



Harlequin Software – Policy on Use and Access

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South Central Ambulance Charity – Policy on the Use and Access to Harlequin Software

1. Introduction & Purpose

South Central Ambulance Charity and the Community Engagement and Training Department of South Central Ambulance Service NHS Foundation Trust use the Harlequin CRM database to record information about Charity donors and supporters and volunteers who support our work including all Community First Responders. There is a data sharing agreement in place between the two organisations and this is therefore a combined policy covering all aspects of data retention associated with the Harlequin database.

South Central Ambulance Charity is a member of the Institute of Fundraising (IoF) and is committed to following the Fundraising Regulator Code of Practice. In the maintenance and recording of data we follow the guidelines issued by the Information Commissioners Office (ICO).

The purpose of this policy is to identify how the Harlequin system is used, for what purpose and to define the individual access. The policy defines the principles and responsibilities for South Central Ambulance Charity's use of the Harlequin software to record personal data for supporters and volunteers.

2. About Harlequin CRM Software

Harlequin Software is a specialist CRM database software provider used exclusively within the Charity sector and widely across NHS Charities. It is an independent company based in the UK which was formed in 1986.

3. Why We use a Bespoke System

- 3.1 South Central Ambulance Charity and South Central Ambulance Service NHS Foundation Trust (SCAS) believes that donors, supporters and volunteers have the right to decide when and how their personal information is recorded and retained.
- 3.2 In the case of Community First Responders (CFR) it is necessary for SCAS to maintain a record of their personal information, training and responding activity and compliance in order to continue deploying them as a CFR.
- 3.3 We do not record any sensitive information on the Harlequin database restricting the information recorded to what is absolutely necessary. In the case of Charity donors, supporters and volunteers this is covered by subject's personal data of name, address, phone and email. Information is recorded on each individual's record for personal donations made to the Charity, communications sent out from the Charity and communication received in from the data subject.
- 3.4 In the case of Community First Responder volunteers information is recorded on their training record, due diligence checks by SCAS including a DBS check and their driving license information. This is essential information necessary in order to confirm that an individual is a fit and proper person to act as a Community First Responder.
- 3.5 We seek and record consent for all data subjects that are recorded. SCA Charity does this by issuing a consent form to all new supporters and donors requesting permission to maintain their personal information and offering the options to receive certain types of information from the Charity or none at all.
- 3.6 This consent is recorded and updated on the Harlequin system. For CFRs consent is sought at the first enquiry stage and recorded on the Harlequin system. In all cases it is made clear to data subjects how their data may be used.

- 3.7 It is essential that South Central Ambulance Charity is able to securely record and manage personal data of supporters and volunteers and confidently able to assure all data subjects that their personal data is kept secure.
- 3.8 Volunteers in the context of this policy and the records and data held by the Charity are defined as any individual who gives their time on a voluntary basis to support the Charity and/or SCAS. Primarily this refers to the c1000 Community First Responders currently actively volunteering for the organisation but also includes a small number of Charity volunteers
- 3.9 Supporters in the context of this policy and the records and data held by the Charity are defined as any individual who makes a donation, requests our newsletter or expresses an interest in supporting the Charity.
- 3.10 Charity CRM software enables records to be kept securely with access restricted only to those who need it. Individual access is by individual user login and unique password.
- 3.11 Using the Harlequin database enables us to:
- 3.11.1 Record volunteer applications, driving license information, all training and re qualifications, DBS records and communications
 - 3.11.2 Record supporter information including donations received, a full giving history and communication of newsletters, appeals and other information.
 - 3.11.3 Record individual consent from all supporters and volunteers including their individual mailing and communication preferences.
 - 3.11.5 To build effective and long lasting relationships with supporters interested in supporting the Charity and SCAS through a variety of means including financial donations.

4. Individuals with Access to the Database

Access to the Harlequin CRM database is strictly limited to individual staff within the South Central Ambulance Charity and SCAS's Community Engagement and Training Team who manage the clinical role and training of our CFR volunteers. Access is then further managed to ensure individuals only have access to the areas and information they need to fulfil their job.

Full Access and System Administrator Rights:

Charity CEO

Head of Operations – Community Engagement and Training Team

Operations Manager – Community Engagement and Training Team

Limited Access:

Community Engagement and Training Officers

Charity Officer

Community Engagement and Training Administrators

Individual user accounts are personalised to the staff member and deleted when they leave the employment of the Charity or SCAS or move to a different area of work where access to the system is not required.

New individual users are set up on the system by a System Administrator and issued with a user name and password. Users are instructed to change their password to their own unique password on first accessing the system.

5. Training and Use of the System

All required users are given internal training and guidelines, as well as access to the Systems Administrators and the Harlequin helpdesk for support. All users are given clear guidelines on the information that should be recorded on the system. Users are given full training and information on the regulations surround the Data Protection Act 1998 and the General Data Protection Regulation 2016 and are required to update their Information Governance compliance training on an annual basis.

Internal training updates and communications are regularly issued to all users to ensure we keep up with best practise and are consistent and accurate in the recording of information.

6. Related Policies

- 6.1 South Central Ambulance Charity Privacy Policy – www.sca-charity.org.uk
- 6.2 South Central Ambulance Service NHS Foundation Trust Privacy Policy – www.scas.nhs.uk
- 6.3 South Central Ambulance Charity – Retention of Data Policy