Registered Education Provider (R.E.P.) Program

Handbook
(Version 7.3, November, 2017)

Project Management Institute
14 Campus Boulevard
Newtown Square, PA 19073-3299 USA

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Introduction

Dear Registered Education Provider:

Welcome to the Project Management Institute (PMI®) Registered Education Provider (R.E.P.) Program.

Designed to identify project management learning and products for PMI stakeholders, the R.E.P. Program has undergone considerable enhancements since its inception in mid-1999. With more than 1,500 training providers worldwide in 2017 the “PMI Registered Education Provider” name and logo is identified as the premier comprehensive continuing education program related to the field of project management.

This Handbook is designed to facilitate your active participation in this exciting, continuing education venture. The Handbook is tailored to newly approved R.E.P.s as well as existing R.E.P.s renewing their enrollment period and/or renewing their cycle period (3 years).

This document is periodically updated as the Program is refined and is enforced accordingly. If you should have any further questions concerning the PMI Registered Education Provider Program, please feel free to contact repsupport@pmi.org.

Best regards,

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E-mail: tara.leparulo@pmi.org
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A. Overview

Section I: R.E.P. Program History

Established in 1999 as a service to PMI members and stakeholders worldwide, the Registered Education Provider Program was initially envisioned as a means of identifying project management training available in the global marketplace. From less than fifty registered providers in its first year, the R.E.P. Program has grown to more than 1,500 training providers in nearly 86 countries, on six continents across the globe.

Section II: R.E.P. Program Objectives

The goals of the PMI Registered Education Provider Program are:
- To support the continuing professional development of PMI certifications, PMI members, and all stakeholders in the project management community by providing quality educational opportunities.
- To provide quality educational opportunities for PMI Certification Holders seeking to maintain their certification under the PMI Continuing Certification Requirements Program (CCR).
- To establish appropriate criteria and policies enabling PMI to provide recognition and approval of quality education providers with mature business practices aligned to PMI core values in the field of project, program and portfolio management.
- To provide a directory of current, quality, project, program, and portfolio management course offerings aligned to the PMI Talent Triangle to the project management community.

PMI R.E.P. status is awarded to only tenured, quality, financially-sound, project management education providers who are aligned to PMI core values, with mature business practices and courses aligned to the PMI Talent Triangle. Training organizations that carry the PMI R.E.P. logo are a reflection of PMI; thus, must undergo an extensive evaluation of their company and their course materials to ensure brand consistency. Please check the latest, published version of the R.E.P. Application and Agreement for program criteria/eligibility.

Section III: R.E.P. Primary Responsibilities

The latest version of the R.E.P. application on the R.E.P. Program Resources page contains R.E.P. criteria and responsibilities in detail.
# Section IV: Benefits of Enrollment in the R.E.P. Program

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Description</th>
<th>Further References</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>Permission to publicize your organization as a PMI-approved Registered Education Provider.</td>
<td>Your organization may use the “R.E.P.” term when representing itself as a PMI R.E.P. to customers, potential customers, and to the general public. Furthermore, PMI recognition of R.E.P.s is intended solely for use in conjunction with registered courses aligned to the PMI Talent Triangle being offered for PDU/contact hour credit and must not be inferred as recognition for other business activities of the R.E.P.</td>
</tr>
<tr>
<td>2</td>
<td>License to use the official PMI R.E.P. logo appropriately in promotional and course materials consistent with program policies.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Posting of your Provider Profile and other organizational information on the Education Provider Portal (CCRS).</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Posting of registered courses in the Education Provider Portal (CCRS).</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Hyperlinks to your organization from the Education Provider Portal (CCRS)</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Receipt of the “R.E.P. Monthly Update” e-Newsletter.</td>
<td>A monthly, electronic publication regarding the R.E.P. Program and PMI, sent to the primary and compliance points of contact for your organization.</td>
</tr>
<tr>
<td>7</td>
<td>Access to the PMI Marketing Portal for R.E.P.s to download/print PMI promotional materials to share with their end-customers.</td>
<td><a href="https://marketing.pmi.org/cd/login/index">https://marketing.pmi.org/cd/login/index</a></td>
</tr>
<tr>
<td>8</td>
<td>Exclusive access to Requests for Proposals (RFPs) from organizations seeking project management training.</td>
<td>The RFP Referral Program links organizations and corporations seeking project management training and development with the PMI R.E.P.s. Please note that PMI is independent of this process. PMI simply posts the RFP on the R.E.P. LinkedIn Site. To learn more about the RFP process, please visit the PMI Web site at <a href="http://www.pmi.org/learning/training-development/reps/request-group-training">http://www.pmi.org/learning/training-development/reps/request-group-training</a></td>
</tr>
<tr>
<td>9</td>
<td>Exclusive access to the R.E.P. LinkedIn Group for updated information on PMI-sponsored events, breaking news, and other timely information.</td>
<td>Please remember to check our R.E.P. LinkedIn Group under our “Jobs” section in the menu options to locate active Requests for Proposals (RFPs) from organizations globally seeking project management training delivered by R.E.P.s. If you do not have a LinkedIn account, create one now. It is free, quick, and easy. Create your account.</td>
</tr>
<tr>
<td>Page</td>
<td>Description</td>
<td>Details</td>
</tr>
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</tr>
<tr>
<td>10</td>
<td>Up to 55% discount on most PMI publications purchased through the PMI Bookstore.</td>
<td>R.E.P.s can purchase items from the PMI Bookstore making purchases online with a credit card to receive a up to a 55% discount.</td>
</tr>
<tr>
<td>11</td>
<td>Limited License to Reproduce Material</td>
<td>Contingent upon the R.E.P.s acceptance of the terms and conditions set forth in the R.E.P. Application and Agreement, PMI grants Licensee a limited use, nonexclusive, nontransferable license (the “License”) solely to reproduce 15 preselected figures and five excerpts from the most current edition of PMI's <em>A Guide to the Project Management Body of Knowledge (PMBOK® Guide)</em> and reproduce definitions from the PMBOK® Guide Glossary (in English language only) (herein called “Licensed Material”) for use and inclusion in its course offerings and pre-selected figures from Managing Change in Organizations: A Practice Guide and Change Management Practice Guide. R.E.P.s may also use PMI’s Pulse of the Profession® data in their sales materials as long as it is appropriately cited to PMI. Please refer to the Marketing Portal for figures from the <em>PMBOK®Guide</em>. The PMI R.E.P. program also offers a &quot;Premium Level&quot; IP License Option exclusive to R.E.P.s at an annual fee of US $1000. This license provides R.E.P.s the ability to reproduce a total of 75 figures and 25 excerpts from the <em>PMBOK® Guide</em> in addition to a total of 50 figures and 25 excerpts from all other PMI global standards.</td>
</tr>
<tr>
<td>12</td>
<td>Link to the PMI Home Page (<a href="http://www.pmi.org">www.pmi.org</a>).</td>
<td>R.E.P.s are permitted and encouraged to link to PMI.org.</td>
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See Page 26 of this R.E.P. Handbook for more information.
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<th></th>
<th>Indicates the enrollment year for the R.E.P. and the level of enrollment.</th>
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<td>14*</td>
<td>Opportunity to register and advertise an unlimited number of qualified courses in PMI’s Education Provider Portal, via the PMI Web site – the world’s premier Web site for project management. <a href="http://provider.pmi.org/EducationProviders/MyBatchPDUClaims.aspx">http://provider.pmi.org/EducationProviders/MyBatchPDUClaims.aspx</a></td>
</tr>
<tr>
<td>15*</td>
<td>Free registration of your organization’s first “additional office.” A US $100.00 value. Please request the Additional Offices form from <a href="mailto:REPSupport@pmi.org">REPSupport@pmi.org</a>. Please note, only Global and Charter Global Providers are permitted to list additional branch offices in the Searchable R.E.P. Provider Directory.</td>
</tr>
<tr>
<td>16*</td>
<td>Posting of your organization’s logo on your Education Provider Portal Profile.</td>
</tr>
<tr>
<td>17</td>
<td>Submitting Batch Claim PDUs. Ability to load PDUs earned on behalf of the student(s), directly to PMI for a given activity (course/event). Instructions: <a href="http://www.pmi.org/help/ccrs_provider/Content/CCRS/Provider/how_to_submit_batch_claims.htm">http://www.pmi.org/help/ccrs_provider/Content/CCRS/Provider/how_to_submit_batch_claims.htm</a></td>
</tr>
</tbody>
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* Available to Global Provider and Charter Global Provider Enrollment Levels Only

Permission to identify the organization as a “PMI Charter Registered Education Provider” or “PMI Charter Global Registered Education Provider” as long as the organization maintains consistent participation and is in good standing.
Section V: R.E.P. Enrollment Levels

All organizations participating in the R.E.P. Program must meet the R.E.P. Criteria and follow procedures as defined in Section 1 of the R.E.P. Application and Agreement. These organizations include professional training firms, academic colleges and universities, corporate training departments, government agencies, management consultant firms, professional associations and PMI Chapters.

The term "Enrollment Level" as it relates to the R.E.P. program is for administrative purposes only and is not an indication of differences in quality of R.E.P. learning activities or products, or location of those learning activities.

The R.E.P. program enrollment levels are as follows:

<table>
<thead>
<tr>
<th>Enrollment Level Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Global Provider</td>
<td>A training organization which offers a selection of project management courses to the general public. “Global Provider” R.E.P.s are permitted to register an unlimited number of courses in the R.E.P. Directory.</td>
</tr>
<tr>
<td>2 Provider</td>
<td>A training organization which offers a small selection of project management courses to the general public. “Provider” R.E.P.s are permitted to register up to three courses in the R.E.P. Directory at no additional charge. Each course registered in the R.E.P. Directory after the initial three, is an additional $150.00 U.S. annual fee.</td>
</tr>
<tr>
<td>3 Internal Training Provider</td>
<td>Internal Training Provider R.E.P.s do not offer training to the general public. They are organizations that train their own employees, such as corporations or government agencies.</td>
</tr>
</tbody>
</table>

“Charter” R.E.P. Program Participants

R.E.P.s who enrolled into the program at inception in 1999, received an opportunity to register as “Charter” R.E.P.s. The term "Charter" may only be assigned to a Provider or Global Provider enrollment level. This “charter” designation indicates that these R.E.P.s were among the original R.E.P.s who enrolled in the PMI R.E.P. Program. This designation continues to demonstrate the R.E.P.s' commitment to the development of a solid professional development infrastructure for the project management profession. The “charter” designation was offered through 1 June 2000. R.E.P.s enrolling in the program after June 1, 2000 are not entitled to receive the “charter” designation.
### Section VI: R.E.P. Periods

Upon official written notification from PMI of acceptance into the program, registration in the R.E.P. Program is conducted on an annual basis.

Each R.E.P. is assigned an Enrollment Period and a Cycle Period by PMI. These are described as follows:

| Enrollment Period | Enrollment Period is a PMI-defined, 12-month period beginning on the first day of a given calendar month and ends on the last day of a given calendar month (i.e., March 1, 2011 to February 29, 2012). The Enrollment Period is determined by PMI’s written acknowledgement to the R.E.P. applicant of their acceptance into the R.E.P. program. This PMI-written acknowledgement is sent by the R.E.P. Program Administrator to the R.E.P. Primary Administrative Contact. Acceptance into the program is based upon a successful quality review of the R.E.P. applicant’s activities (courses/events) and payment of fees. Enrollment Periods will always be the same 12 calendar months (i.e., March through February). The Enrollment Period is always defined and communicated by PMI to the R.E.P. |
| Cycle Period | Cycle Period is a PMI-defined, 36-month period (3 years) based on your Enrollment Period. Cycle Periods begin on the first day of the enrollment cycle month and ends on the last day of the enrollment cycle month. For example, based on the Enrollment Period above, the Cycle Period would be March 1, 2011 to February 28, 2014. Cycle periods are determined by the Enrollment Period and indicate notification for a quality review of activities (Courses/Events). The Cycle Period is defined and communicated by PMI to the R.E.P. Cycle Periods change after the succession of each 3-year period. |

The R.E.P. Program Administrator is the authority on Enrollment Period and Cycle Periods. Any changes to the Enrollment Period and/or Cycle Period require written approval from the R.E.P. Program Administrator.
**Section VII: R.E.P. Fee Structure**

There are two types of fees:

1. *Standard Fees:*
   - a. Application Processing Fee (New Applicants Only)
   - b. Enrollment Level Fee

2. *Optional Fees:*
   - a. Additional Office Registration Fee
   - b. Additional Activity (Course/Event) Registration Fee
   - c. Premium Level Intellectual Property (IP) Fee

<table>
<thead>
<tr>
<th>Fee Type</th>
<th>Fee Name</th>
<th>Fee Description</th>
<th>Fee Frequency</th>
<th>Non-Refundable Fee Amount (US Dollars)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard</td>
<td>Application Processing Fee</td>
<td>This application processing fee applies to all enrollment levels and is not refunded if your application is rejected. If your application is rejected, all fees are refunded with the exception of the application processing fee.</td>
<td>At the time of initially applying to the R.E.P. program</td>
<td>$ 350</td>
</tr>
<tr>
<td></td>
<td>Enrollment Level Fee</td>
<td>Global Provider</td>
<td>Annual</td>
<td>$ 2,100</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Provider</td>
<td>Annual</td>
<td>$ 1,500</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Internal Training Provider</td>
<td>Annual</td>
<td>$ 1,200</td>
</tr>
<tr>
<td>Optional</td>
<td>Additional Office/Branch Fee</td>
<td>Applies to “Global Provider” Enrollment Level only. The first additional office listing is free. The second additional office and beyond incurs this annual fee, per office/branch.</td>
<td>Annual</td>
<td>$100 per additional office/branch, per year</td>
</tr>
<tr>
<td></td>
<td>Additional Activity (Course/Event) Fee</td>
<td>Applies to “Provider” enrollment level only. The first three activities are free. The fourth activity and beyond incur this annual fee.</td>
<td>Annual</td>
<td>$150 per additional activity, per year</td>
</tr>
<tr>
<td></td>
<td>*Premium Level Intellectual Property (IP) Option</td>
<td>75 figures, 25 excerpts, all Glossary Definitions from the latest published edition of the <em>PMBOK® Guide Plus</em> 50 figures and 25 excerpts from all other PMI global standards</td>
<td>Annual</td>
<td>$1,000</td>
</tr>
</tbody>
</table>

*There is no longer a fee for additional Certificates of Enrollment. An unlimited number of certificates of enrollment may be downloaded at the [Education Provider Portal](#). Instructions on how to access and to print your certificate of enrollment can be found on the [R.E.P. Program Resource Page](#).*
Section VIII:  R.E.P. Invoicing Policy
- PMI invoices are generated in a Word format.
- PMI invoices are only available in English.
- E-mail is the only method PMI uses to invoice R.E.P.s renewing their Enrollment Period and/or Cycle Period. PMI does not mail hard copies of invoices to R.E.P.s.
- Invoices are emailed from repsupport@pmi.org to the R.E.P.s Primary Administrative Contact listed in the R.E.P. Directory.
  - To avoid PMI correspondence falling into company SPAM filters, we kindly ask the R.E.P. Primary Administrative Contact to ensure that repsupport@pmi.org is an email contact in their Microsoft Outlook or other e-mail systems.
- PMI invoices R.E.P.s approximately 60 days prior to the first day of their upcoming Enrollment Period.
- PMI will e-mail a maximum of three payment reminder notices, to the Primary Administrative Contact after the initial email containing the invoice.

Section IX:  R.E.P. Payment Terms
All payments for R.E.P.s renewing their enrollment period (as well as quality review materials required for R.E.P.s renewing their cycle period, if applicable) are due in full by the first calendar day, of the first month, of the upcoming Enrollment Period. PMI must receive full payment from your organization by the first day of your upcoming enrollment period.

PMI does not accept partial payments and does not have installment plans.

In the event PMI does not receive full payment from your organization by the first day of your upcoming enrollment period, a final payment reminder notice will be e-mailed to the R.E.P. Primary Administrative Contact. The status of the R.E.P. will remain active within the first month of the upcoming Enrollment Period, but will be considered past due.

In the event PMI does not receive full payment by the last day of the first month of the new Enrollment Period, the R.E.P. status type will automatically be changed from “Active” to “Inactive.” A termination notice will then be mailed to the Primary Administrative Contact address. Please see Termination section for more details.

R.E.P.s may not deduct any bank fees, local government fees, business obligation fees, etc. from their PMI invoice. PMI must receive the full invoice amount reflected on their PMI invoice. Bank fees, local government obligation fees, etc., are completely different and separate from the PMI invoice amount.
### Section X: R.E.P. Payment Methods
PMI only accepts the following forms of payment

<table>
<thead>
<tr>
<th><strong>Check</strong></th>
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<tbody>
<tr>
<td>▪ Payment by check must be drawn from a U.S. Bank Account</td>
</tr>
<tr>
<td>▪ Payment must be in U.S. Dollars</td>
</tr>
<tr>
<td>▪ All checks must be made payable to “Project Management Institute”</td>
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<tr>
<td>▪ Please reference your 4-digit R.E.P. number in the memo/notes section</td>
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<thead>
<tr>
<th><strong>Money Order</strong></th>
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<tbody>
<tr>
<td>Money orders may originate from non-U.S. institutions; however, the dollar amount must be in U.S. Dollars.</td>
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<tr>
<th><strong>Credit Card</strong></th>
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<tbody>
<tr>
<td>▪ Visa</td>
</tr>
<tr>
<td>Due to PCI compliance we can only accept credit card information via secure fax or the secure PMI Accellion site. Payment can also be made via phone by calling the contact phone numbers referenced on page 12.</td>
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<tr>
<th><strong>ACH/ Wire Transfer</strong></th>
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</thead>
<tbody>
<tr>
<td>▪ Please provide PMI a copy of your wire transfer receipt/confirmation</td>
</tr>
<tr>
<td>▪ Please reference your 4-digit R.E.P. number in the memo section</td>
</tr>
<tr>
<td>▪ PMI Bank Account Information to send wire transfers is as follows:</td>
</tr>
<tr>
<td>Wells Fargo</td>
</tr>
<tr>
<td>217 W. Baltimore Pike</td>
</tr>
<tr>
<td>2nd Floor</td>
</tr>
<tr>
<td>Media, Pennsylvania 19063 USA</td>
</tr>
<tr>
<td>Phone: +1-610-891-1088</td>
</tr>
<tr>
<td>Fax: +1-610-891-1065</td>
</tr>
<tr>
<td>Account Number: 2014183097209</td>
</tr>
<tr>
<td>Routing Transit Number: 121000248</td>
</tr>
<tr>
<td>Swift Code: WFBIUS6S</td>
</tr>
<tr>
<td>▪ Local government fees, business obligation fees, bank fees, etc. are the applicant’s responsibility. For example: If you are renewing your Global Provider status at $2,100 USD and your bank is charging $40 USD to send the $2,100 wire transfer to PMI, the amount that must be credited into PMI’s bank account must be $2,100, not $2,060. The amount reflected on the PMI Invoice is the amount that PMI must see in their bank account.</td>
</tr>
</tbody>
</table>
## Section XI: R.E.P. Status Types

There are two status types of R.E.P.s which are as follows:

<table>
<thead>
<tr>
<th>Status Type</th>
<th>Status Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Active</strong></td>
<td>The R.E.P. is in good standing. Payment has been received and processed, quality review was successful, all pertinent documents are currently on file with PMI, and there are no compliance issues.</td>
</tr>
<tr>
<td><strong>Inactive</strong></td>
<td>The R.E.P. is removed from the Education Provider Portal. Reasons may include but are not limited to: non-compliance, failed application, voluntary withdraw, failure to make payment, failure to provide all documents at the time of cycle renewal, violation of Intellectual Property, etc. Inactive R.E.P.s must remove all references to the PMI R.E.P. program from their marketing materials. The R.E.P. agrees that it will immediately discontinue use of R.E.P. Program and PMI logos, marks, materials and statements. This includes course materials referencing PMI Intellectual Property. The R.E.P. will not represent that it has any association or affiliation (i.e., former association, former affiliation) with the PMI R.E.P. Program. R.E.P.s understand that PMI conducts random audits to ensure compliance of the R.E.P. Program Guidelines and PMI Intellectual Property. PMI reserves the right to retire an inactive R.E.P.‘s activities in CCRS. Students of inactive R.E.P.s may not claim PDUs against activities in CCRS, if the course completion date is after the activity retired date in CCRS. PMI complies with all applicable U.S. economic sanctions, export controls, and anti-boycott laws and regulations, administered principally by the U.S. Treasury Department’s Office of Foreign Assets Control (OFAC) and the Department of Commerce’s Bureau of Industry and Security (BIS). In accordance with those laws and regulations, PMI may be prohibited from processing applications for renewing applicants from sanctioned or embargoed countries, or from persons subject to list-based sanctions. PMI will notify you if your application cannot be processed for such reasons. For more information on economic sanctions and export controls, please visit the OFAC web site at: <a href="http://www.treasury.gov/resource-center/sanctions/Programs/Pages/Programs.aspx">http://www.treasury.gov/resource-center/sanctions/Programs/Pages/Programs.aspx</a></td>
</tr>
</tbody>
</table>

The R.E.P. Program Team is the authority on R.E.P. status types and is the only authorized party to make changes between these two status types.

Reinstatement of R.E.P. status (from inactive to active) will be conducted on a case-by-case basis and the R.E.P. Program Team will determine the decision. Reinstatement of status will yield the same 4 digit provider number.

Once an R.E.P. applicant is made inactive and terminated from the R.E.P. Program, they must wait a full year from the inactive/termination date in order to reapply to the program. Reinstating R.E.P. status is not guaranteed and is handled on a case-by-case basis. Please see the Terminating Section of this Handbook for more details.
Section XII:  R.E.P. Program Support Contacts

<table>
<thead>
<tr>
<th>North America, Latin America, Caribbean and the EMEA Region (Europe, Middle East, Africa):</th>
<th>For R.E.P.s located within the Asia Pacific Region</th>
</tr>
</thead>
</table>
| Project Management Institute Global Operations Center  
ATTN: R.E.P. Processor  
Fourteen Campus Boulevard  
Newtown Square, PA 19073-3299 USA  
Secure e-Fax: +1-888-243-3712 (US Only)  
Secure e-Fax: +1-610-771-4143 (Outside the US)  
E-mail: repsupport@pmi.org  
Phone: +1-610-356-4600 | Project Management Institute Asia Pacific Service Center  
ATTN: R.E.P. Processor  
20, Bendemeer Road  
Cyberhub, #04-02  
Singapore 339914  
Secure Fax: +65 6336 2263  
E-mail: repsupport-asiapac@pmi.org  
Telephone : +65-6496-5501 |

Section XIII: Submitting Your R.E.P. Application and Supporting Documentation

Please refer to the “Checklist of Items to Submit with Your R.E.P. Application” in the R.E.P. Application and Agreement. This easy to read checklist is located in the R.E.P. Application and Agreement.

<table>
<thead>
<tr>
<th>How to submit your application</th>
</tr>
</thead>
</table>
| **STEP 1:** Have the application complete and all documents that need to be submitted ready.  
- Label each file to correspond to the section number, part number and item number (if applicable) of the application as well as the language of the file.  
For example:  
File: "Certificate of Completion" File Name: Section 2_Part A_Item5_Spanish  
File: "Complete Conference Presentation" File Name: Section 2_Part C_Item 9CF_Spanish  
File: "PMP® Exam Prep Course Materials" File Name: Section3_Activity_Description_Form_PMPPrep_English |
| **STEP 2:** Zip all files and application into one Zip file.  
-Do not zip files within a zip file. -One link will only handle 20 gigabytes. If you have more that 20 gigs of data to upload please ask for 2 links. |
| **STEP 3:** Send an e-mail to R.E.P. Support to request a link to the secure, large file upload tool, Accellion. For faster processing please use this title in your e-mail "Request PMI Accellion Link to Upload my R.E.P. Application". |
| **STEP 4:** Allow 3 business days to receive the link. |
| **STEP 5:** Once the link has been sent you must upload your files within 7 days before it expires. |
| **STEP 6:** Within 3 business days you will be sent a confirmation that your files have been received. This begins the internal review process. |

Section XIV: Requirements for Successful R.E.P. Application Processing

In order to process your R.E.P. application, PMI must receive all the required application information as referenced on the “Checklist of Items to Submit within your R.E.P. Application” in the R.E.P. Application and Agreement.

Failure to provide all the necessary documents will result in application processing delays and/or the return of your incomplete application. You will need to wait a full year to re-apply.
Please be advised that courses submitted are final. You are not permitted to rework course materials as you go through the Quality Review Process.

Section XV. Expectations for Processing Your R.E.P. Application
Please refer to the R.E.P. Application and Agreement, section entitled: “What R.E.P. Applicants can expect from PMI after Application Submission”.

PMI will make reasonable attempts to communicate via e-mail to provide status of your R.E.P. application, and/or provide an explanation of any possible missing information to process your application and/or payment.

Please remember: PMI will always communicate via e-mail from repsupport@pmi.org or repsupport-asiapac@pmi.org to only the R.E.P. Primary Administrative Contact referenced on the R.E.P. Application and Agreement. It is the responsibility of the R.E.P. to ensure the Primary Administrative Contact and the Compliance Contact are always up to date and valid.

In the event PMI does not receive a response from the R.E.P. Primary Administrative Contact regarding additional information PMI may need to process an application/payment/etc. within the specified time communicated by PMI, PMI will close your application and return it to you.

Section XVI: Quality Review Process

INTRODUCTION: Be sure to check the latest version of the R.E.P. Application and Agreement for the current R.E.P. program criteria.

The Quality Review Process begins when the R.E.P. applicant’s full payment has been received and processed by PMI and the required documentation, including an updated R.E.P. Profile (required) has been received by repsupport@pmi.org. The R.E.P. Application Processors perform a preliminary review to ensure the applicant is eligible and all documents have been received before assigning to a Quality Reviewer to begin the quality review process.

Each new R.E.P. applicant and each existing R.E.P. renewing their Cycle Period is required to submit specific documentation to PMI for a quality review. This requested documentation includes, but is not limited to, descriptions of organizational business structure, operational practices, course development procedures, and course delivery. This information is reviewed against the established six (6) quality assurance criteria as found in Section 1 of the R.E.P. Application and Agreement.

When all documents are submitted, the quality review is assigned to a Quality Reviewer. The Quality Reviewer is an independent third party, qualified by project management and training experience. Quality Reviewers are PMP®s and are not employed by an existing R.E.P.

PURPOSE: The purpose of the Quality Review is for PMI to gain insight and assess the following components of the applicant’s organization:

1. Instructional Design (Content Development)
2. Teaching Soundness (Content Delivery)
3. Sound, ethical, and mature Business Practices
4. Intellectual Property Use and Compliance

The purpose of the quality review is NOT for PMI to provide consultative services to the R.E.P. applicant, to help develop or improve in one or more of these areas. The quality review purpose is to assess the due diligence of the applicant, with respect to these areas. PMI’s expectation is the above components are mature and of high quality,
given the applicant’s intention/desire to carry the PMI R.E.P. logo. As a result, PMI assesses these four areas and then determines if the applicant is eligible to receive/sustain R.E.P. status, as it relates to program guidelines.

METHOD: Currently, the quality review process is performed remotely and is managed via e-mail and telephone between the Quality Reviewer and the R.E.P. Primary Administrative Contact. If the R.E.P. Primary Administrative Contact requires a web conferencing interactive quality review instead of the current virtual process, we can accommodate this request.

To ensure the continuing quality of the R.E.P. Program, all participants are subject to additional audits by PMI. Each year, a percentage of all enrolled R.E.P.s are chosen for an active audit based on customer feedback received by PMI, or through other selection methods.

The R.E.P. applicant agrees to accept and abide by the PMI Registered Education Provider criteria and all terms and conditions of the R.E.P. Application and Agreement. Furthermore, all R.E.P.s agree to accept sole and full responsibility for the quality assurance of any project management programs offered with respect to the R.E.P. Program, and under this agreement.

Quality Review instructions are provided in Section 2 of the R.E.P. Application and Agreement. It is important to note that Section 2 of the R.E.P. Application and Agreement correspond to the six (6) criteria referenced in Section 1 of the R.E.P. Application and Agreement. The correlation is as follows:

<table>
<thead>
<tr>
<th>Section of R.E.P. Application and Agreement</th>
<th>Part Letter</th>
<th>Item Number</th>
<th>Corresponds to Criterion Number in Section 1 of R.E.P. Application and Agreement</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>A</td>
<td>1,2,3,4,5</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>B,C,D,E</td>
<td>6,7,8,9,10</td>
<td>2</td>
</tr>
<tr>
<td>2</td>
<td>B,C,D,E</td>
<td>11, 12, 13, 14</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td>B,C,D,E</td>
<td>15</td>
<td>4</td>
</tr>
<tr>
<td>2</td>
<td>B,C,D,E</td>
<td>16,17</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>B,C,D,E</td>
<td>18</td>
<td>6</td>
</tr>
</tbody>
</table>

PMI does NOT provide a quality review on every activity (Course/Event) offered by each R.E.P. PMI reviews 1 activity (course/event) per course delivery method. A course delivery method may be a classroom course (CC), a Conference (CF), a Distance Learning Course (DL), or a Licensed Course (LC) from another R.E.P., with certain restrictions. (See R.E.P. Application). Furthermore, all activities offered by an R.E.P. must have a PMP® Review and Sign-off.

As part of the Quality Review/Active Audit process, PMI may also consider an applicant/participant’s business standing on other business media websites including the Better Business Bureau, Linked-In, Facebook, etc. for participation in the R.E.P. Program.

The quality review process has been and will continue to be an evolving continuous improvement process. Passing the quality review in one cycle period does not consistute a pass in future cycle periods. It is the responsibility of the designated Compliance Contact to be aware of updated program aids available on the R.E.P. Program Resources, communications in R.E.P. newsletters, R.E.P. Linked-In discussions, etc. and ensure ongoing compliance. Full cooperation, professionalism, and transparency is required to complete the quality review, effectively and efficiently.

R.E.P.s are encouraged to provide feedback to the R.E.P. Program team regarding their experience of the Quality Review. You may click here to share your feedback about the Quality Review.

Section XVII: R.E.P. Program Active Audit Process

INTRODUCTION: In the spirit of protecting the PMI brand and sustaining the quality and prestige of the R.E.P. Program, each year a percentage of R.E.P.s are chosen to undergo an active audit of their training organization. An active audit is performed in addition to the triennial quality review process to ensure compliance of the R.E.P. Program guidelines and policy.

PURPOSE: The purpose of the active audit/quality review is not to provide a free, consultative service to the R.E.P. organization to highlight all errors/inconsistencies relative to program criteria. Instead, it is an opportunity for PMI to evaluate compliance of the R.E.P. relative to published program criteria and guidelines. Furthermore, the active audit/quality review is an opportunity for PMI to experience the due diligence of the designated Compliance Contact within an R.E.P.’s organization. Quality Reviewer time/effort to conduct and complete the quality review/active audit is at PMI’s discretion. Per program policy, PMI expects an R.E.P. to be in compliance with program guidelines at all times. PMI reserves the right to terminate an R.E.P. at anytime for any reason related to non-compliance of the latest published version of the R.E.P. Application and Agreement and/or stated guidelines in this R.E.P. Program Handbook.

SELECTION: An R.E.P. identified for an active audit can be selected for a number of reasons, either randomly or due to a concern that is brought to the attention of the program team.

PROCESS: As illustrated in the flowchart below, if your organization is selected for an active audit, you will be notified via email by the R.E.P. Program Lead Quality Reviewer. The Lead Quality Reviewer will assign a Quality Reviewer for the audit. The Quality Reviewer may request specific items to audit. These items may include web site domains, course materials, advertising materials, internal business processes, activity listings in CCRS Directory, or any other items associated with your training practice. The selected R.E.P. must submit all requested items, within a specific timeframe. The designated Compliance Contact will be accountable for ensuring all required materials are provided in a timely manner and responses provided to the assigned Quality Reviewer. Full cooperation, professionalism, and transparency is required to complete the active audit process effectively and efficiently.

OUTCOMES: If the requested items are not submitted within the specified timeframe, the organization will be deemed non-compliant, resulting in termination from the program.

If the R.E.P.’s submission of requested items is inaccurate, misleading, or deceptive in any way, the R.E.P. status will be terminated indefinitely.

If the findings of the active audit are unacceptable according to program policy, the R.E.P. will be notified by the Lead Quality Reviewer via email and may or may not be provided 10 business days to resolve any instances of non-compliance. The severity and magnitude of any non-compliance violations uncovered, will determine the Lead Quality Reviewer or R.E.P. Program staff’s decision to provide an opportunity to correct non-compliance issues or terminate accordingly.

If the findings of the active audit are acceptable according to program policy, the R.E.P. will be notified by the Lead Quality Reviewer via email.

Findings associated with active audits will be noted in the R.E.P.s file with the R.E.P. program team/repsupport@pmi.org. These findings will be taken into consideration for assessment/evaluation purposes relative to existing/future program participation.

PMI reserves the sole and exclusive right to terminate an R.E.P.’s participation in the program at any time for any reason relative to the non-compliance and/or terms and conditions of the R.E.P. Application and Agreement and/or stated guidelines in the R.E.P. Program Handbook. Please see Section XVIII Termination for more details.
The R.E.P. Quality Review Audit Process.
This flowchart depicts the high-level process of the active audit.
PMI reserves the right to adjust this process as necessary during an audit.
Section XVIII: Termination/Rejection

A. PMI reserves the sole and exclusive right to reject any application for the PMI Registered Education Provider Program based on inability to meet required Program Criteria/eligibility and/or the receipt of a completed, outdated version of the R.E.P. Application and Agreement.

B. PMI reserves the right to terminate/close an application (new or cycle renewal) if an applicant is non-responsive, and/or if there are multiple attempts required by PMI to obtain the required documentation/information to process an application. Please note, PMI is not a repository for incomplete applications. PMI must either process a completed application or close an incomplete application. Applicants are expected to provide all the required documentation/information on their initial submission to PMI for processing. More than one attempt on behalf of PMI to obtain the required information/documentation from an incomplete application will result in a closed application. Applicant will need to wait a full year before re-applying.

C. PMI reserves the sole and exclusive right to terminate a Provider’s participation in the Program at any time for any reason relative to the R.E.P. Application and Agreement and/or stated guidelines in the R.E.P. Program Handbook.

D. Termination may result from, but not exclusive of, non-compliance of the R.E.P. Program Application and Agreement. A provider notified for non-compliance violations may or may not be granted 15 business days to resolve any non-compliance violations, depending on the severity, magnitude, and or frequency of the violation(s). If PMI grants the opportunity for resolution, failure to comply within the 15 business days will result in termination.

E. Termination may result from repeated occurrences of, or a significant number of, non-compliance violations.

F. Termination may result from refusal to make necessary/required/suggested corrections as indicated by PMI.

G. Termination may result from the severity and magnitude of non-compliance issues uncovered in the Quality Review, Active Audit, and/or compliance checks.

H. Termination may result from a lack of accountability or ownership on behalf of the designated Compliance Contact to ensure program criteria was met at all times.

I. Termination may result from activities aligned to an outdated PMI standard in CCRS. PMI members and credential holders rely on the Education Provider Portal (CCRS) to locate and secure up-to-date educational opportunities to meet their needs.

J. A first time offense in non-compliance is subject to termination based on the severity and magnitude of non-compliance uncovered, regardless of an R.E.P.’s history in good standing.

K. Termination may result from consistently using harsh language to post severely negative comments about PMI on social media that potentially denigrates the brand.

L. Termination may result from consistent complaints PMI has received from students and/or other parties about the R.E.P.’s services/business practices that may denigrate the R.E.P. program and/or PMI Brand, and are not aligned to the PMI core values and/or ethics. Complaints filed with other agencies/websites, such as the Better Business Bureau, LinkedIn, Facebook, etc. about the R.E.P. in question, may also be considered for termination.

M. Termination may result from having been removed from participating in other parts of PMI.

N. If termination is rendered, the terminated R.E.P. will remain inactive from the Program for one year, at a minimum, from the time of termination notification. The terminated R.E.P. may or may not reapply to the program subsequent to the one year, inactive period. Reinstating R.E.P. status is not guaranteed and will be handled on a case-by-case basis by the R.E.P. program team.

O. If termination is rendered, any potential refunds due to the provider/applicant as a result of termination/rejection are at the discretion of PMI. Existing program participants that are removed/terminated must remove all references to the PMI R.E.P. Program in their marketing materials including websites, business cards, etc. within 30 days from removal/termination notice. Additionally, terminated/removed program participants must apply for the required Intellectual Property License to continue using PMI IP in their course materials, as a non-R.E.P., by completing the Permissions Agreement Form. Failure to comply within the 30 days, may result in forfeiting any potential refunds and/or further legal action.

P. Depending on the severity/reason for termination, activities listed in the terminated R.E.P.’s Education Provider Portal of CCRS will be retired within a 3 month period as defined by PMI. If the terminated R.E.P. is eligible to re-apply to the program, is approved, and active status is reinstated the re-instated R.E.P. must re-
enter their activities into CCRS. PMI cannot change the status of retired activities once they have been retired. Students can still claim PDUs against a retired activity provided the student completed the course before the activity retired date and claimed the PDUs for this retired activity within their current certification cycle. Eligibility to re-apply to the R.E.P. Program is at PMI’s discretion.

Q. Termination in the program results in an immediate status change from Active to Inactive. Inactive status means:

1. Students seeking courses will no longer find your organization in the PMI CCRS directory.
2. Your students will no longer be able to claim pre-approved PDUs for activities completed after the retire date of the activity in CCRS. Activities listed in the terminated R.E.P.’s Education Provider Portal of CCRS will be retired within a 3 month period as defined by PMI. Retiring activities in CCRS is at PMI’s discretion.
3. You will need to remove all PMI and R.E.P. logo usage in marketing collateral, course materials, webpages, etc. as this is strictly prohibited.
4. You will need to complete the Permissions Agreement Form to obtain the appropriate custom agreement for any PMI Intellectual Property being used in your course materials.
5. After 30 days from your inactive date, the R.E.P. program will randomly audit the status of items 3 and 4. If non-compliance is discovered, your organization may not be eligible to apply to the program in the future. Any non-compliance activity reported, may be forwarded to PMI Legal for further action.
6. Once inactive and if eligible to re-apply, there is at least a 1 year waiting period to re-apply to the program. The cost to re-apply to the program is $350 application plus the yearly fee(s). Eligibility to re-apply is at PMI’s discretion and not a guarantee.

R. The R.E.P. Program structure including pricing, is subject to change at any time. With any such changes, PMI reserves the right in its sole discretion to discontinue the terms and conditions of an existing agreement. PMI welcomes and appreciates any feedback from terminated R.E.P.s by completing the R.E.P. Program Exit Survey.

Section XIX: Appeals Process
In the event of the occurrence of any of the above in section XVIII, the chief operational officer or other authorized representative of the R.E.P. Applicant/Provider shall have the right to appeal such an adverse PMI decision by informing PMI of the R.E.P. Applicant/Provider’s intent to appeal within thirty (30) days of receipt of PMI’s written decision.

All appeals shall be forwarded in writing to the attention of the Manager, R.E.P. Program at PMI, 14 Campus Boulevard, Newtown Square, PA 19073. The appeal letter shall: (a) clearly state the specific grounds on which the appeal is being made, and (b) include all relevant supportive documentation demonstrating why the appellant feels that the decision by PMI is in error and should be reconsidered.

Within thirty (30) days of receipt of the written appeal, the Manager, R.E.P. Program shall review the appeal and supportive documentation, and inform the appellant in writing whether or not the appeal has been approved or denied. If the appeal is approved, the appellant will be automatically accepted/reinstated into the R.E.P. program and will be sent all relevant guidelines, forms, and logos.

In the event that the appeal is denied by the Manager, R.E.P. Program, the appellant will sustain the inactive R.E.P. status as indicated in the termination notice. The decision of the Manager, R.E.P. Program at PMI shall be final and binding of the R.E.P. Applicant/Provider.
Section XX: Reporting Non-Compliant Activity

In the event an R.E.P. would like to report non-compliant activity of the R.E.P. Program, please use this link to complete the online R.E.P. Non Compliance Activity Submissions/Complaint Form. All complaints about an R.E.P. must be filed using this on-line form.

Non-compliant activity includes, but is not limited to, misuse of PMI Intellectual Property and the PMI advertising policy, as well as any activity that may denigrate the PMI brand and/or not be aligned to PMI core values and/or ethics. The R.E.P. Program Administrator will then assess the situation on a case-by-case basis and address the matter individually with the R.E.P. that is deemed to be non-compliant.

Non-R.E.P.s with non-compliance issues will be addressed by a designated Compliance Officer within the PMI Legal Department directly. All reporting of non-compliant activity to PMI is confidential.

Additionally, all outcomes of reported non-compliant activity are also confidential. PMI will not provide a status update to the originator of the complaint. Due the nature and severity of the complaint, resolution time will vary but our intent is to resolve a complaint within 20 business days from receiving the on-line submission form. Please be patient as PMI will take every step to resolve non-compliant activity if PMI deems the activity to be non-compliant.

Findings associated with PMI-deemed non-compliant activity will be noted in the R.E.P.s file with the R.E.P. program team/repsupport@pmi.org. These findings will be taken into consideration for assessment/evaluation purposes relative to program participation.

It is important to note that students of R.E.P.s, can also provide feedback directly to PMI, regarding their experience with an activity. R.E.P.s are encouraged to share this external process with their students.

Click here for more information:
How to provide feedback about a course you completed with an R.E.P.
(then click “Report PDUs for Courses and Training and scroll down to survey/evaluation question section towards the bottom)
B. Registered Education Provider Administrative Information

This section of the R.E.P. Handbook assists the R.E.P. in maintaining its enrollment in the Program. If the R.E.P. has any questions regarding the administration of its enrollment in the R.E.P. Program, it may contact the R.E.P. Program Administrator by telephone at +1-610-356-4600 ext. 1239, or by e-mail at repsupport@pmi.org

Section I: R.E.P. Program – Roles and Responsibilities of your team

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities/Abilities</th>
</tr>
</thead>
</table>
| Primary Administrative Contact* | • Distribution of Program messages to other staff members within the organization including R.E.P. Newsletter.  
                               | • Maintaining enrollment and ensuring provider profile details are up to date.  
                               | • Ensure R.E.P. Program and CCR Program Policies are sustained  
                               | • Meet all PMI R.E.P. Program team requests within requested timeframe.  
                               | • Contact information advertised on the public directory is accurate.  
                               | • Contact program team and initiate account updates  
                               | • Able to place all organization’s orders for the bookstore to receive a 50% discount on certain items.  |
| Compliance Contact*           | • The organization has and follows a clear, measurable process to ensure that all program criteria are met.  
                               | • Ensure R.E.P. program and CCR Program Policies are sustained  
                               | • For cycle renewal application and quality review/active audit requirements  
                               | • Acts as back up contact to the primary contact  
                               | • Contact program team and initiate account update |
| Additional Contacts*           | • Acts as back up contact to the primary contact  
                               | • Contact program team and initiate account update |
| Provider Representative*      | • Ensure CCRS policies are sustained  
                               | • Add an activity/edit an activity/retire an activity  
                               | • Submit a Batch PDU Claim  
                               | • Manage Provider Representatives  
                               | • Edit your Provider Description |
| Course/Activity Contact       | • Contact advertised on the public directory for a course offering. |

*These contacts can purchase select PMI-published titles from the bookstore at a 50% discount off the retail price.

Section II: PMI Marketing Portal

The PMI Marketing Portal can be found at https://marketing.pmi.org/cd/index/home. Access this link to locate PMI promotional materials that can be downloaded to serve your business and training needs. PMI has developed a press release template that will make it easy for you to announce your newly attained R.E.P. designation. Please follow the simple process described below to develop your press release:
1. Download the news release template from the PMI Marketing Portal (please follow a link on the right side of the page)
2. Insert your organization’s contact information, slogan and logo into the template
3. Send it to the PMI PR Manager for PMI’s review
4. Receive e-mail approval from the PMI PR Manager within two business days
5. Publish the news release

Section III: R.E.P. Program Resources
To better serve our stakeholders, we have created a pmi.org web page to locate all of your important R.E.P. program resources and operational documents. Please bookmark in your browser for future reference. http://www.pmi.org/rep-program-resources

Section IV: Continuing Certification Requirements System (CCRS)
CCRS is PMI’s Continuing Certification Requirements System. This system facilitates the PMI Continuing Certification Requirements (CCR) program. PMI Credential holders use CCRS to complete credential maintenance tasks. Designated Provider Representative for your organization will need to access CCRS to maintain your R.E.P. profile including CAT A PDU awarding activities.

Policy to Maintain Compliance of CCRS Activities
It is important to note, the R.E.P. Program incorporates education and training best practice guidelines. This includes continuous improvement to educational offerings overtime. As a result, supplemental readings, syllabi, teaching methods, student needs, learning outcomes, faculty, case studies, student assessments, assignments, etc. are likely to change over time. These types of changes warrant updates to your course materials periodically and furthermore, warrant updates to your activities listed in the CCRS Directory. R.E.P.s are required to keep their CCRS Directory of activities current. This will ensure practitioners and organizations searching for educational opportunities on pmi.org (via the CCRS Directory) will retrieve activity listings that are credible, relevant, and current. This ultimately promotes the value proposition of your organization, as a branded PMI R.E.P. training organization.

The R.E.P. Administrative Contact and Compliance Contact for your organization are responsible for maintaining the relevancy and accuracy of your organization’s profile and course listings in the CCRS directory. This is to ensure compliance of Criterion 5 within the R.E.P. Application and Agreement.

Activity - An activity is a learning event aligned to the PMI Talent Triangle, is entered into the Education Provider Portal (CCRS) by an education provider, reviewed and signed off by a PMP, approved by PMI to advertise, and eligible to award contact hours/pre-approved PDUs. CCRS Activities are subject to audit through the quality review process and/or active audit process as defined in this Handbook. CCRS activities have 2 statuses: Active and Retired:

Criteria for a CCRS Active Activity:
- One activity is equal to one individual learning event. One activity cannot be a “bundle” of individual activities or a “bundle” of learning events
- Has one delivery method (in-person or via computer)
- If the activity is based on a PMI standard, it must aligned to the latest published edition of that PMI Standard
- A yearly conference activity requires a new activity number each year
- An activity cannot be claimed more than once by a PMI certification holder
Criteria\textsuperscript{1} for Retiring\textsuperscript{2} a CCRS activity:

- Activity is no longer being offered
- Activity course content has changed 25% or more
- Activity is based on a previous edition of a published PMI Standard
- Activity is based on a previous PMI certification exam content outline

Activity Alignment to PMI Talent Triangle
It is not PMI’s intent to provide an extensive list of skills and prescribe those skills to a specific area of the PMI Talent Triangle. Each individual R.E.P. will determine the Talent Triangle skill set for each activity, given their competency in instructional design, course development, and course delivery. The best source to consult within an R.E.P. organization is the instructional designer.

Browse the [CCRS Provider User Guide](#) or follow the links below to each instruction set

**Manage your Provider Profile**
- [How to Become a Provider Representative](#)
- [About Your Provider Profile](#)
- [How to Access and Print your Provider Certificate](#)

**Manage your activities and activity sessions**
- [View and Search Your Activity Catalog](#)
- [Add a New Activity and Assign an Activity Reviewer](#)
- [Manage Your Activities](#)
- [Manage Activity Sessions](#)
- [How to Submit Batch PDU Claims](#)
- [Retire an Activity](#)

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\textsuperscript{1} CCRS will highlight (in red text) any activity that is 3 years or older from the activity creation date. R.E.P.s are required to take action on these red highlighted activities using the active and/or retired criteria listed above.

\textsuperscript{2} PDUs for a retired activity may still be claimed provided the student completed the activity within the last four years of their current CCR cycle.
Section V: Maintaining the R.E.P.’s Contact Information in CCRS
The CCRS Provider Profile maintains all of the R.E.P. contact information, including the name of the organization, point of contact persons, as well as additional offices, enrollment and renewal dates. The contact information is used to send communications to the R.E.P. including renewal invoices and the R.E.P. Monthly Update Newsletter.

1. How to update your R.E.P. provider profile:
The CCRS Provider Profile lists specific information that cannot be changed, such as the organization’s address and contact information. To make these changes, the R.E.P. must send a message, noting updated contact information to repsupport@pmi.org. Changes will be made by within 3 business days.

2. Changes to the R.E.P.’s Business Structure and their Relationship with PMI:
Company Name Change: If a current R.E.P. changes their company name, please e-mail the following three items to repsupport@pmi.org:
- a letter printed on the new company name letterhead addressing the matter
- a copy of the Articles of Incorporation or other official corporate registration document illustrating the new company name
- a reason for the name change.

Company Operation Separation: If a current R.E.P. removes a part of their existing operations and places this operation into a newly-formed company with a new company name, the newly-formed company must meet the R.E.P. criteria in order to obtain R.E.P. status. This includes, but is not limited to, the newly-formed company must wait a full year to be recognized as an official business doing business for a year and teaching project management training for a year. Under no circumstances will the operation with a new company name be able to carry the same R.E.P. number as the company left intact.

Mergers/Acquisitions:
Please be advised, R.E.P. status is non-transferable.
- If a current R.E.P. merges with another R.E.P., only one R.E.P. number will remain active, and will be decided on a case by case basis.
- If a non-R.E.P. acquires an R.E.P., the non-R.E.P. must apply to the R.E.P. Program and cannot retain the acquired R.E.P. number.

Multiple branches of one organization: There must be only one organization name associated with an R.E.P. in the R.E.P. Directory. The primary administrative contact of the headquarters location manages the R.E.P. designation.

Posting of the R.E.P.’s logo in the R.E.P. Directory on the PMI Web site is one of the benefits of enrollment in the R.E.P. Program as a “Global” or Charter Global Provider.” The organization’s logo should be converted to an image file and titled with the provider’s 4 digit ID Number. For example: 1234.jpg or 1234.jpeg Then, it may be uploaded by the R.E.P. on its Provider Profile page at https://provider.pmi.org/.

Section VI: Business Partnerships

1. R.E.P. Licensed Courses to non-R.E.P.s:
R.E.P.s may not license courseware containing PMI Intellectual Property to a third party using the Basic or Premium level IP license agreements in the R.E.P. Application and Agreement.
If an R.E.P. would like to advertise, sell, or market their courses, tools, software, apps and other products containing PMI Intellectual Property via a third party, a Derivative Works license must be obtained from the PMI Legal Department using the Permissions Request. This is a separate license agreement from the Basic or Premium Level License included within the R.E.P. Program. Questions about applying for permissions agreements may be sent by e-mail to permissions@pmi.org.

A non-R.E.P. can license courseware containing PMI Intellectual Property from an existing R.E.P. with a current Derivative Works License on file with the PMI Legal Department. However, the non-R.E.P. cannot affix the PMI R.E.P. logo and cannot affix the R.E.P. number on the non-R.E.P. student certificates of completion, or any other non-R.E.P. marketing materials. The R.E.P. logo and R.E.P. number are strictly for the organization identified as the active R.E.P. The PDUs granted from the non-R.E.P., in this scenario, are non approved PDUs. As a result, the non-R.E.P., in this particular example, cannot advertise/promote that a particular course offered has been approved, accredited, etc. by an existing or former PMI R.E.P.

2. R.E.P. Referrals
An R.E.P. may refer another R.E.P.’s course offerings provided the parties involved are current R.E.P.s in good standing.

A. The “referring R.E.P.” must be transparent in their advertising to the public, including marketing materials and website advertising highlighting the following:
1) the activity is developed and delivered by another R.E.P.
2) the registration/cancellation policy is clear to student

B. The “referred R.E.P.”
1) Must have the activity registered in CCRS.
2) Must award the PDUs and issue the Certificate of Completion to the student

Section VII: Book Ordering and Discount Policy
PMI® Registered Education Providers are eligible for a 55% discount off retail prices from the PMI Bookstore for most PMI published books for resale to their clients. Item eligibility restrictions apply as follows:

<table>
<thead>
<tr>
<th>Eligible for discount</th>
<th>NOT eligible for discount</th>
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<tbody>
<tr>
<td>Most PMI-published titles (PMBOK® Guide, etc.)</td>
<td>PMI logo items (clothing, accessories, etc.)</td>
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<tr>
<td>Bundled items</td>
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<td>Journal articles</td>
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<td>Conference papers</td>
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<td>Web-based self-study books</td>
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<td>PMI/ Wiley co-published titles</td>
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<td>Membership</td>
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<tr>
<td>Other items at PMI’s discretion</td>
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</tbody>
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Policy
1. Prices are subject to change without notice. Discounts are subject to change or cancellation without notice. PMI will discount based on the list price of the item the day your order is received.
2. All orders must be placed by any R.E.P. Contact listed in CCRS, to receive the 50% discount.
3. Books that are currently in print are returnable for credit up to one year from the invoice date (no refunds unless damaged or defective). Out-of-print titles are returnable for credit at the item’s original purchase price for a period of six months after item has gone out of print.
4. A 10% restocking fee of the retail price will apply for returned books. This restocking fee will be deducted from the credit memo when 50% or more of the original quantity ordered is returned.

How to order
For orders placed via the internet - Order from PMI® Store (credit cards payments only)
a. Any R.E.P. Contact listed in CCRS is authorized (within the R.E.P.) to receive the eligible 50% discount for PMI Bookstore orders placed via the internet. The contact must be logged into PMI.org using their user ID and Password. For help with PMI.org login contact customercare@pmi.org. For help adding a R.E.P. Contact person to a pmi.org account/R.E.P. ID please contact repsupport@pmi.org.

b. Make sure to check the box “I am purchasing as a PMI Registered Education Provider (R.E.P.)” for the 50% discount to apply to the eligible items in your shopping cart.

Section VIII: Guidelines for Use of PMI Intellectual Property

1. R.E.P. Logo

The latest version of the R.E.P. logo along with R.E.P. logo usage guidelines may be found on the Marketing Portal.

The R.E.P. Logo is licensed on a non-exclusive, non-transferable basis by PMI to members of the R.E.P. Program as a program benefit for R.E.P.s to use pursuant to the terms and conditions herein. The terms of this license to use the R.E.P. Logo may be modified from time to time at PMI's sole discretion.

The R.E.P. Logo must be displayed in such a way that it is clearly linked to the name of the R.E.P. and may only be used in conjunction with R.E.P.’s registered courses or educational products.

The R.E.P. Logo may only be used in a manner to indicate R.E.P.’s enrollment in the R.E.P. Program and not in a manner which expresses or implies that PMI has accredited, certified, sponsored, endorsed, guaranteed or approved the quality of any of a R.E.P.’s specific products, courses, publications, or services. In addition, the R.E.P. logo may not be placed directly next to any PDU eligible non-PMI certification classes to avoid any perceived sponsorship, endorsement, or affiliation with PMI. For example, if an R.E.P. offers their own certificate in project management or their own certification in Project Management, this R.E.P. may not affix the PMI R.E.P. logo directly in conjunction with this R.E.P. certificate or R.E.P. certification.

If the R.E.P. Logo is placed on a R.E.P.’s products, courses, publications, or materials describing its services, a statement must be used: “Provider is a member of PMI’s R.E.P. Program and PMI does not specifically endorse, approve, or warrant R.E.P.’s products, courses, publications, or services.”

The R.E.P. Logo may not be used by the R.E.P. in a manner where it is stated or implied (by affirmative words or by specific placement of the R.E.P. Logo) that the R.E.P.’s partners, subcontractors, licensees of the R.E.P.s, or any other third party, are also an R.E.P. When using the R.E.P. Logo, the R.E.P. must use the name under which it is registered as an R.E.P.

Providers must immediately cease all use of the R.E.P. Logo upon the expiration or termination of their R.E.P. Agreement with PMI and must immediately remove the R.E.P. Logo from its website and cease distribution of any course materials, marketing materials and advertisements containing the R.E.P. Logo. Please refer to the Logo Usage Guidelines that were provided with your registration package for information regarding technical specifications and specific placement of the R.E.P. Logo on your website, products and marketing and advertising materials.

2. PMI Logo

Permission to display the PMI corporate logo will only be granted for use with an active link to the PMI homepage from the R.E.P.’s homepage. Otherwise, PMI does not permit use of its corporate logo on any non-PMI printed materials, web sites, business cards, or publications.
3. **The PMI Talent Triangle™**

PMI has granted the R.E.P. community permission to use the PMI Talent Triangle™ graphic as part of the Basic Level Intellectual Property (IP) License within the R.E.P. Application and Agreement. R.E.P.s may use the graphic on their website and promotional materials to show R.E.P.’s course alignment to skills defined in the PMI Talent Triangle™. As a friendly reminder, when placed on a website, the graphic must link to the following URL: http://www.pmi.org/certification/ccr-updates/know-the-details.aspx. The graphic must not appear less than two (2) inches in width and must include the appropriate TM attribution statement & meet usage guidelines. Please note, the PMI Talent Triangle™ Guidelines and graphic can be found in the PMI Marketing Portal.

4. **PMI Trademarks**

The purpose of a trademark is to permit a trademark owner to differentiate its products, goods or services from those of others; trademarks also serve to help consumers in identifying the source of a product, good, or service. A valid mark may be registered for an owner to use exclusively in conjunction with the owner’s product, good, service, or in the case of PMP® and CAPM®, a certification program. The unauthorized use of a mark in a confusingly similar manner constitutes trademark infringement. However, third parties can use a trademark without specific authorization from the owner to refer to the trademark owner’s products or services, so long as proper attribution to the mark and owner are given and there is no confusion as to the source of the good, product or service associated with the mark.

Representative [List of PMI Marks](#)

These marks must also be accompanied by the following statement:

“(MARK) is a (TYPE OF MARK) of the Project Management Institute, Inc.”

Example: “PMBOK is a registered trademark of the Project Management Institute, Inc.”

Please be advised that it is a requirement for all renewing R.E.P.s and new R.E.P. applicants to review the [PMI Intellectual Property (IP) – Quick Reference Guide](#).

In addition, please refer to the general Frequently Asked Questions regarding PMI Intellectual Property on the [Program Resources Page for PMI Registered Education Providers](#).

The latest version of the R.E.P. Application and Agreement now contains a check box with the statement “I attest that I have reviewed the PMI Intellectual Property – Quick Reference Guide for R.E.P.s and my organization's course materials and website are in compliance.” (See referenced page of the R.E.P. Application and Agreement for more details)

5. **Infringement**

R.E.P. shall promptly notify PMI of any infringement or unauthorized use of the PMI Licensed Material by a third party, any claim that the PMI Licensed Material infringes upon the intellectual property rights of a third party, or any act of unfair competition by third parties relating to the PMI Licensed Material, whenever R.E.P. becomes aware of such an act or claim.

R.E.P. shall cooperate with PMI at PMI's expense to prevent and stop such infringement or act and, if so requested by PMI, shall join with PMI as a party to any legal case or action brought by PMI for such purpose. PMI shall have full control over any such case or action, including, without limitation, the right to choose if, when, and where to initiate any case or action, and to select counsel or to settle on any terms PMI deems advisable. PMI shall bear all expenses connected with such legal case or action, except that if R.E.P. wishes to retain its own legal counsel, R.E.P. shall do so at their sole expense.

R.E.P.s are required to have the necessary permissions/IP rights from third party sources to use the third party IP in the R.E.P.’s courseware. Additionally, it is the R.E.P.’s responsibility to know and cite the original source of content. To better understand paraphrasing please see IP FAQs on the Resources Page under Section A, Item 2.
6. PMI Advertising Policy
R.E.P.s must be compliant with the latest PMI Advertising Policy. PMI shall reserve the sole and exclusive right to terminate a Provider’s participation in the Program if it has been determined that a Provider has acted contrary to PMI’s advertising policy terms and conditions.

A. Marketing Exam Pass Rates

Please refer to Page 2 in the PMI Advertising Policy as to how R.E.P.s are required to substantiate their claims regarding guarantees or warranties.

B. R.E.P. Program Designation
The R.E.P. Program Designation is non-transferable under any circumstances.

Section IX: Downgrading levels of service within the R.E.P. Program
Downgrading a level of service within the R.E.P. Program may be honored only at the time of an R.E.P. enrollment period renewal or cycle period renewal. Refunds for downgrading will not be issued.

1. Enrollment Level
If an R.E.P. wishes to downgrade their Enrollment Level (from Global Provider to Provider, for example), the R.E.P. needs to note this change on their invoice at the time of their enrollment period renewal or cycle period renewal.

2. Intellectual Property (IP) License Agreement
If an R.E.P. wishes to downgrade their IP Level, (from Premium Level to Basic Level, for example), the R.E.P. needs to note this change on their invoice at the time of their enrollment period or cycle period renewal. The R.E.P. must also tell the R.E.P. Program the reason for this downgrade. If choosing this downgrade you will be subject to a Quality Review Audit.

Section X: Recommended Etiquette for PMI R.E.P. Linked-In Group Participation
PMI’s R.E.P. Linked-In Group is a place for employees (not contractors) of R.E.P.s in good standing to have candid, yet respectful conversations. Please maintain the utmost courtesy and professionalism at all times when interacting within the group’s discussion forums and with other members. In addition to the Linked-In User Agreement, participants of the PMI R.E.P. Linked-In group agree to the following:

- Opinions and feedback, both positive and negative, are welcomed but we expect all postings by Group members to maintain a professional tone and context.
- Do not post, e-mail, upload, transmit or otherwise make available any content that is unlawful, harmful, threatening, abusive, harassing, tortious, defamatory, vulgar, obscene, libelous, invasive of another's privacy, hateful, or racially, ethnically or otherwise objectionable;
- Do not impersonate any person or entity;
- Do not post, e-mail, upload, transmit or otherwise make available any content that harms minors in any way;
- Do not forge headers or otherwise manipulate identifiers in order to disguise the origin of any User Content transmitted through the Site;
- Do not post, e-mail, upload, transmit or otherwise make available any content that you do not have a right to make available under any law or under contractual or fiduciary relationships (such as inside information, proprietary and confidential information learned or disclosed as part of employment relationships or under nondisclosure agreements);
- Do not post, e-mail, upload, transmit or otherwise make available any content that infringes the intellectual property rights of any party;
- Do not post, e-mail, upload, transmit or otherwise make available any content comprising any unsolicited or unauthorized advertising, promotional materials, "junk mail," "spam," "chain letters," "pyramid schemes," or any other form of commercial solicitation;
- Do not post, e-mail, upload, transmit or otherwise make available any content comprising any material that contains software viruses or any other computer code, files or programs designed to interrupt, destroy or limit the functionality of any computer software or hardware or telecommunications equipment;
- Do not disrupt the normal flow of dialogue, cause a screen to "scroll" faster than other users of the Site are able to type, or otherwise act in a manner that negatively affects other users' ability to engage in real-time exchanges;
- Do not interfere with or disrupt the Site or servers or networks connected to the Site, or disobey any requirements, procedures, policies or regulations of networks connected to the Site;
- Do not intentionally or unintentionally violate any applicable local, state, national or international law;
- Do not provide material support or resources (or to conceal or disguise the nature, location, source, or ownership of material support or resources) to any organization(s) designated by the United States government as a foreign terrorist organization pursuant to section 219 of the Immigration and Nationality Act;
- Do not "stalk" or otherwise harass any person;
- Do not collect or store personal data about other users; or,
- Do not advertise or solicit anyone to buy or sell products or to make donations of any kind absent prior written approval from PMI, as set forth in more detail in Section 6 below.

Given the PMI R.E.P. Linked-In Group is owned, managed, and governed by PMI, PMI has the right to delete postings that violate or are deemed inconsistent or inappropriate to the above-referenced guidelines. The PMI R.E.P. Linked In Group is intended to be, primarily, a community space for sharing information about industry trends, changes to PMI offerings, new business opportunities, constructive feedback about how to improve the R.E.P. program, etc. The PMI R.E.P. Linked In Group should not be used as a space for adjudicating complaints, denigrating the Institute or its offerings, etc. Please consult the appropriate PMI staff and/or engage the R.E.P. Advisory Group accordingly.