

PRMD Training and You

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THE
NATIONAL
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PRMD 2.3

- ◆ **Agency Records Officers Must Obtain NARA Certificate of Federal Records Management Training**
 - By December 31, 2014, the designated Agency Records Officer for each agency must hold the NARA Certificate of Federal Records Management Training. New incumbents must possess the certificate within one year of assuming the position of Agency Records Officer. Agency Records Officers are generally responsible for overseeing the day to day agency recordkeeping requirements outlined in 36 CFR 1222.22, Subpart B.

PRMD 2.3 Proposal

- ◆ Who does it cover?
 - Anyone listed as agency records officer at <http://www.archives.gov/records-mgmt/agency/officers-lists.html> before December 31, 2014
- ◆ Who does it NOT cover?
 - Agency records officers who already have the Certificate
 - Agency records officers appointed after December 31, 2014
 - Agency records liaison officers
 - Records management personnel who are not the designated agency records officer

Certificate Current Practice

- ◆ Take the KAs, pass the tests, get the Certificate
- ◆ Why do this?
 - Training covers broad spectrum of RM process in Federal context
 - Provides chance to see what challenges other agencies face
 - Gives opportunity to interact with NARA instructors and other agency personnel of all RM levels
 - Shows what information NARA thinks is valuable (helps in meeting 2.4)

PRMD 2.3 Exemption Process

- ◆ If you meet one of the following criteria before December 31, 2014, you do not need to attend classes or take exams:
 - Combination of ICRM certification AND 3 years' experience as the designated agency records officer; or
 - 7 years' experience as the designated agency records officer

PRMD 2.3 Exemption Process (cont)

- ◆ Senior Agency Official (SAO) must submit written request for exemption to Paul M. Wester, Jr., no later than December 1, 2014
- ◆ Requests must indicate:
 - Relevant exemption
 - Description of the records officer's certification and/or experience sufficient for NARA to evaluate the request
- ◆ NARA will respond within 30 days
- ◆ NARA will not provide paper Certificate of Federal Records Management Training to those approved for exemption

PRMD 2.3 Exception Process

- ◆ If you do not qualify for an exemption and will not qualify before December 31, 2014:
 - Take KA 2-6 exams without attending classes
 - Must score 75% or higher on each individual KA examination
 - If don't score >75% on two tries, must attend class and re-take exam
- ◆ NARA will provide electronic versions of course materials
- ◆ No letter required to get an exception
 - Must complete the above by December 2014
 - Contact Bill Bridges first

FAQs

- ◆ **If I am approved for an exemption, can I also get an exception and take the exams?**
 - Yes. If you want to have the Certificate of Federal Records Management Training, you may obtain it through the exception process.

- ◆ **What if I have been a records officer for ten years, but in multiple agencies?**
 - You qualify for an exemption, but only if you served all of those years as a records officer.

FAQs

- ◆ **How long is my exemption/exception/Certificate good for?**
 - In perpetuity. We are planning a “re-certification” course for current Certificate holders, but not before CY 2014.
- ◆ **Why aren't other records management personnel afforded the exemption/exception opportunity?**
 - PRMD focuses on records officers responsible for overseeing records management programs
 - We know what ROs do, but duties of other RM personnel vary broadly from agency to agency



PRMD 2.4

- ◆ **Agencies Must Establish Records Management Training**

- By December 31, 2014, all Federal agencies must establish a method to inform all employees of their records management responsibilities in law and policy, and develop suitable records management training for appropriate staff

Current Plans

- ◆ Briefing on designing your own training
 - Who do you design for? What questions do you need to ask going into it? Graphics or no graphics?
 - Possibly morph into Virtual Class
- ◆ Briefings on case studies
 - If interested in working on this, contact Bill Bridges
- ◆ Additional details to come later this fiscal year

Questions?

- ◆ If you want to provide feedback on either 2.3 or 2.4, please do so by EOB Friday, February 22
- ◆ Laurence Brewer (laurence.brewer@nara.gov)
- ◆ Bill Bridges (william.bridges@nara.gov)