

Dalkeith CAB

Privacy Policy for Advice Services



1. How will we gain your permission?

1.1 We will seek your permission to hold your data by asking you:

- 1.1.1 To verbally agree,
- 1.1.2 To tick a box online, or
- 1.1.3 Directly by post, electronically (email or webchat) on a form, or by phone.

1.2 If you call us, we may record the conversation for training and monitoring purposes.

1.3 If you've been referred to the CAB from another advice charity or organisation, they will send us your information using a referral form. They should get your permission before sending us your information.

2. What information will we ask for?

2.1 We will only ask for information that is relevant to your problem or issue. Depending on what you want help with, this might include:

- 2.1.1 Your name and contact details (so we can keep in touch with you about your case.)
- 2.1.2 Personal information (for example about family, work or financial circumstances.)
- 2.1.3 Details of service you get that are causing problems (for example energy suppliers or post.)
- 2.1.4 Details of items or services you've bought and traders you've dealt with.
- 2.1.5 Information like your gender, ethnicity or sexual orientation.

2.2 If you do not want to give us certain information, you do not have to. If you do not want us to record and use your information, we can help you as best we can, but advice will be limited and general rather than specific to your circumstances.

3. How will we use your information?

3.1 The main reason we ask for your information is to help you solve your problems or issues. We only access your information for other reasons if we really need to, for example:

3.1.1 For training and quality assurance purposes.

3.1.2 To investigate complaints.

3.1.3 To help us improve our services.

3.2 We might use your contact details to get in touch about your experience of our service or to ask you to take part in surveys or research. We will only do this if you give us permission.

3.3 We use some information to create statistics about who we are helping and what issues they face. This information is always anonymised so you cannot be identified.

3.4 We share the anonymised information above with funders, regulators, government departments and publicly on our blogs, reports, social media and news releases. The statistics also inform our policy research, campaigns and media work.

4. Why and how would we share your information with other organisations?

4.1 With your permission, we might share your information with other organisations to help solve your problems or to monitor the quality of our services.

4.2 When we share your data with other organisations, they must store and use your data in line with data protection law.

4.3 If you ask us to act on your behalf we might need to share some of your information with other organisations. We will always tell you when we do this. For example, if we contact your energy provider about problems you are having with your energy bills, we might need to share your name, address and account details with them.

4.4 If we refer you to another organisation for more advice, we might share information about your problem or issue with them so they can help you more swiftly.

4.5 We might choose to use your information for research purposes on the basis of "legitimate interest." This means it will help us carry out our aims and goals as an organisation. For example, it might be used to create case studies and statistics for our national research. If we use it in this way, your personal details will be anonymised.

4.6 We may sometimes suggest that you go to another organisation, as they may be able to help you with all or part of your issues. We will only make a referral and share your information with them with your consent. Organisations we share your information with must store and use it in line with data protection law.

5. What happens if we are concerned about your or someone else's safety?

5.1 If something you have told us makes us think you or someone you know might be at serious risk of harm, we could tell the police or social services – for example, if we think you might hurt yourself or someone else.

6. How does the CAB store your information?

- 6.1** Whether you contact the CAB and get advice face to face, by phone, by email or webchat, our adviser will log all of your information, correspondence and notes about your problem or issue on the secure CASTLE case management database.
- 6.2** Some of your information might also be kept within the CAB's secure email and IT systems.
- 6.3** We will keep your information for 7 years. If your case has been subject to a serious complaint, insurance claim, or other dispute, we will keep the information for 16 years. These periods are required by law.