

Privacy Policy

Citizens Advice Felixstowe & District

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 commercial organisations

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.

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 Felixstowe & District collect your data

We'll get your permission to collect your personal information by asking you to either:

- sign a paper consent form
- tick a box online for email enquiries
- give agreement over the telephone

Whether you get advice face to face, over the phone, or by email, our adviser will log all your information, correspondence, and notes about your problem into our secure case management systems.

Some of your information might also be kept within our secure email and IT systems.

We keep your information for 6 years. If your case has been subject to a serious complaint, insurance claim or other dispute we keep the data for 16 years.

What Citizens Advice Felixstowe & District will ask for

We'll only ask for information that's relevant to your problem. Depending on what you want help with, this might include:

- your name and contact details – so we can keep in touch with you about your case
- personal information – for example about family, work, or financial circumstances
- details about services you get that are causing you problems – like energy or post
- details of items or services you've bought, and traders you've dealt with
- information like your gender, ethnicity or sexual orientation

If you don't want to give us certain information, you don't have to. For example, if you want to stay anonymous we'll only record information about your problem and make sure you're not identified.

How Citizens Advice Felixstowe & District uses your information

The main reason we ask for your information is to help solve your problem.

We only access your information for other reasons if we really need to – for example:

- for training and quality purposes
- to investigate complaints
- to get feedback from you about our services
- to help us improve our services

All advisers and staff accessing data have had data protection training to make sure your information is handled sensitively and securely.

We use some information to create statistics about who we're helping and what problems are the most common. This information is always anonymised – you can't be identified. We share these with funders, regulators, government departments and publicly on our blogs, reports, social media and press releases. The statistics also inform our policy research, campaigns, or media work.

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

When you give us authority to act on your behalf, examples are to help you with a Universal Credit claim, we'll need to share information with a third party such as the Department of Work and Pensions and the local authority Suffolk Coastal District Council or if we contact your creditors about your debts, we might need to share your name, address and financial details with them.

If you ask us to act on your behalf and need to share some of your information with other organisations – we'll always tell you when we do this. Organisations we share your data with must store and use your data in line with data protection law.

To find out how we use your information, see our national Citizens Advice privacy policy

How Citizens Advice Felixstowe & District store your information

Your information is stored within our secure case management systems which include local computer servers, Citizens Advice Casebook and Microsoft 365. Any information recorded on paper documents is kept in secure storage facilities at our offices. Archived paperwork is located in a secure storage facility.

We keep your information for 6 years. If your case has been subject to a serious complaint, insurance claim or other dispute we keep the data for 16 years.

How Citizens Advice Felixstowe & District share your information

We'll get your permission to share your personal information by asking you to either:

- sign a paper consent form
- tick a box online for email enquiries
- give agreement over the telephone

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

If we refer you to another organisation for more advice, we might share information about your problem with them, so they can help you more quickly

Examples of organisations that we may need to share your personal information with to help you with your issue may include:

- Local statutory authorities i.e. Suffolk County Council/Suffolk Coastal District Council/ NHS
- Other charitable organisations i.e. The BASIC Life Charity/Felixstowe Salvation Army /The Rope Trust
- Housing providers i.e. local authorities/housing associations/private landlords
- Department of Work and Pensions
- Her Majesty's Revenue and Customs
- Her Majesty's Court service
- Employment Tribunal Service
- Local Solicitors

If you ask us to act on your behalf and we need to share some of your information with other organisations – we'll always tell you when we do this.

Organisations we share your data with must store and use your data in line with data protection law.

Contact Citizens Advice Felixstowe & District about your information

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

Telephone: 0300 330 9016

Monday to Friday 10am - 1.00pm

Monday 2.00pm – 5.00pm

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 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.

Note: This privacy policy only covers this website www.felixstowecab.org.uk; other websites linked from this website are not covered by this policy. Once you have accessed another website via one of our links you will be subject to the security and privacy policy of that site.