

## **Privacy Information Notice for SBS Members**

This 'privacy notice' explains what personal information the Trustees hold about you as a member of the Staff Benefits Scheme. It explains why we hold this information, what we do with it, how long we keep it for and if we share it with third parties. The Trustees are a 'data controller' of your personal information under data protection law. This means it is the Trustees who determine the manner and purpose for which your personal information is used.

We collect and use your personal data for a number of purposes. For example, we need it to calculate your pension benefits and those of your beneficiaries.

We also use individual member information to help us understand the make-up of our membership and to help us to value the assets and liabilities of the Scheme.

The table below describes in full the information we may hold about you, what we need it for, where we get it from and who we share it with. The precise information we hold will vary slightly for each member of the Scheme.

As you will see, the Trustees share your personal information with their administrators and advisers. No personal information is at present transferred outside the European Economic Area. Should, however, that occur in certain circumstances in the future, the parties involved will ensure that appropriate legal safeguards are in place.

Under data protection law, we can only hold and use your personal information if we have a legal basis for doing so. In most cases, our legal basis for holding personal data about you is that we have a legal obligation to use this data to ensure you receive the benefits you have been promised. We must by law provide benefits in line with the Scheme's governing documents and must also meet other legal requirements when looking after the Scheme.

In certain circumstances, we may also use your personal information on the lawful basis of our legitimate interest in properly looking after the Scheme, or (as the Scheme's sponsoring employer) the University's legitimate interests in understanding the makeup of the Scheme and its obligations to it.

Different lawful bases apply to 'special' or sensitive personal data. If we need to use information about your health (or other very personal and private information), we may ask your consent. However, sometimes there may be reasons of public interest or law that enable us to use this information without consent, for example, for the purposes of making a determination in connection with your eligibility for the Scheme or with any benefits that may be payable under the Scheme. If we have asked for and you have given us your consent, you can withdraw this at any time by contacting the Trustees

Pension benefits are paid over a long period and your right to benefits under the Scheme is based on information which may go back many

years. Our policy is, therefore, to retain information relating to you until your membership of the Scheme ends.

Once your membership ends, we may decide to delete some of the data held in relation to you. However, information may be held in respect of former members for longer where we consider it appropriate in order to ensure the Scheme pays the correct benefits and to deal with any queries relating to your benefits which may arise after that time.

We review our retention periods for personal data on a regular basis. You have rights in relation to your personal information; these may include a right to have access to your data, to correct any mistakes in the information we hold about you, and to object to the way in which we use your data. If you have any queries about your rights or about this notice, you can contact the Trustees via Andrew Mills, Hymans Robertson LLP, 20 Waterloo Street, Glasgow, G2 6DB.

If you are unhappy with the how the Trustees have responded to your queries, you have the right to lodge a complaint with the Information Commissioner's Office. You can read more about how to contact the Information Commissioner, and your rights under data protection law, at <https://ico.org.uk/global/contact-us/>.

We may change this privacy notice from time to time. You should check this privacy notice from time to time to ensure you are aware of the most recent version. Updated versions of this privacy notice will be available on your Scheme administration online account (Prism) and at the University of Edinburgh's pension webpages at <https://www.uoesbspensions.co.uk/resources/>.

*The Trustees of the University of Edinburgh Staff Benefits Scheme*

*This Privacy Notice was last updated in January 2025*

<b>The information we hold</b>	<b>What we need it for</b>	<b>Where we get it from</b>	<b>Third Parties we may share it with</b>
Your name, address, personal e-mail address, work address, home address.	To contact you.  To process payments and benefits to you.	You, when you applied to join the Scheme Or The University's central database.	Pension Scheme Administrator. Pension Scheme Actuary. Life Assurance Provider.
The start date of your pension scheme membership.	To calculate, process and provide payment and benefits to you.	You, when you applied to join the Scheme Or The University's central database.	Pension Scheme Administrator. Pension Scheme Actuary. Life Assurance Provider.
Bank account details	To pay your pension benefits.	You, when you completed your retirement application. Or The University's central database when you left the Scheme.	Pension Scheme Administrator.
National Insurance Number.	To identify you to HMRC upon payment of your pension benefit.	The University's central database or From correspondence from HMRC.	HMRC Pension Scheme Administrator.
Payroll records, including details of your current salary and salary history; pension scheme contributions and any additional voluntary contributions you may have set up.	To calculate, process and pay your pension benefits.  To maintain a record of your pension contributions.	The University's central database.	HMRC Pension Scheme Administrator.
Your expression of wishes details.	To allow us to pay benefits to your named beneficiaries in the event of your death.	You, when you asked us to update the details we held previously.	Pension Scheme Administrator.
Details of statutory and unpaid leave that has an effect on your pensionable service or contributions	To calculate the correct level of pension benefit.	The University's central database.	Pension Scheme Administrator. Life Assurance Provider.
Information and correspondence about flexible retirement applications	To keep records of your flexible working request	You, when you make a flexible retirement application.	Pension Scheme Administrator.

	To comply with our legal obligations	The University, in response to your application.	
Your date of birth, age and gender	To determine pension eligibility.	From you when you applied joined the University.	Pension Scheme Administrator. Pension Scheme Actuary. Life Assurance Provider.
Your marriage or civil partnership status	To provide beneficiary benefits upon your death.	You, when you asked us to update the details we held previously.	Pension Scheme Administrator. Pension Scheme Actuary
Your dependants	To determine eligibility for beneficiary benefits payable upon your death.	You, when you asked us to update the details we held previously.	Pension Scheme Administrator.
Information about medical or health conditions.	To pay ill health retirement benefits.	For information you may provide at any time during your employment.  From information provided by your GP/health specialist or Occupational Health with your consent.	Pension Scheme Administrator. Scheme's Independent Medical Adviser.
Correspondence to and from you (electronic or otherwise)	In relation to any aspect of your Scheme membership.	From you or generated by the Scheme in response to your correspondence.	Pension Scheme Administrator.