



CertBALM® – Frequently Asked Questions

What happens once I have booked my place on the CertBALM®

Once you have booked your place, you/your company will receive an invoice from ALMA. Your place on the course will not be confirmed until the invoice has been paid in full and, if it is not paid prior to the start date of the course, you will not be given access to the Learning Materials. Once you have paid for the course, you will receive an email from the ACT **on the day the course starts** giving you all the details you require, together with your login details for the ACT Learning study site. At that point, you can access the study materials.

What is the ACT learning study site?

This is the ACT's learning platform. All the CertBALM® learning materials, Unit 1 Progress Test, past papers and forums are hosted by the ACT on this learning platform. The ACT also accredits the CertBALM® qualification.

Is the Unit 1 Progress Test invigilated?

The Progress Test is not invigilated. It takes the form of a 90-minute, 75 question, multiple choice test. This can be taken at any point during the window allowed for the test and can be done as many times as is needed in order to pass. You need to obtain a result of 70% or more to pass. The mark does not count towards your final grade.

Will I get the answers to the Unit 1 Progress Test?

The answers to the Progress Test will be made available on the study site after the window for taking the test has closed and will be available for one month from the date it was made available. You can download this document and keep it as reference should you wish to refer back to it after it has been removed.

When do I obtain access to the learning materials for Units 2 – 5?

At the start of the CertBALM® you will only receive access to the Unit 1 material via the study site. You will automatically gain access to the remainder of the Units (2 – 5) on successful completion of the Unit 1 Progress Test via the study site.

How do I obtain help if I don't understand the learning materials?

ALMA has set up the "Ask the Mentor" service which is available to all students. Under each Unit the email address for this service is under "Support". The email address is: askthementor@ukalma.org.uk and you can direct a specific question about a specific Unit to one of ALMA's mentors. These queries will be answered within 72 hours. There is also a dedicated forum you can use to talk to your fellow students and ask questions. Please join the Workspace to access this.



Do I need to attend the Residential School and Revision Days?

The **March** course has a four day face-to-face Residential School which is an important part of the CertBALM® qualification and it is beneficial for all students to attend. The first two days of the school give students the chance to revise Units 2 and 3, whilst the two final days are given over to the teaching of Units 4 and 5. It is a vital part of the course. It not only gives students the chance to meet others on the course but is also an opportunity to be taught by specialist tutors and practitioners. Face to face tuition is difficult to replicate so it really is a great opportunity to ask questions, gain further understanding of the topics and practice exam questions under guidance.

The **September** course is run fully online and there will be two full days of online revision prior to the Unit 2/3 exam and a further two full days of revision prior to the Unit 4/5 exam. We recommend that students take leave from work in order to attend these revision sessions in their entirety.

How do I book the accommodation for the face-to-face Residential?

On the first day of the CertBALM® course, you will receive a welcome email from the ACT. This will include detailed instructions on how to book the accommodation directly with the Residential venue.

What do I need to know to prepare to take my online assessment?

Take a look at the Assessment – need to know page here:

<https://academy.treasurers.org/assessment/need-to-know>

How do I book my Assessments?

There are three Assessments in total – the Unit 2/3 exam, the Unit 4/5 exam and the Case Study. Each of these Assessments is hosted online by the ACT and need to be booked online. The latest assessment fees are available [here](#). The cost is paid directly to the ACT. You can also access this page via the study site; there is a button which says, “Book Assessment”.

Do I have to book to sit an Assessment?

Yes, you will need to complete an online assessment booking form via the ACT website and pay the fee directly to the ACT.

Can I defer an exam?

In exceptional circumstances, it is possible to defer an exam but it is not recommended. If you do defer, you will need to pay the assessment fee again when you re-sit.



Are there past exam papers I can look at?

Past exam papers are available to you on the study site. When you login to the site, click on the Assessment section where you will find both PDFs and online papers available.

How long do I have to wait for my results?

The ACT will send you an email letting you know your results are available. This is five or six weeks from when you sat the assessment or uploaded your Case Study. The result dates are also detailed on the ALMA website, together with all the exam dates, under the CertBALM® section.

What happens if I fail one part of the CertBALM®? Do I need to re-sit the entire qualification?

If you fail one or more parts of the CertBALM®, you only need to re-take the parts which you fail. This can be done in a further six months' time, when the next exams take place, and ALMA will let you know dates well in advance. Again, exam dates can be found on the ALMA website.

CertBALM® Case Study

The CertBALM® Case Study is the final part of the CertBALM® course and is a 7,500 word document to prove application of learning and to show you fully understand the Treasury/Balance sheet management process in the context of the bank's business model. There are five questions in total and the answers must be written in the context of a chosen organisation which must NOT be the organisation you work for.

Can I use AI to write or proofread my CertBALM® Case Study?

You cannot use generative AI (such as Chat GPT, CoPilot, Grammarly etc.) to write, edit or proofread your Case Study. Using content written or amended by AI is plagiarism and is a breach of the ACT's plagiarism and collusion policy. The ACT has software that can detect AI generated or altered content. Use of AI could lead to disqualification.

I am worried about being accused of plagiarism. What should I do?

Plagiarism checks are an important part of the process that ensures the integrity of the assessment. Writing any form of assessment can be a nerve-wracking experience. Here's some things you can do to make ease your worries about plagiarism:

- Make sure that you are familiar with the ACT's Plagiarism and Collusion Policy. <https://learning.treasurers.org/assessment/policies>
- Make sure that you correctly and clearly reference any third-party material that you have used in your assignment, whether you have cited or paraphrased. We recommend using Harvard referencing. By clearly referencing within your work the markers can see what is your own work and where you have cited others and award marks appropriately.
- Keep a record of your previous drafted versions, these may be requested as evidence.



How long do I have to complete the CertBALM®?

You have four years, from the start date of your course, to complete the CertBALM® in its entirety. If, after this time, you have failed to complete part or all of the course, you will need to start (and pay for) the qualification again from the beginning and in its entirety. In addition, for each part of the CertBALM® (i.e. the Unit 2/3 exam, the Unit 4/5 exam and the Case Study) you may only attempt each of these a maximum of four times within the four year period.