

Citizens Advice East Herts 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 commercial organisations

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 the national [Citizens Advice policy](#) for how we handle most of your personal information.

The following pages covers how we, as your local charity, handle your information locally in our offices.

How Citizens Advice East Herts collect your data

We collect data in line with the national Citizens Advice Policy which can be found at:

<https://www.citizensadvice.org.uk/about-us/citizens-advice-privacy-policy/when-you-get-advice-from-an-adviser/>

What Citizens Advice East Herts ask for

We ask for information in line with national Citizens Advice Policy which can be found at:

<https://www.citizensadvice.org.uk/about-us/citizens-advice-privacy-policy/when-you-get-advice-from-an-adviser/>

How Citizens Advice East Herts use your information

We use your information in line with national Citizens Advice Policy which can be found at:

<https://www.citizensadvice.org.uk/about-us/citizens-advice-privacy-policy/when-you-get-advice-from-an-adviser/> and in the appendix

Working on your behalf

When you give us authority to act on your behalf we'll need to share information with that third party. Examples may include East Herts Council, DWP, your housing association, our pro bono solicitor, your creditors or the local food bank.

How Citizens Advice East Herts store your information

Whether you get advice face to face, over the phone or by email our adviser will log all your information, correspondence, and notes about your problem into our secure case management systems.

Some of your information might also be kept within our secure email and IT systems. We store your information on a cloud based system, in locked filing cabinets and on our telephone answer machine if you leave a message. Once papers are archived they are kept for 6 years, unless there is a reason to keep them longer, and then shredded securely on site. Telephone messages are deleted when they have been listened to.

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.

If you use the consumer service, we keep your information for 6 years and then anonymise it. This means that you can no longer be identified from it.

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.

How Citizens Advice East Herts share your information

If you ask us to act on your behalf we might need to share some of your information with other organisations - We will always ask for your written consent if sharing your data would help to progress your case.

For example if we contact your creditors about your debts, we might need to share your name, address and financial details with them.

You will be asked to sign a consent form which will be stored and retained under our data consent (Protection) policy.

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

We may also need to use your information to monitor the quality of our services.

Contact Citizens Advice East Herts about your information

If you have any questions about how your information is collected or used, you can contact our office by email admin@citizensadviceeastherts.org.uk or by telephone: 03444 111 444, open Monday to Friday 10am-4pm.

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](#).