



VQ REGISTRATIONS

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

PMI Qualifications Team

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VQ Registrations: The essentials

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

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

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

Title of Qualification(s):

Name of Registrant:

PMI number (if known):

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

Total cost:

PO Number (if required):

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

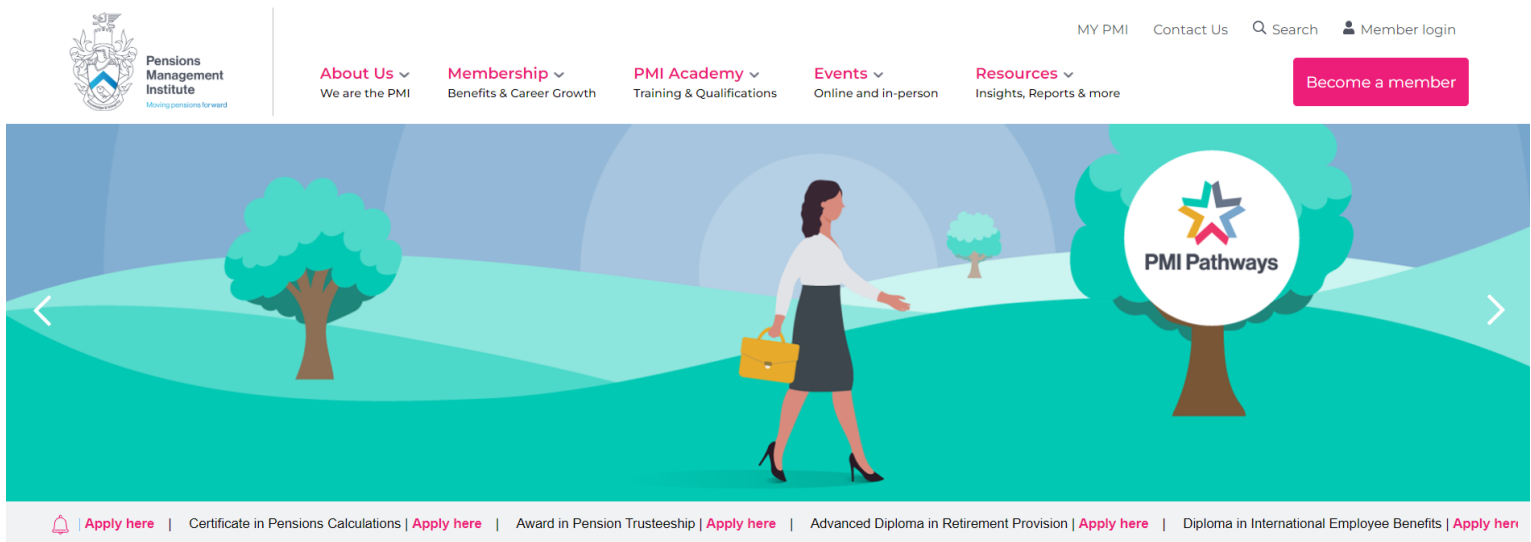
Once the steps above have been followed, we will register your learner(s) and an email containing the order confirmation will be sent.

1. Your PMI Account

1.1 New members

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

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



2. Click on “create a new account”

This screenshot shows the 'Sign In' form on the PMI website. The form is titled 'Sign In' in a large, bold font. It contains two input fields: 'Username' and 'Password'. Below each field is a red label 'Required'. There is a checkbox labeled 'Keep me signed in'. A large pink button labeled 'SIGN IN' is positioned below the password field. At the bottom of the form, there are three links: 'Forgot username? |', 'Forgot password?', and 'Create a new account'. The background of the page shows the same website header and navigation menu as the previous screenshot.

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

HOME


ABOUT

MEMBERSHIP

Create an Account

| | |
|--------------|--|
| Prefix | (None) ▾ |
| *First name | <input type="text"/> |
| Middle name | <input type="text"/> |
| *Last name | <input type="text"/> |
| Suffix | (None) ▾ |
| Organization | Th  |
| *Email | <input type="text"/> |
| Phone | <input type="text"/> |
| Mobile phone | <input type="text"/> |
| *Country | United Kingdom ▾ |

Postal code lookup SEARCH

| | |
|-------------------|---|
| *Address | <input type="text"/> |
| | <input type="text"/> |
| | <input type="text"/> |
| *City | <input type="text"/> |
| *County / region | <input type="text"/> |
| *Postal code | <input type="text"/> |
| Username |  |
| *Password | <input type="password"/> |
| *Confirm password | <input type="password"/> |

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.

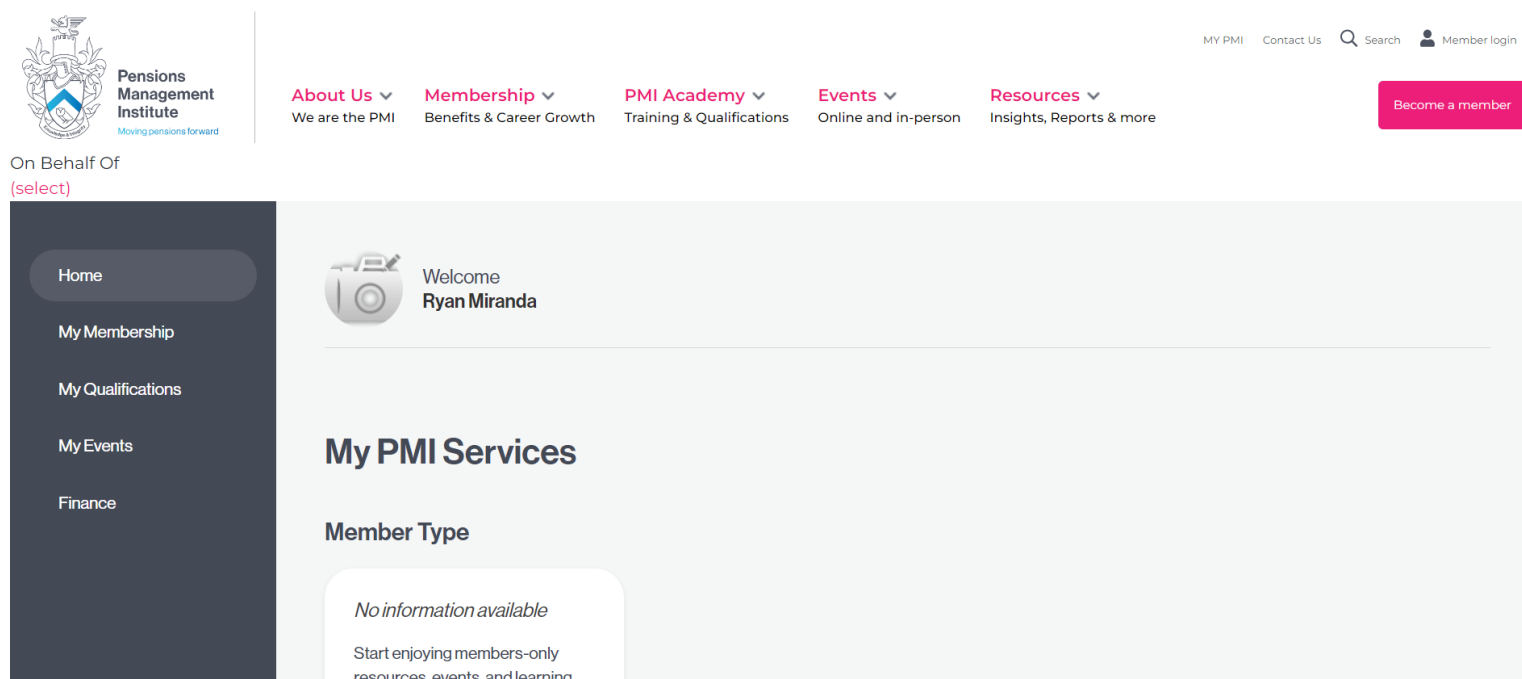
If you create a username, this is what you will use to login to your portal. If you leave it blank, then you'll use your email address to login instead.

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

Save

Cancel

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

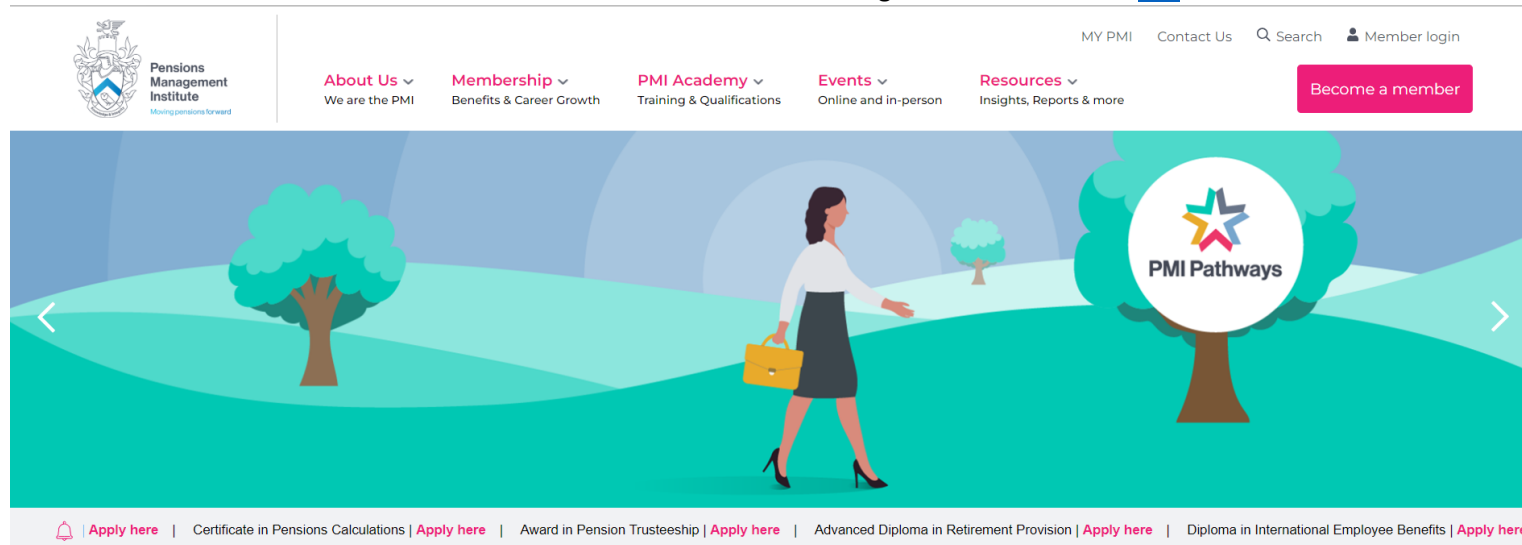


The screenshot shows the PMI website interface. On the left is a dark sidebar with navigation links: Home, My Membership, My Qualifications, My Events, and Finance. The main content area has a header with the PMI logo and tagline 'Moving pensions forward'. Below this is a navigation bar with links: About Us, Membership, PMI Academy, Events, and Resources. A 'Become a member' button is on the right. The user profile section shows 'Welcome Ryan Miranda' with a camera icon. Below this is the 'My PMI Services' section, which includes a 'Member Type' card stating 'No information available' and 'Start enjoying members-only resources, events, and learning'.

1.2 Existing members

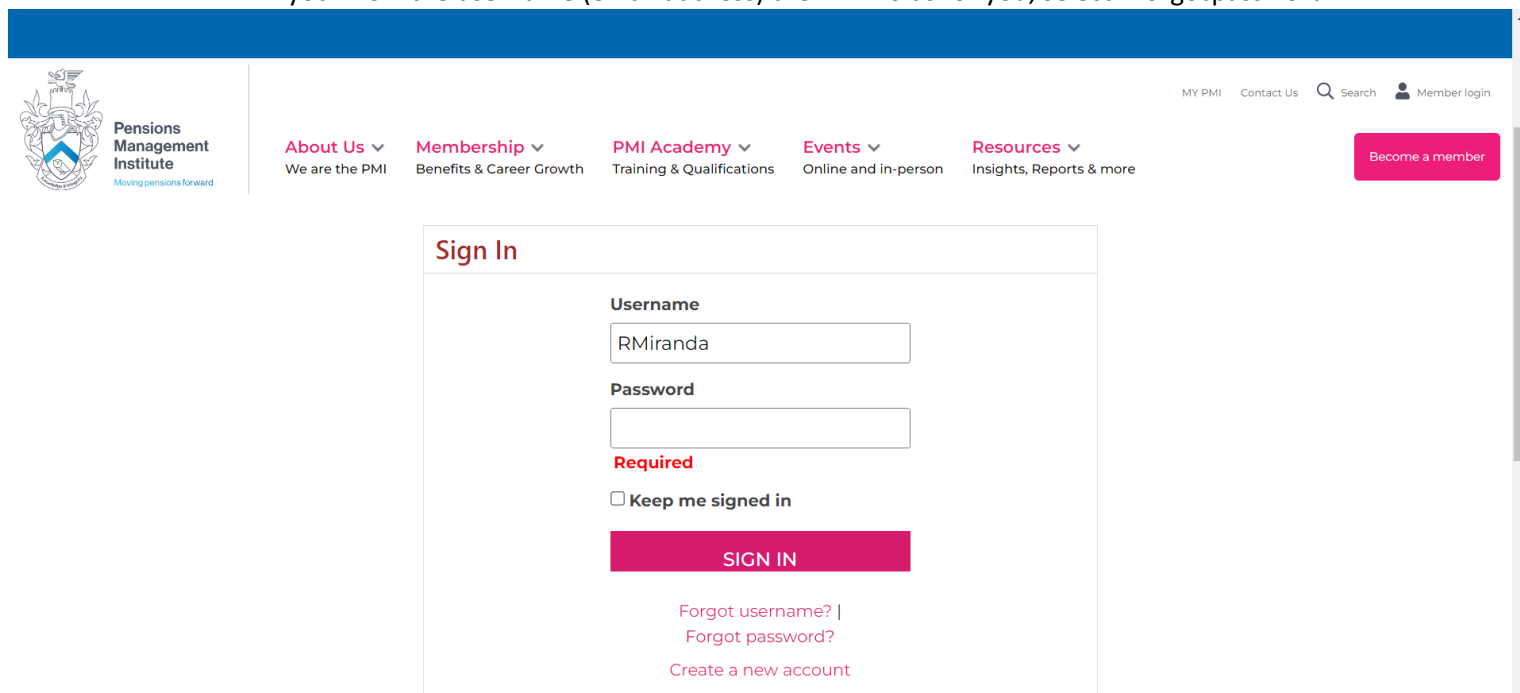
If you have **previously** completed an exam, qualification or attended an event with the PMI, it is likely that you already have an account. **PLEASE** follow the following steps as attempting to create a new account will result in a duplicate account being created which is not ideal and could interfere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

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



The screenshot shows the PMI website interface. On the left is a dark sidebar with navigation links: Home, My Membership, My Qualifications, My Events, and Finance. The main content area has a header with the PMI logo and tagline 'Moving pensions forward'. Below this is a navigation bar with links: About Us, Membership, PMI Academy, Events, and Resources. A 'Become a member' button is on the right. The main banner features a woman walking in a landscape, with a large tree on the right that has the 'PMI Pathways' logo. Below the banner is a row of links: Apply here | Certificate in Pensions Calculations | Apply here | Award in Pension Trusteeship | Apply here | Advanced Diploma in Retirement Provision | Apply here | Diploma in International Employee Benefits | Apply here.

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

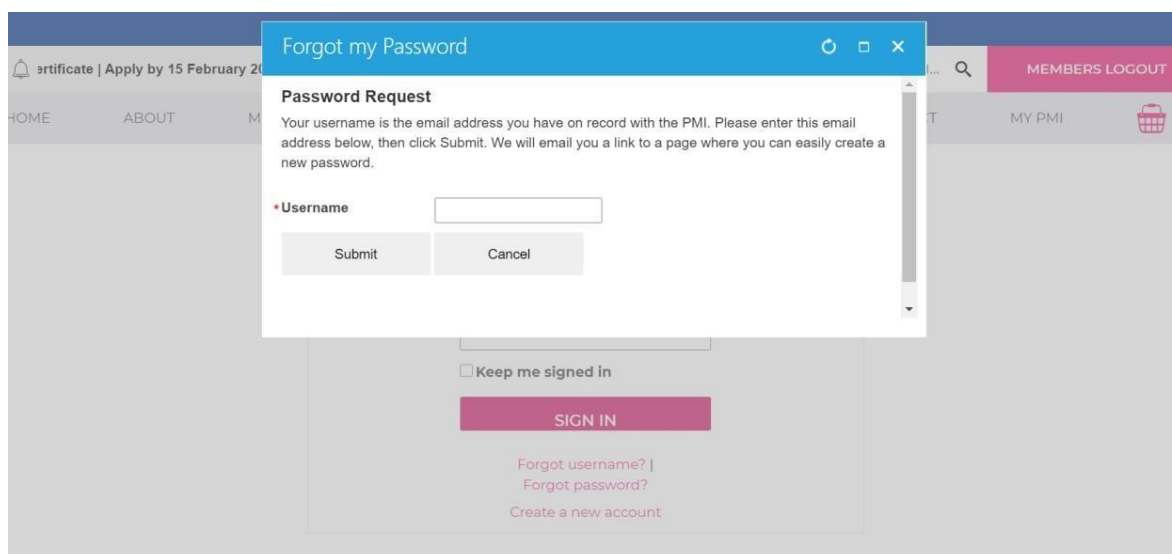


The screenshot shows the Pensions Management Institute (PMI) website. The header includes the PMI logo, navigation links (About Us, Membership, PMI Academy, Events, Resources), and a 'Become a member' button. The main content area features a 'Sign In' form with fields for Username (containing 'RMiranda') and Password. Below the password field is a 'Required' label and a checkbox for 'Keep me signed in'. A pink 'SIGN IN' button is positioned below the form. At the bottom of the form, there are links for 'Forgot username?', 'Forgot password?', and 'Create a new account'.

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


Please follow the instructions detailed in the email received.

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



The screenshot shows the PMI website with a 'Forgot my Password' dialog box open. The dialog box has a title bar and contains the text: 'Password Request' and 'Your username is the email address you have on record with the PMI. Please enter this email address below, then click Submit. We will email you a link to a page where you can easily create a new password.' Below this text is a text input field labeled 'Username'. At the bottom of the dialog box are 'Submit' and 'Cancel' buttons. The background shows the 'Sign In' form from the previous screenshot, which is dimmed.

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



Pensions Management Institute
Moving pensions forward

[MY PMI](#) [Contact Us](#) [Search](#) [Member login](#)

[About Us](#) [Membership](#) [PMI Academy](#) [Events](#) [Resources](#)

[We are the PMI](#) [Benefits & Career Growth](#) [Training & Qualifications](#) [Online and in-person](#) [Insights, Reports & more](#)

Become a member

On Behalf Of
(select)


Home

My Membership

My Qualifications

My Events

Finance



Welcome
Ryan Miranda

My PMI Services

Member Type

No information available

Start enjoying members-only resources, events, and learning

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 “+”

My Membership

My Qualifications

My Events

Finance

Ryan Miranda
The Pensions Management Institute

PMI Number

Member Type

Category

Member Status

Billing ID

Primary Email *

Primary Contact Number *

Job Title

Non Member

rmiranda@pensions-pmi.org.uk

Date of Birth

Member Since

Membership Expiry Date

Renewal invoiced until

Direct Debit (Renewals)

Secondary Email *

Secondary Contact Number

8/31/2022

No

Address

Business +

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

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

The screenshot shows a web form titled "New Address" with a blue header bar. The form is divided into two main sections: "Address" and "Notes".

Address Section:

- Purpose:** A dropdown menu with "Address" selected. This field is circled in red.
- Country:** A dropdown menu with "United Kingdom" selected.
- Postal code lookup:** A text input field with a "Search" button next to it. A blue arrow points to this field.
- 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 Section:

- A large text area for notes.

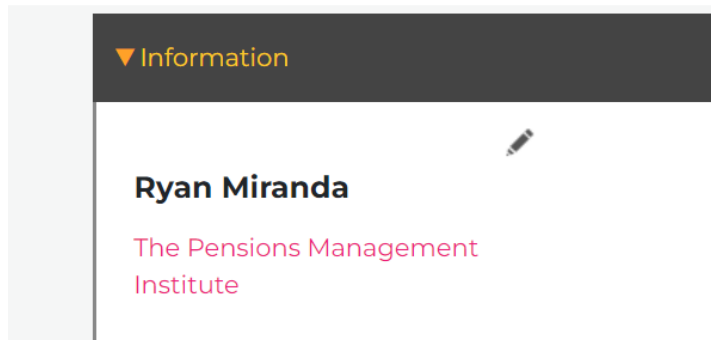
Buttons:

- Save & Close:** An orange button.
- Cancel:** A blue button.

A blue arrow points to the "Save & Close" button.

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.

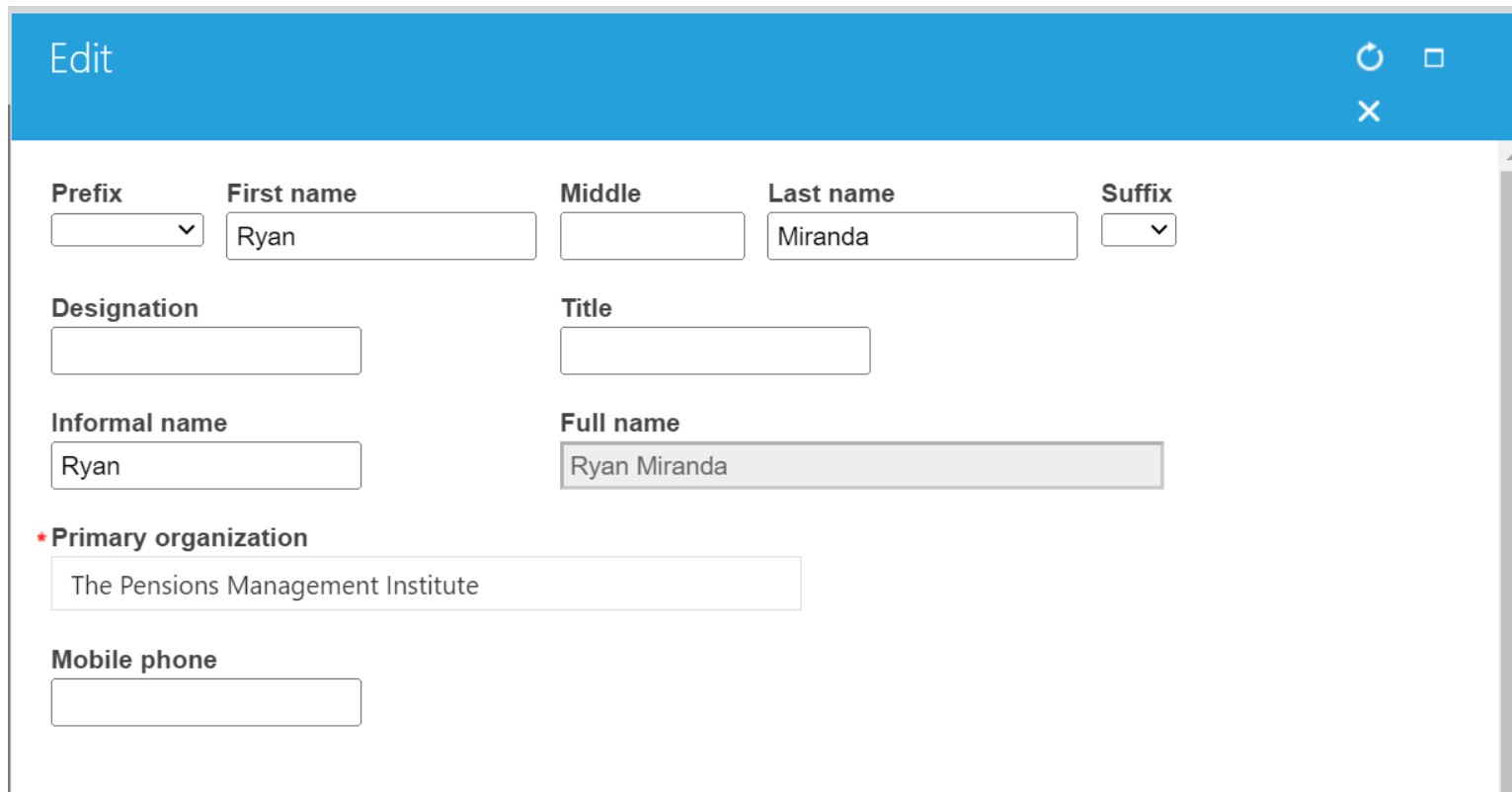


▼ Information

Ryan Miranda

The Pensions Management Institute

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



Edit

Prefix First name Middle Last name Suffix

Designation Title

Informal name Full name

*Primary organization

Mobile phone

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

Open invoices

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



Add To Cart

1.4.1 PDF Invoices

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



**Pensions
Management
Institute**

Moving pensions forward

6th Floor
9 Appold Street
London
EC2A 2AP

Company Number: 01262100

T: +44 (0)20 7247 1452

2. VQ Registrations

2.1 IMPORTANT PLEASE READ FIRST

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

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

APE, CPE, CPA, and DPA qualifications.

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

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

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

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

2.2 Registering for the APE, CPE, CPA, DPA

If you would like to register for one of the VQ qualifications mentioned above, please contact 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 |
| | | |