**PRIVATE & CONFIDENTIAL**

**Client Information Form**

Working in partnership with

**PLEASE COMPLETE AND RETURN THIS FORM BEFORE YOUR MEETING.**

**We do not pass your information on to the other party, without your prior consent.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Forename** |  | **Address 1** |  |
| **Surname** |  | **Address 2** |  |
| **Telephone** |  | **Town** |  |
| **Mobile** |  | **Post code** |  |
| **Email** |  |
| **IMPORTANT FUNDING INFORMATION (must be completed)**Please read the accompanying Legal Aid Eligibility details (at the end of this document). Based on the details, do you believe you may be entitled to Legal Aid? (please delete as appropriate) **YES** **NO**  |
| **If you do, please enter the following information and we will send you further details on processing a claim:** |
| **N.I. Number** |  | **DOB** |  |
| **Dispute relates to: (please cross out or delete leaving the applicable)** **child arrangements financial property** |
| **Your Children** (if applicable) Please continue at end of the form if you need more space. |
| Forename | Surname | D.O.B. | School | Lives with | Special needs? |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| Has there been any involvement from Social Services? **YES NO**. If yes, please give brief details: |
| **Details of OTHER PARTY (e.g. your husband, wife, ex-partner, son, daughter)** |
| **Forename** |  | **Address 1** |  |
| **Surname** |  | **Address 2** |  |
| **Telephone** |  | **Town** |  |
| **Mobile** |  | **Post code** |  |
| **Email** |  | **DOB** |  |
| **Details of your relationship** (if applicable) |
| **Date of marriage** |  | **Date of separation**  |  |
| **Month and year you began living together** |  | **Month and year you ceased living together** |  |
| **If married, date of decree nisi**  |  | **decree absolute** |  |
| **Have there been any reports or convictions of domestic violence to the police within the last 12 months?** **YES NO**.If yes, please give brief details: |
| **Name and date of any court orders (e.g. child arrangement order, restraining order):** |
| **Do you have a disability or mental health condition that could be affected by, or affect your ability to mediate? YES NO** |
|

|  |
| --- |
| The Legal Aid Agency requires us to ask you for the following information in order to assist them in the provision of mediation services. We would therefore be grateful if you would mark the ethnic group to which you belong by ticking the box below. If you would prefer NOT to provide the following information, please tick the box: |
| Ethnic Origin | **Tick** | **Ethnic Origin** | **Tick** |
| White British |  | **Black or Black British Other** |  |
| White Irish  |  | **Black or Black British Caribbean**  |  |
| White Other |  | **Black or Black British African** |  |
| Asian or Asian British |  | **Mixed White and Black Caribbean** |  |
| Asian or Asian British Pakistani |  | **Mixed White and Black Caribbean** |  |
| Asian or Asian British |  | **Mixed White and Black African** |  |
| Asian British other |  | **Mixed White and Asian** |  |
| Indian Asian |  | **Mixed Other** |  |
| Chinese |  | **Other (please state below)** |  |
| Unknown |  |  |
| Do you have a disability (please circle)? YES NO  |
| DECLARATION* You confirm that the information provided is true to the best of your knowledge and you can provide evidence to support it.
* You understand you must have your formal Legal-Aid Assessment before your MIAM and in the same week you intend to have it.
* You understand that Family Mediator Bath’s Legal-Aid claims are processed in partnership with Compass Resolution and you give us consent to share your personal and financial information with them to do so.
 | Sign | Date |

**Legal Aid clients only** |
| **ALL CLIENTS****GDPR and the Data Protection Act 1998**Our privacy policy is inserted after this form for you to read. Please do so before you complete the following section of this form. |
| **I have read and understood Family Mediator Bath’s Privacy Policy (attached to the end of this document)**(please circle or embolden) YES / NO |
| **GDPR CONSENT****Please insert your initials in the relevant, yes or no, box.**  | **Yes** | **No** |
| Do you give consent to Family Mediator Bath using the personal information you have given herewith to facilitate the mediation process, which may involve sharing you details with third parties: Compass Resolution (if a legal-aid claim is made), our mediator’s self-employed Personal Assistant, or your solicitor, if applicable? |  |  |
| Do you give consent to Family Mediator Bath using your personal information to contact you about your mediation by **telephone?**  |  |  |
| **What is your preferred contact number** |  |
| Do you give consent to Family Mediator Bath using your personal information to contact you about your mediation by **email** |  |  |
| Do you give consent to Family Mediator Bath using your personal information to contact you about your mediation by **post** |  |  |
| Do you give consent to Family Mediator Bath contacting the other party(ies) named, as part of the mediation process? Please note will not do this without informing you before. |  |  |
| Do you give consent to Family Mediator Bath giving your personal information to the courts (if applicable)? |  |  |

Privacy Policy

**Family Mediator Bath (FMB)**

FMB works within the requirements of the Data Protection Act 1998 and the General Data Protection Regulation 2018 (GDPR).  FMB is registered with the Information Commissioner’s Office (ICO) and subject to their oversight and regulation.

This privacy notice outlines the reasons we ask for your personal data, how we manage and look after the data you give to us and your rights under GDPR.

FMB is committed to ensuring the lawful and careful collection of your personal information, the appropriate use and secure storage of your personal information and that we meet our other commitments under the regulations.

Please be assured, your information will not be used by us nor shared with anyone or any organisation for marketing purposes

We are committed to keeping your data as safe and secure as possible and to protecting it against unauthorised access.  However, as transmission of information electronically can never be completely secure, we cannot guarantee complete security and your information is provided to us electronically (via the internet/by online means) at your own risk.  When requesting information from us by electronic means or sending information to us by electronic means, it is important that you ensure you do so via a channel which you trust to be safe.

**Why we need certain personal data from you**

FMB provides family mediation service and related services.  The reason we need to process some of your personal data is to enable us to provide those services

* as part of a contract with you
* to give you access to the mediation information and assessment (MIAM) process introduced under the Children and Families Act 2014, s10.

**Information we collect**

We may collect the following information in order to provide a service to you/make a contract with you/provide access to MIAM:

* Personal information including your name, email address, mailing address, phone numbers, date of birth, national insurance number.
* Details of your children and/or details of your finances\* dependent on the type of services we are being asked to provide to you.
* From time to time and as permitted by applicable law(s), we may collect other Personal Data about you and update any existing Personal Data that we currently hold from other third-party sources.

**We collect your information from**

* Referral Forms on our website (these may be completed and submitted to us by you or your representative at your request with a view to FMB providing you with a service)
* Referral Forms on our website completed and sent to us by a third party to enable us to give you access to the mediation information and assessment (MIAM) process introduced under the Children and Families Act 2014, s10.
* Electronic and paper-based communications from other referring agencies including but not limited to Cafcass, Family Law Solicitors, HM Courts Services
* telephone conversations, emails, face to face written or verbal communications with you, your representative or a third party
* our appointment/session records

**How we Use Your Information**

* To provide our services under our contract with you
* To respond to your requests and enquiries
* To give you access to a MIAM
* To improve our services, for example, by requesting feedback, your participation in surveys or other initiatives which will help us to gather information to develop and enhance our services
* To comply with applicable law(s), for example, to comply with a court order or to carry out professional ethics/conduct investigations
* To enable us to maintain our own accounts and records and to support and manage our staff.

**Lawful Processing of data**

We collect and process data in line with our legitimate interests, which include processing such Personal Data for the purposes of

* providing a service to you at your request under contract, and enhancing the provision of our services
* providing access to a MIAM
* administration and service delivery

**How long will we keep your information?**

Files are stored for a maximum of 6 years

**Sharing and Disclosure to Third Parties**

We do not share your personal data with any third parties except in the following circumstances

* Applications for Legal-Aid are processed by Compass Resolution – therefore all financial evidence received, and applicable documentation is shared with them to facilitate a claim for Legal-Aid.
* All information gained through mediation is shared with our self-employed Personal Assistant, who herself is registered with the Information Data Commissioner and abides by Family Mediator Bath’s privacy policy. This is with the sole purpose of facilitating the administrative side of the process.
* Where there is a risk to children, when we have a duty to alert the relevant authorities (usually local authority social workers) as part of our overall responsibility to safeguard children
* Where you are provided with publicly funded (legally aided) family mediation and the Legal Aid Agency seeks to audit your files
* Where you request or authorise the disclosure of your personal details to a third party.
* Where we are requested to do so by any law enforcement agency, regulator, government authority where we believe this Is necessary to comply with a legal or regulatory obligation
* Where we transfer our assets and business to a third party. Should such a transfer arise, we will use all reasonable efforts to try and ensure that the organisation to which we transfer your information uses it in a manner consistent with this policy.

**Where the information is provided to service providers who perform functions on our behalf.**

* Hosting providers for the secure storage and transmission of your data
* Administration providers
* Legal and compliance consultants, such as external auditors
* Technology providers who assist in the development and management of our website

**Parents and Children**

If the person about whom we are holding information is below the age of 14 then we will need to seek consent from the parent or legal guardian to provide a direct service (where consent is required).  Once a person reaches age 14, we will seek consent direct from them to provide services.

**Subject Access/User Rights**

Your rights with regard to the data we hold on you are as follows.  You have the right to

* be informed of our use of your Personal Data
* access and/or to require the correction or erasure of your Personal Data
* block and/or object to the processing of your Personal Data
* not be subject to any decision based solely on automated processing of your Personal Data
* in limited circumstances, you may have the right to receive Personal Data in a format which may be transmitted to another entity.

If you have a complaint in relation to the processing of your data carried out under this Privacy Policy, you have the right to lodge a complaint with the Information Commissioner’s Office.

You may seek to exercise any of these rights by sending a written request to:

Shiel Macmillan, Proprietor

Family Mediator Bath, 8 Havory, Bath, BA1 6RR

**Information security**

We work to protect your personal information that we hold, its confidentially, integrity and availability by.

* regularly reviewing our information collection, storage and processing practices, including physical security measures, to guard against unauthorised access to systems
* restricting access to personal information to Staff and Volunteers subject to strict contractual confidentiality obligations including disciplinary action if they fail to meet these obligations
* ensuring we have a Security Information Policy in place which defines the measures we take to protect your personal information. We use a combination of technology and procedures to ensure that our paper and computer systems are protected, monitored and recoverable.
* We only use third party service providers where we are satisfied that they provide adequate security for your personal data.

**Compliance and cooperation with regulatory authorities**

We regularly review our compliance with our Privacy Policy.  If we receive formal written complaints, we will contact the person who made the complaint to follow up. We will work with the ICO to resolve any complaints regarding the transfer of personal data that we cannot resolve with our users directly.

**Changes**

Our Privacy Policy may change from time to time. We will not reduce your rights under this Privacy Policy without your explicit consent.

**How to Contact Us**

**E:mail:**info@familymediatorbath.com

**Phone:**01225 684504