



Institute
and Faculty
of Actuaries

Access Arrangements Policy

November 2019

Access Arrangements Policy

Introduction

The Institute and Faculty of Actuaries (IFoA) is committed to providing a fair and transparent route to achieving their qualifications.

This policy is intended to provide candidates of the IFoA assessments with a formal means for applying for access arrangement for their assessment(s).

This policy applies to all candidates of the IFoA assessment. Where there is discrepancy between this policy and other regulations or handbooks in respect to procedures for access arrangements relating to assessment, this policy takes precedence.

The IFoA aims to:

- Treat all candidates equally and fairly in the process of access arrangement.
- Provide candidates with a consistent experience of the access arrangement process.
- Fulfil its commitment to delivering a seamless candidate service.
- Deal with any requests in a timely manner and keep candidates informed of the progress of their applications.

Definition of Access Arrangements

Access arrangements (or reasonable adjustments) are changes made to exam conditions.

These may be necessary in circumstances where students are experiencing long or short term conditions or regarded as disabled in terms of the Equality Act 2010.

Under the Act, a disability is defined as a physical or mental impairment that has a substantial and long-term adverse effect on a person's ability to carry out normal day-to-day activities, although the IFoA also provides support for candidates with shorter-term conditions. 'Substantial' is more than a minor or trivial effect, for example it takes longer for the individual to carry out a normal day-to-day activity, such as getting dressed. 'Long term' is where the condition has lasted, or is likely to last, 12 months or more.

Adjustments will be considered when the absence of such would otherwise put the candidate at a disadvantage whilst undertaking the assessment. Such adjustments may relate to extra time, use of a computer or enlarged papers for example.

Whether a suggested adjustment is reasonable or not will depend on the circumstances of each individual case. Some factors taken into account include the particular needs of the individual, the requirements of the examination and the nature, extent and cost of the adjustment itself. Supporting documentation from health and educational professionals is therefore required on application.

An adjustment may not be regarded as reasonable if it prejudices the credibility or reliability of the examination process or if it involves excessive cost resources.

A disability can arise from a wide range of impairments which can include, but are not limited to:

- a) Specific learning difficulties (e.g. dyslexia, dyspraxia)
- b) Mental health conditions (e.g. depression, anxiety, panic attacks and phobias)
- c) Mobility difficulties (e.g. wheelchair users)
- d) Sensory impairments (e.g. deafness, hearing and visual impairments)
- e) Autistic spectrum conditions (e.g. Asperger syndrome)
- f) Long-term health issues (e.g. diabetes, arthritis)
- g) Progressive conditions (e.g. motor neurone disease, muscular dystrophy)
- h) Impairments with fluctuations or recurring effects (e.g. epilepsy, rheumatoid arthritis, myalgic encephalitis (ME), chronic fatigue syndrome (CFS))

Submitting an Application

Applications for access arrangements must be completed on the form provided on the website and submitted to the Member Services team. Application forms should be returned before the exam entry closing date.

Where applications are made late, it may not be possible for an arrangement to be granted for the forthcoming exam session due to time constraints. If this is the case candidates will be advised, and may wish, to postpone their exam to the next session in order for the required arrangement(s) to be put in place.

If, after the exam entry closing date a candidate finds that access arrangements are required for a single occasion, e.g. a broken hand or wrist, etc. they should provide an application form and supporting documentation as soon as possible. The IFoA will endeavour to put in place reasonable adjustments, although this cannot be guaranteed. In some cases it may be necessary for the candidate to postpone their exam to a later date.

Candidates must provide documentary evidence with their application. If a candidate is waiting for evidence they should let the Assessment team know when they will provide it, and submit a completed application form. Only supporting documentation written in English can be considered. It is the candidate's responsibility to obtain and submit a verified translation if the original documentation is in another language, whilst adhering to the deadlines.

All applications and supporting documentation is reviewed by the Assessment team at the IFoA. If the documentation provided is not relevant and/or up to date then the Assessment team may request that the candidate obtains and provides additional supporting documentation.

Candidates will receive confirmation that their access arrangements have been put in place for exam(s) they have booked. Candidates must ensure they have received this confirmation before sitting their exam(s).

Please note that all evidence submitted to the IFoA will be subject to the IFoA's data retention schedule for assessments.

Independent Specialist

In some cases it is necessary for the Assessment team to obtain further information regarding a candidate's circumstances to ensure it is understood what access arrangements the candidate requires. This is likely in more complex cases where individuals have multiple conditions that need to be taken into account or where more unusual requests for adjustments are received.

In order to obtain further information the IFoA may consult with an independent specialist **and/or** refer the candidate to a specialist for an assessment. The specialists that the IFoA works with have an understanding of certain disabilities and conditions and an understanding of the IFoA's exam system and the complexities of it. They are able to offer informed advice when putting in place access arrangements. If the IFoA believes that a referral to the specialist is required, then the candidate will be contacted by the Assessment team and provided with further details.

The IFoA recognises that it can be difficult to disclose sensitive, personal information to other parties. As such, please note that all documentation provided in support of an application will be treated sensitively, and will remain confidential to the relevant parties.

Long Term conditions

Some candidates with long-term conditions (where a condition has lasted, or is likely to last, 12 months or more) who have had their access arrangements approved by the Assessment team previously will have the same arrangements put in place for future examinations without a formal application having to be made. Where possible, this process is followed for candidates that meet the following criteria:

1. The candidate's access arrangements have been approved by the Assessment Team
2. The candidate has provided the IFoA with relevant and up to date documentation
3. The candidate's access arrangements can be put in place for more than one exam over a period of time

Shorter-term conditions

Candidates can apply for access arrangements if they are experiencing a short term or unexpected medical condition just before or during the exam period, or have other exceptional circumstances that they feel would benefit from access arrangements. All applications must be supported by up-to-date written evidence in English. Candidates may use the '[Medical information form](#)' found on the website in order to help them collect evidence to support their application.

Changes in a Candidate's condition

Where a candidate's condition is relatively stable, adjustments can be agreed for all assessments sat with the IFoA. However, in some cases, a candidate's condition can fluctuate or worsen over time and they might need different levels of support at different times. The IFoA will therefore need to review the candidate's adjustments and may ask the candidate to provide additional supporting documentation. The IFoA will communicate to candidates how long their access arrangements have been approved for and inform the candidate when their arrangements will require review.

Candidates are still responsible for considering their needs regularly and for contacting the IFoA if they think that any changes need to be made to their access arrangements.

Examination Risk Assessment

In some cases a candidate's condition could severely affect them in an examination, putting them at risk. This may be the case when a candidate has a condition that could result in a flare up or an episode that requires first aid. In these cases candidates should complete the [Examination Risk Assessment form](#) and submit this with their application form and supporting documentation. This form will be kept on record and provided to an exam centre when the individual sits a written examination.

If the individual's access arrangements have been approved for more than one exam session, then the same form will be provided each time they come to sit a written examination. If any information in the form has changed it is the individual's responsibility to inform the IFoA.

Scribes and readers

Where a candidate requires the use of a scribe and/or a reader, the candidate and the scribe/reader must be able to meet the requirements as outlined in the IFoA's [Guidelines for the use of a reader and scribe](#).

It is necessary, wherever possible, that the candidate practice in the use of a scribe and/or reader. As such, if there is not a sufficient amount of time for the candidate to practice working with a scribe/reader before the assessment, it may be necessary for the candidate to postpone their exam to a later date.

In some cases the IFoA may consult with an independent specialist in order to establish whether a scribe/reader is required and who is the most suitable person to fulfil the role.

Mitigating Circumstances

Candidates with access arrangements may also need to apply for Mitigating Circumstances if they experience an unexpected flare up or worsening of their condition close to the assessment and the reasonable adjustments put in place for them were not sufficient to support them.

Candidates may also need to apply for mitigating circumstances due to a previously undiagnosed or recently diagnosed condition where it was not possible for access arrangements to be put in place for their assessment. This will normally only be permitted for the first assessment period after the diagnosis as it is expected that support would be sought for future assessment periods. For further information, please refer to the [Mitigating Circumstances Policy](#).

Pregnancy and Maternity

Pregnancy, maternity and being a carer are protected characteristics under the Equality Act 2010. In accordance with this, reasonable adjustments will be made where possible. Supporting evidence from a medical professional will be required.

Religious Observance and Cultural Traditions

Occasionally candidates are not permitted to sit exams on certain days for religious reasons. In these circumstances, alternative arrangements may be considered. Supporting evidence from a religious leader will be required.

Document control

Controller: Karen Brocklesby, Head of Quality and Assessment

Approving Committee: Education Committee

Date approved: March 2018; Reviewed: November 2019; Next review: November 2020



Institute and Faculty of Actuaries

Beijing

14F China World Office 1 · 1 Jianwai Avenue · Beijing · China 100004
Tel: +86 (10) 6535 0248

Edinburgh

Level 2 · Exchange Crescent · 7 Conference Square · Edinburgh · EH3 8RA
Tel: +44 (0) 131 240 1300 · Fax: +44 (0) 131 240 1313

Hong Kong

1803 Tower One · Lippo Centre · 89 Queensway · Hong Kong
Tel: +852 2147 9418

London (registered office)

7th Floor · Holborn Gate · 326-330 High Holborn · London · WC1V 7PP
Tel: +44 (0) 20 7632 2100 · Fax: +44 (0) 20 7632 2111

Oxford

1st Floor · Park Central · 40/41 Park End Street · Oxford · OX1 1JD
Tel: +44 (0) 1865 268 200 · Fax: +44 (0) 1865 268 211

Singapore

163 Tras Street · #07-05 Lian Huat Building · Singapore 079024
Tel: +65 6717 2955

www.actuaries.org.uk

© 2017 Institute and Faculty of Actuaries