



# CORPORATE POLICIES

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Outlines key internal policies at SummitWorks Solutions to ensure consistent operations, compliance, and workplace safety.



# Introduction

SummitWorks Solutions maintains clear and comprehensive corporate policies to support a safe, productive, and compliant workplace. These policies apply to all employees, contractors, and interns, regardless of location, and are designed to uphold our core values of integrity, accountability, and service. Each policy is reviewed annually to reflect changes in regulations, industry standards, and company practices.





# 1. EXPENSE REIMBURSEMENT POLICY

## Overview:

Employees are reimbursed for reasonable and necessary expenses incurred during the course of conducting company business.

## Key Guidelines:

- *Submit expense reports within 14 days of the expense date.*
- *Include original, itemized receipts for all expenses over \$25.*
- *Use the company's preferred travel booking platform for airfare and hotels.*
- *Meals are reimbursable when traveling or attending approved client events, with a daily limit of \$75.*
- *Personal expenses, fines, and luxury upgrades are not eligible for reimbursement.*

## Approval Process:

- *Employee completes an expense report via the HR/Finance portal.*
- *Immediate supervisor reviews and approves or rejects the claim.*
- *Finance department processes approved claims within 10 business days.*



## 2. EQUIPMENT REQUEST POLICY

### Overview:

Employees may request equipment necessary to perform their job duties effectively.

### Key Guidelines:

- *Requests must be submitted through the IT Service Portal.*
- *Department head approval is required prior to purchase.*
- *Standard equipment includes laptops, monitors, keyboards, and headsets; specialized tools may require additional approval.*
- *Employees are responsible for proper care and return of company-issued equipment upon termination or role change.*

### Replacement & Maintenance:

- *Damaged or malfunctioning equipment should be reported immediately.*
- *IT will assess whether repair or replacement is the best course of action.*



## 3. SECURITY POLICY

### Overview:

Protecting company data, client information, and intellectual property is a top priority.

### Key Guidelines:

- *All employees must complete annual security awareness training.*
- *Multi-factor authentication is required for all company accounts.*
- *Company-issued devices must have up-to-date antivirus and encryption software.*
- *Use only approved cloud storage and collaboration tools for work documents.*
- *Report phishing attempts, security breaches, or lost/stolen devices immediately to IT Security.*

### Access Control:

- *Access to systems and data is granted based on job role and is reviewed quarterly.*
- *Shared accounts are prohibited unless specifically authorized.*



## 4. DATA PROTECTION POLICY

### Overview:

SummitWorks complies with all applicable data privacy laws, including GDPR, HIPAA (for healthcare clients), and CCPA.

### Key Guidelines:

- *Collect only the minimum amount of personal data required for business operations.*
- *Store sensitive data securely, both in transit and at rest.*
- *Use anonymization or pseudonymization techniques where possible.*
- *Dispose of physical and digital records in accordance with retention schedules.*

### Employee Responsibilities:

- *Do not share client data with unauthorized parties.*
- *Follow incident response procedures if data is compromised.*
- *Maintain confidentiality agreements even after employment ends.*



## 5. REMOTE WORK POLICY

### Overview:

Ensures remote work arrangements are productive, secure, and sustainable.

### Key Guidelines:

- *Remote work requires prior manager approval.*
- *Employees must have a secure home network and dedicated workspace.*
- *Use of personal devices for work must be authorized and meet company security standards.*
- *Be available during core business hours unless alternative schedule*

### Collaboration Expectations:

- *Attend virtual meetings with cameras on unless excused.*
- *Use company-approved communication platforms for all work-related messaging.*



## 6. CODE OF CONDUCT POLICY

### Overview:

Provides a framework for professional behavior in the workplace and when representing the company externally.

### Key Guidelines:

- *Treat all colleagues, clients, and vendors with respect.*
- *Avoid conflicts of interest; disclose potential conflicts immediately.*
- *Follow all applicable laws and regulations.*
- *Uphold ethical standards in decision-making.*

### Enforcement:

- *Violations may result in disciplinary action, up to and including termination.*
- *Severe breaches (e.g., harassment, theft, fraud) are grounds for immediate dismissal.*





## Conclusion

These corporate policies form the foundation of our operations and reflect SummitWorks Solutions' commitment to professionalism, compliance, and security. By adhering to these guidelines, employees contribute to a workplace that is fair, safe, and aligned with our organizational values.





# Thank You

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