

Schedule 8

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

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Professional specialisms	SRA/Law Society	For planning progression	role as a member (partner) of the firm	in matters where required as part of the conduct of matters
Education, qualifications and qualification certificates	External testing/assessment body	For compliance with SRA professional qualification requirements	Compliance with our legal obligations	Compilers of legal directories (where the individual has been involved in a matter that is submitted)
Disciplinary records				
Performance records		For carrying out background checks		
Appraisals				Our service providers (such as data storage, typing, administrative support and audit)
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)				
Financial information	Bank details	Individual himself or herself	To pay or compensate the individual	Our bank
	Transaction history		In order to keep appropriate employment records	Our accountants/auditors
	Salary and benefits			Third party payroll processors
	Life insurance		In order to allow the individual to receive pension and other benefits	Government bodies (such as HMRC)
	Statement of wishes – death in service			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

	What we collect	Source	Purpose	Legal basis	Recipients
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				Our service providers (such as data storage, typing, administrative support and audit)
	Computer usage data	IT usage monitoring systems			
	Telephone usage data				