



Client permission and consent form

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

We need to record information about you to help with your enquiry. We have a legitimate interest to do this. Please let us know if you'd like more information about how we'll use your data.

Client Name			
Client Address			
Date of birth		Gender	

I prefer to be contacted by (please tick all those that apply)

- Email
- Mobile
- Home telephone
- Work telephone
- Home address

Please **do not** use the following contact (e.g Address)

We need your consent to record and use your special category personal data

We need your explicit consent to use some information, including your ethnicity, religion, health conditions, sexual orientation and trade union membership.

If you agree, we'll use this information, which is known as 'special category personal data' to:

- give you advice
- help us gather data to improve our service
- support our research in a way that you can't be identified

We'll make sure all your information is kept safe in our secure case management system.

By ticking the boxes below you consent to Citizens Advice recording the special category personal data you choose to provide Citizens Advice.

Yes, I consent to you holding information on my (please tick all of those you agree to)

Ethnicity **Health Condition** **Religion**

Sexual orientation **Trade Union membership**

We need your consent to use your special category personal data to monitor the quality of the advice we give

We need your explicit consent to use some information, including your ethnicity, religion, health conditions, sexual orientation, trade union membership and political opinion. This data will form part of the information contained within your whole case file that may be selected to be sent by secure courier to Recognising Excellence or the Money Advice Service's quality partner to monitor the quality of advice we give.

If you agree, we'll use this information, which is known as 'special category personal data' to help us gather data to monitor the quality of our service.

We'll make sure all your information is kept safe in our secure case management system and by Recognising Excellence or the Money Advice Service's quality partner.

By ticking the boxes below you consent to Citizens Advice sending your special category personal data to Recognising Excellence or the Money Advice Service's quality partner.

Yes, I consent to you sending information on my (please tick all of those you agree to)

Ethnicity **Health Condition** **Religion**

Sexual orientation **Trade Union membership**

We need to share your data with our funders

We need your explicit consent to use some information, including your ethnicity and health conditions in our reporting to our funders, the Money Advice Service. This data will be used to monitor the performance of the service we provide you and ensure the project is serving your community.

By ticking the boxes below you consent to Citizens Advice sending your special category personal data to the Money Advice Service for the purpose of monitoring performance and funding.

Yes, I consent to you sending information on my (please tick all of those you agree to)

Ethnicity **Health Condition** **Religion**

Sexual orientation **Trade Union membership**

Can we contact you for feedback?

We, and our funder the Money Advice Service, want to make sure our service meets your needs. To help us understand how we're doing and to improve our service, you may be contacted at a later date to ask for your feedback. Sometimes Citizens Advice, our research partner PWC Research, the Money Advice Service, or the Money Advice Service's research partner help us do that.

Yes, I consent to you sending information on my (please tick all of those you agree to)

Ethnicity **Health Condition** **Religion**

Sexual orientation **Trade Union membership**

We'll decide who we contact for feedback based on the services you used and the advice area. We may also use your special category data so that we hear from different groups.

Please tick the box below if you agree to us getting in touch.

I agree to Citizens Advice (or their research partner) selecting me for feedback using my information and contacting me

I agree to the Money Advice Service (or their research partner) selecting me for feedback using my information and contacting me

Your signature

Name:	
Signature:	Date:

For administration purposes

Client reference number:

Case reference number:.....

How we use your personal information

We collect and use information about you to help solve your problems, improve our services and tackle wider issues in society that affect people's lives.

We always let you decide what you're comfortable telling us, explain why we need your information and keep it confidential. When we keep something you tell us, we:

- only access it when we have a good reason
- only share what is necessary and relevant
- don't sell it to commercial organisations

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 doesn't 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'll 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 any 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.

Some of our specialist services, such as our Money Advice service, are provided on the basis of your consent. We will ask your consent to use your personal information with these services.

Where will you store my data?

The record of your case will be stored securely in an electronic case management system 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's a good reason by staff and volunteers of the Citizens Advice service.

How long do you keep records for?

We keep records for 6 years. We may keep records for 16 years if the advice given could have serious consequences if it was not stored for a longer period.

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 very 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 isn't confidential.

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

You can contact us and ask us:

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

If you have any questions about how your information is collected or used, you can contact us at. [insert address of local office]

You can read more detailed information about how some of our services use information on our national site: citizensadvice.org.uk/privacy-policy

If you're not happy with how we have used your information, you can contact us at:

www.citizensadvice.org.uk/about-us/contact-us/Contact-us-form

You can also contact the Information Commissioner's Office to raise a concern about how we have used your information.

ico.org.uk/
0303 123 1113