

CMRTA



CERTIFIED REVENUE OFFICER PROGRAM

Initial Certification Process

What is the CRO Program?



The CRO (Certified Revenue Officer) Program was created by the CMRTA Certification Committee to provide a means to measure the attainment of a certain level of knowledge and experience in the revenue collection profession.

Why Become a CRO?



Certification attests to your acquired training in:

- **Business License Tax**
- **Collections**
- **Laws and Regulations**
- **Management Theory/Customer Service**
- **Revenue Sources Other Than Business Licenses**
- **General Information and Useful Resources**

It's a great way to receive recognition as an experienced professional in your field.

Certification attests to your knowledge on current issues.

It's a valuable credential for job and promotional opportunities

Where Do I Start?



The first step is determining if you meet the minimum requirements to take the CRO exam, and confirming your CMRTA membership status is current.

Revenue Experience Requirement



- 4,000 hours of business license (tax) experience is required.
- Business license experience may include processing applications, field enforcement, audits or other business license related experience.

4,000 hours is the equivalent of 2 years.

CMRTA Training Requirement

Completion of at least 30 hours of CMRTA training in specific categories.

- Refer to the “Training Category” information
- This list also serves as a **Category “Key”** which tells you what the letters on your conference agendas represent
- You may also see these “Category Keys” on your Division meeting agendas

TRAINING CATEGORIES

	KEY	MIN HOURS	MAX HOURS
Business Tax Skills	“B”	6 hours	10 hours
Collection Skills	“C”	2 hours	6 hours
Laws and Regulations	“L”	4 hours	10 hours
Management Theory & Skills	“M”	3 hours	5 hours
CMRTA Information	“I”	2 hours	2 hours
General Information & Skills	“G”	3 hours	7 hours
Revenue Sources other than Bus. Licenses	“H”	2 hours	6 hours
Attendance at CMRTA meetings	“A”		4 hours

THIRTY (30) CMRTA CLASS HOURS REQUIRED FOR INITIAL CERTIFICATION

Note the minimum and maximum hours above.

FIFTY (50) CMRTA CLASS HOURS REQUIRED FOR RECERTIFICATION

Note there are **no** minimum or maximum hourly requirements for **Recertification**. The training must pertain to the CRO Categories. For example, you may document 20 hours of training in Business Tax Skills and 30 hours of training in Laws and Regulations to fulfill the 50 hour training requirement.

In 2012, the CRO Program was changed to allow up to 20% of training from other sources (6 hour max on training for initial certification; 10 hours max for recertification).

However, the training must pertain to the CRO Categories above, and **must be approved by the Certification Committee beforehand**.

Where Do I Get An Application?

- Go to www.cmrrta.org and log in
- Select “CRO Program/Awards”
- Select “CRO Program”
- Select “CRO Downloadable Forms”
- Download the forms you need



The screenshot shows the website for the California Municipal Revenue & Tax Association (CMRTA). The header features the CMRTA logo and navigation links for Login, Join CMRTA, and Contact Us. A sidebar menu on the left lists various site sections, with 'CRO Program / Awards' highlighted. The main content area is titled 'CRO Program / Awards' and contains a paragraph explaining the association's recognition programs, followed by a bulleted list of available forms.

CMRTA
California Municipal Revenue & Tax Association

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Home Page
About CMRTA
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Divisions
Associate Member and Agency Links
Calendar / Registration
Annual Conference / State Board Meetings
CRO Program / Awards
• Certification Representatives
• CRO Program
• Bruno Marchetti Award

CRO Program / Awards

The California Municipal Revenue and Taxation Association acknowledges the outstanding achievements of its members through awards and certification programs. The recipients of these awards and those who are certified are recognized as the top professionals in the municipal revenue field. Once a year, the organization awards the Bruno Marchetti Award and the Lighthouse Award for Excellence at the Annual Conference. Those members who have gained considerable experience working in the municipal revenue field qualify to become a Certified Revenue Officer.

- **Certification Representatives**
- **CRO Program**
- **Bruno Marchetti Award**
- **Lighthouse Award**
- **Al D. Capuchino Merit Scholarship**

Required Forms For Initial Certification

“New” applicants need to submit the following forms:

- **Application for Certification**

This is the 'Application for Certification' form from the California Municipal Revenue & Tax Association. It includes fields for applicant name, address, and phone number. It also contains a section for 'Qualifying Experience' with a list of activities and a section for 'Department of origin' with fields for name, title, and address.

- **Application for Examination**

This is the 'Application for Examination' form. It includes fields for applicant name, address, and phone number. It also contains a section for 'Scores' with a table for recording scores for various subjects.

- **CMRTA Record of Certification of Training (work on this one 1st)**

This is the 'CMRTA Record of Certification of Training - Attended' form. It is a table with columns for 'Date', 'Topic', 'Hours', and 'Score'. It is divided into sections for 'Business Tax Skills', 'Collection Skills', and 'Law & Regulations'.

This is the 'CMRTA Record of Certification of Training - Management Team & Staff' form. It is a table with columns for 'Date', 'Topic', 'Hours', and 'Score'. It is divided into sections for 'Management Team & Staff', 'CMRTA Subscribers', 'General Subscribers & Staff', 'Sanctioned Non-Other Than Business Learning', and 'Distance Learning/Blended Learning/Online/On-Demand'.

This is the 'CMRTA Record of Certification of Training - Attendance at CMRTA Meetings' form. It is a table with columns for 'Date', 'Topic', 'Hours', and 'Score'. It is divided into sections for 'Attendance at CMRTA Meetings' and 'Attendance at CMRTA (Other than CMRTA) Meetings'.

Application For Certification

This document certifies that you have met the 4,000 hours of qualifying experience.



CALIFORNIA MUNICIPAL REVENUE & TAX ASSOCIATION

APPLICATION FOR CERTIFICATION

Applicant's name: _____
Please PRINT as it will appear on certificate

Jurisdiction / city: _____ Division _____

Day time telephone number: _____ e-mail _____

Your check made payable to California Municipal Revenue & Tax Association in the amount of \$35.00 for the application fee must be included.

DOCUMENTATION OF EXPERIENCE

QUALIFYING EXPERIENCE INCLUDES 4000 hours (approximately 2 years) in one or more of the following areas of job experience:

1. Processing of business tax applications, renewals and billing.
2. Performing business tax, TOI, or other city related audits.
3. Performing collection activities related to business licenses, utility or user tax.
4. Field enforcement of a business tax ordinance.
5. Supervision of business tax functions, audits, collections etc as noted above.

Name of person signing documentation of experience: (PRINT) _____

Position / title _____

Phone number _____ e-mail _____

Experience of applicant:

DATE FROM	DATE TO	DUTIES / EXPERIENCE	HOURS
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

I certify that the applicant has received the qualifying experience while working at the city named here.


Signature _____

Date _____

CRO Application for Examination



Simply fill out the top portion on this application.

 **CALIFORNIA MUNICIPAL REVENUE & TAX ASSOCIATION**
CRO APPLICATION FOR EXAMINATION

EXAM: **A B C D** RETURN EXAM BY: _____

To request a CMRTA Examination please complete the following and submit as requested. The examination fee of \$25.00 must be enclosed with the application.

Candidate's Name: _____
(Please print clearly)

Mailing Address: _____
Street Apartment Number

_____ City State Zip

FOR CERTIFICATION COMMITTEE USE ONLY

Date request received: _____

Date exam mailed: _____

Date exam **MUST** be returned by: _____

Date completed exam returned: _____

Extension granted: To _____ Reason: _____

SCORING

Area 1 (T or F, Multiple Choice):	_____
Area 2 (Short Essay):	_____
Area 3 (Major Essay):	_____
Penalty for late return: -	_____
TOTAL SCORE:	_____

Pass Fail Candidate Notified: Yes No Date: _____

Major Essay Question: _____

(Revised 01/2013)

CMRTA Record of Certification Training Attended



CMRTA RECORD OF CERTIFICATION TRAINING ATTENDED

NAME	KEY

1 Business Tax Skills Certification: 6 hours minimum, 10 hours maximum

Date	Location	Title	Credit

2 Collection Skills Certification: 2 hours minimum, 6 hours maximum

Date	Location	Title	Credit

3 Laws & Regulations Certification: 4 hours minimum, 10 hours maximum

Date	Location	Title	Credit

4 Management Theory & Skills Certification: 3 hours minimum, 5 hours maximum

Date	Location	Title	Credit

5 CMRTA Information Certification: 2 hours minimum, 2 hours maximum

Date	Location	Title	Credit

6 General Information & Skills Certification: 3 hours minimum, 7 hours maximum

Date	Location	Title	Credit

7 Revenue Sources Other Than Business Licensing Certification: 2 hours minimum, 6 hours maximum

Date	Location	Title	Credit

8 Evaluation Creating Amending Business License Ordinances Certification: 1 hour Minimum, 3 hours maximum

Date	Location	Title	Credit

9 Amending at CMRTA Meetings Certification: 4 hours maximum

Date	Location	Title	Credit

10 Teaching a CMRTA Class (Optional Category) Classes with CEO Class - Can be up to 3 Total Class Times

Date	Location	Title	Credit

(Revised 10/2013)

CMRTA Training Information

Training should be acquired through CMRTA:

- Meetings
- Conferences
- CMRTA DVD Library

Most CMRTA training represents **one** hour of training.

The following sessions **do not** qualify as training:

- General Session
- Technology Update
- General Business at Quarterly Meetings
- Exchange of Expertise at Quarterly Meetings

Teaching a class is optional

A class may fulfill more than 1 category, however it may only be used once.

Outside training can fulfill some hours, **however:**

- Outside training is limited to 6 hours for *Initial Certification*; 10 hours for *Re-certification*
- Class must be relevant to the CRO categories
- Class must be reviewed and approved by the Certification Committee **beforehand**

Save your agendas! Pencil in your classes as you complete attendance.

Refer to the CRO List of Categories.

Some Division agendas are already categorized for you.

Submit Your Application



Mail the completed forms, application fee and exam fee to your CRO Division Representative

- **Certification application fee - \$35**
- **Examination fee - \$25**
- **Checks should be made payable to CMRTA.**

Current CRO Division Representatives

Division I and II

Desiri Vink, CRO

Administrative Services Department

City of Emeryville

1333 Park Avenue

Emeryville, CA 94608-3304

Phone: 510-596-4325

FAX: 510-658-8095

Email: dvink@Emeryville.org

Division III

Maria Ibarra Villaseñor, CRO Chair

City of Commerce

2535 Commerce Way

Commerce, CA 90040

Division IV

Dixie Keshavarzi, CRO

City of San Diego

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(6 19) 6 15-1500

dkeshavarzi@sandiego.gov

(323) 722-4805, Ext. 2327

mariai@ci.commerce.ca.us

Exam Information



The exam consists of two parts

Part 1 is a multiple question, true or false exam**.

When you pass Part 1, you will complete Part 2 at home

Part 2 is an essay exam.

You have 30 days to complete & submit Part 2 of the exam

** 1st part is administered by your Division CRO Representative or at the Annual Conference and requires internet access to research your answers.

Notes or other reference material will not be allowed while taking the exam.

When Will I Know the Results?



You will be notified of the results within 30 days of submitting the essay exam.

Pay close attention to the essay instructions such as attaching your survey and providing a template of your City's staff report.

Your assessment and writing skills are also being evaluated in the essay exam.

Do I Need to Renew My Certification?



Yes, you need to renew your certification every 5 years. Here is what you need to do to apply for re-certification:

- Complete an application for re-certification documenting completion of 50 hours of continuing education in any CRO category
- Submit the application and \$35 application fee to your CRO Division Representative
- You must apply for re-certification within 2 years from your recent expiration date.
- Once the 2 year grace period has lapsed, you will need to apply as a “new” and start over