



KAY NOTARY
& BUSINESS SERVICES LLC
— PROFESSIONAL. CONVENIENT. TRUSTED. —

OPERATIONS GUIDE

Document & Field Support Instructions

Courier, printing, scanning, secure PDF, administrative filing, and photo-verification
work

EFFECTIVE July 22, 2026	OWNER Operations	REVIEW CYCLE Quarterly
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Approved service scope

Document and field support covers administrative handling, delivery, reproduction, scanning, records organization, checklist-based observation, and basic photographs. It does not include legal drafting, process serving, investigation, appraisal, inspection certification, or professional opinion.

WRITTEN SCOPE FIRST

Every field assignment needs a named client, address, purpose, permitted activities, required deliverables, deadline, safety contact, and written fee approval before dispatch.

Intake and assignment controls

- Confirm the client is authorized to request access, delivery, photography, or document handling.
- Identify originals, copies, confidential records, required seals/signatures, and any do-not-open envelope.
- Record pickup and delivery contacts, identity-verification method, access hours, parking/toll expectations, and return instructions.
- Decline assignments involving trespass, deception, surveillance, confrontation, unsafe conditions, illegal materials, or an unauthorized legal conclusion.

Standard workflow

1. Open a job record and assign a unique reference number.
2. Confirm the approved quote and obtain the client's written scope and handling instructions.
3. At pickup, count items, note visible condition, identify sealed materials, and obtain a chain-of-custody acknowledgment when originals are involved.
4. Perform only the approved task. Keep originals attended or in secured storage; do not leave them in an unattended vehicle.
5. For scanning, verify page count, orientation, legibility, completeness, file name, and requested PDF security before transmission.
6. For field photos, capture only the approved subject and avoid unrelated people, license plates, interiors, or neighboring property unless the scope requires it.
7. Deliver through the agreed physical or secure electronic channel and obtain receipt.
8. Close the job with timestamps, disposition, expenses, exceptions, and final invoice.

Service-specific quality checks

Service	Required check	Do not do
Courier	Item count, seal condition, recipient identity, receipt	Open sealed documents or leave originals unattended
Printing	Correct file/version, size, color, duplex, page count	Print confidential files on an uncontrolled device
Scanning	Complete pages, readable image, correct order, secure delivery	Retain temporary copies longer than necessary
Field photos	Date, address, shot list, neutral captions	State value, code compliance, causation, or legal conclusion
Admin filing	Client-approved data and destination confirmation	Make legal/tax choices or sign for the client without authority

Pricing

Service	Price	Notes
Local document courier	\$45 + \$0.725/mile + postage	Pickup/delivery scope agreed in advance
Black-and-white printing	\$0.25/page	Legal size or high volume quoted separately
Color printing	\$0.75/page	Subject to equipment and volume
Scanning / secure PDF	\$15 first 50 pages	\$0.15 per additional page
Field photo verification	\$65 + \$0.725/mile	Basic checklist and photos; no appraisal
Administrative business support	From \$95 / quoted project	Non-legal coordination and records organization

Privacy, retention, and incidents

- Classify each job as public, internal, confidential, or restricted before storing files.

- Use the approved company repository. Personal email, consumer file-sharing links, and personal cloud accounts are prohibited.
- Delete working copies after verified delivery unless the service agreement or retention schedule requires them.
- Escalate missing pages, damaged originals, wrong-recipient delivery, exposed personal data, unsafe conditions, or client instructions that exceed the scope.