



Client Care Policy

CHAI Advice Service is free, impartial, confidential, and manned by staff skilled in Money, Housing, and Welfare Rights Advice. Our aim is to alleviate poverty and disadvantage through the provision of advice, information, and representation services.

In order for you to gain the maximum benefit from our service, it is essential that you have an understanding of what the service is able to do and what will be expected from you.

You will be expected to: -

- Attend all appointments or advise us if you are unable to attend. (Failure to keep appointments without good cause may force us to stop dealing with your case.)
- Supply accurate details of your circumstances as requested by the adviser dealing with your case.
- Keep us informed of any change in your circumstances or difficulty in maintaining any agreed repayment arrangements.
- Not approach another advice service while asking us to act on your behalf. Creditors/landlords will not deal with two agencies acting on your behalf at the same time.
- Provide your written permission authorising this service to contact agencies and act on your behalf.
- Behave reasonably towards our staff.

We will: -

- Behave reasonably towards you, and treat you with respect at all times
- Ensure that any information about your circumstances is treated in a confidential manner.
- Meet you in a private interview room, or in your own home in appropriate circumstances.
- Obtain written authorisation from you prior to approaching creditors or any other relevant third party.
- Discuss your circumstances only with relevant parties.
- Ensure that any documentation and case notes pertaining to your case is stored securely,
- Destroy any documents and paperwork in relation to your case (no longer than 6 years since your last contact) in accordance with CHAI policies.
- Reserve the right to withdraw from your case if you disclose any criminal activity in relation to your affairs (e.g. fraud) unless full disclosure is or has been made to the wronged party. In such circumstances we will advise you to take appropriate legal advice.
- Reserve the right to withdraw our services if you do not maintain this agreement or if you wish to pursue a course of action to which we do not wish to become party. We will give you adequate notice of such action if we feel we have to do this.
- Keep you informed of the progress we are making on your case, including key dates.

You can feedback to us at any time about your experience of using our services. Follow this link: <https://www.surveymonkey.com/r/CHAIfeedbackanytime> or ask for a paper copy.



Respectful Behaviour Charter

We are committed to providing a welcoming environment where everyone feels respected and valued. To help us achieve this, we kindly ask all users of our services to follow these guidelines during interactions with our staff and other users/clients.

1. Respectful Communication

- We encourage respectful and considerate conversations at all times.
- Please avoid dismissive language or raising your voice. We are here to listen and help, and mutual respect ensures the best experience for everyone.

2. Non-Violent and Safe Behaviour

- To maintain a safe space for everyone, we ask that all interactions remain calm and non-threatening.
- If you're feeling upset, please let us know so we can find a solution together.

3. Boundaries

- Personal space, appropriate language, and physical boundaries should always be respected.
- Please refrain from any form of harassment, including intimidation, unwanted attention, flirtatious behaviour, unwanted physical contact or excessive close proximity with our staff. Everyone deserves to feel safe and respected.

4. Clear Respectful Language

- Please address staff by their names and avoid using pet names or overly familiar language.
- Clear respectful communication helps ensure a positive and productive interaction.

5. No Discriminatory Behaviour

- We are committed to creating an inclusive environment free from discrimination.
- Please refrain from making comments or behaving in a way that could be hurtful or disrespectful based on gender, race, ethnicity, or sexuality.

6. Constructive Feedback and Concerns

- We value your input and are here to help. If you have concerns, please share them in a respectful and constructive way so we can work together to resolve any issues.
- Your feedback is important to us, and we strive to make your experience as positive as possible.



Data Protection and Privacy Statement

Please read this Privacy Notice. It relates to how we hold and process your information (data) and your rights. We recommend that you retain this Privacy Notice for future reference.

CHAI is a "data controller" in terms of the Data Protection Act 2018. This means that we are responsible for deciding how we hold and use personal data about you. We are required under data protection legislation to notify you of the information contained in this privacy notice. We have a duty to keep your data secure and maintain your confidentiality and we will do so.

We will process your data, including certain special category data (being data relating to race, ethnic origin, physical or mental health or condition) on the lawful basis that we have your explicit consent to do so.

We will only process and use your data for the purpose of carrying out the advice, information, representation or support services we have agreed to provide for you and not for any other purpose. Your data is held on our computer systems. We have an obligation to keep this data accurate and we will endeavour to do so. Similarly, you are obliged to inform us of any data we hold that may no longer be accurate and we ask that you do so.

We will share a very limited amount of your data with the third parties who fund the services we provide for you; we consider this is in the legitimate interests of our business. Any other data we hold on you will only be shared with a third party where you give specific consent for us to do so.

Your data will be retained once the contract between us has ended within our Content Management System.

Your rights

You are entitled to request copies of the data we hold about you. You are also entitled to receive confirmation from us that we are processing your data, what that data is, and to ensure that your data is correct and ask for it to be rectified if it is not. In addition, you have the right to object to our processing your data and ask that it be deleted.

If you have any questions regarding how CHAI uses your personal data please contact our 'Data Controller' – Teresa Sutherland, Project Executive, on 0131 442 2100.

Complaints about CHAI's management of personal data can be made to the Information Commissioner's Office (0303 1231113)



Data Protection and Privacy Notice

Use of AI Recording for Case Note Summaries

CHAI uses a secure, approved AI system called Wyser Assist to assist with writing case notes from appointments. This may involve audio recording your appointment, transcribing the conversation using AI and creating a draft summary of the discussion. This AI processing is entirely optional and only carried out if you explicitly consent.

Explicit consent

- AI recording and transcription will only take place if you explicitly consent.
- You may opt out at any time, and this will not affect the advice or support you receive.
- If you do not consent, your appointment will not be recorded and staff will take manual notes instead.

Important safeguards

- All phone call recordings are encrypted and deleted within 30 days.
- Audio recordings of face-to-face appointments, made through a mobile phone app or a desktop recorder app, are deleted after 48 hours and cannot be played back on staff's devices. The audio recordings are encrypted and securely transferred to a web platform (Wyser Assist) for transcription.
- Transcripts and case notes are deleted from the Wyser AI web platform after 30 days.
- Only the final case notes are securely stored on CHAI's Case Management System.
- Recordings are not linked to your name on the Wyser AI web platform, apps or on any devices.
- Staff must review, correct and approve all AI-generated drafts of case notes.
- You may request correction of any inaccuracies in the notes.
- Your information will never be used to train AI models.

If you have any questions regarding how CHAI uses your personal data, please contact our 'Data Controller' Teresa Sutherland, Project Executive, on 0131 442 2100. Complaints about CHAI's management of personal data can be made to the Information Commissioner's Office (0303 1231113).