

Customer Records Policy

- The organisation will comply with the Data Protection Principles of good information handling practice contained in the data Protection Act. Broadly these state that personal data must be:
 - ❖ Obtained and processed fairly and lawfully
 - ❖ Held for the lawful purposes described
 - ❖ Used for the lawful purpose only
 - ❖ Adequate, relevant and not excessive in relation to the purposes for which they are held
 - ❖ Accurate and, where necessary, kept up-to-date
 - ❖ Held no longer than is necessary for the purpose
 - ❖ Accessible to the individual concerned who, where appropriate, has the right to have information about themselves corrected or erased
 - ❖ Surrounded by proper security
- Action plans, client records and other documents containing personal data will be securely stored by the staff directly concerned with the particular project/client/service.
- Access will be limited to that member of staff and the Chief Executive. The information contained in the records will be retained either as a hard copy in a locked file in the office, or password protected on the networked IT equipment.
- Records will be checked on an annual basis during January of each year and destroyed when they are no longer necessary for the project/client/service.