# UCSB Actuarial Association
# Exam Reimbursement Instructions

## Eligibility Requirements

To be eligible for the reimbursement program, you need to meet the following requirements at the time of applying:

1. Enrolled at UCSB and NOT graduating within 4 weeks.
2. Enrolled in one of the PSTAT department majors: Actuarial Science, Statistics and Data Science, Financial Mathematics and Statistics.
3. Registered and paid for membership with UCSB Actuarial Association

For an exam attempt to be eligible for reimbursement, the exam attempt must be:

1. An attempt that received a passing grade of the exam.
2. Have at least one passing attempt of a different exam prior to the attempt which you are applying for reimbursement.

## Step 1: Fill out and sign the application form

See the following detailed instructions about items on the application form:

**I-1 Name:** Put both your legal name and any preferred name listed on UCSB records

**I-4 Major:** Note that you are required to be formally enrolled in one of the PSTAT majors to be eligible for the reimbursement program. PSTAT majors include: Actuarial Science, Statistics and Data Science, Financial Mathematics and Statistics.

**I-6 Upcoming Change of Degree Status:** If you are expecting a change of degree status within the upcoming 3 month of filing this application, check "Yes", otherwise check "No".

**I-7 UCSB Email:** Your @ucsb.edu email for primary communication purposes

**I-8 Other Email:** A non-UCSB email for backup communication purposes, in case your UCSB email account terminates after graduation.

**I-9 International student status:** "international student" refers to any student that enters the United States on an non-immigrant visa, including but not limit to F-1, J-1 visas. If you answer yes to this question, you are required to submit additional identification documents for your reimbursement application.

**II-1 Exam to be reimbursed:** Title (Abbreviation) of the exam which you are applying reimbursement for. Enter only one exam for each form.

**II-2 Amount:** The amount of exam fee which you paid and are applying reimbursement for. Make sure your put the exact paid amount in US Dollars, as shown on your exam order history.

**II-3 Date of Exam:** Make sure you put a date that matches the record on your transcript.

**II-5 Order #**: The SOA order number for the exam to be reimbursed. A printable version of the order history is required as Supplemental Document I.

**II-6 Previous Exam Passed:** Title (Abbreviation) of an exam passed prior to the exam to be reimbursed, regardless of whether that exam was reimbursed. Entering one such exam is sufficient.

**II-7 Date of Previous Exam:** Date of the previous passed exam as shown on your transcript. A printable version of your exam transcript is required as Supplemental Document II.

# Step 2: Acquiring Supplemental Documents

The following supplemental documents are mandatory unless otherwise specified. Requirements of the documents, as well as how to acquire the documents from SOA, are provided below. If you are applying for reimbursement for a CAS administered exam, you may instead provide equivalent documents acquired from CAS. You may submit additional documents as needed to supply the required information (for example, need both a CAS transcript and a SOA transcript to show passing grade of two exams).
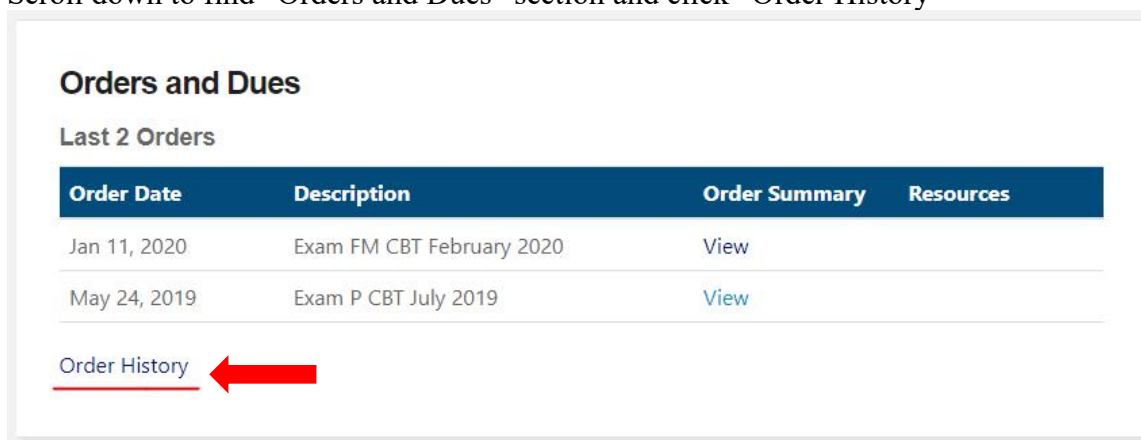
## Document I: Exam Order History

The Exam Order History must show your name, the exam that you ordered which matches the exam that you are applying reimbursement for, and the amount you paid for the exam.

To acquire order histories of exams from SOA:

Go to https://www.soa.org/login/?ReturnUrl=/mysoa/account/ and login.

Scroll down to find "Orders and Dues" section and click "Order History"



Select appropriate date range or simply select "All", and find the order for the exam that you are applying reimbursement for. Click on the order #.

Double check the order details and then click "Printable View".



In the pop-up window, click "Print" and save as PDF.

## Document II: Exam Transcript

The Exam Transcript must show a passing grade for the exam which you are applying reimbursement for, as well as at least one other passing grade for an exam prior to the exam you are applying reimbursement for.

To acquire exam transcripts from SOA:

Go to https://www.soa.org/login/?ReturnUrl=/mysoa/account/ and login.

Go to "My Education and Exams"

Click "Transcripts"

## Education and Exams

### Your active exam(s) and e-Learning

| Order Date | Description | Order Summary | Resources |
|---|---|---|---|
| ✓ No active exam(s) and e-Learning | | | |

Transcripts ← ucational History

Click "View Transcript"

You are here: My Account » My Transcripts

To sort by Program ID(exam) or Date click on the column heading

| Select | Program ID | Course | Date | Candidate ID | Grade | Performance |
|---|---|---|---|---|---|---|
| Grade Slip | EXAMFM | Financial Mathematics | 2/14/2020 | | 07 | |
| Grade Slip | EXAMP | Probability | 7/16/2019 | | 09 | |

View Transcript ←

Click "Printer Friendly Version"

**ASA Courses**
EXAMFM - 02/14/2020
EXAMP - 07/16/2019

Printer Friendly Version ←

Click "Print This Page" and then save as PDF.

SOCIETY OF ACTUARIES

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ID:
**Huaiyu Zhang**

Today's Date: 11/3/2021

## <u>International students only:</u>
**Document III: Passport ID Page**
**Document IV: Recent I-94**

If you are an international student, please also provide clear PDFs of your:
      - Passport ID page
      - Most recent I-94 (Acquire from https://i94.cbp.dhs.gov/I94/#/home#section)

# Step 3: Submit Your Application

Use this Google form for all information and document submission:
https://forms.gle/GA4MU8zXuAASv327A

For any questions or request of support, please contact Anna Theogarajan at academic-coordinator@ucsb.edu