

Privacy Policy

West View Advice & Resource Centre Limited (WVARC) is committed to protecting and respecting your privacy.

This notice sets out how WVARC uses and protects any information you provide when using our services, or by contacting us via our website, email, telephone or in person. We have a responsibility to keep the personal details that you provide confidential. We will only collect, process and store information that has been collected from you with your consent.

To help us deliver the right services to you, WVARC needs certain information about you. This means that we have a 'legitimate interest' in collecting some of your information.

When using personal data, WVARC complies with the General Data Protection Regulation (GDPR) and the Data Protection Act 2018 (DPA) and is the registered 'data controller.' Our data protection notification is registered with the Information Commissioners' Office (ICO), reference Z8158563.

Who are we?

WVARC are a company limited by guarantee (Company No. 2994776) and a registered charity (Charity No. 1084632) and have been delivering free independent advice across Hartlepool for over 40 years.

If you have any questions about this privacy notice, want to exercise any of your legal rights under GDPR and DPA, or you have a complaint about how we use, or have used personal data, please:

- Email: reception@wvarc30.org.uk
- Call: 01429 271275
- Or write to: Data Protection Officer, West View Advice & Resource Centre, The Community Centre, Miers Avenue, Hartlepool, TS24 9JQ.

If you are unhappy with our response to any questions that you may have or we have been unable to satisfactorily resolve your concern or complaint, you can contact the ICO by:

- Email: casework@ico.org.uk (you need to put 'report a concern' in the subject line)
- Call: 0303 123 1113 (option 5)
- Or write to: Customer Contact, Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, SK9 5AF

By using our website or services, you are agreeing to the terms of this Privacy Policy. If you do not agree to our Privacy Policy, then please do not use this site.

How do we collect information from you?

We obtain information about you when you use our service. This information is obtained when you make an appointment to see an advisor and/or during an appointment with an adviser and/or if you are referred to us by another organisation with your consent. Information is also collected if you make a donation to us.

What type of information is collected about you?

We collect 'personal data' which might include your name, address, email address, telephone number, date of birth, national insurance number, NHS number, marital status, ethnicity, household status, employment status, income details and information about any health conditions you may have. By providing this information, you are providing your consent that all of the personal data you submit can be processed in the manner in which you expect.

Our commitment

When we handle and store our clients' personal information we follow the law, including the Data Protection Act 2018 and the General Data Protection Regulation [GDPR] (EU) 2016/679. The principles that we will follow are:

1. Lawful, fair and transparent

Data collection must be fair, for a legal purpose and we must be open and transparent as to how the data will be used.

2. Limited for its purpose

Data can only be collected for a specific purpose.

3. Data minimalization

Any data collected must be necessary and not excessive for its purpose.

4. Accurate

The data we hold must be accurate and kept up to date.

5. Retention

We cannot store data longer than necessary.

6. Integrity and Confidentiality

The data we hold must be kept safe and secure.

When we ask you for personal information we promise to:

- explain why we need it
- only ask for what we need
- treat it as confidential

When we record and use your personal information we promise to:

- only access it when we have a valid reason to do so
- only share what is necessary and relevant
- protect it and make sure nobody had access to it who shouldn't

When we share your personal information with another organisation we promise to:

- ensure that this is only done with your consent, or if we're required to do so by law
- follow the ICO Data Sharing Code of Practice from time to time to ensure the other organisation treats your information with the same level of care that we do.

All staff who handle personal information are given training and we take it very seriously if someone fails to use or protect it properly.

Please let us know as soon as possible if anything relating to your contact details or situation changes which may affect the information we hold, or if there are any mistakes with the data we hold, for example, a name that is incorrectly spelt. You have a right under GDPR for your information to be accurate.

How do we use your information

We will use the personal data to provide you with the appropriate services, products, or information that you have requested, for administration purposes or to further our charitable aims.

Where we have consent or the law allows us to, we will share information across partners in order to ensure that the right services are received at the right time. We will store personal information securely and in line with the Data Protection Act 2018 and GDPR. If you make a Gift Aid declaration on a donation to us, we will pass on the relevant data to HM Revenue and Customs for the purpose of reclaiming tax.

We may use your information for the purposes of research and evaluation, when making a case for the funding of our services and for providing monitoring returns to our funders. In these situations, your information is used in such a way that you cannot be identified from it.

We review our retention periods for personal information on a regular basis. We are legally required to hold some types of information to fulfil our statutory obligations (for example to maintain our Advice Quality Standard). We will hold your personal information on our systems for as long as is necessary for the relevant activity, or as long as is set out in any relevant contract you hold with us.

We reserve the right to share your personal information if we are legally obliged to, this can include exchanging information with other organisations for fraud and police investigations.

Unfortunately, no transmission of data over the internet is 100% secure. As a result of this, WVARC will, and do take, all steps possible to protect the personal data you provide through our website however, we are unable to guarantee the security of the information you transmit to us, and you do so at your own risk. WVARC do however, use strict procedures and security features to prevent unauthorised access to it.

The Rights of Individuals

Below is a list of the rights that a person has under Data Protection legislation – See Appendix 1 for summary of each.

Some of the rights are complex, and not all of the details have been included in our summaries. Accordingly, you should read the relevant laws and guidance from the regulatory authorities (ICO) for a full explanation of these rights:

- The right to be informed
- The right of access
- The right of rectification
- The right to erasure

- The right to restrict processing
- The right to data portability
- The right to object
- Rights in relation to automated decision making and profiling.

Data Protection Procedures

All new staff, volunteers and trustees will be asked to confirm that they have read WVARC's Confidentiality Policy, this Privacy Policy and the Data Protection procedure.

The Centre Manager is the data controller.

Storing Data

- All client's files are stored electronically on our case management system – Advice Pro.
- Any paper files are all stored at WVARC's main office in Miers Avenue, Hartlepool, TS24 9JQ.
- All employees will maintain a 'clear desk'
- Staff will use strong passwords which are set to be changed regularly.
- Data should never be stored on any device including desktop computers, laptops, tablets or smart phones.

Destroying Data

- Printed data will be shredded when it is no longer needed.
- Records held on Advice Pro are automatically deleted after six years.
- Confidential waste bins are provided in the main office for the collection and subsequent shredding/destruction of confidential documents.
- All staff are responsible for making sure that personal data is shredded.

Transferring data internationally

There are restrictions on international transfers of personal data. We will not transfer personal data abroad, or anywhere else outside of normal rules and procedures without express permission.

Subject Access Request (SAR)

Under GDPR individuals can make a Subject Access Request in writing to be:

- Told whether any personal data is being processed.
- Given a description of personal data, the reasons it is being processed, and whether it will be given to any other organisations or people.
- Given a copy of the information comprising the data.
- Given details of the source of the data (where available)

Disclosure of Personal Information

All staff and volunteers, including Trustees, should be familiar with the Confidentiality Policy, which sets out WVARC's commitment to good practice in handling personal information.

- Data protection checks must be completed before giving any information over the telephone. This involves asking security questions: Name; DOB, First line of address and postcode.
- If individuals or other agencies contact WVARC in connection with a client, no information should be given without the client's permission. If a client arranges to collect copies of information held on their file, we need a signed receipt for our records. A copy of all information given to the client should be kept at WVARC.
- If there is any doubt about disclosure, consult with a member of the Management team.

Personnel Records

Data held in personnel files:

- CV
- Induction: to include bank account details, next of kin
- References
- Correspondence – including confirmation of job offer/resignation
- Contract – copy of contract of employment
- Evidence of right to work in the UK
- Copy of DBS Certification
- Training
- Job Description
- Supervision notes/Appraisal notes
- Self-Certification Sickness forms
- Return to Work Interview notes.

No additional information will be kept as a matter of routine, but other documents may be kept for specific reasons e.g.

- Arrangements relating to periods of leave – paid or unpaid.
- Evidence of appropriate vehicle insurance
- Requests for information e.g. for mortgages, rental agreements
- Warnings under the disciplinary procedure
- 'Right to be forgotten' means that if you no longer want your data to be processed and provided that there are no legitimate grounds for retaining it, the data will be deleted; otherwise, it is automatically destroyed after being held on file for six years.

Staff are entitled to have access to data held in their own electronic personnel records upon request.

WVARC will follow the Data Protection Act 2018 and personnel files, including electronic personnel files, are destroyed securely six years after the worker leaves WVARC. Prior to this they are stored separately in a locked filing cabinet which only the Management team have access to, with the date for destruction marked on them. Electronic personnel records are also moved to an archive folder with a data for permanent deletion.

NOTE: *This policy will be subject to an annual review. The Company reserves the right to amend this policy in the light of any future changes in legislation or business need.*

APPENDIX 1 – Rights of Individuals

Right of the individual under data protection law are:

1. The right to access;
 2. The right to rectification;
 3. The right to erasure;
 4. The right to restrict processing;
 5. The right to object to processing;
 6. The right to data portability;
 7. The right to complain to a supervisory authority; and
 8. The right to withdraw consent.
1. You have the right to confirmation as to whether or not we process your personal data and, where we do, access to the personal data, together with certain additional information. That additional information includes details of the purposes of the processing, the categories of personal data concerned and the recipients of the personal data. Providing the rights and freedoms of others are not affected, we will supply to you a copy of your personal data. The first copy will be provided free of charge, but additional copies may be subject to a reasonable fee.
 2. You have the right to have any inaccurate personal data about you rectified and, taking into account the purposes of the processing, to have any incomplete personal data about you completed.
 3. In some circumstances, you have the right to the erasure of your personal data without undue delay. Those circumstances include: the personal data are no longer necessary in relation to the purposes for which they were collected or otherwise processed; you withdraw consent to consent-based processing; you object to the processing under certain rules of applicable data protection law; the processing is for direct marketing purposes; and the personal data have been unlawfully processed. However, there are exclusions of the right to erasure. The general exclusions include where processing is necessary: for exercising the right of freedom of expression and information; for compliance with a legal obligation; or for the establishment, exercise or defence of legal claims.
 4. In some circumstances, you have the right to restrict the processing of your personal data. Those circumstances are: you contest the accuracy of the personal data; processing is unlawful but you oppose erasure; we no longer need the personal data for the purposes of our processing, but you require personal data for the establishment, exercise or defence of legal claims; and you have objected to processing, pending the verification of that objection. Where processing has been restricted on this basis, we may continue to store your personal data. However, we will only otherwise process it: with your consent; for the establishment, exercise or defence of legal claims; for the protection of the rights of another natural or legal person; or for reasons of important public interest.
 5. You have the right to object to our processing of your personal data on grounds relating to your particular situation, but only to the extent that the legal basis for the processing is that the processing is necessary for: the performance of a task carried out in the public interest or in the exercise of any official authority vested in us; or the purposes of the legitimate interests pursued by us or by a third party. If you make such an objection, we will cease to process the personal information unless we can demonstrate compelling legitimate grounds for the processing which override your interests, rights and freedoms, or the processing is for the establishment, exercise

or defence of legal claims. You have the right to object to our processing of your personal data for direct marketing purposes (including profiling for direct marketing purposes). If you make such an objection, we will cease to process your personal data for this purpose. You have the right to object to our processing of your personal data for scientific or historical research purposes or statistical purposes on grounds relating to your particular situation, unless the processing is necessary for the performance of a task carried out for reasons of public interest.

6. To the extent that the legal basis for our processing of your personal data is: a. consent; or b. that the processing is necessary for the performance of a contract to which you are party or in order to take steps at your request prior to entering into a contract, and such processing is carried out by automated means, you have the right to receive your personal data from us in a structured, commonly used and machine-readable format. However, this right does not apply where it would adversely affect the rights and freedoms of others.
7. If you consider that our processing of your personal information infringes data protection laws, you have a legal right to lodge a complaint with the Information Commissioner's Office.
8. To the extent that the legal basis for our processing of your personal information is consent, you have the right to withdraw that consent at any time. Withdrawal will not affect the lawfulness of processing before the withdrawal. You may exercise any of your rights in relation to your personal data by written notice to us.

Appendix 2 – Privacy Notice

West View Advice & Resource Centre Limited (WVARC) is committed to protecting and respecting your privacy. This notice explains when and why we collect personal information about people who use our service, how we use it, the conditions under which we may disclose it to others and how we keep it secure.

Any questions regarding this Policy and our privacy practices should be sent by email to reception@wvarc30.org.uk or by writing to The Community Centre, Miers Avenue, Hartlepool, TS24 9JQ. Alternatively, you can telephone 01429 271275.

Who are we?

WVARC are a company limited by guarantee (Company No. 2994776) and a registered charity (Charity No. 1084632) and have been delivering free independent advice across Hartlepool for over 40 years.

What is personal data?

Personal data is information that can be used to help identify an individual, such as name, address, phone number or email address.

The policy in brief

Here is a brief summary:

- We collect personal data (as outlined above) to be able to work on behalf of our clients, helping them with their money worries, to fundraise for our work and for administration, research and analysis
- We do our very best to keep personal information safe and secure
- We only share data where we are required by law or with carefully selected partners who do work for us or fund the work that we do. We never sell your data and we will never share it with another company or charity for marketing purposes.
- We will only retain your data for as long as it is required.

How do we collect information from you?

We obtain information about you when you use our service. This information is obtained when you make an appointment to see an advisor or complete a client registration form during an appointment with an adviser and/or if you are referred to us by another organisation using our online referral system.

What type of information is collected about you?

The personal information we collect might include your name, address, email address, telephone number, date of birth, national insurance number, NHS number, marital status, ethnicity, household status, employment status, income details and information about any health conditions you may have.

Our commitment

When we handle and store our clients' personal information we follow the law, including the Data Protection Act 2018 and the General Data Protection Regulation [GDPR] (EU) 2016/679.

When we ask you for personal information we promise to:

- explain why we need it
- only ask for what we need

- treat it as confidential

When we record and use your personal information we promise to:

- only access it when we have a valid reason to do so
- only share what is necessary and relevant
- protect it and make sure nobody had access to it who shouldn't

When we share your personal information with another organisation we promise to:

- ensure that this is only done with your consent, or if we're required to do so by law
- follow the ICO Data Sharing Code of Practice from time to time to ensure the other organisation treats your information with the same level of care that we do.

All staff who handle personal information are given training and we take it very seriously if someone fails to use or protect it properly.

If you're unhappy with how we record and use your information you can ask for a copy of our complaints procedure.

Please let us know as soon as possible if anything relating to your contact details or situation changes, which may affect the information we hold.

Giving your consent

We must ask for your consent to record, use, or share personal information, except when we are required by law to do so.

What you're agreeing to

If you give us your consent you are saying that we can record and use your personal information to help with your issue(s).

Where we have consent or the law allows us to, we will share information across partners in order to ensure that the right services are received at the right time. We will store personal information securely and in line with the Data Protection Act 2018 and GDPR.

We may use your information for the purposes of research and evaluation, when making a case for the funding of our services and for providing monitoring returns to our funders. In these situations your information is used in such a way that you cannot be identified from it.

We review our retention periods for personal information on a regular basis. We are legally required to hold some types of information to fulfil our statutory obligations (for example to maintain our Advice Quality Standard). We will hold your personal information on our systems for as long as is necessary for the relevant activity, or as long as is set out in any relevant contract you hold with us.

How we'll store your information

We'll store your personal details and the record of your case on secure internet based systems, which are only accessed by us. Paper copies of your information are also stored securely and only accessed when necessary by staff and volunteers of the advice service.

We will never share your information with any other parties without your prior consent unless you have requested us to do so, or we are required to do so by law, for example, by a court order or for the purposes of prevention of fraud or other crime.

How you can access and update your information

The accuracy of your information is important to us. If any of the information we hold is inaccurate or out of date, please email us at: reception@wvarc30.org.uk, or write to us at: The Community Centre, Miers Avenue, Hartlepool, TS24 9JQ. Alternatively, you can telephone 01429 271275.

You have the right to ask for a copy of the information we hold about you (known as a 'subject access request'). To make this request please email reception@wvarc30.org.uk with 'Subject Access Request' in the subject line or write to us at: The Community Centre, Miers Avenue, Hartlepool, TS24 9JQ. Your request will be carried out within one month unless there is a good reason for this not to be possible. In this event we will contact you and explain why we cannot carry out your request within one month. We will provide the information free of charge unless the request is manifestly unfounded or excessive in which case we will charge a reasonable fee.

If you have a concern you have the right to complain to the Information Commissioner's Office (ICO). Find out how to report a concern to the ICO <https://ico.org.uk/concerns/>

Your Rights

The Data Protection Act gives you certain rights over your data and how we use it. These include:

- A right of access to a copy of the information comprised in your personal data;
- A right to object to processing that is likely to cause or is causing damage or distress;
- A right to prevent processing for direct marketing;
- A right to object to decisions being taken by automated means;
- A right in certain circumstances to have inaccurate personal data rectified, blocked, erased or destroyed; and
- A right to claim compensation for damages caused by a breach of the Act

To find out more about what these rights mean for you, refer to the Information Commissioner's website: <https://www.ico.org.uk/>