

Process Id# :: 1432
Process Name :: Issue Pension Estimate
Date Last Updated :: 24/07/2019

Description ::

Calculate an estimate of employees' pension benefits to assist in making decisions regarding their retirement.

Article 30 Process as carried out by the NSSO as a processor on the instruction of the PSB ::

As required under Article 30 (2) of the GDPR ::

Data Stage	Process - 5.2.5.1 Pension Estimate		Owner	Storage Location	Personal / Sensitive Data	Data Items
Data Capture	1	Retirements receive request for Pension Estimate via email/post or CMS	Officer	Outlook Post CMS	Personal	Name, Address, PPSN, Exit date
Data Usage	1a	Retirements Advisor raises case if request received by email or post and attaches request	Officer	CMS Outlook DMS	Personal	Name, Address, PPSN, Exit date
Data Transfer	2	If retirement date greater than 6 months away then retirements advisor directs officer to self-service moddler via email/post	Retirements (Preparer)	Outlook Mailing Bin	Personal	Name, Address, PPSN, Exit date
Data Capture	3	Retirements advisor gathers service and salary details from HRMS	Retirements (Preparer)	HRMS	Personal	Name, PPSN, Service Details and Salary
Data Transfer	4	Retirements advisor populates Pension Estimate Calculator	Retirements (Preparer)	H:Drive	Personal	Name, PPSN, Service Details, Salary and Pension amount
Data Storage	5	Retirements Advisor adds Calculator to case notes	Retirements (Preparer)	CMS	Personal	Name, PPSN, Service Details, Salary and Pension amount
Data Transfer	6	Retirements advisor assigns case to Analyst for 4 Eye Check	Retirements (Preparer)	CMS	Personal	Name, PPSN, Service Details, Salary and Pension amount

Data Capture	7	Retirements Analyst checks steps 3 and 4	Retirements (Analyst)	CMS	Personal	Name, PPSN, Service Details, Salary and Pension amount
Data Usage	8	Retirements Analyst adds note to case confirming 4 Eye	Retirements (Analyst)	CMS	Personal	Name, PPSN, Service Details, Salary and Pension amount
Data Transfer	9	Retirements Analyst assigns case to Advisor	Retirements (Analyst)	CMS	Personal	Name, PPSN, Service Details, Salary and Pension amount
Data Transfer	10	Retirements advisor replies to customer with details on their pension entitlements.	Retirements (Preparer)	Outlook Mailing Bin	Personal	Name, Address, Pension amount
Data Storage	11	Retirements Advisor adds all documentation to case notes and uploads to DMS	Retirements (Preparer)	CMS DMS	Personal	Name, PPSN, Address Service Details, Salary and Pension amount
Data Transfer	12	Retirements Advisor closes case	Retirements (Preparer)	DMS	Personal	Name, PPSN, Address Service Details, Salary and Pension amount