

When you get advice from an adviser: Coatbridge Citizens Advice Bureau privacy policy

We'll seek your permission to hold your data by asking you:

- To verbally agree
- To tick a box online; or
- Directly by post, electronically (email or webchat) or over the phone.

If you call us, we may record the conversation for training and monitoring purposes. If you've been referred to us from another advice charity or organisation, they'll send us your information using a referral form. They should get your permission before sending us your information.

What information we 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. 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.

How we use 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 help us improve our services.

For quality assurance purposes we will share relevant information with external auditors, this ensures our advice remains accurate and up to date.

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

We use some information to create statistics about who we're helping and what issues they face. 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.

When we share your information with other organisations

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

Organisations we share your data with must store and use your data in line with data protection law. If you ask us to act on your behalf we might need to share some of your information with other organisations - we'll 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.

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.

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, to create case studies and statistics for our national research. If we use it in this way, your personal details will be anonymised.

Who we share your information with

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

If we're concerned about yours or someone else's safety

If something you've 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.

Storing your information - if you contact us online, by phone or face to face

Whether you get advice face to face, over the phone, by email or webchat, our adviser will log all your information, correspondence, and notes about your problem <<insert storage method e.g. CASTLE>>. Some of your information might also be kept within our secure email and IT systems.

We keep your information for 7 years. If your case has been subject to a serious complaint, insurance claim or other dispute we keep the data for 16 years.