



# Choo Choo Chatter

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[www.chattanooga-arma.org](http://www.chattanooga-arma.org)

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## February Web Meeting

**Program:** "Federal Rules of Civil Procedure and their provisions dealing with the discovery of Electronically Stored Information"/  
**Web Meeting**

**Presenter:** Ronni Solomon, Counsel, King & Spalding,  
Atlanta, GA  
(Connection Information-please contact Scottie Swafford by February 6, 2009.)

**Date:** February 10, 2009

**Location:** Unum  
500 Walnut Street Chattanooga, TN 37402  
(Please see web site for directions -  
<http://www.chattanooga-arma.org>)

**Registration:** Other Attendees \$16.00  
Members & first time guests \$15.00

**Payment:** Cash or checks are accepted, payable at the door.

**Make payable to:** ARMA-Greater Chattanooga Area Chapter

**To RSVP, please call or email no later than 2:00 p.m., February 6, 2009:**

- Norma Parris, (423) 238-7111 x 2659,  
[norma\\_parris@mckee.com](mailto:norma_parris@mckee.com)
- Annie Powell, (423) 424-1305  
[anniepowell@gocarta.org](mailto:anniepowell@gocarta.org)

*\*Reservations not canceled by 2:00 p.m., February 6, 2009, will require payment of the registration fee.  
Contributions or gifts to our organization are not deductible as charitable contributions for U.S. federal income tax purposes. Membership dues and other payments may be deductible as ordinary necessary*

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**COMMITTEE CHAIRPERSONS**

Awards - Phyllis Beene

Education - Shawn Harris

Historian - Victoria Marshall

Hospitality/Communications – Susan Whitmire, CRM

ICRM Liaison - Lorraine Miller, CRM

Newsletter - Mary LaFollette

Publicity - Chris Akers

Webmaster – Joseph Kinunda/Scottie E. Swafford

CFC Liaison – Susan Whitmire, CRM



The Greater Chattanooga Chapter promotes and recognizes the importance of participation by awarding points to those who support ARMA activities at both the local and the international level. Points are earned by attending meetings, bringing guests, and by serving the Chapter as an officer or committee member. At the June meeting accumulated points are rewarded. The more you participate, the more points you can earn!

| <u>Support the Chapter</u>    | <u>Points</u> |
|-------------------------------|---------------|
| Attend Workshops              | 100           |
| Attend Luncheon Meetings      | 200           |
| Attend Dinner Meeting         | 300           |
| Bring a Guest                 | 100           |
| Attend Regional Conf.         | 400           |
| Perfect Attendance (Sept-May) | 500           |

| <u>Support ARMA International</u> | <u>Points</u> |
|-----------------------------------|---------------|
| Attend Annual Conference          | 200           |

| <u>Get Creative</u>  | <u>Points</u> |
|--|---------------|
| Submit article for newsletter (excludes routine notices, etc.) | 200           |

| <u>Get Involved Locally</u> | <u>Points</u> |
|-----------------------------|---------------|
| Be a Board Member           | 200           |
| Be a Committee Chair        | 150           |
| Be a Committee Member       | 100           |
| Attend a Board Meeting      | 100           |



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**PARTICIPATION STATION**

**Members Points**

| MEMBER             | POINTS | MEMBER                 | POINTS |
|--------------------|--------|------------------------|--------|
| Akers, Chris       | 600    | Miller, Lorraine       | 1400   |
| Beene, Phyllis     | 1200   | Mullins, Ronald        | 600    |
| Bostwick, Leanne   | 1100   | Orth, Linda            | 0      |
| Bullard, Gary      | 400    | Parris, Norma          | 1400   |
| Harris, Shawn      | 600    | Patterson, Gail        | 0      |
| Hixson, Shari      | 300    | Pettway, Robert        | 900    |
| Jackson, Dennis    | 0      | Phillips, Matthew      | 0      |
| Johnson, Linda     | 1300   | Powell, Annie          | 800    |
| Kile, Joan         | 900    | Ramachandran, Ravinder | 200    |
| Kimbrough, Charles | 1000   | Scott, Glenda          | 800    |
| Kinunda, Joseph    | 600    | Shugart, Jeff          | 400    |
| LaFollette, Mary   | 1300   | Stoddard, Catherine    | 600    |
| Long, Gregg        | 1500   | Swafford, Scottie      | 1200   |
| Marshall, Victoria | 1600   | Tisdale, Kevin         | 1100   |
| McEvoy, Laura      | 200    | Whitmire, Susan        | 1900   |



## TRAINING DEPOT

START PLANNING NOW  
TO ATTEND A FUTURE  
CONFERENCE:

### ARMA INTERNATIONAL CONFERENCES

October 15-18, 2009  
Orlando, FL

September 19-22, 2010  
San Francisco, CA

October 16-19, 2011  
Washington, D. C.

March 10, 2009  
"Generational Diversity"  
Ron Harris

April 16, 2009  
"Working IT/RIM Relationships"  
Helen Streck, Records Management Consultant  
Shook, Hardy & Bacon

May 12, 2009  
Site Visit and Year-end Business Meeting

June 2009  
Officer Installation & Awards Dinner



ARMA International

Greater Chattanooga Area Chapter  
P O Box 341  
Chattanooga TN 37401-0341

Want to invest in the future of your profession?

Make a contribution.

As an ARMA member.

As a Vendor to the profession.

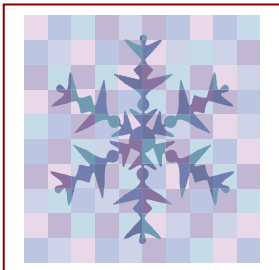
As an ARMA chapter.

See Susan Whitmire, CRM,  
Foundation Chapter Champion, for  
more details or log on to

[www.armaedfoundation.org](http://www.armaedfoundation.org)

Do you know someone who would benefit from receiving this newsletter?

Send their name, address and e-mail to  
[susan.whitmire@bcbst.com](mailto:susan.whitmire@bcbst.com)



## CRM Express

# Institute of Certified Records Managers



By Bruce White, CRM, PMP, Regent

In August and September the ICRM conducted a salary and demographic survey. I want to thank the 55% of our membership who participated. Here are some nuggets revealed from their responses that I'd like to share with you:

- Approximately 63% of those who replied are women, 37% men, almost a two to one ratio.
- If their responses are representative of the membership as a whole, most of our members tend to be in the middle or late years of their lives, with 29% over 55, 45% between the ages of 45 and 54 and 23% between the ages of 35 and 44.
- We are an educated group. Over 88% of the respondents have at least a Bachelor's degree and 47% have a graduate level degree. Types of degrees vary, with the traditional (Business Administration, Library Sciences and History/Archives) to the more interesting (Anthropology, French Literature and Home Economics).
- Over 50% have at least 21 years experience in the records and information management profession.
- 41% of us are employed with a large organization (5,001 employee plus), 26% work for medium size (1001 to 5000) and 31% for small (less than 1000).
- Our members work in diverse industries, with the largest percentage (27%) in government.
- Others major industries include Consulting (10%), Utilities (6%), Financial Services (6%), Energy (Oil/Gas/Coal) (5%) and manufacturing (5%).
- Approximately 32% report to Administrative Services, 27% report to General Counsel/Compliance, and (like me) 25% report to Information Technology.
- 82% of respondents work for an organization that has a formal records management program.
- In addition to the CRM, a number of the respondents possess other certifications. Examples include the Certified Archivist, Certified
- In addition to the CRM, a number of the respondents possess other certifications. Examples include the Certified Archivist, Certified Document Imaging Architect, Project Management Professional, Certified Public Accountant and the Certified Management Consultant.

**(CRM Express - Initial Results From the Membership Survey – continued)**

- 51% of the respondents made at least \$90K, with the average annual salary in the US just under \$95K while in Canada the average was just over \$93K. The highest salaries are, predictably, in the Pacific (\$107K) and Mid-Atlantic regions (\$104K) while salaries in the Midwest (\$81K) and Great Northwest (\$84K) on the lower end of the spectrum.
- Many of the respondents have multiple professional memberships. Over 88% belong to ARMA, 41% belong to AIIM and ARMA, 41% belong to AIIM, and 58% belong to another professional organization.
- Regarding benefits:
  - o 77% participate in a company sponsored 401K or 403b (government) retirement plan.
  - o 55% have access to a company pension plan.
  - o 74% receive medical benefits of some type.
  - o 48% are provided a cell phone, blackberry or other communication device.
  - o 28% are eligible to receive a bonus, stock options or both.
  - o 84% say their organization pays for conferences, including travel and lodging.

Mind you, the survey is not scientific, but the results provide what I believe is a good picture of our membership. I am still sorting through the data and hope to have the results published on our website soon. In the meantime, if you have any questions about the survey or these initial results, please let me know.

(Reprinted with permission from the Winter 2008 issue of the ICRM's *ProfessioNotes* newsletter).

## **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.

(Reprinted with permission from the Winter 2008 issue of the ICRM's *ProfessioNotes* newsletter).

## *Meeting in Review*

Presenter: Alicia Blevins, RHIA, CHP, Erlanger Health Systems  
Date: January 13, 2009  
Topic: My PHR – Starting and maintain a Personal Health Record  
Written by: Mary LaFollette, Editor

First of all, PHR means Personal Health Record. It is information about your health and the documenting of the care you have received, means by which you can discuss your care with healthcare professionals, and is the basis for planning your care and treatment.

Secondly, although the healthcare providers create and maintain your health records the information really belongs to you. You have the right to know where this information is going, who has access to it, and your rights regarding your healthcare information usage.

So why do we need a PHR? It is a way to record all your doctor visits, record your progress in maintaining your health and reaching health-related goals. It is a place to keep your doctor's instructions, all medications you are presently taking, any allergies you may have to medications, and to keep track of all your medical claims. Keeping track of any procedures that you may have had done will also help in avoiding duplication of services.

Getting access to your information as easy as filling out the "Authorization for the release of information" form and presenting it to any office that has your medical information. One thing to remember is that you may get charged for these copies. It is important to have copies of your records in case your doctor retires, moves, or dies. It is harder to locate your records once the provider is no longer in business or has moved.

Did you know that others besides your provider and authorized family members have access to your health records? The following have access to your health information:

- Public health and state or federal agencies
- Law enforcement are allowed limited access
- Your employer
- Life insurance companies can access information only with your authorization
- Marketing organizations are allowed limited access
- Health research organizations are allowed limited access

It is important to have a single source of health information whether it is kept electronically or physically in a file folder. Developing your PHR is one of the best ways to have constant access to your health information throughout your lifetime. This information can be useful if you are unable to communicate your health issues in an emergency.

To start your own PHR and to get useful tools, please visit the following website:

[myPHR.com](http://myPHR.com)

## *In the News . . .*

### Email Management Tips

How many emails do you have in your in box? More than a day's worth? Here are some tips to help you stay on top of your emails.

1. Purge "Deleted Items" folder regularly by emptying the Deleted Items folder every time you exit Outlook – This is really easy to set up. To purge your "Deleted Items" when exiting Outlook, go to the "Tools" menu, select "Options", click on the "Other" tab, and check the box to "Empty the Deleted Items folder upon exiting". I told you it was easy!
2. Delete "Expired Items" - These are usually corporate announcements and other types of emails announcing an event that has already past.
3. Save large email attachments to file shares - If you have a large attachment to an email that you will continue to reference, save it to a file share, and delete it from your mailbox. Open the attachment and do a "Save As" to save it to the appropriate folder.
4. Delete personal items - Remove any personal emails you may have. You know, the latest picture of your grandchildren that you just received. Forward it to your home email.
5. Schedule time for your email processing. I always find that Friday afternoons work best for me.
6. If a message requires research, schedule time for research, and let the sender know that you'll get back to them tomorrow.
7. Scan through your emails and work the easiest messages first.
8. You've been on vacation for a week and now your emails are out of control. Here is how to deal with the backlog.
  - Create a new Outlook folder to store your emails – yes, call it "backlog folder" if you want.
  - Move all the outstanding emails from your inbox to the new backlog folder.
  - Every day, preferably first thing in the morning, work at least one of the messages in the backlog folder. You will find that some emails are just informational, some require action, some you might be able to forward to another associate to handle for you. Try to work at least one email per day and remember to work the easy messages first.

I work my easy emails everyday. If an email requires research, I work those on the following day - first thing in the morning unless it is something that really cannot wait until tomorrow. I am at work at least an hour before any meetings or other commitments and can devote some time to my emails. These tips work for me and I hope you will also find them helpful.

Mary LaFollette, Editor

## *Greater Chattanooga Area Chapter ARMA Board of Directors*

### **Board Meeting Summary December 2, 2008**

The Greater Chattanooga Area Chapter Board of Directors held its November Meeting on December 2, 2008, via Conference Call due to the Thanksgiving Holidays. The Board approved a new Sponsorship Policy that will be posted to the Chapter website and all chapter members will be encouraged to solicit sponsorships.

Decisions by the Board:

- The Board approved a new Sponsorship Policy that will be posted to the Chapter website and all chapter members will be encouraged to solicit sponsorships.

Next Board Meeting will be at Wally's on January 27, 2009 – 7:30 am

### **FACTA OVERVIEW**

- **Federal Trade Commission passed the Act in 2003, effective June 1st, 2005.**
- **Designed to reduce the risk of consumer fraud and related harm, including identity theft.**
- **Created to stop the improper disposal of consumer information.**
- **This act generally makes everyone responsible for the security of this information.**
- **The Act sets standards for maintaining and possessing consumer information.**
- **Requires anyone who possesses consumer information to properly dispose of such information.**
- **Provides policies and procedures requiring burning, pulverizing, or shredding of papers or disks. Their are global enforcement provisions plus State, Federal and Civil Penalties for Non-Compliance.**

From – Pouch Records Management

### **San José State University**

The School of Library and Information Science at San José State University is now offering a Master's of Archives and Records Administration (MARA). Using the convenience and flexibility of a fully online format and cohort model, students will learn sophisticated technologies for organizing, preserving, and accessing the growing volume of digital and analog assets and electronic records that must comply with government regulations.