



## How we use your personal information

At Citizens Advice Bury & Bolton (CABB), 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,
- do not sell it to anyone.

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

### **How will you use my data?**

First and foremost, your information will be used to provide you with advice. We also use information, in a way that does not directly identify you, to understand how different problems are affecting society and to take action to tackle these problems. As this is used for research, it is kept separate from your case record.

Where you have given us your permission and contact details, we, or in some instances a trusted research partner, may contact you to ask you for feedback on the service you received and your overall experience of Citizens Advice.

### **Do I have to give my consent for you to use information about me?**

You can decide exactly what information you are happy to tell us. We will use the information because we have a 'legitimate interest' to do so for the purpose of providing you with advice and carrying out research.

When we ask for more private information about you, like health conditions or ethnicity, we will need to get your consent. This is because this information is treated in a special way by the law. You can always withdraw this consent and request we remove what you told us.

*Please note: this leaflet is given to all clients who use CABB services – some elements may not apply to you – speak to your adviser if you are unsure.*

We provide specialist advice & casework for the following areas: Money Advice, Welfare Benefits, Housing, Employment, Immigration & Community Care. There are no charges to receive advice from CABB, with the exception of some immigration matters (these will be made clear if they affect you). Depending on eligibility criteria, legal aid may be available for the following areas: welfare benefits, housing, immigration and community care.

### **Change in your circumstances**

Should your personal or financial circumstances change in any way, you must inform us immediately. For example, if you are receiving support via our Legal Aid services, we will need to reassess your eligibility for Legal Aid. If you do not inform us of any change in your circumstances, we can stop all work on your file and the Legal Aid Agency (LAA) could take steps to recover any monies owed to them for services provided.

### **Fees on file – Legal Aid Advice**

Depending on your financial circumstances, you may need to pay a monthly contribution to the LAA for the work done on your file. We will not commence any chargeable work on your file, without letting you know first.

### **Where will you store my data?**

The record of your case will be stored securely in our electronic case management system, Casebook, 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 is good reason by staff and volunteers of the Citizens Advice Service.

### **How long do you keep records for?**

We keep records for 6 years (from case/ advice closure) in secure storage. We may keep records for 16 years if the advice given could have serious consequences if it was not stored for a longer period.

For Legal Aid cases, we will store your file for 6 years from expiry of the Legal Aid contract we hold.

If you need to refer to the documents again during that period, please give us as much notice as possible, in writing, so that we can have your file ready. After the storage period, we will destroy the file carefully to ensure that the contents remain confidential.

### **Why might you share my information? Who will you share it with?**

We will generally not share information without your permission, unless required to do so by law or in some 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 is not confidential.

At times we might need to 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 the following situations:

- to comply with the law – for example, if a court orders us to share info. This is called 'legal obligation',
- to protect someone's life – for example, sharing info 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.

### **What if I have a question about how my information has been used?**

You can contact us via [wbmteam@cabb.org.uk](mailto:wbmteam@cabb.org.uk) and ask us:

- what information we have stored about you and get a copy,
- to change or update your information,
- to delete your information from our records or withdraw your consent,
- to stop using your information.

### **Concerns or complaints**

If you are not satisfied with the service you receive, we need to know – we welcome all feedback. In the first instance, you can email [feedback@cabb.org.uk](mailto:feedback@cabb.org.uk). The Executive Team will look into your feedback/concerns and make contact with you directly. Our complaint leaflet (copies available) fully explains our process.

You can contact Citizens Advice via 03000 231 900 or email [feedback@citizensadvice.org.uk](mailto:feedback@citizensadvice.org.uk). The following external bodies are also available:

<b>Money Advice Complaints:</b>  <b>Financial Ombudsman Service</b> <a href="http://www.financialombudsman.org.uk/contact-us/complain-online">www.financialombudsman.org.uk/contact-us/complain-online</a> Phone: 0800 023 4567 Email: <a href="mailto:complaint.info@financialombudsman.org.uk">complaint.info@financialombudsman.org.uk</a>	<b>Immigration Advice Complaints:</b>  <b>Office of the Immigration Services Commissioner (OISC)</b> <a href="http://www.gov.uk/find-an-immigrationadviser/complain-about-an-adviser">www.gov.uk/find-an-immigrationadviser/complain-about-an-adviser</a> Phone: 0345 000 0046 E-mail: <a href="mailto:complaints@oisc.gov.uk">complaints@oisc.gov.uk</a>
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