

## Client Agreement

### Citizens Advice Broxbourne will provide you with:

- **Confidential advice.** We will not tell anyone about your case and will not pass on anything from our records to anyone outside the Citizens Advice service without your permission, unless we are required to do so by law or it is the right and necessary thing to do. Our records are subject to quality checks. We will respect your data protection rights for any information you provide to us. Please see our [Privacy Policy](#) if you would like to know more.
- **Follow-up work.** Any follow up work will be agreed between your adviser and you. This may include negotiating on your behalf with other organisations by letter or phone. We will discuss any offer with you before accepting it, unless you have specifically told us what to do.
- **A complaints procedure,** if you are not satisfied with the service we have provided or if you have any comments or suggestions for improvement, you can write to us. Ask for our leaflet which explains how to complain, or download it [here](#).

If you have problems writing or communicating any feedback, please call **0300 303 4417** and we will arrange for someone to take details of your feedback for further action.

We cannot guarantee to take on all cases, even if someone is already a client. We may also have to stop advising you if we believe we cannot make progress on your case for you or there is no further good outcome that can be gained, or if you do not do what we expect of you (see below).

# Client Agreement and Appointment Policy

## In return, we expect you:

- To keep appointments you have made with us or let us know in advance if you can't make it.
- To inform us of any changes in your circumstances which may be relevant to your case. Examples of relevant changes are change of address, birth of a child, additional income
- To bring in, or send by email, all the papers relevant to your case which your adviser asks for. This includes notification of court or tribunal dates etc.
- Not to take action on your case on your own behalf without discussing it first with your adviser.
- To provide written evidence of your income, debts or other financial matters where appropriate. Your adviser will let you know what is needed.
- To follow our advice – unless you and your adviser agree you should do something different.
- To be honest with us about the circumstances of your case, for instance by telling us about all your debts and income or what led up to your being asked to leave your employment.
- To always treat our staff and volunteers with dignity and respect.

We reserve the right to stop advising you if:

- you turn down a reasonable offer from the other party because you wish to take the matter to a tribunal or court hearing. Your adviser will discuss with you whether an offer is reasonable in the circumstances.
- you do not follow our expectations listed here.

## Client Appointment Policy

We do our best to provide a high quality service to as many clients as we can. When clients miss appointments without giving us notice, it can have a serious impact on the service and therefore we have the following policy to deal with appointment problems.

### **If you are going to be late for your appointment**

If you are going to be **late** for an appointment, please contact us as soon as you can - phone **0300 303 4417**, text **07984 367235** or email [appointments@citizensadvicebroxbourne.org](mailto:appointments@citizensadvicebroxbourne.org)

We will try to keep your appointment open, but depending on the circumstances we may have to give your slot to someone else and you will need to contact us for a new appointment.

### **If you cannot attend your appointment**

If you are not able to **attend your appointment**, please contact us as soon as you can - phone **0300 303 4417**, text **07984 367235** or email [appointments@citizensadvicebroxbourne.org](mailto:appointments@citizensadvicebroxbourne.org)

We will try to reschedule your appointment as soon as we can.

### **If you miss appointments**

We understand that life can be complicated and that unforeseen circumstances do arise. We will take into account any specific circumstances that may prevent you from getting in touch. However, if we have been unable to reach you after multiple attempts, we will assume that you no longer need our help. You would need to contact us on our phone service **0808 278 7915** so we can discuss the way forward. Alternatively, you might find it more convenient to seek advice from another organisation.

If you consistently fail to attend our appointments, or if you continually ignore the advice that we have given, then we may exclude you from our service. This will only be done in the most serious of circumstances and we will always notify you in writing if we intend to do this.

### **If Citizens Advice Broxbourne needs to reschedule your appointment**

There *are* occasions when we may need to reschedule your appointment because a volunteer or member of staff is ill, or due to circumstances beyond our control. We will contact you as soon as we become aware of the problem, so it is important that we have your correct phone number, or an alternative way of getting a message to you, such as email.