GDPR Data Protection Principles and Sage 50 Payroll (UK)

Under the General Data Protection Regulation (GDPR), you need to make sure you have policies and procedures in place to cover the data protection principles. You can find more detail about this from the ICO website, but to help you, we've put together some of the key points.

Fair and lawful processing in a transparent manner

You need to have a lawful basis for processing personal data. You can find out more about the lawful bases from the ICO website.

The data you submit to HMRC and your pension provider through your Sage software is encrypted so you can be confident it's safe and secure

Collected for specified legitimate purposes

You should have procedures in place for identifying the reason for processing personal data. You need to have a clear and compelling case for why you need to use a person's data and it's good practice to document the reasoning behind your decision. This also applies to data used for marketing purposes.

Adequate, relevant and limited to what's necessary

You shouldn't collect more data that is necessary for the original purpose. The best practice is to calculate the information you need in order to achieve your goals and document this.

Accurate and, where necessary, kept up to date

You should take reasonable steps to ensure the personal data you hold is accurate and up to date and have a process in place to address how you'll maintain the data you're processing and storing, for example, carrying out regular audits.

Kept in a form that permits identification for no longer than is necessary

The GDPR doesn't set out any specific minimum or maximum periods for keeping personal data, instead, it says you must keep data no longer than is necessary for the purpose you obtained it for. This protects the individual by making sure irrelevant out of date information is deleted. You should review the length of time you keep personal data for and if you don't already have one, create a retention policy.

You can easily view your employee's personal data in Sage 50 Payroll and you can also store documents in the employee record. Alternatively, you can record this in your procedures outside of the software.

Once you've identified your retention dates, you need to remove any data that's no longer than necessary. In Sage 50 Payroll, you can manually amend any field that contains personal data. You can also delete an employee record if the employee left more than three years prior to the current tax year. For more information http://ask.sage.co.uk/scripts/ask.cfg/php.exe/enduser/std_adp.php?p_faqid=2595

Pimbrook GDPR Product Guide-Sage 50 Payroll(UK).docx

Processed in a manner that ensures appropriate technical and organisational security

You should keep the data you hold safe and secure and ensure you have appropriate protection and information security policies, procedures and standards in place. These apply to IT systems, paper records and physical security.

In terms of your software, you must ensure that your computer or network on which it's installed is secure. If necessary, check with your IT support.

Under the GDPR, you should no longer send backups via email. If you need to send your data to support, you should ensure your data is password protected then upload your backup securely using your My Sage account or Pimbrook Account.

Consent

If you have another lawful basis for collecting personal data, you may not always need consent but you need to have policies in place for this. You can find out more from the ICO website.

You need to get consent from your employees' emergency contacts to collect their data. Once you have received consent, you can record this in the employee's emergency contacts option:

1. On the Employee List, double-click the required employee.
2. Click **Emergency Contacts** then select the **Consent received** check box.
3. Click **OK** then click **Save** then click **Close**.

You can also use the documents option in Sage 50 Payroll to store any documentation of consent.

GDPR - Individual rights and Sage 50 Payroll

Under the General Data Protection Regulation (GDPR) individuals have increased rights over the personal data you hold on them. This includes the right to know why you're holding their data and what you're using it for, as well as the right to request the data is rectified or destroyed.

You need to make sure you're aware of an individual's rights. You can find out more detail about each right from the ICO website.

Right to be informed

You must tell people what you're doing with their personal data, this includes any data that you hold in Sage 50 Payroll. Your company would normally need a privacy statement or notice to cover this. You can find out more about what type of information you need to inform individuals about from the ICO website.

HMRC require that you include certain information in the full payment submission (FPS) every pay period.

Right of access

Individuals have a right to access their personal data, so they are aware of what data you hold and what you're holding it for. They have a right to:

- Confirmation that you're processing their data.
- Access their personal data.
- Access other supplementary information.

If an individual send you a subject access request, you must send them the relevant information.

Right to rectification

You must make sure that the personal data that you hold for individuals is accurate and up to date. If an individual asks you to correct their data, you must update this in Sage 50 Payroll. You must respond to the individual within one month, or two months if the request is complex.

In Sage 50 Payroll, you can manually amend any field that contains personal data.

Right to erasure (right to be forgotten)

Unless there's another legal reason for keeping personal data, you must delete or remove the data at the request of the individual. You can find out more about when this right applies and other conditions from the ICO website.

HMRC require that you store payroll information for the current tax year and a minimum of three years prior to the current tax year.

In Sage 50 Payroll, you can manually amend any field that contains personal data. You can also delete an employee record if the employee left more than three years prior to the current tax year.

Right to restrict processing

Individuals have a right to block or suppress processing of their personal data. If they request this, you can still store their personal data, but you can't process it further. You can keep just enough information about them to make sure the restriction is respected in the future. Read more >
If necessary, you can amend information within an employee record to anonymise or remove non-relevant information.

Right to data portability

If an individual has provided their personal data to you on the basis of consent or contract, they have a right to request that the data is returned to them in a structured, commonly-used and machine-readable format, for example, an Excel or CSV file, rather than a Word or PDF document. Read more >
You can use the export data option to export data from Sage 50 Payroll.

Right to object

Individuals have a right to object to you processing their personal data. This is mainly aimed at using their data for direct marketing, including profiling, however there are other legitimate reasons for objecting.

Right not to be subject to automated decision making, including profiling

Pimbrook GDPR Product Guide-Sage 50 Payroll(UK).docx

Individuals have a right to object to being subject to a decision based solely on automated processing, including profiling. If you use an automated decision-making system, it should allow for a human intervention.

Disclaimer

The information provided in this document is for guidance purposes only. It should not be taken for, nor is it intended as, legal advice. While we have made every effort to ensure that the information is correct and up to date, Pimbrook makes no promises as to completeness or accuracy and the information is delivered on an "as is" basis without any warranties, express or implied.

Pimbrook will not accept any liability for errors or omissions and will not be liable for any damage (including, without limitation, damage for loss of business or loss of profits) arising in contract, tort or otherwise from the use of or reliance on this information or from any action or decisions taken as a result of using this information.

Pimbrook GDPR Product Guide-Sage 50 Payroll(UK).docx