

# CRA and CRM Credentials



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# Who is the Certification Body?

- ❖ The Institute of Certified Records Managers (ICRM)
  
- ❖ Confers four designations
  - ❖ Certified Records Analyst (CRA)
  - ❖ Certified Records Manager (CRM)
  - ❖ Certified Records Manager/Nuclear Specialist (CRM/NS)
  - ❖ Certified Records Manager/Federal Specialist

Note: Organizations that can write and administer a Part 7 exam that tests for industry-specific RIM knowledge not identified on any of the current CRM examinations, may qualify to have a Special Designation in RM that individuals in the relevant profession can pursue once they have obtained their initial CRM certification.

# The Value of Being a Certified Records Manager (CRM)

- ❖ Higher Salaries - the RIM knowledge gained through the certification examination preparation process, and elevation of confidence that is achieved as a result of mastering related competencies, is directly related to the CRM's ability to garner higher-level RIM positions with commensurate salaries
- ❖ Elevated Skills Set - no other professional RM certification does what the CRM does in elevating one's skills and competencies to a level that is continually benchmarked against standards set by the RIM profession; standards that do not lose their relevancy in the midst of changing technologies
- ❖ Knowledge Competency - the continuing education requirements ensure professionals remain current in their skills and competencies and can assist organizations in the deployment of successful RIM strategies

# What are the CRA and CRM?

- ❖ The CRA and CRM credentials provide a strong foundation of core skills and competencies for the RIM professional
- ❖ Both cover everything from the creation and use of records and information, records systems, storage and retrieval, to records appraisal, retention, protection and disposition
- ❖ The CRM:
  - ❖ Also covers management principles, the records and information (RIM) program and technology
  - ❖ Demonstrates your ability to apply and convey your knowledge to upper management, clients and other constituents (writing skills - two business case studies)

# Qualifications

- ❖ The preferred qualifications for both:
  - ❖ A college degree (four-year or bachelor's degree) and one year of professional records and information management (RIM) experience
    - ❖ One additional year of professional RIM experience may be substituted for each year of college not completed (i.e. a high-school graduate with five years of professional RIM experience could apply)
  - ❖ 3 years college PLUS two years professional level RIM experience OR
  - ❖ 2 years college PLUS three years professional level RIM experience OR
  - ❖ 1 year college PLUS four years professional level RIM experience OR
  - ❖ High School Diploma or GED PLUS five years professional level RIM experience

# Education

- ❖ Minimum acceptable education
  - ❖ Graduation from high school (completion of 12 grades) or equivalent (e.g. GED credential or equivalency diploma)
  - ❖ *And* five years professional level RIM experience
- ❖ Preferred education - 4-year (bachelor's) degree from an accredited institution of higher education (does not need to be RIM)
- ❖ Partial credit (in half-year increments) may be given for acceptable credit hours short of a bachelor's degree
- ❖ All claimed education must be documented by either official transcripts or a photocopy of the diploma
- ❖ Partial education (credit hours short of a degree) must be documented by official transcripts

# Professional Work Experience

- ❖ Minimum acceptable professional (RIM) experience:
  - ❖ One year with a Bachelor degree or higher
  - ❖ Acceptable experience may have been acquired if you have:
    - ❖ Conducted studies and surveys
    - ❖ Developed, designed, and implemented records or information management systems
    - ❖ Had direct managerial or operational responsibility for RIM programs
    - ❖ Taught (full-time) RIM courses in an accredited college/university
  - ❖ Required: external, written verification signed by the employer of claimed experience containing sufficient detail to determine if the work meets the standards described above
  - ❖ Verification: must include dates you held the job responsibilities described
  - ❖ Documentation can come directly from the employer or from you
  - ❖ “Employer” can include a supervisor, manager, company owner or director, or someone from the Human Resources office
  - ❖ If job descriptions meeting the above criteria are not available, letters from employers or clients can be considered as long as they contain the needed information

# APPLICATION PROCESS

- ❖ For both the CRA and CRM
  - ❖ Complete and submit an ONLINE application
  - ❖ Include supporting documentation indicating acceptable education and professional work experience
  - ❖ Include your non-refundable application fee (currently \$100 USD)
- ❖ At this point, you are now an “Applicant”
- ❖ All submitted material is reviewed and evaluated to determine if the qualification requirements have been met
- ❖ Applicants failing to meet mandatory qualifications are required to resubmit a new application form
  - ❖ If it has been more than one year from the original application date, a new processing fee is required
- ❖ Upon acceptance by the ICRM, you are now a “Candidate” – eligible to take the exams



# Registering to take the Examinations

- ❖ A Candidate is eligible to register for exams during the next open registration period using the ICRM website.
- ❖ Registration for an exam is a two-step process.
  - ❖ Log on to the ICRM website ([www.icrm.org](http://www.icrm.org)) and click on “View Personal Details”.
  - ❖ Click on “Exam Status” and select the exam cycle you wish to test.
  - ❖ Select the exams you wish to take during that cycle
  - ❖ You will need to wait up to 24 hours for the information to be transferred to Pearson VUE.
  - ❖ Your exam status will change to “Authorized”
- ❖ Once “Authorized” you can click on the current exam cycle (far left of the screen under “Exam Cycle” – a direct link to the Pearson VUE ICRM landing page) to schedule your exam and arrange for payment directly with Pearson VUE.
- ❖ Consult the ICRM website for dates, deadlines, and check payment options.

# EXAMINATION PROCESS - CRA

Attaining the Certified Records Analyst (CRA) designation requires successful completion of:

[Part 2 - Records and Information: Creation and Use](#)

[Part 3 - Records Systems, Storage and Retrieval](#)

[Part 4 - Records Appraisal, Retention, Protection and Disposition](#)

Each exam consists of 100 multiple-choice questions

Candidates are allowed 80 minutes for each part, including 5 minutes for administrative purposes

All examination questions are in English

## CRA Benefit

- ❖ Once you attain your CRA and become a member of the Institute, you have an unlimited timeframe (at your own pace) to pursue passing Parts 1, 5, and ultimately 6 to attain the CRM. This is due to the fact that the CRA is actively pursuing Certification Maintenance Points; furthering their individual development.

# EXAMINATION PROCESS - CRM

Attaining the Certified Records Manager (CRM) designation requires successful completion of :

[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 through 5 each consist of 100 multiple-choice questions. Candidates are allowed 80 minutes for each part, including 5 minutes for administrative purposes.
- ❖ Part 6 includes 3 essay questions, one mandatory, and a choice of one from the other two. Candidates have a four hour time limit, including 5 minutes for administrative purposes. Part 6 requires a well thought, detailed response in a business case format.
- ❖ All examination questions are in English. The answers to Part 6 must be written in the English language.

# Additional Testing Information

- ❖ Parts 1 through 5 questions are chosen as equally as possible from all parts of the [Examination Outlines](#). The questions in each part are based on fundamental records and information management practices, and are meant to represent the best practices in the industry. Questions are NOT included in the test bank if they refer solely to the practices of a specific country, vendor or company.
- ❖ If English is not your native language, you are entitled to an additional 20 minutes of test time for each of Parts 1 through 5, and an additional one hour of test time for Part 6. Candidates requiring this additional time should request approval from the Regent for Exam Administration ([examadmin@icrm.org](mailto:examadmin@icrm.org)) prior to registering for an exam.

# Examination Fees and Locations

- ❖ Parts 1 – 5 \$100 (for US and Canadian)
- ❖ Part 6 \$150
- ❖ Examinations are given by Pearson VUE (<https://home.pearsonvue.com/>), a third-party independent testing service
- ❖ All payments must be in United States currency

## Refunds

Candidates can cancel exams up to 24 hours prior to the scheduled exam by calling Pearson VUE directly. Candidates failing to show up for scheduled exams, or calling less than 24 hours prior to their scheduled exam, forfeit any fees paid.

# Taking the Examination

- ❖ A Candidate may sit for all of Parts 1 through 5 of the examination during the same testing week, or they may take as many, and in any sequence they desire
- ❖ Part 6 can be taken only after the candidate has passed the first five parts
- ❖ Candidates may retake any part of the examination as often as necessary, however, an exam can only be taken once during a given exam cycle

## Part 6 Test Administration

- ❖ Part 6 is an essay type examination administered on a computer with no spell check, and formatting (such as cut and paste) is very limited
- ❖ Erasable notepads available
- ❖ You have 4 hours (minus 5 minutes for administrative items) to complete the exam
- ❖ You will be presented with three 50 point case studies from which you will select two cases to answer
- ❖ Once you complete the first case study you can review your answer
- ❖ When you confirm you have completed the first case study you will automatically be given a 10 minute break
- ❖ When you return from break, select one of the two remaining 50 point case studies to answer
- ❖ When you confirm the second case study is completed, the exam is over.
- ❖ You may use the navigation button at the bottom of the screen to move forward and backward through the essay items of each question
- ❖ You will not be able to navigate back and forth between case studies
- ❖ At the conclusion of each essay, you will have the opportunity to review and make changes
- ❖ Do not press the “End Review” button until you are ready to submit your essay
- ❖ Once the “End Review” button is pressed, you will not be able to go back to review or change your essay



# Grades

- ❖ The passing score for each part of the examination is 70%
- ❖ Parts 1 through 5 at a Pearson VUE testing site: you will receive your exam results immediately upon completion of testing
- ❖ Part 6: exam answers are graded by current CRMs who are qualified graders
  - ❖ Each exam is graded by two graders
  - ❖ The higher of the two scores is counted
  - ❖ Candidates will be notified via email by the Regent for Exam Administration and Grading once all Part 6 exams are graded and confirmed
  - ❖ The Part 6 grading process takes approximately 6 weeks to complete

# Examination Feedback

- ❖ Feedback is provided to Candidates who are unsuccessful in passing an examination part
- ❖ Parts 1 through 5: feedback is individualized and provided before you leave the testing center
  - ❖ Feedback consists of the outline parts of that particular part that contained the questions missed
  - ❖ Candidates can then use that feedback to guide their further study
- ❖ Part 6: feedback is also individualized and provided by the graders who graded each question (each exam is graded by different people)
  - ❖ Feedback is in narrative form providing information on how the Candidate performed in technical knowledge, writing ability, problem analysis and appropriateness of answer.

## Part 6 Appeals

- ❖ A Candidate who fails Part 6 by less than eight points (63%–69%), and who has a legitimate reason to believe that there was a grading error, may make a written request to appeal the failing grade
- ❖ Appeal deadlines vary by cycle and will be provided in the exam results notification
- ❖ Review of contested grades will be performed by the Appeals Committee and shall be processed within 30 days following receipt of the appeal by the Committee
- ❖ Decisions of the Appeals Committee are final
- ❖ The Appeals Committee does not provide feedback on appeals

# Examination Dates

- ❖ Parts 1 through 6 are offered Monday through Friday in the first and second full weeks of February, May, August and November each year.
- ❖ You may select the day, time and location that meet your schedule
- ❖ Candidates who have passed Parts 1 through 5 may, if a test site is available, take Part 6 in the same cycle

# Examination Dates

Term	Testing Dates	Reservation Dates
Winter 2018	02/08/18 – 02/16/18	11/24/17 – 02/01/18
Spring 2018	05/07/18 – 05/18/18	02/23/18 – 05/03/18
Summer 2018	08/06/18 – 08/17/18	05/25/18 – 08/02/18
Fall 2018	11/05/18 – 11/16/18	08/24/18 – 11/01/18
Winter 2019	02/04/19 – 02/15/19	11/23/18 – 01/31/19
Spring 2019	05/06/19 – 05/17/19	02/22/19 – 05/02/19
Summer 2019	08/05/19 – 08/16/19	05/24/19 – 08/01/19

# Exam Preparation Resources

The ICRM offers a variety of resources for CRA and CRM candidates to prepare for the six examinations.

**Recommended Reading** The following publications have been recommended by the Exam Development Committee as excellent preparation resources. They are all available at the ARMA Bookstore:

[\*Records and Information Management\*](#) by Patricia Franks, Ph.D., IGP, CRM, CA, FAI

[\*Records Management for Dummies\*](#) by Blake Richardson

[\*Records and Information Management: Fundamentals of Professional Practice\*](#), 3rd Ed. by William Saffady, Ph.D., FAI

**In addition, specific to Part 1:** [\*Essentials of Contemporary Management\*](#), 7th Edition by Gareth R. Jones and Jennifer M. George, ISBN: 978-1-2595-4547-4

**In addition, specific to Part 5:** [\*Fundamentals of Information Systems\*](#), 7th Edition by Ralph M. Stair; George Reynolds, ISBN-10: 1-133-62962-8, ISBN-13: 978-1-133-62962-7

**Accepted Acronyms** can be found at: <http://www.icrm.org/exam-preparation-resources-acronym>

# ARMA Study Packs

ARMA has created specially priced packages of resources (recommended by the ICRM):

CRA:

<https://members.arma.org/eweb/browse.aspx?site=armastore&webcode=product&id=fb080283-c897-44c9-8bac-f2df1324a013#.WjGKcTdrzcs>

CRM:

<https://members.arma.org/eweb/browse.aspx?site=armastore&webcode=product&id=546f1a0e-beed-4f52-b106-2279eaa079f6#.WjGKHDrzcs>

# Other ARMA Resources

## Essentials of RIM Certificate and CRM Examination Outline

Use this ARMA resource to help you prepare for the CRM exams:

<http://files.icrm.org/wp-content/uploads/2011/08/ARMA-Essentials-of-RIM-and-CRM-2011.pdf>



# Exam Prep and Mentorship Opportunities

- ❖ The ICRM offers a program that is facilitated by its Mentorship Coordinator who will help pair CRM mentors with Part 6 candidates upon request
- ❖ Contact the ICRM Mentorship Coordinator, Howard Loos, CRM, CDIA, at [mentor@icrm.org](mailto:mentor@icrm.org) for more information

# HIGH LEVEL EXAMINATION OUTLINE – Part 1

Part 1 Management Principles and the Records and Information (RIM) Program

<http://www.icrm.org/annotated-outline-part-1/>

Principles of Management

Human Resources/Staffing

Methodologies

Financial Considerations

Planning

Additional RIM Program Components

Directing and Monitoring a RIM Program

Ethical Responsibilities

# HIGH LEVEL EXAMINATION OUTLINE – Part 2

## Part 2 - Records and Information Creation and Use

<http://www.icrm.org/annotated-outline-part-2/>

Information Framework

Risk Assessments and Audits

Compliance

Information Security and Privacy

Information Creation

# HIGH LEVEL EXAMINATION OUTLINE – Part 3

**Part 3 - Record Storage, Retrieval, Conversion, and Facilities**

<http://www.icrm.org/annotated-outline-part-3>

Record Storage

Record Retrieval

Record Conversion

Record Facilities

# HIGH LEVEL EXAMINATION OUTLINE – Part 4

## Part 4 Records Appraisal, Retention, Protection and Disposition

<http://www.icrm.org/annotated-outline-part-4>

Records Inventory

Records Appraisal

Retention Schedule Creation

Retention Schedule Implementation

Retention Schedule Administration

Vital Records Program

Business Continuity

Archives

# HIGH LEVEL EXAMINATION OUTLINE – Part 5

## Part 5 Technology

<http://www.icrm.org/annotated-outline-part-5>

System Life Cycle

Architecture and Infrastructure

Life-Cycle Management

Imaging Technologies

Programs and Applications

# SAMPLE QUESTIONS

The sample questions are offered below are meant as samples only. They are not in the test bank and will not appear on any exam. The answers also list the line in the Outline that each question would be tied to where it is on the exam.

**Part 1** Management Principles and the Records and Information (RIM) Program:

<http://www.icrm.org/part-1-test-questions/>

**Part 2** Records and Information: Creation and Use: <http://www.icrm.org/part-2-test-questions/>

**Part 3** Records Systems, Storage and Retrieval: <http://www.icrm.org/part-3-test-questions/>

**Part 4** Records Appraisal, Retention, Protection and Disposition:

<http://www.icrm.org/part-4-test-questions/>

**Part 5** Technology: <http://www.icrm.org/part-5-test-questions/>

THANK YOU

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