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| **Preparation checklist** | **Relevant guidance** | **Your status comments** | **Complete** |
| **Start now: general tasks** | | | |
| Establish pensions dashboards as a regular agenda item at board meetings | Overview – your role and legal duties |  |  |
| Check your ‘connect by’ date | When your scheme needs to connect with dashboards |  |  |
| Discuss pensions dashboards with your administrator and other relevant parties (such as software provider, actuary, legal adviser, employer, additional voluntary contribution provider) to develop and agree practical delivery plan according to your scheme-specific situation | Overview – working with advisers and providers |  |  |
| Explore your route to connection – either building own interface or using a (new or existing) third-party solution | Connecting to pensions dashboards – choosing a digital interface |  |  |
| Decide when to connect your scheme, taking relevant guidance into consideration, and assessing the risks associated with your decision | When your scheme needs to connect with dashboards |  |  |
| If required, appoint new suppliers or revise contracts for existing suppliers | Connecting to pensions dashboards – choosing a digital interface |  |  |

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| **Preparation checklist** | **Relevant guidance** | **Your status comments** | **Complete** |
| **Start now: data tasks to match people with their pensions** | | | |
| Understand what personal data you will receive from the digital architecture to help you match members to their pensions | Matching people with their pensions |  |  |
| Assess the quality and digital accessibility of personal data in your records | Matching people with their pensions |  |  |
| Consider which data items you will use to confirm matches are made or that there are possible matches | Matching people with their pensions |  |  |
| Where your member personal data needs improving, put plans in place to deliver the improvements | Matching people with their pensions |  |  |

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| **Preparation checklist** | **Relevant guidance** | **Your status comments** | **Complete** |
| **Start now: data tasks to provide information to members** | | | |
| Understand what data you will need to return to members and by when | Information to provide to members |  |  |
| Assess the quality and digital accessibility of the data that will be provided to your members | Information to provide to members |  |  |
| Consider how you will calculate the value data so that it is provided in line with dashboard requirements – calculated in line with ASTM1 or scheme rules, and sufficiently recent | Information to provide to members |  |  |
| Where value data is not in line with dashboard requirements, put plans in place to ensure you can meet your dashboard duties | Information to provide to members |  |  |

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| **Preparation checklist** | **Relevant guidance** | **Your status comments** | **Complete** |
| **Ongoing actions** | | | |
| Stay up to date with developments to the regulations, Money and Pensions Service standards and relevant guidance | Stay in touch with developments |  |  |
| Check that your team and suppliers are on track to deliver | Overview – working with advisers and providers |  |  |
| Record key decisions and progress as per your existing governance processes | Ongoing connection and record-keeping requirements |  |  |
| Review and update your Data Protection Impact Assessment (DPIA) in line with your data improvement plan | Matching people with their pensions – preparing your data for matching |  |  |