

## Examination Guidance for Employers / Centres

<p>Examinations are marked against the <b>performance criteria</b> set out for each unit in the qualification. Learners generally fail because they do not apply the <b>performance criteria</b> correctly or because do not fully understand the rules of the schemes on which they are being tested in the examinations.</p>	
<p><b>Procedural Failure</b></p>	<ul style="list-style-type: none"> <li>➤ Where a learner has not been entered for an examination by the entry closing date</li> <li>➤ Where a learner attempts an examination for which they have not been entered</li> <li>➤ Where a learner's personal 'learner number' is missing or incorrect on the answer script</li> <li>➤ Where a learner's name appears anywhere on the answer script (e.g. where a letter is signed with a name other than 'AN Other')</li> <li>➤ Where a learner attaches calculation templates or letter templates to an answer script</li> <li>➤ Where a centre has been proven to have followed incorrect formal procedures relating to the examination</li> </ul>
<p><b>Examination Failure</b></p>	<ul style="list-style-type: none"> <li>➤ Any of the case studies have not been attempted (<b>Section A</b>)</li> <li>➤ Any of the requested letters have not been attempted (<b>Section B</b>)</li> <li>➤ There are <u>more than</u> <b>three</b> errors against a specific performance category across all of the case studies (<b>Section A</b>)</li> <li>➤ There are <u>more than</u> <b>three</b> errors against a specific performance category across all of the requested letters (<b>Section B</b>)</li> <li>➤ There are <u>more than</u> <b>three</b> errors (regardless of performance category) for any of the individual case studies (<b>Section A</b>)</li> <li>➤ There are <u>more than</u> <b>three</b> errors (regardless of performance category) for any of the individual requested letters (<b>Section B</b>)</li> <li>➤ There are <u>more than</u> <b>six</b> errors (regardless of performance category) across all of the case studies and all of the requested letters (<b>Section A</b> and <b>Section B</b> combined)</li> </ul>

To avoid making errors in Case Studies (**Section A – Calculations**) learners must:

- Use correct personal details from the members' records
- Show the full range of benefit options with regard to the scheme rules
- Apply scheme definitions accurately to calculate benefits
- Understand the statutory requirements for contracting out and know how to apply tax to short service benefits
- Set out calculations and determine factors according to accepted procedures
- Carry out calculations without any arithmetical errors
- Check and recalculate benefits where necessary to meet GMP statutory requirements
- Calculate benefits that impact a member's Lump Sum Allowance (LSA) or Lump Sum & Death Benefit Allowance (LS&DBA) and recognise when the available limits have been exceeded
- Incorporate special circumstances accurately into calculations (e.g. part-time service, enhanced accrual rates, transferred-in benefits, AVCs and augmentations)
- Recognise where lump sum death benefits are payable to legal personal representatives or where the Trustees must use their discretion in determining the recipient(s)

<p>To avoid making <u>errors</u> in Letters associated with Case Studies (<b>Section B – Letters</b>) learners must:</p>	<ul style="list-style-type: none"> <li>➤ Quote dates used and benefits calculated which match the values from the case studies</li> <li>➤ Quote benefits which can be paid</li> <li>➤ Quote benefit options and values in accordance with accepted procedures</li> <li>➤ Quote complete and accurate information relating to the benefits in accordance with accepted procedures</li> <li>➤ Provide information only which they are authorised to give and provide information that they are obliged to give</li> <li>➤ Provide clear instructions to the addressee with regard to the response required</li> </ul>
<p>How can learners help themselves?</p>	<ul style="list-style-type: none"> <li>➤ Fully understand the three schemes being tested in the examinations</li> <li>➤ Access previous papers (and answers) via the PMI website</li> <li>➤ Practise answering previous papers under exam conditions</li> <li>➤ Read previous 'Examiners Reports' and their associated appendices which explain why learners sometimes fail to meet the required standards</li> <li>➤ Read the 'Advice to Learners' documentation sent prior to the examinations</li> <li>➤ Consider using the on-line learning (<i>including Case Studies</i>) available from the PMI</li> </ul>