



Terms of Scheme v2.2

Summary

Our Colleague Reward Scheme is the way we reward you for referring our services to existing or potential clients.

We use the Colleague Reward 'Bread card' to make quick payments to you. The amounts you see are the amounts you get – the Company pays any tax and NI through payroll.

Definitions

'The scheme' is known as 'Colleague Reward Scheme'. 'The card' is known as 'Bread Card' or 'Virtual Bread Card Account'. Other references may have included (employee) referral scheme and card, incentive scheme and card.

The scheme (including payment amounts) is non-contractual and may be changed or removed by the Company at any time and without notice.

'Qualifying products' are the only products that a colleague will be paid for under the Colleague Reward Scheme. A full list of the qualifying products and their respective payment amounts can be found in the Colleague Rewards Price List. You can find this by visiting www.citation.co.uk/colleague-rewards-hub.

'Additional Service' means any qualifying product(s) added to an existing client service undertaking, apart from the ones where clause 7 applies.

'The Company' means Citation Limited and any Citation Group company. Other references may include, but are not limited to 'Citation', 'QMS', 'Citation Fire & Electrical', 'SMAS', 'EPM', 'Solution Host', 'EL Direct', 'HS Direct', 'Food Alert', 'Southalls', 'Xact' 'we', 'us' and 'our'.

'TCV' means total contract value.

'ACV' means annual contract value and is used to calculate payments for referrals with compliance product(s).

'Annual Audit Fee' is used to calculate payments for referrals with ISO products(s).

The card provider and your personal details

We use a 3rd party company to provide the scheme and ensure the payments go onto your account. The card provider is called Payment Card Solutions (UK) Ltd ('PCS'). We completed due diligence on PCS, so you can rest assured that your personal details are stored safely. In line with various Financial Services regulations, PCS needs to verify your identity (so we do need to provide them with your name, date of birth, gender, mobile phone, home address and Citation, ('company') email address). This is to protect you against fraud, meet regulatory requirements on money laundering legislation and anti-bribery legislation; to name but a few. For absolute clarity; PCS do not undertake credit checks, the card is not a credit card (you cannot go overdrawn and you will not be charged any interest) and it has no impact on your credit rating. PCS do not pass your details to anyone else or use it for marketing purposes. You can access, full and further information about PCS by clicking [here](#).

You have the right to opt-out of the scheme and for your data not to be processed in this manner. If you wish to opt-out, please send an email to breadcard@citation.co.uk advising of such and you will be removed from the scheme. Colleagues who opt out of the scheme can opt in at any time by emailing breadcard@citation.co.uk to request an account. All payments that become due from the date the card is activated will be paid.

Terms and conditions

1. Contractors or associates who are not paid via payroll are not eligible for the scheme due to tax and national insurance implications. Leads can be submitted via webform or Atlas (if applicable) but payments cannot be processed.
2. Sales roles (BDC's, BDM's and any role that receives commission payments for sales) are not eligible for the scheme.
3. All colleagues in non-Sales roles, apart from colleagues in roles defined in clauses 1 and 2, are eligible for the scheme. Colleagues in support roles (e.g. IT, internal HR, Finance and Marketing) and Directors will be eligible for online accounts only (virtual Bread card account) and will not be issued with a physical card. Colleagues eligible for virtual Bread card will be registered with an online account (virtual Bread card account) when first payment is due.
4. The scheme is the only route for processing colleague referral and reward payments, and you will not be eligible for any payments outside of this mechanism.
5. Only referrals submitted via Colleague Referrals webform (www.citation.co.uk/colleague-rewards), directly from Atlas or the 'On-Site direct referral form' will be eligible for payment and only when referring a qualifying product featured in the scheme.
6. 'On-Site direct referral' is a separate scheme with its own terms and conditions and is available to colleagues in Health & Safety and Employment Law & HR service teams only.
7. Citation or QMS clients who are within 12 months of a renewal date are exempt from referral payments for any additional services. These will be treated as early renewals.
8. All payment will be made via the Bread Card or Virtual Bread Card Account (please allow 5 working days for payment).
9. Any queries regarding payment should be raised to breadcard@citation.co.uk within 4 weeks of the opportunity being closed.
10. When a referral is for multiple sites, a single payment will be made for the deal if applicable.
11. When a referral is for multiple qualifying products a single payment will be made for the deal (if applicable) and the amount due will be paid on the highest value qualifying product only.
12. In the event of an overpayment, you shall repay the money within 5 working days.
13. Promoting good behaviour is very important to us and we will not tolerate colleagues taking referrals from clients/colleagues and claiming them as their own; or circumnavigating this scheme. Disciplinary action may be taken for any breach of this and payments will not be made in those circumstances.
14. Where more than one colleague submits the same referral, valid referrals will be paid on a first come, first served basis (based upon the date and time stamp of the original referral via the website).
15. When both a client and a colleague submit the same referral, the client referral will be deemed the only source and only the client will receive the referral fee, apart from joint client colleague referrals.
16. In the event of termination of a colleague's employment, regardless of the reason, the Bread card or Virtual Bread Card Account will be deactivated 7 calendar days after the date of termination. The colleague will have no rights to access any money remaining on the Bread card or Virtual Bread Card account thereafter.
17. Cash may not be withdrawn from the card.
18. The scheme is not contractual and does not form part of your terms and conditions of employment, or your pay.
19. Payments should not be regarded as guaranteed, regular or part of your pay. The scheme is run entirely at the discretion of the Company, and the Company reserves the right to amend or cancel the scheme at any time without notice or reason.
20. If amendments to the scheme impact payment values the amounts paid are those applicable at the time of payment and not the lead creation date.
21. The Company undertakes to operate the scheme fairly and consistently, according to the rules, and will not reduce, delay or withhold the payment to individuals other than for the reasons laid down in the rules.
22. Payments offered and paid under the scheme are not pensionable.
23. There is no right of appeal on payments made under this scheme.
24. By participating in the scheme, you accept the rules and agree to abide by them.