

Schedule 8

Data about partners and staff of the firm, consultants, secondees (including referendars), those on work experience, temporary staff, former partners and staff, next of kin, spouses, beneficiaries

	What we collect	Source	Purpose	Legal basis	Recipients
Contact information (work)	Name	Individual himself or herself	For contacting individuals where we need to do so in the individual's capacity as employee or member (partner)	Our legitimate interest in processing such information in the course of their employment or their role as a member (partner) of the firm	Our clients
	Work address	Recruitment agency			Other professional advisers of our clients
	Landline/mobile phone or fax numbers				Other parties and/or their professional advisers involved in matters where required as part of the conduct of matters
	Email addresses		Security and prevention of crime		Government bodies (such as HMRC) Courts, tribunals, local authorities, the Land Registry, where required as part of the conduct of matters
					UK regulatory and law enforcement bodies, where required of us under UK law or regulation (for example the SRA)
					Compilers of legal directories (where the individual has been involved in a matter that is submitted
					Our service providers (such as data storage, typing, administrative support and audit)
Contact information	Home address	Individual himself or herself	In order to keep appropriate employment records	Our legitimate interest in processing	UK regulatory and law enforcement bodies, where

	What we collect	Source	Purpose	Legal basis	Recipients
(personal) and other personal information	Landline/mobile phone numbers	Health professionals (for health data)	For contacting individuals where we need to do so in the individual's capacity as employee or member (partner)	such information in the course of their employment or their role as a member (partner) of the firm	required of us under UK law or regulation (for example the SRA)
	Email addresses	BUPA			
	Previous addresses				
	Emergency contact details		For obtaining/verifying evidence of identity and carrying out background checks	Compliance with a legal obligation	Our service providers (such as data storage, typing, administrative support and audit)
	Date of birth				
	Marital status				
	Next of kin, spouse, beneficiaries' names and contact details		In order to allow the individual to receive pension and other benefits	Schedule 1, Part 1(1)(1)(a) of the Data Protection Act 2018	Health data may be provided to medical professionals and to insurance brokers for the purpose of sourcing health insurance
	Adoption and birth certificate details		For contacting next of kin, spouses and beneficiaries if the circumstances require (including notifying such persons of their entitlements to benefits as a result of the death or incapacity of the individual)	Schedule 1, Part 2(8)(1)(b) of the Data Protection Act 2018	Government bodies (such as HMRC)
	Health data of individual				
	Health data of spouse and/or children when added to firm's private healthcare scheme				
	Sickness records and details				
	Occupational health reports – and pre-employment screening		Access to medical reports for employment purposes (including to manage performance)		
	Dietary information		Security and prevention of crime		
	Ethnicity data		For catering purposes		
Employment information:	Position/Title	Individual himself or herself	In order to keep appropriate employment records	Our legitimate interest in processing such information in the course of their employment or their	Our clients
	Employment history and CV				
	References from previous employers	Recruitment agency Previous employers	For assessing their continued suitability for their role		Other professional advisers of our clients Other parties and/or their professional advisers involved

	What we collect	Source	Purpose	Legal basis	Recipients
	Professional specialisms Education, qualifications and qualification certificates Disciplinary records Performance records Appraisals Grievances Performance feedback Interview notes Languages spoken Practicing certificate details and caveats Practicing certificate status Professional indemnity information Various test scores as appropriate – MOT, 16pf, Watson Glazer, professional qualifications Working patterns (days worked and non-work days)	SRA/Law Society External testing/assessment body	For planning progression For compliance with SRA professional qualification requirements For carrying out background checks	role as a member (partner) of the firm Compliance with our legal obligations	in matters where required as part of the conduct of matters Compilers of legal directories (where the individual has been involved in a matter that is submitted) Our service providers (such as data storage, typing, administrative support and audit)
Financial information	Bank details Transaction history Salary and benefits Life insurance Statement of wishes – death in service	Individual himself or herself	To pay or compensate the individual In order to keep appropriate employment records In order to allow the individual to receive pension and other benefits	Our legitimate interest in processing such information in the course of their employment or their role as a member (partner) of the firm	Our bank Our accountants/auditors Third party payroll processors Government bodies (such as HMRC) Third party providers of benefits (such as childcare)

	What we collect	Source	Purpose	Legal basis	Recipients
	Pension Tax-related information National Insurance number Payroll documentation - P45 / P60 / P11D		In order to allow nominated family members or beneficiaries to receive benefits or insurance funds	The individual's legitimate interest in being paid as an employee or compensated for being a member (partner) of the firm Consent	vouchers, life insurers, pension providers)
ID document information	Information contained in or provided to us as part of our recruitment or take on process. This includes details included in copy personal photo and residential ID documents we receive Visa documentation (right to work in the UK)	Individual himself or herself	For obtaining/verifying evidence of identity In order to keep appropriate employment records In order to confirm that the individual is entitled to work in the UK Security and prevention of crime	Our legitimate interest in processing such information in the course of their employment or their role as a member (partner) of the firm Compliance with a legal obligation	Our bank Government bodies (such as HMRC) UK regulatory and law enforcement bodies, where required of us under UK law or regulation (for example the SRA) Our service providers (such as data storage, typing, administrative support and audit)
Results of criminal, adverse media and financial checks	[Guidance, based on public sources, whether the individual has a media, criminal or financial history that could pose an adverse risk]	Our provider (currently VERO) will obtain this information from public databases.	The purpose of the screening is to identify any risks a person's background may pose to the business of the firm and/or its clients, and are required by law and our regulators.	Background checks required to comply with a legal obligation.	Our service providers for these checks. UK regulatory and law enforcement bodies, where required of us under UK law or regulation

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Equipment and information data	Images via CCTV, including work areas	Individual himself or herself	Security and prevention of crime	Our legitimate interest in maintaining a safe environment and in preventing and detecting crime	Any data which reveals criminal activity may be passed to law enforcement authorities
	Entrance/exit dates/times	Our CCTV and door access control system	To ensure the individual is performing their employment contract		
	Movement within the building via security card system				
	Computer usage data	IT usage monitoring systems		Our legitimate interest in processing such information in the course of their employment or their role as a member (partner) of the firm	Our service providers (such as data storage, typing, administrative support and audit)
	Telephone usage data				