



**Pensions
Management
Institute**
Moving pensions forward

Registered Office:
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Certificate in Pension Scheme Member Guidance

2023 REGULATIONS

It is a condition of acceptance of a qualification registration that the candidate has carefully read these regulations (ticking the appropriate box on the entry form as confirmation) and agrees to abide by them.

1.MEMBERSHIP: In order to attempt this qualification it is necessary to be a member of PMI (student membership). Those who are not members can become Student member at the same time as application. Those who are members should ensure their membership remains up to date during the study period.

2.ONLINE LEARNING MATERIALS: It is necessary to have completed and passed the multichoice tests and assignments within the online learning programme in order to submit an entry for the oral assessment. Further details about the online tests and assignments are provided in separate guidance notes and in the study timetable.

3.ORAL ASSESSMENT: The fee for the qualification includes one attempt at the oral assessment subject to successful completion of the on-line tests and assignments plus. maintaining membership status where necessary. Should it be necessary to re sit the oral assessment a separate fee will be payable.

4.ORAL ASSESSMENT ENTRY: Candidates are responsible for ensuring that they complete the appropriate oral assessment entry form and return it by the published closing date for entries. The form is available within the online learning programme.

A suitable telephone number must be supplied. This number will be used by the PMI Assessor to undertake the oral assessment.

Please supply a valid and correct email address as your acknowledgement will be sent via this method. If your email needs updating please confirm this to the PMI as soon as possible.

5.ADDITIONAL INSTRUCTIONS: Additional instructions for candidates will be sent via email. These will contain further guidance on the conduct of the oral assessment.

6.ORAL ASSESSMENT ENTRY DATE AND ACKNOWLEDGEMENT: The date applicable will be made available to the learner directly via email.

All entries will be acknowledged. Any candidate who does not receive an acknowledgement within a reasonable time should contact the Institute before the closing date for acceptance of entries. Candidates are advised to check their acknowledgements carefully.

7.FEES AND PAYMENTS: All fees can be found on the PMI website by visiting the CPSMG qualification page



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Study Material will only be issued ONCE FULL PAYMENT HAS BEEN RECEIVED.

8. WITHDRAWAL FROM THE ORAL ASSESSMENT:

Withdrawal of entry can be found under the 'deferral and withdrawal' policy here - <https://www.pensions-pmi.org.uk/pmi-academy/wider-information-set/>

- 9. SPECIAL CIRCUMSTANCES:** At the discretion of PMI special arrangements can be made for candidates for reasons of illness, disability or similar. Applications under this regulation MUST be made in writing and supported with medical evidence, at the point of entering the oral assessment but no later than 6 weeks before the date of the oral assessment. Applications after that time period will only be considered in the case of sudden illness or accidental injury (again, only if supported with medical evidence).

- 10. ORAL ASSESSMENT PROTOCOL:** In order to undertake the oral assessment candidate must agree a suitable date/time in which they can access a telephone in order that they can receive a call from the appointed assessor. The oral assessment should be undertaken in a private room or office.

All oral assessment telephone calls are recorded and stored for moderation purposes. Calls are stored for 1 month after the results have been issued. Calls are stored securely and are only used for oral assessment purposes.

- 11. CONDUCT OF THE ORAL ASSESSMENTS:** The conduct of the oral assessments is under the control of the Institute.

- 12. LIABILITY:** If the Institute, for reasons outside its control, should find it impossible to hold any of its scheduled oral assessments, or if a candidate's completed transcript should be lost or destroyed, the Institute's liability shall be limited to a complete refund of the fee paid in respect of the qualification concerned.

13. RESULTS:

- (a) The decision of the Qualification Committee is in every case final. Requests for confirmation or reconsideration of the results should be directed to the Qualifications Department
- (b) The oral assessment results will be sent to candidates as soon as they are available. The Institute reserves the right to publish oral assessment results, whether successes or failures.

- 14. NOTE** – your entry to any part of this qualification cannot be transferred to another individual and, once selected, assessment dates cannot be transferred.

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