



## **PRIVACY POLICY AND PROCEDURE**

### **Tenets**

This Document governs the acquisition, storage, handling, retention, and destruction of Non-Public Personal Information (NPPI).

### **When receiving an e-document**

- ❖ Only the commissioned authority to who the email is intended will access and print the documents
- ❖ An open public Wi-Fi or unsecured network will never be used

### **When receiving a physical printed document**

- ❖ Only the commissioned authority to whom the physical printed documented is intended may receive the document
- ❖ If the package arrived open or torn, the contracting company will be contacted immediately
- ❖ Documents will be scanned for completeness without scrutiny

### **Receiving the Assignment**

- ❖ Only the commissioned authority to whom the confirmation email of the assignment is addressed may open and read the confirmation email.
- ❖ Communication will only occur with the named signers and/or the contracting company
- ❖ The signer will be properly identified on the phone before discussing NPPI
- ❖ NPPI will never be left in an email, text, or voice mail

### **Transporting Physical documents**

- ❖ Documents will be kept securely locked in the vehicle at all times
- ❖ If applicable, all document packages will be separated



### **During the Appointment**

- ❖ The identities of named signers will be identified before sharing documents
- ❖ Entries from previous notarizations will be covered before presenting to the signer to sign
- ❖ A photocopy of the signers' ID will only be collected if requested, Pictures of the IDs or documents will otherwise not be taken
- ❖ If applicable, If the signing is halted all documents will be collected and given to the legal custodian of the documents

### **At Appointment Completion**

- ❖ Documents will be checked for accuracy in the presence of signers
- ❖ If applicable, the signers' shipping package will be sealed in front of them
- ❖ If applicable, the completed/sealed document package will be handed off to the signers in person
- ❖ If applicable, a receipt for the signers' shipping package will be obtained from the shipping clerk
- ❖ Only a non-public, secured network will be used to complete the assignment

### **After the appointment**

- ❖ Electronic copies of documents will be deleted from the computer
- ❖ Confirmation records will be securely stored in electronic/hard copy form
- ❖ All physical documents left over from the appointment will be shredded