

Privacy Notice

Carter Brown is committed to being transparent about how it handles personal information, to protecting the privacy and security of personal information and to meeting its data protection obligations under the General Data Protection Regulation (“GDPR”) and the Data Protection Act 2018. The purpose of this privacy notice is to make you aware of how and why we will collect and use the personal information provided to us.

If you have any questions about this privacy notice or about how we handle personal information, please contact us at referrals@carterbrownexperts.co.uk or alternatively on 01623 661089.

You also have the right to contact the Information Commission (the regulatory body who ensures that organisations process personal information fairly) about any problems you encounter.

1. Who are we?

Carter Brown – The Expert Service is a national provider of multidisciplinary assessments and bespoke training. Carter Brown operate from Suite 8, Enterprise Court, Oakham Business Park, Hamilton Way, Mansfield, Nottinghamshire.

2. How do we collect information?

Information is collected via the completion of forms i.e. make a referral form or contact us form. Our website does not use cookies.

3. What type of information is collected?

The personal information collected for the purpose of the assessment process may include:

- Identifying information i.e. names
- Contact information i.e. address and telephone number
- Geographical location
- Company name
- If a referral is being made: family history, lifestyle information and location

4. Why and how is your information used?

We will only use personal information when the law allows us to. These are known as the legal bases for processing. We will use personal information in one or more of the following circumstances:

- Where we need to do so to perform the contract or agreement we have entered
- When consent has been obtained
- To comply with a Legal obligation
- In the interest of a Public task

We use the personal information collected in order undertake the requested assessment or assignment, the information is triangulated with other information to form an evidenced based recommendation within the substantive report provided to the relevant instructing party or person.

5. How long do we hold information for?

We will retain personal data for a sufficient period to enable us to undertake any assignment work requested and for us to fulfil our legal obligations and for the establishment, exercise or defence of legal claims

6. Change of purpose

We will only use the information provided for the purposes for which we collected it. If we need to use the information for a purpose other than that for which it was collected, we will provide you, prior to that further processing, with information about the new purpose, we will explain the legal basis which allows us to process such information for the new purpose and we will provide you with any relevant further information. We may also issue a new privacy notice.

7. Who has access to your information?

Relevant employed individuals within the service have access to personal information for the purpose of processing a request. These include personnel from the following teams:

- The referrals team: this team initially allocate the assessment based on the information received to a relevant and experienced assessor.
- The case handling team: This team ensure that the information is processed securely, sent securely to the relevant assessor, deal with any specific queries throughout the assessment process and ensure the assessment is filed on time.
- The quality assurance team: Reads the assessment to ensure the report is of a quality standard, they provide feedback to the assessor regarding spelling, grammar and content.
- Management: to monitor the processing of all assessments and to ensure any issue is dealt with in line with policy and procedure.

Third Party Service Providers we work in association with: We pass your information to our third party subcontractors (assessors) for the purposes of completing the assessments. We disclose only the personal information that is necessary to deliver the service and we have a contract in place that requires them to keep your information secure and not to use it for any other purpose than the assessment. In addition to a contract, all providers are subject to rigorous checks including an enhanced DBS check, provision of professional indemnity insurance, receipt of references, evidence of qualifications and professional registrations, completion of an interview and provision of a full CV and application form.

We may also need to share personal information with a regulator or to otherwise comply with the law

We will not sell or rent your information to third parties.

We will not share your information with third parties for marketing purposes.

8. How does the Company protect your information?

We are committed to ensuring that personal information is secure.

The Company has put in place measures to protect the security of information. It has internal policies, procedures and controls in place to try and prevent your information from being accidentally lost or destroyed, altered, disclosed or used or accessed in an unauthorised way. In

addition, we limit access to information to those employees, workers, agents, contractors and other third parties in order to perform their job duties and responsibilities.

Where information is shared with external bodies (including third-party service providers), we require them to take appropriate technical and organisational security measures to protect information and to treat it subject to a duty of confidentiality and in accordance with data protection law. We only allow them to process information for specified purposes and in accordance with our written instructions and we do not allow them to use your information for their own purposes.

The Company also has in place procedures to deal with a suspected data security breach and we will notify the Information Commissioner's Office (or any other applicable supervisory authority or regulator) and the data subject of a suspected breach where we are legally required to do so.

9. Rights in connection with personal information:

Data subjects have a number of statutory rights. Subject to certain conditions, and in certain circumstances, you have the right to:

- Request access to your information - this is usually known as making a data subject access request and it enables you to receive a copy of the information we hold about you and to check that we are lawfully processing it
- Request rectification of your information - this enables you to have any inaccurate or incomplete information we hold about you corrected
- Request the erasure of your information - this enables you to ask us to delete or remove your information where there's no compelling reason for its continued processing, e.g. it is no longer necessary in relation to the purpose for which it was originally collected.
- Restrict the processing of your information - this enables you to ask us to suspend the processing of your information, e.g. if you contest its accuracy and so want us to verify its accuracy.
- Object to the processing of your information - this enables you to ask us to stop processing your information where we are relying on the legitimate interests of the business as our legal basis for processing and there is something relating to your particular situation which makes you decide to object to processing on this ground
- Data portability - this gives you the right to request the transfer of your information to another party so that you can reuse it across different services for your own purposes.

If an individual wish's to exercise any of these rights, please contact us. We may need to request specific information from the data subject in order to verify identity and check their right to access the information or to exercise any of their other rights. This is a security measure to ensure that information is not disclosed to any person who has no right to receive it.

10. Transferring your information outside the European Economic Area

The Company will not transfer information to countries outside the European Economic Area. In the event that it does, the Company will inform you in writing.

11. Automated decision making

Automated decision making occurs when an electronic system uses your information to make a decision without human intervention.

We do not envisage that any decisions will be taken ab based solely on automated decision making, including profiling. However, we will notify you in writing if this position changes.

12. Changes to this privacy notice

The Company reserves the right to update or amend this privacy notice at any time, including where the Company intends to further process your information for a purpose other than that for which the information was collected or where we intend to process new types of information. We will issue you with a new privacy notice when we make significant updates or amendments. We may also notify you about the processing of your information in other ways.