CLIENT POLICY / EFFECTIVE OCTOBER 27, 2026

Simple paperwork. Two signed sets.

Kept Covenant Legacy Solutions LLC, doing business as KCLS Concierge Services. Paper-first intake, consultation, enrollment and client-copy delivery.

1. Inquiry and intake

The owner reviews the online inquiry received through business email, emails the intake form and reviews the returned information. Clients may request help with paper completion. Collect only necessary service information; do not request Social Security numbers or payment-card information by email. Intake submission is not enrollment approval or a confirmed service appointment.

2. Phone and home consultation

Arrange the telephone consultation, then the home consultation. Complete the consultation form together. If both parties decide to proceed, complete the applicable enrollment documents, service plan and agreements at the home visit. Existing consultation fees and distance rules continue; disclose any fee in advance. Allow time for questions and do not pressure clients to sign.

3. Complete and sign two matching sets

Bring two copies of each applicable document requiring signatures. Complete both sets identically, resolve blanks and corrections, then have the client or verified legally authorized representative and KCLS sign and date each required signature. A payer or relative is not automatically authorized to sign. Do not sign for a client. No third-party signing platform, portal or client app is required.

4. Leave the client their copies

Leave one fully completed signed set with the client at signing and retain the other. Provide the handbook and applicable informational guides, recording the version and delivery date. Informational documents do not gain extra signature requirements. Provide applicable cancellation disclosures and required notices at execution; a copies-on-request rule does not replace required delivery. Additional copies follow the records policy.

5. Schedule and invoice

After approval and required enrollment, KCLS enters agreed visits in Square and Connecteam. Send the Square invoice by text or confirmed email; verify successful payment under existing deadlines. Electronic payment continues. This paper process does not alter rates, hours, scope, buffers, cancellation charges or approved payment arrangements.

INTERNAL PROCEDURE / RECORDS CONTROL

Scan. Verify. Secure.

Keep one original signed KCLS set and a verified digital record for every client. The client retains their own signed set.

6. Scan and check the KCLS set

Scan every completed page, including attached authorizations and continuation pages. Check legibility, page order, signatures, dates and completeness against the original. Reopen the saved file to confirm it is readable. Use client ID, document name and date in the filename; place the scan in the correct client folder. Do not silently alter executed documents; document corrections and obtain renewed consent where required.

7. Store originals and digital records

Store original signed paper documents in the client-specific file in locked storage. Keep blank masters separate. Store scans in approved, access-restricted business storage with appropriate encryption, unique accounts, MFA where supported, backups and access review. Do not use personal cloud accounts or unapproved devices. Transfer necessary intake email records into the approved client file; email is not the permanent record archive.

8. Copies, retention and disposal

Signed client copies are provided automatically at signing. For additional eligible records, verify identity and authority and aim to respond within five business days without routine copy fees. Use secure electronic delivery or paper as appropriate; log disclosures. Retain original records and scans at least seven years after services end, longer for applicable law or legal hold. This is the existing KCLS retention policy, not a statement of a universal legal minimum. Dispose securely only when retention and holds permit.

9. Ongoing summaries and acknowledgments

Maintain an internal record after each visit. Preserve the existing visit/weekly/monthly client-summary cadence unless otherwise agreed. Offer paper acknowledgment, provide a client copy and retain the original and scan. Preserve the five-calendar-day acknowledgment window. Administratively Finalized - No Acknowledgment Received does not mean signed, agreed or rights waived; missing acknowledgment does not determine future service eligibility.

10. Version and implementation controls

This policy replaces prior instructions requiring portal/name-field signing, routine return of emailed enrollment forms or mailing the first finalized copy later. It does not retroactively amend executed agreements. Apply appropriate notice and consent to material changes for existing clients. Retain historical records. No live website or system changes are made by this document. Verify applicability of Texas Business & Commerce Code Chapter 601 before home execution; provide required contract copies and cancellation notices when applicable.