PDP webinar:

understanding the architecture and find and view data

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Pensions Dashboards Programme

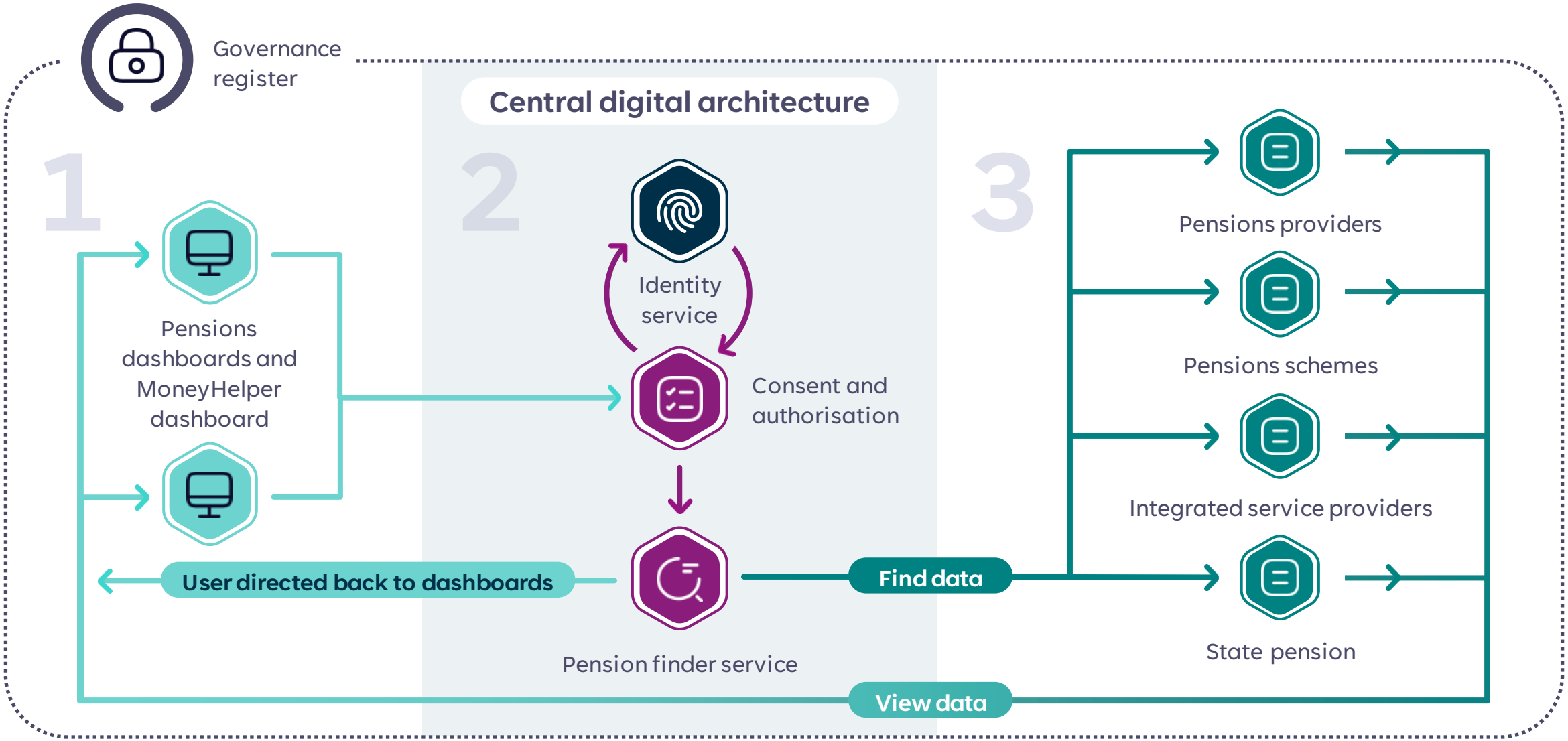
This session will be recorded.
Please put your questions in the chat bar.

December 2023

Agenda

1. Overview of the architecture
2. User journey
3. Components of the ecosystem
4. Governance register
5. What is find and view data?
6. Find data journey
7. View data journey
8. Data matching and preparing to connect
9. TPR guidance and checklist
10. Useful resources
11. Q&A
12. What's next?

Overview of the architecture



User journey

Dashboards (view)

- Dashboard provider landing page
- Create an account

Find

Safely finding and connecting individuals with their pensions by developing the central digital architecture

- Enter ‘find my pensions’ service
- Consent and authorisation service/ authorisation
- Identity service
- Add additional details to search
- Start search - Pension finder service

Dashboards (view)

- View pensions information

(Potential for third parties to build their own dashboards)

There are over 35,000 pension providers and schemes in the UK.

Components of the ecosystem

Pensions dashboards

Provides users with an accessible interface to view and manage their multiple pension funds and related information.

Consents and authorisation

Enables users to search, retrieve, and manage data on a dashboard, including self-asserted information entry and search initiation.

Identity service

The Identity service verifies users' identity and securely manages authentication credentials.

Pensions finder service

Orchestrates and distributes find requests across the pensions data provider endpoints (APIs).

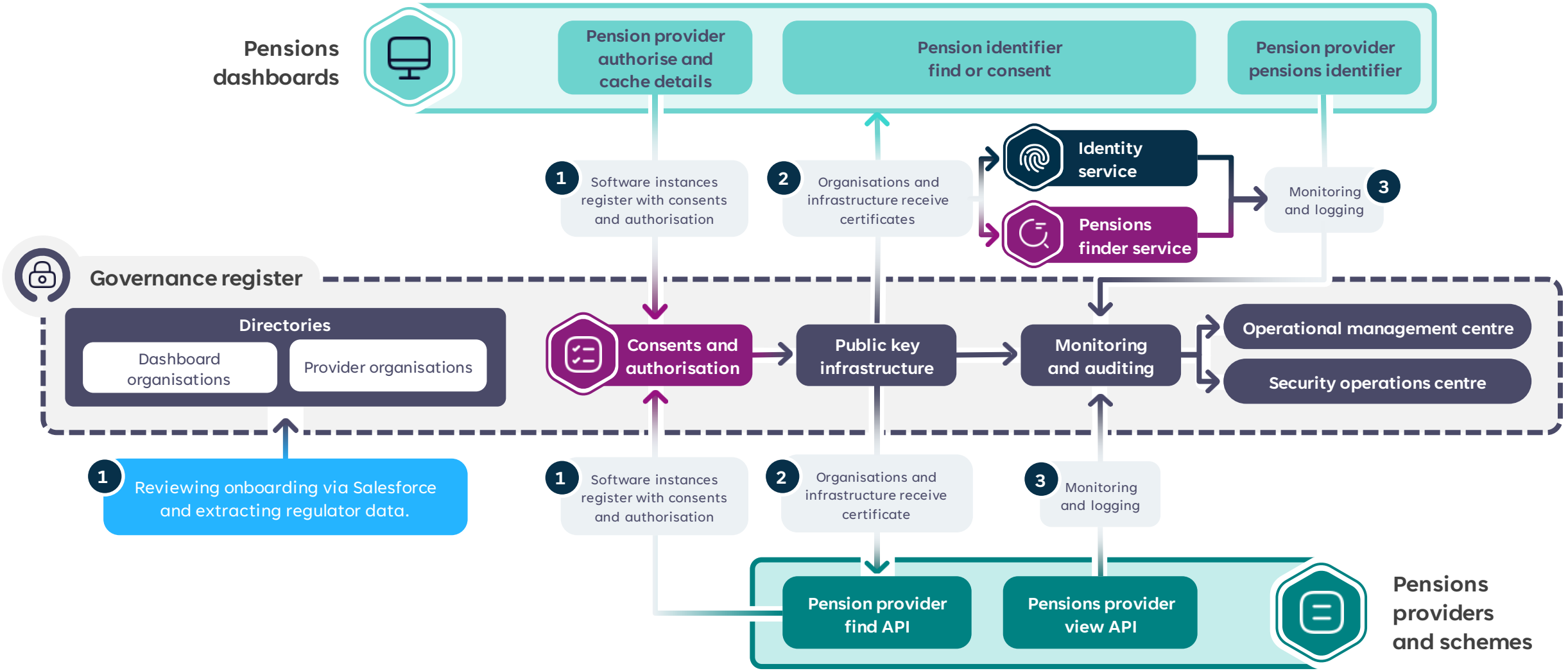
Pensions providers and schemes

Host Find and View API endpoints and internal pension finding/matching functionality and register found pensions with the CDA.

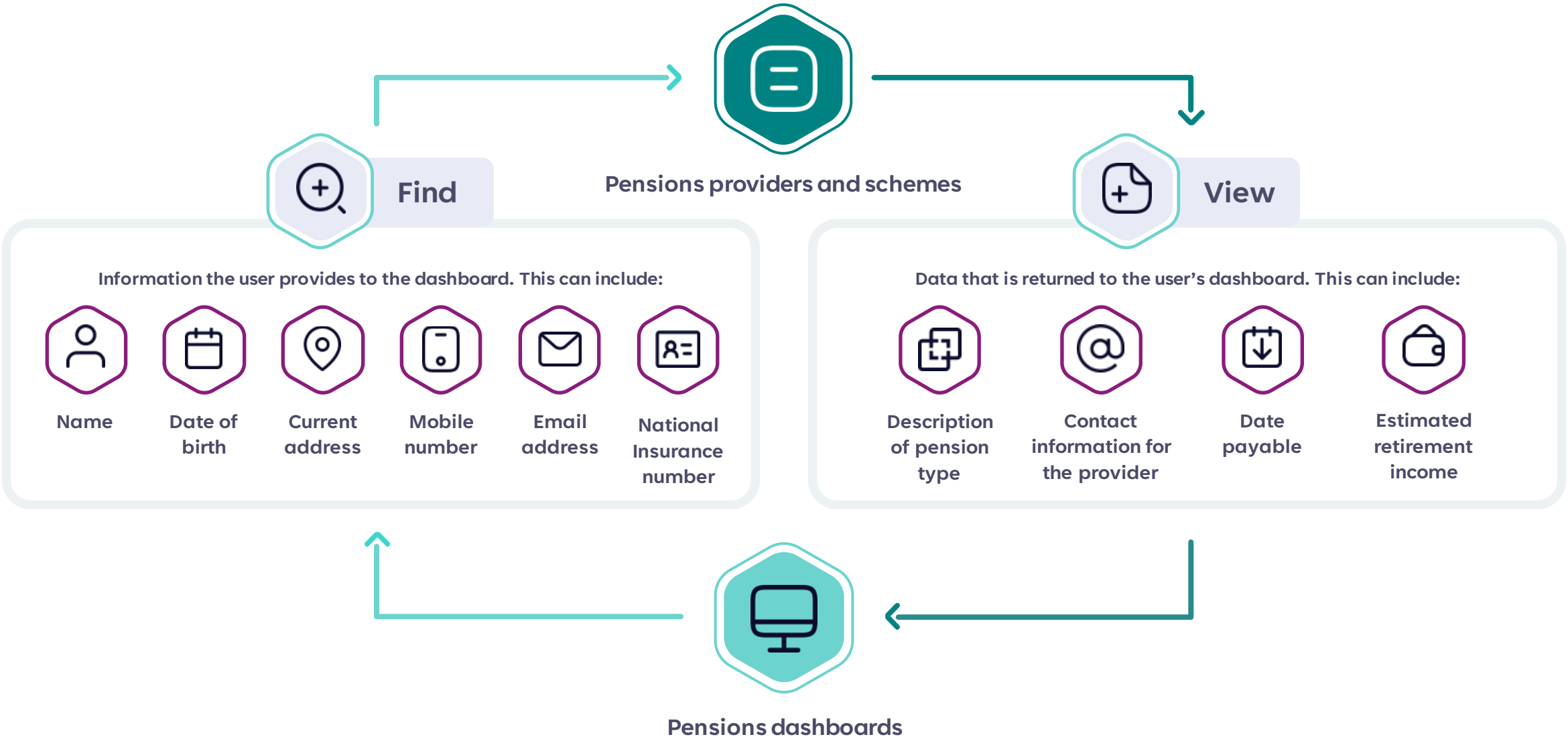
Governance register

Combining organisational processes and online IT components, it governs ecosystem participation and offers central reporting, technical monitoring, and related services.

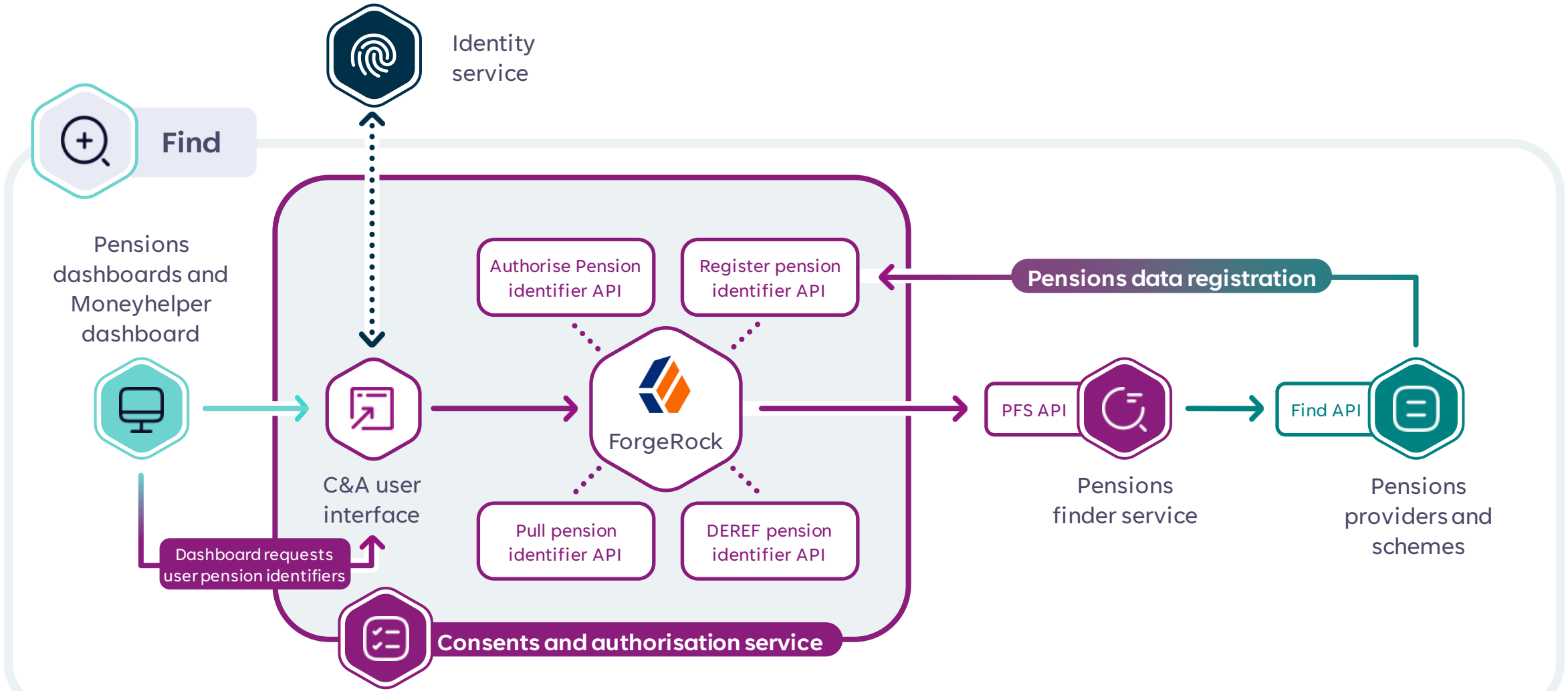
Governance register



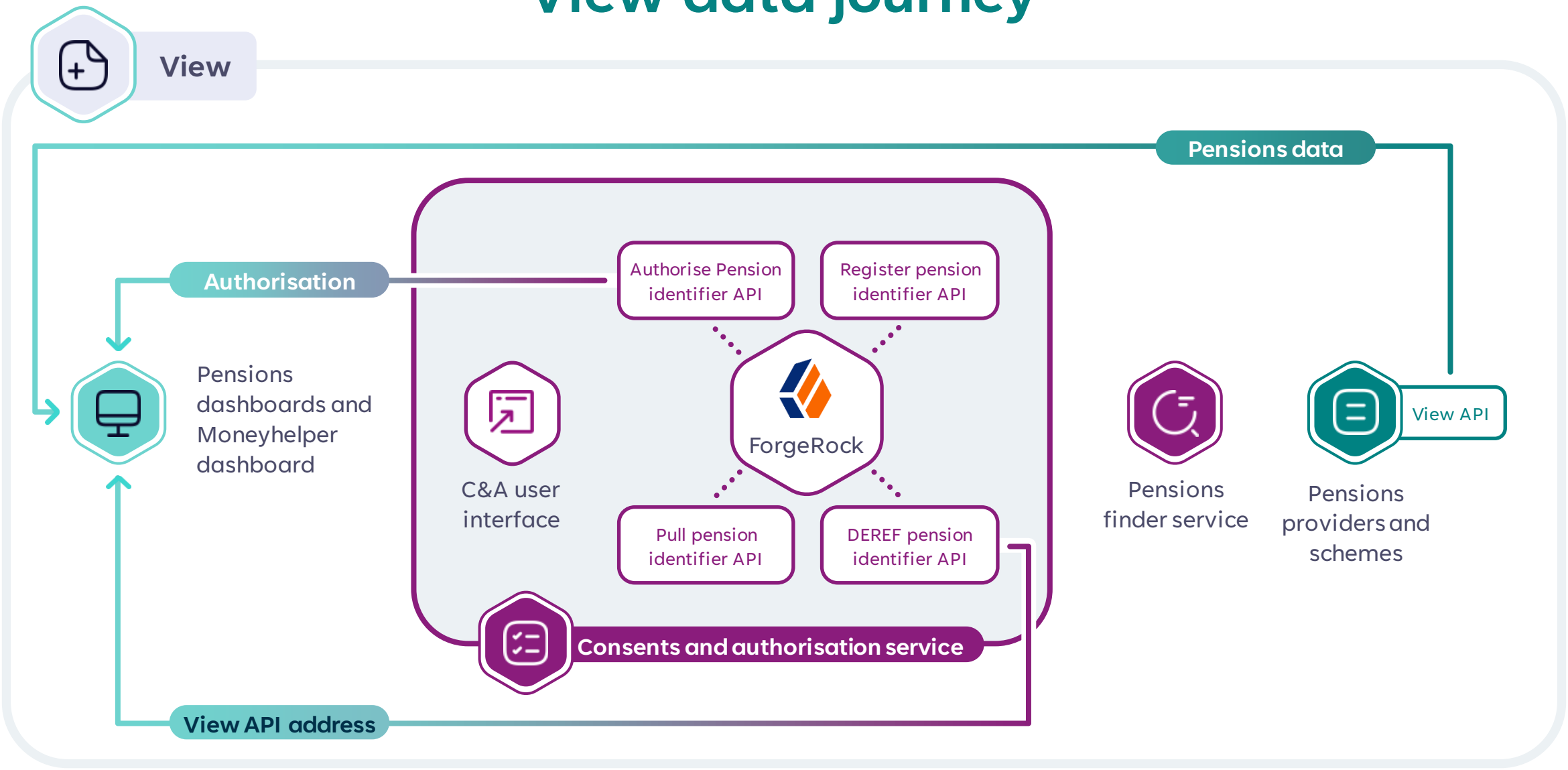
What is find and view data?



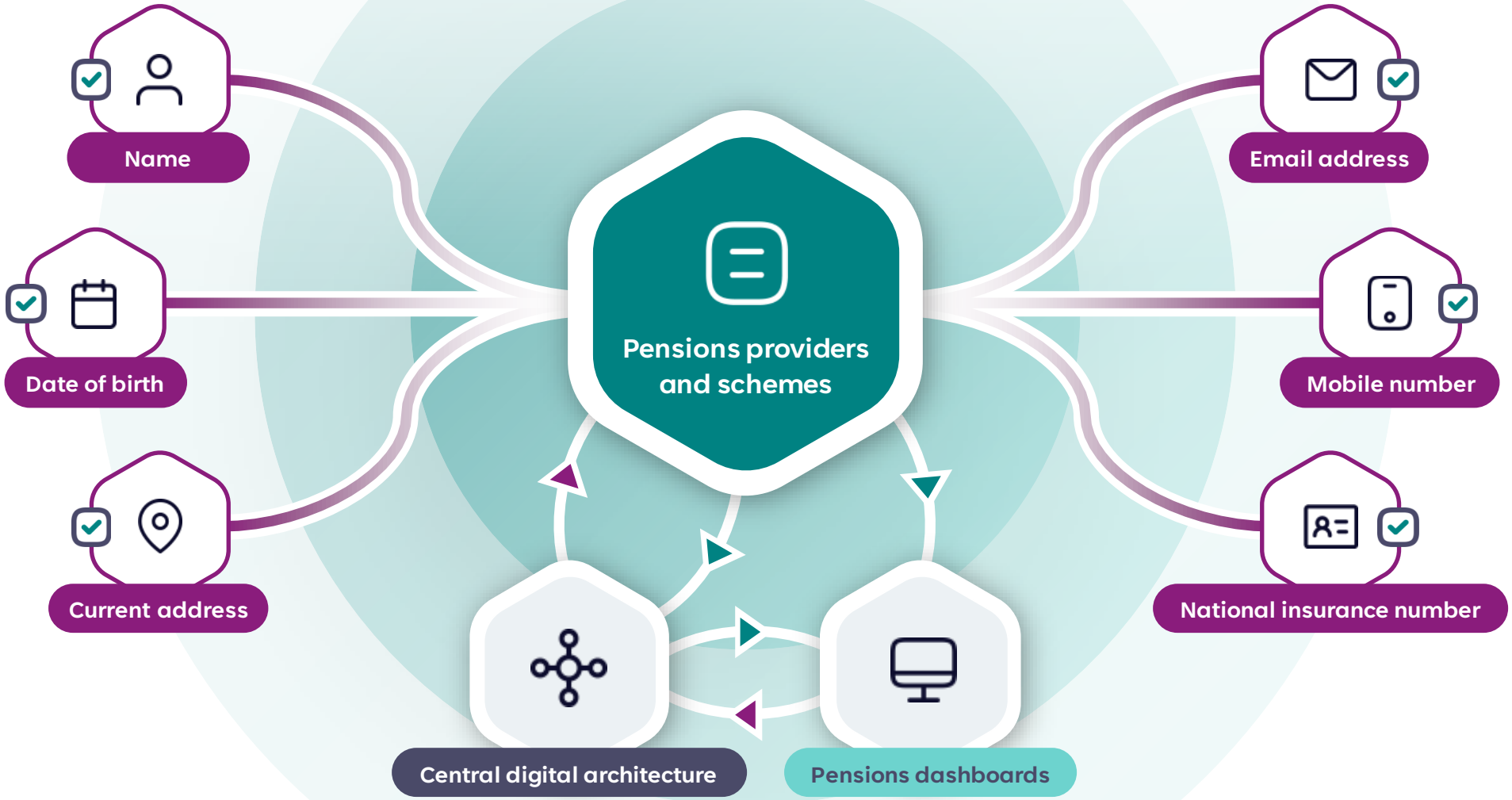
Find data journey



View data journey



Data matching and preparing to connect



Preparing to connect: checklist

- data preparation is crucial to ensuring that savers can find their pensions and receive accurate value information via dashboards
- TPR's **checklist** can be used to keep track of tasks, preparations, and see which actions schemes should already be taking
- trustees and administrators should work together and use the checklist
- **TPR's blog** explores the benefits of preparation for dashboards and how the checklist can help
- more information is available in **TPR guidance**
- **stay in touch** to make sure you receive updates from TPR about dashboards

Useful resources

PASA published an update to their guidance

For pension providers and schemes on the range of approaches to selecting matching criteria. This is the criteria when determining whether to match an individual from the data in the 'find requests' when compared against the member records they hold.

Chris Curry has interviewed Maurice Titley

Co-chair of PASA's Pensions Dashboards Working Group about industry preparing for dashboards.
This interview explores PASA's view on how data matching could be approached.

PASA data matching guidance newsletter

PASA's view on how data matching could be approached.

Possible data matching newsletter

Answering common questions on data matching.

Any questions?

Pensions Dashboards Programme

What's next?

PDP webinar:

connection guidance and understanding AVCs and value data

Date: Wednesday 17 January

Time: 3 - 4 pm

Register: pensionsdashboardsprogramme.org.uk/events

Stay in touch

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