

AmyAssists

DATA PROTECTION & CONFIDENTIALITY POLICY

Effective from 31 August 2026 | Policy owner: Amy Hunter

My commitment

AmyAssists is committed to protecting every client's privacy, dignity and confidentiality. Personal information will only be collected and used when it is necessary, lawful and safe to do so.

1. Purpose

This policy explains how I collect, use, store, share and dispose of personal information in accordance with the UK General Data Protection Regulation (UK GDPR), the Data Protection Act 2018, the common law duty of confidentiality and other applicable UK data protection legislation.

AmyAssists operates as a sole-provider business. Amy Hunter is responsible for data protection and acts as the Data Controller for personal information held by the business.

2. Who this policy applies to

- Current and former clients
- Potential clients and people making enquiries
- Clients' relatives, representatives and emergency contacts
- Suppliers, professional contacts and anyone else whose information is held by AmyAssists

3. Information I may collect

I will only collect information that is relevant and reasonably necessary to provide services safely and effectively.

- Name, address, contact details and date of birth
- Emergency contacts, relatives and authorised representatives
- Agreed services, scheduled visits, access arrangements and key-holding information
- Relevant health, disability, mobility, allergy or support information
- Communication preferences, service plans, consultation forms and visit records
- Incident, accident, safeguarding, welfare, complaint and feedback records
- Payment, invoice, transaction and correspondence information

Health, disability and support information is special category personal data and receives additional protection. AmyAssists does not provide regulated personal care or medication administration. I will only record health information relevant to the safe delivery of agreed non-regulated services.

4. Data protection principles

Personal information will be:

- Processed lawfully, fairly and transparently
- Collected for clear and specific purposes
- Adequate, relevant and limited to what is necessary
- Accurate and kept up to date where required
- Kept only for as long as reasonably necessary

- Protected against unauthorised access, loss, damage or disclosure
- Handled in a way that demonstrates compliance with data protection law

5. Lawful reasons for using information

Depending on the circumstances, information may be processed because:

- It is necessary to provide requested services under a contract
- It is necessary to meet a legal obligation
- It is necessary to protect someone's vital interests in an emergency
- It is necessary for a legitimate business interest that does not unfairly override the person's rights
- The person has given clear consent

Where special category information is required, AmyAssists will identify an additional legal condition. This will normally be the client's explicit consent. In a genuine emergency, information may be used to protect vital interests where consent cannot reasonably be obtained.

Consent may be withdrawn at any time. This will not affect information already used lawfully, and some information may still need to be retained for legal obligations or claims.

6. Confidentiality

All personal information received by AmyAssists will be treated as confidential. I will not discuss a client's circumstances with friends, relatives, neighbours, other clients or anyone without a lawful and necessary reason to receive the information.

Client information will only be accessed or used to arrange or provide an agreed service; protect health, safety or welfare; maintain necessary business records; meet a legal, insurance or safeguarding responsibility; or respond to a complaint or claim.

Conversations about clients will not take place in public or where they could be overheard. Information about one client will never be left visible to another client.

7. Sharing information

AmyAssists will not sell personal information or share it for unrelated marketing. Information may be shared with an authorised person or relevant professional when the client has permitted it, it is necessary for the agreed service, there is a serious welfare concern, it is needed in an emergency, there is a legal requirement, or a safeguarding concern must be reported.

Only the minimum necessary information will be shared. Where safe and appropriate, I will inform the client first. Prior consent may not be possible where there is an immediate risk of serious harm, safeguarding concern, legal requirement or another lawful reason.

8. Paper records

- Kept in a secure folder or locked cabinet away from public or household access
- Removed from a client's home only when necessary and authorised
- Carried securely and never left visible or unattended in a vehicle
- Returned to secure storage promptly and shredded securely when no longer required
- Limited to the minimum personal information necessary

9. Electronic records and devices

Electronic information will be protected by appropriate measures, including:

- Passwords, PINs or biometric protection and device encryption where available
- Up-to-date software, security updates and two-step verification
- Separate business email accounts, secure backups and automatic screen locking

- No client information on shared or publicly accessible devices
- Secure deletion when information is no longer required

Passwords will not be shared or reused across important accounts. If a device is lost or stolen, I will act promptly to change passwords and remotely lock or erase it where possible.

10. Email, telephone and messaging

- Recipient details will be checked before personal information is sent
- Sensitive information will only be sent when necessary and appropriate security has been considered
- Group messages will not reveal clients' details to one another
- Voicemails and texts will contain the minimum necessary information
- Client information will not be discussed through social media accounts
- Photos, videos or recordings will not be taken or shared without a specific reason and prior permission, except where evidence must be preserved in an emergency or as required by law

11. Accuracy of information

I will take reasonable steps to keep information accurate and up to date. Clients or authorised representatives should tell AmyAssists about relevant changes to contact details, emergency contacts, access arrangements, health, mobility, safety or communication needs. Inaccurate information will be corrected without unnecessary delay.

12. How long information is kept

Information will not be retained longer than necessary. As a general guide:

- Enquiries that do not lead to services: normally up to 12 months
- Client agreements, service plans and essential visit records: normally up to 7 years after services end where required for insurance, complaints or legal claims
- Financial and tax records: normally 6 years after the relevant financial year, or longer if legally required
- Routine messages with no continuing need: deleted when no longer required
- Safeguarding, accident, incident or legal records: retained for an appropriate period based on the circumstances and relevant legal or insurance requirements

Records will be reviewed periodically. Information no longer required will be securely deleted or shredded.

13. Individual rights

Subject to the circumstances and legal exemptions, individuals may have the right to:

- Be informed about how their information is used
- Request access to their personal information
- Ask for inaccurate information to be corrected
- Ask for information to be erased or its use restricted
- Object to certain uses or request transfer of eligible information
- Withdraw consent where processing relies on consent
- Raise a concern about how their information is handled

Requests should be made to Amy Hunter. Identity may need to be confirmed before information is released. Requests will normally be handled within one month. A person is only entitled to their own information unless authorised to act for someone else.

14. Personal data breaches

A breach may include losing a file or device, sending information to the wrong person, unauthorised access, accidental disclosure, theft, destruction or loss. If a breach occurs, I will:

- Act immediately to contain it and protect those affected
- Change passwords or recover information where possible
- Record the event, assess the risk and document the action taken
- Notify the Information Commissioner's Office when legally required
- Inform affected people when the breach is likely to create a high risk
- Review procedures to reduce the chance of it happening again

A reportable breach will be reported to the Information Commissioner's Office without undue delay and, where possible, within 72 hours of becoming aware of it.

15. Concerns and complaints

Please contact **Amy Hunter, AmyAssists**

Telephone: 07435 690678

Email: info@amyassists.co.uk

I will investigate concerns and respond as soon as reasonably possible. Individuals may also contact the Information Commissioner's Office at **www.ico.org.uk** or **0303 123 1113**.

16. Policy review

This policy will be reviewed at least annually and whenever services, information-handling practices, technology, relevant law or official guidance changes.

Signed

Amy Hunter, AmyAssists

Date

Next review date

31 August 2027

Legal basis: UK GDPR, Data Protection Act 2018 and the common law duty of confidentiality. This document is general business wording and is not a substitute for individual legal advice.