

Privacy Notice

At Citizens Advice New Forest we collect and use your personal information to help solve your problems, improve our services and tackle wider issues in society that affect people's lives.

We only ask for the information we need. We always let you decide what you're comfortable telling us, explain why we need it and treat it as confidential.

When we record and use your personal information we:

- only access it when we have a good reason
- only share what is necessary and relevant
- don't sell it to anyone

We handle and store your personal information in line with the law.

Who's responsible for keeping your personal information safe

The national Citizens Advice charity and Citizens Advice New Forest are both responsible for keeping your personal information safe and making sure we comply with data protection law. This means we're a 'joint data controller' for your personal information.

Citizens Advice New Forest is an independent charity, and a member of the national Citizens Advice charity.

At times we might use or share your information without your permission. If we do, we'll always make sure there's a legal basis for it. This could include situations where we have to use or share your information:

- to comply with the law - for example, if a court orders us to share information. This is called 'legal obligation'
- to protect someone's life - for example, sharing information with a paramedic if a client was unwell at our office. This is called 'vital interests'
- to carry out our legitimate aims and goals as a charity - for example, to create statistics for our national research. This is called 'legitimate interests'
- for us to carry out a task where we're meeting the aims of a public body in the public interest - for example, delivering a government or local authority service. This is called 'public task'



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- to carry out a contract we have with you - for example, if you're an employee we might need to store your bank details so we can pay you. This is called 'contract'
- to defend our legal rights - for example, sharing information with our legal advisors if there was a complaint that we gave the wrong advice.

At Citizens Advice New Forest we mainly use 'Contract' for our dealings with clients.

We handle and store your personal information in line with the law - including the General Data Protection Regulation and Data Protection Act 2018.

You can check the National Citizens Advice policy (<https://www.citizensadvice.org.uk/about-us/citizens-advice-privacy-policy/>) for how we handle most of your personal information.

This policy covers how we, as Citizens Advice New Forest, handle your information locally.

How Citizens Advice New Forest collect your data

When you get advice from an adviser

We'll get your permission by asking you to either:

- sign a paper consent form
- tick a box online
- give agreement over the phone

Before we ask for your permission, we'll always explain how we use your information.

What information we ask for

We'll only ask for information that's relevant to your problem. Depending on what you want help with, this might include:

- your name and contact details - so we can keep in touch with you about your case
- personal information - for example about family, work, or financial circumstances
- details about services you get that are causing you problems - like energy or post
- details of items or services you've bought, and traders you've dealt with
- information like your gender, ethnicity or sexual orientation

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If you don't want to give us certain information, you don't have to. For example, if you want to stay anonymous we'll only record information about your problem and make sure you're not identified.

How we use your information

The main reason we ask for your information is to help solve your problem.

We only access your information for other reasons if we really need to - for example:

- for training and quality purposes
- to investigate complaints
- to get feedback from you about our services
- to help us improve our services

All advisers and staff accessing data have had data protection training to make sure your information is handled sensitively and securely.

Understanding people's problems

We use some information to create statistics about who we're helping and what problems are the most common. This information is always anonymised - you can't be identified.

We share these with funders, regulators, government departments and publicly on our blogs, reports, social media and press releases.

The statistics also inform our policy research, campaigns, or media work.

Working on your behalf

When you give us authority to act on your behalf, for example to help you with a Universal Credit claim, we'll need to share information with that third party. This may include the following organisations:

- Housing Associations
- local authorities including specialist departments
- Government agencies including DWP, HMRC etc...
- Creditors including 3rd Party agencies
- Referral agencies
- Funders including MAS, Macmillan, New Forest District Council, etc...
- Specialist agencies including Pensionwise, Healthwatch, Money Plan Independent Financial Advisers, etc...



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When we share your information with other organisations

With your permission, we might share your information with other organisations to help solve your problem or to monitor the quality of our services.

Organisations we share your data with must store and use your data in line with data protection law.

Sharing information to solve your problem

If you ask us to act on your behalf we might need to share some of your information with other organisations - we'll always tell you when we do this. For example if we contact your creditors about your debts, we might need to share your name, address and financial details with them.

If we refer you to another organisation for more advice, we might share information about your problem with them so they can help you more quickly.

Monitoring our quality of service

With your permission, we'll share your contact details with our trusted research partner so they can contact you for feedback on your experience with us.

You can check our [Cookie Policy here](#)

If we're concerned about yours or someone else's safety

If something you've told us makes us think you or someone you know might be at serious risk of harm, we could tell the police or social services - for example if we think you might hurt yourself or someone else.

Storing your information - if you contact us online, by phone or face to face

Whether you get advice face to face, over the phone, by email or webchat, our adviser will log all your information, correspondence, and notes about your problem into our secure case management systems in line with National Policy and information is also kept in paper form in securable locked cabinets.

Staff and volunteer files are kept in secure, locked filing cabinets with limited access.

Some of your information might also be kept within our secure email and IT systems.

We keep your information for 6 years. If your case has been subject to a serious complaint, insurance claim or other dispute we keep the data for 16 years.



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Our case management systems are hosted within the EEA and wherever possible, the UK.

Most of our trusted partners store their data securely within the European Economic Area (EEA) in line with data protection law.

If you contact us for National webchat

In most cases, as well as logging your webchat transcripts in our case management systems, copies are also stored in an online system run by the National Citizens Advice trusted partner Agilisys. It's stored for 3 months before being deleted.

The system is run by National Citizens Advice trusted partner Agilisys.

Agilisys keep anonymised statistics on webchat data in an archive so they can track webchat usage and performance. This data doesn't contain your personal information.

Agilisys store their data securely within the European Economic Area (EEA) in line with data protection law.

Emails between you and your adviser are stored within Citizens Advice New Forest office email system.

If you contact us via our email service

Accessing our email advice service via our website, which is in line with our Privacy Policy.

If your adviser refers you to another Citizens Advice Service

Some other Citizens Advice services store and share your information in different ways.

If your service isn't listed here, there's nothing extra we need to tell you.

If you've been referred to the Citizens Advice Debt Management Service, [find out more about how they use, store and share your personal information](#).

If you've been referred to the Citizens Advice Debt Relief Order (DRO) Team, [find out more about how they use, store and share your personal information](#).

If you've been referred to Pension Wise, [find out more about how they use, store and share your personal information](#).



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If you've been contacted to help with research, campaigns or news

If we've contacted you for help with research, campaigns or media work, we'll have collected information from you by either:

- talking with you over the phone, face to face or by email
- accessing your records on our case management system - if you've got advice from us before
- asking you to pass your details to us - if you've given them permission
- accessing a survey you completed - for example on our website

We might have asked a trusted research partner to contact you on our behalf. These companies should have their own privacy policy relating to how they collect, use and share your personal information.

How Citizens Advice New Forest share your information

All client information that maybe shared with funders is anonymised and securely transmitted in encrypted form and password protected.

Staff, Trustee and Volunteer information is only shared with government departments (such as HMRC) on secure websites.

Contact Citizens Advice New Forest about your information

If you have any questions about how your information is collected or used, you can [contact us](#).

You can contact us to:

- find out what personal information we hold about you
- correct your information if it's wrong, out of date or incomplete
- request we delete your information
- ask us to limit what we do with your data - for example, ask us not to share it if you haven't asked us already
- ask us to give you a copy of the data we hold in a format you can use to transfer it to another service
- ask us stop using your information

Who's responsible for looking after your personal information

The national Citizens Advice charity and Citizens Advice New Forest operate a system called Casebook to keep your personal information safe. This means they're a 'joint data controller' for your personal information that's stored in our Casebook system.



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Each local Citizens Advice is an independent charity, and a member of the national Citizens Advice charity. The Citizens Advice membership agreement also requires that the use of your information complies with data protection law.

When you make a complaint about our service

If you make a complaint, we collect personal information from you so we can help deal with your complaint.

We collect your information from you via phone, email, online form or letter - depending on how you complain.

If someone contacts us on your behalf about a complaint we'll get your permission before we log any of your information.

What information we ask for

So we can help you with your complaint, we need to know:

- your name
- which local Citizens Advice you're complaining about
- one way we can get in touch with you - email, phone or address
- details of the complaint

You don't have to tell us, but we'll also ask you about your:

- address
- phone number
- email
- problem - for example, whether you wanted help with debt or housing

If you tell us you've a disability or support need, we'll also make a note of that so we can help you access our services.

If your complaint is about advice you received, we might need to look at the information we've recorded about your problem.

How we use your information

We use the information you give us to deal with your complaint.

We'll only access your information for other reasons if we really need to - for example:

- for training and quality purposes
- to include anonymised complaint statistics in internal reports



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All staff accessing data have done data protection training to make sure your information is handled sensitively and securely.

When we share your data

If your complaint is about Citizens Advice New Forest, we might refer your complaint to someone there who will look into it. We'll only do this with your permission.

If you escalate your complaint to an external independent adjudicator, we'll share your complaint information with them.

If your complaint involves an insurance claim, we might share details of your complaint with our insurer, ADS.

Storing your information

We'll store your information securely on our internal systems - sensitive data will be password protected.

We keep your data for 6 years. If your complaint is serious or involves an insurance claim or other dispute we keep the data for 16 years.

You can [find out more about your data rights on the Information Commissioner's website](https://ico.org.uk/for-the-public/) at <https://ico.org.uk/for-the-public/>

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