

Process Id# :: 1458
Process Name :: Verify Entitlement on Resignation/End of Contract
Date Last Updated :: 24/07/2019

Description ::

To establish whether the officer has an entitlement to a preserved pension or if they should receive a refund of scheme contributions.

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 - 5.2.3d.1 Verify Entitlement on Resignation End of Contract		Owner	Storage Location	Personal / Sensitive Data	Data Items
Data Transfer	1	From process 4.3.1b.6, Retirements Advisor receives a task with instruction to check if an officer has served the vesting period (2 years of service)	Retirements	CMS	Personal	Name, PPSN,
Data Capture	1a	Retirements Advisor views officer's notice of resignation	Retirements	CMS	Personal	Name, PPSN,
Data Usage	1b	Retirements Advisor views Officer's service details on HRMS	Retirements	HRMS	Personal	Name, PPSN, Start Date, Pension scheme, Service Details
Data Usage	1c	Retirements Advisor enters dates of service into calculator template to calculate length of service. Calculations are added to case notes. If greater than 2 years go to Step 5	Retirements	H:Drive CMS	Personal	Name, PPSN, Start Date, Pension scheme, Service Details
Data Usage	2	Retirements advisor has calculated length of service is less than 2 years	Retirements	CMS	Personal	Name, PPSN, Start Date, Pension scheme, Service Details
Data Usage	2a	If officer indicated on notice of resignation that they want a refund of pension contributions then go to Step 3.	Retirements	CMS	Personal	Name, PPSN, Start Date, Pension scheme, Service Details

Data Usage	2b	If officer indicated on notice of resignation that they do not want a refund of pension contributions go to Step 4	Retirements	CMS	Personal	Name, PPSN, Start Date, Pension scheme, Service Details
Data Usage	3	Retirements advisor adds note on CMS to indicate employee wants a refund.	Retirements	Outlook	Personal	Name, PPSN, Start Date, Pension scheme, Service Details
Data Usage	3a	Retirements advisor closes HRMS pension page for employee and adds note to pension page indicating refund occurred, referencing CMS case number	Retirements	HRMS	Personal	Name, PPSN, Start Date, Pension scheme, Service Details
Data Transfer	3b	Advisor verbally request 4 eye check from Peer	Retirements (Preparer)	Verbal	Personal	Name, Case ID, Task No
Data Capture / Data usage	3c	Peer checks steps 3a - 3b and adds note to case confirming 4 Eye	Retirements (Peer Checker)	HRMS CMS	Personal	Name, PPSN, Start Date, Pension scheme, Service Details
Data Usage	4	Retirements advisor closes HRMS pension page for employee and adds note to pension page indicating no refund occurred, referencing CMS case number	Retirements	HRMS	Personal	Name, PPSN, Start Date, Pension scheme, Service Details
Data Transfer	4a	Advisor verbally request 4 eye check from Peer	Retirements (Preparer)	Verbal	Personal	Name, Case ID, Task No
Data Capture / Data usage	4b	Peer checks steps 4a and adds note to case confirming 4 Eye	Retirements (Peer Checker)	HRMS CMS	Personal	Name, PPSN, Start Date, Pension scheme, Service Details
Data Transfer	5	Retirements advisor creates linked case in CMS to process leaver statement for employee	Retirements	CMS	Personal	Name, PPSN, Start Date, Pension scheme, Service Details