

GETTING READY FOR PENSIONS DASHBOARDS: A CHECKLIST FOR TRUSTEES

1

UNDERSTAND REQUIREMENTS AND TIMINGS

- + Understand your obligations to connect to the Pensions Dashboards and by what date.
- + The very last cut-off date is 31 October 2026.

2

DATA PREPARATION

- + Ensure your pension scheme data is accurate, complete, and formatted according to the Pensions Dashboards standards.
- + Check with your administrator to ensure this work is being progressed.

3

TECHNICAL INTEGRATION

- + Ensure your administrator has set up the necessary IT infrastructure to connect with the Pensions Dashboards ecosystem.
- + Confirm that your administrator's software systems can communicate securely and efficiently with the software used by Pensions Dashboards.

4

DATA PROTECTION

- + Verify compliance with data protection regulations, including updating your privacy notice, undertaking a data protection impact assessment (DPIA) and updating your data protection policy.

5

TESTING

- + Ensure your administrator conducts thorough testing of data transmission and system functionality.

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