



National Association of Residential Property Managers

Certified Residential Management Company (CRMCC®) Handbook and Checklist

A Guide to Your NARPM® Designation

Revised February 2024

Become a Certified Residential Management Company (CRMC®)

This esteemed designation is awarded to professional property management firms that demonstrate a high standard in both procedures and customer service. A detailed examination of the company and recommendations from clients and peers are required.

Benefits of CRMC® Designation

- More Efficient Company

The process of earning the CRMC® Designation helps you to organize your business and make it more efficient as you put your training into practice by creating a more disciplined operation.

- Evaluate and Analyze to Produce

The CRMC® Designation checklist is designed so that you can evaluate all areas of your business—hardware, peripherals, environment, management style, staffing, = training, and customer relations. You will not only change through the process, but you will be rewarded with greater success.

- Structure Your Professional Improvement

While working toward the CRMC® Designation, you will add systems and procedures that fine-tune those already in place, improving your company and putting you ahead of the competition.

- Long Lasting Results

You will be required to recertify every three years. The recertification process will help you understand the importance of planning, executing new strategies, and remaining organized.

- Use the CRMC® Logo in Your Company Brand to Create a Professional Image

Pursuing of the CRMC® Designation will result in your firm producing a more professional image within the industry. You will have a professional brand and image to show prospective clients, residents, and peers. Plus, CRMC® firms are dynamic and constantly changing. Finally, the CRMC® renewal process will motivate you to look for new and better ways to improve your business.

Requirements for the CRMC®

Your firm must meet the following requirements:

- Be currently engaged in property management.
- Have an MPM® designee on staff.
- Provide verification of 500-unit years of management experience. (One (1) unit year equals management of one (1) residential unit for one (1) year.)
- Successfully complete either a virtual site or onsite visit from a NARPM® auditor selected by the Certification Committee.
- Complete the audit process within three years of making application.
- [Download the CRMC® Candidacy Checklist](#)
- [Apply for Designation](#)

The non-refundable application fee is \$350 for a single office with 4 or less offices or \$1,000 for firms that has 5 or more offices. The expenses of a virtual or onsite audit for the company are the responsibility of the company being audited.

Should it be determined that an additional onsite audit is deemed necessary, the company being audited will pay the expenses of the auditor. NARPM® will pay the auditor and the company will need to reimburse NARPM®.

The Designated MPM®

Your firm must have a designated MPM®, with whom NARPM® National will communicate with regarding candidacy status, renewals, and recertifications.

Branch Offices

The designation of a firm as a CRMC® applies to the firm's principle office (referred to as the CRMC® Headquarters) and extends to all the firm's branch offices. A branch office exists wherever these criteria are met:

- Property management is performed out of the office.
- The branch office is under the control or supervision of the designated MPM®.
- The work performed there benefits the management firm as a whole.

- There is at least one (1) full-time employee of the company at the office who can be contacted for business.
- The phone is listed and answered in the company name.
- There is a NARPM member in the location.
- Branch office operates under the same designated CRMC® firm name.

On your application, you must list all the firm's offices that meet the above criteria. Branch offices may be added or removed throughout the year; however, please note that if you add a branch office, you must apply for recertification within 60 days of establishing the office. At any time that is deemed necessary through the audit, a virtual audit for the company branch offices may be conducted and are the responsibility of the company being audited to ensure they are audited.

Franchises Holding CRMC®:

NARPM® shall require each purchaser of a franchise to apply for separate CRMC® Designations.

Ethics

All CRMC® firms must abide by the NARPM® Code of Ethics and Professional Standards, which NARPM® stringently enforces. The NARPM® Code regulates such vital areas as duties and relationships with clients, the public, and others in the industry.

The designated MPM® is held responsible not only for their own ethical conduct but also for the conduct of the individuals employed by the firm in a real estate management capacity. The designated MPM® is also responsible for informing and training employees about the NARPM® Code of Ethics. Ideas include displaying a framed copy of the NARPM® Code of Ethics and Professional Standards prominently in the firm's management offices and/or including a copy of the NARPM® Code of Ethics and Professional Standards and a summary of the CRMC® Membership Handbook in the firm's employee handbook.

Complaints may be filed against a NARPM® member and a CRMC® firm if there is reasonable cause to believe the NARPM® Code of Ethics and Professional Standards may have been violated. Ultimately, a firm's accreditation can be terminated,

suspended, or a letter of censure could be issued for violating the code.

Other Requirements

- Submit the CRMC[®] application with the non-refundable application fee.
- CRMC[®] firms will be required to recertify their designation every three (3) years and renew their CRMC[®] status annually. Recertification fees are \$150 for a single office with less than 4 offices and \$1,000 for firms with over 5 or more offices every three (3) years.

Completing your CRMC[®] Application

- Complete, gather, and submit the application to NARPM[®] National at: www.narpm.org/members/professional-designations/apply/ Once you have submitted your CRMC[®] application, staff will send you a link to the online upload to submit your documents. You have three (3) years to submit these documents. Failure to submit all the forms will delay the processing of your application and your approval as a CRMC[®] firm.
- Contact your CRMC[®] mentor. Having a mentor is a requirement of the designation. The mentor will walk you through the process and answer any questions you have while you are preparing for the audit. The mentor is required to send an email to the national office stating that you are ready for the audit.
- Letters of recommendation can be completed directly through the online upload.

CRMC® Approval Process

- When your firm's application is received by NARPM® National, it will be processed to determine that everything has been properly completed. You will be sent the link to upload your documentation.
- Designation candidacy for the CRMC® is three (3) years. A one (1) year extension may be granted for CRMC® candidacy. The following are required:
 - 1.) Submit in writing before the expiration of the current application period.
 - 2.) A fee equal to 50% of the application fee at time of extension is paid.
- Once you have uploaded and submitted all supporting documentation with your CRMC® Designation packet, NARPM® National will contact you to confirm receipt and schedule an auditor to perform the audit.
- An auditor will contact the designated MPM® to schedule an on-site or virtual audit within 30 days. Please note that the CRMC® candidate is responsible for the actual costs of auditor travel, lodging, and meals during audit travel. The auditor will submit expenses to National for approval, and then NARPM® National will send an invoice to the candidate to reimburse fees.
- Once the audit has been completed, NARPM® National will contact the candidate with the audit results and the status of designation approval. The Professional Development Committee will approve designations monthly. All CRMC® plaques will be presented at the Annual National Convention and Trade Show.

Maintaining the CRMC[®] Designation

CRMC[®] companies will be invoiced for their renewal and/or recertification's in October of each year and will have until the dues deadline to comply. Companies who fail to comply with the deadlines will be suspended for 90 days. If not completed by the deadline of the suspension, a recommendation will go to the Board of Director to decertify the CRMC[®] from the company.

Recertification

Recertification of the CRMC[®] Designation is required every three (3) years. Recertification is also required if your firm has had the following changes:

- A CRMC[®] firm must inform NARPM[®] promptly (within 30 days) of any change in name, ownership, or designated MPM[®].
- If the name of the firm changes but the ownership of the firm does not change, then they are only required to submit notification of this change to NARPM[®]. Confirmation of the change becomes effective upon Professional Development Committee approval.
- If the designated MPM[®] is changed, then the firm is required to recertify without completing a new audit.
- If the designated MPM[®] leaves without a replacement, then the CRMC[®] is immediately suspended, and the firm is required to replace the MPM[®] within the current three (3) year designation period to re-instate the CRMC[®] Designation. If the MPM[®] is replaced after the current three (3) year designation period, the designation expires, and the firm is required to complete a re-audit.
- If the CRMC[®] firm has had a change in ownership of greater than 50%, the firm must be recertified, even if it has been less than three (3) years requirement for recertification. If the designated MPM[®] is changed, then the firm is required to complete a new recertification within a six (6) month grace period from the time that NARPM[®] becomes aware of the change. During this grace period, the CRMC[®] will continue to be recognized as holding the designation without penalty. If the grace period expires without the designation being conferred under the new ownership, the designation is suspended. The recertification documents are to be reviewed by an auditor who is appointed by the Professional Development Committee.
- A new branch office has been added.

Renewal

CRMC® renewal is required annually.

CRMC Fees

Recertification fees are \$150 for a single office with less than 4 offices and \$1,000 for firms with over 5 or more offices every three (3) years. **

Renewal fees are \$150 annually for all firms.

All fees should be received no later than the membership dues billing deadline annually.

***If a recertification auditor should recommend an on-site re-audit, the firm will be responsible for auditor travel expenses.*

Code of Ethics and Standards of Professionalism for NARPM® and Anti-Trust Statement

NARPM Code of Ethics

For a current copy of the NARPM® Code of Ethics go to: <https://www.narpm.org/code-of-ethics/>

NARPM® Antitrust Statement:

It is the policy of the NARPM® to comply fully with all antitrust laws. The antitrust laws prohibit, among other things, any joint conduct among competitors that could lessen competition in the marketplace. NARPM®'s membership is composed of competitors; they must refrain from discussing competitively sensitive topics, including those related to pricing (such as rates, fees, or costs), individual competitors or specific business transactions, or controlling or allocating markets. Further, NARPM® shall not restrict members' ability to solicit competitors' clients or to advertise for business in any way that is not false, deceptive, or otherwise illegal.



National Association of Residential Property Managers

CRMCM® Designation Candidacy Checklist

Firm Name: _____

Type of Ownership (check one): Corporation LLC Partnership Sole

Proprietorship

Doing Business As (DBA's): _____

Designated MPM®: _____ Phone: _____

Email: _____

Does this firm have multiple locations? No Yes If yes, how many? _____

If yes, a branch office checklist list must be completed for branch location(s).

Number of accounts under management: _____

Number of Property Managers in Firm: _____

Number of NARPM® Members in Firm: _____

±

List each with NARPM® Designations after each name:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Auditor Requirements and General Instructions:

- The auditor shall determine that the applicant company meets specified minimums of professional criteria in each area of the audit.
- The firm must provide the auditor with their real estate state license in which they operate. If state does not require licensing, other documentation showing compliance with state Landlord Tenant laws. .
- If a line item in the application references compliance with a state or federal law, a letter from your attorney signifying compliance will be required.
- A letter from your CPA will be required to verify accounting requirements.
- The firm must provide the location of all offices that provide property management services under the name of the firm; the location of the bookkeeping department; and a copy of the pertinent documents for insurance, employee manual, policies and procedures, and the firms organization. If the branch office operates under a different set of policies and procedures, the applicant must submit a copy.
 - Provide a list of the required insurance that is required by the state for property management firms. Please provide current certificates of insurance for each insurance coverage and the required minimum rates.
- The auditor should verify both the written procedures and actual work practices for all offices of the company.
- Please highlight relevant policies and provide page numbers of items as they relate to your policies and procedures documentation provided for each verification requested.

Scoring:

- Items noted with an (**) must pass or the entire audit will fail.
- The auditor will rate each item and score one (1) point for each line that meets the stated requirement and zero (0) for each item that does not pass.
- If an item does not apply to the subject firm due to state or local laws, size of the company, or some other acceptable reason, the item can be marked “N/A” (Not Applicable) and that item can be omitted for the purposes of scoring.
- Within each category, add up the number of total items considered (excluding those marked “N/A”). The auditor will add up the number of items passed, and then divide the number passed by the total items considered to determine the percentage. Every category must have a pass rate of 90% of the items considered for the audit to pass.



National Association of Residential Property Managers

CRMC® Designation Candidacy Checklist

- I. Verification of 500 Unit Years of experience acquired over a minimum of five (5) consecutive years.

- II. Letters of Recommendation: Submit three (3) confidential letters of recommendation. (Forms can be completed on the online application.) Two (2) of the three letters must be from the following in any combination: a client of the firm; the firm’s accountant; the firm’s attorney; the firm’s bank; a tenant or resident. The third letter should be from a business associate of the firm.

Name: _____

Name: _____

Name: _____

III. Main Office:

- A. Office Structure (Please upload outline of office structure.) Check all that apply:
 - 1. Adequate workstations for staff. (Provide pictures or summary description.)
 - 2. Voicemail/messaging system. (Provide written description of how voicemails and phone calls are handled.)
 - 3. Mail flow. (Provide description of mail flow.)
 - 4. Filing system for company forms/contracts/support materials. (Provide written description of system.)
 - 5. Documentation of all communications regarding properties. (Provide description.) Page#: _____
 - 6. What is your documentation for all property expenses and maintenance? ** Page#: _____
 - 7. Staff workstations that are separate from conference/client/customer meeting areas. (Supply picture.)

8. Fair Housing Opportunity Poster displayed prominently in greeting area. ** (Supply picture.)
9. Database software. Name of software: _____
10. Company financial software. Name of software: _____
11. Accounting software. Name of software: _____
12. Computer security and regular back-up system. (Provide description of policy in place or highlight and provide page number in Policy and Procedure Manual.) Page#: _____

IV. Staff: Employee Policies (Upload Employee Policies and Procedures. Highlight corresponding sections and provide the page number in the manual.) Check all that apply:

A. Hiring

1. Description of procedures in place for hiring. Page#: _____
2. Description of procedures in place for interviewing. Page#: _____
3. Is criminal background check completed before hiring? Yes No
Page#: _____

B. Staffing

4. What is your staff to unit ratio? Staff _____ Units _____ = Ratio _____
5. Employees/Independent contractors provide documentation to support payroll/commissions. Page#: _____
6. What is your company structure: portfolio, departmental, or hybrid? Page#: _____

C. Employees

7. Job descriptions. Page#: _____
8. Employment policies. Page#: _____
9. Commission and/or wage and salary policies. Page#: _____
10. Employees' benefits. Page#: _____
11. Employee health and safety. Page#: _____
12. Standards of conduct and corrective action. Page#: _____
13. Sexual harassment policy. Page#: _____
14. Conflict of interest policy. Page#: _____
15. Fair housing policy. Page#: _____
16. Job review procedures. Page#: _____
17. Dispute resolution system. Page#: _____

18. Commercial insurance policy for company vehicles and staff used vehicles. Page#: _____

19. Use of company vehicles and/or equipment. Page#: _____

20. Confidentiality statement. Page#: _____

D. Ongoing Training Program

21. Staff meetings are held on a regular basis. (Monthly)

22. Outline process by which changes in procedures, policies, and laws are clearly communicated with staff.

23. Staff is trained in Fair Housing at least annually. **

24. Has staff receive required Ethics training?

V. Office Manual(s) and Property Management Operations (Please upload Office Policies and Procedures, highlight and label corresponding items for all offices, if different) Check all that apply:

A. Office Policy and Procedures

1. Mission statement(s). Page#: _____

2. Organizational chart. Page#: _____

3. Fair Housing procedures. Page#: _____

4. Lead base paint disclosures in compliance with federal and state guidelines. **

5. "Renovate Right" protocol in compliance with federal and state guidelines. **

6. EPA vendor protocol in compliance with federal and state guidelines. **

7. Letter from attorney acknowledging adherence to State Landlord/Tenant Law.

8. Advertising procedures. Page#: _____

9. Telephone use. Page#: _____

10. Office hours. Page#: _____

11. Holidays. Page#: _____

12. Emergencies. Page#: _____

13. Injury reduction procedures if required by state law. Page#: _____

B. Rental Policies (Please upload rental policies if not included in policies and procedures.)

Check here if these items are included in the P&P manual.)

Check all that apply:

14. Rental call handling/screening. Page#: _____

15. Property showing procedures. (Provide description of the process).
Page#: _____

- 16. Safety during showings procedure. Page#: _____
- 17. Written tenant selection policy. Page#: _____
- 18. Application security and retention. Page#: _____
- 19. Disclosure of application screening criteria to applicants. Page#: _____
- 20. Application acceptance and rejection procedures. (Advertise Action protocol.) ** Page#: _____
- 21. Application acceptance and rejection procedures. (Adverse Action protocol.) **
Page#: _____
- 22. Written security deposit policies in compliance with state laws. Page#: _____
- 23. Lease signing procedure. Page#: _____
- 24. Provide an example of a lease document package. Page#: _____
- 25. Lead based paint documents and process for tenants in accordance with state and federal guidelines. Page#: _____
- 26. Smoke detector/Carbon Monoxide Detector compliance with state and local ordinance. (Provide copy of local/state code.)
 - a. Describe your process to make sure smoke/CO detector in accordance with ordinances and local habitability code. Page#: _____

C. Key Systems and Policies

- 27. Secure key storage system. ** (Provide picture and description of process.) Page#: _____
- 28. Secure files for tenants/owner's personal data. (Description of system.) Page#: _____
- 30. File cabinets should be locked if file cabinets are not in a secure storage room.
Page#: _____
- 31. Desktop computers and laptops should have required login password for access. Page#: _____
- 32. Logging and tracking of keys. Page#: _____
- 33. Written policy regarding key control. Page#: _____

D. Files/Office/Device Security

- 34. Efficient and organizing filing system. Maybe paperless. ** (Provide picture and description.)
- 35. Personnel files in a secure location. ** (Provide picture.)
- 36. Passwords for lock screens for cell phones, iPad, etc.** (Provide copy of policy.)
- 37. How are security codes tracked? Provide a copy. Page#: _____

38. Do computers/laptops have a sleep time/lock screen time? Yes No
Time frame that lock screen will engage? _____

E. Accounting Policies

- 39. Procedure for handling of cash and other receipts. Page#: _____
- 40. Procedures for handling of payables and invoices. Page#: _____
- 41. Compliance with state requirement for regular reporting. ** Page#: _____
(Provide copy of state requirement compliance.)
- 42. Statements sent to owners contain summary of all income, expenses, starting, and ending balances for each property. Page#: _____
- 43. Reports are reviewed for accuracy. Who reviews owner reports in your company? Title of Reviewer: _____ Page#: _____
- 44. Owner, tenant, and company accounting files are maintained and stored per a required time in accordance with state and federal rules. How long are you required to hold documents? ** _____ Page#: _____
- 45. Reimbursement procedures for employee purchases on behalf of the firm and clients. Page#: _____
- 46. Monthly "three way" reconciliation of trust/owner/security deposit accounts.
Page#: _____
- 47. Security deposit handling. Page#: _____
- 48. If online, owner statements are password protected. ** Page#: _____
- 49. Company operating account, trust/rent payment and security deposit accounts are set up and labeled in compliance with state and regulatory body. Page#: _____ (Provide a copy of state policy.)

F. Maintenance and Repairs

- 50. Work requests tracking. Page#: _____
- 51. Emergency procedures. Page#: _____
- 52. Follow-up procedures. Page#: _____
- 53. Invoice receipt and approval procedures. Page#: _____
- 54. Verification of vendors licensing, bonds, liability, and workers compensation insurance follows state requirements. Page#: _____ Provide copy of state policy.)

G. Property Managers that work out of their homes

- 55. Do they have a copy and/or access to Firm Policies and Procedures? Yes No
- 56. Are contacts/rental lease agreements reviewed by broker/manager on a routine timely basis? Yes No Time Frame: _____
- 57. Is all documentation stored in the main office? Yes No
- 58. Key handling process. Page#: _____ (Provide summary of process)
- 59. Do supervision/system oversight forms exist? (Provide summary of policy) Page#: _____

60. Is there a policy requiring security outside the office for computer passwords, paperwork at their homes, etc. Yes No? age#: _____

H. Other Company Policies and Procedures

- 61. Collection procedures. Page#: _____
- 62. Eviction procedures. Page#: _____
- 63. Move in/move out procedures. _____ Page#
- 64. New account procedures. Page#: _____
- 65. Customer dispute resolution system. Page#: _____
- 66. Property inspection procedures. Page#: _____
- 67. Habitability standards. Page#: _____
- 68. Death of tenant procedure. Page#: _____

VI. Client and Customer Contracts/Agreements (please upload all forms and contracts). Check all that apply:

A. Management Agreement

- 1. Gives firm authority to act as agent. ** Page#: _____
- 2. Requires owner to maintain property and liability coverage or to acknowledge they are self-insured. ** Page#: _____
- 3. Requests owner to add firm as an additional insured on the property liability policy. Page#: _____

- 4. Includes hold harmless clause in favor of firm. Page#: _____
- 5. Agreement follows state laws. ** Page#: _____ (Provide letter from attorney.)
- 6. Discloses that owner funds are separate from firm funds. ** Page#: _____ (Provide letter from CPA.)
- 7. States how often accounting statements will be provided to the owner. ** Page#: _____
- 8. Sets limit for maintenance expenses. Page#: _____
- 9. Lists all fees and how those fees are determined. ** Page#: _____
- 10. Discloses interest in all other companies. ** Page#: _____
- 11. Provides for cancellation of contract.

B. Lease/Rental Agreement (Upload a copy of lease agreement.)

- 12. Shows firm/manager as agent for the owner. Page#: _____
- 13. Owner is disclosed as landlord. ** Page#: _____
- 14. Describes conditions for return of the security deposit and where the deposit is held. Page#: _____
- 15. Includes lead-based paint disclosure, where applicable, and booklet given to tenant. Page#: _____
- 16. Includes disclosure regarding liability of insurance. Page#: _____
- 17. Includes responsibility division in regards to maintenance. Page#: _____
- 18. Includes responsibility for checking smoke detectors. Page#: _____

19. Agreement follows state laws. Page#: _____ (Provide letter from attorney)
20. States the term and rental rate. Page#: _____
21. Includes pet policy when applicable. Page#: _____
22. Includes names of all occupants. Page#: _____
23. Copy of lease and all signed documents given to tenant by firm. **
Page#: _____
24. Copy of any legal ruling document provided to tenant. (HOA Rules).
Page#: _____
25. Copy of any property condition report given to tenant and maintained by
firm. ** Page#: _____
26. Security deposit refund determination and supporting documentation
sent to tenant meet state requirements.

VII. Firm

A. Insurance (please upload policies). Check all that apply:
Provide a list of required insurance required by the state for property management firms. Please provide current certificates of insurance for each insurance coverage and the required minimum rates.

1. Company Liability Insurance. ** Page#: _____
2. Auto Insurance for firm owned vehicles. Page#: _____
3. Non-owned auto coverage verification policy. Page#: _____
4. Workers compensation. Page#: _____
5. Maintenance policy. Page#: _____
6. Provide copy of contents policy. Page#: _____

B. Tax Compliance. Check all that apply:

7. Firm/division financial statements. (Please provide a current company statement.)
8. Filing system for company state and federal tax returns. Page#: _____
(Please provide description of system.)
9. Verification of 1099 reporting compliance on client's rental and other income.
10. Verification of providing tenant CRP's (certificate of Rents Paid) is provided to tenants. (MN/WI)

11.

CRMC® Designation Audit Checklist

Branch Office Checklist

CRMC® companies, such as franchises , with multi-branch offices must fill out a branch office checklist..

How many branches does the firm operate? Please list location addresses:

VIII. Branch Office (*Complete only if applicable; upload one sheet for each location.*)

A. Proper Office Organization/Documents/Computer

1. Adequate workstations for staff.
2. Voicemail messaging system.
3. Telephone/communication intercom system.
4. Information/communication process with main office.
5. Organized company forms/contracts/support materials.
6. Office equipment adequate and organized.
7. Secure key storage system. **
8. Existence of secure complete and organized files for all properties.
9. Documentation of all communications regarding properties.
10. Efficient and organized filing system. May be paperless. **
11. Staff workstations are separate from client/customer meeting areas.
12. Storage and break areas.
13. Fair Housing Opportunity Poster displayed. ** (Provide picture.)
14. Adequate equipment relative to staff.
15. Database software. Product name: _____
16. Company financial software. Product name: _____
17. Accounting software. Product name: _____
18. Computer security in compliance with company policy and procedures.
19. Computer regular back-up system in compliance with company policy and procedures.

20. Website provides accurate information including contacts and vacancies.

B. Staffing and Supervision

21. At least one NARPM® Member at this location. ** List Member name and member number:

22. Broker/manager reviews all documents and provides oversight. (Provide summary of policy.)