

## ERM FAQ Sheet

1. [My organization's hierarchy/structure is inaccurate. How do I get it corrected?](#)
2. [How do I delete users that are no longer in my organization?](#)
3. [How do I change my role within CROSS?](#)
4. [I've moved to a different organization. How do I change my unit?](#)
5. [I cannot find my unit, what should I do?](#)
6. [Why can't I see/edit my file plan?](#)
7. [Can I register to more than one organization at a time?](#)
8. [Do Staff Section RMs need an appointment letter?](#)
9. [How do I view the IG Self-Checklist?](#)
10. [I went to save my file plan and the homepage timed out, erasing all my changes. Why did this occur?](#)
11. [What is the difference Primary/Alternate CDRMs and Staff Section RMs?](#)
12. [I am unable to register in CROSS, my email is not showing correctly, or CROSS keeps telling me to re-register. What should I do?](#)
13. [How do I change my rank in CROSS?](#)
14. [I submitted an account request for CROSS, but it has not been approved. What should I do?](#)
15. [I am unable to view anything within the "Search CROSS Articles and Documents" feature. What should I do?](#)
16. [My organizational leader/section head does not have Non-Judicial Disciplinary Authority \(NJDA\)? Do I still need a records management program?](#)
17. [My command information \(i.e. Training, SOP, Commander, Capstone info\) disappeared; how do I get it back?](#)
18. [There is no RM annual training available on Marine.Net. How does our command meet this requirement?](#)
19. [Did Record Schedules replace SSICs/Have SSICs gone away?](#)
20. [What are the differences between grey and blue subsections?](#)
21. [As a CDRM, how do I move personnel to different section?](#)

# ERM FAQ Sheet

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

**1A:** The hierarchy in CROSS was originally populated from DON TRACKER, a task management system that is not necessarily 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 the offices and staff sections that facilitate their organization's day-to-day records management (RM) practices.

Is the organizational structure in the subsection list correct?

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

Filename	Upload Date
<input type="button" value="Save NJDA Setting"/>	<input type="button" value="+ Add Org Hierarchy File"/>

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. A template can be found in the "Search CROSS Articles and Documents" section within CROSS. We can typically accommodate org structure changes within 48-72 hours.

## 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 CROSS Helpdesk via the **Contacts** tab. Please submit your unit name and ID, along with justification for why the user should be removed (ex. PCS'd, EAS'd, no longer operating in an RM capacity).

## 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 CROSS Helpdesk via the "Contacts" tab at the top 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.

Current User [Forrester CTR Justin \(Click to Edit\)](#)

Name \*  
Forrester CTR Justin

Email \*  
justin.forrester.ctr@usmc.mil

Role \*  
Primary Unit CDRM

Phone Number \*

You have listed the following as your unit: \*  
HQMC\_AR - ADMINISTRATION AND RESOURCE MANAGEMENT DIVISION

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

Version: 1469.0  
Created at 6/3/2021 12:01 PM by  Forrester CTR Justin  
Last modified at 9/20/2021 1:44 PM by  Forrester CTR Justin

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 to see the desired organization listed in **red** and hit "Save."

# ERM FAQ Sheet

**Name \***  
Forrester CTR Justin

**Email \***  
justin.forrester.ctr@usmc.mil

**Role \***  
Primary Unit CDRM

**Phone Number \***  
(540) 210-0119

You have listed the following as your unit: \*  
HQMC\_AR - ADMINISTRATION AND RESOURCE MANAGEMENT DIVISION

**Click to change units**  
(changing units will require a new appt letter from your new unit)

**Find your unit: \***  
465: HQMC\_AR\_ARDB\_RECORDS - HQMC\_AR\_...

The following are the RMs listed for your organization:  
None Listed

Version: 1469.0  
Created at 6/3/2021 12:01 PM by  Forrester CTR Justin  
Last modified at 9/20/2021 1:44 PM by  Forrester CTR Justin

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

- 417: HQMC - HEADQUARTERS MARINE CORPS
- 418: HQMC\_AR - ADMINISTRATION AND RESOURCE MANAGEMENT DIVISION
- 459: HQMC\_AR\_ARDB - PUBLISHING & LOGISTICS MANAGEMENT BRANCH
- 463: HQMC\_AR\_ARDB - RECORDS, REPORTS, DIRECTIVES & FORMS MANAGEMENT SECTION
- 465: HQMC\_AR\_ARDB\_RECORDS - HQMC\_AR\_ARDB RECORDS MANAGEMENT

## 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 ARDB - RECORDS, REPORTS, DIRECTIVES & FORMS MANAGEMENT SECTION \*LEVELS**  
[Click to View Your Organizational Structure](#)

**Find your unit: \***  
463: HQMC\_AR\_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 CROSS Helpdesk via the **Contacts** tab at the top of the CROSS homepage.

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

Organizational Info | IG Self-Checklist | **CMD/Sect File Plan**

**File Plan**  
MCASNR - MARINE CORPS AIR STATION NEW RIVER, NC

Search for Bucket by Topic:

Bucket Topic SSIC

Filter by Chapter:

View All	Schedule #	Title	Itemized by SubOrg	Expand
<input checked="" type="checkbox"/>	1000.3	Military Personnel Information Systems Master Files	SSIC	- All +

**6A:** If you cannot see and/or edit your command file plan, it is because you are in the command level of your organization. Contrary to popular belief, commands do not produce records; rather 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.

## SubSections List

**+ ALL Unit**

**+ MCASNR\_ADJ (MCASNR\_ADJUTANT)**

Organizational Info | **CMD/Sect File Plan**

**File Plan**  
MCASNR\_ADJ MCASNR\_ADJUTANT

Search for Bucket by Topic:

Bucket Topic SSIC

Filter by Chapter:

View All	Schedule #	Title	Itemized by SubOrg
<input checked="" type="checkbox"/>	1000.3	Military Personnel Information Systems Master Files	SSIC

Stored Format:   Records Location(s):

Exclusion/Additional Comments:

# ERM FAQ Sheet

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

**7A:** No. 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: Do Staff Section RMs need an appointment letter?

**8A:** 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.

## 9Q: How do I view the IG Self-Checklist?

**9A:** The automated IG Self-Checklist tab is available to commands only, not subsections (only commands are inspected by the IG). CDRMs do not have the ability to adjust their organization's "command" or Non-Judicial Disciplinary Status (NJDA) status, but may submit a request via the Contacts box at the bottom left of the CROSS homepage. When a command has their NJDA status changed/approved, the IG Self-Inspection checklist tab will become available.

The screenshot shows the 'IG Self-Checklist' tab selected in the top navigation bar. Below the navigation bar, the title 'IG Checklist' is displayed, followed by the organization name 'MCASNR - MARINE CORPS AIR STATION NEW RIVER, NC'. A red notification message states: 'Checklist has updated to reflect a new iteration of the 5210 RM Checklist. CY 2021 29, March.' Below this, there is a 'Filter by SubSection:' dropdown menu currently set to 'Subsection 1 - ELECTRONIC RECORDS MANAGEMENT'. Two buttons are visible: 'Save Changes to Checklist' and 'Print Checklist'. At the bottom, a table shows the checklist status for Sub Section 101, which is 'Compliant'.

Sub Section	Compliance / Comments
101 +	Compliant
Compliant based on Appt Letter Expiration Date	

## 10Q: I went to save my file plan and the homepage timed out, erasing all my changes. Why did this occur?

**10A:** The platform on which CROSS is hosted refreshes every 5 minutes or so. This issue is beyond ARDB's control. Please save early and often in order to mitigate the loss of work.

## 11Q: What is the difference between Primary/Alternate CDRMs and Staff Section RMs?

**11A:** 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 practices 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 the 5210 Functional Area Checklist
5. Overseeing their organization's RM training and uploading training verification (i.e., rosters of all personnel in the unit) to CROSS annually.
6. Auditing subordinate section's RM program(s)/file plan(s)
7. Ensuring that each section has appointed Staff Section RMs

## ERM FAQ Sheet

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 two Alternate CDRMs are needed per organization.
- ❖ **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 plan *for their section*
  2. Communicating with their CDRM regarding RM compliance

**12Q: I am unable to register in CROSS/my email is not showing correctly/CROSS keeps telling me to re-register. What should I do?**

**12A:** CROSS pulls the email directly associated to 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).

<b>Name *</b> Van Corbach CTR Andrew J	<b>Email *</b> andrew.j.vancorbach.ctr@usmc.mil
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If one or both data elements do not appear, contact the CROSS Help Desk via the "Contacts" tab at the top of the CROSS page.

**13Q: How do I change my rank in CROSS?**

**13A:** You will need to contact the CROSS Helpdesk Support at [smb\\_hqmc\\_rmoutreach@usmc.mil](mailto:smb_hqmc_rmoutreach@usmc.mil) or use the "Contacts" tab on CROSS.

**14Q: I submitted an account request for CROSS, but it has not been approved. What should I do?**

**14A:** 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 by-direction delegated authority (i.e., Executive Officer, Chief of Staff). Staff Section RMs are approved by the organizational CDRM. **All approving authorities must have access to CROSS with a CURRENT email address in order to receive and approve/deny your registration request.** If your approving authority does not have a CROSS account, they will first need to request access to CROSS. In the event your approving authority is unable to request access, please contact the CROSS Helpdesk Support at [smb\\_hqmc\\_rmoutreach@usmc.mil](mailto:smb_hqmc_rmoutreach@usmc.mil) or use the "Contacts" tab on CROSS. A registration guide is available for download on the ARDB website: [Records Reports and Directives Management \(marines.mil\)](https://www.marines.mil/Records-Reports-and-Directives-Management)

# ERM FAQ Sheet

## 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
CROSS End User Registration Guide	Instructions for registering to CROSS	<a href="#">Download</a>
CROSS End User Guide	After obtaining access to CROSS, utilize CROSS End User Guide	<a href="#">Download</a>
CROSS FAQ	Contains a list of FAQ related to CROSS	<a href="#">Download</a>
CROSS Slick Sheet	Contains brief overview of CROSS	<a href="#">Download</a>
AISSICCrosswalk V1.2	This document compiles all 13 Record Schedule Chapters, for convenience of use and search when developing a file plan.	<a href="#">Download</a>

**15Q: I am unable to view anything within the “Search CROSS Articles and Documents” feature. What should I do?**

**15A:** 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.

### Search CROSS Articles and Documents

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

Select...

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Title Uploaded

- Name
- 2020\_CROSS TRAINING SCHEDULE\_Q3andQ4
- 3\_23 RM SOP TEMPLATE
- AISSICCrosswalk V1.1
- Audit Report Template
- CO Authorization Letter Template
- DONTracker\_TrainingSeries(August2020)v2
- Essential Records Fact Sheet
- Essential Records Plan
- How to use the Crosswalks
- NA FORM 13170 \_ ARCIS Application
- NAVMC 11786 Instructions
- NAVMC 11786
- Non Records
- QuickSeries\_CDRM
- QuickSeries\_comander
- QuickSeries\_Staff-Sections
- Records Definition
- SlickSheet\_CROSS
- SlickSheet\_MCTILM
- SqdnO 5200.1 Vital Records Program
- Supplemental RM Training

**16Q: My organizational leader/section head does not have Non-Judicial Disciplinary Authority (NJDA)? Do I still need a records management program?**

**16A:** 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.*

**17Q: My command information (i.e., Training, SOP, Commander, Capstone info) disappeared; how do I get it back?**

## ERM FAQ Sheet

**17A:** If you are unable to edit this information, your unit is not considered a command in CROSS. If your unit receives IGMC inspections, then your unit qualifies as a Non Judicial Disciplinary Authority (NJDA) unit. Requests to change your unit's NJDA status may be made by contacting the CROSS Helpdesk Support at [smb\\_hqmc\\_rmoutreach@usmc.mil](mailto:smb_hqmc_rmoutreach@usmc.mil) or use the "Contacts" tab on CROSS. Please provide your unit ID when contacting the Help Desk.

**18Q: There is no RM annual training available on Marine.Net. How does our command meet this requirement?**

**18A:** 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 periodically. CDRMs can also maintain all training rosters in CROSS, if necessary.

**Training:**

Filename		Upload Date	Delete
0102 - ADJ FY21 Training Sept 2020.pdf	Records Management	2021-05-24	X
0102 - ADJ CDRM FY21 16 Nov 2020.pdf	Records Management Training	2021-05-24	X
0102 - ADJ FY21 Training Nov 2020.pdt	Records Management	2021-05-24	X
0103 - Civilian Records Management Training Roster 8 Sep 2021.xlsx		2021-09-09	X
0103 - Command Deck Records Management Training Roster FY2021.pdf		2021-05-25	X

**19Q: Did Record Schedules replace SSICs/Have SSICs gone away?**

**19A:** 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 6,000+ dispositions. Now, DON Record Schedules categorize, or group, SSICs into "buckets" to narrow the list of potential dispositions to 700+. 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" document, available on CROSS under "Search CROSS Articles and Documents," for the entire crosswalk process.

**Step 1:** Utilize Column A to assign an SSIC to your record.

**Step 2** Utilize Column B to determine which Record Schedule (or Bucket) manages your SSIC.

**Step 3:** Utilize Column E to determine the disposition of the assigned Record Schedule.

**Step 4:** Column D features paragraph descriptions that fall under each five to seven 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 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 "AllSSICCrosswalk" document compiles all 13 Record Schedule Chapters, for convenience of use and search when developing a file plan, from the SECNAV Portal [here](#).*

# ERM FAQ Sheet

**20Q: What are the differences between the grey and blue subsections?**

**20A:** Subsections have two color identifications. Blue subsections are sections of your unit that are responsible for the Command's records management compliance. Greyed out subsections are considered NJDA units in CROSS, as they stand their own IGMC inspections. They do not affect your unit's compliance in CROSS but must fall under a command for hierarchy purposes. If there are subsections with the incorrect color identification, contact the "Tech and Help Desk Support" box at the bottom left of the CROSS homepage and request to change the unit's NJDA status. Please provide the unit ID when contacting the Help Desk.

- + MCASNR\_SAFETY (MCASNR\_SAFETY)

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- + MCASNR\_SJA (MCASNR\_STAFF JUDGE ADVOCATE)

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- + MCASNR\_INSP (MCASNR\_INSPECTOR)

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- + MCASNR\_H&HS (MCASNR\_HEADQUARTERS & HEADQUARTERS SQUADRON)

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- + MCASNR\_CNATT (MCASNR\_CNATT)

**21Q: As a CDRM, how do I move personnel to different section?**

**21A:** To move personnel within your unit, select their name from the subsection list.

## SubSections List

+ ALL	Unit	<input type="checkbox"/> ALL	RM's
+	MCASNR_ADJ (MCASNR_ADJUTANT)	<input type="checkbox"/>	Staff Section Records Manager: <b>Robertson CIV Julie A</b>

An edit user box will appear on the screen. Select "Click to Change Units" and type in your unit and section you are looking for (Example: [Unit Name]\_S-1). Select the section when it populates in the drop down box. Click outside the box until you see the organization listed in red and hit save.

Name \*  
Forrester CTR Justin

Role \*  
Primary Unit CDRM

Email \*  
justin.forrester.ctr@usmc.mil

Phone Number \*  
[(540) 210-0119]

You have listed the following as your unit: \*  
HQMC\_AR - ADMINISTRATION AND RESOURCE MANAGEMENT DIVISION

**Click to change units**  
(changing units will require a new appt letter from your new unit)

Version: 1469.0  
Created at 6/3/2021 12:01 PM by  Forrester CTR Justin  
Last modified at 9/20/2021 1:44 PM by  Forrester CTR Justin

Save Cancel

You have listed the following as your unit: \*  
HQMC\_AR\_ARC\_ARDB - RECORDS, REPORTS, DIRECTIVES & FORMS MANAGEMENT SECTION \*LEVELS

**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