

DATA PROTECTION POLICY

CONTEXT AND OVERVIEW

KEY DETAILS

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Policy became operational on 27/02/2024

INTRODUCTION

Heanly Harris Limited needs to gather and use certain information about individuals.

These can include customers, suppliers, business contacts, employees and other people the organization has a relationship with or may need to contact.

This policy describes how this personal data must be collected, handled and stored to meet the company's data protection standards – and to comply with the law.

WHY THIS POLICY EXISTS

This data protection policy ensures Heanly Harris Limited

- Complies with data protection law and follow good practice
- Protects the rights of staff, customers and partners
- Is open about how it stores and processes individuals' data
- Protects itself from the risks of data breach

DATA PROTECTION LAW

The Data Protection Act 1998 describes how organisations including Heanly Harris Limited must collect, handle and store personal information.

These rules apply regardless of whether data is stored electronically, on paper or on other materials.

To comply with the law, personal information must be collected and used fairly, stored safely and not disclosed unlawfully.

The Data Protection Act is underpinned by eight important principles. These say that personal data must:

1. Be processed fairly and lawfully
2. Be obtained only for specific, lawful purposes
3. Be adequate, relevant and not excessive
4. Be accurate and kept up to date
5. Not be held for any longer than necessary
6. Processed in accordance with the rights of data subjects
7. Be protected in appropriate ways
8. Not be transferred outside of the European Economic Area, unless that country or territory also ensures the adequate level of protection

PEOPLE, RISKS AND RESPONSIBILITIES

POLICY SCOPE

This policy applies to:

- The head office of Heanly Harris Limited
- All staff of Heanly Harris Limited
- All contractors, suppliers and other people working on behalf of the company.

It applies to all the data the company holds relating to identifiable individuals, even if that information technically falls outside of the Data Protection Act 1998.

This can include:

- Names of individuals
- Postal addresses
- Email addresses
- Telephone numbers
- ...plus any other information relating to individuals

DATA PROTECTION RISKS

This Policy helps to protect Heanly Harris Limited from some very real data security risks, including:

- **Breaches of confidentiality.** Information being given out inappropriately
- **Failing to offer choice.** All individuals should be free to choose how the company uses data relating to them.
- **Reputational Damage.** The company could suffer if hackers successfully gained access to sensitive data.

RESPONSIBILITIES

Everyone who works for or with Heanly Harris Limited has some responsibility for ensuring data is collected, stored and handled appropriately.

Each employee that handles personal data must ensure that it is handled and processed in line with this policy and data protection principles.

Key areas of responsibility:

- The managing director is ultimately responsible for ensuring that Heanly Harris Limited meets its legal obligations.

Operations

- Keeping the MD updated about data protection responsibilities, risks and issues.
- Reviewing all data protection procedures and related policies, in line with an agreed schedule
- Arranging data protection training and advice for people covered by this policy.
- Handling data protection questions from staff and anyone else covered by this policy
- Dealing with requests from individuals to see the data Heanly Harris Limited holds about them (also called 'subject access requests').
- Checking and approving any contracts or agreements with third parties that may handle the company's sensitive data.

IT

- Ensuring all systems, services and equipment used for storing data meet acceptable security standards.
- Performing regular checks and scans to ensure security hardware and software is functioning properly.
- Evaluating any third-party services the company may use to store or process data. (i.e. cloud services)

Marketing

- Approving any data protection statements attached to communications such as emails and letters.
- Addressing any data protection queries from journalists or media outlets like newspapers.
- Where necessary, working with other staff to ensure marketing initiatives abide by data protection principles.

GENERAL STAFF GUIDELINES

- The only people able to access data covered by this policy should be those who **need it for work**.
- Data **should not be shared informally**. When access to confidential information is required, employees can request it from their line managers.
- **Heanly Harris Limited will provide training** to all employees to help them understand their responsibilities when handling data.
- Employees should keep all data secure, by taking sensible precautions and following guidelines below.
- In particular, **strong passwords must be used** and they should never be shared.
- Personal data **should not be disclosed** to unauthorized people, either within the company or externally.
- Data should be **regularly reviewed and updated** if it is found to be out of date. If no longer required, it should be deleted and disposed of.
- Employees **should request help** from their line manager if they are unsure about any aspect of data protection.

DATA STORAGE

These rules describe how and where data should be safely stored. Questions about storing data can be directed to the person in charge of IT.

When data is **stored on paper**, it should be kept in a secure place where unauthorized people cannot see it.

These guidelines also apply to data that is usually stored electronically but has been printed out for some reason:

- When not required, the paper or files should be kept **in a locked drawer or filing cabinet**.
- Employees should make sure paper and printouts are not left **where unauthorised people could see them**.
- **Data printouts should be shredded** and disposed of securely when no longer required.

When data is stored electronically, it must be protected from unauthorized access, accidental deletion and malicious hacking attempts:

- Data should be **protected by strong passwords** that are changed regularly and never shared between employees.
- If data is **stored on removable media** (like a CD or DVD), these should be kept locked away securely when not being used.
- Data should only be stored on **designated drives and servers**, and should only be uploaded to an **approved cloud computing services**.
- Servers containing personal data should be sited in a secure location, away from general office space.
- Data should be **backed up frequently**. Those backups should be tested regularly, in line with the company's standard backup procedures.
- Data should **never be saved directly** to laptops or other mobile devices like tablet or smart phones

- All servers and computers containing data should be protected by **approved security software and a firewall**.

DATA USE

Personal data is of no value to Heanly Harris Limited unless the business can make use of it. However, it is when personal data is accessed and used that it can be at the greatest risk of loss, corruption or theft.

- When working with personal data, employees should ensure **the screens of their computers are always locked** when left unattended.
- Personal data **should not be shared informally**. In particular, it should never be sent by email, as this form of communication is not secure.
- Data must be **encrypted before being transferred electronically**. Check the how to guide on how to send data to authorize external contacts.
- Personal data should **never be transferred outside of the European Economic Area (EEA)**
- Employees **should not save copies of personal data to their own computers**. Always access and update the central copy of any data.

DATA ACCURACY

The law requires Heanly Harris Limited to take reasonable steps to ensure data is kept accurate and up to date.

The more important it is that the personal data is accurate, the greater the effort Heanly Harris Limited will put into ensuring its accuracy.

It is the responsibility of all employees who work with data to take reasonable steps to ensure it is kept as accurate and up to date as possible.

- Data will be held in as **few as places as necessary**. Staff should not create any unnecessary additional data sets.
- Staff should **take every opportunity to ensure data is updated**. For instance, by confirming a customer's details when they call.
- Heanly Harris Limited will make it **easy for data subjects to update the information** it holds about them – i.e. via the company website.
- Data should be **updated as inaccuracies are discovered**. If a customer can no longer be reached on their stored telephone number, it should be removed from the database.
- **Marketing databases should be checked against industry suppression files** every six months.

SUBJECT ACCESS REQUESTS

All individuals who are the subject of personal data held by Heanly Harris Limited are entitled to:

- Ask **what information** the company holds about them and why.
- Ask **how to gain access** to it.
- Be **informed how to keep it up to date**.
- Be informed how the company is **meeting its data protection obligations**.

If an individual contacts the company requesting this information, this is called a subject access request.

Subject access requests from individuals should be made by email, addressed to enquiries@heanlyharris.co.uk. A form can be provided, although individuals do not need to use this.

Individuals will not be charged for a subject access request and a response to a SAR will be completed within 1 month.

The identity of the person requesting the SAR must be verified before handing over any information.

DISCLOSING DATA FOR OTHER REASONS

In certain circumstances, the Data Protection Act allows personal data to be disclosed to law enforcement agencies with the consent of the data subject.

Under these circumstances, Heanly Harris Limited will disclose requested data. However Heanly Harris Limited will ensure the request is legitimate, seeking legal advice if required.

PROVIDING INFORMATION

Heanly Harris Limited aims to ensure that individuals are aware that their data is being processed, and that they understand:

- How the data is being used.
- How to exercise their rights

To these ends, the company has a privacy statement, setting out how data relating to individuals is used by the company.

This is available on request. A version of this statement is also available on the company's website.