

COMMAND RECORDS OPERATIONAL SUPPORT SITE (CROSS) END USER GUIDE

Version 3.4 09/08/2020 Prepared by:



Abstract

This document describes the process required for Command Designated Records Managers (CDRMs) and other users to navigate features and functionality of the Command Records Operational Support Site (CROSS). Functionality of the site aligns with records management requirements for a Records Management Program and the Inspectors General Checklist Records Management 5210. This site is in continual development and welcomes the engagement from users to make improvements and to incorporate more user-friendly features.

This guide has been updated to incorporate the latest version of changes/updates to CROSS. For a complete list of system updates, please select **"view current release notes"** found on CROSS (top left ribbon).

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Version History

Version	Date	Changes	Made By
1.0	07/31/2019	Initial Draft	Vicktoria Holifield
1.1	8/21/2019	Design and Informational Changes	Dela Ashe
1.2	10/11/2019	Updates to MCEITS Instructions	Dela Ashe
2.0	10/25/2019	Update to site Name/site URL;	Dela Ashe
		screen shots and added new content	
3.0	11/13/2019	Update to Title page; added new content	Dela Ashe
		and screenshots of functionality from	
		Sprint 6; deleted MCEITS instructions	
		and Registration instructions	
3.1	12/06/2019	Added Org Structure Authentication,	Dela Ashe
		records schedule details, CDRM auto-	
		populate for RM Staff, Automated SSIC	
		search/Bucket Schedule Crosswalk,	
		added logo and other content	
3.2	03/09/2020	Update to content, graphics and Bucket	Dela Ashe
		Schedule Directory functionality	
3.3	07/06/2020	Update to CROSS URL, format, TOC,	Dela Ashe
		added RM Support page	
3.4	09/08/2020	Change in format, reorganized headings,	Dela Ashe
		edits to content, removed NJDA	
		references	
3.5			
4.0			

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IMPORTANT NOTICE

All user interaction should be performed using the CROSS interface/CDRM and Staff Section Homepages, instead of any system pages, such as 'All Site Content.' If you find yourself in any system pages, **do not update** any information directly through the native list update forms, and return back to the CROSS homepage immediately (<u>https://eis.usmc.mil/sites/cross</u>). **Do not, under any circumstance, navigate around the site content**, as those are intended strictly for ARDB internal use. Weekly audits will be conducted to check for inadvertent modifications to CROSS application data in order to maintain the necessary data integrity for the application to run as intended.

THIS SITE IS NOT USED TO COLLECT, MANAGE AND STORE RECORDS.

MCTILM and DON TRACKER are current authorized systems, utilized for managing records electronically.

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1.0 PURPOSE AND SCOPE

This guide is intended to direct Command Designated Records Managers (CDRMs) and Staff Section Records Managers (RMs) through the initial phase of migration to electronic records management (ERM). The Office of Management and Budget (OMB) Memorandum 19-21 mandates that all federal records must be created, retained and managed in electronic formats, with appropriate metadata and consistent with records management laws and regulations by 31 December 2022. The Command Records Operational Support Site (CROSS) is a tool utilized in a three-phased approach, to Marine Corps ERM compliance. This process guide will focus on the functionality of CROSS and the roles/responsibilities of CDRMs and Staff Section RMs. It will demonstrate how CROSS is utilized in order to meet the policy requirements of MCO 5210.11F, to create/maintain a records management program and to categorize records.



CDRM Program Support Systems

2.0. OVERVIEW

The Command Records Operational Support Site (CROSS) is a SharePoint tool designed to aide Command Designated Records Managers (CDRMs) in the creation and management a USMC Records Management (RM) Program. CROSS is a command focused, action-oriented site based on the roles of a CDRM and Staff Section Records Managers. CROSS is a "one stop shop" for RM knowledge management, tools and resources. It is designed to replace the traditional turnover binder and to automate 5210 IG Functional Area Checklist. CROSS aligns with MCO 5210.11F policy requirements and serves as a means of identifying all USMC records while giving both HQMC ARDB and the IGMC purview over command progress to electronic records management.

The functionality of CROSS interactively streamlines RM processes and knowledge for its users. Functionality enables organizations to quickly determine the state of their RM programs, to oversee command sections/areas of responsibility (AOR) below and within the chain of command. CDRMs and Staff Section RMs can measure Inspector General (IG) Inspection Checklist requirements in order to determine what actions are needed to maintain compliance.

CROSS allows users to identify/track CAPSTONE Officials, annual training requirements, Standard Operating Procedures (SOPs) and to list an Essential Records Inventory. Electronic file plans are created utilizing the CROSSWALK of records from Standard Subject Identification Code (SSICs) to the Department of the Navy (DON) Bucket Schedules. CROSS compiles the organization file plan by cataloging all records created within each area of responsibility, enabling file plan export to other electronic RM systems such as the Marine Corps Tool for Information Lifecycle Management (MCTILM) and the DON Tasking, Records and Consolidated Knowledge Enterprise Repository (DON TRACKER).

Other features of CROSS provide users access to RM templates, resources and materials found in the Search CROSS Articles and Documents menu. Users have access to Frequently Asked Questions (FAQ) and the RM Policy Matrix for additional guidance and support. CROSS provides the capability for users to interact and communicate with all registered personnel within their organizational structure and HQMC ARDB Contract Personnel for general RM assistance/Help Desk support.

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3.0. COMMANDER/AGENCY HEAD ROLES AND RESPONSIBILITIES

All Commanders/Agency Heads/Directorates own the RM Program for their organization and by direction of MCO 5210.11F, must appoint a CDRM to establish and maintain an RM Program. Through the registration process, Agency Heads and Commanders are required to have a MCEITS account in order to autogenerate and electronically sign the appointment letter for CDRMs.

UNITED STATES MARINE CORPS 3.1 CDRM Appointment Letter 5210 Adj 8/21/2019 Officer, MCIEAST - MARINE CORPS INSTALLATIONS EAST ming CIV Timmy L ■ The appointment of a CDRM should APPOINTMENT as Primary Unit CDRM be reviewed annually or upon (a) MCO 5210.11F (b) SECNAV M-5210.1 change of command the references, you are appointed as the Primary Unit CDRM (CDRM). You are directed to be all other pertinent/applicable directions or instance in the second second second second second second second s ities include but are not limited to: Oversee and implement respective re anaged in all staff sections). and implement a vital records program leaves When a CDRM the ment policy to ensure protection of organizational records in compliance with legal and statut organization, a new CDRM should be e. Ensure appropriate and sufficient network and repository resources are available to execute accordance with this Order. appointed within 30 days of f. Promote timely transfer of records as outlined in chapter 3 of reference (a). departure of the old CDRM by g. Ensure organization records management practices comply with the Inspector Gen Area Checklist 5210. following the registration process in i. Maintain a command turnover for this program the "USMC RM MCEITS Account 3. Points of Contact Request Guide" and the "CROSS End (1) Name: Froemming CIV Timmy L (2) Grade: User Registration Guide" (3) Phone: 910-451-3032 **Appointment Letter Template** (4) Email: timmy.froemming@usmc

<u>NOTE:</u> Once the CDRM is approved by the CO/Agency Head or Directorate, the IG Self Inspection Checklist tab within CROSS, will automatically mark Section 101 as "Compliant".

4.0. CDRM ROLES AND RESPONSIBILITIES

CDRMs create and manage the organization RM Program and utilize the functionality of CROSS to provide oversite of all programmatic aspects.

- CDRMs generate Standard Operating Procedures (SOP) to standardize record keeping practices and to provide direction to Records Managers (RMs)
- Tracks annual training requirements
- Tracks CAPSTONE Officials (where applicable)
- Conducts internal audits/inspections in order to maintain compliance
- Serves as the liaison for RM information, tools and resources from HQMC ARDB
- Create/maintain an Essential Records Program

Commande

Alford MajGen Julian

The CDRM Homepage is the landing page for registered RM Personnel.

There are **"clickable"** links on the Homepage that open other functionalities for **CDRM REQUIRED ACTIONS** or for **CDRM REVIEW**, once selected:

- 1. Complete/Update the Organizational Structure
- 2. Designate RM Personnel as Staff Section RMs for each subsection
- 3. Autogenerate/ Update Appointment Letter, "Click to generate"
- 4. Complete Organizational Info tab components
- 5. Use IG Self-Checklist to prepare for inspections
- 6. Review Command File Plan
- 7. Complete an Essential Records Inventory and "Upload to Miscellaneous Docs"

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			Staff Section Records Manager: Buechner CIV Mark W	Approved	Marine Corps Air Station New River, NC	2020-01-04	Audits:
			Staff Section Records Manager:	Approved	Marine Corps Air Station New River, NC	2020-01-04	Filename Upload Date
+ MCIEAST_MCCS (MARINE CORPS COMV	MUNITY SERVICES)		Henriquez LIV Jose A Staff Section Records Manager:	Approved	Marine Corps Base Camp Lejeune, NC	2020-01-28	- Add Audit File
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4.1. COMMAND/ORGANIZATIONAL HIERARCHY

CROSS provides a starting hierarchy for each organization, derived from the organization structure in DON TRACKER. CDRMs can utilize the current structure or customize their program hierarchy based on the areas of responsibility designated across each Command/Organization. CROSS only allows CDRMs the ability to see two levels down due to system performance. However, if other levels exist, CDRMs can contact HQMC ARDB/ Hartwood Consulting Group Contract Support via e-mail at <u>smb hqmc rmoutreach@usmc.mil or through CROSS Contacts feature</u> to determine how best to complete your organization structure.

MCIPAC_MCASF_S-1 (MANPOWER, PERSONNEL & ADMINISTRATION)			There are no RMs lis	ted for this unit	
MCIPAC_MCASF (MARINE CORPS AIR STATION FUTENMA)		Alternate Unit CDRM: Matthews CIV Chikako	Approved	Okinawa, Japan	2019-08-19
ASI (MARINE CORPS AIR STATION IWAKUNI)		Primary Unit CDRM: Kelly 2ndLt Sean P	Approved	Marine Corps Air Station Iwakuni, Japan	2019-09-09
MCBH (MCB HAWAII COMMAND DECK)		Alternate Unit CDRM: Sprung Civ Alfred	Approved	Marine Corps Base Hawaii, HI	2019-05-23
MCIPAC_MCCS (MARINE CORPS COMMUNITY SERVICES)			There are no RMs lis	ted for this unit	
MCIPAC_G-3 (OPERATIONS AND TRAINING)		There are no RMs listed for this unit			
MCIPAC_PACO (PACIFIC AREA COUNSEL OFFICE)		There are no RMs listed for this unit			
MCIPAC_COMMSTRAT (MCIPAC COMMUNICATION STRATEGY AND OPERATIONS)			There are no RMs lis	ted for this unit	
MCIPAC_RCO (REGIONAL CONTRACTING OFFICE)		Staff Section Records Manager: Pasindo-Rubio 1stLt Zully	Approved	Okinawa, Japan	2019-09-25
MCIPAC_RELMIN (RELIGIOUS MINISTRIES DEPARTMENT)					
MCIPAC_SAFETY (SAFETY)		Staff Section Records Manager: Omi CIV Sara	Approved	Okinawa, Japan	2019-10-23
MCIPAC_SAPR (SEXUAL ASSAULT PREVENTION & RESPONSE)			There are no RMs lis	ted for this unit	
MCIPAC_SJA (STAFF JUDGE ADVOCATE)			There are no RMs lis	ited for this unit	
MCIPAC_H&HSMCASF (HEADQUARTERS & HEADQUARTERS SQUADRON MCAS FUTENMA)		Primary Unit CDRM: Southworth 1stLt Steven M	Approved	Okinawa, Japan	2019-08-09
	MCIPAC_MCASF_S-1 (MARNPOWER, PERSUNNEL & ADMINISTRATION) MCIPAC_MCASF (MARINE CORPS AIR STATION FUTENMA) ASI (MARINE CORPS AIR STATION IWAKUNI) MCIPAC_MCCS (MARINE CORPS COMMUNITY SERVICES) MCIPAC_G-3 (OPERATIONS AND TRAINING) MCIPAC_G-3 (OPERATIONS AND TRAINING) MCIPAC_COMMSTRAT (MCIPAC COMMUNICATION STRATEGY AND OPERATIONS) MCIPAC_RED (REGIONAL CONTRACTING OFFICE) MCIPAC_REC (REGIONAL CONTRACTING OFFICE) MCIPAC_RELIMIN (RELIGIOUS MINISTRIES DEPARTMENT) MCIPAC_SAFETY (SAFETY) MCIPAC_SAPR (SEXUAL ASSAULT PREVENTION & RESPONSE) MCIPAC_SAF (HEADQUARTERS & HEADQUARTERS SQUADRON MCAS FUTENMA)	INCLEAR_MICHAR_MICHTER, PERSONNEL & ADMINISTRATION) MCIPAC_MCASF (MARINE CORPS AIR STATION FUTENMA) ASI (MARINE CORPS AIR STATION IWAKUNI) MCIPAC_MCASF (MARINE CORPS AIR STATION IWAKUNI) MCIPAC_MCCS (MARINE CORPS COMMUNITY SERVICES) MCIPAC_G-3 (OPERATIONS AND TRAINING) MCIPAC_G-3 (OPERATIONS AND TRAINING) MCIPAC_COMMSTRAT (MCIPAC COMMUNICATION STRATEGY AND OPERATIONS) MCIPAC_RCO (REGIONAL CONTRACTING OFFICE) MCIPAC_RCO (REGIONAL CONTRACTING OFFICE) MCIPAC_RELIMIN (RELIGIOUS MINISTRIES DEPARTMENT) MCIPAC_SAFETY (SAFETY) MCIPAC_SAPR (SEXUAL ASSAULT PREVENTION & RESPONSE) MCIPAC_SAFET (MARTH ADVOCATE) MCIPAC_SAFETY (SAFETY)	MCIPAC_MCASF_ST (MARNOWER, PERSONNEL & ADMINISTRATION) Alternate Unit CDRM: MCIPAC_MCASF (MARINE CORPS AIR STATION FUTENMA) Alternate Unit CDRM: MCIPAC_MCASF (MARINE CORPS AIR STATION IWAKUNI) Primary Unit CDRM: Kelly 2ndLt Sean P MCBH (MCB HAWAII COMMAND DECK) Alternate Unit CDRM: Sprung Civ Alfred MCIPAC_G-3 (OPERATIONS AND TRAINING) MCIPAC_G-3 (OPERATIONS AND TRAINING) MCIPAC_COMMSTRAT (MCIPAC COMMUNICATION STRATEGY AND OPERATIONS) MCIPAC_RECO (REGIONAL CONTRACTING OFFICE) Staff Section Records Manager: Pasindo-Rubio 1stlt Zully MCIPAC_RELMIN (RELIGIOUS MINISTRIES DEPARTMENT) MCIPAC_SAPR (SEXUAL ASSAULT PREVENTION & RESPONSE) MCIPAC_SAPR (SEXUAL ASSAULT PREVENTION & RESPONSE) MCIPAC_SAPR (SEXUAL ASSAULT PREVENTION & RESPONSE) MCIPAC_SAFF (HEADQUARTERS & HEADQUARTERS SQUADRON MCAS FUTENMA)	INCLEAR_MCASE_ST (MARMPORE, PERSONNEL & There are no RMs is ADMINISTRATION) Internate Unit CDRM: Approved Matthews CIV Chickoo ASI (MARINE CORPS AIR STATION FUTENMA) Alternate Unit CDRM: Matthews CIV Chickoo Approved ASI (MARINE CORPS AIR STATION IWAKUNI) Primary Unit CDRM: Kelly 2ndLt Sean P Approved MCIEHAC_MCGS (MARINE CORPS AIR STATION IWAKUNI) Primary Unit CDRM: Kelly 2ndLt Sean P Approved MCIEHAC_MCGS (MARINE CORPS COMMUNITY SERVICES) Alternate Unit CDRM: Sprung Civ Alfred Approved MCIPAC_MCGS (MARINE CORPS COMMUNITY SERVICES) There are no RMs is MCIPAC_G-3 (OPERATIONS AND TRAINING) There are no RMs is MCIPAC_G-3 (OPERATIONS AND TRAINING) There are no RMs is MCIPAC_COMMISTRAT (MCIPAC COMMUNICATION STRATEGY AND OPERATIONS) There are no RMs is MCIPAC_RCO (REGIONAL CONTRACTING OFFICE) Staff Section Records Manager: Approved Omi CIV Sara Approved MCIPAC_RELININ (RELIGIOUS MINISTRIES DEPARTMENT) Staff Section Records Manager: Approved Omi CIV Sara Approved MCIPAC_SARE (SEXUAL ASSAULT PREVENTION & RESPONSE) There are no RMs is MCIPAC_SIA (STAFF JUDGE ADVOCATE) MCIPAC_H&HSMCASF (HEADQUARTERS & HEADQUARTERS Primary Unit CDRM: Southworth 1stLt Steven M Approved	INCLEAC_MCASE_ST (MARINE CORPS AIR STATION FUTENMA) Alternate Unit CDRM: Matthews CIV Chikako Approved Okinawa, Japan ASI (MARINE CORPS AIR STATION IWAKUNI) Primary Unit CDRM: Kelly 2ndLt Sean P Approved Marine Corps Air Station Iwakuni, Japan MCIPAC_MCASF (MARINE CORPS AIR STATION IWAKUNI) Primary Unit CDRM: Kelly 2ndLt Sean P Approved Marine Corps Air Station Iwakuni, Japan MCBH (MCB HAWAII COMMAND DECK) Alternate Unit CDRM: Sprung Civ Alfred Approved Marine Corps Base Hawaii, HI MCIPAC_MCCS (MARINE CORPS COMMUNITY SERVICES) There are no RMs listed for this unit McIPAC_G-3 (OPERATIONS AND TRAINING) MCIPAC_G-3 (OPERATIONS AND TRAINING) There are no RMs listed for this unit McIPAC_COMMSTRAT (MCIPAC COMMUNICATION STRATEGY AND OPERATIONS) There are no RMs listed for this unit MCIPAC_RCO (REGIONAL CONTRACTING OFFICE) Staff Section Records Manager: Omi CIV Sara Approved Okinawa, Japan MCIPAC_SAR (SEXUAL ASSAULT PREVENTION & RESPONSE) Staff Section Records Manager: Omi CIV Sara Approved Okinawa, Japan MCIPAC_SAR (SEXUAL ASSAULT PREVENTION & RESPONSE) There are no RMs listed for this unit MCIPAC_SARE (SEXUAL ASSAULT PREVENTION & RESPONSE) There are no RMs listed for this unit MCIPAC_SAR (SEXUAL ASSAULT PREVENTION & RESPONSE) There are no RMs listed for this unit MCIPAC_H&HSM

CDRM REQUIRED ACTION(S):

- Select the "+" sign next to the unit/section name to view additional organizational levels.
- Review and verify the Command/ Organization hierarchy
- Contact HQMC ARDB Contract Support to make changes, i.e. to delete personnel, add sections, change nomenclature through the Organizational Tab (see page 22)

4.1.1. ORGANIZATIONAL STRUCTURE

Following verification of the organization hierarchy, CDRMs can change their organizaton structure (add and/or delete Subsections) through the Organization/Information interface.

For the question: Is the organizational structure in the subsection list correct?

- Select "**Yes**" if the Organization Hierarchy is correct
- Select "**NO**," to initiate changes
- Select "Add Org Hierarchy file" and upload a PDF, or Excel Spreadsheet with the correct organizational structure
- Select "Upload"

<u>NOTE:</u> Uploading a document with changes automatically sends an email prompt to HQMC ARDB/Hartwood Consulting Group Outreach Support to make corrections.



4.2. DESIGNATE PROGRAM SUPPORT PERSONNEL

CDRMs identify and assign Staff Section RM personnel across Command/organization to be the designated point of contact (POC) for records management within their respective sections. These personnel are essential to communicating RM policy and procedures to all other personnel (Active Duty, Civilians, Contractors) in their assigned area.

Each RM Program should have the following key roles assigned.

- Primary CDRM
- Alternate CDRM
- Staff Sectional Records Manager
- MCTILM Administrator or Site Collection Administrator (SCA)

CROSS provides CDRMs the capability to create an electronic roster of RM Personnel

+	MCIPAC_MCASF_S-1 (MANPOWER, PERSONNEL & ADMINISTRATION)		There are no RMs lis	ted for this unit	
+	MCIPAC_MCASF (MARINE CORPS AIR STATION FUTENMA)	Alternate Unit CDRM: Matthews CIV Chikako	Approved	Okinawa, Japan	2019-08-19
+	MCASI (MARINE CORPS AIR STATION IWAKUNI)	Primary Unit CDRM: Kelly 2ndLt Sean P	Approved	Marine Corps Air Station Iwakuni, Japan	2019-09-09
+	MCBH (MCB HAWAII COMMAND DECK)	Alternate Unit CDRM: Sprung Civ Alfred	Approved	Marine Corps Base Hawaii, HI	2019-05-23
+	MCIPAC_MCCS (MARINE CORPS COMMUNITY SERVICES)		There are no RMs lis	ted for this unit	
+	MCIPAC_G-3 (OPERATIONS AND TRAINING)	There are no RMs listed for this unit			
+	MCIPAC_PACO (PACIFIC AREA COUNSEL OFFICE)	There are no RMs listed for this unit			
+	MCIPAC_COMMSTRAT (MCIPAC COMMUNICATION STRATEGY AND OPERATIONS)	 	There are no RMs lis	ted for this unit	
+	MCIPAC_RCO (REGIONAL CONTRACTING OFFICE)	Staff Section Records Manager: Pasindo-Rubio 1stLt Zully	Approved	Okinawa, Japan	2019-09-25
+	MCIPAC_RELMIN (RELIGIOUS MINISTRIES DEPARTMENT)				
+	MCIPAC_SAFETY (SAFETY)	Staff Section Records Manager: Omi CIV Sara	Approved	Okinawa, Japan	2019-10-23
+	MCIPAC_SAPR (SEXUAL ASSAULT PREVENTION & RESPONSE)		There are no RMs lis	ted for this unit	
+	MCIPAC_SJA (STAFF JUDGE ADVOCATE)		There are no RMs lis	ted for this unit	
+	MCIPAC_H&HSMCASF (HEADQUARTERS & HEADQUARTERS SQUADRON MCAS FUTENMA)	Primary Unit CDRM: Southworth 1stLt Steven M	Approved	Okinawa, Japan	2019-08-09

CDRM REQUIRED ACTIONS:

- Identify and assign RM personnel to the role of Staff Section Records Manager within their area of responsibility
- Ensure personnel are registered to their corresponding subsection (i.e., G-shops, SJA, HQMC sections, etc.). Each person must have a MCEITS account in order to access the site. Reference the USMC RM MCEITS Registration Guide and the CROSS End User Registration Guide.
- Contact HQMC ARDB Contract Support Personnel for corrections or to delete personnel who may have changed duty stations.

<u>NOTE:</u> When 100% of Staff Section RMs have been assigned/registered to their respective subsections, Section 104 on IG Self Checklist tab will automatically be marked "Compliant". When 51%-99% are registered, a "Discrepancy" will show and a "Finding" will appear when 50% or less are registered.

RMs for 741: MCIEAST - MARINE CO	RPS INSTALLATIONS EAST					
RMs	Status	Locat	ion	App	t Letter	
Primary Unit CDRM: Froemming CIV Timmy L	Approved	Marin	e Corps Base Camp Lejeune, NC	2019	9-08-21	
Primary Unit CDRM: DESIR SSGT RODELYNE	Approved	Marin	e Corps Base Camp Lejeune, NC	2019	9-10-25	
Primary Unit CDRM: Bastien Ctr Talia		Penta	gon (Other NCR), Washington, D.C.	2019	9-12-11	
Primary Unit CDRM: CDRM I	LIST	Penta	gon (Other NCR), Washington, D.C.	202	0-02-18	
Alfernate Unit CDIM: Approved Marine Corps E Marine Korg Corlos Alfernate Unit CDIM: If Controlling Marine Corps E Statematic Unit CDIM: If Controlling Marine Control on DMA: Sharey			e Corps Base Camp Lejeune, NC	2019	9-08-21	
			As show in the CDPM List they		9-08-21	
Staff Section Records Manager: Jackson CIV Pamela G	have resistanted	a the second sec		2019	9-12-11	
	nave registered t	o the	e wrong unit			
SubSections List						
+ ALL Unit		🔲 AL	L RMs	Status	Location	Appt Letter
+ MCIEAST_CHAP (CHAPLAIN) Fileplan Created: Yes			Staff Section Records Manager: Lagana CIV Corey L	Approved	Marine Corps Base Camp Lejeune, NC	2019-12-19
+ MCIEAST_CIG (COMMAND INSPECT Fileplan Created: Yes	+ MCIEAST_CIG (COMMAND INSPECT STAFF SECTION Fileplan Created; Yes			There are no RMs	listed for this unit	
+ MCIEAST_G-6 (COMMUNICATIONS Fileplan Created: Yes RM LIST				There are no RMs	listed for this unit	
+ MCIEAST_G-8 (COMPTROLLER) Fileplan Created: Yes			Staff Section Records Manager: Schilling CIV Lisa A	Approved	Marine Corps Base Camp Lejeune, NC	2020-02-05
+ MCIEAST_EEO (EQUAL EMPLOMENT OF Fileplan Created: No	PPORTUNITY BRANCH)		Staff Section Records Manager: Dean CIV Darcy D	Approved	Marine Corps Base Camp Lejeune, NC	2020-01-22
MCIEAST FOA (FOUAL ODBORTUNITY)	ADV(COP)					

4.2.1. STAFF SECTION RM APPOINTMENT LETTER

CDRMs are appointed by Commanders/Agency Heads/Directorates at registration. Staff Section RMs are not required to be appointed. However, to assign personnel to organization subsections, CROSS autogenerates appointment letters for Staff Section RMs during the registration process as well.

- CDRMs assign and approve Staff Section RM registrations (see the "CROSS End User Registration Guide").
- The homepage displays the Appointment letter date for each personnel
- Select the **appointment letter date** to display the appointment letter template (see page 7)

Appointment letters expire and should be updated annually. The date listed under the Appointment Letter tab will show **RED** if the Appointment letter is outdated by more than one (1) year and **GREEN** if the Appointment Letters are current within one (1) year from the date of upload/creation.

Approved Approved	Marine Corps Air 1 NC Marine Corps Air 1 NC	To bring your Appointment letter	
Approved	Marine Corps Air : NC	to current, Select the UPDATE tab.	Update
Approved	Marine Corps Base	camp rejeand, NC 2017-01-13	Update
Approved	Marine Corps Base	e Camp Lejeune, NC 2017-01-19	Update
Approved	Marine Corps Air S NC	itation New River, 2016-09-13	Update
Approved	Marine Corps Base	e Camp Lejeune, NC 2017-06-19	Update

5.0. ORGANIZATIONAL INFORMATION

The Organizational Info tab identifies important information unique to the Command/Organization and enables users to meet programmatic requirements by uploading documents to libraries. CDRMs can easily access and track the most recent information, regardless of personnel turnover.

	Organizational lino ann-uneoxist Culturdect Pile Plan
CDRM REQUIRED ACTIONS	Organization Information
	Linitiefe
Select ERM	Omit mile Trypes of ERM (Eletronic Records Management) Utilized MCTLM (Marine Corps Total Information Local SharePoint Lifevelle Management)
Verify/Upload Org Structure	DON'TRACKER Drive Z Other Specify
Identify/Update Commander info	Is the organizational structure in the subsection list correct?
Add Capstone Billet	Save ERM Utilization
Upload Training Docs	Commander: Name:
Upload SOP	Title:
Add Audit Docs	Email: Update CDR
Add Essential Records Inventory	Capstone: Billet Email
	Commanding General, warne Corps mataliations Last (MCRAST) Chief of Staff for CG, MCIEAST Noholas Pavis nicholas e davis@usmc.mll
	+ Add Capitione Billet
	Training: Filename Upload Date
NOTE: By selecting each "HEADING", an	SANTOS transport 2020-06-30 SANTOS TRA 2020-06-30 SANTOS TRA 2020-06-30
explanation of that feature will show.	-upoat to "Organizational/command standard operating phocedures related to the collection, SSM management, and disposition of records."
	Filename 19-08-18 Update Upload Date 2020-08-30
	- uploid (2-00-10 Update)
	Audits: "Internal or external inspection results of Flename organizational/command records and records
	-Add Aust program. * 03
	Filename Audi

5.1. ELECTRONIC RECORDS MANAGEMENT SELECTION

All records must be maintained in an electronic format by December 31, 2022. To determine how records are currently managed, organizations should specify the types of ERM used by the organization.

- Select the types of ERM currently utilized by the organization.
- If Other is selected, be sure to specify the type in the box provided.
 For example: external hard drive
- <u>SAVE</u> your ERM Selections

Organizational Info	IG Self-Checklist	CMD/Sect File Pl	an			
	MCIEA	ST - MARINE CO	RPS INSTALLATIONS EAST			
Unit Info						
Types of ERM (Eletro MCTILM (Marine Corp: Lifecycle Management DON TRACKER	nic Records Manag s Total Information	gement) Utilized	al SharePoint re Drive			
Other Specify:		0		_ _		
Is the organizational structure in the subsection list correct?						
Save ERM Utilization						

5.2. COMMANDER INFORMATION	Organizational lob 10 Self-Checklist CMD/Sect File Plan	
Commanders own the RM program for their Organization.	Organization Information MCIEAST - MARINE CORPS INSTALLATIONS EAST Unit Info	
Select the "UPDATE CDR" button to Add Commander information.	Types of ERM (Eletronic Records Management) Utilized Uteryte Management) Device Management) Down TRACkord Corps Total Information Uteryte Management Down TRACkord Down TRACkord Share Drive Down TRACkord Share Drive Share Drive Share Drive Share Drive Share Drive Shar	
 5.3. CAPSTONE BILLETS The Add Capstone Billet tab enables 	Name: TRi: Rank: Enal: Upper COR Capstone: Bilat: Commaning General: Manne Corps Installations Julian Alford Julian d alford@usmc.mil Chef of Staff for Col, MCIEAST Nonolas Davis nionolas.e.davis@usmc.mil	_
CDRMs to designate and upload their Capstone Official information for applicable Commands only.	Add Capetone Bilet Training: Filename SANTOS TRAINING CERT por SOPOS - upload Training Docs SOPA:	_
Add Capstone X Billet Trate: Carity and Capstone Current Incumbert Name: Carity and Capstone Email Address: Carity and Capstone Email Address: Carity and Capstone Add	Filesome Upload Date FECORDS MANAGEMENT SOP (ADJ CHOP 10-6-19, DOCX 2020-00-30 - Upload Date 2020-00-30 Audits: Filename Upload Date - Add Audt Tile Macod Date 100-00-00-00 Miscellaneous: Filename Upload Date - Add Tile Upload Date	
Ratan Kucatian Appt Later (Vin appl Later Citik to Citik to		

■ Fill in the required information and select the "Add" button.

<u>NOTE:</u> For applicable Commands, known Commander Information and Capstone billets have been added/pre-populated (as shown in blue). CDRMs continue to have edit capability to those fields and should update Commander information/other CAPSTONE billets as changes occur.

CDRM REQUIRED ACTIONS FOR DOCUMENT LIBRARIES (updated annually)

5.4 TRACK ANNUAL RM <u>**TRAINING**</u> **REQUIREMENT**. Access computer based training available on the Total Workforce Management Site (TWMS), title, RECRODS MANAGEMENT IN THE DON: EVERYONE'S RESPONSIBILITY. Upload annual training roster demonstrating organization completion.

5.5 COMPLETE/UPDATE the Organization <u>Standard Operating Procedure (SOP)</u>. Use the Template under CROSS Articles and Document. Upload to CROSS.

5.6 CONDUCT INTERAL AUDITS/self-inspections of RM Program

5.7 ESSENTIAL RECORDS

When an emergency, natural disaster, or the reconstitution of an organization occurs, in order to meet operational responsibilities, records should be designated as ESSENTIAL. Essential records protect the legal and financial rights of the government and its citizens and are generally categorized according to the record type; **emergency operating record or legal and financial records.** It is the critical value of the record, both during and after an emergency, that makes it ESSENTIAL. **Reference Essential Records Training material found on CROSS.**

CDRM REQUIRED ACTIONS

- In keeping with Sub Section 403 of the 5210 Checklist, IDENTIFY all Essential Records of the Organization.
- CREATE A SEPARATE INVENTORY LIST annotating the LOCATION. Include any systems that hold records (i.e. MCTILM, DON TRACKER, DFAS, DTS, etc.). Be sure to NOTE and LIST THEIR DISPOSITION.
- Upload the Excel document or PDF to the CROSS MISC Docs tab.



■ In accordance with Sub Section 404 of the 5210 Checklist, **INVENTORY THE ESSENTIAL RECORD(S)** ANNUALLY to determine if it continues to meet operational responsibility.

See Search CROSS Related Articles and Documents page 21 for reference documents and templates

5.8 MISCELLANEOUS DOCUMENTS

CDRMs can utilize this tab to compile organizational documents required as part of the Records Management Program, such as:

- CO Authorization Form used in order to prepare for MCTILM implementation
- Essential Records Inventory

6.0 IG SELF CHECKLIST

The IG Checklist tab provides organizations the ability to track the compliance of itemized requirements for passing the records management portion of the 5210 Program Checklist.



This list identifies other IG Self Checklist Questions that have been automated:

- Checklist Item 102 marked "Compliant" when training documents are uploaded. For example: Checklist Item 102 requires annual RM training. Once this information has been uploaded into Training Documents under the Organizational Tab, Checklist Item 102 will pre-populate "Compliant".
- Checklist Item 103 "Compliant" when a Standard Operating Procedure (SOP) has been uploaded.

Has the appointed CDRM completed annual Records Management Training and is he CDRM monitoring annual raining for the command? RM Training is a FY equirement. Computer based raining (CBT) is available on MarineNet (Course ID: M01RMT0700) and Total Norkforce Management Site WMS) (Course ID: TWMS-594446). Leader-led training is available as an alternative to he CBT at: ttps://vcepub.tecom.usmc.mil/ sites/directorates/mtesd/Leade LedAnnualTraining/SitePages Home.aspx

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7.0 COMMAND/ORGANIZATION FILE PLAN

All Commands/Organizations are required to complete a file plan that annotates all the records created within their organization, utilizing Bucket Schedules (formerly SSICs). **Command file plan data will be exported to Phase II, the Marine Corps Tool for Information Lifecycle Management (MCTILM).**

Organizational Info IG Self-Checklist

CDRMs oversee the Command/Organization file plan

- The CMD/Sect File Plan tab contains itemized Record (Bucket) Schedule numbers. Ex. 1000-1, 1000-2, etc.
- File plans list all the subordinate Units/ subsections that are using those Record schedules. For example: MFK Units G-1, and G-4 have records under the 1000-1 and 1000-2 record schedules.
- Lists data are "rolled up" from the subsection file plan to create the organization file plan, indicating record format, location and policy exclusions from that subsection of why the paper record cannot migrate to an electronic format

File Plan MFK - MARINE FORCES KOREA Search arch for Bucket by Topic: Topic SSIC Save Changes to File Plan Bucket Schedule Directory Schedule # Itemized by SubOrg **V 1000-1** Policy, Strategy, and P SSIC 3427: MARINE FORCES KOREA_G-1 ADMINISTRATION Format shared drive Location ts/Evolusion 3430: MARINE FORCES KOREA_G-3/5/7 OPERATIONS Format: Location: shared driv Comments/Exclusions 3431: MARINE FORCES KOREA_G-4 LOGISTICS Format Shared drives Location Comments/Exclusion Official Military Personnel File (OMPF) 1000-2 SSIC 3427: MARINE FORCES KOREA G-1 ADMINISTRATION Location DPRIS and NPRC After 1999 in DPRI, E (Evalu re 1999, at the NPRC St Lo 3431: MARINE FORCES KOREA_G-4 LOGISTICS Format Location Military Pers SSIC is Master Fi **J 1000-3** n Svs SSI J 1000-5 Awards Progr S SIC 3427: MARINE FORCES KOREA_G-1 ADMINISTRATION Format: Location IAPS **V** 1000-6 Casualty Records SSIC 3427: MARINE FORCES KOREA_G-1 ADMINISTRATION Format: Paper Location: File Cabinet in room 2528 Comments Exclusions Contract State ent to convert to electronic for 3431: MARINE FORCES KOREA G-4 LOGISTICS ocation

CMD/Sect File Plan

Information that documents the career of each officer and enlisted member of the Navy and Marine Corps from time of entry into the service until final separation from the service. During service these records are used to manage the member's assignments, duties, training, advancement, and type of separation. After completion of service, they are used primarily to protect the legal and financial rights of veterans, their families and survivors, and the U.S. Government.

You may click on the **Record Schedule #** to view the **Bucket** Schedule Description

For Ex. 1000-2 Record Schedule Description

Select the Title to view the Record Disposition (permanent vs temporary / cutoff period).

For ex. Title for 1000-2 Record Disposition

PERMANENT: Cutoff upon separation of service member. Transfer to the National Archives 62 years after cutoff.

7.1 BUCKET SCHEDULE DIRECTORY

Tailors a search/view of records by schedule across USMC organizations, who have selected a particular record schedule on their file plan (ex. FOIA requests).

Access under the CMD/Sect File Plan tab

Organizational Info CMD/Sect File Plan	
File Plan MFK G-1 - MARINE FORCES KOREA G-1 ADMINISTRATI	ION
Search for Bucket by Topic: Search Search Search	SSIC
Save Changes to File Plan Bucket Schedule Directory	
+ View All	

Example #1: A FOIA request is received for all organizations developing training courses and publications.

w 10 V www. Bucket	s Description	Search: training	Unit Stored Record Location Comments
1000-1 1000-2 1000-22 1000-27 1000-36	nomation relating to the development, implementation, interpretation and overal administration of Nary and Marine Corps-inde policies, toxicates, attrategy and planning for programs particulings in military personnel material. This displacition is information toxicates and information for the services and constraints of Nary and Narine Corps personnel policies, and programs policies (Corps and Corps and Corps and Corps and Corps and Corps personnel policies, and policies and corps and corps and corps and corps and corps and corps and corps personnel policies, and policies and the corps and corps policies (Corps and Corps and the Nary and formation that documents the corps and co		SET DAGNING TRATION SET DAGNING TRATION DESCRIPTIÓN SET DAGNING TRATIONAL DESCRIPTIÓN DESCRIPTIÓN SET DAGNING TRATIONAL DESCRIPTIÓN DESCRIPTIÓN SET DAGNING TRATIONAL DESCRIPTIÓN DESCRIPTIÓN DESCRIPTIÓN SET DAGNING TRATIONAL DESCRIPTIÓN DES
1000-7	classification, evaluation worksheets and reports, evidence of training, examination scores, and temporary assignments. Information relating to the overall management and organization of the programs and planning, procedural development, progress and significant accomplications of advelopment and training organism. Individue the stabilithemet, based and relating converse, curricola, and publications; and the evaluation of methods and results of instruction. Also includes school publications and overall statistica data.	1.	Determine search criteria (such as Training)
11000-13	not limited to, attivities subsitience aports temperature log othering store requiritors and neiselys. Insul uniform thep necodits similar materials that report. The family required and hereinon, and advances and advances and an experiments and investion; information relating to the management of Department of the Navy U.S. Yava, and U.S. Murier Corps free protection and fine fighting apograms. Indiced so not limited to, program development and execution, case lifes training resons, registers of fine fighting equipment issued; daily log of operations, fine airam and fine hydrant inspections, and fine investigation reports. de entries (Reared from 712 total entries)	2. 3.	Select the Record Schedule (1000-22) to view all commands/organizations with records under that schedule Data will include UNIT, FORMAT, LOCATION, COMMENTS

8.0 STAFF SECTION RECORDS MANAGER ROLES AND RESPONSIBILITIES

Staff Section RMs are designated to assist CDRMs as the point of contact (POC) for their subsection and for the execution of records management duties in his/her respective section (see Designate Program Support Personnel page 10).

STAFF SECTION RM REQUIRED ACTIONS

CATEGORIZE RECORDS in their respective sections/offices by type of record (temporary or permanent) and by the DON Record Schedule

<u>**RECALL:</u></u> DON Record Schedules are used in place of Standard Subject Identification Codes (SSICs) to manage the disposition date affiliated with the record. The disposition date determines when the record will be destroyed (temporary records) or transferred to NARA for permanent preservation/ retirement (permanent records). Reference training material for USMC, "Records Management Everyone's Responsibility", found on CROSS, using the Search CROSS Articles and Documents feature.</u>**

- "CROSSWALK"/convert records from use of SSIC codes to DON Bucket Schedules using the Automated Crosswalk functionality.
- CREATE A SUBSECTION FILE PLAN. File plans are the starting point for the organization's records that provide a roadmap to WHO created the record (command/subsection, office, etc.), WHAT type of record (temporary/permanent), WHERE the record is located (file cabinet, Share Drive, SharePoint, MCTILM, etc.) and WHEN the record will be disposed (i.e. cutoff at 10 years and transfer to NARA).
- **UPDATE** the appointment letter annually
- COMMUNICATE regularly with CDRMs and SERVE as conduits of RM information from the CDRM to other section /office personnel (Active Duty, Civilians, Contractors).

8.1 AUTOMATED CROSSWALK

It is important to distinguish between a record's **content** (SSIC) and its **disposition** (Record Schedule).

SSIC = identification of record based on subject matter

vs.

Record Schedule = disposition date affiliated with record type

EXAMPLE #1: An appointment letter may be **created** in reference to training (SSIC 3300), however, it should be **filed** under Record Schedule 5000-1 (General Correspondence) because that is the "Record Schedule" which handles/disposes of appointment letters.

EXAMPLE #2: The Marine Corps Order regarding Awards uses SSIC 1650 to identify content, however it is filed under Record Schedule 5000-8 (Directives Case Files).

Functionality in CROSS gives users the capability to "CROSSWALK" from a SSIC to a DON Record Schedule.

Under the CMD/Section File Plan tab, "Search by Keyword" to generate a list of associated SSICs and Bucket or Record Schedules to the topic.

EXAMPLE #1: When typing in the keyword "Policy", a list of all SSICs and DON Record Schedules for "policy" will display.

- Locate the SSIC on in the far right column and "CROSSWALK" to the corresponding DON Bucket or Record Schedule in the far left column.
- Record the record schedule number and annotate on the file plan under 1 of 13 "Buckets" (see Section File Plan on page 19).



Users can also reference the old SSICs for the record schedule by selecting "**SSIC**" on the File Plan, whereas a comprehensive list of all SSICs that align to that record schedule will display.

EXAMPLE #1: A user selects the CMD/Section File Plan tab and toggles "Filter by Chapter", then Chapter 1-Military Personnel. If "SSIC" for Record Schedule 1000-1 on the file plan is selected, a pop-up list of all SSICs for that Record Schedule will display.

			Click to		^		
1070.17a(1): PERSONNEL RECORDS				_			
1070 17b/1): PERSONNEL RECORDS	There are no RMs list			_	+ Show Unchecked		
NOT THE TEROONNEE RECORDS	There are no RMs list				Schedule #	Title	Itemized by SubOrg
1070.17c(1): PERSONNEL RECORDS				-	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
1070.17d(1): PERSONNEL RECORDS				-			to the Schedule #
1070 17e(1) PERSONNEL RECORDS	There are no RMs list	ed for this unit		_	1000-1	Policy, Strategy, and Planning	SSIC
Internet in the second s					- 787: MARINE CORPS A	IR STATION BEAUFORT	\frown
1070.18a: PERSONNEL RECORDS	There are no RMs list	ed for this unit			- 938: HEADQUARTERS.	AND SUPPORT BATTALION Official Military Personnel File (OMDE):	8810
1070.17a(1): PERSONNEL RECORDS	There are no RMs list				22: HEADOLIADTERS	AND SUBBORT BATTALION	3310
1070.17b(1): PERSONNEL RECORDS				-	1000-3	Military Personnel Information Systems Master	SSIC
				-		Files:	
1070.17c(1): PERSONNEL RECORDS				-	- 938: HEADQUARTERS	AND SUPPORT BATTALION	
1070.17d(1): PERSONNEL RECORDS				_	⊘ 1000-4	Personnel Accounting (Permanent):	SSIC
	There are no RMs list				1000-11	"Marine Corps Marathon" Races and Event	SSIC
1070.17e(1): PERSONNEL RECORDS					4000.40	Series Database, Race Willier Records:	000
1070.18a: PERSONNEL RECORDS				_	1000-10	Awarus - Case Files.	5510
Primary Unit CDRM:					843: MARINE CORPS A	AR STATION CHERRY POINT	
Bird 2ndLt Jeremy D				_	1000-34	General Correspondence (Military Personnel):	SSIC

Annotate the SSIC and check to ensure the correct record schedule is selected.

8.2 SECTION FILE PLAN

File plans are completed by the Staff Section RM for each subsection listed, under the **CMD/Sect File** Plan tab.



- Select **"SAVE Changes to File Plan"** to ensure changes are reflected
- Select "ok" to record changes

(ex. File cabinet in room 201B)

NOTE: File plans are used for the export of file folders within Phase II migration to MCTILM and must be completed prior to implementation of MCTILM

9.0. OTHER FEATURES

9.1 EDIT USER

CROSS is an "**OPEN**" site for all registered users where users, Inspectors and HQMC ARDB are allowed visibility of all command/organization RM Programs.

- 1. Select the users name on the command/organization homepage to open "Edit User" details
- 2. "Click to Change Units" to view RM Programs of other commands/organizations
- 3. Type a partial, full name or unit ID number for the organization
- 4. Select the org from the drop-down list

Edit User	i Ig	×
Commit Clipboard Actions Spelle Save Concel Name * Ache CTR Dela L Bolic * Primary Unit CDRM	g Email dela Jashe crt@usmc.mil Phone Number 1014-09-7588	"Click" within the page to display the org hierarchy.
Region * Northeast Region Vou have listed the following as your unit: 74: MOEAST - MARINE CORPS INSTALLATIONS FAST Cick to change unit Cickinging unit: Will require a new appl letter from your new unit) from your unit:	Installation * [Pentagon (Other NCR) Washington, D.C. V] Please ensure that the list below represents your direct hierarchy structure above your unit:	Please ensure that the list below represents your direct hierarchy structure above your unit: • 698: IL - INSTALLATIONS AND LOGISTICS • 740: MCICOM - MARINE CORPS INSTALLATIONS COMMAND • 741: MCIEAST - MARINE CORPS INSTALLATIONS EAST
Treisast 741: MICEAST - MARINE CORPS INSTALLATIONS EAST 743: MICEAST - 64- JPC. HEADQUARTERS - LICLET, 743: MICEAST - GA- OPE HEADQUARTERS - LICLET, 752: MICEAST, GA- COMPACILER - LICLER 937: MICEAST, MICEAST, MICEAST, MICEAST, 779: MICEAST, GA- SCOMENTERLA 779: MICEAST, GA- SCOMENTERLA 779: MICEAST, GR- SCOMENTERLA 779: MICEAST, GR- SCOMENTERLA 771: MICEAST, GR- SCOMENTERLA 771: MICEAST, GR- SCOMENTERLA 94: HISIN, S-3, MICEAST, MICE AND FLOCE AND FLOCHMENTERLA 94: HISIN, MICEAST, MICHAN, MICHAST, MICHAN, MICHAST, MICHAN, MICHAST, MICHAST, MICHAST, MICHAN, MICHAST, MI	T *LEVELS S BASE CAMP LEJEUNE *LEVEL6 ECTION EAST *LEVEL6 ECTION EAST *LEVEL6 SERVICES *LEVEL6 T * FACILITIES *LEVEL6 NG AND OPERATIONS *LEVEL8 RAINING BATTALION *LEVEL7 ELATIONS *LEVEL6	TR Dela L Save Cancel "Click" save for redirection to the
		organization home page.

- As CDRMs/Staff Section RMs change duty stations, they can edit their "**Region**", "**Installation**", and "**Phone Number**" to reflect their new command/organization
- If you are no longer the CDRM or Staff Section RM for the organization or if your "Role" has changed, to update your status, contact HQMC ARDB/Hartwood Consulting Group Contract Support at <u>smb hqmc rmoutreach@usmc.mil</u>, or through the CROSS application's "Contacts" web part by selecting Tech help Desk Support.
- CDRMs can "EDIT" personnel that fall directly under their hierarchy by selecting the name on the command homepage
- For changes to NAME and EMAIL, contact MCEITS HelpDesk at <u>eishelpdesk@usmc.mil</u>

9.2 CONTACT FEATURE FOR COMMUNICATION

Communication, both internal and external, is key to the successful establishment and maintenance of any RM Program. The contact feature in CROSS allows CDRMs and Subordinate RM Personnel the ability to communicate within their organization to selected Records Managers. Emails can be sent to one or multiple personnel and directly to HQMC ARDB Tech and Help Desk Support.

- Determine the personnel you would like to e-mail by checking the box beside their name
- Select the box for "Selected RMs"
- 3. Type the content of your message in the box
- 4. Select send e-mail

+ MCIPAC_MCASF (MARINE CORPS AIR STATION FUTENMA)		
		Alternate Unit CDRM: Matthews CIV Chikako
+ MCASI (MARINE CORPS AIR STATION IWAKUNI)		Primary Unit CDRM: Kelly 2ndLt Sean P
+ MCBH (MCB HAWAII COMMAND DECK)		Alternate Unit CDRM: Sprung Civ Alfred
+ MCIPAC_MCCS (MARINE CORPS COMMUNITY SERVICES)		
+ MCIPAC_G-3 (OPERATIONS AND TRAINING)		
+ MCIPAC_PACO (PACIFIC AREA COUNSEL OFFICE)		
 MCIPAC_COMMSTRAT (MCIPAC COMMUNICATION STRATE AND OPERATIONS) 	Y	
+ MCIPAC_RCO (REGIONAL CONTRACTING OFFICE)		itaff Section Records Manage Pasindo-Rubio 1stLt Zully
+ MCIPAC_RELMIN (RELIGIOUS MINISTRIES DEPARTMENT)		
+ MCIPAC_SAFETY (SAFETY)		Staff Section Records Manage Omi CIV Sara
+ MCIPAC_SAPR (SEXUAL ASSAULT PREVENTION & RESPONSE		
+ MCIPAC_SJA (STAFF JUDGE ADVOCATE)		
 MCIPAC_H&HSMCASF (HEADQUARTERS & HEADQUARTERS SQUADRON MCAS FUTENMA) 	⊠ —	Primary Unit CDRM: Southworth 1stLt Steven M
<u>Contacts</u>	V	
You can send an email directly by providing an email requested recipients: Tech and Help Desk Support Selected RM	body be	low, and checking the
CDRM meeting is scheduled for 7 November at 1300 in Conference Roor plan to attend.	m 262. Rep	ly back confirming your
Thank you		

9.3 Search CROSS Articles and Documents

As this site continues to develop, content will be added to allow users to access RM information more readily through a search feature. The "**Search Cross Articles and Documents**" tab enables users to view documents through a drop-down menu. It will show available categories rather than relying on the user to type in specific keywords.

	<u>Search C</u>	ROSS Articles and Documents
Select from the list of contents	Select. Bucket Schedule Crosswalk Crosswalk Essential Records FAQ File Plans Policy Record Schedules CROSS Registration SOP Drafts SF-135 CAPSTONE Training End User Audit	Uploaded

Select search topic from the drop-down menu and allow documents to populate

Search CROSS Article	es and Documents
Training 💙	
Training Y	Uploaded
Training Title V3.0 CROSS End User Guide.pdf	Uploaded 2019-12-30

Some of the following resources have been added for Search Related Articles, Documents and Templates:

- Record Schedules
- CROSS Training Instruction
- CROSS End User Guide
- SECNAV Manual
- MCO 5210.11F
- SOP Template
- Audit Template

9.4 FREQUENTLY ASKED QUESTIONS

The ribbon at the top of the command/section homepage provides users access to support features.

Ecommand Records Ope	rational Support Site		
Version 1.7 (clip to view current remase FAQ Condits RM Policy Matrix 2020 CROSS Training Schedule notes)	FAQ Sheet 10: My Organization's hierarchy/structure is incorrect. How do I get it corrected?		
<u>Note:</u> Users have access to system functionality updates and a version history. "Click" the Version	1A: The hierarchy in CROSS is auto populated from DON TRACKER, which is primarily a tasking 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 CDRN to ensure that what is in CROSS is an accurate reflection of day to day business practices. 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 appeal to "XAd Org Hierarchy File." Upload Your correct or garucture here. 20: How do I delete users that are no longer in my organization?		
current and past updates	2A: Currently, CDRMs cannot delete users. It 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 CROS homepage. Please submit your unit name and ID, along with justification for why the user should be removed.		
	30: How do I change my role within CROSS? 3A: Hyou wish to change your role (ex. from primary CRDM to alternate CRMM, please submit a request to the ARDB Helpdex's via the Contacts email box at the bottom left of the CROSS homepage. Please include the role you would like to switch to.		
	4Q: I've moved to a different organization, how do I change my unit?	J	

9.5 RM POLICY MATRIX

Gives users access to a list of current records management policies.

I	Records Management Policy Matrix
	Last updated 10/3/2019
MARADMIN 192/19	Guidance Regarding Out-Processing, Account Management, and Records Requirements for MCEN Users
MARADMIN 485/18	Announcement of SECNAV Notice 5210 for the Implementation of New DON Bucket Records Schedules
MARADMIN 530/15	Department of Navy Tasks, Records, and Consolidated Knowledge Enterprise Repository (DONTRACKER)
MARADMIN 466/15	Marine Corps Command Designated Records Manager Program
MARADMIN 593/12	Mandatory Annual Records Management Training
MARADMIN 491/06	Electronic Records Series and Information System Inventory
44 USC Chapter 21	National Archives and Records Administration
44 USC Chapter 29	Records Management by the Archivist of the United States and by the Administrator of General Services
44 USC Chapter 31	Records Management by Federal Agencies
44 USC Chapter 33	Disposal of Records
OMB M-12-18	Managing Government Records Directive
OMB M-14-16	Guidance on Managing Email
DoDI 5015.02 CH 1	DoD Records Management Program
DoD 5015.02-STD	Electronic Records Management Software Applications Design Criteria Standard
SECNAVINST 5210.8E	Department of the Navy Records Management Program
SECNAV M-5210.1 CH 1	Department of the Navy Records Management Program Records Management Manual
SECNAV M-5210.2	Department of the Navy Standard Subject Identification Code (SSIC) Manual
SECNAV Notice 5210 dtd 29 May 2018	SECNAV Manual 5210.1, Part III
DON Bucket Disposition Schedules	
MCO 5210.11F	Marine Corps Records Management Program
USMC Records Management	
Knowledge Site	
NARA	National Archives and Records Administration
NARA Bulletins:	National Archives and Records Administration Bulletins
NARA Bullotin 2017-01	Agency Records Management Training Requirements

9.6 RM PROGRAM SUPPORT CONTACT LIST

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9.7 CROSS TRAINING SCHEDULE

CROSS TRAINING SCHEDULE 3RD / 4TH QTR 2020

This training will support the USMC Phase I migration to electronic records management. Participants will learn the functionality of the Command Records Operational Support Site (CROSS) in support of policy requirements to create/maintain a records management program and to categorize organization records.

Time	Location		
1300 - 1500	Adobe Connect		
0900 - 1100	Adobe Connect		
1300 - 1500	Adobe Connect		
0900 - 1100	Adobe Connect		
1300 - 1500	Adobe Connect		
0900 - 1100	Adobe Connect		
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1300 - 1500	Adobe Connect		
0900 - 1100	Adobe Connect		
1300 - 1500	Adobe Connect		
0900 - 1100	Adobe Connect		
1300 - 1500	Adobe Connect		
 All trainings will occur virtually via webinar on a Tuesday or Thursday. Requests for a training date should be sent to: <u>dela.ashe.ctr@usmc.mil</u> or <u>leira.ortizvelez.ctr@usmc.mil</u> Participants will receive a confirmation email with access instructions 2-3 days prior to the training date. 			
	Time 1300 - 1500 0900 - 1100 1300 - 1500 0900 - 1100 1300 - 1500 0900 - 1100 1300 - 1500 0900 - 1100 1300 - 1500 0900 - 1100 1300 - 1500 0900 - 1100 1300 - 1500 0900 - 1100 1300 - 1500 0900 - 1100 1300 - 1500 0900 - 1100 1300 - 1500 0900 - 100 1300 - 1500 0900 - 1100 1300 - 1500 0900 - 1100 1300 - 1500 0900 - 1100 1300 - 1500 0900 - 1100 1300 - 1500 uill occur virtually via webinar on a Tuesta a training date should be sent to: dela.a z.ctr@usmc.mil		