

POLICIES & PROCEDURES

CERTIFIED IPC EXPERT (CSE)



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1. About IPC

Mission Statement

IPC is a global trade association dedicated to furthering the competitive excellence and financial success of its members in every sector of the electronics industry. In pursuit of these objectives, IPC devotes resources to management improvement and technology enhancement programs, the creation of relevant standards, protection of the environment, and pertinent government relations. IPC encourages the active participation of all its members in these activities and commits to full cooperation with all related organizations.

IPC Certification Programs

IPC Certification Programs are offered to promote professional development and recognize that an individual has demonstrated the level of competence specified in a given criterion. IPC Certifications are recognized globally as the international standard for credentialing in the electronics manufacturing industry.

2. About the Policies and Procedures

Effective Date

The effective date of a Policies and Procedures document is the official implementation date for the document. As of the effective date, the new guidelines outlined in the Policies and Procedures document immediately supersede any prior version and are applied to all applicants, candidates, certificants, and IPC Licensed Training Centers.

Any existing contracts, waivers, or other agreements referencing the Policies and Procedures document must comply with the latest revision as of the effective date of that document. The effective date of the Policies and Procedures document is indicated in the cover page of this document.

Governance and Revisions

As the sole governing authority for all IPC certification programs, IPC has the right and responsibility for maintaining, updating, and administering the IPC certification programs. Therefore, IPC reserves the right to make changes to the Policies and Procedures as necessary. This Policies and Procedures document is reviewed periodically and is subject to change without prior warning. All subsequent revisions to the Policies and Procedures document will be announced publicly by IPC and will be made available for complimentary download at least 30 calendar days prior to the effective date. It is the responsibility of the

Applicant, Candidate, and Certificant to remain aware of updates to the Policies and Procedures.

Questions

Questions regarding the policies and procedures document and its application shall be submitted to the IPC Help Desk at <https://ipcinc.atlassian.net/servicedesk/customer/portal/2>.

Interpretation of Policies and Procedures

All interpretations of these Policies and Procedures will be at IPC's sole discretion. Any individual may formally request an interpretation of the Policies and Procedures from the IPC Certification Program Office at <https://ipcinc.atlassian.net/servicedesk/customer/portal/2>.

The request shall identify the subject content within the document to be reviewed, the current understanding by the requestor and supporting information regarding the request. IPC will make every effort to respond to these requests with in 2-3 weeks, however depending on the nature of the request more time may be required. All formal interpretations of the policies and Procedures provided by IPC are final.

Non-Discrimination Statement

IPC actively integrates the principle of equal opportunity into its policies, procedures, and practices. The eligibility and certification requirements for all individuals seeking an IPC certification are applied equally regardless of age, race, religion, gender, national origin, veteran status, disability or any other basis prohibited by applicable law.

Impartiality Statement

IPC is committed to maintaining the impartiality of its certification programs and activities. IPC policies and procedures are designed to address potential conflicts of interests and ensure objectivity in its dealings with all parties involved in the IPC certification process, including IPC staff members, training centers, Certificants, Candidates, and Applicants. IPC Policies and Procedures are published publicly to ensure that all parties involved in the IPC certification process have equal access to accurate information concerning IPC certification programs.

Code of Impartiality

IPC staff and volunteers will avoid all professional conflicts of interests and make any potential conflict of interest known to their immediate supervisor. IPC staff and volunteers will avoid any activity, relationship, or circumstance that may compromise their impartiality including, but not limited to, granting preferential treatment to any person involved in the IPC certification process or using their position for financial, professional, or personal gain.

Accessibility of Certifications

Participation in any IPC Certification program is voluntary and open to any individual that meets the program's qualification requirements. IPC membership is not required to participate in any IPC Certification Education program. However, IPC member companies may enjoy discounts not offered to non-members.

Scope of Certification

IPC Certification programs are developed by and through consensus of the electronics industry, including, but not limited to, members of IPC and representatives from academia, government agencies, original equipment manufacturers (OEM), electronic manufacturing service companies (EMS) and circuit board manufacturing companies.

CSE Certificants demonstrate, through the certification process, that they possess a minimum level of knowledge (as determined by IPC) with regard to their ability to read, navigate, interpret, and apply the respected standards to which they are certified. Certificants are certified in two-year cycles after satisfying specific prerequisites outlined in this document, including the completion of one or more written examinations on specific IPC standards. These certification assessments are based on a body of knowledge that encompasses various best practices, requirements, and guidelines specified within the respective IPC Standard.

All IPC Certification assessments are developed with the input of subject matter experts from across the electronics manufacturing industry (including a variety of industry verticals such as aerospace, defense, automobile, medical, and consumer electronics), to ensure that exam accuracy reflects the needs of those verticals.

3. Terms and Definitions

Active Certification

A Certification is considered active between the dates that a certificant earns the certification and the expiration date, as listed on their certificate.

Appeal

A formal request by any individual or organization for IPC to reconsider a decision it has made regarding the certification process or an IPC certified person.

Applicant

An individual that has applied for an IPC certification program but has not yet been granted approval to participate in the program or attempt any certification examinations.

Candidate

An individual that has applied and been approved to sit for an IPC certification exam but has yet to complete the certification requirements outlined in the IPC Policies and Procedures document and therefore is not yet certified by IPC.

Certificant

An individual that has met all the requirements for certification outlined in the IPC Policies and Procedures document, and currently holds an active IPC certification in good standing.

Certification

The process by which an organization verifies and provides written assurance that an individual has demonstrated the level of competence specified in a given standard or set of criteria.

Certification Advisory Committee (CAC)

The Certification Advisory Committee (CAC) is a group of industry subject matter experts responsible for advising IPC on credentialing programs and oversight of the certification subcommittees.

Certification in Good Standing

A Certification in Good Standing is active and without sanction.

Certification Program Office (CPO)

The Certification Program Office (CPO) oversees the development and operations of IPC certification programs and liaisons with the various volunteer industry committees supporting these programs. The Certification Program Office is managed through the IPC Global Headquarters and is overseen by the IPC Director of Certification Programs and the IPC Director of Education Operations.

Certified IPC Specialist (CIS)

A certificant holding an active Certified IPC Specialist certification.

Certified IPC Trainer (CIT)

A certificant holding an active Certified IPC Trainer certification.

Certified Standards Expert (CSE)

A certificant holding an active Certified Standards Expert certification.

Competence

The demonstrated ability to apply the knowledge and skills required to successfully undertake roles or perform tasks as defined in a given standard or set of criteria.

Endorsements

An area of specialization in which a certificant has demonstrated proficiency. Endorsements are added to an existing certification.

Enhanced Policies and Procedures Exam

Assessment that measures the comprehension of the content found in the IPC Certification Policies and Procedures document.

Grievance

An expression of dissatisfaction by any individual or organization regarding the activities of IPC, or IPC applicants, candidates, or certificants.

IPC EDGE Learning Management System (LMS)

The IPC Education and Certification portal, through which online training is delivered, certification testing is administered, certificates are issued, and records are stored.

IPC Education Executive Advisory Committee (EEAC)

The IPC Education Executive Advisory Committee oversees and supports the Certification Advisory Committee, Training Program Advisory Committee, and Job Task Analysis Committee.

IPC Licensed Training Center

Any training center licensed by IPC pursuant to the IPC Certification Center Master License Agreement or the IPC Private Certification Center Master License Agreement. There are two types of Licensed Training Centers: Private Training Centers and Public Training Centers.

Job Task Analysis

The formal process of identifying the duties required to perform a job, describing the tasks required to perform those duties, and defining the knowledge, skills, and abilities required to successfully perform those tasks.

Job Task Analysis Committee (JTAC)

The IPC Job Task Analysis Committee (JTAC) is a group of industry subject matter experts responsible for defining a competency model (collection of competencies that jointly define successful job performance) for the electronics industry.

Master IPC Trainer (MIT)

A designation that may be assigned to certificants holding a Certified IPC Trainer Certification if they meet the relevant criteria outlined in the Policies and Procedures.

Policies and Procedures (P&P)

The codified rules and guidelines governing an IPC certification program. This document is periodically reviewed and updated.

Private Training Center

A Licensed Training Center which employs or contracts MITs to conduct training courses within a company or corporation.

Proctor

An individual authorized by IPC to conduct certification testing on its behalf.

Public Training Center

A Licensed Training Center which employs or contracts MITs to conduct publicly available training courses.

Recertification

The process by which a certificant renews their certification prior to its expiration.

Revocation of Certification

The official cancelation of a certification by IPC. Upon revocation of a certification, an individual is no longer considered certified by IPC, losing all rights and privileges. The individual shall no longer claim to be certified by IPC.

Shall

In this document, the word “shall” denotes a requirement.

Should

In this document, the word “should” denotes a strong recommendation that is not required.

Standard Specific Exam

Assessment that measures the comprehension of the content found in a specific IPC standard.

Suspension

A certification suspended by IPC is considered invalid from the date of suspension, until the date in which the suspension is lifted. A suspended certification is not considered in good standing or active.

Training Program Advisory Committee (TPAC)

The Training Program Advisory Committee (TPAC) is a group of industry subject matter experts responsible for advising IPC on training programs and providing oversight over the training subcommittee work.

4. Related Documents

IPC-A-610 – Acceptability of Electronic Assemblies

IPC-6012 – Qualification and Performance Specification for Rigid Printed Boards

IPC J-STD-001 – Requirements for Soldered Electrical and Electronic Assemblies

IPC-A-600 – Acceptability of Printed Boards

IPC/WHMA-A-620 – Requirements and Acceptance for Cable and Wire Harness Assemblies

IPC-7711/7721 – Rework, Modification, and Repair of Electronic Assemblies

5. Roles and Responsibilities

IPC

The IPC Certification Program Office consists of employees of IPC, including but not limited to, the members of the IPC Certification Department. The IPC Certification Program Office shall:

- a. Oversee the operation of the CSE Program in accordance with this document.
- b. Establish, implement, and maintain the policies and procedures that govern certification decisions, including the granting, maintaining, recertifying, altering of scope, suspension, and withdrawing of a certification.
- c. Schedule, facilitate, and provide support for the IPC Certification Committee and Subcommittees.
- d. Approve and provide administrative oversight of IPC Licensed Training Center licenses and Program riders.
- e. Maintain certification records and validate the authenticity and accuracy of IPC certifications.
- f. Maintain ultimate responsibility for the CSE Program.
- g. Periodically audit Licensed Training Centers, MITs, and CITs to ensure compliance with IPC Policies and Procedures.
- h. Interpret IPC policies and resolve issues relating to the IPC Certification System.

IPC Volunteer Committees

Organization of Committees

The IPC Education Executive Advisory Committee oversees and supports the Certification Advisory Committee, Training Program Advisory Committee, and Job Task Analysis Committee. The Certification Advisory Committee and Training Advisory Committee oversee and support Certification and Training subcommittees. There is a Certification Subcommittee and a Training Subcommittee for each IPC program. The Job Task Analysis committee oversees and supports one subcommittee for each electronics industry job role.

Certification Advisory Committee (CAC)

The CAC is composed of the chair and vice-chair of each Certification Advisory Subcommittee. The IPC liaison to the Certification Advisory Committee is the Director of IPC Certification Programs or a representative thereof. The committee's scope and responsibilities are:

- a. Advise and support IPC on the development, maintenance, and implementation of certification policies and procedures.
- b. Review proposals for new certification programs and advise IPC on their scope, feasibility, development, and implementation.
- c. Advise and support IPC to ensure that IPC certification programs meet national and international standards and comply with relevant accreditation requirements.

Certification Advisory Subcommittees (CAS-XXX)

Each CAS is chaired and composed of representatives from the companies, training centers, and other institutions that use, deliver, or rely on IPC Certification Programs. The IPC liaison to each Certification Advisory Subcommittee is the Director of IPC Certification Programs or a representative thereof. Each subcommittee's scope and responsibilities are:

- a. Employ the most recent Job Task Analysis to develop the exam blueprint (subject areas to be covered on the certification exam).
- b. Evaluate certification exam questions submitted by SMEs for technical accuracy.
- c. Collaborate with the IPC psychometrician to ensure that each certification exam question meets IPC Item Writing Guidelines
- d. Develop and maintain program specific policies and procedures when applicable.

Training Program Advisory Committee (TPAC)

The TPAC is composed of the chair and vice-chair of each Training Program Advisory Subcommittee. The IPC liaison to the Training Program Advisory Committee is the Director of IPC Education Programs or a representative thereof. The committee's scope and responsibilities are:

- a. Advise and support IPC in the development, maintenance, and implementation of IPC training programs.
- b. Review proposals for new training programs and advise IPC on their scope, feasibility, development, and implementation.
- c. Advise and support IPC to ensure that IPC training programs meet national and international standards and comply with relevant accreditation requirements.

Training Program Advisory Subcommittees (TPAS-XXX)

Each IPC credential program is supported by a corresponding Training Program Advisory Subcommittee (TPAS-XXX). Each TPAS subcommittee is chaired and composed of representatives from the companies, training centers, and other institutions that use, deliver, or rely on IPC Certification Programs. The IPC liaison to each Training Program Advisory

Subcommittee is the IPC Director of Education or a designated representative thereof. The committee's scope and responsibilities are:

- a. Employ the most recent Job Task Analysis to develop training program learning objectives and assessment questions.
- b. Evaluate training program assessment questions submitted by SMEs for technical accuracy.
- c. Collaborate with the IPC psychometrician to ensure that each training program assessment question meets IPC Item Writing Guidelines.
- d. Develop and maintain program specific policies and procedures when applicable.

Job Task Analysis Committee (JTAC)

The IPC Job Task Analysis Committee (JTAC) is a group of industry subject matter experts responsible for defining a competency model (collection of competencies that jointly define successful job performance) for the electronics industry. The IPC liaison to the JTA Committee is the Senior Director of Learning and Professional Development or a designated representative thereof. The committee's scope and responsibilities are:

- a. Identify and define key roles (job, position, or task) in the electronics industry and perform an industry driven job task analysis for each role.

Job Task Analysis Subcommittees (JTAS)

The committee's scope and responsibilities are:

- a. Define and periodically review the knowledge, skills, and abilities required to successfully perform each industry job, position, or task.

Certificants

Certified Standards Expert (CSE)

The Certified Standards Expert (CSE) is a subject matter professional with a high level of knowledge and understanding of a specific IPC standard or group of standards. The role of the Standards Expert may vary by organization, but the CSE may:

- Act as a subject matter expert for their organization, answering standard related questions, providing support to various levels of the organization, and, interpreting the standard for their organization.
- Judge organizational conflicts in opinion of a viewed condition.
- Act as the intermediary between the organization and IPC staff and/or industry experts on standards questions.
- Update the organization on the latest standards and best practices from industry.
- Provide feedback to standards committees on updates to the process for inclusion in the standards.
- Interface with designers and process engineers to develop assembly processes.

Senior Certified Standards Expert (SCSE)

The Senior Certified Standards Expert (SCSE) is a subject matter professional with a high level of knowledge and understanding of a variety of IPC standard or group of standards. The role of the Standards Expert may vary by organization, but the CSE may:

- Act as a subject matter expert for their organization, answering standard related questions, providing support to various levels of the organization, and, interpreting the standard for their organization.
- Judge organizational conflicts in opinion of a viewed condition.
- Act as the intermediary between the organization and IPC staff and/or industry experts on standards questions.
- Update the organization on the latest standards and best practices from industry.
- Provide feedback to standards committees on updates to the process for inclusion in the standards.
- Interface with designers and process engineers to develop assembly processes.

6. Prerequisites and Fees

Eligibility for the Certified Standards Expert Examination

The applicant shall agree to abide by the IPC Certified Standards Expert Program code of ethics.

When applying to sit for an IPC certification exam, the applicant shall submit all personal information requested, including, but not limited to, any education and experience requirements established by the program's eligibility requirements.

Application and Testing Fee Schedule

CSE Computer-Based Exams

The registration costs for a CSE computer-based exam are:

IPC Members - \$155

IPC Non-Members - \$190

CSE Computer-Based Exams (Remote Proctoring)

The registration costs for a CSE computer-based exam using remote proctoring are:

IPC Members - \$180

IPC Non-Members - \$215

CSE Computer-Based Retest Fees

The registration costs for a CSE retest using a computer-based exam are:

IPC Members -\$80

IPC Non-Members -\$105

CSE Computer-Based Retest Fees (Remote Proctoring)

The registration costs for a CSE retest using a computer-based exam with remote proctoring are: IPC Members -\$135

IPC Non-Members -\$160

CSE Additional Endorsement Exam Fees

The registration costs for a CSE to add a new endorsement using a computer-based exam are:

IPC Members -\$140

IPC Non-Members -\$160

CSE Additional Endorsement Exam Fees (Remote Proctoring)

The registration costs for a CSE to add a new endorsement using a computer-based exam with remote proctoring are:

IPC Members -\$155

IPC Non-Members -\$190

SCSE Application Fee

The application costs for an initial SCSE are:

IPC Members -\$140

IPC Non-Members -\$170

Certification Renewal Testing and Application Fee Schedule

CSE Computer-Based Renewal Exams

The registration costs for a CSE computer-based renewal exam are:

IPC Members - \$155

IPC Non-Members - \$190

CSE Computer-Based Renewal Exams (Remote Proctoring)

The registration costs for a CSE computer-based renewal exam with remote proctoring are: IPC Members - \$180

IPC Non-Members - \$215

SCSE Renewal Application Fee

The renewal application costs for the SCSE are:

IPC Members - \$110

IPC Non-Members - \$135

CSE & SCSE Renewal Fee

IPC Members - \$155– per endorsement

IPC Non-Members - \$190- per endorsement

Criteria for Initial Certification

Certified Standards Expert (CSE)

To qualify for Certified Standards Expert certification, a candidate shall fulfill the following requirements:

Personal Identifying Information

IPC requires that all candidates complete a Certification Profile, that includes, but is not limited to, their legal name, home address, and date of birth. This information is utilized by IPC to confirm the identity of Candidates and Certificants. IPC does not sell or share e-mail addresses with other organizations without the express permission of the user. IPC does not sell contact information from the database. Please see the IPC Privacy Policy for additional information: <https://www.ipc.org/privacy-policy>

Candidates shall complete their Certification Profile on the IPC EDGE Learning Management System, regardless of assessment method.

Candidates can access their Certification Profile from their IPC EDGE user dashboard or from any certification program hosted on the IPC EDGE Learning Management System.

Please ensure that all personal profile information provided is accurate prior to submission to IPC. IPC is responsible, as an International Certifying Body with the proper identification of all certificants. These policies and procedures are established to ensure accuracy and eliminate potential fraud. Providing fraudulent profile information is a violation of the IPC Certification Policies and Procedures and Code of Ethics and may be remedied through the revocation of certification status and restrictions of future certifications.

Certificant's Name

The security and integrity of IPC Certification programs is contingent upon IPC's ability to properly and accurately identify certificants. Therefore, a certificant shall only list their legal name on their IPC profile to ensure that this is reflected on their certification.

Certificants seeking to change their name with IPC shall submit such requests in writing, and provide legal documentations supporting the name change, including a detailed explanation explaining why the name change is necessary. Documentation submitted through trainers will not be accepted. The requested name change shall match the

supporting documentation. If an individual legally changed their name, they shall provide a copy of legal documentation related to the name change, such as a marriage certificate or a court order.

Certification Exam(s)

A candidate shall successfully complete the Enhanced Policies and Procedures Exam with a minimum score of 80%.

A candidate shall successfully complete the General Knowledge Exam with a minimum score of 80%.

A candidate shall successfully complete the required Standard Specific Exam(s) with a minimum score of 80%.

Senior Certified Standards Expert (SCSE)

The Senior Certified Standards Expert (SCSE) certification supersedes and replaces a certificant's Certified Standards Expert (CSE) certification. A certificant may not hold both a Certified Standards Expert (CSE) certification and a Senior Certified Standards Expert (SCSE) certification simultaneously.

To qualify for Certified Standards Expert certification, a candidate shall fulfill the following requirements:

Certification and Endorsements

To obtain a Senior Certified Standards Expert (SCSE) certification, a candidate must hold an active Certified Standards Expert (CSE) certification in good standing, with endorsements in at least three different IPC standards. For example, a CSE with endorsements in J-STD-001, 610, and 620 may apply to become a Senior Certified Standards Expert (SCSE).

Experience and Employment

The Senior Certified Standards Expert (SCSE) shall only be granted if the CSE possesses 10 years of experience in the electronics industry in a role that utilizes IPC standards regularly.

Application

To obtain a Senior Certified Standards Expert designation, the Certified Standards Expert (CSE) shall submit a completed Senior Certified Standards Expert Application, supporting documentation, and all applicable fees to IPC.

Supporting Documentation

In addition to a Senior Certified Standards Expert application, a candidate will submit the following:

- A resume detailing 10 years of experience in the electronics industry in a role that utilizes IPC standards regularly.

- A letter from current employer on letterhead identifying their current role, length of time in the role, and how their role utilizes IPC standards. If self-employed, a candidate may submit a personal statement on their company's letterhead providing a description of the current role, the type of work done by their company, and how they utilize IPC standards.

7. Certification Exam Overview

Exam Descriptions

Enhanced Policies and Procedures Exam

The Enhanced Policies and Procedures Exam contains multiple-choice questions that evaluate a candidate's understanding of:

- a) The Policies and Procedures for the certification program that the candidate is attempting to complete.
- b) The history of the electronics industry and how standards help improve the industry.
- c) The key steps in the production of a circuit board and electronics assembly.
- d) How standards are developed, revised, and documented, and how you can help improve those standards.
- e) How to apply standards certification to increase the quality for your company, your customers, and the electronics industry.
- f) How to get assistance in solving your technical challenges.

General Knowledge Exam

The General Knowledge Exam is a closed-book test with multiple-choice questions.

Candidates must complete the exam within 1-hour and attain a minimum score of 80% to pass.

This exam assesses an individual's knowledge of the following areas:

- Component Identification
- General Terms and Definitions
- Order of Precedence
- Document Handling
- Classification
- Measurements, Units, and Applications
- Definition of Requirements
- Appendixes
- Requirements Flowdown
- Health and Safety
- Personnel Proficiency
- Acceptance Requirements
- Assembly Requirements

Standard Specific Endorsement Exam

A CSE may choose to test to any of the following standard-specific endorsement exams. The required exams for each endorsement are listed below:

J-STD-001 Endorsement

Open book exam
2 Hours and 30 Minutes Time Limit

IPC-A-600 Endorsement

Open book exam
2 Hours and 30 Minutes Time Limit

IPC-A-610 Endorsement

Open book exam
2 Hours and 30 Minutes Time Limit

IPC-6012 Endorsement

Open book exam
2 Hours and 30 Minutes Time Limit

IPC/WHMA-A-620 Endorsement

Open book exam
2 Hours and 30 Minutes Time Limit

IPC-7711/7721 Endorsement

Open book exam
2 Hours and 30 Minutes Time Limit

8. Assessment Methods and Policies

IPC Certification exams generally offered in three modalities: Online Proctored Exams, Remote Proctored Exams, and Paper & Pencil Proctored Exams. In order to ensure the integrity of the examination process, candidates may not change modalities after beginning the assessment process for an IPC Certification. All exams associated with that certification shall be completed using the same modality.

Online Exams

IPC Certification Exams are offered as proctored online exams through the IPC EDGE Learning Management System. The Online Exam format is to be used as the default mechanism for all certification exams.

Minimum system requirements: IPC's EDGE platform has been tested on a variety of operating systems, while many are compatible, IPC recommends having hardware and software conducive to online examinations.

To ensure better quality, IPC recommends using at least a 15" monitor and a computer running the latest operating system. IPC also recommends utilizing one of the latest version of the following browsers:

Chrome
Firefox

Running additional programs even in the background during testing may directly affect the performance of the exam administration and is prohibited. Any attempt to screen capture or record a candidate's screen during the certification assessment process is considered a violation of these policies and procedures and may potentially result in the suspension of the candidate's and proctor's certifications, as well as other legal penalties.

Remote Proctoring Exams

Select IPC Certification exams are also offered in a remote proctored format. Candidates complete these online assessments through the IPC EDGE Learning Management System and are monitored by a combination of Artificial Intelligence, live proctors, and video/audio recording and analysis to monitor candidates as they sit for the certification exams. Unlike the Online Exams modality, Remote Proctoring Exams do not require a proctor physically present while testing.

Candidates choosing to sit for their examination via this method will have to pay an additional fee.

Candidates shall adhere to the system requirements listed under remote proctoring. The Remote Proctoring system requirements below are in addition to those required for IPC EDGE:

- Windows: 10, 8, or 7 - Mac: OS X 10.10 or higher
- Web camera (internal or external) & microphone
- A broadband internet connection
- If using a company issued device, you may need to work with your IT department to download the required software. Please note you must have administrator rights that allow you to download software to the computer on which you wish to take the certification exam.

These requirements may change as technology improves and evolves. Please reference the Remote Proctoring Guide on IPC EDGE for the latest system requirements.

If using a company issued device, you may need to work with your IT department to download the required software. Please note you must have administrator rights that allow you to download software to the computer on which you wish to take the certification exam.

Remote proctoring is not available for workmanship assessments at this time.

Certification Exam Proctoring

Exam Proctor

The certification exam proctor shall:

- a) Ensure the area where the candidate takes the exam is quiet and free from distractions on the arranged day and time of the exam (e.g., the area will not also be in use by others whose activities might disrupt the candidate).
- b) Read the exam instructions included in the exam packet to all candidates before beginning the exam.
- c) Verify the candidate's identification by requesting to see a photo identification. Acceptable forms of photo identification include:
 - a. Valid government issued driver's license
 - b. Valid government identification
 - c. Military identification
 - d. Valid passport
 - e. Other government issued photo identification
- d) Maintain secure and proper test administration procedures, including relocation of candidates.
- e) Ensure that candidates are seated for maximum separation (depending on available space). If necessary, the proctor will move desks prior to the beginning of the exam to achieve maximum separation.
- f) Ensure that candidates are spaced in a manner that prevents them from seeing the computer screen or papers of another candidate.
- g) Ensure that candidates place all personal items that are not pre-approved by the Policies and Procedures for use during the exam in a secure location until the end of the exam period.
- h) Ensure that there is no speaking amongst candidates during the exam process.
- i) Ensure that no testing materials are taken out of the examination room.
- j) Never leave the candidates unsupervised during the certification exam. The proctor may assign a temporary relief person in the case of an emergency. This individual is responsible for enforcing the proctoring rules in the absence of the proctor.
- k) Ensure that exams are completed in a single block of time. The proctor may allow short breaks of less than 20 minutes in duration if they do not compromise the integrity of the examination.
- l) Ensure that each certification exam is administered in the time specified by the standard or set of criteria that governs that certification program.
- m) Ensure that exams are scheduled in a time frame that allows candidates ample time to

complete the assessment.

- n) Ensure that candidates may not continue exams beyond the cut off time, unless an accommodation based on the candidate's special needs have been approved by IPC in writing.
- o) Terminate any exam if the proctoring or testing procedures are compromised by a Candidate's improper conduct. The proctor shall notify IPC immediately when a certification exam is terminated.
- p) Ensure that guests are not allowed in the examination room during testing.
- q) Ensure that the certification exams are only scheduled during a period of time when the candidates can be actively monitored by a proctor.
- r) Only commence the exam once all student verifications and room set up is completed.

Certification Candidate

Certification candidates shall:

- a) Review the proctoring rules for certification exams as outlined in this document.
- b) Establish their identity prior to the beginning of the certification exam by providing their proctor a government issued identification with a name that matches the name used during the registration process.
- c) Ensure that all electronic devices not used to deliver the online exams are shut off (not just silenced or put to sleep) and secured outside of the reach of candidates along with all other personal items that are not pre-approved by the Policies and Procedures for use during the exam.
- d) Not use their cell phones during the exam. If a calculator is required for the exam, the candidate may not use their cell phone as a calculator.
- e) Not communicate with any other candidate, in any manner, for any reason, during the exam.
- f) Submit their exam booklet and answer sheet directly to their proctor upon completion of their exam.
- g) Complete the Certification assessment in one continuous administration.

Testing Accommodations

IPC has based its accommodations process in accordance with the Americans with Disabilities Act (ADA) and IPC will ensure that no individual is deprived of the opportunity to take the certification examination solely by reason of a disability as defined by the ADA. Reasonable accommodations for testing shall be provided at no additional cost to candidates with diagnosed and documented special medical needs.

In order to request special accommodations for a certification exam, a candidate must submit a Certification Exam Accommodations Form six weeks prior to the date of the exam.

In order to request special accommodations for a certification exam, a candidate must submit a Certification Exam Accommodations Form six weeks prior to the date of the exam.

Along with the form the candidate must submit the following records:

For individuals with a learning disability:

In addition to the Certification Exam Accommodations Form, please submit relevant diagnostic test results detailing the specifics of the learning disability as they relate to the requested accommodation.

For individuals with a medical issue:

Certification Exam Accommodations Form, please have the appropriate medical professional submit a letter detailing the nature of the medical disability and the reasons for requesting the accommodations.

Documentation submitted with the Certification Exam Accommodations Form must be written on the professional's letterhead and must have an original signature. The date of this letter may not exceed 5 years prior to the date of the request.

No applicant shall be offered an accommodation that would compromise the candidate's ability to test accurately the skills and knowledge it purports to measure. Also, **no additional aid or service will be provided that would fundamentally alter the examination or security of IPC's content.**

What should candidates bring to their exam?

Candidates shall bring the following with them to their certification exam:

- a) Any materials (such as calculators, tools, etc.) specified in the certification program's Policies and Procedures as permissible for use during the exam.
- b) A government issued identification. Examples of acceptable photo IDs include:
 - a. Valid government issued driver's license
 - b. Valid government identification
 - c. Military identification
 - d. Valid passport
 - e. Other government issued photo identification

Each candidate shall have access to either an electronic or printed standard for use during a standards-based certification exam. Candidates may be provided access to electronic or printed standard by their proctor provided that such standards are free of any writing, highlighting, or other marks. Only original, legally purchased copies of standards shall be used for certification testing. Candidates may not share documents or standards during the certification exam. Candidates may not write in their standard during the certification assessment process.

Exam Language

IPC certification exams are initially developed in the English language. Foreign language translations of certification exams may become available on a case by case basis.

Exam Results and Certificates

Exam Results

All IPC exams are pass/fail assessments designed to measure a minimum level of competence. The time frame and method of obtaining exam results will vary based on the type of assessment utilized.

Online Exams

The results of any exam taken on the IPC EDGE Learning Management System are available as soon as the candidate submits the exam, or the exam time expires.

Certificate Issuance

Candidates that successfully complete the requirements of an IPC certification program will receive a certificate verifying completion of that program. IPC certificates are issued directly to the candidate via their IPC EDGE Learning Management System account. **The process of downloading of the candidate's certification from EDGE is the final step in the certification process.** The effective date of the certification is based on the date of successful completion of the mandatory module; however, **Certifications are not considered valid until it has been downloaded at least once.**

Certifications are only available for download from IPC EDGE for a period of 180 days after completion of the program. Only a candidate may download their certification. Instructors and proctors are not granted access to candidate certificates on the IPC EDGE Learning Management System; but may be granted access to completion information on the portal.

Instructors, proctors, and any other third party may request and obtain copies of certificates directly from the certificant. IPC will only verify the authenticity of certificates and provide summary reports for instructor record keeping. IPC does not provide copies of certificates to any individual other than the certificant.

Certification Endorsements

Certification endorsements in the CSE and SCSE program are revision specific. The CSE and SCSE certificate will list the program and revision to which the certificant is endorsed.

Certificate Information & Ownership

A candidate's certificate will bear the candidate's name, certification number, certification expiration date, optional modules or endorsements completed, the name of the candidate's instructor, and the instructor's employer.

Candidates may print copies of their certificate for personal and professional use, in compliance with this document.

All certificates are issued to the candidate; however they remain the property of IPC, which may withdraw, cancel, revoke, change the scope of, or otherwise annul the certification for cause.

Failure

Candidates that fail to pass a certification exam may attempt to retake the exam after the cool down period specified in the certification program's Policies and Procedures. Candidates are afforded one complimentary retest of the Enhanced Policies and Procedures Exam. Any additional attempts are subject to the retest fee. Candidates that fail the General Knowledge or Standard Specific Endorsement exam are subject to a retest fee.

Cool Down Period

The certification exam cool down period is used to protect the integrity of certification exam items and to ensure that candidates are afforded the opportunity to obtain additional training as necessary.

First Failure

In the event that a candidate fails his or her first attempt to pass a certification exam, the candidate shall wait a minimum of 14 calendar day before attempting a retest.

Second Failure

In the event that a candidate fails his or her second attempt to pass a certification exam, the candidate shall wait a minimum of 30 calendar days before attempting a retest.

Third Failure

In the event that a candidate fails his or her third attempt to pass a certification exam, the candidate shall wait a minimum of 365 calendar days before attempting a retest.

Candidates may opt to retest only the failed portion(s) of the certification written examination or the workmanship project, if completed within 90 calendar days following the initial failed exam.

Certification Exam Security

All certification exam materials are confidential, proprietary, and the exclusive property of IPC. IPC exam materials are made available to candidates for the sole purpose of assessing competency. All candidates are expressly forbidden from recording, copying, disclosing, publishing, reproducing, or transmitting the examination, in whole or in part, in any form or by any means, verbal or written, for any purpose, without the prior written consent of the IPC

Certification Office. Non-compliance with this policy may lead to suspension or revocation of a certificant's certification, along with possible legal action.

Cheating and Irregularities

Cheating, inappropriate exam administration, environmental disruptions that affect testing, or any other irregularity shall be immediately reported to the IPC Certification Office. All such incidents shall be investigated and acted upon in accordance with the latest version of the IPC Policies and Procedures. IPC reserves the right to take any action deemed appropriate, including revocation of certification and legal action.

Individuals who engage in any of the following misconduct or exhibit any of the following behaviors during their examination may be subject to one or more of the actions listed in the subsection below.

- Attempting to take the examination for someone else or taking the examination for someone else.
- Attempting to have someone else take the examination for you or having someone else take the examination for you.
- Attempting to aid an individual or receive aid to complete the examination.
- Bringing any materials, devices, or items to the examination appointment session that may compromise the security or validity of the administration.
- Falsification of the certification application.

If IPC obtains information that an individual engaged in any misconduct, as defined in the Policies and Procedures, IPC, in its sole discretion, may take one or more actions, including but not limited to:

- Placing a hold on the individual's ability to schedule an examination appointment.
- Placing a hold on the individual's ability to register for an examination.
- Suspension of the test administration.
- Forfeiture of all testing fees.
- Termination of the test administration.
- Withholding the reporting of the examination score or invalidation or cancellation of an examination score.
- Disqualification from IPC's Certification Programs or revocation of IPC credentials.

9. Certification Term

The certification term for the CSE program is 2 years. The certification term begins on the date a candidate successfully completes all the program's minimum certification requirements.

Certifications only reflect the expiration month and year. Certifications expire the last day of the expiration month, regardless of the day of the month the certification was granted.

CSE standard endorsements expire on the same date as the initial certification, regardless of when the endorsement was earned.

Certification Renewal Period

The IPC recertification program helps to ensure the continued competence of certificants as tools, processes, and technologies evolve. Prior to the conclusion of the certification term, certificants shall demonstrate they have successfully met the requirements of one of the renewal methods listed in this section.

CSE certification renewals shall occur within six calendar months prior to the expiration of an existing certification. When Certificants renew their certification within 6 months of the certification expiration date, the renewed certification will be valid for an additional 2 years from the expiration date of their currently held certification.

Certification Renewal Requirements and Process

General Policy

CSEs and SCSEs that recertify, prior to their certification expiration date, automatically extend the expiration date of all endorsements. Since endorsements are attached to a certification, all endorsements to a certification expire on the same date as the initial certification regardless of when the endorsement was added to the CSE certificate. When a certification is extended through the recertification process, then all endorsements are also extended.

Renewal through Renewal Testing

Certified Standards Expert (CSE)

A CSE or CSES may renew his or her certification through retesting. In order to renew their certification, a CSE must successfully complete the CSE certification renewal exam prior to their certification expiration date.

General Renewal through Retesting Policies

To renew their certification through testing only, Certificants shall follow all of the certification program's application procedures and schedule the certification renewal exam with an active IPC MIT.

All retests follow the same policies and procedures as initial certification testing, including the cool down period after failures.

Certificants are responsible for all recertification testing fees.

Committee Participation

CSEs and SCSEs that have participated in IPC standards committees may opt to complete the CSE Recertification Application, pay the recertification fee, and provide a letter from the committee's staff liaison attesting to their participation in lieu of testing.

The CSE or SCSE must provide documentation attesting to at least 25 hours of committee participation to utilize this recertification method. All 25 hours of committee participation must occur during the most recent certification period.

A CSE or SCSE may only utilize this recertification method if they participate in a technical committee which corresponds with an endorsement they have earned.

Senior Certified Standards Expert Renewal Policy

Senior CSEs may recertify utilizing the same criteria as the CSE, but with the following additional requirements:

- If a Senior CSE is recertifying through either the testing or committee participation methods, they must also submit the a Senior CSE Recertification application form.
- The Senior CSE Recertification application must be accompanied by an updated resume and a letter from their current employer on company letterhead indicating their current role and their continued use of IPC standards.

Recertification Compliance

Failure to comply with recertification requirements will result in the expiration of certification, removal of the Certificant's credential, and a revocation of the rights afforded program certificants.

10. Verification of Certification Status

Employers and other third parties may enter an IPC Certification Serial Number into the IPC Credential Verification System to verify the certificate's authenticity.

The IPC Credential Verification System may be accessed at the following URL:
<https://my.ipcedge.org/>.

Upon entering a valid Certification Serial Number, the system will present, at minimum, the following information for validation:

- a. The Certificant's name.
- b. The IPC program completed by the Certificant.
- c. The date the Certificant became certified.

Upon entering an invalid Certification Serial Number, the system will present a message stating that the credential could not be validated.

No information classified as confidential is disclosed through the IPC Credential Verification System.

11. Grievance, Appeal, Change of Scope, Suspension, and Revocation Policies

Grievances

Individuals that encounter a problem with IPC certification assessments, personnel, training centers, certificants, or other elements of an IPC certification program may use the grievance procedure.

The purpose of the grievance procedure is to ensure that:

- a. Individuals that participate in the IPC certification process have a suitable method to communicate any complaint or concern about the process.
- b. Ensure that any issues with the IPC Training or Certification Programs are identified and addressed by the IPC Certification Program Office.

This procedure is the only method of resolving complaints, disputes, and irregularities involving the IPC certification system and IPC certified persons. The procedure does not constitute a legal proceeding or a contract between IPC and the party lodging a grievance and/or appeal.

Grievance Policies

- a. Grievances may not be filed anonymously.
- b. An IPC Director will ensure that the grievance is investigated and handled at the proper level of authorization and if necessary seek the aid of impartial and independent technical experts.
- c. An IPC Director will ensure that the staff member assigned to investigate and resolve the grievance does not have a conflict of interest and remains impartial during the grievance resolution process.
- d. All information obtained during the grievance resolution process is confidential to the extent allowed by law.
- e. Information obtained in the course of investigating the issue will not be disclosed to any third party except as required by law.
- f. Individuals named or referenced in the grievance may be informed about relevant aspects of the grievance.

Grievance Procedure

The party lodging the grievance shall complete and submit the IPC Certification Grievance Form (Appendix A) within 10 business days of the date on which the issue that generated the grievance occurred, OR a maximum of 10 business days following the date on which the individual or group representative could have been reasonably expected to become aware of the issue that led to the grievance.

The party that submitted the grievance will receive an email acknowledging receipt of the IPC Certification Grievance Form within 5 business days of receipt.

An IPC representative(s) may contact the party who submitted the grievance form to obtain additional information.

An IPC representative(s) will investigate the grievance and issue an official finding via email to the party who submitted the grievance form within 30 days from the date on which the form was submitted.

The Right to Appeal

Candidates and Certificants have the right to file an appeal on matters relating to their application, examination, certification, recertification or other matters affecting their status as a candidate or certificant.

Appeals Policy and Procedures

The appeals process outlined in this document is designed to ensure fairness for all certification applicants, candidates, and certificants. There are currently three types of appeals: Eligibility Appeals, Certification Appeals, and Grievance Appeals.

Eligibility Appeals Policy

Applicants that are denied eligibility to sit for a certification exam may request a reconsideration of the denial by filing an appeal with the Certification Program Office at <https://ipcinc.atlassian.net/servicedesk/customer/portal/2>.

Certification Appeals Policy

Candidates that are denied initial certification or recertification may file an appeal in a situation where:

- a. The candidate believes that an error in the scoring of the certification exam occurred.
- b. The candidate is challenging the technical contents of the certification exam.
- c. The candidate's ability to successfully complete the certification exam was hindered by administrative issues or extreme environmental factors while testing.
- d. The IPC EDGE System experienced a system-wide error preventing students from completing their exam. This does not include localized errors occurring at the point of testing.
- e. The candidate believes that an error occurred when evaluating their recertification application.

Grievance Appeals Policy

Grievances are considered closed upon the issuance of an official finding. The original grievant in the official finding may appeal the decision by IPC if any of the following apply:

- a. Additional information or evidence not considered in the original investigation is identified or collected.
- b. The party believes that IPC erred during the investigation or in the application of the most recent version of the IPC Policies and Procedures document.

Appeals Procedure

1. Individuals shall complete and submit the IPC Certification Appeal Form to initiate the Appeals process.
2. Appeals shall be submitted within 10 calendar days from the date on which IPC issues an official finding after investigating a grievance, or 10 calendar days from the date on which IPC denies an Applicant's eligibility for certification, initial certification, or recertification.

3. The party that submitted the Appeal will receive an email acknowledging receipt of the IPC Appeal Form within 2 business days of receipt.
4. The IPC Director of Certification or other IPC representative may contact the party who submitted the IPC Certification Appeals Form to obtain more information.
5. An IPC representative(s) will review the original documentation, the reasoning behind the Appeal, and any new evidence presented through the Appeal. Only the information leading up to the appeal, the documentation submitted through the appeal process, and information gathered through any investigation will be considered as part of the appeal. The appeal shall not include a hearing or similar trial-type proceeding.
6. IPC will issue a final decision via email to the party who submitted the IPC Certification Appeal Form within 30 days from the date on which the form was submitted.
7. The determination of appeals made by IPC shall be final.

12. Additional Policies

Regional Restrictions

The following modifications to the IPC Policies and Procedures apply in Greater China, Thailand, Vietnam, and India.

Certification Proctoring Restriction

Any Licensed Training Center, CIT, or MIT that desires to conduct a certification exam in Greater China, Thailand, Vietnam, and India shall obtain written permission from IPC before scheduling or conducting the exam.

Additional CIT Restrictions

CITs operating within Greater China, Thailand, Vietnam, and India shall also abide by the following restrictions:

- a. A CIT may only train individuals employed by their organization. This restriction does not apply to faculty members of academic institutions, such as technical schools or community colleges that conduct CIS training for their students.

Use of Certificates, Logos, and Marks

IPC certificates are granted the right to use designated IPC certificates, marks, and logos to demonstrate achievements and competencies. IPC certificates, marks, and logos are the property of IPC and shall be used in strict accordance with the guidelines listed in this document as well as local, state, federal, and international laws and regulations. Use of IPC certificates, marks, or logos by individuals that do not hold a valid certification at the time of use is expressly

prohibited. IPC will take legal action and/or publication of misconduct to protect against the misuse of IPC certificates, logos, and marks.

Certificates

- a. Permission to use an IPC certificate, mark, or logo is limited to IPC Certificants who satisfy all certification requirements established by IPC, and shall not be transferred to, assigned to, or otherwise used by any other individual, organization, or entity.
- b. Certificants shall not make any misleading statement regarding the status of their IPC certification.
- c. Certificants shall not suggest that IPC certification relates to persons, activities, processes, products etc. that are not included in the scope of certification.
- d. After suspension, withdrawal, resignation, or expiration of IPC certification, Certificants shall not continue to use IPC certificates, logos, or other expressions that suggest the certification is still valid.
- e. Incorrect, unlawful, or misleading use of IPC certificates and certification marks is considered a critical non-conformity with IPC certification requirements and will result in immediate suspension of certification.
- f. IPC certificates shall not be altered in any way and shall be represented in their entirety.
- g. Use of IPC certificates do not exonerate Certificants from any liability imposed by law regarding the performance of their services.
- h. IPC will take action to deal with incorrect, unlawful or misleading references to certification or use of certificates and certification marks. IPC reserves the right to take any action deemed appropriate, including revocation of certification and legal action.

Logos and marks

- a. Certificants may only use IPC logos and marks legally obtained directly from IPC.
- b. Certificants shall not use IPC logos and marks on test reports, certificates, or other compliance documents.
- c. Certificants cannot authorize a third party to use IPC logos or marks.
- d. Certificants shall not use IPC logos or marks in any way that disparages IPC or its services, infringes on IPC's intellectual property or other rights, contains any objectionable content, or violates any local, state, federal, or international laws or regulations.
- e. Certificants are responsible for any misuse, unauthorized use, or damage caused to any party as a result of their use of IPC logos or marks.
- f. IPC has the right to revoke its permission to use IPC logos and marks at any time, by providing notice to the Certificant.

- g. Certificants shall not translate the text of any IPC logos or marks.
- h. IPC logos and marks shall be represented in their entirety.
- i. IPC logos and marks can be enlarged or reduced as long as the scale is not distorted, and any text remains legible.
- j. Nothing shall be added, removed, or placed in close proximity to any IPC logos or marks.
- k. IPC logos may only be represented in their intended colors or in black and white.
- l. IPC will take action to deal with incorrect, unlawful, or misleading use of IPC logos or marks. IPC reserves the right to take any action deemed appropriate, including revocation of certification and legal action.

Data Management and Privacy Policy

Confidentiality

- a. IPC observes strict legal and ethical guidelines to preserve the confidentiality of candidates, certificates, score results, and all certification related materials.
- b. IPC is the sole owner of the information collected as part of IPC training and certification processes, including the data on the IPC EDGE Learning Management System.
- c. The information collected as part of IPC training and certification processes is used by IPC for identification and verification purposes only and is considered confidential.
- d. IPC does not share or sell contact information collected as part of IPC training and certification processes to third parties.
- e. IPC will not share or sell email addresses collected as part of IPC training and certification processes without the express permission of its owner.
- f. IPC allows third parties to use the IPC EDGE Learning Management System to verify an individual's certification status.

Security

- a. All personally identifiable information collected as part of IPC training and certification processes is stored in restricted and secured databases.
- b. IPC employees that require access to information collected as part of IPC training and certification processes to perform a specific function are granted access on a case by case basis.
- c. Servers that store personally identifiable information are secured in a locked facility.

Notifications

- a. IPC may use personal information collected as part of IPC training and certification processes for identification and communication purposes.
- b. IPC may use personal information collected as part of IPC training and certification processes to notify users about their certification, grievances, disciplinary actions, or any other matter related to IPC training and certification processes.
- c. All written communication from IPC will be delivered via email or postal delivery.

Information Disclosure

Though every effort is made to preserve user privacy, it may be necessary to disclose personal information when required by law, including, but not limited to, circumstances where there is a good-faith belief that such disclosure is necessary to comply with a judicial proceeding, a court order, or legal process.

Additional Information

Additional information concerning the IPC privacy policy can be found at:

<https://www.ipc.org/privacy-policy>

Limitation of Liability

In no event shall IPC be liable for any indirect, special, incidental, or consequential damages, including lost profits of any kind regardless of the form of action, whether in contract, tort (including negligence), strict liability, or otherwise, even if IPC has been advised of the possibility of such damages. This limitation will apply notwithstanding any failure of essential purpose of any limited remedy provided herein. IPC's maximum liability under its certification programs shall not exceed the exam fee paid to IPC for the most recent exam.

Copyright of Materials

Unless otherwise noted on the material or permitted by IPC in writing, any reproduction of IPC materials is strictly forbidden.

Training materials provided by IPC shall only be utilized by Certified IPC Trainers (CIT), or Master IPC Trainers (MIT) to conduct training that leads to issuance of an Official IPC Serialized Certificate.

IPC training and exam materials may not be copied, studied, or otherwise used by anyone other than authorized Certified IPC Trainers (CIT), or Master IPC Trainers (MIT).

The training and examination materials in IPC's Certification programs are the confidential, copyrighted property of IPC. If you copy, reproduce, and/or distribute any training or examination materials, by any means, including by memorizing and reconstructing them, you are violating the legal rights of IPC's Certification program. IPC will use every legal means available to protect the copyrighted materials and secure redress against those who violate copyright law.

In addition to being a copyright violation any reproduction of the training and/or examination materials by candidate or certificant will result in disqualification from IPC's Certification Programs and revocation of your IPC credential.