CERTIFICATION CANDIDATE HANDBOOK

The Essential Guide to Inform USA Certification

Published: May 2024

Table of Contents

INTRODUCTION

The Inform USA Certification Program is the premiere professional credentialing program in the Information and Referral (I&R) sector of human services. The certification program is based on established standards for the I&R field. The program identifies specific competencies and related performance criteria, which describe the knowledge, skills and work-related tasks needed by I&R practitioners to successfully execute their duties. Certification is attained through the successful completion of a proctored examination. Exams are developed and updated using a psychometric based process.

VALUE OF CERTIFICATION

Certified professionals help minimize risks, enhance consumer protection, and improve public safety. Moreover, certifications make it easier for employers and others to spot individuals with the right skills for the job.

Certificate holders benefit from:

- Increased recognition by peers and respect from colleagues
- Improved opportunities for employability and advancement
- Greater confidence in their professional competence
- Increased professional trust from employers or the public.
- Increased autonomy in the workplace
- Better compensation and career longevity

Agencies who employ Certified individuals benefit from:

- Qualified individuals for employment or advancement
- Continued and enhanced staff competence
- Commitment to public safety and/or consumer protection
- Reduced employee turnover and increased job satisfaction
- Justification for potential compensation differential
- Ability to pursue agency Accreditation through Inform USA

Communities benefit from:

- Objective, independent, third-party evaluation and assessment of professional competence
- Commitment to public safety and/or consumer protection
- Accountability through ethical conduct standards

PURPOSE AND SCOPE

Inform USA Certification holders have demonstrated proficiency in the field of Information and Referral (I&R), encompassing a broad spectrum of competencies essential for effective practice.

Certified professionals may specialize in particular roles or functions within their daily activities, yet they maintain a comprehensive understanding across all essential aspects of I&R. This broad knowledge equips them to effectively navigate the complexities of I&R operations and recognize the interplay between various functions within the field.

CERTIFICATIONS OFFERED

Community Resource Specialist (CRS) This is designed for practitioners who work directly with clients whether on the phone or in person and provide mediated information and referral.

Community Resource Specialist - Aging/Disabilities (CRS-A/D) This is designed for practitioners who work directly with clients and caregivers within the aging and/or disabilities area and perform the same basic range of skills and tasks as a comprehensive information and referral specialist.

Community Resource Specialist - Database Curator (CRS - DC) This is designed for practitioners who maintain databases of resources for the communities they serve.

ELIGIBILITY REQUIREMENTS

Eligibility is based on I&R and equivalent experience combined with educational background. I&R practitioners are eligible for initial certification only for the jobs they currently perform or directly supervise (i.e. you can only take the examination if you are currently employed in either a CRS, CRS-A/D or CRS-DC role) Certification can be maintained when working on a freelance basis or between and after employment.

To take the exam, individuals are required to meet the following eligibility criteria outlined in the following chart:

Education		Years of Full-Time Employment		Volunteer or Part-Time Hours
Bachelor's Degree or Higher	AND	1	OR	1,000
Associates or Community College	AND	2	OR	2000
High School Diploma/GED	AND	3	OR	3000
No requirements	AND	4	OR	4000

TESTING OPTIONS

We offer flexible testing options to accommodate the diverse needs and preferences of our certification candidates. The following testing options are designed to ensure the fairness, security, and reliability of the certification assessment process. Candidates can select the option that aligns with their preferences and logistical considerations, allowing them to pursue certification in a manner that best fits their needs.

ONLINE EXAMS

Candidates have the option of taking exams remotely online anytime throughout the year via our online proctoring partner, Examity. This option allows individuals to complete their certification assessment from the comfort of their home or workplace. Remote online exams are conducted with the assistance of a remote proctor who monitors the examination session via webcam. This ensures the integrity and security of the testing process while providing candidates with the flexibility to choose a time and location that best suits their schedule.

Prior your exam date, please be sure to:

- Check your computer system readiness through the Examity System Check
- Make sure that you have Zoom installed on your computer.
- Have your government issued photo ID ready. You will be required to show a photo ID to the proctor via webcam.

During your online exam, you will be expected to comply with these standard rules:

- Must be alone in room

- Clear Desk and Area
- A physical (non-electronic) dictionary may be used to look up a word if needed.
- Have computer connected to a power source
- No phones or headphones
- No dual monitors
- No leaving your seat
- No talking
- Webcam, speakers, and microphone must remain on throughout the test.
- The proctor must be able to see you for the duration of the test.

The Examity privacy and security details are available at https://www.examity.com/features/privacy-and-security/.

ON-SITE EXAMS

For candidates who prefer a traditional testing environment, we also offer on-site exams with a proctor present in the room. These exams are conducted at designated testing locations or other approved facilities. While on-site exams require candidates to travel to a specific location, they provide a structured and controlled testing environment that some individuals may prefer. The current list of exams sites is available here. Seating for in-person exams may be limited. Applications will be processed on a first come, first served basis.

SUBMITTING AN APPLICATION

To begin the certification process, candidates are required to submit their applications online through our website here. Applications must be submitted at least 30 days prior to the requested exam date. This timeframe allows for adequate processing and review of the application, as well as scheduling of the examination. It is essential to ensure that all required documentation and information are provided accurately and completely. Incomplete application submissions and can cause delays with testing. Exams need to be taken within one year of registering.

If you are Canadian, there is a separate Canadian cost structure and application process detailed within the package provided by InformCanada.

CERTIFICATION FEES

The fees for certification exams vary depending on the membership level. Exam registration fees are not refundable.

Online Exams

Member Type	Cost
Platinum	$125
Gold, Silver, Individual	$150
Non-member	$300

On-site Exams

Member Type	Cost
Platinum	$95
Gold, Silver, Individual	$115
Non-member	$300

Exam Retakes

Exams can be taken at a reduced rate up to 12 months after the initial exam attempt. The exam retake registration fee is $90 for all member levels, $130 for non-members. There is not a limit on the number of times an exam can be retaken.

Questions regarding group payment or other questions regarding payment submission should be directed to certification@informusa.org.

TESTING ACCOMODATIONS

Inform USA complies with the Americans with Disabilities Act (ADA) and other applicable legislation by offering candidates the opportunity to request exam accommodations. Common accommodation requests include using screen-reading software, extended exam time limits, and approval to read questions aloud while taking an exam. Please let us know if you have any exam accommodation requests by completing this form, and we will review and inform the proctor of the approved accommodation.

PREPARING FOR AN EXAM

Examinations are based on the following materials, along with real-world Information and Referral (I&R) experience. While a seasoned Information and Referral professional should ideally perform well without further study, reviewing these materials alongside professional experience serves as an effective preparation method for certification examinations. Study suggestions are also available on our website here.

STUDY RESOURCES FOR ALL CANDIDATES

- Inform USA Standards and Quality Indicators for Professional Information & Referral
  The Inform USA Standards address all aspects of an I&R operation including service delivery, resource database, reports and measures, cooperative relationships, disaster/emergency preparedness and organizational effectiveness.

- The I&R Training Manual
  Candidates should primarily focus on the sections and volumes that pertain directly to their job:

    - CRS and CRS - A/D: Service Delivery sections, especially the first 6 sections of Volume 2.

    - CRS - A/D candidates should also review the sections on Serving Older Adults and Serving People with Disabilities.

    - CRS - DC: Resource Database sections, Volume 3.

- Job Task Analysis
  A job task analysis involves systematically identifying and documenting the tasks, duties, responsibilities, and skills essential for effectively performing a specific job role, such as that of a Community Resource Specialist. This analysis serves as the blueprint for the exam, ensuring that the content remains relevant and accurate. It is highly recommended for exam candidates to prioritize reviewing the job task analysis provided in this handbook for the certification exam they're preparing to take. Click the link below to review the job task analysis for the exam you are preparing for.

  CRS Job Task Analysis
  CRS-A/D Job Task Analysis
  CRS-DC Job Task Analysis

- Online Training
  Certification preparation packages and practice exams available here. These resources are available to help anyone preparing to take a certification exam by reviewing the portions of the training manual and standards that a certification exam is based on. Completion of these courses do not guarantee a passing score on the exam; these resources are available for study purposes only.

- Inform USA Ethical Principles
  These Ethical Principles are intended to serve as a guide to the everyday professional conduct of Community Resource Specialists in the provision of Information and Referral (I&R).

GENERAL INFORMATION

- A useful resource on dealing with test anxiety and other tips is available here.

- Candidates may encounter questions where more than one choice seems plausible. Questions may present scenarios that an I&R specialist could typically encounter. These questions are designed to mirror real-world I&R work experiences, which frequently involve navigating through situations with multiple potential solutions. It is important to apply principles effectively in addition to recalling facts.

- It is recommended to not spend too much time on any single exam question. You will have the option to flag a question which you can revisit prior to submitting.

- You will have two-hours and 10 minutes to take the exam. Results will be emailed within 10 business days of testing.

- Certification exams consist of 100 multiple-choice questions, covering the domains, or topic areas outlined in the job task analysis sections below. Exams can include up to 10 additional unscored questions that are used for statistical analysis in accordance with credentialing industry standards, and do not impact the results of your exam.

- The passing score is determined through a thorough statistical analysis process, ensuring the fairness and reliability of the evaluation. While specific passing scores aren't disclosed, a coaching report will be provided if you don't pass an exam. This report details performance within each of the exam domains outlined in the job task analysis and is designed to show candidates which specific content areas have the most room for improvement.

CRS Study Resources

CRS Job Task Analysis

The weight column indicates how many scored exam questions appear within each domain. For instance, with 100 questions total, a weight of 15% corresponds to 15 questions from that domain.

Domain	**Tasks**	**Weight**
Rapport	Establish and maintain rapport throughout the contact by appropriately welcoming, engaging, and actively listening to the client and responding in a manner and tone appropriate to the situation.	15%
Assessment	Determine the client's need/problem (i.e., the problem/need), its disposition (e.g., information provision, assessment and referral, crisis), and the emotional state of the client. Determine any actions previously taken, or assistance previously received, to refine the list of possible resources, and the assistance that may be needed. Evaluate the client's resources (e.g., personal, family, financial), strengths, limitations, potential barriers (e.g., disabilities, language, transportation, communication skills), preferences, and coping skills (i.e., ability to effectively act on referrals) in order to facilitate empowerment and determine the need for additional assistance and advocacy. Review, clarify, and confirm the assessment information with the client and make adjustments as necessary.	20%
Identification of Available	Work with the client to prioritize needs and identify appropriate available resources based on the previous evaluation of personal strengths, available resources, and preferences.	20%

Resources and Preferences	Work with the client and engage in problem-solving to address situations where there are no available services/resources or where they are insufficient.	
Information, Referral, Empowerment and Advocacy	Describe the available options to the client. Determine possible barriers and the level of assistance and advocacy needed to help the client act on the selected options. Provide coaching and resource-specific information to the client to maximize their effectiveness in obtaining assistance and services. Close the interaction by summarizing referrals and clarify that the client does not require any additional information or referrals.	20%
Documentation	Complete the record of the contact and if necessary, document any required demographic information in addition to outcomes, client notes, follow-up notes, unmet needs, etc.	10%
Follow-up	Provide I&R service before, during and following a disaster or other emergency, with the skills to respond effectively to people in crisis, remain flexible in a rapidly changing environment, and work under adverse conditions. This includes an understanding of the emergency response service delivery system, and the types of services people typically need in disasters, emergencies and crises.	5%
Disasters, Emergencies and Crises	Provide I&R service before, during and following a disaster or other emergency, with the skills to respond effectively to people in crisis, remain flexible in a rapidly changing environment, and work under adverse conditions. This includes an understanding of the emergency response service delivery system, and the types of services people typically need in disasters, emergencies and crises.	5%
Ethics, Professional, and Legal Issues	Provide services in a manner consistent with the Inform USA Standards and Quality Indicators for Professional Information and Referral. Follow the requirements of mandatory reporting laws and ethical responsibilities (e.g., child and elder abuse, domestic violence, suicidal/homicidal ideation, human trafficking), and other legal and ethical requirements (e.g., privacy legislation, client confidentiality, conflict of interest). Engage in professional development activities to continuously improve knowledge and skills, and therefore the quality of the service. Maintain a high level of self-awareness and effectively respond to stress and its effects through self-care and mutual support.	5%

Online Training

- CRS Certification Preparation Package. This package is designed to help anyone preparing to take the CRS Certification test by reviewing portions of the training manual and standards that the certification test is based on.

- A CRS Practice Test is available as a module of our online training. This practice exam for Inform USA Certification as a Community Resource Specialist (CRS) consists of 50 questions while the full exam contains 100 questions. The questions are in the same format and weighted in the same proportion in subject area as the full exam. Success in the practice exam does not guarantee success in the full exam, but it will provide you with some realistic preparation for the actual experience.

- CRS Assessment – Job Domains, Tasks, Skills and Knowledge Evaluation This FREE self-assessment evaluates current understanding of the domains, tasks, skills, and knowledge in the eight domains covered in the Community Resource Specialist certification test. There are 10 questions in each domain, and you must get 80% correct in each area to pass.
  Upon completion, Inform USA Learn will suggest other Inform USA courses that will strengthen your knowledge in areas where you did not meet the minimum expectations in the assessment.

CRS-A/D Study Resources

CRS-A/D Job Task Analysis

The weight column indicates how many scored exam questions appear within each domain. For instance, with 100 questions total, a weight of 18% corresponds to 18 questions from that domain.

Domain	**Tasks**	**Weight**
Rapport	Establish and maintain rapport with clients and community partners by welcoming them according to their preferred mode, level, and style of communication, explaining your role as a Community Resource Specialist, actively listening, and responding in a manner and tone appropriate to the situation.	18%
Screening and Assessment	Determine the nature of the call (e.g., information provision, information and referral/assistance, eligibility screening, crisis), problem/need(s), and the emotional state of the client. Explain the need for and obtain demographic and other information relevant to the client's situation and presenting problem. Determine the need for additional information gathering and service provision (e.g. home visit, evidence-based risk screening, Options Counseling).	18%

	Determine the actions previously taken, if any, assistance previously received, and the results of the actions and assistance in order to refine the list of possible resources and the assistance that may be needed. Explore, when appropriate, to see if there is a more serious underlying or unstated problem (including in those situations where an individual is requesting some specific information without identifying a need). Evaluate the client's resources (e.g., personal, family, financial, technological), strengths, goals, potential barriers, preferences, and ability to effectively act on referrals in order to facilitate self-advocacy and determine the need for additional assistance and advocacy. Review, clarify, and confirm the assessment information with the client and make changes as necessary	
Identification of Available Resources and Preferences	Work with the client to prioritize needs and goals, and identify appropriate available resources based on the previous evaluation of personal strengths, resources, and preferences. Work with the client and engage in problem solving to address situations where there are no available services/resources, where they are insufficient or where there are long wait lists.	18%
Information, Assistance, Referral and Advocacy	Describe and explain to the client the available options and their associated requirements and responsibilities in terms of the client's priorities, goals, and preferences. Determine the level of assistance and advocacy needed in order to help the client act on the selected options. This may involve assessing the client's resources and capacity to use technology in order to help determine the level of assistance and advocacy needed for the client to access needed and preferred services. Obtain client agreement on roles, permission to assist and advocate as needed, release of information if required, etc. in order to permit action on selected options. Implement assistance and advocacy decisions in collaboration with the client, family, caregivers, providers, etc. in order to obtain needed and preferred services. Complete the contact by reviewing and summarizing with the client the information given, options selected, action plan, and follow-up plans, if applicable. (The continuation of the original rapport should	18%

	ensure the client will re-contact your service if future help is required.)	
Documentation	Complete the record of the current contact, and contacts made on behalf of the client by obtaining additional information, if necessary, and documenting assessment and demographic information, and any required outcomes, client notes, follow-up notes, etc.	11%
Follow-up	Contact the client as appropriate and with their consent to determine current status of situation, if needs were met, if the referrals were contacted and proved appropriate, and/or if additional assistance and referral is required (i.e., what happened, what didn't happen, what changed, if needs still remain, if new needs have arisen, and agreed upon next steps).	5%
Disasters and Emergencies	Provide I&R service before, during, and following a disaster or other emergency, with the skills to respond effectively to people in crisis and remain flexible in a rapidly changing environment. This includes an understanding of the emergency response service delivery system, and the types of services needed for the populations served (i.e., older adults, people with disabilities, caregivers) in disasters, emergencies, and crises. Implement assistance and advocacy decisions in collaboration with the client, family, caregivers, providers, emergency response services, etc. in order to obtain needed and disaster related services.	7%
Ethics, Professional, and Legal Issues	Community Resource Specialists - Aging/Disabilities provide services in a manner consistent with the Inform USA Standards and Quality Indicators for Professional Information and Referral, with Inform USA Ethical Principles for Community Resource Specialists, and with key federal and state legislation authorizing programs and protections for clients served (e.g. including but not limited to, the Older Americans Act, the Rehabilitation Act, the Americans with Disabilities Act, and the Olmstead Decision). Community Resource Specialists - Aging/Disabilities follow the requirements of mandatory reporting laws and ethical responsibilities (e.g., elder and child abuse, abuse of adults with disabilities, domestic violence, suicidal/homicidal ideation), and other legal and ethical requirements and responsibilities (e.g., privacy legislation, client confidentiality, conflict of interest, surrogate decision making, client self-determination, ADA). Community Resource Specialists - Aging/Disabilities engage in professional development activities to continuously improve the quality of the services they provide. Community Resource Specialists - Aging/Disabilities maintain a high level of self-awareness, understand stress and its potential effects	5%

	on serving clients as well as tools and resources to respond to internal and external stressors.	

Online Training

- There is a free training course entitled "Certification for CRS-A/D Training" and is available on the ADvancing States iQ website here If you are new to ADvancing States iQ, you must create a new account.

- A CRS-A/D Practice Test is available as a module of our online training. This practice exam consists of 50 questions while the full exam contains 100 questions. The questions are in the same format and weighted in the same proportion in subject area as the full exam. Success in the practice exam does not guarantee success in the full exam, but it will provide you with some realistic preparation for the actual experience.

- History of Older Americans Act: The passage of the Older Americans Act (OAA) in 1965 affirmed the nation's highest sense of commitment to the well-being of older persons. In 1973, amendments to the Older Americans Act required State and Area Agencies on Aging to develop and maintain I&R services within "reasonably convenient access to all older Americans."

CRS-DC Study Resources

CRS-DC Job Task Analysis

The weight column indicates how many scored exam questions appear within each domain. For instance, with 100 questions total, a weight of 15% corresponds to 15 questions from that domain.

Domain	Tasks	Weight
Database Development	Research, develop and regularly review the inclusion/exclusion criteria of the resource database. Obtain initial information through community outreach, website application and other methods, on those human service organizations that may meet resource database inclusion criteria to ensure the database continues to meet community needs. Establish contact with and obtain detailed information about the programs and services provided by human service organizations.	15%

Database Maintenance	Conduct an annual update of all records within the resource database using a variety of methods. Prioritize records for special attention based on their importance to vulnerable people and the number of referrals and web visits generated. Enter new and revised resource database information in compliance with an internal style guide, then review, edit, and proof information to ensure clarity, conciseness and accuracy. Index according to classification system rules for internal consistency and hierarchical levels. Establish mechanisms for gathering information about interim changes throughout the year. Adjust quickly and responsibly to disaster situations.	35%
Technology and Data Dissemination	Collaborate with vendors, users, stakeholders, and other I&R programs to optimize the internal maintenance and external searchability of the resource database across the Internet and other systems. Engage in projects that establish and disseminate print and online database portals to facilitate options that further the access to information, and to ensure those options are maintained.	12%
Quality Assurance	Review and evaluate database records at least annually for adherence to the style guide and inclusion/exclusion criteria, appropriate application of the classification system indexing, completeness of data elements including additions and updates, and overall accuracy.	18%
Reporting and Analysis	Organize, extract and analyze information from the database for reporting purposes (e.g. community needs, agency referrals, metadata, mapping of services). This role often involves being the liaison with programmers. Prepare and review reports to determine the impact of the database, specialized publications, directories, guides, etc.	10%
Training and User Support	Train and support database users (e.g. community resource specialists, other internal staff, funders, human service agencies, the public) to accurately retrieve information from the database. Train and support staff from human service organizations to effectively submit new information and to update existing information on their agency profiles.	6%

Professional Issues, Ethics and Development	Practice their profession in a manner consistent with the Inform USA Ethical Principles for Community Resource Specialists. Engage in professional development activities to continuously improve knowledge and skills, and therefore the quality of the service. Maintain a high level of self-awareness and effectively manage priorities and respond to stress and its effects through self-care and mutual support.	4%

Online Training

- CRS-DC Certification Preparation Package. Review the skills and knowledge you will be tested on during the CRS-DC exam.

- A CRS-DC Practice Test is available as a module of our online training. This practice exam consists of 50 questions, while the full exam contains 100 questions. The questions are in the same format and weighted in the same proportion in subject area as the full exam. Success in the practice exam does not guarantee success in the full exam, but it will provide you with some realistic preparation for the actual experience.

- Indexing with Taxonomy: A practical guide written by Margaret Bruni of The Detroit Public Library's TIP Service, originally published in Information & Referral: The Journal of the Alliance of Information and Referral Systems.

- Taxonomy Supplements: How to Keep Taxonomy Updated for Your Resource File: A practical guide written by Georgia Sales of INFO LINE of Los Angeles, originally published in Information & Referral: The Journal of the Alliance of Information and Referral Systems.

- Setting Inclusion/Exclusion Criteria: Determining the Scope of a Resource File: A series of considerations (with sample policies) written by Dick Manikowski, originally published in Information & Referral: The Journal of the Alliance of Information and Referral Systems.

MAINTAINING CERTIFICATION

Certification is valid for two years starting from the date an exam is successfully completed. Retesting is unnecessary unless you allow your certification to lapse beyond its expiration date.

To recertify, certification holders are required to document at least 10 training hours over the two-year certification period. There are a wide variety of courses that can be used to meet the recertification requirements at https://learn.informusa.org/. For any courses completed through the Inform USA Learn site, a summary of the training hour details can be downloaded through your account dashboard. Acceptable training includes workshops, conferences, webinars, or specialized courses aimed at enhancing proficiency in I&R services.

CODE OF ETHICS

All certified professionals are expected to adhere to the Inform USA Code of Ethics, which outlines the ethical principles and standards of conduct for individuals working in the information and referral field. The Code of Ethics promotes integrity, confidentiality, impartiality, and respect for the rights and dignity of clients.

USE OF THE CREDENTIAL

Upon successfully obtaining Inform USA Certification, certified professionals are authorized to use the designated credential (e.g., Certified Information and Referral Specialist, or CRS) on their professional materials, such as business cards, resumes, email signatures, and social media profiles. The use of the credential signifies the individual's commitment to excellence, professionalism, and adherence to established standards in the field of information and referral services.

A digital badge and printable certificate are available once you pass an exam. There is an overview of how to access them in your account at https://www.informusa.org/digital-badge. We strongly encourage using this new way to promote your professional qualifications and the quality commitment of your organization.

Certification holders are encouraged to promote their certification status to colleagues, employers, and clients as a mark of distinction and competency in the field. However, it is important to use the credential accurately and ethically, avoiding misrepresentation or misuse of the certification designation.

By maintaining the integrity and standards of the certification program, certified professionals contribute to the overall credibility and recognition of the Inform USA Certification within the information and referral community.

VERIFYING CERTIFICATION STATUS

The Inform USA Certification program maintains a directory of certification holders, which is available here.   Certification holders can access their profile in the Member Compass section of our website, where individual certification details can be viewed.

Inform USA will respond to any inquiry as to whether a particular individual is currently certified, and the nature of the certification held. Inform USA reserves the right to publish an individual's name along with their organization, city and state/province, unless an individual provides written confirmation of their preference to withhold their name from publication. Please let us know if you prefer to not be included on this list.

QUESTIONS?

Additional questions not addressed within this handbook should be directed to Inform USA staff at certification@informusa.org