

Privacy Policy – Client Information

1. Introduction

Professional Law Services Ltd (referred to throughout this policy as “Pro-law”) are an ethical business with a social imperative: therefore, we respect your privacy and in turn are committed to protecting personal data.

This privacy policy will inform you as to how we look after your personal data and tell you about your privacy rights when you become a client of Pro-law. This privacy notice also informs you on how to contact us or supervisory authorities if you have a complaint at any time.

This policy is effective from 1 June 2020.

2. General

This policy is to be read alongside our standard Terms of Business which will accompany your client engagement letter.

3. Purpose

The purpose of this privacy notice is to give you information on how Pro-law collects and processes your personal data, so you are aware of how and why we are using your data.

4. Controller/Contact details

Pro-law is the data controller and is responsible for your personal data. We are not required to have a Data Protection Officer. However, the director of Pro-law is responsible for the operation of this privacy policy and if you have any queries please do not hesitate to contact him using the details shown below.

You also have the right to make a complaint regarding the way we have used your data to the UK supervisory authority, the Information Commissioner’s Office (ICO). They can be contacted at <https://ico.org.uk/make-a-complaint> and by means of their Helpline 0303 123 1113.

However, we would appreciate the chance to deal with any concerns you may have when they arise so please do get in touch with us first.

Name of director: Ian Mason

Email address: ian.mason@prolawservices.uk

Postal address: Unit 22, Bude Business Centre, Bude, Cornwall EX23 8QN

Telephone number: 01288 255655

5. Changes to privacy policies

This privacy policy will be revised as may be necessary or desirable in the future. If changes are made, they will be posted on Pro-law’s website and if you are a current client at that time you will be informed of this. If your matter is completed, you will not receive this notification.

Any historic privacy notices will be archived and can be obtained by contacting us on the details above.

6. Data we collect about you and why we collect this data

Personal data, or personal information, means any information about you from which you can be identified. It does not include data where your identity has been removed. This is classed as anonymous data.

The data we collect may be held both on paper and digitally. Paper records are in a secure, locked office and digital records are held in the Cloud by direct arrangements with Microsoft 365 and indirectly with AWS (Amazon Web Services) through arrangements which are integral to our case management software, supplied by LEAP. AWS is a leading cloud services platform, providing database storage, content delivery and a range of other functions.

Both Microsoft and Amazon Web Services comply with European data protection regulations in their dealings with UK customers, though data may actually be transferred to and located on their servers situated outside the European Economic Area.

The reason we hold our clients' data is so that we can –

- perform the contract and provide the services required in connection with the matter in which we have been instructed
- comply with our legal and professional obligations as a business
- fulfil the terms of contracts we have with our own suppliers where they have a legitimate interest or lawful reason to request such data (for example, insurance)
- provide necessary information to third parties that we engage with in connection with our services to you
- to facilitate the provision of further services to you if we are instructed again in the future.

7. Types of data we may collect and use

We may collect, use, store and transfer different kinds of personal data about you over the course of advising you and carry out the service required which are as follows.

Identity Data – This type of data includes your first name, maiden name, last name, username or similar identifier, marital status, title, date of birth, gender, images, passport, driving licence, utility bills.

Contact/Electronic Data – This type of data includes billing address, delivery address, email address and telephone numbers.

Matter Data – This is the information which relates to the matter where you are engaging in our services. We will record conversations

Financial Data – This type of data includes bank account/building society information and payment card details. As well as information so we can undertake a credit or other financial check on you if applicable to the matter being carried out. We may also collect pension data where relevant to your matter.

Transaction Data – Includes details about payments to and from you and other details of services you have purchased from us.

Profile Data – Includes your username and password, purchases or orders made by you, your interests, preferences feedback and surveys.

Monitoring Data – If you visit our office your image may be recorded on CCTV for security purposes. Please note that Pro-law does not have CCTV but the Business Centre form which we work does. The Centre is operated by Cornwall Council, to whom any queries about that should be addressed.

National Insurance and tax details – We may need this type of data if this is relevant to the services we are providing.

Employment status/records – We may need to record your employment status including salary and benefits as well as employment records such as sickness, attendance, grievances and trade union

membership etc if you are to instruct us for a matter where this information is needed such as an employment dispute.

Please note that we do not normally collect any Special Categories of Personal Data about you. These include details of your race or ethnicity, religious or philosophical beliefs, sex life, sexual orientation, political opinions, trade union membership, information about your health, genetic and biometric data. However, this information may be collected and held if it is necessary to the matter we are engaged with on your behalf.

We do not normally collect any information about criminal convictions and offences unless this is necessary to the matter we are engaged with on your behalf.

8. Purposes for which we collect your personal data

Set out below is a table that outlines the reasons that we may obtain and process the types of data referred to above:

Type of data	Reason for collecting data	Lawful basis
Identity and contact data	In order to register you as a new customer	Contract – for performance of a contract with you.
Identity, contact, financial, transaction data	In order to manage any payments, fees and charges. In order to collect and recover any funds owed to us. To perform identification and anti-money laundering (AML) checks.	Contract – for performance of a contract with you. Legitimate interests – in order to recover debts due to us for services we have provided. Necessary – In order to comply with our own legal obligations
Identity, contact and profile	In order for management of our relationship with you i.e. notifying you of any changes or updates with your matter.	Contract – for performance of a contract with you Necessary – In order to comply with our own legal obligations Legitimate interests – Necessary for our legitimate interests in order to keep files updated.
Identity and contact data	In order to offer appropriate future services	Legitimate interests – Necessary in order to provide you with relevant information Vital interests – very rare.
Matter data	In order to carry out the service you have requested.	Contract – for performance of a contract with you. Legitimate interests – Necessary in order to perform work for you as requested.
Monitoring data	Security process CCTV	Legitimate interests – to ensure the safety of us and yourself Vital interests – if an incident is to occur this CCTV can be used as evidence.
NI and Tax details	In order to carry out the service you have requested i.e an employment dispute	Legitimate interest – to ensure we can give you the best service we can Contract – for performance of a contract with you.
Employment details	In order to carry out the service you have requested e.g. an employment dispute	Legitimate interest – providing a service Contract – for performance of a contact with you.

9. How we collect your data

We will, or may, collect your data in the following ways:

- From public sources such as Companies House or HM Land Registry
- Directly from a third party such as credit reference agencies (if needed for the matter)
- From a third party with your consent in place such as banks, building societies or other professionals that we may work alongside.
- Via our website contact form with information you provide
- Through the telephone and telephone messages
- Through email correspondence
- Through your presence at the office and face to face meetings held either at our office or elsewhere
- Through letters and related documents provided by you.

10. Who we share your data with

We may share your personal data where applicable with professional advisers such as accountants, tax advisors or other experts, third parties, credit reference agencies. This will only be allowed where the right measures are in place to protect your personal data.

There may be a time where we need to disclose information to others for legal purposes - to comply with our legal obligations.

11. How long your personal data will be kept

Your personal data will be kept even after we have finished acting for you. This is so any questions, complaints or claims which may be made can be dealt with and to show that we treated you fairly throughout the matter. We are also required to keep some records by law.

Subject to that, we have different retention periods for our files and records, depending on the nature of the matter on which you have instructed us. We will normally advise you of the retention period applicable to your matter at its completion. At the end of the retention period, we will delete your data unless they are required to resolve any outstanding issues, or are required in connection with another matter that in its own right necessitates or justifies their continued retention.

12. Failing to provide personal data

If you fail to provide Pro-law with any personal data that we need either by law or to perform our contract with you then we may not be able to perform the contract. We will notify you at the time if this means that we need to terminate our contract with you, in accordance with our Terms of Business.

13. Changes to your personal data

We are obliged to ensure that the personal data we do hold about you is up to date and accurate. Please do keep us informed if your personal data changes during our contract or if you spot any mistakes regarding your personal data. We will be happy to rectify any information that is incorrect but may retain historic data that was accurate at the time, subject to the retention policies referred to above.

14. Erasure of personal data

We need, and are entitled, to retain records of the matters on which we are instructed for a period of time after the conclusion of the matter concerned in case of later questions arising. Those periods vary

according to the nature of the matter concerned but once they have elapsed we will delete the records we hold in connection with it (unless they are required to resolve such questions, or on another matter that necessitates or justifies their retention for a further period).

15. Accessing your data (subject access request)

We are obliged to provide you with information about the personal data we hold about you if you request this at any time: this is called a subject access request.

If you wish to find out the data we are holding, then you must make a formal request to us under the Data Protection regulations. The request must be in writing to our office address addressed FAO Mr Ian Mason. There is no charge for responding to a subject access request.

If we do not hold any data about you, we will confirm this to you in writing as soon as possible. If we are holding your personal data we will aim to provide the details to you, in writing, within one month of your request.

In the latter case, we will provide you with the following: confirmation of the data is being held or processed, the categories of data we are holding or processing, verification of the lawfulness and purpose of any processing, identify anyone to whom we have disclosed your personal information or to whom it will or may be disclosed in the future.

16. Your rights under Data Protection Law

Under the Data Protection Law you have the following rights. Please note that it is possible that you will need to provide identification in order to invoke any of your following rights:

To be informed – This privacy policy must be made and available in a transparent manner on how we Pro-law process your data.

Access – You have the right to find out the details we may hold about you and the reason for doing so. It is our aim to be as open as we can be on giving you access to your person data. A formal request will have to be made in writing to pro-law. See subject access request above.

Rectification – It is our obligation to ensure we have your correct personal data at all times. You will need to provide us at the earliest opportunity any changes to your personal data. See changes to personal data above.

Erasure – You are able to request the right to be forgotten. A request should be made in writing to pro-law to advise that you wish for your personal data to be deleted. This will be on a case by case basis.

Restrict processing – Under GDPR you as an individual have the right to restrict the processing of your personal data in certain circumstances. You are able to limit the way pro-law use your data. This is alternative to requesting erasure of your data.

Portability – You have the right to obtain and reuse your personal data for your own purposes for different services. Your personal data can be moved, copied or transferred. This right only applies to information you have provided to us as a controller.

Object – This applies in certain circumstances. You have a right to object to the processing of your personal data for direct marketing purposes. You can also object if the processing is for carrying out a task in the public interest, the exercise of official authority vested in you or for your legitimate interests (or those of a third party) although these circumstances are not absolute.

Automated decision making – You have the rights to not be subject to automated processing or profiling which produces legal effects about yourself or affecting yourself.

17. Video conferencing

We frequently use a video conferencing application called Zoom for meetings with clients and others. Each meeting we hold is a new meeting using a new I.D and password each time. As the host, we do not enable screen sharing unless absolutely necessary to carry out the task. We do not record any meetings (visual or audio) unless this is considered necessary and your prior written consent is given.

You can read Zoom's privacy policy here <https://zoom.us/privacy/>

No one should feel obliged to participate in a Zoom meeting with us if they do not feel comfortable to do so: in such a case, please let us know and we will discuss what alternative arrangements may be possible.

18. Mobile Telephone Communications

We may supply to certain members of staff a mobile telephone handset for business use. Staff to whom such a handset is issued are not permitted to use it for personal communications (save in case of real emergency). Any voicemail messages/text messages received on the relevant number will be dealt with appropriately and then deleted, though records of contacts, and calls made to and received from them, will be retained in accordance with the policies set out in this document.

Staff taking and making calls will take care to ensure that conversations are held privately and confidentially.

19. Acceptance Form

Clients engaging Pro-law will be asked when confirming their instructions to us to act for them also to confirm that they have been made aware of this Policy. Any queries or concerns may be raised at any time with the director (see contact details in section 4).