



CSA Certification Handbook

**CSA Certification Council
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About the CSA Certification Program

The CSA Certification

The Certified Senior Advisor (CSA)[®] certification program is the leading certification designed to recognize professionals who work often or almost exclusively with seniors by evaluating their ability to:

- Identify seniors' needs and issues accurately
- Understand how seniors' values and motivations affect their choices
- Communicate and respond appropriately, effectively, and compassionately to seniors
- Function as a resource for seniors to turn to for help with their concerns and problems.

Earning the CSA certification requires individuals to pass a rigorous exam and to uphold the highest ethical standards for the benefit and protection of the health and welfare of seniors. The goal of the CSA program is to prepare working professionals to adjust to the rapidly changing age demographic by understanding the multiple processes of aging. Typically CSAs have expertise in a professional discipline and have chosen to supplement their existing professional knowledge by earning the CSA certification.

Attention to seniors, and their needs, has never been more important than it is now as a result of a majority of the population getting older and living longer. Professionals who become CSAs recognize this and know that longer lives require better advice and new approaches to aging. They want to know as much as possible about how to serve seniors and make a positive difference in their lives. CSAs understand that getting older is an individual experience – a time to be savored, not feared.

CSAs may use the credential to establish credibility with seniors, identify seniors' needs and issues more accurately, understand how seniors' values and motivations affect their choices, communicate and respond to seniors more appropriately, effectively, and compassionately, and to act as a resource for seniors to turn to for help with their concerns and problems.

Certified Senior Advisors who present themselves as CSAs are required to give consumers the following written disclosure statement prior to the purchase of a product or service:

"Certified Senior Advisors (CSAs) have supplemented their individual professional licenses, credentials and education with knowledge about aging and working with older adults. It is recommended that you verify the validity of any professional's credentials with whom you conduct business and be sure you completely understand what those licenses, credentials and education signify. The CSA certification alone does not imply expertise in financial, health or social matters. For more details visit: www.csa.us."

The CSA certification

The CSA certification program puts people ahead of products.

CSAs are expected to understand the entirety of the experience of aging, because only by understanding seniors in that entirety can professionals add benefit to the services they provide for seniors.

Scope of the CSA Certification

Certified Senior Advisors (CSAs) are professionals, who in the course of their practice, apply multi-disciplinary knowledge of the aging process and aging issues to identify the most appropriate options and solutions for seniors' individual needs and best interests to improve their lives.

The CSA Certification Council

The CSA Certification Council is a separately functioning entity established to oversee the CSA certification program.

The CSA Certification Council operates independently to establish and uphold high standards of competence for CSAs, to evaluate CSAs against those standards, and to increase the public safety of the senior population through the use of the CSA designation.

The purpose of the CSA Certification Council is to:

1. Establish and implement policies and procedures that guide certification decisions, including the granting, maintaining, recertifying, expanding and reducing the scope of the certification, and suspending or withdrawing the certification
2. Review and impose sanctions on CSAs found in violation of the *CSA Code of Professional Responsibility*
3. Develop and maintain a valid, reliable, and legally defensible assessment
4. Assure the trust of the public is served through the certification program
5. Acquire, develop, disseminate, and preserve data and other valuable information that informs the CSA Certification Program
6. Represent and include the interests of interested parties and stakeholders affected by the CSA Certification

Eligibility Requirements

All applicants for the CSA certification must meet these requirements:

1. Complete the Candidate Information Profile
2. Complete the Disclosure Questionnaire
3. Pass the CSA Certification Examination
4. Pass a Background Check
5. Complete the CSA Ethics Module (the CSA's Role, Rules, and Responsibilities)
6. Complete and submit the signed Certified Senior Advisor Application for Certification, which includes agreeing to the CSA Terms of Awarding and Maintaining Certification.

Candidates have 12 months to complete the CSA certification exam after initial enrollment. Once a candidate has passed the CSA examination, the next step is to complete the CSA Ethics Module. Depending on the amount of time that has elapsed between the date a signed Disclosure Questionnaire was submitted, a background check was performed and the date the CSA exam was complete, the CSA Certification Department reserves the right to require candidates to legally attest that the information on the Disclosure Questionnaire is still complete and accurate, and to conduct a new background check and assess an additional administrative fee. The CSA credential will only be awarded to individuals who meet all eligibility requirements.

Definitions

Applicant: An individual who has submitted the Application for CSA Certification

Candidate: An individual who meets the eligibility requirements for CSA Certification.

Certified Individual: An individual who has earned and maintained the CSA Certification and is authorized to use the Certified Senior Advisor (CSA)[®] marks.

Eligibility Appeals

Candidates who are denied eligibility may appeal this decision. The candidate may complete the CSA Certification Appeals Form and submit to the CSA Certification Department within 30 days of receipt of the eligibility decision. The form may be emailed to certification@csa.us or sent via mail. The mailing address of the CSA Certification Department is:

720 S. Colorado Boulevard
Suite 750 North
Denver, CO 80246

The Appeals Committee will review the candidate's information and will make a final decision regarding eligibility. The eligibility appeal will be reviewed within 45 days of receipt of the request for appeal and written notice of the final decision will be sent to the candidate within 30 days of the review.

The appeals form is attached in Appendix D.

Application

The application for CSA certification is included in this *CSA Certification Handbook* (Appendix A) and is available on SCSA's web site at www.csa.us. Candidates may also request a copy by contacting the CSA Certification Department at certification@csa.us or 1-800-653-1785.

Applications will be reviewed for completeness and compliance with eligibility requirements. Incomplete applications will not be accepted.

Electronic signatures will be accepted on the application. In compliance with federal "E-SIGN" legislation, the CSA Certification Department will securely store all online applications, renewal and recertification applications.

All candidates will be notified via email once their application for the CSA certification program has been processed and approved. The email will include detailed directions for how to register for the CSA examination.

Preparing for the Examination

The CSA examination is a 115-question, multiple-choice examination that is comprised of 100 scored items, and 15 unscored pretest items. Candidates are allowed 2 hours and 25 minutes to complete the CSA examination. See the Exam Information page on the CSA website:

<https://www.csa.us/certification/exam-information/>.

The CSA examination was developed as the result of a rigorous development process. Working with experts in the development of certification examinations, SCSA and the Certification Council have developed a reliable and valid certification examination. To validate the examination, measurement specialists worked with the Certification Council, CSA staff, and a committee of CSA Subject Matter Experts (SMEs) to design and conduct a job analysis study. That analysis resulted in the development of a standardized examination content outline developed by CSA SMEs. CSA SMEs were also called upon to write, review, edit, and approve examination questions under the guidance of experts in testing and measurement.

Candidates are encouraged to prepare for the CSA examination. SCSA offers an optional educational course to assist candidates in their preparation. Alternatively, candidates may choose other professional courses, college/university courses or self-study methods to prepare for the examination. This *CSA Certification Handbook* includes the CSA examination content outline which should be reviewed in preparation for the examination. A list of suggested reference materials is also included.

Certification Council Position on Training and Education

Please note that the Certification Council does not require applicants to take prescribed training or education programs from any company or organization. The Council does not recommend or endorse any training or education programs as preparation for the certification examination, nor does it accredit or endorse any source of education as a guarantee of success on the CSA certification examination. Certification is awarded solely on the basis of an individual's ability to meet the certification requirements.

Suggested Reading

The CSA certification represents knowledge about seniors and the health, social, financial and legal aspects of aging that is available from a wide range of sources, some of which are listed below. These include the SCSA textbook, *Working with Older Adults: A Professional's Guide to Contemporary Issues of Aging*, which is the foundation of the optional SCSA course that educates individuals on the core competencies necessary for serving older adults. The CSA Certification Department does not guarantee that the resources it provides, or those of any other entity, will ensure passing the CSA examination. The CSA Certification Department does not require candidates to purchase any of its resources as a condition of qualifying for the examination or awarding the CSA certification.

Books

- Atchley, Robert C., and Amanda S. Barusch. *Social Forces and Aging: An Introduction to Social Gerontology*. New York: Wadsworth Publishing, 2004.
- Bales, Connie W., and Christine S. Ritchie (eds.). *Handbook of Clinical Nutrition and Aging*, 2nd ed. New York: Springer, 2009.
- Bassi, Laurie J., Ed Frauenheim, Dan McMurrer, and Larry Costello. *Good Company: Business Success in the Worthiness Era*. San Francisco: Berrett-Koehler Publishers, 2011.
- Beerman, Susan, and Judith Rappaport-Musson. *Eldercare 911. The Caregiver's Complete Handbook for Making Decisions*. 2nd ed. Amherst, NY: Prometheus Books, 2008. Eldercare Locator. www.eldercare.gov
- Beauchamp, Tom L. and James Childress. *Principles of Biomedical Ethics*, 8th ed. New York: Oxford University Press, 2019.
- Erber, Joan T. *Aging and Older Adulthood*, 3rd edition. Hoboken, NJ: Wiley-Blackwell, 2013.
- The Gerontological Society of America. *Communicating with Older Adults: An Evidence-Based Review of What Really Works*, 2012. www.geron.org
- Hillier, Susan M., and Georgia M. Barrow. *Aging, the Individual, and Society*. 10th ed. Stamford, CT: Cengage Learning, 2014
- Hinrichsen, Gregory A. Interpersonal psychotherapy and psychodynamic psychotherapy. In V. Molinari (vol. ed.), *Specialty Competencies in Geropsychology*. New York: Oxford University Press, 2011.
- Morgan, Leslie A., and Suzanne Kunkel. *Aging, Society and the Life Course*. 6th ed. New York: Springer 2021.
- Quadagno, Jill. *Aging and the Life Course: An Introduction to Social Gerontology*, 8th ed. New York: McGraw-Hill, 2021.
- Till, J., and T. Schneider. *Flexible Housing*. New York: Routledge Press, 2007.
- Rowe, John W., and Robert L. Khan, *Successful Aging*. New York: Dell, 1999.
- Working with Older Adults: A Professional's Guide to Contemporary Issues of Aging*, Society of Certified Senior Advisors, Denver, CO.

Websites

<https://www.medicare.gov/publications/10050-medicare-and-you.pdf>: *Medicare & You 2025*, Centers for Medicare & Medicaid Services, U.S. Department of Health and Human Services

This is not a required reading list. The important topics that candidates should study to successfully prepare for the CSA examination are listed in the examination content outline (see below). Candidates

are strongly encouraged to carefully review the examination content outline to identify any topic areas that may require extra review and study.

Candidates should decide what they want to read and study based on their current experience and knowledge about seniors and aging to determine how much preparation is required for each topic area of the examination.

Examination Content

See the Exam Information page on the CSA website: <https://www.csa.us/certification/exam-information/> for details on the previous examination blueprint if you scheduled your exam prior to the publication of the current blueprint and matrix.

Examination Matrix (effective December 12, 2024)

This exam matrix is provided to illustrate the general distribution of questions and the relative weight or emphasis given to a skill or content area on the examination.

Content Area	Percentage of Examination
The Sociology of Aging	9.0%
Family and Aging	7.0%
Resource and Referral Networks	6.0%
Health and Wellness Aspects	14.0%
Lifestyle Aspects	14.0%
Financial Aspects	24.0%
Care Planning for Adults	9.0%
Legal Aspects	3.0%
End-of-Life Planning	6.0%
Ethical Issues	8.0%
Total	100%

The task list below (effective December 12, 2024) describes the activities which a Certified Senior Advisor® is expected to perform on the job. All examination questions are linked to these tasks.

	Content	Final %	Final
A	The Sociology of Aging	9%	9
	Identify trends in aging		
	Affirm truths about aging		
	Identify social and cultural issues associated with aging		
B	Family and Aging	7%	7
	Identify family dynamics		
	Engage with older adults and their families		
C	Resource and Referral Networks	6%	6
	Develop resource and referral networks		
	Refer older adults and their families to others		
D	Health and Wellness Aspects	14%	14
	Identify healthy lifestyles for aging population		
	Identify physical changes and challenges		
	Identify mental and behavioral changes and challenges		
	Identify the signs and symptoms of potential elder abuse and exploitation		
E	Lifestyle Aspects	14%	14
	Educate and assess the lifestyle situation of the older adult		
	Identify social aspects of aging		
	Identify technological aspects of aging		
	Identify mobility issues		
	Identify sexuality issues		
F	Financial Aspects	24%	24
	Identify concerns older adults and families have about finances		
	Convey the importance of thinking about financial resources (now and in the future)		
	Identify aspects of estate planning		
	Educate about health insurance and benefit options		
	Educate about financial assistance available to older adults		
	Identify options for financing care (short and long term)		
	Identify potential for financial fraud and abuse		
G	Care Planning for Adults	9%	9
	Identify older adult care needs and locations		
	Build a plan for care continuum		
	Identify caregiver needs and support		
H	Legal Aspects	3%	3
	Address importance of legal planning		
I	End-of-Life Planning	6%	6
	Educate older adults/families about end-of-life arrangements		
	Manage end of life details		
J	Ethical Issues	8%	8
	Adhere to CSA and professional codes of ethics and standards		
	Uphold older adults' rights within professional ethical guidelines		
		100%	100

Scheduling the Examination

Scheduling

All candidates will receive an email from the CSA Certification Department with detailed instructions for scheduling the examination at a Pearson VUE testing center. Candidates will have the opportunity to schedule their examination either online or by telephone. The CSA Certification Department will send an email to candidates with a complete list of examination registration instructions. The candidate should contact the CSA Certification Department immediately if they do not receive the emailed instructions.

Availability of Computer Based Testing (CBT) sites

The CSA Certification Department makes it possible for the candidates to sit for the CSA certification examination, at a date and time that is convenient for them, at a Pearson VUE testing center. In order to take full advantage of this convenience, the candidate will need to schedule their examination early. There are numerous other examinees from a wide variety of certification programs who are also taking their exams at Pearson VUE testing centers. Appointments are made on a first-come, first-served basis, according to availability of testing stations. Testing centers can fill up quickly. If the examination is not scheduled early, the candidate may have to delay taking the examination. The CSA Certification Department is not responsible for unavailability of test centers and the candidate will be subject to an extension fee to extend the examination deadline if they delay scheduling the examination. To increase the likelihood of receiving the first choice of date, time, and location, it is recommended that the candidate schedule at least 45 days before their desired examination date. The candidate can schedule their examination for any available appointment time within their eligibility period. If the examination is not scheduled in that time period authorization to test will expire and the candidate will be required to pay an additional examination extension fee. Neither the CSA Certification Department nor Pearson VUE is responsible if the candidate does not schedule an appointment before authorization expires.

Testing centers can be located by visiting the Pearson VUE website: go to www.pearsonvue.com/SCSA then click on “Find a test center.”

Availability of Paper Based Testing (PBT)

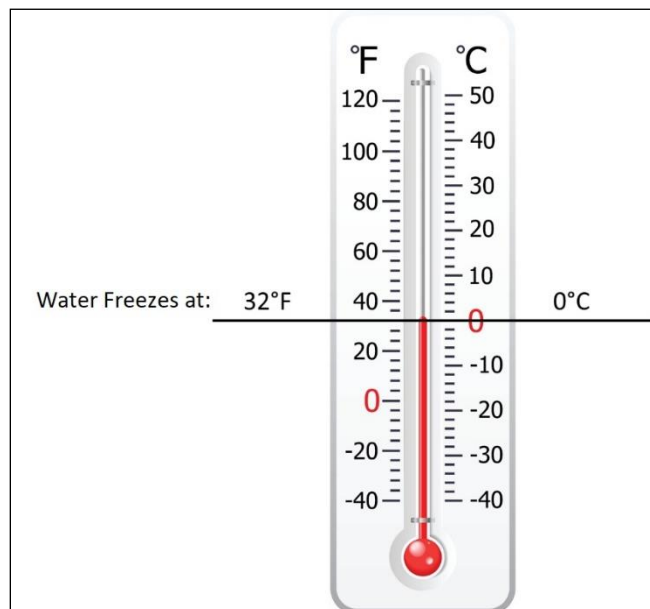
SCSA also offers Pencil Based Testing (PBT) on a case-by-case basis to groups of candidates and/or corporate clients at pre-determined sites in a group setting or corporate setting.

No Show policy

Once the examination appointment is scheduled, the candidate will be permitted to make changes such as location, rescheduling or cancellation. Changes must be made no later than two days prior to the scheduled appointment. After that time, if the candidate does not appear for their examination at their scheduled location on their scheduled date and time, they will be considered a “no-show,” and will forfeit their examination registration fee. The candidate will be required to pay a “no-show” fee in order to register for that examination again. Please contact the CSA Certification Department at 1-800-653-1785 for the fee schedule.

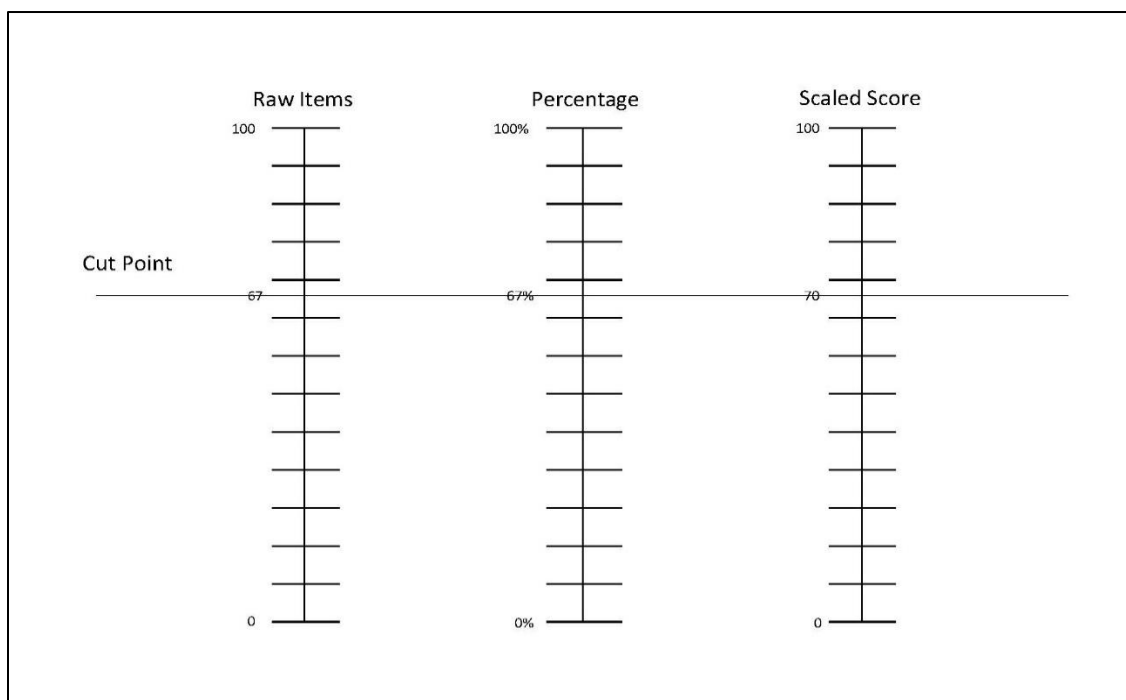
Scaled Scores/Scaling and Equating

The Society of Certified Senior Advisors® uses a scaled score to report scores on the Certified Senior Advisor® Examination. Scaled scores are conversions of scores from one scale to another. An example of two scales you might be familiar with are the temperature scales of Fahrenheit and Celsius. As illustrated, on the Fahrenheit scale, freezing occurs at the temperature of 32° while on the Celsius scale freezing occurs at the temperature of 0°. We don't really have two different freezing points. We just have two different ways of reporting it.



Certification Bodies frequently use scaled scores to report candidate scores because the actual passing percentage or the number of test questions that a candidate has to answer correctly to pass may change based upon the difficulty of the examination. It wouldn't be fair to candidates if some candidates had to obtain a 70% to pass on a very easy test while others had to obtain a 70% to pass on a very hard test.

Thus the passing percentage is adjusted to account for the differences in test difficulty. Consider the graphic below:



There are three scales in the above example. The raw items scale is the actual number of test items that the candidate must answer to pass. The percentage scale is the raw scale converted to a percentage of the exam that the candidate must answer correctly to pass. And the scale score scale is the scale where

the passing score has been converted to another number. To use the scale, let's say a candidate must answer 67 of 100 test items correctly to pass the exam. This converts to a percentage score of 67%. SCSA would scale that number to a 70. Every score above and below the passing score would also be scaled similarly to a Fahrenheit and Celsius scale.

To pass the SCSA examination, the candidate must obtain a scaled score of 70. The actual passing score (raw score and percent score) was determined using a passing score study on a single form of the examination. The passing score study looked at the characteristics of the examination (such as the difficulty of the test items) and used the methodologies of Angoff and Hofstee in a facilitate group meeting, to establish what the point at which the group of experts felt a score higher would represent knowledge to be competent and a score lower would represent a lack of knowledge to be competent. Subsequent forms of the examination are statistically equated to the first form and the raw score necessary to pass adjusted as necessary.

Taking the Examination

All CSA candidates must have prior authorization from the CSA Certification Department to take the examination and present a valid photo ID to the examination proctor, as well as meet all other test security requirements at the examination location. Additional details on taking the examination are provided to candidates in the email they receive from the CSA Certification Department once their application is approved.

If candidates experience problems that affect their ability to take the examination, they must notify a test administrator **immediately**.

Test administrators cannot answer any questions about test items or content of the examination. However, if candidates have a procedural question, the testing staff will do their best to assist them.

If during the examination the candidate has questions or concerns about a test item, they can leave a comment by clicking the "comment" button in the upper left-hand corner of the computer screen if they are testing at a CBT site, or by completing a Candidate Comment Form if they are testing via PBT. All examination questions are copyrighted property of the CSA Certification Department. It is forbidden under federal copyright law to copy, reproduce, record, distribute or display these examination questions by any means, in whole or in part. Doing so may subject the candidate to severe civil and criminal penalties and actions by the CSA Certification Department.

The Test Administrator will keep the official time and ensure that the candidate is given the allotted time of 2 hours and 25 minutes for the examination. If the candidate leaves the room to take a restroom break the examination time will not stop. **Candidates are not permitted to leave the examination area to go to their cars, to speak to anyone, or make personal calls.**

The Test Administrator may dismiss a candidate from the examination for any of the following reasons:

- If the candidate's admission to the examination is unauthorized
- If a candidate creates a disturbance or gives or receives help
- If a candidate attempts to remove examination materials or notes from the testing room

- If a candidate attempts to take the examination for someone else
- If a candidate has in his or her possession any prohibited item
- If a candidate exhibits behavior consistent with memorization or copying of examination items

Examination Security Procedures

Candidates are required to abide by the ID requirements of the examination location or event.

Candidates who are taking the CSA examination at a Pearson VUE testing center (via CBT) must bring one primary ID to the test center per current Pearson VUE guidelines:

- The ID must have your first and last name; a recent, recognizable photo; and your signature. The first and last name on the ID must match the first and last name you used to register for the exam.
- The ID must be original (not a photocopy or digital ID), valid (unexpired), and government issued. **Note:** Expired IDs are acceptable if accompanied by renewal paperwork.
- The ID must be issued from the country in which you are testing (except for EU cards, which are acceptable in any country within the EU Zone). **Note:** If you do not have a primary ID from the country in which you are testing, you must bring an international travel passport. The passport must be issued from your country of citizenship, and the information on the passport must be in Roman characters.

Examples of Acceptable IDs	<p>The following IDs meet the primary ID requirements:</p> <ul style="list-style-type: none"> • International travel passport • Driver's license • Military ID (includes spouse and dependents) • Identification card (national/state/province ID card) • Alien registration card (green card/permanent resident/visa) • Government-issued local language ID (i.e., not in Roman characters) <p>Note: Government-issued local language IDs are not acceptable outside the country from which the ID was issued.</p>
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If you have any questions about Pearson VUE ID requirements, please contact Pearson VUE Customer Service at www.pearsonvue.com/contact. Any exceptions to the ID policy must be pre-approved by SCSA at least five business days before the scheduled exam appointment.

Candidates who are taking the CSA examination in a PBT setting will be required to provide one acceptable form of identification:

- Valid State Driver's License with Photo

- Current Passport book
- Current Military Identification with Photo
- Valid State Identification with Photo

Biometrics

Some Pearson VUE testing centers (all those designated as Pearson Professional Centers and some designated as Select Pearson VUE Testing Centers) require palm vein capture. All centers require electronic signature and a digital photo.

Erasable note board

Standard procedure is that the candidate receives one erasable note board to use as scratch paper during the examination at Pearson VUE CBT sites. At sites used for PBT testing, candidates are allowed to use their paper examination booklet as scratch paper.

Personal items

Candidates are not allowed to bring personal items into the testing room. Consideration is made for comfort items (such as a pillow, crutches, and tissues), which the testing center administrator must inspect. A designated area will be provided in the testing environment for all personal belongings, but neither Pearson VUE nor the CSA Certification Department is responsible for any personal belongings left in the area before, during or after the examination.

After the Examination

Examination Results

Candidates who test at a Pearson VUE center will be provided with a printed report of their results at the completion of their examination. Candidates who test in a PBT setting will be provided with a printed report of their results within 5-7 business days.

Candidates who fail the examination will be provided a diagnostic analysis of their relative strengths and weaknesses by content area, along with their examination results.

SCSA provides diagnostic score reports to candidates. The diagnostic score reports provide data regarding the percentage of items correct in each of the domains. Candidates are cautioned about making inferences based on the diagnostic scores due to the fact that there may not be sufficient items in each of the domains for accurate inferences. This statement is to be placed on all future diagnostic score reports.

Candidates who have successfully passed the examination will be notified of their certification status by the CSA Certification Department. Those who have passed the examination and met all other eligibility requirements will receive a CSA Welcome Packet that includes a CSA certificate and other business and communication items. The individual may then use the CSA initials after their name and use the CSA marks as allowed by the *CSA Code of Professional Responsibility* and the policies of the CSA Certification Council.

Disputed Results

The CSA Certification Department employs a rigorous process to ensure that no errors occur in the scoring of exams, including a quality control scoring audit and statistical analysis of all questions. Due to the accuracy of electronically scored exams, changes as a result of rescoring are highly unlikely. However, a candidate may request a hand-score of his or her exam by filling out and submitting the *Application to Hand Grade Answer Sheet* (included in Appendix B) with the requisite fee. Please contact the CSA Certification Department at 1-800-653-1785 for the fee schedule. All such requests must be sent to the CSA Certification Department within 90 days of the test date, as directed in the application, which is included in the back of this handbook. Applications received after the 90th day will be returned to the candidate.

Retests

Candidates who fail the examination may schedule a re-test by contacting the CSA Certification Department. Re-tests must be completed within 1 year of the initial enrollment date. All candidates must reapply for certification after the 1-year mark.

Re-tests are taken at a Pearson VUE testing center. Candidates who fail the examination via PBT may have the option to re-test at a future PBT site, or may re-test at a Pearson VUE testing center. The CSA Certification Department will provide candidates with retest instructions by email. There is an additional testing fee for each retest.

Please contact the CSA Certification Department at 1-800-653-1785 for a fee schedule.

Maintenance of Certification and Recertification

The CSA recertification program was developed to ensure the continuing commitment of CSAs to the credential and to ensure that CSAs' continued competence is enhanced by the process. Recertification is a vital part of the CSA credentialing program and it is designed to ensure that CSAs increase and expand their knowledge of the health, social, financial, and legal issues facing seniors. The requirements for recertification, and the means by which CSAs demonstrate compliance with the recertification requirements, are based on the philosophy of *continued competence* through recertification. As such, specific recertification requirements have been established.

Certification is awarded for a period of three years, with a fee and Disclosure Questionnaire submitted annually. The CSA maintenance of certification process was developed to ensure the continuing commitment of CSAs to the credential and to ensure CSAs continue to meet minimum standards for certification. The recertification period is three years; however, the Certification Council requires maintenance of certification annually to reinforce the significance of a CSA's commitment to the protection and welfare of seniors.

Annual Maintenance and Reporting Requirements

On an annual basis during the three-year recertification cycle, CSAs must:

1. Complete, sign, and submit the CSA Disclosure Questionnaire
2. Pay the annual fee

As a condition of maintaining certification and continued use of the CSA certification and marks, the CSA must agree to permit the CSA Certification Department to investigate “affirmative answers” on the Disclosure Questionnaire. In so doing, the CSA permits the following actions:

- The CSA Certification Department is empowered to investigate “yes” disclosure answers on renewal forms to clarify or amplify the CSA’s explanation of the affirmative answer(s). Depending on the nature of the affirmative answer, certification office personnel may ask the renewing CSA to provide additional information, and/or it may decide to research the matter on its own.
- The CSA Certification Department is empowered to require sufficient explanations for affirmative answers. In certain cases when certification personnel deems an explanation of an affirmative answer to be incomplete, it reserves the right to require the CSA in question to provide further explanatory information. Depending on the nature of the affirmative disclosure, this additional information might include the following: dates, locations, case numbers, case status, involved parties, summaries of charges and rebuttals, summaries of settlements or other judgments, copies of documents.
- The CSA Certification Department may refer any possible disciplinary issues or possible violations of the *CSA Code of Professional Responsibility* to the CSA Ethics & Disciplinary Council for appropriate action.
- At the Certification Council’s request, the CSA Certification Department may provide a report or other description of affirmative answers received on applications.

The CSA recertification process

The CSA recertification process was developed to ensure the continuing commitment of CSAs to the credential and to ensure that CSAs’ continued competence is enhanced by the process. Recertification is a vital part of the CSA certification program and it is designed to ensure that CSAs increase and expand their knowledge of the financial, health, and social issues facing seniors.

Recertification

The CSA recertification process was developed to ensure the continuing commitment of CSAs to the credential and to ensure that CSAs’ continued competence is enhanced by the process. Recertification is a vital part of the CSA credentialing program and it is designed to ensure that CSAs increase and expand their knowledge of the financial, health, social, and legal issues facing seniors. Recertification is required every three years.

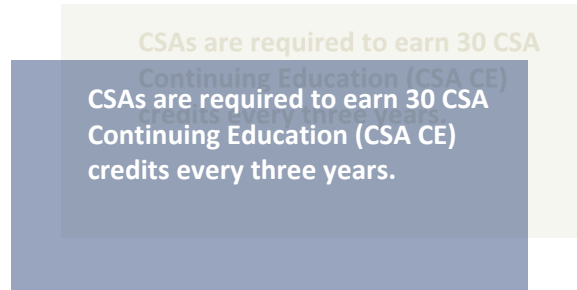
Every three years, CSAs are required to earn 30 CSA Continuing Education (CE) credits, complete the CSA Ethics Module (worth 3 CE credits which applies toward the required 30 credits), must agree to continue to abide by and uphold the *CSA Code of Professional Responsibility*, pass a background check, complete and submit the Disclosure Questionnaire, and comply with the policies of the Certification Council. Failure to comply with recertification requirements will result in the expiration of certification and removal of the CSA credential.

Denial of Recertification

Certified individuals who do not meet the recertification requirements will be notified that their recertification has been denied within 30 days of receipt of the application. The reasons for the denial shall be indicated, and the certified individual shall receive instructions on how to reapply.

Appeal of Denial of Recertification

Applicants who are denied recertification may request reconsideration of the decision of denial by completing the CSA Certification Appeals Form and submitting to the CSA Certification Department. Depending on the reason for denial, the CSA Certification Department will forward the request for appeal to either the Ethics & Disciplinary Council or the Appeals Committee. Requests for an appeal must be made no later than 30 days after the applicant is denied. The decision of the appeal is final.



The appeals form is attached in Appendix D.

Issuing Certificates

A certificate with the dates of renewal is issued to certified individuals upon successful completion of all recertification requirements.

Extensions

CSAs may be granted an extension to meet all recertification requirements for a period not to exceed 120 days. Extensions are granted on a case-by-case basis and at the discretion of the CSA Certification Department staff. The CSA's original date of expiration will remain valid when the new certificate is issued. If the certified individual does not recertify within the designated time period, certification will expire. If in the future the individual wishes to become certified, a new application will be required. All application, examination and fee requirements shall apply.

Continuing Education

CSA professionals are required to earn 30 Continuing Education (CE) credits every three years, with at least three of the 30 credits in ethics via completion of the CSA Ethics Module. Credits applied toward meeting the recertification requirements may be obtained through several options and must be completed during the certification cycle. If a CSA earns more than the required 30 credits during the three-year certification period, credits that exceed the required 30 – and that are earned within the last three months of the cycle – may be carried over, with a maximum of 10 credits eligible for rollover into the next cycle.

To be eligible for credit all CE course topics must be directly related to seniors and/or ethical issues. Acceptable topic areas include ethics; financial, health or social issues related to aging; spirituality and aging; general aging issues; death and dying, etc. Sales and marketing topics are not acceptable. To ensure that the recertification process contributes to the professional development of CSAs across a variety of issues, CE credits must meet the following guidelines:

Ethics: Completion of the CSA Ethics Module (the CSAs's Role, Rules, and Responsibilities) is required of all CSAs for recertification as of January 6, 2025. Upon completion, a CSA is awarded 3 CE credits, and this satisfies the ethics requirement each 3-year cycle.

CSAs are allowed to submit additional ethics CE credits as part of their required 30 credits every three years if desired (in addition to earning the 3 credits for completion of the CSA Ethics Module). Following are available options for additional ethics credits:

- i. One of the CSA ethics courses offered online by WebCE: <https://www.webce.com/csa>
 - Senior Market Sales Ethics (6 CE credits)
 - Maximizing Integrity in Decisions with Seniors (6 CE credits)
 - Effective and Ethical Communication with Seniors (6 CE credits)
- ii. Ethics courses approved for ethics CE credits by other professional organizations on topics directly related to seniors' needs and issues – for example, ethics courses offered by CFP, AICPA or CLTC, or a state L&H or real estate insurance license. These courses must be pre-approved by the Office of CSA Certification.

Volunteering: A maximum of 16 CSA CE credits may be awarded.

- i. 1 hour of CSA CE credit may be awarded for each 1 hour of volunteering for seniors. The maximum number of allowable CE credits earned by volunteering is 16 every three years.
- ii. Providing direct care for a senior relative or family member can be counted as volunteer experience. There is a maximum allowance of 8 CSA CE credits every three years for this type of volunteering.
- iii. 1 hour of CSA CE credit may be awarded for each 1 hour of volunteering as a qualified Subject Matter Expert (SME) actively participating in CSA examination development activities. The following activities are approved for volunteer credit: participating in a job analysis workshop, participating in item writing training and development including the submission of usable examination items, participating in passing score studies.

Course Work: 1 CSA CE credit is awarded for every 45 – 60 minutes of eligible coursework. The total number of CE credits awarded for each eligible course, seminar, or workshop is at the discretion of the CSA Certification Department.

- i. CE courses, seminars or workshops on topics directly related to seniors and approved or offered by a national trade, industry, licensing, or regulatory association.
- ii. State-approved insurance and other professional CE courses on topics directly related to seniors.
- iii. CE courses, seminars or workshops approved or offered by accredited universities and colleges on topics directly related to seniors.

- iv. WebCE courses on ethics and/or topics directly related to seniors www.webce.com/csa

Audit the *Working with Older Adults* course: A maximum of 20 CSA CE credits may be awarded.

- i. 20 CSA CE credits may be awarded by auditing the *Working with Older Adults* course (classroom or web) if it has been more than 12 months since the individual earned the CSA designation. The CSA examination is not required to earn the CE for auditing the course.
- ii. In order to receive all 20 CSA CE credits, CSAs must audit the course (classroom or web) in its entirety.

CSA Webinars: 1 CSA CE credit is awarded for each webinar.

Monthly educational webinars are offered by SCSA for CSAs. Archived webinars can also be accessed on the www.csa.us website through the member portal.

Professional Conferences: A maximum of 12 CSA CE credits may be awarded per conference.

For each day of participation in a professional conference CSAs will earn 6 CSA CE credits, with a maximum of 12 CSA CE credits per conference. The total number of CSA CE credits awarded is at the discretion of the CSA Certification Department based on program eligibility.

Presentations: 1 CSA CE credit is awarded for every 45 – 60 minutes of eligible presentations given by a CSA and directly related to senior issues. A maximum of 10 CSA CE credits may be awarded for presentations.

Credit may only be earned once, unless given to a different audience or on a different subject.

CSA Journal: CSA CE credits may be awarded through completion of the Case in Point section of the CSA Journal and/or writing a published article in the CSA Journal.

- i. 5 CSA CE credits are awarded for reading a Case in Point article and successfully completing the associated online quiz.
- ii. 10 CSA CE credits are awarded for writing an article that is published in the CSA Journal.

CSA Examination: 27 CSA CE credits are awarded for re-taking and passing the CSA examination.

In taking and passing the CSA examination, CSAs may satisfy all continuing education requirements with the exception of the ethics requirement (3-credit CSA Ethics Module).

Verification of Continuing Education Compliance

The CSA Certification Department will review and confirm the accuracy and authenticity of all continuing education submitted for recertification by certified persons. The CSA Certification staff, at their discretion, may require additional evidence or documentation to ensure certified persons are meeting continuing education requirements whenever necessary.

CSA Code of Professional Responsibility

The Code

The CSA Certification Department issues the *CSA Code of Professional Responsibility* to provide ethical principles and rules for all persons who are certified by the Certification Council to use the CSA designation. Implicit in a CSA's acceptance of the certification is an obligation to comply with the mandates and requirements of all applicable laws and regulations, and to take the responsibility to perform all professional services and activities in an ethical manner. An important part of this is the CSA's agreement not to use the CSA certification in such a manner as to bring the Society of Certified Senior Advisors, fellow CSAs, or the CSA Certification Council into disrepute, as any unethical behavior by a CSA diminishes the value of the certification to every CSA. The *CSA Code of Professional Responsibility* is based on the standards of competence, honesty, trustworthiness, fairness, and professionalism.

The CSA Ethics and Disciplinary Council

The CSA Ethics and Disciplinary Council is an independent, nonprofit corporation established to enforce the provisions of the *CSA Code of Professional Responsibility*. The Ethics and Disciplinary Council investigates formal complaints lodged against CSAs for alleged violations of the Code. The Ethics and Disciplinary Council reviews all complaint cases and disciplines CSAs when appropriate.

The *CSA Code of Professional Responsibility* is available on the CSA web site at www.csa.us, or by contacting the CSA Certification Department.

Additional Policies

Special Accommodations

The Certification Council complies with the Americans with Disabilities Act (ADA) and shall ensure no individual is deprived of the opportunity to take the certification examination solely by reason of a disability as defined under the ADA. Candidates must submit a written request and recent (within the last three years) supporting documentation related to disability needs. The request and supporting documentation must be received at least 30 days prior to the examination. Requests for special testing accommodations require documentation of a formally diagnosed and qualified disability by a qualified professional who has provided evaluation or treatment for the candidate.

The CSA Certification Department will evaluate requests for special accommodations in testing procedures on a case-by-case basis.

The ADA Accommodation Request Form is included in this handbook in Appendix C.

Appeal of Denial of Request for Special Accommodations

Candidates who are denied their request for Special Accommodations may file an appeal by completing the CSA Certification Appeals Form and submitting it to the CSA Certification Department. The appeal form must be submitted within 30 days of the initial decision and will be reviewed by the Certification Council. The decision of the Certification Council is final.

The appeals form is attached in Appendix D.

Confidentiality

All information provided to the CSA Certification Department during the examination application and certification process is considered confidential and will not be disclosed unless required by law. In the event the CSA Certification Department is required to disclose information otherwise considered confidential, they will notify the applicable individual via email, mail, or fax of the release of their information.

Indeterminate Scores

The Certification Council is concerned with reporting only valid scores. On rare occasions, circumstances may invalidate exam scores. The Council reserves the right to cancel or withhold exam scores if there is any reason to question their validity. The Council may cancel or invalidate exam results if, upon investigation, violations of policies have been committed.

Doubts may be raised about the validity of candidates' scores because of suspected misconduct; in such circumstances candidates will be notified of procedures to ensure fair treatment. Some scores may be rendered invalid due to circumstances beyond candidates' control, such as faulty exam materials or mistiming. In this event, retesting will be arranged at no additional cost to the candidate.

Issuing Certificates

Certificates are issued by the CSA Certification Department to individuals who meet all requirements for earning certification, including passing the exam. Certificates shall be issued within thirty days of confirmation of completion of the certification requirements. A new certificate with the date of expiration will be issued to CSAs who meet the recertification requirements.

Certification Directory and Verification of Certification Status

The CSA Certification Department will verify the name of a CSA and that the CSA is in good standing at the request of any member of the public. Anyone may verify a CSA's credential by contacting the CSA Certification Department at 1-800-653-1785 or e-mail certification@csa.us. The online CSA Locator allows any member of the public to verify if the professional they are considering is a CSA in good standing. The CSA Certification Department has the right to include all of the following information about CSAs in good standing in the online CSA locator:

- Name
- Contact Information
- Industry/Profession
- Company Information
- Recertification and Designation Dates

No information deemed to be confidential will be disclosed when verifying an individual's certification status.

CSAs' names and standing are considered public information. Use of CSA information for solicitation purposes by businesses or individuals is strictly prohibited by the CSA Certification Department.

Nondiscrimination

The CSA Certification Department and the Certification Council do not discriminate on the basis of race, color, age, gender, national origin, ancestry, religion, disability, sexual orientation or marital status.

Welcome to the Certified Senior Advisor (CSA)[®] certification program and thank you for your interest in applying for certification. This application has been developed to capture necessary information to determine your eligibility for certification. The application must be completed in its entirety, and all fields require an answer. Incomplete applications cannot be submitted. All information will be kept confidential and reviewed by the Certification staff solely for the purpose of determining your eligibility for certification. At the end of the application, you must check the signature box and sign prior to submitting. All inquiries should be directed to certification@csa.us.

- Complete the candidate information profile
- Complete the disclosure questionnaire
- Pass the CSA certification examination
- Pass a background check
- Complete the CSA Ethics Module
- Complete and submit the signed Certified Senior Advisor (CSA)[®] Application for Certification
 - Includes agreeing to the CSA Terms of Awarding and Maintaining Certification
- Agree to abide by and uphold the [CSA Code of Professional Responsibility](#)

Part A - Applicant Profile

Last Name	First Name	Middle Name
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Note: Your first name and last name must appear as they do on government issued ID, such as a driver's license or passport. Two forms of identification are required for you to take the CSA certification examination, and the first and last names on your application and both forms of ID must be identical in order for you to sit for the examination.

Company Name _____

Business Address

Street _____

City _____ State _____ Zip Code _____

Business Phone _____ Mobile Phone _____

Primary E-mail _____

Mailing Address

Street _____

City _____ State _____ Zip Code _____

Home Address (If different from mailing address)

Street _____

City _____ State _____ Zip Code _____

Professional Information

Industry _____	Title _____
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Certified Senior Advisor (CSA)[®] Application for Certification

License(s) Held _____

Certifications Held _____

Part B – Background Check Information

You will be provided with information on submitting the third-party CSA Background Check information and consent. To assist with background screenings, please provide the following information:

Date of Birth: _____ Home County: _____

PART C—Request for Special Accommodations to Test

If you have a disability covered by a national disabilities program (e.g. Americans with Disabilities Act), and you wish to request accommodation for a qualified disability, please check Yes and you will be sent instructions for submitting your request. The request and supporting documentation must be received at least 30 days prior to the examination.

Yes ☐

PART D – Payment Information

The certification fee is \$395.00 which is comprised of an application fee of \$75.00 and an examination fee of \$320.00. The payment that accompanies this application must be \$395. Should your application not be approved for certification, the examination fee may be refunded. The application fee is non-refundable.

Please choose your method of payment:

- ☐ Check: Enclosed is my payment check
☐ Credit/debit card—I authorize CSA Certification staff to charge my credit card \$ _____ USD

Credit Card Information

Card Number	Expiration Date	CVV code
Billing Address	City, State	Billing Zip code
** Signature (authorizes credit card charges)	Print your name as it appears on card	

Cancellations/Refunds: If you are not satisfied with the *Working with Older Adults* Course, we will refund your tuition, minus a \$75 cancellation/administrative fee, when all educational materials are received by SCSA within 30 days of the purchase date and if the exam has not yet been scheduled.

This policy only applies to new enrollments for the course. It does not apply to the CSA Exam, re-certifications, reinstatements, or re-designation purchases. These sales are all final upon purchase.



Certified Senior Advisor (CSA)[®] Application for Certification

Disclosure Questionnaire

As part of your application for CSA certification, you must complete the following Disclosure Questionnaire

You must attach a detailed written explanation for any "yes" answers for questions 1- 6. Note that CSA Certification Staff have the right to investigate affirmative responses. Additional information may be required upon review of your application.

YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	<p>1. Have you ever entered a plea of guilty or no contest to a criminal offense in any of the following categories or been found guilty of a criminal offense in any of these categories (as each is defined below): (1) a felony, (2) a sexual offense, (3) a crime of violence, or (4) a crime of dishonesty?</p> <p style="margin-left: 40px;"><i>Definitions: (1) A felony is any criminal offense defined as a felony offense under the laws of the state where the crime was charged. (2) Sexual offenses include but are not limited to lewd and lascivious conduct, indecent exposure, luring, sexual assault or battery, rape, statutory rape and any criminal offense involving sexual conduct. (3) Crimes of violence include but are not limited to battery, assault, homicide, manslaughter, kidnapping, false imprisonment, child abuse, elder abuse, domestic violence, robbery and any criminal offense involving violent conduct. (4) Crimes of dishonesty include but are not limited to theft, shoplifting, fraud, embezzlement, forgery, perjury, counterfeiting, writing bad checks, money laundering and tax evasion and any criminal offense involving dishonest conduct.</i></p> <p style="margin-left: 40px;"><i>Important note: Sexual offenses, crimes of violence, and crimes of dishonesty must be disclosed even if they are classified as a misdemeanor.</i></p>
<input type="checkbox"/>	<input type="checkbox"/>	2. Within the last 10 years, have you entered a plea of guilty or no contest to any criminal offense or been found guilty of any criminal offense and/or are there currently any criminal charges pending against you?
<input type="checkbox"/>	<input type="checkbox"/>	3. Within the last 10 years, have you been a defendant or respondent in a civil action, which includes, but is not limited to a court proceeding, arbitration, or mediation, or are you currently named as a party in any such action? <i>Bankruptcy proceedings must be disclosed as civil actions in response to this question.</i>
<input type="checkbox"/>	<input type="checkbox"/>	4. Within the last 10 years, have you had a license, permit, certification, registration or membership denied, suspended, revoked or restricted by any governmental, regulatory, or administrative agency, or has any such agency censured, fined, sanctioned, restricted or reprimanded you, excluding non-criminal traffic infractions?
<input type="checkbox"/>	<input type="checkbox"/>	5a. Within the last 10 years, have you been named as a subject of an investigation or complaint by any governmental, regulatory or administrative agency other than a state's Adult Protective Services agency or equivalent state or local government agency?
<input type="checkbox"/>	<input type="checkbox"/>	5b. Within the last 10 years, has any state's Adult Protective Services agency or equivalent state or local government agency notified you that, following completion of an investigation, a complaint against you was substantiated or otherwise determined under applicable law or regulations to be well-founded?
<input type="checkbox"/>	<input type="checkbox"/>	6. Within the last 10 years, have you been censured, fined, sanctioned, reprimanded or otherwise disciplined by any professional certification or credentialing organization to which you did or do belong and/or are you currently under investigation by any such organization?
<input type="checkbox"/>	<input type="checkbox"/>	7. Are you or have you ever been registered with FINRA (Financial Industry Regulatory Authority)? If yes, please supply your CRD#:
<input type="checkbox"/>	<input type="checkbox"/>	8. Are you or have you ever been licensed to sell Insurance? If yes, please include what state(s) and your NPN number:

Attestation Statement

By checking below, I affirm that:

- My answers to the disclosure questions 1- 8 above are true, accurate and complete
- All the information and documentation I have provided in the application is true, accurate and complete
- I understand and agree to comply with the following CSA Terms of Applying for, Awarding and Maintaining Certification:

1. I have read and will comply with all policies contained within the *CSA Certification Handbook*, available for viewing/downloading at the CSA website: https://csa.us/wp-content/uploads/csa_certification_handbook.pdf.
2. I have read and will comply with the *CSA Code of Professional Responsibility*, available for viewing and downloading at the CSA website at https://www.csa.us/wp-content/uploads/csa_code_of_professional_res.pdf.
3. The Society of Certified Senior Advisors® (SCSA) reserves the right to audit my application and related information that I submit to SCSA for any purpose and may take any steps reasonably required to verify the authenticity, accuracy and completeness of any information or documents submitted by me in relation to my application for certification, including contacting third parties to verify any information relevant to my application.
4. SCSA has the authority to investigate my responses to the Disclosure Questionnaire and to perform checks of my background history, including by utilizing background check vendors and investigators and requesting information from court systems, police departments and other third parties. I agree to cooperate with all requests of SCSA related to any investigation of my background history and further understand that providing false, misleading or incomplete information, or having others do so on my behalf, is a violation of the *CSA Code of Professional Responsibility* and CSA Policies and may result in sanctions.
5. I will immediately inform SCSA of any changes to the information included in this application, and for as long as I am certified by the CSA Certification Council, and I am required to do so within 30 days of any change. This obligation includes any changes in circumstances that would affect responses I've given to the CSA Disclosure Questions. I also agree to immediately inform SCSA of any matters that may affect my capability to continue to fulfill certification requirements.
6. I will comply with all policies and requirements of the CSA Certification Council. If certified as a CSA, I will comply with all standards and requirements that the CSA Certification Council may issue from time to time, including usage standards for the Certified Senior Advisor (CSA)® certification and all CSA Marks (as defined below). I acknowledge that SCSA and the CSA Certification Council are not responsible for any usage standards put in place by outside entities. I will uphold the highest standards of professionalism and integrity in all personal and professional conduct. I will not engage in any behavior or make any statements—whether in person, in writing, or via digital or social media—that are discriminatory, harassing, disparaging, defamatory, lewd, unethical, immoral, misleading, or otherwise offensive, or that may reflect adversely on or bring into disrepute the Society of Certified Senior Advisors®, the CSA Certification Council, fellow Certified Senior Advisors, or the CSA credential. I understand that such conduct or communications may diminish the value of the certification and may result in denial or revocation of certification or disciplinary action pursuant to applicable policies.
7. I understand that if I am granted certification, I will be listed in the SCSA online certification directory; however, if in the future should I not want to continue to be listed in the online directory, I will contact the Certification staff to request removal from the list. I understand that even if my credentials are not listed in the online directory, the Certification staff will continue to verify credentials upon request.
8. I authorize SCSA and its staff and affiliates to communicate with me via postal mail, email and text messages (additional charges by my cellular service provider may apply) to provide me with information regarding SCSA and CSA Certification, including but not limited to: (a) transactions with SCSA and its certification vendors; (b) notices about the CSA Certification and examinations; (c) updates to CSA Certification and maintenance of certification policies and requirements; (d) administrative messages and other information; and (e) advertising, marketing, and other materials regarding SCSA's products and services.



Certified Senior Advisor (CSA)[®] Application for Certification

9. I will comply with the CSA Certification Renewal and Recertification requirements to maintain CSA certification, available for viewing and downloading at <https://www.csa.us/certification/certification-requirements/>, which include the requirement to annually answer the Disclosure Questions, pay the applicable annual renewal fee and complete recertification requirements every three years, including completion of 30 CSA continuing education credits, the CSA Ethics Module, and a supplemental CSA Background Check..
10. I UNDERSTAND AND ACCEPT THAT, TO THE EXTENT NOT PROHIBITED BY LAW, IN NO EVENT WILL PROFESSIONAL TESTING INC., SCSA OR THEIR AFFILIATES, OFFICERS, DIRECTORS, SUBSIDIARIES, VENDORS, EMPLOYEES, AGENTS, PARTNERS, SUPPLIERS OR LICENSORS BE LIABLE FOR: ANY INDIRECT, INCIDENTAL, SPECIAL, PUNITIVE, COVER OR CONSEQUENTIAL DAMAGES (INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOST PROFITS, BUSINESS INTERRUPTION, REVENUE, GOODWILL, USE OR CONTENT) HOWEVER CAUSED, UNDER ANY THEORY OF LIABILITY, INCLUDING, WITHOUT LIMITATION, CONTRACT, TORT, BUSINESS INTERRUPTION, LOSS OF OPPORTUNITY, WARRANTY, NEGLIGENCE OR OTHERWISE, EVEN IF PROFESSIONAL TESTING, INC. AND/OR SCSA HAS BEEN ADVISED AS TO THE POSSIBILITY OF SUCH DAMAGES. THE AGGREGATE LIABILITY OF PROFESSIONAL TESTING INC., SCSA AND THEIR AFFILIATES, OFFICERS, DIRECTORS, SUBSIDIARIES, VENDORS, EMPLOYEES, AGENTS, PARTNERS, SUPPLIERS OR LICENSORS RELATING TO CSA CERTIFICATION SERVICES WILL BE LIMITED TO THE GREATER OF: (A) THE AMOUNT ACTUALLY PAID BY ME FOR THE CSA CERTIFICATION SERVICES (IF ANY) IN THE TWELVE (12) MONTHS PRECEDING THE EVENT OR CIRCUMSTANCES GIVING RISE TO SUCH CLAIMS; OR (B) ONE HUNDRED DOLLARS (\$100 U.S.D.). THE LIMITATIONS AND EXCLUSIONS ALSO APPLY IF THIS REMEDY DOES NOT FULLY COMPENSATE ME FOR ANY LOSSES OR FAILS OF ITS ESSENTIAL PURPOSE
11. Upon being granted CSA certification, SCSA provides me with limited, revocable permission to use the mark Certified Senior Advisor (CSA)[®] and all related marks, including all CSA trademarks, logos, badges and electronic or paper certificates issued by the CSA Certification Council (collectively, the "CSA Marks"), valid for a period of three years, as long as I remain in good standing with the CSA Certification Council and use the CSA Marks in accordance with SCSA's trademark usage guidelines. In the event of the expiration, suspension, revocation, nonrenewal or voluntary withdrawal of my CSA certification for any reason, my permission to use the CSA Marks is automatically terminated and I will immediately cease and desist using the CSA Marks, and refrain from communicating or implying in any way that I am CSA certified. I acknowledge that, upon the termination of my permission to use the CSA Marks, I am exclusively responsible for ensuring that any third party displaying or using the CSA Marks on my behalf, including but not limited to websites, marketing and advertising agencies and commercial printing services, immediately ceases and desists using the CSA Marks. I further understand that, if a third party that provided services to me in connection with the CSA Marks does not cease and desist using the CSA Marks within thirty (30) calendar days of the termination of my permission to use the CSA Marks, I will be required to reimburse SCSA for all legal fees and expenses it may incur in taking legal action against any such third parties to stop them from using the CSA Marks without permission. The CSA Certification Council may publish on its website names of individuals who have used the certification in an unauthorized manner.
12. The CSA Certification Council, following the recommendation of the CSA Ethics and Disciplinary Council, has the absolute and unrestricted right to revoke or suspend my CSA certification, including any rights I may have to use the CSA Marks, if it finds that I have failed to comply with the CSA *Code of Professional Responsibility* or the CSA Policies. The CSA Certification Council has the authority to publish on the CSA website names of individuals for whom the right to carry the CSA certification has been revoked or suspended or otherwise discontinued for any reason.

☐ I have read, understand, and agree to the terms listed above.

Signature

Print Name

Date

Page 5 of 5

Appendix B: Application to Hand Grade an Answer Sheet

Application to Hand Grade Answer Sheet

Print clearly and legibly all required information requested below.

Last Name _____ First Name _____ Middle Initial _____

Address _____

City _____ State _____ ZIP _____

Daytime Phone Number with Area Code _____ Fax Number _____

Email Address _____

Date of Examination _____ Candidate Number _____

Hand-grade requests must be made within 90 days of your test date. Applications received after the 90th day will be returned to the candidate.)

Hand Grade Fee: \$25.00

Please enclose one of the following methods of payment with your application as shown below:

☐ Check or money order payable to Professional Testing

☐ VISA

☐ MasterCard

Name on card: _____

Signature of cardholder: _____

Billing address on credit card statement _____

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M M Y Y
Expiration Date

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Credit Card number (do not use spaces or dashes)

Application with check payment must be mailed to:

Professional Testing, Inc., PO Box 691226, Orlando, Florida 32869-1226

Application with credit card payment must be mailed or faxed to:

Professional Testing, Inc., 301 East Pine St #505, Orlando FL 32801. Fax 407-264-2855

I understand that this process will confirm that the answer sheet was correctly graded. This process is performed by Professional Testing, Inc..

SIGNATURE: _____

Results will be mailed to you at the address you list above, with a copy sent to the CSA Certification Department.



CERTIFIED SENIOR ADVISOR (CSA)[®]
ADA ACCOMMODATION REQUEST FORM

If you have a disability covered by the Americans with Disabilities Act of 1990 (ADA) and would like to request an accommodation in testing, please complete all sections below and have an appropriate professional (educator, doctor, psychologist, psychiatrist) with current knowledge of your disability complete Section 2 below if your disability is not medical.

As provided in Section 3 below, please submit documentation in support of your request. If you have existing documentation of having the same or similar accommodation provided to you in another testing situation, you may submit such documentation as compliance with the requirements in Section 3.

This form must be completed in its entirety for your request to be processed. Please submit this request as soon as possible as it takes time to review your request and set up an accommodation. The CSA Office on Certification will process your request as expeditiously as possible in order to not delay testing.

Section 1 (To be completed by Candidate)

Please type or print clearly

Name _____

Social Security Number (last 4 digits) _____

Address _____

City _____ State _____ Zip Code _____

Disability _____

By signing below, I attest that the information I have provided on this application is accurate, true and correct to the best of my knowledge. I agree to and authorize the release of the information requested to the CSA Office on Certification for use in determining eligibility for the requested accommodation in testing. If the information provided is not sufficient to evaluate the request, I authorize the CSA Office on Certification to request additional information from me. I understand the CSA Office on Certification reserves the right to verify any and all information in my application, this request, or in connection with my certification. I understand and agree that failure to provide accurate, true and correct information shall constitute grounds for rejection of my application, request for this accommodation in testing, or denial or revocation of my certification.

Signature _____ Date _____

Section 2 (To be Completed by Candidate or Appropriate Professional)

Please Type or Print Clearly

From Professional:

I have known _____ since _____
(Full name of candidate) (Date)

In my role as a _____
(Professional title)

The candidate has discussed with me the nature of the certification examination to be administered. It is my opinion that because of this candidate's disability as detailed on the attached letter and supporting documentation, he/she should be accommodated by providing the following (please check all that apply):

- ☐ Reader
- ☐ Scribe
- ☐ Extended time
 - ☐ Time-and-a-half
 - ☐ Double time
 - ☐ More than double time (please justify)
- ☐ Separate testing area
- ☐ Use of computer or other adaptive equipment
(Please specify) _____
- ☐ Other (please specify) _____

To be completed by Candidate:

Name _____

Signed _____ Date _____

To be completed by Professional:

Name _____

Signed _____ Date _____

Title _____

License # & State _____

Organization _____

Address _____

City _____ State _____ Zip Code _____

Phone _____ Fax _____

Email _____

Section 3 (To be completed by Candidate or Appropriate Professional)

If requesting accommodations due to a learning disability, please submit relevant diagnostic test results detailing the specific nature of the candidate's disability as it relates to the request and the reasons for requesting the accommodation.

If requesting accommodations due to a medical issue, please have the appropriate professional submit a letter detailing the nature of the disability and the reasons for requesting the accommodation. The letter must be written on the professional's letterhead and must have an original signature. This letter may not be dated longer than 3 years prior to this application.

Please Note: All requests for special accommodations must be mailed to the address below:

CSA Office on Certification
Attn: Exam Accommodations
720 S. Colorado Boulevard
Suite 750 North
Denver, CO 80246
Ph: 800-653-1785
Certification@csa.us

720 S. Colorado Blvd. Suite 750 North, Denver, CO 80246
Phone: 800.653.1785 Fax: 303.757.7677 www.csa.us

Revised 7/27/2023



CSA Certification Appeals Form

Name of Person Filing an Appeal:

First Name

Last Name

Contact Information:

Email

Phone Number

Are you a CSA? (Circle One) **Yes** **No**

Please select the option that best describes the reason for your appeal:

- ☐ Appeal for the denial of initial certification
- ☐ Appeal for the denial of recertification (excluding disciplinary actions)
- ☐ Appeal for the denial of request for special accommodations (ADA)
- ☐ Appeal for disciplinary actions of suspension or revocation

The request for appeal must be submitted in writing via the CSA Certification Appeals Form within 30 days of the receipt of the decision related to the complaint. All requests for appeals must be submitted to the CSA Certification Department.

Please provide detailed information regarding your appeal:

The CSA Certification Department will acknowledge receipt of your appeal within 2 business days.

Revised 4/27/2021