VQ REGISTRATIONS

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

PMI Qualifications Team

Contents

VQ Registrations: The essentials

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

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

1. Ensure that they have an existing PMI account. If they do not or are completely new to the PMI, an account will need to be created first. ([please click here for instructions](#)).

2. Please contact the PMI qualifications team on pmiqualifications@pensions-pmi.org.uk and provide the following details so that we can register the learners:
   Title of Qualification(s):
   Name of Registrant:
   PMI number (if known):
   Name of Booker (if booking on behalf of learner):
   Total cost:
   PO Number (if required):

   Please note, if you wish the invoice to show the company's details, you will need to appoint a contact that can be used to register on behalf of candidates. They will also need to have a PMI account if they don't already have so.
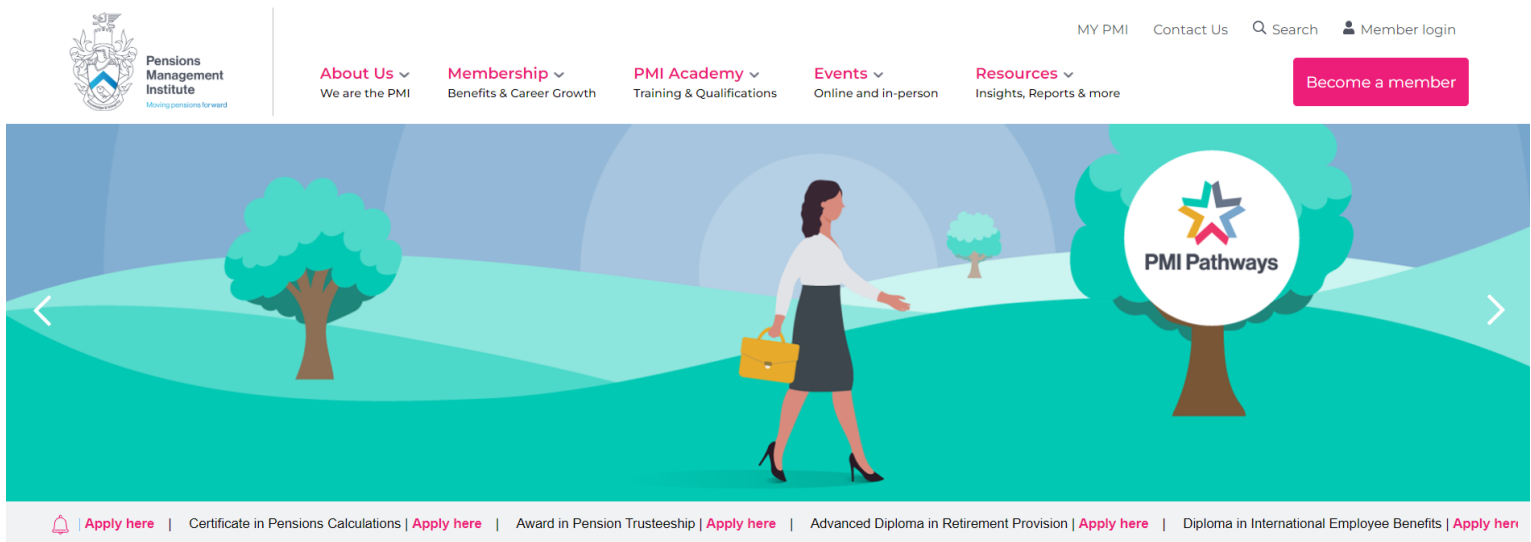
Once the steps above have been followed, we will register your learner(s) and an email containing the order confirmation will be sent.

1. Your PMI Account

1.1 New members

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

1. Go to the PMI website and click on the "Member login tab" in the top right corner or follow this link

2. Click on "create a new account"

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

Create an Account

Prefix	(None) ⌄
*First name	
Middle name	
*Last name	
Suffix	(None) ⌄
Organization	Th
*Email	
Phone	
Mobile phone	
*Country	United Kingdom ⌄

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

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

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

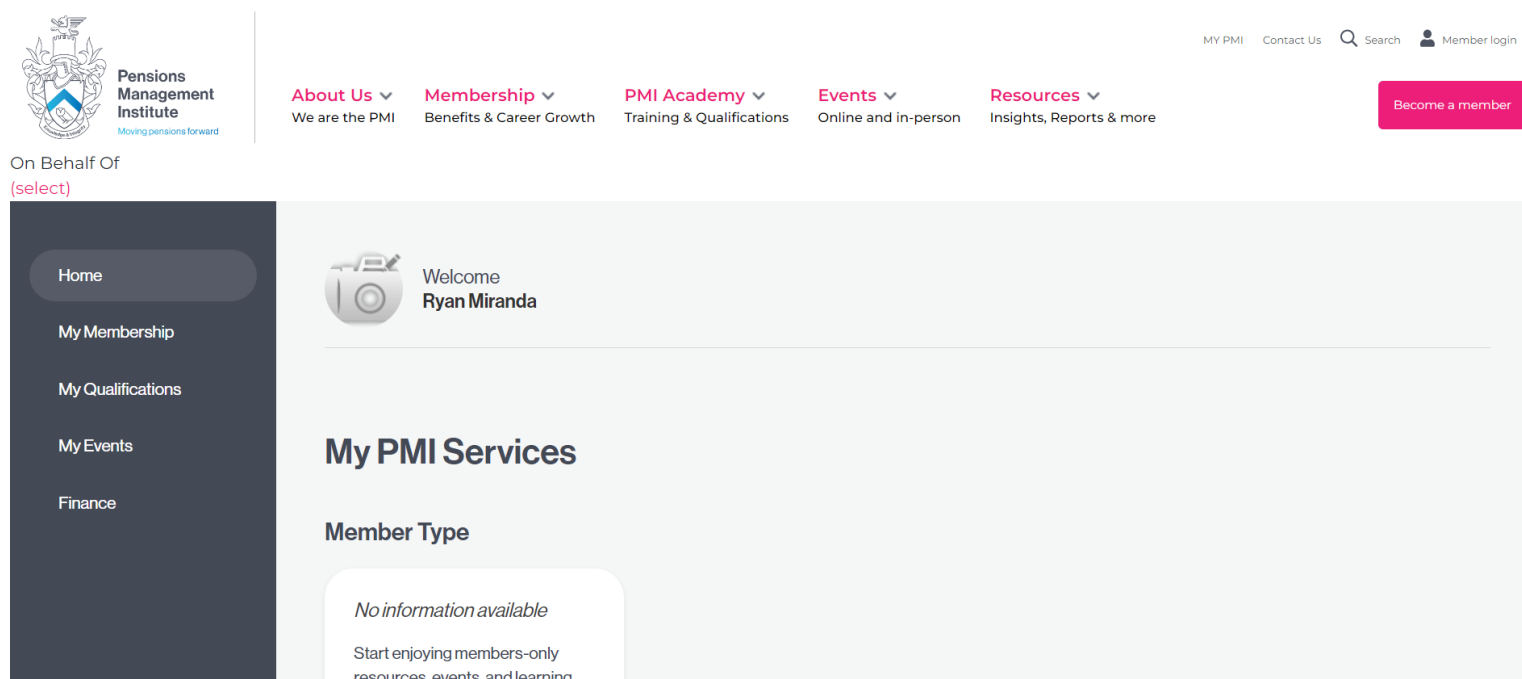|		
Postal code lookup		SEARCH
*Address		
*City		
*County / region		
*Postal code		
Username		
*Password		
*Confirm password		

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

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

Save Cancel

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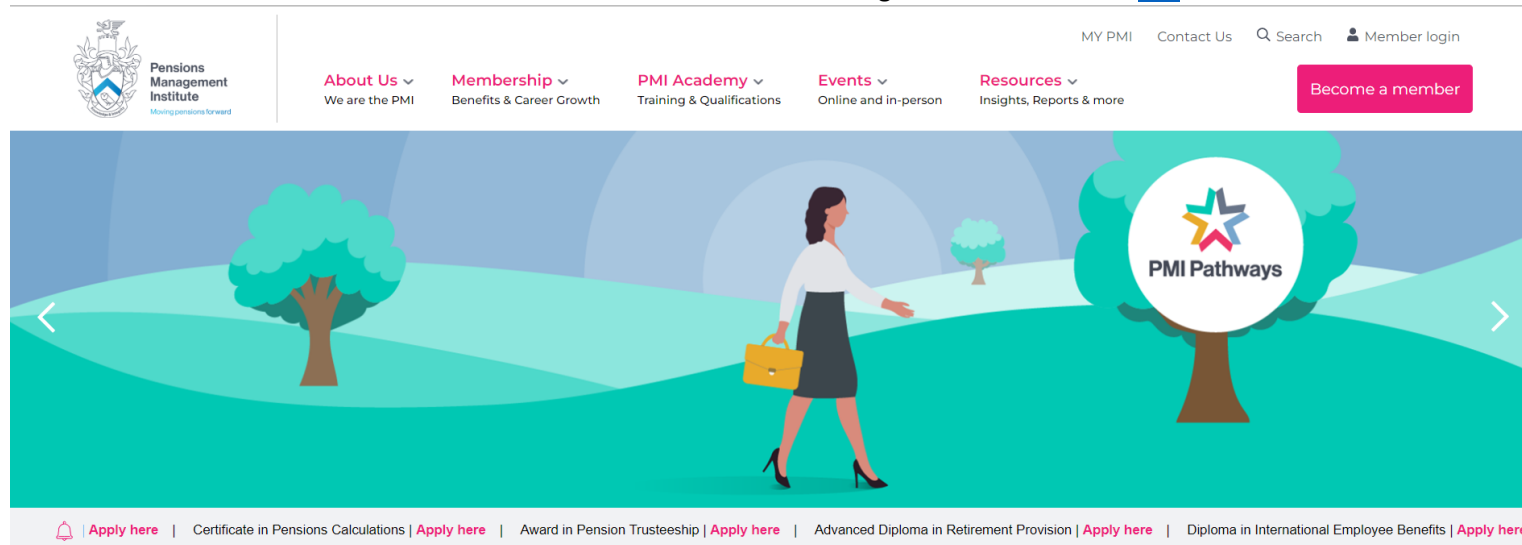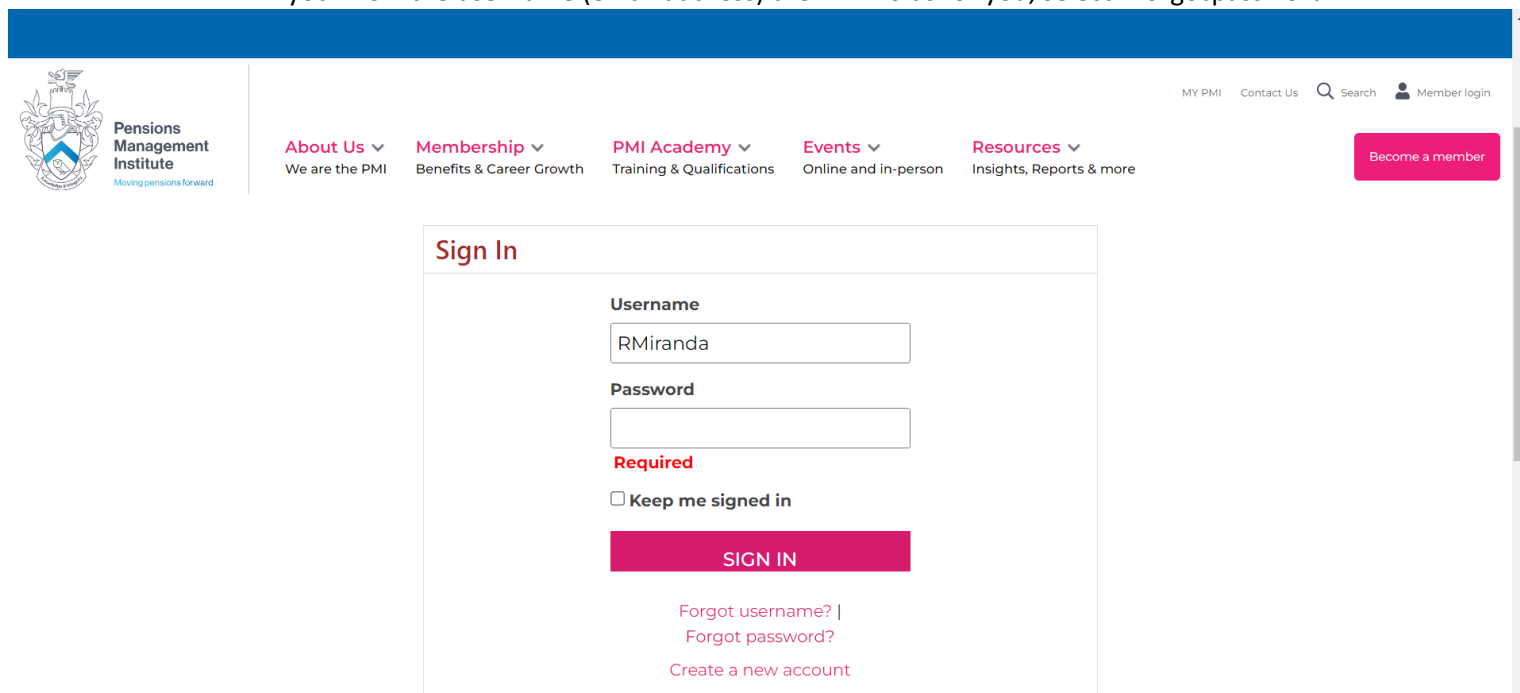

1.2 Existing members

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

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) the PMI holds for you, select "Forgot password"
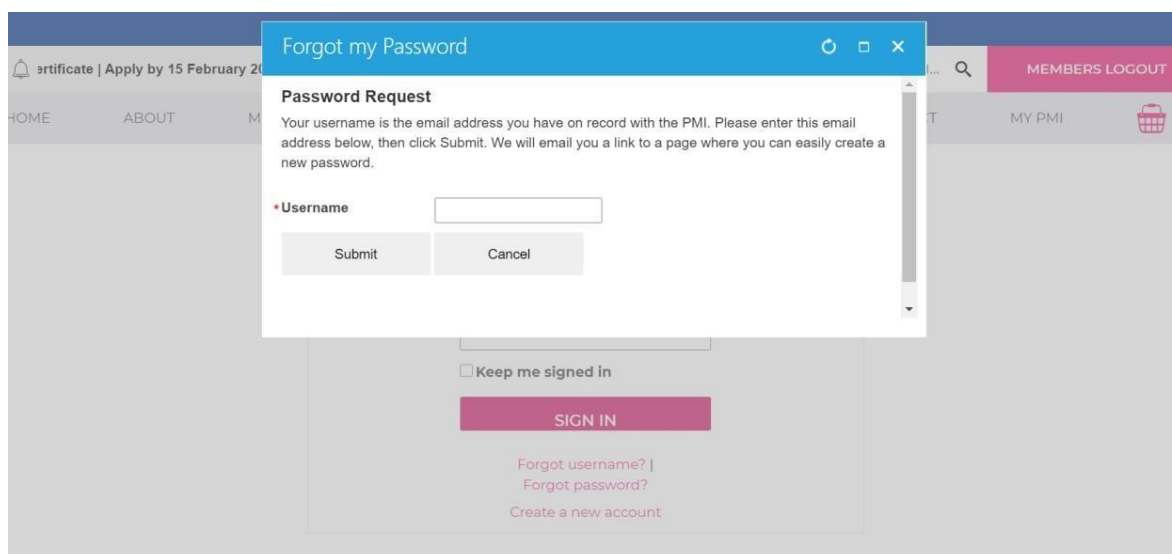
3. Enter your email address and click "submit." A password reset link will emailed to your email address. **PLEASE** be sure to check your junk/ spam folders too as sometimes the link can be sent there.

Please follow the instructions detailed in the email received.

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

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

1.3 Viewing/ Editing your details

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

1.3.1 Updating/ Adding Addresses

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

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

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

1.3.2 Name and Employer Changes

1.3.2.1 To update your name or organisation you need to select the pencil icon located to the top left-hand side of the screen.
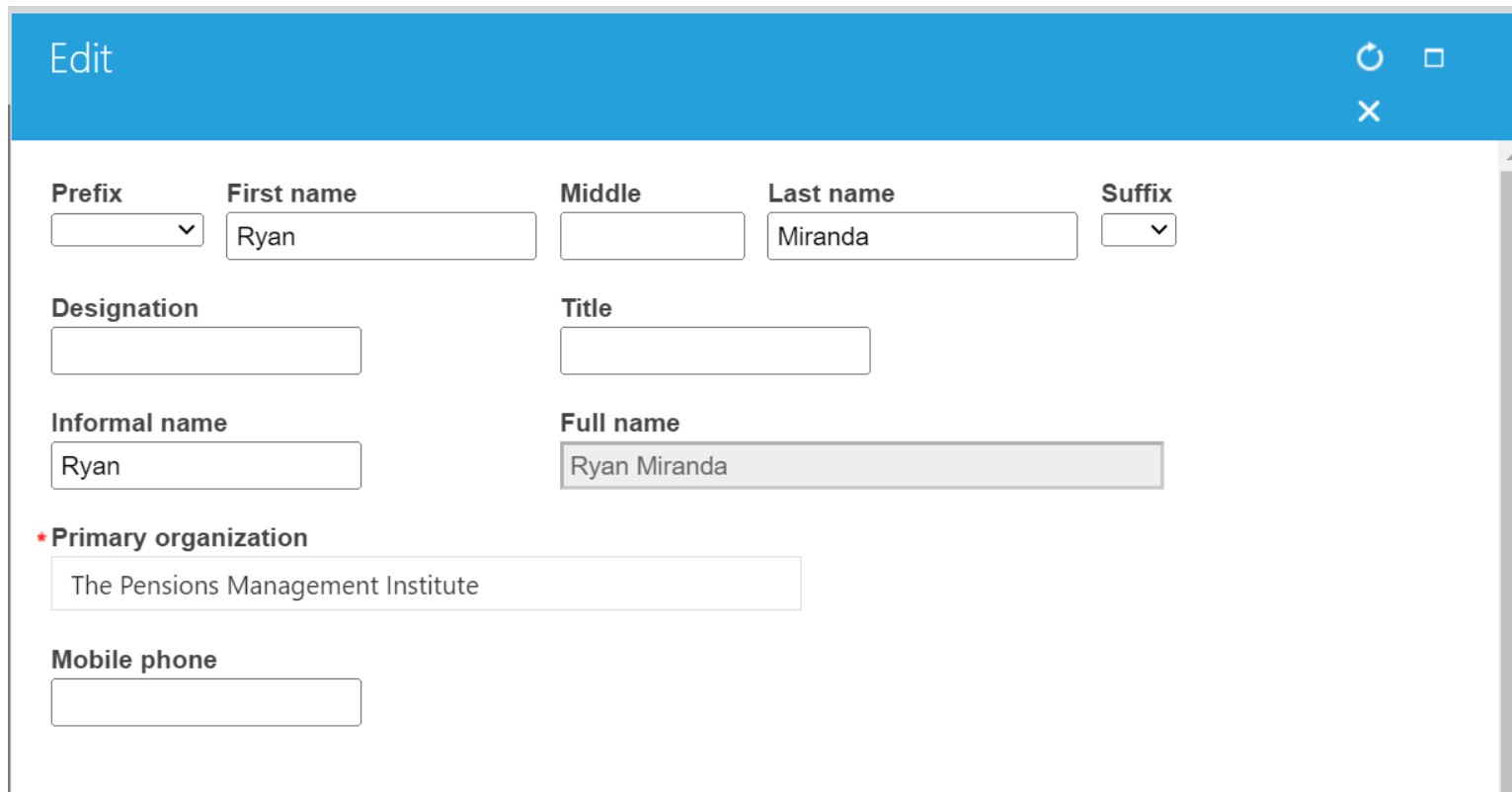
1.3.2.2 You will then be able to update the necessary information and then click 'Save & Close' to register your changes.

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

1.4 Finding Invoices/ Transactions

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

▼ 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.					

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

Open invoices

	Pay	Invoice	Date	Description		Due Date	Amount	Balance Due
▶	☑						85.00	85.00
▶	☐						85.00	85.00

Total Balance Due	170.00
Total Selected	**85.00**

Add To Cart

1.4.1 PDF Invoices

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

View Membership
Invoice/Receipt

View Invoices And
Receipts

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

View Invoices and Receipts

**Invoice Number
Equals**

Order Number Equals

Refresh

| ◀◀ | ◀ | 1 | of 1 | ▷ | ▷◀ | | Find | Next |

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2. VQ Registrations

2.1 IMPORTANT PLEASE READ FIRST

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

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

APE, CPE, CPA, and DPA qualifications.

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

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

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

- Award in Pensions Essentials (APE)
- Certificate in Pensions Essentials (CPE)
- Certificate in Pensions Administration (CPA)
- Diploma in Pensions Administration (DPA)

2.2 Registering for the APE, CPE, CPA, DPA

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

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

3. Competency Framework

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

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

PMI Qualification Levels

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