
STATUTORY INSTRUMENTS

2022 No. 1220

The Pensions Dashboards Regulations 2022

PART 3

**Requirements relating to trustees or managers
of relevant occupational pension schemes**

CHAPTER 1

Requirements relating to cooperation and connection

Connection affected by an assessment period

20.—(1) If an assessment period in relation to a pension scheme begins before the scheme has connected to the Money and Pensions Service—

- (a) trustees or managers are not required to connect the scheme to the Money and Pensions Service before the assessment period ends, and
 - (b) if, when the assessment period ends, the scheme continues to function as a pension scheme, the deadline for connecting to the Money and Pensions Service is whichever is the later of the following—
 - (i) 6 months beginning with the day after the date on which the assessment period ends, or
 - (ii) the deadline for connecting to the Money and Pensions Service that applied previously, under whichever of regulations 15 to 19 is relevant in the circumstances.
- (2) Once a deadline applies pursuant to paragraph (1)(b)—
- (a) the deadline remains fixed, even if there is a change in the classification of the scheme type or in its size, unless—
 - (i) permission to connect early or to defer connection is given under regulation 16 or 17 respectively, or
 - (ii) all the members of the scheme become pensioner members;
 - (b) the connection window for the scheme is the period of one month leading up to and including the deadline.
- (3) Trustees or managers must—
- (a) register the scheme with the Money and Pensions Service, having regard to the guidance referred to in regulation 15(2)(d);
 - (b) connect the pension scheme to the Money and Pensions Service within the connection window referred to in paragraph (2)(b), in compliance with the standards referred to in regulation 15(2)(c) and having regard to the guidance referred to in regulation 15(2)(d);
 - (c) meet the requirements in regulation 15(4) and (5).

(4) If an assessment period in relation to a section of a scheme or a segregated part of a scheme begins before the scheme has connected to the Money and Pensions Service, this does not affect the

requirement for the scheme to connect to the Money and Pensions Service unless all the sections or segregated parts of the scheme are subject to the assessment period.