



Privacy Policy — Notice

1. 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.
2. 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.
3. When we record and use your personal information, we:
 - a. only access it when we have a good reason;
 - b. only share what is necessary and relevant;
 - c. don't sell it to anyone.
4. We collect and use the details you give us so we can help you. We have a 'legitimate interest' to do this under data protection law. This means it lets us carry out our aims and goals as an organisation. We'll always explain how we use your information.

Coronavirus: Test and Trace if you get advice in person

If you get advice in person we'll ask for your:

- name
- email address or telephone number

We'll keep this information in our secure case management system.

We might be asked to share your name, contact details and the date of your visit with Test and Trace or local public health organisations. This is to help track cases of coronavirus. They might contact you if they think you're at risk after your visit. For example because someone getting advice at the same time has tested positive for coronavirus. You can find out more about [Test and Trace in England](#) on GOV.UK.

We'll never share information about the reason for your visit.

If you can't give contact details, for example if it's not safe for you to do so, we'll still be able to give you advice in person.

Unlike most situations, we won't ask for your consent before we share your contact details. If you don't want us to share this information you can tell CANF you want to opt out.

We're doing this to help keep you and the public safe. This is a 'legitimate interest' of Citizens Advice.

We won't share your contact details with anyone other than Test and Trace or a local public health organisation.

If we share your information we'll let you know, and offer further support.

If you want to know more about changes to our face to face services or how your information will be used, please us on 0300 3309 009.

Who's responsible for keeping your personal information safe?

5. 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.
6. Citizens Advice New Forest is an independent charity, and a member of the national Citizens Advice charity.
7. 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:
 - a. to comply with the law - for example, if a court orders us to share information. This is called 'legal obligation';
 - b. 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';
 - c. 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';
 - d. 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';
 - e. 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';
 - f. to defend our legal rights – for example, sharing information with our legal advisors if there was a complaint that we gave the wrong advice.
8. We handle and store your personal information in line with the law - including the General Data Protection Regulation and Data Protection Act 2018.
9. You can check our main Citizens Advice policy (<https://www.citizensadvice.org.uk/about-us/citizens-advice-privacy-policy/your-information/>) for how we handle most of your personal information.
10. This Privacy Notice and policy covers how we, as Citizens Advice New Forest, handle your information locally in our offices.

How Citizens Advice New Forest collects your data

When you get advice from an adviser

11. We collect and use the details you give us so we can help you. We have a 'legitimate interest' to do this under data protection law. This means it lets us carry out our aims and goals as an organisation. We'll always explain how we use your information.
12. If you're using our Debt Advice Project and you've been referred to us from another advice charity, they'll send us your information using a referral form. They'll get your permission before sending us your information.
13. We'll get your permission by asking you to either:
 - a. sign a paper consent form;
 - b. tick a box online;
 - c. give agreement over the phone.
14. Before we ask for your permission, we'll always explain how we use your information.

What information we ask for

15. To find out what information we ask for, [see our national Citizens Advice privacy policy](#).
16. You can withdraw your consent at any time. Tell us what personal information you don't want us to store and we'll delete it.

How we use your information

17. The main reason we ask for your information is to help solve your problem.
18. To find out how we use your information, [see our national Citizens Advice privacy policy](#).
19. All advisers and staff accessing data have had data protection training to make sure your information is handled sensitively and securely.

Working on your behalf

20. 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:
 - a. Housing Associations;
 - b. local authorities, such as New Forest District Council, including specialist departments;
 - c. Government agencies including DWP, HMRC, etc;

- d. Creditors including 3rd party agencies;
- e. Referral agencies;
- f. Funders including Single Financial Guidance Body, Macmillan, New Forest District Council, etc;
- g. Specialist agencies including Pensionwise, Healthwatch, Money Plan Independent Financial Advisers, etc.

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

- 21. 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 the National Policy of Citizens Advice and information is also kept in paper form in securable locked cabinets.
- 22. 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.
- 23. 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.
- 24. We'll store your information securely on our internal systems – sensitive data will be password protected.
- 25. Our case management systems are hosted within the European Economic Area (EEA) and wherever possible, the UK.
- 26. Most of our trusted partners store their data securely within the EEA in line with data protection law.

When we share your information with other organisations

- 27. With your permission, we might share your information with other organisations so we can:
 - a. help solve your problem - for example, if you ask us to contact your creditors, we might need to share your name, address and financial details with them;
 - b. refer you quickly to another organisation for more advice, if relevant;
 - c. monitor the quality of our services.
- 28. Organisations we share your data with must store and use your data in line with data protection law.
- 29. All client information that maybe shared with funders is anonymised and securely transmitted in encrypted form and password protected.

Contact Citizens Advice New Forest about your information

30. If you have any questions about how your information is collected or used, you can [contact us](#) and at —
Telephone: 0300 3309 009
Email [CANF](#)
31. You can contact us to:
- a. find out what personal information we hold about you;
 - b. correct your information if it's wrong, out of date or incomplete;
 - c. request we delete your information;
 - d. 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;
 - e. ask us to give you a copy of the data we hold in a format you can use to transfer it to another service;
 - f. ask us stop using your information.
32. You can find out more about your data rights on the Information Commissioner's website at <https://ico.org.uk/for-the-public/>.
33. You can check our Cookie Policy [here](#).