

Citizens Advice BANES Privacy Policy

From: Citizens Advice

Last review: November 2023

Next review: November 2024

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

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.

How Citizens Advice BANES collects your data

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

- sign a paper consent form
- tick a box online
- give agreement over the phone - if you call our Adviceline.
- Before we ask for your permission, we'll always explain how we use your information.

What Citizens Advice BANES asks for

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

How Citizens Advice BANES uses 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.

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.

For example we may share information with Curo, BANES Council or Wessex Water (but only if you have asked us to do this).

How Citizens Advice BANES stores your information

We store information securely in our electronic case management system (Casebook). In some cases we also keep paper records which are securely stored in our offices. Only authorised staff have access to these.

How Citizens Advice BANES shares your information

Before we share any of your personal data we will ask you for specific permission to do so. We only share personal data for the purpose of helping you to solve your problems. Some of the organisations we regularly share data with in order to help clients are: Wessex Water, Curo, BANES Welfare Support, St John's Foundation, Dorothy House, Cancer Information Service.

Contact Citizens Advice BANES about your information

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

Telephone: 01225 303810, open Monday to Friday 9am-5pm

Email: admin@cab-banes.org

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](#).