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Test and Trace

# CUSTOMER LOGGING

## A TOOLKIT FOR BUSINESSES AND ORGANISATIONS

Please note: this guidance  
is for England only.





# CUSTOMER AND VISITOR LOGGING — OVERVIEW

As specific venues start to re-open, we know you want to ensure your staff, customers and visitors are as safe as possible.

We all have a role to play in preventing the spread of coronavirus. Sticking to the national government guidelines including regular hand washing, good respiratory hygiene and social distancing will all help to prevent the spread of coronavirus.

## How can you help?

We need you to help your local communities stay safe from coronavirus by keeping a record of staff, customers, and visitors to your venues.

By keeping a log of customers, staff and visitors, Test and Trace can use this information to get in touch with your venue if an outbreak has been identified.

Customer logging will allow us to help break the chain of transmission and keep infection rates at bay. We want to avoid a second spike at all costs so we don't have to re-introduce lockdown measures.



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# TEST AND TRACE — CONTAINING THE VIRUS

NHS Test and Trace is central to the Government's COVID-19 recovery strategy. It aims to minimise the transmission of COVID-19, contain the spread of the disease and enable people to return to, and maintain, a more normal way of life.

Despite the lifting of lockdown in most areas, the COVID-19 alert level still means that the virus is in general circulation. We need to work together to fight COVID-19 whilst also allowing businesses like yours to reopen and get on the road to recovery.

The problem with COVID-19 is that it thrives where people gather. That's why we've issued guidance to help minimise the risk to the public, and how you can help.



# HOW NHS TEST AND TRACE WILL CONTACT YOU

You'll be contacted by phone.

Text messages will come from NHStracing.  
Calls will come from 0300 0135000.

You'll be asked to sign in to the NHS Test and Trace contact tracing website at <https://contact-tracing.phe.gov.uk>.

If you cannot use the contact tracing website, they will call you.

Please note, local contact tracers may contact you from a different phone number or ask you to call them back. If you are unsure if the telephone number is genuine, check with your local council. More information can be found on your local council website.

## Important

The NHS Test and Trace service will not:

- ask for bank details or payments
- ask for details of any other accounts, such as social media
- ask you to set up a password or PIN number over the phone
- ask you to call a premium rate number, such as those starting 09 or 087



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# MESSAGING

We understand you will want to communicate this to your staff and customers/visitors.

We have compiled messaging for a range of scenarios for you to use;

- Businesses/organisations
- Venue managers (from head office)
- Customers

**We know you'll want to communicate in your own way, so feel free to use this as you see fit, tweaking it to suit your audience and branding. The examples in this document are examples only, which we hope are useful.**

There is further customer logging guidance from the Information Commissioner Office, the regulator to businesses, included in this document.

Please remember you will need to ensure your privacy statements are up-to-date on how you will secure your customers data. A Department of Health and Social Care Privacy notice can be found here, alongside guidance and FAQs on maintaining records:

<https://drive.google.com/file/d/1rtsSgzqhHFAbpupVCjZbkcuUQZJYiRXU/view?usp=sharing>



# EXAMPLE MESSAGING FOR BUSINESSES/ORGANISATIONS

We have developed messaging for you to use in, for example, staff newsletters, start of shift briefings or intranet articles.

As our venues are re-opening, there are important steps all businesses need to take.

We are asking that you take the names and contact details of any customers/visitors who spend time in your premises, and keep these details for 21 days. You will be asked to share this information with NHS Test and Trace if someone who has been on your premises tests positive for coronavirus. This will let our Test and Trace team contact anyone who may have been in the venue at the same time to ask them to get tested.

If contacted by NHS Test and Trace, help them by sharing that information. Doing this will help manage and contain local outbreaks, allowing you to stay open by minimising the risk of reintroducing lockdown measures.

Not only will you be playing your part to keep your local community safe, but you will be contributing to the national effort to control the virus and, ultimately, save lives.

Many businesses will already have systems in place to record customers' details so please continue to use these.

<https://coronavirusresources.phe.gov.uk/Test-and-Trace/resources/customer-logging-toolkit/>



# EXAMPLE MESSAGING FOR VENUE MANAGERS

We have also developed messaging specifically for venue managers to brief venue staff. Again, this messaging could be used in staff briefings, internal emails etc.

Being able to re-open is welcome news but in order for us, and other local businesses, to stay open, it's important that we do what we can to reduce the risk of local outbreaks of coronavirus.

We therefore ask that you record contact details, as well as times of entry and exit for individual customers, or a lead customer for a group spending time on site – note this does not apply where customers are buying food or drinks to consume off the premises. You will need to take a name and either a contact number or email address and store this, securely, for 21 days. If you are asked by NHS Test and Trace you should share this with them as soon as possible. Contact Tracers will work with you on how to do this securely.

Doing this will help manage and contain local outbreaks,

allowing you to stay open by minimising the risk of reintroducing lockdown measures.

Not only will you be playing your part to keep your local community safe but you will be contributing to the national effort to control the virus and, ultimately, save lives.

Please make sure all colleagues are aware of these additional measures and the system you have in place for recording customer details.

It's also important that customers feel confident that their information is being stored securely and will not be shared or used for any other purpose. You will need to give written information to customers if they request this, so we suggest having printed copies available to give or email to customers on request.



# EXAMPLE MESSAGING FOR CUSTOMERS

We're really pleased to be able to re-open and we want to be able to stay open, so we're introducing new measures to help keep everyone safe.

We'll be taking contact details from customers, visitors and staff, plus the times they are on the premises. These will need to be kept for 21 days and, if asked, we will provide them to NHS Test and Trace.

Please be reassured that your information will be stored securely, in line with data protection laws, and will not be shared with anyone else. We will also not use your data for anything else like marketing.

We are doing this to help reduce the risk of any local outbreak – by sharing your information NHS Test and Trace can quickly identify people who have come into contact with someone who has tested positive for COVID-19 and ask them to take the necessary precautions.

We're helping our customers get back to the things they love.



# EXAMPLE MESSAGING FOR VENUE WEBSITES

Please note that in order for us to remain open we will be putting the following measures in place until further notice:

You must make a booking. This allows us to maintain safe distances between customers and to keep track of the number of people in the premises at any one time.

In order to help reduce the risk of a local outbreak of coronavirus, we are taking contact details for customers and visitors, as well as recording times entering and leaving our premises.

In line with guidance issued by the Department for Health and Social Care, we will keep your details for 21 days. We will share them with Test and Trace personnel, if asked, in the event of a fellow customer or staff member testing positive for coronavirus.

Data will be handled according to GDPR, security and ethical standards at every stage of the process – from its collection and storage by us and if needed, to its transfer and use by NHS Test and Trace. NHS Test and Trace will handle all data according to the highest ethical and security standards and it will be used only for NHS care, management, evaluation and research.

**Please note the booking policy is not in government guidance. This is for your venue to decide, we are simply giving an example.**



# EXAMPLE MESSAGING FOR POSTERS AT VENUE ENTRANCES

## Short text

Helping our customers and visitors get back to the things they love.

All customers will be asked to provide contact details on entry to help us reduce the risk of a local outbreak of coronavirus and stay open.

## Long version (where able to display)

Helping our customers get back to the things they love.

In order to help reduce the risk of a local outbreak of coronavirus we are taking contact details of customers and visitors, as well as recording times entering and leaving our premises.

In line with guidance issued by the government, we will keep your details for 21 days. We will only share them with NHS Test and Trace, if asked, in the event of a potential outbreak at your venue.

Please help us keep our customers, staff and the wider community safe by cooperating.

Thank you for your understanding.



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# RESOURCES TO HELP YOU INFORM CUSTOMERS

We have developed a suite of resources to help you promote the message.

- A4 posters (image led and easy print versions) for you to print and display in your venues or use on digital screens
- Digital and social media resources for use on your website, customers newsletters and booking confirmations and to share on your social media channels.

All resources are now available on the link below.

<https://coronavirusresources.phe.gov.uk/Test-and-Trace/resources/customer-logging-toolkit/>



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# GUIDANCE FROM THE INFORMATION COMMISSIONER OFFICE

The below guidance has been issued by the regulator to businesses and organisations in regards to customer logging.

## Protecting customer and visitor details

We understand that organisations have lots of new measures to put in place so that they can re-open safely to the public. For many, this includes collecting customers' and visitors' personal information for the first time, to support the NHS Test and Trace schemes in the UK.

It doesn't need to be complicated – there's no need for you to develop special apps or digital solutions – just choose the process that best suits your business.

Follow our five simple steps to help ensure that data protection is not a barrier to your recovery.

This guidance continues over the next two pages.



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# GUIDANCE — CONTINUED

## Ask for only what's needed

You should only ask people for the specific information that has been set out in government guidance. This may include their name, contact details and the date and time of their arrival.

You should not ask people to prove their details with identity verification, unless this is a standard practice for your business, e.g. ID checks for age verification in pubs.

## Be transparent with customers

You should be clear, open and honest with people about what you are doing with their personal information. Tell them why you need it and what you'll do with it. You could do this by displaying a notice in your premises, including it on your website or even just telling people.

If you already collect customer data for bookings, you should make it clear that their personal data may also be used for NHS Test & Trace.



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# GUIDANCE — CONTINUED

## Carefully store the data

You must look after the personal data you collect. That means keeping it secure on a device if you're collecting the records digitally or, for paper records, keeping the information locked away.

## Don't use it for other purposes

You cannot use the personal information that you collect for NHS Test & Trace for other purposes, such as direct marketing, profiling or data analytics.

## Erase it in line with government guidance

You should not keep the personal data for longer than the government guidelines specify. It's important that you dispose of the data securely to reduce the risk of someone else accessing the data. Shred paper documents and permanently delete digital files from your recycle bin or back-up cloud storage, for example.



## CUSTOMER Q&A

**Q.** Can I come in if I don't want to give you my details?

**A.** Although this is voluntary, we're encouraging customers and visitors to share their details in order to support NHS Test and Trace. Your information will only be used where necessary to help stop the spread of COVID-19. You can opt out.

**Q.** What will you do with the data?

**A.** In line with guidance issued by the government, we will keep your details for 21 days. We will only share them with NHS Test and Trace, if asked, in the event of a potential outbreak linked to the venue. After 21 days we will delete/destroy your details. It will not be used for marketing or other purposes.

**Q.** Why are you doing this?

**A.** We are doing this to help reduce the risk of a local outbreak of coronavirus and in line with government guidance. We want to do everything we can to protect our staff, customers/visitors and the wider community.

**Q.** I don't trust you to keep my data secure

**A.** All businesses that take personal information must comply with relevant data protection law. We have provided information [your venue link] about how we will keep your data secure.



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# COMING SOON

## QR Posters for Customer Logging via the NHS Test & Trace App

We understand the pressures on your business because of Covid. We all want to get back to the things we love in a safe way and customer logging has been vital to this.

We'll soon be launching the NHS Test & Trace App. Built into this will be a QR code scanner which will mean customers and visitors to your venues can immediately check-in to your venue.

You will be able to easily generate and print official NHS Test and Trace QR posters for your venue, and we will be in touch in the coming weeks with further information. For a sneak peak of how the app and the QR posters will work, here's a [demo video](#).

To note, you'll still need to have your customer logging process to-hand in case someone doesn't have the app or a smartphone.



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**This messaging was issued on 19th August 2020.**

For further information or questions please email;

[TTDHSCexternalaffairs@dhsc.gov.uk](mailto:TTDHSCexternalaffairs@dhsc.gov.uk)

**We produce a weekly newsletter on NHS Test and Trace.**

You can sign up to receive this by emailing;

[TTDHSCexternalaffairs@dhsc.gov.uk](mailto:TTDHSCexternalaffairs@dhsc.gov.uk)