



Institute
and Faculty
of Actuaries

Technology and Environment Policy

September 2026

Technology and Environment Policy

Introduction

This policy sets out the mandatory technology and examination environment requirements for all candidates sitting IFoA examinations, whether in person at an approved examination centre or remotely under Remote Invigilation (RI).

It ensures that all assessments are conducted securely, consistently, and in full compliance with the Institute and Faculty of Actuaries (IFoA's) [Assessment Regulations](#).

This policy applies to all IFoA examinations for candidates registered for the September 2026 examination diet and all subsequent sittings until formally superseded. It must be read in conjunction with the IFoA Assessment Regulations and all subject-specific examination instructions and guidelines.

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1. APPLICABLE TO ALL CANDIDATES

1.1. Smart Technology

Candidates must adhere and follow the guidelines as set out in the [Exam Smart Technology Policy](#).

1.2. Internet usage during examinations

Candidates are strictly limited in the internet usage permitted throughout the entire duration of the examination.

Internet access is permitted only for the following purposes:

- Accessing essential exam materials
- Downloading the exam paper
- Uploading the completed exam script.

Any other use of the internet, including browsing, messaging, or accessing external resources, is prohibited and will be treated as a breach of the [IFoA Assessment Regulations](#).

1.3. Non-Permitted access/usage during the exam

Candidates are **not permitted** to access/use (not an exhaustive list):

Web browsers e.g. Chrome, Edge, Mozilla, Safari etc
Study notes (digital or hardcopy)
Textbooks
Past exam papers
Digital notepads
Translation Software
AI tools, functionality or software
Offline applications which store, process or analyse information beyond permitted tools
Email, instant messaging or other communication applications e.g. telegram, skype, teams etc.

Failure to comply with these requirements constitutes a breach of the [IFoA Assessment Regulations](#) and may result in the attempt being voided with a zero mark and referral to the Inappropriate Conduct process.

1.4. System readiness and exam conditions

From the moment onboarding is completed, or the candidate enters the exam room, full exam conditions apply.

This includes complying with the following:

- Candidates may power on their computer systems and access the examination platform prior to the official start time for system readiness checks.
- Candidates are not permitted to open any other software applications (such as Microsoft Word, Excel, or R) or begin preparing for the exam until instructed by the invigilator or the official start time begins.
- Access to non-permitted applications (including email, messaging platforms, communication tools, or artificial intelligence (AI) tools and services) is strictly prohibited.
- Candidates are not permitted to make notes on scrap paper before the exam start time.

1.5. Single Screen

Candidates are permitted to use the split screen functionality on their device.

1.6. English Only Responses

Candidates must type all responses in English and are not permitted to use translation tools or software.

1.7. Calculations, formulae and symbols

Candidates may use any make or model of **physical calculator**. The use of online calculators is not permitted under any circumstances.

Excel may be used in any examination to support calculations.

Unless the exam instructions specifically state otherwise, candidates must include all calculation steps and/or sufficient formulae to allow examiners to understand and assess how answers have been derived.

When using Excel for calculations:

- Data generated in Excel (or similar software) must be copied and pasted directly into the answer file.
- Screenshots or image captures will be accepted for marking; however, candidates must ensure that all workings are clearly visible, unless instructed otherwise.
- Copied data must not contain any links to external or source files.
- Candidates must not insert or embed an Excel (or similar) sheet into a Word document.

1.8. Application support

Candidates sitting CS examinations may access the help pages within R during the assessment. Further support for the use of R in CS examinations can be found in the following official IFoA guides:

- [Getting Started with R](#)
- [Using R in CS1B and CS2B](#)

Candidates are strongly encouraged to familiarise themselves with these resources in advance of the examination to ensure they are comfortable navigating R and its help functionality under exam conditions.

1.9. Saving your answer submission

Candidates must ensure that their examination work is saved regularly throughout the assessment. The following requirements apply:

- Save your work every 20 minutes.
- You will need to save your file(s) to a folder on your Desktop or another known location.
- You are responsible for saving your exam work frequently and in the correct format. Failure to do so may result in your exam not being marked and will not be accepted as a mitigating circumstance. We recommend avoiding saving your file in a folder that contains other documents.
- Further guidance on saving and uploading your work in our [Examination Handbook Mini Guide](#).

2. IN-PERSON EXAMINATIONS

2.1. Examination Centre Technology Provision

The Examination Centre will provide and maintain the following equipment and software for all candidates. Candidates must use only the equipment provided; personal devices or modifications are **not permitted** unless authorised under approved Access & Inclusion Arrangements.

Standard Centre Set-Up:

Computer	Windows PC or laptop with external QWERTY keyboard and mouse
Display	Single monitor or laptop screen of 17 inches or greater
Web Browser	Google Chrome
Office Suite	Microsoft Office with full versions of Excel and Word
Statistical Software	R Console version 4.5.2 (and above) with all required packages pre-installed RStudio (2025 version and above)
File Management	ZIP archival software

Candidates must not attempt to install, alter, or substitute any software or hardware provided by the Examination Centre. Breaches will be treated as Inappropriate Conduct under [IFoA's Assessment Regulations](#).

2.2. Technical Issues in Examination Centres

Candidates who experience any technical issue (e.g., software or device malfunction) that affects their ability to continue with the examination **must immediately** notify the Examination Invigilator. Invigilators will provide support to resolve the issue promptly and apply mitigation measures where appropriate.

Failure to report technical issues at the time of occurrence may mean the matter cannot be considered later under the [Mitigating Circumstances Policy](#).

2.3. Reporting Issues or Incidents

Candidates who experience any issue or incident during their examination **must** report it promptly to the Examination Invigilator to ensure timely review and maintain exam integrity.

2.3.1. Reporting Procedure:

- **Immediate Notification:** Any issues or incidents must be reported to the Examination Invigilator at the time they occur, wherever possible,

so that they can be addressed promptly and appropriate mitigation measures can be applied. If it is not possible or appropriate to report the issue during the examination, it must be reported before leaving the test centre. This ensures the invigilator is able to submit an incident report to accompany the candidate's own report.

- **Completing an Online Candidate Incident Report Form:** QR code signs will be displayed throughout the test centre. After completing the exam and retrieving your mobile phone from storage, scan one of the codes.

Complete the online form with all required details, ensuring you have submitted your ARN and surname for reference purposes.

If unable to scan the QR code, access the form via the provided link within your submission confirmation email which is sent after your exam upload.

- **Submission:** Incident reports should be submitted within 24 hours of completing the exam. Where this is not feasible, an extension of up to three working days may be permitted.
- **Further Guidance:** Additional information on reporting issues or incidents is available in [Mini Guide 9](#).

This form is not a substitute for a [Mitigating Circumstances application](#). If you believe the issue seriously affected your performance, you must also submit a separate Mitigating Circumstances application. The incident report can support that application with evidence.

3. REMOTE EXAMINATIONS

3.1. Equipment

Candidates sitting remotely are solely responsible for procuring their own equipment, which must comply with the technical specifications imposed by the IFoA.

It is the candidate's responsibility to ensure that all equipment is compliant, correctly configured, tested, and fully operational prior to each examination session. Candidates who do not complete these checks do so at their own risk and may be unable to successfully complete the examination.

3.2. Minimum Technical Requirements

Candidates sitting examinations remotely must ensure that all equipment intended for use on the exam day meets the following minimum hardware and software specifications to ensure they can access the Online Exams Platform and Remote Invigilation system.

Operating System	Windows 10 or later macOS 11.0 or later
Microsoft Office	Office 2019 or later <i>Standard functionality only; text prediction must be turned off</i>
Statistical Software	R Console version 4.5.2 (and above) and RStudio (2025 version and above)
PDF Reader	An application capable of opening PDF documents (e.g., Adobe Reader: http://get.adobe.com/reader/)
Secure Browser:	IFoA-approved secure browser (<i>currently Guardian Browser</i>) – required
Connectivity:	Minimum speed: 3 Mbps upload and download Wi-Fi supported; fixed/wired connection recommended Mobile hotspots and tethering not supported
Hardware Specifications:	<ul style="list-style-type: none">• Webcam: Minimum resolution 640×480• Microphone: All microphones permitted except those built into headphones• Speakers: Built-in or external required• RAM: Minimum 8 GB• CPU: Recommended 4 cores at 2.4 GHz• Monitor: Single monitor only; if using an

	<p>external monitor with a closed laptop, connect directly and set display to duplicate/mirror. Adjust settings to prevent sleep mode.</p> <ul style="list-style-type: none"> • Monitor Resolution: Minimum 1366×768
Additional Requirements:	<ul style="list-style-type: none"> • Ports and software access requirements: see point 3.4 below • Date/Time: Device must be set to local time and timezone for the country of sitting. Do not adjust to UK time. • File Size: Maximum uploadable file size is 100 MB; larger files may fail to upload and may not be marked • ZIP Extraction: Device must support extraction of compressed ZIP folders • VPN/Virtual Desktop: Not supported • Tablets and Mobile Phones: Not supported for exam delivery • Security Software: Candidates must ensure that antivirus, firewall, or other security software is configured so it does not block or interfere with the exam platform or proctoring tools. Required applications may need to be added to trusted or allowed lists prior to the examination.

Failure to meet these requirements may prevent access to the exam platform and could result in the attempt being voided with a zero mark.

3.3. Secure Browser

To access the Online Exams Platform and Remote Invigilation system, candidates **must** install and use the IFoA-approved secure browser (*currently Guardian Browser*). Exams cannot be sat without this browser.

The Guardian Browser must be installed prior to the exam from the following link:

- <https://guardian.measurelearning.com/>

Candidates should verify their equipment meets specifications at:

- <https://go.proctoru.com/testitout>

Important Notes:

- Do not navigate beyond the “test it out” page as other ProctorU guidance may not apply and could cause confusion.
- VPNs and virtual desktops are not supported and must be disabled.
- Guardian Browser does not lock the candidate’s screen to one browser. Candidates may navigate to permitted programs (e.g., Excel, Word) during the exam.

- For CS1B and CS2B exams, candidates may launch R help pages, which will open in the default browser (e.g., Chrome).

Failure to install and use Guardian Browser will result in the candidate being unable to sit the examination, and the attempt will be recorded as a fail.

3.4. Using Corporate or Work Device

Whilst the use of a personal device is strongly recommended to support a more reliable exam experience, a work or corporate device should only be used where it is not possible to use a personal device.

In such cases, the network must allow audio, video, and screen sharing to operate without interference or delay from network security controls.

Where technically possible, these services should be permitted to connect directly to the internet. This helps to:

- Reduce delays
- Maintain clear audio quality
- Ensure stable video and screen sharing

Failure to meet these requirements may result in poor sound quality, frozen or unstable video, or disruption to the exam session.

To ensure a smooth and reliable exam experience, any use of a work or corporate device must be formally approved by the organisation's IT team. The IT department must implement all required network configurations and assumes responsibility for doing so at their risk.

3.4.1. Software Access Requirements

The network must permit downloading of the secure exam browser from the following locations:

- <https://production-archimedes-secure-browser-artifacts.s3.amazonaws.com/latest/windows/guardian-browser-x64.exe>
- <https://production-archimedes-secure-browser-artifacts.s3.amazonaws.com/latest/mac-x64/guardian-browser-x64.dmg>
- <https://production-archimedes-secure-browser-artifacts.s3.amazonaws.com/latest/mac-arm64/guardian-browser-arm64.dmg>

Network controls (e.g. firewalls, web filtering, or endpoint protection) must not block access to these locations.

3.4.2. Required Internet Access (Ports and Connectivity)

The network must support standard web access and real-time communication required for remote invigilation.

This includes:

- Standard and secure web browsing
- Live audio and video streaming
- Screen sharing and monitoring

To enable these services, the following network connections must be permitted from internal devices to the internet:

- **TCP ports:** 80, 443, 843, 1935, 5671
- **TCP/UDP port:** 3478
- **UDP ports:** 49152–65535

Failure to allow these connections may prevent the exam system from functioning correctly.

3.5. Testing Your Equipment

Candidates sitting examinations remotely must complete the following checks before the exam to confirm readiness and reduce the risk of technical issues:

Mandatory Pre-Exam Checks:

- **Test your setup:** Use the same location and equipment intended for the exam (computer, internet connection, peripherals). Confirm compliance with all technical requirements and exam location rules.
- **Verify audio settings:** Ensure your computer's audio settings are correctly configured and functional.
- **Check for blockers:** Review antivirus software and firewall settings to ensure they do not block or interfere with downloading or uploading exam files.
- **Update your secure browser:** Open Guardian Browser the day before the exam to check for updates. Updates will install automatically.
- **Restart device:** Candidates must fully restart their device prior to commencing the examination to ensure optimal performance and to close any unnecessary background processes.
- **Complete your pre-exam testing requirement:** [Completing the mandatory checks on Online Exam Platform](#) - *Proctor Check, Upload Equipment check and Download Equipment check.*

Completing these tests confirms your device meets the required specifications at the time of testing but does not guarantee an error-free exam sitting. Software updates, configuration changes, background process or other automatic system activity may impact the Remote Invigilation system. Candidates remain responsible for ensuring their equipment is fully operational at the time of the exam.

3.6. Equipment and Software Compliance

To ensure the integrity and smooth running of the examination, candidates must adhere to the following requirements regarding device configuration and prohibited programs, including the mandatory actions to be completed before the exam:

3.6.1. Remote-access tools are not permitted during the exam, even if they are legitimate for work purposes. Examples (not exhaustive list) include:

- *WhatsApp Web*
- *AnyDesk*
- *UltraViewer*

3.6.2. Communication, collaboration, and messaging applications (including but not limited to Microsoft Teams, Zoom, Slack, email clients, and similar tools) are to be fully closed prior to starting the examination, as they may interfere with the operation of the proctoring software.

3.6.3. All prohibited or potentially interfering applications are to be fully closed before the examination begins. These applications may prevent the proctoring system from launching or functioning correctly.

3.6.4. Closure of applications is to be verified using Task Manager (Windows) or Activity Monitor (Mac) prior to starting the examination. Please note, some applications such as WhatsApp Web will automatically relaunch after being closed and can interfere with the remote invigilation software, impact your CPU during your exam, therefore disabling the application may be required.

3.6.5. If unsure whether a program may interfere, close it before starting the exam to prevent disruptions or disqualification.

The candidate's screen is recorded throughout the exam. Use of any prohibited program during the assessment will be detected and may constitute a breach of the [IFoA's Assessment Regulations](#). Such cases will be flagged to the IFoA for review and may result in the attempt being voided with a zero mark.

3.7. Environment Criteria

Candidates undertaking examinations via remote delivery are required to do so from a private and secure location. The chosen setting must not be a public, shared, or communal space. The examination environment must be adequately lit, free from interruptions or potential distractions, and must support uninterrupted audio, video, and screen monitoring for the full duration of the assessment.

These conditions are mandatory to ensure adherence to invigilation requirements and to uphold the integrity and security of the examination process.

3.8. Remote Examination Onboarding and Connectivity

Candidates sitting examinations remotely must comply with the following requirements:

Onboarding and Start Times:

- Candidates may begin the onboarding process via the Remote Invigilation system no earlier than 20 minutes prior to the scheduled start time.
- Candidates who start the exam 30 minutes or more after the official start time will be marked absent and receive a zero mark.

Monitoring and Recording:

- The candidate's audio, webcam, and screen will be recorded for the full duration of the exam.
- Candidates must ensure their audio and webcam are turned on and functioning throughout, and they must remain visible on camera at all times unless taking a permitted break or where a pre-approved Access & Inclusion Arrangement applies.

Connectivity Requirements:

- It is the candidate's sole responsibility to maintain a stable and reliable internet connection throughout the examination. Candidates must remain connected to the Remote Invigilation system for the entire exam and until their submission has been successfully uploaded.
- If internet connectivity is lost, candidates must reconnect at the earliest opportunity. Connectivity status is automatically recorded.
- Failure to remain connected may result in the attempt being voided and awarded a zero mark.

3.9. Printing

Remote candidates may print their exam paper under the following conditions:

- Print and retrieve the paper from the vicinity of the exam desk, remaining in view of the camera.
- If printing in another room, retrieve the paper only during one of the two permitted five-minute breaks (not within the first 30 minutes).
- No third party may deliver printed copies.
- No additional time will be provided for printing.



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