

## Focus on accreditation

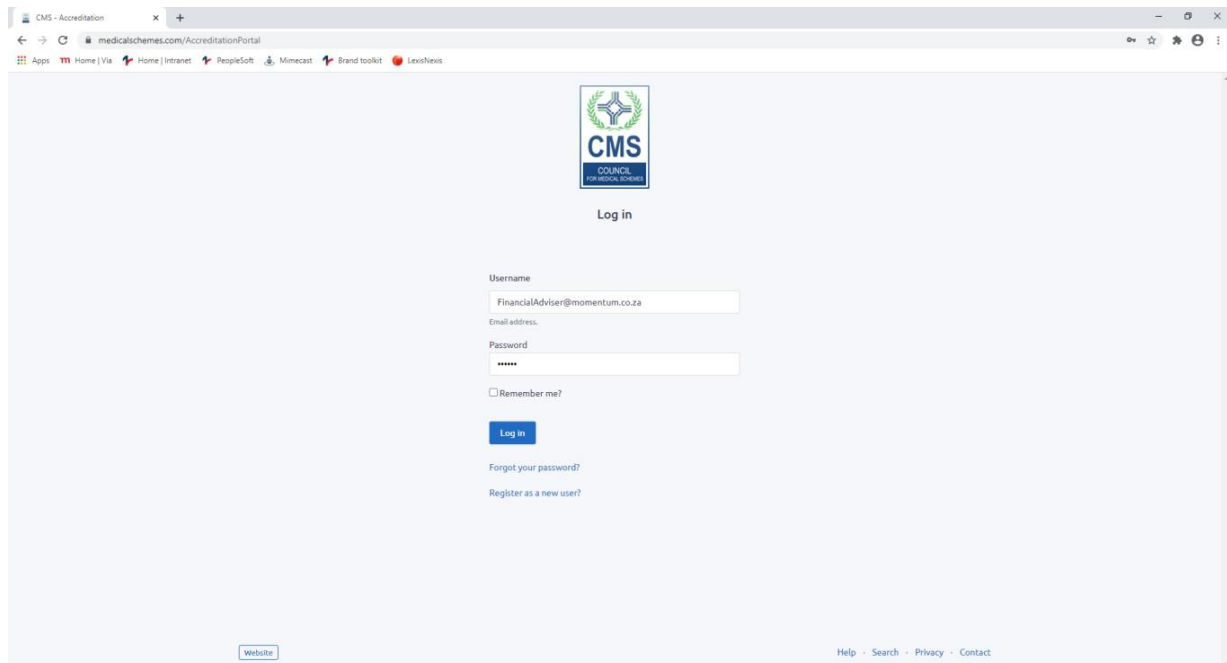
### Council for Medical Scheme accreditation: Process to renew or apply

Healthcare advisers need to apply and renew their Council for Medical Scheme (CMS) accreditation online at <https://www.medicalschemes.com/AccreditationPortal>.

#### Process for renewal applications

- Click on the Broker/Brokerage Portal and go to the login page.
- Complete your email address (as username) and password.
- Your details will be pre-populated for you to complete your renewal application.
- Follow the Individual Broker application process outlined below. Complete each section and click on Save and continue before completing the next section.
- If the portal does not recognise you, select the Forgot your password option.
- You will receive an email with a link to reset your password.

If you experience any problems, contact the Council for Medical Schemes on **0861 123 267** or send an email to [information@medicalschemes.co.za](mailto:information@medicalschemes.co.za).



The screenshot shows a web browser window displaying the CMS Accreditation Portal login page. The browser's address bar shows the URL <https://www.medicalschemes.com/AccreditationPortal>. The page features the CMS logo at the top center, which includes a green cross and the text 'CMS COUNCIL FOR MEDICAL SCHEMES'. Below the logo is a 'Log in' heading. The login form consists of the following fields and elements:

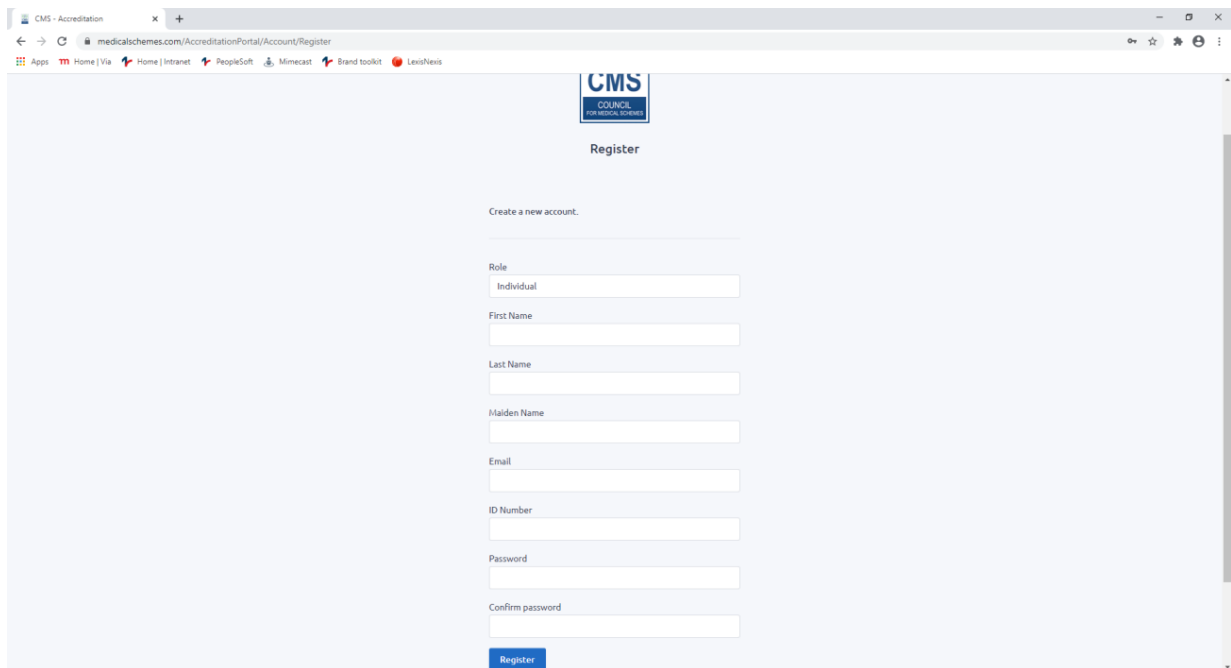
- Username:** A text input field containing the email address 'FinancialAdviser@momentum.co.za'.
- Email address:** A text input field, currently empty.
- Password:** A text input field with masked characters (dots).
- Remember me?** A checkbox that is currently unchecked.
- Log in:** A blue button.
- Forgot your password?:** A link below the login button.
- Register as a new user?:** A link below the forgot password link.

At the bottom of the page, there is a 'Website' link on the left and a footer with 'Help · Search · Privacy · Contact' on the right.



## Process for new applications

- Click on the Broker/Brokerage Portal and go to the login page.
- Click on Register as a new user, submit your details and click on Register.
- Click on the link in the activation email that you will receive and proceed to the login page.
- Complete each section of the application and remember to click on Save and continue at the bottom of each section.

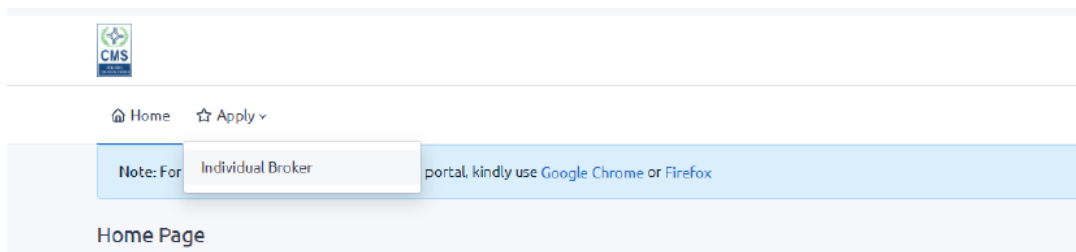


The screenshot shows a web browser window with the URL [medicalschemes.com/AccreditationPortal/Account/Register](https://medicalschemes.com/AccreditationPortal/Account/Register). The page title is "Register" and it features the CMS logo. Below the logo, it says "Create a new account." and lists the following fields: Role (with a dropdown menu showing "Individual"), First Name, Last Name, Maiden Name, Email, ID Number, Password, and Confirm password. A blue "Register" button is located at the bottom of the form.

## Additional information for MFP planners

### Home page

- Complete your personal details.
- The FSP/FSB number for Momentum is **6406**.
- Click on Submit.
- You will receive a notification that your user details have been successfully updated.
- Click on Apply and then on Individual Broker at the top left of the home page.





## Section A

- Verify that your details are correct.
- Enter your accreditation number previously allocated (if applicable) in section A – Question 9.
- Question 10: The FSP number should reflect as 6406.
- Enter your academic qualification and obtain a certified copy (certification not older than three months) of your qualifications, including your matric certificate or statement of credits, if applicable. A certified copy of your highest qualification must be uploaded in Section E.
- Question 12: Provide details of your relevant employment history. Attach a copy of your mandate, or health agreement in Section E. Copies of the relevant documents are available in your IBox Vault or you can request copies from your Portfolio Assistant.

## Section B

- Question 13: Select Yes.
- Question 14: Complete Momentum Metropolitan Life’s accreditation number as 1116 and press the enter key. It will auto update the employer fields.
- Select No to questions 14(b) and 14(c).
- Click Save and continue.

Section B:  
Note: (Manner of providing broker services)

13. Are you or will you function as a broker in formal employment? \*

Yes  No

14. Name, details and accreditation number (if applicable) of employer  
(Enter accreditation number without the prefix and press the enter key to search)

ACCREDITATION NO.	NAME OF EMPLOYER	HEAD OF ORGANISATION	ACCREDITATION START DATE	ACCREDITATION END DATE
1116	MOMENTUM METROPOLITAN LIFE	NICOLAAS KRUGER	11/16/2019	11/15/2021

b) As a member of a partnership/close corporation or other legal entity? \*

No  Yes



## Section C

- Section C must only be completed by applicants applying as a **sole proprietor or independent broker**. You can move to the next section if no changes need to be made.
- If you receive an error message on submission, complete Section C as follows:
  - Question 16 is not applicable, leave it blank.
  - Question 17: Select Momentum Medical Scheme from the drop-down list and enter the date you started advising on Momentum Medical Scheme products as an accredited/apprentice broker.
  - Questions 18 and 19 are not applicable, leave them blank.
  - Click on Save and continue.

## Section D

Answer all the fit and proper requirement questions and where you have answered No, complete N/A in the block which asks for reasons (don't leave it blank).

The screenshot shows a web browser window with the URL [medicalschemes.com/AccreditationPortal/Broker/NewBroker](https://medicalschemes.com/AccreditationPortal/Broker/NewBroker). The page is titled "Section D: (Fit and proper requirements)". It contains a list of questions (20-26) with radio buttons for "Yes" and "No (Upload/Reason)". The "No" option is selected for all questions, and the "Reason" field is filled with "N/A" for questions 20-24 and "Please provide reason" for questions 25 and 26.

Question	Yes	No (Upload/Reason)
20. Have you within a period of five years preceding the date of application been found guilty by any professional or financial services industry body (whether in the Republic or elsewhere), of an act of dishonesty, negligence, incompetence or mismanagement?	<input type="radio"/>	<input checked="" type="radio"/> N/A
21. Have you within a period of five years preceding the date of application been denied membership of anybody referred to in 18 on account of an act of dishonesty, negligence, incompetence or mismanagement?	<input type="radio"/>	<input checked="" type="radio"/> N/A
22. Have you within a period of five years preceding the date of application been found guilty by any regulatory or supervisory body (whether in the Republic or elsewhere) or has an authorisation to carry on business been refused, suspended or withdrawn by any such body on account of an act of dishonesty, negligence, incompetence or mismanagement?	<input type="radio"/>	<input checked="" type="radio"/> N/A
23. Have you at any time prior to the date of application been disqualified or prohibited by any court of law (whether in the Republic or elsewhere) from taking part in the management of any company or other statutorily created, recognised or regulated body, irrespective whether such disqualification has since been lifted or not?	<input type="radio"/>	<input checked="" type="radio"/> N/A
24. Have you been involved with a corporation, which has been censured, disciplined, suspended or refused membership or registration by a stock exchange, futures exchange, other market or regulatory authority?	<input type="radio"/>	<input checked="" type="radio"/> N/A
25. Have you had any judgment (including a finding of fraud, misrepresentation or dishonesty) given against you in any civil proceedings, in South Africa or elsewhere or are there any proceedings now pending which may lead to such a judgment?	<input type="radio"/>	<input checked="" type="radio"/> Please provide reason
26. Have you been the subject of any investigation or disciplinary proceedings by any regulatory authority (whether in the Republic or elsewhere) or exchange, professional	<input type="radio"/>	<input checked="" type="radio"/> Please provide reason

## Section E

- Upload certified copies (certification not older than three months) of:
  - Question 32.1: Your ID or valid passport; and
  - Question 32.2: Your highest academic qualification (minimum matric).
- Question 32.3: Select Yes and attach a copy of your mandate or health agreement (refer to Section A, question 12).
- Question 32.4: Select No and as reason state Employed broker.
- Question 32.5: Select No and as reason state Employed broker.



- Question 32.6: Select No and as reason state N/A, unless your current surname differs to the surname on your academic qualification, in which case select Yes and provide a certified copy of your marriage certificate.
- Question 32.7: Select No and as reason state Employed broker.
- Question 32.8: Select No and as reason state Accredited broker. If you are applying to be accredited as an apprentice broker, select Yes and attach a copy of your signed supervision agreement.
- Question 32.9: Attach a copy of your proof of payment.
  - Bank account details for the Council for Medical Schemes:  
Bank: Absa  
Branch code: 517245  
Branch name: Vermeulen Street  
Account number: 4051163394  
Reference: Your ID number or your full names and surname
- Question 32.10: Upload the MIE report with the original email from MIE. You can request the report from your Portfolio Assistant.
- Click Save and continue.

### Section F

- Read the Consent for the use of Personal Information disclosures and select I hereby consent to the above use of Personal Information.
- Click on Save and continue.

### Section G

- Read the Declaration by applicant section and select all three declarations and undertakings.
- When done, click Submit.
- Should any information be missing or incomplete on the online application form, you will receive an error message and the portal will request you to correct the error(s) on the form.
- The system will alert you to any outstanding information in each section when you click on Save and continue.

### CMS contact centre

If you need any additional assistance, or if you experience any problems with the online portal, contact CMS on **0861 123 267** or email them at [information@medicalschemes.co.za](mailto:information@medicalschemes.co.za).

### Confirmation of submission

Once you have submitted your application, you will receive a confirmation email from CMS. Save the email for future reference and send a copy of it to your Regional Manager and Provincial Compliance Officer.



## Product accreditation for Momentum Medical Scheme, Complementary products, Health4Me and GapCover

The various online accreditation exams must be completed annually and are available on FAIS Exchange. To access the exams, log in to [Product Assessments and FAIS Compliance | FAIS Exchange](#) and enter your login credentials. Then scroll down to the Momentum Product category.

### Login credentials format on FAIS Exchange

Username: Your ID number

Password: firstname@FAIS (first name in lower case, FAIS in upper case)

You can also click on “Forgot Password” to reset your password.

Momentum GapCover
Momentum Guardrisk Life (Wealth)
Momentum Health Solutions
Momentum Health4Me

The product category consists of the full PST assessments and the product update for the new changes.

### Example for Health:

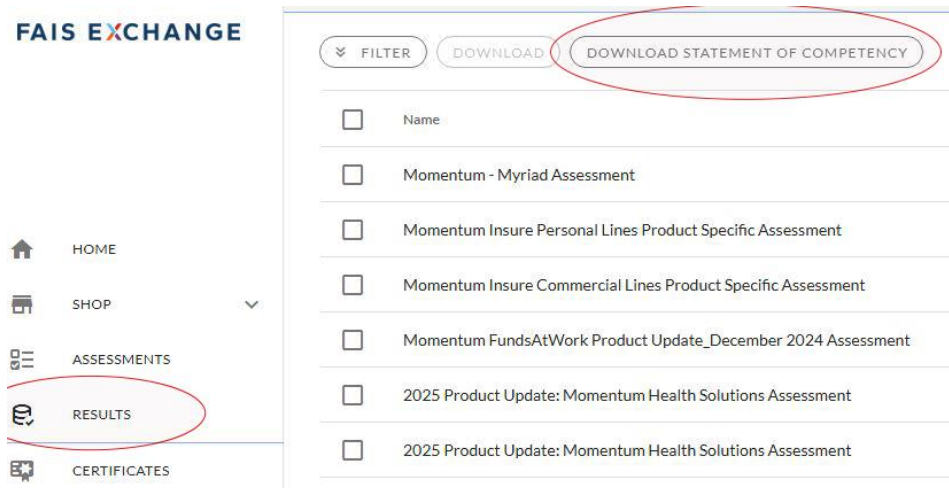
Momentum Health Solutions
Name
2025 Product Update: Momentum Health Solutions Assessment
Momentum - Health Solutions Custom Option Assessment
Momentum - Health Solutions Evolve Option Assessment
Momentum - Health Solutions Extender Option Assessment
Momentum - Health Solutions General Assessment
Momentum - Health Solutions Incentive Option Assessment
Momentum - Health Solutions Ingwe Option Assessment
Momentum - Health Solutions Summit Option Assessment

If you are new to the industry and/or new to Momentum products and have not written any previous health related accreditations, you must first complete the PST assessments under the Momentum Product Specific Assessments category on FAIS Exchange.



If you are an experienced adviser and missed the 2024 and prior product updates, you need to complete the full PST assessments in order to be viewed as competent. Thereafter, you will only need to remain up to date with the annual Product Updates.

Once you have completed the assessment, you will be able to download a Statement of Competency.



If you do not have access to FAIS Exchange, email [MDSFitProper@momentum.co.za](mailto:MDSFitProper@momentum.co.za) to register and get access to the Momentum assessments. Please include your name and surname, email address, ID number (for unique identification purposes on the system), broker code and Momentum Business Consultant's name and surname. The MDS Fit and Proper team will send the request to FAIS Exchange for registration and respond with the login credentials.