

Appendix 2 – The Pension Regulator’s preparing to connect checklist: Progress of the Cambridgeshire Pension Fund

| Preparation checklist | Relevant guidance | Your status comments |
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| Start now: general tasks | | |
| 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. In Q1 2024/25 a data improvement plan will be produced to identify priorities and timescales, including results from the data matching reports if the procurement process is completed in time. 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. | Discussions underway with pensions administration software supplier to procure their ISP services and data matching reports. |
| If required, appoint new suppliers or revise contracts for existing suppliers. | Connecting to pensions dashboards – choosing a digital interface. | See above. |
| Start now: data tasks | | |
| 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. By Q1 2024/25 a data improvement plan will be produced to identify priorities and timescales, including results from the data matching reports if the procurement process is completed in time. |

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| Assess the quality and digital accessibility of personal data in your records. | Matching people with their pensions. | Pending procurement of data matching reports. |
| Consider which data items you will use to confirm matches are made or that there are possible matches. | Matching people with their pensions. | Following production of the data improvement plan in Q1 2024/25. |
| 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. During Q1 2024/25 a data improvement plan will be produced to identify priorities and timescales, including results from the data matching reports if the procurement process is completed in time. |
| Understand what data you will need to return to members and by when. | Information to provide to members. | We have started to review the data standards - View data Pensions Dashboards Programme . |
| 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. | We expect to use the most up to date data from the members Annual Benefit Statements. |
| 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. | We expect our data to be in line with the requirements of the dashboards. |
| Ongoing actions | | |
| Stay up to date with developments to the regulations, Money and Pensions Service standards and our guidance. | Stay in touch with developments. | |

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| 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. | |