

Examination Guidance for Employers / Centres

Examinations are marked against the performance criteria set out for each unit in the qualification. Learners generally fail because they do not apply the performance criteria correctly or because do not fully understand the rules of the schemes on which they are being tested in the examinations.	
Procedural Failure	<ul style="list-style-type: none"> ➤ Where a learner has not been entered for an examination by the entry closing date ➤ Where a learner attempts an examination for which they have not been entered ➤ Where a learner's personal 'learner number' is missing or incorrect on the answer script ➤ Where a learner's name appears anywhere on the answer script (e.g. where a letter is signed with a name other than 'AN Other') ➤ Where a learner attaches calculation templates or letter templates to an answer script ➤ Where a centre has been proven to have followed incorrect formal procedures relating to the examination
Examination Failure	<ul style="list-style-type: none"> ➤ Any of the case studies have not been attempted (Section A) ➤ Any of the requested letters have not been attempted (Section B) ➤ There are <u>more than three</u> errors against a specific performance category across all of the case studies (Section A) ➤ There are <u>more than three</u> errors against a specific performance category across all of the requested letters (Section B) ➤ There are <u>more than three</u> errors (regardless of performance category) for any of the individual case studies (Section A) ➤ There are <u>more than three</u> errors (regardless of performance category) for any of the individual requested letters (Section B) ➤ There are <u>more than six</u> errors (regardless of performance category) across all of the case studies and all of the requested letters (Section A and Section B combined)
To avoid making <u>errors</u> in Case Studies (Section A – Calculations) learners must:	<ul style="list-style-type: none"> ➤ Use correct personal details from the members' records ➤ Show the full range of benefit options with regard to the scheme rules ➤ Apply scheme definitions accurately to calculate benefits ➤ Understand the statutory requirements for contracting out and know how to apply tax to short service benefits ➤ Set out calculations and determine factors according to accepted procedures ➤ Carry out calculations without any arithmetical errors ➤ Check and recalculate benefits where necessary to meet GMP statutory requirements ➤ Calculate benefits that impact a member's Lump Sum Allowance (LSA) or Lump Sum & Death Benefit Allowance (LS&DBA) and recognise when the available limits have been exceeded ➤ Incorporate special circumstances accurately into calculations (e.g. part-time service, enhanced accrual rates, transferred-in benefits, AVCs and augmentations) ➤ Recognise where lump sum death benefits are payable to legal personal representatives or where the Trustees must use their discretion in determining the recipient(s)

<p>To avoid making <u>errors</u> in Letters associated with Case Studies (Section B – Letters) learners must:</p>	<ul style="list-style-type: none"> ➤ Quote dates used and benefits calculated which match the values from the case studies ➤ Quote benefits which can be paid ➤ Quote benefit options and values in accordance with accepted procedures ➤ Quote complete and accurate information relating to the benefits in accordance with accepted procedures ➤ Provide information only which they are authorised to give and provide information that they are obliged to give ➤ Provide clear instructions to the addressee with regard to the response required
<p>How can learners help themselves?</p>	<ul style="list-style-type: none"> ➤ Fully understand the three schemes being tested in the examinations ➤ Access previous papers (and answers) via the PMI website ➤ Practise answering previous papers under exam conditions ➤ Read previous 'Examiners Reports' and their associated appendices which explain why learners sometimes fail to meet the required standards ➤ Read the 'Advice to Learners' documentation sent prior to the examinations ➤ Consider using the on-line learning (<i>including Case Studies</i>) available from the PMI