Pension Dashboards
What can I do now?

The table below sets out what schemes and providers should be doing **now** to incorporate the requirements for Dashboards into their **wider data strategies** and thus start getting ready for compliance.

	Accessibility of all your pension records		
1	**Conduct** an organisation-wide exercise to ascertain if you have any non-digital records	1.1	Do you have records on spreadsheets, microfiche, or other non-digital storage?
		1.2	Consider all records you are responsible for
2	**Load** any non-digital records on to your main admin system so they are accessible digitally	2.1	Upload all records to your admin system
		2.2	Ensure all future records are always stored on your admin system
	Accuracy of all personal data items		
3	**Determine** (with your admin software team) which personal data items it will be most appropriate for you to match on	1.1	Can you reuse any existing processes for matching records you use?
		1.2	What standard matching approaches are used by your software supplier?
		1.3	Consider potential differences between different parts of your pensions business
4	**Consider** the processes you can adopt to assess and continually ensure your chosen personal data items are always accurate on every record you hold	4.1	Are you communicating with members soon when you could also check personal data?
		4.2	Could you use third party data sources to verify the personal data you hold?
5	**Plan** how you would like dashboard users to interact with you after you make a positive match against pensions you hold (so you return the right contact details)	5.1	Which communication channel(s) would you prefer to be contacted through?
		5.2	Be inclusive to support members' preferred channels
6	**Review** the Administrative (non-monetary) data requirements in the PDP standards guide to ensure you can return information for all the required data items	6.1	Contact PASA with any specific questions you have about the Administrative data items and we will include answers in subsequent iterations of this Guidance note
	Availability of accrued pension amounts		
7	**Ensure** an accurate accrued pension amount is available digitally on all your pension records (be it a DB income amount or a DC pot amount)	7.1	Do you hold the calculation date and payable date for all pension amounts?
		7.2	Will you calculate amounts on demand or use stored amounts, for example from the member's most recent benefit statement?
	Engagement with your administration and technology teams / suppliers		
8	**Begin** engagement with your suppliers	8.1	Talk to your pensions administrator and software / IT suppliers to understand their ideas & plans for connecting your systems to the pensions dashboards ecosystem