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 anyone

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 and the
Data Protection Act 2018. 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 Hertsmere collect your data**

We'll collect your data and get your permission by asking you to either:
Complete and sign a paper consent form.

Submit data and tick a consent box online.

Give agreement via email or over the phone – if you email us directly without completing our online form.

Give agreement over the phone – if you call our Advice line service
Before we ask for your permission, we'll always explain how we use your information.

If you're using one of our specialist projects and you've been referred to us from another organisation such as Hertsmere Borough Council or Herts Help, they'll send us your information using a referral form. They'll get your permission before sending us your information.

**What Citizens Advice Hertsmere 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 Hertsmere 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 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. At Citizens Advice Hertsmere, 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.

**Working on your behalf**

When you give us authority to act on your behalf, for example to help you with a Universal Credit claim, we may need to share information with that third party. We may share your information with the following:

• Hertsmere Borough Council
• Local housing associations
• Herts Help
• Foodbanks - Borehamwood, Potters Bar, Watford or the Red Trust
• Bushey
• Employers
• Tribunals
• Courts
• DWP
• HMRC
How Citizens Advice Service Hertsmere store your information

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 system. We also keep paper copies relating to your enquiry if it is absolutely necessary. Some of your information might also be kept within our secure email and IT systems, in locked filing cabinets and on our telephone answer machines if you leave a message.

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. If you use the Consumer Service, we keep your information for 6 years and then anonymise it. This means that you can no longer be identified from it.

If you use the Extra Help Unit, we keep your information for 3 years from when we close your case. Our case management systems are hosted within the EEA and wherever possible, the UK. Most of our trusted partners store their data securely within the European Economic Area (EEA) in line with data protection law.

How Citizens Advice Hertsmere share your information

We only share information with relevant local organisations if we have received your consent to do. We might share your information to help solve your problem or monitor the quality of our services. We would only share your information via a secure e-mail with the message password protected.

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

Sharing information to help solve your problem

When you give us authority to act on your behalf, for example to help
you with a Universal Credit claim, we may need to share information with that third party. Where you give us consent, we may share information with the following:

• Hertsmere Borough Council
• Local housing associations
• Herts Help
• Foodbanks - Borehamwood, Potters Bar, Watford or the Red Trust Bushey
• Employers
• Tribunals
• Courts
• DWP
• HMRC
• Jobcentre Plus
• Creditors
• Experian
• Landlords
• GPs
• Charities

**Contact Citizens Advice Hertsmere about your information**
If you have any questions about how your information is collected or used, you can contact our Elstree, Bushey or Potters Bar offices or email: elstreeadvice@hertsmerecab.org.uk.

**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 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 case management 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.

Disclaimer and Copyright

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