

USMC Records Management



QUICK SERIES: FOR CDRMs

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 Command Designated Records Managers (CDRMs), with support from leadership, to ensure their respective organization's successful migration from textual (hardcopy) records to electronic records management (ERM).

Responsibilities: It is the responsibility of the CDRM to oversee their organization/command's RM program in order to ensure that every record is maintained in full compliance with Department of Defense (DoD), Department of Navy (DoN), and USMC policy. CDRMs are also responsible to monitor RM training, disseminate information to their Staff Section RMs, review and update organizational standard operating procedures (SOP), and audit their subordinate staff section RM programs.

Related Quick Series: Commanders, Staff Section RM, 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 individuals 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 for RM. As the CDRM, you have the capability to synthesize your organization's resources in achieving RM compliance. Your most important role is to keep your subordinate Staff Section RMs informed, actively monitor their progress, and ensure they have access to the tools and training 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), an interim ERM solution, and a future long-term 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://usmc.sharepoint-mil.us/sites/USMC_CROSS

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

BRILLIANCE IN THE BASICS

1. Do you have an updated CDRM appointment letter in CROSS?

Required per the 5210 Functional Area Checklist. All appointment letters can be automatically “re-certified” in CROSS upon their expiration.

2. Is your organizational hierarchy complete within CROSS?

Required per the 5210 Functional Area Checklist since all sections must be identified in the organizational hierarchy—even those whose records are managed in other electronic information systems or systems of record.

3. Has your organization assigned Staff Section RMs assigned to 100% of your sections in CROSS?

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

4. Has the “Organizational Info” tab in CROSS been filled out in its entirety (i.e., Capstone billets, Training documentation, Commander Information etc.)?

Filling out this information affects the compliance or discrepancy status of several questions within the IG Self-Inspection Tab.

5. Does your organization have current RM Standard Operating Procedures (SOP) uploaded in CROSS?

Required per the 5210 Functional Area Checklist. An SOP should detail your organization’s plan both to migrate to and implement ERM.

6. Does your organization have a completed file plan in CROSS?

Required per the 5210 Functional Area Checklist. The organizational file plan is a compilation of each staff section’s record schedules. Be sure to include the location and format of your records.

7. Have you identified your SharePoint Site Collection Administrator?

This will be the technical POC (generally someone from the S-6/G-6) responsible for the content control, permissions, and maintenance of your SharePoint. **Note: must be a SNCO or above; the SCA may not dual-hat as the CDRM or vice versa.**

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 - Records Storage



SharePoint Online (SPO)

PHASE III - ERM Preservation



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

GET IN TOUCH

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