# Client permission and consent form

# 

# Casebook ref: ………………………………………………….

# 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 commercial organisations

We need to record information about you to help with your enquiry. We have a legitimate interest to do this. Please let us know if you’d like more information about how we’ll use your data.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Client**  **Name** |  | | **National Insurance No:** | |
| **Client Address** |  | | | |
| **Date of birth** |  | **Gender** | |  |
| **Preferred Language** | English – YES/NO | Other: | | |

**I prefer to be contacted by** (please tick all those that apply) **and if we can contact you by**

**☐** Email ……………………………………….…………………… Voicemail Text

**☐** Mobile ……………………………………….…………………  

**☐** Home telephone ……………………………………….………  

**☐** Letter ……………………………………….………………………………………………...

**Conflict of Interest Check (Office use only)**

|  |  |  |
| --- | --- | --- |
| Name of other  party/parties |  | Identified  YES/NO: |

**We need your consent to record and use your special category personal data**

We need your explicit consent to use some information, including your ethnicity, religion, health conditions, sexual orientation, trade union membership and political opinion.

If you agree, we’ll use this information, which is known as ‘special category personal data’ to:

* give you advice
* help us gather data to improve our service
* support our research in a way that you can’t be identified

We’ll make sure all your information is kept safe in our secure case management system.

By ticking the boxes below you consent to Citizens Advice recording the special category personal data you choose to provide Citizens Advice.

**Yes, I consent to you holding information on my** (please tick all of those you agree to)

**Ethnicity ☐ Health Condition ☐ Religion ☐**

**Sexual orientation ☐ Trade Union membership ☐**

**Can we contact you for feedback?**

We want to make sure our service meets your needs. To help us understand how we’re doing and to improve our service, we may want to contact you at a later date to ask for your feedback. Sometimes we need a trusted research organisation to help us do that.

We’ll decide who we contact for feedback based on the services you used and the advice area. We may also use your special category data so that we hear from different groups.

Please tick the box below if you agree to us getting in touch.

**☐ I agree to Citizens Advice selecting me** **for feedback using my information and contacting me**

**Consent to share information for referrals**

Everything you tell us will be treated confidentially. Sometimes we may suggest that we refer you to another organisation for advice because they will be better able to help you with all or part of your problem. We can help get you an appointment and give the organisation the information you have already provided so you don’t have to repeat yourself.

**☐ I agree to Citizens Advice service sharing my personal information with other advice providers for efficient appointments and referrals to help me with my problems.**

**Your signature**

|  |  |
| --- | --- |
| **Name:** | |
| **Signature:** | **Date:** |