

**SURNAME: FIRST NAME: CLIENT NO:**

**SCANNED DATE:**

**RECORD UPDATED:**

**CLIENT NO: CL** -

**GATEWAY NO:**

**Client permission and consent form**

**SURNAME: FIRST NAME: CLIENT NO:**

When we record and use your personal information we:only access it when we have a good reason**,** only share what is necessary and relevantand wedon’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.

|  |  |  |  |
| --- | --- | --- | --- |
| First name: | | Last name: | |
| Title: | Date of birth: | | Postcode: |

|  |  |
| --- | --- |
| Address:  Can we send you a letter? ☐Yes ☐ No | |
| E-mail address:  Can we send you email? ☐ Yes ☐ No | |
| Mobile:  Can we leave voicemail? ☐ Yes ☐ No | Home phone:  Can we leave voicemail? ☐ Yes ☐ No |
| Please tick your preferred contact methods: ☐ Email ☐ Home ☐ Mobile ☐ Letter | |
| National insurance number: | |
| If you get advice in person, we might be asked to share your name, contact details and the date of your visit with NHS Test and Trace. This is to help them track cases of coronavirus. You can opt out using this form, or by asking your office at any time.  Please **do not** give my information to Test and Trace                                        **☐** | |

**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 and trade union membership.

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 and 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 the service you receive 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 and also let us know how you’d prefer to be contacted.  
**☐ I agree to Citizens Advice selecting me** **for feedback using my information and contacting me**

**I give permission to be** contacted **for feedback** by:  (please tick below all that apply).

☐ Email ☐ Home phone ☐ Mobile ☐ Mobile (by text message)

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