

Type of Personal Data	Who is the Data Subject?	Reason for BW processing the data
Name (including former names) And/ or Date of Birth	☒ Active employees ☒ Former employees	☒ Issuing communications and information to data subject ☒ Responding to member and third party queries and disputes ☒ Reporting of benefit selections to providers ☒ Ascertaining eligibility of benefits ☒ Reporting of benefits and costs to client payroll team/provider ☒ Demonstrating past compliance with duties ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
Membership number or Individual reference number	☒ Active employees ☒ Former employees	☒ Issuing communications and information to data subject ☒ Responding to member and third party queries and disputes ☒ Reporting of benefit selections to providers ☒ Ascertaining eligibility of benefits ☒ Reporting of benefits and costs to client payroll team/provider ☒ Demonstrating past compliance with duties ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
Gender (including details of any gender recognition certificate)	☒ Active members ☒ Former employees	☒ Issuing communications and information to data subject ☒ Responding to member and third party queries and disputes ☒ Reporting of benefit selections to providers ☒ Ascertaining eligibility of benefits ☒ Reporting of benefits and costs to client payroll team/provider ☒ Demonstrating past compliance with duties ☐ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
Marital status (including details of any certificates regarding marital status, such as a marriage certificate, civil partnership certificate, decree absolute or final order)	☒ Active members ☒ Former employees	☒ Issuing communications and information to data subject ☒ Responding to member and third party queries and disputes ☒ Reporting of benefit selections to providers ☒ Ascertaining eligibility of benefits ☒ Reporting of benefits and costs to client payroll team/provider ☒ Demonstrating past compliance with duties ☐ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
Home address (including previous home addresses) /other contact addresses	☒ Active members ☒ Former employees	☒ Issuing communications and information to data subject ☒ Responding to member and third party queries and disputes ☒ Reporting of benefit selections to providers ☒ Ascertaining eligibility of benefits ☒ Reporting of benefits and costs to client payroll team/provider ☒ Demonstrating past compliance with duties ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
Other contact details (including telephone numbers and email addresses)	☒ Active members ☒ Former employees	☒ Issuing communications and information to data subject ☒ Responding to member and third party queries and disputes ☒ Reporting of benefit selections to providers ☐ Ascertaining eligibility of benefits ☒ Reporting of benefits and costs to client payroll team/provider ☒ Demonstrating past compliance with duties ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
Title	☒ Active members ☒ Former employees	☒ Issuing communications and information to data subject ☒ Responding to member and third party queries and disputes ☒ Reporting of benefit selections to providers ☐ Ascertaining eligibility of benefits ☒ Reporting of benefits and costs to client payroll team/provider ☒ Demonstrating past compliance with duties ☐ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
Employment history For example, whether a member works part time or full time, dates of starting and leaving employment, periods of absence, job title / category, details of	☒ Active members ☒ Former employees	☒ Issuing communications and information to data subject ☒ Responding to member and third party queries and disputes ☒ Reporting of benefit selections to providers ☒ Ascertaining eligibility of benefits ☒ Reporting of benefits and costs to client payroll team/provider ☒ Demonstrating past compliance with duties

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employer(s)		☐ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
Salary/ remuneration data	☒ Active members ☒ Former employees	☒ Issuing communications and information to data subject ☒ Calculation of benefit costs ☒ Calculation to ensure benefit selections do not cause conflict with National Minimum Wage limits ☒ Responding to member and third party queries and disputes ☒ Reporting of benefit selections to providers ☒ Ascertaining eligibility of benefits ☒ Reporting of benefits and costs to client payroll team/provider ☒ Demonstrating past compliance with duties ☐ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
Business identifier (including department, grade, cost centre Unit or department, business unit)	☒ Active members ☒ Former employees	☒ Issuing communications and information to data subject ☒ Calculation of benefit costs ☐ Calculation to ensure benefit selections do not cause conflict with National Minimum Wage limits ☒ Responding to member and third party queries and disputes ☒ Reporting of benefit selections to providers ☒ Ascertaining eligibility of benefits ☒ Reporting of benefits and costs to client payroll team/provider ☒ Demonstrating past compliance with duties ☐ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
Business location	☒ Active members ☒ Former employees	☒ Issuing communications and information to data subject ☒ Calculation of benefit costs ☐ Calculation to ensure benefit selections do not cause conflict with National Minimum Wage limits ☒ Responding to member and third party queries and disputes ☒ Reporting of benefit selections to providers ☒ Ascertaining eligibility of benefits ☒ Reporting of benefits and costs to client payroll team/provider ☒ Demonstrating past compliance with duties ☐ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing
Tax and National Insurance information This includes the following data ☒ National Insurance number ☒ PAYE details ☐ Lifetime Allowance Protections	☒ Active members ☒ Former employees	☒ Issuing communications and information to data subject ☐ Calculation of benefit costs ☐ Calculation to ensure benefit selections do not cause conflict with National Minimum Wage limits ☒ Responding to member and third party queries and disputes ☒ Reporting of benefit selections to providers ☒ Ascertaining eligibility of benefits ☒ Reporting of benefits and costs to client payroll team/provider ☒ Demonstrating past compliance with duties ☒ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing ☒ Creating secure access credentials to Barnett Waddingham services
Passed Probation	☒ Active members ☒ Former employees	☒ Issuing communications and information to data subject ☐ Calculation of benefit costs ☐ Calculation to ensure benefit selections do not cause conflict with National Minimum Wage limits ☒ Responding to member and third party queries and disputes ☒ Reporting of benefit selections to providers ☒ Ascertaining eligibility of benefits ☒ Reporting of benefits and costs to client payroll team/provider ☒ Demonstrating past compliance with duties ☐ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing ☐ Creating secure access credentials to Barnett Waddingham services
Benefit Level	☒ Active members ☒ Former employees	☒ Issuing communications and information to data subject ☒ Calculation of benefit costs ☒ Calculation to ensure benefit selections do not cause conflict with National Minimum Wage limits ☒ Responding to member and third party queries and disputes ☒ Reporting of benefit selections to providers ☒ Ascertaining eligibility of benefits ☒ Reporting of benefits and costs to client payroll team/provider

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		☒ Demonstrating past compliance with duties ☐ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing ☐ Creating secure access credentials to Barnett Waddingham services
Special categories of personal data ☐ Racial or ethnic origin ☐ Political opinion ☐ Religious or Philosophical views ☐ Trade union membership ☐ Genetic data ☐ Biometric data ☒ Health data ☐ Data concerning a person's sex life or sexual orientation ☐ Data relating to criminal convictions and offences	☒ Active members ☒ Former employees	☐ Issuing communications and information to data subject ☒ Calculation of benefit costs ☐ Calculation to ensure benefit selections do not cause conflict with National Minimum Wage limits ☒ Responding to member and third party queries and disputes ☒ Reporting of benefit selections to providers ☒ Ascertaining eligibility of benefits ☒ Reporting of benefits and costs to client payroll team/provider ☒ Demonstrating past compliance with duties ☐ Establishing the identity of the data subject and ensuring compliance with duties relating to anti-money laundering and terrorist financing ☐ Creating secure access credentials to Barnett Waddingham services