

## ERM FAQ Sheet

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# ERM FAQ Sheet

## 1Q: My organization's hierarchy/structure is inaccurate. How do I get it corrected?

**1A:** The hierarchy in CROSS is auto populated from DON TRACKER, which is primarily a task management system. The org structure is NOT tailored to records management. In some cases, the command structure is too comprehensive; in other cases, it is not comprehensive enough. It is the responsibility of the CDRM to ensure that the org structure in CROSS is an accurate reflection of day to day RM practices.

Is the organizational structure in the subsection list correct? ☒ No

Upload Correct Org Structure  
(.xlsx or .docx preferred):

Filename	Upload Date
<div>Save NJDA Setting</div> <div>+ Add Org Hierarchy File</div>	

On the CROSS homepage under the **Organizational Info** tab, there is an option which says: *"Is the organizational structure in the subsection list correct?"* Toggle this to "No." An option will appear to **"Add Org Hierarchy File."** Upload your correct org structure here.

## 2Q: How do I delete users that are no longer in my organization?

**2A:** Currently, CDRMs cannot delete users. If you wish to have users removed from your organization, submit a request to the ARDB Helpdesk via the **Contacts** email box at the bottom left of the CROSS homepage. Please submit your unit name and ID, along with justification for why the user should be removed.

## 3Q: How do I change my role within CROSS?

**3A:** If you wish to change your role (ex. from primary CRDM to alternate CDRM), please submit a request to the ARDB Helpdesk via the **Contacts** email box at the bottom left of the CROSS homepage. Please include the role you would like to switch to.

[Contacts](#)

You can send an email directly by providing an email body below, and checking the requested recipients:

Tech and Help Desk Support ☐ Selected RMs ☐

## 4Q: I've moved to a different organization. How do I change my unit?

**4A:** Select your name (in blue) next to **"Current User"** in the top right-hand corner of the dashboard.

Name \*  
Bastien Ctr Talia

Role \*  
Primary Unit CDRM

Region \*  
Northeast Region

You have listed the following as your unit: \*  
HQMCM, AR, ARDB - RECORDS, REPORTS, DIRECTIVES & FORMS  
MANAGEMENT SECTION "LEVELS"

[Click to change units](#)  
(Changing units will require a new appt letter from your new unit)

Version: 5.0  
Created at 12/9/2019 6:01 PM by Bastien Ctr Talia  
Last modified at 12/11/2019 12:47 PM by Workflow on behalf of Van Corbach CTR Andrew J

Email \*  
talibastien@hartwoodcg.com

Phone Number \*  
571-628-7711

Installation \*  
Pentagon (Other NCR), Washington, D.C.

SUPPORT

Current User: [Bastien Ctr Talia \(Click to Edit\)](#)

An edit user box will appear on the screen. Select **"Click to Change Units"** and type in the organization you are looking for. Click outside the box until you see the organization listed in **red** and hit save.

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You have listed the following as your unit: \*

HQMC\_AR\_ARD\_ARDB - RECORDS, REPORTS, DIRECTIVES & FORMS  
MANAGEMENT SECTION \*LEVEL5

Click to change units

(changing units will require a new appt letter  
from your new unit)

Find your unit: \*

418: HQMC\_AR - ADMINISTRATION AND RESOURCE

The following are the RMs listed for your organization:  
(If none listed, an RM is not assigned to your unit)

Please ensure that the list below represents your direct hierarchy  
structure above your unit.

418: HQMC\_AR - ADMINISTRATION AND RESOURCE  
MANAGEMENT DIVISION

Version: 5.0

Created at 12/9/2019 6:01 PM by Bastien Ctr Talia

Last modified at 12/11/2019 12:47 PM by Workflow on behalf of Van Corbach CTR Andrew J

Save

Cancel

## 5Q: I cannot find my unit, what should I do?

**5A:** If you cannot find your unit using its short name (i.e. MCCDC, ARDB, MCESG etc.), try spelling out the long name (i.e. Marine Corps Combat Development Command). You can also search by unit ID if you happen to know someone who already belongs to that unit.

RMs for 463: HQMC AR ARD ARDB - RECORDS, REPORTS, DIRECTIVES & FORMS MANAGEMENT SECTION \*LEVEL5

Click to View Your Organizational Structure

Find your unit: \*

463: HQMC\_AR\_ARD\_ARDB - RECORDS, REPORTS X

The following are the RMs listed for your organization:  
(If none listed, an RM is not assigned to your unit)

If you still cannot find your unit, please contact the ARDB Helpdesk via the **Contact** email box at the bottom left of the CROSS homepage.

## 6Q: Why can't I see/edit my file plan?

Organizational Info IG Self-Checklist **CMD/Secl File Plan**

### File Plan

\*\*\*ARDB is no longer accepting Excel/Spreadsheet file plans.  
Please use the file plan generator below to track which Record Schedules are being used\*\*\*

PPO\_PS\_PSH\_MCESG - MARINE CORPS EMBASSY SECURITY GROUP

Search for Bucket by Topic:  Search

Bucket	Topic	SSIC
Schedule #	Title	Itemized by SubOrg
Click the blue title to view DESCRIPTION	Click the blue SSIC links below to view DISPOSITION	Click the blue "SSIC" below to view corresponding SSICs to the Schedule #

**6A:** If you cannot see and/or edit your command file plan, it is because you are in the command level of your organization. Commands do not produce records – their file plan is comprised of a “roll up” of their subordinate staff sections. (Ex. *The S-3 produces records on behalf of the battalion*). If you wish to manipulate your command file plan, select a subsection (in blue) and the file plan for that section will appear.

### File Plan

\*\*\*ARDB is no longer accepting Excel/Spreadsheet file plans.  
Please use the file plan generator below to track which Record Schedules are being used\*\*\*

PPO\_PS\_PSH\_MCESG\_ADJ (MCESG ADJUTANT)

Search for Bucket by Topic:  Search

Bucket	Topic	SSIC
+ PPO_PS_PSH_MCESG_ADJ (MCESG ADJUTANT)		
+ PPO_PS_PSH_MCESG_FINANCE (MCESG FINANCE)		
+ PPO_PS_PSH_MCESG_S-3 (MCESG S-3)		

Save Changes to File Plan Print FilePlan

### File Plan

View All

Schedule #	Title	Itemized by SubOrg
Click the blue title to view DESCRIPTION	Click the blue SSIC links below to view DISPOSITION	Click the blue "SSIC" below to view corresponding SSIC to the Schedule #
1000-1	Policy, Strategy, and Planning	SSIC
Stored Format: None	Records Location(s):	
Exclusion/Additional Comments:		
1000-2	Official Military Personnel File (OMPF):	SSIC

010 3/15/21

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### 7Q: Can I register to more than one organization at a time?

**7A:** No. We are currently working on functionality to make this possible, but as of right now you are only able to align your profile to one role/section at a time (i.e. you cannot be both the CDRM and the staff section RM for the S-1.)

### 8Q: What is MCTILM?

**8A:** MCTILM (Marine Corps Tool for Information Lifecycle Management) is a configured SharePoint solution that ascribes metadata to records. It identifies a record's author, the record schedule (formerly SSIC) it belongs to, and a disposition date [**note: SSICs are used for content categorization (Navel Letter Format) but are no longer used to determine a records disposition.**]. Additionally, it disposes of records via an automated workflow, alleviating the need for records managers to go in and manually dispose of/retire records.

### 9Q: How do I get my command started on MCTILM?

**9A:** To build MCTILM, your organization must meet several prerequisites. **Note: you cannot configure MCTILM until you have a complete RM program established in CROSS.** 1) You must have an identified CDRM for your organization. 2) You must have a complete and accurate organizational structure in CROSS. 3) You must have 100% of your staff sections RM personnel identified. 4) You must have a **complete** file plan built in CROSS. 5) Your organization must have a thorough and comprehensive standard operations procedure dictating how to implement electronic records management—templates are available in CROSS. 6) Finally, you must identify your Site Collection Administrator (SCA). This will be the technical POC (generally someone from your S-6/G-6) responsible for the content control, permissions, and maintenance of your local Sharepoint.

Contacts

You can send an email directly by providing an email body below, and checking the requested recipients:

Tech and Help Desk Support	<input type="checkbox"/>
Selected RMs	<input type="checkbox"/>

Send Email

Once these prerequisites are met, please contact us at [smb\\_hqmc\\_rmoutreach@usmc.mil](mailto:smb_hqmc_rmoutreach@usmc.mil) or utilize the Contacts box at the bottom left of the CROSS homepage, and we will work with your SCA to configure MCTILM for your command/organization.

### 10Q: Do Staff Section RMs need an appointment letter?

**10A:** No. Per current policy, only the primary Command Designated Records Manager (CDRM) is required to have an appointment letter. However, this is the commander's prerogative. Staff Section

RM appointment letters may be approved by the CDRM in CROSS.

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## 11Q: How do I view the IG Self-Checklist?

**11A:** The automated IG Self-Checklist tab (below) is only available to commands with Non-Judicial Disciplinary Authority (NJDA). CDRMs and Program Owners no longer have the ability to adjust their NJDA status under the Organizational Info tab (see 19Q). Commands may submit a request to change their NJDA status via the Tech and Help Desk Support box at the bottom left of their CROSS homepage. When a command has their NJDA status approved by the help desk, the IG Self-Inspection checklist tab will become available.

All CROSS users have access to the **File Plan** tab, but only subsections have “view” and “edit” permissions. Subsections’ file plans “roll up” to the command element above them.

Sub Section	Compliance / Comments
101	Compliant
Compliant based on Appt Letter Expiration Date	
102	Findings
Overdue Training. A training document must be uploaded each calendar year.	
103	Findings
SOP review and upload must be completed each calendar year	

## 12Q: I went to save my file plan and the homepage timed out, erasing all my changes. Why did this occur?

**12A:** The platform on which CROSS is hosted (EIS) refreshes every 5 minutes or so. This issue is beyond our control. Please save early and often in order to mitigate the loss of work.

## 13Q: What is the difference Primary/Alternate CDRMs and Staff Section RMs?

**13A:** Each role has varying responsibilities:

**Primary CDRMs** are the Records Management (RM) POC for the command/organization they represent. They are responsible for implementing RM on behalf of their commander/organizational head while serving as the ARDB liaison for all things RM. Their responsibilities include:

1. Updating all organizational information (i.e. Commanding Officer, Capstone info etc.)
2. Reviewing the IG Self-Checklist for RM compliance on behalf of organization
3. Overseeing the completion of their organizational file plan
4. Creating, reviewing, or updating their organizational SOP (Standard Operating Procedure), as required per question 0103 of the 5210 IG Checklist
5. Overseeing their organization’s RM training and uploading training verification (i.e. rosters, certificates, MCTMS print out, etc.) to CROSS annually
6. Auditing subordinate section’s RM program(s)/file plan(s)
7. Ensuring that each section has appointed Staff Section RMs
8. Serving as the appointment letter approving official for Staff Section RMs

**Alternate CDRMs** assist Primary CDRMs in the same capacity and act as a secondary POC in the event of turnover. They utilize the same permissions as the Primary Unit CDRM. No more than three Alternate Unit CDRMs are needed at major commands.

**Staff Section RMs** are responsible for identifying and managing the records that belong to their respective section as well as annotating their file plan in CROSS. They are responsible for:

1. Creating a file plans *for their section*

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### 2. Communicating with their CDRM regarding RM compliance

**14Q: I am unable to register in CROSS/my email is not showing correctly/CROSS keeps telling me to re-register. What should I do?**

**14A:** CROSS pulls the email directly associated with your CAC. If all things are working correctly, the two boxes at the top of the registration form will auto-populate your information and be grayed out (non-editable). This indicates that CROSS has successfully pulled the data directly linked to a user's CAC (name and email address).



The screenshot shows two input fields for registration. The first field is labeled 'Name \*' and contains the text 'Van Corbach CTR Andrew J'. The second field is labeled 'Email \*' and contains the text 'andrew.j.vancorbach.ctr@usmc.mil'. Both fields are grayed out, indicating they are non-editable.

If one or both data elements do not appear, contact the HCS (formerly MCEITS) Help Desk at: (816) 705-4865 or [EISHelpDesk@usmc.mil](mailto:EISHelpDesk@usmc.mil) using the email template (below).

If you continue to receive a registration error/loop:

**Step 1:** Contact ARDB CROSS Site Support ([smb\\_hqmc\\_rmoutreach@usmc.mil](mailto:smb_hqmc_rmoutreach@usmc.mil)) to notify them of the failed registration attempt. The Helpdesk will delete your account to avoid duplication:

**Step 2:** Use the email template below to contact the HCS (formerly MCEITS) Help Desk:

To: [eshelpdesk@usmc.mil](mailto:eshelpdesk@usmc.mil)

Cc: [tiffany.gianquinto@usmc.mil](mailto:tiffany.gianquinto@usmc.mil)

[Greeting],

*I am reaching out to request assistance with my email address within the HCS Active Directory. I am registering to the CROSS website which relies on email address for validation and registration. I need to verify that the HCS Active Directory contains my email address and that it is current. Thank you for your assistance.*

[Signature]

**Step 3:** Once a reply has been received from the HCS Help Desk with conformation of account correction, attempt to re-register to CROSS at <https://eis.usmc.mil/sites/CROSS>.

**Step 4:** Contact ARDB support staff from **Step 1** to confirm CROSS access.

**15Q: How do I change my rank in CROSS?**

**15A:** You will need to contact the HCS (formerly MCEITS) Help desk: (816) 705-4865 or [EISHelpDesk@usmc.mil](mailto:EISHelpDesk@usmc.mil).

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**16Q: I submitted an account request for CROSS, but it has not been approved. What should I do?**

**16A:** The approving authority is different for each role in CROSS (i.e., primary/alternate CDRM or Staff Section RM). Primary/Alternate CDRMs are approved by the organization's commanding officer, section head, or other delegated authority (i.e. Executive Officer, Chief of Staff). Section RMs are approved by the organizational CDRM. **All approving authorities must have a prior existing MCEITS account (sharepoint access) with a CORRECT email address in order to receive and approve/deny your registration request.** If your approving authority does not have a MCEITS account, they will first need to create one, utilizing the **"RM MCEITS Account Request Guide,"** which is available for download on the ARDB website: [Records Reports and Directives Management \(marines.mil\)](https://marines.mil/Records-Reports-and-Directives-Management)

**RECORDS MANAGEMENT RESOURCES**

**MARINE CORPS BULLETIN**

Name	Description	Resources
MCBUL 5210	Marine Corps Transition to Electronic Records Management (ERM)	<a href="#">Link</a>

**QUICK SERIES GUIDE**

Quick Series Guide contain Electronic Records Management responsibilities for Commanders, CDRMs and Staff Section Record Managers

Name	Description	Resources
Quick Series - Commanders	Quick Series Guide on Electronic Records Management for Commanders	<a href="#">Download</a>
Quick Series - CDRMs	Quick Series Guide on Electronics Records Management for CDRMs	<a href="#">Download</a>
Quick Series - Staff Section RMs	Quick Series Guide on Electronic Records Management for Staff Section RMs	<a href="#">Download</a>

**CROSS**

CROSS is a SharePoint tool designed to provide support to Command Designated Records Managers (CDRMs) in the development and maintenance of Records Management Program.

Name	Description	Resources
MCEITS Account Request	Prior to gaining access to CROSS, all users MUST have a MCEITS account (now called HCS account)	<a href="#">Download</a>

**17Q: I am unable to view anything within the "Search CROSS Articles and Documents" feature. What should I do?**

**17A:** We are aware that a small percentage of our users are unable to utilize the drop-down feature. Selecting the link entitled *"Click here to view Document Library in list view"* will redirect end users to a list of all CROSS resources and materials. **Please do not add anything to this list!**

Search CROSS Articles and Documents

[Click here to view Document Library in list view.](#)

Select...

Title

Uploaded

Name
AISSICCrosswalk
ARD MCTILM Project Plan
Audit Report Template
Chapter 01 - Military Personnel
Chapter 02 - Telecommunications and Information Technology
Chapter 03 - Operations and Readiness
Chapter 04 - Logistics
Chapter 05 - General Administration and Management
Chapter 06 - Medicine and Dentistry
Chapter 07 - Financial Management
Chapter 08 - Ordnance Material
Chapter 09 - Ship Designs and Material
Chapter 10 - General Material
Chapter 11 - Facilities and Activities Ashore
Chapter 12 - Civilian Personnel
Chapter 13 - Aeronautical and Astronautical Material
CROSS FAQ
DIRECTIVES REVIEW PROCESS WORKFLOW 01NOV2017
Essential Records Fact Sheet
Essential Records Plan
How to use the Crosswalks
MCO 5215.1K (MC Directives Mgmt Prgrm)
Monthly Audit Report
NA FORM 13170 - ARCIS Application
NAVMC 11786 Instructions
NAVMC 11786



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**18Q: My organizational leader/section head does not have Non-Judicial Disciplinary Authority (NJDA)? Do I still need a records management program?**

**18A:** Yes. Every command or organizational command equivalent (i.e. HQMC program office, M&RA, etc.) in the Marine Corps is required to have a records management program (i.e. appointed CDRM, SOP, training etc.), regardless if their commander or organizational head has “NJDA” authority.

*Ex. HQMC\_AR Division is provided as an example. While their Director does not have NJDA, as a HQMC program office, he/she is responsible to implement a RM program across AR Division’s subordinate sections.*

**19Q: My command information (i.e. Training, SOP, Commander, Capstone info) disappeared; how do I get it back?**

**19A:** The ability to select the NJDA toggle was removed from the Organization Info tab in order to prevent Staff Section RMs from adjusting their command statuses and losing their file plan edits. All adjustments must now be made on the back end. If you are NOT a command or organizational command equivalent—such as a supporting staff section (i.e., S-3, G-2, SJA etc.)— you will no longer have access to the IG Self-Checklist Tab or the “editable” information under the Organizational Info Tab. Requests to change your unit’s NJDA status may be made via the “Tech and Help Desk Support” box at the bottom left of the CROSS homepage. Please provide your unit ID when contacting the Help Desk.

**20Q: There is no RM annual training available on Marine.Net. How does our command meet this requirement?**

**20A:** To meet RM annual training requirements, civilians, contractors, and Marines with access to Total Workforce Management System (TWMS) should take “Records Management in the DON: Everyone’s Responsibility” via <https://twms.dc3n.navy.mil/my.policy>. For those without access to TWMS, utilize the Power Point presentation available on CROSS, “Records Management, Everyone’s Responsibility.” To track training completion, commands should create an annual training occasion in MCTIMS (Marine Corps Training Information Management System) and upload a printout/pdf to CROSS. CDRMs can also maintain all training rosters in CROSS, if necessary.

**21Q: Did Record Schedules replace SSICs/Have SSICs gone away?**

**21A:** No. SSICs will continue to identify a record’s content or subject matter and should be placed in the upper right-hand corner for Naval Letter Correspondence purposes. Formerly, SSICs also determined a record’s disposition, resulting in over 6,000+ dispositions. Now, DON Record Schedules categorize, or group, SSICs into “buckets” to narrow the list of potential dispositions to about 712. Follow the steps below to determine a record’s disposition and how to determine which record schedules to include in your file plan:

Utilize the “AllSSICCrosswalk V1.1” document, available on CROSS under “Search CROSS Articles and Documents,” for the entire Crosswalk process.

**Step 1:** Column D features paragraph descriptions that fall under each four to five-digit SSIC (formerly found in SECNAV 5210.1 [2007]). Utilize Column D to determine the SSIC subparagraph that most closely matches the content or subject of your record.

**Step 2:** Utilize Column A to assign your record’s SSIC.

**Step 3:** Utilize Column B to determine the assigned Record Schedule (or Bucket) to your SSIC.



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**Step 4:** Utilize Column E to determine the disposition of the assigned Record Schedule.

**Step 5:** Include this Record Schedule in your section file plan in CROSS.

*Note: Crosswalks available on CROSS are subject to change by the Department of the Navy. The “AISSICCrosswalk V1.1” document compiles all 13 Record Schedule Chapters, for convenience of use and search when developing a file plan, from the SECNAV Portal [here](#).*