



CFA Institute



Disability Testing Accommodations

for Proctored Exams

Candidate Guidebook

Version 1

Published August 2023

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CFA Institute Disability Testing Accommodation for Proctored Exams

We are committed to offering the our proctored exams in a manner and location accessible to individuals with disabilities and in compliance with legal regulations.

Legal regulations apply to candidates with a significant impairment that limits, as compared to most people in the general population, their ability to sit for the exam.

Kindly note that we do not guarantee that requests for special testing accommodations will be granted, regardless of whether you have previously received special testing accommodations.

What You Need to Know Before Initiating Your Request

- ✓ You must be registered for an exam administration in order to submit a request for accommodation
- ✓ You must adhere to the published deadlines for submitting a request with the required documentation
- ✓ You must submit your request and receive a decision on your request from CFA Institute before you can schedule your exam appointment.
- ✓ You must provide the required documentation with your request
- ✓ We encourage you to review the Frequently Asked Questions
- ✗ We cannot accept nor review requests or documentation submitted via email. All documentation must be submitted through the secure online portal.

Pre-Approved Permissible Items

The items provided in [Prometric's Pre-Approved Personal Items](#) list do not require submission of an accommodation or comfort request. They will be allowed in the testing room upon visual inspection by the Test Center Administrator or Remote Proctored staff. Visual inspection will be done by examining the item without directly touching it and without asking the candidate to remove the item, unless otherwise stated.

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. 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 [CFA® Program](#) & [CIPM® Program](#) Disability Accommodations webpages for the appropriate deadline associated with your exam registration.

Certificate in ESG Investing

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

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

Comfort Requests

Some candidates without documented disabilities may need special arrangements to be able to comfortably take the exam. Items that are on [Prometric's Pre-Approved Personal Items](#) list do not require approval by CFA Institute to bring to your exam appointment. If you require a special arrangement not on the approved personal item list, you may contact examadmin@cfainstitute.org, including arrangements for nursing parents.

Comfort requests are considered on a case-by-case basis and are subject to test center and/or appointment availability. As such, we cannot guarantee that your request will be approved. We strongly encourage you to submit your request as soon as possible.

Diabetic Care

Most accommodations for diabetic candidates do not require a formal accommodation request. Medical devices or aids such as a glucose monitor and glucose tablets are [pre-approved permissible items](#).

- 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.

*Effective 1 May 2023 candidates are permitted to bring water into the testing room during their exam. No other beverages are permitted. Water must be in a clear or transparent container with a lid or cap. All labels must be removed, and the container will be inspected for notes or other test aids. The candidate will need to remove the lid/cap for visual inspection by the Test Center staff.

Should the container not meet the requirements outlined, the candidate will be required to put it in their locker and will not be allowed to take it into the test room. Please note that with the implementation of this change, as of 1 May 2023 candidates will no longer require testing accommodations for water in the test room.

Returning & Deferred Candidates

Recurring requests for accommodation

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Candidates with a previously approved CFA Institute testing accommodation on a proctored exam are still required to submit a Disability Accommodations Request Form for each administration.*

- If you are requesting the same accommodation as you received on a previous CFA proctored exam, no documentation is required.*
- If you would like to change or add to your accommodation, you must submit the Disability Accommodation Request Form along with new documentation** that supports your updated request.

*This requirement still applies if you have deferred to another exam administration window, as any approved requests do not automatically transfer to the next administration. You are responsible for submitting the online request form each time you register for an exam.

**If it has been more than seven years since you last sat for a CFA Institute exam, you will be required to submit new medical and supporting documentation regardless of your previously approved CFA Institute accommodations.

Documentation Requirements

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What to Submit:

- ✓ All documentation must be submitted in English
- ✓ The Comprehensive Diagnostic Evaluation Report should have been conducted within the past three (3) years.*
- ✓ All of the required documentation must be submitted within ten (10) business days of submitting the Disability Accommodations Request Form, but no later than the applicable deadline.

*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.

What NOT to Submit:

- Documentation in a language other than English
- Letters from your medical professional in lieu of the evaluation report
 - *Letters are not considered comprehensive and may not be submitted in lieu of this requirement.*
- Multiple copies of the same documentation
- Documentation of requests for accommodation with other institutions or organizations.
 - *If you have received prior accommodation with another entity, please only submit proof of the accommodation you were **granted** by that entity.*
- Documents via email. All documentation must be submitted through the secure online portal.
- Documents that are protected
- Self-reports
- Research articles

A documented diagnosis alone is not enough to assess your request. When you apply for accommodation, you must provide documentation indicating and supporting your current level of impairment within an academic setting or testing environment. Before initiating your request, please use the resources below to help you understand the materials necessary for submission and review.

You must submit the following documentation:

1 Medical Professional Questionnaire & Personal Statement

This Medical Professional Questionnaire form must be completed and signed by a qualified medical professional and returned to us. You must 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 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

You will need to submit your most recent evaluation report, with DSM-V code referenced (if applicable), which should be three years old or less. The evaluation report should be conducted by a qualified professional with expertise in the disability for which the accommodation is sought. Letters from your medical professional are not considered comprehensive and may not be submitted in lieu of this requirement.

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.

Guidelines for the 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.

Accommodation Request Process

CFA Institute Proctored Exams

1 Submit Online Request Form

Registered candidates who would like to request accommodation on their exam for a documented disability must submit a formal request via the [Disability Accommodation Request Form \(log-in required\)](#) with the required documentation. After you have submitted your request, you can [view the status and details of your request](#) online (log-in required).

When submitting your preferred testing location in the online form, you must provide a location from this list of [test center locations](#).

2 Receive Decision (4-6 Weeks)

Please allow four (4) to six (6) weeks for the review and processing of your request. All accommodation requests and supporting medical documentation are carefully reviewed by exam administration personnel, and then forwarded to one or more external medical experts for their review and feedback. 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. When attempting to schedule an appointment with Prometric, you must select a location from this list of [test center locations](#).

Some testing accommodations are not able to be scheduled through the online ProScheduler. In these cases, you will be instructed to contact

Prometric's Testing Accommodations team directly. A member of the Prometric team will work 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.

Please also note we are unable to administer the CFA Program or CIPM Program exams remotely.

Frequently Asked Questions

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What items are permissible to bring to my exam appointment?

CFA Institute makes every possible effort to accommodate candidates. You may reference Prometric's [Permissible Items](#) web page for a list of personal items that you may wish to bring with you, for your comfort, to your exam appointment. Please note for devices with external communication capability such as cellular, wireless, Bluetooth, etc., you will not be able to have your cell phone in the testing lab.

What documentation must I submit for my accommodation request to be reviewed?

A documented diagnosis alone is not enough to assess your request. In addition to the [Disability Accommodations Request Form \(log-in required\)](#), You must submit the following documentation:

- Most recent [Comprehensive Diagnostic Evaluation Report](#) with DSM-V code referenced (if applicable)
- Proof of prior testing accommodations, special educational services, or plans
- Medical Professional Questionnaire
- [Personal Statement](#) that addresses the impact of your diagnosis and why the accommodations sought are necessary

Your disability status and medical documents are treated as confidential. This is described in greater detail in the CFA Institute Privacy Policy. Various internal and external consultants assist in reviewing accommodation requests and are subject to strict confidentiality requirements.

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 the CFA exam, 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.

Do I need to provide a translation of non-English documents?

All documentation submitted must be in English. In order for your request to be reviewed, a word-for-word English translation must be submitted, along with the original documentation for our validation.

I was previously approved for accommodations for a CFA Institute Exam – do I need to re-apply?

Yes. Returning and deferred candidates must submit a request for testing accommodation each time they register for an exam. Approved requests do not automatically transfer to the next administration. You are responsible for submitting the online request form each time you register for an exam. If you are requesting the same accommodations that we have provided in the past, please complete and submit the [Disability Accommodations Request Form](#) by the published deadline. No additional documentation is required. We will confirm when your current exam registration has been updated to include your accommodations previously granted on a CFA Institute Exam.

If you plan to alter your previously granted request in any way, then your request must be reviewed again in its entirety. You must upload the [Disability Accommodations Request Form](#), the [Medical Professional Questionnaire](#), a [Comprehensive Evaluation Diagnostic Report](#), [Personal Statement](#), and [Supporting Documentation](#). You must provide additional documentation that has not been previously reviewed and that supports any changes or additional requests.

Is there a deadline to submit documentation for accommodations requests?

Yes. Please see the [CFA Program](#), [CIPM](#), or [Certificate in ESG Investing](#) Disability Accommodations webpages for published deadlines. We encourage candidates to submit accommodation requests well in advance of the deadline if possible. Every effort will be made to respond to your request within 4-6 weeks of its receipt. However, the process may take longer, especially if all documents are not submitted with the accommodations request form or if additional documentation is needed pending review.

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 about your request, we will provide you with information on how to schedule your exam appointment.

What accommodations are offered?

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

Do I need to submit a Disability Accommodations Request for a wheelchair?

In order 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.

Who do I contact for questions regarding disability accommodations or follow up regarding my accommodations request?

Contact Exam Administration for questions or additional information regarding the disability accommodations process. All inquiries must be submitted by email. CFA Institute cannot give any applicant an unfair advantage in the disability accommodations process by accepting an offer to confer with the applicant directly as well as his or her medical health professional over the phone.

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.

What if more information is needed to support my request?

You will be notified in writing if additional documentation is required. It is your responsibility to provide all necessary documentation by the stated deadlines when completing and submitting an Accommodation Request Form.

Why did I not receive the exact accommodations I requested?

If you are disabled, you are entitled to reasonable and appropriate accommodations that enable equitable access to a CFA Institute Exam. Your requested accommodations will be considered, but you might not receive your preferred accommodations.

I have been approved for testing accommodations but I do not see any appointment availability online and/or I have been told by Prometric there is no availability in my preferred location?

You may not be able to self-schedule your exam appointment online due to your approved accommodations. Please contact the Prometric Testing Accommodations team directly to assist in scheduling your exam appointment.

If you have contacted the Prometric Testing Accommodations team and were told there was no availability, please email examadmin@cfainstitute.org and we may be able to assist.

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.