STATUTORY INSTRUMENTS

2022 No. 1220

The Pensions Dashboards Regulations 2022

PART 3

Requirements relating to trustees or managers
of relevant occupational pension schemes

CHAPTER 2

Requirements following connection of a pension scheme

Administrative data

24.—(1) Administrative data is comprised of the following—

(a) information about the pension scheme, including—

(i) the name of the pension scheme;

(ii) a description of the types of benefits provided under the scheme to the individual;

(iii) whether the individual is an active member, a deferred member or a pension credit member;

(iv) the date when the individual became a member of the scheme;

(b) information about the scheme's administrator, including—

(i) the name of the administrator, having regard to guidance on data issued from time to time by the Money and Pensions Service;

(ii) information to enable the individual to get in touch with the administrator, which accords with data standards published from time to time by the Money and Pensions Service, and which includes at least one of the following—

(aa) the administrator's website address;

(bb) the administrator's email address;

(cc) the administrator's telephone number and telephone number type, including whether the number is the primary telephone number, is appropriate for Welsh language speakers, or is for text message service only;

(dd) the name and full postal address of the administrator;

(c) information about the employment to which the pension relates, including (if available)—

(i) the start date of the earliest pensionable service and, in the case of a deferred member, the end date of the latest pensionable service, and

(ii) whichever of the following is appropriate—

(aa) in a case where the pensionable service relates to a single employer, the name of the employer;

(bb) in a case where the pensionable service relates to more than one employer, either the name of the most recent employer or confirmation that there have been multiple employers.

(2) Subject to paragraph (3), trustees or managers must provide administrative data immediately after a view request is received.

(3) In the case of a member who seeks view data within 3 months of joining the scheme (resulting in a view request being issued by a pensions dashboard service), trustees or managers must provide the administrative data referred to in paragraph (1) as soon as practicable, and no later than 3 months after the member's joining date.

(4) When providing administrative data under this regulation, trustees or manager must also provide the date of birth of the individual concerned.