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Privacy Policy Statement for Julie SLT Ltd

When you use Julie SLT Ltd you trust us with your information. This privacy policy is meant to help you understand what data we collect, why we collect it, and what we do with it. We have tried to make it as simple as possible but if you have any questions please contact us.

Julie O'Connor assumes the function of data controller and supervises the compliance with General Data Protection Regulation (GDPR) within the business.

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1 Information we collect

Julie SLT Ltd holds personal data as part of conducting a professional service. The data follows under the following headings: healthcare records, educational records, clinical records, general administrative records, and financial records.

1.1 Healthcare records

A healthcare record refers to all information collected, processed and held both in manual and electronic formats pertaining to the service user and their care. Speech and language problems can be complex, and a wide range of information may be collected in order to best meet the needs of the client, and to maintain a high quality service which meets best practice requirements. In order to provide a high quality service, a range of information may be collected.

Examples of data collected and held on all current and active clients include the following:

- Contact details: Name, address, phone numbers, e-mail address
- Personal details: date of birth

- Other contacts: name and contact details of GP and any other relevant healthcare professionals involved.

For child services:

- Parent/guardian details
- Description of family
- Educational placements.
- Pre- and post-natal history: This can include information relating to mother's pregnancy, and child's birth.
- Developmental data: developmental milestones, feeding history, audiology history.
- Medical details: such as any relevant illnesses, medications, and relevant family history. Reports from other relevant allied health professionals such as: Audiology, Psychology, CAMHS (Child & Adolescent Mental Health Services), Occupational therapy, Physiotherapy, Ophthalmology.

1.2 Educational records

Relevant Individual Educational Plans (IEPs), progress notes from educational staff and school reports may be held.

1.3 Clinical records

Specific data in relation to communication skills may be collected and held, such as assessment forms, reports, case notes, e-mails, text messages and transcripts of phone. Audio and video files may also be collected and stored.

1.4 General administrative records

Julie SLT Ltd may hold information regarding attendance reports and accident report forms.

1.5 Financial records

A financial record pertains to all financial information concerning the practice, e.g. invoices, receipts, information for HMRC. Julie SLT Ltd may hold data in relation to: bank details, receipts and invoices. Information will include name of bill payer, client initials, address and record of invoices and payments made.

2 Where we get our information

Personal data will be provided by the client, or in the case of a child (under 16 years), their parent(s)/guardian(s). This information will be collected as part of a case history form prior to, or on the date of first contact.

Information may also be provided directly from relevant third parties such as schools, medical professionals and allied health professionals, with prior consent from the parent(s)/guardian(s).

3 How we use the information that we collect

We use the information we collect to provide assessment and therapy as per the relevant professional guidelines, as well as to maintain the general running of the business, such as running our booking system, keeping our accounts and updating you of any changes in policies or fees.

Information may also be used for research purposes, with the written consent of the client or parent/guardian.

3.1 Data retention periods

The retention periods are the suggested time periods for which the records should be held based on the organisation's needs, legal and/or fiscal precedence or historical purposes. Following the retention deadline, all data will be destroyed under confidential means.

3.2 Client Records

3.2.1 Clinical Records

Julie SLT Ltd keeps both physical and electronic records of clinical data in order to provide a service.

- The preferred format for clinical data is paper and electronic
- Clinical data is deleted/confidentially destroyed within 3 months after the child's 25th birthday to fulfil legal and professional obligations for the defence of a possible civil claim
- Video records/ voice recordings relating to client care/videoconferencing records may be recorded with consent, analysed and then destroyed. If written consent is provided to use recordings for training purposes, the client will have the option to withdraw consent at any time.

3.2.2 Financial Records

Julie SLT Ltd keeps electronic/paper records of financial data from those who use our services.

- Financial Data is kept for 6 years to adhere to HMRC guidelines.
- Financial Data (including non-payment of bills) can be given to HMRC at HMRC's request.

3.2.3 Contact Data

Contact Data is kept for 6 years to allow processing of Financial Data if required. (This may be retained for longer for safety, legal request, or child protection reasons.)

3.3 Exceptions

If under investigation or if litigation is likely, files must be held in original form indefinitely, otherwise files are held for the minimum periods set out above.

4 Information we share

We do not share personal information with companies, organisations and individuals outside Julie SLT Ltd unless one of the following circumstances apply:

4.1 With your consent:

We will only share your Personal Identifying Information (PII) to third parties when we have express written permission by letter or email to do so. I require opt-in consent for the sharing of any sensitive information.

Third parties may include: hospitals, GPs, other allied health professionals, educational facilities.

4.2 For legal reasons:

We will share personal information with companies or organisations outside of Julie SLT Ltd if disclosure of the information is reasonably necessary to:

- Meet any applicable law, regulation, legal process or enforceable governmental request.
- Meet the requirements of the Children First Act 2015.
- To protect against harm to the rights, property or safety of Julie SLT Ltd, our service users or the public as required or permitted by law.

4.3 To meet financial requirements:

Julie SLT Ltd also is required to share Financial data with Quick File Ltd in order to comply with local tax laws. Julie SLT Ltd has obtained a copy of Quick File Ltd's own Data protection policy.

4.4 For processing by third parties/external processing

The following third parties are engaged for processing data:

Who	Type of data	Purpose
Quick File Ltd	Financial	Processing financial accounts

5 Use of Artificial Intelligence

5.1. Our Approach to AI

We use AI tools to enhance services while maintaining privacy and professional care. All AI use is overseen by our qualified therapist, and no AI tool makes clinical decisions.

5.2. Examples of AI Tools We Use

- ChatGPT, Gemini, Claude, Perplexity, Copilot, LMNotebook, Zoom AI tools
- Heidi (AI medical scribe for note-taking)

5.3. How We Use AI

Resource Creation:

- Initial therapy material drafts
- Visual support and worksheet creation
- Story-based activity development
- Therapist review and customisation

Administrative Support:

- Document formatting
- Standard communication drafts
- Schedule organisation
- Document readability improvement

Research and Planning:

- Therapy approach exploration
- Evidence-based practice research
- Therapy idea generation
- Clinical decisions by qualified therapist only

AI-Assisted Note-Taking

Routine post-session dictation

After most sessions the therapist may dictate a short summary into Heidi – an AI medical scribe provided by Heidi Health Pty Ltd. Heidi converts the dictation to text and immediately deletes the audio once the transcript is produced. No part of your child's voice is captured in this routine workflow, and the resulting note becomes part of your child's therapy record in WriteUpp.

Purpose – to improve the accuracy and efficiency of record-keeping.

Optional live transcription for comprehensive notes

With your explicit consent, some sessions may be recorded using Heidi's ambient mode to transcribe the session in real time. This is particularly helpful for detailed assessments or complex sessions where capturing all information is important. Heidi records the conversation, converts it to text, and deletes the audio straight away. The transcript becomes part of your child's record within WriteUpp. Purpose of live transcription – to ensure comprehensive and accurate documentation of your child's assessment or therapy sessions.

Storage & Retention

AI-generated text from post-session dictation and live transcription is imported into WriteUpp and retained in line with our policy (until your child is 25 years old). Live transcription audio is deleted from Heidi immediately after processing.

Accuracy Assurance

AI-generated transcripts may contain occasional transcription errors. The SLT will always thoroughly check the transcript and make alterations to ensure it is an accurate reflection of the session before finalising the note in your child's electronic health record.

Your Choice

Live transcription will only be used if you provide explicit consent. You can refuse or withdraw consent to live transcription at any time; therapy will continue without it.

5.4. AI Data Protection Measures

No Personal Information Entry (for general AI tools):

- No names, addresses, or identifying details
- No unique identifying characteristics

Data Anonymisation (for general AI tools):

- Removal of identifying information
- Content checking for identifying information

Content Review:

- Therapist review of AI-generated content
- Individual needs customisation
- Quality and accuracy verification

Heidi-Specific Protections:

- Audio deleted immediately after transcription
- Data hosted on UK/EEA servers
- No routine transfers outside UK/EEA
- Processing under UK-approved Standard Contractual Clauses if overseas technical support needed

Your AI Rights

You can:

- Opt out of AI-supported service aspects
- Request AI use information
- Ask questions about AI use
- Raise concerns about AI-generated content

- Withdraw consent for live transcription at any time

5.5. Our Lawful Basis for AI Processing

We rely on:

- Legitimate interests (efficient record-keeping) for post-session dictation
- Your explicit consent for any live recording or transcription
- Legal obligation under HCPC Standards to keep full, clear and accurate records

International Transfers and Third-Party Processors

Both WriteUpp and Heidi host and process all data for UK users on secure servers located within the United Kingdom and the European Economic Area (EU/EEA). In the unlikely event that overseas personnel from either service require temporary, read-only access for technical support, such access is provided under UK-approved Standard Contractual Clauses and appropriate data protection safeguards.

6 How and when we obtain consent

Prior to initial assessment or consultation, a copy of the data protection policy will be provided to clients along with a client contract. A consent form will need to be signed by the client prior to commencing the service.

Should a client wish to withdraw their consent for data to be processed, they can do so by contacting Julie SLT Ltd.

7 How we protect your data

In accordance with the General Data Protection Regulation (GDPR), we will endeavour to protect your personal data in a number of ways:

7.1 By limiting the data that we collect in the first instance

All data collected by us will be collected solely for the purposes set out at 1 above and will be collected for specified, explicit and legal purposes. The data will not be processed any further in a manner that is incompatible with those purposes save in the special circumstances referred to in section 5.1. Furthermore, all data collected by us will be adequate, relevant and limited to what is necessary in relation to the purposes for which it is collected which include, *inter alia*, the assessment, diagnosis and treatment of speech, language and communication disorders.

7.2 By transmitting the data in certain specified circumstances only

Data will only be share and transmitted, be it on paper or electronically, only as is required, and as set out in section 3.

7.3 By keeping only the data that is required

when it is required and by limiting its accessibility to any other third parties.

7.4 By disposing of/destroying the data once the individual has ceased receiving treatment

within *3 months of the child's 25th birthday* of the completion of this treatment apart from the special categories of personal data as set out at 1.1 above. Where data is required to be held by us for longer, we will put in place appropriate technical and organisational measures to ensure a level of security appropriate to the risk. These may include measures such as the encryption of electronic devices, pseudonymisation of personal data, and/or safe and secure storage facilities for paper/electronic records.

7.5 By retaining the data for only as long as is required

which in this case is *up to the child's 25th birthday* except for circumstances in which retention of data is required in circumstances set out at part 1.1 above or in certain specific circumstances as set out at Article 23(1) of the GDPR.

7.6 By destroying the data securely and confidentially after the period of retention has elapsed.

This could include the use of confidential shredding facilities or, if requested by the individual, the return of personal records to the individual.

7.7 By ensuring that any personal data collected and retained is both accurate and up-to-date.

8 Protecting your Rights to Data

8.1 Adult clients

Adults have the right to request data held on them as per article 15 of GDPR. A request must be made in writing. Further information regarding accessing your personal data are available in the

document 'Rights of Individuals under the General Data Protection Regulation', downloadable from: www.gdprandyou.ie

8.2 Children

For children under the age of 16, data access requests are made by their guardians. When a child turns 16, then they may make a request for their personal data. However, this is subject to adherence with the Children First Act.

9 Security

Julie SLT Ltd, as with most providers of healthcare services is aware of the need for privacy. As such, we aim to practice privacy by design as a default approach, and only obtain and retain the information needed to provide you with the best possible service.

All persons working in, and with Julie SLT Ltd in a professional capacity are briefed on the proper management, storage and safekeeping of data.

All data used by Julie SLT Ltd, including personal data may be retained in any of the following formats:

1. Electronic Data
2. Physical Files

The type of format for storing the data is decided based on the format the data exists in.

Where applicable, Julie SLT Ltd may convert physical files to electronic records to allow us to provide a better service to clients.

9.1 Data Security

Julie SLT Ltd understands that the personal data used in order to provide a service belongs to the individuals involved. The following outlines the steps which Julie SLT Ltd use to ensure that the data is kept safe.

9.1.1 Electronic Data

All electronic data is contained in the following systems:

- Personal password-protected laptop belonging to the data controller of Julie SLT Ltd:*
 - This system is physically located in the UK at Surbiton, KT5 9EE.

- This system provider is aware of their requirements for GDPR compliance.
- This system has a Live Update for security enabled.
- All persons working in Julie SLT Ltd have read/write/delete access to records.
- All persons require a Log on and Password in order to access the records.
- The data controller in Julie SLT Ltd can remove or delete users.
- The data controller in Julie SLT Ltd cannot change users passwords.

WriteUpp

- This system is physically located in UK.
- This system provider is aware of their requirements for GDPR compliance.
- The system has an external administrator / Database owner to Julie SLT Ltd. The External administrator does not have access to client records
- This system has a Live Update for security enabled.
- Julie O'Connor has *READ/WRITE/ DELETE* access to records.
- All persons require a Log on and Password in order to access the records.
- The data controller in Julie SLT Ltd can remove or delete users.

Gmail.com:

- This system provider is aware of their requirements for GDPR compliance.
- The system has an external administrator / Database owner to Julie SLT Ltd. The External administrator does not have access to client records except those that are disclosed in email
- This system *has* a Live Update for security enabled.
- All persons require a Log on and Password in order to access the records.
- A copy of the files *are* made on the data controller's computer when in use and then deleted from the system.
- Julie SLT Ltd makes every effort to not disclose identifiable personal information via email and all documents sent via email are password protected. Emails concerning the client are saved into electronic records and then deleted from Gmail when the client is discharged.

Quick File Ltd (Quickfile.co.uk)

- This system is physically located in UK.
- This system provider is aware of their requirements for GDPR compliance.
- The system has an external administrator / Database owner to Julie SLT Ltd. The External administrator does not have access to client records
- This system has a Live Update for security enabled.
- Julie O'Connor has *READ/WRITE/ DELETE* access to records.
- All persons require a Log on and Password in order to access the records.
- A copy of invoices are made on the users' computer at times.
- The data controller in Julie SLT Ltd can remove or delete users.
- The data controller in Julie SLT Ltd cannot change users passwords.

9.1.2 Physical Files

All physical data is located in:

- Surbiton, UK
- This system is physically located at *Surbiton, KT5 9EE*

- Only the following persons working in Julie SLT Ltd have access to these records: Julie O'Connor.
- These records are kept in a container secured with a lock and key.

9.2 Security Policy

- 9.2.1 Julie SLT Ltd understands that requirements for electronic and physical storage may change with time and the state of the art. As such, the data controller in Julie SLT Ltd reviews the electronic and physical storage options available to Julie SLT Ltd every *12 months*.
- 9.2.2 All physical devices used by persons working in Julie SLT Ltd which may contain any identifiable PII are not enabled with loss theft tracking and remote wipe abilities.
- 9.2.3 All persons working in Julie SLT Ltd are aware and briefed on and refresh the requirements for good data hygiene every *12 months*. This briefing compliance is monitored by the data controller and includes, but is not limited to:
- Awareness of client conversations in unsecure locations.
 - Enabling auto-lock on devices when leaving them unattended, even within Julie SLT Ltd locations.
 - Use of non-identifiable note taking options. (initials, not names).
 - The awareness of Julie SLT Ltd procedure should a possible data breach occur, either through malicious (theft) or accident (loss) of devices or physical files.

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