Schemes and their administrators need to plan NOW to become Dashboards Connection Ready – here's 5 reasons why!

Connecting to dashboards is a legal obligation which trustees, scheme managers and providers need to meet by 31 October 2026. They'll be encouraged to adhere to the connection dates which will be set in guidance.

The industry has finite capacity of skilled resource to deliver dashboards, meaning not everyone can focus on the same work at the same time. As a result, missing a deadline on a key activity/decision could lead to you having to rejoin the queue at the end. Early consideration and action will reduce the risk of non-delivery and allow schemes to clearly demonstrate their commitment to dashboards connection which is **why it's so important to take action NOW!**

1

No schemes are 'dashboard ready'
This is a totally new requirement which needs significant preparation work and you don't know just how much work until you take a close look.
Action:
Consider the TPR Pensions Dashboards checklist

2

Early engagement with your administrator and suppliers is essential:
To schedule and resource all of the elements of this work.
Action:
Talk to your administrator and other suppliers about their plans for dashboards

3

There are a lot of detailed requirements to understand:
Schemes must have clearly assessed what connection to dashboards requires from them. This could include changes to data, calculations and communications as well as potentially new technology.
Action:
Review the requirements for any elements you haven't already considered in detail – starting with the PASA Pensions Dashboards Connection Ready Guidance

4

You need to understand your gaps as early as possible:
Based on where you stand against the dashboards' requirements in the key areas, you must identify the size of the task at hand before you can be sure of what's required next. This includes having data and technology ready for matching, and processes to calculate pension values.
Action:
Identify where what you do today doesn't meet the dashboards' requirements highlighted above

5

Agreeing prioritised delivery plans is essential:
Not all connection activity can or needs to be done now, but much of it can be. By prioritising action now effectively with your administrator, you can get ahead of the game and avoid the risks outlined above.
Action:
Develop a Pensions Dashboards Connection Plan to ensure all requirements will be met in the correct timescale

Taking these steps now is crucial to ensure you're not just connecting at the right time, but doing so successfully. The earlier you have the key pieces in place, the sooner you can test, iterate and improve your pensions dashboards solution and drive better outcomes for savers and schemes. Here are some of the key activities early movers will be able to the focus on to optimise results:

New technology and processes need testing

Whatever your solutions are, testing them ahead of connection dates is essential to prove they work and to understand them properly. This can only be achieved effectively if all elements of activity are in place for testing in advance of your ultimate connection date

Wider operational delivery models will need changing

To some extent informed by testing matching, pension values data and technology – these need to be at least understood before dashboards connection, and fully implemented by when dashboards are in live use and consumer testing begins

Savers will use dashboards!

Testing will demonstrate if they can find their pension and understand the information your scheme provides. If not, then time is required to put this right and avoid both a poor experience and unnecessary contact driving up costs/impacting other activity

Properly prepared for, dashboards can be a crucial development for savers in understanding their retirement provision, in turn demonstrating the enormous value of pensions. Don't take the risk their experience is a poor one and get connection ready now!