# NOVEMBER 2020 EXAMS UPDATE

Updated October 28, 2020

FP Canada™ continues to monitor the ongoing COVID-19 pandemic and is following the advice of health experts and governments. We take the health and safety of our employees, volunteers, exam candidates, certificants, stakeholders and all seriously. With this in mind, we've made some key decisions on the upcoming November 2020 exams.

**New format**: FP Canada is offering a new online proctoring option for candidates writing the CFP® exam and QAFP™ exam this November. This option provides candidates with flexibility and convenience, and ensures all candidates have access to write the certification exams. Candidates have the option to continue with the traditional in-person exam test centre experience or to write the exam in an online proctored format from their home or other private location, providing a secure alternative to traditional test centres.

**New dates:** The QAFP exam will now take place on November 23, 2020 and the CFP exam will now be held on three days: November 24, 25 and 26, 2020.

If you still have questions after reviewing this document or need help planning your next steps, we're here to help. Reach out to us at info@fpcanada.ca or leave a voice message at 416.593.8587 or 1.800.305.9886.

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QAFP        CFP

# General

## How will the exams be administered?

The QAFP exam and the CFP exam will continue to be computer-based tests offered at both in-person test centres where available, and via online proctoring. FP Canada's test administration partner, Yardstick Assessment Strategies, will continue to administer the exams, with Yardstick's ProctorU division administering the online proctored exams.

## Why is FP Canada moving to this new format? Is this only for the November 2020 exams?

FP Canada is offering this option in response to the COVID-19 pandemic and the resulting restrictions on travel and gatherings and to offer candidates more choice. This format will allow candidates to write the November 2020 exams even in the event that some test centres are closed or have reduced capacity. FP Canada has not yet determined if this will be a permanent administration option.

## What does "online proctoring" mean? Is this a common approach?

Online proctoring allows candidates to take an exam from the comfort of their home or another private space, rather than at an in-person test centre. Candidates must meet specific technology requirements to be able to participate in this method – see Technical Requirements below. The exam administration is remotely monitored by an exam proctor, who is connected to the candidate's environment for the entire exam and monitors candidates through video. Technology advancements over the past several years have made online proctoring a common and appropriate option for many exams.

## What health protocols will be in place at in-person test centres?

The health and safety of candidates is of utmost importance to FP Canada. If you are unwell or required to self-isolate, do **not** attend an in-person test centre. FP Canada expects exam centres to monitor and comply with local, provincial and/or federal requirements for physical distancing, group sizes and other relevant restrictions. Test centres may have specific requirements, and these will be communicated to candidates on their Admission Ticket.

# Existing Exam Registrants

## I am registered for the November 2020 CFP exam or QAFP exam. What do I do now?

Your registration for the November 2020 exam is still active. Candidates registered as of August 5, 2020 at 5:00pm ET have been sent an email with instructions on completing a short application form to select an exam date (for the CFP exam), confirm primary and secondary exam centre locations, or switch to an online proctored exam format. Candidates who request an online proctored exam will be sent additional instructions regarding registration, once they submit this application.

## I'm not comfortable writing my exam at an in-person test centre, or through online proctoring. Can I postpone to 2021 or withdraw and receive a full refund of the exam fee?

You may withdraw your November 2020 exam registration without penalty until September 29, 2020, or you may contact FP Canada to postpone, at no cost to you, your registration to the May 2021 administration. All requests must be received by September 29, 2020; the regular postponement fee and schedule will apply thereafter. Refer to the FP Canada Fee Schedule for more information.

## I already postponed my registration to June 2020 (and it was then moved to November 2020) – can I still postpone the exam?

Yes, if you previously postponed your registration to June 2020 and it was then moved to November 2020, FP Canada will permit you to postpone to May 2021 as long as your education and qualifications remain current for the May 2021 exam. All requests must be received by September 29, 2020. If your education or other qualifications expire prior to May 2021, you will need to meet eligibility requirements for May 2021.

# Online Proctored Exam Overview

## How will the online-proctored exam be administered?

After registering for the exam, candidates who choose the online proctoring option will be sent additional details on setting up an account to access online proctoring. Candidates will be required to book an exam time and, on exam day, log in to access their exam. Candidates will participate in an onboarding process, and then engage with the proctor who will monitor the exam administration. The online proctored exam will be otherwise administered in the same way as the in-person exam. Refer to the *Guide to the QAFP Examination* or *Guide to the CFP Examination* for more information.

## Will I have a proctor assigned to me for the exam? If so, what is the proctor assigned to me responsible for?

Yes, you will have a live proctor assigned to you for the exam. The proctor is responsible to:

- Greet and authenticate the candidate
- Explain and/or confirm with the candidate the exam name and rules
- Secure the testing environment (physical and virtual)
- Identify unpermitted resources and have them removed
- Troubleshoot and solve technical issues as needed
- Unlock access to the exam
- Watch the candidate throughout the session
- Investigate, notate, and stop suspicious and cheating behaviour
- Assist and/or verify exam submission
- Provide reminders for timing, breaks, etc.

# Exam Registration and Future Rescheduling

## How do I register for the November exam?

Login to online.fpcanada.ca and follow the steps to complete the QAFP exam or CFP exam registration application.

## What are the differences between writing in person versus online proctoring?

| In-person exam | Online proctored exam |
|---|---|
| Same exam delivery software computer program ||
| Equal exam writing time ||
| In-person exam proctors | Remote online exam proctor |
| Secure, public exam test centre | Candidate's home or other private location with a secure internet connection |
| Hardware provided by test centre | Hardware provided by exam candidate |

## How do I select a date and start time for my online proctored exam?

Once you have submitted your application requesting an online proctored exam, you will receive an email from Yardstick (testingsupport@getyardstick.com) prompting you to create a password and log in to Yardstick's platform using your FP Canada ID number. Once logged in, you will be able to book the start time for your selected exam day. Exam times are in 10 minute increments, and FP Canada encourages candidates to select times between 6:00 a.m. and 4:00 p.m. Eastern. Exam time includes onboarding, exam writing and break(s). This video provides an overview of the registration process.

## Is there a risk that there will not be enough spaces for the online proctored exams?

FP Canada is working closely with our test administration providers to ensure sufficient time slots for candidates who wish to write the QAFP exam and CFP exam via online proctoring. The three-day window for the CFP exam increases options for candidates and provides flexibility.

## Who makes the choice in how I write the exam? What if I want to write in person and there isn't a location nearby?

FP Canada is providing options which allow the candidate to make the choice of exam administration for themselves. FP Canada expects exam centres to monitor and comply with local, provincial and/or federal requirements for physical distancing, group sizes and other relevant restrictions. As a result of restrictions in your area, and possibly other factors, all test centres may not be available. If a candidate does not have access to a local centre and cannot write the exam via online proctoring, they can defer their exam writing to our next scheduled sitting in May 2021 in accordance with our postponement schedule.

## There are no in-person exam centres in my area due to COVID-19. Will you be offering in-person exams at all of your usual centres in 2021?

FP Canada expects exam centres to monitor and comply with local, provincial and/or federal requirements for physical distancing, group sizes and other relevant restrictions. As a result of restrictions in your area, and possibly other factors, all test centres may not be available.

## What happens if I need to reschedule the online proctored exam?

To reschedule your exam, you can log in to Yardstick's platform and adjust your selected time until the registration deadline on October 27, 2020.

## If I select to write at an in-person test centre and want to switch to online proctoring, or if I want to switch from online proctoring to in-person, by when can I make the change?

Candidates can make changes to their exam preferences while registration is open. For the November certification exams, registration is open until October 27, 2020. To switch from an in-person test centre to online proctored, login to your FP Canada account at online.fpcanada.ca. To switch from online proctoring to in-person, contact FP Canada at info@fpcanada.ca or leave a voice message at 416.593.8587 or 1.800.305.9886.

## I registered for an in-person exam. What if my exam location is no longer available? How will I be notified of the change?

If your selected exam location becomes unavailable, FP Canada will attempt to secure you in your second choice of location or will notify you and will recommend you select a different location or choose online proctoring. Candidates will be directed to a short exam change application to either select new primary and backup exam centre locations or switch to the online proctored exam format. Candidates who request an online proctored exam will be sent additional registration instructions once they submit that application.

## What happens if I register for the in-person November exam and am required to self-isolate?

FP Canada takes the health and safety of all exam candidates seriously. If you are unwell and/or are required to self-isolate, do **NOT** attend an in-person test centre. Prior to the exam registration deadline – October 27, 2020 – you may login to online.fpcanada.ca and complete a short application to switch to a remote proctored exam format. If you cannot write the exam remotely, you may choose to withdraw from the exam or postpone to the May 2021 exam administration.

## NEW: My province has not required the renewal of identifications since the pandemic started, and the identification that I was planning to use for the exam is expired. Can I still use this identification to prove my identify for my exam in November?

Yes. Appropriate government issued identification with an expiry date from February 2020 to the exam day will be accepted as appropriate identification for FP Canada's November 2020 certification exams.

# Online Proctored Exam Process and Technical Requirements

## What are the system requirements to participate in the online proctored exam?

Candidates must meet the following technical requirements to participate in online proctoring:

| Type | Minimum | Recommended |
|------|---------|-------------|
| Web Camera | 640 x 480 resolution | 1280 x 720 resolution |
| PC User | Windows Vista | Windows 10 (10 S mode is not supported) |
| Mac User | OS X 10.5 or higher | OS X 10.13 High Sierra |
| Internet Download Speed | .768 Mbps | 1.5 Mbps |
| Internet Upload Speed | .384 Mbps | 5 Mbps |
| RAM | 1024 MB | 2 GB |
| Ports | 1935, 843, 80, 443, 61613, UDP/TCP | 1935, 843, 80, 443, 61613, UDP/TCP |

- Compatible browser: Google Chrome (preferred) or Mozilla Firefox. Ensure you have the latest version of Chrome or Firefox to run testing, and for exam day. You'll also need the ProctorU browser extension which we recommend you download before completing the mandatory system check

|  |  |
|--|--|
| Download Chrome | Download the ProctorU Chrome Extension |
| Download Firefox | Download the ProctorU Firefox Extension |

- Operating System: ensure your computer's operating system is compatible with the exam day requirements
- Functioning microphone (most computers and some web cameras have them built-in)
- Six-foot (minimum) extension cord: to allow flexibility in the placement of the computer and camera if the proctor determines that these items must be moved
- Monitor: the online proctoring system supports the use of one monitor only. If you are using a laptop computer, no secondary monitors can be connected

## How do I prepare to log in for the online proctored exam?

Candidates participating in online proctoring must complete all system checks, using the computer and internet connection that they plan to use on exam day, before the close of exam registration on October 27, 2020. We encourage candidates to also complete this check just before exam day as well to verify the connection.

## Where can I test my system for the online proctor requirements?

Test your computer's capability in advance by conducting a check on the computer you will be using on exam day. This system check is available through the Yardstick platform once you have registered for online proctoring. Ensure you are using the computer and connection you will be using on exam day.

Test your internet connection with the computer, internet connection and the location from which you will be writing your exam to ensure a speed of at least 5 Mbps or higher is available. Anything lower than 5 Mbps will not ensure optimal performance during the exam. You are recommended to find a better internet connection prior to the beginning of your exam, and we encourage a wired connection. You can test your connection speed using one of the following sites:

http://speedtest.googlefiber.net

http://beta.speedtest.net

https://fast.com

Before connecting to a live proctor, ensure that your browser & popup blocker is disabled by following this help link: https://support.google.com/chrome/answer/95472?co=GENIE.Platform%3DDesktop&hl=en

## What do I do if I encounter technical issues with the ProctorU Platform?

Contact ProctorU for assistance using one of the methods below:
- Phone: 1-855-772-8678, Option 1
- Support prior to connection time: send a ticket for support
- Support during connection time: Live Chat support available to candidates
Hours of operation: 24 hours a day, 7 days a week

## I want to write via online proctoring, but my computer and related hardware do not meet the requirements. What are my options?

Candidates are responsible for meeting the technology requirements to write the exam via online proctoring, and there are no exceptions for these requirements. Candidates who do not meet the requirements have the option to secure the appropriate equipment, write at an in-person test centre or register for a future exam sitting.

## I don't have a computer with a camera and want to participate in online proctoring. Will you supply a camera or other system hardware?

No. Candidates will be responsible for meeting technical requirements for online proctoring, which includes having a functioning camera.

## Can I use a second screen/laptop to view the questions and answers simultaneously?

No; multiple screens are not supported. The options for candidates are to use a laptop computer and use the screen within the laptop or use a desktop computer with a separate monitor. Candidates who use two (or more) monitors will have to remove the second monitor.

## My living situation does not afford me total privacy for the duration of the exam, can I still write the QAFP exam or CFP exam via online proctoring?

Candidates are required to ensure that their environment meets the requirements set by FP Canada. If an in-person test centre is not an option for the candidate, they may need to look for an alternate private location from which to write the exam or choose to register for an exam in 2021, when an in-person environment may be more feasible.

# Candidate Privacy – Online Proctored Exam

## How much personal information do you share with the online provider?

Candidates who select to write their exam via online proctoring will have their name and preferred email address communicated to Yardstick so that an outreach can be made to set up the user account for the exam. Candidates writing the exam via online proctoring will also have their identification photographed, exam room scanned by the proctor, and exam session recorded. Candidates should familiarize themselves with FP Canada's, Yardstick's and ProctorU's privacy policies.

## Is my online proctored exam experience recorded?

Yes. Recordings are made through the webcam, microphone and of the actual exam on screen through the ProctorU interface.

## Why am I required to show the proctor the inside of my home?

Candidates are responsible for creating a test environment that meets FP Canada's requirements. A room scan is necessary to confirm that the test environment meets FP Canada's requirements.

## Will the proctor be able to access my personal computer files and documents without my knowledge?

- ProctorU proctors cannot secretly access your computer files. With your permission, proctors have the ability to view your screen and utilize the mouse and keyboard as if they were sitting next to you.
- Once the exam starts, the proctor will monitor everything on the screen, but can no longer use your mouse and keyboard. During the entire process, a chat box is running, and you can see what permissions the proctor currently has at any time.
- The entire chat is saved, including a record of what actions the proctor took while accessing your computer.

# Exam Security

## How will FP Canada ensure that all candidates are using appropriate materials, i.e. scrap paper, approved calculator, no external resources, etc.?

Candidates in all testing environments are limited in the materials that they have at their workstation. For online proctoring, candidates will be required to show their work room and test environment to the proctor at the beginning of the exam session and when requested during the exam session.

## Will I receive a paper copy of materials for the exam?

No. All materials for the exam will be presented on the computer including formulas, acronyms, exam case studies and questions.

## Will I be able to access other resources on my computer or websites during the online proctored exam?

No. Using the ProctorU interface for online proctoring will lock down your browsers and ability to access other materials on your computer.

## How will you ensure that someone doesn't "Google" their answers or email/text a friend during the online proctored exam?

The online proctoring platform locks down users' computers and prevents candidates from accessing other materials on their computer. All candidates attest to abide by the terms and conditions included in the Guide to the Exam for their respective exam. Candidate conduct is monitored, and any suspected exam misconduct activities are reviewed and investigated in accordance with the *Disciplinary Rules and Procedures for Exam Misconduct* (DPEM).

# Exam Day

## What items are permissible in my exam room and space (including during the break)?

Candidates in all testing environments are restricted in the materials that they have at their workstation. Candidates should only have the following materials at their workstation:

- Admission ticket
- Approved calculator
- Blank scrap paper
- Pen and pencil
- Eraser
- FP Canada approved identification

For candidates writing via online proctoring, note paper must be removed, and walls must generally be clear from notes or other materials that could prove beneficial during an exam writing.

## Can I have spare paper near me for calculations?

Yes. Candidates will be permitted to use blank scrap paper. At in-person test centres the scrap paper will be collected, and during online proctoring the candidate will be required to notify of the proctor of the scrap paper and have the proctor witness tearing it up at the end of the exam.

# Exam Day – Online Proctored Option

## What is the exam day process for online proctoring?

Ensure your computer is prepared 30 minutes prior to the scheduled connection time to reduce potential connection issues. This video demonstrates the secure check-in process.
- Connect to the proctor at the scheduled connection time. If you attempt to connect sooner than that, you will see a countdown timer displaying the amount of time remaining until your appointment.
- Approximately 15 minutes before your exam appointment, you will be required to log in to your account at https://fpcanada.ysasecure.com/login and click on the 'Exams' tab
- At the scheduled connection time, your examination status will change from "Status" to "Launch". Click this to connect to the proctoring interface
- At this time, you will be connected to a virtual/online proctor who will walk you through the registration process
- You will be required to show your identification and pan the examination room (ensure your camera is small and lightweight so you can move this around your working station)
- Once the registration process is complete and satisfactory, you will be permitted to access and begin your assessment. **NOTE:** your exam timer does **not** start until you have started the assessment. Registration time does not count towards your assessment time

## What should I do before I connect with the online proctor on Exam Day?

- With the exception of the exam website, close all other programs and applications
- Ensure that your webcam is installed and turned on
- Download the ProctorU extension for either Chrome or Firefox
- Install the personalized plug-in program upon connection to a proctor (this is not available in advance). It is essential you confirm that your computer can install programs in advance of exam day
- Have your government-issued photo identification ready to show the proctor. The identification must be valid (not expired) and include your signature. Refer to the respective Exam Guide for a list of acceptable identifications.
- Ensure that you have only one monitor connected to your computer during the assessment. If you use more than one monitor, disconnect it and make sure that it is facing away from you.
- Clear your workstation of any non-approved materials.
- Test your internet connection at the location you intend to write your exam to ensure the recommended speed of at least 5 Mbps or higher is available. Anything lower than 5 Mbps will not ensure optimal performance during the exam and it is recommended to meet a speed of 5 Mbps for the exam. You can test your connection speed using one of the following sites:
    http://speedtest.googlefiber.net
    http://beta.speedtest.net
    https://fast.com

## Can I communicate with the proctor during the exam?

Candidates can either speak out loud to be heard by the proctor, or they may chat with them using the chat function. These communication methods are available throughout the exam session. Other than communicating with the proctor, candidates must remain silent throughout the exam.

## If the pre-exam check-in takes longer than the time allotted, will I lose exam writing time?

No. FP Canada allots 15 minutes for the onboarding process, and that process may take more or less time. Note that there may be a wait-time for an onboarding associate. During busy times, the wait-time to connect to an onboarding associate may be extended to 20 to 30 minutes. Candidates should stay connected should a delay occur – any onboarding delay will **not** impact the time allocated for to write the exam writing.

## If I lose connectivity for any portion of the exam, will I lose time?

No. If your internet connection breaks, ProctorU will be aware of that break and your exam time will pause and restart when you reconnect.

## Are bathroom breaks permitted during the online exam?

No. The QAFP exam will be offered in two two-hour sessions. There will be a 15-minute break between the two sessions during which candidates can use the restroom. The CFP exam will be offered in three two-hour sessions with a 15-minute break between sessions during which candidates can use the restroom.