

Dalkeith CAB

Privacy Policy if you want to make a complaint about our service



1. What information is needed for making a complaint?

- 1.1 If you make a complaint, we collect personal information from you so we can help deal with it. We have what is known as a 'legitimate interest' in collecting this information.
- 1.2 We collect your information from you via phone, email, online form or letter, depending on how you complain.
- 1.3 To help you with your complaint, we need to know:
 - 1.3.1 Your name
 - 1.3.2 How we can get in touch with you (for example, your email, phone or address)
 - 1.3.3 The details of the complaint.
 - 1.3.4 Information about the problem. For example, whether you wanted help with debt, housing, employment, etc.
- 1.4 If you tell us you've a disability or support need, we'll also make a note of that so we can help you access our services.
- 1.5 If your complaint is about advice you received, we will need to look at the information we've recorded about your problem.

2. How will the CAB use your information?

- 2.1 We use the information you give us to deal with your complaint.
- 2.2 We will only access your information for other reasons if we really need to, for example:
 - 2.2.1 for training and quality purposes
 - 2.2.2 to include anonymised complaint statistics in internal reports

3. Who might the CAB share data with?

- 3.1 If you escalate your complaint to an external independent adjudicator, we will share your complaint information with them.
- 3.2 If your complaint involves an actual or potential insurance claim, we will share details of your complaint with our insurer,

4. How will the information be stored?

Dalkeith & District Citizens Advice Bureau, 8 Buccleuch Street, Dalkeith, Midlothian EH22 1HA
Tel. 0131 660 1636, Email: bureau@dalkeithcab.org.uk. Web: www.DalkeithCAB.org.uk

Scottish registered charity no. SC 000593. Company Limited by Guarantee in Scotland, no. SC 332676.
Authorised and regulated by the Financial Conduct Authority to provide debt advice. FC ref. no. FRN 61744.

- 4.1** 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.
- 4.2** Some of your information might also be kept within the CAB's secure email and IT systems.
- 4.3** 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.