



ACHIEVING CERTIFICATION

**CERTIFIED RECORDS MANAGER (CRM)
CERTIFIED RECORDS ANALYST (CRA)**

PANEL MEMBERS:

NITZA MEDINA-GARCIA, MISTY MILLER, EMILIE COSTAN, DOUG STEWART



INSTITUTE OF CERTIFIED RECORDS MANAGERS

- International Organization
- Mission is to Develop and Administer CRM and CRA Certifications
- Began Issuing Certifications in 1975
- Developed the Records Management Knowledge Standards and Testing Criteria
- Typically holds a CRM Meeting during ARMA's Annual Conference

www.icrm.org

THE VALUE OF CERTIFICATION

- Broader Understanding of RIM
 - Recognition at Work
 - Job Opportunities / Better salary
 - Recognition in the Field of Records Management
 - CRA / CRM Designation
 - Self Confidence
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CRM AVERAGE SALARIES

Median Salary for CRM in US	\$80,116
Median Salary for CRM in Sacramento	\$85,513
CRM v Non-CRM	31% higher annual median salary

Data from salary.com as of February 22, 2017 and ICRM website.

CERTIFICATION PROCESS

Based on the Following:

- ICRM Application
 - Educational Background
 - Professional Work Experience
 - Passing of a 6 Part Exam Series
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APPLICATION PROCESS

- Application must be accepted before a candidate can register for an exam
 - There is a non-refundable Application Fee of \$100
 - Application must meet Education and Experience Requirements:
 - 4-year (bachelor's) degree from an accredited institution of higher education and 1 year of professional records management experience
 - Or, 1 year of professional records manager experience can be substituted for each year of college education
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EXAMPLES OF PROFESSIONAL EXPERIENCE

- Conducted Studies and Surveys
- Developed, Designed and Implemented RIM Systems
- Direct Managerial or Operational Responsibility for RIM Programs
- Has Taught Courses in RIM for an Accredited Institution Full Time

External, written verification signed by the employer of claimed experience is required.

THE DECISION

Why did you decide to get certified?

Did your employer support the effort?

What benefits did you expect?

Time between decision and taking 1st exam?

EXAM SCHEDULE

Spring 2017

May 1st – May 12th

Reservations Accepted Feb 28th – April 13th

Fall 2017

November 6th – November 17th

Reservations: August 25th – November 2nd

Summer 2017

August 7th – August 18th

Reservations: May 19th – August 3rd

Winter 2018

February 5th – February 16th

Reservations: November 24th – February 1st

CRM EXAMS

Six Part Exam Series

- Part 1 – Management Principles and the Records and Information (RIM) Program
- Part 2 – Records and Information: Creation and Use
- Part 3 – Records Systems, Storage and Retrieval
- Part 4 – Records Appraisal, Retention, Protection and Disposition
- Part 5 – Technology
- Part 6 – Business Cases

Parts 1-5 are 100 multiple choice questions each.

Part 6 contains 2 case studies which require essay responses.

CRM EXAM ADMINISTRATION FACTS

- Administered by Pearson VUE (4,000 locations across US)
- Electronic Exams: Parts 1-5 are 80 minutes each; Part 6 is 4 hours
- Test Fees: Parts 1-5 are \$100 per exam; Part 6 is \$150
- Passing: Parts 1-5 require a minimum score of 70% (*results are received before leaving testing center*); Part 6 is manually graded
- Certification must be obtained 5 years from approval of application. CRAs in good standing have unlimited time to obtain their CRM.

STUDYING

- Taking the Exam: Overview of process <https://www.icrm.org/taking-the-exams/>
 - Exam Preparation Resources: Available for free at <https://www.icrm.org/exam-preparation-resources/>
 - Exam Annotated Outline: <https://www.icrm.org/examination-outline/>
 - ARMA Study Packs: Specially priced bundle packs of reading resources
 - CRM Prep Workshops: Presented by ARMA chapters
 - ARMA Essentials of RIM Certificate: 11 ARMA courses and certificate
 - Sacramento ARMA Study Group
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CRM STUDY STRATEGIES

- Read the ICRM Website thoroughly before each exam.
 - Use Annotated Exam Outlines
 - Search resources, beginning with general RIM books, to find answers
 - Write your answers in a personal version of the exam outline
 - Review your version of the annotated outline
 - Set aside lunch time during the week and/or 4 hours during the weekend
 - Utilize CRM Mentor
 - Take timed practice exam
 - Schedule 1 CRM exam per day for a week
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SAMPLE TEST QUESTIONS

<p>Metadata, described in the broadest sense, is the core set of elements needed for the effective ____ and management of information.</p> <ul style="list-style-type: none">a. Creationb. Storagec. Retentiond. Utilizatione. Retrieval	<p>When developing retention guidelines for collaboration tools, the RIM manager should consider:</p> <ul style="list-style-type: none">a. System security for preserving confidentiality.b. How versions and new documents will be controlled.c. The number and experience of users.d. Copyright standards and laws.e. How system access will be granted.
<p>A major hurricane wipes out several businesses and government buildings. This would be an example of a ____ disaster.</p> <ul style="list-style-type: none">a. Class 1b. Class 2c. Class 3d. Class 4e. Class 7	<p>The term “built-in dispersal” in a vital records program means:</p> <ul style="list-style-type: none">a. Creating an extra copy and storing it in a vault.b. Utilizing an existing copy already routinely held in a relatively secure place.c. Holding copies in a designated office of record.d. Creating microfilm images of records and transferring them offsite.e. Creating a digital image of records and storing the data on an optical disk.
<p>For stability, records center shelving must be provided with</p> <ul style="list-style-type: none">a. Earthquake-proof hardware.b. Heavy gauge steel shelves.c. Sway bars.d. Reinforced steel uprights and end caps.e. Reinforced hold-downs	<p>Storing records on microfilm versus a hard drive ensures records can be viewed:</p> <ul style="list-style-type: none">a. Several weeks from now.b. Decades into the future.c. Without a machine.d. Hundreds of years into the future.e. Permanently.

ANSWERS

<p>Metadata, described in the broadest sense, is the core set of elements needed for the effective ____ and management of information.</p> <p>e. Retrieval</p>	<p>When developing retention guidelines for collaboration tools, the RIM manager should consider:</p> <p>b. How versions and new documents will be controlled.</p>
<p>A major hurricane wipes out several businesses and government buildings. This would be an example of a ____ disaster.</p> <p>b. Class 2</p>	<p>The term “built-in dispersal” in a vital records program means:</p> <p>b. Utilizing an existing copy already routinely held in a relatively secure place.</p>
<p>For stability, records center shelving must be provided with</p> <p>c. Sway bars.</p>	<p>Storing records on microfilm versus a hard drive ensures records can be viewed:</p> <p>d. Hundreds of years into the future.</p>

THE EXAMS

How did you prepare and study?

How did the exam line up with what you studied?

Do you have any advice or tips for taking the exams?

What were your impressions of the exams?

CERTIFICATION MAINTENANCE

- 100 Credit Hours every 5 years
 - Preapproved CRM activities
 - Submit other activities for credit
 - ARMA conference counts towards CRM credit
 - One point = one hour of learning experience
 - Must submit maintenance credits within 6 months of the qualifying event or activity
 - \$200 Annual Dues
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THE IMPACT

How has becoming certified benefitted you?

Has your employer embraced your certification?

Who has taken interest in your certification?

What impact has certification had on your career?

FOR MORE INFORMATION:

Visit:

- www.arnasac.org
- www.icrm.org
- www.arma.org



Thank You!

Questions?

PART 1 – MANAGEMENT PRINCIPLES AND THE RECORDS AND INFORMATION (RIM) PROGRAM

- Principles of Management
 - Human Resource Staffing
 - Financial Considerations
 - Development of RIM
 - Planning a RIM Program
 - Organizing a RIM Program
 - Legal Considerations
 - Directing & Controlling a RIM Program
 - Program Implementation Cycle
 - Ethics & Ethical Responsibilities
 - Global Concerns
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PART 2 – RECORDS & INFORMATION: CREATION & USE

- Records Creation
 - Documentation of Business Transactions
 - Correspondence Management
 - Documentation of Policies and Procedures
 - Forms Management
 - Mail Management and Facilities
 - Electronic Communications
 - Reprographics Management
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PART 3 – RECORDS SYSTEMS, STORAGE AND RETRIEVAL

- Basic Concepts
 - Filing Systems
 - Information Retrieval
 - Active File Systems
 - Active File Operations
 - File Conversions
 - Records Centers Owned & Operated by the Organization
 - Commercial Records Centers
 - Special Storage Requirements
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PART 4 – RECORDS APPRAISAL, RETENTION, PROTECTION AND DISPOSITION

- Basic Concepts
 - Archives
 - Records Inventory
 - Records Appraisal
 - Retention Schedules
 - Vital Records Program
 - Business Continuity
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PART 5 – TECHNOLOGY

- Micrographics
 - Reprographics
 - Imaging Systems
 - Systems
 - Records Creation
 - Data Management
 - Data/system Disposition
 - Preservation, Recovery and Destruction Techniques
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PART 6 – BUSINESS CASES

- 50% - Major Case Study
- 50% - One of Two Shorter Cases

(must pass parts 1-5 first)
