

CFA Institute®

Testing Accommodations

for Proctored Exams

Candidate Guidebook

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Exam Disability Accommodations

We are committed to offering our proctored exams to individuals with disabilities and in compliance with legal requirements.

What You Need to Know Before Initiating a Request

✓ You must be registered for an exam administration in order to submit a request for accommodation

✓ Follow the published deadlines and submit all requested documentation through the secure online portal.

✓ A decision from CFA Institute is needed before scheduling your exam. Do not schedule your exam appointment until you hear from us regarding a decision on your submission.

✓ Review the Frequently Asked Questions

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Request Submission Deadlines

Requests for Disability Accommodation are reviewed on a case-by-case basis and must be submitted by the accommodation request deadline associated with your exam registration, for both new and returning candidate requests. Request forms and/or documentation submitted after the accommodation request deadline will not be reviewed.

Candidates who wish to submit a request for disability accommodations should not schedule their exam appointment until a determination has been made on their request.

CFA® Program & CIPM® Program

The deadline to submit your request for accommodation depends on which registration deadline you registered under, e.g. the early registration deadline or the standard registration deadline. Please reference the Disability Accommodations webpage for the appropriate deadline information associated with your exam registration.

Sustainable Investing Certificate

You must submit your request within 30 days of registering for the Sustainable Investing Certificate program.

If you are considering Online Proctored Testing, please note that not all accommodations are available. Read the Disability Accommodations Form carefully.

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Comfort Requests

Items on Prometric's pre-approved personal items list don't require a disability accommodations request or CFA Institute approval. Food and non-water beverages are not permitted in the testing room. However, candidates may keep them in the personal belongings area which can be accessed during the optional scheduled break. For comfort requests, including nursing accommodations, contact examadmin@cfainstitute.org. These are reviewed on a case-by-case basis and depend on test center availability, so approval isn't guaranteed. Submit requests as early as possible.

Returning & Deferred Candidates

CFA® Program: Returning candidates, visit your CFA Program tile for further instructions. Upon accessing your exam tile, you will either be prompted to review and confirm your previously approved accommodation request or directed to submit a disability accommodations request form.*

CIPM® Program and Sustainable Investing Certificate candidates: Candidates with previously approved CFA Institute accommodations must submit a disability accommodations request form for each exam administration.* Documentation requirements:

- Same accommodation: No new documentation is required.
- Changes to accommodation: Submit the form with new documentation supporting the updated request.

*This applies even if you deferred your exam, as accommodations do not transfer automatically.

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Requested Documentation

What to submit

1 Medical Professional Questionnaire & Personal Statement

The Medical Professional Questionnaire form should be completed and signed by a qualified medical professional and returned to us. You should complete the personal statement, addressing the impact of your diagnosis and why the accommodations sought are necessary.

To help us understand your unique experience which may not be captured elsewhere in your documentation, candidates are encouraged to describe, in their your own words, your current functional limitations as it relates to your test-taking abilities under standard conditions and why the accommodations sought are necessary.

2 Comprehensive Diagnostic Evaluation Report

We request that you submit your most recent evaluation report (ideally within the last 3 years) with DSM-V code if applicable. This should come from a qualified professional and can't be substituted with general letters. You may submit an evaluation report that is more than three years old; however, documentation that doesn't accurately reflect or describe your current level of impairment may impact the evaluation of your request.

3 Supporting Documentation

If applicable, you will need to submit documentation that demonstrates a history of impairment or limitation, such as proof of prior testing accommodations, including college-entrance or professional exams (e.g., SAT, ACT, GRE, GMAT, LSAT), college/university accommodations, or special education services/plans.

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Submit all documentation in English within ten (10) business days of submitting the request form, but no later than the deadline.

Do not submit

- Documentation in a language other than English.
- General letters from medical professionals in place of a comprehensive evaluation report.
- Documents via email; use the secure online portal for submission.
- Protected documents, self-reports, or research articles.

CFA Institute recognizes that each individual's condition and situation is unique. When you request an accommodation, you should provide documentation that objectively demonstrates you have an impairment that reasonably hinders your ability to sit for a proctored exam under standard testing conditions. The information should reasonably show that the accommodation you seek will address your specific impairment as it relates to the appropriate proctored exam and testing environment.

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Guidelines for a Comprehensive Diagnostic Evaluation Report

A Comprehensive Diagnostic Evaluation Report should, at a minimum:

- Clearly state the diagnosed disability;
- Be up-to-date and comprehensive.
  - Candidates may submit an evaluation report that is more than three years old; however, it may be necessary to obtain a more recent evaluation report to determine appropriate accommodations. If this is deemed necessary, you will be notified accordingly.
- With the exception of physical disabilities (inclusive of visual and hearing impairments), the qualified professional should base the diagnosis from the Diagnostic and Statistical Manual of Mental Disorders (DSM-5) or equivalent diagnostic standards (non-US);
- Include complete educational, developmental, and medical histories relevant to the disability for which testing accommodations are being sought;
- Include a list of the objective and norm-referenced test batteries (e.g., WAIS-IV, WIAT-III, WJ-IV, GORT-V, etc.) and test scores used to document the disability;

- For physical disabilities (inclusive of visual and hearing impairments), objective evidence should be provided in the form of the diagnostic tests administered and test scores, medical reports, surgical/procedural reports, physical therapy notes, photographs and scans (e.g., MRI, CAT, Retinal, etc.)
- Be typed or printed on official letterhead and be signed by an evaluator qualified to make the diagnosis (with information regarding licenses or certifications, and area of specialization)

✗ Letters from your medical professional are not considered comprehensive and may not be submitted in lieu of this requirement.

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Accommodation Request Process

1 Submit Online Request Form

After registering for an exam, submit the disability accommodation request form, using the links below, with the requested documentation. After you have submitted your request, you can view the status and details of your request online (log-in required).

2 Receive Decision

Please allow approximately four (4) weeks for the review and processing of your request. All accommodation requests and supporting medical documentation are carefully reviewed by exam administration personnel. You will receive notification regarding the status of your request once it has been evaluated, along with the next steps for scheduling your exam appointment.

3 Schedule Exam Appointment

Once a determination is made on your request, you will receive notification via email with instruction on how to proceed with scheduling your exam appointment. If you are granted accommodation, you may be advised to proceed with scheduling online, if your accommodation allows.

Some testing accommodations are not able to be scheduled through the online ProScheduler. In these cases, you will be instructed to to contact Prometric directly. A member of the Prometric team will work

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to schedule an exam appointment inclusive of your granted accommodation in your preferred testing area. Please note that this process may require additional processing time to arrange the logistical aspects of your granted accommodations request.

If you are not granted accommodation, you will still be permitted to take the exam under standard testing conditions and will be provided instruction on how to proceed with scheduling your exam appointment.

Important Note: The exam appointment general scheduling deadline does not apply to Disability Accommodations candidates. Any emails from CFA Institute in reference to this can be disregarded.

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Frequently Asked Questions

Should I schedule my exam appointment before requesting accommodations?

No. Your appointment will need to include any approved accommodations; therefore, we ask that you do not schedule an exam appointment until we have completed our evaluation of your request. Once we have made a determination on your request, we will provide you with information on how to schedule your exam appointment.

Please note that if accommodation is granted, any existing appointment will automatically be cancelled so that a new appointment can be scheduled inclusive of any approved accommodation, if applicable.

What accommodations are offered?

When you complete the online request form, you may request accommodations which are both necessary and appropriate for your condition. Examples of testing accommodations offered include:

- Extended time
- Flexible, off-the-clock breaks
- Private rooms Reader to read questions and instructions on screen
- Screen reading technology
- Scribes to type or select answers
- Wheelchair-accessible testing stations*
- ZoomText font magnification

*To ensure that candidates with wheelchairs are scheduled in ADA-compliant testing labs and at wheelchair compliant workstations, we strongly encourage candidates who require wheelchair assistance to submit a Disability Accommodations Request form. Additional documentation is not required.

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Why must my Comprehensive Diagnostic Evaluation Report include neuropsychological testing?

The Comprehensive Diagnostic Evaluation Report should present objective evidence measuring the way in which the condition hinders major life activities used in taking one of our proctored exams, specifically, reading, thinking, and the like. Such information must show that the accommodation sought will address and ameliorate the specific measurable limitation suffered as a result of the condition. Typically, this objective evidence is reflected through an evaluation report with norm-referenced test batteries (e.g., WAIS-IV, WJ-IV, WIAT-III, GORT-V, etc.) and scores.

Will I receive reimbursement for any costs incurred in obtaining documentation?

No. CFA Institute does not reimburse for the costs associated with obtaining any required medical documentation.

Contact Information

We have a dedicated, but small, team who reviews and processes accommodation requests for all the CFA Institute exam programs. Unfortunately, we are unable to speak with candidates and/or their advocates as we must treat the handling of each case in the same manner.

Candidates may use our direct email address examadmin@cfainstitute.org for communication. We strive to respond to all inquiries within 5 US business days.

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