CAIA Candidate Online Remote Proctoring Orientation (OnVUE)

June 24, 2021

TODAY'S PRESENTERS

Nelson Lacey, Ph.D., CFA
Director of Exams

Sarah Auerbach
Director of Candidate & Member Relations

TODAY'S AGENDA

- Welcome
- OnVUE Overview
- What to Consider
- What is new with OnVUE
- OnVUE Candidate Journey
- Resources
- Questions & Answers

CAIA EXAM ONVUE TESTING OPTIONS

ONLINE REMOTE PROCTORED EXAM (ONVUE)

- **OnVUE Exam Window:**
  - Level I: August 30 – Sept 5
  - Level II: Sept 13-19
- Opt-in to the OnVUE exam from your CAIA profile*
- CAIA will notify you within 48-72 hours with instructions to schedule
- Appointments 24X7

*Your test center appointment will be cancelled by CAIA after you opt-in.

CAIA EXAM ONVUE TESTING OPTIONS

ONLINE REMOTE PROCTORED EXAM (ONVUE)

2 Part Exam

- 5-minute NDA review and agreement
- Part 1: 100 multiple choice questions/120 minutes
- 20-minute optional break, can leave the testing room
- Part 2: 100 multiple choice questions/120 minutes (Level II will instead have 3 sets of constructed response questions/120 minutes)

Total 4.5 Hours

WHAT TO CONSIDER?

Comparing Your Options	Pearson VUE Test Center Window August 30-Sept 10 Sept 13-24	OnVUE Testing Window August 30-Sept 5 Sept 13-19
Calculator	Candidates may only use a CAIA approved calculator. See Candidate Handbook at www.caia.org	
Whiteboard	Dry erase board and pen are provided	Digital whiteboard ONLY, online scratch pad within exam
Un-scheduled breaks	Yes, for bathroom use only and may be escorted. Time lost.	No.
What can I bring into the testing space	Approved calculator, ID, locker key. A small locker will be available for personal items.	One clear glass of water, approved calculator, cell phone for check in purposes, then it must be out of reach.
Accommodations	Available upon request to accommodations@caia.org	Available but may be more limited, upon request to accommodations@caia.org

WHAT TO CONSIDER?

Which EXAM modality is right for you?

Test Center

- Traditional approach
- Center availability
- Pearson VUE COVID-19 protocols
- **Schedule early in the exam window in case of a COVID disruption**

OnVUE

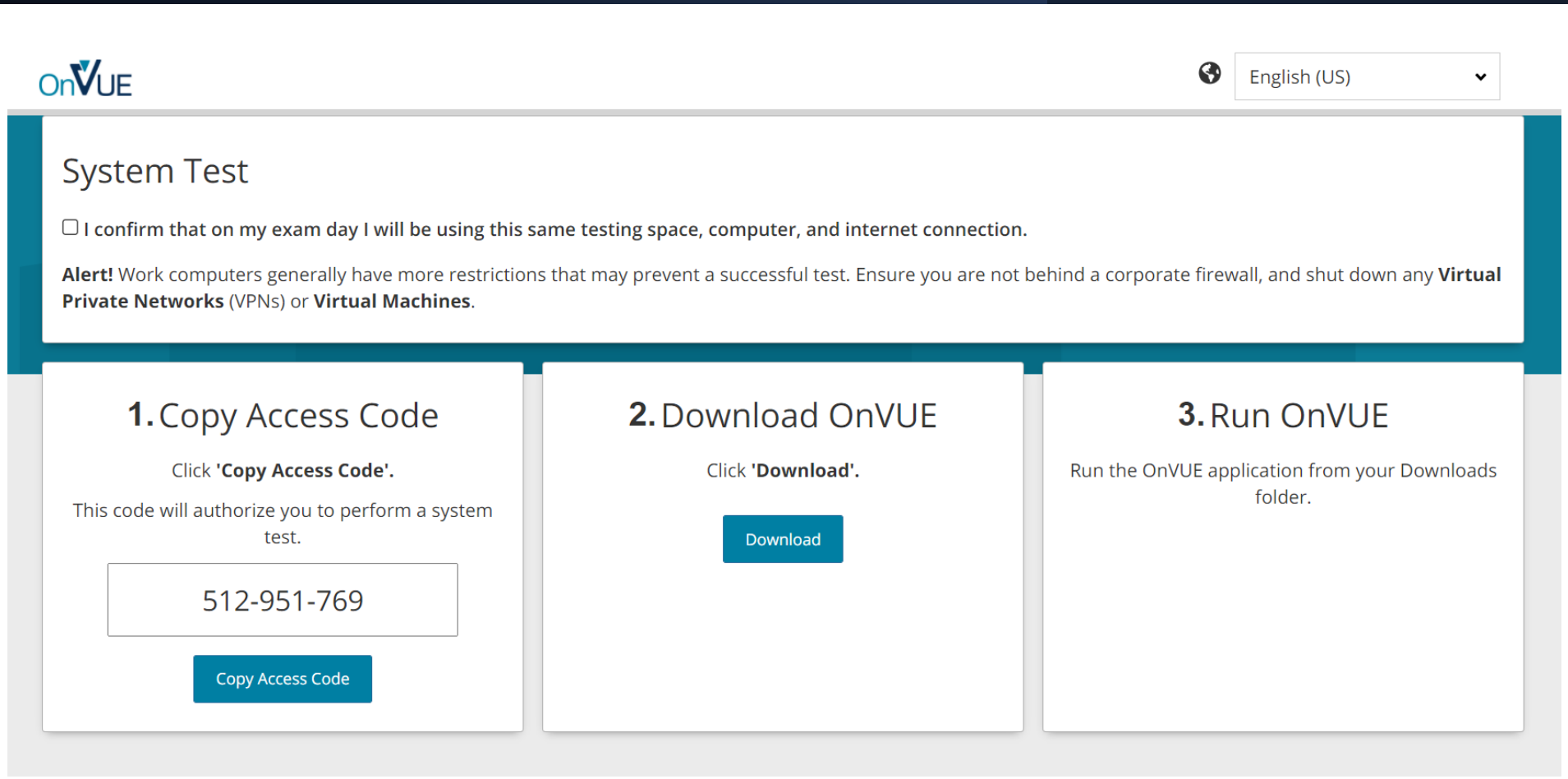
- Private, secure space
- System requirements
  - Technical specifications
  - Personal or work laptop considerations, firewalls, VPNs, applications, scheduled tasks
  - Internet and electricity
- Prepare for OnVUE exam experience
- **Schedule early in the exam window in case of a technical issue**

Other Considerations

- Accommodation consideration – Medical/Disability

WHAT IS NEW WITH ONVUE

OnVUE Enhanced System Test



OnVUE Enhanced System Test - Network

System test: Diagnostics - Network check

Network connections

Your network meets the requirements to take an exam.

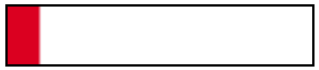
Next

Network checks page with all checks passed

OnVUE Enhanced System Test - Network

System test: Diagnostics - Equipment checks

Microphone



Default - Headset Micro

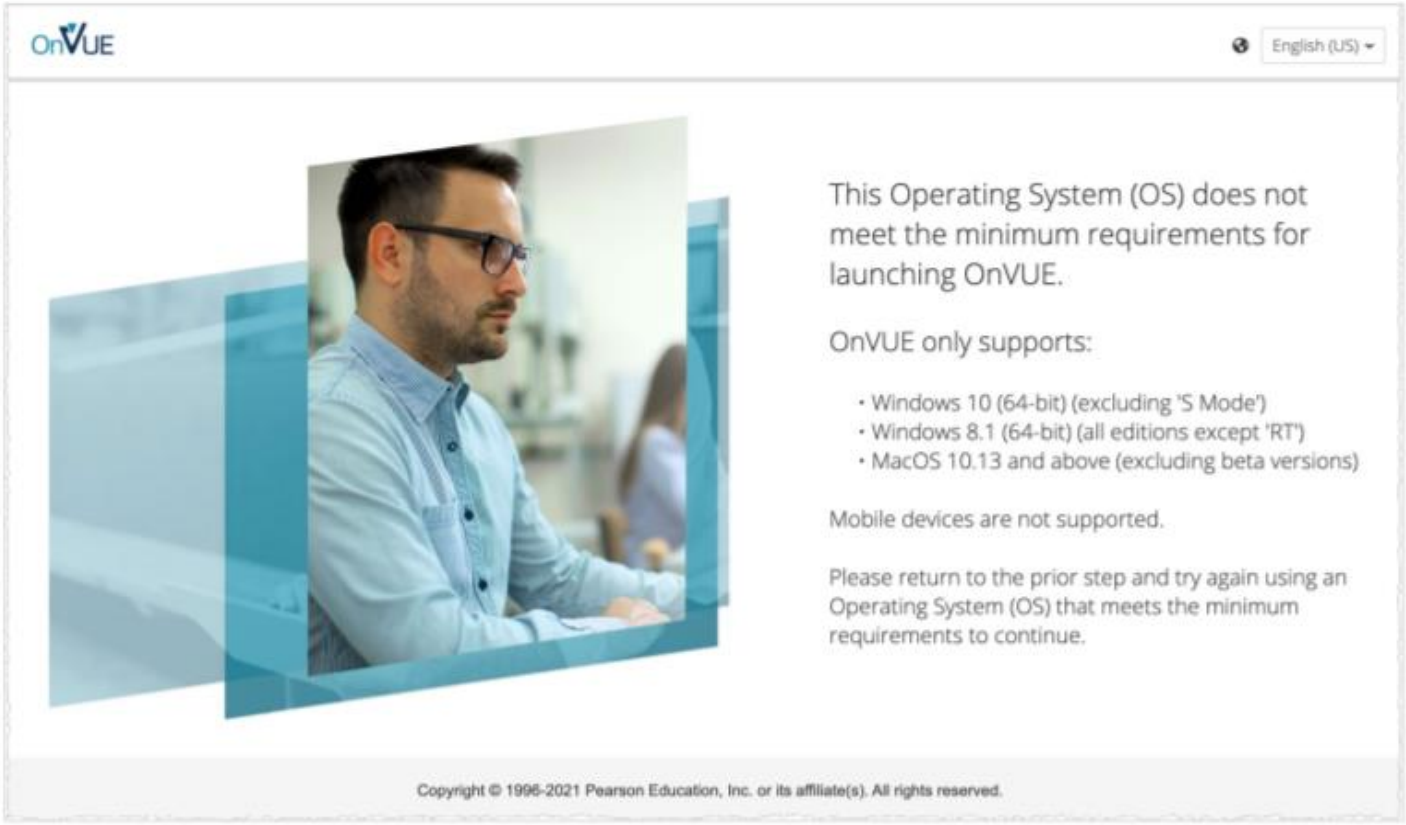
Webcam

Integrated Camera (13d

Previous

Next

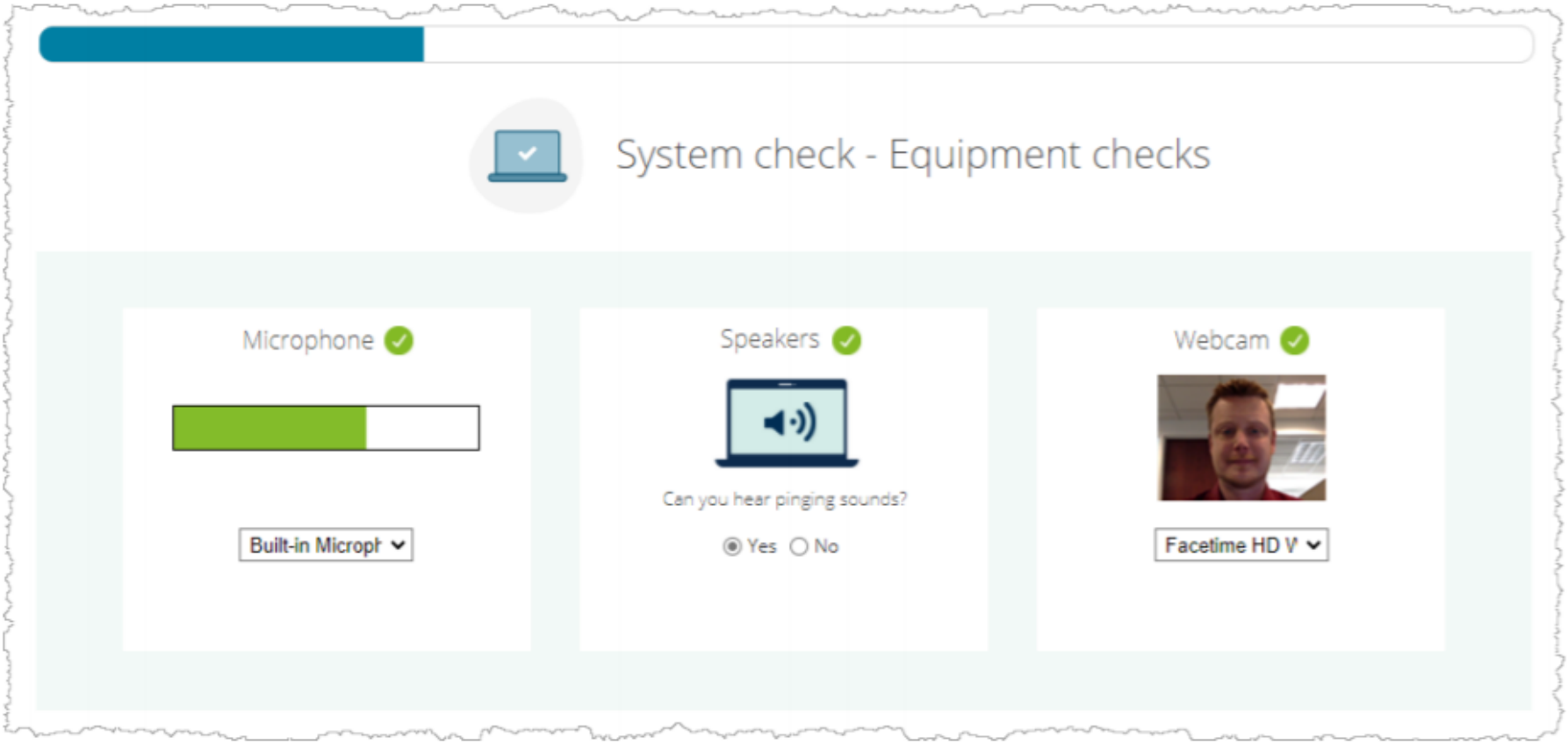
OnVUE Enhanced System Test – Operating System



OnVUE system test message displayed on a desktop computer if an unsupported operating system is used

If downloading OnVUE is not blocked, candidates can proceed with the system test.

OnVUE Enhanced System Test



Equipment checks page of system test showing all checks passed

OnVUE Enhanced System Test

System test - Exam simulation - Launch simulation!

You're almost there!

Launch and complete this quick simulation to confirm your testing experience goes smoothly on exam day.

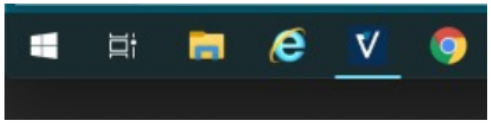
Launch simulation

OnVUE Enhanced System Test

System test - Exam simulation - Close all applications except OnVUE

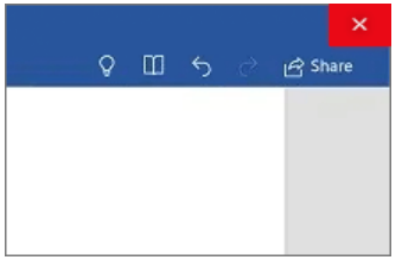
Minimize risk of disruption by following the instructions below:

1. The taskbar must not show lines under any application icons except OnVUE (V).



Note: Your exam will not launch if any applications (except for OnVUE) remain open.

2. Close other applications by clicking the X button in the top-right corner of the application window.

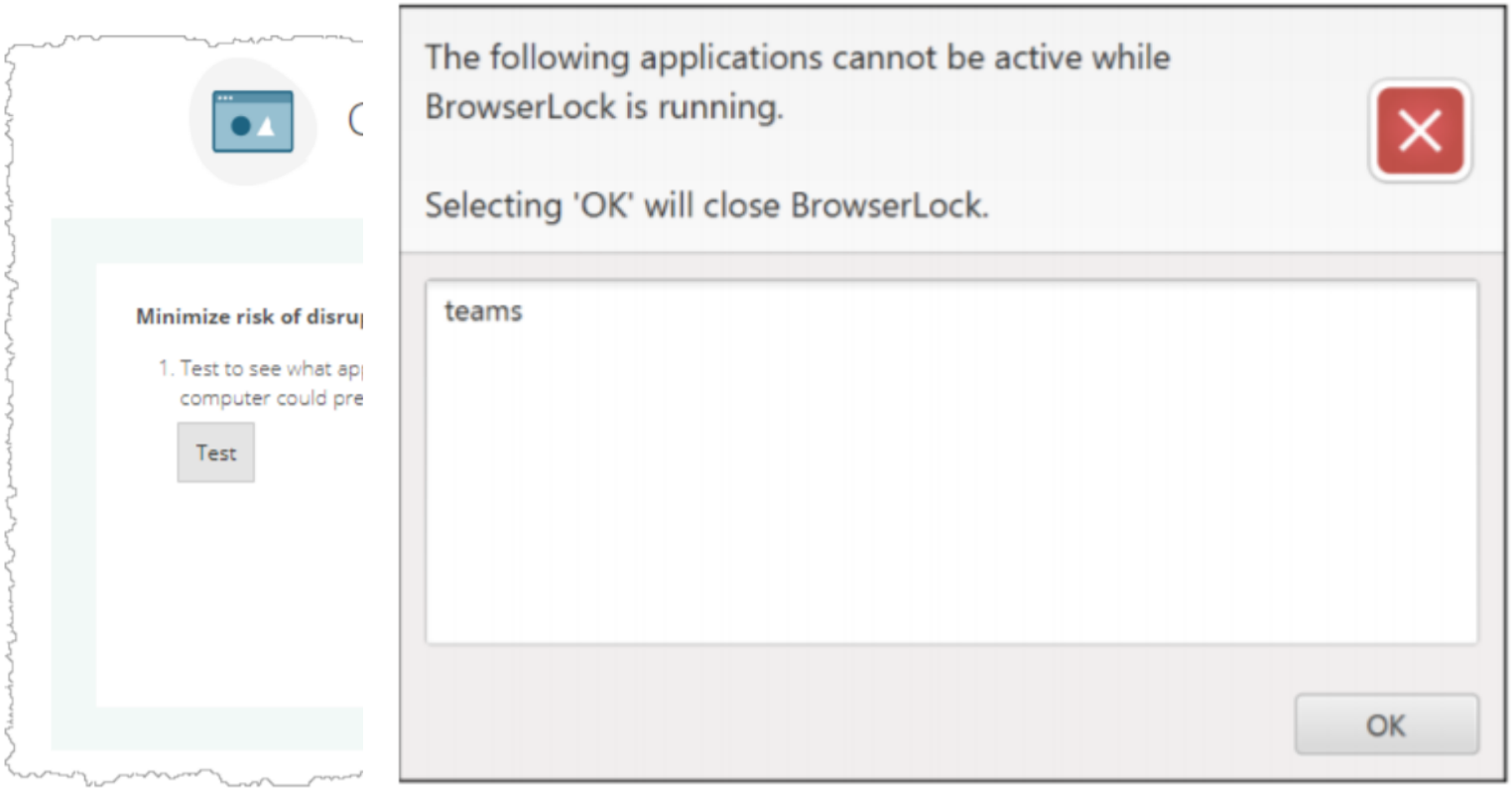


Previous

Next

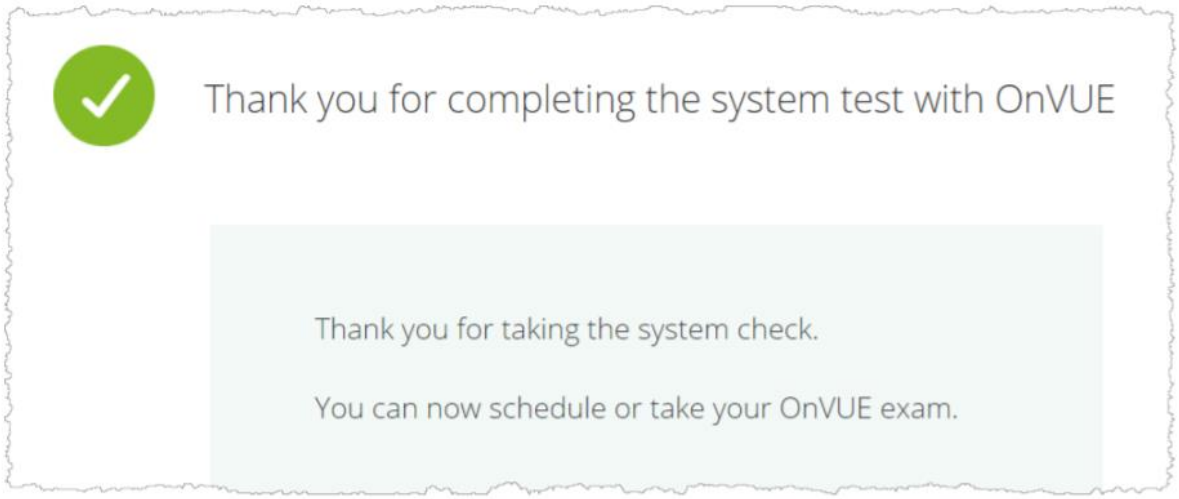
OnVUE Enhanced System Test – Secure Browser Lock

For Windows users



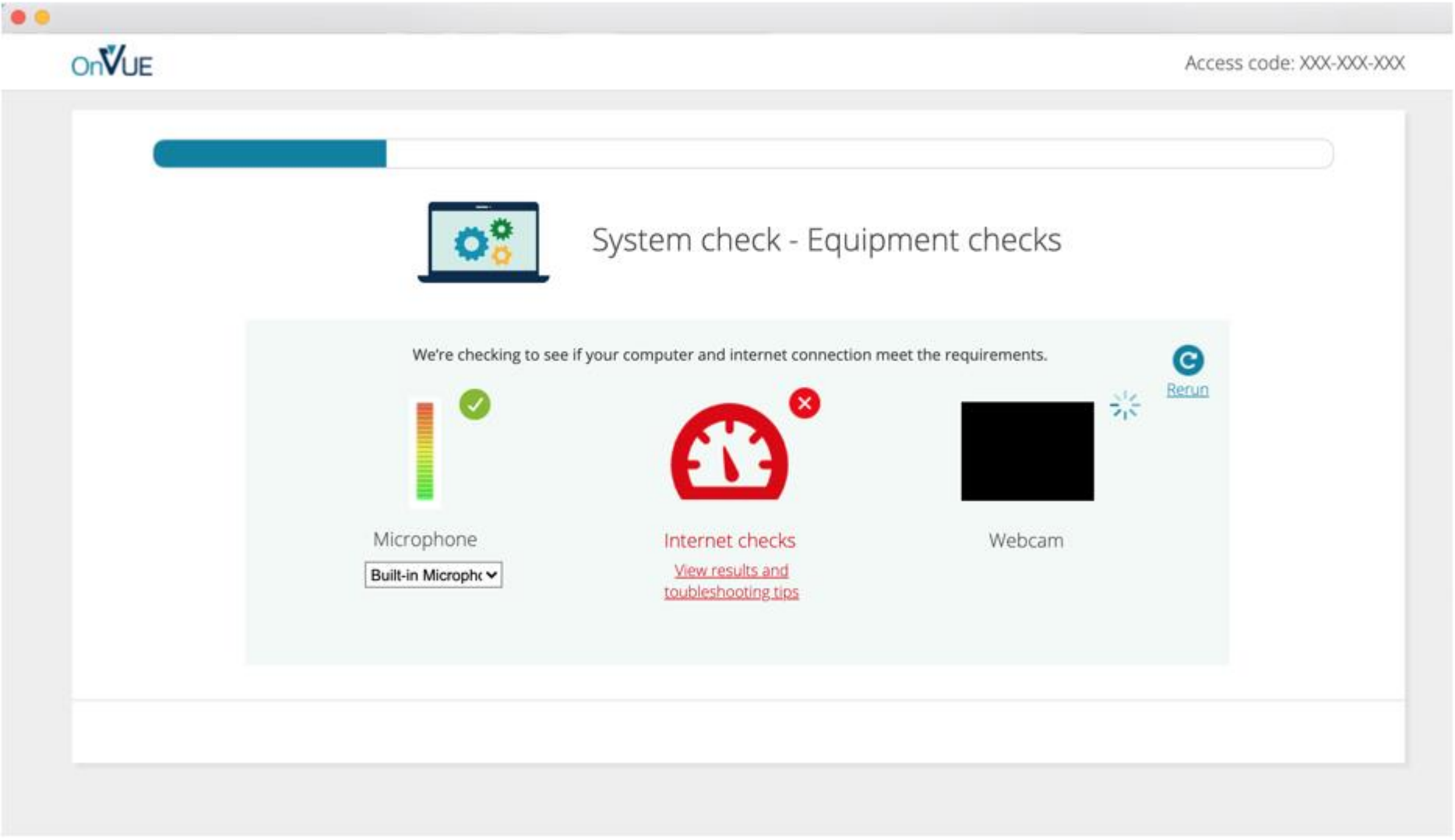
OnVUE Enhanced System Test Completed and Successful Simulation

If candidates can launch and complete the simulated exam, the system test is considered successful and a passed system test is logged for the associated candidate.

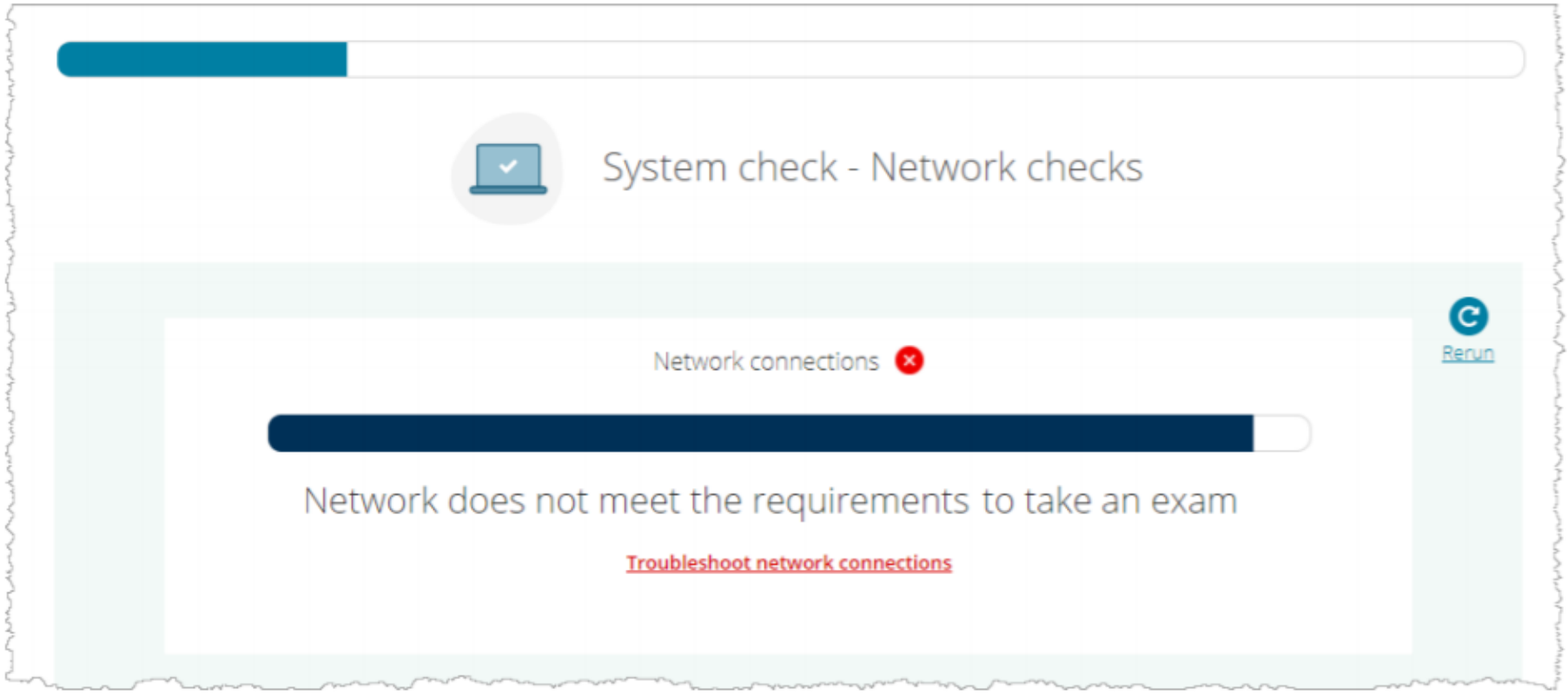


All equipment and connection checks are performed again on exam day to verify that everything still works.

OnVUE Enhanced System Test



OnVUE Enhanced System Test – Network



TROUBLESHOOTING NETWORK ISSUES - EXAMPLES

Satisfying the minimum internet connection speed but failing the ping test for required URLs would result in a set of messages similar to these (listing the relevant URLs).

Internet speed results and requirements:

- Your download speed meets the minimum requirements.

We pinged the following URLs but failed when trying to reach the following:

- https://programworkshop.com/status
- http://rest.ably.io/time

URL pings troubleshooting tips:

- Please ensure you are able to connect to these URLs. Alert your network administrator for instance if you are using a corporate network

Video streaming connection results:

- We were able to make a video streaming connection.

TROUBLESHOOTING NETWORK ISSUES - EXAMPLES

Network ping results and requirements:

- Your home/office network connection failed to reach the following URLs:
  - http://rest.ably.io/time
  - https://rest.ably.io/run

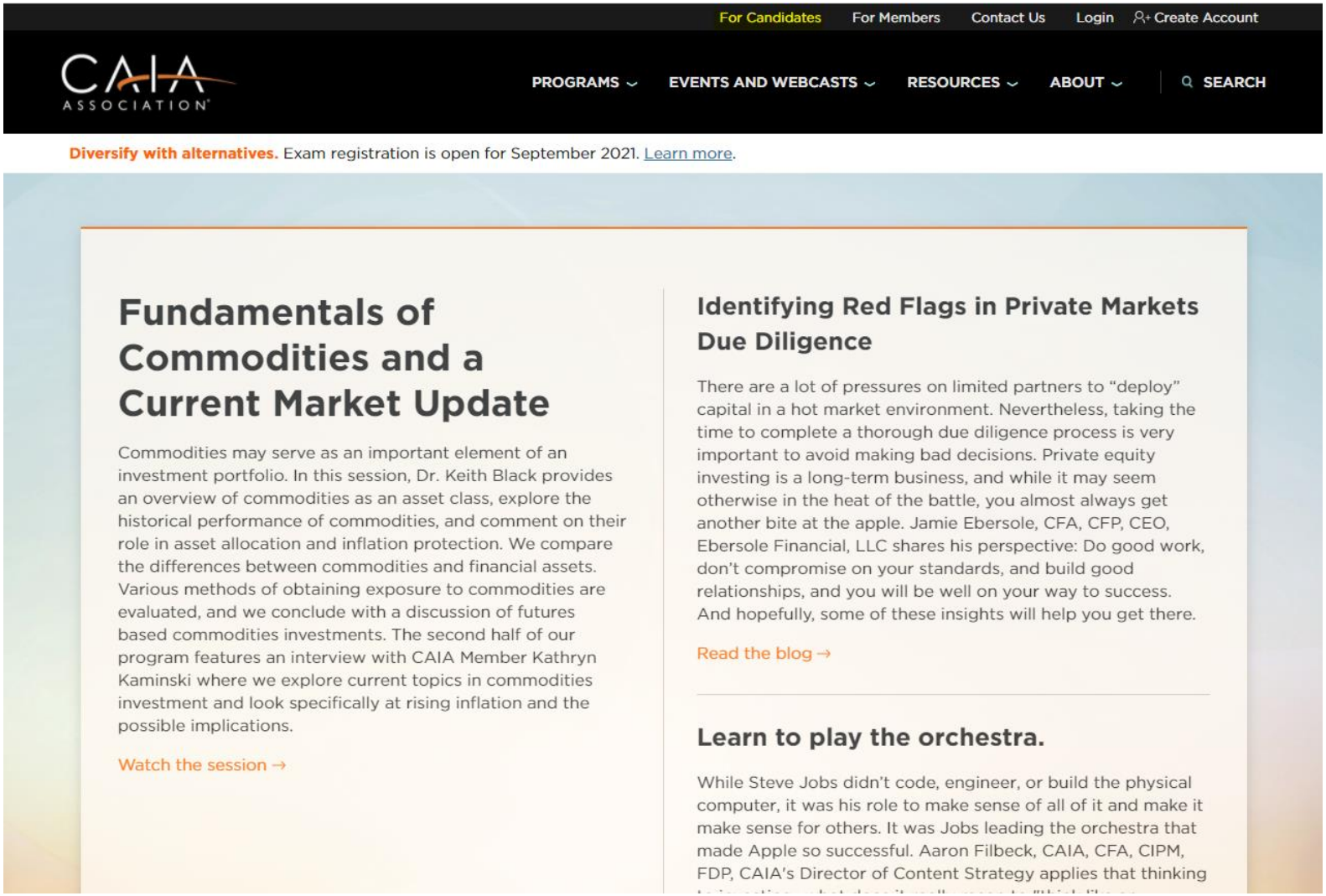
How to connect to required URLs from your home/office network:

- Verify your home or office network or firewall allows these URLs.
  - Corporate or personal firewalls and VPNs can prevent required URLs from being reached.
  - Corporate or personal firewalls and VPNs may cause problems due to packet inspections, packet filtering, and latency.
- Alert your network administrators for assistance if you are using a corporate network.

CANDIDATE ONVUE JOURNEY

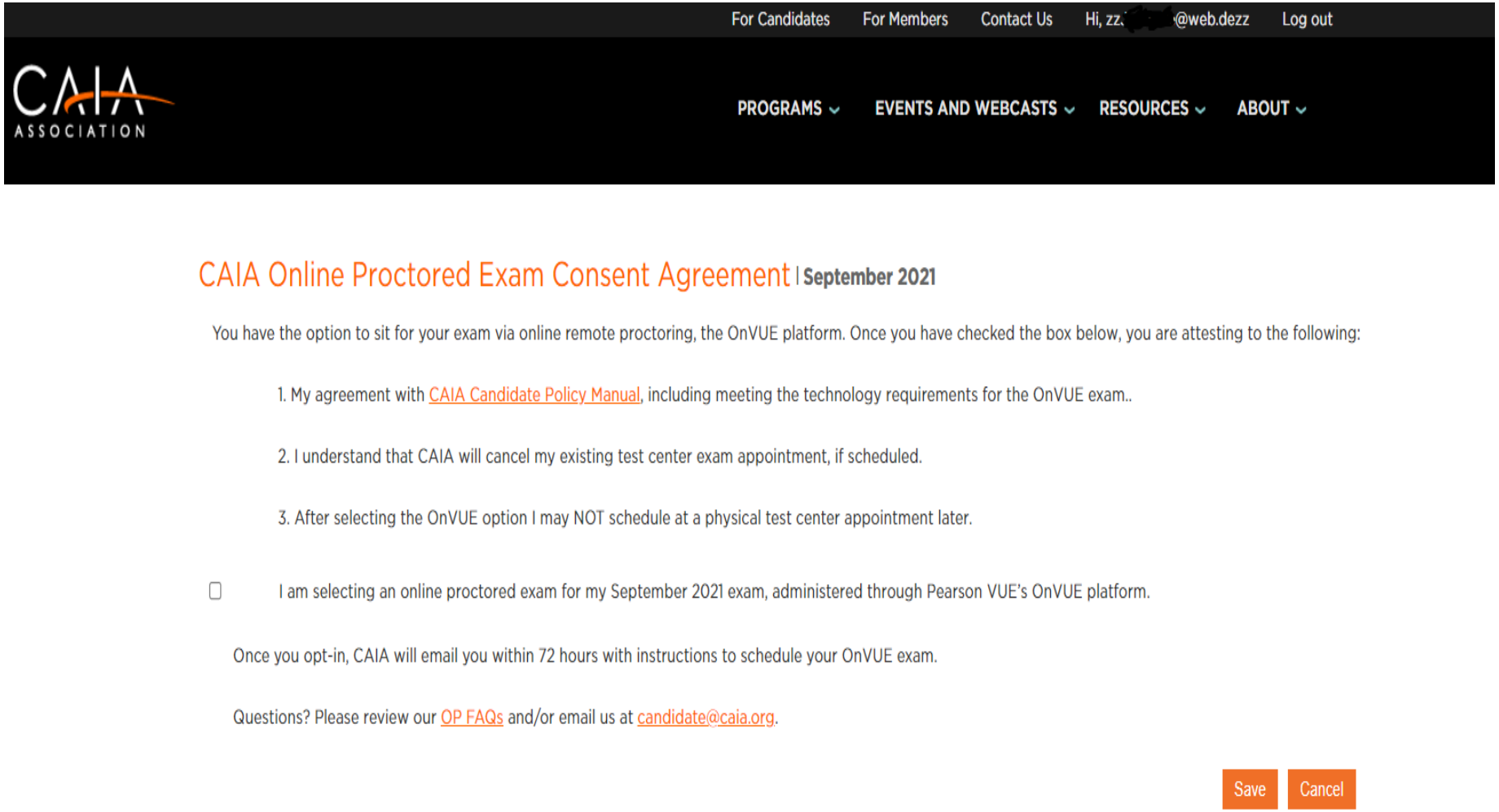
- How to choose the OnVUE exam
- Opting in to the OnVUE exam
- Schedule your OnVUE exam
- Get ready for your OnVUE exam
- Exam day
  - Check-in and launch your OnVUE exam

CANDIDATE ONVUE JOURNEY



YOUR CANDIDATE JOURNEY

Review and attest to the terms

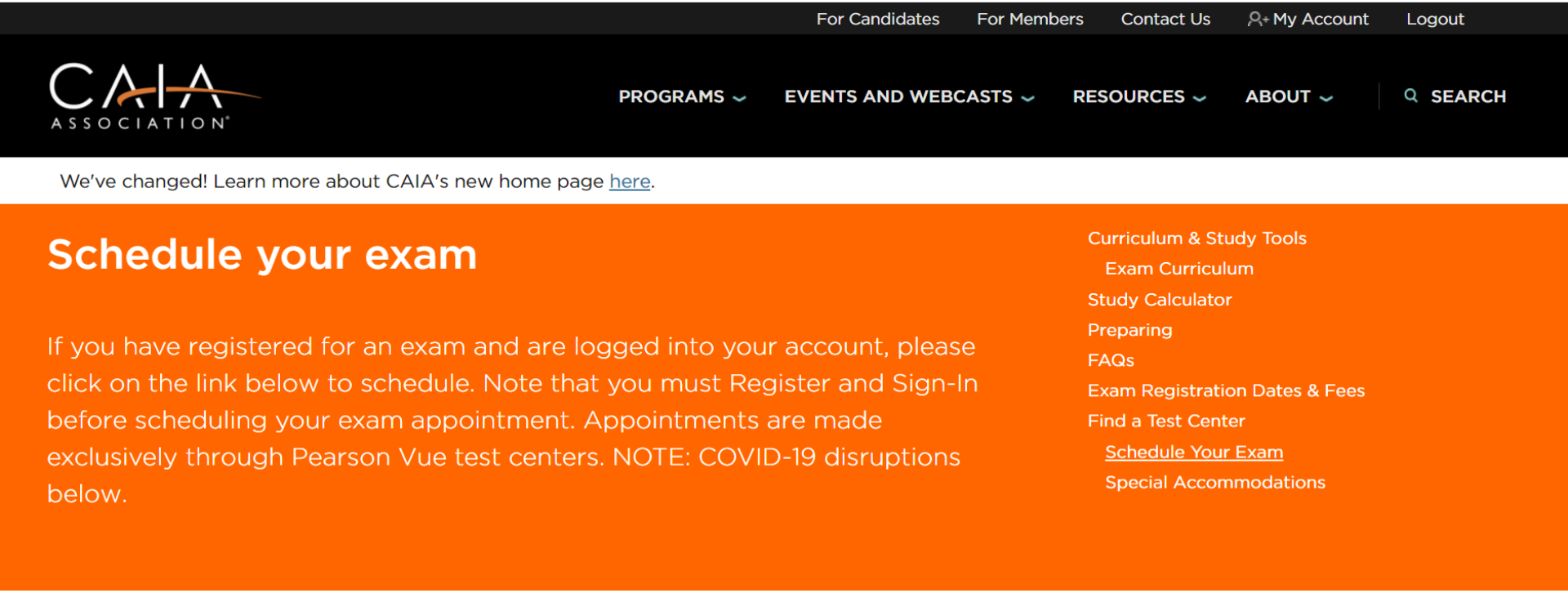


CANDIDATE ONVUE JOURNEY

Congrats! You have opted-in to the OnVUE Exam

Once you select the OnVUE exam CAIA will email you within 48-72 with instructions to schedule your exam

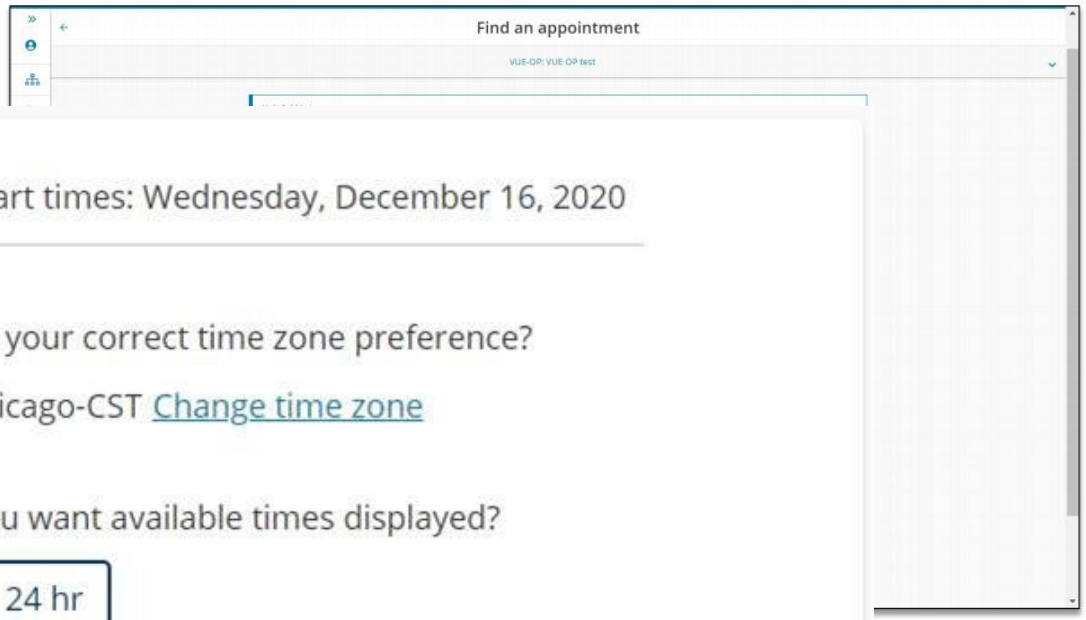
CANDIDATE ONVUE JOURNEY



CANDIDATE ONVUE JOURNEY

AGREE TO PEARSON VUE POLICIES

SCHEDULE APPOINTMENT



Available start times: Wednesday, December 16, 2020

Do we have your correct time zone preference?

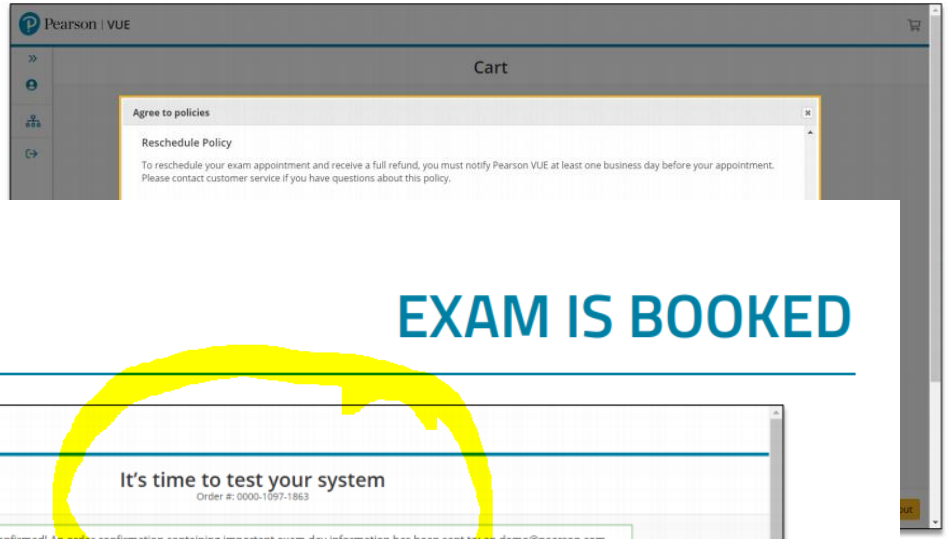
America/Chicago-CST Change time zone

*How do you want available times displayed?

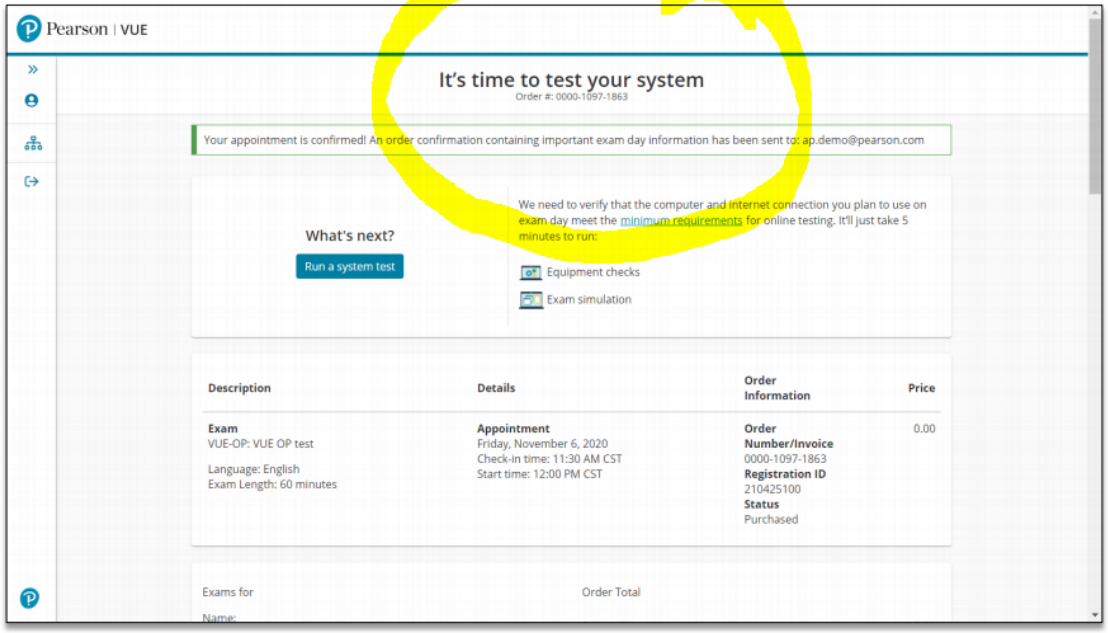
12 hr | 24 hr

CANDIDATE ONVUE JOURNEY

AGREE TO CLIENT POLICIES



EXAM IS BOOKED



ONVUE CANDIDATE JOURNEY

Start Now

- Practice with the Digital Whiteboard

Pearson | VUE

Using the whiteboard during your OnVUE exam

A practice online whiteboard is available at the bottom of the page.

Get familiar with the whiteboard before your exam

Access the whiteboard by clicking the whiteboard icon at the top of the screen during your exam.

You can use the whiteboard for scratch work, using tools such as text, shapes, colors, and zoom, as well as multiple formatting features. You will have a practically endless canvas to work on, so there's no need to erase your work as you move through your exam.

https://home.pearsonvue.com/onvue/whiteboard

ONVUE CANDIDATE JOURNEY

Start Now

- Practice with the Digital Whiteboard

Deeper Dive into the Digital Whiteboard

- Capabilities
  - Type with keyboard or write with mouse
  - Draw shapes and lines
  - Pan across the whiteboard
- Open and close the whiteboard
  - As many times as you want during each exam section
  - Work will remain visible during the exam section, even if you open/close it.
  - Writing on the whiteboard with mouse only
- Scheduled breaks
  - Whiteboard will retain contents for the exam period

https://home.pearsonvue.com/onvue/whiteboard

https://home.pearsonvue.com/caiaa/onvue

ONVUE CANDIDATE JOURNEY

Start Now

- Practice with the Digital Whiteboard

Deeper Dive into the Digital Whiteboard

Tool	Tool Name	Tool Purpose
	Pen	Write or draw text, lines, or shapes; you can choose from several thickness and color settings
	Eraser	Erase content on your whiteboard; you can choose from several thickness settings
	Line	Draw lines; you can choose the type of line and the thickness
	Rectangle	Create boxes or grids
	Circle	Create circles or ovals (e.g. for Geometry or Venn diagrams)
Aa	Text	Enter text and take notes; you can resize and expand the text box (note: you will not be able to copy/paste text from the exam questions in the whiteboard during the exam)
	Free Shape / Polygon	Draw free form shapes
	Move / Pan	Pan and move across the whiteboard; this allows you to move and work across any part of the whiteboard
	Color Selection / Eyedropper	Color selector / dropper
	Stroke / Text Color	Choose or change the text color
	Fill Color	Choose or change the fill color of a shape
	Background Color	Choose or change the background color of the entire whiteboard
	Undo / Redo	Undo change or mistake, or redo to bring back deleted content
	Zoom In / Out	Zoom in and out on any area of the whiteboard
Clear	Clear	Clear all content on the whiteboard
	Close	Close the whiteboard

https://home.pearsonvue.com/onvue/whiteboard

CANDIDATE ONVUE JOURNEY

Week Ahead

- Prepare your space
- Remind household of your exam day plans

•Quiet, private, secure space

•No interruptions

•Clear of papers, books

•Well lit and private space:

  - No one else in the room
  - Others cannot see your exam
  - Best not to sit in front of a window

- Nothing in arm's reach that is not specifically allowed except for:
  - CAIA Approved Calculator is allowed
  - Glass of water in a clear glass allowed.
  - Mobile phone out of arm's reach after you finish using it to take the check in photos. It needs to be available should Pearson VUE need to contact you.

CANDIDATE ONVUE JOURNEY

On Your Exam Day

- OnVUE Set up
- Mobile Check-In
- Final steps to launch your exam

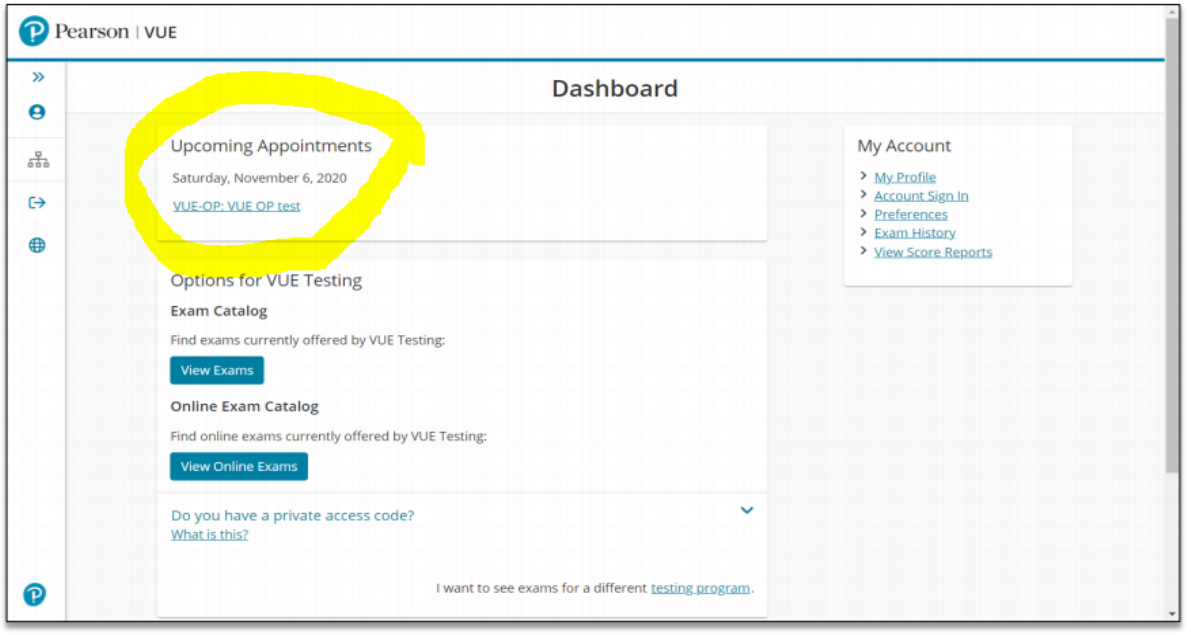
CANDIDATE ONVUE JOURNEY

March 2021 Exam Registration is Now Open.

Hello, Please Log In | Create Account

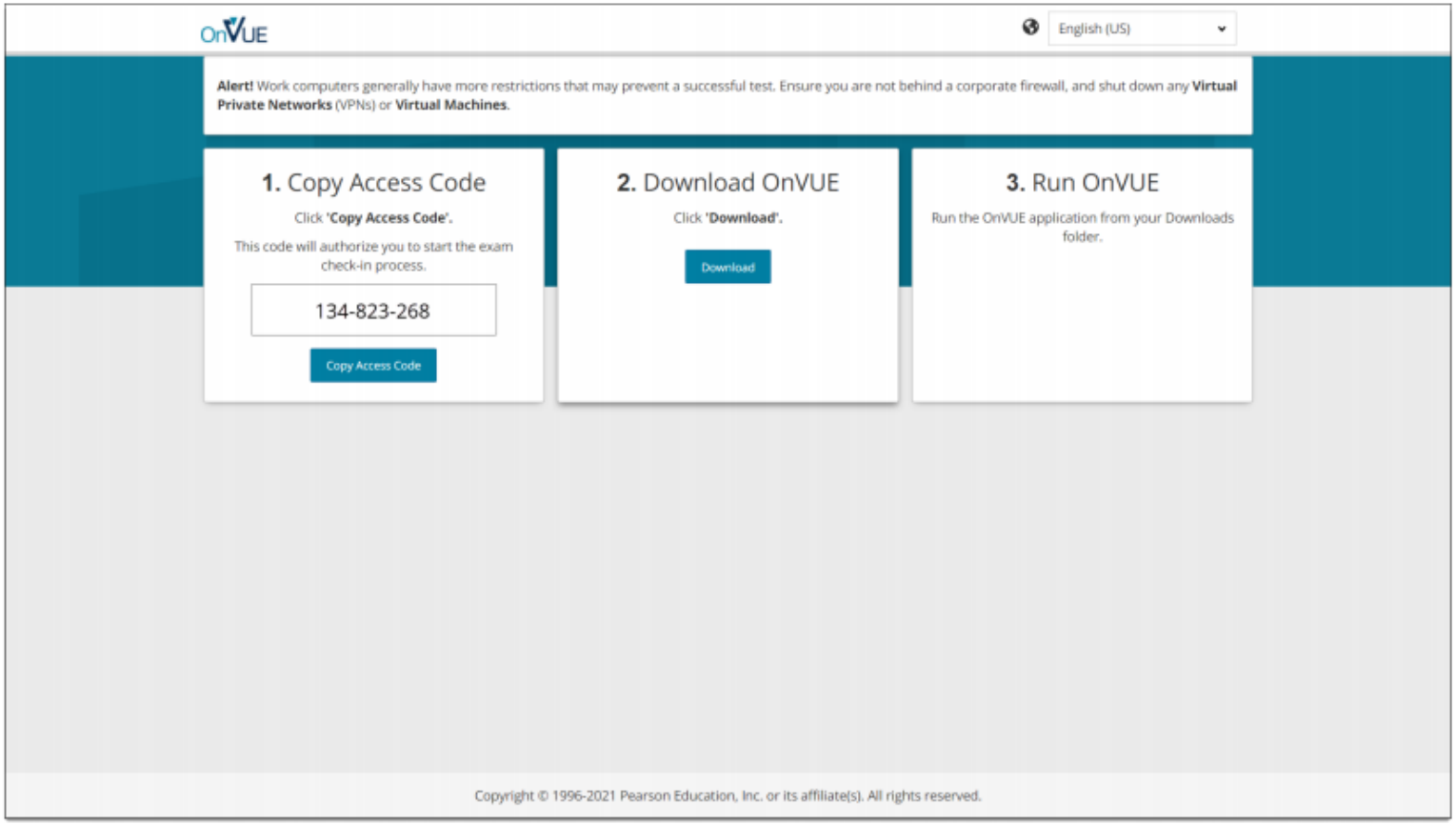
Search

(ON EXAM DAY) SIGN IN TO PEARSON VUE



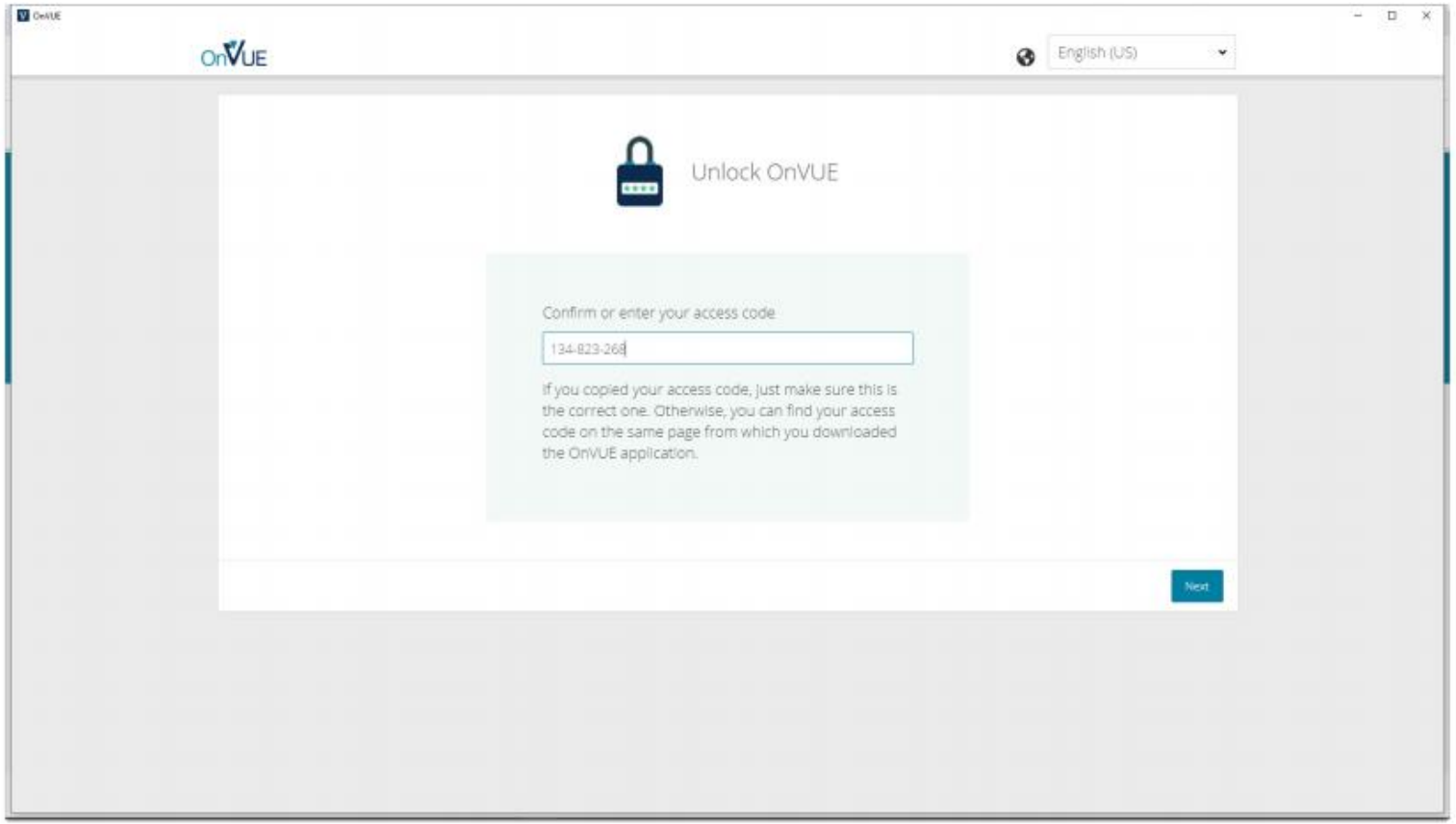
CANDIDATE ONVUE JOURNEY

DOWNLOAD AND LAUNCH ONVUE



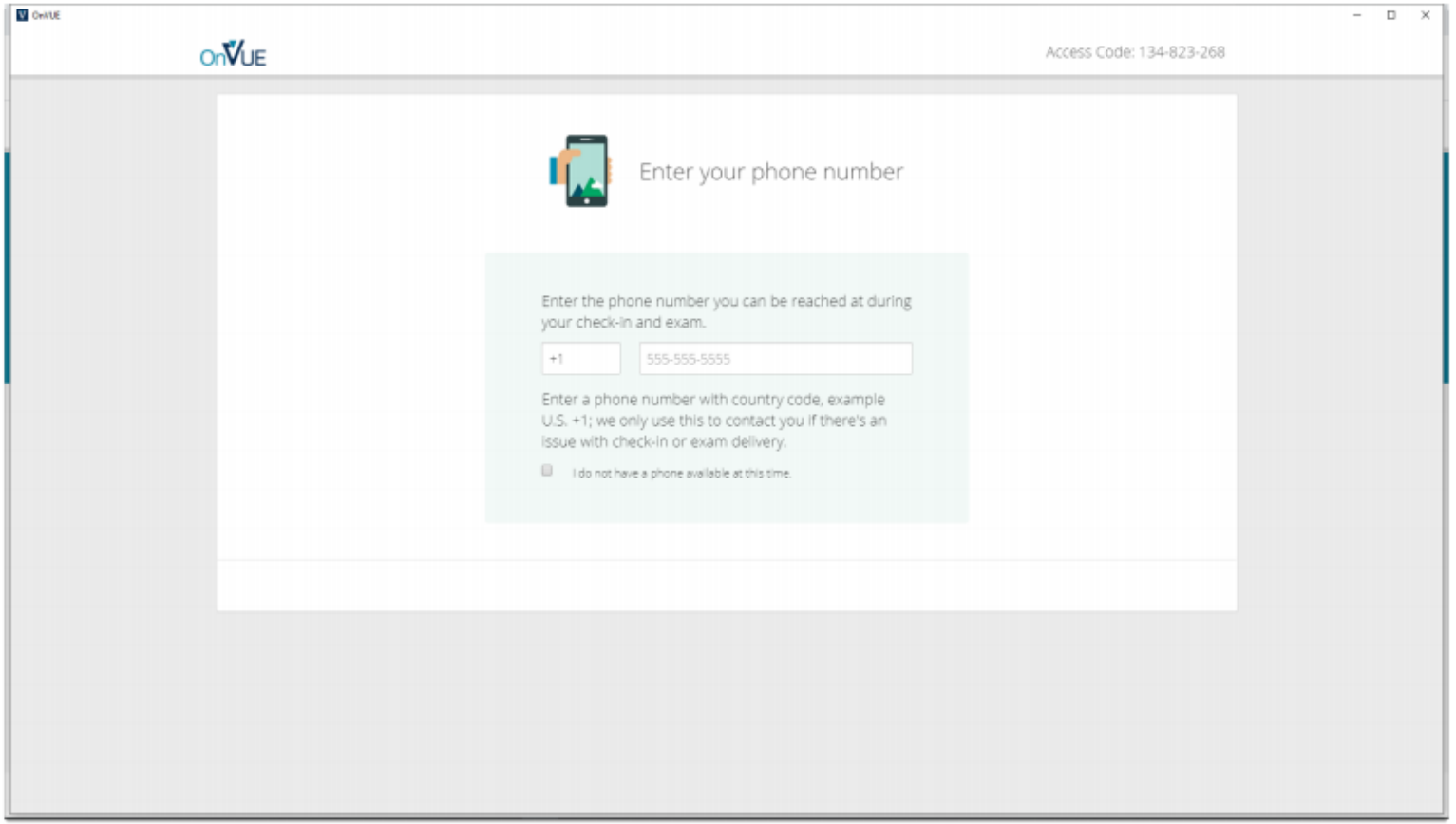
CANDIDATE ONVUE JOURNEY

ENTER ONVUE ACCESS CODE



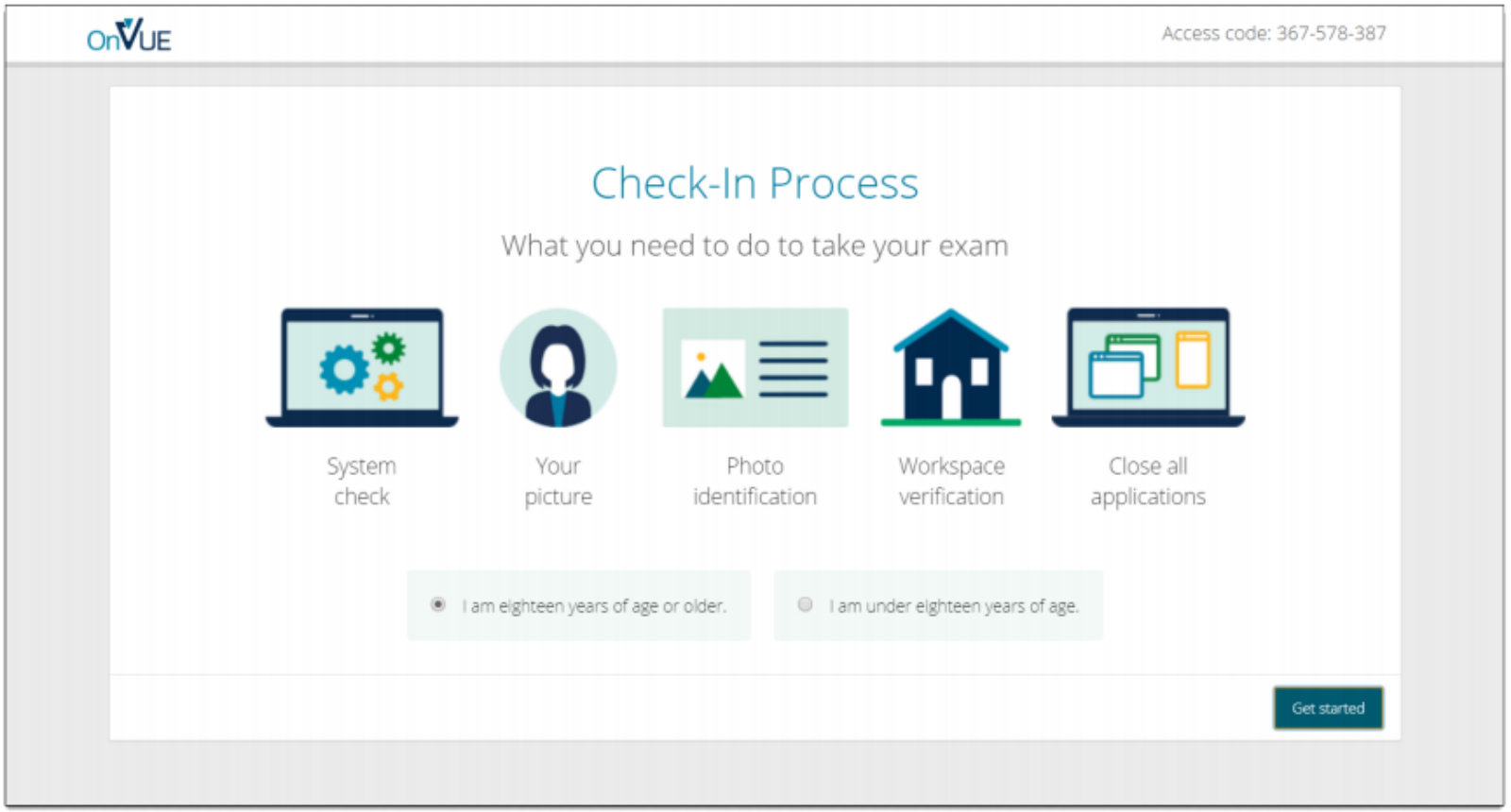
CANDIDATE ONVUE JOURNEY

ENTER PHONE NUMBER



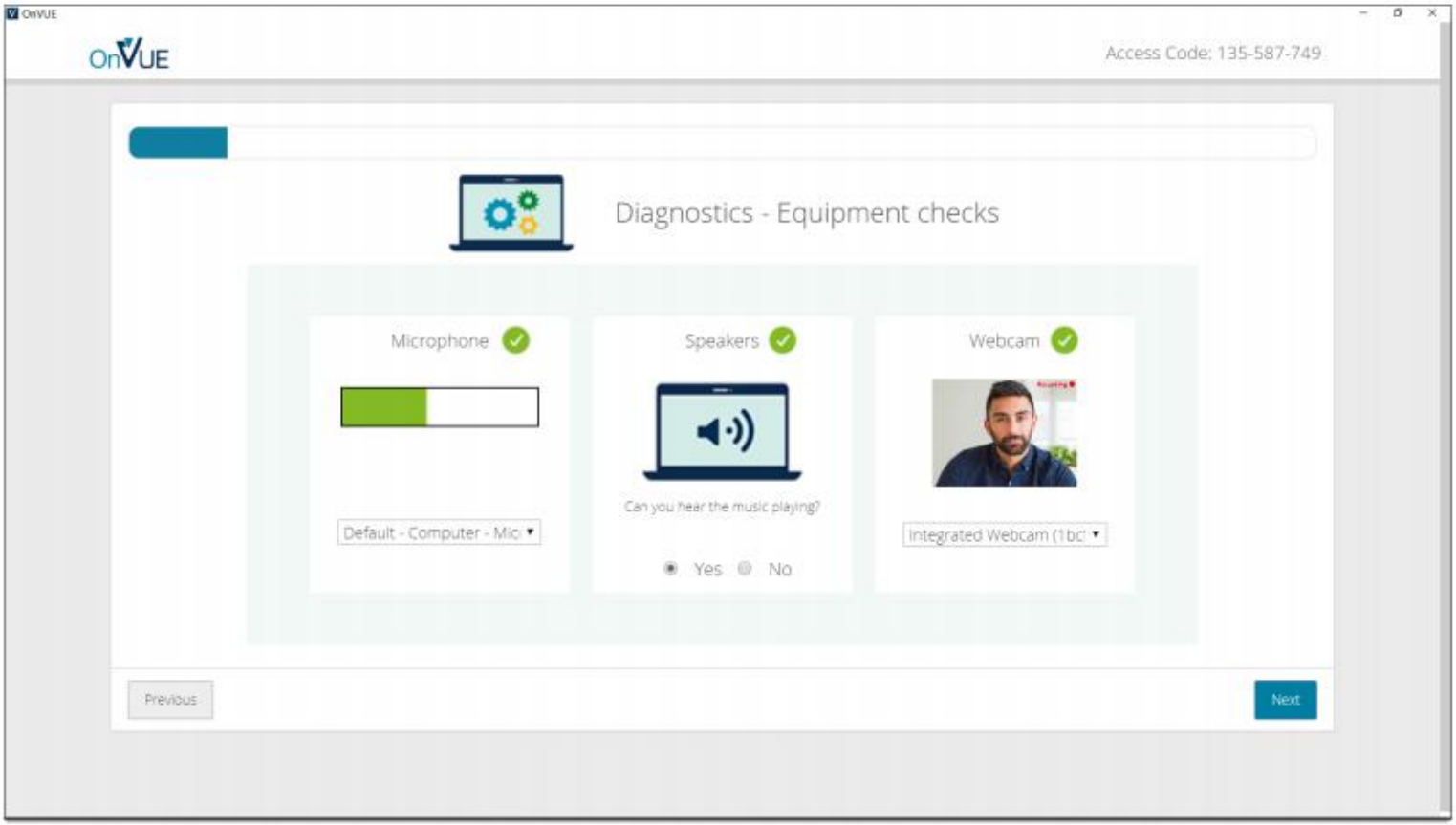
CANDIDATE ONVUE JOURNEY

BEGIN CHECK-IN



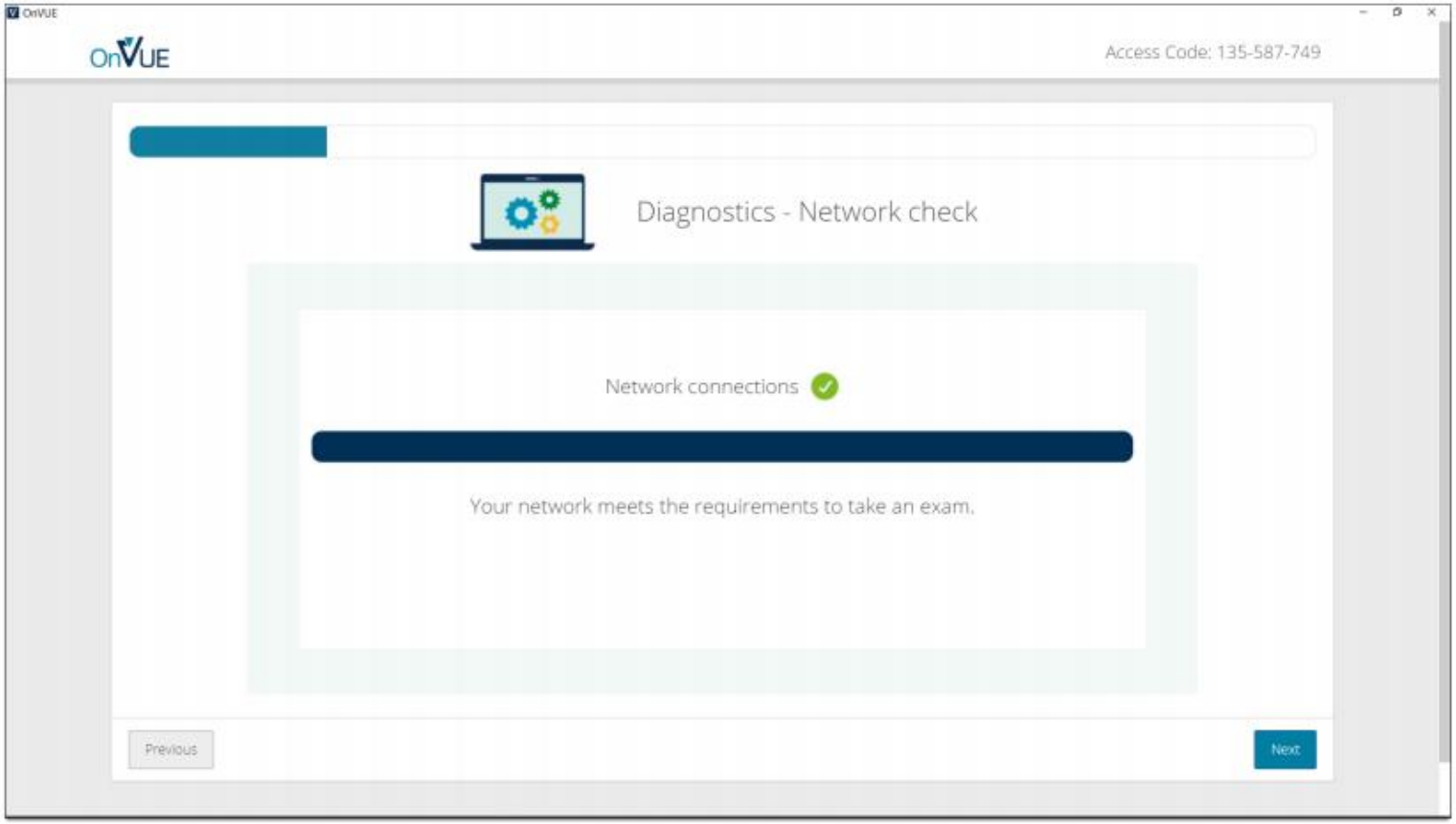
CANDIDATE ONVUE JOURNEY

DIAGNOSTICS — EQUIPMENT CHECKS



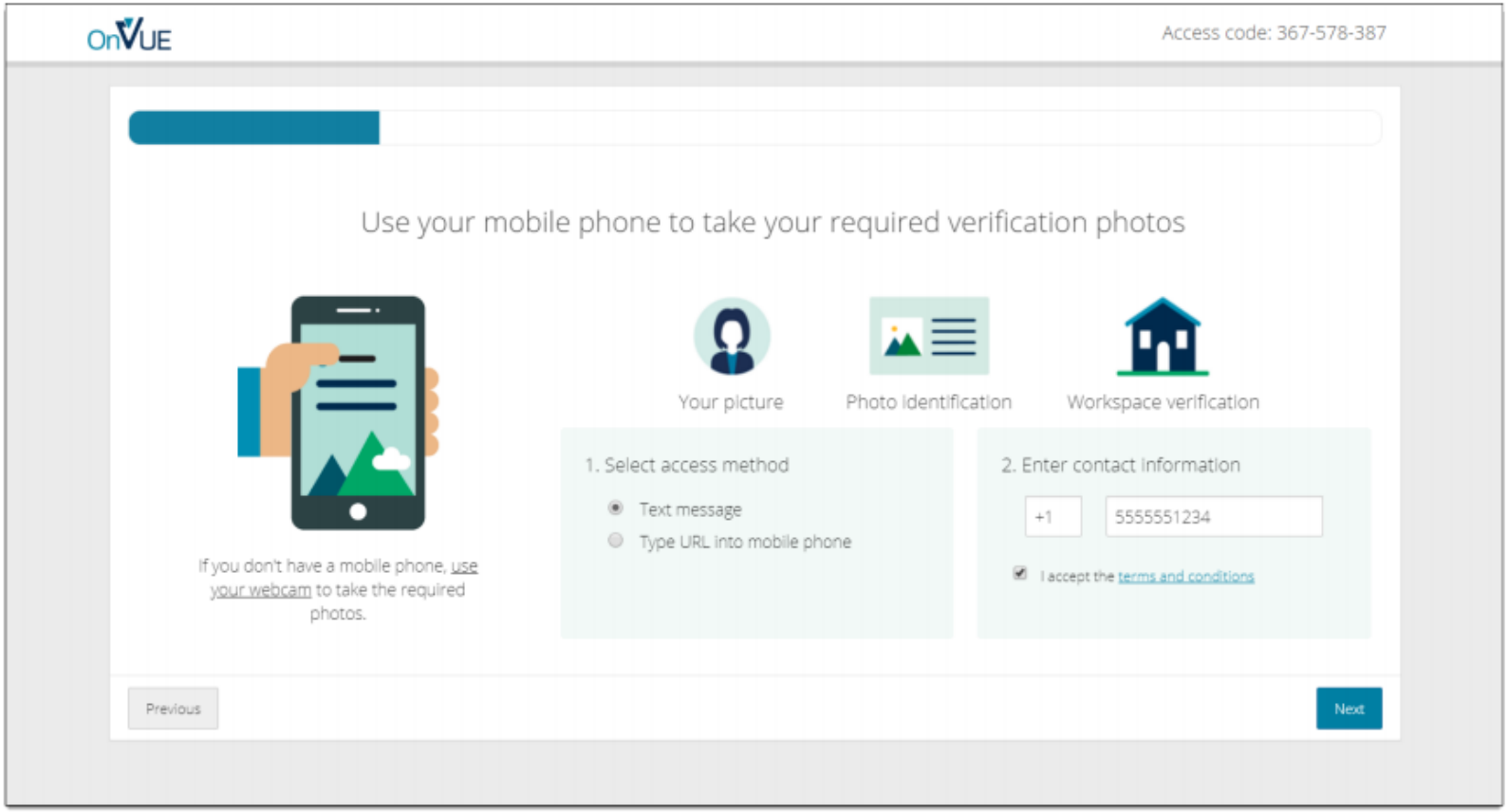
CANDIDATE ONVUE JOURNEY

DIAGNOSTICS — NETWORK CHECKS



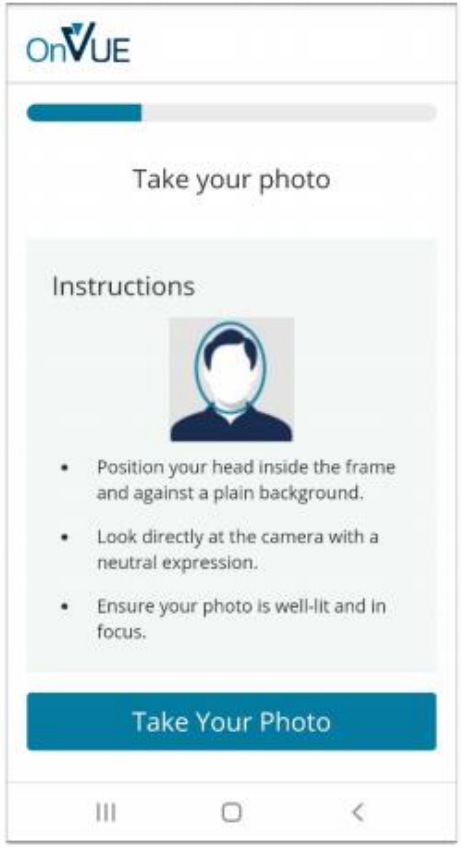
CANDIDATE ONVUE JOURNEY

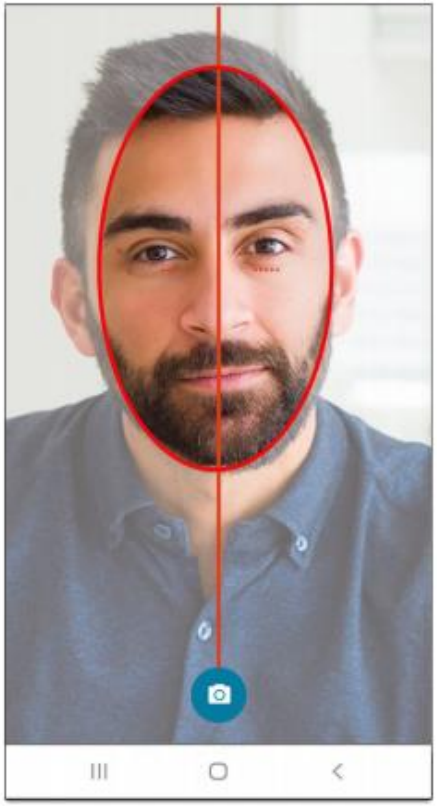
TRANSFER TO MOBILE DEVICE

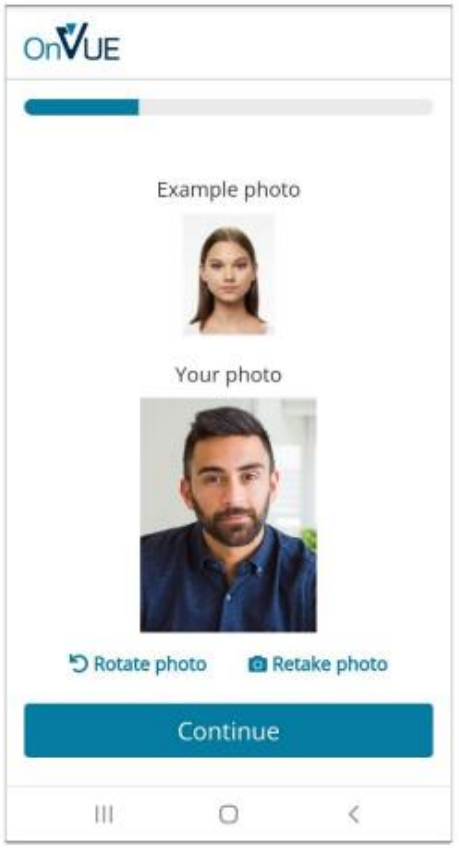


CANDIDATE ONVUE JOURNEY

TAKE HEADSHOT

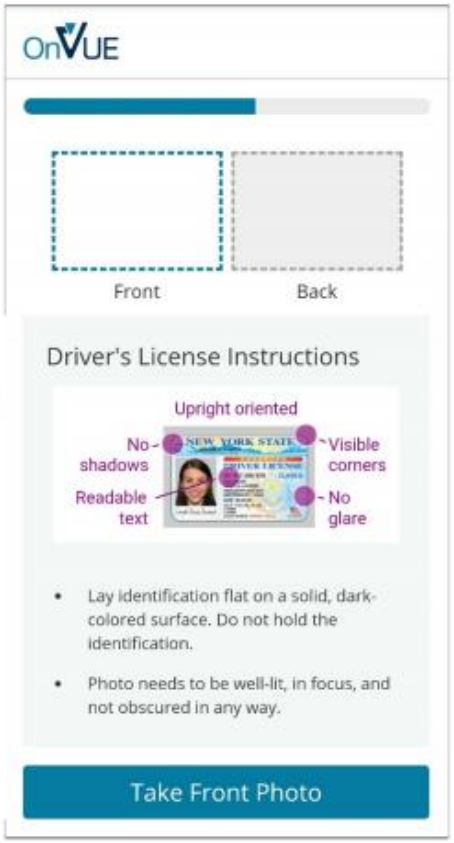






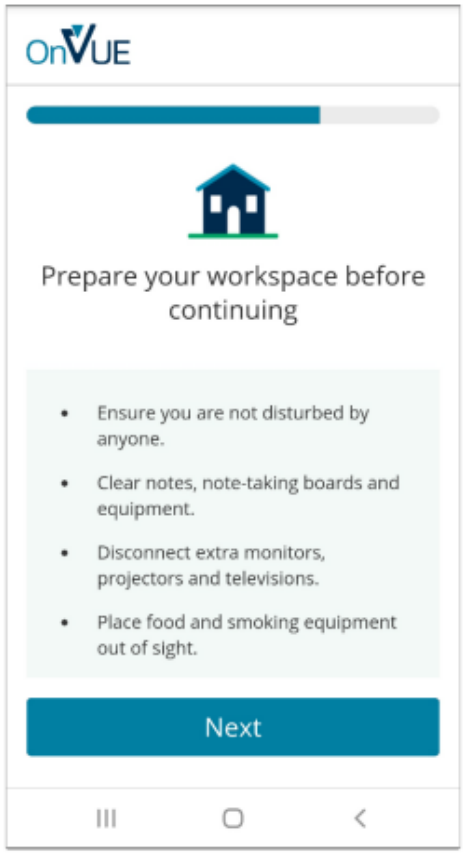
CANDIDATE ONVUE JOURNEY

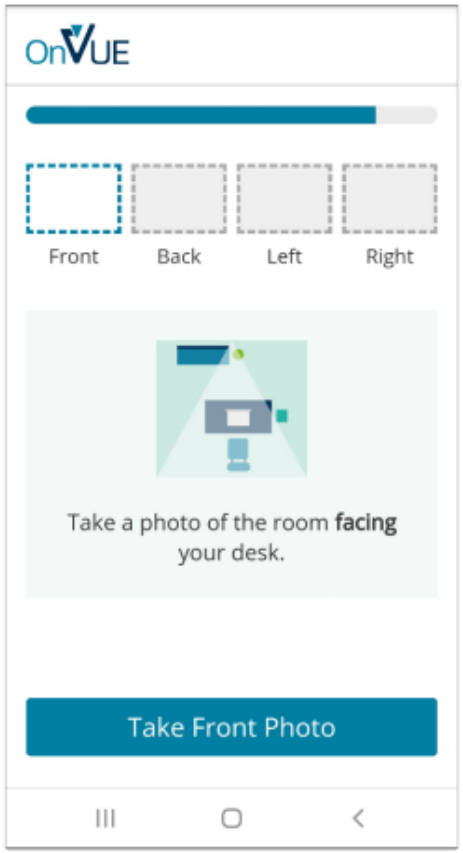
ID VERIFICATION

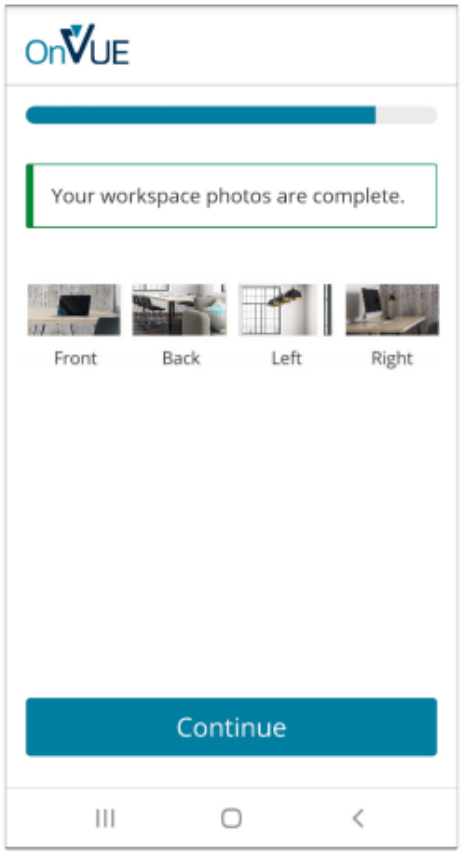


CANDIDATE ONVUE JOURNEY

ENVIRONMENT CHECK

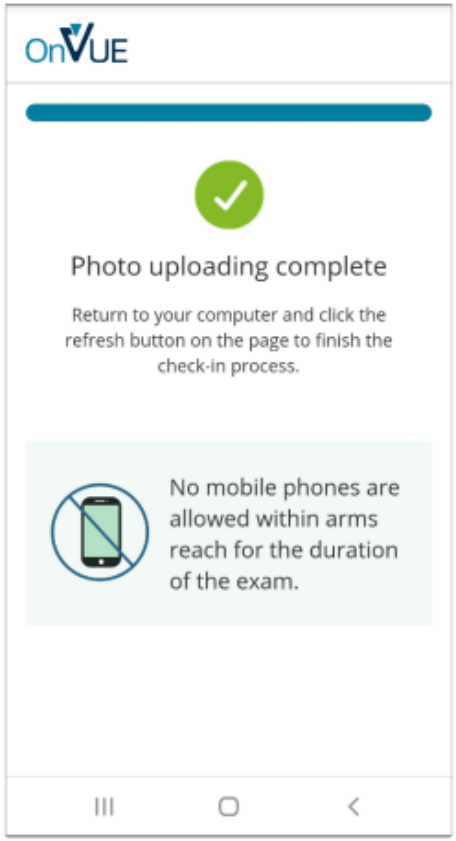






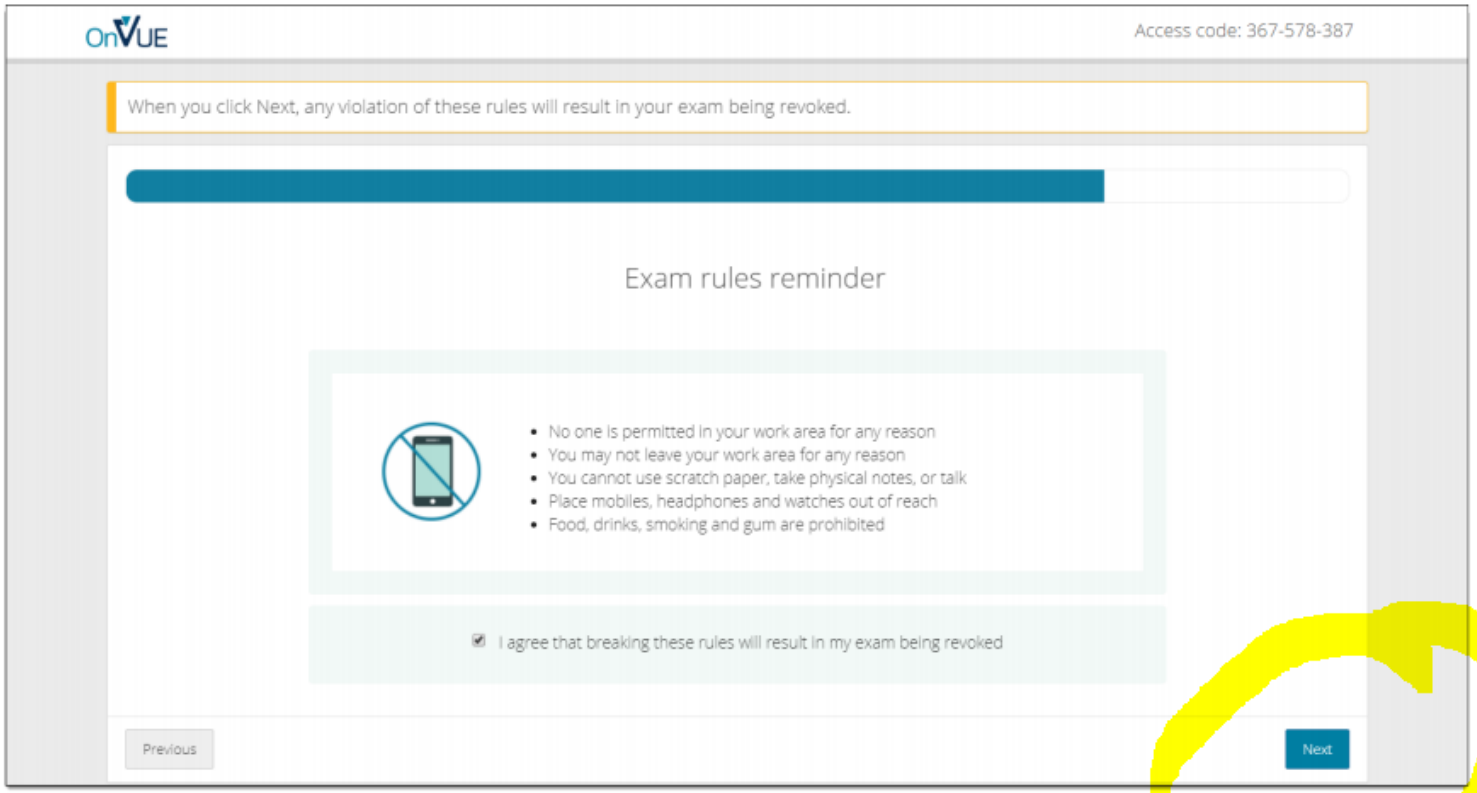
CANDIDATE ONVUE JOURNEY

MOBILE CHECK-IN COMPLETE

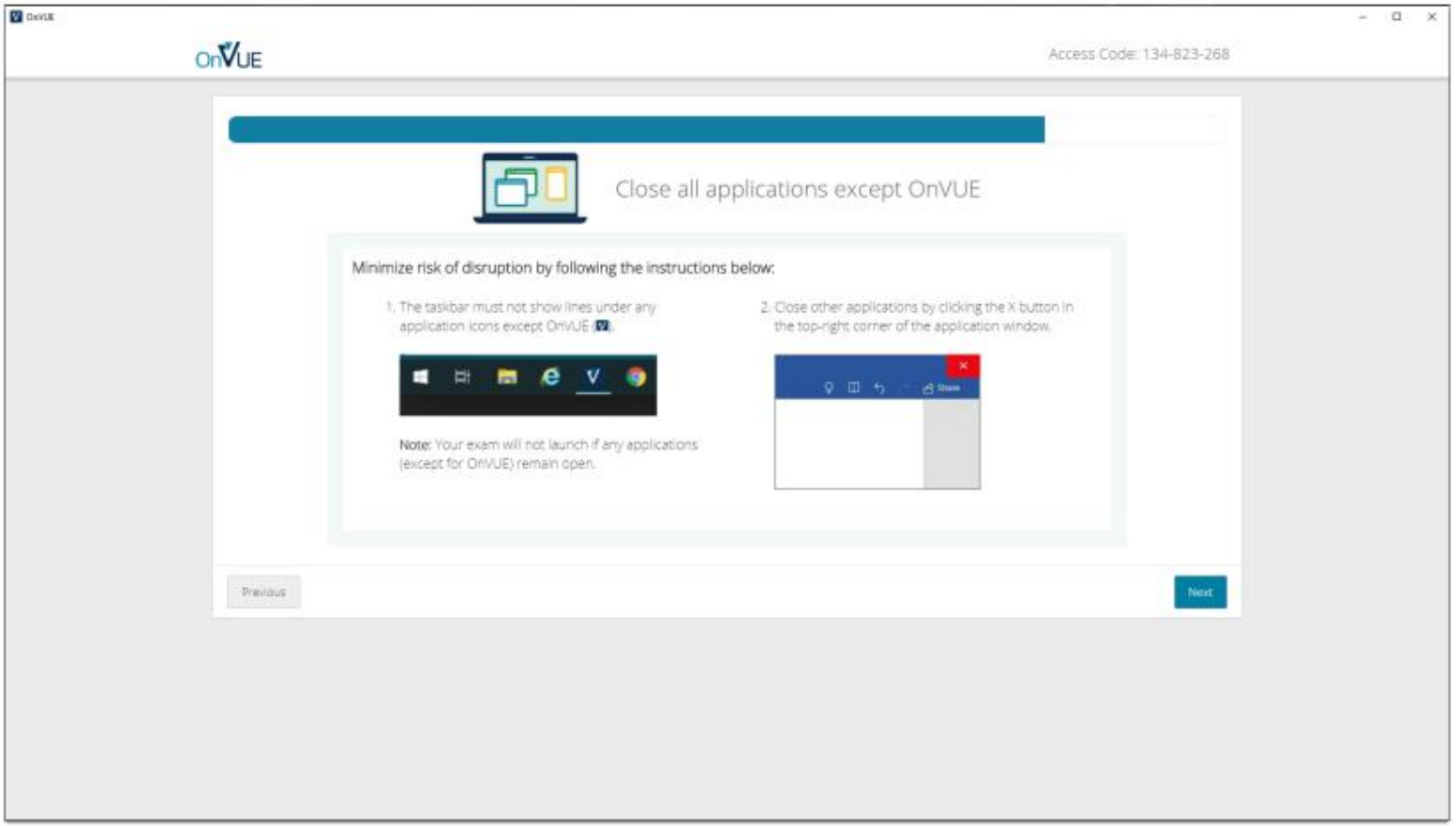


CANDIDATE ONVUE JOURNEY

VIEW EXAM REMINDERS



CLOSE ALL APPLICATIONS EXCEPT ONVUE



CANDIDATE ONVUE JOURNEY

Helpful Messaging if you have a Secure Browser Issue

OnVUE

Access code: XXX-XXX-XXX

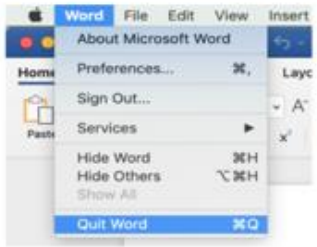
An unapproved application is running, so we couldn't launch your exam.

Make sure all applications are shut down by following the instructions below:

1. The dock must not show dots under any application icons except Finder ( ) and OnVUE ( ).

Note: Your exam will not launch if any applications (except for OnVUE and Finder) remain open.

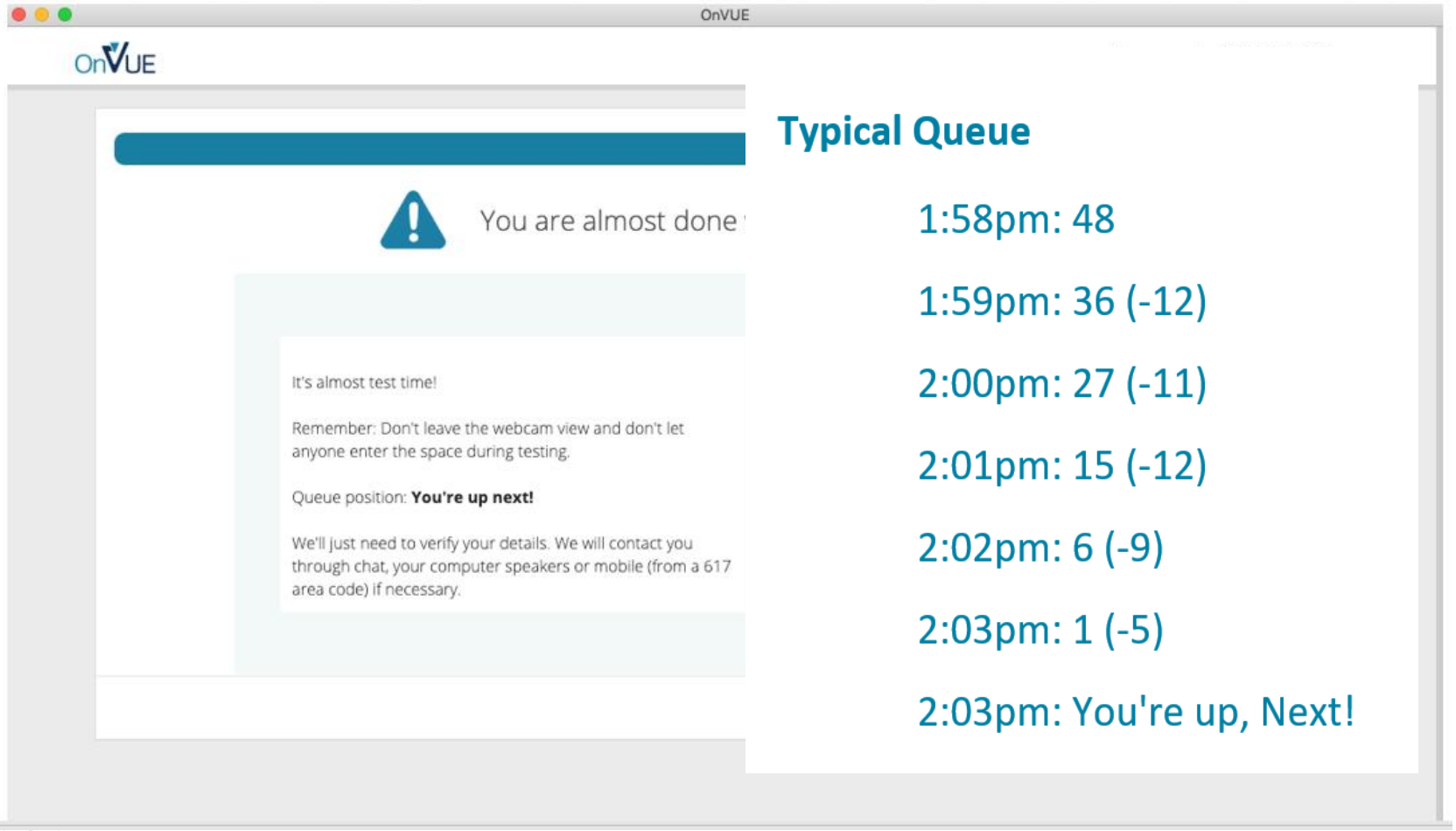
2. Quit other applications via the application menu.



If webcam feed is black, you may be at risk for having your exam revoked.

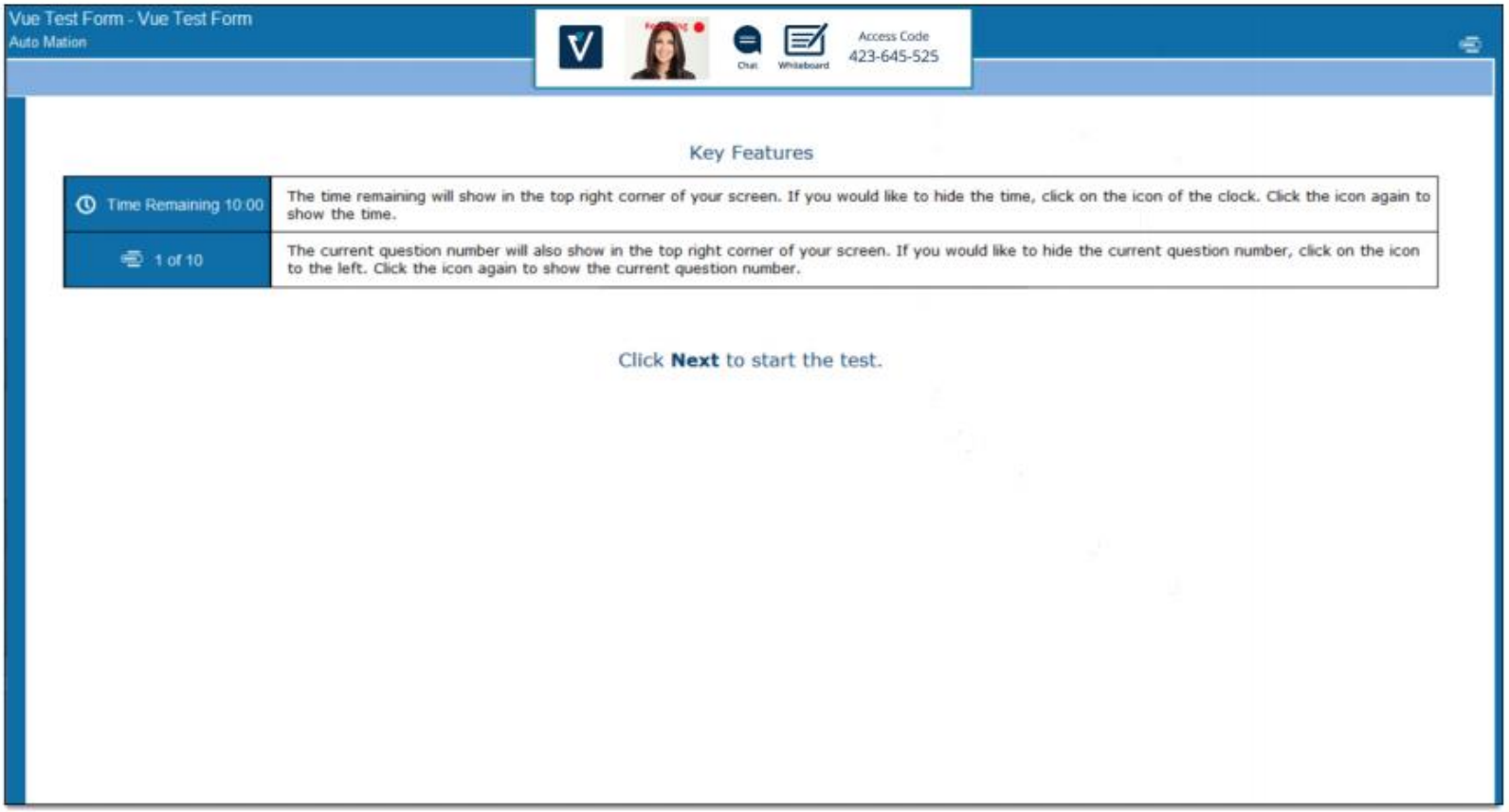
CANDIDATE ONVUE JOURNEY

Check in almost complete. Do not leave the room.



CANDIDATE ONVUE JOURNEY

EXAM IS LAUNCHED



OnVUE
Know the Rules

- Your exam may be stopped and revoked if the rules aren't followed.
- You must stay within webcam view.
- You cannot get up and walk around.
- No one can enter your testing environment.
- You cannot leave your testing environment, until the scheduled break.
- You must be clothed (no hats or hoodies).
- You may have water in a clear glass during testing; however, eating, smoking, and chewing gum are prohibited.
- You may not wear headphones, earbuds or a headset.
- You may not have prohibited items where you can see them or reach for them while sitting in front of your computer. This includes watches, phones, and other prohibited items as described in this document.
- You cannot have in the room or attempt to use study guides, reference materials or other materials during their exam.

CAIA Candidate Policy Manual

Prepare for OnVUE Success

Testing advice for a successful OnVUE testing experience

- Take the system test
- Make sure you have the right equipment
- Use the best internet connection possible
- Prepare your testing environment
- How to start the check-in
- Tips for capturing your photos on first try
- Be careful, you're being recorded
- Technical issues
- Creating a support ticket with Pearson VUE
- OnVUE Reconnection Guide

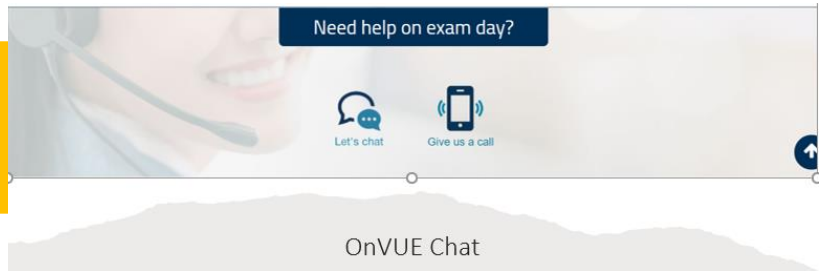
I need help!

Technical difficulties before or during the exam

Access help within exam

- OnVUE customer service via Chat

Via help from Pearson VUE website



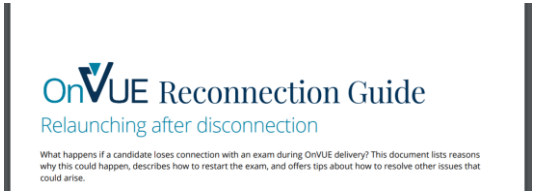
- https://home.pearsonvue.com/onvuehelp

Do NOT wait more than 15 minutes waiting for you exam to launch.

- SEEK ASSISTANCE from OnVue Chat

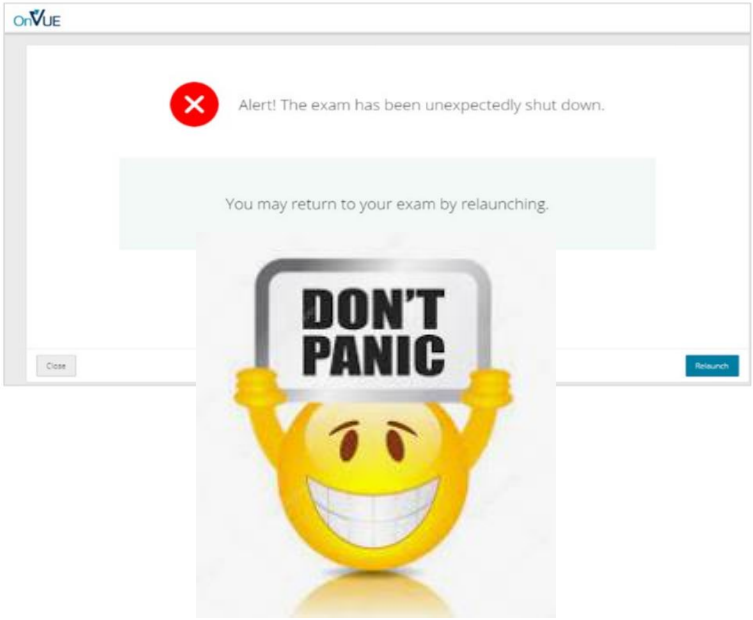
I need help!

OnVUE Relaunching Process



Causes of disruption

- Detection by secure browser of non-permitted application
- Drop in internet connectivity
- Power outage
- Pressing keyboard combinations that close the OnVUE application For example: Alt-F4 in windows quits the application



REVOKED EXAMS

- During Exam
- I have WIFI problems and I can not go back in?
- Someone came into my room and I am disconnected?
- My exam is revoked and I don't know why
- I do not agree with what happened during my exam
  - A case will be created by Pearson VUE which CAIA receives 24 hours later.
  - Please also email us at candidate@caia.org
  - The CAIA team will need up to 48 business hours to review all your exam data for review and determination of next steps
  - The CAIA team will determine on a case by case basis if candidates are eligible to retake the exam that this cycle at no fee.

CANDIDATE ONVUE JOURNEY

Questions?

Thank you!
Good Luck with your Studies!

ONVUE RESOURCES

CAIA ASSOCIATION®

The Global Mark of Distinction in Alternate Investments

1. **General**
   - CAIA Landing Page: https://home.pearsonvue.com/caiaa/onvue

     https://home.pearsonvue.com/op/OnVUE-technical-requirements

     https://home.pearsonvue.com/Standalone-pages/Whiteboard.aspx
   - CAIA Home Page: www.caia.org
     - Preparing
     - FAQs
     - candidate@caia.org
2. **Launch Your Exam**
   - CAIA Home Page: www.caia.org
   - Need help? OnVUE Chat: https://home.pearsonvue.com/onvuehelp
3. **During your exam**
   - Need help? OnVUE Chat: https://home.pearsonvue.com/onvuehelp