

CALIFORNIA ESCROW ASSOCIATION

PROFESSIONAL DESIGNATION TESTING:

Instructions for Test Proctors

PRIOR TO THE EXAM

I. PREPARING FOR EXAM:

- A. TEST DATE:** Test dates are scheduled with the Professional Designation committee/chair at board meetings. A minimum of seven (7) candidates are required to schedule an exam in a specific region or area. Test dates are published in the *CEA News* and the website.
- B. TEST SITE:** The proctor is responsible for locating a test site that is conducive to the testing program.
- C. REVIEW THE TEST SITE:** As proctor, you should review the test site prior to the test date. Items to look for:
1. Coffee machine and supplies - ask if they may be used. If not, arrange for a coffee pot, supplies and cups.
 2. Tables for food and beverages
 3. Conference, lunch/break room and set-up
 4. Office and/or individual desk arrangements
 5. Parking

Ideally, the test site should be set up as follows:

- * One room for proctors and test materials to organize and grade test
- * One room for candidates during roll call, lunch & sign-in for oral interview

(Note: It may be necessary for you to assign office and/or desks for the candidates).

- D. SITE INFORMATION:** It is necessary to provide headquarters with a complete address and phone number of the test site. **Please ensure that the number you provide can be used on the day of the exam.**
- E. FOOD AND BEVERAGE:** CEA does not reimburse for any food and/or beverages for candidates and proctors. You should contact the regional association, affiliated membership, or local companies to provide the following:
1. Coffee and supplies, if not already arranged with the site.
 2. Donuts, rolls, muffins
 3. Pot luck or boxed lunches for proctors
 4. Sodas and water
 5. Garbage bags, paper towels and spray cleaner

PLEASE BE SURE NOT TO LEAVE TEST MATERIALS, TRASH, OR FOOD AND BEVERAGES AT THE TEST SITE.

F. CANDIDATE TEST-NOTIFICATION PACKET: A notice of candidacy for examination is sent to all test candidates once their test application has been approved by the State PD committee chair, along with a copy of a map and important test site information. The following exam schedule is enclosed in the letter to the candidates:

8:30 am	Roll Call (all candidates except retakes Oral Interviews and/or TF/MC portions)
9:00 am - 11:30 am	Escrow Problem for CET (2 1/2 hours) Full CEI Test (MC/TF)
9:00 am– 12:00 pm	Escrow Problem for CEO, CSEO, CBSS, CMHS (3 hrs)
10:30 am - 12:30 pm	Oral Interview and Lunch Break
1:00 pm	Roll call and instructions for afternoon exam
1:15 pm – 3:15 pm	True/False and Multiple Choice Exam CET (2 hours)
1:15 pm – 4:15pm	True/False, Multiple Choice Exam – CEO, CSEO, CBSS, CMHS (3 hours)

G. TEST MATERIALS BOX: CEA headquarters will send the test materials box to you **7 business days** before the exam. **It is extremely important that you review the materials in the box PRIOR to the exam (preferably four days) to verify all items required are enclosed. In the event items are missing, notify headquarters immediately.** The following items will be included in the box:

1. Two (2) copies of *Instructions for Test Proctors*
2. One (1) copy list of candidates and notation as to whether they are taking the full exam or the portion(s) to be re-taken.
3. PD Form #102 - Candidate Identification Form (Exhibit A)
4. All candidates will have their own folder which will have their last name, first name and exam along with their ID #. All folders will include all test materials needed for the exam except the Orals.
6. Scantron answer sheets (Exhibit F.): A total of three answer sheets are required for each candidate (except for those doing less than the complete exam) - ONE (1) per candidate is required for the Escrow Problem portion of the test and TWO (2) per candidate are required for the True/False and Multiple Choice portion of the exam (included in the candidate folders)
7. True/False and Multiple Choice exams marked for the particular test (included in candidate folder).
8. Oral Interview questions for each particular test
9. Oral Interview Evaluation Sheets - PD Form #108 (Exhibit C) - use three (3) per candidate
10. Escrow Problem for all tests – marked for the particular test (included in candidates folders)
11. Critique Sheets - included in candidate folder (Exhibit D)
12. #2 Pencils
13. Recap Sheets - PD Form #104 (included in candidate folder)(Exhibit E)
14. Continuing Education Form - PD Form #501 (Exhibit B)
15. At least two extra copies of each test

You should bring the following items to the test site in addition to the materials in the box:

- * Post-it notes
- * #2 Pencils
- * Rubber bands
- * Paper clips
- * Stapler and staples
- * Liquid paper
- * Large face clock
- * Continuing Education stamp for PD Forms #501
- * Scratch paper
- * Calculator
- * Trash bags
- * Additional Batteries

REMEMBER TO TAKE AN INVENTORY OF ALL TEST MATERIAL BEFORE AND AFTER THE EXAM. YOU SHOULD NOT BE MISSING ANY EXAMS.

II. ORGANIZING FOR THE EXAM:

- A. Each candidate should receive the following materials at the exam (these items are in each candidates folder):
- * PD Form #102 – Candidate Identification Form (Exhibit A)
 - * Critique sheet (Exhibit D)
 - * Three (3 if taking all 3 portions) Scantron Answer Sheets (narrow) (Exhibit F)
- B. Please line out on the PD #104 (Exhibit E) the “CEO”, “CSEO” or “CET” portion, whichever one the candidate is not taking and any other non-applicable portions for candidates who are not required to take the full exam.

There should be three (3) PD Form #108 (Oral Interview Evaluation Sheets [double-sided] – Exhibit C) for each candidate taking the oral exam. Proctors should fill in the test number and candidate ID number just prior to administering the oral exam.

(Note: You are responsible for completing the scores for the oral and fill-in-the-blank portion of the escrow problem on the Recap for Scoring of Candidates (PD Form #104 - Exhibit E) on the day of the exam. Be sure you also circle “PASS” or “FAIL” at the bottom of the form for anyone taking the oral exam).

- C. Each True/False and Multiple Choice exam folder should have two (2) scantron answer sheets (Exhibit F)

III. PROCTORS:

Get confirmation for all test proctors. Depending on the number of candidates, you should only need about four to five proctors for the morning Problem Portion of the exam. Proctors conducting the Oral Portion and grading the fill-in-the-blank portion should arrive around 10:00 a.m. to review the oral questions.

It will be necessary for you to appoint proctors for each of the following exam portions: (1) Escrow Problem; (2) Oral Interview Coordinator; (3) Oral Interview Runner; and (4) True/False and Multiple Choice. Their duties are as follows:

A. Escrow Problem and True/False and Multiple Choice Proctors:

- * Ensure that all candidates are set up at their exam desks/tables and that all materials other than pencils, scratch paper, calculators, answer sheets and test packets are removed from the desk/table top.
- * Give candidates any instructions not already covered by the PD Exam Proctor/Chair.
- * Begin the exam by announcing the time of commencement.
- * Ensure that each candidate is using the correct answer sheet.
- * Maintain a low level of noise.
- * Ensure that candidates who leave the exam area check in and out with the proctor. Note: No extra time will be allowed when a candidate leaves the test area for bathroom and/or smoking reasons.
- * Announce time remaining on the exam at half time, thirty (30) and fifteen (15) minutes prior to the end of the exam.
- * The problem exam lasts exactly two and one half (2 1/2) hours from the commencement time *for the CET* and three (3) hours for *CEO, CSEO, CBSS and CMHS*.
- * The true/false/multiple choice exam lasts exactly 2 hours from the commencement time *for the CET* and 3 hours for *CEO, CSEO CBSS and CMHS*.
- * The *CEI* test is 75 questions each of true/false test and multiple choice test and lasts 2 ½ hours
- * Collect test materials from candidates (forms and materials, answer sheets, scratch paper and calculator tape). If applicable, direct the candidates to the Oral Exam after the Escrow Problem Portion.
- * Discard and shred scratch and calculator tape. Paper clip the exam material and forms together for each candidate and deliver them to the Exam Proctor.

B. Oral Interview Coordinator:

- * Set up your Interview Teams, which ideally consist of one (1) captain and two (2) members, from among the available proctors at the test site. However, a two-member team will suffice. **All interviewers must be a CSEO.**
- * Establish interview areas such that the candidate faces the three (or two) interviewers.
- * Review all questions and acceptable answers with the team members in advance and instruct them on how to properly complete PD Form #108 (Exhibit C).
- * Coach the teams on trying to make the candidate feel at ease.

- * Instruct each Team of the following Interview procedures: Team members will note on the front of the score sheet the question number asked of the candidate and if they failed the reason(s) why the member failed the candidate. **All grading should be independent and not a group effort.**
- * ID Numbers should be written on three (3) Oral Interview Evaluation Sheets PD Form #108 (Exhibit C) for each candidate signing in for the Oral Interview. Candidates should be called in the order in which they appeared for sign-in.
- * Separate those candidates who have completed their interviews from candidates who have not taken the Oral Exam.
- * When an interview and the PD Forms #108 are complete, the Team Captain should indicate that the Team is ready for another candidate by raising his/her hand to the Oral Interview Runner. The Runner will return all PD Forms #108 to the Oral Interview Coordinator, who will attach them with the morning testing material and forms for each candidate.

C. *Oral Interview Runner:*

- * Distribute Oral Interview Questions to all Team Members (only if a CSEO).
- * As a Team becomes available, obtain the next candidate's PD Forms #108 (Exhibit C) from the Oral Interview Coordinator and escort the candidate to the available team. Note: Ideally a candidate should not be acquainted with any of the Team Members.
- * Introduce the candidate by candidate number to the team members and advise the team members of the exam level, i.e. "CEO", "CSEO", "CBSS or "CMHS"
- * When an interview is complete, the Team Captain will advise you by raising his/her hand, indicating that the Team is ready for the next candidate. After you have introduced the candidate, collect the PD Forms #108 for the previous candidate and give it to the Oral Interview Coordinator.
- * When the interviews are complete, collect all of the Oral Interview questions and give them to the Exam Proctor.

DAY OF THE EXAM:

I. *ADMINISTERING THE EXAM*

A. *Final Preparations:*

On the day of the exam you should:

- * Arrive early with at least one (1) assistant. Survey the test site for potential problems. Set-up food, beverages and proctor table.

- * Hand out the following to candidates taking *full-test*: Candidate Identification Form, Critique Sheet and three (3) Scantron Answer Sheets which **should be** included in their folders with their names and section of test on them.
- * Hand out the following to candidates taking *problem portion only*: Candidate Identification Form, Critique Sheet and appropriate Scantron Answer Sheet which **should be** included in their folders with their names on them.
- * Hand out the following to candidates taking the *CEI* and the *MC/TF only*: Candidate Identification Form, Critique Sheet and the two (2) appropriate Scantron Answer Sheets which **should be** included in their folders with their names on them.

(Note: **Candidates have been instructed to arrive by 8:30 a.m.**)

- * Introduce yourself and the other proctors and begin Roll Call:
- * Call roll by using the candidate attendance sheet provided to you by headquarters. As you call each candidate's name, you should confirm with him/her the (8) digit I.D. number is on all paperwork. **All digits including any leading zeroes must be used on all material or the results of the exam will be delayed.**
- * Remind candidates that if they choose to keep pagers and/or cell phones turned on and get interrupted, their time will not be extended.
- * . Candidates can write on the problem section of the test only. No writing on the TF/MC portion of the test. Use scratch paper for that.

II. PREPARING THE EXAM DOCUMENTS WITH THE CANDIDATES:

(Please instruct the candidates to use a #2 Pencil to complete the following documents).

A. I.D. Form - PD Form #102 (Exhibit A):

You should instruct each candidate to:

- * Print his/her name **exactly as he/she wants it to appear on his/her plaque.**
- * Candidate to keep form until all materials are handed in at one time all together. Put form off to the side.

B. Scantron Answer Sheet – narrow (Exhibit F): There is a large simulation of this form in the box for your use. The candidates should:

- * Verify that their names and all digits (including any leading zeroes) of the I.D. number are on both sides of the form on all three forms.
- * Fill in the corresponding bubbles for their I.D. numbers on all three forms on the front and back.
- * Keep one completed form close by for the Escrow Problem portion of the exam. The remaining two forms should be put off to the side and will be used in the afternoon for the TF/MC portions of the exam.

- C. Critique Sheet (Exhibit D):** The candidates should fill this form completely and turn it in at the end of the examination.

III. GIVING THE CANDIDATES A BRIEF SYNOPSIS OF THE EXAM PROCEDURES:

A. General Exam Chronology:

Escrow Problem Portion in the morning
 Oral Interview: Sign-in
 Lunch
 TF/MC Portion in the afternoon

Note: Calculators are required for the morning and afternoon sessions. The candidates should not leave the test site unless they can return in time for the next session.

B. To be announced to the candidates:

Results will be mailed to you within three (3) weeks of the test date. **PLEASE DO NOT CALL HEADQUARTERS OR THE PROFESSIONAL DESIGNATION CHAIR FOR THE TEST RESULTS.** In addition, Regional P.D. Chairs or employers are not to call headquarters for the results. Everyone has received a Candidate Information letter, which explains the grading process and time frames for receiving test results. The address you have completed on your I.D. form (P.D. Form #102) is the address to which your notification will be mailed.

Should you not pass any portion of the exam, you will be notified and provided with an Application for Re-Take. The cost of re-taking any portion of the exam will be noted on the re-examination application. Should you fail ONE (1) or more portions of the exam, you will have 18 months from the month you took your original exam in which to successfully re-take the portion(s). In the event the allotted time has lapsed and you have not passed the portion(s), you will be required to take the entire exam over.

The Professional Designation Chair and your Regional Association President will be notified only if you have passed the entire exam. You are the only person notified when you fail any portion of the exam.

IV. GETTING STARTED WITH THE ESCROW PROBLEM PORTION:

- A.** Remove the correct test folder from the box and distribute it to each candidate. All full test takers should have a package for the Escrow Problem, and a package for the TF/MC.

Review the contents of the test folder with the candidates to ensure that they have all the testing materials and that they have received the correct test. You should review these folders prior to the test date also.

Advise the candidates that they may write on any portion of the Escrow Problem test materials:

CET's: Total of 280 points possible with 196 points required to pass

CEO,CSEO, CBSS, CMHS's: Total of 600 points possible with 450 points required to pass

CEI: Total of 150 points possible with 105 points required to pass

Do no more or no less than what the instructions tell you. If the instructions do not tell you to pay the next installment of taxes or the loan payment, DON'T DO IT. The instructions may not be what is customary in your area and may not reflect your company policy. The exam is testing your ability to follow instructions as well as your overall knowledge.

Read the following to the test takers: "If you are taking the CEO, CSEO, CBSS, CMHS exams your test is now in the new format, based on the CAR Contract. Your General Instructions will provide only the information that is not included in the CAR Contract portion of your test. It is not necessary to read the entire contract in detail, only to read those portions in detail which apply to your test and the questions associated with it. Information needed for test answers from the contract can be found in the appropriate areas of the contract, just as they would appear in any well-written contract received on your desk in your day-to-day business. We will let you know when half of the time has elapsed and then at 30 minutes prior and 15 minutes prior to the end."

B. Depending on the exam the candidate is taking (CET, CEO, CSEO, CBSS or CMHS) the questions on the Escrow Problem are fill-in-the-blank questions. Instruct the candidates to "X" through with a PEN on the narrow Scantron Answer Sheet as follows:

- **First 21 answers for the CET**
 - **First 35 answers for the CEO**
 - **First 25 answers for the CSEO**
 - **First 24 answers for the CBSS**
 - **First 21 answers for the CMHS**
- * Instruct the candidates to transfer the answers from the settlement and disbursement sheet to the fill-in-the-blank answer sheet.
 - * The remainder of the exam is multiple choice and will be completed on the Scantron Answer sheet.
 - * Instruct the candidates to: "Please be sure to use #2 Pencils and that the bubbles are filled in completely. Be sure to erase completely as the grading machine is very sensitive and could pick up the wrong answer. Also be sure

that the number on the exam corresponds with the number on the scantron answer sheet. Both sides of the scantron sheet are required to complete the entire exam.”

- C. Make sure that the candidates have set up for the exam and instruct the proctor to call the time to commence the exam. CEO, CSEO, CBSS and CMHS candidates **a full 3 hours to complete the exam**. CET and CEI candidates have a full 2 ½ hours to **complete the exam**. The proctor should also advise the candidates when one-half of the time remains, then when 30 minutes and 15 minutes are remaining for the exam.

As the candidates finish with this portion of the exam, all test materials, including answer sheets, scratch paper and calculator tape shall be returned to the proctor. The proctor shall then instruct the candidates to sign-in with the Oral Interview Coordinator if applicable. **DO NOT LET CANDIDATES LEAVE WITHOUT MAKING SURE YOU HAVE COLLECTED ALL OF THEIR TEST MATERIALS**. Please be sure to shred all scratch paper and calculator tape. Review the exams for any writing and separate those which have been written on from those that have not. Return all exams and answer sheets to the Exam Proctor.

V. ORAL INTERVIEW PORTION

Each question to be used in the Oral Interview should be reviewed by the proctors who will be assisting with that portion of the exam.

A. Preparation:

- * The Oral Interview Coordinator should review the procedures and questions in the morning during the Escrow Problem portion of the exam. Note: Differing answers could be a result of different area customs and should not be considered wrong answers.
- * Review the PD Form #108 - Oral Examination Interview Evaluation Sheet (Exhibit C) and instruct the proctors on how to complete it with the date, exam number and name.
- * Discuss the scoring technique with regard to: (1) Three areas of grading and (2) point structure. All answers asked per candidate must be circled on the review side of the PD Form #108. If the candidate failed to answer a question correctly, remarks must include the question number and the reasons why the answer was incorrect in the event that the candidate fails the Oral Interview. **All grading should be independent and not a group effort.**
- * Discuss the number of questions a candidate should be asked, which may vary depending on how the candidate responds with regard to demeanor and accuracy. The team should ask just enough questions to get a feel for the candidate's ability. An average of three (3) to five (5) questions should be used per candidate. The interview should last approximately seven (7) minutes unless there is a problem with a candidate.

B. The Interview:

- * The team captain will begin the interview by asking what type of entity the candidate works for, has he/she worked with any other type of entity, how long has he/she been in the business, whether he/she works in Southern California or Northern California and what is his/her position. **DO NOT ASK THE CANDIDATES THEIR NAMES OR THE NAMES OF THEIR EMPLOYERS.**
- * The interviewers should introduce themselves by name and by the type of entity for which they work.
- * Allow each candidate two (2) minutes at the beginning of the interview to feel comfortable before asking any questions.

When the Oral Interview is complete, the Oral Interview Coordinator will calculate the score accordingly for CEO, CSEO, CBSS and CMHS Candidates:

- a) With a three-member team - 180 points are possible with 120 points required to pass.
- b) With a two-member team - 120 points are possible with 80 points required to pass.

For CET Candidates:

- a) With a three-member team - 90 points are possible with 60 points required to pass.
- b) With a two-member team - 60 points are possible with 40 points required to pass.

VI. TRUE/FALSE AND MULTIPLE CHOICE PORTION:

After the Oral Interview and lunch, the candidates should gather in the meeting room to begin the afternoon portion of the exam. As you call roll, you should hand out the appropriate CET, CEO or CSEO exam tests for each candidate, which is in the box/in the candidate folders sent from headquarters.

A. Instruct the candidates to:

- * If the candidate(s) did not completely fill out all three (3) Scantron Answer Sheets (Exhibit F) that morning, they may take a few minutes at this time to complete them with their names and I.D. numbers on **both** sides of the form.
- * Carefully read the instructions enclosed with the exam packet. One (1) of the Scantron Answer Sheets is to be used for the True/False portion and one (1) is to be used for the Multiple Choice portion of the exam. Read the following to the candidates: ***You may choose to begin with the Multiple Choice portion first, as the answers are worth 3 points each. If you choose to do this, be sure that the question number corresponds with the number on your Scantron Answer Sheet. It is a good idea to periodically check that your question numbers are corresponding to the number on your answer sheets.***

- B.** Make sure that the candidates are set up for the exam. The proctor will call the time to commence the exam. The CET candidates have a full 1 ½ hours which to complete the exam; the CEO, CSEO, CBSS, CMHS candidates have a full 2 ½ hours to complete the exam. The proctor should also advise the candidates when 30 and 15 minutes are remaining for the exam period.

REMIND CANDIDATES NOT TO WRITE ON THE TRUE/FALSE & MULTIPLE CHOICE TEST MATERIALS. (SCRATCH PAPER SHOULD BE PROVIDED).

CET: There are a total of 150 points with 105 points required to pass.

CEO, CSEO, CBSS and CMHS: There are a total of 600 points with 450 required to pass. Each Multiple Choice question is worth 3 points and the True/False questions are 1 point each.

Instruct Candidates to always mark an answer, even if they are unsure, as a blank bubble will be marked as incorrect. Do not seal the envelope that the test is in as these test materials are reused.

- C.** As the candidates finish with this portion of the exam, all test materials, including answer sheets, scratch paper and calculator tape shall be returned to the proctor. **DO NOT LET ANY CANDIDATES LEAVE WITHOUT MAKING SURE YOU HAVE COLLECTED ALL OF THEIR TEST MATERIAL.** Please be sure to discard all scratch paper and calculator tape. Review the exams for any writing and separate those which have been written on from those that have not. Return all exams, answer sheets and critique sheets to the Exam Proctor.

VII. COMPLETING THE EXAM PROCESS - GRADING AND RECAPPING:

A. Grading the Escrow Problem:

- * Proctors should have lunch and grade the fill-in-the-blank portion of the Escrow Problem after the True/False & Multiple Choice exam has begun.
- * The Exam Proctor should pass out all the test folders to the proctors and read the correct answers with the corresponding number of points.
- * The number of points should be added up with the total of correct points placed on the upper right hand corner of the fill-in-the-blank answer sheet.

B. Completion of the Recap for Scoring of Candidates:

- * The Exam proctor should create files for each candidate by using his/her Escrow Problem statement and disbursement folder as the test materials are returned.
- * Using the Recap (Exhibit E) for scoring of candidates, complete the fill-in-the-blank score and the Oral Interview score on the appropriate lines. **Also indicate whether the candidate passed or failed the Oral Interview.**

C. Candidate Folders: When the entire exam is complete and all test materials have been returned, each candidate folder should contain the following (in order from top to bottom using settlement and disbursement folder and file cover):

- * Recap for scoring of candidates (Exhibit E)
- * Oral Interview Evaluation Sheets (2 or 3) (Exhibit C)
- * Escrow Problem fill-in-the-blank Answer Sheet
- * Scantron Answer Sheets (3) (Exhibit F)
- * Candidate Identification Form (Exhibit A)
- * PD Form #501 (Exhibit B)
- * Critique Sheet (Exhibit D)

REVIEW EACH FORM TO ENSURE THAT THE BUBBLE AND WRITTEN INFORMATION HAS BEEN PROPERLY COMPLETED.

All other test material should be placed back in the box in the appropriate files with the exception of test material which has been written on. Place these items in an envelope and indicate that the items contained therein need to be destroyed.

REMEMBER TO TAKE AN INVENTORY OF ALL TEST MATERIAL BEFORE AND AFTER THE EXAM. YOU SHOULD NOT BE MISSING ANY EXAMS. Before leaving the test site, check all test areas to be sure that all materials have been returned or discarded.

On the next business day following the exam, forward the box to:

California Escrow Association
2520 Venture Oaks Way Suite 150
Sacramento, CA 95833
916.239.4075