

Client Charter



We want to ensure that all clients have a positive experience of using our services.

Access to our services

We offer a variety of advice channels to meet your needs including advice by telephone, face to face, webchat, email, virtual and home visits in certain circumstances. Full details of our services are published on our website citizensadvice.derbyshiredistricts.org.uk.

Our commitment to you. We 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 ask to see our Privacy Policy if you would like to know more.
- **Conflict of interest checks.** If we are giving you tailored advice or acting on your behalf, we will check for any conflict of interest. This helps us make sure our advice is impartial and in your best interests. We'll ask for the names of other people or organisations involved and check our records (including Casebook) and our local declarations/register of interests. If we identify a conflict, we may be able to give initial information only, or we may need to arrange for another adviser or another Citizens Advice office to help.
- **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. If you wish to complain, please ask for the leaflet which explains how to complain.

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 over).

In return, we expect you:

- To always treat our staff and volunteers with dignity and respect.

- 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 all the papers relevant to your case which your adviser asks for. This includes notification of court or tribunal dates etc.
- 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.

A full list of our client charter policies is available upon request via the [‘Contact us’](#) form on our website.

Policy type:	Mandatory, edited model policy
Oversight:	Service Delivery Subcommittee
Date approved:	August 2025
Review due:	2026-27, Q2

Appointments Policy

Policy type:	Optional, edited model policy
Oversight:	Service Delivery Subcommittee
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As an advice charity, we try to do the best that we can to provide a high quality service to as many clients as we can. Our service is always in high demand and many people in Citizens Advice Derbyshire Districts need our help. An important part of our service is to advise clients by appointment. Sometimes this is not necessary, as clients may take away information and be able to help themselves.

However, some clients need an appointment to discuss their problem in detail. Our service is provided by both volunteers and staff who try to do the best that they can to help clients with their problems.

When clients miss appointments without giving us notice, it can have a serious impact on the service because that appointment slot is unfilled. This reduces the number of clients that we can see and prevents us from helping more people. For that reason, 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 please telephone 0808 278 7954 as soon as you can.

1 - 10 minutes late

Please let us know as soon as you can that you are going to be slightly late – we will try to keep your appointment open so that you are still seen by an adviser.

10 - 15 minutes late

If you arrive more than 10 minutes late it may be that the adviser cannot help you because we will have given your appointment to someone else. It will depend very much on the circumstances of that particular day.

15 - 45 minutes late

If you arrive more than 15 minutes late we will have assumed that you were not going to attend your appointment. Also, because other clients will be scheduled to be seen, it is unlikely that we will be able to advise you and you will need to return on another day.

If you cannot attend your appointment

- **If you are not able to attend your appointment, please telephone 0808 278 7954 as soon as you can. This will allow us to give your “slot” to someone else.**
- If it is your first cancelled appointment then we will try and give you another appointment as soon as possible.

If you miss ONE appointment

We understand that life can be complicated and that unforeseen circumstances do arise.

If you are going to miss a single appointment please let us know and we will try to reschedule another one as soon as we can.

- Please note that we are so busy that it could be several weeks before another appointment is available. This is one of the reasons that we advise all clients to attend their appointments, especially if their problem is urgent.

If you do not contact us to let us know that you are not going to attend, we will note this on our computer system and assume that you no longer need our help.

If you miss TWO OR MORE appointments

If you have already missed one appointment we hope that you will make every effort to attend a second appointment. If you fail to attend your second appointment then we will assume that you no longer need our help.

Unless there are exceptional circumstances, if you subsequently contact us, it is unlikely that we will be able to offer you another appointment. You would need to access our walk-in service again. Alternatively, you might find it more convenient to seek advice from another organisation.

If you miss THREE OR MORE appointments, or continually refuse our advice

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 Derbyshire Districts needs to reschedule your appointment

Whilst we make every effort to ensure that you are seen when your appointment is scheduled, 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.

If we need to reschedule your appointment we undertake to:

- Contact you as soon as we become aware of the problem. We will always try to telephone you to let you know that there is a problem. This is why it is so important to leave us a telephone number or an alternative way of getting a message to you.
 - If we cannot reach you by telephone, we will leave a voicemail explaining that there is a problem, with a request that you contact us on 0808 278 7954 to rearrange your appointment.
 - If we haven't heard from you by the end of the day, and if there is enough notice, we will notify you in writing of the need to reschedule. However, in some instances this may not be possible, as the problem may have arisen at very short notice for example, if a volunteer has called in sick that morning.
 - If we need to reschedule, we will try to offer you another appointment at the same location, or one elsewhere if urgency dictates that this is necessary.

We appreciate that your problem may be very urgent and that you may have nowhere else to turn to – for that reason we apologise for any inconvenience that rescheduling your appointment causes you.

Comments, suggestions and complaints

If you have any kind of feedback about our service or our appointments policy, we want to hear it. Sometimes you may be very happy with the service. Sometimes you may not be happy or you may be very unhappy with our service. However, unless you tell us, it is often difficult for us to know.

If you have any comments, suggestions or complaints, then **please** write to us. This allows us to consider your feedback in detail and we will respond to you in writing. We will always try to resolve the issue to your satisfaction if we can – if we are able to, we will try to change the aspect of the service that you are unhappy with, or try to find another solution for you.

If you have problems writing or communicating any feedback, please attend our walk-in service and we will arrange for someone to take details of your feedback for further action.

Home visiting model policy

Policy type:	Optional, edited model policy
Oversight:	Service Delivery Subcommittee
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Citizens Advice Derbyshire Districts is happy to offer home visits to clients who are unable to visit our office in person or access services through an alternative channel.

However, we are only able to offer this service to people who are:

- unable to attend in person due to a disability or chronic illness
- the sole carer for an elderly, disabled, or chronically sick person

When you are provided with a home visit we will confirm arrangements with you in an email, text, letter or over the phone. We will confirm the date and time of the appointment, the name of the adviser and if they will be accompanied by another member of our team. We will also ask you questions about your home environment to enable us to perform a risk assessment.

The confirmation will also include details of any documents or information it would be helpful for you to have with you, so that the adviser can look at the best way of dealing with your problem.

When the adviser arrives you should ask them to produce their CADD identification. If an individual visits your home but is unable to provide confirmation that they are from the local Citizens Advice, you should not allow them access to your home.

If you have any concerns relating to the provision of a home visit or the conduct of a member of staff whilst in your home please contact our office at admin@ddcab.org.uk or 0808 146 7709.

How we handle unacceptable behaviour

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We understand your situation could be stressful and you might be frustrated - but our staff have the right to do their jobs without being treated badly.

Check what behaviour is unacceptable

We won't accept aggressive behaviour while helping you, for example:

- swearing
- abusive language
- discrimination like racism, sexism or homophobia
- being violent or threatening violence

We'll also tell you if you're taking up an unfair amount of time as this could stop us helping other people. For example, if you:

- keep demanding things in a short amount of time
- ask to speak to a specific member of staff when it's not possible, or contact lots of staff to try and get a different outcome
- keep changing issues or raising unrelated ones
- demand help for something outside our advice areas
- keep raising the same issue when we've already helped you or we can't help more
- ask for sensitive or confidential information we aren't allowed to share

- make lots of complaints without giving us the chance to resolve them, or make an unreasonable number of data protection rights requests

What we'll do if your behaviour is unacceptable

We'll give you a chance to change your behaviour, but if you continue we might:

- end the conversation
- limit how much time we spend on the phone with you
- stop helping you face to face and only help you by phone and email
- not reply to all your communications
- send letters and documents back to you
- only help you with certain issues

In very serious situations we might:

- stop helping you completely
- call the police

If we decide to stop helping you

If we decide to stop helping you it means you can't access Citizens Advice services - so we might not respond to any contact from you.

We'll give you a chance to change your behaviour before we stop helping you - unless your behaviour threatens the safety of our staff or other people.

We'll always try to tell you why we've stopped helping you.

If you think our decision is unfair

If your local Citizens Advice decides to stop helping you, you can appeal to the chair of your local Citizens Advice by email to admin@ddcab.org.uk or writing to Chair of Trustees, Citizens Advice Derbyshire Districts, Town Hall, Bank Road, Matlock, DE4 3NN.

If the national organisation decides to stop helping you, you can [appeal to the Citizens Advice Client Services team](#).