

CDT[®] HANDBOOK

FOR CERTIFICATION
CANDIDATES



The Construction Documents Technologist (CDT[®]) Handbook for Certification Candidates is required reading for understanding certification exam application steps and deadlines, content outline, reference materials, study resources, and 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.

Reading this Handbook is an important step 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 as a Construction Documents Technology holder, including mastery of the following knowledge domains:

- Fundamentals;
- Project concept and delivery;
- Design process;
- Construction documents;
- Procurement;
- Preconstruction;
- 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

ELIGIBILITY REQUIREMENTS	
Education	High School Diploma or Equivalent
Experience and Job Training	College-level coursework and/or two (2) years of experience in construction management is highly recommended

CAREER INFORMATION	
Common Job Titles	Architect, Engineer, CAD Technician, Designer, Design-Builder, Assistant or Associate Designer, BIM Modeler, Architect Intern, Field Engineer, Construction Administration Staff, Product Sales/Technical Representative, A/E/C Firm Support Staff, Student, Educator, Code Official, Commissioning Agent, Project Manager, Construction Manager, Specifier, Construction Attorney
Related Experience	Construction Field Experience, Development of Contract Documents, Performance of Contract Administration or Project Engineering, Project Management, Product Representation, A/E/C Office Experience, Construction Arbitration
Typical Education Paths	An architectural or engineering related degree; a construction related degree; a secondary school education or equivalent

Membership in CSI is not required in order to sit for any CSI certification exams. However, CSI members access exam-related 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. Login to <https://www.csiresources.org/certification/mycertifications> with your username and password, or if you are a new user, you will need to create an account. Be sure to use a personal email address (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, click “Apply for Construction Documents Technology Certification.”
 - d. Select one of the CDT® application types:
 - **CDT:** Professionals applying to take the exam in the USA, US Territories or Canada.
 - **CDT Student:** Student who is 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 click “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.
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: Be sure to 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. 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. You may also call Prometric at 1-800-813-6779 between 8 am and 5 pm Eastern time. You can choose to take the Exam:

- **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
- **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> and review this important information: <https://www.prometric.com/proproctorcandidate> (especially the ProProctor User Guide) . *NOTE: Chrome is the required browser for a remotely proctored exam.*

*** Be advised that remote exams should be scheduled no later than one week prior to the end of the exam window, which may allow for 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”).

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 should be emailed to certification@csinet.org **at least 30 days prior to when you plan to take the exam and before you register.**

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 certificant 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 (2) hours to complete the exam.

The proportion of the exam dedicated to each Knowledge Domain is as follows:

CDT Domains	Concentration
Fundamentals	12%
Project Concept and Delivery	10%
Design Process	12%
Construction Documents	28%
Procurement	10%
Preconstruction	6%
Construction	16%
Life Cycle Activities	6%

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 and 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*.

The Project Delivery Practice Guide, Third Edition, provides fundamental knowledge for the documentation, administration, and successful delivery of construction projects.

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. *A201-2017 General Conditions of the Contract for Construction* (2017 edition) by the American Institute of Architects (<https://www.aiacontracts.org/contract-documents/25131-general-conditions-of-the-contract-for-construction>).

3. *C-700 2018 Standard General Conditions of the Construction Contract* (2018 edition) by the Engineers Joint Contract Documents Committee (<https://www.ejcdc.org/product/c-700-standard-general-conditions-2018/>).

4. Additional Recommended Resource: *200 Series: Standard Agreement and General Conditions Between Owner and Constructor (Lump Sum)* (2017 edition) by ConsensusDocs (<https://www.consensusdocs.org/contract/200-3/>).

EXAM STUDY RESOURCES

- **[CSI CDT® Study Workbook](#) (digital publication)**

A guide to help candidates prepare for the CDT exam. Designed to be used with the [PDPG 3rd Edition](#), this digital workbook provides an in-depth review of the knowledge domains related to construction documents and project delivery. It is comprised of over 100 interactive learning activities, self-assessments, and case studies to enhance your learning. Adobe Reader DC recommended for optimal functionality.

- **CSI 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, watch 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. Contact your local chapter for information about their offerings or recommendation.

CERTIFICATION POLICIES

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.

# of Days Prior to Your Exam Appointment:	Prometric Rescheduling Fee:
30 days or more	No rescheduling fee
8 – 29 days	\$30 paid to Prometric
7 or less days	Rescheduling not permitted / no refund or credit

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-faq190>. 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.

Deferral Fee Schedule		
If an emergency deferral is approved:	CSI Fee:	Prometric Fee:
Registered with no test date scheduled	\$200 CSI member \$275 CSI non-member	\$0 due to Prometric
6 or more days prior to test date	\$200 CSI member \$275 CSI non-member	\$30 due to Prometric from the Candidate
a) 5 or less days before test date, or b) you are a “No Show” for a scheduled exam c) you are more than thirty (30) minutes late for the scheduled test start time and will be refused admission to test	Deferral not allowed - Must pay full exam fee for next cycle	

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.

<u>Cancellation/Refund Fee Schedule</u>		
	CSI Refund Request:	Prometric Cancellation Fee:
8 or more days prior to test date*	Amount paid less 50% of CSI Exam Fee	\$30 due to Prometric from Candidate
Less than 8 days prior to test date	No refund or credit. Full CSI Exam Fee is forfeited.	

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

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.

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 and Digital Badge

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/Acclaim, 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!

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") and 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>.

*If you have questions about information in this Handbook, please contact certification@csinet.org.
Wishing you success on your journey toward CSI Certification!*