

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 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.

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.

How Citizens Advice Broxtowe collect your data

We primarily use consent to process client personal data.

If you attend our service in person we will obtain your permission to collect your data by asking you to fill out and sign one of our green client permission and consent forms. If you contact us by phone we will ask you for your consent verbally. On web-chats we will ask for your consent as part of the chat.

What Citizens Advice Broxtowe ask for

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

How Citizens Advice Broxtowe 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, money advice or housing, we'll need to share information with that third party.

Examples of our main referral partners are :

Broxtowe Borough Council

Money Advice Service

Free Representation Unity (Nottingham Trent University)

How Citizens Advice Broxtowe stores your information

In addition to the national Citizens Advice charity system called Casebook that is used to keep your personal information safe, we may store information locally, for example - we use a cloud based system called Google Workspace and/or in paper form in secure filing cabinets, and for people using the Mediation Partnership Project we will store personal information on a system called Charity log.

How Citizens Advice Broxtowe share your information

We will only share your information with funders with your consent. Most of the data is anonymised except the data we share with the Money Advice Service. We will gain your consent to share this data if relevant to your case.

We won't share your personal information without your permission, unless we're required to do so by law.

We might ask another organisation or another part of the Citizens Advice service to contact you, so we can find out if you were satisfied with the service you received and more about your experience of Citizens Advice. To do this we'll need to share your contact details.

Sometimes we also share information about how you contacted Citizens Advice, what the topic of your visit was, what level of support you received, and what country you are in. We do this to make sure we hear from different groups of clients and we only share what is absolutely necessary.

If you've given us permission to share your details with the Money and pensions Service (MAPS) for satisfaction monitoring, they, or an agency appointed by them, might contact you by phone, email or letter.

If you've given us permission to share your details and case file with the MAPS for quality monitoring, your issue and the advice you received may be reviewed and feedback given to your adviser.

Contact Citizens Advice Broxtowe about your information

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

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

Please email:- Sally Bestwick, Chief Executive: sally.bestwick@ca-broxtowe.org.uk

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](#).



Last content reviewed 02/02/2021

For people using the Mediation Partnership Project we operate a system called Charity Log to keep your personal information safe. We are Joint Data Controllers with Broxtowe Youth Homelessness for Charity Log for personal information stored on the Charity Log system. The use of personal data complies with data protection laws.