GA e-Exams Quick Guide Managing Memberships

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Civil Aviation Authority
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Beehive Ring Road
Crawley
West Sussex
RH6 0YR

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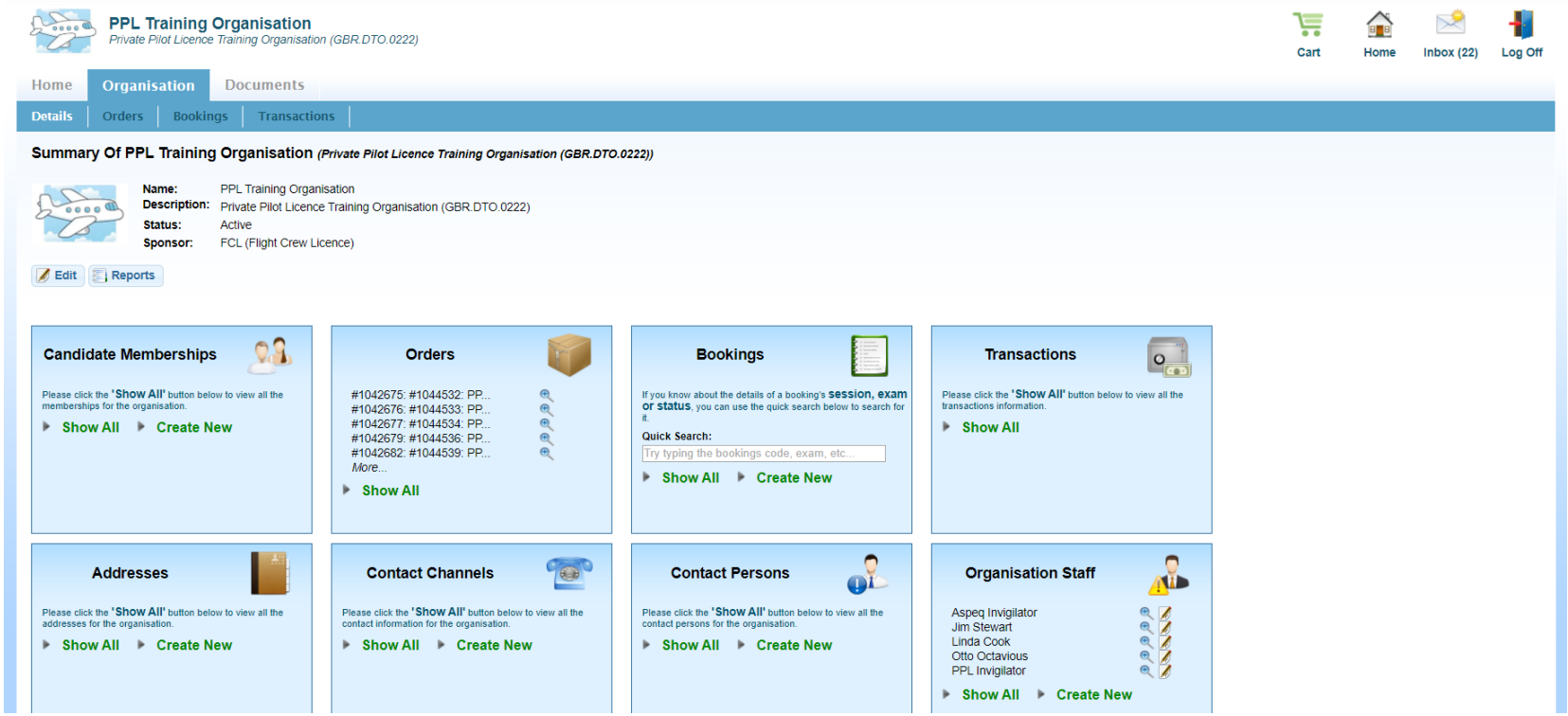
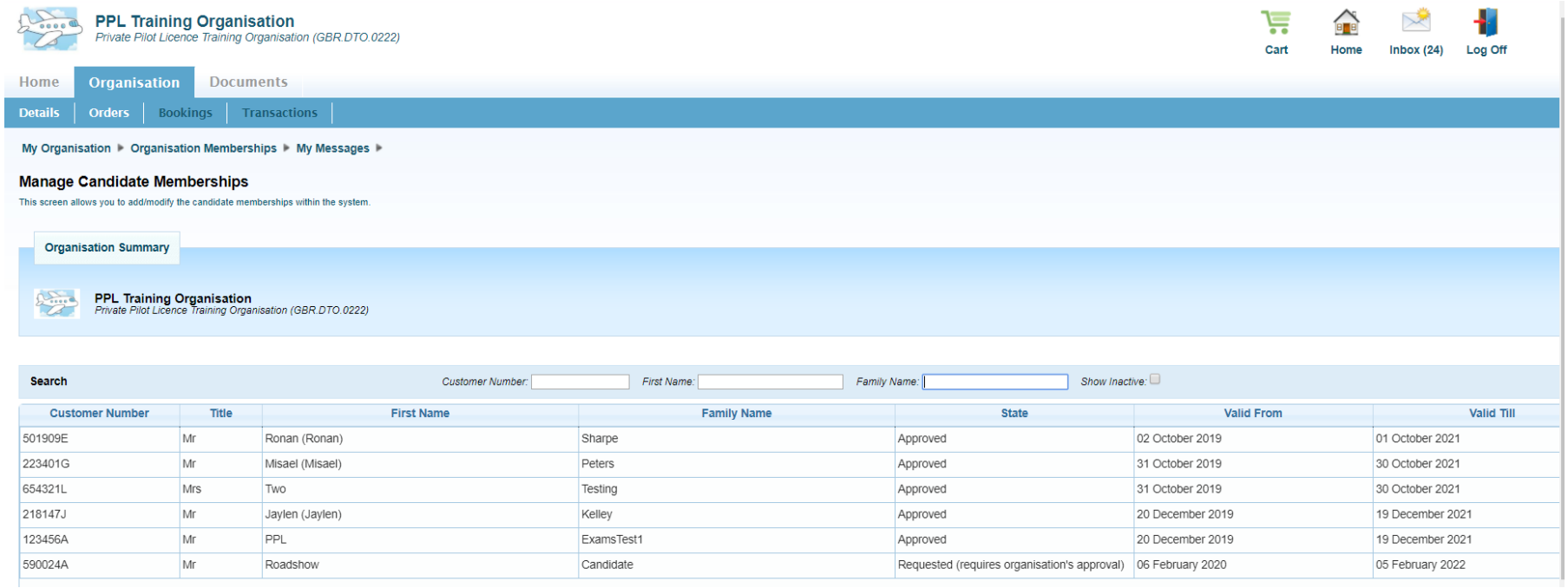
Enquiries regarding the content of this publication should be addressed to: PPLExams@caa.co.uk

Candidate Memberships



- To access membership information, go to Organisation/Details and click on “Show All” in the Candidate Memberships tab.
- Note: Before a Training Organisation is able to view the candidate’s information or act on their behalf and make bookings and view results the candidate and TO must have an approved membership where both the candidate and TO agree to the relationship.

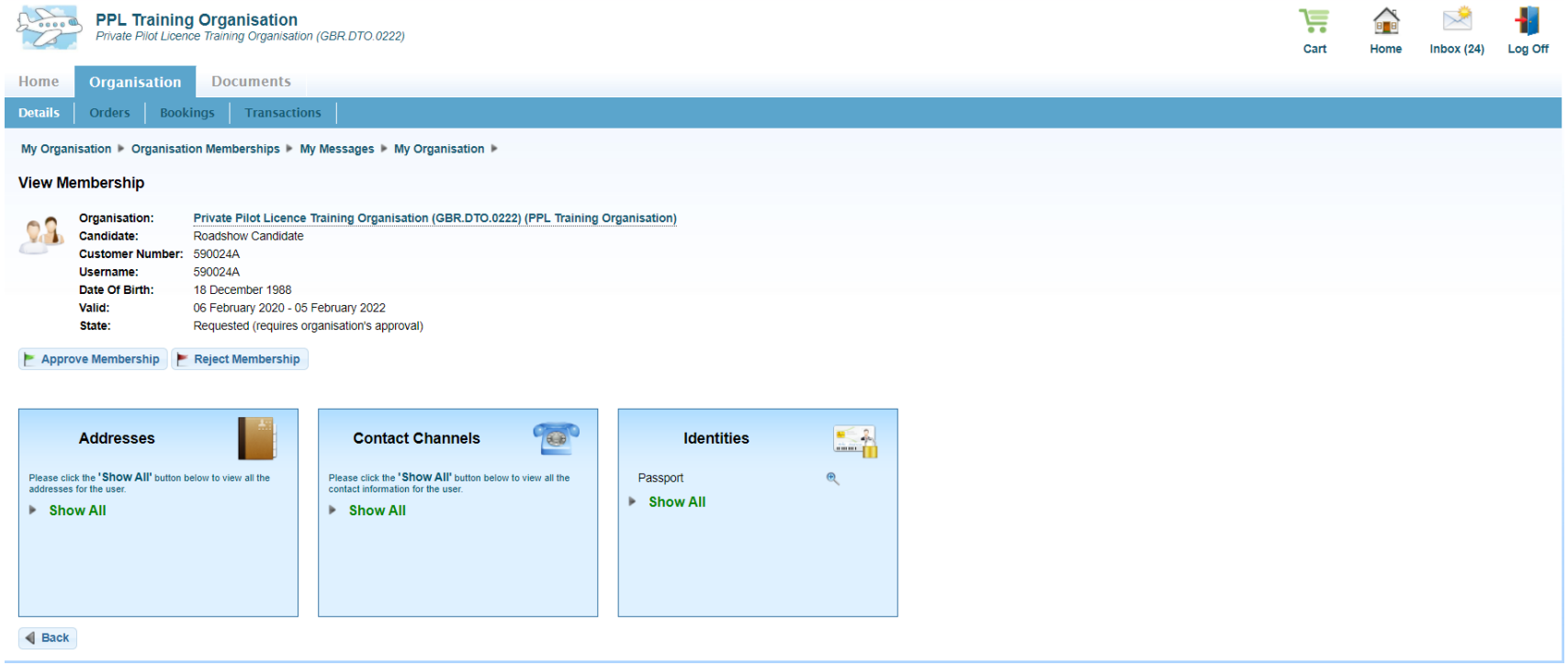
Approving a Request for Membership from a Candidate (1)



Customer Number	Title	First Name	Family Name	State	Valid From	Valid Till
501909E	Mr	Ronan (Ronan)	Sharpe	Approved	02 October 2019	01 October 2021
223401G	Mr	Misael (Misael)	Peters	Approved	31 October 2019	30 October 2021
654321L	Mrs	Two	Testing	Approved	31 October 2019	30 October 2021
218147J	Mr	Jaylen (Jaylen)	Kelley	Approved	20 December 2019	19 December 2021
123456A	Mr	PPL	ExamsTest1	Approved	20 December 2019	19 December 2021
590024A	Mr	Roadshow	Candidate	Requested (requires organisation's approval)	06 February 2020	05 February 2022

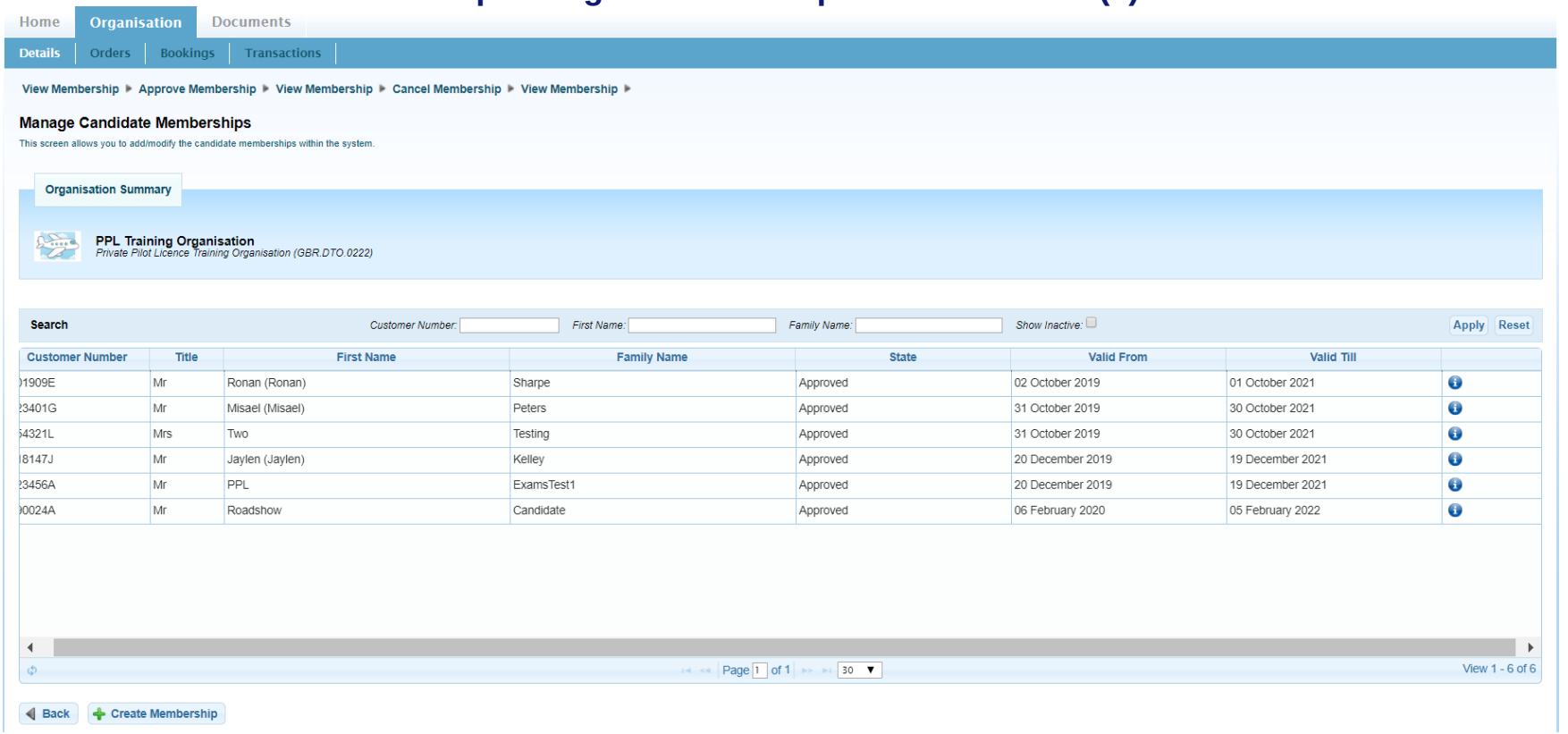
- When a Candidate requests a membership, this will appear with the “State” column being set to “Requested” (requires organisation’s approval)
- To access further information and either approve or reject the membership request double click on the Candidate

Approving a Request for Membership from a Candidate (2)



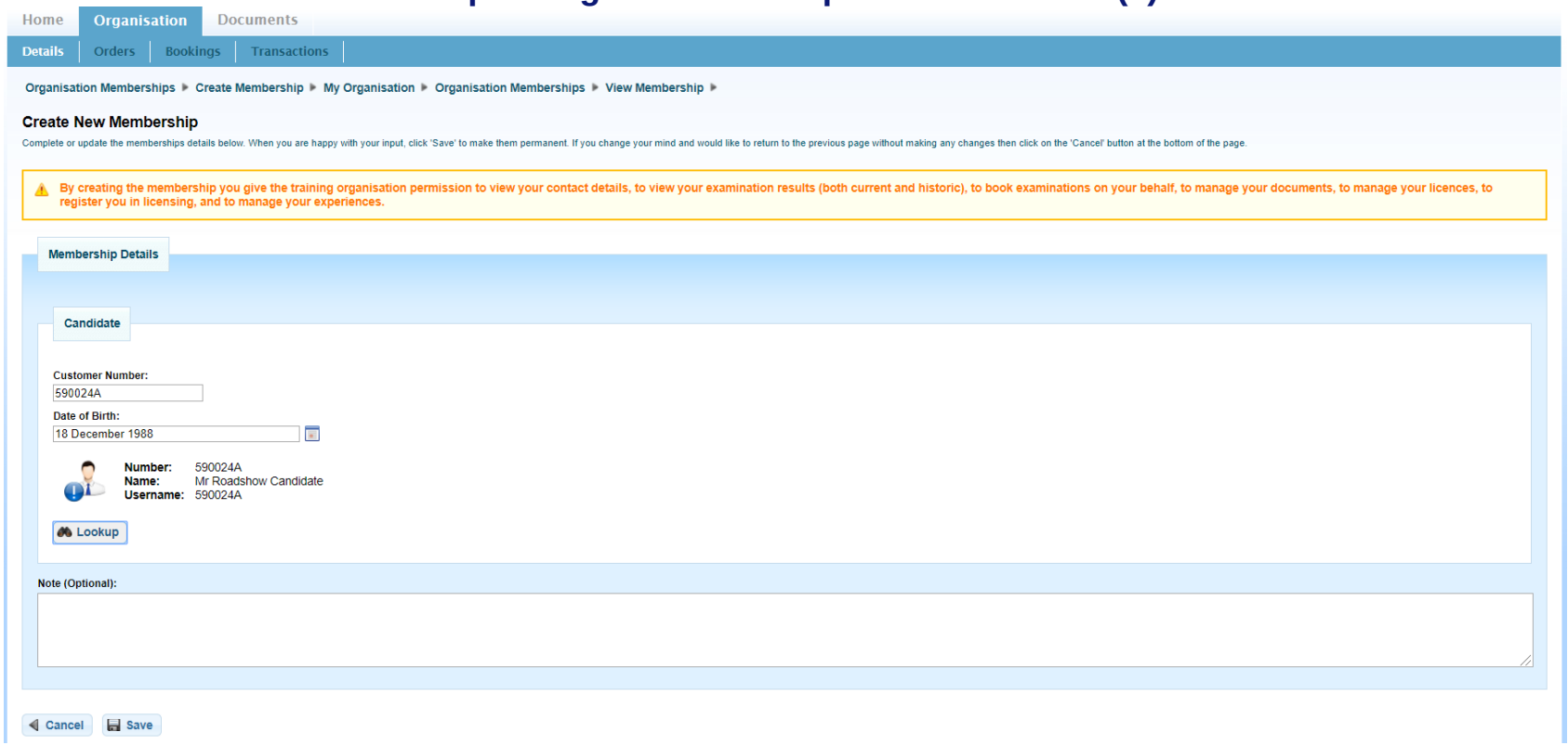
- If the Candidate has a relationship with your TO click “Approve Membership” and then Continue
- If the Candidate does not have a relationship with your TO click “Reject Membership” and then Continue
- If you approve the membership, you are able to book e-Exams on the candidate’s behalf and view their results

Requesting a Membership for a Candidate (1)



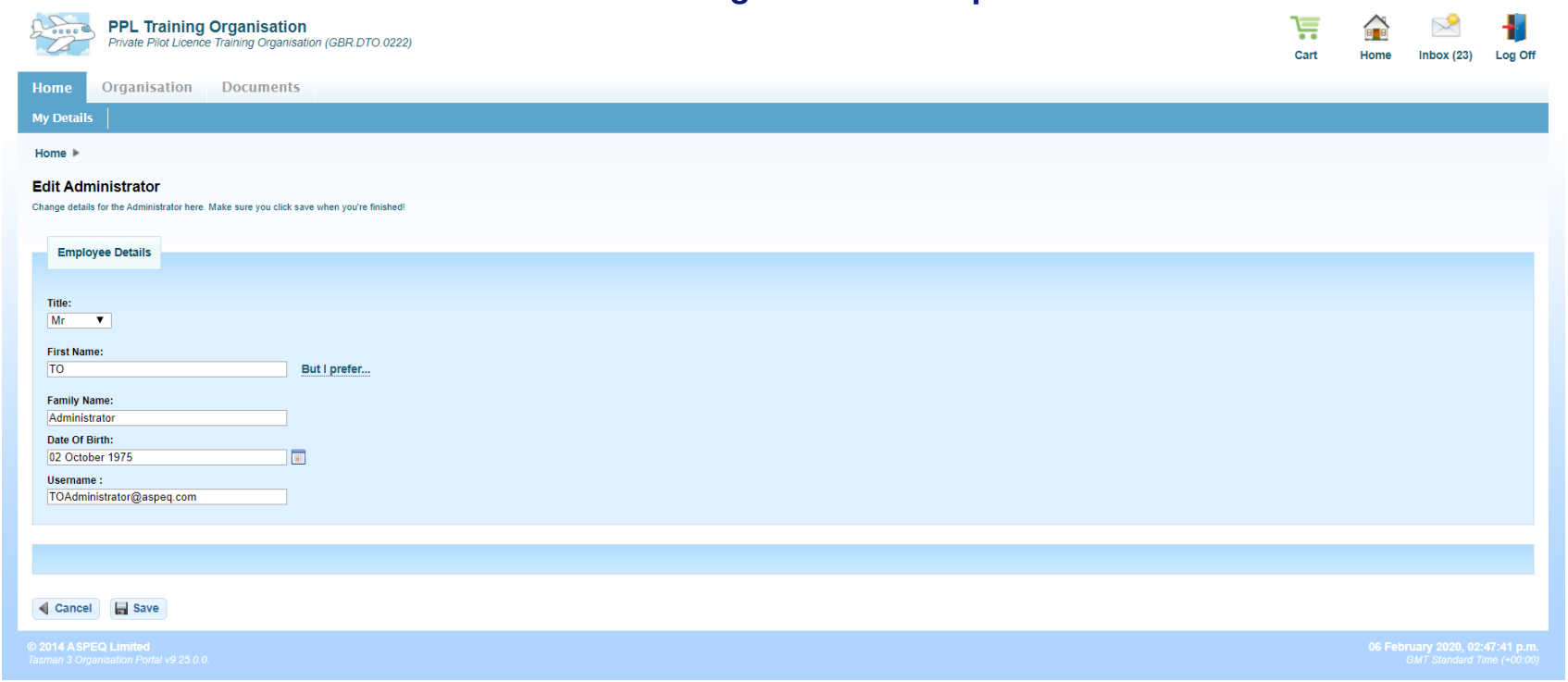
- To create a Membership request to a candidate, click on “Create Membership”
- The candidate will need to approve the membership request in the candidate portal before you will be able to act on the candidate’s behalf

Requesting a Membership for a Candidate (2)



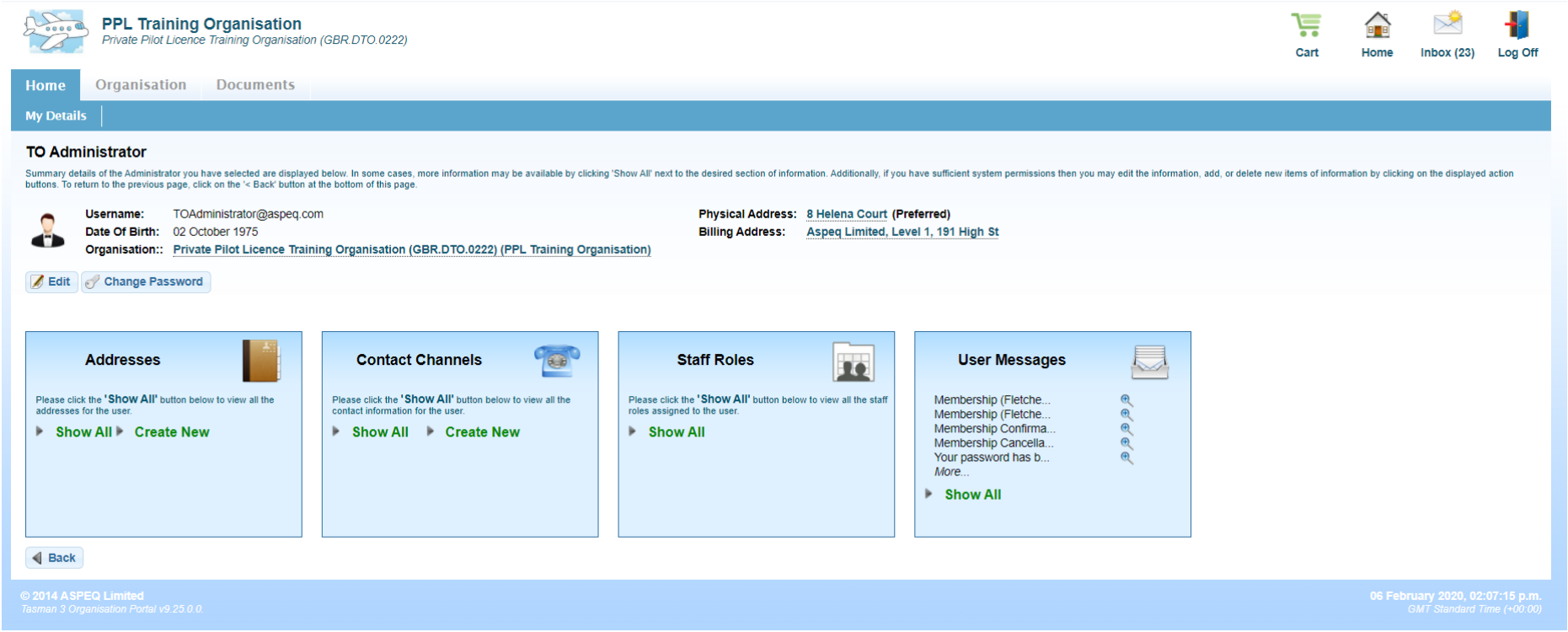
- You will need to enter the candidate's CAA Reference Number and their Date of Birth then click "Lookup"
- If this is the candidate, you would like to request a membership with click "Save"
- The candidate will receive the membership request and will need to accept the request in their candidate portal before the relationship is approved

Cancelling a Membership



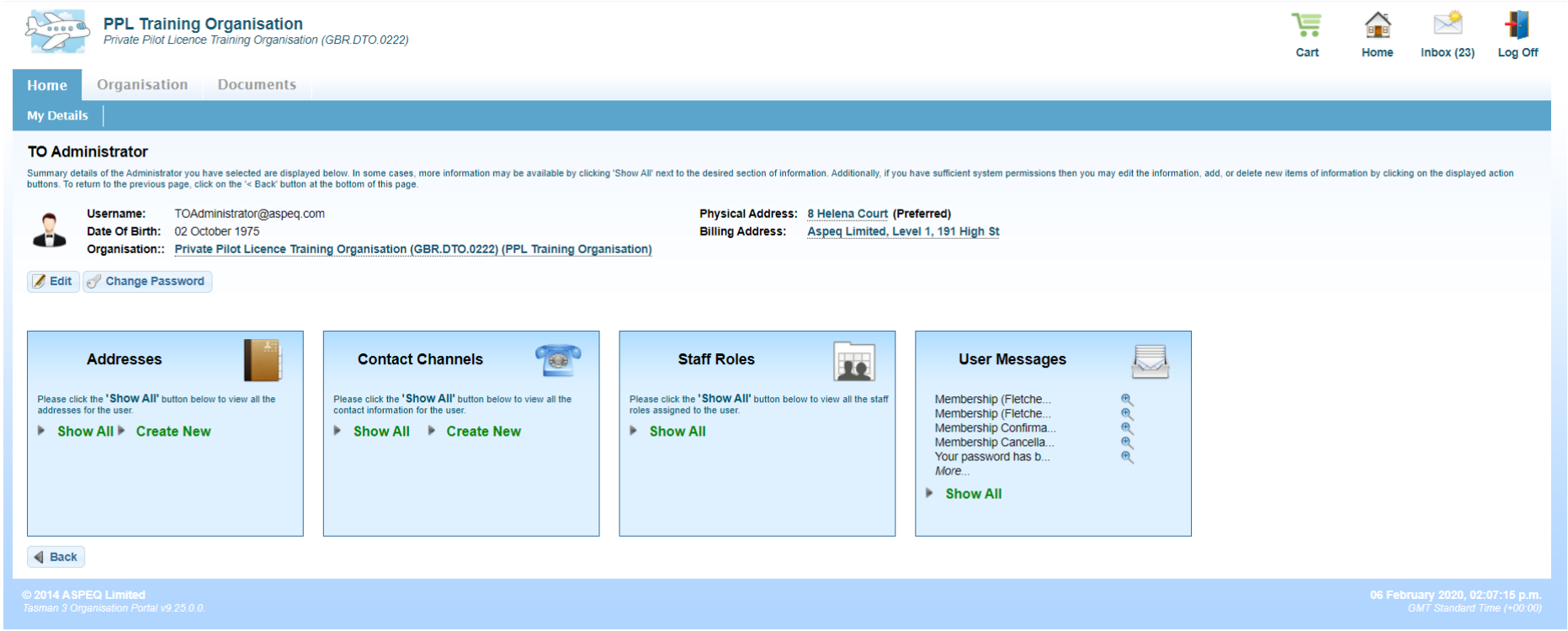
- To cancel a membership where you no longer have a relationship with a candidate go to Organisation/Details/Candidate Memberships/Show All and double click on the candidate concerned
- Click on “Cancel Membership”, then “Continue” and the membership will be cancelled. You will not be able to view the candidates details after the membership is cancelled.
- The candidate will not be able to be booked for future e-Exams until a new membership is created with a Training Organisation

Update Personal Details



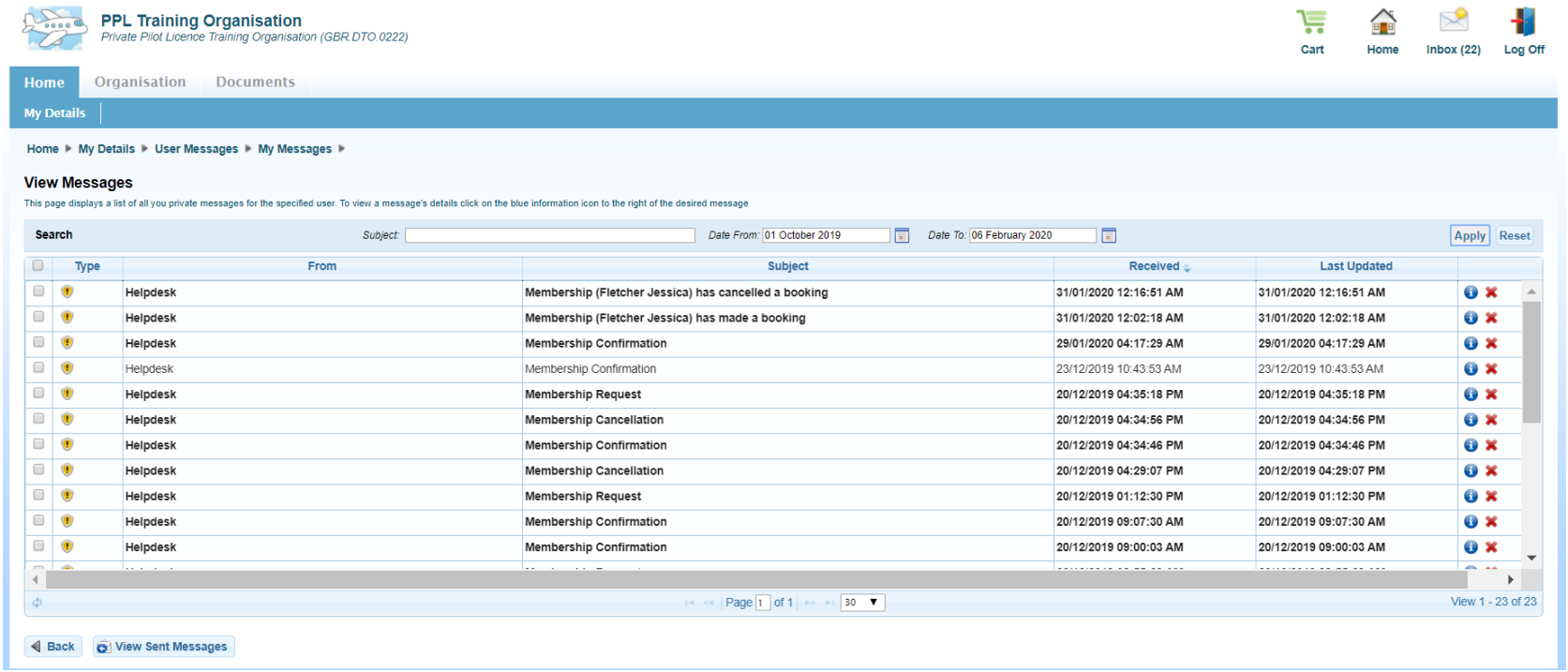
- You can add / alter your Address and Contact Details by clicking on “Show All” or “Create New” in the Address and Contact Channels tabs

TO Portal Messaging (1)



- To Access the e-Exam Messages Click on “User Messages” or “Inbox

TO Portal Messaging (2)



- When certain activities are undertaken (membership change, booking, result released) e-Exams produces automated messages into the TO Portal Inbox and are also sent to the TO Portal Administrators E-Mail address
- To access the message details double click on the message