

Privacy Notice for University of Edinburgh Staff Benefit Scheme ('the Scheme')

This 'Privacy Notice' explains what personal information the Trustee of the University of Edinburgh Staff Benefits Scheme ('the Trustee') hold about you as a member of the 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 Trustee is a 'data controller' of your personal information under data protection law. This means it is the Trustee who determines 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.

The Trustee shares 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 category 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 Trustee.

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.

Information may be held in respect of former members 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 your membership has ended.

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 a complaint about how we have handled your personal information, please refer to the Data Protection Complaints Procedure below.

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 the Scheme's website, PRISM at <https://www.uoesbspensions.co.uk/resources/>

If you have any queries about your rights or about this notice, you can contact the Secretary to the Trustee by writing to Hymans Robertson LLP, 20 Waterloo Street, Glasgow, G2 6DB. Alternatively, you can get in touch via email (uoe@hymans.co.uk).

Data Protection Complaints Procedure

You have the right to complain directly to us if you believe that we have not handled your personal data in accordance with data protection law. This includes concerns about how your personal data has been collected, used, stored, shared, kept accurate, or protected.

You may raise a data protection complaint with us by writing to the Secretary to the Trustee at Hymans Robertson LLP, 20 Waterloo Street, Glasgow, G2 6DB or via email (uoe@hymans.co.uk). You do not need to use specific wording or refer to legislation when making your complaint. If it is clear that your concern relates to how we have handled your personal data, we will treat it as a data protection complaint.

Once we receive your data protection complaint, we will acknowledge receipt of your complaint within 30 days of receiving it.

After acknowledging your complaint, we will take appropriate steps to respond without undue delay. This includes making appropriate enquiries to understand the issues raised, reviewing relevant information, and keeping you informed about the progress of your complaint while it is being considered.

Once we have completed our consideration of your complaint, we will inform you of the outcome without undue delay. Our response will explain the outcome of our assessment and any steps we have taken or propose to take as a result.

If you are not satisfied with how we have handled your data protection complaint, you have the right to raise your concerns with the Information Commissioner's Office (ICO). The ICO generally expects individuals to raise their complaint with us first before contacting the ICO. 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/>.

The Trustee of the University of Edinburgh Staff Benefits Scheme

This Privacy Notice was last updated in May 2026

The information we hold	What we need it for	Where we get it from	Third Parties we may share it with
Your name, address, personal e- mail address, work address, home address.	<p>To contact you.</p> <p>To process payments and benefits to you.</p> <p>To connect with the Pensions Dashboard.</p>	<p>You, when you applied to join the Scheme</p> <p>Or</p> <p>The University's central database.</p>	<p>Pension Scheme Administrator. Pension Scheme Actuary. Life Assurance Provider. Pensions Dashboard integrated service provider (PDISP).</p>
The start date of your pension scheme membership.	<p>To calculate, process and provide payment and benefits to you.</p> <p>To connect with the Pensions Dashboard.</p>	<p>You, when you applied to join the Scheme</p> <p>Or</p> <p>The University's central database.</p>	<p>Pension Scheme Administrator. Pension Scheme Actuary. Life Assurance Provider. PDISP.</p>
Bank account details	<p>To pay your pension benefits.</p>	<p>You, when you completed your retirement application.</p> <p>Or</p> <p>The University's central database when you left the Scheme.</p>	<p>Pension Scheme Administrator.</p>
National Insurance Number.	<p>To identify you to HMRC upon payment of your pension benefit.</p> <p>To connect with the Pensions Dashboard.</p>	<p>The University's central database or</p> <p>From correspondence from HMRC.</p>	<p>HMRC</p> <p>Pension Scheme Administrator.</p> <p>PDISP</p>
Payroll records, including details of your current salary and salary history; pension scheme contributions and any additional voluntary contributions you may have set up.	<p>To calculate, process and pay your pension benefits.</p> <p>To maintain a record of your pension contributions.</p>	<p>The University's central database.</p>	<p>HMRC</p> <p>Pension Scheme Administrator.</p>

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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 To comply with our legal obligations	You, when you make a flexible retirement application. The University, in response to your application.	Pension Scheme Administrator.
Your date of birth, age and gender	To determine pension eligibility. To connect with the Pensions Dashboard.	From you when you applied joined the University.	Pension Scheme Administrator. Pension Scheme Actuary. Life Assurance Provider. PDISP
Your marriage or civil partnership status	To provide beneficiary benefits upon your death. To connect with the Pensions Dashboard.	You, when you asked us to update the details we held previously.	Pension Scheme Administrator. Pension Scheme Actuary PDISP
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.

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Information about medical or health conditions.	To pay ill health retirement benefits.	<p>For information you may provide at any time during your employment.</p> <p>From information provided by your GP/health specialist or Occupational Health with your consent.</p>	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.