

# **Energy Performance Advice Limited Privacy Policy for EPC Assessors using our services**

## **Our contact details**

Name: Energy Performance Advice Limited

Address: 9 Bridgewater Place, Manchester M4 1QF

Phone Number: 0161 832 3280

E-mail: [info@epims.co.uk](mailto:info@epims.co.uk)

Date: 8 April 2025

## **What this Notice is about**

This Privacy Notice tells you what information we obtain and hold about you and your clients whether you are enquiring about our services or whether you request or order an epIMS report. It explains what information we collect, why we collect it, and what we do with it, as well as who we share it with. We collect and handle personal information about our customers to enable us to provide advice and reports on the energy performance of properties and improvement works that may be available. This includes your contact information, publicly available information on the properties, further information on the properties received from you, dealing with any complaints and maintaining our accounts and records

We call this information “your information”. It is also referred to as “data”.

Where this notice is given to more than one person it is given to each of you separately.

You should read this notice when you give us information so you are aware of how and why we are using this. Please update us if any information supplied by you changes.

## **Why we are giving you this notice**

We are required by data protection law to give you this notice. We must be open with you about why information is collected about you and then what is done with it. We must act fairly in relation to this information. You have various legal rights relating to this information which are spelt out in more detail in this notice.

In order that we can collect or use information about you there must be a legal basis or gateway for doing so. This notice identifies the relevant gateway for the various types of

information we collect and hold about you. A detailed explanation of these gateways is given in this notice.

Under data protection legislation we can only process data “as necessary” and only to the extent that it is needed. For example, we can use your bank details regarding payments and other limited purposes only. However, in certain instances, as necessary, we can share any of your data, e.g. with our own professional advisers. We may also share any of your data, as necessary, with the police / law enforcement agencies or regulatory authorities.

## **The type of personal information we collect**

We currently collect and process the following information:

- Information our servers collect automatically such as your device’s IP (Internet Protocol) address, what web browser you were using, time and date of your visit and pages visited. This is counted as personal information as it may be possible to combine with other data to personally identify users.
- Personal identifiers, contacts and characteristics (for example, name, contact details and email address)
- Property Addresses
- Your clients’ property addresses (we do not store or process your clients’ names unless requested to do so)
- EPC (Energy Performance Certificate) rating(s) (if applicable)
- All information detailed on EPCs supplied (if applicable)
- Council Tax bands
- Emails texts and other communications and via our website.
- Website and online portal information.
- Any other information provided, voluntarily, by you, which is relevant to the provision of our services

We also generate and use data internally, e.g. recommendations regarding energy performance of properties.

We also collect and receive data about you and your clients’ properties from third parties. Public bodies such as local authorities or Government publicly available information may provide information about properties. Any information which we receive in this way is set out in this privacy notice, which gives you more details about information which we can receive from third parties.

## **Sharing data with others**

We will share information we hold with others, where this is necessary. We will not share your, or your clients', information with third parties for advertising purposes.

## Use of Cookies

We use "cookies" to help us analyse our web traffic, these cookies are solely for analytics purposes and help us understand how visitors interact with our website. This helps us improve your experience of using our site. Cookies are small files of information that a web server generates and sends to a web browser. Your privacy is important to us, and your data is handled with care.

We use "AcuityScheduling" for online EPC appointments and "Stripe" for payment processing. Data provided by you to those services goes directly to those services and we would draw your attention to the fact that they operate their own Privacy Policies and also set their own cookies.

<https://help.acuityscheduling.com/hc/en-us/articles/16726357347981-Data-privacy-and-AcuityScheduling> <https://stripe.com/gb/privacy>

## How we get the personal information and why we have it

Most of the personal information we process is provided to us directly by you for one of the following reasons:

- To provide advice on the energy performance of your clients' property or properties
- To provide reports on the energy improvement measures that can be made to the property or properties
- To contact and communicate with you

We also receive personal information indirectly, from the following sources in the following scenarios:

- Previous EPC (Energy Performance Certificate) assessors of the property
- Publicly available information on your client's property from Ordnance Survey, Local and Central government sources, although we may collect this information from authorised third party suppliers.

We use the information that you have given us in order to carry out the services requested by you.

We may share this information with:

- An EPC assessor to carry out a further or new assessment of the property.
- A contractor or installer of energy saving works, where requested by you
- Public bodies where required to do so by law

Under the UK General Data Protection Regulation (UK GDPR), the lawful bases, or gateways, we rely on for processing this information are:

- (a) Your consent. You are able to remove your consent at any time. You can do this by contacting us at the address given above.
- (b) We have a contractual obligation.
- (c) We have a legal obligation.
- (d) We have a statutory or other legal obligation.
- (e) We have a legitimate interest.

## **How we store your and your clients' personal information**

All our information is stored securely electronically on servers or devices. Certain information is also retained on a secure basis in hard copy format. Our systems are built on top of Amazon Web Services and any information provided to us will be stored in Amazon's "eu-west-2 (London)" datacentre on servers owned and operated by Amazon Web Servers.

We may contact you, from time to time, regarding our services, in which case we utilise a service called Mailchimp. The only data shared with Mailchimp is your name, email address. You can unsubscribe from receiving further information at any time and all communication utilising this service will offer you the option to unsubscribe. Mailchimp data is stored in the US (United States of America) but is fully GDPR compliant. For further information on Mailchimp and GDPR and their Privacy Policy please click the following link

<https://mailchimp.com/gdpr/>

Data can only be stored on a time limited basis and not indefinitely. We will hold personal data about your clients for 1 year following a request for a free epIMS report. We will hold personal data about your clients for 6 years following the purchase of a Premium Report. We are required to retain information for up to six years for tax purposes. Personal data about your clients will be retained for 10 years following the purchase of a monitoring report and will contact your client for consent to either retain or delete following this period. Please note that, for GDPR purposes, an address is counted as personal data.

We will then dispose your clients' information by secure disposal of any hard copy information and permanent removal of digital data from our servers and devices.

We will retain your personal data for 1 year following your last request for a free epIMS report. We will then dispose of your information by secure disposal of any hard copy information and permanent removal of digital data from our servers and devices.

## Your data protection rights

Under data protection law, you have rights including:

**Your right of access** - You and your clients have the right to ask us for copies of your/their personal information.

**Your right to rectification** - You and your clients have the right to ask us to rectify personal information you/they think is inaccurate. You and your clients also have the right to ask us to complete information you/they think is incomplete.

**Your right to erasure** - You and your clients have the right to ask us to erase your/their personal information in certain circumstances.

**Your right to restriction of processing** - You and your clients have the right to ask us to restrict the processing of your/their personal information in certain circumstances.

**Your right to object to processing** - You and your clients have the right to object to the processing of your personal information in certain circumstances.

**Your right to data portability** - You and your clients have the right to ask that we transfer the personal information you gave us to another organisation, or to you, in certain circumstances.

You are not required to pay any charge for exercising your rights. If you make a request, we have one month to respond to you.

Please contact us at [info@epims.co.uk](mailto:info@epims.co.uk), 0161 832 3280 or 9 Bridgewater Place Manchester M4 1QF if you wish to make a request.

## Why we process your data

We only collect and use your data when we have a legitimate reason to do so, such as that which is reasonably necessary to provide our services to you.

The various purposes for which it may be necessary for us to process various categories of your information include: -

- To perform our contract to complete the service requested
- For Advertising and Marketing of our services and those of third parties that may be of interest to you.
- For business development purposes
- For contractual performance or in our legitimate interests for recovering debts and other payments due.
- In our legitimate interests for the storage of emails, records of calls and other communications
- In accordance with our legal obligations if you exercise your rights under data protection law
- To perform our legal obligations for compliance with legal and regulatory requirements
- In our legitimate interests for the establishment and defence of legal rights

We may change the purposes where this is compatible for the purpose for which we obtained the data originally. If we need to use your data for a non-compatible purpose we will notify you and explain the legal gateway that allows us to do so. We may process your information without your knowledge where this is required or permitted by law.

## **Analytics**

We use “Amplitude” and “Google Analytics” to collect and process your data. This is to help us understand how people navigate and use our website and to improve our customers’ experience of using our site and services.

For more information on Amplitude, visit <https://amplitude.com/privacy>

If you don’t want Google Analytics to be used in your browser, you can [install the Google Analytics browser add-on](#). Learn more about [Google Analytics and privacy](#).

## **How to complain**

If you have any concerns about our use of your personal information, you can make a complaint to us at [info@epims.co.uk](mailto:info@epims.co.uk), 0161 832 3280 or 9 Bridgewater Place Manchester M4 1QF

You can also complain to the ICO if you are unhappy with how we have used your data.

The ICO's address:

Information Commissioner's Office  
Wycliffe House

Water Lane  
Wilmslow  
Cheshire  
SK9 5AF

Helpline number: 0303 123 1113

ICO website: <https://www.ico.org.uk>