Getting ready for Dashboards

Mantle is a Pensions Dashboards ready solution. It can serve all the necessary data to the Dashboards Infrastructure via Equisoft, our ISP. There are however a number of things a Scheme needs to do to ensure readiness and minimise inbound call traffic.

Item	What needs to be done
Agree find data at-tributes	Trustees need to agree on the attributes, postcode, NINO etc that will be used to de-termine a match from a find request. Recommendation is of a small set with the highest probability of a clear match, or no match.
Registration code	The trustees will receive a code that needs to be passed to Mantle to enable the scheme to be registered on the Dashboards infrastructure.
Find data quality	Ensure that member postcodes are up to date. This will minimise the risk of partial matches, which will incur an administration overhead.
Value data quality	To enable an estimated retirement income to be automatically generated, all data items need to be complete on the member record.
Manual ERI worka-round	If Mantle can't generate an ERI due to a data issue a workflow task is created with the appropriate SLA. 3 days for DC & 13 for DB. Sufficient administration resource needs to be available to meet the demand.
DB ERI calculation basis	As far as possible there needs to be consistency in the way benefits are calculated by Mantle for the Dashboards, benefit statements and member self serve. Failure to do this could create confusion and generate a volume of inbound calls.
Consider member communication	There may be value in warming up members to the availability of PDP and explain-ing any potential disparity in values they have seen already and what will be pre-sented on a Dashboard. It's also an opportunity to signpost the member phone and web app as a way of accessing benefits.