Project Highlight Report
Pensions Committee

Shropshire County Pension Fund

Project Name:	Pensions Dashboard	**Report Number:**	008
Period	August 2026 to October 2026	**Date Completed:**	04/11/2026
Completed By:	Jake Glover Senior Pensions Project Officer		

TREND SINCE LAST REPORT	**Green**
CURRENT STATUS	**Green**
EXPECTED STATUS AT NEXT REVIEW	**Green**

Previous progress	Progress made this period
• Connection to dashboard established • Data successfully being sent to Dashboard • AVC single source data has been setup in TEST environment • Member testing has commenced • Team are testing reports functionality which produces information to be reported to MaPS • First mortality tracing completed. • Bank Account Verification is in Live • 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. • Project plan has been reviewed and updated to include the TPR post-connection checklist.	• 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. • Address tracing project is standalone but does feed into the data accuracy for Dashboards. High matches have been contacted via email and letter. A plan will be put in place for Medium matches with regards timescales. • The Dashboard policy work is currently on hold as other policies have taken priority. The Dashboard policy will be completed early 2027.

Slippage and Remedial Action
• There is an issue with error messages coming from the dashboard from the AVC update. Heywood have now raised this as a problem.

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Key Risks and Issues			
R/I	**Detail**	**Rating**	**Open / Closed**
R	Data quality is low, leading to poor matching criteria and members having to contact the fund to find their pension	Low	Open
R	Having adequate resource to deal with any additional work created	Medium	Open
I	How do we resource queries from Dashboard to reduce the team being overwhelmed and to meet required timescales	Medium	Open
R	Suitable ISP is not obtained and so can not connect to dashboard	Very Low	Closed
R	Procurement of new tracing and mortality screening provider (gap in service as current provider current ends in September)	Very Low	Closed
R	ISP connection deadline not met	Low	Closed
I	Decide on implementation dates	N/A	Closed
I	What to use for Find Data and how AVC information will be accessed	Medium	Closed
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

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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	High match members have been contacted via email and letter. Plan to be put in place for Medium matches.
Dashboard Policy	December 2026	On Track	This is progressing in conjunction with South Yorkshire Pension Fund and will be expected to be finalised early 2027.