

Welfare Support Services Referral Checklist

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| **Please tick the box to confirm that verbal consent has been granted to record details of this referral** |

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| --- | --- | --- | --- | --- |
| Date:  Time: | Service (Regular/Reserve) | | | |
| Army | Navy | | RAF |
| Name: | Service number: | | | |
| Address: | Regiment: | | | |
| Postcode: | Proof of service: | | | |
| Contact number: | Referred by: | | | |
| E-mail: | DOB: | | NI No: \*\*\*\*\*\*\* | |
| Presenting issues:Benefits  Debt  Financial Assistance  Employment  Housing   Physical Health  Mental Health  Practical Support  Social Isolation  Other (provide detail)   Risk factors (please outline below) | | | | |
| Brief outline of situation: | | | | |

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| **Return this form to by email** [**gethelp@poppyscotland.org.uk**](mailto:gethelp@poppyscotland.org.uk)**, or by post to Poppyscotland,  New Haig House, Logie Green Road, Edinburgh EH7 4HR. Telephone number: 0131 550 1557** |

**How we use your personal data:**

Poppyscotland will use the information collected, or that you allow others to share with us, to:

* Find out if we can help – to check that you’re eligible for Poppyscotland assistance.
* Work out how we can help – to discuss and agree the right assistance with you.
* To help – to deliver the assistance we’ve discussed and agreed.

We will collect additional information about your personal, family and social circumstances, including about your finances, housing, health and well-being in order for us to identify the most appropriate support and assistance.

Please note that in some cases, we may need to balance your request against other legal rights and duties we have. For example, we may need to disclose your personal data where we are have a legal duty to do so or it in in your vital interests.

To assist us in helping you we may ask for – or you may give us – information about your physical or mental health, ethnic origin, genetic/biometric identifiers, religious, philosophical or political views, trade union membership, sexual orientation and any criminal convictions or offences.

This type of information is called “sensitive personal data” (also known as Special Categories of Personal Data).

This sensitive personal data will only be shared with support organisations that we think may be able to help you and your specific needs. You are under no obligation to provide this information, but, without it, this may limit the help we can provide.

Your information will be held for six years.

**Who we share your information with:**

In order for us to provide you with assistance most suitable for you and better target support we may share your information with other organisations. This could include the following, but is not limited to:-

* The Ministry of Defence, if we need to verify service in the Armed Forces.
* Charitable organisations such as regimental trusts or associations, to invite them to contribute towards any financial assistance.
* Companies that provide the goods or services requested.
* Local Authorities or Government Departments (such as the Department for Work and Pensions), to provide support around benefits or entitlements.

Who we contact and what information we share depends on what assistance is requested.

**Your Rights:**

If you don’t want us to contact certain organisations or to share certain information, tell us.

We’ll always try to help as much as we can, but the support we provide may be limited if we’re unable to use or share certain information.

If you no longer wish for us to process your information please contact: Jenna McCormick, Deputy Head of Welfare Services, on [j.mccormick@poppyscotland.org.uk](mailto:j.mccormick@poppyscotland.org.uk) or 0131 550 1558.

Under GDPR you have certain rights including the right to access the personal data we hold about you and a right to object to processing or erasure of personal data. For more information about these rights please see our Privacy Policy (link provided below).

**How you can find out more:**

There’s more detail in our leaflet: “How we use your personal information.” You can also read our Privacy Promise at: [www.poppyscotland.org.uk/about-us/our-privacy-promise-and-policy/](http://www.poppyscotland.org.uk/about-us/our-privacy-promise-and-policy/) , or speak with our representative.

You can also contact the Information Commissioners Office for more information, or if you wish to make a complaint, please visit [www.ico.org.uk](http://www.ico.org.uk).

**Can we use and share your personal information?**

If you consent to us using your information, and sharing your information in the ways set out above, please tick the appropriate boxes and provide your details below:

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| --- | --- |
| **How can we contact you?** | Phone  Email Letter |

**Name: Signature:**

**Date:**

If you are completing this application on someone else’s behalf, please also provide the following:

|  |  |
| --- | --- |
| Name and organisation |  |
| Contact details |  |
| Job title / relationship to the client |  |

To confirm you have the applicant’s permission to give us their information, tick here 