

*Essentials*



**Holistic Therapists  
Easy Guide**

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## GDPR, what's it all about?

Lots of holistic therapists are worried about GDPR and what it means to their business.

There's talk of huge fines, data protection officers and more.

And who has the time to learn about all this??

The good news is, the GDPR is really all about common sense and courtesy.

More good news is that you're probably already compliant, or nearly compliant.

I will go through what you need to do as a holistic therapist so you have no niggling worries about the new regulations.

1

The GDPR (General Data Protection Regulations) comes into law on 25th May 2018.

It governs the way that clients personal information can be obtained, used and stored.

There is lots more in the new regulation about sensitive data such as financial and criminal records. The regulation also covers steps to be taken if you plan to share the information in non EU countries.

But as this won't apply to holistic therapists I won't include it here.

2

## Showing Consent

You need to be able to show that the clients gave you permission to hold and use their records.

You also need to show that they were fully informed about what you would use the information for.



## Keeping Consultation Forms.

We are bound for legal and insurance purposes to obtain and retain relevant medical information given during a consultation. You may be required to hold the information for up to 6 years depending on the insurance company. To be safe, it's better to keep consultation forms for the full 6 years.

To ensure the best possible treatment, you also need information about the client's lifestyle and what they want to get from the treatment.

However, you need the clients' consent to store the information.

## Contact Details for Marketing.

Keeping in touch with clients and building up a mailing list is an important part of growing a holistic business.

But you need to make it clear to the client why you want this information and get their express consent to use it for marketing purposes.

Apart from the legal aspect, getting consent is common sense. No one likes to receive unsolicited emails or texts, this will in any case alienate clients and do nothing to grow your business.

## Adapting the Consultation Form

My advice is to have an extra page on the consultation form with the following sections:-

"I consent to details of my medical and treatment records being kept safely and securely to meet current GDPR rules."

(Please note I am unable to treat you without your consent.)

"I am happy to receive occasional emails and texts about special offers, new treatments and appointment availability. I understand that I can easily unsubscribe at any time."

(Cross off either email or text if they prefer to be contacted in just one way)

At each section include a Yes and a No checkbox. At the end of the page have a space for the clients' and your own signature.

## Secure Storage

Consultation forms can be physically stored in a locked press where only you have access.

They can also be stored on a computer or in the cloud. In this case any digital device (phone, computer, tablet) must be password protected so no one else has easy access. You must also show that you have taken reasonable care that the device is not lost or stolen.

Any breaches in security when someone else may have gained access to a client's records or contact information must be reported to the Data Protection Commissioner immediately.

## Newsletters

If you have a sign up box on your website or social media, you may need to make some changes.

1. Have a double opt in where an email confirmation is sent before the client is subscribed to your newsletter.
2. If you are offering new subscribers a free gift like an eBook or voucher, they must have the option of getting the free gift without signing up for your newsletter. Otherwise it is considered "forced consent"
3. If you have already had people signing up to receive a free gift, then you must send an email to them asking them if they would like to continue to receive your emails.

Do you need to ask clients who are already subscribed to your email list if they want to continue to receive it?

The simple answer is that if you are already GDPR compliant you do not need to ask for consent.

You are GDPR compliant if:-

- If your subscribers ticked a Yes box on your consultation form.
- If they signed up for your newsletter through your website or social media.
- If it was clearly stated what they would receive e.g. your newsletter with special offers, news, and health tips.
- No "forced" consent such as sign up to get a free gift

## Privacy Policy

On the opt in page, it is a good policy to state that the clients' information will not be shared with any third party.

Also have a link to your [Privacy Policy](#) on your website. It's fine to have this in the footer as long as it can be seen.

Don't stress over the [Privacy Policy](#). Pop over to my [Privacy Policy](#) and feel free to copy and adapt to your own needs.

## Unsubscribing from a mailing list.

You must always give your clients an easy way to unsubscribe from your mailing list. So when you send texts to groups of clients always include "Text stop to opt out"

If you send emails to groups of clients you should use a newsletter software such as mailchimp. This software will give clients an option to unsubscribe with a click.

What if you do need to send a newsletter asking them to confirm their subscription?

\* You can send a specific email asking them if they would like to continue to hear from you.

\* You could include the question in in your normal newsletter.

\* Give the advantages e.g "to continue to receive exclusive subscriber offers, fantastic tips for dealing with stress" etc.

\* You can send the newsletter more than once, until 25th May.

\* If you do send the newsletter or newsletters, however, you have to unsubscribe anyone who hasn't confirmed that they want to continue to hear from you.

## Learn More About Newsletters

To find out more about newsletters, how they can help grow your business and a fantastic (almost) free tool, why not pop over to my blog post:-

**#1 Mistake Holistic Therapists make on Social Media.**

## Getting Consent in Other Ways.

You might have people agreeing to be included in your mailing list by text, email etc.

It is a good idea to keep a log of how you got consent. This could be a simple table with the client's names, how consent was obtained and date.

I suggest keeping emails in a folder marked GDPR, and screenshotting texts and putting them in a Drive folder or in Dropbox.

## Don't Keep Information Unnecessarily.

Once a client unsubscribes from a mailing list, delete their contact information from wherever you have it stored.

So delete numbers from your phone and from any spreadsheet on your computer or in the cloud.

In fact, when you use newsletter software, there is no need to keep clients' contact details on a spreadsheet. That way, when someone unsubscribes, their contact information is automatically deleted.

Consultation forms, however, do need to be kept for up to 6 years, even if the client is no longer receiving marketing information from you.

## Don't Keep Unnecessary Information.

Only request information that you need to have.

For instance asking for someone's postal address when they sign up for a newsletter is not necessary.

## Clients' right to access information you hold about them.

Under GDPR clients have a right to see any information you have about them and to have any relevant information updated.

Information on consultation forms will not need to be updated as the information was correct at the time of the consultation.

They can also request that any information be deleted. You must remove information when requested. This does not apply to consultation forms, as explained earlier.

I hope you found the information helpful  
and straightforward.

If you enjoyed this, you'll love

**My Blog**

where I am building up lots of articles about  
marketing and running your practice.

You can also find me on

**Facebook, YouTube & Pinterest.**

Why not check out my

**Online Holistic Business Course**

which will be released in 2018. This course  
has lots of step by step tutorials about  
online and offline ways to market your  
business plus how to put together a  
marketing plan to help you stay on track.

Jenny xx

## Disclaimer

I don't have legal training but I have checked several reliable sources and the information here, as far as I am aware, is accurate.

However, be aware that, as the regulations are new, there are areas which are unconfirmed as yet.