

2011



Professional Recognition for IT Service Management (priSM®) Credential Handbook

The priSM credentials are for those who lead and direct Service Management activities or who are committed to Service Management in their careers and studies.

www.theprisminstitute.org



This handbook provides the necessary information enabling one to apply for or maintain the globally recognized priSM® credential.

priSM® Credential Handbook updated February 7, 2011 v5

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Introduction

About *itSMF*'s *priSM*[®] Credentials

Thank you for your interest in *itSMF*'s Professional Recognition for IT Service Management (*priSM*) credential.

As a global organization with a 20-year history of advocacy for the profession, the *itSMF* supports practitioners within the field of Service Management. Utilizing this rich background, the *priSM* program was developed to objectively assess the experience, education, knowledge and skills of the applicant and provide a credential.

The *priSM* credential levels include:

- Student in Service Management (**SSM**[®])
- Associate in Service Management (**ASM**[®])
- Professional in Service Management (**PSM**[®])
- Distinguished Professional in Service Management (**DPSM**[®])
- Fellow in Service Management (**FSM**[®])

priSM credentials confirm ones' dedication to and proficiency in Service Management. To attain a credential level, the educational and professional experience requirements established by the *priSM* Institute[®] must be met. This, and additional information, will be taken into account to demonstrate each applicant's level of Service Management education, experience and knowledge to *priSM* auditors.

Earning the *priSM* credential provides distinction and recognition in a growing community of Service Management practitioners. A *priSM* credential also increases one's visibility within their organization and on a global level.

In order to maintain the credential, ongoing professional commitment to the field of Service Management is required and met by satisfying the *priSM* Continuing Professional Development (CPD) program requirements and through annual credential renewal.

To establish credibility in the field of Service Management via the application of Service Management practices, continue the application process. This handbook discusses all of the policies and procedures that are involved in applying for, obtaining, maintaining as well as moving to the next *priSM* credential level. Please read completely and carefully *prior* to application submission.

***priSM* Mission: Initiate, establish, evaluate, maintain and administer a professional credential program to promote and support Service Management practitioners and the profession.**

About This Credential Handbook

This credential handbook will:

- Assist you in the determination of which credential level is most appropriate
- Provide important information about the credentialing process
- Outline the eligibility requirements for the five credential levels
- Provide guidance for the application submission and the Continuing Professional Development (CPD) program
- List the initial and renewal fees and detail the refund policy
- Detail the operational policies and procedures within **prISM**
- Provide contact information for **prISM**

Please review this handbook **in full** so you may experience a smooth application process. If clarification is required or you have any questions, please contact the **prISM** administrative team before you proceed with your application.

prISM Contact Information

Global **prISM** Institute

E-mail: admin-global@theprisminstitute.org

Regional **prISM** Institutes

Americas **prISM** Institute – admin-america@theprisminstitute.org
Manages itSMF Chapters in North, Central South America; Asia-PacRim

EMEA **prISM** Institute – admin-emea@theprisminstitute.org
Manages itSMF Chapters in Europe, Middle East, Africa

Asia-PacRim **prISM** Institute – admin-pacrim@TBD.com
(As of 2/7/11, this Regional prISM Institute is not yet active; contact the Americas Regional prISM Institute)

NB: web and email address may change without notice as the global prISM website is developed and activated.

prISM Forms

The following forms are to be completed by the individual applicant:

- **Application** (complete one)
 - **prISM** Application: **Student**
 - **prISM** Open Enrollment Application (this is for all **new** applications (other than Student)
 - **prISM** ISM Transfer Application (this is for **current** ISM members who wish to transfer their membership to prISM)

Supplemental Forms:

- **priSM** Calculator & Checklist Form (required)
- **priSM** Statement of Sponsorship/Reference Form (required)
- **priSM** Supplemental CV Addendum Form (for applicants **without** a résumé or CV)
- **priSM** CPD Submission form (needed to report CPD activity **after** the awarding of a credential)
- **priSM** Fellow Nomination and Reference forms (for annual nomination process)
- **priSM** CPD Qualification Form (needed to pre-certify events for CPDs)

Forms may be found on and downloaded from the **priSM** website.

The priSM Institute

Mission

The mission of the priSM Institute (*why we exist*) is to promote professional recognition of Service Management professionals based on their experience, educational achievements and professional activities.

Using a defined global scheme to award credentials, Service Management professionals can plan and manage their continuing professional development. Additionally, the credential scheme provides a level of assurance for the Service Management customer or employer, promotes the profession of Service Management, and advances the Service Management Body of Knowledge.

Vision

The vision of the priSM Institute (*what we want to be*) is to be the acknowledged and definitive authority for recognizing and credentialing Service Management professionals worldwide.

The priSM Program

Overview of the **priSM** Credential Process

The **priSM** program was initiated in 2010 to recognize an individual's demonstrated understanding and application of the necessary knowledge and skills required to design, implement, maintain or improve Service Management activities. Candidates for the **priSM** credential must demonstrate to the satisfaction of an independent reviewer, via their application and supporting documentation, the following:

- Current and historical (if applicable) level of responsibility, experience and competence within Service Management
 - **Service Management** has been defined as the activities, performed by service provider groups through an appropriate mix of people, processes and technology, that support the implementation and management of quality services that meet the needs of the business (loosely from *A Dictionary of IT Service Management Terms, Acronyms and Abbreviations*, ©2007 itSMF Ltd)
- Continual engagement in the field of Service Management in the eyes of peers, employers, clients and subordinates
- Commitment to professional development and continuing education
- Endorsement and commitment to a code of conduct



Candidates must fulfill specific mandatory requirements stated for each credential level. Understand what has been documented in the tables below are the absolute **minimums**. Candidates may exceed the minimum requirements for one credential level but not meet the requirements for the next level. Once the credential


has been awarded, the individual must fulfill the annual Continuing Professional Development requirement and renew the annual fee.


Candidates that do not meet all of the specified minimum eligibility requirements, but believe they have equivalent qualifications should provide that evidence with their application. These candidates may be contacted to clarify the claim. Additionally, *pri*SM auditors reserve the right to contact references or others who endorse the application in order to validate the claims. In cases where an applicant is requesting an exception, the normal application processing times are not guaranteed.


Eligibility Requirements

To be eligible for the *pri*SM credential, one must meet certain educational and professional experience requirements. All Service Management experience must have been accrued within the last twelve (12) consecutive years prior to the application submission. The requirements for each credential are listed in the tables that follow.

Level	Qualifications
<p data-bbox="186 426 358 453">Student – SSM[®]</p> 	<p data-bbox="459 426 1422 552">This level is appropriate for the undergraduate or graduate student (carrying at least a 50% normal full-time academic course of study) who does not meet the requirements for the Associate credential holder. Please note there is an eight (8) year membership limit within the Student designation.</p> <p data-bbox="459 594 727 621">Mandatory Requirements:</p> <ul data-bbox="459 642 1417 821" style="list-style-type: none"> • Student Membership (or any form of membership) with itSMF • Signed <i>itSMF</i> Code of Ethics form • Enrolled (at least 50% of a normal full-time course of study) in an accredited college/university course of study • Demonstrate a reasonable interest in the area of Service Management (essay section of the application form) <p data-bbox="459 852 651 879">Applicant submits:</p> <ul data-bbox="459 900 1385 1056" style="list-style-type: none"> • Signed copy of the priSM Application Form with a signed copy of the <i>itSMF</i> Code of Ethics and priSM agreement (included at the end of this application) • Résumé, CV or priSM Supplemental CV Addendum Form • Class schedule/transcript must include institution and student name • Completed and signed priSM Student Sponsorship Form
<p data-bbox="186 1102 380 1129">Associate – ASM[®]</p> 	<p data-bbox="459 1102 1406 1228">This level is the starting point for members who do not meet the criteria for a Professional designation but would benefit from membership and partnership in <i>itSMF</i>. At this level, the applicant would be progressing their career though continuing education and work experience to meet the qualifications at the Professional level.</p> <p data-bbox="459 1260 727 1287">Mandatory Requirements:</p> <ul data-bbox="459 1308 1179 1402" style="list-style-type: none"> • Membership in <i>itSMF</i> (reciprocity with other chapters upon request) • Signed <i>itSMF</i> Code of Ethics form • One (1) certificate at the Associate level from the Approved Certification List <p data-bbox="459 1434 651 1461">Applicant submits:</p> <ul data-bbox="459 1482 1425 1692" style="list-style-type: none"> • Signed copy of the priSM Application Form with a signed copy of the <i>itSMF</i> Code of Ethics and priSM agreement (included at the end of this application) • Résumé, CV or priSM Supplemental CV Addendum Form • priSM Calculator & Checklist Form and documentary evidence as follows: <ul data-bbox="508 1602 1425 1661" style="list-style-type: none"> • One (1) certificate demonstrating training at the Associate level from the Approved Certification list. This documentary evidence may be a photocopy or scanned image. • Completed and signed priSM Reference Form.

Level	Qualifications
<p data-bbox="188 432 412 464">Professional – PSM®</p> 	<p data-bbox="461 432 1422 489">The Professional level is open to those who have met the priSM-specified requirements (educational and experience) and demonstrated professional competence in Service Management.</p> <p data-bbox="461 522 727 548">Mandatory Requirements:</p> <ul data-bbox="461 573 1417 1052" style="list-style-type: none"> • Membership in <i>itSMF</i> (reciprocity with other chapters upon request) • Signed <i>itSMF</i> Code of Ethics form • Must meet one (1) of the following options: <ul data-bbox="509 663 1417 867" style="list-style-type: none"> A. An accredited 3-5 year university or higher degree with an emphasis in Service Management B. A Bachelor’s degree (3-5 year program) plus two (2) years of ITSM experience (<i>for example</i>, Service Desk agent, process team member, business relationship team member, etc...) C. An Associate’s degree plus four (4) years of ITSM experience (<i>for example</i>, Service Desk agent, process team member, business relationship team member, etc...) D. Six (6) years of ITSM experience (<i>for example</i>, Service Desk Supervisor, process team member, Security analyst, business relationship team member, etc...) • Two (2) certificates at the Professional level or above from the Approved Certification List <p data-bbox="509 905 1198 930">Note: The following single certificate fulfills the two (2) certificate requirement:</p> <ul data-bbox="509 934 1417 989" style="list-style-type: none"> • An advanced college/university degree in a Service Management related field (MBA, MA/MS, PhD, etc...) • Six (6) additional points from the Approved Certification and/or Qualification List (prerequisites for the required two (2) certificates (above) cannot be used to fulfill this requirement) <p data-bbox="461 1083 651 1108">Applicant submits:</p> <ul data-bbox="461 1146 1433 1707" style="list-style-type: none"> • Signed copy of the priSM Application Form with a signed copy of the <i>itSMF</i> Code of Ethics and priSM agreement (included at the end of this application) • One of the following sets of documentation: <ul data-bbox="509 1266 1417 1472" style="list-style-type: none"> • Diploma, transcript or other validation of a 3-5 year university (or higher) degree with an emphasis in Service Management OR • Diploma, transcript or other validation of a Bachelor’s degree (3-5 year program) plus a résumé or CV demonstrating two (2) years of ITSM Experience OR • Diploma, transcript or other validation of an Associate’s degree (2 year program) plus a résumé or CV demonstrating four (4) years of ITSM Experience OR • Résumé, CV or priSM Supplemental CV Addendum Form • priSM Calculator & Checklist Form and documentary evidence as follows: <ul data-bbox="509 1535 1417 1650" style="list-style-type: none"> • Two (2) certificates obtained from training programs at the Professional level listed on the Approved Certification List (or the single certificate as described above) • Documentation of having earned six (6) points from the Approved Certification and/or Qualification List • Completed and signed priSM Reference Form

Level	Qualifications
<p data-bbox="188 436 423 499">Distinguished Professional – DPSM®</p> 	<p data-bbox="461 428 1386 554">The Distinguished Professional level is open to those who have met the priSM-specified requirements at the Professional level and have demonstrated professional maturity in Service Management. The Distinguished Professional will have a minimum of ten (10) years Service Management experience such as:</p> <ul data-bbox="509 562 1419 722" style="list-style-type: none"> • Substantial growth, tenure, responsibility or achievement as a Service Management professional (e.g., process manager, process owner, project manager, service management program director, service owner, etc...) • Recognized service management industry contributions such as leadership, publications, mentoring, speaking, volunteering, etc... <p data-bbox="461 756 727 781">Mandatory Requirements:</p> <ul data-bbox="461 806 1403 1045" style="list-style-type: none"> • Membership in <i>itSMF</i> (reciprocity with other chapters upon request) • Signed <i>itSMF</i> Code of Ethics form • Ten (10) years of Service Management experience (defined above) • Two (2) certificates at the Distinguished Professional level from the Approved Certification List, one (1) must be Service Management-based (ISO/IEC 20000, v1/v2/v3 ITIL) • Ten (10) additional points from the Approved Certification and/or Qualification List (neither the prerequisites for the required certificates nor the two certificates themselves can be used to fulfill the ten (10) point requirement). <p data-bbox="461 1079 649 1104">Applicant submits:</p> <ul data-bbox="461 1129 1419 1457" style="list-style-type: none"> • Signed copy of the priSM Application Form with a signed copy of the <i>itSMF</i> Code of Ethics and priSM agreement (included at the end of this application) • Résumé, CV or priSM Supplemental CV Addendum Form • priSM Calculator & Checklist Form and documentary evidence as follows: <ul data-bbox="509 1251 1419 1428" style="list-style-type: none"> • Two (2) certificates obtained from training programs at the Distinguished Professional level, one (1) must be either v1/v2 ITIL® Manager’s Certificate, v3 ITIL® Expert via v2-v3 Manager Bridge or MALC, Executive Consultant/Manager or Executive Auditor according to ISO/IEC 20000) • Documentation of having earned ten (10) points from the Approved Certification and/or Qualification List (prerequisites for the two required certificates are not eligible; do NOT count the two (2) required certificates in the 10 required points) • Completed and signed priSM Reference Form

Level	Qualifications
<p data-bbox="188 432 344 464">Fellow – FSM®</p> 	<p data-bbox="461 432 1422 554">The priSM Fellow is an industry leader whose contributions to the Service Management profession are recognized by other industry leaders and their peers. This prestigious achievement will be conferred annually upon a select group of DPSM credential holders by the Regional priSM Institute leadership based on peer recommendations and review.</p> <p data-bbox="461 590 1406 714">The Fellow credential is an honorary credential awarded to a DPSM credential holder for their commitment to the advancement of Service Management through demonstrated proficiency and leadership. The individual who is awarded the Fellow credential is an outstanding practitioner, educator, leader and luminary.</p> <p data-bbox="461 749 1406 873">There is an annual regional nomination period where the number of approved Fellows cannot exceed 5% of the total credential holder pool. This credential is granted on a continual, perpetual basis as long as the recipient remains in good standing (e.g., fulfilling annual CPD requirement, itSMF membership, priSM renewal fee).</p> <p data-bbox="461 909 561 934">Eligibility:</p> <ul data-bbox="461 951 1432 1241" style="list-style-type: none"> • DPSM credential holder (CH) in good standing for at least two (2) years, preceding the year of nomination • Must have made an outstanding contribution(s) to the advancement of the field of Service Management via: <ul data-bbox="509 1031 1373 1241" style="list-style-type: none"> • Formal contribution (e.g., author, review, etc...) to one or more Service Management-oriented publications (i.e., OGC, itSMF, ISACA, etc...) • Leadership contribution, for example: <ul data-bbox="558 1110 1338 1211" style="list-style-type: none"> • Holding an officer level, volunteer role in a bona fide IT Service Management-related organization (itSMF, etc...) • Contributing to Service Management-related industry standards by participating on a standards committee • Industry ‘expert’ as recognized by peers (e.g., practitioner, educator, etc...) <p data-bbox="461 1272 669 1297">Nomination Process:</p> <ul data-bbox="461 1314 1419 1724" style="list-style-type: none"> • Any individual, regardless of their affiliation to itSMF may nominate a candidate for priSM Fellow except: <ul data-bbox="509 1339 1338 1457" style="list-style-type: none"> • priSM board member • itSMF Chapter board member or other Service Management organization Board members • Members of the priSM Fellow committee (those that review nominations) • Self-nominations are not allowed <p data-bbox="558 1461 1357 1514">Note: While the above cannot nominate a potential candidate, they could write a supporting recommendation</p> • The nominator must complete the Fellow Nomination form and solicit at least five (5) additional references (no more than 7) <ul data-bbox="509 1566 1386 1724" style="list-style-type: none"> • At least two of the references must hold the priSM Fellow credential <ul data-bbox="558 1591 1143 1619" style="list-style-type: none"> • All references must be in good standing with priSM and itSMF • The references independently complete the Fellow Recommendation form • The Nomination and Reference forms must be submitted to the Rpl no later than 1 April • The nominator is the SOLE contact during the nomination process – no other individual should contact the Rpl for information/updates during the process/review <p data-bbox="461 1755 659 1780">Vetting & Approval:</p> <ul data-bbox="461 1797 1211 1894" style="list-style-type: none"> • An annually selected priSM Fellow Committee reviews and vets each nomination • Review criteria is based on and is numerically calculated: <ul data-bbox="509 1850 1146 1894" style="list-style-type: none"> • Significant contribution as a practitioner, educator, author, advocate • Evidence of accomplishment

Level	Qualifications
	<ul style="list-style-type: none"> • Opinions of references • Service to other professional organizations • Years in the profession • The committee will forward their recommended candidates to the Rpl Board for confirmation and approval • Candidates will be notified of the results; new Fellows will be awarded their credential at a Chapter conference within the Region in Q4 of the calendar year

Calculating Required Points

The following tables list the current courses and activities currently accepted for each credential level. Use the “Approved Certifications” list for the Service Management education requirements at the **Associate**, **Professional** or **Distinguished Professional** level. The second list, “Approved Qualifications,” provides additional professional activities for the required points at each credential.

These lists will change as more courses or activities are added (or removed). The most current list can be found on the **priSM** website.

***For example**, since graduating from Knowledge U, J. Smith has been actively working within an ITSM organization for the past four (4) years and has been the Problem Manager for the past year. In that time, several professional certifications were achieved such as the v2 Foundation certification, two (2) v2 Practitioner certificates, the v2-v3 Foundation Bridge and two (2) Lifecycle courses. Additionally, Smith has been active in the Local Interest Group (has attended 6 meetings) and has attended two (2) Fusion conferences, where he volunteered as a room monitor at both events. While not a priority, a white paper on overcoming the status quo has been submitted but not yet accepted for publication. At what level should Smith apply?*

Answer: J. Smith would qualify at the **Professional** level.

1. Bachelor’s Degree and four (4) years’ experience (exceeds the two (2) year experience requirement)
 2. 2 certificates at the Professional level (v2 Practitioner x2)
 3. 6 additional points: 2 Lifecycle courses = 2, conference volunteer = 2, Process Manager = 2
- J. Smith could not apply for **Distinguished Professional** - not enough experience (only has four (4) years and requires a minimum of 10 years), no advanced certificate (v3 ITIL[®] Expert, Six Sigma Master Black Belt), etc...

Note: the **priSM** Calculator and Checklist spreadsheet will perform this calculation automatically – download a copy from the **priSM** website.

Approved Certifications

Certification	Point Value	Certificates Applied to...		
		Associate	Professional	Distinguished Professional
1-day Service Management Simulation Workshop	1	X		
CMMI-based Process Improvement Overview	1	X		
Implementing CMMI for High Performance, an Executive Seminar	1	X		
ITIL [®] v2 or v3 Foundation	1	X		
Foundation Certificate in ITSM according to ISO/IEC 20000 (complementary qualification from EXIN)	1	X		
Information Security Management Foundation based on ISO/IEC 27002	1	X		
MOF Essentials	1	X		
COBIT [®] Foundation	1	X		
CISA (ISACA)	1	X		
Six Sigma White Belt	1	X		
SFIA/BCS Foundation Level Certificate in Service Management <small>*Use v4.0 of the SFIA structure; courses that address levels 1 or 2 (Follow, Assist respectively) apply here</small>	1	X		
PMI CAPM certification	1	X		
PRINCE2 Foundation	1	X		
HDI Support Center Analyst (HDI-SCA)	1	X		
HDI Support Center Desktop Technician (HDI-DST)	1	X		
HDI Support Center Team Lead (HDI-SCTL)	1	X		
Knowledge-Centered Support (KCS) Fundamentals	1	X		
SDI Service Desk Foundation	1	X		
SDI Service Desk Analyst	1	X		
SDI Service Desk Senior Analyst	1	X		
ITIL [®] v2 Practitioner (IPAD, IPPI, IPRC, IPSR)	2		X	
ITIL [®] v3 Lifecycle (SS, SD, ST, SO, CSI)	1		X	
ITIL [®] v3 Capability (SOA, PPO, RCV, OSA)	2		X	
Professional Level Certificate in ITSM according to ISO/IEC 20000 (Alignment, Delivery, Support, Control)	2		X	
Professional Level Certificate in ITSM according to ISO/IEC 20000: Manage & Improve	2		X	

Certification	Point Value	Certificates Applied to...		
		Associate	Professional	Distinguished Professional
Consultant Manager or Internal Auditor in ITSM according to ISO/IEC 20000	2		X	
Certified Process Design Engineer (CPDE) (complementary qualification from LCS)	2		X	
ICT Infrastructure Management (complementary qualification from ISEB)	3		X	
Service Catalog (complementary qualification from APMG)	1		X	
CMDB (complementary qualification from APMG)	1		X	
Change Analyst (complementary qualification from APMG)	1		X	
Service Desk & Incident Management Specialist (complementary qualification from ISEB)	1		X	
Service Level Management Specialist (complementary qualification from ISEB)	1		X	
Change Management Specialist (complementary qualification from ISEB)	1		X	
Problem Management (complementary qualification from ISEB)	1		X	
BRM (complementary qualification from ISEB)	1		X	
Supplier Management (complementary qualification from ISEB)	1		X	
BS15000 Auditor or Consultant	2		X	
ISO/IEC 20000 Auditor or Consultant (itSMF)	2		X	
Information Security Management Advanced based on ISO/IEC 27002	1		X	
ISMS Lead Auditor based on 27001	2		X	
SFIA/BCS Practitioner Qualification *Use v4.0 of the SFIA structure; courses that address levels 3 or higher (Apply, Enable, Ensure/advise, Initiate/influence, Set strategy/inspire/mobilize, respectively) apply here	2		X	
CQE or CQA (ASQ)	2		X	
CISSP ((ISC) ²)	2		X	
CISM (ISACA)	2		X	
CGEIT (ISACA)	2		X	
CompTIA CDIA+	2		X	
CompTIA DTT+	2		X	
CompTIA Project+	2		X	
CompTIA Security+	2		X	
PMI PMP or PgMP	2		X	

Certification	Point Value	Certificates Applied to...		
		Associate	Professional	Distinguished Professional
PRINCE2 Practitioner	2		X	
Knowledge-Centered Support (KCS) Principles	1		X	
HDI Desktop Support Manager (HDI-DSM)	1		X	
HDI Support Center Manager (HDI-SCM)	1		X	
HDI Support Center Director (HDI-SCD)	1		X	
SDI Service Desk Manager	2		X	
KT ITSM Problem & Incident Management workshop (with exam)	1		X	
KT Incident Mapping	1		X	
KT Rational Process Mastery	2		X	
KT Managing People in Projects	1		X	
Six Sigma Yellow Belt (IASSAC)	3		X	
Six Sigma Green Belt (IASSAC)	4		X	
MBA, MA/MS or the equivalent (<i>in a Service Management-related field</i>) *This certificate will fulfill the 2 certificate requirement at the Professional level	3		X	
PhD, Ed.D. or the equivalent (<i>in a Service Management-related field</i>) *This certificate will fulfill the 2 certificate requirement at the Professional level	4		X	
ITIL [®] v1/v2 Manager's Certificate in IT Service Management (ITSMMC)*	7			X
ITIL [®] v3 Expert via the v2-v3 Manager Bridge course*	1			X
ITIL [®] v3 Expert via MALC (Managing Across the Lifecycle)*	2			X
Executive Consultant/Manager or Executive Auditor in ITSM according to ISO/IEC 20000*	4			X
KT Process Facilitator & Coach Certification	3			X
SEI Certificate in CMMI	7			X
Six Sigma Black Belt (IASSAC)	7			X
Six Sigma Master Black Belt (IASSAC)	7			X
PMI-SP or PMI-RMP	4			X

One (1) of these courses, indicated by an asterisk (), is required for DPSM plus one additional from this list. If both the v2 Manager and v3 ITIL[®] Expert are held, the certification requirement at the Distinguished Professional level is fulfilled.

For example, if A. Brown holds both v3 Expert via MALC and the Six Sigma Black Belt, the certification requirement is fulfilled. **Note:** A. Brown still needs 10 additional points from the Certification and Qualification lists – A. Brown can **NOT** use the prerequisite courses (e.g., ITIL[®] Foundation or any of the Capability/Lifecycle courses that were completed to achieve the necessary 22 credits for the ITIL[®] Expert or any of the other 'belts' in the Six Sigma schema lower than the Black Belt).

Approved Qualifications

Qualification	Point Value
Direct management responsibility for ITSM Process Area (ongoing operation)	2
Accountable for ITSM function, process and/or related implementation	3
Team Member for ITSM function, process and/or related implementation	2
Project Manager of ITSM Implementation	3
Accredited ITSM trainer	2
Examiner/Exam Development for ITSM certifications	2
Participation in ITSM Standards body	2
Professional Organization (<i>itSMF</i> , PMP, ISACA, etc...) officer (must serve full annual term)	2
Professional Organization volunteer/committee member (must serve full annual term)	1
Professional Organization National-level formal Award or Recognition	1
priSM or other professional association mentor	2
<i>itSMF</i> or ITSM-related conference/convention volunteer (must server full commitment)	1
Editor, Service-Management related book/text	2
Author (white paper, articles, reports in journals & related magazines, newsletters, etc.)	
• Newsletter article/magazine for professional organization (up to 5 articles)	2
• Newsletter article/magazine for professional organization (6-10 articles).....	4
• Article accepted to a refereed journal	4
• General white paper.....	1
• Published book (single author).....	7
• Published book (co-author).....	3
Speaker on ITSM at public events (conferences, seminars, workshops) or discussion leader, track chair	
• Local professional group meeting (per unique presentation); webinar.....	1
• Regional professional group meeting	2
• National/International professional group meeting	3
• Guest Lecturer.....	2
• Track Chair.....	2
Discussion leader or moderator at public events	1

Note: There are other courses, mentoring and volunteer roles in the IT industry that are not listed – from an initial review it was felt they were not related closely enough to Service Management. If an additional item should be included in this list, follow the Appeal process.

How to Document your Experience, Training and Activities for the Application

Three forms are used to document your experience and education:

1. **priSM** Calculator and Checklist form
2. Personal résumé/CV
3. **priSM** Supplemental CV Addendum form (if a résumé/CV is not available)

The **priSM Calculator and Checklist Form** was developed to assist you in determining which **priSM** level is most appropriate and to help you gather the required documentary evidence. Follow the steps below to complete your determine the correct credential.

- Download a copy of the **priSM Calculator and Checklist form** from the website
- Complete the form following the instructions included in the form
- As each section is completed, make a list and begin gathering the **documentary evidence** for each certificate/activity (e.g., copies of certificates, course schedules, etc...)
 - To help with the review process, label all evidence with the corresponding line number from the Calculator – this will speed the review process
 - Please note that a course may apply to only one certification requirement and that prerequisite courses used for certifications applied to the credential may **not** be used to satisfy the requirements for additional points.
 - To provide the necessary proof, photocopies are acceptable as are electronic files. If, the application is submitted electronically, ensure the file size is appropriate so the file is legible/readable (less than 1 MB/file please).
 - For ease of review, please create a **SINGLE** .zip file, if possible, that includes your application, résumé/CV, and necessary evidence
- Note the calculated level; save the completed copy

If a résumé or CV is not available, complete the **priSM Supplemental CV Addendum form**. The supplemental form asks for work experience, formal educational and professional training, and ITSM-related activities.

For example: *J. Smith used her ITIL® v2 Practitioner certifications to satisfy the base certification requirements for the Professional credential. The prerequisite ITIL® Foundation certificate cannot be included in the required six (6) points. However, other entry level certifications from other frameworks may be used to meet the requirements.*

Application Fees

To begin the application process, you must first join the **priSM** program and pay the credential fee. *itSMF* membership is required for participation in **priSM** (the *itSMF* member must be in good standing).

The fees are determined by credential level (see chart below):

Credential	Initial Fee			Renewal	
	A. <i>itSMF</i> Membership*	B. <i>priSM</i> Application Fee	Total (A+B)	C. <i>priSM</i> Renewal	Total (A+C)
Student	\$35	\$35	\$70	\$25	\$60
Associate	\$195	\$100	\$295	\$50	\$245
Professional	\$195	\$200	\$395	\$100	\$295
Distinguished Professional	\$195	\$400	\$595	\$200	\$395
Fellow	\$195	<i>Nomination Only</i>	\$195	\$100	\$295
Transfer from ISM/ICSM (any level) Available until 31 August 2011 ¹	\$195	\$50	\$245	<i>As listed above</i>	

*Annual membership in *itSMF* is a requirement for the **priSM** program – this table lists *itSMF* USA fees for example purposes only – please **substitute** your local Chapter's fee.

¹To transfer from ISM/ICSM, you must have been a member in good standing of ISM as of **1 February 2011** and of ICSM as of **15 July 2010**.

Grandfathering Institute of Service Management (ISM) and Institute of Certified Service Managers (ICSM) Members to priSM

priSM recognizes and welcomes members of ISM and ICSM. Members of ISM and ICSM (regardless of level), *who are in good standing*, can 'renew' their credential within the priSM qualification scheme. Review the grid below for the requirements. Understand with the new priSM credential, the priSM CPD requirements must also be completed on an annual basis to maintain the credential.

Institute of Service Management (ISM) Credential*	priSM Credential
Associate in ISM (AISM) plus one (1) certificate at the Associate level from the Approved Certification List	Associate
Practitioner in ISM (PISM) plus eight (8) points at the Professional level from the Approved Certification List	Professional
Member in ISM (MISM) without ITIL [®] v2 Manager (ITSMMC) or v3 Expert	Professional
Member in ISM (MISM) with ITIL [®] v2 Manager (ITSMMC) or v3 Expert	Distinguished Professional
Fellow in ISM (FISM)	Fellow

*To transfer to priSM, you must have been a member in good standing as of **1 February 2011**.

Institute of Certified Service Manager (ICSM) Credential**	priSM Credential
Associate of Service Management (ASM)	Associate
Professional of Service Management (PSM) plus one (1) additional certificate at the Professional level and four (4) additional points from the Approved Certification and/or Qualification List	Professional
Distinguished Professional of Service Management (DSM) (ICSM scheme: 1 certificate and 2 activities) plus one (1) additional certificate at the Distinguished Professional level and six (6) additional points from the Approved Certification and/or Qualification List	Distinguished Professional
Distinguished Professional of Service Management (DSM) (ICSM scheme: 2 certificates and 1 activity) plus eight (8) additional points from the Approved Certification and/or Qualification List	Distinguished Professional

To transfer to priSM, you must have been a member in good standing as of **15 July 2010.

To transfer into the priSM program:

1. Complete the appropriate level application based on the above grid
2. Submit the necessary additional documentary evidence (certifications and additional points), as required above
3. Submit the **priSM Transfer Application** with a copy of the ISM/ICSM certificate along with a check for the application fee. If you are not an itSMF member, please join your local chapter and remember to include your receipt showing date joined and expiration date.
 - a. **Note:** An 'extra' step may be required at some Regional Institutes due to processing tools.

Continuing Professional Development Overview

Once the **priSM** credential has been awarded, there is an annual minimum requirement for continuing professional development. The **Continuing Professional Development (CPD)** program supports the ongoing educational and professional development of individuals who have attained the **priSM** credential. The CPD program:

- Enhances the ongoing professional development of credential holders
- Encourages and recognizes individualized learning opportunities
- Offers a standardized and objective mechanism for attaining and recording professional development activities
- Ensures maintenance of **priSM** credential
- Sustains the global recognition and value of IT Service Management credentials.

Various activities are eligible to fulfill the professional development/continuing education requirements within each **priSM** credentialing level. The grid below defines the **annual minimum requirement**. Understand that not all scenarios can be fulfilled within a single statement – if there are activities that are not specifically defined, submit those activities to the **appropriate** Regional administration office (e.g., admin-americas@theprisminstitute.org, admin-emea@theprisminstitute.org, etc...) along with the Service Management justification, **30 days prior to participation**, for assessment. Individuals as well as groups (i.e., LIGs, new training courses, etc...) may submit an activity for assessment and inclusion to the CPD program. The procedures for submitting an activity is found at the end of this document in the section entitled, “Submitting Activities for CPDs.”

The CPD program is **not** just about training courses. As members of a profession, it is imperative that the members add to their profession – share the lessons learned from the practical experiences, expand on the body of knowledge through writing or presenting or mentoring and also challenge the core body of knowledge. The CPD program encourages these types of professional interactions. The **priSM** scheme has been designed to promote professional connections between colleagues in a variety of venues, encourage ongoing learning and to grow the profession by sharing our experiences, teaching others, and leading within the industry.

Please understand that the **priSM** Institute reserves the right to set the criteria for, and make decisions regarding acceptance of programs conducted by external providers for CPD credit. If you are requesting credits for items not included in the current listing, there is no guarantee that your credits will be accepted. A current and up-to-date listing will be maintained on the **priSM** website. If you request an exception, please ensure the updated list has been checked before submitting.

All CPD information/documentation submitted will be held a minimum of 18 months. A percentage of credential holders submitting supporting material will be randomly audited by the **priSM** Institute to verify submitted evidence.

Annual CPD Credit Requirements

	Annual Minimum (total)	Mandatory Credits
Student	10	
Associate	20	
Professional	40	6*
Distinguished Professional	52	12*
Fellow	44	24*

*These credits **must** come from the following areas: Authorship, Presenting, Volunteerism (APV); the remaining required credits may come from any area. For example, at the Distinguished Professional, 12 credits must be from the APV list and 40 credits can be from any other area (e.g., certifications, conference/meeting, SME activities or the APV list) for a total of 52.

Tracking CPD Achievements

To accurately track your CPD status, ensure the following is understood.

- Activities that are used to fulfill the initial credentialing requirement are **NOT** to be included in the on-going CPD calculations. Likewise, if you are planning to apply for a higher credential in the **priSM** program, you may not use the same activities for that application that you use to satisfy your continuing professional development requirements.
- CPD credits are **NOT** retroactive – all must be completed **AFTER** the credential has been awarded.
- CPD credits may **NOT** be duplicated -- only the higher number or credits for an event will be accepted. **For example**, J. Smith was the main speaker (6 CPD credits) and attended the entire LIG meeting (2 CPD credits). Smith would enter the 6 credits not 8.
- CPD credits can be carried forward ('banked') to the next calendar year. However, no more than **50%** of the annual requirement can be accrued and applied to the following years' requirement. **For example**, at the Professional level, no more than 20 CPD credits earned in the current year can be applied to the following year.
- APV credits may **NOT** be carried over to the next calendar year
- No carry-over credits may be applied to the APV requirement (PSM, DPSM, FSM only). **For example**, Jerry Smith, DPSM, earned 78 CPDs in 2010. He needed 52 with 12 CPDs from the APV categories. Of the 78 CPDs, 16 were APV credits. Analysis:
 - 2010 requirement has been met
 - He has 26 CPDs 'extra', all of which can be applied to 2011 (50% of 52 is 26)
 - For 2011, John will need to achieve 12 APV (no carryover) and an additional 14 CPDs (any category)

The math: 26 CPDs banked from 2010 + 12 APV credits for 2011 + 14 CPDs for 2011

CPD Credits:

Subject Matter Expert	Credits
Direct management responsibility for ITSM Process Area (ongoing operation)	3
Accountable for ITSM function, process and/or related implementations (maximum 2/year) (attach evidence; confirmed by reference)	12
Leading (responsible) improvement activities or new deployment of ITSM functions or processes (attach evidence; confirmed by reference)	12
Project Manager for improvement activities or new deployment of ITSM functions or processes (attach evidence; confirmed by reference)	12
Member of a process improvement/new process deployment team (attach evidence; confirmed by reference)	6
Exam Development for ITSM certification (per session; maximum 2 sessions/year) (attach evidence)	12
Participation in ITSM Standards body (per working session; maximum 2 sessions/year) (attach evidence)	12
Accredited ITSM Trainer – Foundation level (maximum 4 courses/year)	3
Accredited ITSM Trainer – Advanced level (maximum 4 courses/year)	6

Authorship	Credits
Newsletter article (online/print) for professional organization (up to 5 articles)	3
Newsletter article (online/print) for professional organization (up to 6-10 articles)	6
Refereed journal (per accepted submission)	24
General white paper (per paper)	6
Published book (single author)	42
Published book (co-author)	18
Editor, Service-Management related book/text	12

Conference/Meeting/Workshop/University Presentation	Credits
Local professional group meeting (per unique 'keynote' presentation)*	6
Regional professional group meeting (per unique presentation; may be an 'enhanced' local presentation) or half-day workshop**	12
National/International professional group meeting (per unique presentation) or full-day workshop*	18
Guest Lecturer (college/university-based program)	12
Track Chair (maximum 2/year)	12
Discussion leader or moderator at public events (maximum 2/year)	6

*Webinars are included here

**In-house work-related training is not applicable (e.g., software training, etc...)

Volunteerism	Credits
Professional Organization (<i>itSMF</i> , PMP, ISACA, etc...) officer (must serve full annual term)	12
Professional Organization volunteer/committee member (must serve full term) (maximum 12 credits/year)	6
National-level formal Award or Recognition	6
priSM or other professional association mentor	12

Conference/Meeting/Workshop Attendance*	Credits
45-75 minute lecture (e.g., conference sessions, mini-workshop, etc...)	1
75-120 minute lecture (e.g., conference sessions, keynote address, etc...)	2
½ day workshop (<i>pre-approve, submit for approval</i>)	3
Full day workshop (e.g., process design, simulation, etc...) (<i>pre-approve, submit for approval</i>)	6
<i>itSMF</i> Webinars ¹	1
Qualified <i>itSMF</i> IG Meetings	2
Other SM Interest Group Meetings (<i>pre-approve, submit for approval</i>)	TBD
<i>itSMF</i> and ITSM-related conferences (follow the above schema; priSM Passport, etc...)	TBD

*In-house work-related training is not applicable (e.g., software training, etc...)

Certifications	Credits
1-day Simulation Workshop	3
CMMI-based Process Improvement Overview	3
Implementing CMMI for High Performance, an Executive Seminar	3
ITIL [®] v3 Foundation	6
Foundation Certificate in ITSM according to ISO/IEC 20000	6
Information Security Management Foundation based on ISO/IEC 27002	6
MOF Essentials	6
COBIT [®] Foundation	6
CISA (ISACA)	6
Six Sigma White Belt	6
SFIA/BCS Foundation Level Certificate in Service Management <small>*Use v4.0 of the SFIA structure; courses that address levels 1 or 2 (Follow, Assist respectively) apply here</small>	6
PMI CAPM certification	6
PRINCE2 Foundation	6
HDI Support Center Analyst, Desktop Technician, Team Lead	4
HDI Support Center Manager, Desktop Support Manager, Director	6
SDI Service Desk Foundation	4
SDI Service Desk Analyst	6
SDI Service Desk Senior Analyst	4
SDI Service Desk Manager	8
KT ITSM Problem & Incident Management, Incident Mapping, Managing People in Projects	6

¹ Only those webinars for which attendance may be validated are accepted for CPD credits.

Certifications	Credits
KT Rational Process Mastery	12
KT Process Facilitator & Coach Certification	18
Knowledge-Centered Support (KCS) Fundamentals	3
Knowledge-Centered Support (KCS) Principles	6
ITIL [®] v2 Practitioner (IPAD, IPPI, IPRC, IPSR)	12
ITIL [®] v3 Lifecycle (SS, SD, ST, SO, CSI)	6
ITIL [®] v3 Capability (SOA, PPO, RCV, OSA)	12
Professional Level Certificate in ITSM according to ISO/IEC 20000 (Alignment, Delivery, Support, Control)	6
Professional Level Certificate in ITSM according to ISO/IEC 20000 (Manage & Improve)	12
Consultant Manager or Internal Auditor in ITSM according to ISO/IEC 20000	12
Service Catalog (complimentary v3 qualification from APMG)	6
CMDB (complimentary v3 qualification from APMG)	6
Change Analyst (complimentary v3 qualification from APMG)	6
ICT Infrastructure Management (ICTIM) (complimentary qualification from BCS)	18
Certified Process Design Engineer (CPDE) (complimentary v3 qualification from LCS)	12
Service Desk & Incident Management Specialist (complimentary v3 qualification from ISEB)	6
Service Level Management Specialist (complimentary v3 qualification from ISEB)	6
Change Management Specialist (complimentary v3 qualification from ISEB)	6
Problem Management (complimentary v3 qualification from ISEB)	6
BRM (complimentary v3 qualification from ISEB)	6
Supplier Management (complimentary v3 qualification from ISEB)	6
BS15000 Auditor or Consultant	12
ISO/IEC 20000 Auditor or Consultant (itSMF)	12
Information Security Management Advanced based on ISO/IEC 27002	6
ISMS Lead Auditor based on 27001	12
SFIA/BCS Practitioner Qualification *Use v4.0 of the SFIA structure; courses that address levels 3 or higher	12
Six Sigma Yellow Belt	18
Six Sigma Green Belt	24
CQE or CQA (ASQ)	12
CISSP ((ISC) ²)	12
CISM (ISACA)	12
CGEIT (ISACA)	12
CompTIA CDIA+, CTT+, Project+, Security+	12
PMI PMP or PgMP	12
PRINCE2 Practitioner	12
MBA, MA/MS or the equivalent (must be in a Service Management related field)	18
PhD, Ed.D. or the equivalent (must be in a Service Management related field)	24
ITIL [®] v1/v2 Manager's Certificate in IT Service Management (ITSM/ITSMC)	42
ITIL [®] v3 Expert via achieving the v2-v3 Manager Bridge	6
ITIL [®] v3 Expert via MALC (Managing Across the Lifecycle)	12
Executive Consultant or Lead Auditor Level Certificate in ITSM according to ISO/IEC 20000	24
KT Process Facilitator & Coach Certification	18

Certifications	Credits
SEI Certificate in CMMI	42
Six Sigma Black Belt	42
Six Sigma Master Black Belt	42
PMI-SP or PMI-RMP	24

How to Maintain the Credential

The credential begins the day the application is approved for a specific **priSM** credential level and ends one year later. **For example**, *J. Smith was accepted as a priSM Professional on April 1, 2010; the credential expires March 31, 2011.*

To maintain the current credential, the following must occur:

1. The required number of CPD credits must be logged within the year:
 - a. Utilize the online form (**priSM** CPD Submission Form) spreadsheet to submit the activities as they are completed. Instructions are included on the form.
 - i. Please note that any *itSMF* USA meeting for which you RSVP on the *itSMF* USA website will automatically be tracked against your membership and **priSM** records. You will not need to submit these separately as long as you sign in or register at the meeting.
 - b. CPD credits logged through the online logging system will be available for your review via the online transcript (**coming soon!**). Check your transcript frequently and follow up on any missing CPD credits.
 - c. We strongly suggest that all CPD forms and accompanying physical evidence is safeguarded as a backup to the online system.
2. Membership in *itSMF* and **priSM** must be renewed prior to the expiration. **For example**, *J. Smith would submit renewal fees before March 31, 2011 and insure that any new credits earned or credits that are missing from the online transcript are submitted by February 28th, 2011 (30 days prior to expiration).*

To advance the **priSM** credential, the following must occur:

1. A new application with the necessary documentary evidence must be submitted.
2. All CPD credits for the current level must be completed before the new application will be reviewed.
3. When to apply:
 - a. The most convenient way to apply for the next level is to do so at the anniversary of your current **priSM** credential, paying the fee and submitting the application for the next level in lieu of paying a renewal fee.
 - b. If waiting until your anniversary will create a hardship, you may apply early, paying the fee for the next level. Your anniversary date will remain the same, but your payment for the next level will be accepted in lieu of the renewal fee that would have come due at your

anniversary. In other words, you are paying in advance for the credential at the next level, in lieu of renewing at the current level.

For example, J. Smith wants to move to the Distinguished Professional level. A new application is submitted on January 5, 2011. The credential expiration date is March 31, 2011. J. Smith would submit both itSMF fees and the new **priSM** fee (\$595). The itSMF membership and **priSM** credential expiration date would now be **March 31, 2012**.

How to Apply for a priSM Credential

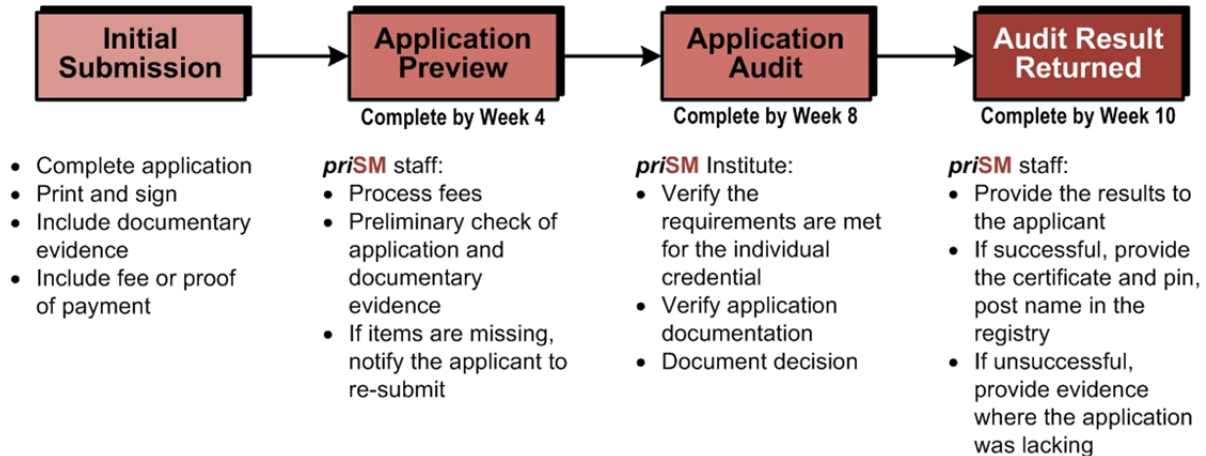
The time to complete the **priSM** application process will depend mostly on the time it takes to gather the required materials and documentary evidence. The list below provides the steps and a high-level time estimate:

1. Review this **priSM** Handbook..... 30-45 minutes
2. Determine your **priSM** level..... 15-30 minutes
 - Download the **priSM** Calculator and Checklist Form from the website.
 - Complete the form, following the instructions inside the document. When you have completed the form, you will see the appropriate **priSM** credential level at the bottom of the form.
 - **Save the results**; you must submit it as part of the complete application package
3. Gather documentation..... 30 minutes – 2 hours
(depending upon the level applied for and the organization of your documentary evidence.)
 - This is the time-consuming step – be prepared to spend some time finding the correct documentary evidence, creating electronic/hard copies and then bundling for submission
4. Online fee payment..... 15 minutes
 - See the detailed steps for online registration and payment below – remember, you must be a member of *itSMF*
 - Save a copy of the receipt (receipt should show date of expiration) and include it in the final application package
 - If you choose to pay by check, the check must be included in the application package (submit via the postal system) – the application will not be reviewed until the check has been processed
5. Obtain professional reference 15 minutes
 - Download the **priSM** Reference Form or **priSM** Student Sponsorship Form and send it to your professional reference to complete and **return to you**
6. Complete the application 30-45 minutes
 - Download the appropriate application from the website and complete all sections
7. Submit the completed application and required documentation 15-30 minutes
 - Submit via email, fax or post using the information listed in the application
 - Documents included in the application package:
 - Application form
 - Copy of paid receipt for **priSM** fees and *itSMF* membership
 - Copy of **priSM** Calculator and Checklist form
 - Résumé or **priSM** Supplementation CV Addendum form
 - Completed **priSM** Reference or Student Sponsorship form
 - Documentary evidence (e.g., certificate copies, transcripts, etc...)

Note: no application will be processed until payment is received!

If you need assistance with any of the steps above, please contact the appropriate Regional **prISM** Administrator via e-mail (see contact information on page 2).

The diagram below illustrates the review process and timeline. The application review process is to be completed within a 10-week period.



Appeal Process

To appeal a course or activity listed in the Certification, Qualification or CPD tables, submit course or activity information (as complete as possible, e.g., website, syllabus, description, etc...) to the Regional **prISM** Institute administrator (see page 2 for contact information). The **prISM** Institute will review and update the online listing and Handbook as needed.

To appeal a credential, notify the Regional **prISM** Institute administrator (see page 2 for contact information). Be sure to be as complete as possible in your inquiry so that the **prISM** Institute may fully understand and expedite the request. All responses will be made via email/post as quickly as possible.

Credential Terms of Use

If the application audit results indicate that the requirements for the selected credential were not met, two courses of action may result:

1. You may be accepted at a lower level and notified of this decision. In this case, a refund will be issued for the difference in cost between the two levels; **or**
2. Your application may be put on 'hold' as additional information/documentation becomes necessary to clarify and fully assess the application (i.e., upon review, experience or related activities may require further clarification). You will be notified and you may choose to provide the necessary additional information **or** you may formally accept a lower credential (if requirements are met). If you choose to provide additional information, you have one (1) year to fulfill the requirements and resubmit without incurring additional fees. You may **NOT** use the **prisM** designator during this period.

After one (1) year, renewal fees will apply. There are no refunds if an applicant decides they are not interested in pursuing the credential.

Credential Status

Active Status

Once the credential has been awarded, the status of the credential is 'active.' All active credential holders will be listed within the Online Registry. To maintain an active status, the CPD and renewal requirements must be met before the end of the credential year. Once the CPD requirements have been met, a notification will be sent as a reminder to submit all renewal fees. If the CPD requirements have not been met, the status of the credential becomes 'suspended.' Membership in itSMF **must** remain current to maintain an 'active' credential status.

Suspended Status

If the requirements of the CPD program are not satisfied within the certification dates, the credential moves to a suspended status. While the credential is suspended, the holder must remove all reference to the credential or credential designation(s) until the deficiencies have been removed.

***For example,** J. Smith achieved 29 of the required 40 CPD credits at the Professional Level in the credential year. The status for this credential becomes "Suspended." To regain an active status, J. Smith must complete the necessary 11 CPD credits in the next calendar year (as well as that year's requirements for a total of 51).*

The CPD cycle date will not change after reinstatement to active status from suspended status. If the requirements are not met during the suspension period, the credential is withdrawn. To regain the credential, a new application must be submitted with full fees (not the renewal fees).

Governance Ethics and Conduct

All **priSM** credential holders are required to read, sign and agree to the *itSMF* Code of Ethics, which provides the integrity base for the program. Credential holders may also be subject to complaint if they violate the Code of Ethics. Such complaints may be submitted to *itSMF* International by other members/credential holders, the **priSM** Global/Regional Institute (for items like falsification of information or documents used to apply to the program), the *itSMF* Board of Directors or other entities working with our organization.

The table below provides links to the Code of Ethics documents within *itSMF* as well as documents detailing the complaint review process, etc... The documents, found at www.itsmfi.org include:

- *itSMFI* Member Code of Ethics
- *itSMFI* Leader Code of Ethics
- *itSMFI* Member Ethics Review Process
- *itSMFI* Code of Ethics Violation Complaint Form

Use of Your priSM Credential

Once you receive **priSM** credential level approval, you are granted the **priSM** credential. As long as you maintain your **priSM** credential in an “active” status, you are authorized to use the **priSM** credential level designation (e.g., **SSM**[®], **ASM**[®], **PSM**[®], **DPSM**[®] and **FSM**[®]) in block letters after your name on business cards, personal letterhead, résumés, websites and in your e-mail signature. Misuse of the credential level designation is a violation of the *itSMF* Code of Ethics and may result in permanent loss of membership in both **priSM** and *itSMF*.

Included in the Credential Package are:

- Congratulatory letter
 - Includes credential renewal date
- **priSM** Credential certificate
 - Includes the credential number (unique identifier used to maintain individual records)
- **priSM** Credential Pin for the approved level
- **priSM** Credential Logo (example below) for the approved level (may be used on business cards, personal letterhead, websites and in your e-mail signature)





priSM Credential Application/Renewal Agreement

Ninety days (90) **before** the credential expires, you will receive a reminder of your **priSM** credential expiration date. It is imperative that you begin to review the status of your CPD credits, supplying the documentary evidence for any missing credits to the **priSM** Institute. The deadline for providing such documentation in order to have it entered into the system by the time of your final renewal is thirty (30) days prior to renewal.

You must also renew your **priSM** credential and pay the renewal fee prior to the termination date. Simply log onto the **priSM** website and renew online. At this printing, you may only pay via credit card. Note we are working on a more comprehensive accounting system and functionality of the website may change before this documentation is updated. Please check the website.

Please bear in mind that your anniversary is an excellent time to consider applying to a higher level of **priSM** credential. If you are interested in doing so, please follow the instructions provided earlier in this handbook.

Submitting Activities for CPDs

The **prISM** Institute wants to help you and/or your group (e.g., Local or Regional Interest Groups – IGs, chapter meetings, etc...) attain all of the CPDs possible through attending professional, service management-based meetings (in-house, organizational-based training does not apply). To guarantee these CPDs, please follow this process to qualify your agenda for points.

Step 1: Submit your Meeting Agenda to the **prISM** Institute by email

- **Are you an itSMF Interest Group?**
 - Submit your meeting agenda (use the **prISM** Qualification form) to the **prISM** Institute at least 30 days in advance of the meeting. This submission will start the process.
 - Include any of the following: agenda, activities, syllabi, informational flyer, etc... for the event
 - Indicate the speakers for the events and what qualifications they bring to the presentations
- **Are you an individual prISM credential holder?**
 - Are you going to an itSMF Interest Group meeting?
 - **Yes:** Chances are that the IG officers have already submitted this event for CPD credit.
 - If you are attending an Interest Group meeting that has already submitted for CPDs – you are done! They will collect your name and **prISM** information at the event and do the submission for you!
 - Otherwise, submit the IG's meeting agenda to the **prISM** Institute as soon as you decide to attend. You should be able to email the link from the IG's website.
 - **Note:** The **prISM** Institute understands that Service Management is not strictly limited to the itSMF. The **prISM** Institute acknowledges the value provided by many other groups the work in Service Management as well.
 - Are you going to another group's meeting or event?
 - The **prISM** Institute is prepared to award CPDs for attending similar events held by organizations such as ISACA, PMI, Six Sigma and others. The only stipulations are this event must pertain to Service Management and it may not be substantially a marketing or sales presentation.
 - Submit the meeting agenda to the **prISM** Institute as soon as you decide to attend. (The earlier, the better.) If possible, email this in the form of a web link describing the group's event or meeting.
 - Include any of the following: agenda, activities, syllabi, informational flyer, etc... for the event.

Step 2: At the Event

- **Are you an itSMF Interest Group?**
 - Publicize your event to your membership as a meeting with CPDs
 - As part of your sign-in procedures, collect the **priSM** status information from your attendees
 - Submit this information to the **priSM** Institute so that CPDs may be awarded
- **Are you an individual priSM credential holder?**
 - Ask your IG leadership if they are submitting this meeting for CPDs
 - If they are – sit back, relax and enjoy the meeting. You are done.
 - If not - Submit the meeting agenda to the **priSM** Institute as soon as you decide to attend. (The earlier, the better.) If possible, email this in the form of a link to the IG's web site.
 - If possible, include any of the following: agenda, activities, syllabi, informational flyer, etc... for the event.

Step 3: Review by **priSM** Institute Professional Development Committee

- **Are you an itSMF Interest Group?**
 - As soon as possible, submit the presentation in PowerPoint or PDF form to the **priSM** Institute for review and documentation purposes. *30 days prior to the event is best!*
 - Because **priSM**'s primary interest is the professional development of its members, these presentations will be reviewed for content.
 - Interest Group meetings are driven with the practitioners in mind
 - Presentations containing more than 5% sales or marketing content *will not* qualify for the CPD program
 - CPDs **will not** be awarded for a product showcase
 - CPDs **will** be awarded for presentations on innovation, conformance, guidance and contributions to the practice of Service Management
- **Are you an individual priSM credential holder?**
 - Because **priSM**'s primary interest is the professional development of its members, these presentations must be considered for content.
 - The information you submitted will help the Professional Development Committee decide how to award CPDs. The more you provide, the easier and faster the decisions are to make.
 - You might even become the bridge between the **priSM** Institute and that group

Step 4: Result of the Review

- **Are you an itSMF Interest Group?**
 - The **priSM** Institute would prefer to approve the CPDs **prior** to your event. This happens when the Interest Group submits the PowerPoint or PDF presentation to the **priSM** Institute early enough for review. *30 days prior to the event is best!*
 - We understand that this is not always possible: agendas change or speakers cannot write their presentation in time. In such a case, the **priSM** Institute will notify the IG as soon as possible if there are any issues.

- With the decision, the **prISM** Institute will update the online records of the credentialees in attendance based on the Interest Group's submission report.
- If for any reason, the CPDs are refused by the **prISM** Institute's Professional Development Committee, the **prISM** Institute will provide you with a written explanation as to why this program was not appropriate to award CPDs.
 - An escalation/re-review process exists
- **Are you an individual prISM credential holder?**
 - Because **prISM**'s primary interest is the professional development of its members, these presentations must be considered for content.
 - The information submitted will help the Professional Development Committee decide how to award CPDs. The more information provided, the easier and faster the decisions are to make.
 - You might even become the bridge between the **prISM** Institute and that group
 - The **prISM** Institute staff will update your CPD record
 - If for any reason, the CPDs are refused by the **prISM** Institute's Professional Development Committee, the **prISM** Institute will provide a written explanation as to why this program was not appropriate to award CPDs
 - An escalation/re-review process exists

Step 5: Escalate for Re-review of Rejected CPDs

- **For both itSMF Interest Groups and individual prISM members.**
 - If the **prISM** Institute has rejected the submission for CPDs and you feel it is appropriate, please submit additional information and/or justification to clarify via the Appeal process
 - The **prISM** Institute will review its previous decision to understand the "why" behind the refusal
 - The **prISM** Institute will make and document its new decision
 - Where appropriate, evidence will be documented
 - A new and final decision will be made and communicated
 - No further escalation is possible
 - Where appropriate, the CPD accounts of all involved credential holders will be updated for the event in question