



PMI Exam Guide

The Pensions Management Institute (PMI)

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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	• email: support@testreach.com/customersupport@testreach.com • call +44 (0)2034758685
PMI	• 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. If taking your exam at home, this must be taken at a suitable desk or table and **not** on your bed or sofa, as this is not classified as a 'suitable environment'.

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 two 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 as per their career aspirations. We would advise looking in depth at qualification specification/syllabuses available on each qualification

page. We would also recommend learners to look at the [Competency Framework](#) document to see which qualification might be most suitable.

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.

If you encounter any technical issues the TestReach support team, 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. **Please note that we no longer accept English being a second language as a claim for 25% additional time.**

Where can I find my study material?

Learning material for the three qualifications below can be found on the respective webpages under the 'Useful Resources' tab:

[Advanced Diploma in Retirement Provision \(ADRP\)](#)
[Certificate in Pensions Calculations \(CPC\)](#)
[Retirement Provision Certificate \(RPC\)](#)

There is no set study material for any of the Trustee exams (Award in Pension Trusteeship (APT), Certificate in Pension Trusteeship (CPT), Diploma in Pension Trusteeship (DPT)). However, it is recommended for learners to ensure they go through the [Trustee Toolkit](#) on The Pensions Regulator website. There is also suggested, further reading for APT/CPT within the [APT & CPT Unit Guidance](#) document and for DPT within the [DPT Guidance Document](#). All three webpages have sample Q&As within the 'Useful Resources' sections as well.

Exam preparation and guidance:

The PMI's [Exam Preparation & Guidance Hub](#) offers short, practical videos to support candidates at every stage of their qualification journey, including understanding qualification routes, booking exams, using the TestReach platform, completing technical checks, accessing study and practice materials, preparing for remote invigilation, and receiving results, feedback reports and certificates.

The videos provide clear, accessible guidance to help candidates feel more confident about the exam process, avoid common technical issues, access the study and support resources available to them, understand exam requirements and expectations, and prepare more effectively for success.

Where/when will I receive my certificate?

Your unit and/or final certificate will be available as a PDF to view and download via your PMI profile after your results have been emailed to you. You will receive a specific email letting you know when you can view your certificate. In order to view it you will need to log into your PMI account and click on the following; My PMI > My Qualifications > Qualification Details. You will then be able to click on the 'Download' button within the 'Units Completed' or 'Qualifications Completed' column(s).

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-](https://www.testreach.com/candidate-support.html)

[support.html](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 Registration: 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

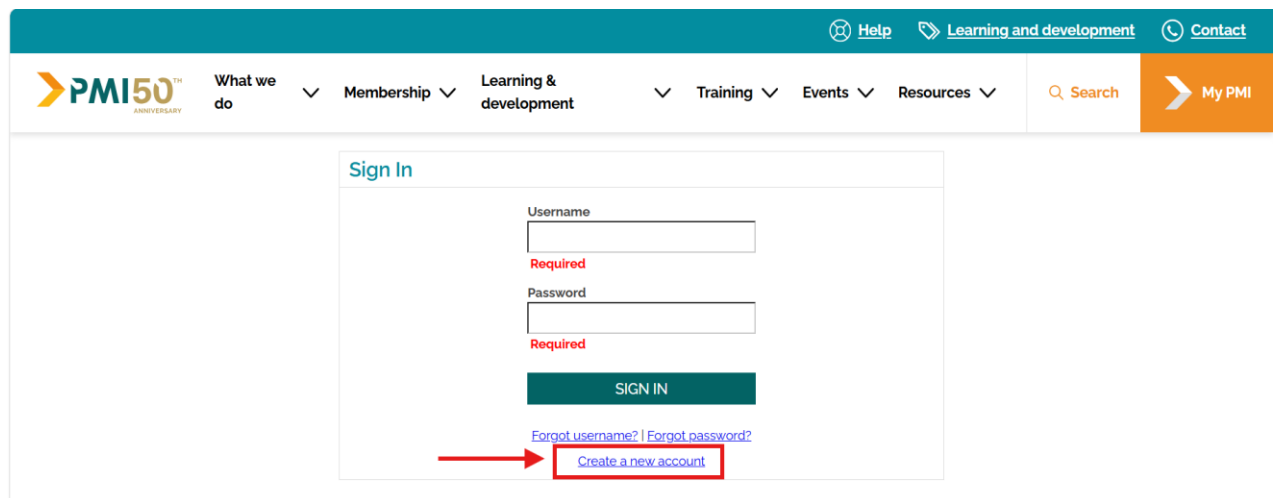
New members

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 "Login" in the top right corner or follow this [link](#).



1. Click on "Create a new account"



- 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	Enter an organization
*Email	
Phone	
Mobile phone	
*Country	United Kingdom ▼
Postal code lookup	Search
*Address	
*City	
*County / region	
*Postal code	
Username	
*Password	
*Confirm password	

The password must be at least 18 characters long and contain both letters and numbers.

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. You can also use your email address as your username.

- 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
Admin Dashboard

Hi Saffron,
[Review Your Details Here](#) Please take a moment to check and verify your membership information to ensure it's accurate and up to date.
Welcome
Saffron Lubin
My PMI Services

Existing members

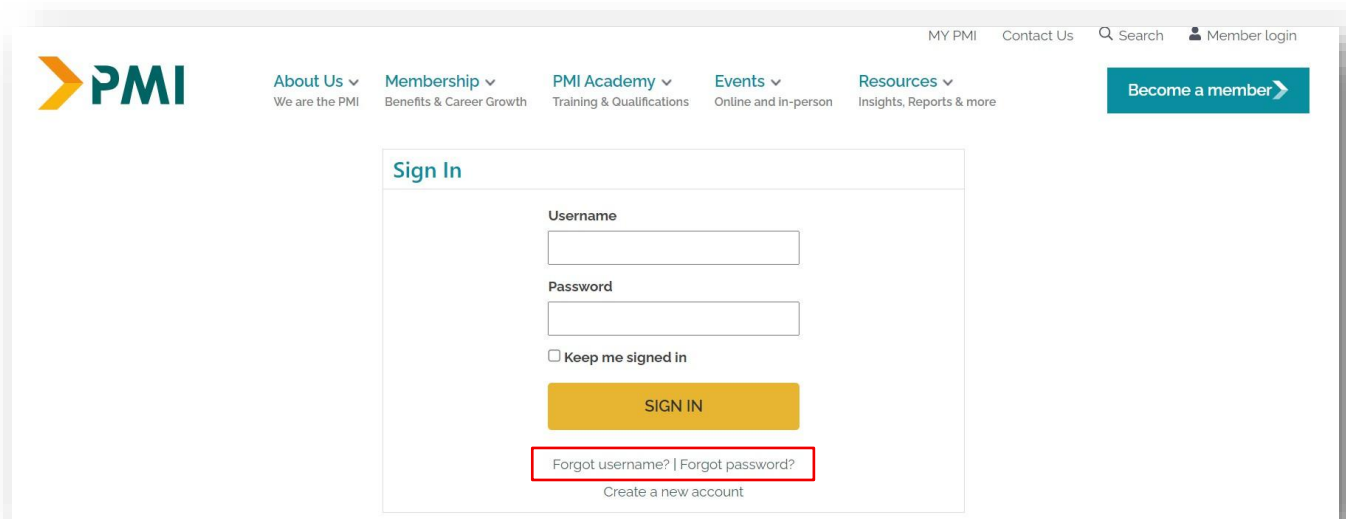
If you have **previously** completed an exam, qualification or attended an event with the PMI, it is likely that you already have an account with us. Please follow the steps outlined below, as attempting to create a new account will result in a duplicate account being created which is not ideal and could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

1. Go to the PMI website and click on the "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.



MY PMI Contact Us Search Member login

About Us We are the PMI Membership Benefits & Career Growth PMI Academy Training & Qualifications Events Online and in-person Resources Insights, Reports & more

Become a member

Sign In

Username

Password

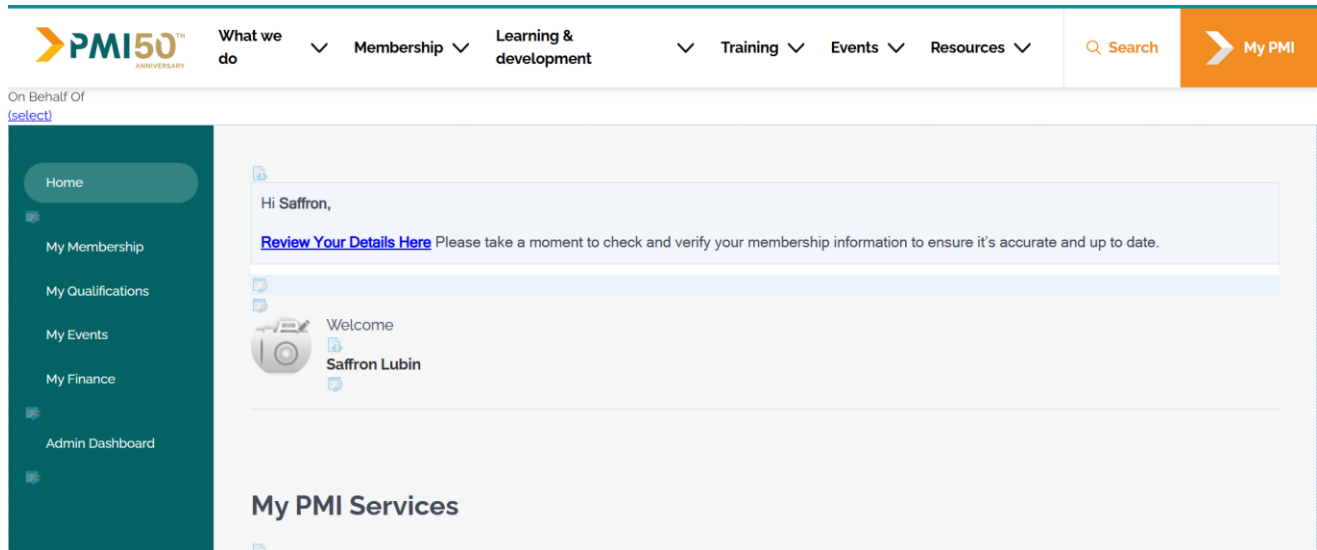
☐ Keep me signed in

SIGN IN

[Forgot username? | Forgot password?](#)

[Create a new account](#)

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

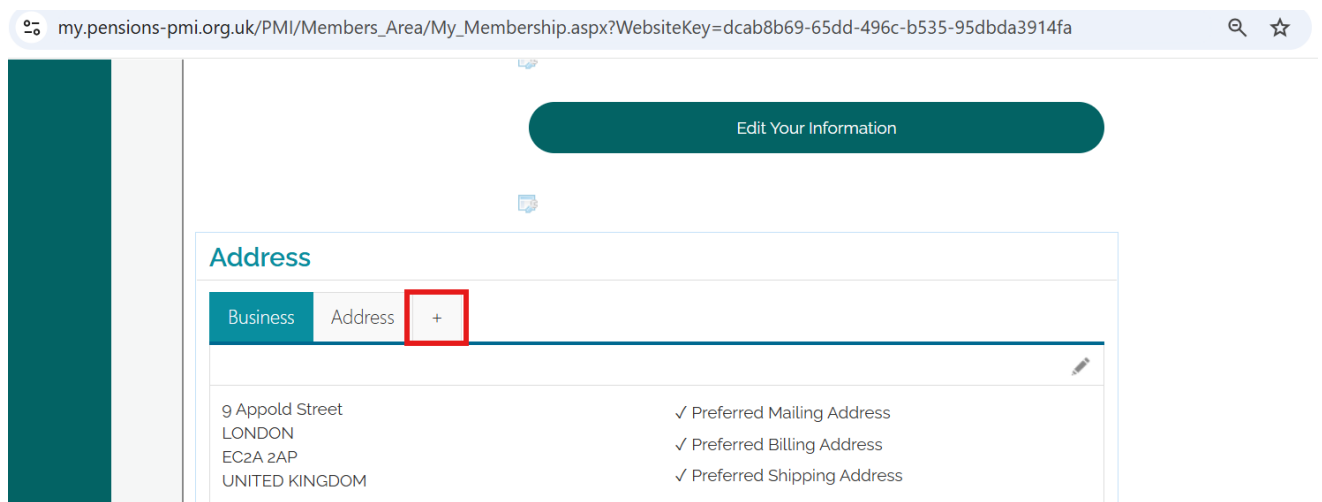


Viewing/ Editing your details

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/ AddingAddresses

- To add additional addresses, expand the Membership tab, then go to information and scroll down to the bottom of your information to address where you can add or edit your address



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.

New Address

Address

Purpose

Home

▼

Country

United Kingdom

▼

Postal code lookup

Search

Address

City

County / region

Postal code

Phone

☐ Preferred Mailing Address
☐ Preferred Shipping Address
☐ Preferred Billing Address

Notes

Save & Close

Cancel

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

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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

On Behalf Of
(select)

 Home
 My Membership
 My Qualifications

Information

Saffron Lubin

[Pensions Management Institute](#)

Security

Edit

Prefix

Miss

First name

Saffron

Middle

Last name

Lubin

Suffix

Designation

Title

Exam Coordinator

Informal name

Saffron

Full name

Saffron Lubin

Primary organization

Pensions Management Institute

Mobile phone

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.

[Erase This Contact](#)

Save & Close

Save

Cancel

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

After your account has been set up, you can register for PMI examinations.

Sign in to your PMI account and follow the steps below.

To book an examination, go to the relevant qualification webpage on the PMI website.

[Diploma in Pension Trusteeship](#) – The Pensions Management Institute

- 1) When bookings for public PMI examinations open, scroll down the relevant webpage and select the 'Book Your Units' tab, usually displayed on the right-hand side. See the example below:

Diploma in Pension Trusteeship (DPT)

The Diploma in Pension Trusteeship (DPT) is a standalone award, designed to show judgement when dealing with complex pensions issues, above and beyond technical knowledge.

The aim of this qualification is to increase professionalism further and highlight the distinction between Lay/Member nominated trustees and Professional trustees qualified at the same level. The Diploma is the PMI's first qualification to integrate ESG into its course material, making it a markedly more advanced qualification

[Helpful Resources](#)
[Important Information](#)
[PMI Pathways](#)
[Book your exam](#)



Cost

Please note: To sit this qualification, you must be at least a Student member of the PMI.

To sit this qualification, you must be a PMI Student member. If applicable, a **£195** student membership fee will be automatically added at checkout when you register for the exam, **no separate membership application is required.**

Description	Cost
Qualification Package (Non-Student Member)	£590
Qualification Package (Current Student Member)	£395
Final certificate	Free of charge
Physical certificate:	£85
Final Fee	£590
Annual student membership fee	£195

- 2) Select 'Book here', as shown below, to open the Main Exam event page.

Book your exam

Ready to take the next step in your qualification journey?

Exam date: 7 October 2026

Registration deadline: 12 August 2026

[Book here](#)

- 3) Before registering, read the important examination information on the relevant qualification webpage. The example below relates to the Diploma in Pension Trusteeship qualification:

Diploma in Pension Trusteeship

[Edit](#)

Diploma in Pension Trusteeship 7 October 2026 exam booking information

The Diploma in Pension Trusteeship 7 October 2026 exam will be hosted via our online platform provider, Testreach. Please read the following information before making an exam booking:

- 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](#)
- Ensure you have read our [policy](#) here before making any bookings
- Ensure you have read through the Testreach exam invigilation protocol [here](#)

The exam registration guide can be found [here](#)

- 4) Select 'Register Myself'.

Price 287.00

When 07/10/2026 10:30 - 12:00

Staff use only

Contact [Mr James Cumine](#)

Quals Diploma in Pension Trusteeship

Register Myself

Register Someone Else

Registration is closed.

My registration status: Not registered

Program

☐ Only display program items in registrant's itinerary

Wednesday, 07 October 2026

07/10/2026 10:30	Diploma in Pension Trusteeship 10:00 - 11:30 Qualification Package (Non-Member) £682 Please note: To sit this qualification you must be a Student member of the PMI, currently £287 Price 395.00 Time 10:30 - 12:00
------------------	--

- 5) When the examination is displayed in your itinerary, proceed to check out.

Wednesday, 07 October 2026

07/10/2026 10:30

Diploma in Pension Trusteeship In Itinerary
10:00 - 11:30 Qualification Package (Non-Member) £682 Please note: To sit this qualification you must be a Student member of the PMI, currently £287
Price 395.00
Time 10:30 - 12:00

Proceed to Checkout

- 6) At checkout, confirm that the examination and price are correct.

Shopping cart

☐ Override transaction date

Items

Item	Quantity	Price	Total	
Diploma in Pension Trusteeship	1	682.00	682.00	Remove

Update

- 7) As shown in the screenshot above, the student membership fee is added to your basket automatically.
- 8) After confirming the total, you may pay immediately by card. Select the credit/Debit card payment option, then select 'Pay Now'.

Cart charges

Item Total	682.00
Shipping	0.00
Handling	0.00
Transaction Grand Total	682.00

Promotional Code: Apply

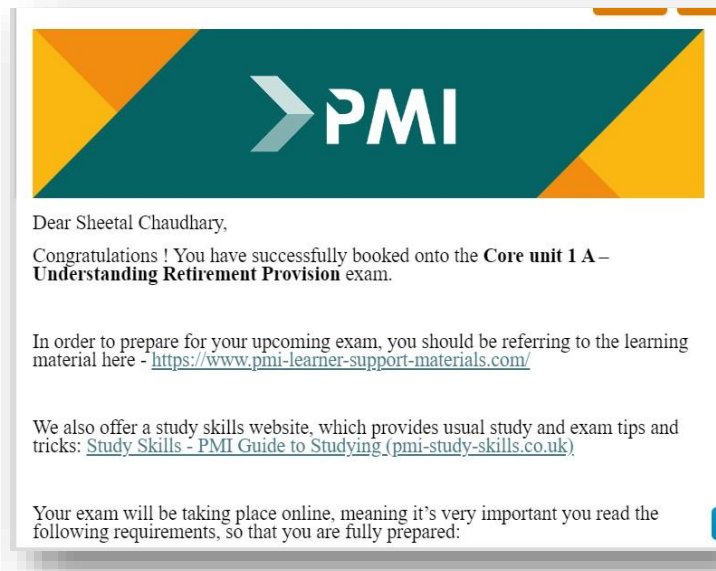
Credit Card
Direct Debit
Other Payment Options

Pay Now

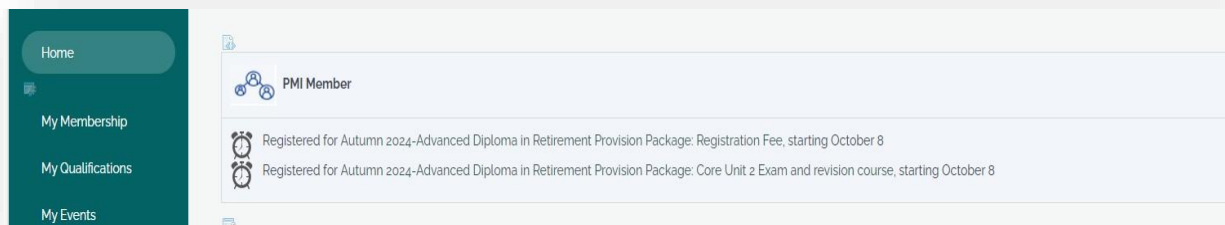


- 9) You will receive an email to your registered email address confirming your examination booking.

See example below:



- 10) You will also be able to see the exam booking alert on your PMI profile >Home page:



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

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 [Certificate in Pensions Calculations \(CPC\)](#) exam. You would visit the respective qualification webpage through the [PMI website](#).
- 2) When bookings open for the public PMI exams, you will be able to scroll down the respective webpage and locate the '**Book Your Units**' tab, which will typically be located on the right hand side of the webpage .Please see the example below:

Certificate in Pensions Calculations

The Certificate in Pensions Calculations (CPC) is a qualification aimed at pensions administrators that demonstrates their ability to carry out manual benefit calculations for occupational pension schemes.



Book your units



Bookings for exam units

Ready to take the next step in your qualification journey? PMI exam units are available throughout the year.

- 3) You will be able to see the important information the learners need to know about the exam on the bookings webpage.
- 4) Once you have clicked on 'APPLY' you can then click on the button, 'Register Someone Else'.

On Behalf Of
[\(select\)](#)

CPC Exams - November 2026 [Edit](#)

CPC Exams - Death Part 1 and 2 and Transfer

The exams within this Certificate in Pensions Calculations -November 2026 will be hosted via our online platform provider, Testreach. Please read the following information before making an exam booking:

- 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](#)
- Ensure you have read our [policy](#) here before making any bookings
- Ensure you have read through the Testreach exam invigilation protocol [here](#)

The exam registration guide can be found [here](#)

Price 195.00

When 02/11/2026 09:00 - 04/11/2026 12:00

Where UNITED KINGDOM

Register Myself

Register Someone Else

- 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:

Register Someone Else

Choose a contact to register

☒ Select an existing contact

Type part of a contact'...'

☐ Add a new contact

- **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. The learner can also update the company detail on their profile as well.**

- 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'. To add additional learners please follow the steps explained in the point 3 and 4 above.

Registration status for Kamala Sombhatla: Registered pending checkout

[Edit registrant information for Kamala Sombhatla](#)
[Add a guest for Kamala Sombhatla](#)
[Cancel registration for Kamala Sombhatla](#)

Program - Kamala Sombhatla [Add](#)

Select programs by

Day ▼

☐ Only display program items in registrant's itinerary

Monday, 02 November 2026 ▲

14:00 [Add](#)

Transfers in and Transfers Out
 Transfers exam ""Please ensure you have read all of the important information related to this exam ahead of making a booking, to ensure you have the appropriate software""

Price 220.00
 Time 14:00 - 15:30

Tuesday, 03 November 2026 ▼

Wednesday, 04 November 2026 ▼

- 7) You can add the exam units using 'Add' option and proceed to checkout.

Registration status for Kamala Sombhatla: Registered pending checkout

[Edit registrant information for Kamala Sombhatla](#)
[Add a guest for Kamala Sombhatla](#)
[Cancel registration for Kamala Sombhatla](#)

Program - Kamala Sombhatla [Add](#)

Select programs by

Day ▼

☐ Only display program items in registrant's itinerary

Monday, 02 November 2026 ▲

14:00 [Add](#)

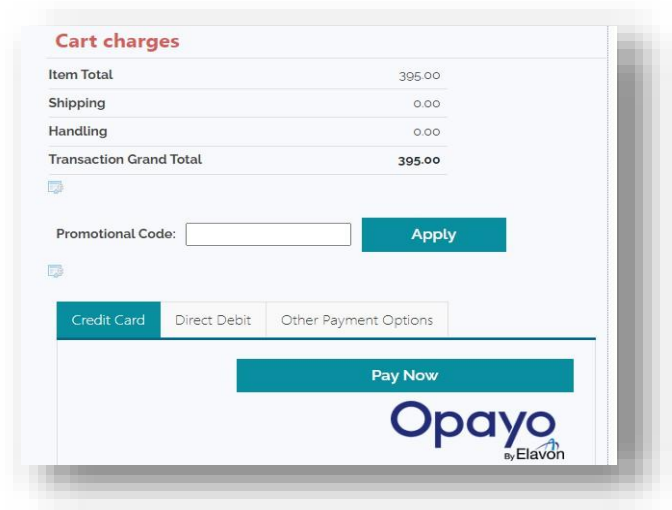
Transfers in and Transfers Out
 Transfers exam ""Please ensure you have read all of the important information related to this exam ahead of making a booking, to ensure you have the appropriate software""

Price 220.00
 Time 14:00 - 15:30

Tuesday, 03 November 2026 ▼

Wednesday, 04 November 2026 ▼

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



Cart charges

Item Total	395.00
Shipping	0.00
Handling	0.00
Transaction Grand Total	395.00

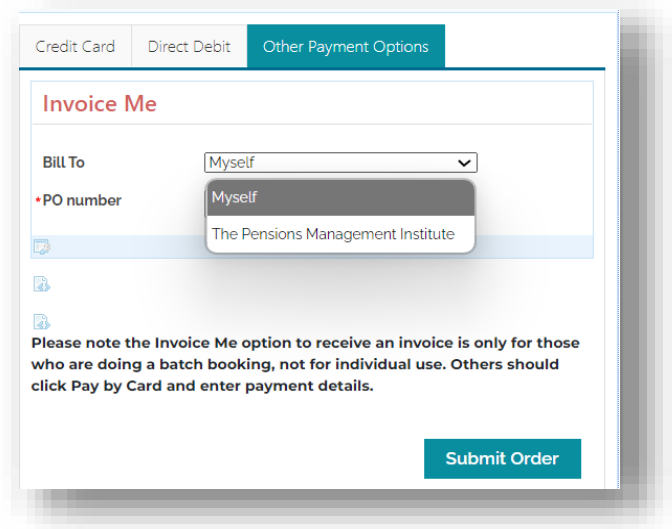
Promotional Code: **Apply**

Credit Card | Direct Debit | Other Payment Options

Pay Now

Opayo
By Elavon

- 10) Clicking in Credit/Debit card will take you the payment page to make the payment via card.
- 11) Clicking on 'Other Payment Options' would bring the following window:
- 12) 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.



Invoice Me

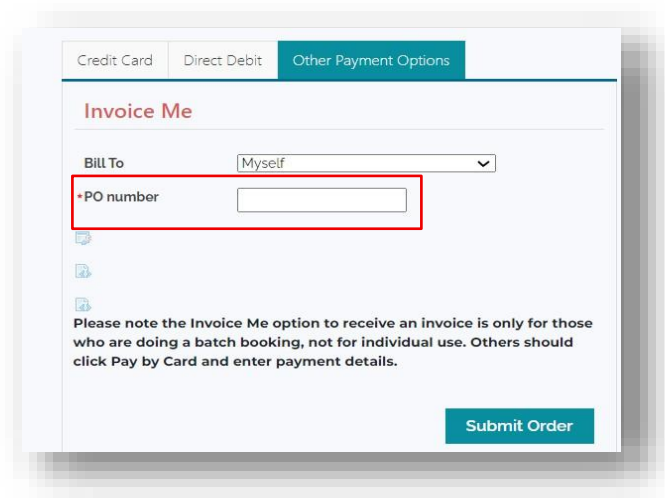
Bill To:

PO number:

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.

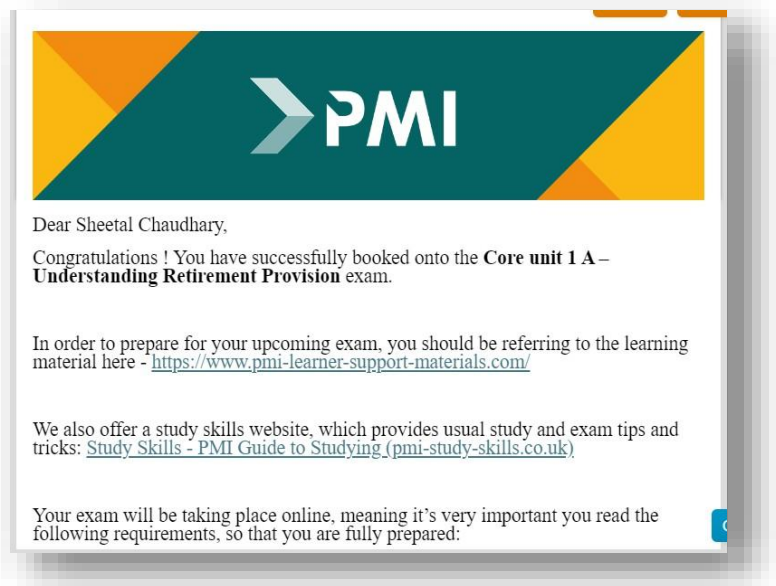
Submit Order

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.

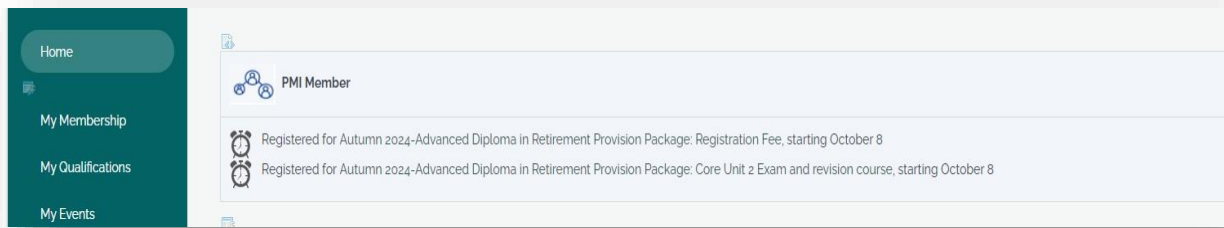


13) Once the above steps have been completed, please click on submit order. You, as company administrator, will see the booking confirmation on your screen as well as receive an automated confirmation, email. Example shown below:

14) 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:



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



- 16) 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.

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](#).

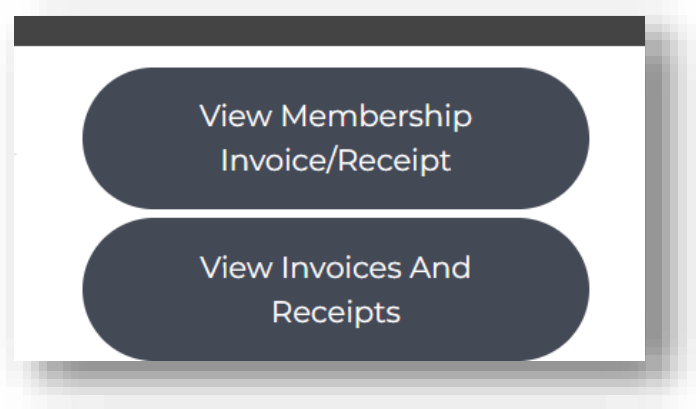
Open invoices							
	Pay	Invoice	Date	Description	Due Date	Amount	Balance Due
▶	☐					85.00	85.00
▶	☐					85.00	85.00
Total Balance Due							170.00
Total Selected							0.00
Add To Cart							

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.

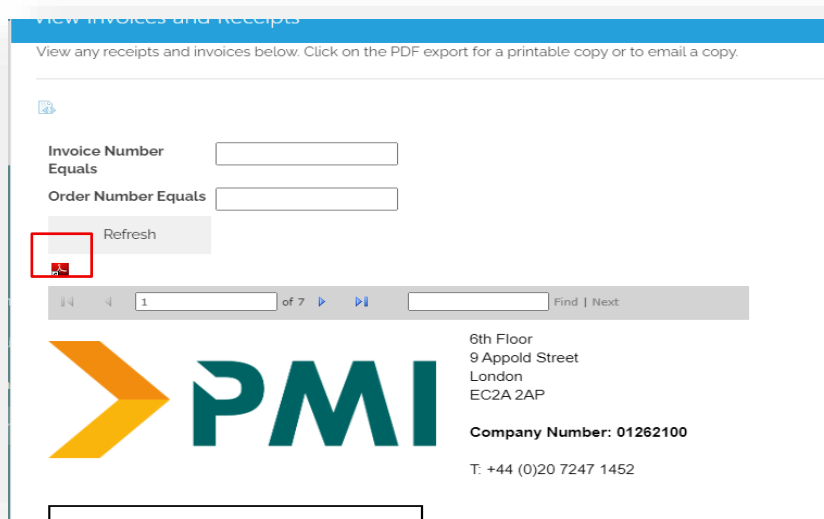
Open invoices							
	Pay	Invoice	Date	Description	Due Date	Amount	Balance Due
	☒					85.00	85.00
	☐					85.00	85.00
Total Balance Due							170.00
Total Selected							85.00
Add To Cart							

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).



Finding Qualification/Units completed

You can view your qualification and unit completion history through your PMI member account.

To check which qualifications or units you have completed:

- A. Log in to your [PMI account](#).
- B. Go to your My PMI.
- C. Navigate to My Qualifications section.
- D. Review your qualification record to see the units/qualification you have successfully completed.
- E. Your completed units and qualifications will be shown here:

Status for Enrolled Qualifications

Certification Program Name	Completed Units
There are no records.	

Units Completed

Units Name	Completion Date	Certificate
There are no records.		

If you find that a qualification or unit you have successfully completed is missing from your record, please contact the PMI Qualifications Team - pmiqualifications@pensions-pmi.org.uk so that your records can be checked.

Please note: Registration for an exam does not mean that a unit has been completed. A unit will only be shown as completed once the relevant examination result has been processed and recorded on your learner account.

Finding Exam Certificates

Once you have successfully completed an exam, your exam certificate will be available through your PMI member account.

To access your exam certificate:

1. Log in to your PMI account.
2. Go to My PMI.
3. Navigate to My Qualifications section – Qualification details.
4. Your certificate will be available to view and/or download where applicable against the units and qualifications completed.

If you have successfully completed an exam but cannot find your certificate, please contact the **PMI Qualifications Team** - pmiqualifications@pensions-pmi.org.uk for assistance.