

## Instructions for Completing Request for Accommodation Form

- **First-Time Request**

Complete the [Request for Accommodation Form](#) only if you are requesting accommodations for the first time, or if you are requesting accommodations that differ from those the SOA previously granted you.

- **Repeat Request**

If you are requesting the same accommodations that the SOA previously granted you, you are not required to complete this form provided you are taking the same type of exam and the functional limitations resulting from your disability are not expected to change over time (see the [SOA policy on testing accommodations](#) for additional information). Complete the [Certification Regarding Accommodations Previously Granted by SOA](#) form instead.

### Candidate Information

- A. Provide your name as it appears on the registration application for the examination for which you are requesting accommodations.
- B. Provide the mailing address, telephone number and email address where you may be contacted about your request for testing accommodations. The email address you provide will be used to send the determination letter.

The SOA endeavors to make determinations in a timely manner, as soon as reasonably practicable. Requests are processed in the order in which they are received, with requests for the next examination date taking priority over later examination dates. Barring unforeseen circumstances, the SOA generally will respond to your request within 21 business days of receipt.

- C. Indicate the name of the examination for which you are requesting an accommodation and the date you are taking the examination. For written answer examinations, please also indicate the testing location you have requested.

**NOTE:** For multiple choice examinations administered by Prometric, please leave this blank. Prometric will assign the testing location when you schedule your examination appointment.

## Nature of Your Disorder or Condition

- A. Indicate the disability or disabilities for which you are requesting testing accommodations. Please identify all disabilities that impact your ability to take SOA examinations under standard testing conditions. The SOA will only consider the disabilities you identify in response to this question.
- B. For each disability identified in Section II.A, provide information concerning your first diagnosis of the condition, including your age when diagnosed, the year in which you were diagnosed, and the qualified professional who made the diagnosis.

Please also provide for each disability identified in Section II.A information regarding the most recent confirmation or reassessment of your diagnosis, including your age at the time of the most recent confirmation/reassessment, the year in which this occurred, and the qualified professional who completed the reassessment. *Attach additional sheets if necessary.*

A “qualified professional” is defined as a person who is licensed or otherwise properly credentialed and possesses expertise in the disability for which testing accommodations are sought.

To the extent that you were previously granted accommodations by the SOA and are submitting the Request for Accommodation Form because you do not qualify to submit the Certification of Accommodations Previously Granted by SOA form instead, please list only the information that relates to the different accommodations you are requesting and update any information that has changed since your prior request for which the SOA previously granted accommodations (e.g., information regarding the most recent confirmation or reassessment of your diagnosis).

**For example:** If you are requesting different accommodations; or if you are requesting accommodations for an examination that differs in format, structure or setting than the one for which the SOA previously granted accommodations; or if the functional limitations resulting from your disability have changed over time.

If there has been no change to this information since the date of your most recent request for accommodation, please note that the information remains the same as from your most recent request and identify the examination for which that request was made.

The documentation required to support your request for accommodation will depend upon the nature of the accommodation requested. Use of certain personal items is preapproved and does not require that a candidate submit a Request for Accommodation Form or any supporting documentation. Please consult the [SOA's list of Pre-Approved Personal Items](#) to identify those items for which no request for accommodation or supporting documentation is required. For any accommodation other than use of such pre-approved personal items, please see the section titled "Supporting Documentation" below to determine the supporting documentation required.

- C. Provide a personal description of how each of your disabilities impacts your ability to take SOA examinations under standard testing conditions, and explain why you need each of the accommodations you are requesting (i.e., how does the accommodation alleviate the impact of your disability on your ability to perform on the examination).

You may add any additional information that you wish the SOA to consider. To the extent that you previously have been granted accommodations by the SOA and are submitting the Request for Accommodation Form because you do not qualify to submit the Certification of Accommodations Previously Granted by SOA form instead (see above), please provide only the following:

- a. information that relates to the different accommodations you are requesting;
- b. if taking an examination of a different format, structure or setting than the one for which you previously were granted accommodations by the SOA, the information that relates to how each of your disabilities impacts your ability to take this different examination; and
- c. update any information that has changed since your prior request for which SOA previously granted accommodations.

### **Testing Accommodations Requested**

- A. List all accommodations you are requesting for the SOA's examination. Accommodations must be reasonable, appropriate to the disability, and supported by your medical or psychological documentation.

Descriptions of the SOA's respective examinations, and the conditions under which they are administered, are provided on the SOA's website. Please review

and consider the description of the examination for which you are registering when making your request for accommodation.

Depending on the nature of your disability and/or the format, structure and setting of the examination, reasonable testing accommodations may include, but are not necessarily limited to, the following:

- Braille examination materials.
  - Large print examination materials.
  - Additional testing time.
  - Ability to bring and consume food/drink.
  - A quiet room.
  - A reader (a proctor who will read the examination out loud to the candidate).
  - An amanuensis (scribe to write answers).
  - Use of other special aids or software (such as Zoom Text or a touchpad mouse).
  - Wheelchair accessible testing location and/or table/desk.
- B. If you are requesting additional testing time, you must state how much additional testing time is requested. This should be stated as a percentage (e.g., time-and-a-half, additional 20%). Please note, the SOA examinations are administered in one testing session. No formal break is provided. To the extent you are requesting break/rest time as an accommodation, please indicate the discrete amount of break/rest time you are requesting (e.g., one 15 minute break).

### **Prior Testing Accommodations**

- A. Indicate whether you have previously taken an examination offered by the SOA.
- B. If you have previously taken an examination offered by the SOA, indicate whether you have previously requested testing accommodations from the SOA. If you have previously requested testing accommodations from the SOA, list the examination(s) and examination date(s) for which accommodations were requested, and identify the accommodations approved by the SOA, if any.

You must also indicate whether you are requesting accommodations that differ from those the SOA has previously approved for you, and if so, an explanation why (e.g., subsequent onset of disability, increasing degree of impairment, different examination format/structure necessitates a different accommodation).

If you have previously taken an SOA examination but have not previously requested testing accommodations, you must explain why (e.g., subsequent onset of disability, increasing degree of impairment, different examination format/structure necessitates a different accommodation).

Please note, once SOA has granted a candidate an accommodation for a particular examination, the candidate will only be required to submit documentation in support of request(s) for accommodation for subsequent examinations in the same certification program under the following circumstances:

- 1) the candidate is requesting an accommodation other than one previously approved;
- 2) the candidate's impairment is one which may change over time; or
- 3) the subsequent examination differs in format, structure or setting from the examination for which the accommodation(s) initially were approved.

Please note, all of SOA's examinations are either multiple choice examinations, which may be administered electronically in computer testing centers or in paper/pencil format in other testing centers, or written answer examinations.

If none of these conditions apply to your current request, you need only complete the [Certification of Previously Approved Accommodations](#) to certify that the previously approved accommodations remain necessary. You are not required to submit an additional Request for Accommodation Form or provide additional medical or psychological documentation.

Candidates who have questions regarding whether they may submit a certification form in lieu of a Request for Accommodation Form with supporting documentation should contact [accommodations@soa.org](mailto:accommodations@soa.org) or +1-847-706-3505.

- C. Indicate whether you have received accommodations in other testing situations, such as other professional licensing, certification or credentialing tests, or standardized admission tests (for example, SAT 1, SAT 11, ACT, GRE, GED, DAT, MCAT, GMAT, or LSAT).

For each test taken, identify the test, the nature of the test, whether you requested accommodations, and the accommodations granted. If you have a letter or similar documentation from the testing entity confirming the specific accommodations provided, attach a copy to your request.

If you did not request accommodations (or if you took the exam multiple times and did not request accommodations for all administrations), you must explain why.

- D. You must indicate whether you currently are experiencing the functional limitations caused by the disability or disabilities for which testing accommodations were previously approved for you, whether by SOA or another testing entity.

If you currently are not experiencing the same functional limitations, you must explain how the functional limitations caused by your disability have changed.

### **Prior-Education Accommodation History**

- A. Indicate whether you previously received accommodations while in postsecondary school (undergraduate or graduate school), secondary school (high school), or elementary school. If so, identify the school providing the accommodations and specify in what years (i.e., first year only, all four years), what accommodations were provided and what was your disability at the time.

For testing accommodations, please list the type of test (e.g., multiple choice, essay) and the course type. Please produce a letter from the school's Office of Disabilities on its official letterhead that details all of the accommodations you received and the disability (ies) for which they were provided.

If you did not previously receive accommodations in prior educational settings, please explain why accommodations are now necessary.

- B. If you have received accommodations in prior educational settings, please provide relevant documentation confirming your receipt of these testing accommodations. Such documentation may include a copy of your most recent formal evaluation, IEP, Section 504 Plan, Summary of Performance, or Private School Formal Written Plan, if available; other relevant record or documentation of the testing accommodations you received and the disabilities for which they were provided, such as a letter on school letterhead; or record of attendance at a specialized school that provided such testing accommodations to all students.

## Supporting Documentation

**For any accommodation other than** use of pre-approved personal items (see [SOA's list of Pre-Approved Personal Items](#)), your Request for Accommodation Form must be supported with appropriate documentation. The supporting documentation required will depend on the accommodation you are requesting. All documents must be in English. The candidate is responsible for providing certified English translations of non-English documentation.

Additionally, to the extent you previously have been granted accommodations by SOA and are submitting the Request for Accommodation Form because you do not qualify to submit the Certification of Accommodations Previously Granted by SOA form instead (see above), please submit only the supporting documentation that relates to your current request.

**For example:** You must submit documentation to support your request for any accommodation that differs from those previously granted by SOA, but you are not required submit documentation supporting your continuing need for accommodations previously granted by SOA unless those accommodations were based on a disability that may change over time.

To the extent you are requesting accommodations for an examination that differs in format, structure or setting than the examination for which SOA previously granted you an accommodation, you are required to submit documentation establishing your need for the requested accommodations for the current examination.

### **Medical or Psychological Documentation**

For any accommodation other than use of pre-approved personal items, in addition to producing the supporting documentation specified in the Request for Accommodation Form, candidates also must obtain and submit the [Verification by Qualified Professional Form](#), which verifies the candidate's disorder/condition and the need for the requested accommodation(s).

Alternatively, a written correspondence from a qualified professional may be submitted in lieu of the verification form, provided it contains the same information requested on the verification form. The qualified professional must be familiar with your current functional limitations and need for accommodation.

Additionally, a request for additional time must be supported by objective testing data which indicates the degree to which the candidate's disability affects the candidate's ability to take SOA's examinations. Such documentation must be sufficient to establish that your disability currently substantially limits a major life activity affecting your ability to take SOA's examination(s) under standard testing conditions. Whether documentation is considered sufficiently current will depend on the nature of your disability.

**For example:** Disabilities that have been recently diagnosed, are expected to be temporary, or are expected to improve with time must be supported by relatively recent medical documentation.

For disabilities that have been present since birth, are expected to be permanent, or are not expected to improve over time, your most recent evaluation so stating may be sufficient.

If you have any questions regarding whether your documentation is sufficiently recent, please contact testing [accommodations@soa.org](mailto:accommodations@soa.org) or +1-847-706-3505.

### **Proof of Past Accommodations Received**

To the extent you have received accommodations when taking other professional licensing, credentialing or certification examinations; on standardized examinations; or in graduate or undergraduate school, please attach proof of the accommodations received.

The best proof is a letter from the educational institution or testing authority on its letterhead (photocopies are acceptable). The letter should detail with specificity all accommodations provided.

**For example:** If you received extra time on examinations, the letter should specify the amount of additional time received and not just state “extra time.”

If the accommodations received differed according to the nature of the examination or different sections of the examination (for example, multiple choice versus written answer examinations), the letter should so indicate. Additionally, with respect to letters verifying accommodations received in undergraduate or graduate school, the letter must specify during which years accommodations were received (e.g., all years, only first year, only last year).

Please note, while SOA does give consideration to the accommodations a candidate has received in other testing situations and/or educational settings, given the nature of SOA’s examinations and the skills being tested, the accommodations granted by SOA may differ from those the candidate received in other testing or educational situations.

## **Certification and Authorization**

You must sign and date the certification and authorization.

## **Filing Information**

The completed [Request for Accommodation Form](#) and all required supporting documentation (or the [Certification Form for Accommodations Previously Approved](#)) must be submitted to SOA



by the registration deadline for the examination.

All requests for accommodation must be reviewed and approved by SOA. To facilitate this process, please submit your request directly to SOA and not the testing administrator, Prometric.

Please note that these completed materials must be **received** by the registration deadline. Postmark dates will not be considered. The candidate is responsible for obtaining and submitting all required documentation and completed/signed forms by the registration deadline for the examination at issue.

The form and supporting documentation may be submitted by scanning the documents and then emailing them to the SOA as follows: [accommodations@soa.org](mailto:accommodations@soa.org)

SOA strongly encourages candidates requesting an accommodation to do so well in advance of the registration deadline for the examination.

In certain circumstances, SOA may request clarification of the information or documentation submitted, and/or require supplemental documentation or information. All such supplemental information and/or documentation must be received by SOA prior to the registration deadline for the examination.

Submitting the Request for Accommodation Form and supporting documentation well in advance of the registration deadline will provide the candidate an opportunity to respond to any such request and still receive timely notification of SOA's determination prior to the actual examination.

## Contact

For additional information regarding requests for accommodation, and/or completion of the required forms and documentation, please contact: [accommodations@soa.org](mailto:accommodations@soa.org)