

PASA Data Matching Convention (DMC) Call to Action – December 2021

What to do now and links to help you

What do I need to do now?



Talk to your administrator/provider to understand and improve the accuracy of personal data on your scheme. Read the developing [PASA Data Guidance](#) for support with improving your data accuracy.



Talk to your administrator/provider about your digital data matching options. Read the full [PASA Data Matching Convention \(DMC\) Guidance](#) to understand how to approach this challenge and decide how dashboards matching should work for your scheme.

Look out for further Guidance on matching in 2022 and be well prepared by your staging date.

Why is this important?

1

Your members could be accessing dashboards within the next 24 months.

2

If you're responsible for a UK pension scheme, your deferred and active members will be able to log in to a dashboard and digitally request information about the pension they have with you.

3

To do this, you'll need to be able to receive a digital find request, use this information to look inside your records and see if you have a matching member record.

4

Once dashboards are launched, expected from 2023, there are likely to be many thousands of find requests every day, so you need to think about fully automating your matching process now.

Why do you need to worry about member matching?



Your administrator, software, or other provider will implement the technical process of matching, but you must decide how to match dashboard users to the pension records you hold.



Pension schemes have asked for industry-wide support on this topic, so PASA has published [Data Matching Convention \(DMC\) Guidance](#) to help you prepare.



Based on PASA's Guidance, many schemes will compare a dashboard user's Surname, Date of Birth (DOB), and National Insurance Number (NINO) against the records they hold. But this is risky if inaccurate.

You'll need to increase your scheme's focus on personal data accuracy

- **Data accuracy assessment:** Firstly, you need to investigate, assess, and understand the accuracy of the Surnames, DOBs and NINOs on all your deferred and active records.
- **Building on and exceeding your existing TPR Common data scores:** This investigation will require systematic checking of all the actual values (accuracy) held in these data elements.
- **Data accuracy improvement:** Your providers should then work with you to improve the accuracy of the values in these three personal data elements.

What are the risks?

- Whatever data elements you decide to digitally match on for dashboards, you must do so knowing how accurate they are in your records.
- If any data is incorrect, you risk returning data for the wrong person, or not finding a record when you should, negatively impact everyone.