Annex A - Data Processing

The Contracting shall comply with any further written instructions with respect to processing by the Authority.
Any such further instructions shall be incorporated into this Schedule.

Description	Details
Subject matter of the processing	Pension Credit Claims; Agent gathers data and uses appropriate DWP tool to confirm whether customer is likely to qualify for benefit and if so warm transfers through to DWP. Inappropriate calls to be signposted to other service providers.
Duration of the processing	Processing will take place from the date of contract signature on 1st August 2018 (**insert agreed contract start date**), and will operate through to contract termination on 31st July 2021 (**insert contract term end date** with possibility of a contract extension of up to 12 months).
Nature and purposes of the processing	• Processing is for DWP purposes. DWP will rely on powers derived from S3 of the Social Security Act 1998 • External suppliers will be required to comply with the provisions of the Data Protection Act and the requirements of the GDPR (General Data Protection Regulations) after it comes into effect on 25 May 2018 and maintain a record of processing activities under its responsibility. • Some data is shared across government and with authorised bodies (i.e. Local council). This is through system access sharing as opposed to direct contact. • The processing activities will include call recording. Customers will be notified of call recording prior to telephony agent interaction. • The purpose of the processing is to establish entitlement to benefit. • Establish the name and NINO of the customer, if NINO not know then ask for Date of Birth. These questions are required to protect the customer's information as required by the data protection act • Undertake a Pension credit eligibility calculation using the Intranet calculator • Agent checks DWP systems (Income Support Computer System) in respect of customer to establish that they are not in receipt of pension credit • If customer has a partner, Agent checks ISCS in respect of partner to establish that they are not in receipt of pension credit • If customer or partner are in receipt of pension credit the agent uses security guidelines to validate customer's identification (to comply with Data Protection Act), If the customer is likely to qualify agent will explain that the call will be transferred to the pension centre for the claim to be taken and processed. • If the customer/ partner is not in receipt, transfer the call to the relevant pension centre and advise the

	pension centre agent that Security questions have not been asked, and that system has been checked to confirm none receipt of Pension Credit. • Customers may contact this service line to check out general eligibility rules and what income and capital might be disregarded for Pension credit purposes, they may also ask questions about how other Social Security benefits are affected by pension credit. • Calls regarding recent correspondence between themselves and DWP, this may be in respect of evidence that has been requested from the customer to support their application. • Some callers may wish to report a change in their circumstances, most of these calls will go directly to the appropriate Pensions Centre, but some may be delivered to the Supplier's agents. Agents are not able to accept or process changes of circumstances and must direct the customers to the appropriate route.
Type of Personal Data and Special Categories of Personal Data	Caller's details and details of those the caller wishes to make a claim for such as name, address, date of birth, NI number, telephone number, pay, health. Special category data is discussed; Are you registered blind? And this is a yes or no answer. Also when asking if the customer gets any DLA AA or PIP this is when a customer may inform or explain their health condition although this is not required to be gathered for the PC Claim
Categories of Data Subject	DWP Customers/claimants, Appointees
Plan for return and destruction of the data once the processing is complete UNLESS requirement under European Union or European member state law to preserve that type of data	Rolling 14 month retention from date of telephone call then securely transfer back to DWP via a secure portal in line with SoR at 7.3e, 7.3f, 14.5 & destroyed by supplier as per SoR 6.5 and in line with DWP sustainability and security policy and to meet current legislation.