Trip Itinerary – Your Guide to SitusAMC Systems

Welcome to SitusAMC!

One of the keys to our success is hiring good employees. We have hired you because we believe you have the skills and the potential to help SitusAMC succeed. We expect employees to perform the tasks assigned to them to the best of their abilities. We believe that hard work and commitment will not only benefit SitusAMC but will help give all of our employees a sense of pride and accomplishment.

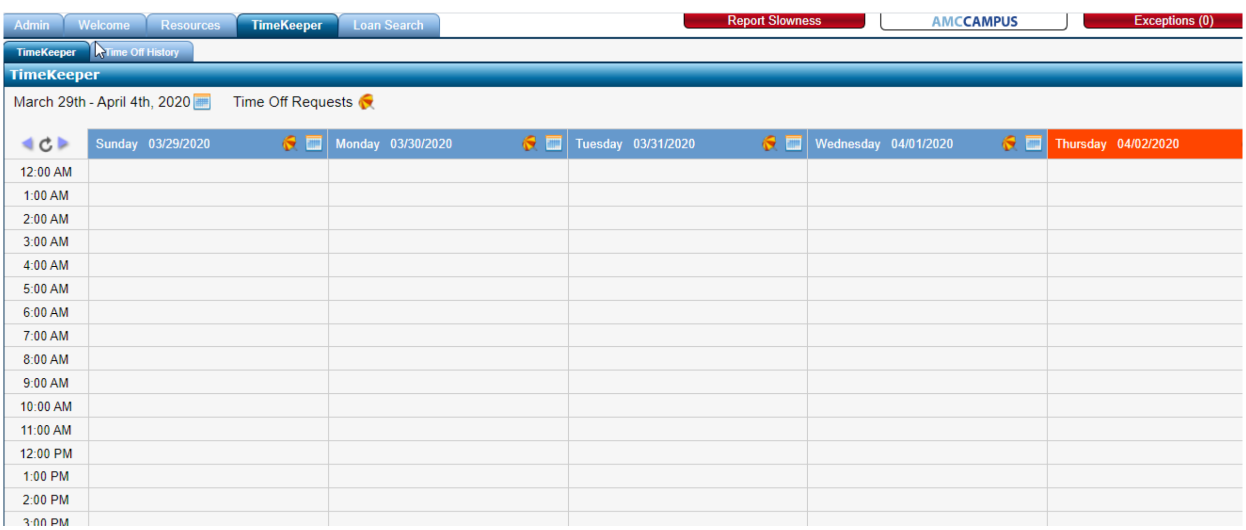
We are glad to have you.

Clarity Timekeeper Instructions

Table of Contents

What Is Timekeeper?

Timekeeper is an application we use to track time for payroll purposes.



Make sure to review, update, and save your Timekeeper entries daily.

How Do I Access Timekeeper?

Timekeeper is in Clarity and can be accessed two ways.

1. Timekeeper tab at the top of Clarity.

2. Timekeeper button within the Welcome tab.

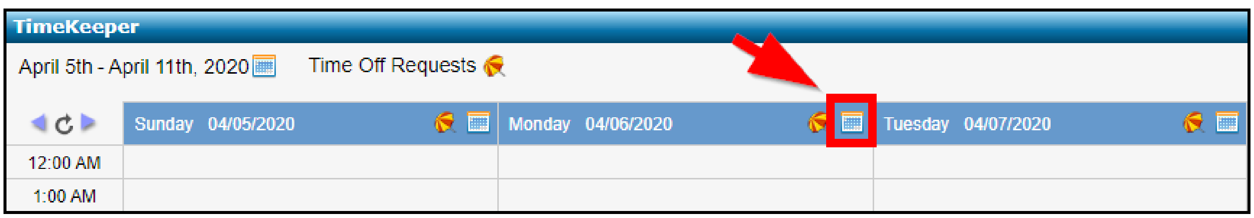
How Do I Enter My Time in Timekeeper?

Timekeeper automatically captures time spent working in a file.

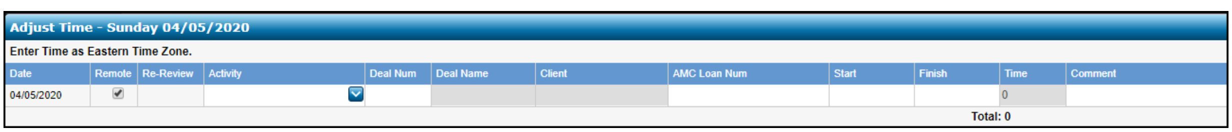
You are required to accept the automatic entry every time you complete a loan.

Timekeeper also automatically captures "General and Administrative" time in between files.

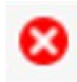
If you need to make manual adjustments to your time, click the calendar icon for the date you need to edit.



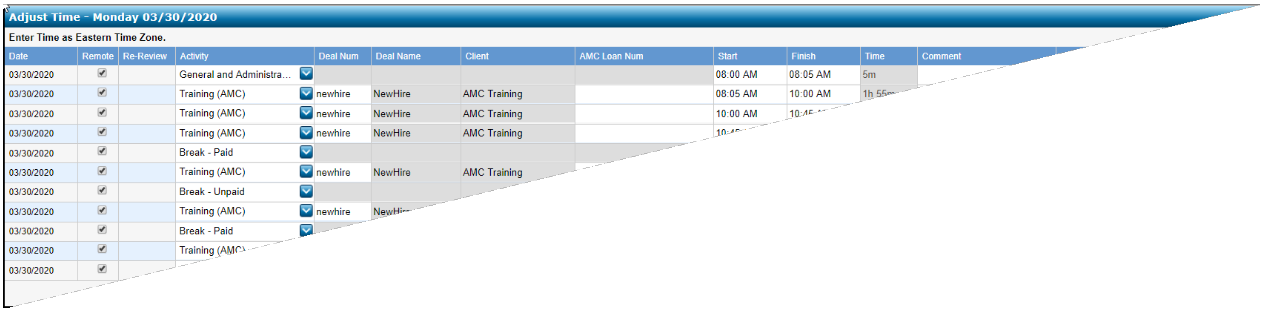
A separate window will open to make your adjustments.



- **Remote** indicator will automatically be checked if you are working remotely through VDI or VPN.
- **Activity** will automatically be selected for time spent in files and General and Administration time. You can also select from the list to input other time, such as Town Halls, Breaks, and PTO. For time spent in class, not working on a file, use **Activity: Training (AMC).**
- **Deal Number, Deal Name, Client,** and **Loan Number** will autofill for time spent working in your training files. For time spent in class, not working a file, use **Deal Num: NewHire** or **CrossTraining.** (No space between words).
- **Start and Finish Times** will autofill for certain activities, such as time spent in a file. Manual entries are required for certain activities, such as Training (AMC), Breaks, and Town Halls.
- **Time** for each activity entered will autofill based on the Start and Finish Times auto filled or entered.
- **Comments** should be added for all manual entries.

You can delete a row by clicking the red  found at the end of each row.

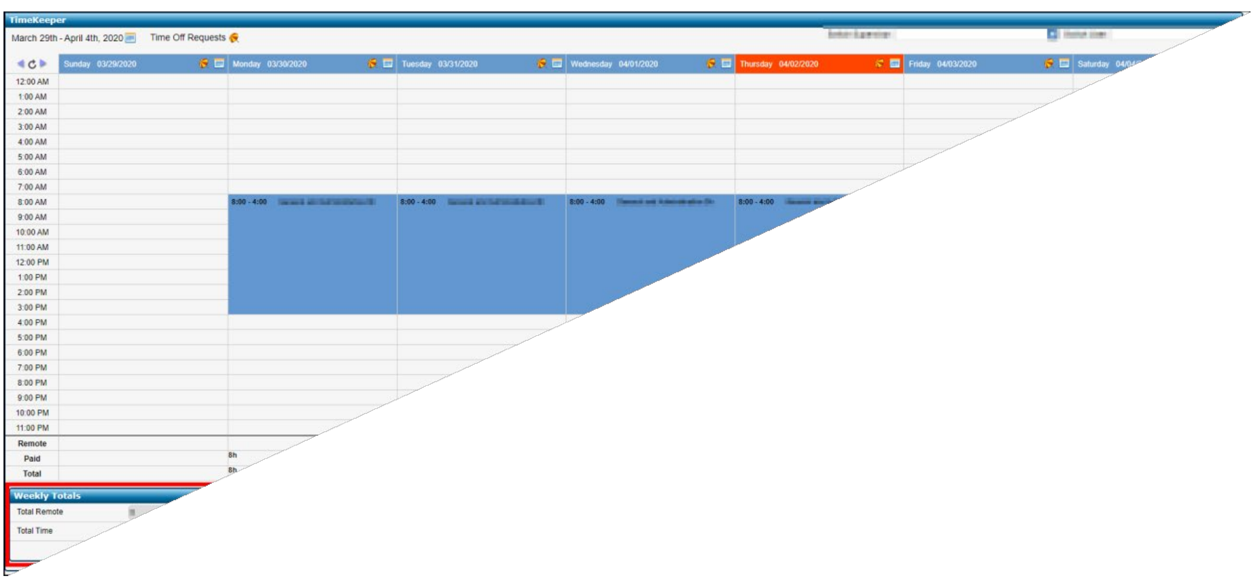
Typically, you should not delete automatic entries, but you may need to delete a row you manually entered.



If you believe that an entry is not accurate and should be modified in any way, please reach out to your leader with the details so they can give you proper direction on modifying time entries.

As you work through your week, **Weekly Totals** will be auto populated in Timekeeper for you in real-time.

These can be viewed in the lower, left-hand corner of the Timekeeper tab.



- **Total Remote Time** is the total number of hours worked remotely.
- **Total Time** is the total number of hours captured including unpaid breaks.
- **Total Paid Time** is the total number of hours captured that is classified as "paid" time. (Excludes unpaid breaks).
- **Unpaid Time** is the total hours captured that is classified as "unpaid" time.

Questions

If you have questions about Timekeeper, and you are a **Full Time Employee,** please email: fteproduction@situsamc.com.

If you have questions about Timekeeper, and you are a **Part Time Employee,** please email: pteproduction@situsamc.com.

How to Enter Your Time in Clarity – PLEASE CHECK WITH YOUR LEADER FIRST TO SEE WHAT SYSTEM YOU SHOULD USE FOR TIMEKEEPING

- Go to: https://systemx.amcfirst.com.
- Login to Clarity (same password as VPN).
- Click on **Timekeeper** from the top banner, this will take you to your timecard.
- Click on **calendar icon** to the right of the date on the calendar.
- Under **Activity,** click on dropdown and find appropriate Activity (Example: General and Administrative, ***consult with your Leader on the correct activity to use).***
- Enter start and finish time and click on **"Save."**
    - All time entries should have an **Activity** and a start and finish time.
    - Use timecard to record all time worked as well as breaks.
- The next working morning you will need to review and approve your timecard for prior day by clicking **"Approve."**
- ***Consult with your Leader on how to code your time specific to your department.***

How to Submit a PTO Request in Clarity – PLEASE CHECK WITH YOUR LEADER FIRST TO SEE WHAT SYSTEM YOU SHOULD USE FOR PTO REQUESTS

- Go to: https://systemx.amcfirst.com.
- Login to Clarity (same password as VPN).
- Click on **Timekeeper** from the top banner.
- Click on the **palm tree icon** next to date on the calendar.
- Under **Activity,** click on dropdown and find appropriate Time Off Type (Example: PTO).
- Click Save at the bottom of the page.
- Your time off request will automatically be sent to your leader for approval. Once approved your timecard will reflect this and you will receive a notification that your time off was approved.

Label in Clarity	**Definition**
Prior Year Carryover	PTO hours available from the prior year (Maximum 40 hours)
Available Balance	PTO hours available for use in real time. This balance will exclude future approval/pending time. (Maximum 40 hours)
Pending for Year	PTO hours pending approval from leader.
Earned YTD	PTO hours earned/accrued year to date.
Future Approved	PTO hours approved for future work dates.
Available for Year	PTO hours available for the year per employment status/accrual rate. This balance will exclude future approved/pending time.
Used	PTO hours used to date.
Projected Accrual	PTO hours projected to accrue for the remainder of the year.

PTO View in Clarity – PLEASE CHECK WITH YOUR LEADER FIRST TO SEE WHAT SYSTEM YOU SHOULD USE FOR PTO REQUESTS

Your PTO view is getting and update! Below you find the new view with an explanation of each field.

Prior Year Carryover	
Prior Year Carryover	21h 4m
Prior Year Carryover Used	21h 4m
Future Approved Carryover	0
Prior Year Carryover Balance	0

PTO Calendar Year	
PTO Max Accrual Hours	120h
YTD Accrued	60h 30m
Future Accrual	54h 54m
Used	10h 56m
Future Approved	16h
Balance	88h 28m

Prior Year Carryover	
Prior Year Carryover	21h 4
Prior Year Carryover Used	
Future Approved Carryover	
Prior Year C	

- **Prior Year Carryover:** This is the balance of hours that were unused from the previous year. The maximum hours you are allowed to Carryover are 40 hours (unless your state has a different policy).
- **Prior Year Carryover Used:** The amount of Carryover hours used this calendar year.
- **Future Approved Carryover:** Requested PTO hours that are for a future date.
- **Prior Year Carryover Balance:** Your Carryover Balance minus your used and future approved hours. ** Employees are permitted to carryover up to 40 hours of PTO the following calendar year, unless otherwise required by applicable law. PTO carryover must be taken by April 30th of the following year.

PTO Calendar Year	
PTO Max Accrual Hours	120h
YTD Accrued	60h 30m
Future Accrual	54h 54m
Used	10h 56m
Future Approved	16h
Balance	88h 28m

- **PTO Max Accrual Hours:** This is the maximum hours you are able to accrue this current calendar year.
- **YTD Accrued:** The amount of hours you have accrued as of the last pay period.
- **Future Accrual:** The amount of hours that you will accrue through the rest of the calendar year.
- **Used:** The amount of PTO hours you have already used as of the last pay period.
- **Future Approved:** Request PTO hours for a future date.

- **Balance:** Is your PTO Max Accrual minus your Used and Future Approved. Please note, this balance is not available for immediate use. **Your current available balance is YTD Accrued minus Used and Future Approved.**

*** Your PTO Max Accrual Rate will reflect your current PTO Tier Max Accrual ***
If during the current year you have experienced a change in PTO tiers, your YTD Accrued + Future Accrual will not equal your Max Accrual. It will reflect your previous tier accrual + new tier accrual.

All PTO Eligible Employees AVP & Below			
Years of Service	Max Annual Accrual Hours	Max Annual Accrual Days	Biweekly Accrual Hours
0 – 4 Years	120 Hours	15 Days	4.615385
5 – 9 Years	160 Hours	20 Days	6.153846
10+ Years	200 Hours	25 Days	7.692308
All PTO Eligible Employees VP & Above			
Years of Service	Max Annual Accrual Hours	Max Annual Accrual Days	Biweekly Accrual Hours
0 – 4 Years	160 Hours	20 Days	6.153846
5 – 9 Years	200 Hours	25 Days	7.692308
10+ Years	240 Hours	30 Days	9.230769

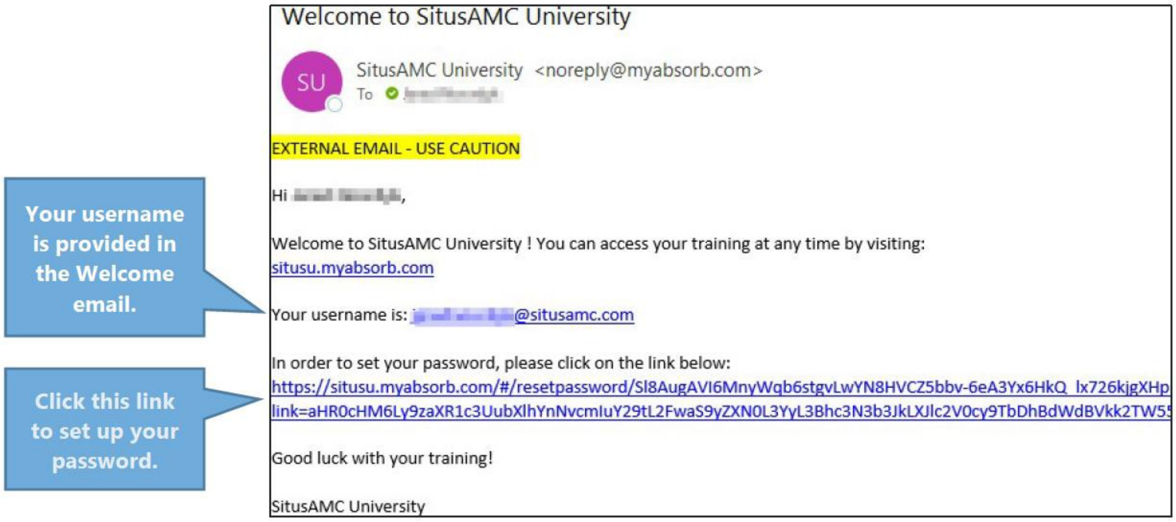
PTO is accrued on a biweekly basis (unless otherwise provided by applicable law) and is posted each payroll date on a pro-rate basis throughout the year (i.e., January 1st through December 31st), based on the following schedule. If an employee has a "grandfathered" accrual rate that is higher than listed below, those grandfathered rates will continue to be honored.

New Hire SitusAMC University Login and SMART Training Instructions

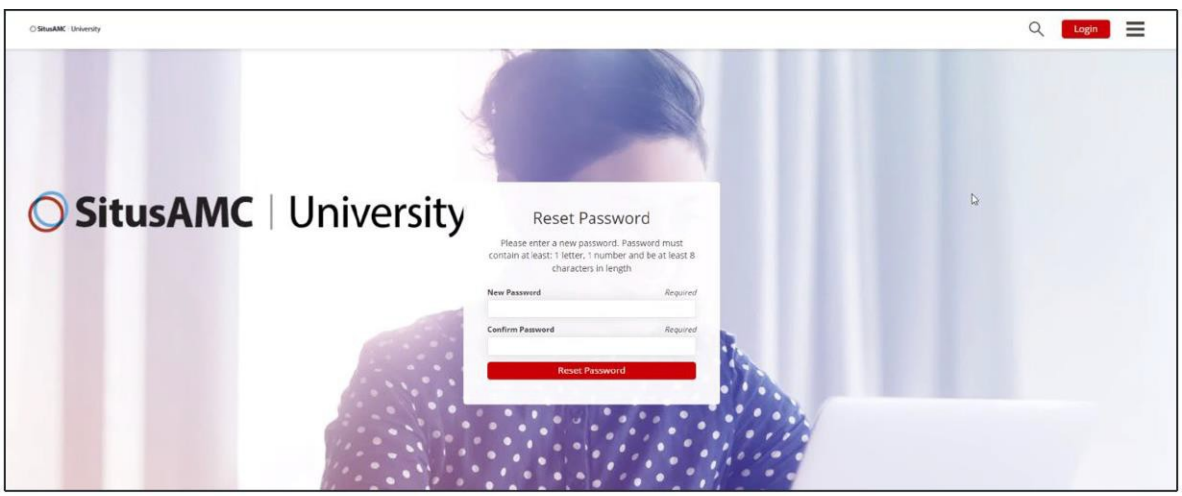
SitusAMC University is a web-based training program and Learning Management System (LMS).

You will receive a welcome email with your username and a link to the site. You can also access the site using this web address of direct link: https://situsu.myabsorb.com.

Welcome to SitusAMC University Email

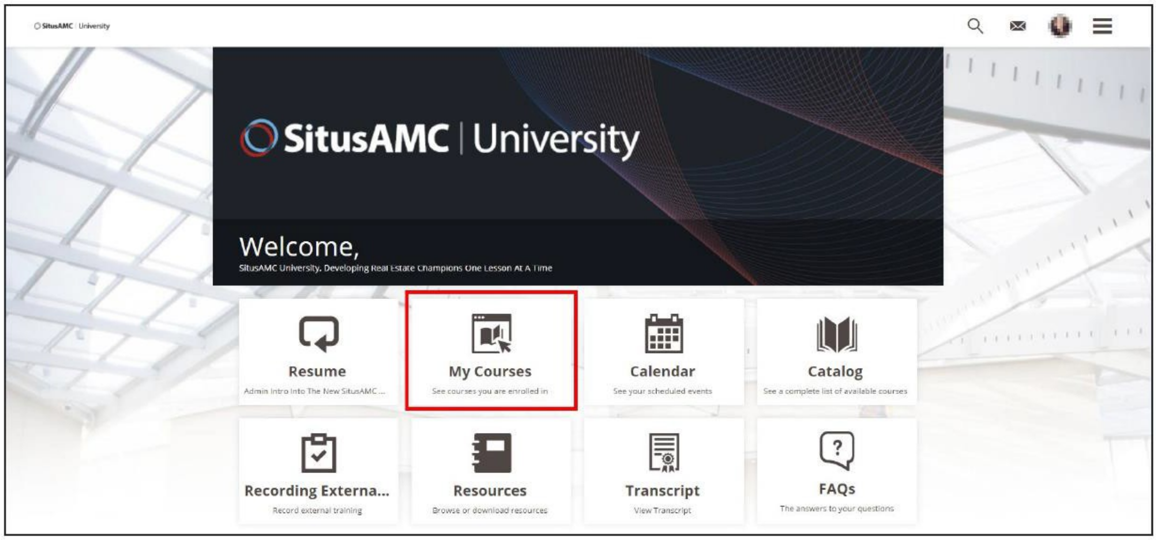


Click the Password Setup link in the email to set your password on your first login. You will be taken to the screen shown below. Enter your new password and click “Reset Password.”



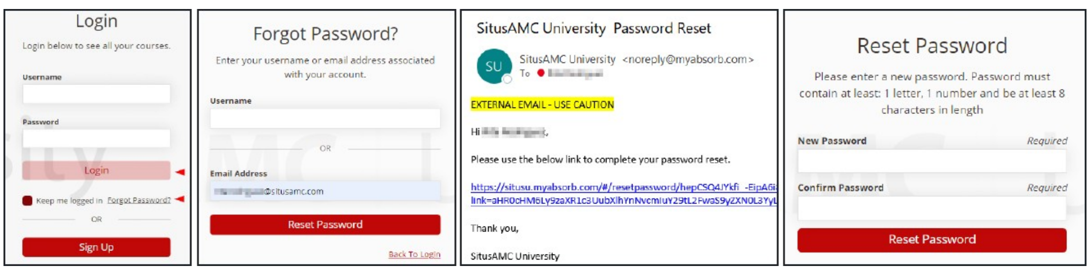
My Courses

After logging into SitusAMC University, you will see your learner dashboard. To access your assigned courses, click “My Courses.”



Forgot Password

If you are unable to login, try resetting your password using the "Forgot Password" link on the login page. Enter your SitusAMC email address to have a Password Reset link sent to you.



If you have requested a Password Reset link and have not received it within five minutes, please email traininghelpdesk@situsamc.com for further assistance.

SitusAMC Mandatory Annual Requisite Training (SMART)

SitusAMC is committed to ensuring the highest standards of integrity and conducting business in compliance with all applicable laws and regulations, in every jurisdiction in which we operate.

In accordance with this objective, SitusAMC requires all employees to complete key compliance training courses each year.

To access this training, navigate to "My Courses" after logging into SitusAMC University. Then find "2021 US – New Hire SitusAMC Mandatory Annual Requisite Training" and click Start.

SitusAMC University functions best in the Google Chrome internet browser.

If you have issues accessing the training after ensuring you are using the correct internet browser, please email the Training Helpdesk at traininghelpdesk@situsamc.com for assistance.

If you have any compliance questions after completing the training, please email compliancegov@situsamc.com.

Paylocity Log-In Instructions

To access Paylocity, you will use the same login information you created when you set up your address, direct deposit, taxes, and more in Paylocity before your first day with SitusAMC.

Website: https://login.paylocity.com/

Company Code: You will find this information in the email sent to your personal email address that contains Paylocity login information. You will need to know this company code is every time you login to Paylocity, so it might be a good idea to save this email or write the company code down and keep the information stored in a safe location only you can access.

Username: You can either create your own username, or you can use your employee ID. Your employee ID is in the email sent to your personal email address that contains Paylocity login information. If you choose to use your employee ID, it might be a good idea to save the email sent to your personal email address or write your employee ID down and keep the information stored in a safe location only you can access.

Password: Created by the user.

If you are having trouble accessing Paylocity or need a password reset, please sent a request to hrhelpdesk@situsamc.com and we will assist you.

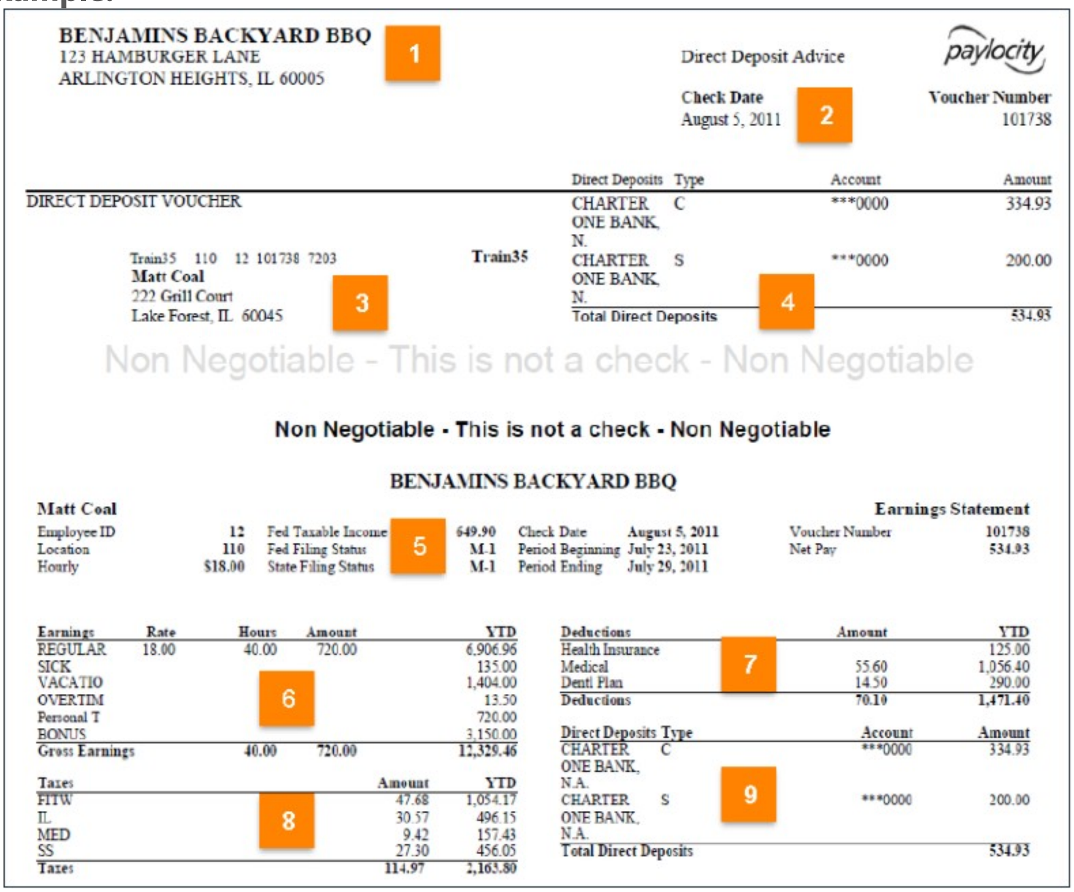
Resetting Paylocity Password

1. Navigate to the **Paylocity.com** login page.
2. Select **Forgot?** in the **Password** field.
3. Enter the Paylocity-assigned **Company ID.**
4. Enter the user's **Username.**
5. Enter the user's **Phone** or **Email** associated with the **Username** field.
6. Enable the **reCAPTCHA** checkbox indicating **I'm not a robot.**
7. Follow any human verification steps prompted by the **reCAPTCHA** box.
8. Select **Continue.** If the provided information matches the information on file and the account is not locked out, the system sends a One-Time, four-digit Passcode by email, text, or phone call.
9. Enter **One-Time Passcode.**
10. Select **Continue.**
11. Respond to the login challenge question with the appropriate response (if applicable).
12. Select **Continue.**
13. Enter the **New Password.**
    - Passwords are case-sensitive.
    - Passwords must be eight to 72 characters in length, must not be duplicates of any of the previous four passwords and must include two of the following three items:
        - One or more numbers.
        - One or more uppercase letters and one or more lowercase letters.
        - One or more non-alphanumeric characters.
14. Enter **Password** a second time to confirm.
15. Select **Finish.**

Paylocity Understand the Anatomy of a Paycheck

The numbers below each indicate one part of a paycheck followed by a corresponding explanation of each section. Checks may vary slightly from organization to organization. In order to maintain confidentiality, employees must contact their Company Administrator with questions as Paylocity in not authorized to speak directly with employees.

Example:


BENJAMINS BACKYARD BBQ 1
123 HAMBURGER LANE
ARLINGTON HEIGHTS, IL 60005

Direct Deposit Advice paylocity

Check Date August 5, 2011 2

Voucher Number 101738

DIRECT DEPOSIT VOUCHER

Train35 110 12 101738 7203 Train35
Matt Coal
222 Grill Court
Lake Forest, IL 60045 3

Direct Deposits	Type	Account	Amount
CHARTER ONE BANK, N.	C	***0000	334.93
CHARTER ONE BANK, N.	S	***0000	200.00
Total Direct Deposits 4			534.93

Non Negotiable - This is not a check - Non Negotiable

Non Negotiable - This is not a check - Non Negotiable

BENJAMINS BACKYARD BBQ

Matt Coal — Earnings Statement

Employee ID	12	Fed Taxable Income	649.90	Check Date	August 5, 2011	Voucher Number	101738
Location	110	Fed Filing Status	M-1	Period Beginning	July 23, 2011	Net Pay	534.93
Hourly	$18.00	State Filing Status	M-1	Period Ending	July 29, 2011		

5

Earnings	Rate	Hours	Amount	YTD
REGULAR	18.00	40.00	720.00	6,906.96
SICK				135.00
VACATIO				1,404.00
OVERTIM				13.50
Personal T				720.00
BONUS				3,150.00
Gross Earnings		40.00	720.00	12,329.46

6

Taxes	Amount	YTD
FITW	47.68	1,054.17
IL	30.57	496.15
MED	9.42	157.43
SS	27.30	456.05
Taxes	114.97	2,163.80

8

Deductions	Amount	YTD
Health Insurance		125.00
Medical	55.60	1,056.40
Dent Plan	14.50	290.00
Deductions	70.10	1,471.40

7

Direct Deposits	Type	Account	Amount
CHARTER ONE BANK, N.A.	C	***0000	334.93
CHARTER ONE BANK, N.A.	S	***0000	200.00
Total Direct Deposits			534.93

9

The following Paycheck Information is at the top of a paycheck:

1. **Employer Information:** Contains the Employer name and address information.
2. **Check Date:** The date the check can cash or when someone can expect direct deposit.
3. **Demographic Information:** Contains the Employee name and address information. The unique identifier above the employee's name consists of:
   - Company ID
   - Employee Cost Center Code
   - Employee ID
   - Check/Voucher Number
   - Paylocity Internal Control Identifier
4. **Net Pay:** Also known as take-home pay, income after necessary taxes and deductions have been withheld; may include direct deposit bank account information.

Additionally, the following Earning Statement Information will display:

5. **Allowances and Exemptions:** Personal exemptions reduce the employee's taxable income on

Form 1040. When entered into the payroll system, they reduce the same amount of wages from income tax withholding and approximate the employee's tax liability and the end of the year.

6. **Earnings:** Gross pay before taxes and deductions; contains hour, wage, and salary information for the current pay period.
7. **Deductions:** Amount that is or may subtract from an employee's paycheck; can be pre-tax or post-tax depending on the type of deduction. Also include voluntary and involuntary deductions (e.g., child support).
8. **Taxes:** Withholding amounts for each applicable tax authority. Federal Taxes paid to the IRS; FICA funds both Medicare and Social Security; state and local taxes paid to the city/state on address if applicable.
9. **Direct Deposit and Account Type:** Bank account information and amounts deposited, if applicable.

Current and historical check information is available any time by logging into Web Pay. Depending on company configuration, this information can be found in **HR & Payroll > Employees > Employee Payroll File > Pay > Current Check** or for Self Service Portal users, by selecting the most recent paychecks date link under the Compensation header.

Time Off	Available To Use	Plan Year Used
Paid Time	0.00	0.00
PTO	3.69	64.00

Benefits	Amount	YTD
401k Match	65.38	653.80

At the bottom of your paycheck as well, it shows your current PTO balance, plus your PTO balance Year-to-Date and the amount of money from your paycheck placed into your 401(K) account and how much is in your 401(K) account Year-to-Date as well.

Setting Up Your E-mail Signature in Outlook

SitusAMC E-mail Signature

Below is the e-mail signature that is to be used by all SitusAMC employees with SitusAMC email addresses. In addition to the core signature, we've created branded banners that help drive awareness of our brand. We've also developed specific HR banners for our HR professionals that link to the Careers Page and drive awareness of job opportunities. For those employees who are part of subsidiary brands (ComplianceEase, CJC Technologies, rSquared, Assimilate Solutions), please see instructions to set up your legacy email address – note: Employees with both a SitusAMC email and a legacy email should set up each address according to the instructions in this document.

Only approved banners are to be used and are included at the end of this document. You can request a new banner to be created by reaching out to andygarrett@situsamc.com.

Please follow the instructions below to set up your new email signature in Microsoft Outlook Desktop app. NOTE: If you are exclusively using web-based Outlook (Office 365), please see your new email signature and different set of instructions.

The email signature and the SitusAMC brand banner is shown below as an example:

Email Signature Setup Instructions

1. **Copy the SitusAMC e-mail signature below.**

Without NMLS#

NAME LASTNAME
Title Line 1

SitusAMC

T +1 000 000 000 | **M** +1 000 000 000
Street Address, Suite Number, City, State Zip
SitusAMC.com

This message is intended only for the person(s) to whom it is addressed and may contain confidential and/or proprietary material. If you are not the intended recipient, please do not read, copy, use or disclose this communication to others. If you received this message in error, please contact the sender immediately and delete any copies of the material from your system.

With NMLS#

NAME LASTNAME
Title Line 1
NMLS # 123456

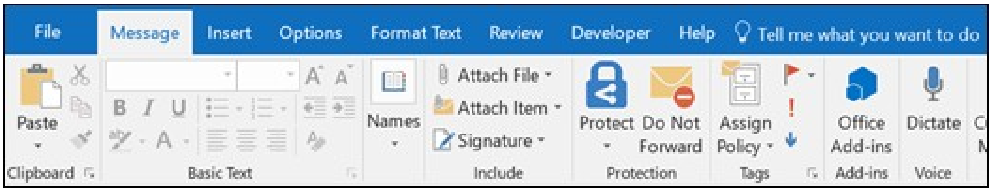
SitusAMC

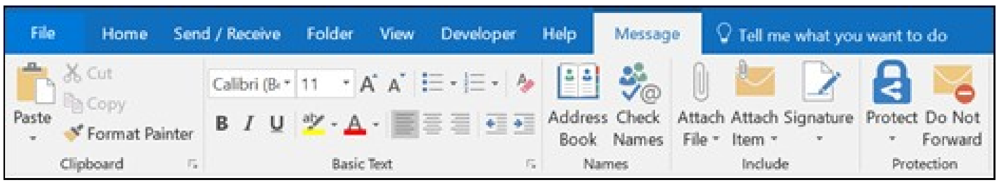
T +1 000 000 000 | **M** +1 000 000 000
Street Address, Suite Number, City, State Zip
SitusAMC.com

This message is intended only for the person(s) to whom it is addressed and may contain confidential and/or proprietary material. If you are not the intended recipient, please do not read, copy, use or disclose this communication to others. If you received this message in error, please contact the sender immediately and delete any copies of the material from your system.

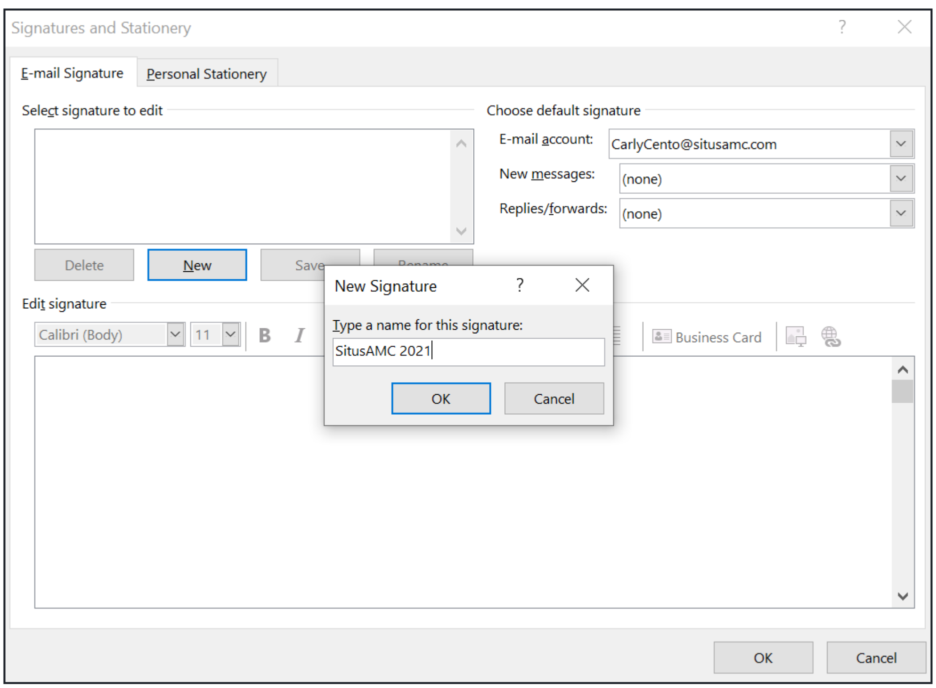
2. Open a new email message in Outlook.

3. On the **Message** menu, select **Signature > Signatures.** Depending on the size of your Outlook window and whether you are composing a new email message or a reply or forward, the **Message** menu and the **Signature** button might be in two different locations.

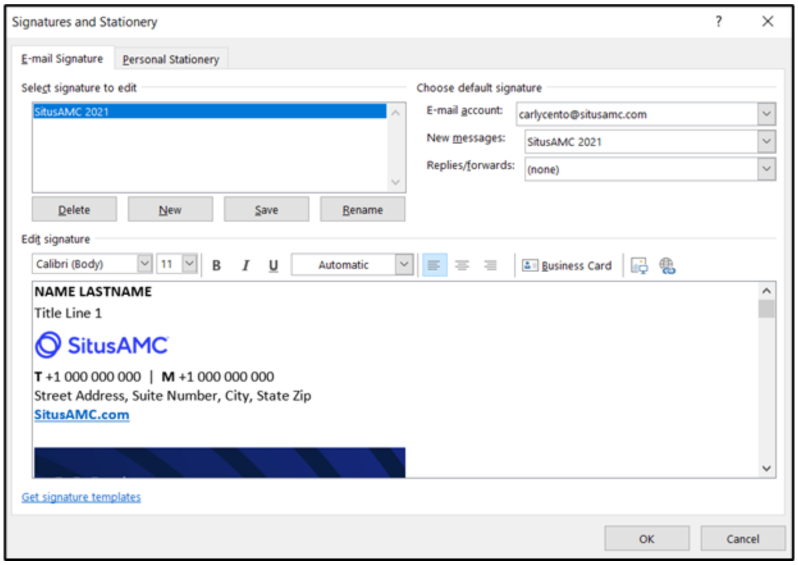




4. Under **Select signature to edit,** choose **New,** and in the **New Signature** dialog box, type a *name (i.e., SitusAMC 2021)* for the signature. Click OK.



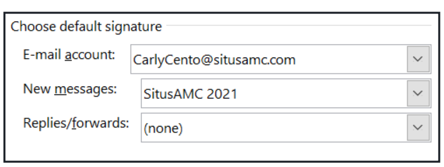
5. Under **Edit signature,** paste in the signature from the Word document.



6. Edit your **Name, Title, Phone Number(s),** and **Address.** If you do not want to include your mobile number, feel free to delete.

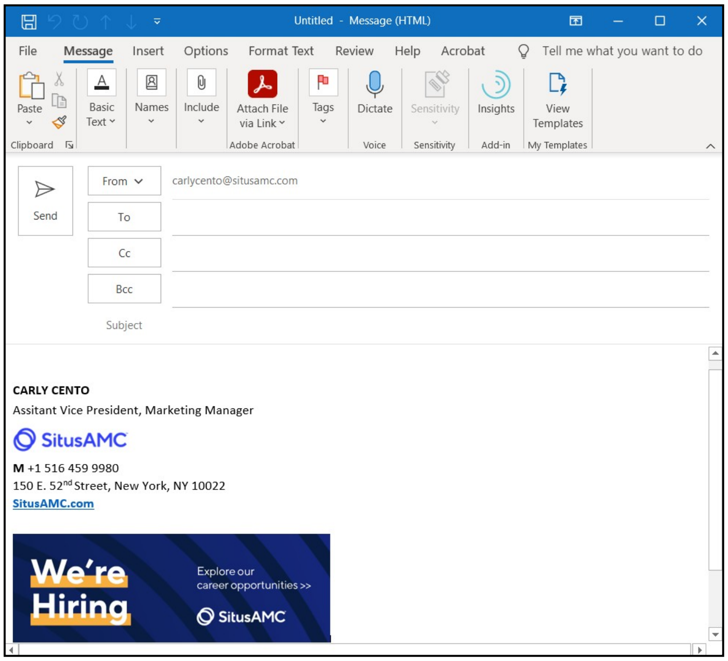
7. **If you would like, select a banner from the end of this section, copy it, and paste it between your email signature and the legal information.** Each banner is built to link out to a specific web address. Do not alter or delete the links tied to each banner. For employees of subsidiary brands (ComplianceEase, CJC Technologies, rSquared, Assimilate Solutions), please see instructions to set up your legacy email address signatures and banners.

8. Under **Choose default signature,** set your new email signature for **New messages.** You also have the option to set your new signature for all Replies/Forwards or leave as none.



IMPORTANT – If you choose to set the new signature for Replies/Forwards, make sure to highlight the text – name, title, phone and address – and change the color from "Automatic" to **black** by clicking the color box on the top row. This presents your signature from turning to blue when responding to emails.

9. Choose **OK** to save your new signature and return to your message. **Outlook does not add your new signature to the message you opened; you will have to close this message and open a new one to see the signature.** All future messages will have the signature added automatically.



If you have any questions on how to customize the e-signature or set it in Outlook, please reach out to the SitusAMC Service Desk at ServiceDesk@situsamc.com.

Approved E-mail Banners

BRAND BANNER (Links to SitusAMC.com/careers)

Subsidiary Brand E-mail Signatures

For those employees who are part of subsidiary brands (ComplianceEase, CJC Technologies, rSquared, Assimilate Solutions), please use the following signatures for your legacy email address. For those employees who also have a SitusAMC email address, follow the instructions at the start of this document to set up your SitusAMC address. As we finalize brand migration plans, we will communicate when to stop using legacy email and fully migrate to your SitusAMC email.

ComplianceEase

NAME LASTNAME
Title Line 1

T +1 000 000 000 | **M** +1 000 000 000
Street Address, Suite Number, City, State Zip
ComplianceEase.com

CJC Technologies

NAME LASTNAME
Title Line 1

T +1 000 000 000 | **M** +1 000 000 000
Street Address, Suite Number, City, State Zip
CJCweb.com

rSquared

NAME LASTNAME
Title Line 1

T +1 000 000 000 | **M** +1 000 000 000
Street Address, Suite Number, City, State Zip
rSquaredCRE.com

This message is intended only for the person(s) to whom it is addressed and may contain confidential and/or proprietary material. If you are not the intended recipient, please do not read, copy, use or disclose this communication to others. If you received this message in error, please contact the sender immediately and delete any copies of the material from your system.

Assimilate Solutions

NAME LASTNAME
Title Line 1

T +1 000 000 000 | **M** +1 000 000 000
Street Address, Suite Number, City, State Zip
AssimilateSolutions.com

This message is intended only for the person(s) to whom it is addressed and may contain confidential and/or proprietary material. If you are not the intended recipient, please do not read, copy, use or disclose this communication to others. If you received this message in error, please contact the sender immediately and delete any copies of the material from your system.

E-mail Signature and Set Up Instructions for Web-Based Outlook (Office 365)

1. **Copy the SitusAMC e-mail signature below:**

No NMLS ID#

NAME LASTNAME
Title Line 1

T +1 000 000 000 | **M** +1 000 000 000
Street Address, Suite Number, City, State Zip
SitusAMC.com

This message is intended only for the person(s) to whom it is addressed and may contain confidential and/or proprietary material. If you are not the intended recipient, please do not read, copy, use or disclose this communication to others. If you received this message in error, please contact the sender immediately and delete any copies of the material from your system.

With NMLS ID#

NAME LASTNAME
Title Line 1
NMLS # 123456

T +1 000 000 000 | **M** +1 000 000 000
Street Address, Suite Number, City, State Zip
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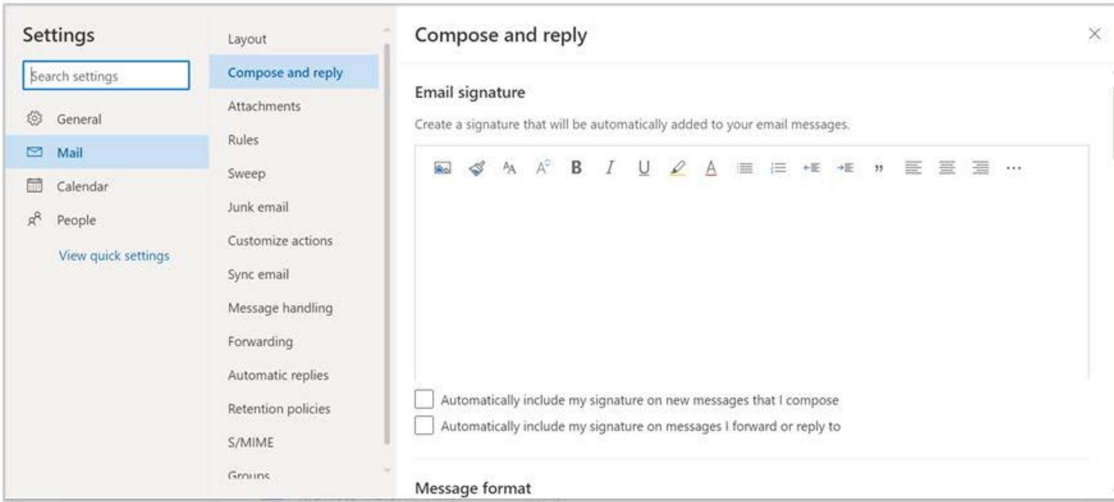
2. **Sign into Outlook in your web browser: www.outlook.office365.com.**

3. Once you are logged in, click the **Settings** icon on the top right of the screen:

4. Next, click **View all Outlook settings** at the bottom right of the grey box.

5. Then, click **Compose and reply** (second option shown below)



6. In the E-mail signature box, paste in the signature from the Word document.

7. Edit your **First Name, Last Name, Title, Phone Number, and new email address** to match the template fonts and colors exactly.

Do not alter the text for the new website or legal disclaimer.

8. **Select the two boxes shown below: Automatically include my signature on new messages I compose check box/on all messages I forward or reply to,** to display your email signature at the bottom of all outgoing email messages, including replies and forwards.

9. **The remaining of the Setting options are your choice.**

10. Select **Save** when you're done.

Trouble Shooting

If you have any questions on how to customize the e-signature or set it in Outlook, please reach out to the SitusAMC Service Desk at ServiceDesk@situsamc.com.

Setting Yourself Up for Success on Microsoft Teams

Setting Yourself Up for Success

For the last year or more, all of us have been intimately familiar with telecommuting whether we wanted to be or not. As restrictions associated with the pandemic start to loosen up, we are starting to think about returning to some of our former ways of working together. Whether you will continue to work remotely all of the time or only part of the time, telecommuting is bound to be in your future, one way or another.

Following are just a few guidelines, mostly related to how we show up for work – that help us to maintain our professionalism while telecommuting and help us maintain our competitive advantage in the marketplace. These guidelines increase the likelihood that we contribute successfully to our roles without unnecessary distractions.

Please refer to SitusAMC's Employee Handbook for our full Telecommuting Policy. And engage with your leader about specifics related to your department or to your unique situation.

Using Microsoft Teams

Start the call off right by thinking about who else will be on the call. If your call is with a trusted coworker that knows you and your work, you might have a little more flexibility, and they have a little more tolerance for any interruptions or distractions. If your call is with multiple participants or with others that are not as familiar with you and your work, it probably makes sense to take a few extra steps to have a near perfect call.

Following these guidelines can help make your Teams calls and telecommuting experiences the best they can be:

Use your camera/video whenever possible. The more opportunities we have for using multiple senses, the more likely we are to have not just good but great communication. When we cannot be in the same room with one another, our cameras on Teams meetings are the next best thing.

Tip 1: When on a video call, it is easy for others to notice if you are not paying attention. Plan ahead and focus on the speaker and your time together. Silence or set your cell phone aside. Make sure that if your cell phone is on vibrate, that too is not distracting – repeated buzzing or motion can be just as distracting as a ringer. Be fully present. Your colleagues will appreciate it and your communication will be better for it.

Tip 2: If you have noise-cancelling headphones available, use them. Your communication is likely to be clearer and this also might help you minimize some of the distractions listed below.

Tip 3: Instant message and chat are great tools; however, like anything, too much of a good thing can be distracting. Be thoughtful about using instant message or chat while on a call. If the sidebar conversation is important, chances are you should raise it to the whole group. And if it is not that important, it can wait. Think about whether your behavior would be different if you were gathered in a conference room. If a sidebar conversation in that setting would be distracting, it might be on a Teams call as well.

On the other hand, you may want to use the chat feature in a strategic manner to sideline but not lose issues or questions that would otherwise be disruptive and create crosstalk during a presentation.

Dress for work. As seasonal temperatures rise, the temptation might be to show up for your Teams call in your casual summer wear. Tempting as that is, remember, we are a group of business professionals operating a professional business. Wearing appropriate attire helps ensure your colleagues and others are focusing on what you have to say instead of being distracted by what you are wearing.

Again, consider your audience. If you are interacting on video calls with clients or other external parties, you may need to be more formal. If you are interacting with other SitusAMC employees, defer to our business casual guidelines as found in our Employee Handbook.

Tip: If you would not wear it into a SitusAMC office, you probably should not wear it on a Teams video call.

Beware and be aware of background distractions. Ideally, people should be focused on you and what you have to say. Whether you are on camera or off, several things can get in the way of that. We will tackle them one at a time.

Members of your household: During various stages of quarantine, childcare and school time have been severely disrupted and possibly disruptive for you if you share your household with little ones or not so little ones. When it is not possible to anticipate and totally balance the needs of others in your home with work-related calls, it might be helpful to share up-front with your teammates that you have some challenges but will do your best to make sure the call is not interrupted. When interruption is inevitable and parenting or attention to household members is required, mute your call, and go off camera, deal with the situation, and return to the call. Of course, if things are unmanageable, you may need to exit from the call and reconvene at a different time.

Tip: Try having a "Do Not Disturb" or "On a Call" sign to let family members know not to disrupt you unless an emergency.

Barking dogs and prowling cats: Like children, our pets often seem to sense when our attention is directed somewhere other than to them. As much as possible, anticipate your pet needs and plan accordingly and close doors, and more as appropriate. If disruptive, take a brief break from the camera and microphone, excuse yourself if needed, deal with the situation, then return to the call.

Tip: If you cannot separate yourself physically from a needy pet, consider keeping treats or toys handy to make sure your pet is occupied with something other than you.

Other noises. Having a call scheduled during your lunch or mealtime is likely to happen every now and then. If you are multitasking by eating and participating in a call, please be sure to mute your microphone and take yourself off of video.

Tip: In addition to the eating while calling warning, spare your audience the sniffles, sneezes, and coughs, too. Do everyone, including you, a favor by *keeping yourself on mute unless you are talking.* This is a good general rule, too.

Physical surroundings: Working during quarantine has necessitated a great degree of creativity when it comes to configuring your home office. You may be using your bedroom, living room, dining room table, kitchen counter, converted closet, or some other space as your dedicated work-from-home spot. Consider whether your bed, other furniture, wall décor, or other surroundings cast you in a professional light. If not, pick a neutral business background from Teams or blur your background using our branded template.

> **Tip:** Consider privacy, too. Will others have proximity to your computer screen or be able to hear your calls? Take necessary precautions to ensure privacy and compliance with our Information Security policies.

Pay attention to body language: Just as when we are in-person, our body language on a video call is an important part of effective communication. Be conscious of the signals that you might be sending or that others might be giving. Fidgeting hands and eyes glancing off camera may not only be distracting but may also signal that you are catching someone off guard or that they are unsure of themselves. Crossed arms may signal focus or anger or defensiveness. Put all of the cues together to determine whether you should pay attention to something or adjust your tone or message.

Using a gallery view that minimizes you on your own screen provides you with a better opportunity to observe the body language and cues from others. Start by giving others the benefit of the doubt and consider, that like you, they have the best of intentions for your time together.

Tip 1: Check out your camera placement. Is your camera positioned so that it is looking up your nose or just at your forehead? If so, make an adjustment, elevate or change the angle of our camera. Put your best face forward.

Tip 2: Check to see if your camera is too close or too far away from you. Being able to see all of your face aids in communication. Being on camera and seeing you talking may also be of great benefit to people with hearing impairments as it also allows them to read lips.

Tip 3: Remember to nod occasionally and to smile. These gestures and others show that you are attentive and engaged.

Start and end your meeting with class. Just like an in-person meeting, being on time and ready to go is important for a Teams meeting, too. And often, that is difficult when we have back-to-back meetings on our calendars. Likewise, being respectful of people's time and ending the meeting at the scheduled time is important, too. Here are a few tips for staying on track.

> ***In the beginning:*** Clearly state the agenda for the meeting. Think about and don't be afraid to share the following: Who are the intended participants and why? What do you hope to have as an outcome of the meeting? Is it necessary to capture notes or action items for future meetings or sharing with others?
>
> **Tip 1:** Assuming that everyone knows everyone else in the meeting can be problematic. If this is the first time for the group to meet, take a few minutes at the start to allow for introductions. This allows participants to associate not only a name with a face but also a name with a voice. Facilitating introductions is a good skill to have in your toolbox and goes a long way in improving communication between participants, making your meeting and future interactions more effective.
>
> **Tip 2:** If the agenda for your meeting has changed since you sent out the invitation, be sure and state that up front. This allows participants who do not have a direct or integral role in the issue at hand the option of staying on or excusing themselves from the call. You will have a more productive meeting and those who drop off will be able to attend to other value-added activities.

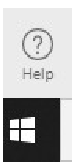
Tip 3: If some meeting participants are absent or others would benefit from what might happen on the call, consider recording it. Just be sure to let your participants know you are doing so.

At the end: Keep an eye on the time. As you near the end of the schedule time, allow a few minutes for wrap up, Q&A, assignments and next steps. Dismiss the group and say goodbye.

Tip 1: Thank your meeting attendees for their participation and contributions. A little appreciation fosters teamwork and encourages even more participants the next time you are together.

Tip 2: And if you have recorded the call or meeting, remember to post or share the video for those who might benefit.

Learn more about Teams. Do you want to know more tricks and tips for using Teams effectively? From any Teams page, look for the Help icon in the lower left-hand corner, just above the Windows start icon. When you click on the Help icon, you will be directed to Topics, Training and What's New. Each of these pages is packed with hopeful information, including videos, on how to navigate Teams, using polls, organization break out rooms, turning on close captioning during calls, and how to make the best of your Teams meeting.

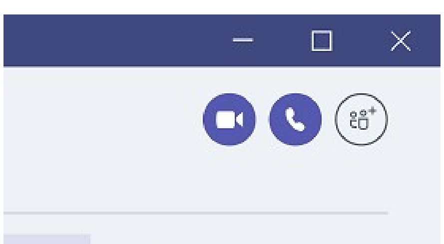


How to Start Calls, Set Up, and Check Voicemails in Microsoft Teams

How to Start a Call in Chat from Microsoft Teams

You can make one-on-one or group calls with anyone in your organization directly from a chat without having to host a team meeting. These calls are private and won't appear in any team conversation. Entries for the calls will appear in your chat, though.

- Go to your chat list and click **New chat**  to start a new conversation.
- Type the name or names into the **To** field at the top of your new chat.
- Then click **Video call**  or **Audio call**  to start a call.
- Up to 20 people can be on the same video call.

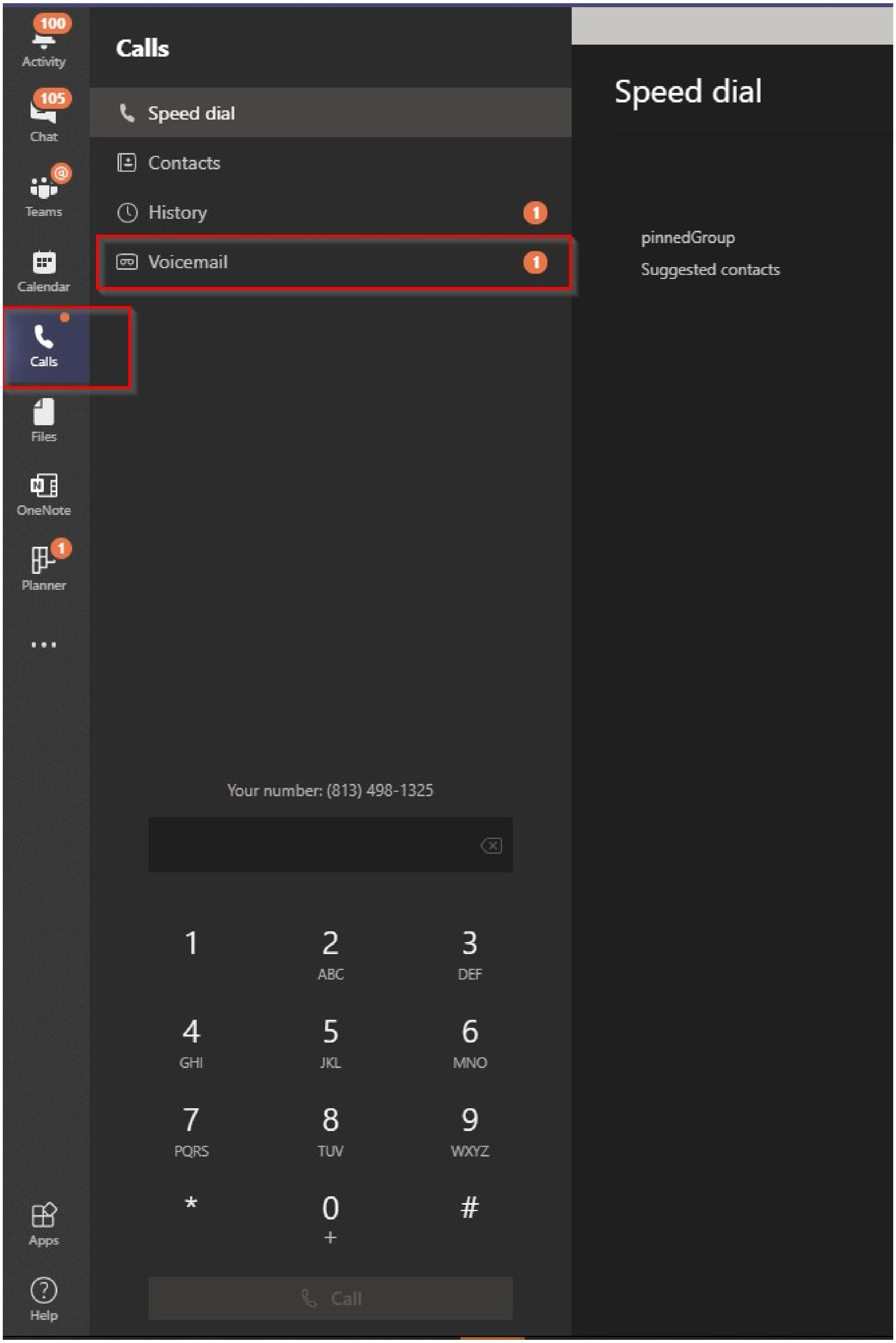


If you're not currently in a chat with the person you want to call, you can start a new call from a command. Go to the command box at the top of your screen and type **/call,** then type or select the name of the person you want to reach.

You can also start a one-on-one call from someone's profile card. Open it by clicking their picture in a channel or from a search.

How to Call a Phone Number from Teams

To dial a number from Teams, go to **Calls** , click **Dial a number,** and then enter the number of the person you want to reach by using the dial pad. Then click **Call** .


100
Activity
105
Chat
Teams
Calendar
Calls
Files
OneNote
1
Planner
Apps
Help
Calls
Speed dial
Contacts
History
1
Voicemail
1
Your number: (813) 498-1325
1
2
ABC
3
DEF
4
GHI
5
JKL
6
MNO
7
PQRS
8
TUV
9
WXYZ
*
0
+
#
Call
Speed dial
pinnedGroup
Suggested contacts

Here are a few other ways to make a call:

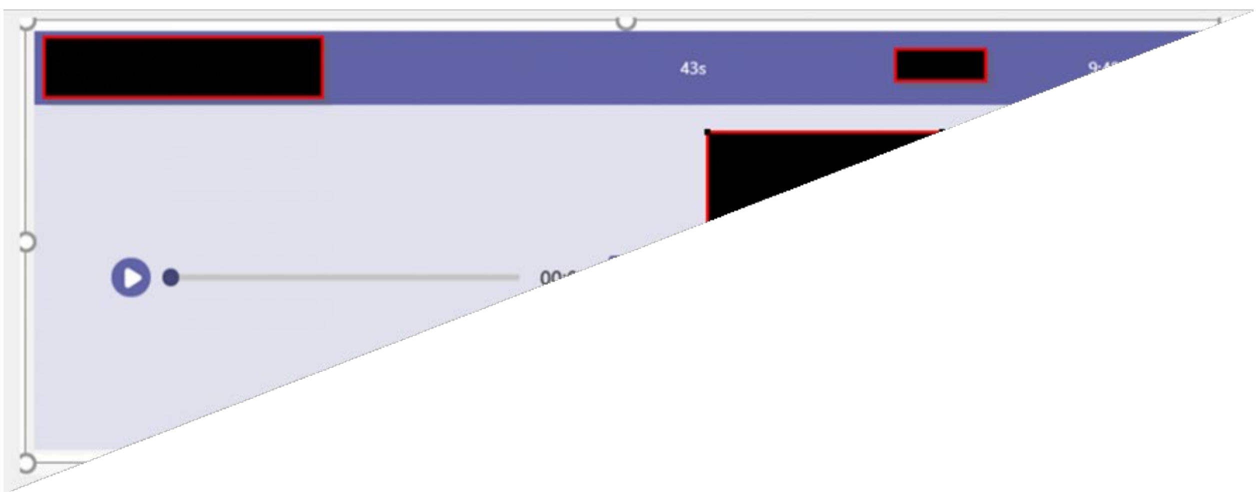
- If the person you want to reach is in your contacts list, click **Contacts,** find the person you want to call, and then click **Call** .
- If you've called people before (or if they've called you), they'll be in your call history. In **History,** select **More actions** *** to the right of the person's name, then click **Call back.**
- You can also access your voicemail and call people from that list. In **Voicemail,** select **More actions** *** to the right of the person's name, then click **Call back.**

To access your dial pad during a call, go to your call controls and select **Keypad** .

How to Check Your Voicemail in Teams

- Navigate to **Calls.**
- Select **Voicemail** from the list of panes on the left of the Teams window.

From here you'll be able to see a list of voicemails you've received. Clicking on a voicemail will give you the option to play the message, adjust playback speed, and see an automated transcription of the message.



- Use the Ellipsis icon to accomplish some helpful tasks like calling the message sender back, adding them to your contacts, and more.

Setting Up Your Voicemail Greeting

To set up your voicemail greeting in Teams,

- Click on your picture in the upper-right corner of Teams and choose **Settings** from the dropdown.
- Choose the **Calls** tab on the left of the flyout window.
- Under the **Voicemail** heading, you'll see a button titled **Change Voicemail Greeting.**
- This button will launch a call with the voicemail system where you can use the dial pad to navigate the automated menu and record your voicemail message.

Not Sure Your Voicemail Is Working?

One question a lot of new Teams users have is they're not sure if their voicemail is working because they haven't gotten a voicemail in a long time – even after recording their voicemail message.

This is usually solved by making sure your settings include sending calls to your voicemail. You can see in the screenshot below that under the **Call Answering Rules** heading, have Teams set to **"Do Nothing"** after 20 seconds of ringing. This is the default setting and will prevent any callers from landing at your voice mailbox.

To make sure your calls get to voicemail, change **Do Nothing** to **Voicemail,** and you can even choose how long you want calls to ring for before being sent there.