

Policy & Procedure Manual	Ref:	P/0102
Title: Privacy Policy	Revision:	2.0
Author: Rob Parsons	Date:	10/01/2020
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Document Revision History			
Revision	Date	Author	Reason for change
0.1	01/11/2018	R Parsons	First draft
1.0	05/04/2019	R Parsons	First release
2.0	10/01/2021	R Parsons	Revised policy form

BACKGROUND

Phidex Consulting Limited understands that your privacy is important to you and that you care about how your personal data is used. We respect and value the privacy of all of our clients, employees and business partners and contacts and will only collect and use personal data in ways that are described here, and in a way that is consistent with our obligations and your rights under the law.

1 Information About Us

Phidex Consulting Limited.

A limited company registered in England under company number 7512909.

Registered address: 4 The Cloisters, 12 George Road, Edgbaston, Birmingham B15 1NP.

Main trading address: 4 The Cloisters, 12 George Road, Edgbaston, Birmingham B15 1NP.

VAT number: 107115065.

Data Protection contact: Steve Chalker.

Email address: steve.chalker@phidex.com

Telephone number: 0345 307 3432.

Postal address: 4 The Cloisters, 12 George Road, Edgbaston, Birmingham B15 1NP.

2 What Does This Notice Cover?

This Privacy Information explains how we use your personal data: how it is collected, how it is held, and how it is processed. It also explains your rights under the law relating to your personal data.

3 What Is Personal Data?

Personal data is defined by the UK GDPR and the Data Protection Act 2018 (collectively, “the Data Protection Legislation”) as ‘any information relating to an identifiable person who can be directly or indirectly identified in particular by reference to an identifier’.

Personal data is, in simpler terms, any information about you that enables you to be identified. Personal data covers obvious information such as your name and contact details, but it also covers less obvious information such as identification numbers, electronic location data, and other online identifiers.

The personal data that we use is set out in Part 5, below.

4 What Are My Rights?

Under the Data Protection Legislation, you have the following rights, which we will always work to uphold:

- a) The right to be informed about our collection and use of your personal data. This Privacy Notice should tell you everything you need to know, but you can always contact

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us to find out more or to ask any questions using the details in Part 11.

- b) The right to access the personal data we hold about you. Part 10 will tell you how to do this.
- c) The right to have your personal data rectified if any of your personal data held by us is inaccurate or incomplete. Please contact us using the details in Part 11 to find out more.
- d) The right to be forgotten, i.e. the right to ask us to delete or otherwise dispose of any of your personal data that we hold. Please contact us using the details in Part 11 to find out more.
- e) The right to restrict (i.e. prevent) the processing of your personal data.
- f) The right to object to us using your personal data for a particular purpose or purposes.
- g) The right to withdraw consent. This means that, if we are relying on your consent as the legal basis for using your personal data, you are free to withdraw that consent at any time.
- h) Rights relating to automated decision-making and profiling. We do not use your personal data in this way.

For more information about our use of your personal data or exercising your rights as outlined above, please contact us using the details provided in Part 11.

It is important that your personal data is kept accurate and up-to-date. If any of the personal data we hold about you changes, please keep us informed as long as we have that data.

Further information about your rights can also be obtained from the Information Commissioner's Office or your local Citizens Advice Bureau.

If you have any cause for complaint about our use of your personal data, you have the right to lodge a complaint with the Information Commissioner's Office. We would welcome the opportunity to resolve your concerns ourselves, however, so please contact us first, using the details in Part 11.

5 What Personal Data Do You Collect and How?

We may collect and hold some or all of the personal and non-personal data set out in the table below, using the methods also set out in the table. We do not collect any 'special category' or 'sensitive' personal data.

Data Collected	How We Collect the Data
Identity Information including name, title.	Client and employee interaction.
Contact information including email address, address, phone / mobile numbers.	Client and employee interaction.
Business information including business name, job title, contract details.	Client and employee interaction.
Technical information from web site access, including the internet protocol (IP) address used	Such data is collected automatically for evaluation of web site activity and performance.

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to connect your computer to the Internet, your login information, browser type and version, time zone setting, browser plug-in types and versions, operating system and platform; information about your visit, including the full Uniform Resource Locators (URL) clickstream to, through and from our site (including date and time); products or services you viewed or searched for; page response times, download errors, length of visits to certain pages, page interaction information (such as scrolling, clicks, and mouse-overs), and methods used to browse away from the page and any phone number used to call our customer service number.	
Payment information including business bank account details.	Client and employee interaction.
Content of business communications.	Via emails, written correspondence (which may be scanned) and phone calls.
Energy industry data and billing data including clients' customer supply point information, consumption and invoice content.	From our clients and energy industry sources.

6 How Do You Use My Personal Data?

Under the Data Protection Legislation, we must always have a lawful basis for using personal data. The following table describes how we may use your personal data, and our lawful basis for doing so:

What We Do	What Data We Use	Our Lawful Basis
Administering our business.	Employee data / Client information.	Consent / Contract / Legitimate interests – we use the data to hire our staff, and to administer all aspects of their employment with the Company as well as other matters.
Supplying our products and services to our Clients.	Industry data flows / Client energy billing data / Client information.	Contract / Legitimate interests – we use the data to deliver our services and products to our Clients under the contracts we have with them.
Developing, supporting and improving our products and services.	Industry data flows / Client energy billing data / Client information / Technical data	Contract / Legitimate interests – we use the data to assist our Clients to better serve their

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	from web site access / Business communications.	customers, and as part of our efforts to keep our web site safe and secure
Facilitating payments for our products and services.	Client information.	Contract / Legitimate / Public tasks – we use the data to enable us to invoice our Clients and to collect their payments. and to enable us to fulfil our duties to pay tax and VAT.
Personalising and tailoring our products services for our Clients.	Technical data from web site access / Business communications.	Legitimate interests – we use the data to better understand what is of interest to our Clients, and what further products or services would be of value to them. We also use to administer our web site and for internal operations, including troubleshooting, data analysis, testing, research, statistical and survey purposes, to improve our site to ensure that content is presented in the most effective manner for you and for your computer.
Communicating with and supplying information to Clients by email, phone and post.	Client information / Business communications.	Legitimate interests – we use the data to ensure that we are able to communicate with our Clients both for supporting delivery under contracts and for marketing to existing Clients and future prospects.
Training staff, resolving disputes and ensuring regulatory compliance.	Phone recordings / Emails	Legitimate interests – we use the data to enable us to train our staff, to investigate any disputes and to ensure that we always comply with regulation. To help to prevent and detect fraud or loss.

With your permission and/or where permitted by law, we may also use your personal data for marketing purposes, which may include contacting you by email telephone and/or text message and/or post with information, news, and offers on our and/or services. You will not be sent any unlawful marketing or spam. We will always work to fully protect your rights and comply with our obligations under the Data Protection Legislation and the Privacy and Electronic Communications (EC Directive) Regulations 2003, and you will always have the opportunity to opt-out.

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We will only use your personal data for the purpose(s) for which it was originally collected unless we reasonably believe that another purpose is compatible with that or those original purpose(s) and need to use your personal data for that purpose. If we do use your personal data in this way and you wish us to explain how the new purpose is compatible with the original, please contact us using the details in Part 11.

If we need to use your personal data for a purpose that is unrelated to, or incompatible with, the purpose(s) for which it was originally collected, we will inform you and explain the legal basis which allows us to do so.

In some circumstances, where permitted or required by law, we may process your personal data without your knowledge or consent. This will only be done within the bounds of the Data Protection Legislation and your legal rights.

7 How Long Will You Keep My Personal Data?

We will not keep your personal data for any longer than is necessary in light of the reason(s) for which it was first collected. We are legally required to hold some types of information to fulfil our statutory obligations. We will hold your personal information on our systems for as long as is necessary for the relevant activity, or as long as is set out in any relevant contract you hold with us. Your personal data will therefore be kept for the following periods (or, where there is no fixed period, the following factors will be used to determine how long it is kept):

Type of Data	How Long We Keep It
Client contact information including name, title, email address, business address, telephone / mobile numbers	Indefinitely unless requested otherwise
Client and supplier contract and invoice information	Indefinitely and at minimum for the statutory period required
Emails	Indefinitely unless requested otherwise
Telephone recordings	Six months
Industry data flows including data on Clients' customer energy supplies	Duration of Client relationship
Client energy billing data including data on consumers' supplies	Duration of Client relationship
Technical information from interaction with our web site including IP address, browser type, and other information related to the site visit	For as long as the information is relevant in assisting us to understand how to improve accessibility to the information we wish to share, enhance visitor experience and ensure security of our web site

8 How and Where Do You Store or Transfer My Personal Data?

We will only store your personal data within the UK or, in the case of certain Microsoft

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application data, the European Economic Area (the “EEA”). The EEA consists of all EU member states, plus Norway, Iceland, and Liechtenstein. This means that your personal data will be fully protected under the EU GDPR and/or to equivalent standards by law. Transfers of personal data to the EEA from the UK are permitted without additional safeguards.

The security of your personal data is essential to us, and to protect your data, we take a number of important measures, including the following:

- limiting access to your personal data to those employees, agents, contractors, and other third parties with a legitimate need to know and ensuring that they are subject to duties of confidentiality;
- procedures for dealing with data breaches (the accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to, your personal data) including notifying you and/or the Information Commissioner’s Office where we are legally required to do so;

9 Do You Share My Personal Data?

We may share your information with selected third parties, including business partners, suppliers and sub-contractors, for the supply of products / services to you and the performance of any contract we enter into with you. If any of your personal data is shared with a third party for this purpose, we will take steps to ensure that your personal data is handled safely, securely, and in accordance with your rights, our obligations, and the third party’s obligations under the law, as described above in Part 8.

We will not otherwise share any of your personal data with any third parties for any purposes, subject to the following exceptions.

- If we sell, transfer, or merge parts of our business or assets, your personal data may be transferred to a third party. Any new owner of our business may continue to use your personal data in the same way(s) that we have used it, as specified in this Privacy Policy.
- In some limited circumstances, we may be legally required to share certain personal data, which might include yours, if we are involved in legal proceedings or complying with legal obligations, a court order, or the instructions of a government authority.

10 How Can I Access My Personal Data?

If you want to know what personal data we have about you, you can ask us for details of that personal data and for a copy of it (where any such personal data is held). This is known as a “subject access request”.

All subject access requests should be made in writing and sent to the email or postal addresses shown in Part 11.

There is not normally any charge for a subject access request. If your request is ‘manifestly unfounded or excessive’ (for example, if you make repetitive requests) a fee may be charged to cover our administrative costs in responding.

We will respond to your subject access request within ten days and, in any case, not more than one month of receiving it. Normally, we aim to provide a complete response, including a copy of your personal data within that time. In some cases, however, particularly if your request is more complex, more time may be required up to a maximum of three months from the date we receive your request. You will be kept fully informed of our progress.

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11 How Do I Contact You?

To contact us about anything to do with your personal data and data protection, including to make a subject access request, please use the following details (for the attention of Steve Chalker, Finance Director):

Email address: **steve.chalker@phidex.com**

Telephone number: **0345 307 3432**

Postal Address: **4 The Cloisters, 12 George Road, Edgbaston, Birmingham B15 1NP**

12 Changes to this Privacy Notice

We may change this Privacy Notice from time to time. This may be necessary, for example, if the law changes, or if we change our business in a way that affects personal data protection.

Any changes will be made available on our web site at www.phidex.com. This Privacy Notice was last updated on 10.01.2021.