




USER MANUAL

MODULE: CONSULTANT MANAGEMENT (RENEWAL)

GROUP: CONSULTANT


AGENCY NAME	:	FEDERATION OF INVESTMENT MANAGERS MALAYSIA (FIMM)
DOCUMENT DATE	:	24/04/2025
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DOCUMENT DESCRIPTION


This document is prepared to explain how to use the FCS system. This user manual explains the functions and step by step how to use the system completely to the users involved.

Document Information	
Project Name	SUPPLY, DESIGN, DEVELOPMENT, INSTALLATION, TESTING, COMMISSIONING AND MAINTENANCE OF REGISTRATION SOFTWARE FOR FEDERATION OF INVESTMENT MANAGERS MALAYSIA (FIMM)
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DOCUMENT CONTROL

Version History			
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1.1	08/04/2025	Updated Document	Johari Amzat
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ACRONYM

ACRONYM	DESCRIPTION
CAS	Consultant Alert
CEILLI	Certificate Examination in Investment-Linked Life Insurance


Table 1: Acronym Table

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ABBREVIATIONS ROLE

Abbreviation	Role	Descriptions
SYS	SYSTEM	System generated transactions
C-CLRK	Consultant Applicant	Consultant applicant during first account creation
C-CON	Consultant	Consultant role after becoming a consultant either active or in-active
C-APP	Consultant Applicant	Consultant applicant once submitted the application to distributor

Table 2: Abbreviation Role Table

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CHAPTER I: INTRODUCTION

The **FCS System User Manual** is designed to provide users with a comprehensive guide to effectively utilizing the **FCS system**. This manual serves as a reference document to help users understand the system's functionalities, features, and processes to ensure smooth operation and efficient task completion.

By following the instructions in this manual, users will be able to navigate the system with ease, perform necessary actions, and troubleshooting common issues. The manual is structured to accommodate both new and existing users, offering clear step-by-step guidance for system access and usage.

Purpose

The purpose of this manual is to equip users with the essential knowledge required to maximize the benefits of the **FCS system**. It provides:

- **A detailed overview of the system's functions and capabilities** to help users understand its key features.
- **Step-by-step instructions** on accessing and operating the system efficiently.
- **Guidelines on alternative modes of operation and contingencies** in case of system issues or errors.
- **Best practices and recommendations** for optimal system use.

This manual ensures that users can confidently navigate the system while maintaining security, accuracy, and efficiency in their tasks.


Contact Information

If users require further assistance or encounter any issues while using the **FCS system**, they can contact the **Federation of Investment Managers Malaysia (FIMM)** for support.

Support Contact Details:

 **Email:** itsupport@fimm.com.my

 **Website:** <https://www.fimm.com.my>

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CHAPTER II: GENERAL INSTRUCTION TO USE THIS MANUAL

Reminder: Please read this section for a better understanding of the user manual.

There are **three different categories** in the Consultant Module:


No	Type of consultant	Steps	Required Documents														
1	Never registered with FIMM or inactive before April 2022 ¹ (Group A)	<div>Registration</div> <div><div><div>1. Liaise with your preferred distributor before registering in the FCS.</div><div>2. Register as a New Consultant by following Chapter III, Section F in this document.</div><div>3. Once you submitted your application, your preferred distributor will do their review and approval process. Any inquiry please liaise with them.</div><div>4. Once approved, you will receive confirmation email for Examination date as stated in Chapter III, Section F, Item 38 – Examination.</div><div>5. Should you fail your exam and you have a valid proof/ reason, you may choose to Appeal your exam result as stated in Chapter III, Section O – Appeal Exam Result²</div><div>6. Should you unable to sit for your exam and you have a valid proof/ reason, you may choose to Appeal your exam fee waiver as stated in Chapter III, Section P – Appeal Exam Fee Waiver³</div><div>7. Once you have become FIMM Active consultant and intend to vary your license, please follow Chapter III, Section U – Variation of Registration</div></div><div>Section for Group A:</div><table><tr><th>Chapter</th><th>Section</th><th>Item</th></tr><tr><td>III</td><td>F</td><td>Registration</td></tr><tr><td>III</td><td>F (Item 38)</td><td>Examination</td></tr><tr><td>III</td><td>O</td><td>Appeal for Exam Result</td></tr><tr><td>III</td><td>P</td><td>Appeal for Exam Fee Waiver</td></tr></table></div> <div><div>1. Coloured passport photo (follow the Registration Manual's resolution guidelines).</div><div>2. Coloured NRIC / Active Passport (front & back).</div><div>3. Relevant supporting documents, e.g., SPM, Diploma, etc.</div></div>	Chapter	Section	Item	III	F	Registration	III	F (Item 38)	Examination	III	O	Appeal for Exam Result	III	P	Appeal for Exam Fee Waiver
Chapter	Section	Item															
III	F	Registration															
III	F (Item 38)	Examination															
III	O	Appeal for Exam Result															
III	P	Appeal for Exam Fee Waiver															
2	Inactive consultants (from April 2022 onwards) ⁴ (Group B)	<div>1. Account Activation</div> <div><div><div>1. Liaise with your preferred distributor before registering in the FCS.</div><div>2. Activate your account by following Chapter III, Section A.</div><div>3. If you need to change your registered email, follow Chapter III, Section B.</div></div><div>2. Registration</div></div> <div>1. Coloured passport photo (follow the Registration Manual's resolution guidelines).</div>															

¹ All inactive consultants before April-2022 are considered as new applicant.

² Subject to distributor and FIMM approval. Additional costs may apply.

³ Subject to distributor and FIMM approval. Additional costs may apply.

⁴ All inactive consultants before April-2022 are considered as new applicant.


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		<ol style="list-style-type: none">1. Liaise with your preferred distributor before registering in the FCS.2. Register as a New Consultant by following Chapter III, Section F in this document.3. Once you submitted your application, your preferred distributor will do their review and approval process. Any inquiry please liaise with them.4. Once you have become FIMM Active consultant and intend to vary your license, please follow Chapter III, Section U – Variation of Registration <p>Section for Group B:</p> <table><tr><th>Chapter</th><th>Section</th><th>Item</th></tr><tr><td>III</td><td>A</td><td>Account Activation</td></tr><tr><td>III</td><td>F</td><td>Registration</td></tr><tr><td>III</td><td>U</td><td>Variation of Registration</td></tr><tr><td>III</td><td>V</td><td>CPD submission</td></tr></table>	Chapter	Section	Item	III	A	Account Activation	III	F	Registration	III	U	Variation of Registration	III	V	CPD submission	<ol style="list-style-type: none">1. Coloured passport photo (follow the resolution guidelines provided).2. Coloured NRIC / Active Passport (front & back).3. Relevant supporting documents, e.g., SPM, Diploma, etc.
Chapter	Section	Item																
III	A	Account Activation																
III	F	Registration																
III	U	Variation of Registration																
III	V	CPD submission																
3	Active consultants (Group C)	<ol style="list-style-type: none">1. Account Activation<ol style="list-style-type: none">1. Activate your account by following Chapter III, Section A.2. If you need to change your registered email, follow Chapter III, Section B.3. Once logged in, update your profile details as per Chapter III, Section D.4. If intend to vary your license, please follow Chapter III, Section U – Variation of Registration5. For CPD submission follow Chapter III, Section V – CPD Submission6. For Renewal declaration follow Chapter III, Section W – Renewal <p>Section for Group C:</p> <table><tr><th>Chapter</th><th>Section</th><th>Item</th></tr><tr><td>III</td><td>A</td><td>Account Activation</td></tr><tr><td>III</td><td>R</td><td>Profile Maintenance</td></tr><tr><td>III</td><td>U</td><td>Variation of Registration</td></tr><tr><td>III</td><td>V</td><td>CPD submission</td></tr></table>	Chapter	Section	Item	III	A	Account Activation	III	R	Profile Maintenance	III	U	Variation of Registration	III	V	CPD submission	<ol style="list-style-type: none">1. Coloured passport photo (follow the resolution guidelines provided).2. Colour NRIC/ Active Passport (front & back)3. Relevant supporting documents.
Chapter	Section	Item																
III	A	Account Activation																
III	R	Profile Maintenance																
III	U	Variation of Registration																
III	V	CPD submission																

The Consultant Management Module is responsible for handling the registration, profile maintenance, compliance, and operational processes for consultants within the FIMM Registration System. This module ensures that consultants meet regulatory requirements, maintain compliance, and manage their professional status efficiently.

Sub-Modules of the Consultant Management Module:

1. **First Time Login** – Guides for Group B & C in setting up their accounts.
2. **Registration** – Facilitates the registration of new consultants (Group A), including identity verification and document submission.
3. **Appeal for Exam Result** – Provides a process for consultants to appeal their examination results.

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4. **Appeal for Fee Waiver** – Enables consultants to request a waiver for specific fees.
5. **Profile Maintenance** – Enables consultants to manage and update their personal and professional details.
6. **Variation of Registration** – Allows consultants to modify their registration details or update their associated distributor.
7. **CPD** – Consultant to attend training and obtain CPD points for their Renewal and Re-registration.
8. **Renewal** – Manages the annual renewal process for consultants, including compliance checks.
9. **Appeal for Revocation** – Facilitates the appeal process for consultants whose registrations have been revoked.
10. **Forget Password** – Provides a password recovery process for consultants.

System access

The FCS system application is accessible only to registered users. Each user must use a unique User ID and password to log in securely. To access the system, users must navigate to the **main login page** (<https://fcs.fimm.com.my>) and enter their credentials.

Users from **Group A** will need to create a new account from the main login page (Chapter III, Section F Registration). Users from **Group B and C** will be required to activate their account (Chapter III, Section A Account Activation).

For security reasons:

1. Users should keep their login credentials confidential.
2. Passwords should be changed periodically to enhance security.
3. In case of forgotten credentials, users can use the **"Forgot Password?"** option to reset their password.

Steps to Open the FCS System Website:

1. **Launch your web browser** (Google Chrome, Mozilla Firefox, Microsoft Edge, etc.)
2. **Enter the FCS System URL** in the address bar and press **Enter**.

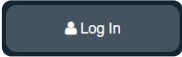
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3. The **login page** will appear, allowing users to enter their credentials.
4. For consultant please login using NRIC (without “ - “) / Active Passport

Log in

Access the Login Page

For those in **Group B & C (Existing Consultant)** and have activated their account please login as define in this section. If you have not activate your account, please do so by following the instructions provided in **Section A – First Time Login** (For Existing Consultant – active and inactive status).

1. For **Group A**, please follow provide guidelines as outline in this section.
 - a. On the homepage, locate the ‘Log in’  button and click it.
 - b. In the **User ID** field, enter your registered **NRIC / Active Passport number without “ - “**.
 - c. In the **Password** field, enter your **password**.

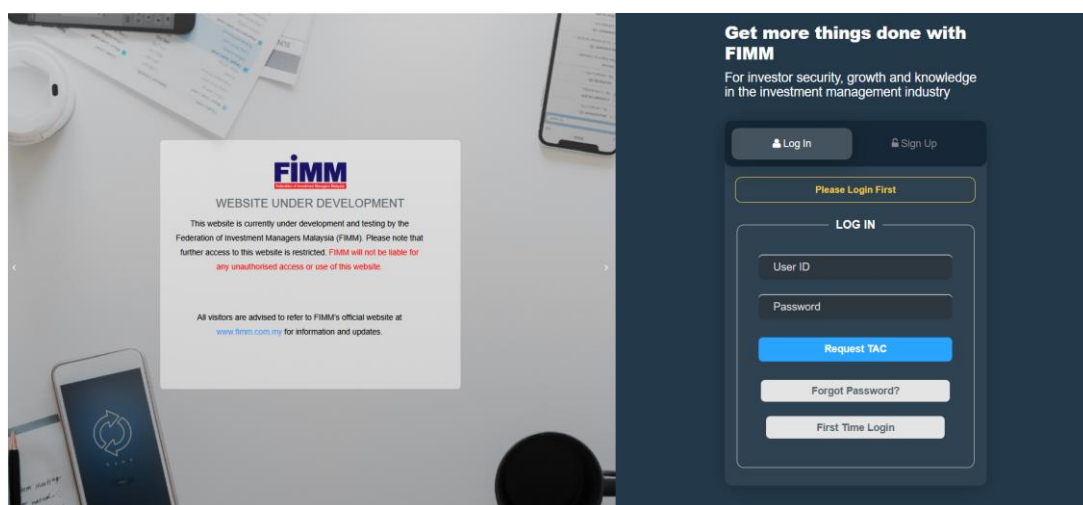



Figure 1: FCS Homepage Display

2. Enter Your Credentials

- a. System will show sign in page; User need to insert these items:
 - i. User ID
 - ii. Password
 - iii. TAC (for 2FA)

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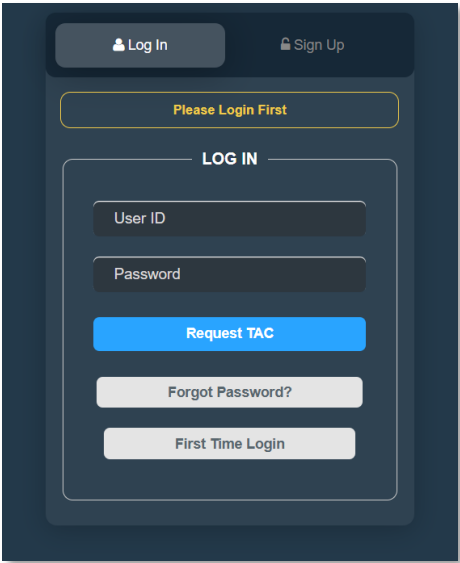


Figure 2: Log in Display

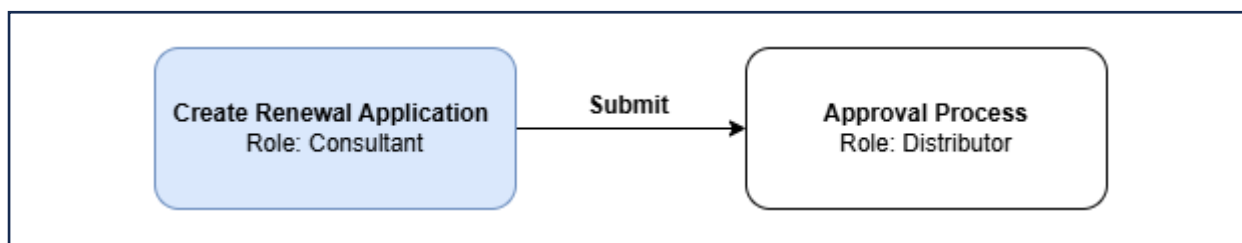
3. Successful Login

- a. Click  button to login to the system.

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Renewal

This section explains regarding the submission by consultant (Group C only) for renewal declaration.



1. Click Profile Management under the Consultant submenu.

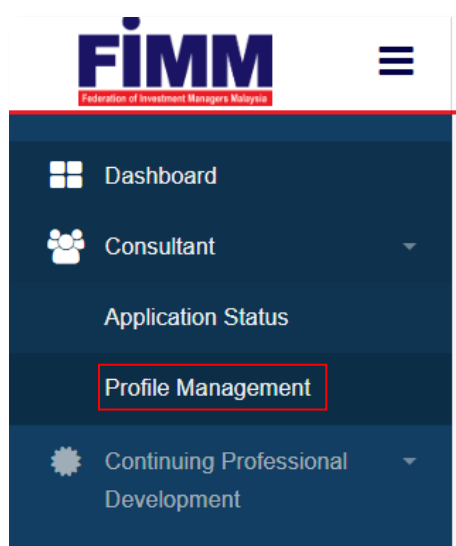

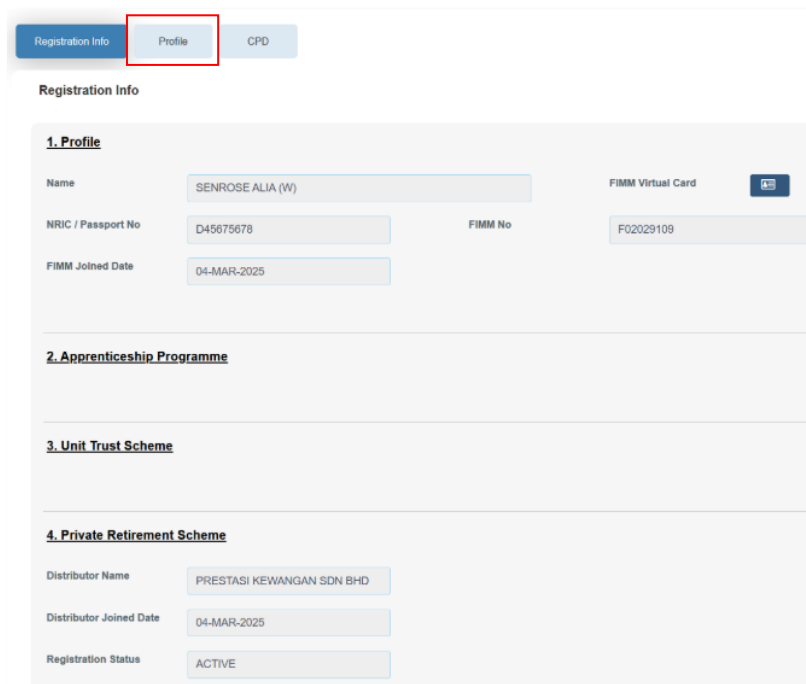


Figure 3: Profile Management Sub Menu

2. System will display the main page of consultant detail.

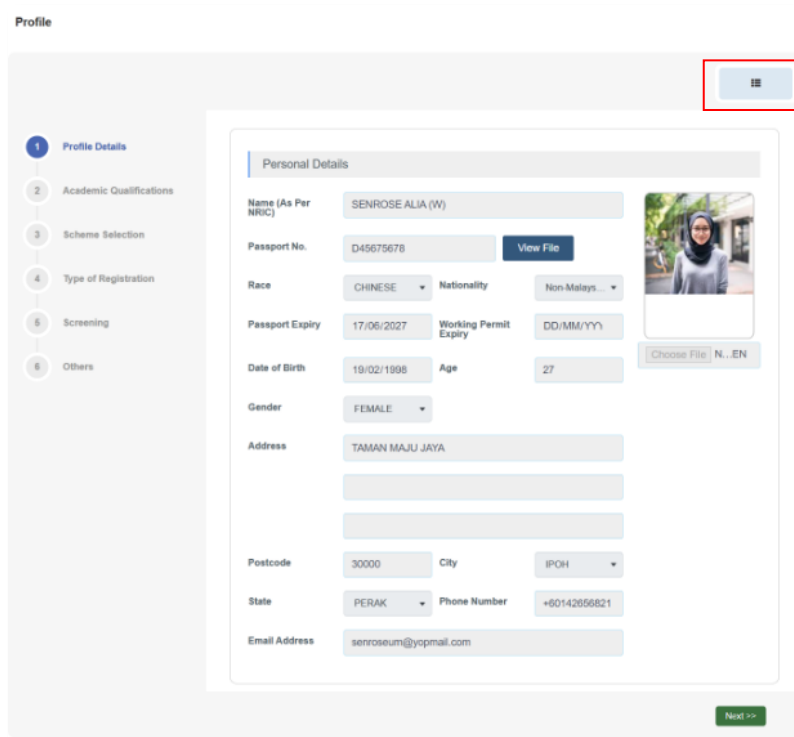
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The image shows a web interface for 'Registration Info'. At the top, there are three tabs: 'Registration Info', 'Profile', and 'CPD'. The 'Profile' tab is highlighted with a red box. Below the tabs, the 'Registration Info' section is displayed. It contains four main sections: 1. Profile, 2. Apprenticeship Programme, 3. Unit Trust Scheme, and 4. Private Retirement Scheme. The '1. Profile' section includes fields for Name (SENROSE ALIA (W)), FIMM Virtual Card (F02029109), NRIC / Passport No (D45675678), FIMM No (F02029109), and FIMM Joined Date (04-MAR-2025). The '4. Private Retirement Scheme' section includes fields for Distributor Name (PRESTASI KEWANGAN SDN BHD), Distributor Joined Date (04-MAR-2025), and Registration Status (ACTIVE).


Figure 4: Registration Info


User click tab 'Profile', system will display profile details.



The image shows a web interface for 'Profile'. At the top, there are three tabs: 'Registration Info', 'Profile', and 'CPD'. The 'Profile' tab is highlighted with a red box. Below the tabs, the 'Profile' section is displayed. It contains a sidebar with a list of steps: 1. Profile Details, 2. Academic Qualifications, 3. Scheme Selection, 4. Type of Registration, 5. Screening, and 6. Others. The '1. Profile Details' section is selected. It includes a 'Personal Details' form with fields for Name (As Per NRIC) (SENROSE ALIA (W)), Passport No. (D45675678), Race (CHINESE), Nationality (Non-Malays...), Passport Expiry (17/06/2027), Working Permit Expiry (DD/MM/YY), Date of Birth (19/02/1998), Age (27), Gender (FEMALE), Address (TAMAN MAJU JAYA), Postcode (30000), City (IPOH), State (PERAK), Phone Number (+60142656821), and Email Address (senroseum@yopmail.com). There is also a 'View File' button and a 'Choose File' button. A 'Next >>' button is at the bottom right.

Figure 5: Profile Detail

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3. User click  and choose 'Renewal'. This option will be made available if:
- Within Renewal period. (FIMM will announce once the renewal submission is opened)
 - Consultant's Registration Status is Active.

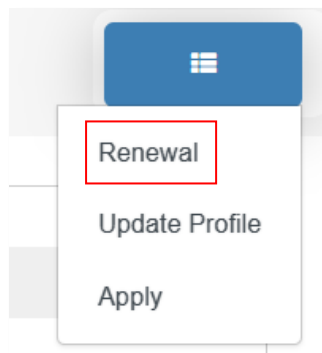



Figure 6: Action Sub Menu

4. System will display Renewal page with four tabs:
- Registration Info
 - Profile
 - CPD
 - Renewal.
5. In tab Renewal, system will display all information required for Renewal.


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6. The conditions for renewal are as follows:

- i. Consultant must obtain a minimum of 16 CPD points in the current year before an application for renewal of his registration will be considered by FIMM.
- ii. Where a Consultant has registered with FIMM after January of the current year, the CPD points' requirements for his first renewal will be calculated on a pro-rata basis.
- iii. If CPD Points is sufficient for renewal, renewal process is allowed. Else, system will block to proceed for renewal process.
- iv. Once user submit, the renewal request will be sent to the registered distributor.

7. If Consultant meet all conditions for renewal, system will display.

- i. Renewal section
 - a. Year (Note: Subsequent Year)
 - b. CPD Points for Renewal (Note: Based on prorata calculation)
 - c. CPD Points Collected (Note: Total CPD Points that had been collected and approved in current year)
- ii. Declaration section
 - a. Name (As per NRIC) (Note: Automatically populate)
 - b. NRIC/ Passport No (Note: Automatically populate)
 - c. Tick box for declaration*

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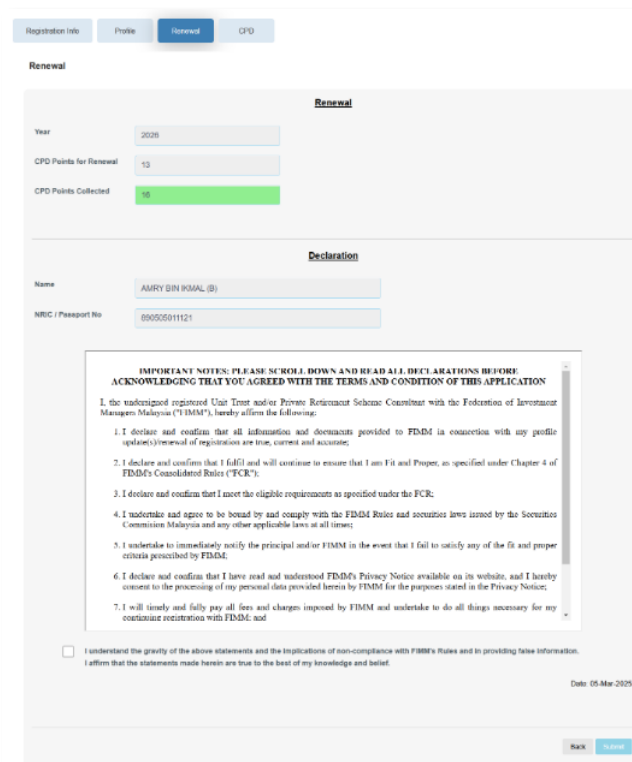


Figure 7: Renewal page

- iii. To submit the application,
- User is required to tick the agreement checkbox and click button

Submit

- System will display popup message “Confirm to proceed?”



Figure 8: Popup Proceed Message

- If user choose **YES**, system will popup message “Renewal Request Submitted”.

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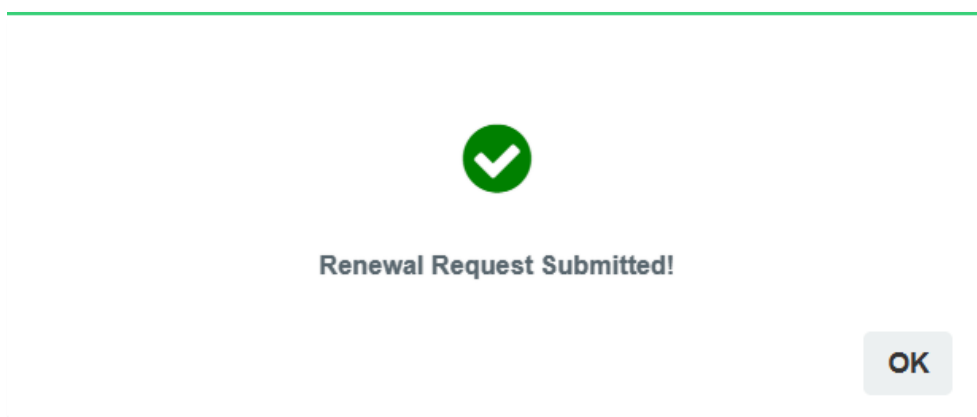


Figure 9: Pop Up Submitted Message

d. Status change to "Submitted" in Application Status.

Application Status

Show entries Search:

SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	SCHEME	STATUS	ACTION
05-Mar-2025 08:38:14am	Prestasi Kewangan Sdn Bhd	Registration	PRS	Approved	
05-Mar-2025 09:27:07am	Prestasi Kewangan Sdn Bhd	Profile Update		Submitted	
05-Mar-2025 11:51:18am	Prestasi Kewangan Sdn Bhd	Renewal	PRS	Submitted	

Showing 1 to 3 of 3 entries Previous **1** Next

Figure 10: Renewal Submitted Status

8. If the CPD Points collected is not sufficient for renewal, system will display "You have insufficient CPD for renewal. Kindly contact your distributor and complete the CPD requirement by 31 December <current year>."

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The screenshot shows the 'Renewal' section of the FIMM portal. At the top, there are four tabs: 'Registration Info', 'Profile', 'Renewal' (which is active), and 'CPD'. Below the tabs, the 'Renewal' form is displayed. It includes three input fields: 'Year' with the value '2026', 'CPD Points for Renewal' with the value '13', and 'CPD Points Collected' with the value '0'. Below the 'CPD Points Collected' field, there is a message: 'You have insufficient CPD for renewal. Kindly contact your distributor and complete the CPD requirement by 31 December 2025'. At the bottom right of the form, there are two buttons: 'Back' and 'Submit'.

Figure 11: Renewal - Insufficient CPD Points

9. User click  button,
 - i. System will display popup message "Unsaved data will be lost. Do you want to continue?".

The screenshot shows a modal dialog box with the text 'Unsaved data will be lost. Do you want to continue?'. At the bottom right of the dialog, there are two buttons: 'YES' (highlighted in yellow) and 'NO' (highlighted in light blue).

Figure 12: Unsaved Data Message

10. User can navigate to Application Status submenu under the Consultant menu to view Application Status.

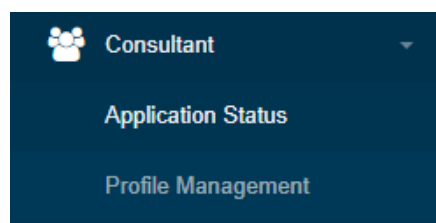


Figure 13: Application Status submenu