



CRM Exam Transition Information for Current Candidates

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Understanding Your Transition

Following the previously announced transition to the Foundations Exam and Capstone Assessment, this guidance explains how the change affects candidates currently progressing through the legacy CRM examination structure. It covers how passed examinations will be recognized, applicable transition credits and fees, options for valid unused registrations, beta participation, assessment availability, and the existing five-year completion period.

Document control notice: This document is uncontrolled when downloaded or printed. Information may change as transition details are finalized. The ICRM website is the authoritative source for the most current information.

Already working toward your CRM?

You will not be required to start over solely because the examination structure is changing. **The progress you have already made will be recognized through the approved transition framework.**

Passed legacy examinations will receive the applicable credits or equivalencies toward Foundations and Capstone, and your existing five-year completion deadline will remain in place. If you also have a valid, unused exam registration, additional options may apply.

The sections below explain how your completed exams will be recognized, what fees may remain, and what options are available as you continue toward certification.

How your passed exams will be recognized.

Your passed legacy examinations will be recognized based on how they relate to the revised examination structure. **Parts 2, 3 and 4 apply to Foundations, while Parts 1 and 5 provide transition credits toward Capstone.**

Use the tables below to identify the treatment that applies to the examinations you have already passed.

Parts 2, 3, and 4 → Foundations

If you have passed...	Transition treatment	Foundations fee
None of Parts 2, 3 or 4	\$0 credit	\$325
One of Parts 2, 3 or 4	\$100 credit	\$225
Two of Parts 2, 3 or 4	\$200 credit	\$125
Parts 2, 3 and 4	Foundations satisfied	\$0

If you have passed Parts 2, 3 and 4, you have satisfied Foundations and do not need to take the Foundations Exam. The Certified Records Analyst credential will be awarded or recognized after verification of all applicable eligibility requirements.

Parts 1 and 5 → Capstone

If you have passed...	Transition treatment	Capstone fee
Neither Part 1 nor Part 5	\$0 credit	\$350
Part 1 or Part 5	\$100 credit	\$250
Parts 1 and 5	\$200 combined credit	\$150

Part 1 and Part 5 credits recognize your completed investment in the legacy examination pathway and reduce the applicable Capstone fee. They do not provide a partial exemption from the Capstone Assessment.

While the legacy examinations remain available, you may continue to take Parts 1, 5, and 6 if you choose. If you pass Part 1 or Part 5, the applicable transition credit will be recognized if you later move to Capstone. If you pass Part 6 before it is retired, you will not need to complete the Capstone Assessment.

Do you have a valid, unused registration?

If you have a valid registration for a legacy exam that you have **not yet taken**, you may have additional options during the transition. These options are separate from any transition credits you receive for exams you have already passed.

Your options depend on the exam part you are registered for. The table below shows whether you may take the exam before the applicable cutoff, request a refund, transfer the amount you paid toward Foundations or Capstone, or convert a Part 6 registration to Capstone.

Review the option that applies to your registration before taking action.

Registration	Available options
Part 1	Refund or transfer the amount actually paid toward Foundations or Capstone, as applicable.
Parts 2, 3 or 4	Take the registered exam before the published cutoff, request a refund, or transfer the amount actually paid toward Foundations.
Part 5	Take the registered exam before the published cutoff, request a refund, or transfer the amount actually paid toward Capstone.
Part 6	Convert the registration to Capstone, subject to any required fee adjustment, or receive an approved refund.

Important: Transferred amounts equal the amount actually paid for a valid, unused registration. Passed-exam credits and transferred registration payments together cannot exceed the fee of the assessment to which they are applied.

Foundations beta

The Foundations beta is expected to launch in November or December 2026 and will provide eligible candidates who have not already satisfied Foundations with the earliest opportunity to satisfy the requirement. Participation is voluntary, and preparation time may be limited.

Beta participants will pay the applicable Foundations initial fee after transition credits are applied. **If you do not pass the beta, you will retain your existing transition status and receive one complimentary attempt at the production Foundations Exam.**

Capstone availability

Because Part 6 is currently administered quarterly, the first Capstone Assessment under the revised examination structure is expected to be offered in Q2 2027. Additional information about registration and the specific administration date will be shared when available.

Your five-year completion period

Your existing deadline remains in place. The transition will not restart or shorten your five-year completion period. ICRM will provide appropriate deadline relief when delayed beta scoring or another ICRM-controlled availability constraint would otherwise disadvantage you.

Key transition dates

The table below provides the current expected timing for key transition milestones. **Specific dates will be added as they are finalized.** Please refer to the ICRM website for the most current information.

Milestone	Date
Legacy exam cutoff	To be announced
Refund and transfer request deadline	To be announced
Foundations beta registration	November/December 2026, specific dates to be announced
Foundations beta administration	Expected November/December 2026
Production Foundations availability	To be announced following completion of beta testing and scoring
Capstone availability	Expected Q2 2027, specific administration date to be announced

Frequently Asked Questions

The transition information above provides the core rules for recognizing your completed exams, determining applicable transition credits and fees, understanding options for valid unused registrations, and maintaining your existing five-year completion period.

The FAQs below provide additional detail on common candidate questions and individual circumstances. Use them if you need more information about how the transition applies to your current progress, fees, unused registrations, the Foundations beta, or a situation that may require individual review.

If your circumstances are not addressed in the published guidance or you believe your examination history is incorrect, candidate-specific assistance is available.

Your current progress

Will my five-year completion deadline change?

No. You will retain the five-year completion deadline assigned under the legacy program. The transition will not restart or shorten your completion period. Passed examinations and approved credits or equivalencies will remain available during that period. ICRM will provide appropriate deadline relief if delayed beta scoring or another ICRM-controlled availability constraint would otherwise disadvantage you.

What happens if I passed Parts 2, 3 and 4?

You have satisfied Foundations and do not need to take the Foundations Exam. The Certified Records Analyst credential will be awarded or recognized after ICRM verifies all applicable eligibility requirements.

Do Part 1 or Part 5 credits exempt me from part of Capstone?

No. These credits recognize your completed investment in the legacy pathway, but they do not create content equivalency or a partial exemption. If you still need Capstone, you must complete the full Capstone Assessment.

Can I continue taking the legacy exams during the transition?

Yes. While the legacy examinations remain available, you may continue to take Parts 1, 5 and 6 if you choose. If you pass Part 1 or Part 5, the applicable transition credit will be recognized if you later move to Capstone. If you pass Part 6 before it is retired, you will not need to complete the Capstone Assessment.

Credits and fees

Do failed examinations generate transition credit?

No. Only passed legacy examinations generate transition credit. A failed attempt does not create credit and does not reduce credit earned from examinations you passed.

Do transition credits have cash value or qualify for a refund?

No. Transition credits have no cash value and are not refundable. They may be applied only as provided in the transition policy and cannot exceed the fee of the assessment to which they apply.

What are the initial Foundations and Capstone fees?

The initial fee is \$325 for Foundations and \$350 for Capstone. Applicable transition credits are applied before the amount due is calculated. The same core fees apply to domestic and international candidates.

What are the revised assessment retake fees?

The full-assessment retake fee is \$175 for Foundations and \$175 for Capstone. A retake fee applies after an unsuccessful attempt at the applicable revised assessment. Legacy transition credits do not reduce retake fees.

How can I determine my total remaining initial fees?

Your remaining initial fees depend on how many of Parts 2, 3 and 4 you passed and whether you passed Part 1 and/or Part 5. Use the Complete Candidate Transition Fee Matrix below to find the scenario that matches your examination history.

Can transferred registration payments be combined with passed-exam credits?

Yes. Approved transferred amounts may be combined with passed-exam credits. Their combined value cannot exceed the fee of the assessment to which they are applied.

Unused registrations

How much will be transferred if I transfer an unused registration?

The transferred amount equals the amount you actually paid for the valid, unused registration.

Can I combine multiple valid, unused registrations with passed-exam credits?

Yes. Approved transferred amounts from multiple valid, unused registrations may be combined with passed-exam credits, subject to the fee cap for the applicable assessment.

What happens if my registration has expired?

An expired registration remains subject to the policy that was in effect when it expired unless ICRM approves an exception.

When will my unused registration be transitioned?

You do not need to submit a request by a specific deadline. Valid, unused legacy exam registrations will be addressed as part of the transition to the revised examination structure when the applicable production assessment is launched. Additional instructions will be provided before the transition takes effect.

Foundations beta

Who may participate in the Foundations beta?

Candidates who have not already satisfied Foundations by passing Parts 2, 3 and 4 are eligible to participate in the Foundations beta, provided they meet all other eligibility requirements. Participation is voluntary, and the beta provides the earliest opportunity for these candidates to satisfy the Foundations requirement.

Candidates who have already passed Parts 2, 3 and 4 have satisfied Foundations and do not need to take the beta. However, if additional participants are needed to support the beta, ICRM may invite candidates in this group to volunteer. Approved volunteers would participate at no charge.

When is the Foundations beta expected?

The Foundations beta is expected in November/December 2026 and is currently being finalized in preparation for administration. Additional information about registration and participation will be shared as details are confirmed.

What will I pay for the beta?

You will pay the applicable Foundations initial fee after transition credits are applied. There is no separate beta discount. The fee is \$325 if you passed none of Parts 2-4, \$225 if you passed one, and \$125 if you passed two.

What happens if I pass the beta?

Foundations is fully satisfied. The beta result receives the same recognition as a production Foundations pass, and no additional Foundations fee is owed.

What happens if I do not pass the beta?

You retain all previously earned transition status and may take the production Foundations Exam when available. **You will receive one complimentary production Foundations retake.**

What happens if my beta result is pending near my completion deadline?

You remain in good standing while scoring is completed. ICRM will extend your completion deadline when necessary to prevent an ICRM-controlled scoring delay from disadvantaging you. No additional fee is charged while the result is pending.

What happens if I withdraw or do not attend?

You do not earn examination credit or a complimentary production retake unless an approved exception applies. Published cancellation and rescheduling rules apply.

Individual circumstances**What if my examination history appears incorrect?**

Candidate-specific assistance is available when ICRM records are disputed. ICRM will verify its records before any credit, equivalency, refund, transfer or credential is finalized.

What if my situation is not addressed in the published guidance?

You may request candidate-specific assistance when the published guidance does not clearly address your circumstances or when an administrative exception requires review.

What if I passed Parts 2, 3 and 4 but did not formally declare the CRA credential?

You may receive the Certified Records Analyst credential after ICRM verifies that you meet the applicable eligibility requirements.

Complete Candidate Transition Fee Matrix

The table below shows how your passed legacy exams affect your remaining initial fees for Foundations and Capstone.

Find the row that matches the exams you have already passed to see your remaining Foundations fee, Capstone fee, and combined total after applicable transition credits.

Have an unused registration? The fees shown below are based on exams you have already passed. If you also have a valid, unused exam registration, your \$100 registration payment is managed separately and may further reduce the amount you need to pay, depending on the transition option that applies.

Parts 2-4 passed	Part 1	Part 5	Foundations	Capstone	Total remaining
None	No	No	\$325	\$350	\$675
None	Yes	No	\$325	\$250	\$575
None	No	Yes	\$325	\$250	\$575
None	Yes	Yes	\$325	\$150	\$475
1 of 3	No	No	\$225	\$350	\$575
1 of 3	Yes	No	\$225	\$250	\$475
1 of 3	No	Yes	\$225	\$250	\$475
1 of 3	Yes	Yes	\$225	\$150	\$375
2 of 3	No	No	\$125	\$350	\$475
2 of 3	Yes	No	\$125	\$250	\$375
2 of 3	No	Yes	\$125	\$250	\$375
2 of 3	Yes	Yes	\$125	\$150	\$275
All 3	No	No	Satisfied	\$350	\$350
All 3	Yes	No	Satisfied	\$250	\$250
All 3	No	Yes	Satisfied	\$250	\$250
All 3	Yes	Yes	Satisfied	\$150	\$150

“Satisfied” means Parts 2, 3 and 4 have been passed and no Foundations fee is owed. The same core fees apply to domestic and international candidates.