



VQ REGISTRATIONS

A complete guide to navigating the PMI website and your online portal

PMI Qualifications Team

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VQ Registrations: The essentials

In order to sit any of our VQ registrations, learners must first be registered for the qualification in question by paying a registration fee of **£80**.

As we have moved away from application forms and registration is now completed online, the following steps will need to be followed before submitting learners for registration:

1. Ensure that they have an existing PMI account. If they do not or are completely new to the PMI, an account will need to be created first. ([please click here for instructions](#)).
2. Please contact the PMI qualifications team on pmiqualifications@pensions-pmi.org.uk and provide the following details so that we can register the learners:

Title of Qualification(s):

Name of Registrant:

PMI number (if known):

Name of Booker (if booking on behalf of learner):

Total cost:

PO Number (if required):

Please note, if you wish the invoice to show the company's details, you will need to appoint a contact that can be used to register on behalf of candidates. They will also need to have a PMI account if they don't already have so.

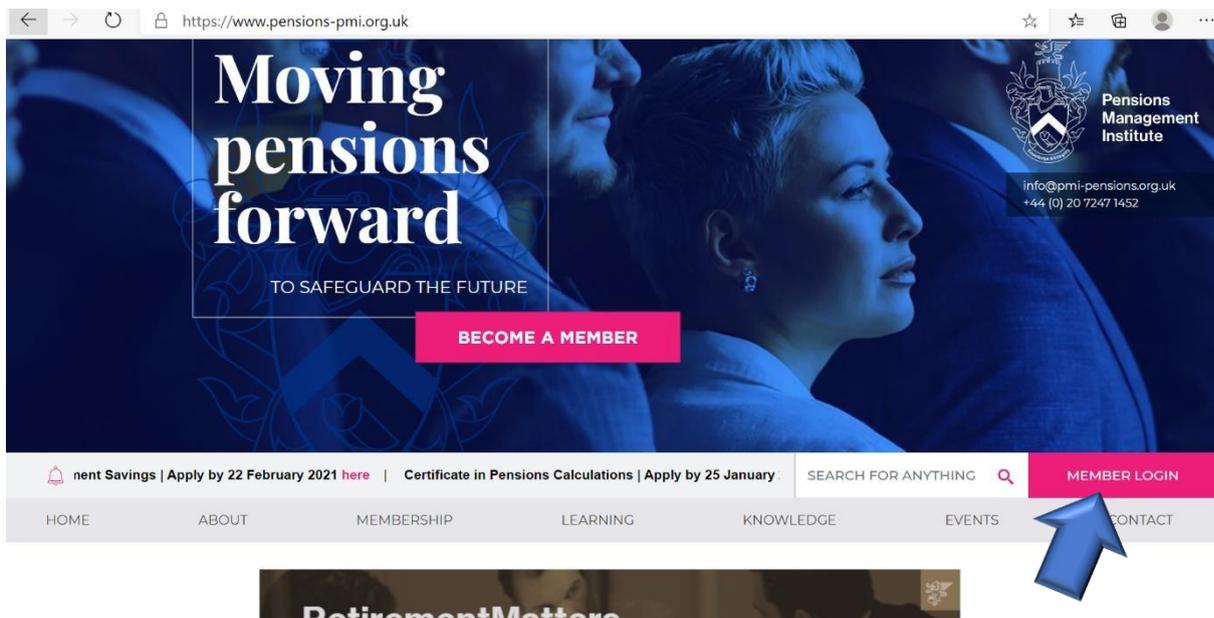
Once the steps above have been followed, we will register your learner(s) and an email containing the order confirmation will be sent.

1. Your PMI Account

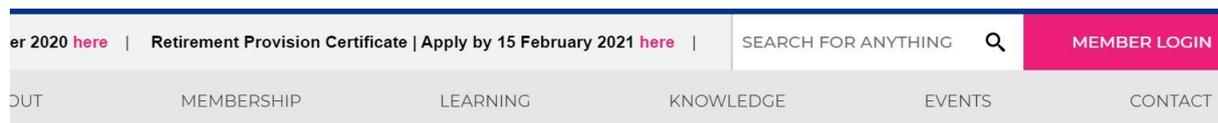
1.1 New members

If you are **new** to the PMI and have **never** registered any details with us prior, please follow these steps:

1. Go to the PMI website and click on the “Member login tab” or follow this [link](#)



2. Click on “create a new account”



Sign In

Username

Password

Keep me signed in

SIGN IN

[Forgot username?](#) | [Forgot password?](#)
[Create a new account](#)

3. Fill in your details, making sure to not leave any of the asterisked fields empty.

HOME

ABOUT

MEMBERSHIP

Create an Account

Prefix

* First name

Middle name

* Last name

Suffix

Organization 

* Email

Phone

Mobile phone

* Country

If your organisation doesn't appear on the drop down menu as you type, please contact us as we will have to add your organisation to the portal.

N.B – you can still register prior to us doing this step as we will link your account to your organisation once set up.

Alternatively, you can link your organisation by logging back into your account once set up.

Postal code lookup

* Address

* City

* County / region

* Postal code

Username 

* Password

* Confirm password

If you create a username, this is what you will use to login to your portal. If you leave it blank, then you'll use your email address to login instead.

The password must be at least 7 characters long and contain both letters and numbers.

Save

Cancel

- Once all fields are completed, click save. You have now successfully created your account and can now login to your MY PMI portal.

On Behalf Of (select)
Kumba Bokoka
The Pensions Management Institute
Preferred Billing
International Financial Centre
25 Old Broad Street
LONDON
EC2N 1HQ
UNITED KINGDOM
kbokoka@pensions-pmi.org.uk

Navigation: HOME, ABOUT, MEMBERSHIP, LEARNING, KNOWLEDGE, EVENTS, CONTACT, MY PMI

Search: SEARCH FOR ANYTHING...

MEMBERS LOGOUT

Profile Tabs: About, Participation, History, APTitude, CPD, Direct Debit, Directory Profile, Documents, Historical Transactions, PMI Information, PMI Membership, Qualifications (Not current), Preferences, Regional Groups, WPA, Historical Activities

Membership, Addresses, Contact Tags, Social profiles, Relationships

1.2 Existing members

If you have **previously** completed an exam, qualification or attended an event with the PMI, it is likely that you already have an account. **PLEASE** follow the following steps as attempting to create a new account will result in a duplicate account being created which is not ideal and could interfere with future event/ exam registrations.

- Go to the PMI website and click on the “Member login tab” or follow this [link](#)

https://www.pensions-pmi.org.uk

Moving pensions forward
TO SAFEGUARD THE FUTURE
BECOME A MEMBER

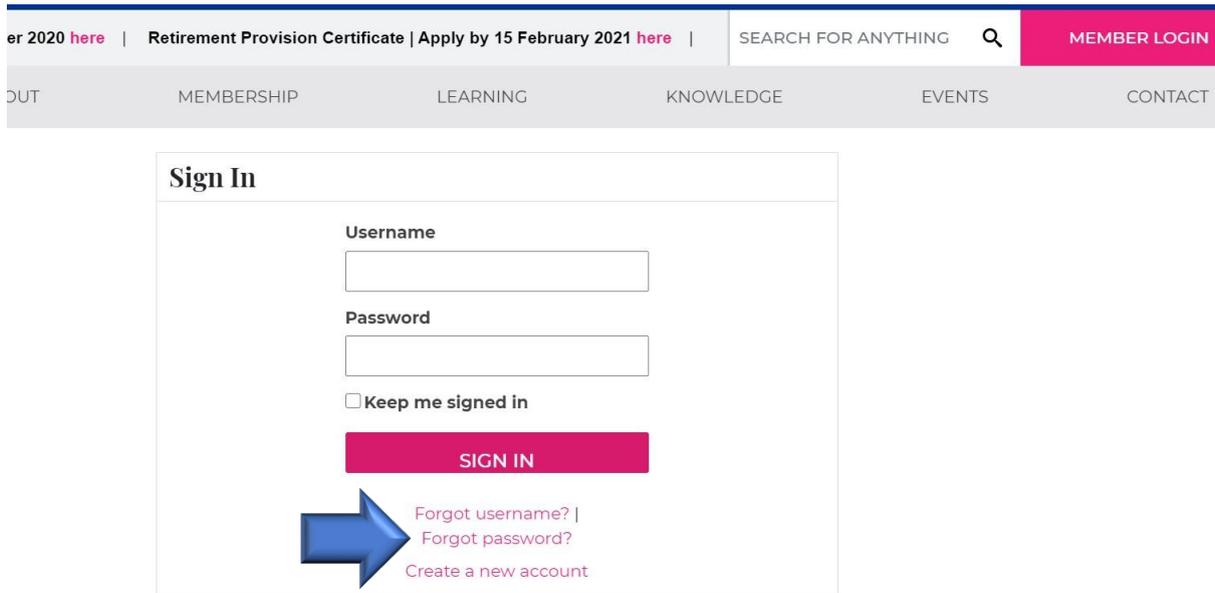
Pensions Management Institute
info@pmi-pensions.org.uk
+44 (0) 20 7247 1452

Navigation: HOME, ABOUT, MEMBERSHIP, LEARNING, KNOWLEDGE, EVENTS, CONTACT

Search: SEARCH FOR ANYTHING...

MEMBER LOGIN

2. If you know the username (email address) the PMI holds for you, select “Forgot password”



The screenshot shows the top navigation bar with links for 'er 2020 here', 'Retirement Provision Certificate | Apply by 15 February 2021 here', 'SEARCH FOR ANYTHING', and 'MEMBER LOGIN'. Below the navigation bar is a menu with 'HOME', 'MEMBERSHIP', 'LEARNING', 'KNOWLEDGE', 'EVENTS', and 'CONTACT'. The main content area is titled 'Sign In' and contains a form with the following elements:

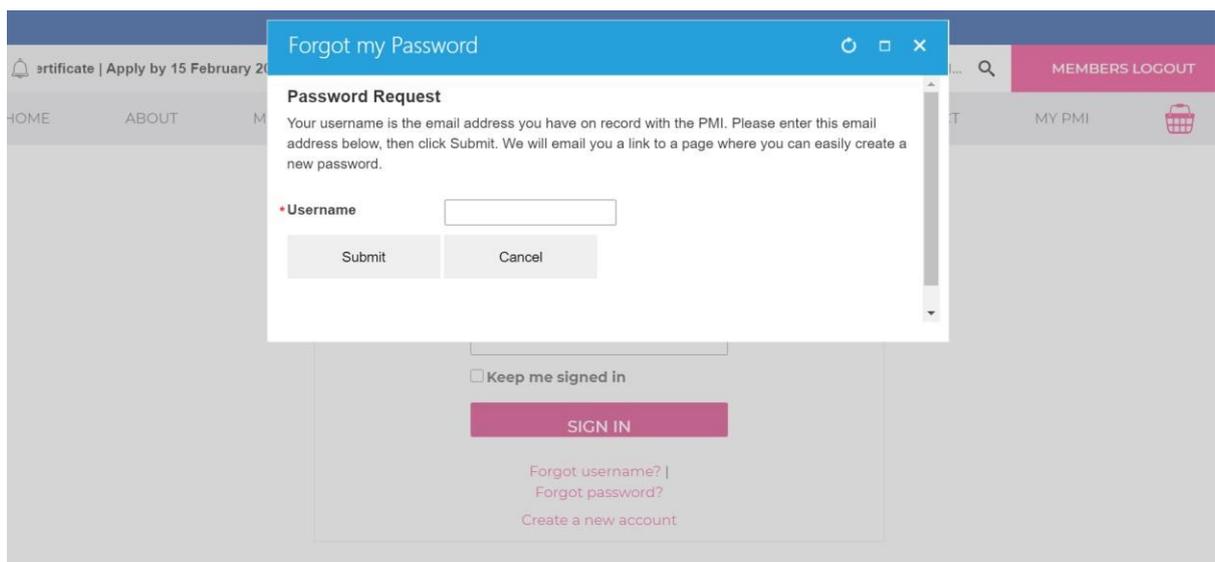
- Username** input field
- Password** input field
- Keep me signed in**
- SIGN IN** button
- Links: [Forgot username? |](#), [Forgot password?](#), and [Create a new account](#)

A blue arrow points to the 'Forgot password?' link.

3. Enter your email address and click “submit.” A password reset link will be emailed to your email address. **PLEASE** be sure to check your junk/ spam folders too as sometimes the link can be sent there.

Please follow the instructions detailed in the email received.

If you do not receive a reset password link after 24 hours, please contact us.

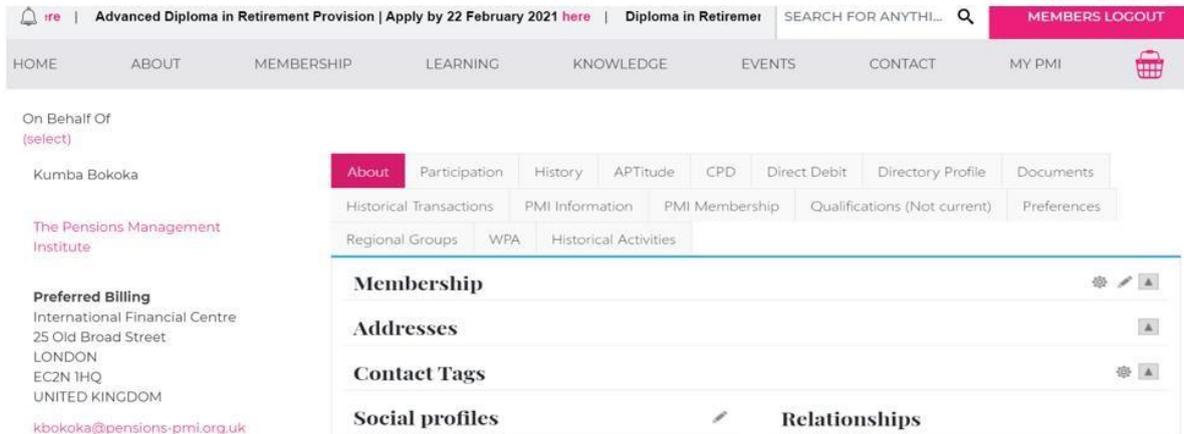


The screenshot shows the 'Forgot my Password' dialog box overlaid on the 'Sign In' page. The dialog box has a blue header and contains the following text and elements:

- Forgot my Password** (header)
- Password Request** (title)
- Your username is the email address you have on record with the PMI. Please enter this email address below, then click Submit. We will email you a link to a page where you can easily create a new password.
- Username** input field
- Submit** and **Cancel** buttons

The background shows the 'Sign In' page with the 'SIGN IN' button and the 'Forgot password?' link highlighted.

- Once you have successfully reset your password and logged into your account, you should be able to see your personal profile page:

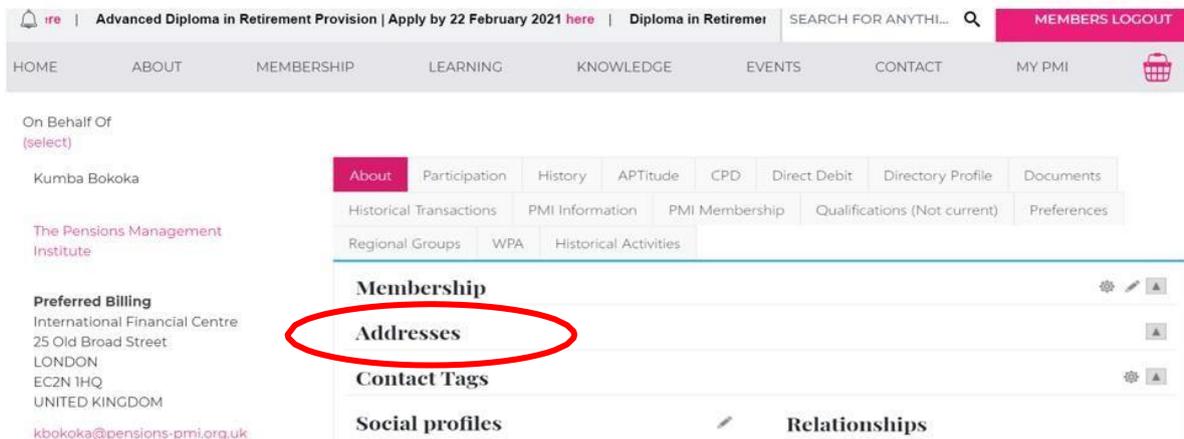


1.3 Viewing/ Editing your details

You can edit the information on your profile as often as required. You are able to store multiple addresses on the system and select a preferred address/ email you would like the PMI to use to contact you. You are also able to change your name, add your date of birth as well update your current employer.

1.3.1 Updating/ Adding Addresses

- To add additional addresses, expand the Addresses tab and click on the “+”



2. You will then be prompted to add your new address by either entering the postcode to search for it or entering it manually in the section below. In the field marked 'Purpose' you have the option to select whether it is a business, personal, home address etc.

Once all details have been entered, click 'Save & Close.' The new address should show, if it does not, you may need to refresh your browser.

The image shows a 'New Address' form with a blue header bar. The form contains several fields and buttons. A red circle highlights the 'Purpose' dropdown menu, which is currently set to 'Address'. A blue arrow points to the 'Postal code lookup' section, which includes a text input field and a 'Search' button. Another blue arrow points to the 'Save & Close' button at the bottom right of the form. The form also includes a 'Notes' text area, a 'Country' dropdown menu set to 'United Kingdom', and several empty text input fields for 'Address', 'City', 'County / region', and 'Postal code'.

New Address

Address

Purpose Address

Country United Kingdom

Postal code lookup Search

Notes

Address

City

County / region

Postal code

Save & Close Cancel

1.3.2 Name and Employer Changes

1.3.2.1 To update your name or organisation you need to select the pencil icon located to the top left-hand side of the screen.



1.3.2.2 You will then be able to update the necessary information and then click 'Save & Close' to register your changes.

Edit ↻ □ ×

Prefix	First name	Middle	Last name	Suffix
<input type="text"/>	<input type="text" value="Kumba"/>	<input type="text"/>	<input type="text" value="Bokoka"/>	<input type="text"/>

Designation	Title
<input type="text"/>	<input type="text"/>

Informal name	Full name
<input type="text"/>	<input type="text" value="Kumba Bokoka"/>

Primary organization

Mobile phone

Status

Erase this contact
Use this button if this contact has requested that they be erased from the database. Depending on your data retention policy, it may not be possible to undo this action.

Save & Close Save Cancel

PLEASE DO NOT ERASE A CONTACT. If you no longer require an account or feel that you may possibly hold a duplicate account, **please contact us**, and we will rectify this for you. Once erased, it may not be possible to recover an account and all history associated with said account could potentially be lost.

1.4 Finding Invoices/ Transactions

To view invoices, click on the 'Participation' tab and scroll down to the section that says 'Open Invoices.' This will show all invoices you currently have outstanding.

The screenshot shows a user profile page for 'Kumba Bokoka' at 'The Pensions Management Institute'. The navigation menu includes 'About', 'Participation', 'History', 'APTitude', 'CPD', 'Direct Debit', 'Directory Profile', and 'Documents'. The 'Participation' tab is highlighted with a red circle. Below the navigation, there are sections for 'Membership', 'Addresses', 'Contact Tags', 'Social profiles', and 'Relationships'. The 'Open invoices' section contains a table with the following data:

	Pay	Invoice	Date	Description	Due Date	Amount	Balance Due
▶	<input type="checkbox"/>					85.00	85.00
▶	<input type="checkbox"/>					85.00	85.00
Total Balance Due							170.00
Total Selected							0.00

Below the table is an 'Add To Cart' button.

Should you wish to pay for by debit/credit card, please select the invoice(s) in question and select 'Add to Cart.' The item(s) will now be in your basket ready for payment.

Open invoices

Pay	Invoice	Date	Description	Due Date	Amount	Balance Due
<input checked="" type="checkbox"/>					85.00	85.00
<input type="checkbox"/>					85.00	85.00
Total Balance Due						170.00
Total Selected						85.00

 [Add To Cart](#)

1.4.1 PDF Invoices

1. To view downloadable PDF invoices, click on the 'View Receipts and Invoices' located to the left hand of the screen.

ID

Member type Non Member

Status Active

[PRINT INFO](#) [PUBLIC PROFILE](#)

[RESOLVE DUPLICATES](#)

[VIEW RECEIPTS AND INVOICES](#)

[ORDER](#) [REGISTER](#) [EMAIL](#)

[UPGRADE](#) [REINSTATE](#)

[MEMBERSHIP INVOICE/RECEIPT](#)

[Empty Cart](#)

2. You will then need to click on the PDF icon to download the invoice(s). The download will include all open invoices and there is not an option to download individual invoices at present.

View Receipts and Invoices

View any receipts and invoices below. Click on the PDF export for a printable copy or to email a copy.



1 of 1 Find | Next

 **Pensions Management Institute**
Moving pensions forward

Devonshire House
60 Goswell Road
London
EC1M 7AD

Company Number: 01262100

T: +44 (0)20 7247 1452

2. VQ Registrations

2.1 IMPORTANT PLEASE READ FIRST

To register on to one of our Vocational Qualifications you will need first ensure that the organisation you work for is a PMI Examination Partner. If you are unsure, please contact us for clarity.

You **WILL NOT** be able to register onto one of the following courses if you do not follow as above. This applies to:

APE, CPE, CPA, and DPA qualifications.

Presently these courses are all undertaken in-house for which the PMI is the awarding body, we do not run any of the training involved nor supply study materials; this is the responsibility of the organisation.

For these reasons, inter alia, we require all interested organisations to become PMI Examination Partner, so that we may assess and determine whether the courses (highlighted in red above) can be undertaken at your organisation(s).

For more information, please refer to the FAQs section on the [relevant](#) qualification's webpage. You will need to scroll towards the bottom of the page.

- [Award in Pensions Essentials \(APE\)](#)
 - [Certificate in Pensions Essentials \(CPE\)](#)
 - [Certificate in Pensions Administration \(CPA\)](#)
 - [Diploma in Pensions Administration \(DPA\)](#)
-

2.2 Registering for the APE, CPE, CPA, DPA

If you would like to register for one of the VQ qualifications mentioned above, please contact Kumba Bokoka (PMIqualifications@pensions-pmi.org.uk) as we will first need to ensure that you meet the criteria detailed in section 4.1.

N.B Before submitting new registrants, please ensure that they currently hold a PMI account or that one is created prior to registering. Details of how to create an account can be found in section 2. ²

3. Competency Framework

If you are unsure of which qualification is best suited for you and your career aspirations, please see our Competency Framework webpage [here](#)

Click [here](#) to view/ download a detailed guide on the Competency Framework. The table below provides a basic overview, please note we no longer offer the DC Governance course.

PMI Qualification Levels

Role	Level	PMI Qualifications
Support	2	Award in Pension Essentials
Supervisor	3	Certificate in Pension Administration Certificate in Pension Essentials Award in Pension Trusteeship Certificate in Pension Trusteeship
Manager	4	Certificate in Pensions Calculations Retirement Provision Certificate Certificate in DC Governance Certificate in Pension Scheme Member Guidance Diploma in Professional Financial Advice
Senior	5/6	Diploma in Retirement Provision