

ESG Investing 考试流程（一）：预约考试及退改期

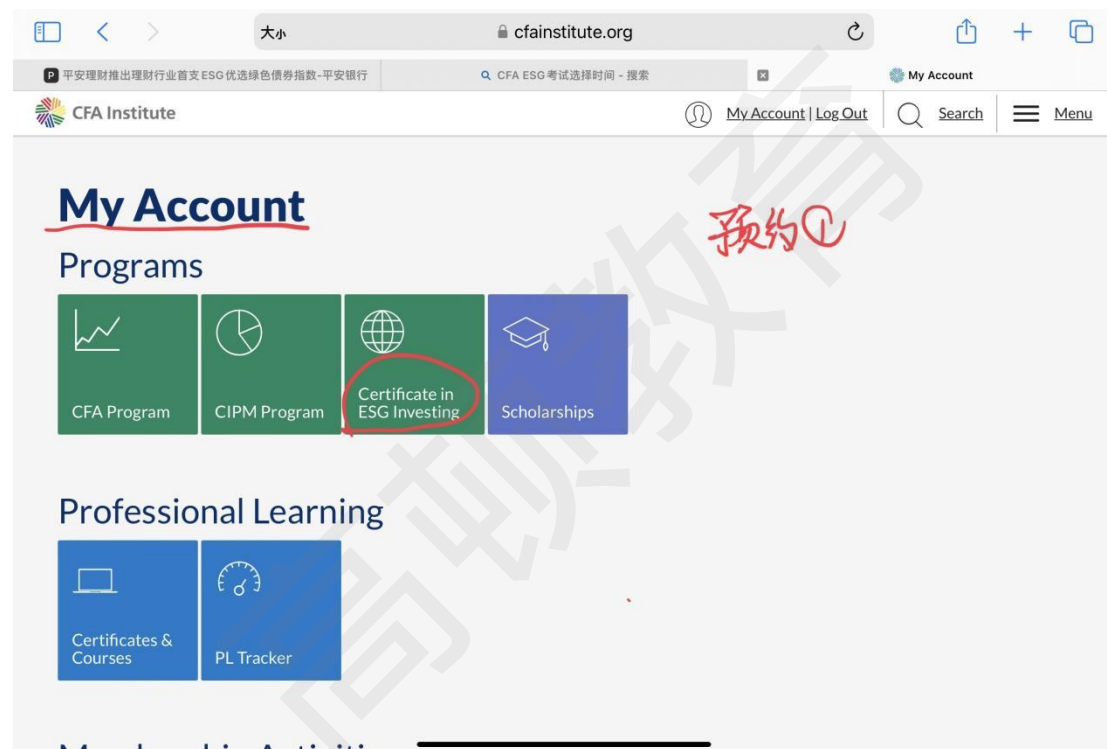
首先，这项流程适用于远程在线考试 Online Proctor Testing (OPT)，如果您选择了线下考试，请绕行。

一、预约流程：

* 具体路径、页面展示或有不同，大家找对入口就好

1. 登录 CFA Institute 官网 <https://www.cfainstitute.org/>

在 My Account 中找到 Certificate in ESG Investing 项目



2. 选择 OPT（在线监督考试），点 schedule(预约)。

* 如果已经预约想改期的，这里会出现 Reschedule OPT

20:19 6月10日周六 esgprogram.cfainstitute.org 93%

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Back to Enrollment

Which Option is Right for You: In-Person Site Testing or Online Proctored Testing

CFA Institute offers two different ways to take your exam: In-Person Site Testing (IST) at a testing center, or Online Proctor Testing (OPT), where you may take the test at home if you meet certain strict vendor requirements.

Want to learn more about these options?

[Online Proctored Testing \(OPT\)](#)

[In-Person Testing \(IST\)](#)

In-Person Site Testing (IST)
Reschedule to IST

Online Proctor Testing (OPT)
Your current appointment will be removed once a new appointment is scheduled.
Reschedule OPT → schedule.

3. 选择考试时间和时段，注意时区是北京时间，时段从早 1 点到晚 9 点都有

Beijing, Chongqing, Hong Kong, Urumqi

JUL 19 01:00
Wednesday, 19 JUL 2023

Beijing, Chongqing, Hong Kong, Urumqi

JUL 19 02:30
Wednesday, 19 JUL 2023

Beijing, Chongqing, Hong Kong, Urumqi

JUL 19 03:00
Wednesday, 19 JUL 2023

Beijing, Chongqing, Hong Kong, Urumqi

JUL 19 08:00
Wednesday, 19 JUL 2023

Beijing, Chongqing, Hong Kong, Urumqi

4. 选好时间后，会有一个考试说明要阅读，包括必要的安检措施、生物识别流程等，后面邮件也会有说明
可以使用的证件包括身份证、护照都可以。

19:54 6月10日周六 proscheduler.prometric.com English 95%

You have 13:38 minutes to complete your appointment.

Schedule Appointment

④ read. 生物识别说明

时段 预约 ③ 按日历选日期和

Personal Data provided to Prometric by the candidate (such as name and other identifying information), allowing Prometric to identify the candidate accurately during the testing process and over repeated testing sessions.

b. Remotely-Proctored Tests (Facial Recognition) 远程 面部识别

During the security check-in process in ProProctor a picture image is taken that employs measurements of the facial characteristics and assigns a template to the image. Over the course of the test the template is compared against the facial image of the candidate taking the test, and using the template will detect face present, no face present, multiple faces present, and/or wrong face present, allowing Prometric to identify the candidate accurately during the testing process.

2. Purposes and Uses for Biometric Data

Biometric data is solely used by Prometric to: (1) administer tests and verify a candidate's identity on an ongoing basis as they participate in present and future assessments; (2) pre-populate

② 选时间

Test Sponsor: CFA Institute

Program Name: ESG

Eligibility Information: [REDACTED]

Exam Name: Certificate in ESG Investing

Test Center Location: Remotely proctored

Test Date: 06 JUL 2023 ③

Test Time: 11:00 Beijing, Chongqing, Hong Kong, Urumqi (GMT +8.00)

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5. 看完说明点“我同意”

平安理财推出理财行业首支E... cfa institute官网 - 搜索 ProScheduler - Biometric... 高顿教育 高顿教育 English

You have 12:27 minutes to complete your appointment.

Schedule Appointment

预约 ⑤

The collection, transfer, processing, use and storage of your Biometric Data is necessary to register, schedule and administer a test to you. Please contact your test sponsor if you do not consent to the collection, transfer, processing, use and storage of your Biometric Data.

I acknowledge that by checking "I consent" below that I am expressly consenting to the collection and processing of my Biometric Data, as required by my test sponsor, and that such consent is effective until and unless I affirmatively withdraw that consent in writing to my test sponsor or via www.prometric.com/datasubjectrequests.

Do You Consent to the collection, processing, use and storage of your Biometric Data?

☒ I Consent 我同意

☐ I Do Not Consent

Test Sponsor: CFA Institute

Program Name: ESG

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6. 确认所填信息无误

注意考试预留了 3 小时的时段，就是约 9 点，预留 9-12 点（正式考试时间 2 小时 20 分钟，其他时间用于安检、设置）

*** 实际情况是，如果安检、设备调试不顺利，超过 40 分钟，没关系！不影响正式考试时间，仍然给足 2 小时 20 分钟。**

20:06 6月10日周六

proscheduler.prometric.com

95%

 You have 14:28 minutes to complete your appointment.

Appointment Verification

确认所填信息无误

预约 ⑥

① You must verify the information below and click 'Complete Appointment' to complete your transaction.

Personal Details

Name: [REDACTED]

Phone: [REDACTED]

Email: [REDACTED]

Appointment Details

JUL 06

Beijing, Chongqing, Hong Kong, Urumqi on Thu, 06 JUL 2023 (09:00 - 12:00)

Exam: Certificate in ESG Investing

Time 09:00 - 12:00

Date Thu, 06 JUL 2023

Total Duration: 3 hr. 0 min.

Payment Details

[REDACTED]

Price

Test Sponsor:
CFA Institute

Program Name:
ESG

Eligibility Information:
SQ2803729867
1234

Exam Name:
Certificate in ESG Investing

Test Center Location:
Remotely proctored

Test Date:
06 JUL 2023

Test Time:
09:00 Beijing, Chongqing, Hong Kong, Urumqi (GMT +8:00)

Contact Us


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7. 预约成功, 生成确认码 confirmation code, 类似准考证号。状态变成 Status:Scheduled.

20:10 6月10日周六 proscheduler.prometric.com 94%

 CFA Institute English

Appointment Summary

Appointment Confirmed 准考证号, 预约成功. ⑦

Confirmation Number: [REDACTED] 考试时要用!

☒ A confirmation email has been sent to bella_zy@qq.com (收到确认邮件)

Personal Details

Name: [REDACTED]
Phone: 436 86 17 18943275
Email: [REDACTED]

Appointment Details

JUL	Beijing, Chongqing, Hong Kong, Urumqi	on Thu, 06 JUL	Status: Scheduled
06	2023 (09:00 - 12:00)		
Exam: Certificate in ESG Investing Time 09:00 - 12:00 Date Thu, 06 JUL 2023			

Total Duration: 3 hr. 0 min.

Payment Details

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Test Sponsor: CFA Institute
Program Name: ESG
Eligibility Information: [REDACTED]
Exam Name: Certificate in ESG Investing
Test Center Location: Remotely proctored
Test Date: 06 JUL 2023
Test Time: 09:00 Beijing, Chongqing, Hong Kong, Urumqi (GMT +8.00)

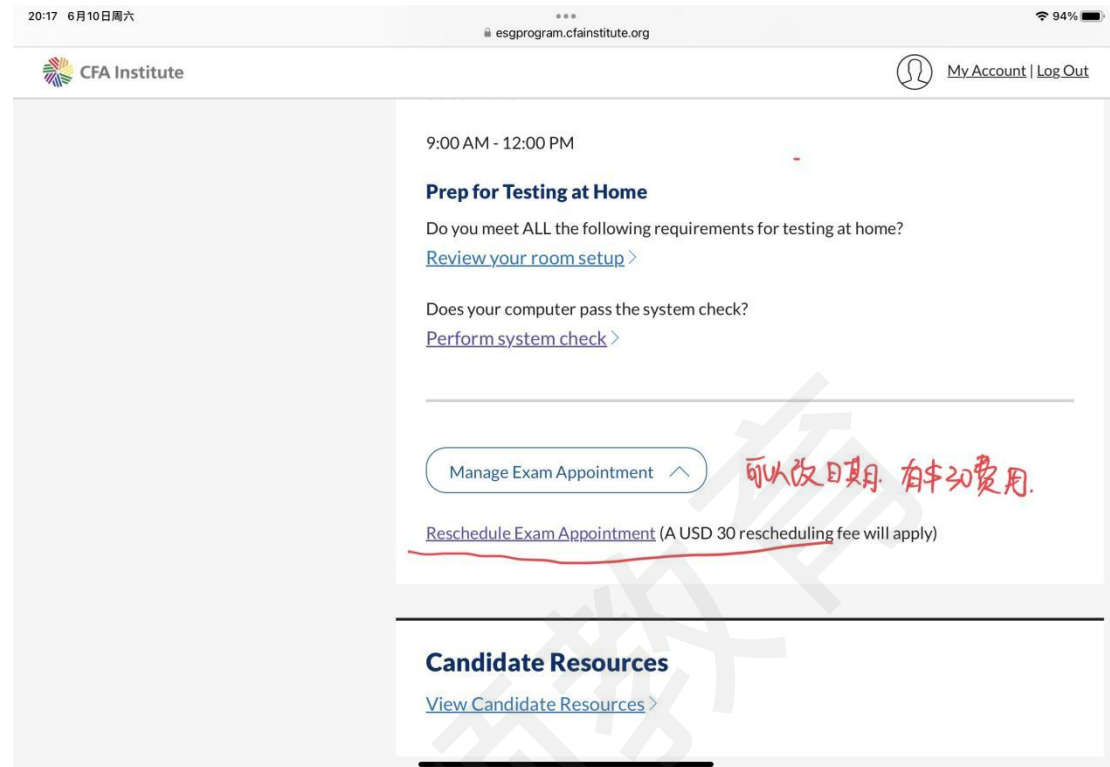
8. 同步收到确认邮件 Appointment Confirmation
收藏好准考证号 confirmation code, 阅读考前准备部分

WHAT'S NEXT? ... BE PREPARED FOR EXAM DAY

- [CLICK HERE](#) to review the ProProctor User Guide in preparation for your exam.
- [CLICK HERE](#) to watch our "What To Expect?" video and read our Candidate Frequently asked Questions.
- Carefully read the Remote Proctoring Regulations listed below and adjust your testing environment accordingly.
- PRIOR to your exam launch, [CLICK HERE](#) to install the ProProctor Application and perform a System Check.

二、关于改期和退费：

在 My Account 里面，Manage Exam Appointment 下面，选项 Reschedule Exam Appointment. 需要支付 30 美元费用



改期需要填注的信息包括：Confirm Appointment Details（新的日期时段）和支付方式(payment type, 比如信用卡)和账单地址(billing address), 按提示操作就好。

注意：（1）重新约考试需提前最少三天以上申请。（2）想取消考试退费的话，可在付款后 14 天内（至东部时间第 14 天晚上 11:59）全额退还注册费。

考前准备工作将在《ESG Investing 考试流程二：考前准备》篇里详细介绍。