SCO-023a

Customer Privacy Policy – Solar PV and Battery Storage Installation.

1. Introduction

Scope Utility Solutions Ltd is committed to protecting the privacy, confidentiality and security of the personal information of customers who enquire about, purchase or receive solar photovoltaic (PV) panels, battery storage systems, inverters and associated products and services.

This Privacy Policy explains how we collect, use, store, protect and share your personal information throughout the customer journey, from your initial enquiry and property survey through to installation, commissioning, aftercare, warranties and any associated finance arrangements.

We process personal information in accordance with applicable UK data protection legislation, including the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018, as amended.

We aim to ensure that all personal information is handled lawfully, fairly, transparently and securely, and that customers understand their rights in relation to the information we hold about them.

2. Who is responsible for your personal information?

Scope Utility Solutions Ltd is responsible for the personal information we process as a data controller.

Where we work with a finance provider, lead-generation company, installation partner or other organisation, that organisation may also process your information as an independent data controller or, where applicable, as a data processor acting on our instructions.

Where another organisation is responsible for its own processing activities, its privacy policy may also apply.

Our contact details

Scope Utility Solutions Ltd
Registered Office - Unit 6 Princes Park, Princes Way North, Gateshead, Tyne and Wear, NE11 0NF.
Telephone – 0191 5807850
Email - Info@scopeutilitysolutions.co.uk
Data protection enquiries – Data@scopeutilitysolutions.co.uk

Warning: This document may be out of date if printed

3. What information do we collect?

The information we collect will depend on the products and services you enquire about or purchase and the arrangements applicable to your installation.

3.1 Personal and contact information

We may collect:

- Your name and title.
- Home and correspondence address.
- Telephone number and email address.
- Preferred contact method and appointment availability.
- Customer reference numbers and relevant contract details.

3.2 Property and installation information

To assess the suitability of your property and deliver your installation, we may collect:

- Property address and relevant property characteristics.
- Roof dimensions, orientation, condition and suitability information.
- Photographs of your roof, property, meter, consumer unit and proposed equipment locations.
- Survey reports, site assessments and installation specifications.
- Information about your existing electrical installation and energy arrangements.
- Electricity meter details, energy consumption information and relevant energy bills, where required.
- Electrical certificates, commissioning records, system settings and installation documentation.
- Information needed for applicable distribution network notifications or approvals.
- Details required for applicable certification, warranty, grant or incentive processes.
  Photographs and survey records will be collected and used for legitimate installation, safety, technical, quality assurance and evidential purposes. We will take reasonable steps to avoid collecting images or information that are unnecessary for those purposes.

3.3 Financial and payment information

Where relevant to your purchase, we may collect or process:

- Quotation values, contract prices and agreed payment schedules.
- Deposit payments, invoices, receipts, outstanding balances and refunds.
- Bank account details where required for an authorised payment or refund.
- Payment transaction references and confirmation of payment.
- Information relating to a finance application where it is necessary and lawfully made available to us.
- Records needed to investigate payment disputes, suspected fraud or financial discrepancies.
  Where you choose to finance your solar PV or battery installation, the finance provider will generally be responsible for collecting and assessing the detailed financial information required for its application and lending decisions.

This may include income, employment, expenditure, existing financial commitments, credit history and identity-verification information. Scope will only collect or receive such information where it is necessary for our role and there is an appropriate lawful basis.
We do not undertake credit checks or make lending decisions on behalf of a finance provider unless we are specifically authorised and legally entitled to perform that activity.
You should refer to the relevant finance provider's privacy notice for information about its credit checks, affordability assessments, credit reference agency searches, financial decision-making and retention of application records.

3.4 Communications and customer service information

We may retain:

- Emails, telephone correspondence and messages.
- Records of quotations, contract discussions and customer instructions.
- Survey appointments and installation scheduling information.
- Customer feedback, complaints and their resolution.
- Records of defects, remedial work, warranty claims and aftercare enquiries.
- Quality assurance, audit and health and safety records relevant to your installation.

3.5 Technical and system information

Where a solar PV or battery system includes remote monitoring or connected equipment, relevant technical information may be collected by Scope, the equipment manufacturer or the monitoring service provider.

This may include system performance, electricity generation, battery charging and discharging, fault notifications and equipment status.

Where energy usage or system data relates to an identifiable household or individual, it may constitute personal information. We will handle such information in accordance with applicable data protection requirements.

4. Why do we use your information?

We use your personal information only where we have an appropriate lawful basis and for purposes connected with our business activities.

These purposes may include:

Enquiries and quotations

- Responding to your enquiry.
- Arranging appointments and surveys.
- Preparing quotations and assessing property suitability.
- Explaining available products, installation options and associated services.

Contract administration

- Preparing and administering your installation contract.
- Confirming agreed specifications, prices and payment arrangements.
- Communicating with you about the progress of your installation.
- Managing cancellations, changes and contractual queries

Installation and technical compliance

- Planning and carrying out your installation.
- Arranging access to your property.
- Maintaining installation, commissioning and electrical safety records.
- Completing applicable certification, notifications and approvals.
- Providing documentation required for warranties, guarantees and relevant industry schemes.

Payments and finance

- Processing authorised payments and refunds.
- Maintaining financial and accounting records.
- Communicating with finance providers where necessary and authorised.
- Administering relevant finance arrangements within the scope of our role.

Aftercare and warranties

- Providing customer support and responding to defects.
- Investigating complaints and warranty claims.
- Arranging inspections, repairs or remedial work.
- Supporting manufacturer or installer warranty processes.

Legal and business requirements

- Meeting applicable legal, regulatory and contractual obligations.
- Preventing and investigating fraud.
- Maintaining appropriate insurance and audit records.
- Establishing, exercising or defending legal claims.
- Improving our services and monitoring installation quality.

5. Our lawful basis for processing your information

Under the UK GDPR, we must have a lawful basis for processing personal information.

Depending on the circumstances, we may rely on the following:

Contractual necessity: To take steps at your request before entering into a contract and to perform our contract with you, including arranging surveys, installations, payments and aftercare.

Legal obligation: To meet applicable legal, tax, accounting, electrical safety, regulatory and record-keeping requirements.

Legitimate interests: To manage our business, maintain quality and safety standards, prevent fraud, investigate complaints and protect our legal interests, where these interests are not overridden by your rights and freedoms.

Consent: Where consent is the appropriate basis, such as for certain marketing communications or optional uses of information, we will explain what you are consenting to. You may withdraw consent at any time.

Other lawful grounds: Where applicable, we may rely on another lawful basis permitted by data protection legislation.

We will not assume that consent is required for every activity or use consent as a substitute for another lawful basis where that other basis is more appropriate.

6. How we handle your financial information

We understand that financial information is confidential and that unauthorised access or disclosure may expose customers to financial loss or fraud.

Scope will apply appropriate technical and organisational security measures to protect financial information throughout the customer relationship.

These measures may include:

- Restricting access to authorised personnel who need the information to perform their duties.
- Using appropriate password protection, access controls and authentication.
- Storing records securely and using appropriate safeguards when transferring information.
- Maintaining procedures for verifying payment instructions and handling refunds.
- Providing staff with appropriate confidentiality and data protection guidance.
- Using suitable contractual and security safeguards when working with external service providers.
- Investigating suspected fraud, unauthorised access or data breaches.
  Customers should not send passwords, card security codes or other unnecessary sensitive payment credentials to Scope by ordinary email.

  Where payments are processed through an external payment provider, that provider may handle payment information under its own arrangements and privacy notice.

7. Finance applications and third-party finance providers

If you choose to fund your solar PV or battery installation through a finance arrangement, your personal information may be shared with the relevant finance provider or authorised finance intermediary where necessary and lawful.

The information shared may include your name, contact details, property or installation details, quotation amount, proposed purchase and other information reasonably required to progress the transaction.

Scope will only share financial or application information that is necessary for our role and supported by an appropriate lawful basis.

The finance provider may independently assess your application, carry out identity and affordability checks, consult credit reference agencies, make lending decisions and retain records in accordance with its own legal obligations and privacy policy.

The finance provider is responsible for explaining its own processing activities and the rights available to you in relation to the information it controls.

Where Scope acts as an appointed representative, credit broker, intermediary or in another regulated capacity, our responsibilities and disclosures will reflect the actual permissions, agreements and role applicable to the arrangement.

8. Who may we share your information with?

We may share relevant personal information with the following organisations where necessary for the purposes described in this policy:

- Solar PV and battery installation partners and subcontractors.
- Finance providers and authorised finance intermediaries.
- Equipment manufacturers, distributors and suppliers.
- Warranty providers and service or maintenance partners.
- Certification bodies and relevant industry schemes, including MCS where applicable.
- Distribution network operators and other relevant utility organisations.
- Payment providers, banks and financial institutions.
- IT, hosting, customer relationship management and document storage providers.
- Accountants, auditors, insurers, legal advisers and other professional advisers.
- Regulators, law enforcement agencies, courts and public authorities where required or legally permitted.
- Other parties where disclosure is necessary to establish, exercise or defend legal claims.

We will take reasonable steps to ensure that information shared is relevant and proportionate to the purpose.

Where an organisation processes information on our behalf, we will put appropriate contractual arrangements in place. Where an organisation acts as an independent data controller, it will be responsible for its own processing activities.

We do not sell customer personal information.

9. Marketing and customer communications

We may contact you to administer your enquiry or contract, arrange surveys and installations, provide safety information, respond to queries, administer warranties or deliver aftercare services.

These service communications are distinct from promotional marketing.

We may also wish to contact customers about other products, services or offers. Where we do so, we will comply with applicable data protection and electronic marketing rules.

Where consent is required for marketing by email, text message or other electronic means, we will obtain the appropriate consent before sending such communications.

You can opt out of marketing communications at any time by using the unsubscribe facility where available or contacting us directly.

You have an absolute right to object to the use of your personal information for direct marketing. We will stop processing it for that purpose when you exercise this right.

Opting out of marketing will not affect necessary communications relating to an existing contract, installation, warranty or legal obligation.

10. Cookies and website information

If you visit our website, we may collect technical information such as your IP address, browser type, device information and website usage data.

Our website may use cookies and similar technologies to operate effectively, remember preferences, analyse website performance or support marketing activities.

Where consent is required for cookies or similar technologies, we will seek consent and provide information about how you can manage your preferences.

Further information will be provided in our website cookie notice, where applicable.

11. How we protect your information

We implement appropriate security measures designed to protect personal information against accidental loss, destruction, alteration, unauthorised access or disclosure.

These measures may include access restrictions, secure storage, staff training, supplier controls and procedures for managing security incidents.

No method of electronic transmission or storage can be guaranteed to be completely secure. However, we will take reasonable and proportionate steps to protect the information entrusted to us.

If a personal data breach occurs, we will investigate it, take appropriate remedial action and notify the ICO and affected individuals where required by law.

12. How long we retain your information

We retain personal information only for as long as reasonably necessary for the purposes for which it was collected, taking account of legal requirements, contractual obligations, warranty periods, potential disputes and legitimate business needs.

Different categories of information may be retained for different periods.

For example:

- Enquiry and quotation records may be retained for a defined period after the enquiry or quotation ends.
- Contract, installation and commissioning records may be retained for the period necessary to administer the contract, meet applicable requirements and deal with potential claims.
- Financial and accounting records may need to be retained to meet statutory tax and accounting obligations.
- Warranty and aftercare records may be retained for the relevant warranty period and any further justified period.
- Complaints, insurance and dispute records may be retained for as long as reasonably necessary to investigate and resolve the matter and deal with potential legal claims.

We will document appropriate retention periods and review records periodically. When information is no longer required, it will be securely deleted, destroyed or anonymised unless there is a lawful reason to retain it.

Finance providers and other independent controllers may retain information under their own retention policies.

13. Transfers of information outside the UK

Where personal information is transferred outside the United Kingdom, we will ensure that the transfer complies with applicable data protection legislation.

Depending on the circumstances, this may involve an adequacy decision, appropriate contractual safeguards or another legally permitted transfer mechanism.

Further details about relevant safeguards will be provided where required.

14. Your data protection rights

Under applicable data protection legislation, you may have the following rights in relation to your personal information:

Right to be informed: To understand how your information is collected and used.

Right of access: To request a copy of the personal information we hold about you.

Right to rectification: To request correction of inaccurate or incomplete information.

Right to erasure: To request deletion of your information in certain circumstances.

Right to restriction: To request that we restrict processing in certain circumstances.

Right to data portability: To receive certain information in a structured, commonly used and machine-readable format, where the legal conditions apply.

Right to object: To object to certain processing, including processing based on legitimate interests. You have an absolute right to object to direct marketing.

Rights relating to automated decisions: To exercise applicable rights where decisions are made solely by automated processing and have legal or similarly significant effects.

Right to withdraw consent: Where we rely on your consent, you may withdraw it at any time.

These rights are subject to applicable legal conditions and exemptions. For example, we may need to retain certain financial or contractual records to comply with legal obligations even if you request their deletion.

To exercise your rights, please contact us using the details in Section 2. We may need to verify your identity before responding.

We will respond without undue delay and normally within one month. Where the law permits an extension, we will explain this within the applicable timeframe.

Requests are generally handled free of charge, although the law permits a reasonable fee or refusal in certain circumstances.

Where your information is held by a finance provider or another independent data controller, you may need to contact that organisation directly to exercise your rights in relation to its records.

15. Complaints about the handling of your personal information

If you are concerned about how Scope has collected, used, stored or disclosed your personal information, we encourage you to contact us so that we can investigate and seek to resolve the matter.

Please contact:

Data Protection Complaints

Scope Utility Solutions Ltd
Registered Office - Unit 6 Princes Park, Princes Way North, Gateshead, Tyne and Wear, NE11 0NF.
Telephone – 0191 5807850
Email - Info@scopeutilitysolutions.co.uk

Please provide details of your concern and, where possible, the relevant customer reference or installation address.

We will record and investigate your complaint, take appropriate action where necessary and explain our findings.

We will aim to acknowledge complaints promptly and provide a response without undue delay.

Your right to complain to the Information Commissioner's Office (ICO)

You have the right to complain directly to the **Information Commissioner's Office (ICO)** if you believe your personal information has been handled unlawfully or your data protection rights have not been respected.

You may contact the ICO whether or not you have first complained to Scope. We encourage customers to give us an opportunity to investigate where appropriate, but this does not restrict your right to contact the regulator.

Information Commissioner's Office (ICO)

Website: https://ico.org.uk/

Telephone: 0303 123 1113

Postal address:

Information Commissioner's OfficeWycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF

The ICO can provide guidance on your data protection rights and consider complaints about the handling of personal information.

16. Changes to this Privacy Policy

We may update this policy from time to time to reflect changes in legislation, regulatory guidance, our services or the way we process personal information.

The latest version will be made available through our website or other appropriate customer communication channels.

Where required, we will provide further information about material changes to the way your personal information is used.

17. Contact us

If you have any questions about this policy, wish to exercise your data protection rights or want to raise a concern about the handling of your information, please contact Scope Utility Solutions Ltd using the details in Section 2.

Scope Utility Solutions Ltd is committed to protecting the personal and financial information of its solar PV and battery storage customers and to treating every customer fairly, transparently and respectfully.