



## **Citizens Advice Richmond 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.

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 [Citizens Advice privacy policy - Citizens Advice](#) 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 Richmond collects your data**

To find out how we collect data, see our [Citizens Advice privacy policy](#)

## **What Citizens Advice Richmond asks for**

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

## **How Citizens Advice Richmond uses your information**

To find out how we use your information, see our [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 the relevant third party.

We commonly share information with:

The Department for Work and Pensions

Richmond Council

Richmond Housing Partnership and other housing associations that operate in the borough, if you are their tenant or leaseholder

Other organisations offering advice or other services, if we refer you to them for help.

## **How Citizens Advice Richmond stores your information**

We store paper files at our offices in Richmond borough.

We store most electronic data on the national Citizens Advice case management system 'Casebook' and on our local servers. An alternative case management system, 'Advice Pro', is used to store client data gathered to provide debt advice.

We use the Citizens Advice Adviceline platform to manage our phone help line and record calls. We use Microsoft Office 365 for emails and individual/shared calendars.

## **How Citizens Advice Richmond shares your information**

We will share relevant information with other organisations, with your consent, if we refer you to them for more help

If you have an appointment with us, and have given your consent to receive text reminders, we may share your mobile phone number with a third-party provider that we use to deliver some of these reminders

We share anonymised stories about a few clients with our funders

We share anonymised data about our staff and volunteers with national Citizens Advice

We share data about our staff with our payroll and bookkeeping providers.

## **Contact Citizens Advice Richmond about your information**

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

Phone: 020 8891 0597 (open during office hours); we cannot give advice on this number.

Email: [admin.HHill@citizensadvice-richmond.org](mailto:admin.HHill@citizensadvice-richmond.org); we cannot give advice on this email.

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 to stop using your information

### **Who's responsible for looking after your personal information**

The national Citizens Advice charity and Citizens Advice Richmond operate a system called Casebook to keep your personal information safe. This means we are a 'joint data controller' for your personal information that's stored in our Casebook system.

Citizens Advice Richmond holds joint responsibility for client data held in AdvicePro with the Money and Pensions Service and Toynbee Hall.

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](#).

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*Reviewed by trustee board: July 2023*

*Date of next review: July 2024*