

USMC Records Management



QUICK SERIES: FOR COMMANDERS

The landscape of United States Marine Corps (USMC) Records Management (RM) is rapidly evolving to embrace a 21st century solution. It is incumbent upon Commanders, and their delegated authorities, to ensure a successful migration from textual (hardcopy) records to electronic records management (ERM).

Responsibilities: It is the responsibility of the Commanding Officer (CO) to ensure that every record is maintained throughout its lifecycle in full compliance with Department of Defense (DoD), Department of Navy (DoN), and USMC policy. COs must also appoint a Command Designated Records Manager (CDRM) in the rank of E6 or above (or its civilian GS equivalent).

Related Quick Series: CDRMs, Staff Section RMs, CROSS End User Guide, CROSS Slick Sheet

Why Does My Role Matter?

Historically, RM has been a collateral duty associated exclusively with S-1 or the G-1. While policy has changed to emphasize a more command-centric focus, internal business practices have not. As the CO, you have the ability to influence your command's priorities of effort and provide your CDRM with the support they need to ensure a successful ERM migration.

As the Marine Corps continues to operate in an increasingly digital information environment, RM will require closer scrutiny than ever before (i.e., Freedom of Information Act, Department of Justice Inquiries, etc.) The Marine Corps is implementing a three-phased approach in an effort to transition successfully to ERM.

These phases are: Command Records Operational Support Site (CROSS), Marine Corps Tool for Information Lifecycle Management (MCTILM), and a future long-term ERM solution currently pending decision at HQMC. When combined, these systems have the capability to reduce time spent on RM to less than four hours per month—that's more time dedicated to the mission!



WHAT YOU NEED TO KNOW:

Records are created across every MOS and throughout every facet of the Marine Corps. It is not just an "admin" or "S-1" function! Everyone—regardless of rank or billet—handles records, which means everyone is obligated to manage and dispose of them according to federal mandates (i.e., Every staff section requires a records manager).

The key to a successful RM program is knowing what records you have, where they are located, and how long they must be retained.



REMINDER:

Your command's administrative readiness posture is ultimately your responsibility. You are responsible for ensuring compliance with NARA, DoD, DoN, and USMC policy.

IMPORTANT RM LINKS

Command Records Operational Support Site
<https://eis.usmc.mil/sites/CROSS>

ARDB Website:
Records Reports and Directives Management (marines.mil)

BRILLIANCE IN THE BASICS

1. Have you read [MCBUL 5210 dtd 5 March 2021?](#)

Commanders' roles and responsibilities as it pertains to the ERM migration are annotated in paragraph 3(b)(1).

2. Does your command have an appointed Command Designated Records Manager (CDRM) registered in the Command Records Operational Support Site (CROSS) within the last year?

The representative with delegated authority to manage your command's RM program should have the sufficient rank, experience, and maturity necessary to enforce compliance with the Inspector General of the Marine Corps (IGMC) Functional Area Checklist (FAC) 5210, Records Management Program, and coordinate training on behalf of the command.

3. Does your command have a Capstone billet requiring annotation in CROSS? If so, is it current?

Capstone billets are General Officer, Senior Executive Service, and other key billets whose records (both classified and unclassified) are subject to permanent retention.

4. Does your command have Staff Section RMs assigned to every section in CROSS? (i.e., company, "S" shop, "G" shop, directorates, etc.)

Remember, records can be found in every section of your command, not just the S-1/G-1 (i.e., companies, other "S/G" shops, directorates, etc.) Who has been assigned to manage them?

5. Does your command have a complete file plan uploaded in CROSS?

The command file plan is a compilation of each staff section's frequently used record schedules.

6. Has your command implemented ERM?

Utilizing file cabinets for records maintenance is a thing of the past. Effective 2021, commands must utilize MCTILM for the management all records, unless a specific policy exclusion is notated in CROSS (i.e., classified records).

7. Has your command conducted its annual RM training and uploaded training rosters into CROSS?

Everyone handles records, which means everyone is responsible for their proper identification, maintenance, and disposal. Uploading your unit's training rosters demonstrates command compliance to ARDB for inspection purposes.

CDRM SUPPORT SYSTEM TOOLS

PHASE I - CROSS



Programmatic Support

Set-up and maintain RM program
Create a file plan

Note: CROSS replaces the need for a traditional turnover binder.

PHASE II - MCTILM



Electronic RM

A SharePoint configuration to declare and store records. Automatically disposes of short-term temporary records.

PHASE III - ERM Preservation



A long-term system solution is currently pending decision at HQMC.

GET IN TOUCH

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