

## Citizens Advice Winchester District: 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 Citizens Advice Winchester District collect your data**

If you attend a face-to-face service, you will be asked to sign a consent form detailing how your information is used. Any special category information such as ethnic origin or health problems require your approval for us to record it.

If you are advised through a telephone service, such as our Adviceline, you will be asked to provide this consent verbally.

## **What Citizens Advice Winchester District ask for**

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

## **How Citizens Advice Winchester District 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.

If, with your agreement, we conclude that your case can be best handled by another agency we will share your information with that agency only with your signed consent.

All information shared routinely with our funders is anonymised and is for statistical purposes only.

If you have been referred to our service by someone else, they will need your explicit consent for Citizens Advice to share information or communicate with them.

## **How Citizens Advice Winchester District store your information**

The record of your case will be stored securely in an electronic case management system used jointly by all of the Citizens Advice service. We are all responsible for keeping it safe. As part of solving your problem, we might also make written notes, download copies of your case or send emails containing your information. We will make sure any information is stored securely and only accessed when there's a good reason by staff and volunteers of the Citizens Advice service.

## **How Citizens Advice Winchester District share your information**

We will generally not share information without your permission, unless required to do so by law or in some very limited situations, like to protect you or someone else from serious harm.

If a particular service involves sharing your information without permission, we will always let you know upfront that it isn't confidential.

## **Contact Citizens Advice Winchester District about your information**

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

Telephone: 0808 278 7861, open Monday to Friday 9am to 4pm

Email: [advice@cawinchesterdistrict.org.uk](mailto:advice@cawinchesterdistrict.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](#).