EC Health and Protection – Data map

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 members ☒ Employees who will or may receive benefits from insured group Risk or Healthcare policies(e.g on the death of a member)	☒ Issuing communications and information to data subject ☒ Responding to client, member and third party queries and disputes ☒ Calculation and payment of benefits (e.g pensions, lump sums) ☒ Ascertaining eligibility of benefits ☒ Preparing scheme accounts ☒ Managing medical underwriting and claims ☒ Obtaining quotes for insurance products ☒ Purchasing insurance products ☒ Demonstrating past compliance with duties
Membership number or individual reference number	☒ Active members ☒ Employees who will or may receive benefits from insured group Risk or Healthcare policies(e.g on the death of a member) scheme	☒ Issuing communications and information to data subject ☒ Responding to client, member and third party queries and disputes ☒ Calculation and payment of benefits (e.g pensions, lump sums) ☒ Ascertaining eligibility of benefits ☒ Preparing scheme accounts ☒ Managing medical underwriting and claims ☒ Obtaining quotes for insurance products ☒ Purchasing insurance products ☒ Demonstrating past compliance with duties
Gender (including details of any gender recognition certificate)	☒ Active members ☒ Employees who will or may receive benefits from insured group Risk or Healthcare policies(e.g on the death of a member)	☐ Issuing communications and information to data subject ☒ Responding to client, member and third party queries and disputes ☒ Calculation and payment of benefits (e.g pensions, lump sums) ☒ Ascertaining eligibility of benefits ☒ Preparing scheme accounts ☒ Managing medical underwriting and claims ☒ Obtaining quotes for insurance products ☒ Purchasing insurance products ☒ Demonstrating past compliance with duties
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 ☒ Employees and family members who will or may receive benefits from insured group Risk or Healthcare policies(e.g on the death of a member)	☐ Issuing communications and information to data subject ☒ Responding to client, member and third party queries and disputes ☒ Calculation and payment of benefits (e.g dependant pensions, lump sums) ☒ Ascertaining eligibility of benefits (e.g dependant pensions, lump sums) ☒ Preparing scheme accounts ☒ Managing medical underwriting and claims ☒ Obtaining quotes for insurance products ☒ Purchasing insurance products ☒ Demonstrating past compliance with duties
Home address (including previous home addresses) /other contact addresses	☒ Active members ☒ Employees and family members who will or may receive benefits from insured group Risk or Healthcare policies(e.g on the death of a member)	☒ Issuing communications and information to data subject (Healthcare related benefits) ☒ Responding to member and third party queries and disputes (via client and insurer) ☐ Calculation and payment of benefits (e.g , lump sums) ☒ Managing medical underwriting and claims ☒ Purchasing insurance products ☒ Demonstrating past compliance with duties
Other contact details (including telephone numbers and email addresses)	☒ Active members ☒ Employees and family members who will or may receive benefits from insured group Risk or Healthcare policies(e.g on the death of a member)	☒ Issuing communications and information to data subject ☒ Responding to member and third party queries and disputes ☐ Calculation and payment of benefits (e.g dependant pensions, lump sums) ☐ Ascertaining eligibility of benefits (e.g dependant pensions, lump sums) ☐ Preparing scheme accounts ☒ Managing medical underwriting and claims ☐ Obtaining quotes for insurance products ☐ Purchasing insurance products ☒ Demonstrating past compliance with duties
Information regarding periods of pensionable service (including periods of absence)	☒ Active members ☒ Employees who will or may receive benefits from insured group Risk or Healthcare policies(e.g on the death of a member)	☒ Issuing communications and information to data subject ☒ Responding to member and third party queries and disputes ☒ Calculation and payment of benefits (e.g dependant's pensions, lump sums) ☒ Ascertaining eligibility of benefits (e.g in event, ill health or death) ☒ Preparing scheme accounts ☒ Managing medical underwriting and claims

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		☒ Obtaining quotes for insurance products ☒ Purchasing insurance products ☒ Demonstrating past compliance with duties
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 employer(s)	☒ Active members ☒ Employees who will or may receive benefits from insured group Risk or Healthcare policies(e.g on the death of a member)	☐ Issuing communications and information to data subject ☒ Responding to client, member and third party queries and disputes ☒ Calculation and payment of benefits (e.g dependant pensions, lump sums) ☒ Ascertaining eligibility of benefits (e.g dependant pensions, lump sums) ☒ Preparing scheme accounts ☒ Managing medical underwriting and claims ☒ Obtaining quotes for insurance products ☒ Purchasing insurance products ☒ Demonstrating past compliance with duties
Salary/ remuneration data	☒ Active members ☒ Employees who will or may receive benefits from insured group Risk policies(e.g on the death of a member)	☒ Issuing communications and information to data subject ☒ Responding to client, member and third party queries and disputes ☒ Calculation and payment of benefits (e.g dependant pensions, lump sums) ☒ Ascertaining eligibility of benefits (e.g dependant pensions, lump sums) ☒ Preparing scheme accounts ☒ Managing medical underwriting and claims ☒ Obtaining quotes for insurance products ☒ Purchasing insurance products ☒ Demonstrating past compliance with duties
Tax and National Insurance information This includes the following data ☒ National Insurance number ☐ PAYE details ☒ Lifetime Allowance Protections	☒ Active members ☒ Employees who will or may receive benefits from insured group Risk policies(e.g on the death of a member)	☒ Issuing communications and information to data subject ☒ Responding to client, member and third party queries and disputes ☒ Calculation and payment of benefits (e.g, lump sums) ☒ Ascertaining eligibility of benefits (e.g dependant pensions, lump sums) ☒ Preparing scheme accounts ☒ Managing medical underwriting and claims ☒ Obtaining quotes for insurance products ☒ Purchasing insurance products ☒ Demonstrating past compliance with duties
Birth/adoption certificate details Death certificate Details	☒ Active members ☒ Employees who will or may receive benefits from insured group Risk policies(e.g on the death of a member)	☐ Issuing communications and information to data subject ☒ Responding to client, member and third party queries and disputes ☒ Calculation and payment of benefits (e.g dependant pensions, lump sums) ☒ Ascertaining eligibility of benefits (e.g dependant pensions, lump sums) ☐ Preparing scheme accounts ☒ Managing medical underwriting and claims ☐ Obtaining quotes for insurance products ☐ Purchasing insurance products ☒ Demonstrating past compliance with duties