

GDPR Compliance Handout 1



Gaining Client Consent for Treatment, Information and Marketing Info

New data protection legislation comes into force on 25th May 2018. The General Data Protection Regulations (GDPR) affect all businesses across the EU and there is mandatory compliance. For further background information see the Teleos RSS feed of 7th February 2018.

The new Teleos program build incorporates 'explicit consent' features which will provide clients an opportunity to choose what type of communications they receive from you. You can no longer assume consent and, to be fully compliant in this area of GDPR, you will need to get the client to complete and sign a consent form.

NB It should be noted that, although there is a tick box for 'treatment' reminders, you don't actually need to obtain consent as you have a duty of care to the client's animals. This would be classed as a 'Legitimate Interest'.

This handout should serve as a guide and you should consult your own Data Protection Officer (DPO) as to its implementation in your practice.

GDPR features on the client card

A new GDPR section has been added to the top right corner of client cards in the Teleos program. This gives details of the current GDPR status of the client and what the client has authorised. The client can choose to receive 'Reminders', 'Information' and 'Marketing' SMS texts and/or emails. We have not included post as you can simply address anything to the animal – as it has no status under GDPR. As stated above, postal treatment reminders are allowable as you have a 'Legitimate Interest'.

The GDPR status will appear as '**Not verified**', if the practice has not checked the client's contact details in the past 12 months. The time allowed before the verified status lapses is configurable.

The screenshot shows a client card interface with the following fields and sections:

- Contact Details:**
 - Mr [] First name / Initials [T]
 - Support: 0121 286 9990
 - Fax: 0871 253 1993
 - Mobile: 07700 900149
 - Email address: T.Teleos@teleosvet.com
- GDPR Status (highlighted in red):**
 - GDPR status: Not verified
 - Last checked: 30.01.2018
 - Reminders: SMS, Email
 - Information: SMS, Email
 - Marketing: SMS, Email
- Financials:**
 - Curr. bal. 764.58
- Animal details / History details:**
 - Ngles: [] Comms: []
 - Title: [] Initials: []
 - Postcode: [] Relation: []

Tick Boxes

There are three pairs of tick boxes beneath the GDPR button. They record whether the client has authorised 'Reminders', 'Information' or 'Marketing' communications SMS and/or emails.

The screenshot shows a client record form with the following fields and sections:

- Header:** A blue bar with the text "Tick Boxes".
- Client Details:** Fields for "Mr" (dropdown), "First name / Initials" (text: "T"), "Support" (text: "0121 286 9990"), "Fax" (text: "0871 253 1993"), "Mobile" (text: "07700 900149"), and "Email address" (text: "T.Teleos@teleosvet.com").
- GDPR Status:** A red box labeled "GDPR status: Not verified".
- Last checked:** A text field showing "30.01.2018".
- Communication Preferences:** Three columns of tick boxes: "Reminders", "Information", and "Marketing". Each column has "SMS" and "Email" options, all of which are currently unchecked.
- Financials:** A "Curr. bal." field showing "764.58".
- Navigation:** Tabs for "Animal details" and "History details".
- Form Fields:** Fields for "Title", "Initials", "Postcode", and "Relation".

Until the client's details have been verified, they are shown as 'Not verified'. You will note that the previous setting of the tick box alongside the clients Mobile and E-mail addresses has been carried forward as 'Reminders'. 'Information' and 'Marketing' will be initially un-ticked by default.

GDPR status button

Clicking the GDPR status button will give you the following options:-

'Print'- This prints a form with the current details of the client for them to check and provide authorisation for 'Treatment', 'Information and/or 'Marketing' communications. A template form is shown at the end of this document. These can be produced on A5 or A4 paper and the wording can be customised so that you can add any 3rd party data processors that your practice uses.

'Verify + Import'- You can tick the appropriate boxes, change the client status to 'Verified' and easily attach a pdf copy or image of the signed document to the client record. You will need to scan or photograph the completed form.

'Verify' - An alternative to 'Verify + Import' - a way of marking the card to say the GDPR document has been completed and filed securely, if the practice chooses not to attach images of the GDPR document to the client record. It is a requirement of GDPR that such documents are securely stored in a locked filing cabinet.

'View' - to view any image or PDF file of the signed document attached to the client record on screen.

<PRACTICE NAME>

Under the new General Data Protection Regulations (GDPR) we are required to gain your specific consent in order to send you treatment reminders, information and marketing information. We are also under a duty to ensure that the information that we hold on our systems about you is correct. Please take a few minutes to review the information below which we hold on our practice management computer system. If any amendments are needed, we are required to seek proof of ID. Thank you in advance for your cooperation.

Primary Contact Details

Title: <TITLE> **First Name or Initials:** <First name or initials>
Last Name: <SURNAME>
Address: <House number> <Address 1>, <Address 2>, <Address 3>, <Address 4> <POSTCODE>

Contact Numbers

Home: <Phone home>
Work: <Phone work>
Mobile: <Phone mobile>
Email: <Email address>

<ADDITIONAL CONTACT NUMBERS>

I hereby grant <PRACTICE NAME> authorisation to process my personal data for the purpose of providing Veterinary Care for my animals. It may be necessary, from time to time, to provide access to this data to our software provider, Teleos Systems Limited, where support issues may arise. I understand that my data will only be used for the specific purpose of sending the communications authorised below and for no other purpose without obtaining my specific consent for that purpose.

Please select if you would like to receive SMS and/or Email Communications by ticking the boxes below:-

- | | | |
|---|--|--|
| <input type="checkbox"/> SMS - Treatment Reminders | <input type="checkbox"/> SMS - Information | <input type="checkbox"/> SMS - Marketing |
| <input type="checkbox"/> E-Mail - Treatment Reminders | <input type="checkbox"/> Email – Information | <input type="checkbox"/> Email - Marketing |

Second Client Contact Details (only complete if required)

Title: <TITLE 2> **First Name or Initials:** <First name or initials 2>
Last Name: <SURNAME 2>
Address: <Other Housenumber> <Other Address 1>, <Other Address 2>, <Other Address 3>, <Other Address 4>
<Other POSTCODE>

- Send bills to this address instead? Send postal recalls to this address instead?

I understand that none of my personal data will be supplied to any other 3rd party processor without my specific consent. I understand that I am able to withdraw my consent at any time by completing a withdrawal form available from reception.

Signed _____ Date _____
(Must be over 16 or by Parent/Guardian if under 16 years old)