

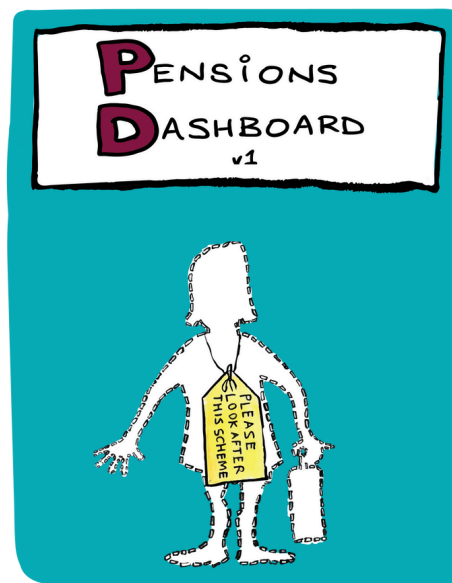
# Dashboards Working Group

---

SPRING 2024

UPDATE

---



PASA 

# Update

Following on from a busy 2023 and DWP's Guidance which [confirmed the staging dates for pensions dashboards' connection](#), as well as the publication of [PASA Guidance on Matching \(addendum\)](#), [Values](#) and [Connection Readiness](#) – we have a lot planned for 2024!

PASA is currently working on the following new Guidance and content, while keeping an eye on developments we may need to include as we progress through 2024.

## Additional Voluntary Contributions (AVCs)

The first phase of the Value Guidance published in June 2023 provided information on the different approaches to connecting AVCs to pensions dashboards, and the advantages and disadvantages of each approach. We're currently working on a toolkit to help administrators and support trustees and scheme managers in meeting their duties in relation to AVCs. The toolkit content will be issued on a phased basis. With the first phase planned for release during the second quarter of 2024

## Matching

The first test data connections will be made to the PDP Central Digital Architecture (CDA) from August 2024, and PDP will migrate to its long-term central identity service from Autumn 2024. We anticipate publishing further Guidance on matching against personal data attributes verified by the central identity service, as opposed to self-asserted data such as National Insurance Number and Previous Last Name

## Test Case Matrix

As dashboards will make information available to savers on a scale et exceeding anything undertaken previously in the industry, testing will be key to its success. PASA is working on a matrix of 'synthetic' test cases designed to help schemes understand the breadth of testing needed and plan their own testing. This is designed to support the saver experience through consistency of the information made available to dashboards. The matrix is planned for publishing towards the end of the second quarter of 2024. This work will also inform planning for live testing in 2025 through the PDP's User Testing and Planning Group (UTPG)

## Administration Readiness

While the need to be 'administration ready' might be some way off, administrators and providers are increasingly looking for guidance in this area. Our newest sub-group will be focused on helping schemes with activities such as query handling, internal and external management information and reporting, as well as impact on member communications

In addition, existing Guidance will be updated certain areas as further information is confirmed as aspects are clarified - for example, following publication of the final data standards. Wherever possible, we'll also continue to work closely with, and support, the work of the PDP and relevant regulatory bodies.

If there are any additional aspects of pensions dashboards where you think PASA could help, please do let us know.