

NCGE / Salespulse Guide on Anonymising Client Data on the AGMS

MAY 2021

National Centre for Guidance in Education



Regarding client data over 7 years old – On the current Adult Guidance Management System it is recommended that services do not delete their clients as this will remove all historical information and statistics from their system. Rather after this period, it is recommended that the local service manually change the client contact information.

Please follow the steps outlined below to anonymise data on the AGMS in cases where a client has not been in touch with a service for 7+ years.

Step 1:

Search and select the client. Print / Review on screen the Client Form Report for that client and review if any activities would identify that client. If there are - then manually adjust that information accordingly.

Focus on the following text fields:

- a. Client Meetings and Related activities fields.
- b. Education Comments field.
- c. Employment Comments field.
- d. Progression notes field.

Step 2:

1. Replace First Name with the word **Anonymised**
2. Replace Surname with the word **Anonymised**
3. Delete Ph (H)
4. Delete Ph (W)
5. Delete Mobile Number
6. Delete Add 1
7. Delete Add 2
8. Delete email
9. Delete Ref code e.g. PPSN (if PPSN information was collected)
10. Untick Active Client

Press the update button.

Step 3:

Once the above has been completed, it is recommended that your service then conduct a final Review of the Client Form Report to ensure that all relevant information is anonymised.

This key client information is then anonymised, but the general profile information and client number remain in the system. This approach should comply with GDPR requirements.

While we understand that the above may be time consuming for services, this process maintains profile information on clients and the numbers of clients in the system for reference.

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NCGE acknowledges the contribution of SalesPulse in the development of this resource.