

Chartered Insurance Institute Standards. Professionalism. Trust.

## Membership: How to guide

How to create or reset your My CII / My PFS password

## How to create or reset your CII/PFS password

This guide explains how to create or reset your CII/PFS password. Once you have set up or reset your password you'll be able to log in to the CII/PFS website and access your Member Dashboard. You can manage your membership and exam bookings from the dashboard.

1. Begin by launching your preferred internet browser on your device.

Note: For optimal performance, we recommend using Google Chrome.



2. To access the Chartered Insurance Institute (My CII) website go to, www.ciigroup.org.

To access the Personal Finance Society (My PFS) website go to, <u>www.thepfs.org</u>

Please note: The process for reseting your password is the same for CII and PFS members. We will now show you the steps you should take to update your details on the CII website. The same steps can be followed on the PFS website.



3. Once the webpage has loaded, select 'Login' on the top right-hand sided

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	Join us Membership is open to anyone working in the insurance underwriting profession. Join us	Qualifications	MyCII (Joint Constraints) Manage your membership, including: renewals, digital membership card and CPD. Log in to MyCII				

4. To create or reset your password you will need to select the 'Forgotten password or no password' link at the bottom of the Login screen.

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	Login or Sign-up	
Forgotten password or no password.	Email or pin	Please note: Following the transition to our new Customer Management System, you will be required to validate/update your contact details and employment status once you have logged in. This should only take a few minutes.
	Remember me Forgotten password or no password	Existing member or customer? If you have an account with us please login and we'll redirect you to complete your purchase, renew your membership, or access other online services.
	Login Sign up	New to CII? If you have not registered with us before, please select the sign up button to create a new account, and we'll redirect you to complete your purchase, or access other online services.

5. You should now see the screen below. Please enter and confirm your email address and click **'Submit'**. You will receive an email with a verification link. Click the link in the email and follow the steps to set up a password.

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Forgotten your passwo	ord?				
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We will send and email to this address with your $\ensuremath{\text{PIN}}$ and a verifi	cation link back to our we	b site.			
Email address:					
Confirm email:					
Submit					

6. Once you've set up a password, log in to the website using your PIN or email and password. You should be directed to the Member Dashboard.

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Mr Lee Child 003000172K	MyCII Dashboard
Member Type: Associate level	Our new system requires you to validate/update your contact details and employment status upon login. This should only take a few minutes. Please ensure you enter your city in your address. If your membership details are not displaying, please click 'Bookings and results,' then 'My Dashboard' to display your membership. IMPORTANT: If you would like to become a member, or renew a lapsed membership, please click 'Join.'
Communication preferences	No new notifications You do not currently have any notifications to show here.
My Learning Bookings and rosults Request a learning statement Access RevisionMate Recognition of prior learning	Image: Contract of the second seco
My Membership Member status	Please select the button to access the site.

## The Member Dashboard

The Member Dashboard provides quick access to a range of key features and member-exclusive benefits. Here are some of the things you can do from the Member Dashboard:

- Update your personal details including your email and address.
- Select your communication Preferences.
- Edit your membership details including your Local Institute and Community
- View your exam bookings and results.
- Access Perks our affinity benefits scheme
- Log in to FutureMe our member exclusive learning and development platform.

Please use the links on the left hand-side of your screen to navigate the member area.

## Getting in touch with us

If you have any questions or issues regarding this process or your membership, please contact us on the details below.

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