The Construction Documents Technologist (CDT®) Handbook for Certification Candidates is a guide for understanding the application steps and deadlines, content outline, lists of reference materials and study resources, as well as CSI certification policies.
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INTRODUCTION

CSI and the CDT®

The Construction Specifications Institute, Inc. ("CSI") is a national association of more than 7,000 industry professionals dedicated to advancing building information management and the education of project teams to improve facility performance. CSI members include specifiers, architects, engineers, contractors, facility managers, product representatives, manufacturers, owners and others who are experts in building construction and materials.

CSI owns, uses and licenses others to use several copyrighted works, including MasterFormat, UniFormat, OmniClass, PPDFORMAT, and SectionFormat/PageFormat, each of which present a standardized arrangement of construction information. CSI also owns, uses and licenses others to use several registered trademarks and service marks, including CSI, MASTERFORMAT®, UNIFORMAT®, OMNICLASS®, PPDFORMAT®, and SECTIONFORMAT/PAGEFORMAT®, and the certification marks CDT®, CCCA™, CCS®, and CCPR™.

CSI educates and certifies individuals in several construction and design-related areas. Through CSI's certification programs, you can develop and strengthen your understanding of the entire project delivery process and demonstrate your advanced skills in:

- Developing construction documentation;
- Administering construction documentation;
- Writing and enforcing construction specifications;
- Researching and sourcing construction products; and
- Communicating with construction designer and contractor teams.

Don't skip reading this Handbook. Why? Understanding the procedures involved in taking a certification exam is extremely important to increase your chances of success on your journey toward earning your Construction Documents Technology (CDT®) certification. Earning the CDT certification demonstrates to your colleagues and to potential clients that you have acquired and proven your knowledge of CSI's recommended practices, including mastery of the following knowledge domains:

- Fundamentals;
- Project Conception & Delivery;
- Design Process;
- Construction Documents;
- Procurement;
- Pre-construction;
- Construction; and
- Life Cycle Activities.
To be certified, you must meet CSI’s eligibility requirements, apply to take the CDT Certification Exam (“Exam”), pay the Exam fee, and take the Exam. If you pass the Exam, CSI will allow you to use CSI’s distinctive CDT certification mark with your name and credentials for a certain period of time. To continue to use the CDT certification mark, you must show that you are up to date with developments in CDT-related knowledge by fulfilling certain continuing education requirements.

Candidate Profile

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<tr>
<th>ELIGIBILITY REQUIREMENTS</th>
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<tbody>
<tr>
<td>Experience and Job Training</td>
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<tr>
<td>Education</td>
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<tr>
<th>CAREER INFORMATION</th>
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<tbody>
<tr>
<td>Common Job Titles</td>
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<tr>
<td>Typical Education Paths</td>
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</tbody>
</table>

Membership in CSI is not required to sit for any CSI certification exams. However, CSI members access exam-related and other benefits, including reduced rates for exam registration, study material purchases, and CSI live event or online course registrations for required continuing education. For more information on membership, visit: www.csiresources/membership.
EXAM APPLICATION

How to Apply for and Schedule the Exam

1. Check online at https://www.csiresources.org/certification/cdt for the dates that CSI offers the Exam during a certain period of time (each “Exam Cycle”).

2. If you will have availability during the Exam Cycle, complete an exam application online.
   
a. Log in to https://www.csiresources.org/certification/mycertifications with your username and password. If you are a new user, you will need to create an account. Be sure to use an email address you personally monitor carefully (not an info@...) to ensure that CSI can reach you.
   
b. Select “Get Certified” on the “My Certifications” page.
   
c. In the “Apply for New Certifications” box, select “Apply for Construction Documents Technology Certification.”
   
d. Select one of the CDT® application types:
      • CDT: Professional applying to take the exam in the USA, US Territories or Canada.
      • CDT Student: Student currently enrolled at a university or college. You will need to upload a photo of your current, valid student ID, a current transcript, or other verification that shows you are currently enrolled.
   
e. Review and agree to the terms and conditions, then select “Continue.”
   
f. Enter the number of years of experience that you have in the AECO profession or the number of completed units of college coursework that you have earned in construction management (or related field).
   
g. Pay the required application fee (“Application Fee”) by entering your credit card information and submit payment. *Application fee does not include CSI membership, which is optional.

3. CSI will email you:
   • A receipt for showing the application fee paid; and
   • An Authorization To Test (“ATT”). If you do not receive an ATT within a week of completing your registration application, or if you misplace your ATT, contact CSI at certification@csinet.org.

IMPORTANT: Check your spam folder for emails from CSI or Prometric. Add email addresses from Prometric (@prometric.com) or CSI domains (@csinet.org) to your safe senders list, especially csi@csinet.org (the email address the ATT will be sent from).
4. Upon receiving your ATT email, use Prometric’s online scheduling system, ProScheduler, to select the location, date and time you want to take the Exam by going to [www.prometric.com/CSI](http://www.prometric.com/CSI). You may also call Prometric at 1-800-813-6779 between 8 am and 5 pm Eastern time. You may choose to take the Exam:

- **In-person at a Prometric Test Center:** Select “Locate” under “Actions” or follow the instructions for Option 1, “To schedule your exam at a Prometric Testing Center”; or

- **Remotely at your home or office:** Follow the instructions for Option 2, “To schedule a Remotely Proctored Exam.” Before scheduling a remote exam using the ProProctor™ application, you must complete the Computer and Network Systems check at [https://rpcandidate.prometric.com/Home/SystemCheck](https://rpcandidate.prometric.com/Home/SystemCheck) and review this important information: [https://www.prometric.com/proproctorcandidate](https://www.prometric.com/proproctorcandidate) (especially the ProProctor User Guide). Applicants testing via the remote proctor testing platform consent to Prometric’s collection of biometrics and video-recordings for the purpose of exam security.

**IMPORTANT:**
1) Chrome is the required browser.
2) Mac Users - check Prometric website for compatibility.
3) You must be in a walled room with no other individuals or pets.
4) Desk area should be clear of any items as well as writing instruments or paper.
5) Use a detachable camera to show a 360° view of the room.
6) Dual monitors are not allowed.
7) Company computers and VPNs may contain firewalls; personal computers are recommended.

***Exam appointments may become scarce toward the end of the exam window. It is recommended that candidates sit for remote exams during the first two weeks of the exam window, in order to allow for potential rescheduling in the event of technical challenges.***

5. Keep a record of the Prometric-confirmed appointment number, date, time, and location for your Exam (“Exam Date”). If you misplace your exam confirmation number, contact certification@csinet.org.

**Groups**

If your firm/college/university/chapter study group is interested in group registration, please email certification@csinet.org for information on CSI’s bulk application process (minimum of 10 candidates required).
ADA Accommodations

If you require accommodations as defined under the Americans With Disabilities Act, please review CSI's Test Accommodations Guidelines prior to scheduling your exam. Requests and supporting documentation must be emailed to certification@csinet.org at least 30 days prior to when you plan to take the exam and before you register. If approved, you will be notified by CSI staff via email that you may proceed to register. After your accommodations are added to your eligibility record by CSI staff, you will be notified via email that you may schedule your appointment.

Religious Accommodations

If your religious beliefs may prohibit you from abiding by any of the policies or procedures contained in this Handbook or in Prometric’s test administration procedures, please notify CSI via email at certification@csinet.org at least 30 days prior to when you plan to take the exam and before you register to determine if you need to request religious accommodations.

EXAM FORMAT

Exam Development

The CDT exam reflects the results of a professional Body of Knowledge Analysis (BoKA) which determined the subject matter areas (knowledge domains) that are important for a Construction Documents Technologist to master. The purpose of a BoKA is to thoroughly review and update the definition of the subject matter to be tested on the exam so that it reflects the current state of the industry and evolving trends in project delivery, design, construction documentation, construction contract administration, and facility management.

The exam represents a significant commitment by CSI to provide an examination that reflects the need for a CDT credential holder to have deeper knowledge of the activities and documents associated with the construction stages of a project, along with more exposure to the considerations involved in design, to demonstrate a better grounding, understanding, and current practice in the day-to-day realities of project development.

Exam Specifications and Knowledge Domains

The CDT® exam is a computer-based test that contains 120 multiple-choice questions. Candidates have two and a half (2.5) hours to complete three sections: section 1 - the introduction/tutorial screens, section 2 - the exam form, and section 3 - the post-exam survey.

The proportion of the exam dedicated to each Knowledge Domain is as follows:
<table>
<thead>
<tr>
<th>CDT Domains</th>
<th>% of Exam</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundamentals</td>
<td>12%</td>
</tr>
<tr>
<td>Project Conception &amp; Delivery</td>
<td>10%</td>
</tr>
<tr>
<td>Design Process</td>
<td>12%</td>
</tr>
<tr>
<td>Construction Documents</td>
<td>28%</td>
</tr>
<tr>
<td>Procurement</td>
<td>10%</td>
</tr>
<tr>
<td>Preconstruction</td>
<td>6%</td>
</tr>
<tr>
<td>Construction</td>
<td>16%</td>
</tr>
<tr>
<td>Life Cycle Activities</td>
<td>6%</td>
</tr>
</tbody>
</table>

Exam Content Outline

**Domain 1: Fundamentals**

1A – Job roles and responsibilities of the four project teams

1B – Stages of facility life cycle with associated activities and documents

1C – Written formats

1D – Graphic formats

1E – Legal implications of contract documents

1F – Sustainable design and construction

**Domain 2: Project Conception & Delivery**

2A – Programming, planning, and pre-design

2B – Feasibility and impact studies and facility evaluations

2C – Project budget

2D – Insurance

2E – Project scheduling

2F – Site selection activities and purposes

2G – Planning for commissioning

2H – Delivery Methods

2I – Team selection process

2J – Design and construction services
Domain 3: Design Process

3A – Schematic design documentation
3B – Design development documentation
3C – Design objectives and constraints
3D – Cost estimates and estimating techniques used during design phase
3E – Life cycle costs and value analysis
3F – Procedures to control project variables
3G – Quality assurance/quality control requirements
3H – Documentation of decision-making process
3I – Product evaluation and selection
3J – Building Information Modeling – BIM

Domain 4: Construction Documents

4A – Drawings
4B – Methods of specifying
4C – MasterFormat®
4D – SectionFormat®
4E – PageFormat®
4F – Specification language
4G – Project Manual: Division 00—Procurement requirements
4H – Project Manual: Division 00—Contracting requirements and forms
4I – Project Manual: Division 01—General requirements
4J – Project Manual: Divisions 02-49—Specifications
4K – Hierarchy of general, administrative, and procedural requirements
4L – Warranties
4M – Document coordination

Domain 5: Procurement

5A – Competitive Bidding Process
5B – Addenda
5C – Subcontracting
5D – Direct Negotiating Process
5E – Controlling Variables
5F – Procurement Options
5G – Basis of Payment
5H – Pricing
5I – Purchasing
5J – Availability of Procurement Documents

Domain 6: Preconstruction

6A – Notice to proceed, letter of intent to award, or executed agreement
6B – Contract documents
6C – Preconstruction submittals
6D – Permits and regulatory issues
6E – Preconstruction meetings
6F – Verification of site conditions
6G – Mobilization
6H – Establishing a field office

Domain 7: Construction

7A – Executing the work
7B – Meetings and meeting documentation
7C – Submittals
7D – Site visits, observations, inspections, and stopping the work
7E – Quality assurance/quality control implementation
7F – Contract interpretations and modifications
7G – Measurement and payment
7H – Claims and disputes
7I – Project closeout
7J – Role and responsibilities of facility manager during project closeout
7K – Commissioning activities
Domain 8: Life Cycle Activities

8A – Facilities operation and maintenance
8B – Resource materials
8C – Facility evaluations
8D – Decommissioning
EXAM SOURCE MATERIALS

The Exam is based solely on the documents below:

1. The following CSI works, available in the CSI Bookstore: Project Delivery Practice Guide, Third Edition; MasterFormat Numbers & Titles; UniFormat; and SectionFormat/PageFormat.


You may download copies of MasterFormat Numbers & Titles, UniFormat and SectionFormat/PageFormat when you purchase any of the CSI Practice Guides. Once purchased, download links will be available on your CSI account dashboard, under My Digital Publications.

2. A201 General Conditions of the Contract for Construction by the American Institute of Architects.

EXAM STUDY RESOURCES

• **CSI Project Delivery Study Workbook** (digital publication only)

Formerly known as the CDT® Study Workbook, this digital workbook is designed to be used with the [PDPG 3rd Edition](https://www.csvirtual.org/certification/preparation-offerings), and provides an in-depth review of the knowledge domains related to construction documents and project delivery. It is comprised of more than 100 interactive learning activities, self-assessments, and case studies to enhance your learning. *Adobe Reader DC recommended for optimal functionality.*

• **CSI Virtual Peer Study Community**

Candidates who register for the CDT exam have access to an online study community, hosted within the CSI website. This is a space for you to ask questions and learn from each other. Discussion threads and virtual study groups are candidate-driven, meaning they are led by peers who are preparing to sit for the exam during the same cycle. After registering, monitor your email for the invitation that will guide you to this virtual community of candidates preparing for the exam. If you would like to serve as a leader for your study community, please reach out to volunteer@csinet.org.

• **CSI Chapter Exam Preparation Offerings**

Some CSI chapters offer CDT preparation programs and/or study groups. Visit [https://www.csiresources.org/certification/preparation-offerings](https://www.csiresources.org/certification/preparation-offerings) and contact your local chapter for information about their offerings or recommendation.
CERTIFICATION POLICIES

Review CSI’s complete certification policy manual, including the Code of Ethics for credential applicants and holders online.

Exam content is confidential and is not to be copied, distributed, or otherwise shared. CSI exam application fees are non-transferable to another individual and are non-refundable. Candidates who do not request a deferral at least six days prior to their exam date or the end of the exam cycle, who no-show or otherwise do not sit for the exam, will forfeit all fees. Candidates who then wish to sit for the next exam cycle must re-submit a new application and all required fees.

Rescheduling

To reschedule within the current exam window, contact Prometric via prometric.com/csi or 1-800-503-8991 to select your new exam date within the current testing window and to pay any applicable rescheduling fee.

<table>
<thead>
<tr>
<th># of Days Prior to Your Exam Appointment:</th>
<th>Prometric Rescheduling Fee:</th>
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<tbody>
<tr>
<td>30 days or more</td>
<td>No rescheduling fee</td>
</tr>
<tr>
<td>8 – 29 days</td>
<td>$30 paid to Prometric</td>
</tr>
<tr>
<td>7 or fewer days</td>
<td>Rescheduling not permitted / no refund or credit</td>
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Deferral

If you have a medical or significant personal emergency, you can consider submitting a request to defer for one cycle. Deferred exams must be completed within the next exam cycle (i.e. a spring candidate defers to the next fall exam, and a fall candidate defers to the next spring exam). If a deferred exam is not taken during that timeframe, no refund is provided, and a new application and registration fee will be required to sit for a future exam.

Submit the CSI Deferral Request Form to csi@csinet.org after you have reviewed the policies, process, and fee schedule here: https://www.csiresources.org/certification/cert-faq. The Deferral Request Form is located on the above webpage as well. If you have a scheduled appointment with Prometric, and if a deferral is approved by CSI, you must cancel directly through Prometric via prometric.com/csi or 1-800-503-8991.

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<tr>
<th>Deferral Fee Schedule</th>
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<tr>
<td>If an emergency deferral is approved:</td>
</tr>
<tr>
<td>Registered with no test date scheduled</td>
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<tr>
<td>6 or more days prior to test date</td>
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</tbody>
</table>
Cancellation

To cancel your exam registration, submit a written request to CSI using the Exam Cancellation Request form.

If you have scheduled an appointment at a Prometric Testing Center, it must be cancelled separately through Prometric via www.prometric.com/csi or 1-800-503-8991.

Fees may be due to both CSI and Prometric. Please reference the fee schedules below.

<table>
<thead>
<tr>
<th>Cancellation/Refund Fee Schedule</th>
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<tbody>
<tr>
<td>CSI Refund Request:</td>
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<tr>
<td>8 or more days prior to test date*</td>
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<tr>
<td>Fewer than 8 days prior to test date</td>
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</tbody>
</table>

*If no test date has been scheduled, applicant is eligible for a 50% refund if request is received at least 8 days prior to last day of exam window; no refund is provided for cancellations received fewer than 8 days prior to last day of exam window.

Please note: CSI cannot extend the exam cycle for individual candidates, due to the post-exam analysis and scoring process timeframe.

Retesting

Those who are not successful in passing an exam may retest during the next available exam cycle. Candidates may not take the exam more than once within an exam window. Retests require a new application fee.
Results Distribution

Intermittently, all CSI exams will undertake a “passing score” analysis. This means the research to determine the "cut score" (to pass/fail) cannot be determined until after all candidates have taken the exam and the testing window has closed.

Exam items are individually evaluated and those questions (items) that did not perform as expected are analyzed to determine how to score, modify or eliminate. Items are reviewed by a confidential group of subject matter experts (SMEs), CSI members and staff facilitated by a psychometrician, a.k.a. test development specialist. Once the review is completed, the cut score is set and status reports are sent to individual candidates.

The entire Standard Setting (review and scoring) process takes roughly 6-8 weeks. Results will be emailed to candidates from the sender ElectronicScoreReport@Prometric.com. You can also access your results via Prometric’s Report Validation Portal: https://scorereports.prometric.com/
You passed the CDT exam! What’s Next?

Celebrate! CSI will post your name with others who passed the Exam on CSI’s CDT Certification webpage. Celebrate with your study buddies and others who are certified!

Display the CDT® Certification Mark Digitally and Physically

Now that you are CDT certified, you may use the CDT certification mark as an indicator of your current knowledge and expertise. After passing the Exam, CSI’s digital badge provider, Credly, will email you an invitation to create an account to access your CDT certification digital badge (“CDT Badge”) which you can use on your reports, promotions, social media, email signature and more! CSI’s certificate and lapel pin provider, The Award Group, will also email you an invitation to claim your complimentary paper certificate and lapel pin.

Recertify to Maintain Your Certification

Your CDT certification tells your colleagues, clients and potential clients that CSI verifies that your knowledge of each CDT Knowledge Domain is up to date. This means that, in order to maintain your CDT certification and to use the CDT certification mark, you must keep up with CDT Knowledge Domain developments.

Your CDT certification is valid for three years (“Certification Period”). Maintaining your certification is easy:

1. During your Certification Period, participate in at least 24 hours of continuing education related to the CDT domains. This education may include educational seminars offered by CSI, CSI Chapters or Regions, AIA (and other industry associations) sponsored coursework or technical tours and meetings, each related to the AECO industry and CDT professional practice. CSI publishes a continuously-updated library of CSI-approved CDT educational courses in the CSI Learning Library at https://www.csiresources.org/learning/library. For each hour of CDT education that you complete, you’ll earn a Learning Unit (“LU”).

2. Log into your CSI account and record the details of each LU that you earn. If CSI requests, you may be required to provide attendance certificates or other documents that verify you earned that LU.

3. Check your CSI account periodically to ensure that you will have all 24 LUs before the end of your Certification Period.

4. Pay the CDT certification recertification fee online through your CSI account on or before the end of your Certification Period.

If you do not follow these CDT certification maintenance steps, your CDT certification will lapse and CSI will no longer allow you to use the CDT certification mark or the CDT badge.

To learn more about maintenance of your CSI Credentials, Learning Unit Guidelines, and how to record your Learning Units, please visit: https://www.csiresources.org/certification/recertification and be sure to review all posted policies on the CSI website.

If you have questions about information on the CSI website or in this Handbook, please contact certification@csinet.org.
CSI Certification Exam Candidate Checklist
(Steps to a Successful Exam Experience)

Before Registering
☐ Read the Certification Exam Candidate Handbook for your Exam

4 Months Out
☐ Register for your exam on the CSI website
☐ Watch for your Authorization To Test (ATT) email (coming from csi@csinet.org)
☐ Send CSI your ADA or religious accommodations request, if any
☐ Schedule your exam appointment - https://www.prometric.com/csi
☐ Confirm your photo ID matches the name you enter upon scheduling
☐ Remote Exam? Complete the systems check
☐ Receive appointment confirmation email from donotreply@prometric.com
☐ Engage in CSI’s Peer Study Communities
☐ Schedule time to study and participate in study groups

1 day Before Exam
☐ Confirm your exam appointment - https://proscheduler.prometric.com/scheduling/appointmentsearch

Exam Day
☐ Arrive 15 minutes prior to your appointment
☐ Receive notification of completion email from Prometric.
  *You may also verify completion by visiting: https://scorereports.prometric.com/

6-8 Weeks After Exam Day
☐ Receive results from electronicscorereport@prometric.com