



PMI Exam Guide

The Pensions Management Institute (PMI)

Introduction

This guide will help assist you with the following:

- Frequently asked questions
- Online exam expectations
- What the exam portal will look like on exam day
- How to use the PMI exam booking system
- TestReach remote invigilation/proctoring protocol

Frequently Asked Question's

What happens if my internet connection fails during an online exam?

If your internet connection fails during an exam, we would request that you get in touch with TestReach directly asap so that they can advise you on next steps.

We kindly request you to copy the Qualifications team into all correspondence:

TestReach	<ul style="list-style-type: none">• email: support@testreach.com / customersupport@testreach.com• call +44 (0)2034758685
PMI	<ul style="list-style-type: none">• email: pmiqualifications@pensions-pmi.org.uk• Call: 02073927422

Where do you hold your exams?

All PMI exams are currently being held online. Learners will be required to download the [TestReach application](#) on the system/device which they will use to sit the exam. You can take your exam in an office/work environment, or in the comfort of your own home.

How do I take an online exam?

You will be required to book yourself on to the exam you wish to sit via the PMI website. After bookings close you will then be contacted by TestReach typically a few weeks before your exam, who will provide you with log-in details for your account for the TestReach application to take your proctored exam.

Are there any pre-requisites to sit for a PMI exam/qualification.

There are no minimum requirements to sit any [PMI qualifications](#). Learners are advised to opt for a course/PMI Pathway as per their career aspirations. We would advise looking in depth at qualification specification/syllabuses available on each qualification page.

What type of questions can be asked in an online exam?

The assessment model differ for each qualification. For example, the Retirement Provision Certificate (RPC) qualification is based on multiple choice questions, whereas the Certificate in Pension Calculations (CPC) is designed in a calculation-based format. The Advanced Diploma in Retirement Provision (ADRP) is assessed by mainly multiple choice, with the Professionalism and Governance unit assessed via short answer/essay style questions.. For further details, learners are advised to visit the webpage of the qualification they are enrolling for, to get specific guidance.

What should I do if I miss my exam?

You can submit extenuating circumstances if your reasons for missing the exam were exceptional and beyond your control, which will then be reviewed before a decision is made. However, as per our [exam policy](#), if you are a 'no show' for your exam and we do not receive a sufficient reason as to why you were not present, you would be required to book on again for the next sitting at the full cost of the exam if you wished to still sit it.

TestReach support team, who will attempt to troubleshoot and support you to get yourself reconnected with your exam and invigilator. If the problem continues to persist, you will be directed to the PMI Qualifications team where we will advise on the next steps to take/

When results of my online exam will be issued?

- Multiple choice exam results are issued within 2 weeks
- Short answer/essay style exams are issued within 1 month

Please ensure you check the respective webpage of the exam that you sat for this information. Exam release dates will be posted on there, so you are aware as to when you can expect to receive your results.

Will I need ID for my exam?

Yes, you will need to bring this to your exam. Approved Identification documents are;

- Passport
- Provisional/Full Driver's Licence
- Work ID
- National ID Card
- EU ID Card
- Birth Certificate

Do I have to stay for the whole duration of the exam even if I have finished?

No, you do not have to stay for the duration of your exam. If you are happy with the answers, you have provided and have clicked on the 'submit' button, you will be allowed to finish early.

Are there any minimum system requirements to take the examination?

There are minimum system requirements to sit your exam online. You can check to see if you fulfil these technical requirements by taking a look through the TestReach Remote Invigilation Protocol PDF linked [here](#).

How is an online proctored exam different to an exam taken in a test centre?

- The only difference is that the exam is taken online, so you can sit the exam in the comfort of your own home if you wish to do so.
- By using TestReach we are ensuring that we are fully compliant with Ofqual regulations.
- Each learner is invigilated online by their exam proctor, who can see/hear the learner, as well as having a visual of their screen too, to see what the learner is viewing.
- Certain pre-exam checks are also taken beforehand, to ensure that the learner's environment is acceptable for sitting an exam. All these factors ensure that the exams maintain their integrity and are in no way compromised by being held online.
- The TestReach Desktop App is very robust, safe to run and has been rolled out across the UK, in local government, emergency services, universities, pension administrators, financial corporations, etc. without any negative reports.
- Once the exam is completed, the TestReach App can be closed by clicking the button and has no notification service or any other configuration that runs whilst the application

What happens during the environment checks for remote invigilated exams?

Please refer to the information in the [TestReach Remote Invigilation Protocol](#) PDF, which describes the validation protocol and the steps that trained invigilators will take to verify the identity of the candidate and to ensure that the candidate's test environment is secure – this is for your information, and to know what to expect during the online exam.

Can I take a break during my exam?

Although comfort breaks are of course allowed, you should inform your invigilator beforehand (like you would in an exam centre). Your exam will NOT be paused/stopped while you have breaks, so please be mindful of how much time you have remaining for your exam.

Can I eat or drink during my exam?

All PMI exams should be taken in exam conditions. Although snacks are allowed, eating a full meal (breakfast/lunch/dinner etc.) is not permitted.

Why do I need to confirm that I agree to the PMI Terms and Conditions before I can enter the examination?

Even though taking an examination at home may be perceived as being a more relaxed environment, you are under strict examination conditions. For example, if you were to take your examination in a physical test centre, you are required to conduct yourself in

accordance with the PMI candidate guidance in operation at the time and abide by the Examination Rules and Regulations. Any breaches of these could result in your examination being flagged to the PMI Qualifications team to review as part of the [PMI Malpractice Policy](#)

Do I need to download any software onto my computer to take the examination?

Yes, you will be required to download the TestReach application to your device (laptop/desktop computer). If you are going to be taking your exam using a work device, we strongly urge you to get in touch with your IT team ASAP, who may need to enable certain permissions for the application to be downloaded and accessed. It is crucial that this is actioned in good time and as early as possible, as all learners are required to schedule themselves onto their exam 72 hours before they are due to sit the exam, to pass all the system checks, to avoid any issues on the day of the exam. A link to download the [TestReach application](#) is available on our qualification webpages.

Am I eligible for extra time during the exam?

Yes, if you have any medical conditions that inhibit your ability to complete an exam within the standard timeframe, e.g., dyslexia, or ADHD then we can offer you an additional 25% extra time on top of the standard exam time. We would need supporting evidence, such as a medical note from your doctor, to be provided to us, which would then be reviewed by a member of the team and a decision then made. If you require extra time, the PMI Qualifications team will get in touch in the run-up to your exam and request it from you in due course.

Exam guidance (TestReach)

This section provides detail regarding device requirements and compatibility

Candidate Exam Checklist for Remote Invigilated Exams

Please ensure that you read this document thoroughly. It is your responsibility to ensure you understand, are familiar with and adhere to the regulations and protocols herein. Failure to comply with any of the procedures outlined in this document may result in your exam being terminated / results not being issued.

Computer requirements:

- Laptop / computer with 4GB of ram (no chrome books, tablets or surface pro)
- A Windows v7.0+ or Mac10.10+ operating systems
- Intel Core i3 (or equivalent) and 4GB RAM
- A working webcam that can be used to scan the room, microphone and speakers
- Internet connectivity with continuous internet speed of a minimum of 516kbps

Before your exam please ensure that you have downloaded the TestReach application (as per your enrolment email).

Make sure you have completed the webcam check and confirmed your exam slot **at least 3 days in advance of exam day.**

NOTE: Candidates who do not complete this process 3 days in advance will be considered a no-show and will not be able to sit their exam.

- Make sure that you have completed the TestReach Test Tutorial
- You must ensure that you have your TestReach user information with you – **user ID and password.**
- **Do not forget your signed Photo ID** – either passport or driving license only
- You must not be interrupted throughout your exam. Please make sure your room / space is private and well lit.
- You will be asked to scan the room for a 360° view using your monitor / webcam.
- Ensure that your computer area is free of all clutter and unauthorised materials.
- Your mobile phone should be turned off and put out of reach once you are connected with your supervisor.
- If you are in a room with others sitting your exams please ensure that you have headphones in order to hear the supervisor.
- Please do not have a second monitor on your desk or within reach (unless your organisation have informed you that a second monitor is allowed)
- The only authorised items allowed for this exam will be stated to you by the Pensions Management Institute

- You may not move around the test site – i.e. no wandering around the room. You need to remain in the webcam viewing area at all times.
- Ensure that you do not block the webcam for any reason.
- No smart watches are allowed. You will be asked to show your wrists to the supervisor.
- You can take Comfort Breaks allowed during this exam, but you should inform your remote invigilator before doing so.
- Please behave in a suitable manner towards the Supervisor, comply with any procedural requests, and respond to all validation questions.

***Note: If you have any difficulties with regard to logging on for your exam please contact:**

+353 (1) 699 1385 / +44 (0)20 34758685

support@testreach.com <https://www.testreach.com/candidate-support.html>

For information on the availability of TestReach service see:

<https://status.testreach.com>

Validation Protocol for Candidates

Introduction

The below information describes the validation protocol and the steps that trained invigilators will take to verify the identity of the candidate and to ensure that the candidate's test environment is secure – this is for your information and to know what to expect.

Prior to Exam

There is a three-step process for preparing for exam day. Candidates must confirm or book their exam **3 days in advance of exam day**. Candidates who do not complete this process 3 days in advance will be considered a no-show and will not be able to sit their exam.

1. Download the TestReach application
 2. Complete the system check
 3. Confirm or book your exam
-
- Candidates will receive an email with login details from TestReach with the subject "TestReach New Account". If you cannot find this email, please check your spam folder.
 - Please ensure that you have your user ID and password with you on the day of your exam.
 - All candidates are advised to take "Test Tutorial", which guides you through taking an exam on TestReach. We suggest that you go through this tutorial by clicking "Enter" so that you can familiarise yourself with the exam canvas. You can use this tutorial multiple times and your answers will not be recorded.
 - All exams need to be booked or confirmed 3 days in advance.
 - Candidates are also advised to be in their chosen exam location 20 to 30 minutes before their scheduled exam start time in order to login, enter exam and go through the system checks. 15 minutes before exam, the "connect" option will activate, and candidates can click on this to commence the pre- validation process.

Note: Candidates will be permitted to commence the exam up to 30 minutes after the scheduled start time. The duration of their exam remains the same. If a candidate has not connected within 30 minutes, their exam will expire and they will not be able to do the exam.

Day of Exam

- Ensure that you are all set to take your exam and you have followed all guidance/instructions sent to you.
- Login into TestReach using your User ID and Password.

It is advised that all candidates enter exam 15 minutes before start time in order to allow the candidate to go through pre - validation process with their Supervisor.

- Select "Connect to Supervisor". Please note that the connection to the Supervisor may not be immediate but that the Supervisor is aware that you are ready to start your exam.
- Once you are connected, Supervisor can immediately see: the candidate's desktop / screen, a 'chat box' for any Instant messages between the supervisor and candidate and a live audio / video of the candidate via webcam.
- Supervisor will advise candidate of pre-validation process before they begin their exam via audio.

Authentication / Validation Process

There is a list of steps taken to verify a candidate's identification and secondly that the testing area is secure.

- The supervisor will ask you to show your photo ID to the camera.
 - This ID should either be a current passport or driving license, with photograph and signature.
- The candidate will be asked to pan their monitor / camera around the room to get a 360° view – the supervisor will need to make sure that the candidate pans the whole area. This is to ensure that:
- There is no second monitor (unless the PMI have confirmed that this can be used) / any other computer visible in the room
- Any phone visible has been put out of reach
- There are no notes / wall boards with information on them
- The candidate will also be asked to scan their desk (including any shelves under the desk) – this is to make sure that there are no phones, books, post-its etc. nearby. As there are no resources allowed for this exam other than water / drink the test area should be clear.
- If the supervisor observes any unauthorised items, they will request that the candidate removes them from the testing area.

Monitoring Protocol

During the exam the supervisor is required to monitor the candidate via webcam. The supervisor is also able to monitor audio feedback to ensure that there are no verbal answers or communication from any outside source. The supervisor will be able to:

1. see the candidate via webcam and see the candidate's screen
2. use a chat box to communicate to the candidate
3. hear the candidate and all times and talk with them when required.

When monitoring the exam, the supervisor will watch the screen at all times. They will check for: Eye movement / Head movement / Hand movement / Talking or mouthing or other indications of external communication

If the supervisor notices any of the above behaviours they will send the candidate an Instant message or talk to them asking them to refrain from the behaviour e.g. "please keep your eyes on the screen", "please keep within view of the webcam", "there is no talking allowed – thank you", etc.

If the supervisor is required to log an infringement, the supervisor will click on the Log Infringement button. The supervisor will click on the appropriate infringement described and then on the 'Take Action' button.

By clicking the 'Take Action' button this will record the exceptional activity onto the 'Actions Log' and will automatically send a message to the candidate saying an exception has occurred. The candidate MUST click OK to this in order to resume their exam. – This can be seen by the supervisor on the screen share.

Please see the Infringement Protocols for specific Major / Minor Infringement.

It is at the client's discretion to decide if the test should be allowed or not or what post-exam action to take where any major infringements are recorded.

There are 2 automatic time warnings given – one with 30 mins to go before the end of the exam and one with 5 minutes to go.

Sample Infringement Guidelines

Minor Infringements

A Minor Infringement is one that is deemed a low-level exception. Minor Infringements may not compromise the test and can be rectified immediately however all minor infringements are logged.

- Leaning out of view of the camera.
- Blocking the computer camera.
- Commencing hand movements that could be interpreted as sign language.
- Glancing at other areas of the room that the supervisor cannot see (in this instance prior to raising an infringement the supervisor will query the candidate and ask the candidate to pan the room and in particular that area to check)
- Behaving in an unsuitable manner to the supervisor.

Major Infringements

A Major Infringement is one that is deemed a medium level exception. One that does not compromise the test and one that is rectified quite quickly with the candidate during the test.

- Accessing (or trying to access) another site / document when online
- Referring to any material – if there are no resources allowed.
- Not removing objects that are deemed interactive such as smart watches.
- Not agreeing or responding to the validation questions asked by the Supervisor.

Blocker Infringements

A Blocker Infringement is one that is deemed a high level exception. One that compromises the test and causes the test to be terminated. Supervisors will warn the candidates in advance.

- Leaving the test centre area for ANY reason (if you want to use the bathroom, you should inform the remote invigilator beforehand)
- Communication of any sort with a third party.
- Mobile phones are not to be used in the testing area at all once the exam has commenced.

The supervisor is to alert the candidate that an action has been recorded. The supervisor will then log all the exceptional actions and inform the client via an actions log.

Actions taken if an infringement occurs

- There is an actions log available to the supervisor which will log any infringement made (including any notes written by the supervisor) and be timed and dated automatically.
- If the supervisor notices any suspicious activity the supervisor will update the feedback log to indicate that an exception has occurred and detail the activity in question.
- A recording of the exam will also be taken to provide supporting evidence.

Candidate Issues on Exam Day

Minor Incidents

It is the candidate's responsibility to ensure their computer:

- is in good order
- has sufficient memory
- has up-to-date software, drivers etc
- has good internet connection speeds
- is plugged into a power source so you have enough power for the duration of the exam
- all apps running in the background are closed in case it impedes with the progress of the exam

If the candidate's equipment fails on exam day then there is limited troubleshooting steps that the TestReach support team can work through.

Candidate experiences poor internet connection at the time of their exam.

A candidate may have their exam resumed up to a maximum of 3 times. After this they will be asked to contact their examining body to rebook their exam.

Candidate experiences an issue local to their device i.e. issues with their webcam, sound card, graphics card etc.

Our customer support team will spend up to a maximum of 15 mins on an in-bound telephone helping the candidate to resolve issues local to their device.

At this point, the customer support team will end the call and advise the candidate to contact the examining body to see if there is a possibility to rebook their exam.

This is to ensure that our customer support team have the required availability to provide a high level of support to all candidates taking an exam at that time.

Candidate is late

Candidate is late for their exam or experiences issues logging onto the TestReach app. If a candidate calls the customer support line within 30 mins of their exam start time, the customer support team will help the candidate to resolve the issue. If a candidate calls after 30 mins, they will be advised to contact the examining body to rebook their exam.

Major or Critical Incidents

In the very unlikely event that the TestReach service has a major or critical incident, candidates should go to <https://status.testreach.com>

This website will keep you up to date on any actions you should take and when we expect the service to resume.

In the event of a disruption to our service, our support lines would see naturally see a spike in activity and it is unlikely that you will be able to speak to an agent. The <https://status.testreach.com> page is our main and sole source of communication to candidates during this time.

Exam Registrations: The essentials

This section takes you through how to use our exam booking system

In order to sit any of the PMI exams online, you would need to be a student member of the PMI. Our student membership year runs from 1 September to 31st August. Please note, you do not have to apply for a student membership separately as this would be added to your order while registering for the exam.

As PMI has transitioned to an entirely online registration process, the following steps must be completed before submitting your application:

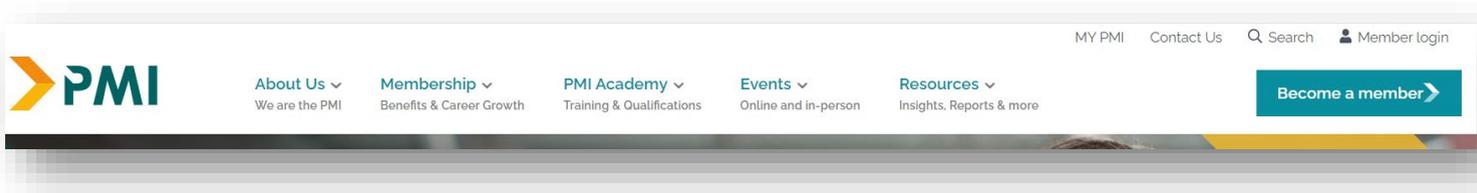
1. **Ensure you have a [PMI account](#).** If you do not have one, or if you are new to the PMI, you will need to create an account first. ([please click here for instructions](#)).
2. **If you wish to bill your company** for the exam, please ensure the company's details and address are set as the preferred billing address. Instructions for this are provided below*.
3. **For company administrators:** If your company has a designated contact responsible for booking learners on to PMI exams, they can complete the booking on your behalf, if they are registered as a company administrator in our database. This ensures the exam booking invoice are invoiced to the company for payment.

Your PMI Account

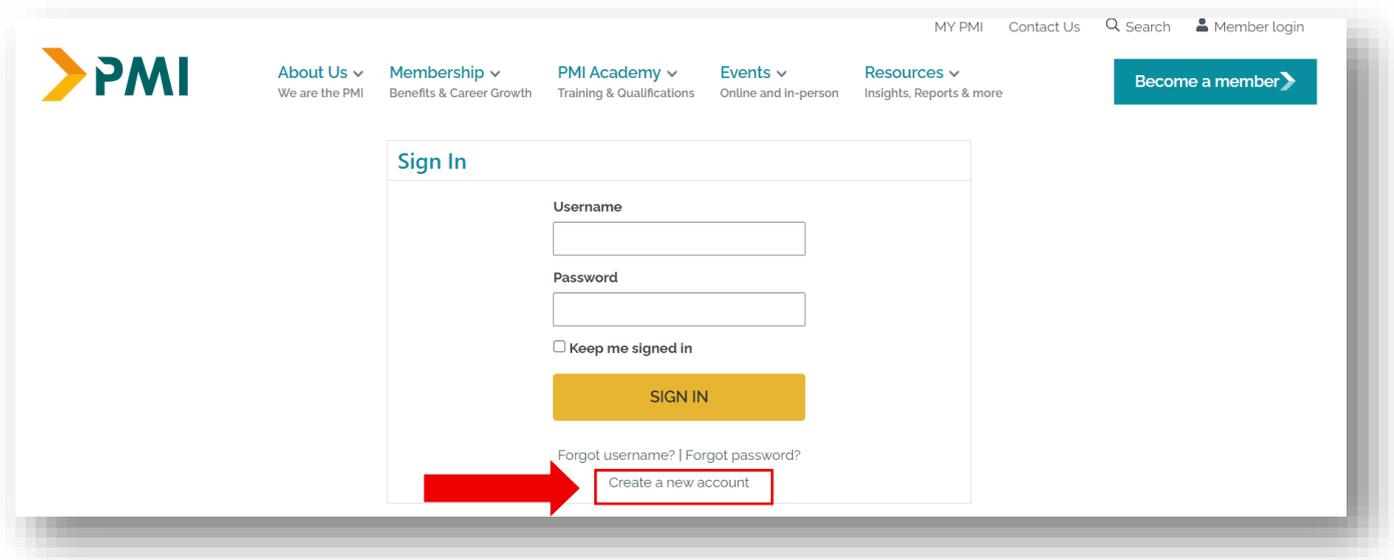
New members

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

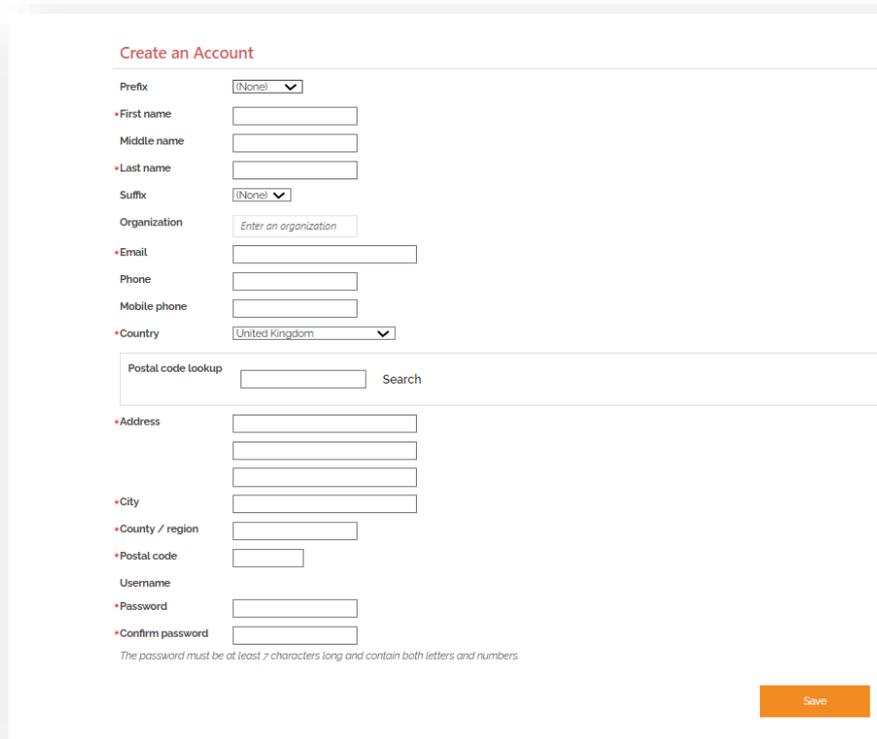
Go to the PMI website and click on the "Member login tab" in the top right corner or follow this [link](#).



1. Click on "**Create a new account**"



2. Fill in your details, making sure you do not leave any of the asterisked fields empty.



Create an Account

Prefix (None) ▾

• First name

Middle name

• Last name

Suffix (None) ▾

Organization

• Email

Phone

Mobile phone

• Country United Kingdom ▾

Postal code lookup Search

• Address

• City

• County / region

• Postcode

Username

• Password

• Confirm password

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

Save

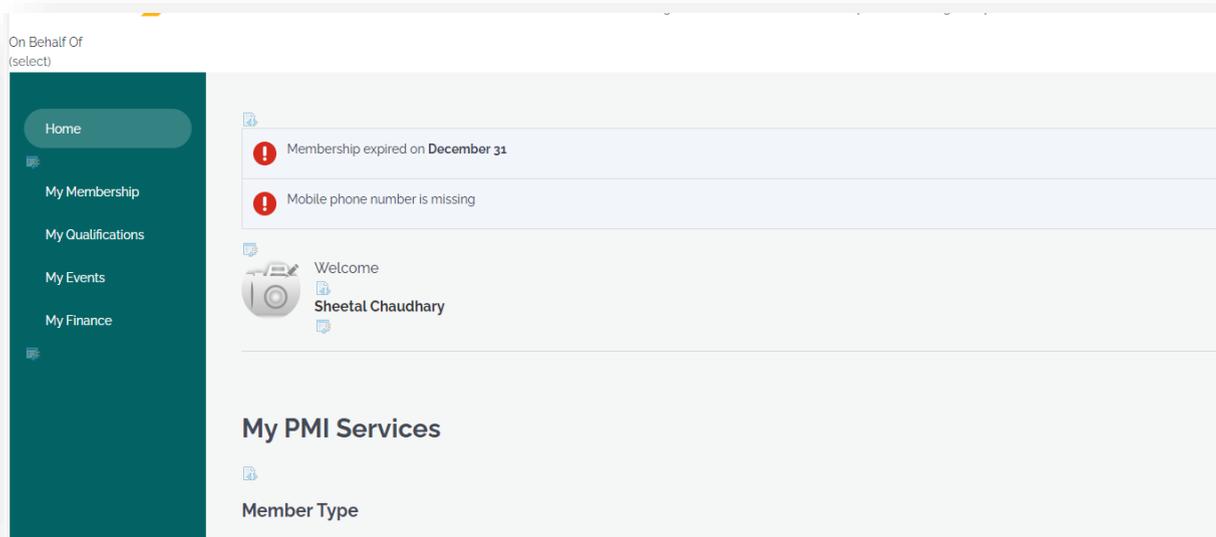
If your organisation doesn't appear on the drop-down menu as you type, please contact us as we will have to add your organisation to the portal.

N.B – you can still register prior to PMI 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 (My Membership>Information)

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.

3. 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)

Home

My Membership

My Qualifications

My Events

My Finance

Membership expired on December 31

Mobile phone number is missing

Welcome
Sheetal Chaudhary

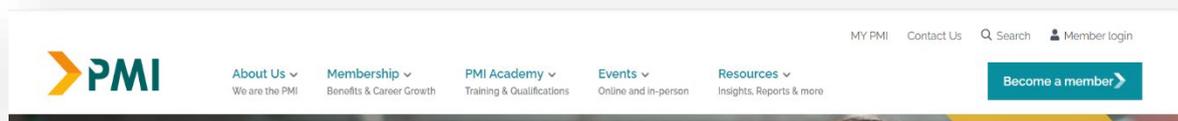
My PMI Services

Member Type

Existing members

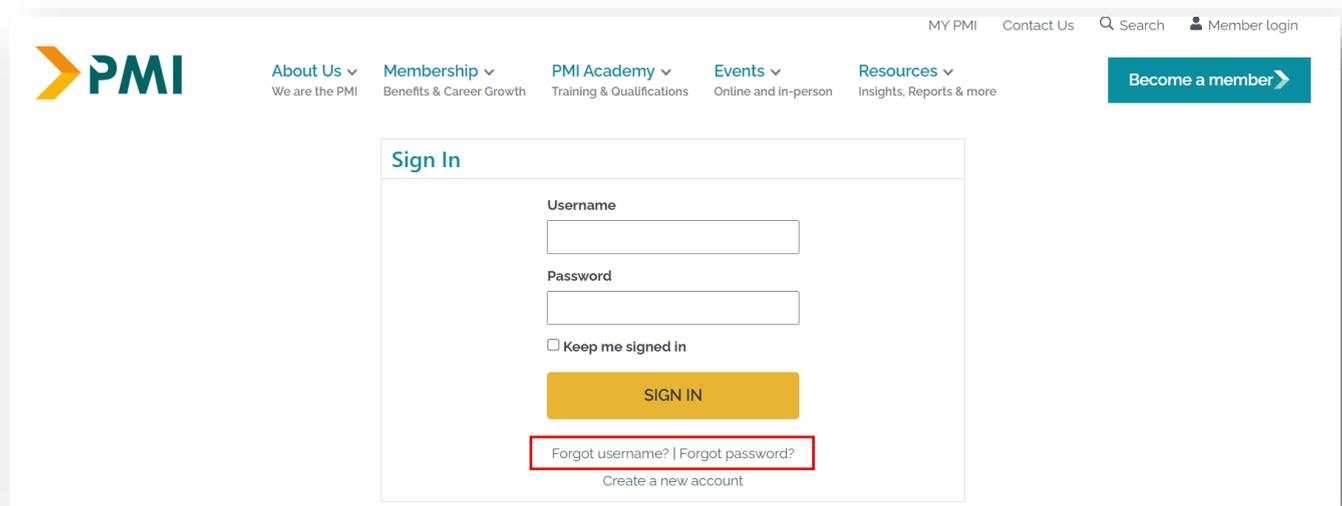
If you have **previously** completed an exam, qualification or attended an event with the PMI, it is likely that you already have an account with us. Please follow the steps outlined below, as attempting to create a new account will result in a duplicate account being created which is not ideal and could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

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

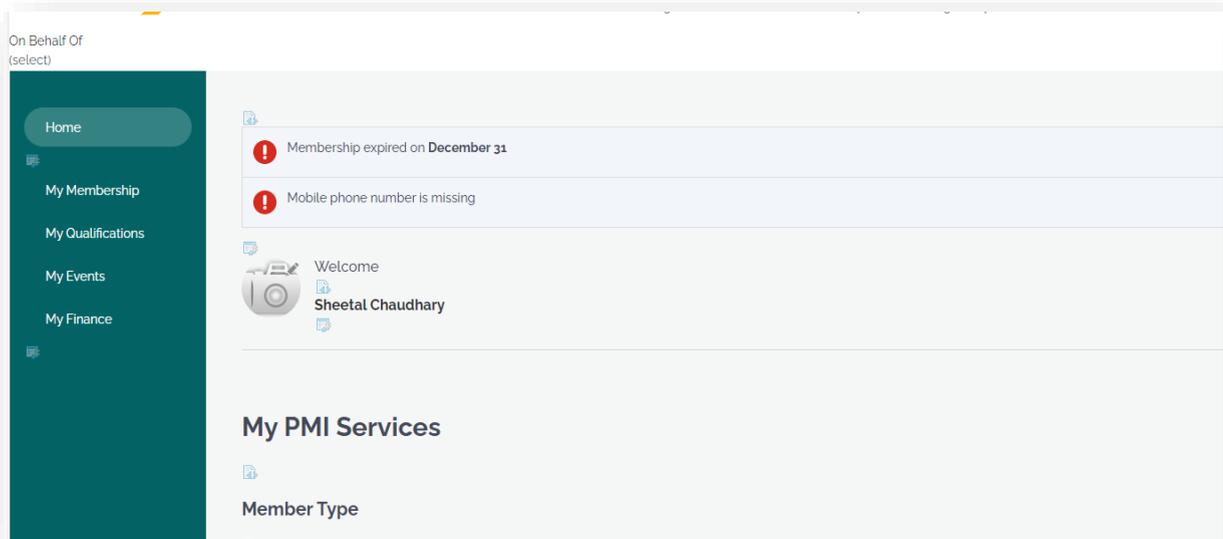


2. If you know the username (email address) and password PMI holds for you, please log in to your account. If you forgot the password or need to reset your password select "Forgot password". A password reset link will be emailed to your email address. Please be sure to check your junk/ spam folders too as sometimes the link can be sent there.

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



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

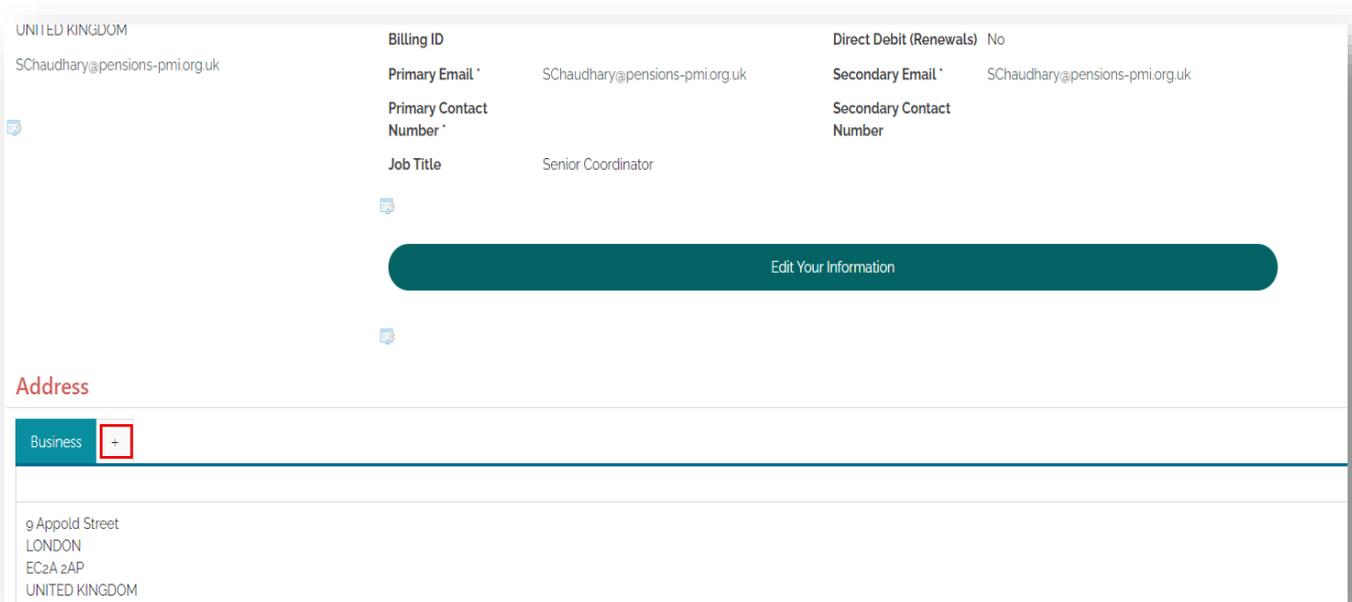


Viewing/ Editing your details

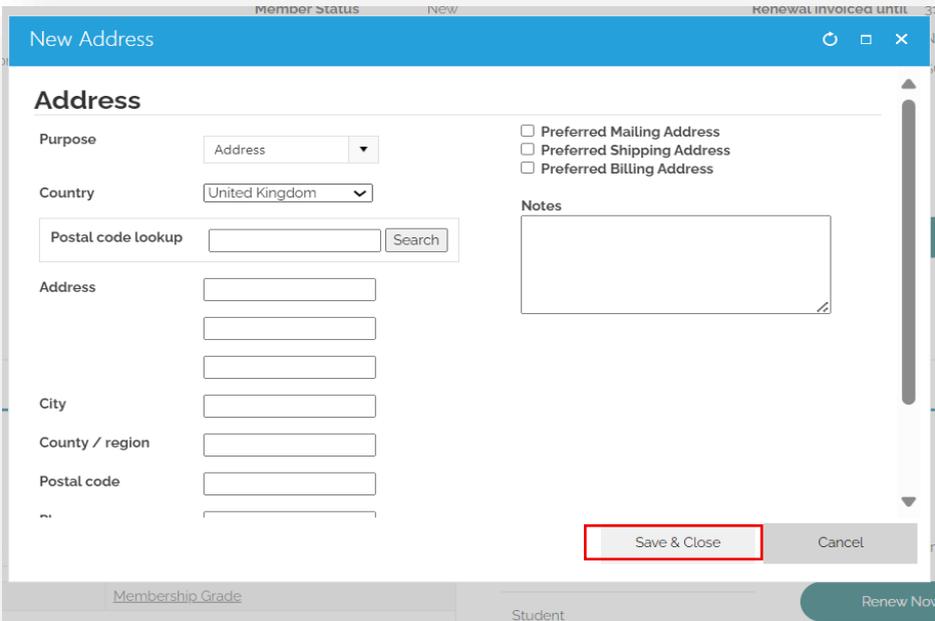
You can edit the information on your profile as often as required. You can store multiple addresses on the system and select a preferred address/ email you would like the PMI to use to contact you. You are also able to change your name, as well update your current employer and change your home/billing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

Updating/ Adding Addresses

- To add additional addresses, expand the Membership tab, then go to information and "+"



1. 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.
2. Once all details have been entered, click 'Save & Close.' The new address should appear. If it does not, you may need to refresh your browser.



The screenshot shows a web application window titled "New Address". The form is divided into several sections:

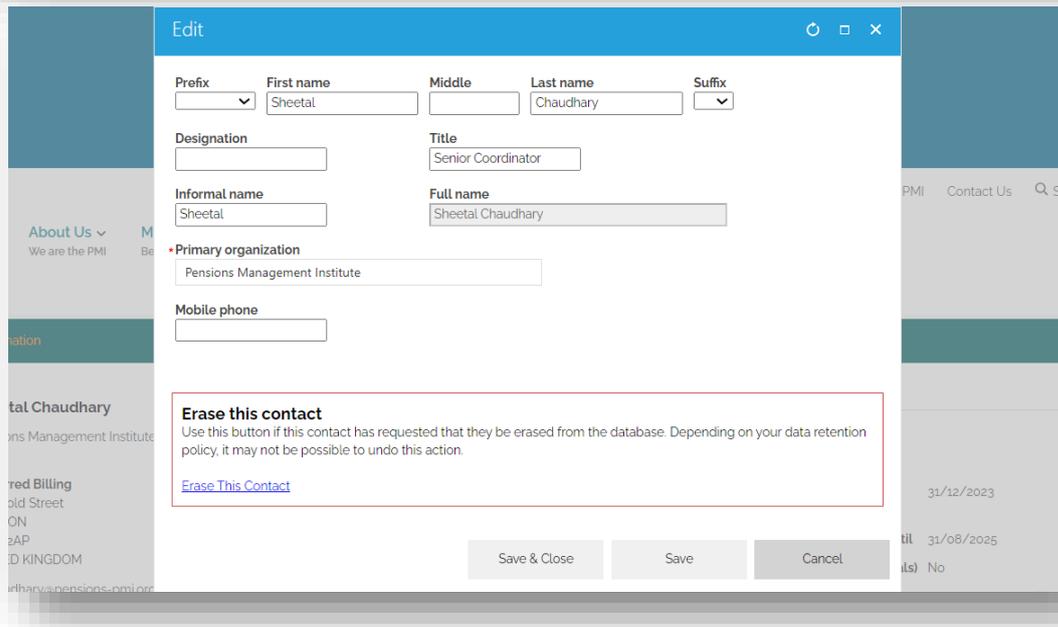
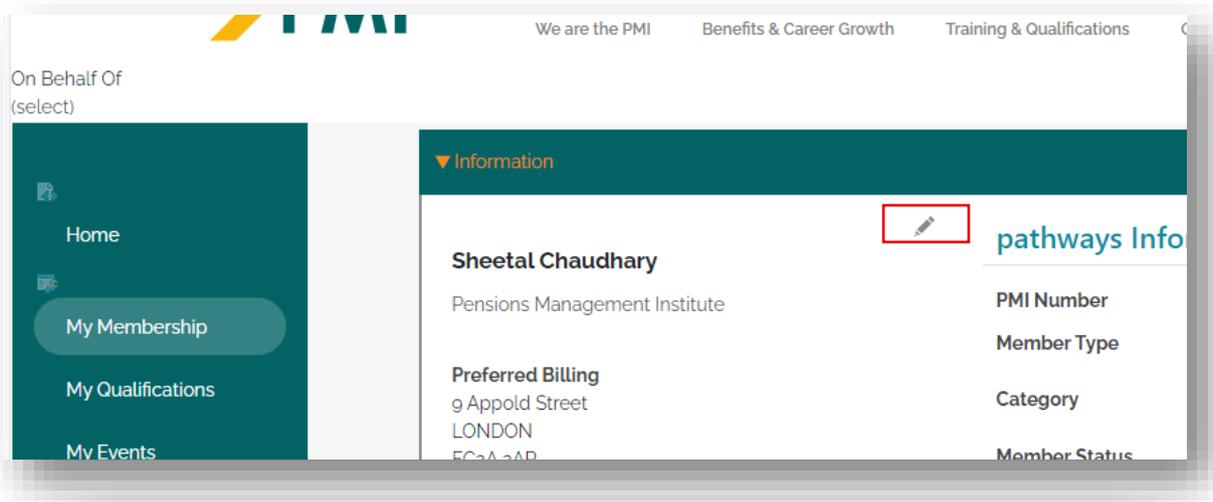
- Purpose:** A dropdown menu currently set to "Address".
- Country:** A dropdown menu currently set to "United Kingdom".
- Postal code lookup:** A text input field followed by a "Search" button.
- Address:** A multi-line text input field.
- City:** A text input field.
- County / region:** A text input field.
- Postal code:** A text input field.
- Notes:** A large text area for additional information.
- Options:** Three checkboxes: "Preferred Mailing Address", "Preferred Shipping Address", and "Preferred Billing Address".
- Buttons:** "Save & Close" (highlighted with a red box) and "Cancel".

At the bottom of the window, there is a footer with "Membership Grade" set to "Student" and a "Renew Now" button.

***Please click on Preferred Billing address in case you want this address to appear on your PMI order transactions.**

Name and Employer Changes

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



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

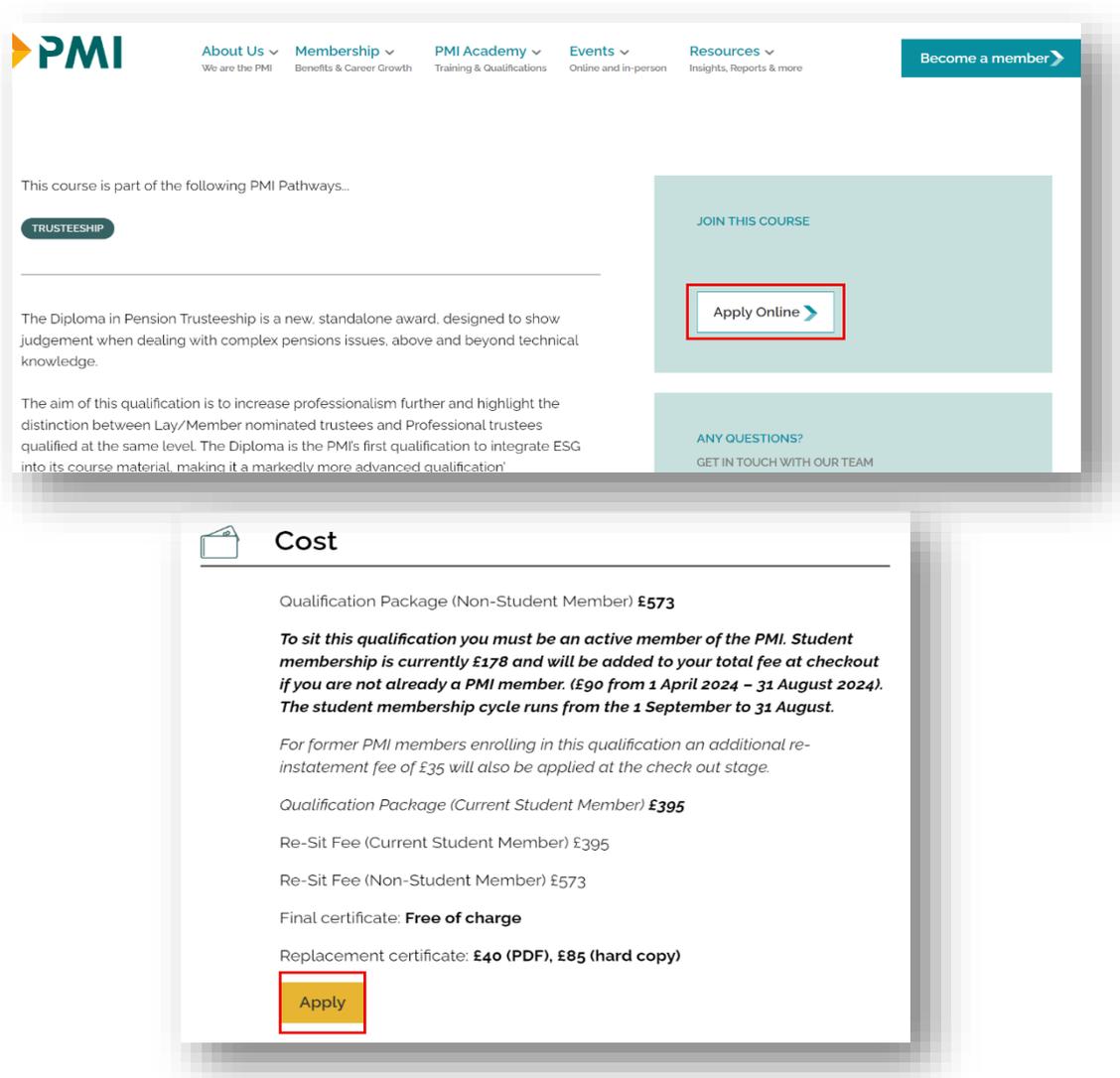
PLEASE DO NOT ERASE A CONTACT. If you no longer require an account or feel that PMI may possibly be holding a duplicate account for you, **please contact us**, and we will rectify this for you. Once erased, it may not be possible to recover an account and all history associated with said account could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

Registering for PMI Exams as a Learner

Once your account has been set up, you are now ready to register onto PMI exams .

This can be done via following the steps below once you have logged in to your [PMI account](#) :

- 1) As an example, let's pretend you would like to book on to the Diploma in Pension Trusteeship (DPT) exam. You would visit the respective qualification webpage through the [PMI website](#).
 - a. Diploma in Pension Trusteeship – The Pensions Management Institute (<https://www.pensions-pmi.org.uk/pmi-academy/qualifications/diploma-in-pension-trusteeship/>)
- 2) When bookings open for the public PMI exams, you will be able to scroll down the respective webpage and locate the 'APPLY' button, which will typically be located on the top right hand side of the webpage and also underneath the 'Cost' section.



The image shows a screenshot of the PMI website. The top navigation bar includes links for 'About Us', 'Membership', 'PMI Academy', 'Events', and 'Resources', along with a 'Become a member' button. The main content area features a 'TRUSTEESHIP' section with a 'JOIN THIS COURSE' button and an 'Apply Online' button highlighted with a red box. Below this is a 'Cost' section with a list of fees and an 'Apply' button highlighted with a red box.

Cost

Qualification Package (Non-Student Member) **£573**

To sit this qualification you must be an active member of the PMI. Student membership is currently £178 and will be added to your total fee at checkout if you are not already a PMI member. (£90 from 1 April 2024 – 31 August 2024). The student membership cycle runs from the 1 September to 31 August.

For former PMI members enrolling in this qualification an additional re-instatement fee of £35 will also be applied at the check out stage.

Qualification Package (Current Student Member) **£395**

Re-Sit Fee (Current Student Member) £395

Re-Sit Fee (Non-Student Member) £573

Final certificate: **Free of charge**

Replacement certificate: **£40 (PDF), £85 (hard copy)**

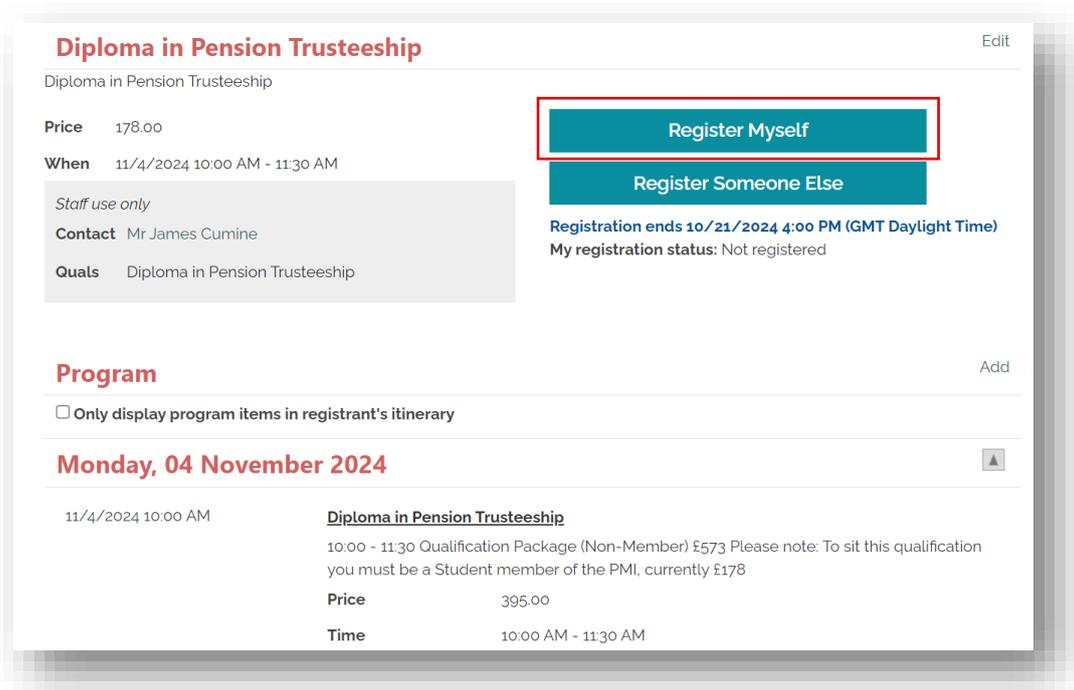
Apply

3) In order to sit the exam, you must read through the important information regarding the exam attached to the respective qualification webpage, below the useful resources section. Please see the example below for the Diploma in Pension Trusteeship qualification:

In order to sit this exam, you must ensure you adhere to the following:

- Ensure you have access to a working webcam as you will be remotely invigilated
- Ensure you have appropriate IT permission to download the Testreach exam app TestReach
- Ensure you have read our policy here before making any bookings
- Ensure you have read the Testreach documentation under 'useful resources'
- Ensure you have read the guidance documents and learning support information
- Ensure you have a look at the study skills website here, for valuable study tips

4) Once you have clicked on 'APPLY' you can then click on the button, 'Register Myself'.



The screenshot shows a registration page for the 'Diploma in Pension Trusteeship' qualification. The page includes the following details:

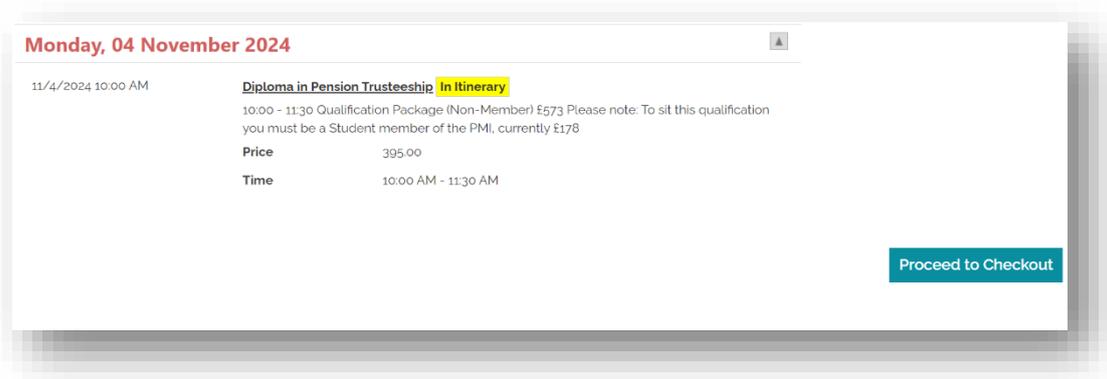
- Price:** 178.00
- When:** 11/4/2024 10:00 AM - 11:30 AM
- Contact:** Mr James Cumine
- Quals:** Diploma in Pension Trusteeship

Registration options are provided as buttons: 'Register Myself' (highlighted with a red box) and 'Register Someone Else'. A registration deadline is noted: 'Registration ends 10/21/2024 4:00 PM (GMT Daylight Time)'. The user's current status is 'My registration status: Not registered'.

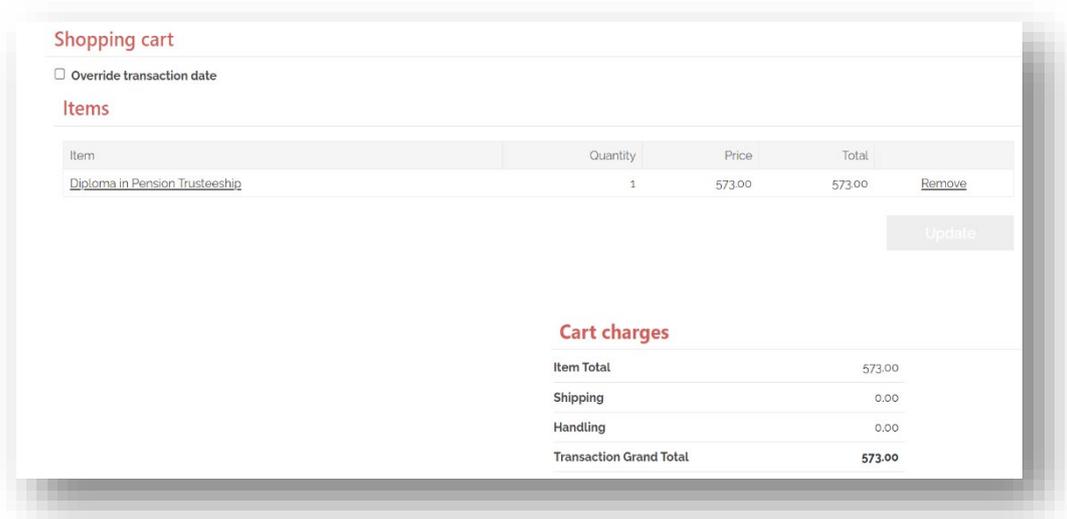
The 'Program' section is expanded to show the following details for 'Monday, 04 November 2024':

11/4/2024 10:00 AM	
Diploma in Pension Trusteeship	
10:00 - 11:30	Qualification Package (Non-Member) £573 Please note: To sit this qualification you must be a Student member of the PMI, currently £178
Price	395.00
Time	10:00 AM - 11:30 AM

- 5) Once you see the exam has been added to your itinerary, you can proceed to checkout.

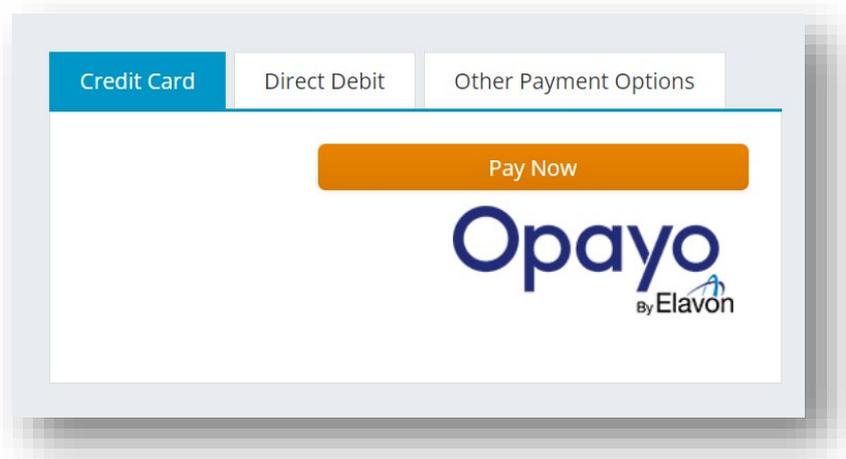


- 6) Once you are at checkout, please ensure that the exam and price is correct.

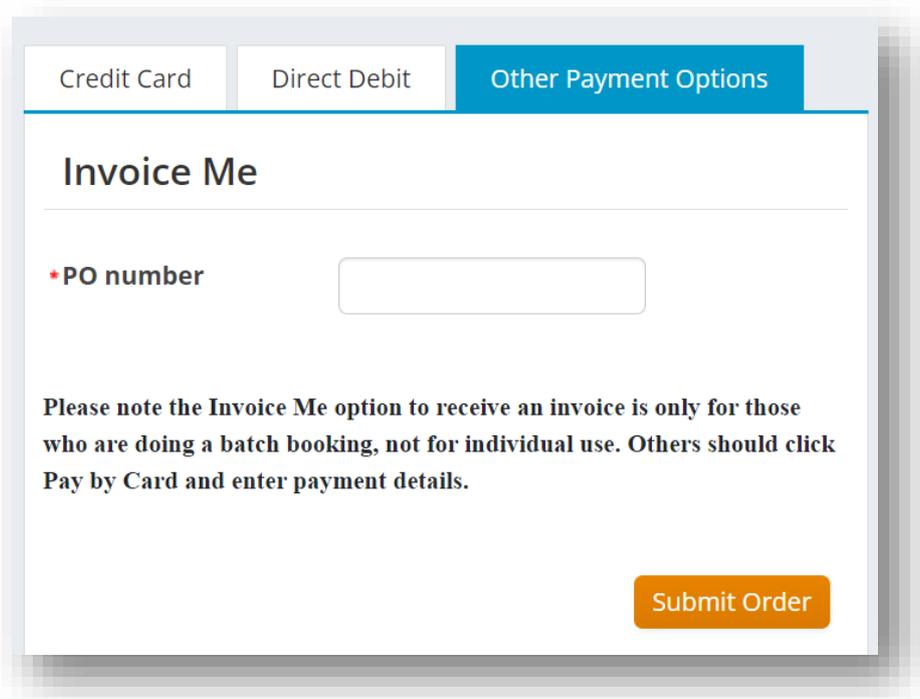


As you can see from the screenshot above, the student membership fee has been added to your cart automatically.

- 7) Once you are happy with the total you can either pay immediately by card or you can generate an invoice and pay via BACS. If you want to pay immediately by card, please click the option to pay by credit card and you can click on 'Pay Now'.



Alternatively, you can click on 'Other Payment Options' if you wish to generate an invoice to pay off later via BACS. You can enter a Purchase Order (PO) number if relevant. If you do not have a PO number, you can simply enter, 'N/A' into that field. Once happy you can click on 'Submit Order'. Your invoice will then be generated over the next 48/72 hours where it can be viewed/downloaded as a PDF and paid off to the PMI. Please note, we would not be able to add the purchase order (PO) once the invoice has been raised, therefore it is important that this information is added (if applicable) at the time of placing the order.



The screenshot shows a web interface with three tabs: 'Credit Card', 'Direct Debit', and 'Other Payment Options'. The 'Other Payment Options' tab is selected and highlighted in blue. Below the tabs, the heading 'Invoice Me' is displayed. Underneath, there is a label '*PO number' followed by an empty text input field. A note below the input field reads: 'Please note the Invoice Me option to receive an invoice is only for those who are doing a batch booking, not for individual use. Others should click Pay by Card and enter payment details.' At the bottom right of the form, there is an orange button labeled 'Submit Order'.

- 8) You will receive a booking confirmation via email confirming your exam booking, and you will also be able to login to your PMI profile which will state which exam(s) you have been booked onto successfully.

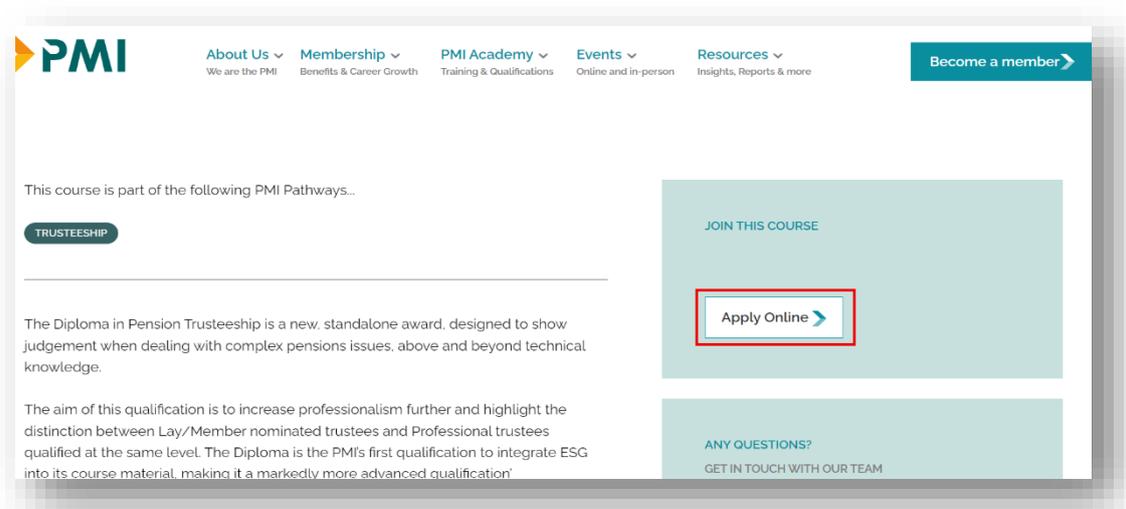
Booking Learner(s) for PMI Exams as a Company Administrator

- You might be assigned as the company administrator of your organisation , which means the point of contact for the company, responsible for booking learners on to their respective PMI exams.
- In case you are not a company administrator and would like to be set up as the admin, please contact the PMI qualification team.
- Company admins will have access to the learner's basic information required to book learners on to PMI exams but will not be able to see any qualification records for those associated learners.

Once your account has been set up as administrator within the PMI database , you are now ready to register your employees on to PMI exams .

This can be done via following the steps below once you have logged in to your [PMI account](#) :

- 1) As an example, let's pretend you would like to book on to the Diploma in Pension Trusteeship (DPT) exam. You would visit the respective qualification webpage through the [PMI website](#).
 - a. Diploma in Pension Trusteeship – The Pensions Management Institute (<https://www.pensions-pmi.org.uk/pmi-academy/qualifications/diploma-in-pension-trusteeship/>)
- 2) When bookings open for the public PMI exams, you will be able to scroll down the respective webpage and locate the 'APPLY' button, which will typically be located on the top right hand side of the webpage and also underneath the 'Cost' section.



- 3) In order to sit the exam, you must read through the important information regarding the exam attached to the respective qualification webpage , below the useful

resources section. Please see the example below for the Diploma in Pension Trusteeship qualification:

Cost

Qualification Package (Non-Student Member) **£573**

To sit this qualification you must be an active member of the PMI. Student membership is currently £178 and will be added to your total fee at checkout if you are not already a PMI member. (£90 from 1 April 2024 – 31 August 2024). The student membership cycle runs from the 1 September to 31 August.

For former PMI members enrolling in this qualification an additional re-instatement fee of £35 will also be applied at the check out stage.

Qualification Package (Current Student Member) **£395**

Re-Sit Fee (Current Student Member) £395

Re-Sit Fee (Non-Student Member) £573

Final certificate: **Free of charge**

Replacement certificate: **£40 (PDF), £85 (hard copy)**

[Apply](#)

- Once you have clicked on 'APPLY' you can then click on the button, 'Register Someone Else'.

Diploma in Pension Trusteeship Edit

Diploma in Pension Trusteeship

Price 178.00

When 11/4/2024 10:00 AM - 11:30 AM

Staff use only

Contact Mr James Cumine

Quals Diploma in Pension Trusteeship

[Register Myself](#)

[Register Someone Else](#)

Registration ends 10/21/2024 4:00 PM (GMT Daylight Time)
My registration status: Not registered

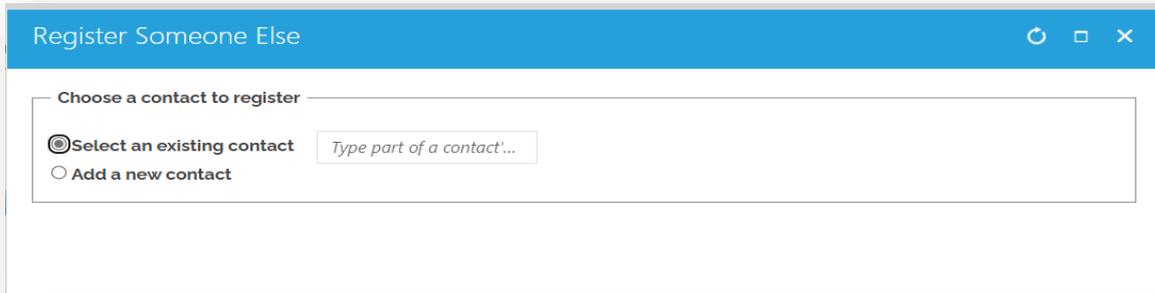
Program Add

Only display program items in registrant's itinerary

Monday, 04 November 2024 ▲

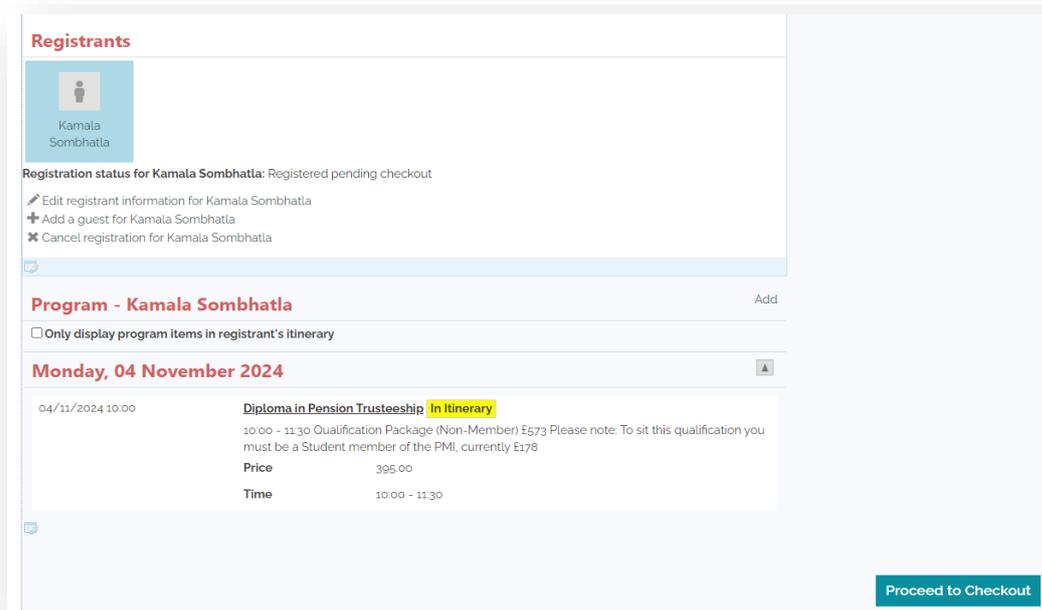
11/4/2024 10:00 AM	Diploma in Pension Trusteeship
	10:00 - 11:30 Qualification Package (Non-Member) £573 Please note: To sit this qualification you must be a Student member of the PMI, currently £178
Price	395.00
Time	10:00 AM - 11:30 AM

- 5) You will see the following window pop up which will enable you to access the record of the learner from the drop-down list:



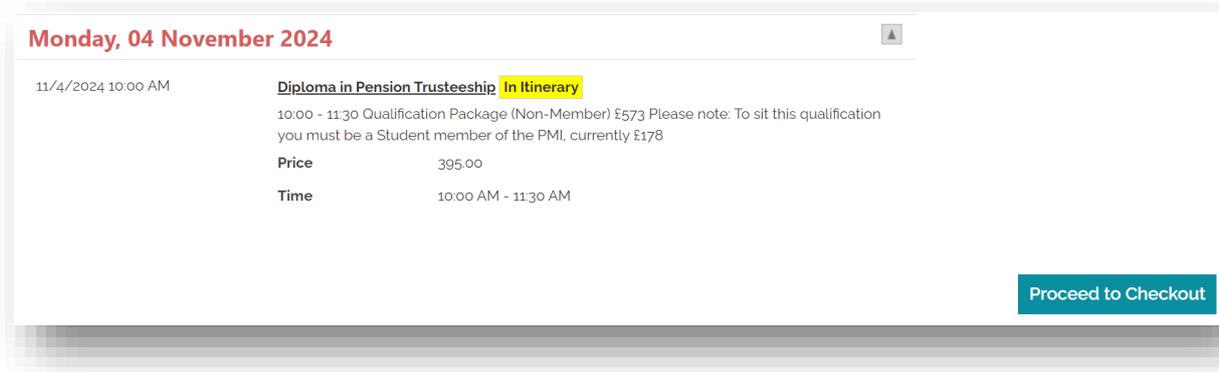
- **Please do not click on 'Add a new account'** - this would create a duplicate account within our database which will not be linked to any user.
- In case you are not able to find the name within the drop-down list, please inform PMI so that we can update the company details within the learner PMI profile.

- 6) Once you have selected the learner from the drop-down list, you will be able to see the following page which will reflect that learner has been added to the booking cart as one of the 'Registrants'

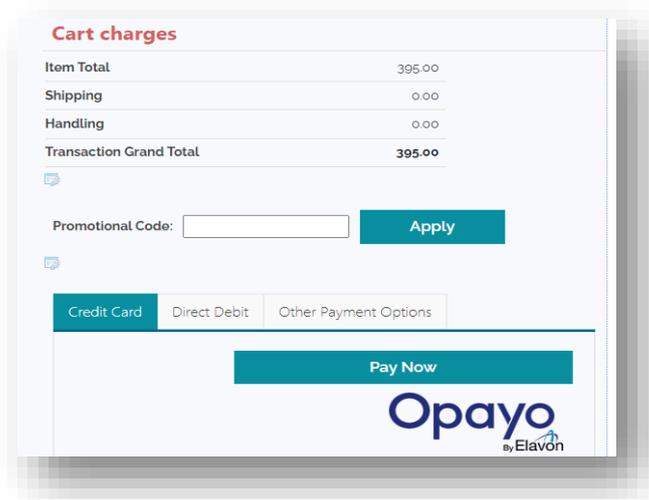


- 7) You can click on 'Proceed to Checkout' at this stage. **In case you want to add another learner from your organisation to this exam, please follow the steps explained in the point 3 and 4 above.**

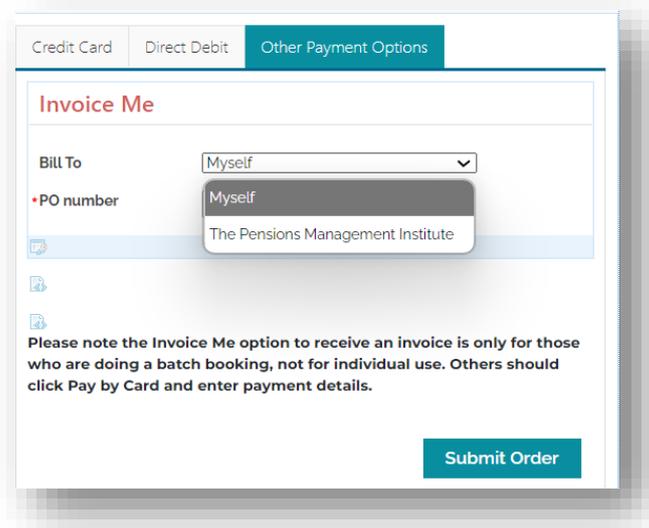
- 8) Once you see the exams and registrants have been added to your itinerary, you can proceed to checkout.



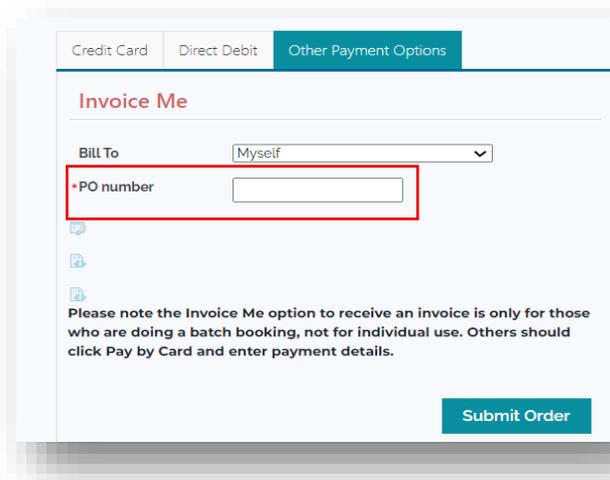
- 9) Once you are at the checkout, please ensure that the exam(s) and price is correct.
- 10) You will have the following payment option at the time of checkout:



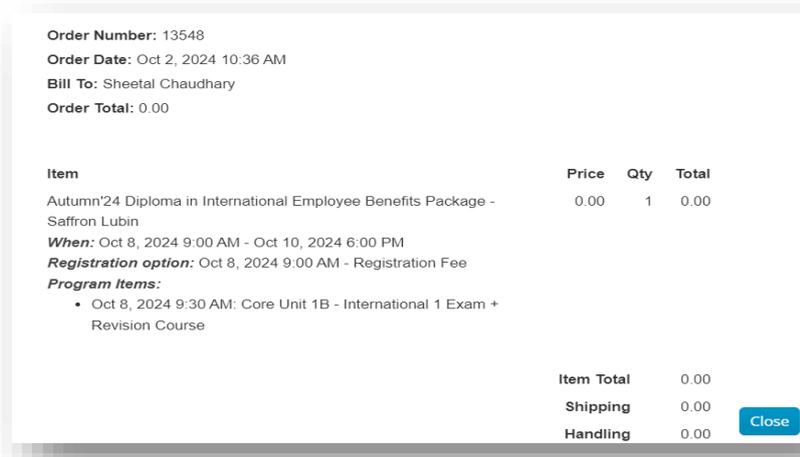
- 11) 10) Clicking in Credit/Debit card will take you the payment page to make the payment via card.
- 12) Clicking on 'Other Payment Options' would bring the following window:
- 13) You can raise the invoice to either your name or select the name of the organisation to which the invoice should be raised on to through the drop down list.



In case your organisation uses the purchase order (PO) number, please mention the PO number within the box provided or leave this as N/A in case this is not applicable to you. Please note , we cannot add the purchase order (PO) number once the invoice has been issued.

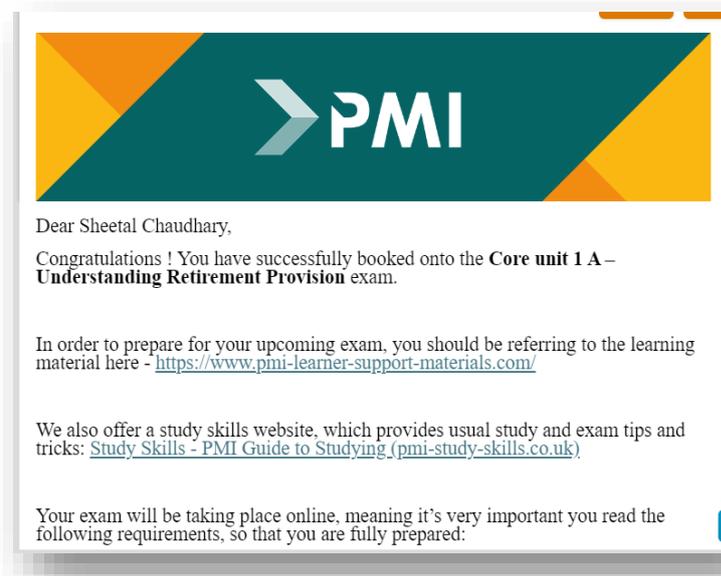


14) Once the above steps have been completed, please click on submit order. You, as company administrator, will see the booking confirmation on your screen as well as receive an automated confirmation, email . Example shown below:

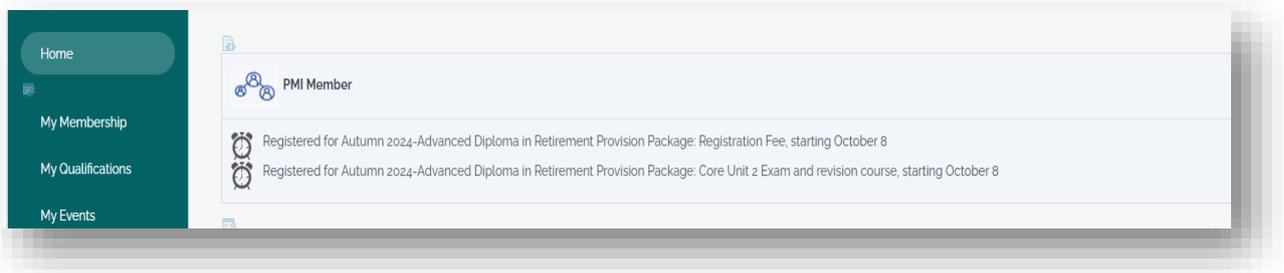


Item	Price	Qty	Total
Autumn'24 Diploma in International Employee Benefits Package - Saffron Lubin <i>When:</i> Oct 8, 2024 9:00 AM - Oct 10, 2024 6:00 PM <i>Registration option:</i> Oct 8, 2024 9:00 AM - Registration Fee <i>Program Items:</i> • Oct 8, 2024 9:30 AM: Core Unit 1B - International 1 Exam + Revision Course	0.00	1	0.00
Item Total			0.00
Shipping			0.00
Handling			0.00

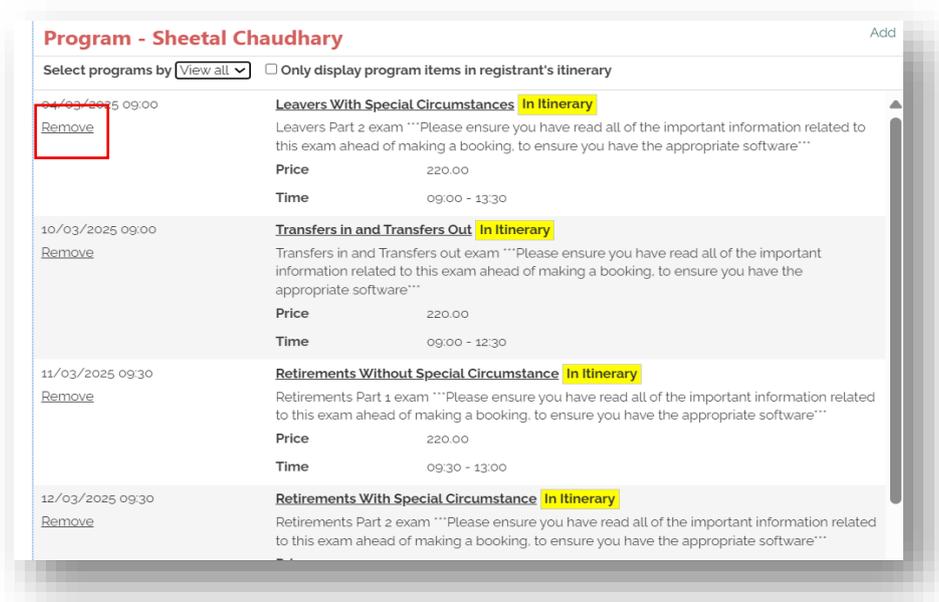
15) The learner that has been booked on to the exam will also receive an email regarding their exam booking on the email address updated on their PMI profile. See example below:



16) Learners will also be able to see the exam booking alert on their PMI profile >Home page:



17) In case you are booking an exam with multiple units, the system would allow you to choose (add/delete) units as per what unit/s you would like to add to your cart. This can be done via the 'remove' option on the booking page. Please refer to the example below for the Certificate in Pensions Calculation exam:



18) Please reach out to the qualification team (pmiqualifications@pensions-pmi.org.uk) if you face any issues while booking learners on to the exam or you have any questions.

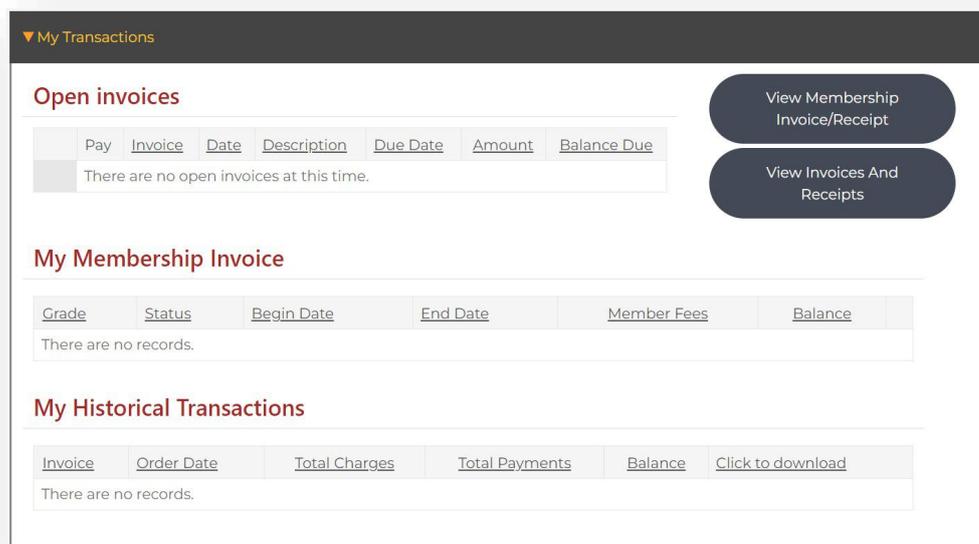
Re-sit Exam Bookings

If you would like to apply for a re-sit of an exam, you can only pay the re-sit price, if you have taken the same exam within a year. For example, if you originally took CU1A in April 2024 and wished to re-sit CU1A in April 2025, this would be permitted as a re-sit. If you originally took CU1A in October 2023 and wished to re-sit CU1A in April 2025, you would be required to pay for a full exam sitting.

Re-sit exam booking can only be processed by Qualifications team internally. To complete the booking, we will need the following details:

- Payer
- Billing address
- Purchase Order (PO) (if applicable)

For re-sit exam booking, please send an email to [PMI qualifications inbox](mailto:PMI_qualifications_inbox@pensions-pmi.org.uk) [pensions-pmi.org.uk](mailto:PMI_qualifications_inbox@pensions-pmi.org.uk), as all re-sit exam bookings are managed internally.



▼ My Transactions

Open invoices

Pay	Invoice	Date	Description	Due Date	Amount	Balance Due
There are no open invoices at this time.						

View Membership Invoice/Receipt

View Invoices And Receipts

My Membership Invoice

Grade	Status	Begin Date	End Date	Member Fees	Balance
There are no records.					

My Historical Transactions

Invoice	Order Date	Total Charges	Total Payments	Balance	Click to download
There are no records.					

Finding Invoices/Transactions

Invoices for any PMI transaction are usually available on the PMI account that has been used for placing the order after 72 hours of the transaction. To view invoices, click on the 'My Finance' tab and scroll down to the section that says 'Open Invoices.' This will show all invoices you currently have outstanding.

Please note, we do not send invoices via email and this needs to be retrieved via your [PMI account](#).

Open invoices

	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

Add To Cart

Should you wish to pay 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.

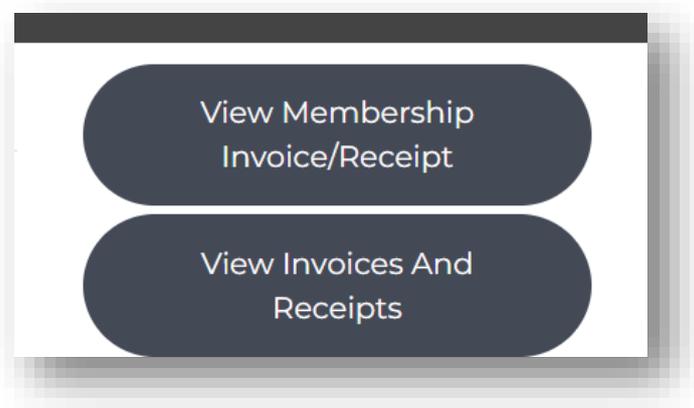
Open invoices

	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

PDF Invoices

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



- 2) You will then need to click on the PDF icon to download the invoice(s).

