



Citizens Advice Rhondda Cynon Taf (CARCT)

Privacy Policy

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.

This privacy policy explains how we use your information and what your rights are. We handle and store your personal information in line with data protection law and our confidentiality policy. The following tells you more about how we use your information in more detail.

Our network

Citizens Advice is a membership organisation made up of the national Citizens Advice charity and many local offices across England and Wales, including Citizens Advice Rhondda Cynon Taf (CARCT). CARCT is an independent charity and a member of the national Citizens Advice charity.

All members of the Citizens Advice network are responsible for keeping your personal information safe and making sure data protection law is followed.

Members of the network also run some jointly designed services and use some of the same systems to process your personal data. In these instances we are joint data controllers for these activities.

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 are a 'joint data controller' for your personal information that is stored in our Casebook system.

Jointly controlled data

All offices in the Citizens Advice network use some joint systems to carry out our activities. These include joint case management systems, telephony platforms and more.

Staff from a different local Citizens Advice can only access your personal information in a joint system if they have a good reason. For example, when:

- you go to a different office to seek advice
- more than one office is working together in partnership
- they need to investigate a complaint or incident

We have rules and controls in place to stop people accessing or using your information when they shouldn't.

Tell an adviser if you're worried about your details being on a national system. We'll work with you to take extra steps to protect your information - for example by recording your problem without using your name.

National Citizens Advice has a [privacy notice](#) available on their website that covers general advice and nationally managed systems, including our case management systems. This policy covers the processing we carry out in our office.

How we use your data for advice

This section covers how we use your data to provide you with advice. For general advice and nationally funded advice programmes please see the national Citizens Advice [privacy notice](#).

What Citizens Advice Rhondda Cynon Taf ask for

We will only ask for information that is 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 have bought, and traders you have dealt with.
- Special Category Data like your ethnicity, health conditions, trade union membership, religion, or sexual orientation.
- If you do not want to give us certain information, you do not have to. For example, if you want to stay anonymous, we will only record information about your problem and make sure you are not identified.

How Citizens Advice Rhondda Cynon Taf use your information

To find out how we use your information, [see our national Citizens Advice privacy policy](#).

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.

Our lawful basis for using your information

Generally our lawful basis for using client data to provide advice is '[legitimate interests](#)'. There is a clear legitimate interest in helping clients with an issue they are seeking advice on so this is our default lawful basis. However there are circumstances where another lawful basis may be applicable. In particular there are some services which we have a statutory basis to deliver advice for example, consumer advice. Where this is the case the most appropriate lawful basis is '[public task](#)'.

When using special category data for advice purposes we can generally rely on '[establishment, exercise or defence of legal claims](#)'. While our advice doesn't always often relate directly to a legal claim, we can also rely on this condition when establishing, exercising or defending legal rights in any way. We can rely on this without providing formal legal advice. This will include but is not limited to advice types such as employment, discrimination, housing, benefits, debt and money and immigration.

There is also an equivalent condition for criminal offence data in the Data Protection Act 2018, Schedule 1, Part 3 (33) that allows the processing of criminal offence data in the same way as the above.

However not all our advice will relate to legal rights in this way. There are also times where we discuss welfare which isn't related to rights. For example, for a client looking for support with wellbeing, In such cases you can rely on the '[counselling provision](#)' which is one of the '[substantial public interest](#)' conditions.

Similarly to the personal data conditions, where we have a statutory basis for delivering advice we also are able to rely on our [statutory basis](#) to process client data. These conditions combined will ensure that we can use client special category and criminal convictions data for all generalist advice and nationally funded services without needing to rely on consent.

Our confidentiality policy

At Citizens Advice we have a confidentiality policy which states that anything you tell us as part of advice will not be shared outside of the Citizens Advice network unless you provide your permission for us to do so.

There are some exceptions to this such as needing to share:

- to prevent an immediate risk of harm to an individual
- In select circumstances if it is in the best interests of the client
- where we are compelled to do so by law (e.g. a court order or meeting statutory disclosures)
- where there is an overriding public interest such as to prevent harm against someone or to investigate a crime
- to defend against a complaint or legal claim
- to protect our name and reputation for example to provide our side of a story reported in the press

How Citizens Advice Rhondda Cynon Taf share your information

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

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 will need to share information with that third party. We will only share the minimum amount of information needed to progress your case, and only with your consent.

If you ask us to act on your behalf, we might need to share some of your information with other organisations - we will always tell you when we do this. For example, if we contact your creditors about your debts, we might need to share your name, address, and financial details with them

Examples of who we share with are the Department for Work and Pensions regarding benefit queries, creditors to negotiate debt repayments on your behalf and Rhondda Cynon Taf CBC regarding queries about council tax or Housing Benefit.

How we use your data for research, feedback and statistics

National Citizens Advice covers use of data for this purpose in their [privacy notice](#).

How we use your data for fundraising and donations

National Citizens Advice covers their use of data for fundraising in their [privacy notice](#).

How Citizens Advice Rhondda Cynon Taf store your information

Your information is stored securely on our systems. All our systems are hosted within the European Economic Area (EEA) and wherever possible, the UK. We keep your information for 6 years and then anonymise it - this means you cannot be identified from it. Your information might also be stored in other ways, depending on how we communicate with you.

If you used email

- Emails between you and our team are stored on our cloud hosted platform.
- Emails are kept for between 6 months and one year and then deleted.

If you contacted us by phone

- If you contact us or are contacted by phone, calls are recorded and stored securely by our trusted partner, 3CX.
- 3CX store their data securely within the European Economic Area (EEA) in line with data protection law.
- Recordings are kept for 6 months and then deleted.

Your data protection rights

You have rights in relation to your personal data that we hold. Your rights include being able to request:

- Access to copies of your data
- Corrections are made to inaccurate data
- Deletion of your personal data
- Object to how we use your personal data

These rights are not absolute and may not apply in every circumstance. For more information about your rights you can visit the ICO website.

To make a data protection rights request you can do so by emailing contactus@carct.org.uk.

Raising a concern about how we use your information

If you are concerned about how we have handled your personal information please contact us at contactus@carct.org.uk.

You can also contact the national charity if you are unhappy with how we have used your personal data or wish to raise a concern about how a local office has handled your personal data. To do so you can email us at DPO@citizensadvice.org.uk

Contacting the Information Commissioner's Office (ICO)

You can also raise your concern with the Information Commissioner's Office which regulates data protection law in the UK. if you are unhappy with how we have used your personal information.

They will normally expect you to have made a complaint to us directly in the first instance.

- [Visit the ICO website.](#)
- Address: Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF
- Helpline number: 0303 123 1113

Further information

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

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Email: contactus@carct.org.uk
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