

General tasks

Action	Relevant guidance	Your status comments	Complete
<p>Put in place effective oversight</p> <p>Establish pensions dashboards as a regular agenda item at your board meetings, record key decisions and stay up to date with developments in the regulations, Money and Pensions Service (MaPS) standards and relevant guidance.</p>	<p>Overview: your role and legal duties</p>		
<p>Check your connect by date</p> <p>Ensure you know your connect by date and when you need to complete different actions.</p>	<p>When your scheme needs to connect to pensions dashboards</p>		
<p>Decide how and when to connect</p> <p>Your decision should include whether you will build your own interface or use a third-party to connect - then you should agree when you will connect.</p>	<p>When your scheme needs to connect to pensions dashboards</p>		

General tasks

Action	Relevant guidance	Your status comments	Complete
<p>Prepare for your reporting and record-keeping requirements</p> <p>Make sure you understand what information you will need to report and what records you need to keep, and put in place the required processes.</p>	<p>Ongoing connection and record-keeping requirements</p>		
<p>Speak to your administrator and third-parties</p> <p>Agree a practical delivery plan with relevant parties e.g. software provider, actuary, legal adviser, employer, AVC provider - and ensure you receive regular updates on implementation.</p>	<p>Overview: your role and legal duties</p>		
<p>Appoint new suppliers or revise contracts</p> <p>Ensure you understand the service you are receiving and associated costs.</p>	<p>Overview: your role and legal duties</p>		

Matching data - used to match members to their pensions

Action	Relevant guidance	Your status comments	Complete
<p>Review data quality</p> <p>Assess the quality and digital accessibility of personal data in member records.</p>	<p>Matching people with their pensions</p>		
<p>Set your matching criteria</p> <p>Decide the data items you will use to confirm matches or possible matches.</p>	<p>Matching people with their pensions</p>		
<p>Prepare for possible matches</p> <p>Establish the process for how you will resolve possible matches when dashboard users contact you.</p>	<p>Matching people with their pensions</p>		

Matching data - used to match members to their pensions

Action	Relevant guidance	Your status comments	Complete
<p>Improve your data</p> <p>Where your member data needs improving, put plans in place to deliver.</p>	<p>Matching people with their pensions</p>		
<p>Produce or update your Data Protection Impact Assessment (DPIA)</p> <p>Matching, combining or comparing data from multiple sources requires a Data Protection Impact Assessment (DPIA). Review and update as necessary.</p>	<p>Matching people with their pensions</p>		

Value data - what you will return to members to show pension value

Action	Relevant guidance	Your status comments	Complete
<p>Understand the requirements</p> <p>You must know what value data you will need to return to members and by when.</p>	<p>Information to provide to members</p>		
<p>Review data quality</p> <p>Assess the quality and digital accessibility of the value data you will provide to your members.</p>	<p>Information to provide to members</p>		
<p>Improve your data</p> <p>Where value data needs improving or bringing up to date, put plans in place to deliver.</p>	<p>Information to provide to members</p>		

Please note:

If you have been using our original checklist – don't worry. The actions within the original checklist are still relevant. This new checklist is 1 of 2, where we have split pre and post connection actions for greater clarity, paired with some enhanced detail.