

# Project Highlight Report

## Pensions Committee



|                      |                                                |                        |            |
|----------------------|------------------------------------------------|------------------------|------------|
| <b>Project Name:</b> | Pensions Dashboard                             | <b>Report Number:</b>  | 007        |
| <b>Period</b>        | April 2026 to July 2026                        | <b>Date Completed:</b> | 24/08/2026 |
| <b>Completed By:</b> | Jake Glover<br>Senior Pensions Project Officer |                        |            |

|                                       |              |
|---------------------------------------|--------------|
| <b>TREND SINCE LAST REPORT</b>        | <b>Green</b> |
| <b>CURRENT STATUS</b>                 | <b>Green</b> |
| <b>EXPECTED STATUS AT NEXT REVIEW</b> | <b>Green</b> |

| <b>Previous progress</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <b>Progress made this period</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Connection to dashboard established</li> <li>• Data successfully being sent to Dashboard</li> <li>• AVC single source data has been setup in TEST environment</li> <li>• Member testing has commenced</li> <li>• Team are testing reports functionality which produces information to be reported to MaPS</li> <li>• Data Quality work:</li> <li>• First mortality tracing completed.</li> <li>• Bank Account Verification is in Live</li> <li>• Address tracing completed – notification to go out to members.</li> </ul> | <ul style="list-style-type: none"> <li>• The new Communications and Governance Team Leader has started (august 2026) and will be working on the Dashboard policy. This is being worked on in conjunction with South Yorkshire Pension Fund.</li> <li>• Project plan has been reviewed and updated to include the TPR post-connection checklist.</li> <li>• Address tracing has been run and letters have been created for High and Medium matches. These will be sent out to members and this feeds into the overall Dashboard project to ensure data is accurate when Dashboards goes live during the next financial year.</li> </ul> |

### Slippage and Remedial Action

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- ~~Mortality screening delayed due to staff shortages at Heywood; this has delayed implementation of address tracing as we have now hit the valuation project which the team need to focus on.~~
- ~~After escalating this with CRM eventually went live 4 June 2025.~~
- ~~Implementing the Address Tracing module and the AVC interface have been delayed due to Heywood staffing pressures and not as a result of any delays/issues within the Fund.~~
- There is an issue with error messages coming from the dashboard from the AVC update. Heywood have now raised this as a problem.
- ~~Address tracing isn't live and working as there is an issue with the results and this is back with Heywood to resolve.~~

| Key Risks and Issues |                                                                                                                                                                              |          |               |
|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|---------------|
| R/I                  | Detail                                                                                                                                                                       | Rating   | Open / Closed |
| R                    | Suitable ISP is not obtained and so can not connect to dashboard                                                                                                             | Very Low | Closed        |
| R                    | Data quality is low, leading to poor matching criteria and members having to contact the fund to find their pension (rather than finding it directly through the dashboards) | Low      | Open          |
| R                    | Procurement of new tracing and mortality screening provider (gap in service as current provider current ends in September)                                                   | Very Low | Closed        |
| I                    | Decide on implementation dates                                                                                                                                               | N/A      | Closed        |
| I                    | How do we resource queries from Dashboard to reduce the team being overwhelmed and to meet required timescales                                                               | Medium   | Open          |
| I                    | What to use for Find Data and how AVC information will be accessed                                                                                                           | Medium   | Closed        |
| R                    | ISP connection deadline not met                                                                                                                                              | Low      | Closed        |
| R                    | Having adequate resource to deal with any additional work created                                                                                                            | Medium   | Open          |
| I                    | Delays with the AVC interface                                                                                                                                                | Medium   | Closed        |
| I                    | Delays with Address Tracing implementation (10/04/26 Reopened this issue as per point above)                                                                                 | Medium   | Closed        |
| I                    | Error messages being received from the Dashboard for AVC updates                                                                                                             | Medium   | Closed        |

## High Level Milestones

| Action                                        | Date Completed / Target Date | Status   | Comments                                                                                                                                                                                          |
|-----------------------------------------------|------------------------------|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Procure ISP                                   | August 2024                  | Complete | ISP procured and approved.                                                                                                                                                                        |
| Data Tools Procurement                        | February 2025                | Complete | Procurement complete and contract awarded                                                                                                                                                         |
| ISP UAT                                       | March 2025                   | Complete | UAT acceptance issued and signed off                                                                                                                                                              |
| Mortality Screening                           | June 2025                    | Complete | Module went live following a delay on the Heywood side                                                                                                                                            |
| Data Tools Implementation                     | April/May 2025               | Complete | Address Tracing to commence November – delayed due to staff pressures at Heywood working on the ISP                                                                                               |
| ISP Phase 2                                   | July/August 2025             | Complete |                                                                                                                                                                                                   |
| Single Source File connection with Prudential | September/October 2025       | Complete | Connection made to the Prudential SFTP and test file gained                                                                                                                                       |
| Single Source Solution Testing with Heywood   | September/October 2025       | Complete | Implementation dates slipped due to issues with the Heywood Altair interface. AVC solution now in place in Altair Test however, issues being investigated by Heywood so not yet deployed to Live. |
| Bank Account Verification                     | September 2025               | Complete |                                                                                                                                                                                                   |
| Address Tracing                               | October 2026                 | On Track | Letters now prepared to send to members that are High and Medium matches.                                                                                                                         |
| Dashboard Policy                              | December 2026                | On Track | This is progressing in conjunction with South Yorkshire Pension Fund.                                                                                                                             |