

Schools & Colleges Policy

The CISI offers two qualifications for delivery in Schools and Colleges (S&Cs) via computer-based exams:

- [Level 2 Award in Fundamentals of Financial Services](#)
- [Level 3 Award for Introduction to Securities & Investment](#)

Teachers are responsible for delivering these qualifications to their students. The Schools & Colleges Team (schoolsandcolleges@cisi.org) will liaise directly with teachers regarding any queries or requests and will not normally correspond directly with students.

S&C's will need to register as a firm with us so that any orders processed will be invoiced directly to the school/college. Please contact the S&C Team to request this.

Pricing

S&C's are entitled to the following discounted prices for these qualifications:

Qualification	Level 2 Fundamentals of Financial Services	Level 3 Introduction to Securities & Investment
Registration, Digital Book and Revision Express	£40	£60
Exam	£60	£70
TOTAL cost per candidate	£100	£130

**The above pricing is not applicable to schools who are registered as a 'School Hub' with us. School Hubs will receive the pricing that was agreed with them.*

Teaching Resources

The current syllabus editions are as follows:

- Fundamentals of Financial Services Edition 7
- Introduction to Securities & Investment Edition 42

Teachers delivering the course can request access to study materials for themselves free of charge by emailing the S&C Team.

The teaching support resources can be found here:

- [Level 2 Fundamentals of Financial Services](#)
- [Level 3 Introduction to Securities & Investments](#)

The teaching resources provided by CISI are intended as supplementary support materials to assist with lesson planning and delivery. They should not be relied upon as the sole source of learning content. The official CISI workbook and Revision Express remain the primary learning resources for the qualification and should be used throughout programme delivery and assessment preparation.

Registering Candidates

Teachers will need to complete the '**CISI School and College Student Registrations**' Excel form (found [here](#)).

The required qualification is to be selected from the dropdown found in the yellow cell on the form.

The full name and date of birth provided for each candidate must match the details shown on their valid identification to prevent data discrepancies.

Teachers can also indicate on the form, candidates who require Reasonable Adjustment. To apply for Reasonable Adjustment, the procedure on this can be found below.

Once the registration spreadsheet has been completed, this is to be password protect and sent to schoolsandcolleges@cisi.org. The password should be sent separately in a follow-up email.

The S&C Team will register the candidates and update the registration form with the CISI candidate ID's. This completed spreadsheet will be sent back to the teacher as confirmation of registration.

Reasonable Adjustments

Teachers are to note on the registration form those who require a Reasonable Adjustment.

Candidates are to complete a [Reasonable Adjustment Application Form](#).

In addition to the application form, we require submission of supporting documents. Please see **Section 2.2** of our [Reasonable Adjustment Policy](#) for our requirements for this.

For partnered S&C's candidates, JCQ Form 8 or Form 9 would also be acceptable supporting documents provided that:

- the details are complete, and
- the person who completed the form is a SENCo for the educational institution, who is qualified and able to provide this information in line with the JCQ process.

If required, CISI reserve the right to request a copy of the original medical document for review, monitoring and verification purposes.

The teacher should submit the application along with the supporting document/s on candidate's behalf to reasonableadjustment@cisi.org and copy schoolsandcolleges@cisi.org in the email.

Reasonable Adjustment applications should be submitted at least 4-weeks before the proposed examination date. CISI cannot guarantee that requests received after this timeframe will be approved and implemented in time for the examination.

Ordering Study Materials

At the same time candidates are registered, study materials will be ordered for each candidate.

Candidates will then receive the following automated emails from the CISI:

- *New Customer Registration* – this will provide students with their customer number and details to login to their MyCISI account.
- *Digital Book Order Confirmation* – Provides a link to download the digital book as well as the PDF version.
- *Revision Express Confirmation* – Provides a link to the e-learning accessible on the candidates MyCISI account.

Booking Exam

Qualification syllabi are updated at the end of July each year. Consequently, learning objectives can be updated and added, which may result in changes to exam questions. Therefore, it is recommended that candidates sit exams in the same academic year in which they are studying towards the qualification.

Beyond this recommendation, CISI does not have any requirement for when schools/colleges need to book by, and teachers can select their own preferred date/s.

The teacher will need to complete the **'CISI School and College Exam Booking'** Excel form (found [here](#)) and send this password protected to schoolsandcolleges@cisi.org.

The required qualification is to be selected from the dropdown found in the yellow cell on the form.

If at the time of putting in a booking request a candidate indicated for reasonable adjustment has not applied or has not had their request approved, their booking will be made as a standard booking.

Centres must provide at least 4-weeks' notice of the first exam booking being made in the academic year.

Schools and colleges have the option to use one of our Surpass [Test Centres](#) or become a 'CISI Centre.'

a) Surpass Test Centres

When sending over the Excel booking form to the team, please indicate in the email which centre is preferred.

The Schools & Colleges Team will check whether the requested session is available. If it is not available, alternative dates and times may be offered.

As bookings at the centre are subject to availability, it may mean a cohort is split across various dates and times which we would generate on a random basis unless teacher requests otherwise.

Candidates under 18, are required to be accompanied by an adult to the exam. The adult is required to stay the duration of the exam in the waiting area.

Candidates need to bring valid ID in line with **Section 2** of our [Exam Regulations](#).

b) CISI Centre

Becoming a CISI Centre means a school/college is accredited to host exams in-house at their own site.

To start the accreditation process, teachers are to contact centreoperations@cisi.org who will assist.

The accreditation process can take between 8-12 weeks, therefore S&C's are encouraged to begin the process as early as possible.

For schools/colleges that are already accredited, they are to still provide at least 4 weeks' notice for any bookings so the team can advise if there are any updates or demo tests that are to be performed prior to booking any exams.

Transfer, Withdrawals and Resits

Transfers

Candidates who wish to transfer their examination need to inform their teacher who will then advise us of this.

If at least 7 days' notice is provided, the transfer will be actioned free of charge.

Where candidates are booked at one of our Surpass Test Centres but fail to attend and we are not notified by prior, the full fee will be charged.

Withdrawals

The teacher must provide at least 7 days notice prior to the exam date if they want to withdraw a candidate. A refund will be issued if this notice is met and teacher confirms candidate no longer wishes to pursue the course.

Resits

For candidates who have failed, teachers can request a resit date with at least 5 working days' notice by emailing schoolsandcolleges@cisi.org with the names of candidates who are to resit.

Candidates are eligible for 1 free exam resit. Subsequent resits will be charged at the standard S&C price.

Candidates are allowed to attempt the same exam up to 6 times in a year from the date of their first attempt.

Results

Upon exam completion, the candidate result status will be displayed onscreen. Candidates will also receive a score report to their registered email an hour to 24 hours post exam.

Teachers can request a results table of their cohort by emailing schoolsandcolleges@cisi.org. This will then be sent by the team 2 working days following exam.

Candidates who achieve a pass grade can access their PDF certificate within five working days of the examination. To access this, candidates will need to login to their MyCISI account. On the right-hand side if they hover over the 'MyCISI' tab and then click 'Account Activity & Results,' they can then click the white 'Qualifications & Assessments' tab. This will bring them to a page where all exam attempts are listed and on the right-hand side there should be a button to download certificate.

To note, the first download of a certificate will produce the original copy and so it is advisable that candidates save this. Any subsequent downloads will be marked as replacement copies.