CIMA

FAQ document for the Membership Application Tool (MAT)

Competencies

What do the 'Not Alone' competencies mean?

This refers to the Technical Knowledge area only, as this area is the only area with sub-categories. 'Needs 2/3' and 'Not Alone' refer to how many/what competencies are needed to create categories. 'Needs 2/3' means any two or three competencies from that category will create the category. If a competency is within a 'Not Alone' sub-category then category will only be created when a second competency is selected from a different sub-category.

Can you select two 'Not alone' competencies?

Yes. If two ''Not Alone' competencies are selected and they are from different sub-categories, within the same category, that will create a category. However, if two 'Not Alone' competencies are selected that are within the same sub-category, that will not create a category.

What if my working experience doesn't quite fit the competencies listed?

Each competency has a number of facets to it. Applicants should consider which are the important elements, and decide whether they have that experience.

If I have worked with the same employer for several years but have had different job titles, will I have to submit different competencies for each job role, or can I use the same competency for both roles?

In general, when an employee moves to new roles within a company, their duties & responsibilities change, and therefore the competencies for each role would be different.

Is there a minimum time that needs to be allocated per competency?

Only Business & Technical can have time allocated and the minimum time allocation is 5% of the time in the role.

How do I apportion time and determine how many months a competency covers?

Apportioning time is done as a percentage of the time spent on that competency whilst in that role. The recommendation would be as follows; first decide which competencies you definitely have experience on (in that role). Then realistically apportion how much time is spent on each, (one month, two months etc), then convert that to percentages to input into the system. For example, 1.2 months spent on experience of one competency in a role that you've been in for 12 months would be 10% time allocation. Realistic time allocation is important, it's one of the things that the assessors are paying close attention to.

If I can populate enough competencies at expert level, is there any need to populate lower levels (foundation/intermediate/advanced)?

Please be very mindful of the competencies chosen, and the level they are at. Expert level is usually only gained by those at the very top of the company. The Competency Framework document has information on this. In general, if someone has gained experience at a higher level, and there are corresponding lower level competencies, we would not expect an applicant to include experience of the lower level. Remember, only a maximum of 5 years can be submitted, so there is a limitation to how many competencies can be included.

Does it make a difference if four categories are selected, but maximum time is in one category, and a small fraction is going to other categories?

Please remember that the time allocation is very important, as the assessors are looking for it to be realistic. If the situation you describe is realistic then that would be acceptable.

Verifiers & verification

What should I do if I only had one manager for the whole period of work I am submitting for? Do I still need multiple verifiers?

All applicants are required to provide a minimum of two verifiers to support their application. Your verifier must be someone you report directly to, who has direct knowledge of the work that you do. In the event where you only report to one manager, your manager's direct line manager can also be used to provide verification for your application.

If my manager has left the company can I still use them as a verifier if I am still in contact with them?

Yes, as long as they have direct knowledge of the experience you are asking them to verify. Please ensure you only put them forward to verify experience that you gained whilst they were your line manager. For example; if you worked somewhere for two years, but the verifier only worked there for one of those two years, you would only ask them to verify the one year that they worked there.

Can I have two different verifiers for one competency? For example, if I did forecasting for three companies?

Yes, you can add two different verifiers to one competency, because verifiers are added to roles, not individual competencies. Please note; copying and pasting of narrative is not advisable. It's highly unlikely that one task (competency) that was done in one company would be done exactly the same in a different company, so please ensure that this is reflected in the narrative evidence.

What would happen if I began completing PER with one employer and then began employment with another employer? Who could verify the experience with a previous employer?

The applicant would have the relevant manager verify the experience which they reported to them. Remember, the applicant can edit the verification employment period for each verifier to reflect the time they reported to them.

Can a role be verified by more than one manager?

Yes, a single role can be verified by more than one manager.

If an application is deferred and parts of it need to be strengthened or clarified, would the application have to be re-verified?

Any verified competencies listed on your application, which you choose to edit will automatically need to be re-verified by your verifiers.

If I have a dual role where I have two different line managers, how is it best to complete my application?

Applications must be completed by the applicants themselves. It is possible to have your two lines managers as your two verifiers. You will need to ensure your verifiers are verifying a minimum of 36 months experience. This must include a minimum of 18 months of experience from your Business and Technical competencies. These competencies must also be at intermediate level and above. If you have two verifiers and they are verifying the same role but different employment periods you will have the option to edit their verification dates to reflect the employment period you reported directly to them.

Does the verifier have to be a qualified accountant?

No – they just need to be more senior than you and have direct knowledge of your experience. In most cases this would be your line manager.

Is it an issue if my line manager has a different accounting qualification to CIMA?
Your verifiers do not need to be members of CIMA. You verifiers simply need to be someone that has direct knowledge of the work that you do.

Roles and experience

Are there any example narratives available, to help with structure and detail?
Unfortunately, we don't provide applicants with competency samples due to the risk of plagiarism. When writing your evidence, think of the context of the competency and about adding depth to your narratives by detailing exactly what you have done that evidences the competency, how you went about it, how often you were doing it, and what the outcomes were. Please ensure that you write in the first person, so that it's clear you're talking about what you've done yourself.

Simple statements that just reflect the actual competency don't really evidence the necessary experience has been gained. No single competency is identical to another, so each narrative should be solely focused on evidencing that particular competency.

Please refrain from using bullet points and ensure you provide full explanations on how you have satisfied each competency category chosen.

As a guideline for each Foundational competencies listed you should aim to write between 150-250 words for each individual competency. For competencies at Intermediate level and above you should be aiming to write between 250-500 words per competency. Depending on the competency level you have chosen will determine the level of detail you should write. For instance, If you have a competency level which is listed as "Expert" our assessors will expect more detail to be included in comparison to a competency which is at "Foundation" level.

As general guidance, before you submit your online application please consider the following:

- Have I written in first person? Have you explained your personal contribution on how you have satisfied each competency? A lot of the time applicants can make the mistake of advising what their team does as opposed to what they personally do.
- Have I provided enough detail? It is imperative that you not only explain what you have done but how it has been done. A lot of the time, our assessors can defer an application because the applicant has not explained how they satisfied the competency category

chosen.
- Have I ensured each competency listed is unique? Our assessors cannot assess an application if the applicant has duplicated information across competencies.

Am I able to set a role 'end date' to 'ongoing' if I am still currently in that role?

If you have added a current role, the system will provide you with the option to state this. Therefore, no end date will be required, but please remember that the system will prevent submission if there are more than 5 years and if you've input 5 years, and have 'Current role' ticked the system will be continuously adding time.

If I have more than 60 months experience, should I limit it to 60 months or input my actual employment dates?

The system will only allow you to record a maximum of 60 months experience. You will need to choose which experience you would like to be included within your application. But this cannot exceed 60 months.

Can you input two jobs that overlap? For example, if one of the jobs was part-time?

Yes, when you record your experience you have the option to advise whether the job role added is full time or part time. The system will not allow 2 full time roles to have simultaneous/overlapping dates but it will allow full time & part time.

Do I need to have a continuous period of 36 months for the PER submission? Or can I have a total of 36 months of relevant experience over a longer period where I have done other non-finance roles?

The experience doesn't have to be continuous, nor does the sum total of time allocation in a particular role need to be 100%. So, yes 36 months of experience can be gained in a longer time period, however, the maximum time period that can be submitted is 60 months.

I perform a finance role as a stand-alone function in a small business, and report to the CEO. How do I represent experience that is both 'doing' (functional) and 'leading' (advanced)?

The easiest way to represent this would be by the levels of the competencies. Foundational (and maybe some Intermediate) competencies would represent the 'doing' whereas Advanced (and maybe some Intermediate) competencies would represent the 'leading'.

If submitting a combination of two roles amounts to over 60 months, do I have to reduce the time in one of the roles?

The maximum amount of months which can be submitted for assessment is 60 months. If an applicant exceeds this requirement, they will simply need to choose which employment period they would like to be submitted for assessment. If necessary, you can simply amend the dates on your application to ensure the total amount of months recorded does not exceed the 60 month requirement.

General queries

How much time do I have to submit my membership application after passing my exams?

The submission deadline for any student is September 30th of the fourth year after the year they sat and passed their final exam. For example, if the student sat the strategic case study exam in November 2016 (received their results in January 2017) then their submission deadline would be 30/09/2020. If the student sat their strategic case study exam in February 2016 (received their results in April) then their submission deadline would also be 30/09/2020.

When inputting my work address, should I input my office or the company's head office?

The address confirmed on the application must reflect the location of the office you work within.

If my application is deferred, do I need to pay for another application submission?

The Membership Application fee is a once-only payment; any applicant who has been deferred does not need to pay it again when re-submitting.

How detailed should the career progression summary be? Is there an example available?

Your Career Summary should be similar to a CV. It should document when you completed full time education and list each job you have had, giving a brief summary of the tasks you carried out for each job role (bullet point format can be used).

An illustrative example of the Career Progression Summary is included here (located at the bottom of the webpage).

Can I submit my CIMA membership application prior to receiving my strategic case study results?

Applicants can submit their membership application once they have passed all three strategic level exams (E3, F3, P3), or if they have been exempted from them.

How long does the membership application assessment process take?

Once a submitted application has been checked and is ready to go for assessment, it will take approximately 4 weeks to obtain a decision. If an application is not deemed suitable to go for assessment, further information will be requested and the 4 weeks waiting time will only start from the point of it being suitable to go for assessment.

If my application is deferred, how long do I have to wait before I can reapply?

Unless the assessors have specified when they feel you should resubmit your application, you can resubmit your application at any time. You will need to ensure you have read the assessor comments on your deferred application and update your resubmission application accordingly.

What does TOC mean after my name on the My CIMA page once I have logged in?

TOC is legacy term from a previous CIMA Syllabus, and it means student at 'Test of Professional Competence' level.