

Appendix 1 – The Pension Regulator’s preparing to connect checklist: Progress of the Cambridgeshire Pension Fund

Preparation checklist	Relevant guidance	Your status comments
<b>Start now: general tasks</b>		
Establish pensions dashboards as a regular agenda item at board meetings.	Overview – your role and legal duties. #	Completed – Delivered as part of the Governance and Compliance Report at each meeting of the Committee and Board.
Discuss pensions dashboards with your administrator and other relevant parties (such as software provider, actuary, legal adviser, employer, additional voluntary contribution provider).	Overview – working with advisers and providers.	Underway – software provider – a dashboard readiness report has been received providing detail on the accuracy of the “find” and “value” data. Further discussions to be had on how data quality can be improved in these areas.  AVC Providers – Exploring whether the AVC providers will display this information separately.
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.	Pensions software tender is requiring supplier to perform ISP services for connection to the Dashboard ecosystem.
If required, appoint new suppliers or revise contracts for existing suppliers.	Connecting to pensions dashboards – choosing a digital interface.	Pensions software tender is incorporating Pension Dashboard requirements in compulsory elements of specification.
<b>Start now: data tasks</b>		
Understand what personal data you will receive from the digital architecture to help you match members to their pensions.	Matching people with their pensions.	A dashboard readiness report has been received providing detail on the accuracy of the “find” and “value” data. Further discussions to be had on how data quality can be improved in these areas.
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.	

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Where your member personal data needs improving, put plans in place to deliver the improvements.	Matching people with their pensions.	A dashboard readiness report has been received providing detail on the accuracy of the “find” and “value” data. Further discussions to be had on how data quality can be improved in these areas.
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.	
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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.	
<b>Ongoing actions</b>		
Stay up to date with developments to the regulations, Money and Pensions Service standards and our 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.	