



Effective from May 2026. Updated 27th May 2026

## **Privacy Notice – SmartPlans product improvement**

This notice is for you if you took part in a care planning meeting that was recorded using Birdie's SmartPlans tool. It covers care recipients, family members or friends who attended, and care agency staff who were present. We have written it with care recipients in mind, but it applies equally to everyone in the room.

If you have any questions, or if you change your mind, please contact us using the details at the end of this notice.

### **Who is Birdie?**

Birdie is a software company. We make tools that help care agencies plan and manage social care.

We usually act on behalf of a care agency. But for the activity described in this notice (improving our SmartPlans tool) Birdie is directly responsible for how your information is used. In legal terms, we are acting as a controller.

### **What is SmartPlans?**

SmartPlans is a tool that helps your care assessor take notes during your care planning meeting.

When your care agency records your meeting, the tool:

- writes up what was said as a transcript
- creates a short summary of the meeting
- suggests things that could be added to your care plan

The aim is to make sure your assessor can give you their full attention, and that nothing important is missed.

## Why do we need your information?

It is very important to us that SmartPlans works well for people with different accents, speech patterns and voices.

To check and improve the tool properly, we need to use real recordings from real meetings.

We need to check that the tool can:

- understand different accents and ways of speaking
- work out correctly who is talking
- write an accurate transcript of what was said
- produce relevant and appropriate suggestions for care plans

To do this, a member of our team will listen to the recording and check the transcript for mistakes. Another person will review the tool's suggestions to make sure they are sensible and appropriate.

We will only use your information for this purpose. We will not use it for anything else.

## What information will we use?

We will use:

- the audio recording of your care planning meeting,
- the pattern of your voice, used to tell speakers apart,
- the written transcript produced by the tool,
- the summary and care plan suggestions produced by the tool.

**All of this is sensitive information.** The audio and transcript will contain personal details about you, your health and your care. Your voice pattern is treated by law as sensitive information. We handle it with great care and only use it in the way described in this notice.

## Your consent

You gave your permission during your care planning meeting. This is called consent.

You can change your mind at any time. To withdraw your consent, please contact us using the details at the end of this notice. We will stop using your information and delete it as soon as we can.

Withdrawing your consent will not affect your care in any way.

## **Who will we share your information with?**

We use a small number of specialist tools to help process the recordings – for example, tools that produce the transcript and the care plan suggestions. These are provided by other companies.

Whenever we use these tools, we make sure:

- they are bound by strict contracts to keep your information safe,
- they will not use your information for their own purposes,
- they will not pass it on to anyone else.

We will not share your information with anyone else or use it for any other purpose.

## **Does your information leave the UK?**

We always try to use tools that are based in the UK or EU. If your information is ever sent outside the UK, we will make sure it is properly protected by law or by contract.

## **How do we keep your information secure?**

We take the security of your information very seriously. We hold internationally recognised security certificates, including ISO 27001 and Cyber Essentials Plus. These require regular independent checks.

Your information is stored on secure systems and is only accessible to staff who need it as part of their job. All staff complete regular security and data protection training and are bound by a confidentiality agreement.

## **How long do we keep your information?**

If we use your information to improve our product, we will keep the audio, transcription and notes for one year. After this time, they will be securely deleted.

## Your rights

You have a number of rights over your information:

- **See your information:** You can ask us for a copy of the information we hold about you, and for an explanation of how we are using it.
- **Correct your information:** If any information we hold about you is wrong or incomplete, you can ask us to correct it.
- **Delete your information:** In certain circumstances, you can ask us to delete the information we hold about you.
- **Pause how we use your information:** You can ask us to temporarily stop using your information while keeping it stored. This might apply if you are waiting for us to correct something, or if you are not sure whether you want us to delete it.
- **Move your information:** In certain circumstances, you can ask us to pass your information to another organisation.
- **Make a complaint to us:** If you are unhappy with how we have handled your information, please contact us. We will investigate and get back to you as quickly as we can.

## How to contact us

If you have questions about this notice, want to withdraw your consent, or want to use any of your rights, please contact our Data Protection Officer:

**Email:** [dpo@birdie.care](mailto:dpo@birdie.care)

**Post:** Birdie Care Services Limited, 3rd Floor, 1 Ashley Road, Altrincham, Cheshire, WA14 2DT

If you need help reading or understanding this notice, please ask a family member, friend or care worker. Or contact us and we will do our best to assist.

## Your right to complain to the regulator

If you are not happy with how we have handled your information, you also have the right to complain to the UK's data protection regulator, the Information Commissioner's Office (ICO).

**Phone:** 0303 123 1113

**Website:** <https://ico.org.uk/make-a-complaint/data-protection-complaints/>

**Email:** [icocasework@ico.org.uk](mailto:icocasework@ico.org.uk)

**Post:** Information Commissioner's Office, Wycliffe House, Water Lane,  
Wilmslow, Cheshire, SK9 5AF