

## Age UK Sheffield customer privacy notice

Age UK Sheffield collects and processes personal data relating to its customers in order to provide services to older people living in Sheffield and to fulfil the vision and mission of our charity

**For a city in which no older person lives in poverty or loneliness For every person in Sheffield to approach later life with independence, dignity, and a sense of wellbeing; and for Age UK Sheffield to be recognised as a vital part of Sheffield's infrastructure in support of the needs of the city's older people.**

Age UK Sheffield is committed to being transparent about how it collects and uses that data and to meeting its data protection obligations.

### What information does Age UK Sheffield collect?

If you are in receipt or accessing an Age UK Sheffield service including

- Independent Living Coordination services
- Information and Advice services
- Wellbeing Centre
- Age UK Sheffield At Home Service

we collect and process a range of information about you. This may include and is not limited to:

- your name, address and contact details, including email address and telephone number, NHS number, National Insurance number, date of birth and gender;
- your previous profession (for example if you were in the armed services and accessing our veteran service)
- your next of kin (where you receive services from us so that we know who to contact in an emergency)
- Your caring responsibilities
- information relating to your health (for example if you are living with cancer or if you are applying for health related benefits, for example PIP or Attendance Allowance)
- information about your financial situation (where you share this information with us to help you access benefits that you may be entitled to)
- information about your marital status, next of kin, dependants and emergency contacts;
- your bank details where you provide these to make a payment for services received;

- age, nationality and ethnicity information for monitoring purposes; and
- any other personal information you provide to us.

Certain types of personal information are in a special category under data protection laws, as they are considered to be more sensitive. Examples of this type of sensitive data would be information about health, race, religious beliefs, sexuality or genetic/biometric information. We only collect this type of information to the extent that there is a clear reason for us to do so

Our services include specialist services to people living with long term health conditions including cancer, kidney failure, COPD and dementia. Therefore, to access these services it is necessary to understand the health conditions that customers are living with. We will ask questions about your health in order that we can provide the right service to meet your needs. Our holistic assessment includes questions about your health, your home and your finances. You can share as much information with us as you feel comfortable and you have the choice as to whether to answer specific questions.

We will also collect this type of information if you volunteer it to us – for instance if you tell us you have cancer when accessing our cancer services or information about how your health affects your ability to do day to day tasks if you are making a claim for Attendance Allowance.

### **How does Age UK Sheffield collect personal information?**

Age UK Sheffield collects this information in a variety of ways. For example, data is collected through referral forms if a health or social care professional makes a referral on your behalf, via our needs assessment form which we will complete if we visit you at home from correspondence with you; or through meetings or other assessments.

### **Why does Age UK Sheffield process personal data?**

Age UK Sheffield needs to process data to be able to provide services to you.

Whether you get advice face to face, over the phone or by email our staff team will log all your information, correspondence, and notes about your issues into our secure case management systems. Some of your information might also be kept within our secure email and IT systems.

The main reason we ask for your information is to provide a service to you that addresses the issues that you have.

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 staff accessing data have had data protection training to make sure information is handled sensitively and securely.

## **Understanding the issues commonly faced by older people living in Sheffield**

We use some information to create statistics about who we're helping and what problems are the most common. This information is always anonymised so that you can't be identified. We share these with funders, reports, social media and press releases.

### **Legal basis for processing data**

#### **Consent**

When accessing Age UK Sheffield services we will always get your permission by asking you to either:

- give agreement over the phone - if you call our office to make a self referral or want help with a quick query
- sign a paper consent form.
- If we are carrying out a home visit and completing a holistic assessment we will ask you to complete a Data Protection Agreement. This will give you the opportunity to stipulate how and with whom your data can be shared.

In some cases, Age UK Sheffield needs to process data to ensure that it is complying with its legal obligations. For example, it is required to comply with health and safety laws.

In other cases, Age UK Sheffield has a legitimate interest in processing personal data before, during and after the end of the customer relationship.

#### **When we use your information without permission**

In most cases, we'll get your permission to collect, use, store and share your information. At times we might use or share your information without your permission. If we do, we'll always make sure there's a legal basis for it. This could include situations where we have to use or share your information:

- to comply with the law, called 'legal obligation' - for example, storing financial information for a minimum period of six years or sharing information if a court orders us to do so
- to protect someone's life, called 'vital interests' - for example, sharing information with a paramedic if a customer was unwell at our office or raising a safeguarding issue where someone was at risk of harm
- to carry out our aims and goals as an organisation, called 'legitimate interests' - for example, creating anonymous case studies and statistics
- to carry out a contract we have with you, called 'contract' - for example, if you receive a paid for service from us
- to defend our legal rights - for example, to resolve a complaint that we gave the wrong advice.

## **Sharing Information with Third Parties**

If you are accessing Age UK Sheffield Services we may share your personal information with third parties to help solve the issue that you came to us with.

These may include:

- Your GP (where you have given consent for us to do so)
- The person that made a referral on your behalf (where you have given consent for us to do so)
- Organisations that we have agreed to make referrals to as part of your support plan
- Organisations that you have consented to us contacting on your behalf
- The DWP (if we are completing a benefit application on your behalf)
- Funders, this includes Sheffield Clinical Commissioning Group, Sheffield City Council, Weston park Cancer Charity, The Big Lottery, Age UK National etc
- There might be specific organisations we share your information with, depending on what service you access.

### **How will my data be stored?**

Your information will be recorded securely on our Customer Record Management system and in other IT systems (including the organisation's email system).

### **How does Age UK Sheffield protect data?**

Age UK Sheffield takes the security of your data seriously. Age UK Sheffield has internal policies and controls in place to try to ensure that your data is not lost, accidentally destroyed, misused or disclosed, and is not accessed except by its employees in the performance of their duties.

Where Age UK Sheffield engages third parties to process personal data on its behalf, they do so on the basis of written instructions, are under a duty of confidentiality and are obliged to implement appropriate technical and organisational measures to ensure the security of data.

### **For how long does Age UK Sheffield keep data?**

We take the principles of data minimisation and removal seriously and have internal policies in place to ensure that we only ever ask for the minimum amount of data for the associated purpose and delete that data once it is no longer required.

Typically if you are receive a service from Age UK Sheffield we will retain your data for a minimum period of six years.

## **Your rights**

As a data subject, you have a number of rights. You can:

- access and obtain a copy of your data on request;
- require Age UK Sheffield to change incorrect or incomplete data;

- require Age UK Sheffield to delete or stop processing your data, for example where the data is no longer necessary for the purposes of processing;
- object to the processing of your data where Age UK Sheffield is relying on its legitimate interests as the legal ground for processing; and
- ask Age UK Sheffield to stop processing data for a period if data is inaccurate or there is a dispute about whether or not your interests override the organisation's legitimate grounds for processing data.

If you would like to exercise any of these rights, please contact [enquiries@ageuksheffield.org.uk](mailto:enquiries@ageuksheffield.org.uk) or phone 0114 250 2850

If you believe that Age UK Sheffield has not complied with your data protection rights, you can complain to the Information Commissioner.

### **How you can access and update your information**

You can contact us at any time and ask us:

- what information we've stored about you
- to change or update your details
- to delete your details from our records

To do this please email [enquiries@ageuksheffield.org.uk](mailto:enquiries@ageuksheffield.org.uk) or phone us on 0114 250 2850

Please note that relying on some of these rights, such as the right to deleting your data, will make it impossible for us to continue to deliver some services to you. However, where possible we will always try to allow the maximum access to your rights while continuing to deliver as many services to you as possible.

### **Quality Standards**

Age UK Sheffield holds a number of Quality Standards including Age UK Information and Advice Quality Programme. This ensures that our organisation provides accurate and high quality advice.

As part of the assessment process a review of case files (where consent has been granted) will take place by Age UK (the National body) as the quality assurance auditor to ensure the advice given meets the required standards.

### **Evaluation and research**

If we've contacted you for help with research or media work, we'll have collected information from you by either:

- talking with you over the phone, face to face or by email
- accessing your records on our case management system - if you've received a service from us before

With your consent we might ask a research partner or evaluator to contact you on our behalf. These companies should have their own privacy policy relating to how they collect, use and share your personal information.

We'll always tell you how we'll use your information and ask your permission. For example, by signing a paper consent form or giving agreement over the phone . We only ask for the information we need to tell your story or inform our research. Depending on how we want you to help us, this might involve being involved in a focus group, 1-1 interview or telephone interview and may include information about:

- your situation, health or financial circumstances - and how it affects you in the form of a case study
- your contact with Age UK Sheffield and what you thought about us
- your name and contact details - so we can keep in touch with you
- demographic information like your gender, ethnicity or sexual orientation

If you don't want to give us some personal details, you don't have to. When we contact you we'll explain how we want to use your information - for example, we might want to:

- ask you to share your story with the media
- include your information in a report or blog use your information to improve our services

If we're sharing your story publicly, you can stay anonymous if you want to - we'll change some details of your story to make sure you can't be identified.

### **Transferable outside EEA**

We will not transfer any personal data to countries outside the EEA.

### **Review of this Policy**

We may modify this Privacy Policy from time to time and will publish the most current version on our website. If a modification meaningfully reduces your rights, we will notify people whose personal data we hold and is affected