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ICRM Mission and Vision Statements

Vision: The Institute of Certified Records Managers® (ICRM) is the certifying body for Records and Information Management (RIM) professionals, recognized and valued by employers and RIM practitioners world-wide

Mission: To certify RIM professionals as Certified Records Managers® (CRM) and administer a certification maintenance program

President's Message

*Debra Gearhart, CRM, FAI
President, ICRM*

The fall is always busy. This year it seemed exceptionally busy with several ICRM initiatives. The Board met two days prior to the ARMA conference in Washington, D.C. with a very busy agenda. Following the ARMA conference, the ICRM held a CRM Exam Prep Workshop in a post-conference setting with nearly 80 attendees! The two day workshop was very successful as enrollment continues to increase. I personally have received phone calls and e-mails from the November test cycle candidates telling me how well the workshop prepared them for taking the exam.

I would also like to personally congratulate four individuals that passed the CRM exam within a two-week period: Lori Wells, CRM, Robert Conti, CRM, Michelle Kirk, CRM and Crista Reba, CRM. This is an outstanding achievement worthy of applause!

Which ARMA region has the most new CRM's this year? If you guessed the

Southeast Region, you're correct...with the Canadian Region in second place. As of Sept. 30, 2011, there were a total of 1,062 CRM's and 128 new approved applicants. The number of new applicants has increased slightly. Another interesting

fact is that the average CRM candidate has eight and a half years of experience before they apply to take the exam.

At our Annual Business Meeting on October 18, 2011, the ICRM announced a new award to be presented each year to a CRM that has made a significant contribution through their mentoring activities. The new award titled, "The Alan Andolsen

Award," will be selected by a committee after receiving nominations and will be presented at the annual business meeting. Do you know of a CRM that consistently hosts study groups, presents at workshops, or works individually with candidates? Start thinking of who you know that is worthy of being recognized.



The Examination Development Committee (EDC) has been working all year on a new Examination Outline for the CRM exams. The new Examination Outline can be found on the ICRM website and will be used for the first time during the February 2012 exam schedule. Congratulations to Don Schewe and members of the EDC for a job well done.

This is my last President's Message. Next year I move on to Chairman of the Board and hand the presidential reins over to Juanita Skillman. I must admit, while the presidency of the

Institute has kept me very busy, I have found it to be a fantastic experience. I've met many people and have talked to candidates, as well as potential prospects around the world, about the exam and the benefits of becoming a CRM. I've had the privilege of leading an ambitious and wonderful Board of Regents and look forward to my final year.

Warm regards,
Debra Gearhart, CRM, FAI
ICRM President

President Elect Message

The Board of Regents reviewed and updated the ICRM Strategic Plan as follows:

A. Opportunities for Growth

Goal A-1: Evaluate the marketing potential of the CRM designation to colleges/universities that offer degrees in various information management fields, especially those offering RIM degrees.

Goal A-2: The ICRM is recognized as the international certifying body for professionals in the field of records and information management.

B. Increase Recognition

Goal B-1: The CRM designation is recognized by employers around the world.

Goal B-2: Improve marketing strategy to RIM professionals.

C. Business Process Improvement

Goal C-1: Ensure correct alignment of Board positions and responsibilities to support evolving business requirements

Goal C-2: Continually improve the CRM examination content.

Goal C-3: Explore opportunities for increasing the institute's financial resources to benefit membership.

Goal C-4: Ensure consistency and continuity of the Institute's strategic processes

Examination Development

The Exam Development Committee has spent the past year completely revising the Outline for the CRM examination. This is done every five years, but this time the EDC had an additional tool to help them, ARMA International's Core Competencies. The Outline is now completely aligned with the Core Competencies.

The Outline was then augmented by an Annotated Outline providing Candidates with a great deal of information about what to study to prepare for the CRM exam. This Outline also took cognizance of the changing field of Records and Information Management by placing more emphasis on electronic messaging, project planning and other recent additions to the field, and reducing emphasis on directives management, mail rooms and other areas that have lost emphasis in the workplace. At the same time, all of the 3500+ questions in the test bank were reviewed and those that were outdated were removed. The new Outline and Annotated Outline will be available at the ICRM website as part of Preparing for the CRM Examination--A Handbook after January 1, 2012

Newsletter Publishing Schedule

ProfessioNotes is published four times a year (winter, spring, summer and fall) by the ICRM. Deadline to submit items for the Winter issue of ProfessioNotes is February 1, 2012. Articles, inquiries, letters to the editor, or other comments should be directed to Stephen M. French, MMC, CRM, Editor, (937) 535-1005 or by e-mail at sfrench@moraineoh.org.

PR, Marketing and Professional Development

Rae Lynn Holiday, MBA, CRM

ICRM Regent for PR, Marketing and Professional Development

Public Relations, Marketing and Professional Development was very active and advanced several strategic plan initiatives. The Certified Records Manager (CRM) Examination Preparation Product is in pre-deployment stage and was marketed to ARMA chapters at the 2011 ARMA Conference. Implementation of the new content management system for improved marketing and communications through the ICRM website continues.

The ICRM e-newsletter, "Candidate Connections," will accompany the Exam Prep Product deployment. A policy was developed for the deployment of social media, and new content and messaging was developed to support key areas of change under the ICRM's qualification standards.

- ICRM Logo Use Guidelines and official logo is now available on the website. You must login first to review and download the documents.
- Coordinated ICRM Post Con CRM Exam Prep Workshop held October 20-21, 2011 after the ARMA Conference. The Post Con was a success with 80 attendees; the largest number over the past three years.
- Coordinated the 2011 Annual Reception. There were 228 attendees at this year's event.

The ICRM will start out 2012 with a Bang as it launches the CRM Examination Preparation Product

The Institute of Certified Records Managers (ICRM) will launch its licensed CRM Examination Preparation Product to ARMA chapters and industry-specific associations in January of 2012. The Product is designed to be deployed "in the trenches," so that the Institute can more effectively reach CRM candidates and assist them in the exam prep process. The Institute is the certifying body for ARMA International and NIRMA. By licensing the ICRM Exam Prep Product for deployment through ARMA chapters and industry-specific associations, it can provide broad outreach to prospects and CRM candidates. In turn, ARMA chapters and industry-

specific associations can provide a great service to their members.

ARMA chapters and industry-specific associations have a great opportunity not only to market the CRM but to also deliver quality exam prep for CRM candidates. Chapters are able to set their pricing for this service and only pay an annual fee to the ICRM in order to use the licensed Exam Prep Product to host relevant workshops.

The ICRM has received great enthusiasm on behalf of the ARMA chapter presidents and other leaders about the Product, and its ability to support the growth and advancement of their members as well as to promote their associations. The ICRM looks forward to working with ARMA chapters and industry-specific association leaders, CRM prospects, candidates and CRMs to promulgate this expanded service.

We've received significant interest from CRMs regarding the ICRM Speaker's Bureau that will be deployed with the Product in January. It is exciting to see this level of interest and willingness on behalf of the membership to support others in their pursuit of the CRM, and to give back in such a great way. As members of the ICRM Speaker's Bureau, you will receive a copy of the final draft of the list pre-launch, and a copy of the CRM Examination Preparation Product Guidelines.

Thanks so much to everyone who is already actively supporting these efforts, and we are looking forward to working with many more of you to successfully deploy the Product.



Dr. Mark Langemo, CRM, FAI, Rae Lynn Holiday, CRM and Dan McGlynn, CRM at the 2011 ICRM Annual Business Meeting



Tera Ladner, CRM, Stephanie McCutcheon, CRM, Julie Spencer Colgan, CRM, Sheri Nystedt, CRM, ICRM Booth at ARMA Conference



David McDermott, CRM, FAI at the 2011 ICRM Annual Reception

Photos courtesy of Peter Kurilecz, CRM.

Introduction to Twitter

(Second in a Three Part Series)

Jesse Wilkins, CRM, Information Certified



I am one of the Twitterati. I use it every day to interact with my professional colleagues, longtime acquaintances, analysts, and many others. If I were made to choose between email and Twitter, I'd drop the former like a hot potato. And I talk a lot about the value of Twitter for individuals and organizations. Almost every time I do, questions come up about managing Twitter in the context of the records program. So here's my take on it.

On the one hand, Twitter has been likened to a cocktail party. You don't try to follow every conversation at the party; rather, you catch a snippet of interesting conversation and drift closer to catch the rest. If it remains interesting, you remain; if it doesn't, you drift off to the next conversation. Or it's like a water cooler or break room where people gather to exchange gossip, talk about the day or the weekend, and gripe about a particular problem.

On the other hand, Twitter does produce a record of what is posted. While this may not be a record in the ERM sense, it is nevertheless recorded information that could have business value to the organization. And the courts have long held that the "recordness" of a piece of information is not as important from a discovery perspective as a) its existence and b) its responsiveness to a particular matter. This leads then to the question I noted earlier - or, rather, two questions: what to capture, and how to capture it. I will address the second part in a subsequent article.

There are a number of considerations as to whether something should be retained as a record. As always, individual organizations' mileage will vary considerably depending on your regulatory and legal environment.

1. Does it contain evidence of your organization's policies, decisions, or activities? For example, many municipalities have begun using Twitter as another channel for reverse 911.

2. Does it offer or provide evidence of a transaction or contract? A number of vendors including Dell Computers, many airlines, and lots of restaurants and fast food joints have published deals, discounts, and links to coupons using Twitter. In at least one instance, a UK court issued an injunction via Twitter.
3. Is it original information that is not documented elsewhere? On the other hand, the reverse 911 system also uses text, telephone, and other communications channels as well. Maybe it's not the content of a given Tweet that is the record, but rather the fact that that content was transmitted through reverse 911 at such a time through all these given channels. Similarly, a significant number of Tweets are used to share links to other resources. Most of those Tweets would not be records either - rather, the resource they linked to would be.
4. Is there an expectation that the account is monitored? In the reverse 911 example, what if someone responds to the Tweet, via Twitter, indicating some type of an emergency? Many of those same municipalities have put a policy in place to address this. The short version is something along the lines of "This account is not actively monitored. If you have an actual emergency please dial 911". In the absence of such a policy, users may be more likely to be confused and the organization is more likely to be at risk.



5. Is the account public or private? If the account is public, I tend to think it reduces the need to actively archive, declare Tweets as records, and so forth because in the event of an audit, public records request, or discovery, providing the content is as easy as posting the public URL. But if the account is private, it is not part of the public Twitter stream, it is not archived by the Library of Congress, and is not accessible through Twitter Search. In that case there is a much better argument to be made for a more formal process that involves capturing the Tweets outside of Twitter and managing them appropriately.

This is probably a bit more controversial because it's not directly related to the type of content being posted or transmitted. But it has defensible roots in discovery. One of the key considerations for producing information is whether it is privileged for any of a number of reasons including attorney-client communications. That privilege can be breached - for example by the client forwarding the message thread to someone else or posting it to a public website or forum. But privilege goes to the expectation of privacy - and in 2011 it is inconceivable that there would be any expectation of privacy for a public Twitter account or any other public social media site.

Did I mention I'm not a lawyer and this is not legal advice?

Note also that even public accounts can send private communications using direct messages, or DMs. These are directly analogous to email messages or private streams and should probably be treated in similar fashion - that is, they should be captured outside of Twitter and managed appropriately.

The bottom line is that just like any other type of format or media, whether a Tweet is a record or not will depend on what it is and its context. Organizations should put policies in place that outline how Twitter and other social media will be used - and then follow that policy.

--Jesse Wilkins, CRM, Information Certified, is the Director, Systems of Engagement at AIIM International. For more information on this topic please contact him at jwilkins@aiim.org

Call for Newsletter Articles & Information

Stephen M. French, MMC, CRM, Editor

The ICRM newsletter provides for a primary communication tool between the Board of Regents, its standing committees and the membership and as a source for information relevant to its core mission, vision, values.

If you would like to submit a professional article, recommendation or have additional information that you feel would be appropriate for the Newsletter, please contact me at (937) 535-1005 or by email at sfrench@moraineoh.org.

The deadline to submit articles for the 2012 Spring issue of ProfessionNotes is March 31, 2012

Editorial Policy

Authors' statements, either fact or opinion, are their own and do not express the official policy of the ICRM. While the advice and information in this newsletter are believed to be true and accurate at the time of publication, neither the authors nor the editor can accept any legal responsibility for errors or omissions. The ICRM makes no warranty expressed or implied with respect to the material contained herein. Letters to the Editor are welcome. Letters must be signed and are subject to editing.

Certification Maintenance

Between April 2011 and October 2011 83 pre-approval requests were processed. Of the 83 requests, 45 were from ARMA International, 23 from Lorman Educational Services and 9 were AIIM seminars or courses.

Member in the Spotlight

For the winter issue of ProfessionNotes, we have a special guest, Sharon D Burnett, CRM, a native Pacific NorthWesterner. She writes that she, "has always lived in Washington State. I was born in Tacoma and grew up in Federal Way. Currently I reside in University Place - approximately four miles from where I was born! I share my home with the R Gruppe - Kerry Blue Terriers Rocket and Renny. I am a vintage car enthusiast. My current project is a '73 Porsche 911T Coupe." Wow, how does one get a test drive?



Sharon Burnett, CRM

Sharon was a student of many interests in college. "While attending Western Washington University in Bellingham, WA, my primary interests were political science, philosophy, journalism, and history. I also loved music, math and natural sciences. I wanted to major in liberal arts, but didn't have the courage to follow my heart. My big "if I had it to do over" would be to major in liberal arts and attend Evergreen State College in Olympia, WA. Sadly I have never finished my degree. There were cars and guitars. I lost interest in school and became interested in life. I was extremely fortunate to find a full time job with what was at the time a fairly progressive employer."

Sharon was introduced to records management early on in her education. "I learned about records management in the 8th grade from our junior high school librarian when I was a library aide. I used to clip newspapers for our reference files. Our librarian observed that I had a good sense for organization and indexing. She mentioned records management at that time. I was considering becoming a physical education teacher and I thought becoming a librarian would somehow fit my professional dreams as well.

"I've been blessed to have been mentored by some amazing CRMs. Mike Hutchins was an early CRM that I met while he was the records manager for my first employer's research & development division. He made the field seem so alive and exciting. Bob Dalton, who I also met in the same R&D division, has been my other mentor. We have stayed in touch all these years."

When asked how long she has worked in records management, Sharon replied, "It has been awhile - some 30-plus years. I started in micrographics (I had a strong background in film processing) and have worked my way up the career ladder."

When she decided to take the exams for her CRM Sharon said, "... the challenges (I faced) have all been internal. It wasn't as if I didn't know my stuff. I sat for the first 5 exams and passed 4 of them right away. Not bad since I only studied for 1 of them which was Part 1. Part 2 nearly killed me. I took

it three times. It felt like the movie "Groundhog Day". I did not pass Part 6 the first time either. Four years went by. I thought about the retake a lot. I questioned why I wanted... no needed... this certification. I wrote about it on the records management listserv. I contacted the ICRM about a mentor. Although I got signed up, independent me never tapped into the resource. Instead I went back to the ICRM study guide and re-read the section on Part 6. Everyone says to follow the instructions. If you got this far you know what you are doing. I just had to believe, focus, and DO IT!"

Along the way, Sharon had some interesting experiences which she shared. "One of my very first ever special projects started while I was still in the micrographics department. I was asked if I'd like to take on filming engineering drawings for our corporate engineering (CE) department. Never one to turn down an opportunity to work with something new, I took on the assignment. CE was located in an old building in the Port of Tacoma. The facility was right on the Blair Waterway. My camera was located inside a small room just off the loading dock. Some of the engineers told to make sure I pounded on the wall before I went out there to scare all the wharf rats away. Yuk!!!

"If there is a trophy for most creative filing system ever I've got a nomination. I worked with an engineer who had set up and maintained his own filing system for years. My mission was to convince him that he should allow me to convert his system to the standard filing system that had been developed for his area. All I knew about the client was he was difficult. I was given an overview of the non-conforming system. Basically the files were arranged in the order of a road trip. So if he was going to drive to all the mills in the US and Canada this is how he would go. He had a map and an index. Seemed like a lot of extra work to convince him to allow me to convert. I asked him if the system worked for him. He said yes and I left it at that. There were others who had no system. Best to move on."

Sharon was asked how she would characterize her career. She wrote, "My career has been interesting. I entered the workforce a couple years before the advent of the PC, so I had the opportunity to work with mainframe & mini computers. Computer operation was a part of my job for a time. The company I worked for was a beta test for the first ever computer assisted microfilm retrieval system (ADSTAR). We had a Prime minicomputer. I think my cell phone has more computing capability than that room full of stuff in serious need of air conditioning to survive. I participated in that same company's Office of the Future project. One of our very first IBM PCs was on my desk. We didn't have any software yet. We had DOS (disk operating system) and Basic. The email system was PROFS and we had an IRMA board so the PC was emulating an IBM 3270 terminal. (editor's note: an irma board is a brand of coaxial interface card for PCs and Macintosh computers used

to enable 3270 emulator programs to connect to IBM mainframe computers.) Eventually we got our first application which was Lotus 1-2-3. I supported the data communications team that implemented the world's first ever dedicated data network along with BBN (editor's note: BBN stands for Bolt Berinek & Newman, a pioneer in developing computer models of roadway and aircraft noise.) Opportunities have never eluded me. I've worked on two of the largest antitrust suits in the United State's history. Litigation

support from a records manager's standpoint is my specialty. The ability to learn and to grow personally and professionally is what has kept me in our field for the long haul."

Sharon wraps up her interview with the following advice: "In this world of daily technological advances I think it's easy to get overwhelmed or even lost in a world that is moving too fast. My sanity check is to enjoy the things I love most – friends, old cars, classic rock, guitars, my dogs."

ICRM Board of Regents

Chairman

Steven J. Golden, CRM
Apria Healthcare
26220 Enterprise Court
Lake Forest, CA 92630
Tel. 949-639-2831
e-mail: steven.golden@apria.com

President

Debra K. Gearhart, CRM, FAI
286 Charlotte St.
Mulliken, Mi 48861
Tel. 517-649-2237
Cell: 517-282-4185
e-mail: crmfai16@yahoo.com

President-Elect

Juanita Skillman, CRM, FAI
2154 Ronda Granada, Unit N
Laguna Woods, CA 92637
Tel. 562-964-4677
e-mail: juanitaskillman@aol.com

Secretary

Martha W. Adcox, CRM
Delta Air Lines, Inc.
Department 884
1030 Delta Blvd.
Atlanta, GA 30354-1989
Tel. 404-773-1611
e-mail: Martha.adcox@delta.com

Treasurer

Donna Jean G. Vitalie, CRM
AOL Legal Department
22000 AOL Way
Dulles, VA 20166
Tel. 703-265-3007
e-mail: donna.vitalie@teamaol.com

Regent, Examination Development

Donald B. Schewe, CRM, FAI
120 Nails Creek Trail
McDonough Georgia, 30252
Tel. 770-898-5399
e-mail: dschewe@mindspring.com

Regent, Examination Administration

Brice Sample, CRM
State of Michigan
Records Management Services
3400 N. Grand River
Lansing, MI 48909
Tel. 517-335-9450
e-mail: sampleb@michigan.gov

Regent, Regent for PR, Marketing and Professional Development

Rayanne Waggoner, CRM
Apple Inc
1 Infinite Loop MS 38-3R1M
Cupertino, CA 95014.
Tel. 408-974-1503
e-mail: regentcmp@att.net

Regent, Examination Grading

Mary Denker Hilliard, CRM
Advanced Micro Devices
7171 Southwest Parkway, B100.3
Austin, Texas 78735
Tel. 512-602-4702
e-mail: Mary.hilliard@amd.com

Regent, Certification Standards

Virginia A. Jones, CRM, FAI
PO Box 1143
Newport News, VA 23601
Tel. 757-926-1063
Fax: 757-926-1212
e-mail: vjones@nngov.com

Regent, Legislation and Appeals

David McDermott, CRM, FAI
479 W. Two Rivers Dr.
Eagle, ID 83616
Tel. 208-939-9187
e-mail: idahomcd@yahoo.com

Regent-Public Relations and Professional Development

Rae Lynn Haliday, CRM
Saint Louis Zoo
One Government Drive
St Louis, MO 63110
Tel. 314-781-0900, Ext. 4572
e-mail: haliday@stlzoo.org

Mentor Coordinator

Howard Loos, CRM, CDIA
Forensic Services
KPMG LLP, Houston
Tel. 832-335-8411
e-mail: howard.loos@gmail.com

Conference Coordinator

Daniel McGlynn, CRM
32 Constantine Way
Mt. Sinai, NY 11766
Tel. 631-474-5494
e-mail: pdmcmglynn15@hotmail.com

Newsletter Editor

Stephen M. French, MMC, CRM
4200 Dryden Road
Moraine, OH 45439
Tel. 937-535-1005
e-mail: sfrench@moraineoh.org

Code of Ethics

Certified Records Managers® should maintain high professional standards of conduct in the performance of their duties. The Code of Ethics is provided as a guide to professional conduct.

1. Certified Records Managers have a professional responsibility to conduct themselves so that their good faith and integrity shall not be open to question. They will promote the highest possible records management standards.
2. Certified Records Managers shall conform to existing laws and regulations covering the creation, maintenance, and disposition of recorded information, and shall never knowingly be parties to any illegal or improper activities relative thereto.
3. Certified Records Managers shall be prudent in the use of information acquired in the course of their duties. They should protect confidential, proprietary and trade secret information obtained from others and use it only for the purposes approved by the party from whom it was obtained or for the benefit of that party, and not for the personal gain of anyone else.
4. Certified Records Managers shall not accept gifts or gratuities from clients, business associates, or suppliers as inducements to influence any procurements or decisions they may make.
5. Certified Records Managers shall use all reasonable care to obtain factual evidence to support their opinion.
6. Certified Records Managers shall strive for continuing proficiency and effectiveness in their profession and shall contribute to further research, development, and education. It is their professional responsibility to encourage those interested in records management and offer assistance whenever possible to those who enter the profession and to those already in the profession.

Certification Standards

Regent for Certification Standards - ICRM 2011 Processing

As of December 5, 2011, 190 new applications have been received, 174 applications were approved, and 16 are waiting for additional documentation – an approval rate of 94%. Since the new criteria went into effect on August 31, we have seen an increase in applications for 2011, especially online (44 applicants).

Those applicants who were requested to submit additional documentation or verification of work experience during 2011 prior to the change in criteria, and who have not yet done so, are being contacted and their applications reviewed under the new criteria.

Approval Statistics – 10 yr

Year	New Applicants	Approvals (old and new applicants)
2001	103	95
2002	119	107
2003	147	134
2004	202	176
2005	191	124
2006	241	160
2007	156	129
2008	144	134
2009	152	150
2010	180	262
2011 (partial)	190	174

Attention CRMs

Certification Maintenance Cycle: Remember, in order to maintain the CRM designation, you must earn 100 hours every five years. Log onto the ICRM database to keep track of when the cycle ends and your total maintenance points.

Six Month Rule: You must apply for Certification Maintenance within 6 months of the activity.

Examination Schedule 2012

Winter 2012: Parts 1-5, February 6-10, 2012; Part 6, February 16, 2012
Registration Open: November 28, 2011 - February 2, 2012

Spring 2012: Parts 1-5, May 7-11, 2012; Part 6, May 17, 2012
Registration Open: February 24, 2012 - May 3, 2012

Summer 2012: Parts 1-5, August 6-10, 2012; Part 6, August 16, 2012
Registration Open: May 25, 2012 - August 2, 2012

Fall 2012: Parts 1-5, November 5-9, 2012; Part 6, November 15, 2012
Registration Open: August 24, 2012 - November 1, 2012

How to Contact the ICRM

Mailing Address:

ICRM
403 East Taft Rd.
North Syracuse, NY 13212

Phone and Website:

(877) 244-3128
(Toll-free USA and Canada)
Alternate Telephone: (315) 234-1904
Fax: (315) 474-1784
Website: www.ICRM.org
E-mail: admin@icrm.org



Obtain ICRM materials for the most current information on exam preparation

Create a successful path to certification

Have the most up-to-date information

A terrific networking opportunity



ICRM Pre-Approved CMP Activities

Activity Date	Activity	Credit Hours	Sponsor	
1/18/2012	Medical Records Law in Missouri - St. Louis	6	Lorman Education Services	St. Louis
1/20/2012	Medical Records Law in Wyoming - Casper	6	Lorman Education Services	Casper
1/25/2012	WSOD3037 "GARP" for Lawyers: Avoiding Malpractice & Keeping Clients Out of Jail	1	ARMA International	Online
2/2/2012	Medical Records Law in Ohio - Akron	5.5	Lorman Education Services	Akron
2/8/2012	WSOD3040 Transforming Network Shared Drives	1	ARMA International	Online
2/15/2012	Medical Records Law in Utah - Salt Lake	6	Lorman Education Services	Salt Lake City
2/16/2012	Medical Records Law in Washington - Tacoma	6	Lorman Education Services	Tacoma
2/22/2012	WSOD3026 Litigation I: Pre-Litigation Prep	1	ARMA International	Online
3/7/2012	WSOD3027 Litigation II: Legal Holds and Beyond	1	ARMA International	Online
3/9/2012	Medical Records Law in New Hampshire - Manchester	6	Lorman Education Services	Manchester
3/9/2012	Medical Records Law in California - San Diego	6	Lorman Education Services	San Diego
3/14/2012	Medical Records Law in Connecticut - Bridgeport	6	Lorman Education Services	Bridgeport
3/15/2012	Medical Records Law in Ohio - Independence	6	Lorman Education Services	Independence
3/15/2012	From Records Management to Information Governance	5.5	ARMA Utah-Salt Lake	Sandy
3/16/2012	What You Need to Know About Public Records and Open Meetings	6	Lorman Education Services	Kenner
3/19/2012	The AIIM Conference 2012	13	AIIM	San Francisco
3/21/2012	SCIE ARMA Spring Seminar	5	Southern California Inland Empire ARMA Chapter	Ontario
3/21/2012	GWDC ARMA Spring Seminar	5.5	GWDC ARMA Chapter	Washington, DC