



Privacy Notice

CBT with Jo

Effective date: 9 August 2026

Last updated: 9 August 2026

1. About this Privacy Notice

Your privacy is important to me. This Privacy Notice explains how **CBT with Jo** collects, uses, stores and protects your personal information when you contact me, use my services or visit my website.

CBT with Jo is a private therapy practice providing CBT and related psychological therapy services.

For the purposes of UK data protection legislation, **I am the data controller** responsible for your personal information.

If you have any questions about how your information is handled, you can contact me at:

Email: jo@cbtwithjo.co.uk

This Privacy Notice should be read alongside my Therapy Contract and other information provided to you during the therapy process.

2. What information I collect

Depending on how you interact with CBT with Jo, I may collect and use information including:

Website and enquiry information

When you contact me through my website, this may include:

- your first and last name;
- email address;
- telephone number; and
- information you choose to include in your message.

Please avoid including detailed medical, mental health or other sensitive information in the website contact form. A brief outline of what you would like support with is sufficient at this stage.

Information collected during therapy



If you become a client, I may collect information necessary to provide safe and appropriate therapy, including:

- contact and demographic information;
- onboarding information;
- information contained in the Therapy Contract;
- assessment information;
- information relating to your mental and physical health;
- relevant personal and social history;
- formulation and treatment-planning information;
- clinical session notes;
- outcome measures;
- risk and safeguarding information;
- safety plans;
- correspondence relevant to your treatment;
- referral or signposting information; and
- discharge information.

Health and therapy information is considered **special category data** under UK data protection law and is handled with additional safeguards.

Payment and insurance information

For self-funded therapy, I may record:

- your name;
- payments received;
- dates and amounts of payments;
- invoices or receipts; and
- information about outstanding payments.

Payments are currently made by **BACS**. I do not require clients to provide me with their personal bank account details.

Where therapy is funded or supported by an insurer, I may process relevant information such as authorisation details, approved session numbers, invoices and other information necessary to administer the arrangement.

3. How I use your information

I use personal information where necessary to:

- respond to enquiries;
- arrange consultations and appointments;
- provide CBT and other agreed therapy services;
- assess your needs and develop an appropriate treatment plan;
- maintain accurate clinical records;
- monitor progress and outcomes;
- manage risk and safeguarding;
- communicate with you about your therapy;
- communicate with GPs, healthcare professionals, other therapists or services where appropriate;
- communicate with insurers where necessary;
- provide referrals or signposting;
- manage payments and practice administration;
- maintain appropriate professional and clinical governance;
- undertake professional or clinical supervision;
- comply with legal, professional and regulatory obligations; and
- protect the safety and wellbeing of clients and others where necessary.

I only use your information for purposes that are relevant to the operation and provision of CBT with Jo.

4. Lawful basis for using your information

UK data protection law requires me to have a lawful basis for processing personal information.

Ordinary personal information

For information such as your name, contact details and appointment information, I may rely on processing being necessary to:

- take steps at your request before entering into a therapy contract; and/or



- perform the contract for therapy services.

I may also process information where necessary to comply with legal obligations or where another lawful basis applies.

Health and other special category information

Health and therapy information is special category data and requires an additional legal condition for processing.

Where necessary for the provision of therapy and healthcare services, I rely on the applicable health or social care condition under **Article 9(2)(h) UK GDPR**, together with an appropriate Article 6 lawful basis.

Article 9(2)(h) permits processing where necessary for the provision of health or social care or treatment, subject to the conditions and safeguards required by law.

Where I rely on consent for a particular activity, such as recording a therapy session for supervision, that consent will be obtained separately. Withdrawal of that consent will apply to future recording.

5. Confidentiality and information sharing

Information you share during therapy is treated as confidential.

I will generally only share information:

- with your consent;
- where there is a legal or professional requirement to do so; or
- where sharing is necessary to manage serious risk, safeguarding concerns or to protect you or another person.

Where appropriate, I may communicate with:

- your GP;
- other healthcare professionals;
- other therapists or services;
- insurers;
- safeguarding services; and
- emergency or crisis services.

Where information is shared routinely, I will normally seek your consent first and will share only the information necessary for the purpose.



There may be circumstances where information needs to be shared without your consent, for example where there is a serious concern about safety or a legal or professional obligation to disclose information.

Relevant information-sharing decisions will be documented in your clinical record.

The limits of confidentiality are explained during onboarding and assessment and may be revisited where relevant during therapy.

6. Clinical records

Your clinical record may include your onboarding information, Therapy Contract, assessment, formulation, treatment plans and goals, clinical notes, outcome measures, risk assessments, safety plans, relevant correspondence, referrals or signposting and discharge information.

Your clinical records are maintained electronically.

Zanda Health is the primary practice management and clinical record system used by CBT with Jo. It is used for functions including client onboarding, appointments, clinical records, outcome measures, risk information, safety plans, documents, payments and the client portal.

Zanda acts as a data processor for information processed on behalf of the practice. Client information for CBT with Jo is handled within Zanda's **United Kingdom data region**.

Zanda provides security measures including encryption, access controls and encrypted backups. A Global Data Processing Agreement is in place between Zanda and its customers.

Access to your clinical records is restricted to me, apart from authorised service providers where access is necessary to provide or support the systems used by the practice.

7. Email and electronic communication

I use **Microsoft 365** for practice email.

Email may be used for:

- responding to enquiries;
- appointment arrangements;
- cancellations and rearrangements;



- safety plans;
- therapy-related information and documents;
- communication with GPs and other professionals;
- communication with insurers; and
- other appropriate clinical or administrative communication.

Clients may sometimes send health or therapy-related information by email even where this has not specifically been requested.

Relevant information from emails may be transferred to the clinical record in Zanda and emails may then be deleted where appropriate.

I take reasonable steps to protect information held within my practice email account, including password protection and multi-factor authentication.

Email is **not an appropriate method for urgent or emergency clinical support**.

8. Online therapy

Online therapy is provided using the video consultation functionality integrated with **Zanda Health**, which uses Zoom technology.

Online therapy sessions are not automatically recorded.

For online sessions, you may be asked to confirm your current location where this is clinically necessary for safety or risk management.

I maintain a private environment for online sessions and ask clients to do the same.

9. Recording of therapy sessions

Therapy sessions may occasionally be recorded where this is clinically or professionally useful for supervision.

Recording will only take place after you have provided **separate informed consent**.

Recording is voluntary and declining to be recorded will not affect your access to therapy.

You may withdraw consent to future recording at any time.

Recordings:

- are not part of your clinical record;



- are accessed only by me and my clinical supervisor where required for supervision;
- are stored securely on my encrypted device; and
- are securely destroyed when my work with you ends.

Recordings are used to support safe, effective and reflective clinical practice through professional supervision.

My clinical supervisor is a **BABCP-accredited therapist and accredited senior therapist** and is subject to appropriate professional and confidentiality obligations.

You may also record a therapy session where this has been discussed and agreed in advance. If you choose to make your own recording, you are responsible for keeping it secure and preventing unauthorised access.

10. Communication with other professionals

Where clinically appropriate, I may communicate with your GP or other healthcare professionals, therapists or services involved in your care.

I will normally obtain your consent before routine communication takes place.

Communication may take place by email, telephone, letter or another appropriate method depending on the circumstances.

Only the information necessary for the relevant purpose will normally be shared rather than your complete clinical record.

Where relevant, professional correspondence or communication will be documented in your Zanda clinical record.

In circumstances involving serious risk, safeguarding or another legal or professional requirement, information may need to be shared without your consent.

11. Payments and insurers

Self-funded therapy payments are currently made by BACS.

Payment information is recorded in Zanda and through my practice bank account as necessary for financial administration.

Where you use health insurance to fund therapy, I may communicate with your insurer regarding matters such as authorisation, approved sessions, invoices or other information required to administer your treatment.



Relevant insurer information may be recorded within your Zanda client record, for example an authorisation number or the number of sessions approved.

12. Third-party service providers

CBT with Jo uses trusted third-party service providers to operate the practice and provide services to clients.

These may include:

- **Wix** — website hosting and website functionality;
- **Usercentrics** — cookie consent management;
- **Zanda Health** — practice management, clinical records, client portal and online therapy functionality;
- **Microsoft 365** — practice email and associated services;
- **Zoom** — video consultation technology provided through Zanda;
- banking and financial service providers; and
- other service providers where necessary to operate the practice.

These providers may process personal information on behalf of CBT with Jo or as otherwise described in their own privacy arrangements.

Appropriate steps are taken to ensure that information is handled in accordance with applicable data protection requirements.

13. International clients and data transfers

CBT with Jo may provide therapy to clients located outside the UK.

Where personal information is processed or transferred internationally, I will consider the applicable data protection requirements and use appropriate safeguards where required.

Some third-party service providers used by the practice may process information outside the UK. Where this occurs, the relevant provider's data protection arrangements and applicable transfer safeguards will apply.

14. Website, cookies and tracking

The CBT with Jo website is hosted through Wix and uses cookies and similar technologies to support website functionality, security and performance.



The website uses a cookie consent mechanism provided through **Usercentrics**, which allows visitors to manage their preferences regarding cookies and similar technologies.

At present, CBT with Jo does not have third-party advertising or marketing tracking tools such as Google Analytics, Meta Pixel, TikTok Pixel or Google Ads connected to the website.

If the use of cookies, analytics or other tracking technologies changes in a way that affects how personal information is processed, this Privacy Notice will be reviewed and updated.

15. Website enquiries

When you submit an enquiry through the CBT with Jo website, your information is received through Wix and email.

I use this information to respond to your enquiry and, where appropriate, arrange a **free 15-minute consultation**.

If you decide not to proceed with therapy, your enquiry information will normally be deleted once the enquiry or consultation has concluded and it is clear that you are not proceeding.

If you become a client, relevant information will be transferred into the appropriate practice systems as necessary.

Please avoid providing detailed medical, mental health or other sensitive information through the website contact form.

16. Marketing and social media

CBT with Jo uses social media, including Instagram, to share general educational and marketing content.

I do not use social media direct messages as a method of providing therapy or routinely collect or store client information through social media.

Clients should not use social media to contact me about their therapy or clinical needs.

I do not currently send marketing or newsletter emails. If this changes in the future, I will provide appropriate information and obtain consent where required by law.

I do not currently use photographs, videos, screenshots or other identifiable client-related content for marketing.



If I were to use an anonymised testimonial or other client-related content for marketing in the future, appropriate consent would be obtained before publication.

17. How I keep your information secure

I take reasonable and appropriate steps to protect personal information against unauthorised access, loss, misuse, alteration or disclosure.

This includes measures such as:

- using secure practice systems;
- restricting access to client information;
- using password-protected devices;
- using multi-factor authentication for Microsoft 365;
- using Zanda's security and backup arrangements;
- securely storing session recordings on an encrypted device; and
- securely deleting information when the applicable retention period ends.

No electronic system can be guaranteed to be completely secure, but I take appropriate steps to reduce the risks associated with handling personal information.

18. Data breaches and loss of information

If I become aware of a data breach, loss, accidental disclosure or unauthorised access involving personal information, I will take appropriate steps to:

- contain the incident where possible;
 - assess the nature and potential impact of the breach;
 - document the incident;
 - take appropriate remedial action;
 - notify individuals, the ICO or other relevant parties where legally required; and
 - review processes where appropriate to reduce the likelihood of recurrence.
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19. How long I keep your information



I do not keep personal information for longer than is necessary for the purposes for which it is processed, subject to legal, professional, insurance and other legitimate requirements.

Clinical records

Clinical records will normally be retained for **seven years from the date of your last therapy session**, unless a longer retention period is required or justified by the circumstances.

Website enquiries

Where an enquiry does not result in therapy, enquiry information will normally be deleted once the enquiry or consultation has concluded and it is clear that you are not proceeding.

Session recordings

Session recordings made for supervision are not part of the clinical record and will be securely destroyed when my work with you ends.

Financial information

Financial and accounting information will be retained for as long as required to meet applicable legal and accounting obligations.

When information reaches the end of its applicable retention period, it will be securely deleted or otherwise securely disposed of, subject to any information that must legally be retained.

20. Your rights

Depending on the circumstances and subject to applicable legal exemptions, you may have rights in relation to your personal information, including the right to:

- request access to the personal information I hold about you;
- request correction of inaccurate or incomplete information;
- request deletion of information in certain circumstances;
- request restriction of processing in certain circumstances;
- object to certain processing;
- request data portability where applicable; and
- withdraw consent where processing is based on consent.

Some of these rights are subject to legal conditions and exemptions, particularly in relation to clinical records.



If you would like to exercise one of these rights, or simply want to understand more about how your information is being used, please contact me at jo@cbtwithjo.co.uk.

21. Complaints about how your information is handled

If you have a concern about how I have handled your personal information, I would encourage you to contact me first so that I have an opportunity to understand and address your concern.

You also have the right to complain to the **Information Commissioner's Office (ICO)** if you remain concerned about how your personal information has been handled.

Further information about the ICO and how to make a complaint is available from the ICO website.

22. Keeping your information accurate

I aim to keep the personal information I hold about you accurate and up to date.

I may ask you to confirm or update your information where this is necessary, particularly where changes could affect your care, communication or safety.

You can also contact me if you believe information I hold about you is inaccurate or needs updating.

23. Changes to this Privacy Notice

This Privacy Notice may be updated from time to time to reflect:

- changes to CBT with Jo;
- changes to the systems or service providers I use;
- changes in how personal information is processed;
- changes to legal or professional requirements; or
- changes to relevant data protection guidance.

I will review this Privacy Notice periodically and when there are significant changes to my practice, systems, service providers or data protection requirements.

The effective date and last updated date will be shown at the beginning of this Privacy Notice.



Contact

If you have any questions about this Privacy Notice or how CBT with Jo handles your personal information, please contact:

Jo

CBT with Jo

jo@cbtwithjo.co.uk