CIVICA
ideas into action

Pensions Dashboard Connectivity

Pensions information online, secure and all in one place.
Connecting 100 million pensions with citizens.

The Pensions Dashboard Programme enables citizens to view all their pension pots in one place. To make this work for our customers, we'll connect UPM to the dashboard in an easy and effective way. Our approach has a highly scalable design to support the 30 million citizens that will use the dashboard.

Our dashboard solution comprises two components, Civica ISP and UPM Connector. Working together they:

- Provide required data to citizens instantly and easily

- Reduce the load on UPM so you can maintain 24/7 access and service levels

- Maintain strict security with automatic governance reporting and monitoring.

Useful terms:

MaPS: Money and Pensions Service, the public sector body that's driving the implementation of the Pensions Dashboard Programme.

ISP: Integrated Service Provider, the provider (us) who integrates pension scheme providers and administrators to the dashboard ecosystem.

Data provider: A pension scheme, or integrated service provider, who provides data to the dashboard. This is where Civica and our customers fit in!

Digital architecture: Comprises the elements that make the dashboard work, such as the pension finder service, the identity service and governance register.

Dashboard ecosystem: The overarching system which includes the dashboard providers, data providers and digital architecture.

The Civica Solution

1 Low cost and minimal risk with easy integration to the dashboard ecosystem

2 Compliance, security and performance assured through an Azure cloud solution

3 Reduce maintenance through automatic initial and ongoing sync of data from UPM to the ISP (set and forget).

32k
pension schemes will be connected to the dashboard

Learn more:

civica.com/UPM

Contact email:

localgovernment@civica.co.uk

What does this mean for UPM?

Dashboard readiness, reporting and data rectification with Intellica

In addition to the Civica ISP, we've partnered with pensions data management provider, Intellica. It's Pensions Dashboard Readiness solution ensures you're prepared for the Pensions Dashboard Programme and provides a suite of checks specific to the Pensions Dashboard and UPM.

With powerful visualisation, the **Dashboard Readiness Solution** enables you to understand data quality including matching members, partial matches, data issues and ongoing data quality monitoring. This provides early and ongoing insight into the potential administration impact as you onboard to the Pensions Dashboard allowing you to correct data issues before they're highlighted by members.

Matching a citizen to their pension membership:

- Automatically matches a citizen who has logged into the dashboard to a membership within UPM

- Reliable and strong rules based on guidelines from PASA

- Accurate matching based on:
  - National Insurance number
  - Name
  - Date of birth.

- We produce data matches and partial matches (only NI number matches for example)
  - Redirection of partial matches to the scheme website, to allow members to correct their data
  - Accurate compliance measures are met through workflow actions for partial matches, to allow monitoring and reporting.

Presenting citizens with information on the dashboard:

Supporting members in understanding their total pension benefits and finding lost pensions, by providing information such as:

- Scheme benefits or AVCs due at retirement
- High level scheme data and documents .

Reporting and Management Information (MI):

We provide comprehensive MI and reporting in line with the PDP and the pensions regulator reporting standards, for example:

Find reporting:
- Number of find requests serviced

Match reporting:
- Number of full matches
- Number of partial matches (and whether converted to full)
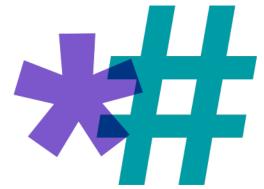- Time taken to correct partial matches

View reporting:
- Number of view requests serviced by dashboard provider

Query and complaint reporting.

Why choose Civica ISP?

- Makes reporting to the regulator on SLAs quicker and easier using UPM's workflow integration

- 24/7 availability and compliance with the PDP Code of Connection via robust and reliable Microsoft Azure hosting

- UPM Connector guarantees that our ISP works across all UPM versions now and in the future

- Ensures you won't be left behind – go-live from April 2023

- Delivers peace of mind that our relationship with the dashboard programme means we've an up to date understanding of the solution and industry drivers

- Avoids unnecessary costs and errors, as accurate data insight and validation from our partner, Intellica, ensures data is correct upfront

- Reduces cost and risk with a single solution, from one provider, for both technology and data.

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