

PMI Exams- Registration Guide

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1. Exam Registrations: The essentials

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:

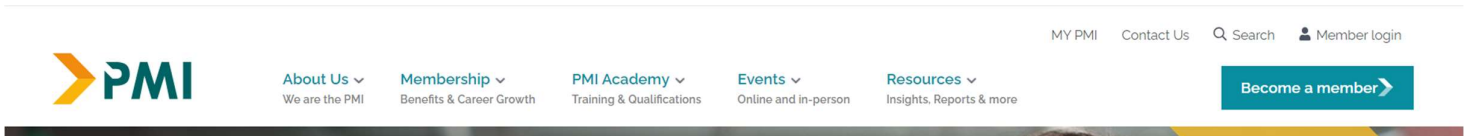
- **Ensure you have a [PMI account](#).** If you do not have one, or if you are new to the PMI, you will need to create an account first. ([please click here for instructions](#)).
- **If you wish to bill your company** for the exam, please ensure the company's details and address are set as the preferred billing address. Instructions for this are provided below*.
- **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.

2. Your PMI Account

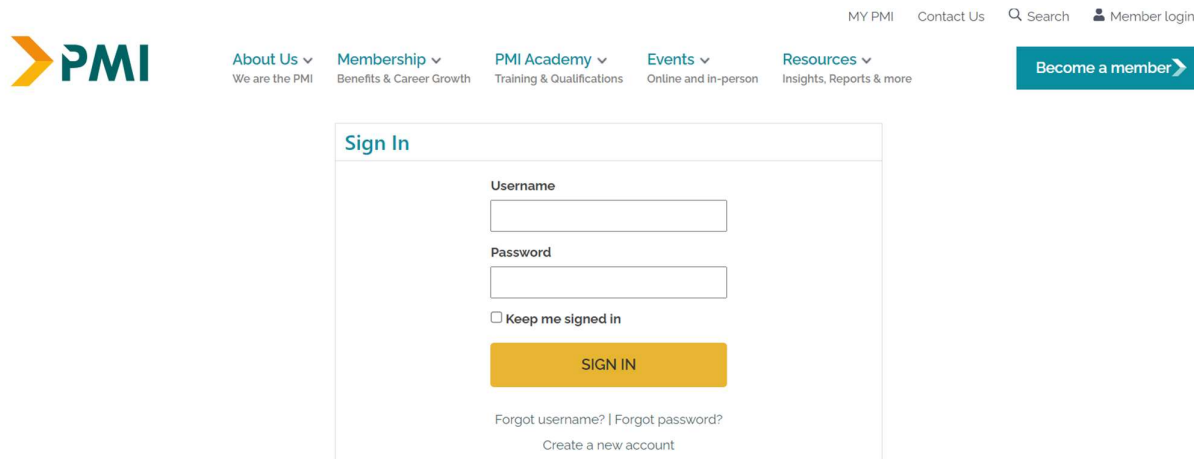
2.1 New members

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 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:

• Postal code:

Username:

• Password:

• Confirm password:

The password must be at least 7 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.

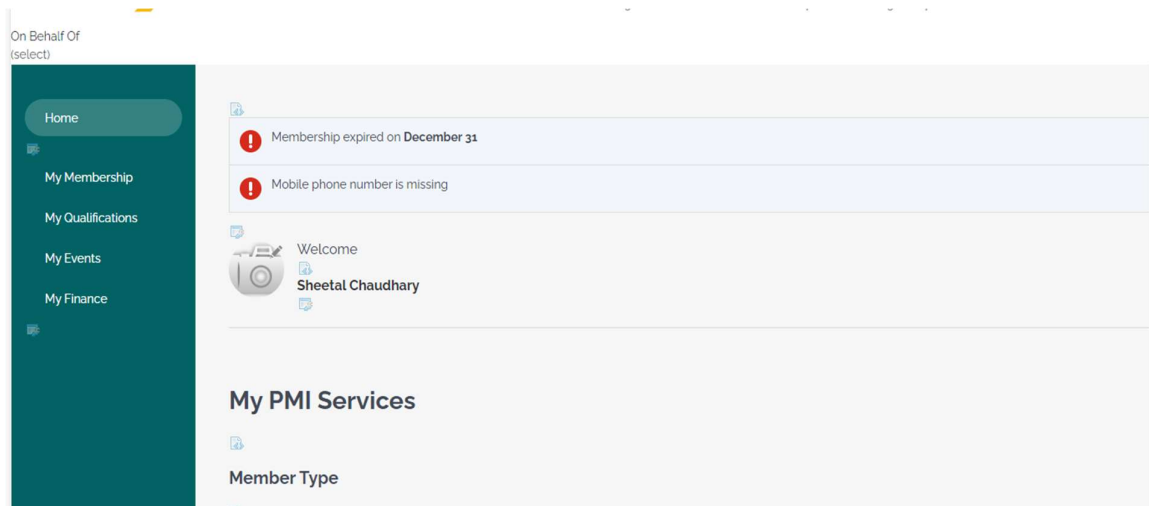
N.B – you can still register prior to PMI doing this step as we will link your account to your organisation once set up.

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. If you leave it blank, then you'll use your email address to login instead.

Save

- 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

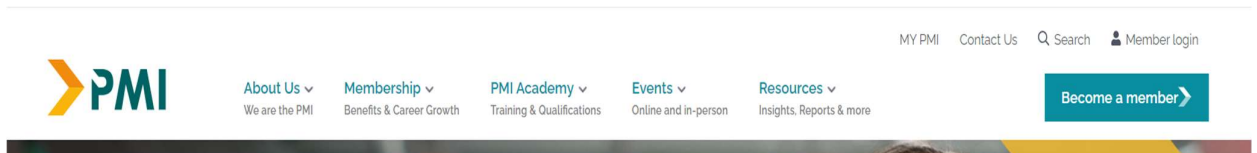
My PMI Services

Member Type

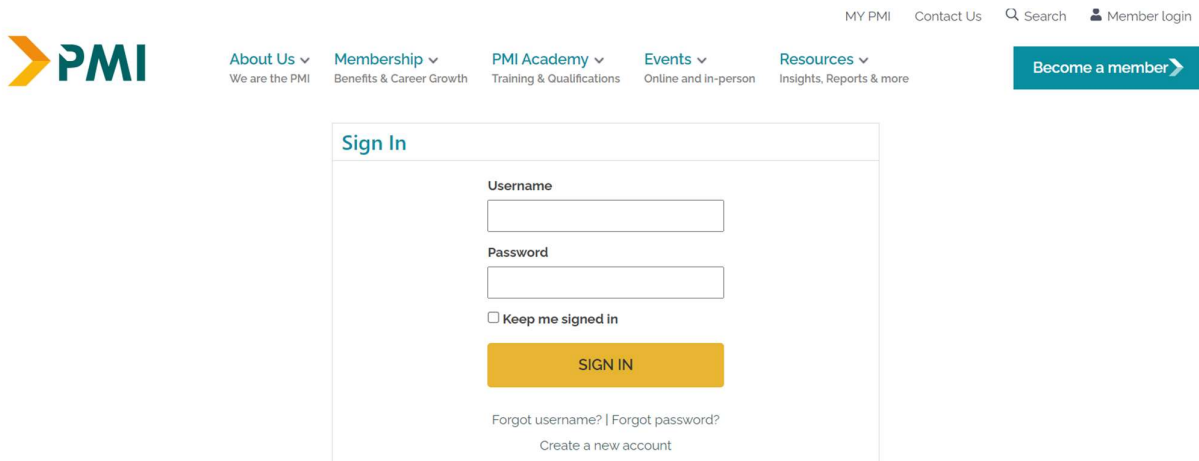
2.2 Existing members

If you have **previously** completed an exam, qualification or attended an event with the PMI, it is likely that you already have an account 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.



The screenshot shows the PMI website's navigation bar and a sign-in form. The navigation bar includes the PMI logo, menu items for About Us, Membership, PMI Academy, Events, and Resources, and utility links for MY PMI, Contact Us, Search, and Member login. A 'Become a member' button is also present. The sign-in form is titled 'Sign In' and contains fields for Username and Password, a 'Keep me signed in' checkbox, a 'SIGN IN' button, and links for 'Forgot username? | Forgot password?' and 'Create a new account'.

MY PMI Contact Us Search Member login

PMI 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

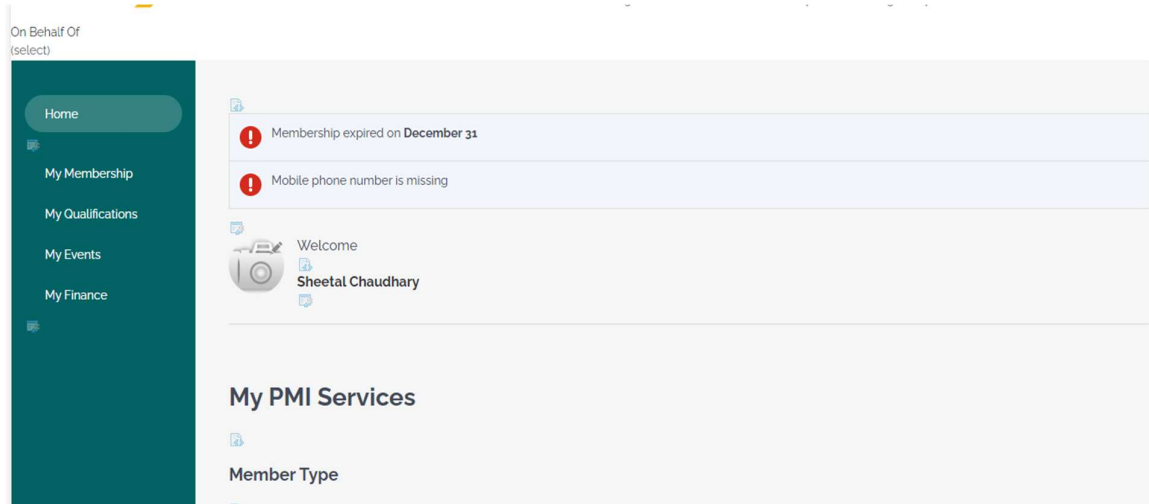
Password

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:



2.3 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.

2.3.1 Updating/ Adding Addresses

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

UNITE KINGDOM	Billing ID	Direct Debit (Renewals) No
SChaudhary@pensions-pmi.org.uk	Primary Email * SChaudhary@pensions-pmi.org.uk	Secondary Email * SChaudhary@pensions-pmi.org.uk
	Primary Contact Number *	Secondary Contact Number
	Job Title Senior Coordinator	

[Edit Your Information](#)

Address

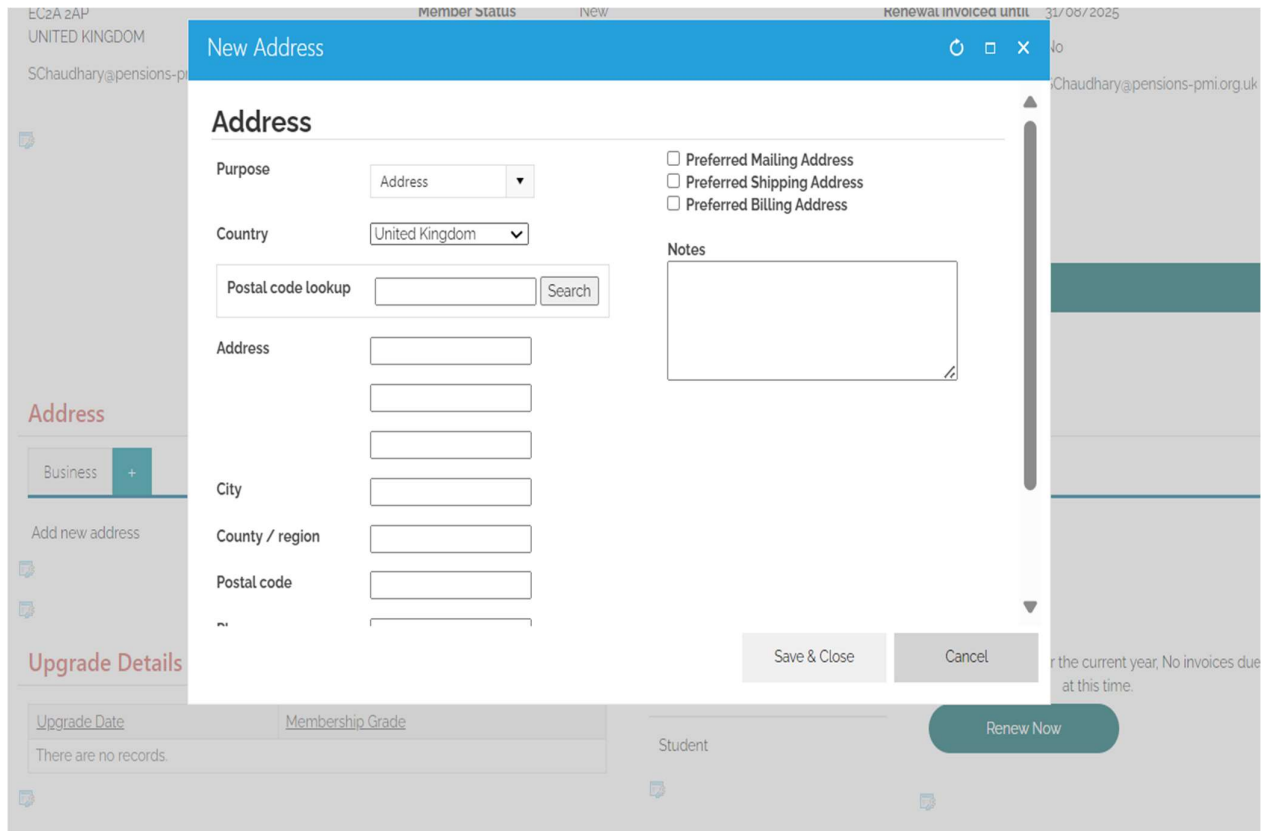
Business +

9 Appold Street
LONDON
EC2A 2AP
UNITED KINGDOM

SChaudhary@pensions-pmi.org.uk

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.

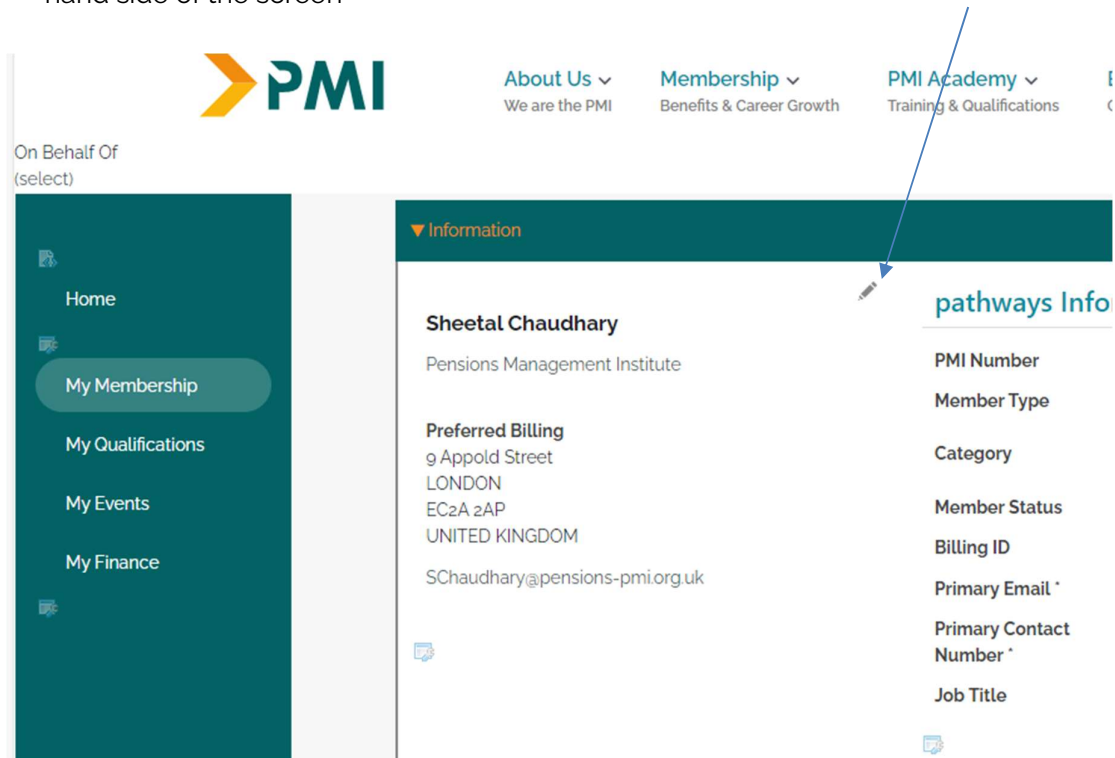
Once all details have been entered, click 'Save & Close.' The new address should appear. If it does not, you may need to refresh your browser.



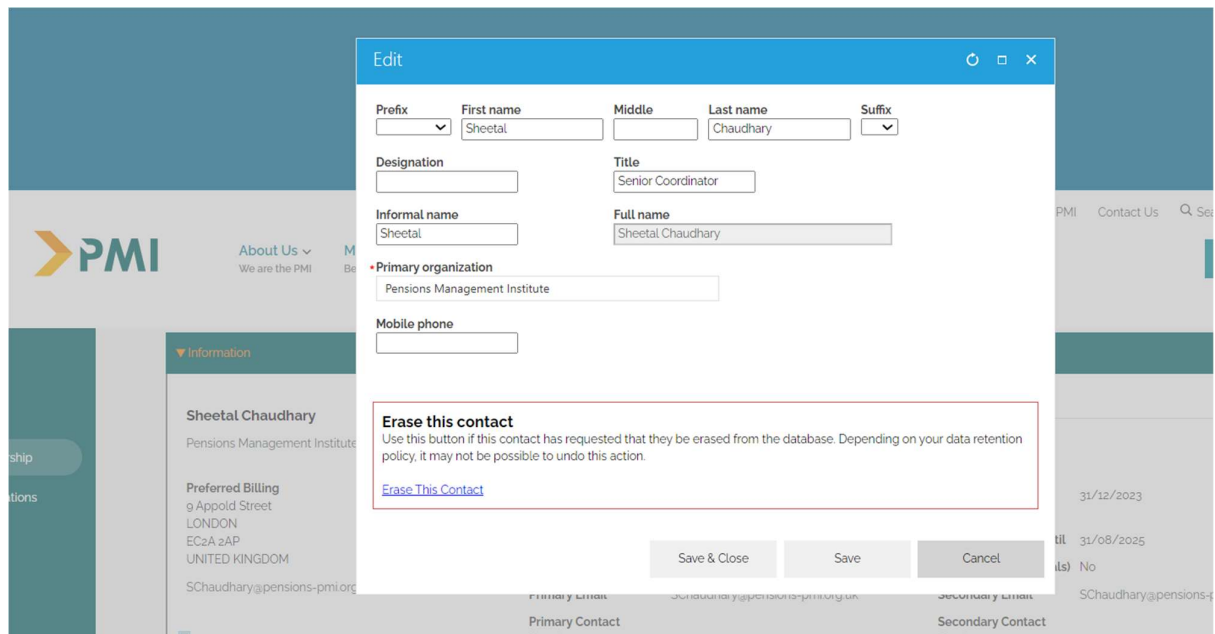
*Please click on Preferred Billing address in case you want this address to appear on your PMI order transactions.

2.3.2 Name and Employer Changes

- 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.

3. Registering for PMI Exams as a Learner

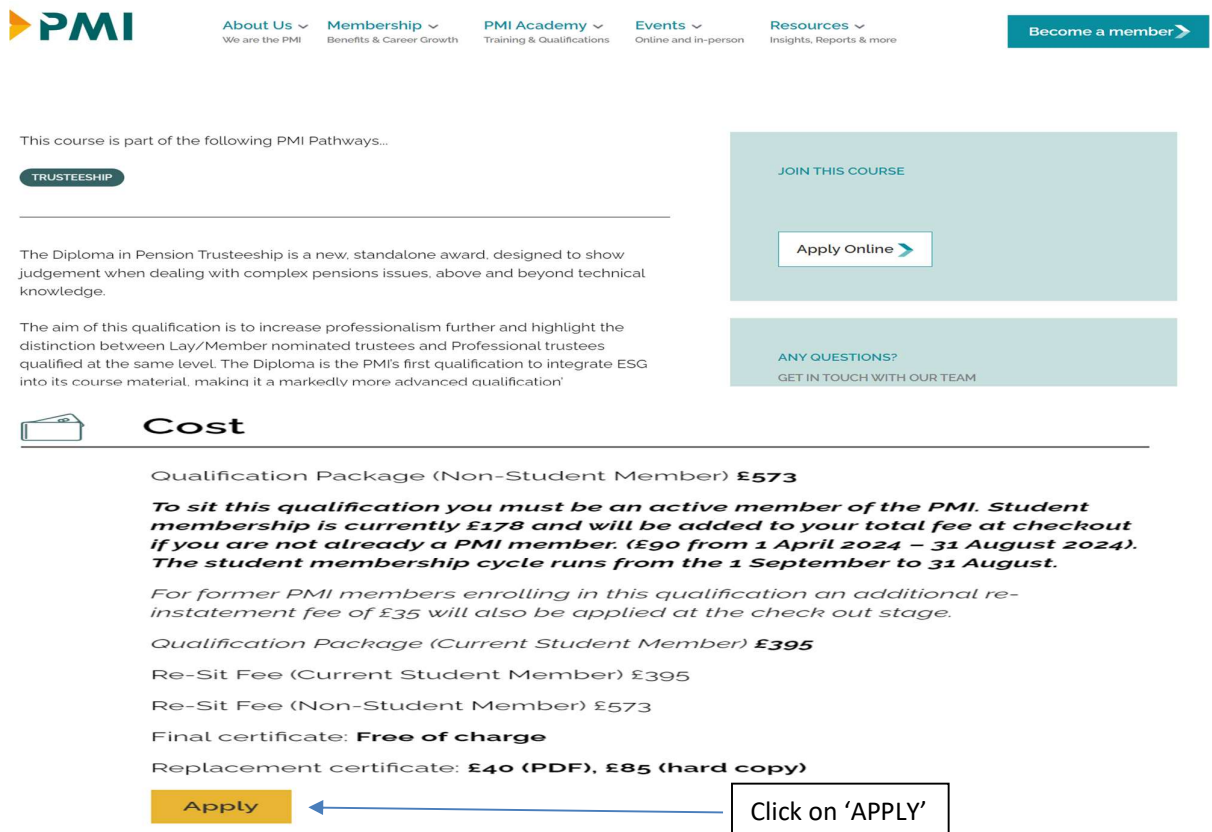
Once your account has been set up, you are now ready to register on to PMI exams .

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](#).

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.



PMI 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](#)

This course is part of the following PMI Pathways...

TRUSTEESHIP

The Diploma in Pension Trusteeship is a new, 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

JOIN THIS COURSE

[Apply Online](#)

ANY QUESTIONS?
GET IN TOUCH WITH OUR TEAM

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](#) ← Click on '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'.

Diploma in Pension Trusteeship

Edit

Diploma in Pension Trusteeship

Price	178.00	<div style="background-color: #008080; color: white; padding: 5px; margin-bottom: 5px; display: inline-block;">Register Myself</div> <div style="background-color: #008080; color: white; padding: 5px; display: inline-block;">Register Someone Else</div>
When	11/4/2024 10:00 AM - 11:30 AM	

Staff use only

Contact Mr James Cumine

Quals Diploma in Pension Trusteeship

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	<p>Diploma in Pension Trusteeship</p> <p style="font-size: x-small;">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</p> <p>Price 395.00</p> <p>Time 10:00 AM - 11:30 AM</p>
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- 5) Once you see the exam has been added to your itinerary, you can proceed to checkout.

Monday, 04 November 2024

▲

11/4/2024 10:00 AM	<p>Diploma in Pension Trusteeship In Itinerary</p> <p style="font-size: x-small;">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</p> <p>Price 395.00</p> <p>Time 10:00 AM - 11:30 AM</p>
--------------------	--

Proceed to Checkout

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

Shopping cart

Override transaction date

Items

Item	Quantity	Price	Total	
Diploma in Pension Trusteeship	1	573.00	573.00	Remove

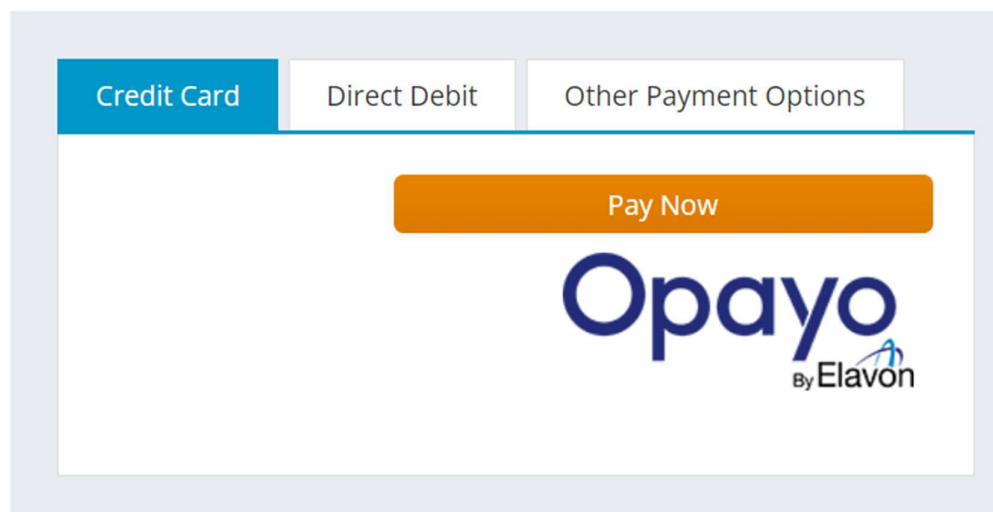
[Update](#)

Cart charges

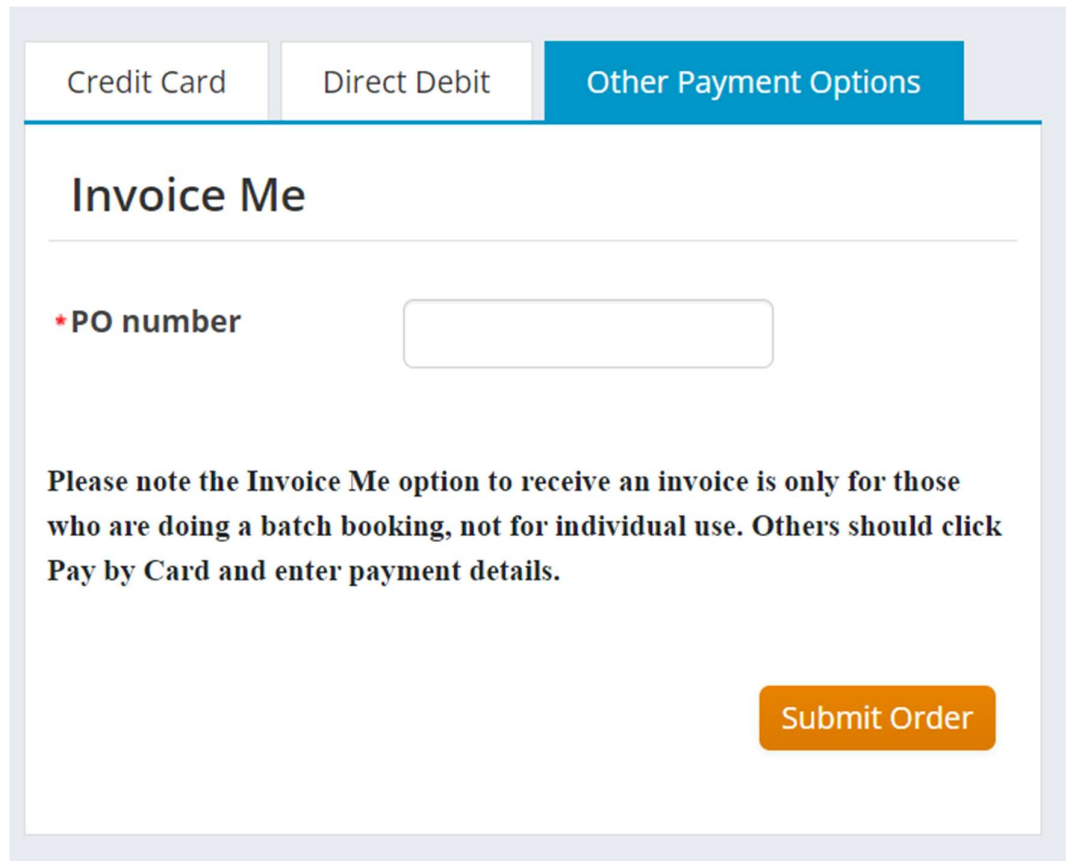
Item Total	573.00
Shipping	0.00
Handling	0.00
Transaction Grand Total	573.00

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.



- 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.

4. Booking Learner/s on to 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 .

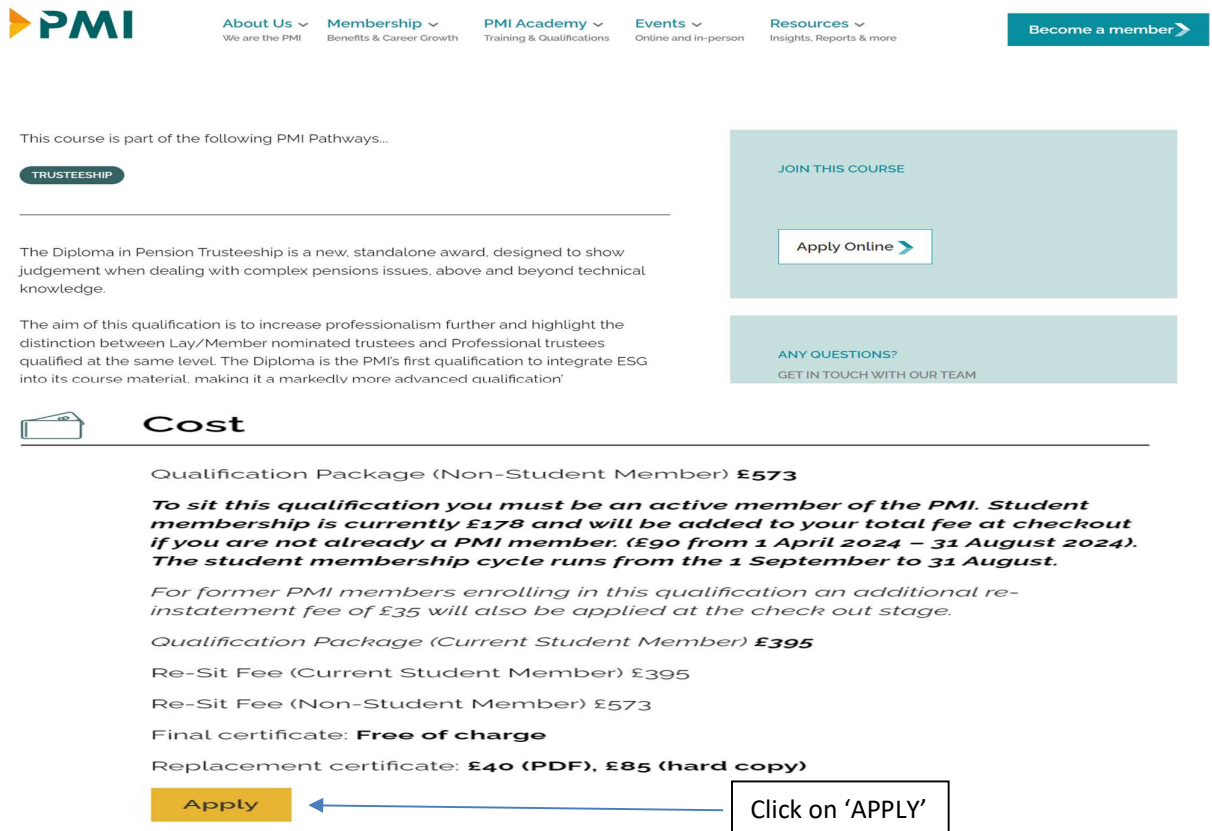
This can be done via following the steps below once you have logged in to your [PMI account](#) :

- 1) As an example, let's presume you would like to book the learners from your organisation on to the Diploma in Pension Trusteeship (DPT) exam , you would visit the respective

qualification webpage through the [PMI website](#).

Diploma in Pension Trusteeship – The Pensions Management Institute
[\(https://www.pensions-pmi.org.uk/pmi-academy/qualifications/diploma-in-pension-trusteeship/\)](https://www.pensions-pmi.org.uk/pmi-academy/qualifications/diploma-in-pension-trusteeship/)

- When bookings open for any of the public PMI exams, you will be able to scroll down to 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.



This course is part of the following PMI Pathways...

TRUSTEESHIP

The Diploma in Pension Trusteeship is a new, 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.

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 ← Click on 'APPLY'

- 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 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

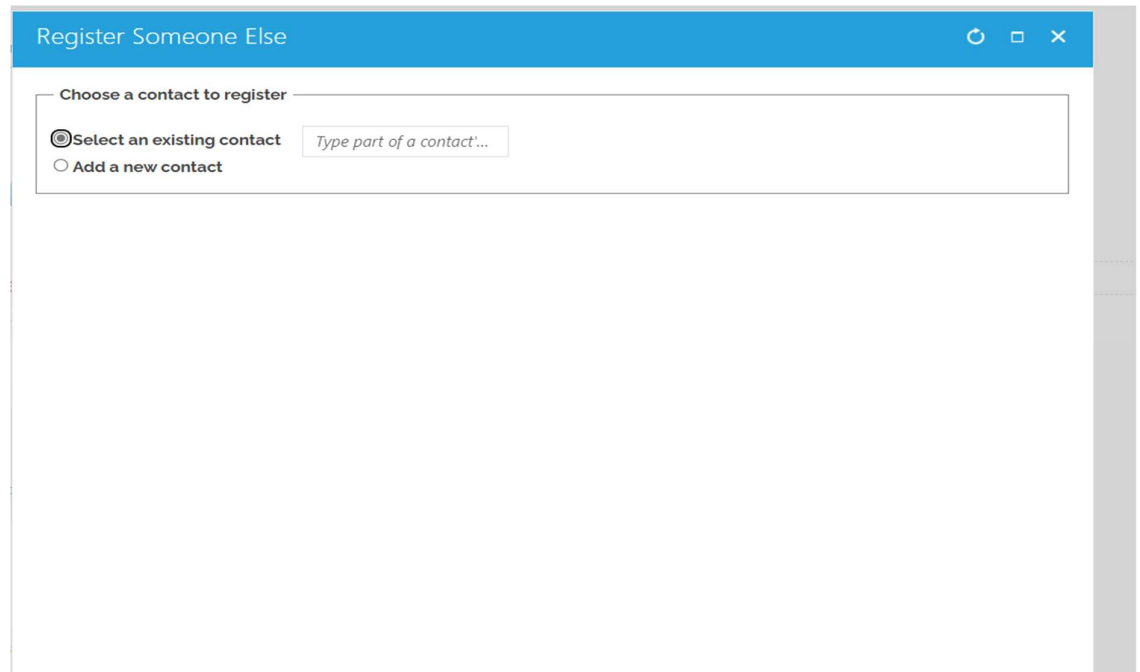
Add

Only display program items in registrant's itinerary

Monday, 04 November 2024

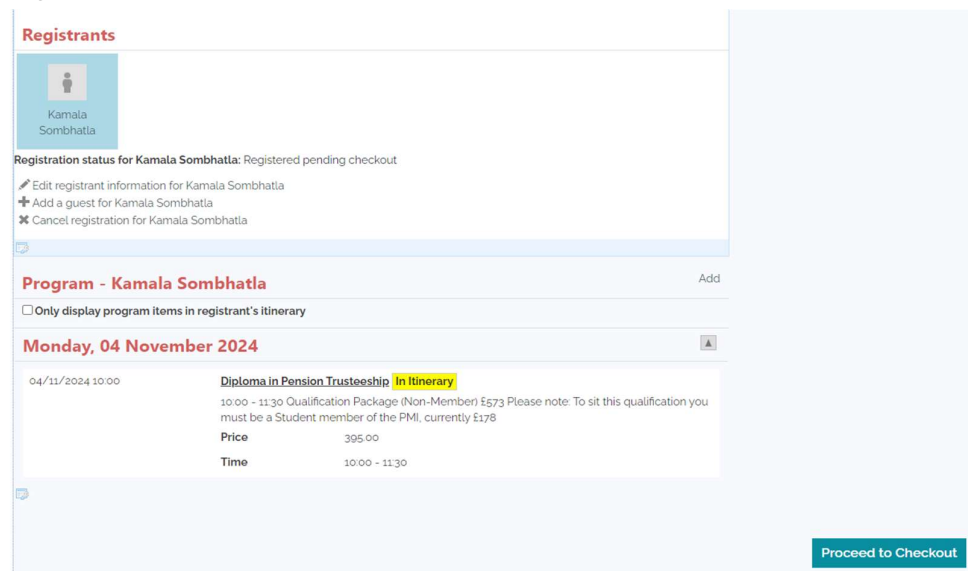
11/4/2024 10:00 AM	<p style="margin: 0;"><u>Diploma in Pension Trusteeship</u></p> <p style="font-size: x-small; margin: 0;">10:00 - 11:30 Qualification Package (Non-Member) £573 Please note: To sit this qualification you must be a Student member of the PMI, currently £178</p> <p style="margin: 0;">Price 395.00</p> <p style="margin: 0;">Time 10:00 AM - 11:30 AM</p>
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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' as 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**

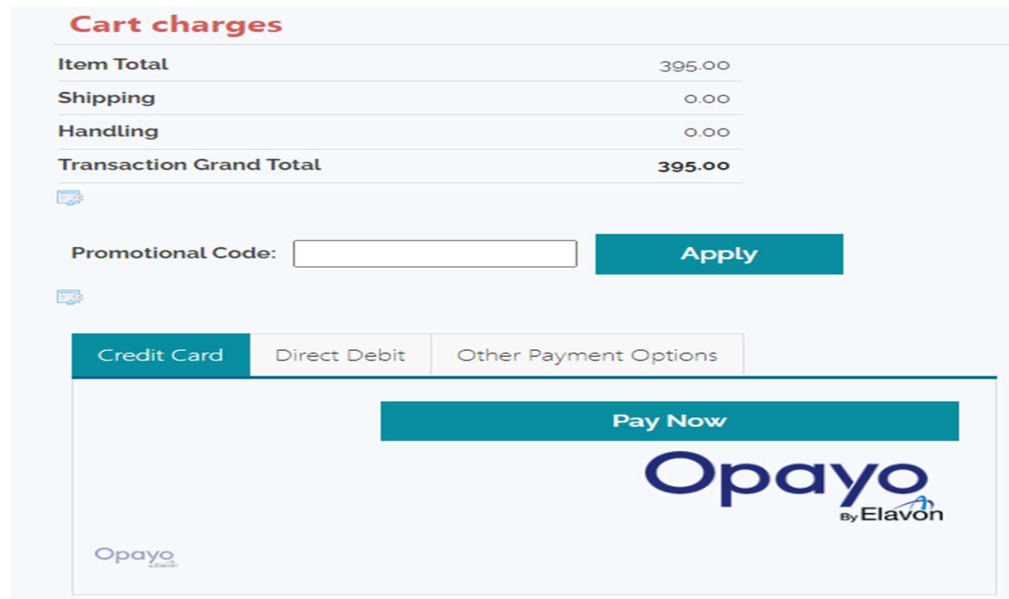
point 3 and 4 above.

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

Monday, 04 November 2024	
11/4/2024 10:00 AM	Diploma in Pension Trusteeship In Itinerary
	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

[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:



Cart charges

Item Total	395.00
Shipping	0.00
Handling	0.00
Transaction Grand Total	395.00

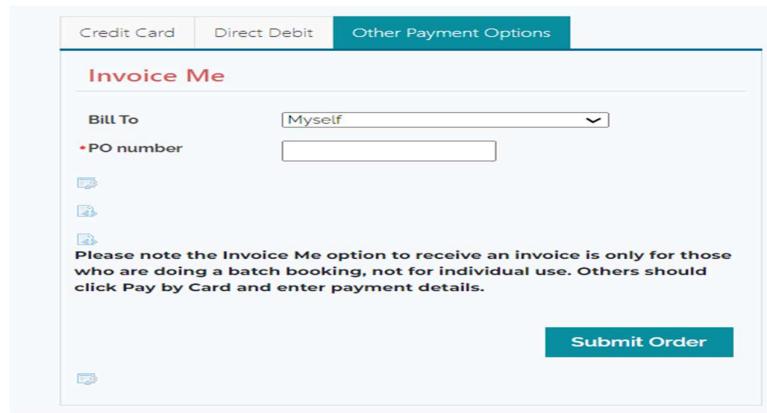
Promotional Code: [Apply](#)

[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:



Credit Card | Direct Debit | **Other Payment Options**

Invoice Me

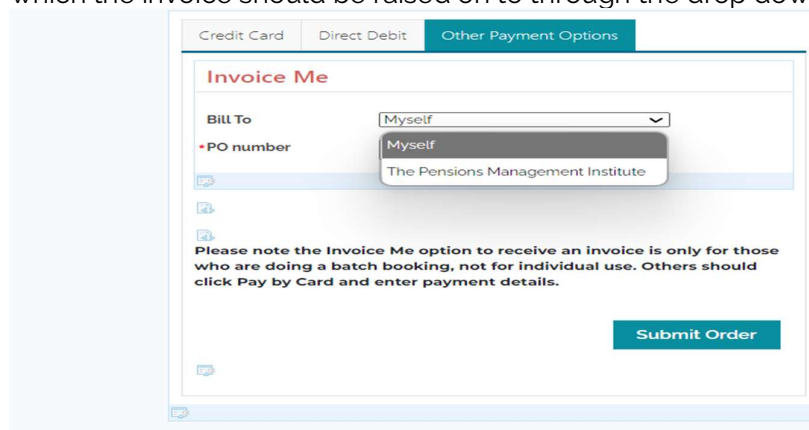
Bill To: Myself

• 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

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.



Credit Card | Direct Debit | **Other Payment Options**

Invoice Me

Bill To: Myself

• PO number:

Myself
The Pensions Management Institute

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.

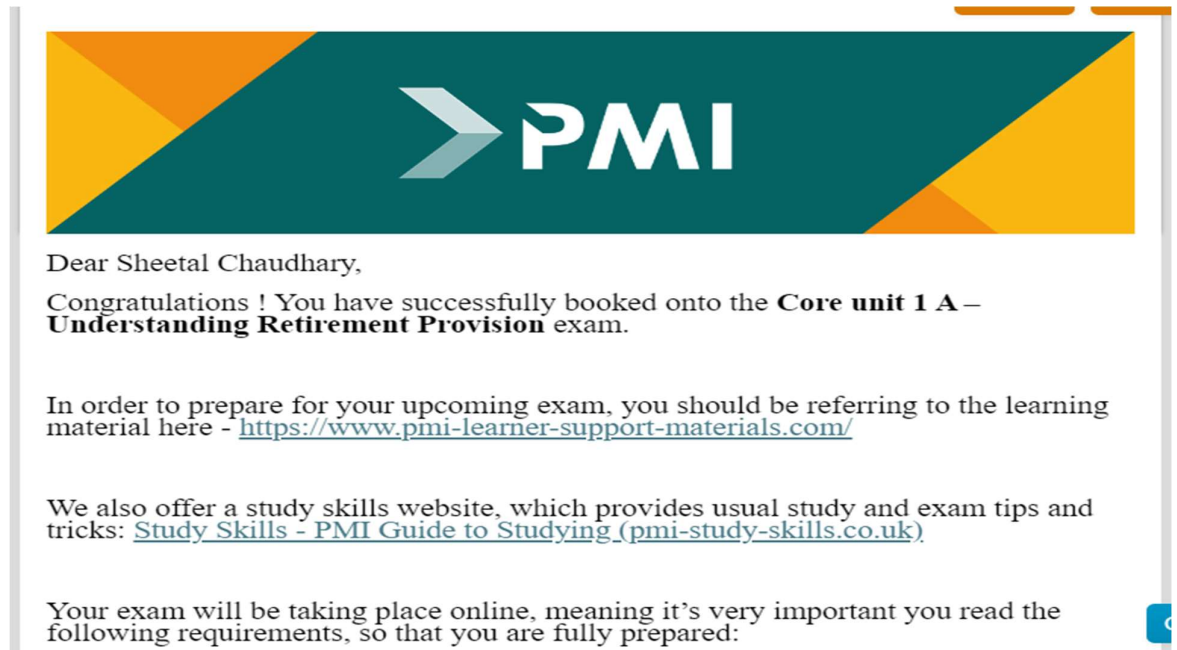
- Once the above steps have been completed, please click on submit order. You, as company administrator, will see the booking confirmation on your screen as well as receive an automated confirmation, email. Example shown below:

Order Number: 13548
Order Date: Oct 2, 2024 10:36 AM
Bill To: Sheetal Chaudhary
Order Total: 0.00

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

Close

- 13) 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:



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



- 15) 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:

Please click here to add/remove the exam units.

Program - Sheetal Chaudhary Add

Select programs by Only display program items in registrant's itinerary

04/03/2025 09:00 Remove	Leavers With Special Circumstances In Itinerary Leavers Part 2 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 09:00 - 13:30
10/03/2025 09:00 Remove	Transfers in and Transfers Out In Itinerary Transfers in and Transfers out 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 09:00 - 12:30
11/03/2025 09:30 Remove	Retirements Without Special Circumstance In Itinerary Retirements Part 1 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 09:30 - 13:00
12/03/2025 09:30 Remove	Retirements With Special Circumstance In Itinerary Retirements Part 2 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""

- 15) 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.

5.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) pmiqualifications@pensions-pmi.org.uk, as all re-sit exam bookings are managed internally.

6.Finding Invoices/Transactions

- 1) 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](#).

▼ 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

2) 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](#)

4.1.1 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

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

View any receipts and invoices below. Click on the PDF export for a printable copy or to email a copy.

Invoice Number Equals
Order Number Equals
Refresh

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