



# PFS Credential Exam Registration and Scheduling Terms and Conditions

The following information is included in this document to provide guidance to candidates to register for and schedule their PFS Exam sessions.

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## Registering for the PFS Exam

The 2015PFS Credential Exam administration will take place twice during per year and registration for the exams will be offered on a year-round basis. The first exam will be offered between June 19th and July 31st. The second exam will be offered during the month of November (2nd – 30th).

Individuals interested in taking the exam must register online and pay the required exam fee to the AICPA. To register, visit [www.aicpa.org/PFSexam](http://www.aicpa.org/PFSexam) and click on the “Register Here” link at the top of the page. Online registration is available to both AICPA and non-AICPA members.

Upon registering, candidates will receive a confirmation via email. This confirmation does not serve as the Notification to Schedule mentioned below.

## Notification to Schedule (NTS) Email

The AICPA will provide registrants their Notification to Schedule (NTS) letter and copy of the Kryterion Test Center Procedures via email ONLY as follows:

1. *For the summer exam window*, registrants will begin to receive their NTS letters in May and then within one week of registering thereafter.
2. *For the fall exam window*, registrants will begin to receive their NTS letters in late September and then within one week of registering thereafter.

Upon receipt of the NTS, registrants should follow the instructions and use the assigned voucher code included in the NTS to schedule their exam session on the Webassessor site. Exam sessions are held at local Kryterion High-Stakes Online Secured Testing (HOST) Centers.

The candidate must have a valid email address on file or provide one during the registration process. If there is not a valid email address on file, the candidate will not receive the NTS letter. The NTS Letter will contain the candidate voucher code and test administration information including a website link and a toll-free telephone number to schedule a test appointment. The Test Center Procedures will include relevant information surrounding the actual testing session at one of the nationwide Kryterion testing centers.

If a candidate does not receive this Notice to Schedule email, he/she should notify the AICPA at [PFS@aicpa.org](mailto:PFS@aicpa.org) or call 888.777.7077.

## Scheduling an Exam

Exam scheduling will be available immediately upon receipt of the NTS letter. It is important that candidates schedule their exam sessions as soon as possible because appointments are made on a first-come, first-serve basis and there are limited seats at the testing centers. The sooner one schedules, the more likely one will be able to take the exam at his/her desired location and time frame.

**NOTE: The closer to the exam window that candidates schedule an appointment, the more challenging it becomes to select a *preferable* time and location.**

When a candidate is prepared to schedule his/her exam appointment, he/she should refer to the steps below. A walkthrough of this process can be accessed [here](#).

1. Visit [www.webassessor.com/aicpa\\_pfs](http://www.webassessor.com/aicpa_pfs).
2. Follow the steps to establish a test taker account.
  - If you have already established a test taker account, use the username and password that was previously provided. For assistance with your username or password, please contact the AICPA Service Center Operations Department at 866.835.2938 or email [pfs@aicpa.org](mailto:pfs@aicpa.org).
3. Upon receipt of email confirmation from Webassessor providing username and password, login to Webassessor to schedule exam.
4. Click on the *Schedule Exam* link in the task bar at the top of the page.
5. Select the *PFS Exam* and click on *Register Now* button.
6. Select the desired HOST location.
7. Select the desired date and time a HOST location is available.
8. After the Shopping Cart page confirms the exam, location, date and time, proceed to *Check Out*.
9. Upon checkout, enter the voucher code that was provided in the NTS letter.
10. Upon acceptance of the voucher code, click the *Submit* button and then click on the *Done* button on the subsequent screen.
11. A scheduling confirmation email will be sent to the email address provided.
  - **It is important to print and/or keep a copy of this confirmation page on file as it includes the Test Authorization Code required for exam admittance on-site.**

**Reminder: Candidates may schedule ONLY after receipt of the NTS letter.**

If there are difficulties finding one of the High-stakes Online Secure Testing (HOST) locations within a 100-mile radius, and/or a HOST location with available dates and times, candidates should contact KRYTERION Test Taker Support at 800.403.6199 or 602.659.4708 Monday through Friday from 9:00 AM to 8:00 PM, (ET) or send an email to [hostschedulerequest@kryteriononline.com](mailto:hostschedulerequest@kryteriononline.com). Many times they are able to contact a local testing center and extend their hours to enable the test to be taken at your desired location.

## Refunds

**PFS Exam registration fees are non-refundable and are not transferable to other AICPA programs.** If a candidate fails to schedule and/or attend the testing appointment, he/she will forfeit all exam fees paid.

## Rescheduling and Cancellations

If a candidate is unable to appear for his/her originally scheduled appointment, he/she has two options:

1. Reschedule the original appointment time for a date within the same exam window
2. Cancel the exam session and re-register for the exam in a future exam window\*

If a candidate selects either option noted above, he/she must complete his/her election **no less than 72 hours prior to the scheduled appointment.**

Candidates are able to reschedule without AICPA intervention as often as needed so long as it is done 72 hours prior to the exam session. Exceptions will ONLY be made for bereavement or illness supported by appropriate medical documentation.

**\*NOTE: If a candidate no longer wishes to sit for the PFS Exam in the exam window for which the registration was purchased, all exam fees will be forfeited.**

In order to reschedule an exam session, please use the following steps:

1. Login to the test taker account created on Webassessor at [http://www.webassessor.com/aicpa\\_pfs](http://www.webassessor.com/aicpa_pfs).
2. On the Home page within the Scheduled Exams section, click on the Details link.
3. On the Registration Details page, click on Reschedule.

## Test Center Regulations

There is an extensive list of Identification requirements and Test Center Regulations that will be provided to candidates along with the NTS letter. Candidates must review this document to be adequately prepared. It is also located as a download at [www.aicpa.org/PFSexam](http://www.aicpa.org/PFSexam).

## Special Conditions Appointments (for Candidates with Special Needs)

All Kryterion HOST Locations are required to operate under the guidelines of equal opportunity, affirmative action and the Americans with Disabilities Act (ADA) if in the USA, as well as all other local, state and federal regulations. HOST Locations are also required to abide by all laws regarding the accommodation of individuals with disabilities with respect to the accessibility of the physical premises as well as seating and computer workstation configurations, e.g. wheel chair accessibility.

During the registration process, candidates with disabilities or special needs are required to make arrangements with the AICPA instead of scheduling their test session at a HOST Location. The process is as follows:

1. Special accommodations candidates will register online for exam.
2. Candidate will contact AICPA directly (via email at PFS@aicpa.org or via phone at 888.777.7077) to make special arrangements and identify desired test date and location (at least 45 days prior to desired test date).
3. AICPA will request from candidate and obtain documentation supporting special needs consideration as well as the desired test date and location.
4. After obtaining necessary documentation and test date and location information, AICPA will contact Kryterion and make scheduling arrangements on behalf of candidate.
5. Candidate will be provided confirmation of scheduled test appointment via email to the email address provided by the candidate.

In cases where it is necessary and based upon AICPA approval, Kryterion will send professional interpreters, test readers, recorders or Foreign Language Interpreters to the HOST Location to assist the candidate during his/her test session.

All special accommodations requests must be made at least 45 days in advance of the desired schedule date. For anyone that requires such accommodations and has not done so in advance, the test session will be administered under normal circumstances.

## Examination Tips

Knowledge of the subject matter is essential for success on the examination. However, there are some examination-taking techniques that can assist candidates in taking the exam. The following are some suggested techniques:

- **Be punctual.** Plan to arrive at the examination room well in advance of the starting time (at least 15 minutes). Allow time for any unforeseen delays.
- **Budget your time.** Consider the number of multiple-choice and case study questions in each part of the exam and the time allotted so that each question can be addressed.
- **Answer all questions.** All multiple-choice questions should be answered with the best answer. There is no penalty for incorrect answers, and grades are based solely on the total number of correct answers.
- **Read the case-study questions.** Carefully read the entire case-study question to get a general idea of the subject matter being tested. Then reread the question and make note on the scratch paper provided of the pertinent information. Some candidates

approach a case-study question by reading the requirements first and then by reading the situation for the information it contains. This procedure may enable candidates to identify the data more rapidly and to classify the information for pertinence. The case-study questions are intended to be straightforward. Assumptions are rarely necessary.

## Exit Survey

When candidates complete the exam, they will be asked to complete a brief automated survey that will provide feedback on how to improve the testing process.

## Test Results

Exam grading takes place during the two months following each PFS exam window. Test results are mailed at the conclusion of the grading process.

Results are provided on the basis of “pass” or “fail”. The PFS exam is designed to psychometrically assess whether candidates have a sufficient base level comprehension of the PFP body of knowledge and the results provide an indication of whether the exam taker meets this minimum threshold.

**NOTE: No results will be given over the phone.**

## After Passing the Examination

After the candidate passes the examination, an official pass/fail letter will be sent via email and US mail notifying him/her of the results. This letter will detail the next steps the candidate needs to address, such as completing the PFS Credential application contained within the PFS Credential Application Kit. The kit identifies the experience and education required to obtain the PFS Credential. Once all the requirements have been met and the credential application has been submitted, a PFS certificate will be sent within four weeks.

Upon receipt of the certificate, the member will be eligible to use the PFS Credential in compliance with the rules of the state in which he/she practices.

Members are not certified until they receive this notice.

## Failing the Examination

If a candidate does not pass the PFS examination and wishes to retake the exam in the following exam window, he/she can retake the exam for a fee of \$100.

## Additional Questions

For questions about the PFS Credential program, candidates may contact the AICPA Member Service Center at 888.777.7077 or send an email to [PFS@aicpa.org](mailto:PFS@aicpa.org).

Candidates can view other important information about the PFS Exam and the PFS Credential online by going to [aicpa.org/pfp/PFS](http://aicpa.org/pfp/PFS).