LetMC.com®

Letting & Estate Agent Software

An Introduction to GDPR Features in LetMC Agent

The content of this document is not legal advice. You should consult a legal advisor on your GDPR responsibilities.

Contents

General Data Protection Regulations

Changes are being made to LetMC Agent to ensure that you (the controller of the data) can meet your obligations under the GDPR requirements.

The following sections will give you an overview of the changes that are being made when it comes to dealing with a client's data in line with the new GDPR requirements.

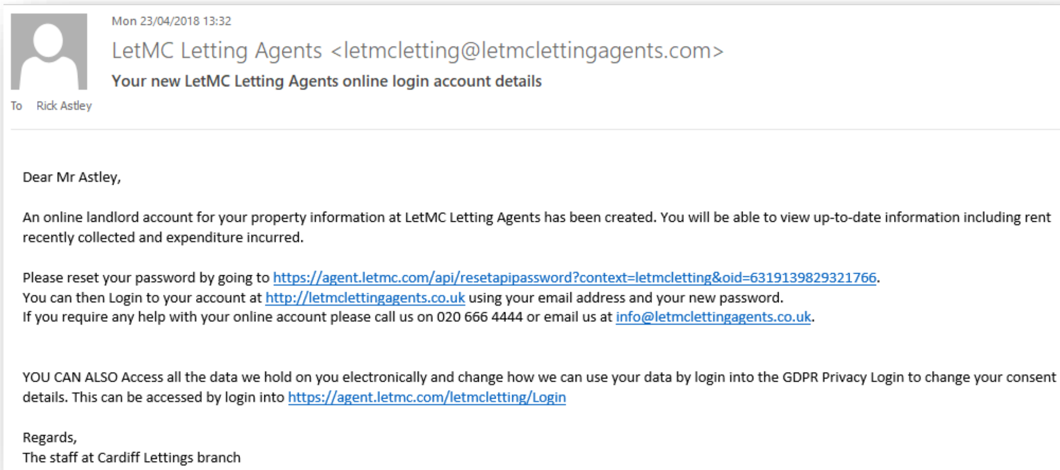
These features will only be accessible to users of LetMC Agent, no changes will be made to LetMC Classic.

General Data Protection Regulations – Access

Individuals have the right to access their personal data and supplementary information.

With the introduction of the GDPR requirements to LetMC Agent, you will now be able to provide an online account for every client on the system (Tenant, landlord, contractor, etc…), as long as they have an email address*.

When a client is created on the system and an email address is present, the client will receive an email inviting them to set a password for their new online account.


Mon 23/04/2018 13:32

LetMC Letting Agents <letmcletting@letmclettingagents.com>

Your new LetMC Letting Agents online login account details

To Rick Astley

Dear Mr Astley,

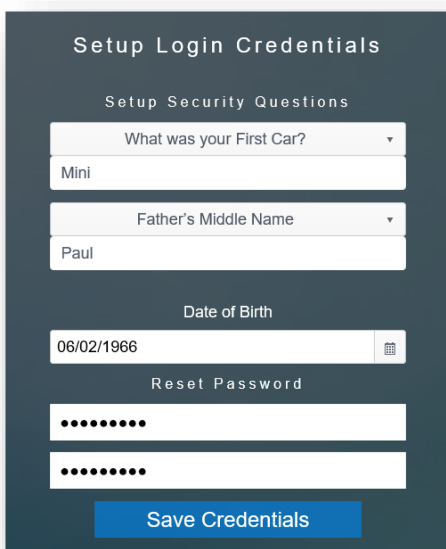
An online landlord account for your property information at LetMC Letting Agents has been created. You will be able to view up-to-date information including rent recently collected and expenditure incurred.

Please reset your password by going to https://agent.letmc.com/api/resetapipassword?context=letmcletting&oid=6319139829321766.
You can then Login to your account at http://letmclettingagents.co.uk using your email address and your new password.
If you require any help with your online account please call us on 020 666 4444 or email us at info@letmclettingagents.co.uk.

YOU CAN ALSO Access all the data we hold on you electronically and change how we can use your data by login into the GDPR Privacy Login to change your consent details. This can be accessed by login into https://agent.letmc.com/letmcletting/Login

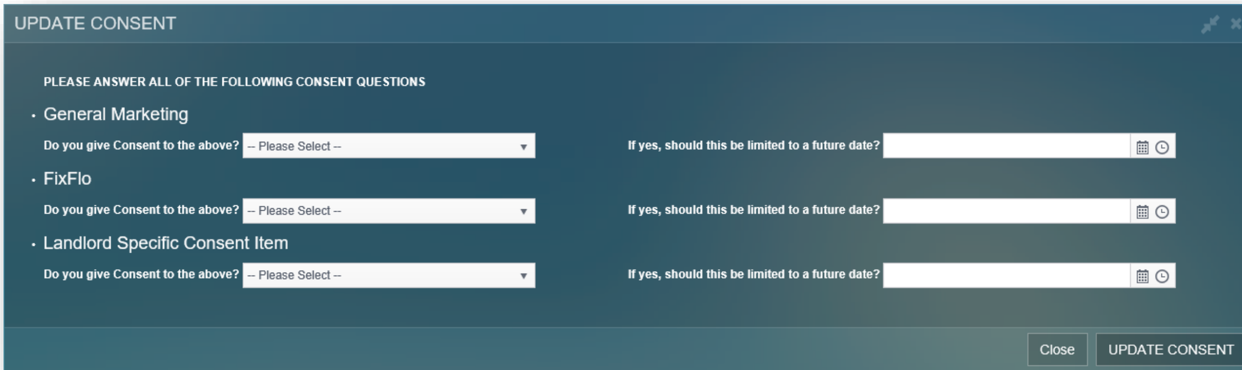
Regards,
The staff at Cardiff Lettings branch

The link within the email will take the client to a password creation page linked to LetMC Agent, which is used by the existing Landlord Portal.



Once an account is created the client is taken to a login screen that will log them in to their account on your company. The login form is the same form used when you login to your company on LetMC Agent.

On their first login, the client will be asked to answer "Yes" or "No" to any consent items that have been set (More on Consent in the next section).

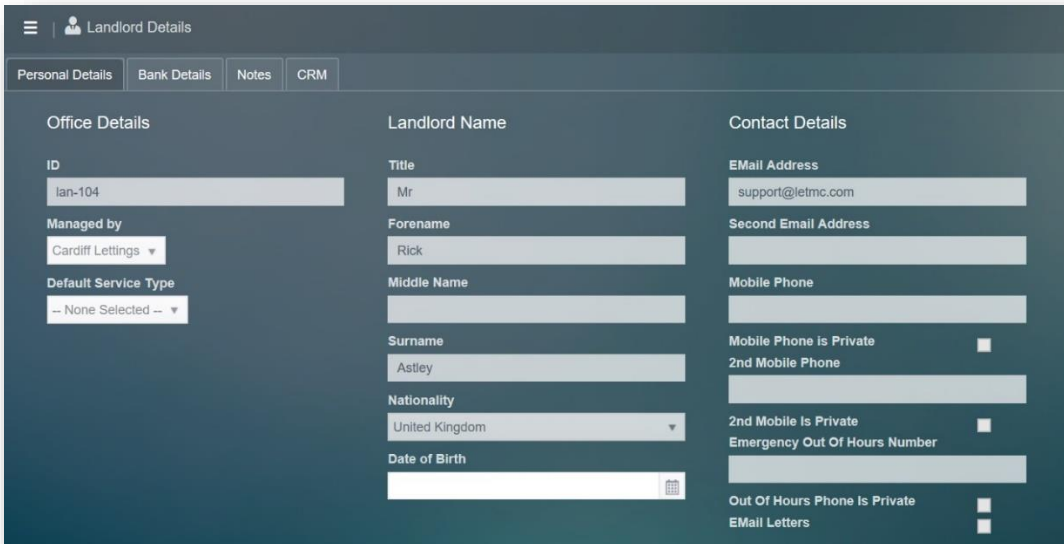


Once the client has answered the consent questions, they will be taken to their online account. The first page the client will see is the list of the consent questions they have just answered.

As with your version of LetMC Agent, there are tabs along the top of the screen, but the client will only have access to "How can we use Your Details?" and their personal information (The tab uses the person's unique ID that is generated by LetMC Agent for the name).

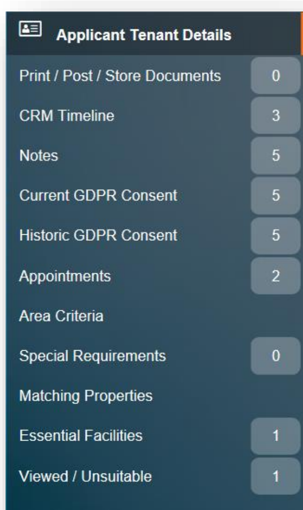
If more than one client is linked to this online account (Either automatically based on CRM Groups or manually added by a user of LetMC Agent), additional tabs will appear along the top for each person linked.

To view their personal information, the client clicks on the tab to the right of "How can we use Your Details?", in the image above this is named "lan-104". Clicking on this tab will load a view that will be familiar to you, as a user of LetMC Agent. Any personal data that is held about this client is displayed to them through the traditional LetMC Agent views.



None of the data held on this client is editable by them, they are restricted to "View Only" access on everything apart from Consent Questions, which they will be able to update at any time.

As well as the traditional tabbed detail view in the centre of the page, the client will also have the ladder menu on the left-hand side. The items here will match what you, as a user of LetMC Agent, see when accessing their profile. But, not all items will be displayed.



In addition to accessing their data through the online account, the client will have a number of actions available to them. As with the LetMC Agent system, an “Action” menu is present, allowing the client to request a copy of all of their data and request that their data be deleted (Right to Erasure).

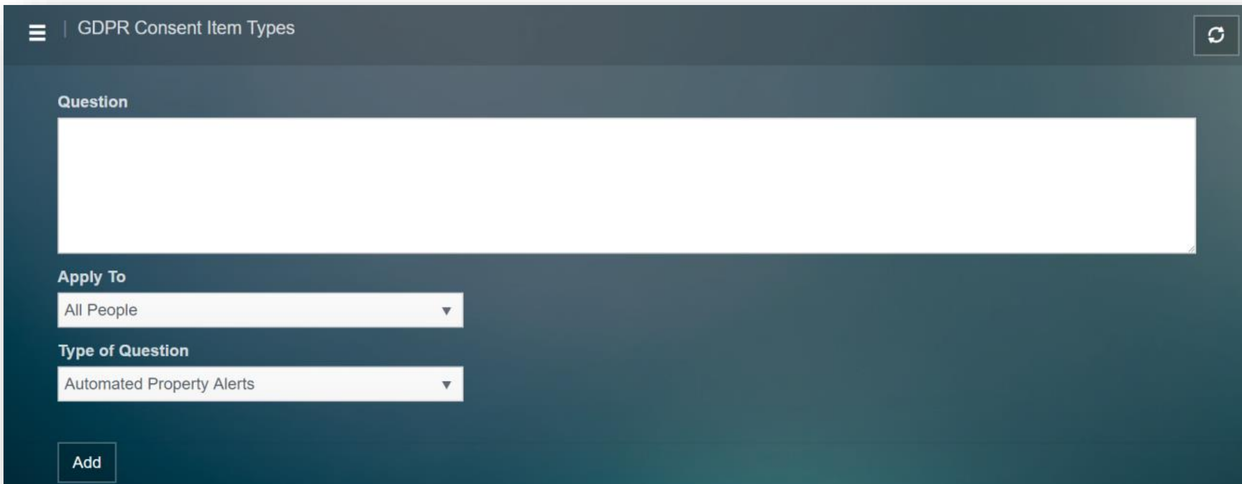
**If no email address is provided, the client will not be able to access their data or update their consent items. Consent is still required and must be done in person; over the phone or by hand and recorded correctly on the system by a user of LetMC Agent.*

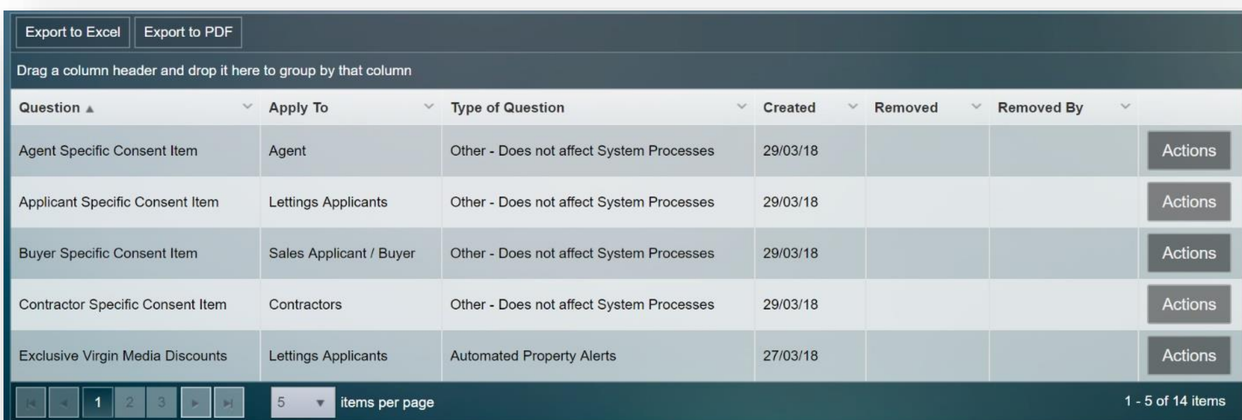
General Data Protection Regulations – Consent

Consent cannot be bundled with other matter like general terms. Companies must demonstrate evidence that consent was given.

As discussed in the previous section, a client is required to answer a number of questions on how their data is used.

Out of the box, there will be a number of system default “Consent Item Types”. But, you will be able to customise the item types with your own additions. Under “Object Types” there is a new item called “Consent Item Types”.



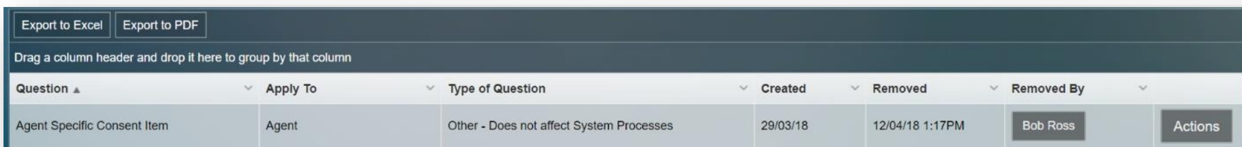


Question	Apply To	Type of Question	Created	Removed	Removed By	
Agent Specific Consent Item	Agent	Other - Does not affect System Processes	29/03/18			Actions
Applicant Specific Consent Item	Lettings Applicants	Other - Does not affect System Processes	29/03/18			Actions
Buyer Specific Consent Item	Sales Applicant / Buyer	Other - Does not affect System Processes	29/03/18			Actions
Contractor Specific Consent Item	Contractors	Other - Does not affect System Processes	29/03/18			Actions
Exclusive Virgin Media Discounts	Lettings Applicants	Automated Property Alerts	27/03/18			Actions

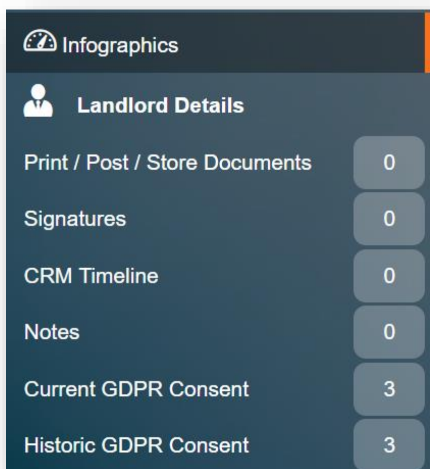
Consent items can be customised in three ways:

1. Question – Free form text box, no character limit.
2. Apply To – Choose who the consent item should apply to (All People, Tenant, Landlord, Contractor, Lettings Applicants, Vendor, Sales Applicant/Buyer, Solicitor, Agent)
3. Type of Question – Choose the system process that the consent item is for (Automated Property Alerts, 3rd Party Suppliers, Just a Statement (No question), Other (Doesn't affect a system process)

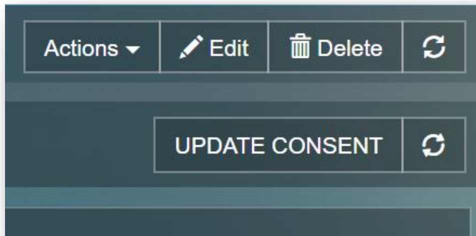
Consent items cannot be deleted, only removed from the consent form. When a consent item is removed, a note is added to the grid with the date and the user who removed it.



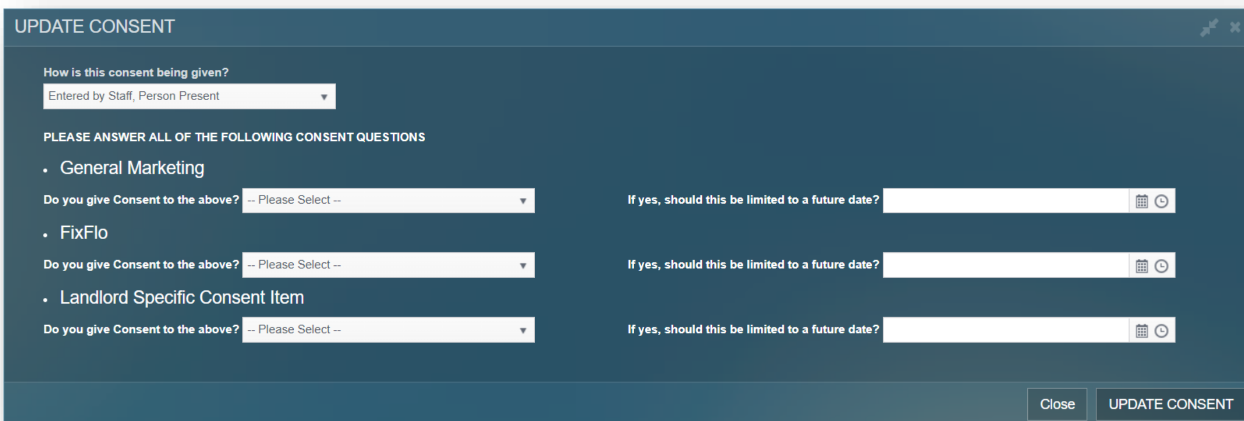
Each client on the system now has two additional items in the ladder menu on their record: "Current GDPR Consent" and "Historic GDPR Consent".



To record consent for a client, navigate to “Current GDPR Consent” on their profile. If consent has already been given, the grid will display their current choices. If no consent has given, the grid will be empty. On this page there is an “Update Consent” action, which, when pressed, will load the Consent Form.



Even if the client has given consent to items previously, the answers will all revert to “Please Select” and must be answered again.



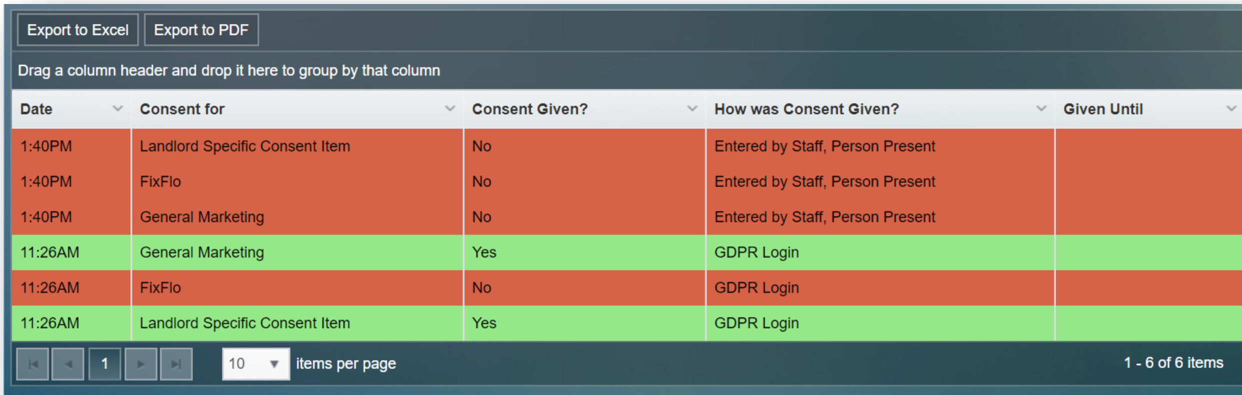
The client must answer all Consent Items, with a “Yes” or “No”. In addition to this, the client may specify a date where the consent will expire and consent will need to be requested again.

When a user records consent on behalf of the client, the user can choose how consent has been given. The three options available are:

1. Entered by Staff, Person Present
2. Entered by Staff, Paper Form
3. Entered by Staff, Over Phone

To ensure a clean audit trail, a note is created on the client stating when and by whom the consent items were updated.

Once consent is recorded (Either for the first time or renewing consent), the consent answers are recorded under “Historic GDPR Consent”, which allows you to view the current consent answers and any historic answers.



Export to Excel Export to PDF

Drag a column header and drop it here to group by that column

Date	Consent for	Consent Given?	How was Consent Given?	Given Until
1:40PM	Landlord Specific Consent Item	No	Entered by Staff, Person Present	
1:40PM	FixFlo	No	Entered by Staff, Person Present	
1:40PM	General Marketing	No	Entered by Staff, Person Present	
11:26AM	General Marketing	Yes	GDPR Login	
11:26AM	FixFlo	No	GDPR Login	
11:26AM	Landlord Specific Consent Item	Yes	GDPR Login	

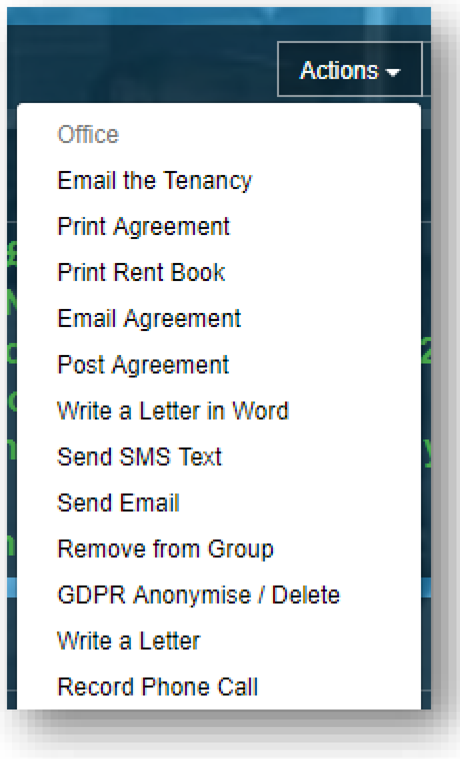
1 10 items per page 1 - 6 of 6 items

General Data Protection Regulations – Erasure

The broad principle underpinning this right is to enable an individual to request the deletion or removal of personal data where there is no compelling reason for its continued processing.

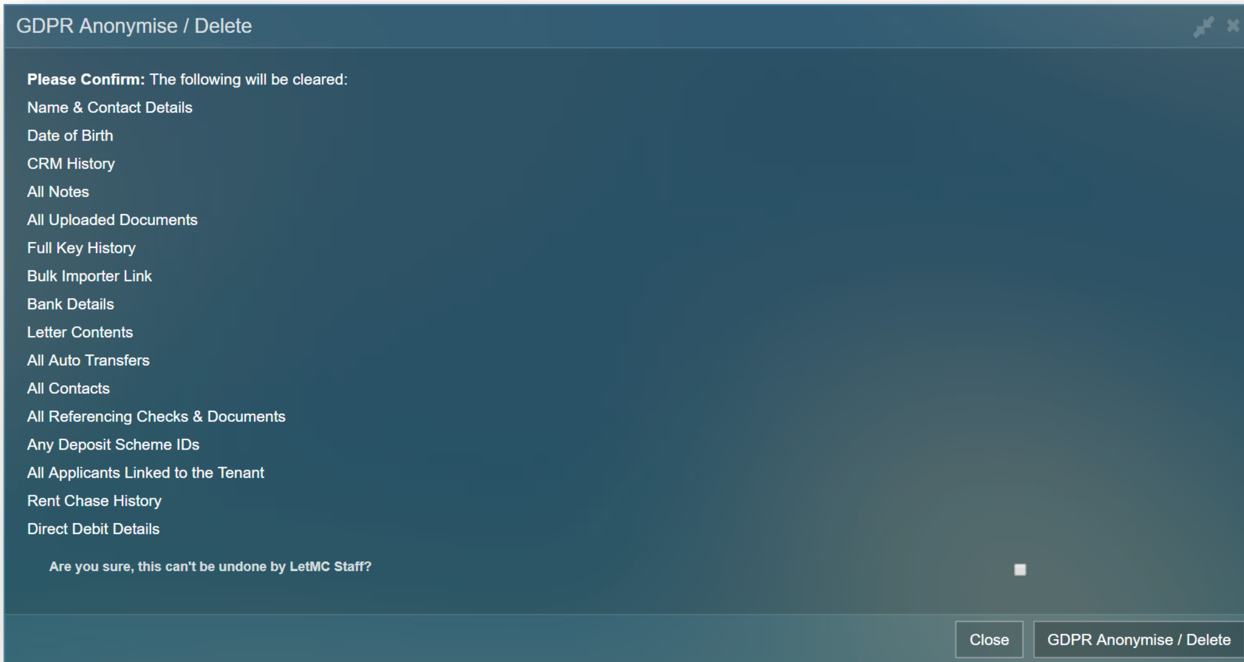
Each and every client on the system now has the right to request that their data be deleted (Unless there is a legitimate business reason for keeping a record).

To aid with this requirement, we have introduced a new “GDPR Anonymise/Delete” action on every client.



This action is irreversible and should only be used when requested. As a failsafe, it requires three clicks to anonymise a record (Click “GDPR Anonymise/Delete” > Tick the box confirming you wish to anonymise the record > Click “GDPR Anonymise/Delete” in the pop up to complete the action).

For every client record on the system, a particular set of data will be deleted (Please see list of data at end of the document).



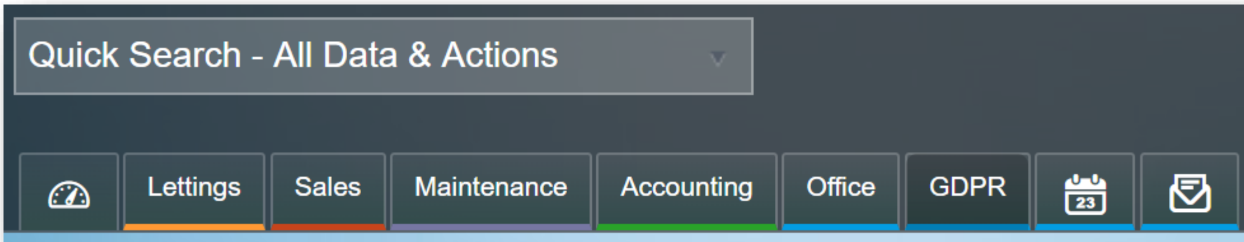
Each item listed in the pop up will either have any words replaced by “Anonymised” (All notes are deleted and replaced with an audit note identifying who anonymised the record and when).

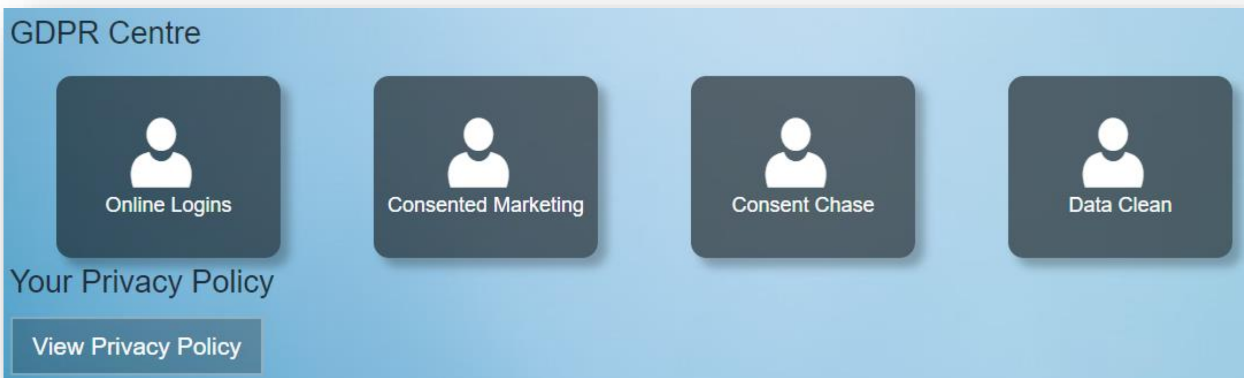
Emails are not included in this action and instead can be deleted individually should the client request a particular email be deleted.

General Data Protection Regulations – A Helping Hand

As well as introducing new features to aide you in meeting your obligations as a data controller, we have also been working on tools that allow you to monitor anything GDPR related.

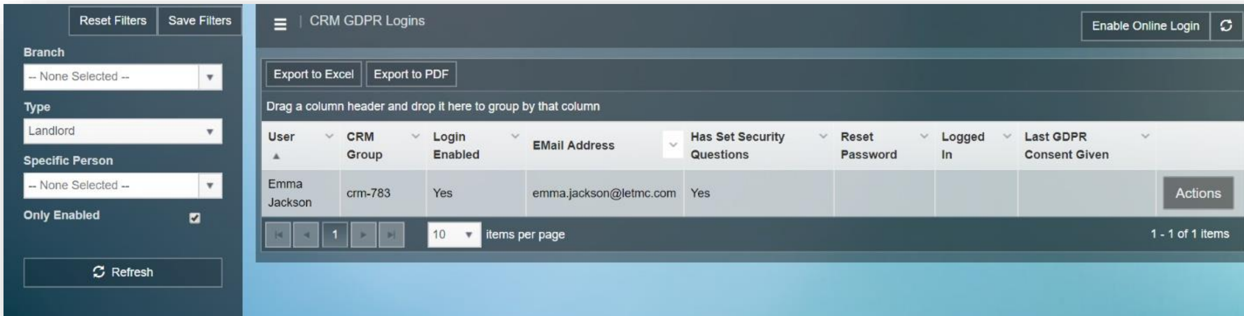
There is now a dedicated "GDPR" tab where all of the tools will be available to more easily allow you to stay on top of any GDPR issues.





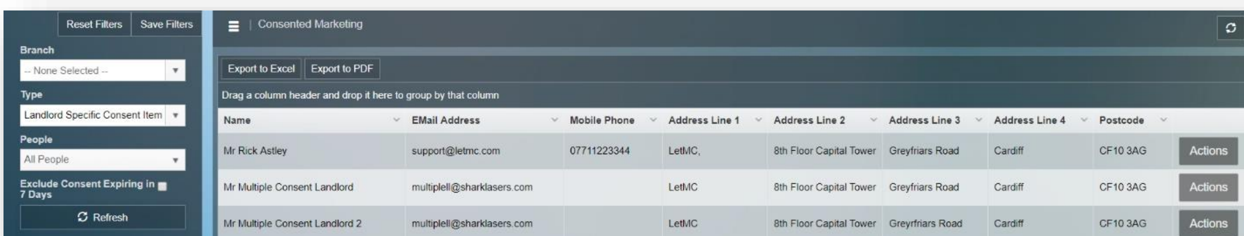
Online Logins

We have moved the “Online Logins” item from “Lettings” into the “GDPR” tab. From here, you will be able to Enable, View, Edit and Disable GDPR logins. The usage and functionality hasn’t changed at all from our traditional “Online Logins” functionality.



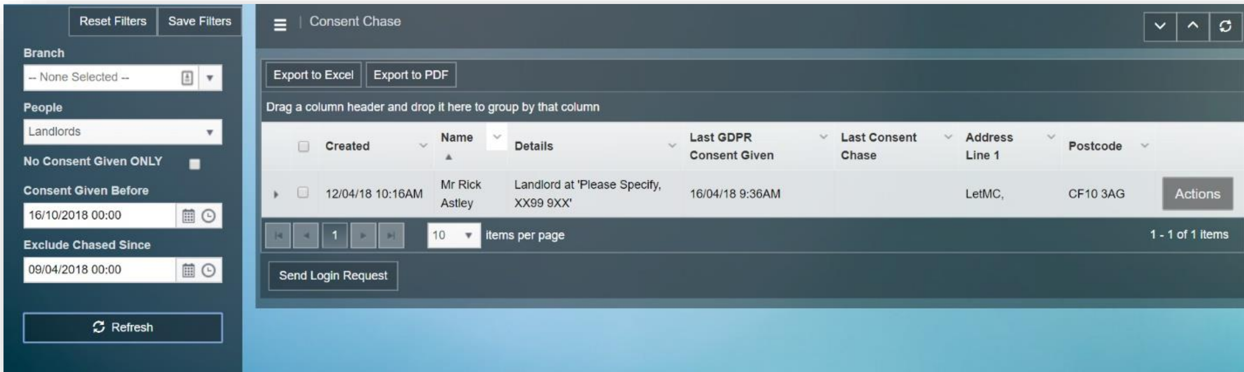
Consented Marketing

View a report of people who have consented to a consent item of your choosing. This report could be used if you want to send a mass email to all of your landlords, or if you use a third-party company and wish to send the details of the clients who have consented to having their data shared.



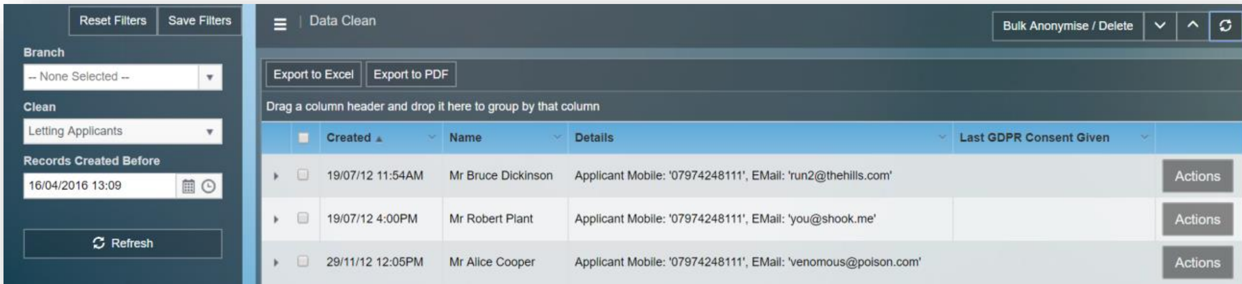
Consent Chase

To help you keep on top of who has or hasn't given consent, the Consent Chase tool will allow you to check for clients who gave consent before a certain date or for those who have yet to provide consent.



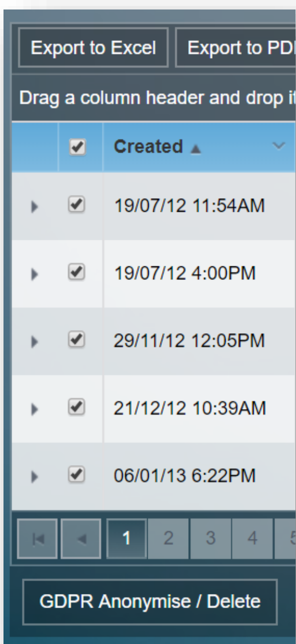
Data Clean

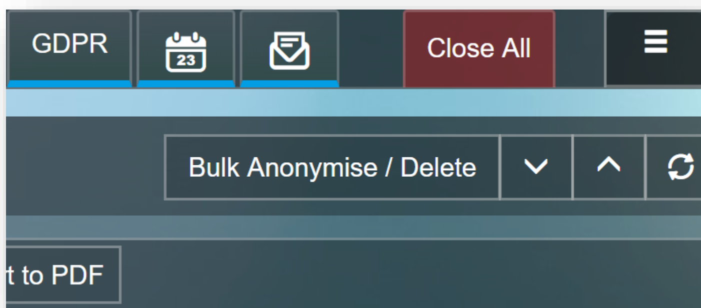
To aid you in ensuring you are only keeping useful, up to date information, the Data Clean tool allows you to report on lettings or sales applicants created before a certain date (Sales Applicants who have been converted into a buyer will not be displayed).

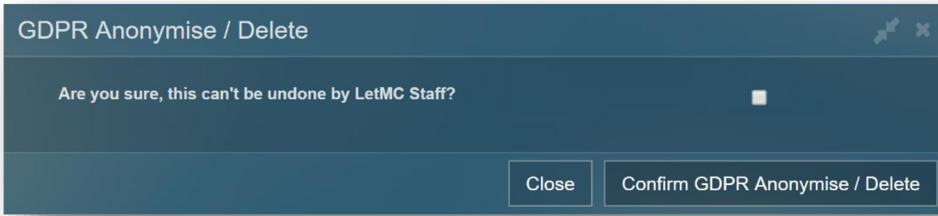


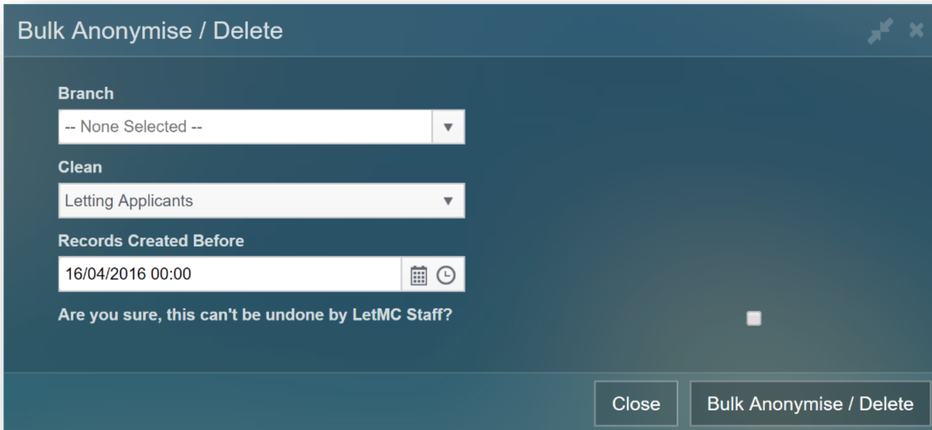
Not only are you able to report on applicants created before a certain date, you are also able to perform a GDPR Anonymise/Delete action (As mentioned in a previous section). Two actions are available to you:

- Bulk Anonymise/Delete – Anonymise or delete an applicant record if created before a certain date.
- GDPR Anonymise/Delete – Select multiple applicant records to anonymise or delete.







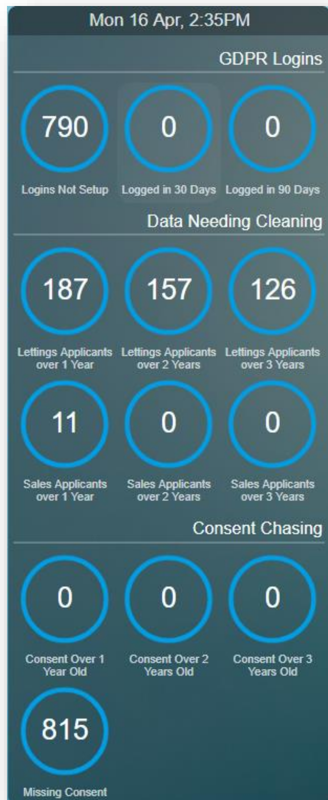


Anonymise multiple records with the use of the multi select or bulk actions on Data Clean.

You can still anonymise individual records by going to the Actions menu on the client and selecting “GDPR Anonymise/Delete”.

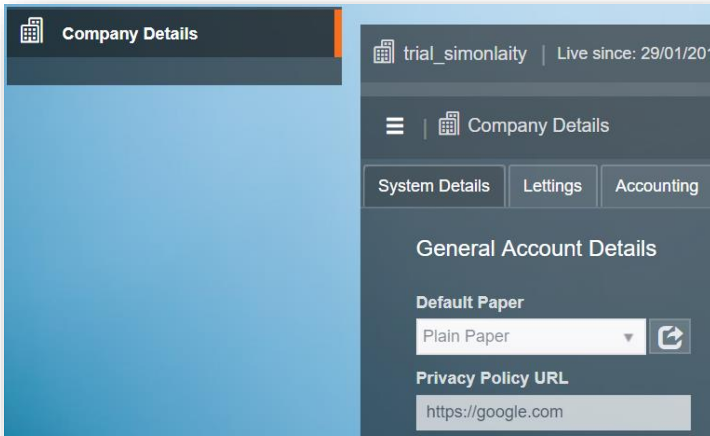
Stats

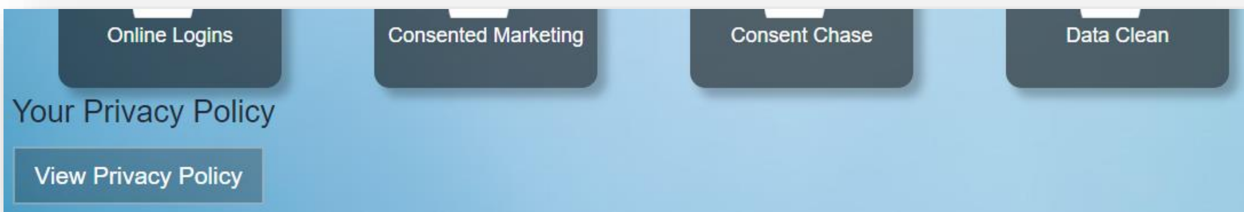
For a quick visual overview of your current GDPR status, a report driven Stats info panel is located on the GDPR tab. Clicking on each individual set of data will open the corresponding report.

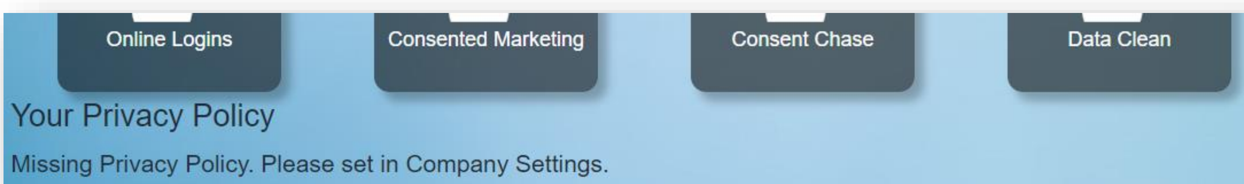


Privacy Policy

Add a link to your Privacy Policy page so that you have it to hand should a client have any questions regarding your compliance with GDPR.







If a link has been added to the field under Company Settings, a button to the website/document is displayed. If no link is provided, a prompt is displayed. A link to your privacy policy is also included in the emails sent to clients when setting up their online account.

List of Data Items Anonymised/Deleted

Applicant

- Delete the Applicant Record
- Delete all Referencing Checks & Documents
- Delete all Letters

Tenant

- Name & Contact Details
- Date of Birth
- CRM History
- All Notes
- All Uploaded Documents
- Full Key History
- Bulk Importer Link
- Bank Details
- Letter Contents
- All Auto Transfers
- All Contacts
- All Referencing Checks & Documents
- Any Deposit Scheme IDs
- All Applicants Linked to the Tenant
- Rent Chase History
- Direct Debit Details

Landlord

- Name & Contact Details
- Date of Birth
- CRM History
- All Notes
- All Uploaded Documents
- Full Key History
- Bulk Importer Link
- Bank Details
- Letter Contents
- All Auto Transfers
- All Contacts
- All Referencing Checks & Documents
- Any Deposit Scheme IDs
- License Number
- Links to LR Searches