



Citizens Advice Worcester and Citizens Advice Herefordshire

Document Control

Ownership:	Management Team/Trustee Board
Date Issued:	February 2021
Governance Forum responsible:	Trustee Board
Version:	Version (June 2019)
Document history:	Version 1 February 2021
Distribution	Link in Office Manual
Review Date of policy:	February 2022
Review frequency	Annually

Citizens Advice Worcester

Privacy Policy

At Citizens Advice 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 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 or [Test and Trace in Wales](#) on GOV.WALES.

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 your local office 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 [contact your local office](#).

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'
- 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

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

You can check our [main Citizens Advice policy](#) for how we handle most of your personal information.

This page covers how we, as your local charity, handle your information locally in our offices.

How we collect your data

We get permission by asking the client to sign our [revised 'client permission and consent form' which was released in May 2018 and updated in 2020.](#)

What we ask for

To find out what information we ask for [see our national Citizens Advice privacy policy.](#)

How we use your information

To find out how we use your information [see our national Citizens Advice privacy policy.](#)

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.

Examples of organisations that we commonly share your information with to help resolve your problem are:

The Department of Work and Pensions

Worcester City Council

Worcestershire County Council

Herefordshire Council

Local Housing Associations: Platform, Herefordshire Housing, Citizens Housing, Worcester Municipal Charities, Stonewater Housing, Bromford Housing

Gas and Electricity providers such as British Gas, NPower, Octopus Energy, SSE, etc

Water Suppliers: Severn Trent Water, Welsh Water

Debt Recovery Companies

High Street Banks and High Street Lenders

Pay Day Loan Providers: e.g. Provident

How we store your information

Information is stored locally on our secure computer server and also on an Office 365 cloud-based email system. Paper records are also used to store data and are kept in securely locked cabinets, in alarmed offices.

How we share your information

Referrals via ReferNet, (a shared electronic database) to our partners in The Worcestershire Advice Network (Citizens Advice Wyre Forest, Citizens Advice Bromsgrove, Citizens Advice South Worcestershire, DIAL North Worcestershire, DIAL South Worcestershire, Age UK Worcester and Malvern, and Age UK Redditch, Bromsgrove and Wyre Forest). We have a Data Sharing Agreement and standard consent forms or consent procedure for verbal consent.

We share information with the Macmillan Team at Herefordshire County Hospital via a shared electronic data portal with consent. We have a Data Sharing Agreement and standard consent forms or consent procedure for verbal consent.

We share information with Severn Wye Energy who refer clients to us via a shared electronic data portal with consent. We have a Data Sharing Agreement and standard consent forms or consent procedure for verbal consent.

For all other sharing of information, we do not use a shared database but share information by consent. The information is shared electronically, by telephone or by post.

Contact us about your information

If you have any questions about how your information is collected or used, you can contact our office.

Telephone: 0808 278 7891 Monday to Friday 10am-4pm

Email: advice@citaworcester.org.uk

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 your local Citizens Advice 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.

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.

You can [find out more about your data rights on the Information Commissioner's website](#).

