



Institute  
and Faculty  
of Actuaries

# Examination Guidelines

**April 2026**

## Introduction

This document is designed to support you to prepare for and sit your exams - whether delivered in person at a test centre or undertaken remotely.

The checklist sets out the steps you must follow before and during your exam, to ensure a smooth exam experience and compliance with [IFoA Assessment Regulations](#), [Technical and Environment Policy](#) and [SMART Technology Policy](#).

This document also lists contact details for support with exam issues during your exam and items permitted in your exam room. It is designed to help you feel confident, well-prepared, and fully aware of what to expect on exam day.

Our priority is to ensure that every candidate can demonstrate their knowledge under conditions that are consistent, secure, and accessible. By following these guidelines carefully, you will help us maintain the integrity of the qualification process and support a smooth and successful exam experience.

To support your exam preparations the IFoA also provides [Mini Guides](#) offering clear, practical instructions for all key exam processes.

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# IFoA Examination Checklist

## Make your booking

- Update your preferred address for communications in the IFoA member portal (or email: [memberservices@actuaries.org.uk](mailto:memberservices@actuaries.org.uk)).
- [Book your exam](#)
  - Please make sure you book during the advertised exam booking period, as we cannot accept late admissions. If your employer or actuarial association books exams for you, please make sure they have your correct contact details.
- Choose your exam location
  - Use the link in your exam booking confirmation email to complete and submit an exam location preference form.
  - If your actuarial Association books exams on your behalf, they will contact you about your exam location.
- Apply for Access Arrangements, if you need changes made to exam conditions because of a long or short-term condition. Application deadlines and further information are available on our [Access Arrangements web page](#).

## After making your booking

- Read the following regulations and policies:
    - [Assessment Regulations](#),
    - [Technology and Environment Policy](#)
    - [Exam Smart Technology Policy](#)
- And any other exam related instructions provided by the IFoA.
- Add key exam email addresses into your safe senders list:
    - [email@notifications.actuaries.org.uk](mailto:email@notifications.actuaries.org.uk)
    - [news@update.actuaries.org.uk](mailto:news@update.actuaries.org.uk)
    - [exams@actuaries.org.uk](mailto:exams@actuaries.org.uk)
    - [alerts@onlinepracticalexams.org.uk](mailto:alerts@onlinepracticalexams.org.uk)
    - [memberservices@actuaries.org.uk](mailto:memberservices@actuaries.org.uk)

- Make sure you have [valid photo ID](#) (*Assessment Regulations, Section 8*).
- If you are sitting a **remotely invigilated exam**, you need to:
  - Check your device meets technical requirements ([Technology and Environment Policy, Section 3.2](#)).
  - Download and test the Guardian Browser ([Technology and Environment Policy, Section 3.3](#)).
  - Test your device is fully functioning ([Technology and Environment Policy, Section 3.4](#)).

## Two weeks before your exam

- Check you are receiving IFoA emails.

If it has changed since you booked your exam, update your preferred address for communications in the IFoA member portal (or email: [memberservices@actuaries.org.uk](mailto:memberservices@actuaries.org.uk)).

- Create and verify your exam platform account. (email from: [alerts@onlinepracticalexams.org.uk](mailto:alerts@onlinepracticalexams.org.uk)). *Need help doing this? Have a look at our [Mini Guides](#) for further support.*
- Review your joining instructions.
- If you are sitting CS1B or CS2B, download the datasets from the exam platform. For additional support in the R exams, please read the R guides available: [Getting started with R](#) and [Using R in CS1B and CS2B](#)
- Check your exam date, time, and location of each exam being taken. You can find the information in your exam booking confirmation and joining instructions.
- If you are sitting an exam ***In-Person at a test centre***, you need to:
  - Plan your travel to the exam centre. (Centre details can be found here: [UK/Ireland](#) and [Outside of the UK/Ireland](#))
- If you are sitting an exam ***remotely***, you need to:
  - Make sure you can sit your exam in a suitable environment.
  - Complete the [pre-exam testing](#) on your equipment.
  - Log in to the platform and complete the proctor, download and upload pre-checks. *Need help doing this? Have a look at our [Mini Guides](#) for further support.*
  - Set your computer to local time.
  - Download the datasets and follow all [instructions for CS1B/CS2B exam](#) (if taking).

## Three working days before your exam (CP3 only)

- Download CP3 pre-exam materials from the platform. *Need help doing this? Have a look at our [Mini Guides](#) for further support.*

## Day before

- Make sure you know your ARN and your password for the exam platform, ready for your exam.
- Make sure you have your valid photo ID ready for your exam.
- Make sure your exam desk or your packed items comply with our guidelines (see full list of permitted items in [Appendix A](#)).
- If you are sitting an exam ***In-Person at a test centre***, you need to:
  - Check for any disruptions on your planned travel route (Centre details can be found here: [UK/Ireland](#) and [Outside of the UK/Ireland](#))
  - Remember to pack your valid photo ID.
- If you are sitting an exam ***remotely***, you need to:
  - Launch your device to check for any updates or potential scheduled updates.
  - Launch Guardian Browser to check for updates.
  - Unpin other browsers from your taskbar.
  - Do a final upload/download test. *Need help doing this? Have a look at our [Mini Guides](#) for further support.*

## Exam day – Before exam starts

- If you are sitting an exam ***In-Person at a test centre***, you need to:
  - Arrive at the centre one hour early (if you attend the wrong centre or arrive more than 30 minutes late, you will not be allowed in).
  - Complete registration, ensuring you show your valid ID, and get assigned your desk
  - Store away any personal or non-permitted items in the designated areas for the duration of your exam.
  - Enter the exam room under full exam conditions. This means you cannot use email, messaging apps, or any other communication tools.
  - Once seated at your desk, organise yourself and check the equipment is functioning properly and you are comfortable.
  - Log on to the exam platform to check everything is working.
  - Do not write notes on scrap paper before the official start time.
  - Do not open other programs (like Word, Excel, or R) or start preparing answers until the invigilator tells you to, or the exam officially begins.
  - Listen to the invigilator announcement.

## Exam day – Before exam starts (continued)

- If you are sitting an exam *remotely*, you need to:
  - Remember to have your valid ID with you and ready for your exam.
  - Turn your computer on and log in to the exam platform early to check everything is working.
  - Check your internet is working and stable.
  - Close any open operating systems or applications which you may receive notifications from including AnyDesk and WhatsApp.
  - Check to see if your device has undergone any overnight updates.
  
- If you are sitting an exam *remotely*, when using the Proctor U test system functionality make sure you are checking the following:
  - That the device CPU usage is optimally between 10% and 30%.
  - That your device memory usage is optimally between 10% and 50%.
  - That your internet connection will not be interrupted, by ensuring no one else in your household is using bandwidth that could impact your connection.
  - Your internet upload and download speed, by using <https://www.speedtest.net/>
  
- If you are sitting an exam *remotely*, you need to:
  - Launch the Guardian Browser and then log on to the exam platform.
  - Complete onboarding steps. You can do this 20 minutes before the exam starts. Once you have completed the steps, keep the proctoring system displayed at the top of your screen.
  - Once you've completed your onboarding steps, you're under full exam conditions. This means you cannot use email, messaging apps, or any other communication tools.
  - Do not write notes on scrap paper before the official start time.
  - Do not open other programs (like Word, Excel, or R) or start preparing answers until the exam officially begins.
  - Ensure that your selected audio, screen, and webcam are active, visible and audible.
  - Disable the Autosave feature to avoid any accidental saving after your exam ends.
  - Move your phone away from your desk.

## Exam day – Start of exam

- Download your exam paper.
- Save your documents and your answer file to the Desktop (not cloud storage).
- Include your ARN in the file name.
- For CM1B, CM2B and CP2 Paper 1 and CP2 Paper 2 will need to download multiple files. Including: a PDF exam paper and Excel workbook answer template. Please be careful and make sure you have downloaded all the required files before starting your exam. *Need help doing this? Have a look at our [Mini Guides](#) for further support.*
- Enable editing on templates (if applicable) and save to your desktop. *Need help doing this? Have a look at our [Mini Guides](#) for further support.*
- Use desktop versions of Word/Excel only.

## Exam day – During the exam

- Save your work at least every 20 minutes.
- If you are sitting an exam **in-person at a test centre**:
  - If you need a bathroom break, raise your hand and let the invigilator know.
  - If you have any problems, make sure you let the invigilator know immediately.
  - Complete an [incident form](#) if any issues that affect your ability to effectively focus on or complete your exam.
- If you are sitting an exam **remotely**:
  - Do not alter your computer time.
  - Make sure your head and shoulders are visible on your webcam throughout.
  - Ensure your camera, screen and audio remain on and unobscured for the duration of your exam.
  - If you need a bathroom break, speak clearly into the webcam before leaving the room.

## Exam day – End of exam

- Preview your exam answer paper before uploading your submission. Once you have uploaded your completed work for marking, no further changes can be made.
- Upload your work within the 30-minute upload window after the exam ends.
- If you are sitting an exam **remotely**, you need to:
  - End your proctoring session.
- If you are sitting an exam **in-person at a test centre**:
  - And you were affected by an incident during your exam, report your issue/incident. *Need help doing this? Have a look at our [Mini Guides](#) for further support.*
- Download a copy of your exam script within the two-week period. *Need help doing this? Have a look at our [Mini Guides](#) for further support.*

## Use of the Formulae and Tables

These guidelines were updated on 27 March to reflect changes in policy regarding the use of hard copies of Formulae and Tables 2025 edition in the April exam session.

All April 2026 exam papers have been written using the newly released [Formulae and Tables 2025 edition](#) (the “red book”).

The following arrangements for the use of *Formulae and Tables* will apply for the April 2026 exam session.

1. All candidates sitting exams in April 2026 will have access a full electronic version of the Formulae and Tables 2025 edition on the online exam platform.
2. All candidates may bring you may bring a **minimally annotated, but ideally clean copy** of the *Formulae and Tables* 2025 edition into the exam room.

Please note that the only version of the *Formulae and Tables* book permitted in the exam room is the [Formulae and Tables 2025 edition](#). No other editions or versions will be accepted. Printed or XEROX copies or self-bound versions will not be permitted.

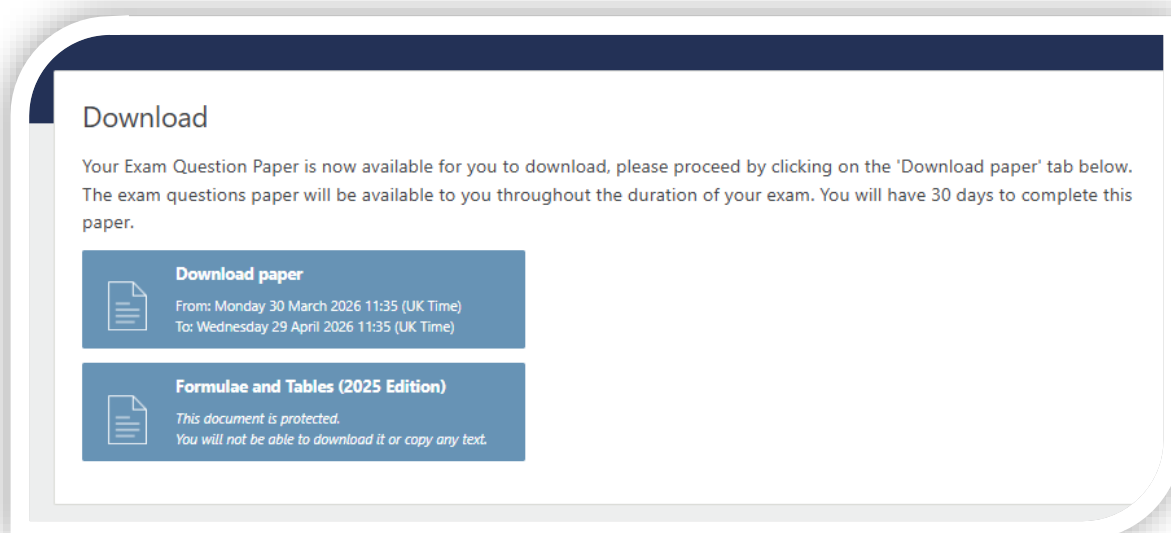
# Accessing the Formulae and Tables (2025 Edition)

*This section was updated on 31 March 2026 to provide clarified guidance on accessing the electronic Formulae and Tables (2025 Edition) during the April exam session.*

The Formulae and Tables (2025 Edition) will be available electronically on the exam platform on the day of your exam **only**.

## How to Access Them



1. It will be available when the exam paper becomes accessible.
2. Select the protected version of the Formulae and Tables (2025 Edition).



## Important Information

- The protected document cannot be downloaded onto your device.
- You will not be able to copy or paste any text from it.
- You can view the document on screen for the duration of your exam.

## Support and contact information

<b>Contacting the IFoA</b>	<p>We are available to assist with:</p> <ul style="list-style-type: none"><li>• Issues related to the exam platform</li><li>• Downloading or uploading your exam paper</li><li>• General exam-related queries</li></ul> <p><b>Please note:</b></p> <p>If you experience issues during your upload window, you must call us (based in the UK) for guidance. International candidates must ensure they can call a UK phone number.</p> <p>The team cannot provide technical support for your personal equipment or internet connection.</p> <p>Emailed exam answer submissions are not accepted unless you have prior authorisation from us.</p> <p>Contact Details:</p> <p> Email: <a href="mailto:exams@actuaries.org.uk">exams@actuaries.org.uk</a></p> <p> Phone: +44 (0)1865 268 873</p>
<b>Support for Guardian Browser and ProctorU</b>	<p>If you encounter issues with the Guardian Browser or have trouble connecting to or completing steps within ProctorU: please use the 'Support' chat feature:</p> <p>Open the chat via the Guardian Browser, or go directly to:</p> <p><a href="https://auto.proctoru.com/chat/">https://auto.proctoru.com/chat/</a></p> <p>Type "Agent" in the message box to be connected with a support team member.</p>

## **APPENDIX A – Permitted and Non-Permitted examination room items**

This list details the items candidates are permitted to bring into the exam room, as well as those that are not permitted. The list of permitted items is not an exhaustive list, if anything is not included, candidates should assume that it is not permitted. The only exception to this rule is candidates with Access and Inclusion Arrangements which have been pre-approved by the IFoA.

### **Items permitted in the examination room:**

- Photographic identification.
- One sheet of paper containing candidate's username and password for the examination platform, and their registered email address for support purposes.
- Candidates sitting remotely are permitted a maximum of two sheets of blank A4 paper AND one A4 non-digital wipeable board.
- A pencil and/or a pen, ruler and eraser – these must be brought in a clear pencil case only.
- A calculator of any make or model (Calculators on mobile devices or online platforms are not permitted.)
- For CP3, Candidates can bring a printed copy of the pre-examination advanced materials, which can be annotated. Annotations can be made on the advanced materials only.
- Beverages are permitted; however:
  - In-person candidates at an Examination Centre may bring only a cold beverage in a sealable bottle. Manufacturer labels are allowed, but no additional labels or markings are permitted.
  - Remote Candidates may have either a hot or cold drink, with no specific restrictions.
- Small snacks are permitted; however:
  - Candidates in-person at an Examination Centre must ensure their snacks do not contain nuts, or cause disruption with strong smells, mess, or noisy packaging.
  - Candidates sitting remotely must ensure their snacks do not cause disruption to the exam; noisy packaging may impact the quality of the audio recording.

- In-person candidates at an Examination Centre may bring a pair of non-electronic earplugs or ear defenders, which will be checked by the examination invigilator.
- A nose or mouth covering is permitted; however, it must be removed when the candidate's photographic identification is being checked.
- Religious headwear is permitted - please apply for an Access and Inclusion Arrangement if all or part of your facial features will be covered during the identity verification.
- Hand sanitizer or antibacterial wipes.
- A cardigan/jumper, to be worn or placed on the back of the chair or under the desk.
- Any permitted [Comfort Aid](#).
- Medication and specialist medical equipment, as agreed with IFoA as part of an Access and Inclusion Arrangement.

**Items not permitted in the examination room:**

- No watches, smartwatches, clocks, mobile phones, iPods, tablets and/or electronic devices of any kind are permitted on a candidate in the examination room ([Exam Smart Technology Policy](#)). These items must be switched off and stored securely with the candidate's personal belongings in the designated storage area or secure location.
- No coats, jackets, hoodies, and other outerwear such as hats, caps and scarfs.
- No study text, revision cards, course notes, textbooks or past papers.
- No electronic or digital headphones or Bluetooth earpieces (e.g. AirPods, noise-cancelling headphones).
- No form of digital, electronic, recording, programmable or technological / web enabled equipment.
- No other documents, including notebooks, dictionaries, language dictionaries etc.
- No computer devices other than those being provided by the examination centre.
- Items deemed inappropriate in a professional setting - such as weapons, cigarettes, vapes, or alcohol - are not permitted.



# Institute and Faculty of Actuaries

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Space,1 Lochrin Square, 92-94 Fountainbridge, Edinburgh, EH3 9QA  
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## Malaysia

Arcc Spaces, Level 30, Vancouver suite, The Gardens North Tower, Lingkaran Syed Putra, 59200, Kuala Lumpur  
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1-3 Staple Inn Hall, High Holborn, London, WC1V 7QH  
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Belsyre Court, 1st Floor, 57 Woodstock Road, Oxford, OX2 6HU  
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