

## General Data Protection Requirement Statement – May 2018

Data Controller: Andrea Jackson – Sole Trader

Trading Names: Moon Tree Yoga, Radiant Woman

Correspondence Address: Menagerie Bungalow, Skipwith Road, Escrick, York, YO19 6EH.

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This document sets out the measures I take to store, manage and process client information securely. During the course of my business, I will collect information about you in order that I can conduct my business professionally. Some of the information I collect is required by law, some to allow me to provide my business services to you, and some for marketing and promotion of the business. I have detailed below how your information will be used.

### 1. Contact information

Your telephone number, email address, social media or mobile application contact information in certain circumstances (ie if I have contacted you or you have contacted me) may be stored on an electronic device: mobile phone, laptop or tablet device. These devices are all password protected. I am the only person who knows the passwords to these devices. The responsibility for the effectiveness of the password security lies with the device or service provider.

**NOTE: Your contact information is the only information I hold about you on any electronic device.**

- a) Foremostly, your contact details are held for **Health & Safety** reasons, so that we have a means of contacting you to supply important information or in emergency situations. When relevant, I may ask you to supply the details of an emergency contact. Their information will also be treated as **Contact Information** as set out in our GDPR Policy.
- b) I may use your contact information to inform you of the business services I offer. This may be via text or email. For personal email communication, I use Gmail & sometimes Hotmail. These accounts are password protected and the effectiveness of the security and your data protection lies with email service provider. I only keep these communications as long as they are necessary and relevant. These communications are then deleted.
- c) Your email may be added to our newsletter and email marketing database. I use a 3<sup>rd</sup> party company to manage this process. I currently use Aweber.com. This account is password protected and effectiveness of the security and your data protection lies with service provider. The system is set for **double opt in** so that you must confirm you wish to receive emails and there is an **unsubscribe** link at the bottom of each of these emails to allow you to remove yourself from this database.
- d) Your contact information will be used to manage and carry out any bookings you make for the business services I offer. This enables me to meet my **contractual obligations** to you.

## 2. Client Notes, Health Details & Other Information

Depending on the services we provide to you, I may collect personal or sensitive information regarding your health, your general wellbeing and your internal processes (thoughts, emotions etc). Some of this information is collected on the company's standardised forms. Some as freely handwritten notes.

**NOTE: All this information is stored in paper format only. When not in use, these papers are stored in a locked filing cabinet at the above given address. I am the only person with access to this filing cabinet.**

- a) Foremostly, I require this information to ensure that I offer you appropriate services in a safe manner. This enables me to fulfil my **duty of care** to you as a customer.
- b) I also require this information for audit purposes for business insurances and for the professional registrations and licences I hold in the course of my business. These documents demonstrate that I operate my business professionally and in line with their **codes of conduct, ethics & good practice**.
- c) For group sessions, I ask that you complete a 'new client' form with essential information only. For more in depth work or for individual sessions I may ask for more detailed information and consent. This ensures the information I collect is **appropriate & relevant** to the service provided.

## 3. Financial Information

I **DO NOT** store any of your financial details or information. Any payments for bookings are processed by 3<sup>rd</sup> party companies. I currently use Paypal and the BACS banking system to process payments. These accounts are password protected and the effectiveness of the security and your data protection lies with the 3<sup>rd</sup> party service provider.

## 4. How Long Will I Hold Your Details?

To enable me to meet my **legal obligations** as a business, the length of time I store your information will vary as follows:

- a) Details I hold for marketing purposes will be kept and used until you ask for them to be removed. Upon receipt of such as request, your details will be removed at the very next opportunity. I aim to achieve this within 24 hours from receipt of the request.
- b) Booking information, registers and details of payments received (*but not transaction details see item 3 above*) will be kept as part of my **accounting & tax records** for a period of 7 years as required by law.
- c) Client Notes, Health Forms, Consent Forms, will also be kept for a period of 7 years following your last attended session. This provides an **audit trail** to ensure that the business operates in a safe and appropriate manner and is required as part of the business's **legal obligations**.
- d) Out of date documents are destroyed by burning on a log burning stove

## 5. Do I Share Your Information?

- a) I will never share your details with anyone outside of my business needs. The only exceptions being if required to do so by law, or as part of an audit required to meet the business's **professional obligations**, or if I employ the services of a 3<sup>rd</sup> party yoga teacher for class cover.
- b) In the case of class cover I will only share relevant information to ensure I maintain my **duty of care** to you as a customer.
- c) From time to time, I take part in joint events. In some situations I may need to share some of your information with the 3<sup>rd</sup> party to ensure we maintain our **contractual obligations** and **duty of care** to you as a customer. As far as I am able, I will always confirm that any external companies have committed to operating within the new Data Protection Laws.

## 6. Your Rights under Data Protection Laws

- a) You may request to have your contact information removed from our systems. In reality, this means we are only able to take your details out of our marketing database immediately. To uphold our **legal obligations** we must maintain your information in our client notes and accounting records until the relevant 7 year deadline expires.
  - b) You may request a copy of all the records we hold about you. We will process this information as quickly as possible and within the 30 day deadline. Where we are not able to do this we will contact you to explain the reasons why. We will not charge you for providing this information unless we receive multiple requests in a short space of time, when we reserve the right to charge a £5 administration fee.
  - c) You have the right to have your information corrected if it is inaccurate. This may not apply to certain documents, for example client notes, where your responses are recorded as accurately as possible at the time they were offered, or where the notes are subjective commentary made by the therapist.
  - d) You can request from the outset that we do not hold any information about you. However, practically this may prevent us from offering our services to you as we are legally obliged to maintain certain records.
  - e) You have the right to complain about how we have handled your information. In the first instance, please contact me using the contact details at the top of this document and I will endeavour to resolve your complaint quickly. If you are not satisfied, you can then refer your complaint to the Information Commissioners Office at [www.ICO.co.uk](http://www.ICO.co.uk)
7. I will always treat your information in the strictest confidence and with utmost respect. If you have any questions or wish to discuss the contents of this document, please get in touch using the contact details at the top of this document.