Applying for CIMA Membership

Applicant user guide
Membership application online guide

Applicant logs into My CIMA
After being successfully logging into My CIMA, the login screen is shown below, you will see the existing old process link and the new membership link. You will have 9 months from February 2016 to decide which process you wish to use, after which the old process will be decommissioned and you will only be able to use the new process and submit your practical experience using the 2015 competency framework.

Please print this guide to assist you in completing your application.

Both systems will run concurrently between February 2016 and December 2016.

Figure 1. – My CIMA homepage after successful login.
Brand new applicant view

You can start a Practical experience application after finishing the 5 CBA papers. If you have not completed CBA, you won’t see any link with regards to membership applications.

Once you have clicked on the link, you will be navigated to one of 2 pages; the new applicant view or the returning applicant view. You will be taken to the new applicant page only if you don’t have an application in draft or closed or already submitted.

Click on start button to start a new application

Upon submitting a fully completed application, this is then sent for assessment (subject to any further enquiries that may need to be made), this process can take approximately 2 weeks.
Returning applicant view

If you already have a draft application, after clicking the link from My CIMA, the page below will be displayed. The page below is also used for checking the status updates of the application after submission.

![CIMA membership application](image)

Click on Continue button to resume application
My personal details page

CIMA membership application

Your personal details
On this screen, we will show you the personal & contact details that we have for you on file, please confirm and update these as necessary.

<table>
<thead>
<tr>
<th>Title</th>
<th>Prof</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Alex</td>
</tr>
<tr>
<td>Middle Name</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>Ferguson</td>
</tr>
<tr>
<td>Date of birth</td>
<td>05/03/1978</td>
</tr>
<tr>
<td>Gender</td>
<td></td>
</tr>
<tr>
<td>Nationality</td>
<td></td>
</tr>
</tbody>
</table>

Personal details as held by CIMA are confirmed here.

You can change your email address if required. This also changes for My CIMA at the same time against your personal details.
You can also update telephone details

Click “Update” to change the telephone numbers we hold for you. You can add up to 3 numbers of different types. Mobile, Home and Work.

After you have confirmed your telephone number(s) and email, click on the continue button to show address information.

Use the update button to edit the address we hold for you. If you are happy with the address, just click “Continue”.

Use the update button to edit the address we hold for you. If you are happy with the address, just click “Continue”.
My employers page

Use the page below to add all your employers you wish to provide relevant practical experience for. You will need to provide start dates and end dates for each employment as well as other details.

An employment can be paid or voluntary and you need to provide details of any extended leave while at an employer e.g. maternity, paternity or other extended leave.

Click on “Add an employer” to create a list of employers where you have gained relevant experience.
Provide details of sabbatical, maternity, paternity or any other type of extended leave while at that employer.
Provide details of maternity, sabbatical, Paternity or other extended leave.

Select the leave type here then provide start date and end date.

After adding one employer, below is what your employment history will look like. You will now need to add at least one role for that employer before you continue to the practical experience page.

Your employer has been created. You can also change or remove them.

You now must add a role against the employer.
Completed role details below

**My employers > Edit role**

Please detail any paid, unpaid or voluntary roles in this section. If working part time, approximate the number of days per week, you did which could be in decimal point e.g. 2.5 days/week.

**Company Name**
British Telecommunications Plc (4th May 2008 - 12th May 2015)

**Job Title**
Finance Analyst

**Number of employees in your department**
200

**Number of employees reporting to you**
4

**Part time or full time?**
- Full Time
- Part Time

**Job Title of person you reported to**
Credit control officer

**This is my current role**

**Role Start Date**
04/05/2008

**Role End Date**
10/05/2015

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**If you need to change a role**

Role added.
You can add further roles for the same employer as required.

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Reminder of the date at the employer.
Practical experience page

Click on a competency area to see further sub categories under the area. Click again to return back to where you were.

This button shows all experience you have inputted so far in a single report.

Checks you experience against CIMA’s practical experience requirements.

Navigate to the verification screen after populating all your experience.
Click on the competency area to show the categories and types below.

NOTE: Click a second time to reset the view and see all the areas again.

Select Competency Area
Technical Skills

Click on the category to show the types below.

Select Competency Area
Technical Skills > Financial Accounting and Reporting

Click on the type to show the levels.

Select Competency Area
Technical Skills > Financial Accounting and Reporting > Professional Accounting Standards

My experience summary
Please find below a summary of experience that you have input so far. When you have roles that have overlapping competencies, please address by selecting the necessary overlap and allocating your time in that role accordingly. Once all overlaps have been established, you can then proceed to allocate a verifier on the next screen. Please do not attempt to allocate a verifier to experience that has overlapping competencies that you have not allocated your time against.

Is my experience ready?
After clicking on the competency, click continue to populate further details.

Use this button to add this competency for a role at an employer.

After clicking on the level, the actual competencies are displayed below.

Click on an actual competency to continue.
Below is what the competency looks like after the competency is saved,

**Select Competency Area**

Technical Skills > Financial Accounting and Reporting > Professional Accounting Standards > Foundational

**Select Competency**

** Demonstrate awareness and knowledge of the professional accounting standards. **

Please specify the role where the competency was gained:

<table>
<thead>
<tr>
<th>Employer</th>
<th>Role</th>
<th>Competency Period</th>
</tr>
</thead>
</table>

Description:


*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.*

**Select employer and role. The system will pre-populate the role dates.**

**Add detailed description of how you demonstrate the competency.**

**Competency is highlighted a different colour when there is competency underneath it.**

**Use this button to add this competency to another role.**
After adding more competencies, the screen will look like this

CIMA membership application

**My practical experience**
Believe where you record your practical experience against the relevant competencies. It is vitally important that you record all necessary competencies in detail and do not omit any from your submission, as it’s from this screen that you need to be able demonstrate the competencies that you have gained to be considered to become a Chartered Global Management Accountant (CGMA):

- A minimum of 36 months verified relevant experience across the 4 Knowledge areas
- At least 4 competency categories must be selected between Technical and Business Skills (min 1 from each), covering the minimum 36 months
- At least 1 competency category from both People and Leadership skills must also be demonstrated
- Of the minimum 36 months required, at least 18 months experience must be gained between the Technical and Business skills from the Intermediate, Advanced or Expert levels.
- The remaining 18 months can be gained across any of the levels within Technical and Business areas.

**Select Competency Area**

- **Technical Skills**
- **Business Skills**
- **People Skills**
- **Leadership Skills**

**My experience summary**
Please fill in the summary of experience that you have input so far. When you have roles that have overlapping competencies, please address by selecting the necessary overlap and allocating your time in that role accordingly. Once all overlaps have been established, you can then proceed to allocate a verifier on the next screen. Please do not attempt to allocate a verifier to experience that has overlapping competencies that you have not allocated your time against.

**British Telecommunications Public Limited Company**

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Competencies</th>
<th>Job Title</th>
<th>Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance Analyst</td>
<td>8</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Apportion time**

After populating your experience, you need to apportion the time of each competency as a percentage.

**Provide percentages per competency up to a maximum of 100%**

**NOTE:** Any competencies without percentages will not be counted.
Is my experience ready?

The application is now ready to start the verification process. It is advisable to go to the verification stage after your application meets the required criteria.
If your experience is not ready

My experience summary
Please find below a summary of experience that you have input so far. When you have roles that have overlapping competencies, please address by selecting the necessary overlap and allocating your time in that role accordingly. Once all overlaps have been established, you can then proceed to allocate a verifier on the next screen. Please do not attempt to allocate a verifier to experience that has overlapping competencies that you have not allocated your time against.

British Telecommunications Public Limited Company
4th May 2006 - 12th May 2015

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance Analyst</td>
<td>10</td>
</tr>
</tbody>
</table>

If the application does not meet the minimum competency requirements, the system will display what is needed. It is advisable to only proceed to the verification stage once your experience has cleared the eligibility criteria.
Verification

On the verification page you can add one or more verifiers for every role which you have provided practical experience for. There are further actions which can also be carried out after you have added your verifier.

After clicking “Add verifier”, complete the details below. It is possible to reduce the verification period if your verifier is not able to verify the entire duration. You can then add a different verifier for the remainder of the time.

Select No if you wish to reduce the verification period for a verifier.

Provide reduced verification dates.
It is advised to add an introduction message which your verifier will see on the email sent and when they login to verify your experience. Include your contact details if necessary on this message in case your verifier has any queries for you.

After adding a verifier, there are a number of actions available to you to manage the verification process.

**Further actions available**

**Cancel verification:** This action will cancel the verification request and notify your verifier that you are not required to verify the application anymore.

**Send reminder:** Allows you to send a reminder email to the verifier to remind them to verify. We will also include the login link at the bottom of any message from you.

**Edit verification period:** Allows you to edit the start date an end date of the verification period. This action is used after the verifier contacts you that you aren’t happy to verify certain dates and requests you to amend them. You will edit dates then send a reminder to the verifier to inform them to re-verify again.

**Edit verifier email:** Allows you to amend the verifier email.

**Add additional verifier:** Adds another verifier for the same selected role.
Are you sure you want to cancel?

Please note that if this verifier has already verified another role, cancelling this verification will affect the already verified roles. Please contact CIMA if you lose the verification tick against an already verified role.

Yes  No

Send reminder

Send reminder to verifier

Send an email to your verifier to remind them.

To: Michael Smith (mustta.barthwan@cimaglobal.com)

Subject: *

Message: *

Send reminder  Cancel

Edit verification period

Edit verification period

Change verification period: Intra text.

Role details

Employer: British Telecommunications Plc
Role: Finance Analyst (May 2008 - May 2016)
Verifier: Michael Smith

Verification period

From:  to:

Save  Cancel
Edit email

Add additional verifier

Adding a second verifier

Every application MUST have a minimum of 2 verifiers. After adding the first verifier, you are able to add a second verifier using the “Actions” menu.
Below is a sample of the email your verifier will receive. We will also send them verifier a separate password email.

Dear Michael Smith,

Alex Ferguson has nominated you to verify experience for their CIMA application.

Please click on the below link to verify, you will also need the password that follows in a separate email:

http://test.cimaglobal.com/portal/jsp/jsp_login.jsp?login=%20verify%20your%20app%20identifier=1-10-DF-12-08%20&applicati

Please be aware that Alex may have nominated you to verify more than one period of experience. Please contact Alex if you are unsure of what they have nominated you to verify.

Kind regards,

CIMA Membership Applications Team


This email was sent by CIMA and was intended for Michael Smith.

After your verifier has verified, you will be able to see the verifications status. The applicant will be sent an email like the one below to be notified that their verifiers have verified.

Dear Ana Luisa Jacob,

Mitala Bari has completed the verification for your application.

Please log in to your MYCIMA and navigate to your application to view the status of the verification.

Kind regards,

CIMA Membership Applications Team


This email was sent by CIMA and was intended for Mitala Bari.
Below is the status on the application after the verification is completed.

Click View to see verification status.

Report shows what your verifier was able to verify or not. You can also ask another verifier to re-verify the same experience if required.
Is my application ready?

After your application is ready, the Continue button appears to allow you to continue to the declaration and submission pages.

If your application is not ready, and does not meet the minimum competency requirements, the system will display what is needed. You will then need to add the required experience and get it re-verified.
Declaration page

CIMA membership application

Declaration

Before completing and submitting your application form you must notify CIMA of any disciplinary sanctions, or unspent convictions, you have sustained, or if you are subject to any order or undertaking relating to company directorship, bankruptcy, or any individual voluntary arrangement with creditors.

I declare that the particulars given in this application are correct and I recognise that if I gain membership but am later found to have provided untrue or misleading information in connection with the application I may be subject to disciplinary action and may be excluded from membership. I undertake, if registered, to comply with the Laws of the Institute, to uphold CIMA’s professional standards and to comply with the Code of Ethics, adopting the fundamental principles in my working life.

Please indicate whether any point of the paragraph below is applicable:

1. I have been or am currently subject to a disciplinary sanction by any professional body, employer, tribunal, or education provider.
2. I have unspent convictions.
3. I am currently subject to an order or undertaking under the Company Directors Disqualification Act 1986 or subject to any similar restriction under legislation in another jurisdiction.
4. I am currently subject to any bankruptcy restriction order or undertaking, Individual Voluntary Arrangement (IVA) involving payment of monies to creditors.

Sharing your success

When you become a member we would like to share your success by including your name in a list of new members published in national and regional publications such as Accountancy Age and Financial Management magazine. It’s a great way of showing friends, family and employers that you’ve reached a milestone in your career and are now fully qualified.

Include me on the list
Don’t include me on the list

Please note, if you are awarded Membership before 1 October, you will be liable to pay the balance of the ACMA subscription for the whole year.

Upload your current career progression summary

Please upload your current career progression summary for the purposes of assessment. You can replace your career progression summary at any time before final submission of your application. Non-relevant roles should be included in your career progression summary.

Uploading your Career Progression Summary. You will not be able to continue until this has been uploaded and declaration page completed.
Payment section

Below is the payment screen. You must pay for the application in advance. There may be outstanding debts or subscription that will also need to be paid prior to submitting your application.

Confirmation page after submission
Minimum competencies explained

<table>
<thead>
<tr>
<th>Competency Type - Technical Skills</th>
<th>Sub cat (men)</th>
<th>Sub cat (Adv)</th>
<th>Sub cat (CPD)</th>
<th>Min. no of sub categories required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Accounting and Reporting</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Professional accounting standards</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Transactional accounting and closing processes</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Financial reporting and compliance</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Cost Accounting and Management</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Cost Accounting</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Cost Management</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Business Planning</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Planning, Forecasting and Budgeting</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Capital Expenditure and Investment evaluation</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Management Reporting and Analysis</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Financial Analysis</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Management Reporting</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Performance Management</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Variance Analysis</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Benchmarking</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

Cannot be present alone means, even if you have every single competency in a type that can’t be present alone, the category won’t count until you have something else as you aren’t demonstrating the breadth required to be credited with that category.

In the example above, if you can demonstrate all competencies within Variance analysis, you will not be credited Management reporting and analysis until you can demonstrate something else in management reporting and analysis.