

e-BAS Accounts Privacy Policy (as at March 2014)

PART 1 - Consideration of personal information privacy - open and transparent management of personal information

- We only collect data from you that is required for the purpose of completing your bookkeeping assignment.
- Data collected from you will include addresses, telephone numbers, email addresses and postal addresses relating only to your business. We do not collect your personal contact details unless you provide them (because they are in some way related to your bookkeeping assignment).
- We will also collect data relating to your taxation status e.g. GST registration, Australian Business Number, PAYG registration and business structure type. We may also require your Tax File Number and information relating to your superannuation fund membership.
- If we process your payroll for your business, we will have access to your employees' personal contact details, their Tax File Numbers and superannuation fund membership.
- If you request that we have access to your online business bank account, we request that you arrange this via your bank. We do not ever use your personal login details so do not provide them to us.
- Other Data collected will relate to your tax accountant's contact details. We suggest that you get permission to provide that information to us before doing so.
- We collect the above data by way of questionnaires, forms, telephone meetings and Skype meetings. The data is then recorded in our database which can be found in our project management software known as Teamworkpm and also Google Drive and Dropbox. Some of this data will also be accessible from a client's accounting software.
- Data is collected from you, the client in the first place, however, we may collect data from your employees if you have first given permission for your employees to do so.
- As e-BAS Accounts only works with clients in Australia, we will not have the need to disclose any clients' personal information to overseas recipients.
- If you wish to complain about how we have dealt with your data, please put your complaint in writing either via email or a letter and address it to the owner, Louise McLoughlin (address details can be found on our contacts page). Your complaint will be considered and you will be involved at all levels of any discussion that may result.
- Our privacy policy is available free of charge as a pdf document download on our website which can be found at the bottom of this page.

PART 2 - Collection of personal information

- If we receive information about you which is personal in nature and which is not required for purposes of completing your bookkeeping assignment, this data will be destroyed either by way of paper shredding or deleting a computer file. We will also advise you in writing about what was received, how we received it and how we disposed of it.

PARTS 3 - Dealing with personal information

- Your data is held by us in strict confidence. We will never divulge your information to any other organisation or person unless first requested by you in writing.
- Our direct marketing strategy is email-based. As an e-BAS Accounts client, you will be placed on the email newsletter list held by "Campaign Monitor". Our newsletter is sent on a bi-monthly basis. You can easily opt out of receiving our newsletter by following the prompts on the newsletter at any time.
- Even though we may request that you provide us with your Tax File Number (known as a government-related identifier), we will never use that number as our own identifier for you in our database.

PART 4 - Integrity of personal information

- In order to ensure that your personal data is accurate, up to date and complete, we will send you an electronic form to complete which will require you to inform us of any changes and amendments to your data. We will send this form to you in December each year.
- If you have indicated via the form that amendments are required, we will make those amendments in our database immediately.
- The data we hold about you on your behalf is kept securely within our electronic systems which are backed up daily via our online backup software, Jungle Disk. Data held within Teamworkpm is backed up by their own facilities on our behalf.
- All data is password-protected i.e. it not possible to access any client data without first using a secure password. Staff are provided with passwords as required which are kept on a master list within 1Password, our secure password-keeper software. Passwords are required for Google Drive, Dropbox and Teamworkpm access. Passwords are also required to access browser-based accounting software.
- If our computers were to be stolen or lost via natural disaster, your data will remain secure as it is kept electronically "in the cloud" with Google Drive, Dropbox and Teamworkpm.
- If your accounting software is desktop-based, your accounting file is backed

up each time it is changed to a USB drive which is stored in lockable cabinets in our office. Backups are also saved to our hard drive which are then backed up via Jungle Disk each day as a secondary backup in case of loss of computers.

- Your data will be retained by us after you cease being our client for a period of 5 years as stipulated by the Australian Taxation Office (minimum period in which to keep records relating to our business activities). After this time, your data will be destroyed and/or deleted from our systems. Any data which we believe should be returned to you will be sent to you as required after the 5 year period.

PART 5 - Access to and correction of personal information

- You will always have complete and full access to any of your information held on your behalf except in circumstances which may be unlawful (or is required by law) or if providing access in some way poses a serious threat to your safety or health. We may also refuse access if providing particular data may indirectly impact on the privacy of other persons. You will be given written notice if it is not possible to provide you with access to your data.
- If a client wishes to access his or her data, they must send an email to us and request this in writing. We do not divulge information to anyone via telephone.
- If you make a request to access your data, we will provide that data as quickly as possible and we will provide it in the format you request.
- Your data will be provided to you at no cost.
- Your personal data will be amended by us if required in order to keep it up to date, complete and relevant for the purposes of assisting us to complete your bookkeeping assignment.
- As mentioned above, we will send you a form to complete each year that will allow you to inform us of any changes to your personal data. You may, of course, send us an email to inform us of any changes to be made at any time.