

# USMC Records Management



## QUICK SERIES: FOR STAFF SECTION RMs

*The landscape of United States Marine Corps (USMC) Records Management (RM) is rapidly evolving to embrace a 21st century solution. It is therefore incumbent upon Staff Section Records Managers, with support from Command Designated Records Managers (CDRM), to ensure their organization's successful migration from textual (hardcopy) records to electronic records management (ERM).*

***Responsibilities:** It is the responsibility of every Staff Section RM to ensure that records within their area(s) of responsibility (AOR) are maintained in full compliance with Department of Defense (DoD), Department of Navy (DoN), and USMC policy. In addition to informing their organizational hierarchy and file plan, Staff Section RMs also serve as a RM touchpoint or liaison between the CDRM and all personnel within their AOR.*

**Related Quick Series:** Commanders, CDRMs, CROSS End User Guide, CROSS Slick Sheet

## Why Does My Role Matter?

Historically, RM has been a collateral duty associated almost exclusively with the S-1 or the G-1. However, it is virtually impossible for one or two CDRMs to track every record created, managed, and disposed of across every section of an entire organization! For this reason, Marine Corps policy is evolving to emphasize more of a “divide and conquer” mindset. As a Staff Section RM, you are the delegated “go-to” person for all things related to RM. Whether your AOR is comprised of one section (i.e., Career Planner) or multiple subsections (i.e., G-4), your role is to oversee and enforce RM compliance for your piece of the puzzle in order to enable your CDRM to focus on the big picture.

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>

## BRILLIANCE IN THE BASICS

### 1. Do you have a current Staff Section RM account in CROSS?

The registration process in CROSS generates automated appointment letters for all RM roles, to include Staff Section RMs. Note: As a Staff Section RM, your organizational CDRM (not your immediate supervisor) is your approving official.

### 2. Is the organizational structure/hierarchy for your AOR accurate in CROSS? If not, refer to #5.

The organizational structure in CROSS was originally pulled from DON TRACKER (a task management system) and is not necessarily an accurate reflection of internal RM business practices. Since all sections create and manage records, all sections must be identified. This organizational hierarchy is later exported into MCTILM.

### 3. If your AOR is comprised of multiple subsections (i.e., G-4), have you assigned Staff Section RMs to 100% of these subsections in CROSS?

Required per question 0106 of the 5210 Functional Area Checklist. Remember, records can be found in every section of your organization, not just the S-1/G-1. Who has been assigned to manage them/inform the section file plan?

### 4. Do you have a completed file plan for your AOR in CROSS?

This is the primary function of Staff Section RMs and required per question 0107 of the 5210 Functional Area Checklist. Note: Section file plans "roll up" to inform the overall command/organizational file plan. Be sure to include the location and format of records within your AOR, in addition to any policy exclusions which may prohibit them from being stored in MCTILM (i.e., records involving PHI, classified records, etc.). All sections within an organization must have a complete file plan before implementing MCTILM.

### 5. Have you notified your CDRM of any modifications to your organizational structure or file plan?

CROSS is designed to be a "one-stop shop" for all programmatic elements of RM. As such, it requires limited, annual maintenance. However, any changes (i.e., adding deleting record schedules to/from your file plan, requesting the addition or deletion of subsections, etc.) should be transparent to your CDRM. Changes made in CROSS will require manual editions in MCTILM.



## THE GOOD NEWS

You do not need to have a background in RM in order to be an effective Staff Section RM! All end user guides and training materials are available to you in CROSS or via the ARDB website at:

[Records Reports and Directives Management \(marines.mil\)](http://marines.mil)

## 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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