

## Local Institute Manual

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| <br>CII | Activities   | <b>45-4</b> |
|  | Examinations –Regulations for Examination Co-ordinators and Invigilators | 1 of 17     |

**This Section provides a sample of the Regulations issued by The CII to local institute Education Secretaries, Examination Co-ordinators and Invigilators. As the regulations are updated every year it is essential that the following sample is used purely as an example and that the latest version is obtained from Customer Service.**

### THE CHARTERED INSURANCE INSTITUTE


#### Regulations for Examination Co-ordinators and Invigilators

April and October Examination sessions 2006

#### Contents:

- Examination documents & stationery
- Invigilators
- Preparing the examination room
- Identification requirements
- Instructions to candidates
- Starting the examination session
- Pre-examination announcements
- During the examination
- Centre inspections
- Regulation violations and disputes
- Conclusion of the examination
- Returning all documents (UK centres)
- Returning all documents (International centres)
- Timetable

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### Examination documents & stationery

What each candidate will require:


- Advanced Diploma, Diploma in Insurance, AFPC & PMI

| Units                      | Blue answer book<br>(Yellow answer book<br>if International<br>centre) | Form B | Graph paper | Pencil | Formula<br>sheet | PMI green<br>answer book |
|----------------------------|--|--------|-------------|--------|------------------|--------------------------|
| 510                        | .  | .      | .           | .      | .                |                          |
| 530-955<br>inc             | .  | .      |             |        |                  |                          |
| P01-P21<br>inc             | .  | .      |             |        |                  |                          |
| G10-H15<br>inc             | .  | .      |             |        |                  |                          |
| J01-J07<br>inc             | .  | .      |             |        |                  |                          |
| All PMI<br>(except<br>101) |  | .      |             |        |                  | .                        |

- Certificate in Insurance (All units prefixed with IF)
- Certificate in Financial Planning/Mortgage Advice (CF1, CF2, CF3, CF4, CF5, CF6, CF7, CF8, CF9)
- Award in Insurance (FIT)
- Certificate in Financial Administration (FA1 & FA2)
- Financial Advisers' International Qualification (AC1)
- PMI 101

| Units                   | Corresponding<br>answer form | Corresponding<br>question book | Corresponding<br>answer book | Form<br>B | Pencil |
|-------------------------|------------------------------|--------------------------------|------------------------------|-----------|--------|
| All prefixed<br>with IF | .                            | .                              |                              | .         | .      |
| FIT                     | .                            | .                              |                              | .         | .      |
| AC1                     | .                            | .                              |                              | .         | .      |
| CF1/2/3/4/6/7/<br>8/9   | .                            | .                              |                              | .         | .      |
| CF5                     |                              | .                              | .                            | .         |        |
| FA1/2                   | .                            | .                              |                              | .         | .      |
| PM101                   | .                            | .                              |                              | .         | .      |

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- **Answer Forms/Formula Sheets/Fact Finds**

These are all enclosed within the relevant question paper packets.

- **Question Books – Emergency Packs**

There will be one emergency pack for each examination session. Each pack contains one question book for each unit scheduled for that session (with the exception of the Financial Advisers' International Qualification at UK centres and AFPC, Diploma/Certificate in Financial Planning/Mortgage Advice, Certificate in Financial Administration at International centres. (PMI question papers will not be packed in the either UK or International emergency packs).

It should only be necessary to open an emergency pack if there is a late entrant to your centre and the spare supply of question books has been exhausted or there were previously no entrants for that unit.

- **Batch Headers (UK centres only)**

To record the number of returned:

- Certificate in Insurance, Certificate in Financial Planning/Mortgage Advice (except CF5) , FA1, FA2, and FIT answer forms and question books;
- CF5 answer books and question books;

- **Form A: Examinations Record**

To record the number of candidates attending and absent from each unit.

A separate Form A is issued for each unit for which there is an entry at the time of production.

A small number of blank Forms A documents are supplied to complete the details of late entrants where there were previously no entrants for that unit.

- **Form B: Attendance Form**

To be completed by candidates for each examination they attend.

- **Form C: Candidate Attendance Register**

To record against individual records whether a candidate was absent (A) or present (.).

A separate Form C is issued for each unit, for which there is an entry, at the time of production. A small number of blank Form C documents are supplied to complete the details of late entrants where there were previously no entrants for that unit. This is a three part document. You should return the top two copies to us and retain the bottom green copy in case of query.

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### • **Incident Report Form (IRF)**

To report any violation of regulations, disputes or irregularities.

Pink for CII

Green for PMI

### **Invigilators**

For sessions with up to 50 candidates, 2 invigilators should be present. For each additional 30 candidates (or part thereof) an additional invigilator should be present.

Where there is only one candidate, one invigilator will suffice provided that another responsible person is within call.

Where both male and female candidates are expected, it is desirable to have male and female invigilators present.

All invigilators must be provided with a copy of the Regulations for Examination Co-ordinators and Invigilators and be fully conversant with the all regulations prior to their arrival at the examination centre.

### **Preparing the examination room**

The following arrangements should take place prior to the arrival of the candidates:


#### **Seating layout**

Desks should be as far apart as practicable. Try to allow at least 3ft between rows. Where this is not possible, stagger the rows so that candidates are not sitting side by side.

If single desks are not used, there should be no more than two candidates to a 6ft table.

Seat candidates in groups according to the units they are taking, to make the distribution of question papers/books and collection of answer books/forms easier.

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### **Allowing candidates into the examination room**

#### **Cloakroom facilities**

All candidates (including those taking the Pensions Management Institute examinations) have been instructed that they must NOT;

- take into the examination room or consult or in any way use any paper, book, document or other written, typed or printed matter (except their admission permit and instructions, form B, the question paper/book and answer book/form);

If secure cloakroom facilities can be provided, candidates should be advised that they must leave cases, handbags, books, revision notes and all paper in them.

If there are no cloakroom facilities, or they are not secure, these articles must be handed to you before the examination. (You should display a notice to this effect)

Mobile phones may be taken into the examination room provided they are switched off and remain switched off throughout the examination.

#### **Identification requirements**

You should check a candidate's approved form of identification and admission permit before entry is allowed into the examination room.


Please note that Pensions Management Institute candidates are now also required to provide the additional form of identification in line with CII regulations

All candidates have been advised to bring identification with them in the form of one of the following:

- a current passport;
- a company identification card containing their photograph and signature;
- a driving licence containing their photograph and signature;
- a national identity document containing their photograph and signature.
- What to do if approved identification is not provided

If a candidate produces identification which is different from those listed, or none at all, complete an IRF and ask the candidate to offer an explanation on the IRF should they wish to do so. Advise the candidate that they may sit the

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paper and that it will be forwarded to the CII with the IRF. You should also advise the candidate that the CII reserves the right not to process the paper or issue a result.

Please refer to 'Regulation violation and disputes – after the examination' on page\*

### **What to do if an admission permit is not provided**

Check the entry listing (form C).

If they appear on the list, advise them of their candidate number and allow them to sit. Do not complete an IRF in this instance.

If they appear on the list but for a different unit from the one they are attempting to sit, advise them of their candidate number and allow them to sit. Complete an IRF. After the examination, ask the candidate to offer an explanation on the IRF should they wish to do so.

If they do not appear on the list, advise them to write their name, PIN and date of birth on the answer book/form and form B (this is the only instance when these details should be used on an answer book/form). Complete an IRF. After the examination, ask the candidate to offer an explanation on the IRF should they wish to do so. You should also advise the candidate that the CII reserves the right not to process the paper or issue a result.


Please refer to 'Regulation violation and disputes – after the examination' on page \*

### **Instructions to candidates**

All candidates (including those taking the Pensions Management Institute examinations) have been instructed that they must NOT:

- converse, communicate with or willingly receive communication from any other person (except the invigilators) in any way during the examination;
- read or attempt to read the work of any other candidate;
- temporarily leave the examination room, except in the case of urgent necessity and accompanied by an invigilator;
- use electronic equipment capable of being programmed to hold alphabetic or numerical data and/or formulae. All candidates must enter the serial number and make and model of any calculator used, on the form B.

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**Mobile Phones** – Mobile phones can only be taken into the exam room if they have first been switched off and remain switched off for the duration of the examination.

Candidates have been warned that any breach of these instructions may result in their disqualification not only for the paper they are sitting but also for an indefinite period.

### **Starting the examination session**

#### **Question books**

The invigilator/presiding officer/exam co-ordinator for each examination session is permitted to open the sealed packs containing the examination papers only in the presence of the candidates for that examination session and another invigilator/presiding officer.

The sealed packs should not be opened earlier than 30 minutes before the start of the examination. This procedure also applies to the emergency pack of examination papers. The examination question books should be distributed not more than 15 minutes before the time fixed for the start of the examination. Candidates should not be permitted to begin writing until the actual starting time is announced.


### **Pre-Examination Announcements**

Once all of the candidates are seated, you should advise them of the location of the fire exits and assembly points and any other relevant health and safety information that you feel is applicable to your centre. You should also inform them that in the event of a fire alarm/drill, they must not discuss the contents of their exam paper and wherever possible, any lost time will be added to the end of their examination.

The following announcements should be made to all candidates prior to the commencement of the examinations:

- it is very important for you to check now that the question book you have been given is the same unit as the one appearing on your admission permit. If there are any discrepancies, please raise your hand at the end of these announcements;
- do not open your question book until the start time is announced;
- complete the blue form B including details of any calculator used and place it on the left hand side of the desk;

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- read carefully the instructions on the answer book cover or answer form;
- it is very important that you complete IN FULL the front of the answer book or answer form and question book;
- if you are completing an answer form, only use the HB pencil supplied by the CII;
- display your admission permit (folded to show your candidate number) on the left hand side of your desk throughout the examination and take it with you when you leave;
- you may do rough work either in your answer book or on the supplementary sheets which can be supplied by the invigilators upon request. In either case the rough work must be neatly crossed through when completed. If supplementary sheets are used for this purpose, they must be either attached inside the back cover of your answer book or handed to the invigilators for destruction at the end of the session;
- you are not allowed to withdraw from the examination within the first hour nor within the last 15 minutes. When you do leave, please do so quietly.
- any breach of part 3 of the instructions to candidates may result in disqualification, not only from the paper being attended, but also for a period of years or even indefinitely.
- if you remove your question book, your paper will not be marked.

### **What to do if a candidate arrives after the examination has started**


Any candidate who arrives within one hour of the start of the examination (within half an hour in the case of one hour exams) should be allowed to sit during the unexpired period of the examination. No extension of time should be granted.

In the event of a candidate arriving late through no fault of their own, for example as a result of a car accident, the co-ordinator should allow the candidate to sit for the remaining period of the session and ensure that an IRF is completed to be returned with the answer form/book. Additional time can only be given at the discretion of the CII, if granted, this must also be indicated on the IRF.

Any candidate who arrives more than an hour after the start of an examination (more than half an hour in the case of one hour exams) should be allowed to sit during the unexpired period. Complete an IRF. After the examination, ask the candidate to offer an explanation on the IRF should they wish to do so. The candidate should also be advised that the CII reserves the right to reject the paper of any candidate arriving more than one hour late (more than half an hour late in the case of one hour exams).



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Please refer to 'Regulation violation and disputes – after the examination' on page\*

- No extension of time can be allowed in any unit (unless otherwise instructed by the CII)

### **During the examination**

You should ensure that the examinations are conducted to avoid any breach of security and events which may adversely affect the integrity of the examination process.

No unauthorised persons are allowed into the examination room during the examinations.

The invigilators should patrol the examination room quietly and at frequent intervals. Talking between invigilators must be kept to an absolute minimum and conducted at a low level.

Neither candidates nor invigilators may smoke.

### **Forms B**

Shortly after the start of the examination, collect the completed forms B from each desk, checking that the number shown on the form corresponds to that on the candidates admission permit. If an admission permit is not produced, you should refer to the form C for the candidate number.

### **Forms C**


All of the collected forms B should be compared with the list of candidate numbers shown on the form C. Any discrepancy must be investigated before the candidate leaves but after completing the examination. The students must NOT be interrupted during their examination. You are required to record whether a candidate was absent (A) or present (✓.).

It is important to complete and return ALL forms C supplied, even if no candidates present themselves for that unit.

### **Forms A**

The number of absent and present candidates should be recorded in the available space on the form A. The forms B should be attached In strict

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candidate number order to the form A which should then be folded around the forms B.

It is important to complete and return ALL forms A supplied, even if no candidates present themselves for that unit.

### **Centre Inspections**

- Inspectors are appointed to visit a selection of examination centres to check the suitability of accommodation and arrangements and to ensure that the regulations are strictly observed.
- These inspectors will present themselves, without prior notice, and show a letter of authority from the CII.

### **Regulation violations and disputes**

In the case of a dispute, follow the procedure below.


#### **During the examination:**

- Deal with the incident, so as to cause the minimum disturbance to the other candidates;
  - In the presence of another presiding official, warn the offending candidate of the breach and explain that the CII reserves the right not to accept the answer book/form;
  - Impound any prohibited documents or materials or devices and inform the candidate that the circumstances will be reported to The CII;
  - Allow the candidate to complete the examination and submit an answer book/form.

#### **After the examination:**

- Complete an Incident Report Form (IRF);
- Invite the candidate to offer an explanation or statement. If he/she does, they are required to sign it in the presence of an official;
- Collect the candidate's form B, answer book/form and question book;
- Attach the completed IRF securely to the front of the relevant answer book/form. Any impounded and or prohibited documents or materials should be placed in a separate envelope and sealed in the presence of the student and another invigilator. Clearly write the student's name, PIN and candidate number on the envelope. The answer book/form and any prohibited items

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should be returned with all other answer books/forms from that day by the agreed method;

- Under the section 'Remarks' on the form A, you should note the candidate number to which the IRF refers;
- Mark the candidate as 'IRF' on the form C and include in the 'Present' total on the form A and the form C.

### **Conclusion of the examination**

When the allotted time has expired, you should:

- Announce the end of the examination;
- Instruct candidates to stop writing immediately;
- Instruct candidates to remain seated during the collection of all examination documentation;

**Remind candidates that they are not permitted to remove from the examination room:**

- Answer books ,forms, question books or supplementary sheets


When collecting the answer books/forms, question books and supplementary sheets, check that the candidates' number and all other particulars required, have been inserted in the correct spaces. Check that any supplementary sheets have been affixed correctly to the answer books.

### **Returning all documents (UK centres)**

Before returning all documents to the CII you should:

- ensure that all answer books/forms are collated in unit and strict numeric candidate number order;
- detach the bottom copy of the forms C for retention by the centre co-ordinator;
- ensure that there is an answer book/form for every candidate who attended the examination by checking against the form C;
- count the answer forms and complete the corresponding batch header (not required for the Financial Advisers' International Qualification);
- protect the answer forms in the cardboard provided;
- complete the forms A which should be signed by two invigilators (unless only one is present as provided for in the regulations) certifying the observance of the regulations. Forms B should be collated in strict candidate number order and form A should be folded around all of the forms B.

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### **Answer Books/Forms**

Parcel Force bags will be supplied (UK centres only, where applicable) for the return of all answer books/forms. Full details of how they are to be returned are on page\*\*.

#### **Forms A & B**

Forms A and B should be returned Daily by 1st class post, addressed to the OMR Co-ordinator, The Chartered Insurance Institute, 42-48 High Road, South Woodford, London E18 2JP. All completed forms A supplied should be returned, even if no candidates presented themselves for that unit.

#### **PMI Forms A & B (where applicable)**

PMI forms A and B should be sent daily, by 1st class mail, addressed to the Pensions Management Institute, PMI House, 4-10 Artillery lane, London E1 7LS. All completed forms A supplied should be returned, even if no candidates presented themselves for that unit.

#### **Question Books**

All question books should be returned by normal post, in one parcel at the end of the exam week, following the instructions provided below (UK centres).

**Before returning the question books, you should ensure that there is one for every candidate who attended the examination by checking against the form C. Batch headers will be provided to UK centres for the return of the question books (Not AFPC, Diploma in Financial Planning, Diploma or Advanced Diploma in Insurance).**


**It is very important that ALL used and un-used question books are returned including those books provided in the emergency packs.**

#### **Parcel Force (UK centres only – as applicable)**

The answer books or answer forms (protected in the card supplied) and the completed forms C only, should be packed in the Parcel Force bags.

We will supply all centres (as applicable) with the correct number of Parcel Force bags for the return of all answer books and answer forms. Our calculation of the number of bags you require, is based on 100 answer books (or the equivalent in forms which is obviously many more) in each bag. Each

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bag will have a label showing which answer books and or answer forms and forms C should be enclosed.

Arrangements will be made for Parcel Force to collect from the centre address (or other address as confirmed by the centre co-ordinator) on Tuesday, Wednesday and Thursday, between 11am and 4pm and on Friday between 2pm and 5.30pm (or as otherwise instructed by the centre coordinator)

The collections will take place as follows:

| Collection to take place on:  | Bag must contain only:  |
|-------------------------------|---|
| Tuesday 25 April/17 October   | Monday am and pm CII answer forms                                   |
| Wednesday 26 April/18 October | Tuesday am and pm CII and PMI answer books /forms (as applicable)   |
| Thursday 27 April/19 October  | Wednesday am and pm CII and PMI answer books /forms (as applicable) |
| Friday 28 April/20 October    | Thursday am and pm CII and PMI answer books /forms (as applicable)  |

**If a collection does not take place please contact the CII immediately. This will enable a replacement collection to be arranged for the same day, or alternatively an increased number of bags to be booked in for collection on the following day (Please note if additional bags are not officially booked in they will not be accepted/traceable on a later pre booked collection).**

If a collection as listed above is not to take place at your centre, due to no entries, we will notify you of this prior to the examinations.


Important – PMI answer forms and books should now be returned in the relevant CII addressed Parcel Force bags. Separate bags addressed to the PMI will no longer be supplied.

You should **NOT** return question books, question papers or un-used stationery in Parcel Force bags

**Return of all used and un-used stationery and question papers.**

Once the examinations have concluded, ALL used and un-used stationery and question papers (including those contained in the emergency packs)

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should be packed together in one box (more if required, depending on the quantity of items being returned.) These items must be returned no later than one week after the final examination.

To return these items:

- Please phone Parcel Force on 08708 501150 and request a collection;
- Please quote contract number H671649 and advise that this will be a 24 hour service;
- Advise them of the number of parcels requiring collection;
- Give them the collection address in full;
- The delivery address is The CII, 42-48 High Road, South Woodford, London E18 2JP. Please ensure that the address is given in full because in some cases, when giving the postcode only, it brings up the CII's old address of 31 Hillcrest Road;
- You will be given a reference number. Please keep a note of this.

### **Returning all documents (International centres)**

International centres should return all answer books/answer forms and forms C in one parcel by DHL immediately after the last examination has taken place. All forms A and B should be sent separately, in one package by airmail at the same time.

It is very important that all forms A and C are returned, even if no candidates presented themselves for that unit.

All international centres should retain the question books, with the exception of all used and unused Certificate in Insurance, Financial adviser's international qualification, Certificate in Financial Planning/Mortgage Advice/Financial Administration question books (if supplied) which must be returned by ordinary airmail immediately after the last examination has taken place.

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### Timetable

The examinations must be held in strict accordance with the timetable.

**A reduced number of PMI units are examined in October, as shown on the timetable.**

#### **Monday 24 April 2006 16 October 2006**

##### **09.30 – 11.30 (2 hour examinations)**

AC1 Financial Advisers' International Qualification

CF1 UK financial services, regulation & ethics

IF5 Motor insurance products

IF6 Household insurance products

J01 Personal tax

J06 Investment principles, markets and environment

##### **13.00 – 14.00 (1 hour examinations)**

CF3 Financial protection

CF9 Pensions Simplification

FA1 Life office administration

##### **15.30 – 17.30 (2 hour examinations)**

CF2 Investment and risk

CF8 Long term care insurance

IF1 Insurance, legal & regulatory

J02 Trusts

J07 Supervision in a regulated environment

#### **Tuesday 25 April 2006 17 October 2006**

##### **09.30 – 11.30 (2 hour examinations)**

CF5 Integrated financial planning

FIT Foundation Insurance Test

IF3 Insurance underwriting process

IF4 Insurance claims handling process

J04 Pension fund options

PMI 101 Retirement Provision Certificate

##### **13.00 – 14.00 (1 hour examinations)**

CF4 Retirement planning

FA2 Pensions administration

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### **15.30 – 17.30 (2 hour examinations)**

CF7 Lifetime mortgage activities  
IF2 General insurance business  
IF7 Healthcare insurance products  
J03 The tax and legal aspects of business  
J05 Pension income options  
P21 Commercial Insurance Contract Wording

### **Wednesday 26 April 2006 18 October 2006 10.00 – 13.00 (3 hour examinations)**

CF6 Mortgage advice  
G10 Taxation & trusts  
P05 Insurance law  
555 Life & disability underwriting  
760 Personal insurance  
770 Principles of marine insurance  
815 Underwriting management  
825 The application of reinsurance  
PMI 201 Pension Arrangements  
PMI 301 Total Remuneration (April date only)

### **14.30 – 17.30 (3 hour examinations)**

G20 Personal investment planning  
P04 Business practice  
530 Business & economics  
780 Aviation insurance  
925 Insurance & the Single European Market  
940 Finance & accounting  
PMI 204 Defined Contribution Schemes  
PMI 304 Communication (April date only)

### **Thursday 27 April 2006 19 October 10.00 – 13.00 (3 hour examinations)**

H15 Supervision and sales management  
P01 Insurance practice and regulation  
P19 Subsidence claims handling  
556 Life & disability claims  
765 Motor insurance  
820 Claims management (non-life)



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920 Lloyd's market supervision  
 955 London market underwriting  
 PMI 203 Defined Benefit Schemes  
 PMI 303 International (April date only)

**14.30 – 17.30 (3 hour examinations)**

G30 Business financial planning  
 G70 Investment portfolio management  
 655 Risk management  
 745 Principles of property & pecuniary insurance  
 755 Liability insurance – advanced  
 785 Principles of reinsurance  
 790 Private medical insurance  
 930 Insurance broking  
 950 North American insurance  
 PMI 202 Law and Constitution  
 PMI 302 Management (April date only)

**Friday 28 April 2006 20 October 2006**  
**10.00 – 13.00 (3 hour examinations)**

G60 Pensions  
 P10 Commercial insurance practice  
 P11 Personal insurance practice  
 P12 Long-term business  
 P13 Marine and aviation insurance  
 P17 Operational management  
 P18 Property claims handling  
 510 Risk, regulation and capital adequacy  
 735 Life assurance  
 750 Commercial property & pecuniary insurances & underwriting  
 775 Marine insurance underwriting  
 945 Marketing  
 PMI 205 Investment