

EQS Compliance Cockpit: Description of Services

– Add-On Services

This Description of Services (“DOS”) applies to Customers that have purchased Add-On Services. This DOS forms an integral part of the Agreement between Customer and EQS Group. Capitalized terms used but not defined in this DOS are as defined in the Agreement between Customer and EQS Group. In the event of any conflict between this DOS and the Agreement, the DOS will prevail.

This DOS applies only to the Add-On Service(s) purchased by Customer and further described in the applicable Annex(es).

1. Objective

The purpose of this DOS is to describe the professional services (“Professional Services”) EQS Group will provide to Customer in connection with purchased Add-On Services, as further defined in the applicable Annex(es), including the scope of services, delivery approach, and responsibilities of each party.

2. Scope

EQS Group will provide the Add-On Services purchased by Customer as set out in the applicable service order and further described in the applicable Annex(es) to this DOS. The specific scope, deliverables, delivery approach, timeline, and Customer responsibilities for each Add-On Service are defined in the applicable Annex. Add-On Services may include configuration support, enablement, advisory support, technical assistance, or other defined professional services related to Customer’s use of the applicable EQS Cloud Services. The Professional Services will be delivered remotely unless otherwise agreed in writing. Any services not described in the applicable Annex will require a Change Request or separate written agreement.

3. Customer Responsibilities

Customer undertakes to cooperate unreservedly and in good faith with EQS Group, in particular with regard to the deadlines and conditions agreed between the Parties. Successful delivery of the Professional Services is dependent on Customer’s active engagement, timely completion of prerequisites, and completion of Customer-owned activities. As a central requirement under this DOS, Customer shall:

- 3.1. provide all information, requirements, and inputs as reasonably needed to ensure EQS Group has the insight necessary to perform the Professional Services, in EQS Group’s specified format and within the agreed timelines;
- 3.2. schedule, attend, and actively participate in all sessions, and complete prerequisites and follow-up actions where identified;
- 3.3. complete Customer-owned activities in Customer’s environment, including any Customer-side configuration, testing, validation, content preparation, or technical setup activities identified in this DOS or the applicable Annex(es);
- 3.4. manage rollout activities for Customer’s organization, including change management and training of Customer’s end users;
- 3.5. make (and timely communicate) all decisions, approvals, and sign-offs reasonably required to ensure the Professional Services are delivered efficiently and in accordance with the agreed timeline;
- 3.6. provide any required translations and localized content, where applicable (unless otherwise expressly included in the applicable Annex(es));
- 3.7. permit or procure that EQS Group shall have access to Customer’s premises (if applicable), and provide the necessary information and documentation as well as access to systems, computer facilities, and/or test instances of systems to be integrated; and
- 3.8. use commercially reasonable efforts to assist EQS Group in all other ways reasonably required for delivery of the Professional Services.

Failure to meet responsibilities

In case Customer does not fulfill these obligations in a reasonable time or quality, EQS Group shall not be responsible for any resulting delay, rework, or costs with regard to the affected Professional Services. Waiting times of EQS Group implementation managers caused by Customer not meeting its obligations under this DOS

will be invoiced to Customer based on EQS Group's standard hourly rates. EQS Group shall be entitled to reassign its implementation managers to other customers in case of significant delays caused by Customer.

4. Change Request Process

- 4.1. At any time during performance of the Professional Services, Customer may request, or EQS Group may recommend, a change to the scope, deliverables, timeline, assumptions, responsibilities, or other terms of this DOS (each, a "Change Request"). Such Change Request shall follow the procedure set out below:
- 4.2. The requesting party will submit the Change Request in writing to the other party, describing the requested change in reasonable detail.
- 4.3. The other party will assess the Change Request and provide a written impact assessment, which may include adjustments to scope, timeline, and/or fees.
- 4.4. EQS Group will have no obligation to perform work associated with a Change Request unless and until the Parties agree to the Change Request in writing.
- 4.5. Unless and until a Change Request is executed, EQS Group will continue to perform the Professional Services in accordance with this DOS.

5. Acceptance Procedure

- 5.1. The Professional Services will be deemed complete when EQS Group has completed the Add-On Service activities and deliverables expressly described in the applicable Annex(es).
- 5.2. Customer acceptance will be deemed to have occurred upon the earliest of: (i) Customer's written confirmation that the applicable Add-On Service is complete; (ii) Customer's use of the applicable deliverable, configuration, or output in production; or (iii) ten (10) business days after EQS Group's written notice of completion, unless Customer provides written notice describing a material non-conformance with the scope expressly defined in the applicable Annex.
- 5.3. For clarity, Customer's general use, configuration, rollout, or adoption of the applicable EQS Cloud Services will not delay or condition acceptance of the completed Add-On Service, unless expressly stated otherwise in the applicable Annex.

6. Assumptions

The scope of the Professional Services provided under this DOS and related fixed fee arrangement are subject to the assumptions below (the "Assumptions"). Deviations from these Assumptions will lead to changes in the timeline, scope and/or increases in the price and will be addressed through the Change Request process.

- 6.1. **Compliance and configuration decisions.** Alignment of configuration and process workflows with applicable laws, regulations, and/or Customer policies is Customer's responsibility. Configuration decisions and approvals are the responsibility of Customer. Professional Services, materials, or information provided by EQS Group are not intended, and should not be taken, as legal advice, and do not guarantee compliance with applicable laws and regulations.
- 6.2. **Scope control and change management.** Customer and EQS Group will work closely to maintain alignment to the scope set forth in this DOS. Any changes to scope will be managed through the Change Request process. Delays or deviations caused by acts or omissions within Customer's reasonable control may result in resource reassignment, timeline impacts, and/or additional costs.
- 6.3. **Holds.** If Customer places the Professional Services on hold for any reason, the same EQS Group personnel may not be available when Customer is ready to resume. The Professional Services are intended to be delivered on a continuous cadence; extended gaps may require rescheduling and may impact availability and timeline.
- 6.4. **Out-of-scope work.** The scope of this DOS excludes any Professional Services or activities not expressly set forth herein or in the applicable Annex(es).
- 6.5. **Testing limitations.** Load testing, stress testing, penetration testing, and volume testing are not planned as part of this DOS and are not permitted in Customer's environment(s) hosting the Cloud Services. Any such testing must be performed in a designated testing environment and pursuant to mutual written agreement of the Parties.
- 6.6. **Travel.** The Professional Services fixed fee does not include travel. Any required on-site travel will be mutually agreed in advance and billed to Customer.
- 6.7. **Support after services.** Upon completion of the Professional Services outlined in this DOS, ongoing support will be provided through EQS Group Support in accordance with Customer's applicable support terms. Ongoing support services are outside the scope of this DOS.

- 6.8. **Sandbox / environment replication.** If Customer has purchased a sandbox environment, any re-creation or duplication of configuration, or migration of data between sandbox and production, is Customer's responsibility unless otherwise expressly included in this DOS or the applicable Annex(es).
- 6.9. **Customer inputs.** Customer will provide all required information, content, and inputs in EQS Group's specified format and within agreed timelines.
- 6.10. **Translations.** Customer is responsible for providing, configuring, and loading any required translations and localized content unless otherwise expressly included in an applicable Annex.
- 6.11. **Historical data.** Migration of historical data into EQS Group Cloud Services is not included unless otherwise expressly included in an applicable Annex.
- 6.12. **Integrations.** Support for integrations with third-party systems is not included unless otherwise expressly included in an applicable Annex.
- 6.13. **DataSync / user provisioning.** Support for automated user provisioning or HR data integration via DataSync is not included unless otherwise expressly included in an applicable Annex. Unless such support is expressly included, Customer is responsible for user provisioning, including manual user creation and/or use of the Bulk User Import tool, as applicable.
- 6.14. **Single Sign-On (SSO).** If Customer elects to implement Single Sign-On ("SSO"), Customer is responsible for its identity provider configuration and for providing appropriate IT resources for the setup process. EQS Group will provide guidance only within standard SSO configuration capabilities, unless otherwise expressly included in an applicable Annex.
- 6.15. **Environment used for delivery.** Unless otherwise agreed in writing, Professional Services will be performed in Customer's production environment. Customer is responsible for maintaining appropriate access and approvals for EQS Group to perform the Professional Services.
- 6.16. **Custom development and reporting.** Custom development (including custom code or product enhancements) and custom reporting/dashboard development are not included as part of this DOS unless otherwise expressly included in an applicable Annex or separate written agreement of the Parties.

7. Term

The Professional Services described herein expire six (6) months after the Start Date set out in the Agreement ("DOS Term"). If Customer's subscription to the applicable Cloud Services expires or is terminated before the end of the DOS Term, this DOS will automatically terminate, and EQS Group will have no obligation to deliver the Professional Services described herein. No refunds will be provided.

8. Payment Terms

- 8.1. All Professional Services outlined in this DOS shall be performed on a fixed fee basis as set out in the Agreement ("Total Price"), excluding travel and expenses.
- 8.2. Fees shall be billed in advance upon execution of the Agreement and shall be payable net fourteen (14) calendar days from the date of EQS Group's invoices.

Annex 1

DataSync Enablement (SCIM or SFTP)

1. Applies To

EQS Compliance Cockpit modules where HR DataSync is purchased and supported.

2. Included Scope

EQS Group will provide up to two (2) remote workshops of up to one (1) hour each to support Customer's enablement of supported DataSync functionality.

- Workshop 1 – DataSync Overview & Requirements: review supported DataSync methods, prerequisites, recommended approach based on Customer's source system and user provisioning strategy, required user attributes, SCIM payload expectations, and roles and responsibilities.
- Workshop 2 – Q&A / Troubleshooting & Validation Support: review Customer progress, answer questions related to Customer-led setup, and provide troubleshooting guidance for common setup issues such as attribute mapping, file formatting, and validation steps.

DataSync support under this add-on is limited to:

- SCIM; and
- SFTP-based flat file ingestion, whether manual or scheduled

3. Customer Responsibilities

- Provide appropriate IT resources and technical owners for HR/user provisioning and related source systems.
- Confirm the source system(s) of record.
- Prepare and maintain HR/user data, including required attributes and access-related information.
- Complete configuration on Customer-controlled systems, including HRIS, SCIM setup, SFTP delivery, network approvals, and security approvals.
- For SFTP-based DataSync, provide and maintain a Customer-controlled SFTP server and/or file delivery mechanism, including credentials, connectivity, and required approvals.
- Execute testing and validation of provisioning and attribute updates in Customer's environment.

4. Out of Scope

- EQS-led build or implementation of SCIM connectors, SFTP pipelines, custom scripts, or third-party tooling
- Provisioning, hosting, operating, or managing an SFTP server or endpoint for Customer
- Custom development, bespoke mapping logic, or data transformation beyond standard guidance
- Full end-to-end integration project management beyond the included workshops
- Ongoing monitoring, operational support, or troubleshooting beyond the included workshops

Annex 2

Single Sign-On (SSO) Enablement

1. Applies To

EQS Compliance Cockpit where SSO is supported.

2. Included Scope

EQS Group will provide up to two (2) remote workshops of up to one (1) hour each to support Customer's enablement of supported SSO functionality.

- Workshop 1 – SSO Overview & Requirements: review supported SSO methods, prerequisites, recommended approach based on Customer's identity provider and authentication strategy, required attributes/claims, required metadata/configuration inputs, and roles and responsibilities.
- Workshop 2 – Q&A / Troubleshooting & Validation Support: review Customer progress, answer questions related to Customer-led setup, and provide troubleshooting guidance for common setup issues such as claim mapping, metadata validation, and login testing.

SSO support under this add-on is limited to enablement guidance, prerequisite review, configuration validation support, and troubleshooting guidance for Customer-led setup using supported EQS authentication methods and standard configuration approaches.

3. Customer Responsibilities

- Provide appropriate IT resources and technical owners for identity and authentication.
- Confirm the identity provider(s) of record and authentication strategy.
- Prepare and maintain all required SSO inputs, including claims, metadata, certificates, URLs, and related access/authentication information.
- Complete configuration in Compliance Cockpit and Customer-controlled systems, including the identity provider, network/security approvals, access policies, and authentication settings.
- Execute testing and validation of user authentication and login behavior in Customer's environment.

4. Out of Scope

- EQS-led build or implementation of Customer's identity provider, access management tooling, or third-party authentication services.
- Custom authentication flows, non-standard authentication methods, or bespoke mapping/configuration logic beyond standard guidance
- Full end-to-end integration project management beyond the included workshops
- Ongoing monitoring, operational support, or troubleshooting beyond the included workshops
- Third-party vendor coordination beyond reasonable guidance during scheduled sessions

Annex 3

Custom Email Domain Enablement

1. Applies To

Integrity Hub.

2. Included Scope

- Up to two (2) remote workshops to support Customer's planning and enablement for a supported Custom Email Domain configuration.
- Review of the supported setup approach, prerequisites, required Customer-owned setup activities, and roles and responsibilities
- Validation support and troubleshooting guidance for Customer-led setup within standard product capabilities
- Configuration of the EQS-controlled settings required to support the purchased Custom Email Domain functionality for the applicable purchased module

3. Customer Responsibilities

- Confirm domain ownership and provide the final domain to be used
- Complete all DNS, mail authentication, provider-side, security, and internal IT approvals required for the setup
- Complete all changes on Customer-controlled systems and with Customer-controlled providers
- Provide all required technical inputs and participate in testing and validation

4. Out of Scope

- EQS-led execution of Customer-controlled domain, DNS, mail infrastructure, or provider-side changes
- Unsupported email setup, non-standard configuration, or advanced deliverability consulting
- Custom development or extended implementation services beyond enablement and validation support

Annex 4

Translation Loading Support

1. Applies To

EQS Compliance Cockpit modules where EQS supports loading Customer-provided translations.

2. Included Scope

- Review of one submitted set of Customer-provided translation files for required format and completeness
- Loading of Customer-provided translations for supported configuration elements within the purchased module(s), such as supported portal, intake, or notification content
- Basic validation to confirm successful import or configuration
- One consolidated correction cycle for loading issues within the agreed scope
- Translation Loading Support is provided for the purchased language quantity or tier set forth in the applicable ordering document

3. Customer Responsibilities

- Provide complete, accurate, and final translations in the required EQS format or template.
- Ensure all submitted content is approved for loading.
- Confirm which supported items are to be translated and loaded.
- Review loaded translations and provide consolidated feedback.

4. Out of Scope

- Translation creation, translation editing, linguistic review, or copywriting
- Repeated rework caused by incomplete, invalid, or changing Customer files
- Ongoing future translation updates unless separately purchased
- Unsupported product areas or unsupported translation formats

Annex 5

Supplemental Training

1. Applies To

EQS Compliance Cockpit implementation or post-go-live services engagements where additional Customer training is purchased for the associated purchased module(s).

2. Included Scope

- Up to three (3) remote training sessions of up to one (1) hour each
- Training for Customer administrators, power users, and/or designated end users for the purchased module(s), as agreed in advance
- Review of standard product functionality, module administration, configured processes, reporting basics, or user workflows for the purchased module(s), within the scope of the purchased EQS services and standard product capabilities
- Q&A during the scheduled training sessions related to the covered training topics

3. Customer Responsibilities

- Identify the intended audience and requested training topics in advance of the scheduled sessions.
- Ensure appropriate attendees are available for the training sessions.
- Provide any Customer-specific process information, internal procedures, or approved content that Customer wants reflected during the training.
- Consolidate questions and feedback for discussion during the scheduled sessions.

4. Out of Scope

- Custom curriculum development, custom training materials, or Customer-specific documentation creation
- Translation services, interpretation, or multilingual delivery unless separately agreed in writing
- EQS-led configuration, implementation, or remediation work performed instead of training
- Broad end-user rollout management or train-the-trainer program development beyond the three (3) included sessions
- Additional sessions beyond the three (3) included one-hour sessions require separate purchase or written agreement.

Annex 6

Call Center – Shared Lines Setup with CAP

1. Applies To

EQS Integrity Line.

2. Included Scope

EQS Group will configure the purchased shared phone line setup for Customer's Integrity Line environment using supported standard configuration options. The Included Scope consists of:

- Configuration of the applicable shared phone line settings
- Assignment and confirmation of the applicable Company Access PIN (CAP), where required for the purchased shared line service
- Landing page setup with the applicable phone numbers
- Testing template and follow-up support to validate phone line functionality

3. Customer Responsibilities

- Confirm required country coverage and phone line selection.
- Provide required content inputs.
- Perform functional testing and confirm readiness.

4. Out of Scope

- Non-standard telephony requirements
- Ongoing call center operations
- Translation creation or copywriting
- Expanded routing or configuration beyond the purchased shared line setup

Annex 7

Call Center – Dedicated Phone Line Setup

1. Applies To

EQS Integrity Line.

2. Included Scope

EQS Group will configure the purchased dedicated phone line setup for Customer's Integrity Line environment using supported standard configuration options and Customer-provided approved scripts. The Included Scope consists of:

- Dedicated phone line configuration
- Setup of approved greeting configuration in supported purchased language(s)
- Landing page setup with the applicable phone numbers
- Testing template and follow-up support to validate phone line functionality

3. Customer Responsibilities

- Confirm required country coverage and line requirements.
- Provide approved scripts and content.
- Perform functional testing and confirm readiness.

4. Out of Scope

- Ongoing phone line operations
- Translation creation
- Changes beyond the approved scripts and agreed scope
- Expanded IVR or call routing design

Annex 8

Call Center – Additional Language for Dedicated Phone Line

1. Applies To

EQS Integrity Line; requires an existing dedicated phone line setup.

2. Included Scope

EQS Group will configure one (1) additional language greeting for Customer's existing dedicated phone line setup, using Customer-provided approved translated scripts. The Included Scope consists of:

- Configuration of one (1) additional language greeting for the existing dedicated phone line
- Greeting setup and validation support
- Testing guidance for Customer's validation of the additional language greeting.

3. Customer Responsibilities

- Provide approved translated scripts.
- Perform testing from the required regions and phone numbers.

4. Out of Scope

- Translation creation
- Re-recordings caused by Customer content changes after approval
- IVR redesign or expanded call routing logic
- Additional language additions beyond the one (1) language included in this add-on

Annex 9

Automated Message Service Setup

1. Applies To

EQS Integrity Line where Automated Message Service is purchased and supported.

2. Included Scope

- Activation of the purchased country-specific phone numbers for Customer's Integrity Line environment.
- Assignment and confirmation of the applicable Company Access PIN (CAP)
- Configuration of supported Automated Message Service settings within Integrity Line
- Configuration of the routing-related setup required for the purchased Automated Message Service phone numbers
- Support for Customer review, validation, and initial testing of the configured setup
- One consolidated feedback round within the agreed scope
- Basic handoff guidance for Customer administration of the supported Automated Message Service settings

3. Customer Responsibilities

- Confirm the purchased countries, routing requirements, and final setup requirements.
- Provide required content, configuration inputs, and approvals.
- Perform review, testing, and final sign-off.

4. Out of Scope

- Non-standard call flows, unsupported Automated Message Service configuration, or custom development
- Translation creation or copywriting
- Additional review cycles beyond the included consolidated feedback round
- Expanded implementation activities beyond the supported Automated Message Service setup

Annex 10

Additional Web Intake Form Configuration

1. Applies To

EQS Integrity Line.

2. Included Scope

- Creation and configuration of one (1) additional Web Intake form / URL beyond the base implementation scope
- Configuration of supported languages using Customer-provided content
- Upload of Customer-provided logo, header, and background image
- Application of one custom color scheme
- Inclusion of Customer-provided privacy policy, whistleblowing policy, legal notice, and intake form questions using supported product functionality
- One consolidated review and feedback cycle within the agreed scope

3. Customer Responsibilities

- Provide final content, branding assets, language content, and approved design inputs.
- Confirm the intended use case, audience, and configuration requirements for the additional form.
- Review and test the configured form and provide consolidated feedback.

4. Out of Scope

- Custom development
- Translation creation
- Extensive redesign
- Additional review cycles beyond the included consolidated feedback round
- Additional forms or broader web intake redesign beyond the one (1) additional form included in this add-on

Annex 11

Additional Reporting Tile Configuration

1. Applies To

EQS Integrity Line.

2. Included Scope

- Creation and configuration of one (1) additional reporting tile within the Web Intake portal
- Upload of Customer-provided tile title, description text, and icon
- Configuration of supported language content using Customer-provided inputs
- Linking of the reporting tile to the designated form bundle or related content
- One consolidated review and feedback cycle within the agreed scope

3. Customer Responsibilities

- Provide final tile title, description, icon, language content, and link target.
- Confirm the intended use case and portal placement for the tile.
- Review and test the configured tile and provide consolidated feedback.

4. Out of Scope

- Custom development
- Translation creation
- Extensive redesign
- Additional review cycles beyond the included consolidated feedback round
- Additional reporting tiles or broader portal redesign beyond the one (1) tile included in this add-on

Annex 12

Legacy Data Migration Services

1. Applies To

EQS Integrity Line / EQS Compliance Cockpit engagements where Customer purchases migration of legacy case data from a previous system into Compliance Cockpit.

2. Included Scope

- Provision of the EQS migration template and guidance for Customer-led mapping of historical data fields to EQS Integrity Line fields
- One mapping review cycle before Customer sign-off
- Upload of mapped sample data for Customer review:
 - to a sandbox or demo environment, if available; or
 - five (5) cases into production, if Customer does not have an active sandbox environment
- Upload of the fully approved mapped historical data into Customer's production environment.
- Attachment migration as a second migration phase, subject to the file requirements set out below
- Supported data may include the following, to the extent available in the legacy extract file:
 - Case ID, status,
 - created date,
 - closed date,
 - archived date,
 - conclusion,
 - substantiation,
 - closure summary,
 - classification,
 - severity,
 - country,
 - location,
 - department,
 - business unit,
 - folder group,
 - folder,
 - reporting channel,
 - anonymous reporter,
 - reporter name,
 - responsible case manager,
 - description, and
 - notes
- For Customers using the most recent version of the case tabs form builder, the migration may also include:
 - new or in-progress cases;
 - creation of the associated secure inbox with credentials in the user interface for the reporting party for those cases;
 - historical secure inbox communication, provided all secure inbox messages related to a single case are compiled into one consolidated entry per case; and
 - case custom fields
- The following technical limits apply:
 - data must reside in the extractable file itself and not in embedded or referenced attachments;
 - data without an existing Integrity Line field may be mapped into the Notes section, subject to a maximum of 32,767 characters;
 - migrated cases with a closed or archived status will not include creation of a secure inbox for the reporting party; and
 - each cell in the import template can hold a maximum of 32,767 characters

3. Customer Responsibilities

- Upload the historical data extract to a shared site for EQS access and review before mapping begins.
- Ensure all applicable EQS Integrity Line configuration is complete before the mapping process begins.
- Complete the field mapping using the EQS template, with EQS guidance.
- Review sample data and identify any mapping errors before final production upload.
- Provide timely approval for production upload.
- For attachment migration:
 - provide attachments in a single folder;
 - use the file naming format "CaseID__Filename"; and
 - ensure individual zip-formatted attachment files do not exceed 500 MB.

4. Out of Scope

- Additional mapping review rounds beyond the one (1) included review cycle
- Redesign or changes to Compliance Cockpit configuration to support the migration
- Creation of new configuration elements solely to support the migration
- Broader data transformation services beyond the agreed migration approach
- Separate testing cycles or user acceptance sessions beyond the sample review process described above
- Creation of custom dashboards or reports
- Unsupported data elements, including: audit logs; related or linked issues; case information gathered at the time of intake; involved parties other than the reporter; and retroactive case access or permissions from the legacy system

Annex 13

Case API Setup

1. Applies To

EQS Integrity Line where Case API is purchased and supported.

2. Included Scope

- Enablement of the supported Case API functionality in Customer's Integrity Line environment.
- Provision of the available Case API documentation and reference materials for Customer's technical team.
- One (1) remote demo and requirements session of up to one (1) hour covering the supported Case API functionality and required Customer-owned setup activities
- Up to two (2) remote Q&A / troubleshooting sessions of up to one (1) hour each to support Customer-led implementation and validation
- Support for Customer review, testing, and validation within the agreed scope

3. Customer Responsibilities

- Provide appropriate technical resources for the demo, setup, and testing activities.
- Create and manage the required API credentials.
- Complete all Customer-side system configuration, development, and integration activities required to connect Customer's internal systems to the Case API.
- Review the provided documentation and prepare questions for the scheduled sessions.
- Execute testing and validation in Customer's environment.

4. Out of Scope

- Custom integration development or Customer backend system implementation
- EQS-led build of Customer-side workflows, automation, or synchronization processes
- Creation or maintenance of Customer API clients, scripts, connectors, or third-party tooling
- Ongoing monitoring, operational support, or troubleshooting beyond the included sessions
- Additional sessions or expanded support beyond the scope described above

Annex 14

Advanced Case Management (ACM) Enablement

1. Applies To

EQS Integrity Line where Customer has purchased and is upgrading to or using Advanced Case Management ("ACM").

2. Included Scope

The Advanced Case Management (ACM) Services Add-On provides hands-on configuration and enablement support to establish a practical investigation framework in EQS Integrity Line. EQS will configure a default investigation procedure and one specialized procedure for a selected classification, including shared procedure forms and an additional specialized form, creating a repeatable foundation the Customer can maintain and extend independently. The Included Scope consists of:

- Up to four (4) remote working sessions led by an EQS Implementation Manager.
- Guided design support for the default and specialized investigation procedures.
- Configuration of the agreed procedures and forms in a sandbox environment.
 - Creation of a sandbox environment where one is not already available.
- Configuration support for up to two (2) investigation procedures:
 - One (1) default procedure for general use across cases.
 - One (1) specialized procedure assigned to a classification.
- Configuration support for up to four (4) stages per procedure.
- Configuration support for up to six (6) procedure forms:
 - Up to eight (8) questions per procedure form.
- Support to move the approved configuration from the sandbox environment into Production.
- Enablement on core ACM functionality including procedures, stages, forms, routing, and case access.
- Orientation to available Integrity Line AI features where purchased and enabled.
- Guidance on standard reporting and export functionality.
- One consolidated customer validation and update round.
- Enablement toolkit and handoff summary.

3. Customer Responsibilities

- Provide access to the sandbox and Production environments.
- Define your investigation process and reporting needs for each.
- Identify the classifications that should use the specialized procedure.
- Provide the questions, field wording, and response options for each procedure form.
- Validate and approve the configuration in the sandbox environment before it is moved to Production.
- Provide and upload translations where needed.
- Complete customer validation and consolidate feedback into one review round.
- Own end-user communications, broader training, rollout, and ongoing maintenance after handoff.

4. Out of Scope

- Formal project management or governance cadence.
- Operating model redesign or legal/policy advice.
- Translation of procedure or form content, including uploading or configuring customer-provided translations.
- Custom dashboards, reporting, integrations, or analytics.
- Broad end-user training or ongoing managed support.