Appendix A - Pension Regulator Dashboard Checklist

Preparation Area	Checklist Item	Relevant Guidance	Your Status Comments	Complete (Yes/No)
General Tasks	Establish pensions dashboards as a regular agenda item at board meetings	Overview – your role and legal duties	Dashboards are on LPB agenda	Yes
General Tasks	Check your 'connect by' date	When your scheme needs to connect with dashboards	Date confirmed as 31/10/2025	Yes
General Tasks	Discuss pensions dashboards with your administrator and other relevant parties	Overview – working with advisers and providers	CFRS attend "roundtable" presentations from LPPA, and Dashboard updates are provided in client reports	
General Tasks	Explore your route to connection	Connecting to pensions dashboards – choosing a digital interface	LPPA has chosen Civica as its preferred ISP.	Yes
General Tasks	Decide when to connect your scheme	When your scheme needs to connect with dashboards	31 October 2025 is the connection date for public service pension schemes	
General Tasks	If required, appoint new suppliers or revise contracts for existing suppliers	Connecting to pensions dashboards – choosing a digital interface	LPPA has chosen Civica as its preferred ISP.	Yes
Data Tasks to Match People	Understand what personal data you will receive from the digital architecture	Matching people with their pensions	Work undertaken with Civica as part of LPPA Pension Dashboard Project – data understood.	Yes
Data Tasks to Match People	Assess the quality and digital accessibility of personal data in your records	Matching people with their pensions	Work being undertaken within LPPAs data strategy project.	

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Preparation Area	Checklist Item	Relevant Guidance	Your Status Comments	Complete (Yes/No)
Data Tasks to Match People	Consider which data items you will use to confirm matches	Matching people with their pensions	Work undertaken with Civica as part of LPPA Pension Dashboard Project – data understood.	**Yes**
Data Tasks to Match People	Where your member personal data needs improving, put plans in place	Matching people with their pensions	Work being undertaken within LPPAs data strategy project.	
Data Tasks to Provide Information	Understand what data you will need to return to members and by when	Information to provide to members	Work undertaken with Civica as part of LPPA Pension Dashboard Project – data understood.	**Yes**
Data Tasks to Provide Information	Assess the quality and digital accessibility of the data that will be provided to your members	Information to provide to members	Work being undertaken within LPPAs data strategy project.	
Data Tasks to Provide Information	Consider how you will calculate the value data	Information to provide to members	Work undertaken with Civica as part of LPPA Pension Dashboard Project – data understood.	**Yes**
Data Tasks to Provide Information	Where value data is not in line with dashboard requirements, put plans in place	Information to provide to members	Work to be undertaken within LPPAs data strategy project.	
Ongoing Actions	Stay up to date with developments to the regulations, Money and Pensions Service standards and relevant guidance	Stay in touch with developments	LPPA is in regular contact with PDP, TPR and MaPS to stay up to date with developments.	
Ongoing Actions	Check that your team and suppliers are on track to deliver	Overview – working with advisers and providers	LPPA is in regular contact with Civica.	

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Ongoing Actions	Record key decisions and progress as per your existing governance processes	Ongoing connection and record-keeping requirements	LPPAs Project governance will ensure all key decisions are formally recorded.	
Ongoing Actions	Review and update your Data Protection Impact Assessment (DPIA)	Matching people with their pensions – preparing your data for matching	LPPAs DPO will maintain the DPIA.	