. Medical Insurance

CPI pays the entire premium on a health, dental and vision insurance plan for all of its full time employees, their spouses and children once they have been with the company for 30 days. Employees are encouraged to take advantage of the coverage available.

B. Vacation Leave

The paid vacation leave policy of CPI is as follows:

<u>Length of Service</u>	<u>Annual Vacation Leave</u>
1st year	10 days vacation
2nd year	10 days vacation
3rd year	10 days vacation
4th - 9th year	15 days vacation
10th year	20 days vacation

Full-time and part-time employees must work at CPI for at least six months before they are entitled to take an entire week of leave with pay. Vacation is accrued on a monthly basis.

No more than 3 weeks of leave should be taken consecutively.

Part-time employees are paid for their average work week during their vacation leave (i.e. an employee who normally works 30 hours a week during the year will be paid for 60 hours (2 weeks of 30) vacation leave).

The procedure for taking vacation leave is as follows:

- a. Clear the leave (vacation) with your supervisor as early as possible. Team Leaders and Department Heads are responsible for ensuring their team is sufficiently staffed at all times and preventing a situation where too many team members are on leave at once.
- b. After it is approved, submit it through the vacation leave submission form from the CPI Intranet.
- c. Remind your supervisor of leave the last work day before you will be taking off.

C. Holidays

Each year, employees of CPI are paid for the following holidays when the office is officially closed: New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving and the following Friday, and Christmas. (7 days)

D. Snow Days

CPI does not give time off due to weather conditions. If an employee misses work because of weather, it will be charged to vacation. It may be determined that missed work can be made up during the week, or that remote work is permitted.

E. Maternity Leave

CPI allows six weeks (30 days) of paid leave to the mother. In addition, either parent can use accrued leave time or take leave without pay for up to 12 weeks of total leave. CPI will guarantee the parent's position within the company for up to 12 weeks from the beginning of the leave. The same applies when adopting a child.

F. Retirement Plan

CPI contributes 5% of an employee's annual gross earnings up to \$40,000 and 9.3% of earnings over \$40,000 to the Retirement Plan after the employee has been with the company for one year from the start date of the plan. An employee must work 1,000 hours in any given year before he/she is eligible for a pension contribution.

The vesting schedule is as follows:

No vesting prior to 2 years of
service 20% after 2 years
40% after 3 years
60% after 4 years
80% after 5 years
100% after 6 years

Fidelity manages the Plan and sends a semi-yearly statement to each individual employee showing the amount contributed on their behalf and interest earned during the year.

G. 401k Plan

CPI also offers its employees the option of participation in a 401k retirement plan. The 401k plan allows individuals to set aside a portion of their pay before taxes for their retirement. The plan is open to join each January, April, July and October. You may also change the amount of your contribution and the investment option at these times. You must have 6 months of service with Cpi and will then be eligible with the next quarterly open enrollment.

The annual amount that any employee may contribute (per Federal Law) to their 401k is a maximum of \$19,500.00 for the year 2021. There is also a "catch-up" contribution of an additional \$6,500.00 if you are 50 years or older, making the maximum contribution \$26,000.00 if you are 50 years or older.

H. Bonus Program

A supervisor may recommend a bonus for a member of their team to the head of his/her department. This would be based on outstanding performance and/or special achievements.

I. Tuition Reimbursement

CPI will pay for a full-time employee's college tuition after they have been employed by the company for six months, provided that the course(s) taken relates to their position within the company. The tuition amount reimbursed will not exceed the tuition cost of the Maryland University school system or other local state school systems. Permission to take the course must first be approved by the employee's department head (not their immediate supervisor) and then by the Managing Director.

CPI will pay for one college class per semester. We encourage employees not to take more than one class per semester. Employees must give 5 days notice to receive a check for payment of classes.

CPI will pay the complete cost of tuition at the beginning of the semester. A grade of "C" or higher must be achieved by the employee. If a letter grade of "C" or higher is not earned, then the employee is responsible for reimbursing CPI for the amount it paid at the start of the semester.

CPI does not pay for textbooks, supplies, late fees or other non-tuition expenses.

J. Exercise Program

CPI pays for the cost of membership in the exercise program at the Rockville Municipal Swim Center for its employees. The time used for this exercise program must be made up that same day. The employee may make it up by coming in early, working late or a combination of both.

The building management in Rockville offers free gym membership if certain criteria is met.

CPI will not fund individual health club memberships for the Rockville office. Remote locations may take advantage of this offer on an individual basis.

There is a fixed cost for individual membership, so employees are asked to sign up for the Exercise Program only if they intend to make regular use of it.

III. GENERAL INFORMATION

A. Accounting and Expenses

Any questions concerning Accounts Payable or Accounts Receivable should be directed to Accounting Director. Reimbursement of petty cash expenditures should also be directed to Accounting Director.

Expenses with receipts should be submitted to Accounting Director immediately upon your return from a business-related trip. CPI's mileage allowance is .57.5 cents per mile.

B. Directions to CPI

From Interstate 270 South

Follow I-270 North. Take Exit 4 onto MD 189 North (Falls Rd.) Keep going straight as street name changes to Maryland Ave. Turn left onto E. Jefferson St. Take 1st right onto S. Washington St. Address is one and a half blocks on the right.

From Interstate 270 North

Follow I-270 South. Take Exit 6 and turn left onto MD Route 28 East (Montgomery Ave.) Turn left onto S. Washington Street. Address will be one and a half blocks on the right From Route 355 North

Make a left onto E. Middle Lane. Make another Left onto Maryland Avenue. Make a Right onto Court House Square. Parking lot is on the Right after M & T Bank.

From Route 355 South

Cross over Shady Grove Road, Gude Drive and follow Route 355 towards downtown Rockville. Get in your right-hand lane once you pass Montgomery College and the intersection where the road splits to the right (Washington Street, post office, gas station). Go right on N. Washington Street by the post office. Continue Straight until E. Middle Lane. Make a left on East Middle Lane. Then Make a Right on Maryland Ave. Make another Right onto Court House Square. Parking lot is Next to the M & T Bank on your right.

C. Kitchen Privileges

There are two kitchens on the 3rd floor one on the 4th floor and 4 on the 5th Floor. The kitchens are fully equipped with microwave ovens, coffee machines, etc. All employees are responsible for cleaning their own dishes and silverware.

D. Recycling

CPI recycles paper. There are marked boxes for paper throughout the office. If you are unsure whether a type of paper can be recycled, please refer to the listing of acceptable papers on the side of each recycling box.

E. Supplies

Orders for office supplies should be placed through the Office Administrator. Orders other than office supplies must be approved by a supervisor.

F. Telephones

Most of our client contact is through the telephones. It is extremely important that everyone keep this in mind at all times. Personal phone calls should be kept to an absolute minimum. While we realize that personal calls may be unavoidable, they should be handled as quickly as possible since our lines need to be kept free for business.

G. Messages

Upon returning to your office, check to see if your MSG light is lit. This indicates that you have messages in your voice mailbox. Please check your voice mail often and return client calls promptly.

H. Direct Dial (DID) Numbers and Voice Mail

Each person in the office will be assigned a DID number. Employees are urged to give this number out as often as possible as it leaves the main lines available for other incoming and outgoing calls.

If you have questions regarding the phones, please see Dawn Wowkanyn.

I. In-House Celebrations/Rockville

Each department will be responsible for planning luncheon/showers for 1st babies and for weddings. CPI will continue to give a gift to the employee and will cover the cost of the luncheon. The department will be responsible for any additional gifts. It is the option of each department whether or not to have the shower just for the team involved or the whole department. These celebrations should be done on a quarterly basis. These are the departments that should include all employees.

Annuity Service
External Programmers/Trainers
Internal Programmers
CPISI

Marketing
Support Team
Accounting
System's Team

J. Postage Machine

The postage machine (located in the mail room) is available for outgoing mail via the U.S. Postal Service. For personal mail, please contact Dawn O’Leary or Juan Mendez.. A domestic letter costs \$.49 and a postcard costs \$.33 to mail. For all other weights and countries, use the scale provided.

K. FedEx

Make sure to include a telephone number on all FedEx packages to avoid delays and extra charges. Please try to give the administrative assistants any correspondence to be sent via FedEx by 4:00pm each day. They close the FedEx database at 4:45 each day in order to allow time to printout and sort the reports. If your correspondence will not be finished by 4:00pm, please tell the administrative assistant in advance so they can prepare the package.

Employees are welcome to take advantage of FedEx for personal reasons. If you choose to send a package for personal reasons, ask the Administrative Assistant how much the package costs and either give the money directly to the Accounting Director or put it in the postage can.

L. Email

Internet e-mail is available to all employees. Employees are cautioned to exercise reasonable, ethical and business judgment in e-mail connections. Nothing should be changed in your e-mail settings unless the systems team is involved. Do not reset your “check every minute” parameter as that causes a huge amount of traffic on the network. Although you are not totally responsible for others sending you attachments, you should not send them around the office unless necessary for business. They should not be opened at all unless you have verified with the sender that it is valid. Most attachments are large programs which slow down our network while being sent and more importantly, they are a prime carrier of viruses. If you belong to non-work related news groups, organizations, etc. that send you e-mail, please have these sent to your personal Internet account rather than your CPI account. Some of these groups generate huge amounts of email that bog down our server and network. Please remember that e-mail is a professional business tool.

M. Internet

You should only be using the Internet for work-related projects and research during normal working hours. If you need to use the Internet for personal reasons, this should be done either before or after work hours. In light of recent viruses, employees are advised to use caution on Internet browsing for non-work related purposes. CPI will ban certain web sites via the firewall if we see this is being abused.

N. Hardware/Software

Please know that all computer equipment at CPI is the property of CPI and not the individual using it. This means that CPI is responsible and liable for all hardware and software loaded on your computer. It is not acceptable for anyone to install hardware or software not purchased by CPI. If you have a need for hardware/software upgrade please use the Trouble Ticket to make the request. There are no exceptions to this rule and it includes screen savers, sound cards, speakers, memory, etc. It is a communication tool and should not be abused. Do not modify any setting or configurations on your PC.

Company Desktop/Laptop Security

Policy Purpose

This policy addresses the actions that must be taken by all CPI personnel who have a company-issued desktop/laptop, or who are temporarily using a 'shared' company laptop, or the laptop of another employee.

Requirements

- a) All laptops acquired for or on behalf of the company shall be deemed company property. Each CPI employee issued with a laptop is responsible for the security of that laptop, regardless of whether the laptop is used in the office, at the employee's place of residence, or in any other location such as a hotel, conference room, car or airport. CPI personnel are responsible for the physical security of laptops assigned to them.
- b) Where possible, employees must avoid leaving their laptop unattended in an automobile. If they must do so temporarily, the laptop must be placed in the trunk. Laptops that will not be used for several days or longer must be locked out of sight in a secure cabinet or safe.
- c) Do NOT loan out your laptop to someone else. Loaning it out is a good way to lose it or get it back with a virus on it. Files could also be copied and passwords to e-mail and other accounts could be accessed without your knowledge.
- d) Where possible, employees should use a screen saver with an alphanumeric password when leaving their laptop on and unattended at any location.

- e) When traveling through airports, bus terminals, etc. laptop users should be trained to keep portables in their possession at all times. If possible, the carrying case should be inconspicuous in its design.
- f) Never check laptop computers into a baggage claim. Luggage theft is a problem at many airlines and airports, and valuable electronic equipment is a high target item.
- g) CPI laptop users are encouraged to backup their files frequently.
- h) CPI personnel should NOT download or install 3rd party non-CPI business related software, including on the user's own home network. If you connect to your home network you must use the installed firewall software or deploy another firewall provided by your ISP. Any non-CPI network remote connection can expose CPI business and personal data to key-loggers, viruses, spyware, hackers and phishing attacks.
- i) CPI is NOT responsible for any personal data/software installed on laptops.
- j) ALL home laptop/desktop users personnel should connect to the CPI via Citrix or VPN. All computers (desktop or laptop), whether owned by CPI or not, connected to the CPI network via VPN **MUST**
 - ☐ Use updated anti-virus software
 - ☐ Use updated personal firewall software
 - ☐ Have the latest security-related Windows or other software vendor patches/fixes installed

Only VPN clients approved by the CPI systems team may be used. By using VPN technology with equipment not CPI-owned, users must understand that their machines are an extension of the CPI network, and as such are subject to the same rules and regulations that apply to CPI owned equipment to protect the integrity of CPI network data. All VPN connected PC's to the CPI network must be configured to comply with all CPI computer related policies.

- k) CPI personnel must use and maintain all security software programs (anti-virus, firewall and spyware remover programs) installed on laptops to help protect and secure proprietary information and preserve data.
- l) A CPI systems team member should be made aware of ANY software/hardware that requires updates or configuration. ALL laptops should be made available to systems team members for service and software updates as needed.

Violations and Penalties

Violation of this policy may be grounds for disciplinary action. If an employee's laptop is lost or damaged, the employee will be responsible for the cost of replacing the laptop.

O. Hardware/Software Requests

If you have any requests for hardware or software, please go through your supervisor and then they will pass on the requests to the systems team. Please do not go to the systems team directly with software or hardware requests. If your supervisor is not available, you can talk to Managing Director. Supervisors should clear all hardware/software purchases through Managing Director.

P. American Express Cards

If an employee has been issued an American Express card it should be used for any business materials and travel expenses. It should NOT be used for any personal expenses while traveling for CPI unless it is an emergency. Charging personal items on your corporate American Express card makes it difficult for the accounting department and complicates matters when we file taxes.

Q. Dress Code

CPI's dress code is casual but neat from Monday through Friday.
Shorts may be worn on Fridays if they are mid-thigh or longer (ex. bermuda shorts).
Not allowed any day: slippers, flip-flops, pajamas, ripped jeans, clothing with political or offensive graphics
Business attire is required when visiting clients.

IV. HIRING, DISCIPLINE AND TERMINATION POLICIES

A. At-Will Employment:

Your employment at CPI is 'at will,' meaning that you or CPI may terminate your employment at any time for any reason.

Employees who resign voluntarily by providing at least two weeks' written notice of resignation will receive unused, accrued vacation.

Employees who are involuntarily terminated will be paid for unused, accrued vacation. At CPI's discretion, a severance may be paid in addition to accrued, unused vacation leave.

Onboarding Process:

- ☐ New employees must sign CPI's Restrictive Covenant which includes a non-compete statement as well as basic expectations required for continued employment.
- ☐ Form I-9 completed with copies of two forms of ID
- ☐ New employee will be checked through the Federal E-Verify system which compares information entered by an employer from an employee's Form I-9, Employment Eligibility Verification, to records available to the U.S. Department of Homeland Security and the Social Security Administration to confirm employment eligibility.
- ☐ Criminal background check is run via SentryLink online system

B. Discipline and Termination Procedures

The following offenses will result in disciplinary action, and possible termination:

- ☐ Excessive absenteeism.
- ☐ Excessive tardiness.
- ☐ Inattentiveness to work, including but not limited to, failure to start work at the designated time, quitting work before proper time, or leaving assigned work area, building, or project during working hours without authorization from appropriate supervisor.
- ☐ Posting unauthorized materials on walls or bulletin boards; defacing or removing authorized material from bulletin boards.
- ☐ Violation of a safety rule or safety practice.
- ☐ Willful violation of CPI security policies
- ☐ Smoking in prohibited areas.
- ☐ Failure to report for work without giving the supervisor or department head notice of absence within two hours after the beginning of the scheduled workday.
- ☐ Violation of CPI's Restrictive Covenant
- ☐ Performing work for another employer other than CPI during working hours.
- ☐ Theft of CPI property
- ☐ Engaging in harassing conduct
- ☐ Any other offense of equal magnitude to the above.

Disciplinary action for the same or different offenses may progress in the following manner, except in cases where a major offense such as theft or intentional security breach has occurred which will be grounds for immediate termination of employment:

1. Verbal warning. Verbal statement to employee by supervisor, department head, office manager or other CPI executive that he/she has violated a rule and/or regulation and that such violation may not continue.
2. Written reprimand. Formal notification in writing to employee that he/she has violated a rule and/or regulation. This may include a specific trial period for employee to demonstrate improvement.
3. Termination. The employer/employee relationship is severed.

Termination Procedure:

Voluntary - The company recognizes that personal situations may arise which require a voluntary termination of employment. Should this occur, the company requests that the employee provide two weeks advance notice in writing. This request does not alter an employee's at-will relationship with the company. All rights and privileges of employment with the company terminate upon the date of separation. Terminating employees are required to return all company property assigned to them. Failure to do so may result in the withholding of their final paycheck.

Involuntary – The terminating employee will meet with Office Administrator and supervisor or other manager, to discuss reason(s) for termination. Employee will be given a written agreement with reasoning why they have been terminated and explaining accrued vacation, final payroll details and details about severance, if any is being offered. The agreement states employee agrees not to bring legal action against CPI. Employee is given required timeframe to decide whether to sign the agreement. The Employee will then be escorted from premises. Employee will return all keys, company credit cards, or other company owned items to CPI. Employee's personal property from the office will be packed and sent via mail or courier.

All CPI system accounts previously accessed by terminating employee will be disabled. Key personnel such as Payroll Admin. and Office Admin. will be informed. Terminated employee's email and voice mail auto-replies will be updated and/or rerouted to a CPI employee to ensure urgent messages are handled.

V. **CPI JOB DESCRIPTIONS**

(rev. 10/2021) (rev. 11/2021) (rev. 05/2022)(07/2022)

Patent Annuity Service Representative

Responsibilities:

- Support a group of CPI annuity clients within a designated region
- Input and update annuity data on CPI's system based on client instructions and reports received

- Train new clients on annuity procedures, reports, etc. Assist with the startup process.
- Verify data entry of other annuity reps.
- Analyze discrepancy reports and communicate with clients to clarify payment issues
- Review and analyze daily reports
- Affect patent annuity payments of clients' behalf
- Work with accounting dept. regarding monthly and quarterly client invoicing of annuity payments
- Run reports for clients as requested
- Track country laws and update CPI data accordingly
- Track & verify annuity payment receipts
- Work with CPI programmers regarding docketed system updates
- Communicate with and send instructions to country patent agents

Job Requirements: Bachelor's degree or at least 3 years work experience working with customers and/or computer systems.

On the job training at CPI: Yes

Application Developer, External

Responsibilities:

- Develop and build proprietary digital solutions and applications for our law firm and corporate clients.
- Perform work on complex web back-end web application development projects requiring expertise with programming languages such as Asp.net, C#, Visual Basic, SQL Server, HTML, CSS, JavaScript, JQuery and API's;
- Design, code, modify, and update client-server web-based applications using information architecture and web-design foundational principles requiring a strong understanding of Web User Interface Design, cross-browser compatibility, general web functions and standards;
- Convert application systems with different data sources into CPI databases while contemporaneously performing data analysis, data mapping, conversion testing, and data comparisons for clients;
- Apply knowledge of multiple web technologies to provide top level service support for clients and issues that arises.
- Utilize knowledge of IT security principles and the utilization of intellectual property laws to apply specially tailored programming for Patent and Trademark Intellectual Property Management Systems and Patent Annuity Payment Services
- Employ knowledge of patent and trademark processing procedures to respond to client business system requirements.

Job Requirements: Bachelor's degree with technical major or at least 5 years work experience with system development using JavaScript, ASP.NET, C#, CSS, HTML, TSQL, and/or scripting in MS SQL

On the job training at CPI: Yes

Application Developer, Internal

Responsibilities:

- ☐ Analyze, design, code, test, and maintain applications for the Patent Annuity System on the IBM AS/400 iSeries platform. This includes programming for data entry, update/file maintenance, reports generations, and auto-generations of emails for clients, agents, and patent office using COBOL, Control Language, and RPG.
- ☐ Meet with Patent Analysts to discuss program designs to automate processes and problem resolution to enhance productivity of existing computer application systems.
- ☐ Evaluate codes for efficiency, debugging and quality assurance by reviewing programs on a frequent basis and making adjustment when they are necessary to ensure that the system is working properly.
- ☐ Develop and maintain technical documentation, guidelines, and procedures.
- ☐ Create job schedulers on the AS/400 system that will automatically execute batch application programs hourly, daily, weekly, or monthly as needed.
- ☐ Generate ad-hoc or query reports using SQL.
- ☐ Learn new technical concepts and programming languages as needed.
- ☐ Provide technical support to end-users on a 24-hour basis by participating on the Programmer On-Duty rotation.

Job Requirements: Bachelor's degree with technical major or at least 5 years work experience with system development using JavaScript, COBOL, RPG, MS ACCESS, C# or scripting in MS SQL

On the job training at CPI: Yes

Software Trainer

Responsibilities:

- Train new client users on CPI systems – either onsite or via Internet
- Train existing clients on an ongoing basis on systems, new features and modules
- Develop documentation for all CPI client systems, modules, procedures.

- Provide ongoing support to clients to answer questions, provide documentation and assist them to create reports via queries.
- Assist training new CPI employees on CPI systems
- Demonstrate CPI products at User Group Meetings, IP Conferences and New Product Demonstrations

Job Requirements: Bachelor's degree with technical or education major or at least 3 years work experience with user training, client service, or technical field.

On the job training at CPI: Yes

Accounting Representative

Responsibilities:

- Analyze financial information
- Prepares financial reports to determine or maintain record of assets, liabilities, profit and loss, tax liability, and other financial activities.
- Is responsible for a variety of accounting processes including financial analysis, collections and payments, managing retirement accounts, payroll.
- Compiling/reporting quarterly/ end-of-year reconciliations and financial reports.
- Assist in affecting our more than 800,000 patent annuity payments on behalf of our clients across the globe.
- Handle Client invoicing
- Work to clients to integrate our systems and processes with their accounting software

Job Requirements: Bachelor's degree in Accounting, Finance or similar or at least 3 years work experience in the accounting

field. On the job training at CPI: Yes

Cloud Architect

Responsibilities:

- Design the best cloud solution for the company's products
- Work with the cyber security specialist to maintain security of the cloud environment
- Keep track of assets/resources in the cloud environment
- Work with web and database administrators in implementing and deploying the company's software products to the cloud environment
- Work with application developer on finding the best solution for the application and the cloud environment needed
- Trouble-shoot issues related to the cloud environment.
- Provision resources.
- Technical documentation

Job Requirements: BS degree in Computer Science, Information Systems, Engineering or similar or at least 5 years work experience in related field

On the job training at CPI: Yes

Web Administrator

Responsibilities:

- Keeps track of certificates and encryption keys used in the web servers
- Monitor web server and application performance
- Configure/maintain/update/upgrade the web application and servers
- Maintain/manage web servers' high availability
- Work with cyber security specialist to implement and harden server security
- Work with database administrator in the deployment of the company's software products
- Trouble-shoot and resolve web system related issues
- Support application developers with web server related issues
- Work with the cyber security specialist and database administrator on periodic vulnerability tests.
- Work with network engineer on connectivity demand and issues
- Perform capacity planning
- Work with infrastructure to ensure that needed system resources are allocated
- Maintain proper backups of web files
- Apply windows updates
- Apply web files updates per programmers' specs.
- Technical documentation

Job Requirements: BS degree in Computer Science, Information Systems, Engineering or similar or at least 5 years work experience as Web Admin or related field

On the job training at CPI: Yes

Database Administrator

Responsibilities:

- Keeps track of the company's internal and client system databases
- Monitor databases and their servers' performance
- Maintain proper backups of databases and maintain server availability
- Trouble-shoot and resolve internal and client database related issues
- Support programmers with database related issues
- Perform scheduled review of databases and user access to them
- Work with the cyber security specialist and web administrator on periodic vulnerability tests.
- Perform capacity planning

- Work with infrastructure to ensure that needed system resources are allocated to databases
- Randomly test backups to ensure that the information stored on them is still recoverable.
- Monitor jobs execution history.
- Apply SQL Server service pack, cumulative updates, windows update without downtime.
- Apply database updates per programmers' specs.

Job Requirements: BS degree in Computer Science, Information Systems, Engineering or similar or at least 5 years work experience as Database Admin or related field

On the job training at CPI: Yes

Cyber Security Specialist

Responsibilities:

- Identify potential network, domain (PCs and servers) and database threats and find ways to mitigate them
- Keep the company security policy up-to-date
- Perform scheduled audits on users' access list
- Perform scheduled review on users' roles to be in line with the security policy.
- Work with other IT staff to harden IT infrastructure (hardware, network, PCs, servers, databases)
- Work with the web and database administrators on periodic vulnerability tests.
- Support employees with Cyber Security issues, including malware, phishing and other forms of virtual attacks to the system
- Manages SOC2 auditing efforts and compliance
- Technical documentation

Job Requirements: BS degree in Computer Science, Cyber-Security, Engineering or similar or at least 5 years work experience in Cyber Security or related field

On the job training at CPI: Yes

Network Engineer

Responsibilities:

- Provide network communication support to the company and its employees
- Maintain efficiency and efficacy of the network structure of the company
- Monitor the company's network connectivity and demand.

- Keep track of network assets and support contacts.
- Keep network software and equipment up-to-date
- Work with Cyber Security Specialist to maintain the firewall and secure the network
- Work with other IT staff in providing consistent working network infrastructure
- Work with vendors and manufacturers in procuring/upgrading/support of network equipment
- Technical documentation

Job Requirements: BS degree in Computer Science, Cyber-Security, Engineering or similar or at least 5 years work experience as a Network Engineer or related position

On the job training at CPI: Yes

Windows Systems and AD Administrator

Responsibilities:

- -Manage the company's computer domains
- -Maintain and audit user roles and permissions
- -Works with cyber security specialists in securing the Windows workstations and servers.
- -Works with network engineers in securing good network communication
- -Maintain inventory of assets that are part of the domain
- -Installs/upgrades/configures/updates Windows workstations and servers
- -Provide technical support to company users
- -Work with vendors and manufacturers in procuring/upgrading/support of workstations and servers
- Technical documentation

Job Requirements: BS degree in Computer Science, Cyber-Security, Engineering or similar or at least 5 years work experience as a Network/System Admin or related position

On the job training at CPI: Yes

Client Account Representative

Responsibilities:

- Reach out to client prospects via phone, email or mailings to describe CPI products, emphasize how products will meet prospect requirements, and schedule product demonstrations
- Follow up with prospects after meetings and provide documentation, costs quotes or agreements as needed etc.

- Stay abreast of new products and features
- Keep in close contact with current clients to ensure satisfaction with CPI products and inform them of latest features, and releases.
- Attend User Group meetings
- Negotiate client agreements

Job Requirements: Bachelor's degree or at least 3 years work experience with customer service, support or sales

On the job training at CPI: Yes

Marketing Representative

Responsibilities:

- Meet with CPI clients to demonstrate new releases and products
- Meet with client prospects to demo systems and discuss products
- Assist with marketing campaigns and advertising
- Update client information database
- Monitor industry trends
- Develop leads
- Lead product demonstrations and discussions at User meetings and hotel demonstrations

Job Requirements: Bachelor's degree or at least 3 years work experience in the marketing field

On the job training at CPI: Yes

Administrative Assistant

Responsibilities:

- Report to management for administrative support with a variety of tasks to ensure efficient operation of the office.
- Answer incoming calls and direct accordingly
- Schedule and plan company events
- Assist with health benefits issues
- Assist staff with reports, letters and mailings as needed
- Communicate with building manager regarding office issues
- Order and maintain office supplies

Job Requirements: Bachelor's degree or at least 3 years work experience in Administration

On the job training at CPI: Yes

Administrative Support Clerk

Responsibilities:

- Sort and distribute incoming mail
- Pack and process outgoing mail, packages, etc.
- Distribute internal reports
- Assist marketing department with marketing mailings
- File invoices, client documents and other office documents.
- Retrieve and deliver documents as requested

Job Requirements: Associates Degree or at least 1 year work experience

On the job training at CPI: Yes

Executive Job Descriptions

CEO: Oversees and makes major corporate decisions regarding all aspects of the company's business including operations and resources.

Director of Accounting and Finance: Oversees and manages the general accounting functions, including, but not limited to: accounts payable, accounts receivable, general ledger, payroll and taxes. Works with external auditors to ensure correct and timely closing and reporting at year-end. Reports to CEO.

Director of Sales and Marketing: Manages Client Account Reps for all territories, Phone marketing reps and marketing administration. Oversees client contract negotiations, ongoing client relations, marketing of products, develop marketing strategies and business leads. Reports to CEO

Information Services Director: Manages company's internal and external system development departments and client software training. Reports to CEO.

Director of Administration and Human Resources: Manages administration of CPI offices, human resources including personnel hiring and termination, administering company benefits and leave, and enforcing company policies and practices. Functions as Executive Sponsor for compliance and SOC2 auditing. Reports to CEO.

Director of IT: Oversees the technical infrastructure within an organization, leading a team of IT staff, determining business requirements for IT systems, managing the design and implementation of IT infrastructure, and eliminating security risks. Reports to CEO

Director of Patent Annuity Service: Oversees the operations of CPI's Patent Annuity Service including but not limited to; managing teams who handle client patent portfolios, affecting annuity payments on behalf of clients, processing instructions, verifying data, reconciling receipts. Reports to CEO