



**CLIENT DETAILS**

First Name

Last Name

Date of Birth

Gender

Male

Female

Unknown

Ethnicity

Prefers another term:

Prefers not to say

ADDRESS

Postcode

Email Address

Home Phone  
NumberMobile Phone  
Number**Please ensure you get consent for Contact Methods. (Please put a tick in the box for consent given)**Ok to leave  
Voicemail

Ok to send Letter

Ok to send  
Text (SMS)

Okay to send Email

Able to attend a video call via Zoom or other video calling software

Any additional Contact Instructions

**REFERRAL DETAILS**

**Summary of Issue.** Please provide as many details as possible. Eg. if enquiry is regarding debt, please let us know approx how much is owed and the type of debt (rent arrears, Council Tax arrears, credit card repayments etc).

Are there any specific time limits or reasons for urgency? Eg. Court dates, eviction dates.

**Client Consent - I give permission for this information to be passed to, and held by Citizens Advice North Lancashire, who will treat it in the strictest confidence.**

Client Signature (or please indicate if consent given verbally):  
consent give by email.

Date:

## Citizens Advice North Lancashire : General Data Protection Regulation Policy

### 1. Statement of policy

Citizens Advice North Lancashire is fully committed to compliance with the requirements of the General Data Protection Regulation (GDPR), Data Protection Act 2018 and any successor legislation (together, the 'data protection legislation'). Citizens Advice is committed to a policy of protecting the rights and freedoms of individuals with respect to the processing of their personal data and special category personal data.

Citizens Advice North Lancashire will therefore follow procedures which aim to ensure that all employees and volunteers, and others who have access to any personal data held by or on behalf of the local office, are fully aware of and responsible for the handling of personal data in line with the data protection legislation.

In order to operate efficiently, Citizens Advice North Lancashire has to collect and use information about people with whom it works. These may include current, past and prospective clients; current, past and prospective employees; current, past and prospective volunteers; and our suppliers.

### **Data protection legislation and in particular Article 5 (1) of the GDPR requires that personal data shall be used in accordance with the following principles:**

#### 2. Handling of personal data and special category personal data

Citizens Advice North Lancashire will, through appropriate management and the use of appropriate controls adhere to the following in regards to our use of personal data and special category personal data;

- Provide up to data privacy notices to data subjects.
- Collect and process appropriate information and only to the extent that it is needed to fulfil operational needs or to comply with legal requirements.
- Ensure the quality and accuracy of information when collected or received and during its use.
- Apply checks to determine the length of time information is retained.
- Take appropriate technical and organisational security measures based on risks to data subjects.
- Not transfer outside the EEA without suitable safeguards.
- Ensure that any information incidents are reported to national Citizens Advice and where appropriate the data subject and the Information Commissioner's Office.
- Mitigate risks to the data subjects in the event of an information incident using an appropriate data breach policy.
- Ensure that the rights of our data subjects can be properly exercised.

These rights include: The right to be informed, have access, to rectification, to erase, to restrict processing, to data portability, to object and have rights in relation to automated decision making and profiling.