



# COMMAND RECORDS OPERATIONAL SUPPORT SITE (CROSS) END USER GUIDE

Version 3.7

02/01/2023

Prepared by:



**HARTWOOD**  
CONSULTING GROUP

## Abstract

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

This guide has been updated to incorporate the latest version of changes and updates to CROSS. For a complete list of system updates, please select the “New” link located in the top ribbon.



# Contents

Version History.....	4
DISCLAIMER NOTICE(S) .....	5
1.0 Purpose and Scope.....	6
2.0 Overview .....	7
3.0 Commander Roles and Responsibilities.....	8
3.1 CDRM Appointment Letter .....	8
4.0 CDRM Roles and Responsibilities.....	9
4.1 Command/Organizational Hierarchy .....	10
4.1.1 Why Are Some Units Grey vice Blue? .....	10
4.1.2 Is Your Unit a Command? .....	10
4.1.3 Organizational Structure .....	11
4.2 Designate Program Support Personnel.....	12
4.2.1 STAFF SECTION RM APPOINTMENT LETTER .....	13
5.0 Organizational Information.....	14
5.1 Electronic Records Management Selection .....	14
5.2 Commander Information .....	14
5.3 Capstone Billets.....	15
5.4 Track Annual Records Management Training Requirement.....	16
5.5 Complete/Update the Organization Standard Operating Procedure (SOP) .....	17
5.6 Conduct Internal Audits/Self-Inspections of the Records Management Program .....	18
5.7 Essential Records .....	19
5.8 Miscellaneous Documents .....	19
6.0 IG Self-Checklist .....	20
7.0 Organizational File Plan .....	21
7.1 Bucket Schedule Directory.....	23
8.0 Staff Section Records Manager Roles and Responsibilities .....	24
8.1 Automated CROSS Walk.....	25
8.2 File Plan.....	25
9.0 Other Features .....	29
9.1 Edit User .....	29
9.2 Contact Feature for Communication .....	31
9.3 Search CROSS Articles and Documents.....	32

9.4 CROSS Ribbon Features..... 32

9.4.2 E-Training ..... 33

9.4.3 RM Policy Matrix..... 33

9.4.4 RM Program Support Contact List ..... 34

9.4.5 CROSS Updates ..... 34

## 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; screen shots and added new content	Dela Ashe
3.0	11/13/2019	Update to Title page; added new content and screenshots of functionality from Sprint 6; deleted MCEITS instructions and Registration instructions	Dela Ashe
3.1	12/06/2019	Added Org Structure Authentication, records schedule details, CDRM auto-populate for RM Staff, Automated SSIC search/Bucket Schedule Crosswalk, added logo and other content	Dela Ashe
3.2	03/09/2020	Update to content, graphics and Bucket Schedule Directory functionality	Dela Ashe
3.3	07/06/2020	Update to CROSS URL, format, TOC, added RM Support page	Dela Ashe
3.4	09/08/2020	Change in format, reorganized headings, edits to content, removed NJDA references	Dela Ashe
3.5	09/23/2021	Updated screenshots and added content to Subsection list (File Plan, FAQ, Training, Updates)	Justin Forrester, Andrew VanCorbach, Maggie Gibbs, Talia Bastien
3.6	03/10/2022	Updated screenshots, removed P2 MCTILM language.	Andrew Van Corbach, Justin Forrester, Christopher Wilson
3.7	02/01/2023	Updated new CROSS link from EIS to SharePoint	Justin Forrester

## DISCLAIMER NOTICE(S)

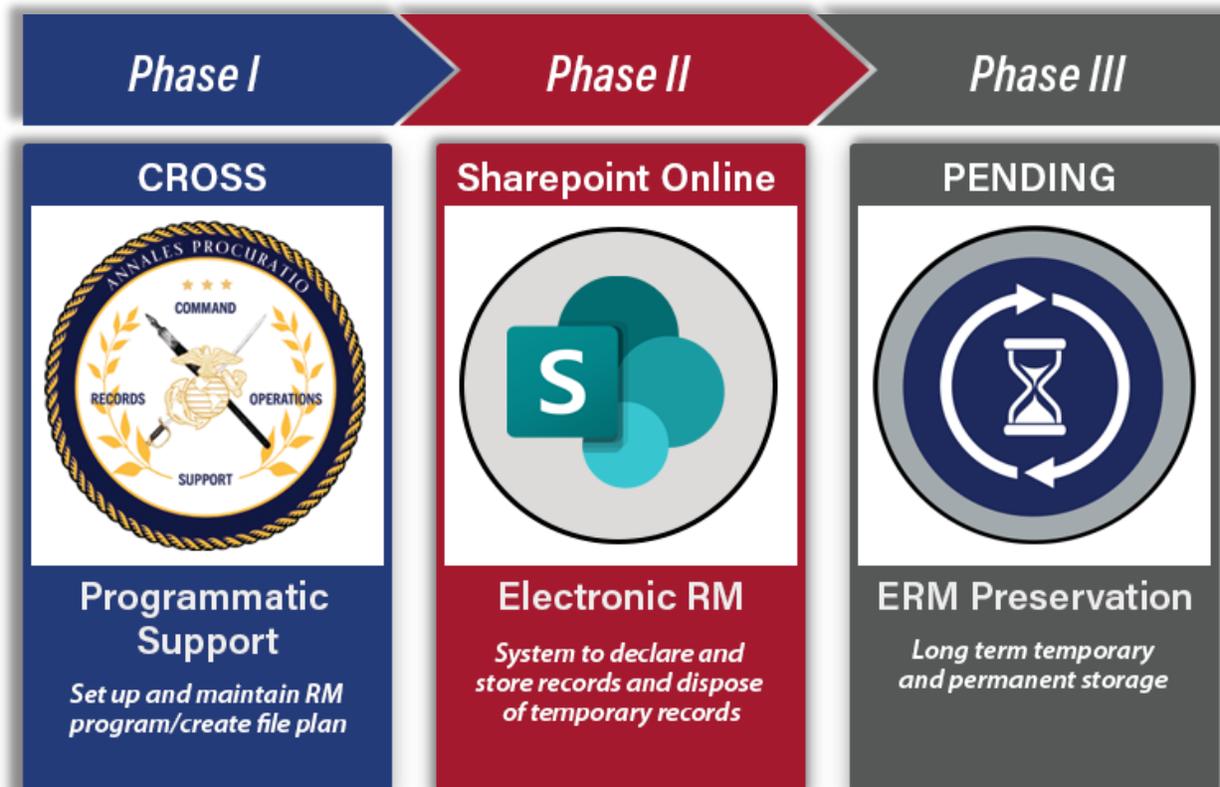
All user interaction should be performed using the main CROSS interface/organizational homepages. Under no circumstances are users to access any backend site pages such the Site Contents or Site Settings. If at any point in time, you accidentally find yourself in any backend system page or library, return to the CROSS homepage immediately via the mail url: ([https://usmc.sharepoint-mil.us/sites/USMC\\_CROSS](https://usmc.sharepoint-mil.us/sites/USMC_CROSS)). **Do not under any circumstances navigate around the site content**, as it is intended strictly for ARDB internal use. Weekly audits are conducted to check for inadvertent modifications to CROSS application in order to maintain data integrity.

**CROSS NOT A RECORDS REPOSITORY. IT DOES NOT MANAGE OR RETAIN RECORDS.** Rather, it is used to tool used to standardize and automate the programmatic functions of records management specific to each organization.



## 1.0 Purpose and Scope

This guide is intended to direct Command Designated Records Managers (CDRMs) and Staff Section Records Managers (SSRMs) through the first phase of migration to electronic records management (ERM). The Office of Management and Budget (OMB) Memorandum 19-21 with Memorandum 23-07 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 30 June 2024**. 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.**



## 2.0 Overview

The Command Records Operational Support Site (CROSS) is a custom SharePoint tool designed to standardize the programmatic construct of Records Management (RM) programs throughout the enterprise. Designed to be a “one stop shop” for all things RM, knowledge management (KM), tools, and resources, CROSS effectively replaces the traditional three-ring turnover binder and automates 5210 Functional Area Checklist (FAC) compliance. Note: CROSS is *not* a records repository.

CROSS further aligns with MCO 5210.11F policy as a means of identifying all USMC records—including their type, format, and location—and giving both the Records, Reports, Directives, and Forms Management Section (ARDB) and the Inspector General (IG) office purview of the overall progress towards electronic records management (ERM). In addition to HQMC oversight, CROSS also aides Command Designated Records Managers (CDRMs) in the creation and sustainment of comprehensive, organization-specific RM programs.

The functionality of CROSS interactively streamlines RM/KM processes for its users while promoting cross-organizational transparency. It also enables organizations to quickly determine the state of their RM programs, oversee staff sections’ areas of responsibility (AORs) within their chain of command, and monitor file plan usage at-a-glance. Additionally, CDRMs and Staff Section Records Managers (SSRMs) can assess IG inspection checklist requirements in order to determine what specific actions are needed to (re)gain program compliance.

CROSS further allows organizations to identify and track their Capstone officials, monitor annual training, and upload RM Standard Operating Procedures (SOPs) and essential records inventories. As its hallmark feature, CROSS requires SSRMS to create their electronic file plans in-site, utilizing the published Standard Subject Identification Code (SSICs) to Department of the Navy (DON) Record (or “bucket”) Schedule crosswalk. CROSS then consolidates the organization file plan by cataloging all records created within each staff section (i.e., AOR) and breaking it down to a more granular level.

Other features of CROSS include access to various RM templates, resources, and materials found under the “Search CROSS Articles and Documents” menu. Users also have access to the Frequently Asked Questions (FAQ) page and the RM Policy Matrix, which hyperlinks all pertinent policies for easy reference.

Finally, CROSS provides the capability for users to interact and communicate with all registered RM personnel within their organization as well as with ARDB for general program assistance and Help Desk support.

## 3.0 Commander Roles and Responsibilities

Commanders at all levels, to include their civilian equivalents (i.e., directors, Deputy Commandants, etc.,) own the RM program for their organization(s), and by direction of MCO 5210.11F, must appoint a CDRM to establish and maintain an RM program. Whereas this process used to occur via hard copy Naval Letter Correspondence, CROSS now automates and combines both the CDRM registration and appointment letter approval processes. As their CDRM's Approving Authority, **commanders must have approved access to CROSS pre-established, in order to receive and electronically sign the autogenerated CDRM appointment letter.** Note: Designated individuals with specified "By-Direction" authority may opt to approve appointment letters in lieu of the commander.

### 3.1 CDRM Appointment Letter

- The appointment of a CDRM should be reviewed annually or upon change of command.
- When a CDRM departs, transfers, or retires from an organization, a new CDRM shall be appointed within 30 days
- When a user requests CDRM permissions, the Commander will receive an email notification. The link provided in the notification will direct the Commander to an appointment letter. An option to approve or deny the request will appear, along with a signature block.
- Once approved, the CDRM will have permissions immediately.

The image shows a screenshot of an email appointment letter from the United States Marine Corps. The letter is addressed to Van Corbach CTR Andrew J and is titled 'APPOINTMENT as Primary Unit CDRM'. It includes a list of duties and points of contact for the appointee.

**UNITED STATES MARINE CORPS**

IN REPLY REFER TO:  
5210  
Adj  
2/11/2022

From: Commanding Officer, MCASNR - MARINE CORPS AIR STATION NEW RIVER, NC  
To: Van Corbach CTR Andrew J  
Subj: APPOINTMENT as Primary Unit CDRM  
Ref: (a) MCO 5210.11F  
(b) SECNAV M-5210.1

1. Per the references, you are appointed as a(n) Primary Unit CDRM. You are directed to become familiar with the references and all other pertinent/applicable directives or instructions.

2. Duties include but are not limited to:

- Oversee and implement respective records management programs throughout the command, (i.e., ensure records are properly managed in all staff sections).
- Oversee and implement a vital records program.
- Implement policy to ensure protection of organizational records in compliance with legal and statutory requirements.
- Ensure all personnel (military, civilian [union and non-union], and contractor support) annually receive records management training (i.e., Record's Management Every Marine's Responsibility, available on MarineNet and TWMS).
- Ensure appropriate and sufficient network and repository resources are available to execute records management processes in accordance with this Order.
- Promote timely transfer of records as outlined in chapter 3 of reference (a).
- Ensure organization records management practices comply with the Inspector General of the Marine Corps (IGMC) Functional Area Checklist 5210.
- Ensure the maximum use of electronic filing methods vice paper filing, when possible, (i.e., implementation of MCTILM).
- Maintain a command turnover for this program.

3. Points of Contact

- Name: Van Corbach CTR Andrew J
- Phone: 262-391-4241
- Email: andrew.j.vancorbach.ctr@usmc.mil

4. This letter supersedes all previous correspondence. This appointment will remain in effect until appointee has been relieved of the duty or a change of command has occurred, whichever is soonest.

## 4.0 CDRM Roles and Responsibilities

CDRMs create and manage the organization’s RM program, utilizing the functionality within CROSS to provide oversight of all programmatic requirements.

- Ensure the organization’s homepage in CROSS is update to (i.e., hierarchy, all staff sections identified/consolidated appropriately)
- Generate and maintain Standard Operating Procedures (SOP) to standardize record keeping practices, communicate transitional practices towards ERM, and to provide direction to organizational personnel
- Track annual training requirements
- Track Capstone officials (if applicable)
- Conduct internal audits/inspections for subordinate staff sections
- Serve as the liaison for RM information, tools, and resources
- Create/maintain an essential records program
- Approve/assign SSRM registration requests

The CDRM Homepage is the landing page for all 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 Letters, “**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**”

**RMs for 914: MCASNR - MARINE CORPS AIR STATION NEW RIVER, NC**

RMs	Appt Letter
Primary Unit CDRM: Forrester CTR Justin	2021-06-03
Primary Unit CDRM: Parkins CIV Megan	2021-02-23
Alternate Unit CDRM: Shannon 1stLt Asia	2020-10-14
Alternate Unit CDRM: Rozeck CIV Danny	2021-02-03

**SubSections List**

Unit	RMs	Appt Letter	Has FilePlan
MCASNR_ADJ (MCASNR_ADJUTANT)	Staff Section Records Manager: Robertson CIV Julie A	2021-02-23	✓
MCASNR_COMP (MCASNR_COMPROLLER)	Staff Section Records Manager: Ramsey CIV Karen W Staff Section Records Manager: Metcalf CIV Rhonda A Staff Section Records Manager: Stranz CIV Rebecca C	2021-02-16 2020-11-17 2020-11-18	✓ ✓ ✓
MCASNR_I&E (MCASNR_INSTALLATION & ENVIRONMENT)	Staff Section Records Manager: Hladky CIV Christine M	2021-02-16	✓
MCASNR_S1 (MCASNR_S-1 PERSONNEL)	Staff Section Records Manager: Graham CIV Aaron K Staff Section Records Manager: McKinney CIV Troy D	2021-02-16 2021-02-23	✓ ✓

**Organization Information**

MCASNR - MARINE CORPS AIR STATION NEW RIVER, NC

**Unit Info**

Types of ERM (Electronic Records Management) Utilized

MC2TILM (Marine Corps Total Information Lifecycle Management)  Local SharePoint

DON TRACKER  Share Drive

Other

Specify:

Is the organizational structure in the subsection list correct?

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

Filename:  Upload Date:

CDRM Organizational Structure\_914 MCASNR.xlsx 2020-02-24

Save ERM Selections

## 4.1 Command/Organizational Hierarchy

CROSS provides a starting hierarchy for each organization, derived from the organization structure. 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 [smb\\_hqmc\\_rmoutreach@usmc.mil](mailto:smb_hqmc_rmoutreach@usmc.mil) or through the CROSS Contacts feature to determine how best to complete your organization structure.

### SubSections List

+ ALL	Unit	<input type="checkbox"/> ALL	RMs	Appt Letter	Has FilePlan
+	MCASNR_ADJ (MCASNR_ADJUTANT)	<input type="checkbox"/>	Staff Section Records Manager: <a href="#">Robertson CIV Julie A</a>	2021-02-23	✔
+	MCASNR_COMP (MCASNR_COMPROLLER)	<input type="checkbox"/>	Staff Section Records Manager: <a href="#">Ramsey CIV Karen W</a>	2021-02-16	✔
		<input type="checkbox"/>	Staff Section Records Manager: <a href="#">Metcalf CIV Rhonda A</a>	2020-11-17	
		<input type="checkbox"/>	Staff Section Records Manager: <a href="#">Stranz CIV Rebecca C</a>	2020-11-18	

### CDRM REQUIRED ACTION(S):

- Select the “+” sign next to the unit/section name to view additional organizational levels. Users are able to view two hierarchies down from their assigned unit/section.
- Review and verify the Command/ Organization hierarchy
- Contact HQMC ARDB Contract Support to make changes, i.e. to delete personnel, add/remove sections, change nomenclature through the Organizational Tab

#### 4.1.1 Why Are Some Units Grey vice Blue?

The grey units in your Subsection list are commands in CROSS. Their compliancy with CROSS does not affect your unit’s compliancy. All sections in blue are the CDRM’s responsibility to ensure they meet the requirements.

#### 4.1.2 Is Your Unit a Command?

You must first identify if your unit is considered a command in CROSS. If a command meets the qualifications of the below, then they are considered an NJDA Command.

**Non-Judicial Disciplinary Authority (NJDA):** The ability to impose Non Judicial Punishment designates those units who qualify to be IGMC inspected from those that do not. Only NJDA units can view the IG Self-Inspection tab. As an NJDA unit, the command file plan is a consolidated “roll-up” of their subordinate staff section(s) file plans. This means that CDRMs do not have the ability to edit file plans at the command level--their staff section RMs must create file plans at their section level. Non-NJDA units are required to have a file plan and maintain records in accordance with all pertinent RM policy; however, as they are not inspectable by IGMC, they are not required to view and/or maintain the 5210 Checklist.

### 4.1.3 Organizational Structure

Your organizational structure identifies sections of your unit that produces records. Following verification of the organization hierarchy accuracy, CDRMs can change their organization 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

**Organization Information**  
MCASNR - MARINE CORPS AIR STATION NEW RIVER, NC

Unit Info

Types of ERM (Electronic Records Management) Utilized

MCTILM (Marine Corps Total Information Lifecycle Management)  Local SharePoint

DON TRACKER  Share Drive

Other

Specify:

Is the organizational structure in the subsection list correct?

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

Filename	Upload Date
CDRM Organizational Structure_914 MCASNR.xlsx	2020-02-24

2021-02-23  
2020-10-14  
Upload Org Hierarchy

Choose File No file chosen Upload

Example of Hierarchy Doc

	A	B	C	D
1	PARENT ORG LONGNAME	ORG 1 LONGNAME(SHORTNAME)		
2		ORG 2 LONGNAME(SHORTNAME)		
3				
4	RMs			Has File
5		ORG 2_SUBORG1 LONGNAME(SHORTNAME)		
6		ORG 3 LONGNAME(SHORTNAME)		
7	Section Records Manager:	ORG 3_SUBORG1 LONGNAME(SHORTNAME)		
8		ORG 3_SUBORG2 LONGNAME(SHORTNAME)		
9	PARENT ORG 2 LONGNAME	ORG 4 LONGNAME(SHORTNAME)		
10		ORG 4_SUBORG1 LONGNAME(SHORTNAME)		
11	Section Records			
12	asey CIV Karen W		SUBORG1_NEXTSUBORG1 LONGNAME(SHORTNAME)	
13	Section Records Manager:		SUBORG1_NEXTSUBORG2 LONGNAME(SHORTNAME)	

- Select “Add Org Hierarchy file” and “Choose File” to upload a PDF, or Excel Spreadsheet with the correct organizational structure
- Select “Upload”

**NOTE: 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
- Site Collection Administrator (SCA)

CROSS provides CDRMs the capability to view an electronic roster of RM Personnel. Their appointment letters are stored next to the user's name. **Only Staff Section Records Managers should be assigned to sections of the unit.**

SubSections List

+ ALL	Unit	<input type="checkbox"/> ALL	RMs	Appt Letter	Has FilePlan
+	MCASNR_ADJ (MCASNR_ADJUTANT)	<input type="checkbox"/>	Staff Section Records Manager: Robertson CIV Julie A	2021-02-23	✓
+	MCASNR_COMP (MCASNR_COMPROLLER)	<input type="checkbox"/>	Staff Section Records Manager: Ramsey CIV Karen W	2021-02-16	✓
		<input type="checkbox"/>	Staff Section Records Manager: Metcalf CIV Rhonda A	2020-11-17	
		<input type="checkbox"/>	Staff Section Records Manager: Stranz CIV Rebecca C	2020-11-18	

### CDRM REQUIRED ACTIONS

- Identify and approve 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.).
- Contact HQMC ARDB Contract Support Personnel for corrections or to delete personnel who may have changed duty stations.

**NOTE: 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 914: MCASNR - MARINE CORPS AIR STATION NEW RIVER, NC**

RMs	Appt Letter
Primary Unit CDRM: Forrester CTR Justin	2021-06-03
Primary Unit CDRM: Perkins CIV Megan	2021-02-23
Alternate Unit CDRM: Shannon 1stLt Asia	2020-10-14
Alternate Unit CDRM: Rozeck CIV Danny	2021-02-03

**CDRM List**

**SubSections List**

+ ALL	Unit	<input type="checkbox"/> ALL	RMs	Appt Letter	Has FilePlan
+	MCASNR_ADJ (MCASNR_ADJUTANT)	<input type="checkbox"/>	Staff Section Records Manager: Robertson CIV Julie A	2021-02-23	✓
+	MCASNR_COMP (MCASNR_COMPROLLER)	<input type="checkbox"/>	Staff Section Records Manager: Ramsey CIV Karen W	2021-02-16	✓
		<input type="checkbox"/>	Staff Section Records Manager: Metcalf CIV Rhonda A	2020-11-17	
		<input type="checkbox"/>	Staff Section Records Manager: Stranz CIV Rebecca C	2020-11-18	

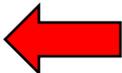
**Staff Section  
Records Managers**

**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 autogenerated 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.

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.

**Staff Section Records Manager:** **Mcmanus CIV Melissa A** 2020-09-11 Update 

All users have the ability to update their appointment letters by selecting the “Update” button. This will update your appointment to reflect the new date of approval.

## 5.0 Organizational Information

The Organizational Info tab identifies important information that is 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.

### CDRM REQUIRED ACTIONS

- Select the Types of ERM Utilized
- Verify/Upload Org Structure
- Identify/Update Commander info
- Add Capstone Billet(s)
- Upload Training Docs
- Upload SOP
- Add Audit Docs
- Add Essential Records Inventory

**NOTE: By selecting each “HEADING”, an explanation of that feature will show.**

## 5.1 Electronic Records Management Selection

Per MCBUL 5210, 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**
- **SAVE** your ERM Selections

## 5.2 Commander Information

Commanders own the RM program for their organization. In CROSS, you must identify your Commander by inputting their information in the Commander section.

- Type your Commander’s name, title, rank, and email in the corresponding boxes.
- Select the **“UPDATE CDR”** button to Add Commander information.

### 5.3 Capstone Billets

Capstone billets are senior officials that are generally responsible for agency and program policy and mission related actions. These billets are typically your General Officers, Senior Executive Service, O-6 Legal Support Services Sections personnel, aide-de-camps, or other positions that affect policy and operations at a higher level.

- The **Add Capstone Billet** tab enables CDRMs to designate and upload their Capstone Official information for applicable Commands only.

#### Capstone:

Billet	Incumbent	Email
There are no Capstone Billets in this organization		



- Fill in the required information (Billet, Name, and Email) and select the **“Add”** button.

**NOTE: For applicable Commands, known Commander Information and Capstone billets have been added/pre-populated (as shown in blue). CDRMs 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)

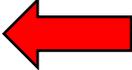
## 5.4 Track Annual Records Management Training Requirement

Access computer-based training is available on the Total Workforce Management Site (TWMS), titled "RECORDS MANAGEMENT IN THE DON: EVERYONE'S RESPONSIBILITY". An upload of your unit's annual training roster will need to occur to demonstrate the organization's completion. It is recommended to coordinate with your training section to acquire this roster. Records Management Training is a fiscal year requirement.

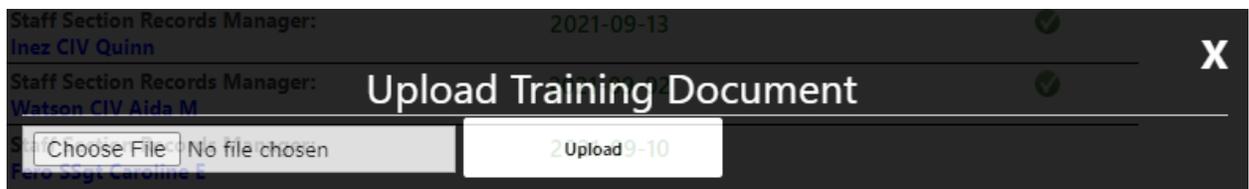
- Once the unit's training roster is acquired, select "+Upload Training Docs"

**Training:**

Filename	Upload Date	Delete
<a href="#">CPLO_TRAINING ROSTER_2021.pdf</a>	2021-09-08	<a href="#">X</a>
<a href="#">MA RECORDS MANAGEMENT TRAINING ROSTER 2021.pdf</a>	2021-09-08	<a href="#">X</a>

[+ Upload Training Docs](#) 

- Select your file after clicking "Choose File"



- Once selected, click "Upload" and the document will now appear under the training section.
- If a document needs to be removed from your CROSS page, select the "X" button under the delete column.

Delete

[X](#)

---

[X](#)

---

## 5.5 Complete/Update the Organization Standard Operating Procedure (SOP)

CDRMs have the ability to upload the unit's SOP to CROSS. This must explain how the unit intends to utilize electronic records management. A template is provided under the CROSS Articles and Document section to assist units.

**SOPs:**

Filename	Upload Date	Delete
<a href="#">ASO 3030.1_MCASCP COOP.pdf</a>	2021-09-10	<b>X</b>
<a href="#">MCASCP COOP SOP 17MAR2020.pdf</a>	2021-09-10	<b>X</b>

**+ Upload SOP Docs**

- Select “**+Upload SOP Docs**”



- Once selected, click “**Upload**” and the document will now appear under the SOP section.
- If a document needs to be removed from your CROSS page, select the “**X**” button under the delete column.

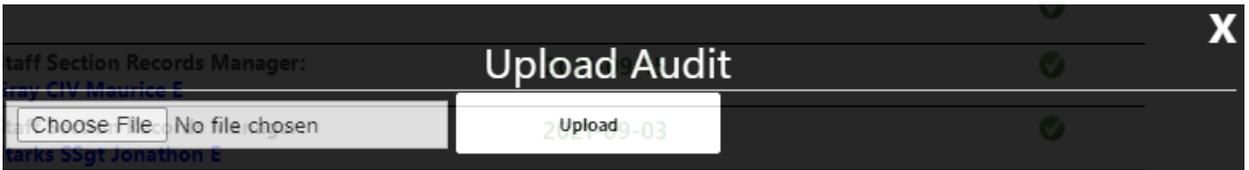
## 5.6 Conduct Internal Audits/Self-Inspections of the Records Management Program

CDRMs have the ability to conduct internal audits or self-inspections of their command. This is the unit's policy on how and when the audits are conducted. To maintain a history of previous audits/inspections, an "Audits" section was created. A template can be found in the "Search CROSS Articles and Documents" section of CROSS.

### Audits:

Filename	Upload Date	Delete
<input type="button" value="+ Add Audit File"/>		

- Select "+Add Audit File"
- Once selected, click "Upload" and the document will now appear under the SOP section.



- If a document needs to be removed from your CROSS page, select the "X" button under the delete column.

## 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. 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 304 of the 5210 Checklist, **INVENTORY THE ESSENTIAL RECORD(S) ANNUALLY** to determine if it continues to meet operational responsibility.

## 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 a record retention solution
- Essential Records Inventory
- Additional records management documents not listed above.

## 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.

1. “Filter by Subsection” allows CDRMs to file the drop down to the specific subsection you want to view.
2. Selecting the item number (101, 102, ...) will display a description of the checklist’s questions.

Sub Section	Compliance / Comments
101 +	Compliant
102	Compliant
103	Compliant
104	Compliant
105	Compliant
106	Compliant
107	Compliant
108	Compliant
109	Compliant
110	Compliant

3. When editing the compliance drop down, CDRMs have the ability to choose the appropriate compliance of the corresponding questions. Those options will be a green “**Compliant**”, a red “**Finding**”, or a yellow “**Discrepancy**”.

**Note: Ensure that the changes are saved by selecting “Save Changes to Checklist.”**

## 7.0 Organizational File Plan

Per MCO 5210.11F, all commands/organizations are required to maintain a file plan that annotates all the records created within their organization, utilizing the appropriate Record (or Bucket) Schedules.

**While oversight of the overall command/organizational file plan is the responsibility of the CDRM, it is the SSRMs who are responsible to input the information directly!**

- 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 electronic format

Schedule #	Title	Itemized by	SubOrg	Expand
1000-1	Policy, Strategy, and Planning	SSIC		+
1000-2	Official Military Personnel File (OMPF)	SSIC		+
1000-3	Military Personnel Information Systems Master Files	SSIC		+

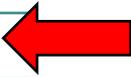
Schedule #	Title	Itemized by	SubOrg	Expand
1000-1	Policy, Strategy, and Planning	SSIC		- All
-- 3702: CROSSTEST2_SUBORG1LEVEL3 CROSSTEST2_SUBORG1LEVEL3 Format: Electronic Location: SharePoint Comments/Exclusions:				
1000-2	Official Military Personnel File (OMPF)	SSIC		-
-- 3702: CROSSTEST2_SUBORG1LEVEL3 CROSSTEST2_SUBORG1LEVEL3 Format: Electronic Location: OMPF Comments/Exclusions:				
1000-3	Military Personnel Information Systems Master Files	SSIC		-
-- 3702: CROSSTEST2_SUBORG1LEVEL3 CROSSTEST2_SUBORG1LEVEL3 Format: Electronic Location: ShareDrive Comments/Exclusions:				

- Upon initial load, the file plan list will display collapsed. Select “**Expand All**” or click the individual “+” to view the more granular data associated to each Record Schedule.

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.

**+ View All Schedule #**

- 1000-1
- 1000-2
- 1000-3

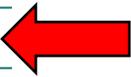


- Click on the Record Schedule # to view the description within CROSS.
- Select the **Title** to view the record retention and disposition (permanent vs. temporary/cutoff period/transfer or destroy procedures).

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

**+ View All Schedule # Title**

Schedule #	Title
<input checked="" type="checkbox"/> 1000-1	<a href="#">Policy, Strategy, and Planning</a>
<input checked="" type="checkbox"/> 1000-2	<a href="#">Official Military Personnel File (OMPF)</a>
<input checked="" type="checkbox"/> 1000-3	<a href="#">Military Personnel Information Systems Master Files</a>



- Selecting “**SSIC**” will display all the SSICs associated to that specific Records Schedule.

1000-2: Official Military Personnel File (OMPF)

1070.1a: PERSONNEL RECORDS

1070.1b: PERSONNEL RECORDS

1070.3a: PERSONNEL RECORDS

1070.3b: PERSONNEL RECORDS

1770.1a(1): CASUALTIES AND SURVIVORS' BENEFITS RECORDS

1770.1a(2): CASUALTIES AND SURVIVORS' BENEFITS RECORDS

1770.2a(1): CASUALTIES AND SURVIVORS' BENEFITS RECORDS

1770.2a(2): CASUALTIES AND SURVIVORS' BENEFITS RECORDS

1770.2a(3): CASUALTIES AND SURVIVORS' BENEFITS RECORDS

Search CROSS Articles and Documents

Uploaded

Filter by Chapter: Select...

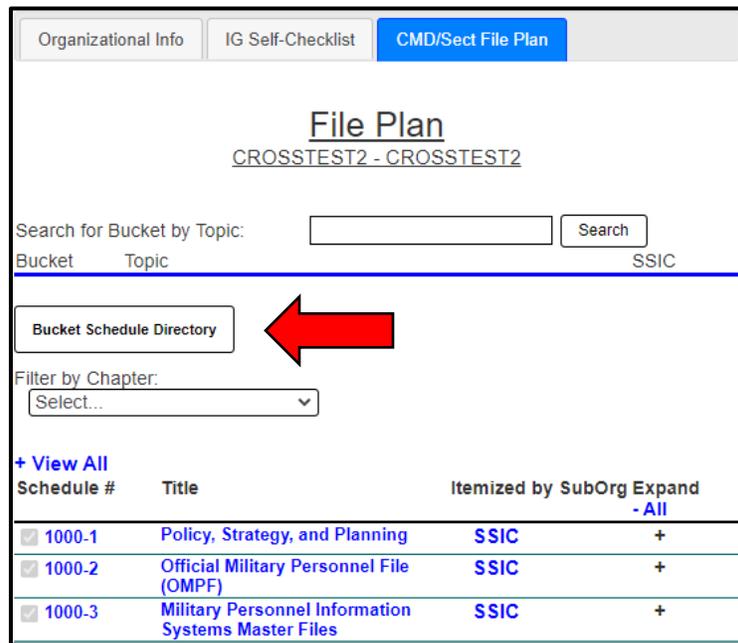
**+ View All**

Schedule #	Title	Itemized by SubOrg
1000-1	<a href="#">Policy, Strategy, and Planning</a>	<a href="#">SSIC</a>
1000-2	<a href="#">Official Military Personnel File (OMPF)</a>	<a href="#">SSIC</a>
1000-3	<a href="#">Military Personnel Information Systems Master Files</a>	<a href="#">SSIC</a>



## 7.1 Bucket Schedule Directory

This piece of functionality provides a tailored a search/view of every record schedule utilized by every USMC organization in CROSS. This is particularly useful for Freedom of Information Act or legal personnel attempting to locate specific command records. Rather than “mass blast” an inquiry to the major subordinate commands (MSCs) and wait for the tasker to “trickle-down” the chain of command, CROSS users can easily locate which organizations manage “x” records with a few simple keystrokes!



- Select “**Bucket Schedule Directory**” under the “**CMD/Sect File Plan**” tab

Show  entries

Search:  **1**

Bucket	Description	Unit	Stored Format
1000-14	Information relating to accounting for Navy Reserve personnel/workforce including but not limited to monthly statements of individual assignments, Navy Reserve drill chits/diaries, and Navy Reserve data cards. This does not include Navy Reserve Unit/Ship Rolls and Rosters which are included under item 1000-5, Personnel Accounting (Permanent).	6110:WEAPONS COMPANY 6106:GOLF COMPANY 6101:FOX COMPANY 6096:EASY COMPANY 6077:HEADQUARTERS AND SERVICE COMPANY 1273:MARINE CORPS INSTALLATIONS WEST-MARINE CORPS BASE CAMP PENDLETON_G-3/5 OPERATIONS & PLANS 6078:HEADQUARTERS AND SERVICE COMPANY_S-1 8073:MALS-41_S-1 8079:VMM-764_S-1 4377:MARINE MEDIUM TILTROTOR SQUADRON 764 8085:MWSS-473_S-1 4391:MARINE AVIATION LOGISTICS SQUADRON 473 3931:3D MAR DIV_HQ BN_HEADQUARTERS COMPANY 3752:3D MARDIV_HQBN_JUNGLE WARFARE TRAINING CENTER 4244:8THMCD_RS_PHEONIX 6499:MARINE AVIATION DETACHMENT PATUXENT RIVER_S_1 8102:4TH MCD_S-1 ADJUTANT 3925:3D MAR DIV_HQ BN_HEADQUARTERS COMPANY_S-1 4378:MARINE AVIATION LOGISTICS SQUADRON 41	Electronic Microsoft Teams Electronic Microsoft Teams Electronic Microsoft Teams Electronic Microsoft Teams Electronic Microsoft Teams Both Electronic iAPS Both MALS-41 S-1 Microsoft Teams/File Cabinets Both VMM-764 S-1 Microsoft Teams/File Cabinets Both VMM-764 S-1 Microsoft Teams/File Cabinets Both MWSS-473 S-1 Microsoft Teams/File Cabinets Both MWSS-473 S-1 Microsoft Teams/File Cabinets Electronic SHAREDRIIVE Electronic SHAREDRIIVE Electronic Sharepoint Electronic https://myteam.navair.navy.mil/ad/mad/S1FOUO/Electronic%20File%20Plan Electronic Electronic Sharedrive Electronic MALS-41 EXECUTIVE OFFICER
<b>2</b> 1000-5	Information relating to recommendation, review, and approval or disapproval of military awards. This includes but is not limited to awards program case files, awards program master record, and related information.		
11000-5	Information that		

**3** 1000-5: Awards Program

1. Type in the desired keyword or specific record schedule in the “**Search**” box. In this example, the user searched for Record Schedule 1000-5.
2. Select the appropriate Bucket (or Record) Schedule on the left in [blue](#)
3. When the page refreshes, all commands/organizations with records under that schedule (1000-5) annotated in their file plan will populate on the right.

In this example, you will notice that CROSS not only produces the organization ID, but the format and location of the records as well. This information allows users to contact the organization CDRM directly for records, rather than mass-blasting taskers to the entire enterprise or MSC.

## 8.0 Staff Section Records Manager Roles and Responsibilities

SSRMs are designated to assist CDRMs in the execution of their RM program responsibilities and serve as the RM point of contact (POC) for the members of their staff section or office.

### REQUIRED ACTIONS

- **CATEGORIZE** and **CROSSWALK** their respective section/office’s records by **type** (temporary or permanent) and by **Record Schedule**. *Note: “Crosswalk” is a term used to align Standard Subject Identified Codes (SSICs) to their corresponding Record Schedule(s).*

**RECALL:** While SSICs are still used for purposes of Naval Letter correspondence (content categorization), Record Schedules now supersede and have replaced SSIC retention and disposition schedules. *Note: retention refers to how long an organization is legally obligated to keep a record; disposition determines when the record will be destroyed (temporary records) or transferred to NARA for permanent preservation/retirement (permanent records).*

**Reference:** USMC training material, “**Records Management: Everyone’s Responsibility,**” using the Search CROSS Articles and Documents feature.

- **CREATE A SECTION 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, etc.) and **WHEN** the record will be disposed (i.e. cutoff at 10 years and transfer to NARA).
- **UPDATE** the SSRM appointment letter annually (all appointment letters “reset” on 1 Jan each year).

Staff Section Records Manager:  
[Rankin SSgt Arlene](#)

2020-10-27

Update

- **COMMUNICATE** regularly with the organizational CDRM(s) and **SERVE** as a conduit of information from the CDRM to other section/office personnel (Active Duty, Civilians, Contractors).

## 8.1 Automated CROSS Walk

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:** Awards citations use SSIC 1650 to identify the record's content, however it should be filed under Record Schedule 5000-8 (Directives Case Files).

**CROSS provides users the ability to automatically "crosswalk" SSICs to Record Schedules via the File Plan functionality.**

- Under the "CMD/Section File Plan" tab, use the "**Search for Bucket by Topic**" feature to look up SSICs and Bucket (or Record) Schedules by subject or key word.

**Ex: When typing in the keyword "policy," a list of all SSICs and Record Schedules containing the word "policy" will display below.**

- Locate the desired SSIC on in the far right column (1120.1) and crosswalk to the corresponding Record Schedule in the far left column. Annotate the record schedule number (1000-34) in the section file plan.

Bucket	Topic	SSIC
1000-1	Policy, Strategy, and Planning	1000-1
1000-29	RECRUITING PLANS AND POLICY RECORDS	1120.2
1000-29	RECRUITING POLICY RECORDS	1121.2
1000-34	RECRUITING PLANS AND POLICY RECORDS	1120.1
1000-34	RECRUITING POLICY RECORDS	1121.1

## 8.2 File Plan

Contrary to current and historical practices, file plans are not the responsibility of the CDRM. It is simply not practical nor sustainable for one or two people to identify and track every single record schedule (including its retention and disposition) across every single staff office/section within an organization. Instead, each staff office/section (and their SSRM) is responsible for the records within their respective AOR(s). The aggregate section file plans then "roll up" to inform the overall command (organizational) file plan.

For CROSS purposes, file plans are managed by the SSRMs for each unit (in blue) in the Subsection List. *Note: Units in grey are commands entities (NJDA's) for which the file plan designation does not apply.* If a file plan already exists for that section, a green “Checkmark” icon will appear in the “Has File Plan” column. In the event a file plan has not yet been created, a red “X” icon will indicate non-compliance.

SubSections List					
+ ALL	Unit	<input type="checkbox"/> ALL	RMs	Appt Letter	Has FilePlan
+ ALL	MCASNR_ADJ (MCASNR_ADJUTANT)	<input type="checkbox"/>	Staff Section Records Manager: Robertson CIV Julie A	2021-02-23	✓
+ ALL	MCASNR_COMP (MCASNR_COMPROLLER)	<input type="checkbox"/>	Staff Section Records Manager: Ramsey CIV Karen W	2021-02-16	✓
		<input type="checkbox"/>	Staff Section Records Manager: Metcalf CIV Rhonda A	2020-11-17	
		<input type="checkbox"/>	Staff Section Records Manager: Stranz CIV Rebecca C	2020-11-18	
+ ALL	MCASNR_I&E (MCASNR_INSTALLATION & ENVIRONMENT)	<input type="checkbox"/>	Staff Section Records Manager: Hladky CIV Christine M	2021-02-16	✓
+ ALL	MCASNR_S1 (MCASNR_S-1 PERSONNEL)	<input type="checkbox"/>	Staff Section Records Manager: Graham CIV Aaron K	2021-02-16	✓
		<input type="checkbox"/>	Staff Section Records Manager: McKinney Civ Troy D	2021-02-23	
+ ALL	MCASNR_S-3 (MCASNR_S-3 OPERATIONS )	<input type="checkbox"/>	Staff Section Records Manager: WITTNER CIV THERESA	2021-01-07	✓
+ ALL	MCASNR_S-4 (MCASNR_S-4 LOGISTICS FACILITIES/SUPPLY/DINING/ORDNANCE)	<input type="checkbox"/>	Staff Section Records Manager: Mcmanus CIV Melissa A	2021-09-29	✓
+ ALL	MCASNR_S-6 (MCASNR_S-6 COMMUNICATIONS & INFORMATION SYSTEMS)	<input type="checkbox"/>	Staff Section Records Manager: Bos MSgt Timothy	2020-12-10	✓
+ ALL	MCASNR_SAFETY (MCASNR_SAFETY)	<input type="checkbox"/>	Staff Section Records Manager: Jensen CIV David S	2021-03-05	✓
		<input type="checkbox"/>	Staff Section Records Manager: Walker CIV Michael	2020-11-20	
+ ALL	MCASNR_SJA (MCASNR_STAFF JUDGE ADVOCATE)	<input type="checkbox"/>	Staff Section Records Manager: Yables Civ William	2021-01-11	✓
+ ALL	MCASNR_INSP (MCASNR_INSPECTOR)	<input type="checkbox"/>	Staff Section Records Manager: Strachan CIV David J	2021-03-03	✓
		<input type="checkbox"/>	Staff Section Records Manager: Kongsuwan CIV Emily	2020-12-29	
+ ALL	MCASNR_H&HS (MCASNR_HEADQUARTERS & HEADQUARTERS SQUADRON)	<input type="checkbox"/>	Primary Unit CDRM: Henriquez CIV Jose A	2021-03-05	
+ ALL	MCASNR_CNATT (MCASNR_CNATT)	<input type="checkbox"/>	Primary Unit CDRM: Russ SSgt Porsha D	2021-08-13	
- ALL	MCASNR_H&HS (MCASNR_HEADQUARTERS & HEADQUARTERS SQUADRON)	<input type="checkbox"/>	Primary Unit CDRM: Henriquez CIV Jose A	2021-03-05	
- ALL	(MCASNR_HEADQUARTERS & HEADQUARTERS SQUADRON_ADMIN/LEGAL)	<input type="checkbox"/>	Staff Section Records Manager: Sanchez CIV Jeisha K	2021-10-22	
- ALL	(MCASNR_HEADQUARTERS & HEADQUARTERS SQUADRON_CAREER PLANNER)	<input type="checkbox"/>	Staff Section Records Manager: Rankin SSgt Arlene	2020-10-22	Update
- ALL	(MCASNR_HEADQUARTERS & HEADQUARTERS SQUADRON_TRAINING)	<input type="checkbox"/>	Staff Section Records Manager: Rojo Sgt Romeo	2021-10-22	✓
- ALL	(MCASNR_HEADQUARTERS & HEADQUARTERS SQUADRON_GROUND SAFETY)	<input type="checkbox"/>	Staff Section Records Manager: Hendee GySgt Paul	2020-11-03	✓
- ALL	(MCASNR_HEADQUARTERS & HEADQUARTERS SQUADRON_SACO)	<input type="checkbox"/>	Staff Section Records Manager: Weed GySgt Tyler J	2021-10-22	✓
- ALL	(MCASNR_HEADQUARTERS & HEADQUARTERS SQUADRON_FLIGHT OPERATIONS)	<input type="checkbox"/>	Staff Section Records Manager: Goergen LCpl Kyle J	2021-10-22	✓
- ALL	MCASNR_CNATT (MCASNR_CNATT)	<input type="checkbox"/>	Primary Unit CDRM: Russ SSgt Porsha D	2021-08-13	
	(MCASNR_CNATT_HEADQUARTERS)				✓
	(MCASNR_CNATT_MV22)				✗
	(MCASNR_CNATT_CH53)				✗

H&HS Squadron and CNATT are subordinate NJDA commands, therefore their file plan designation would NOT appear in the “Has FilePlan” column; expanding their command org structure would display their file plan compliance status, as indicated in the screenshot below.

- To make edits to the section’s file plan, select the unit name in blue.

SubSections List					
+ ALL	Unit	<input type="checkbox"/> ALL	RMs	Appt Letter	Has FilePlan
+ ALL	MCASNR_ADJ (MCASNR_ADJUTANT)	<input type="checkbox"/>	Staff Section Records Manager: Robertson CIV Julie A	2021-02-23	✓

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: <input type="text" value="Electronic"/> Records Location(s): <input type="text" value="MCTILM"/> Exclusion/Additional Comments: <input type="text"/>		
<input checked="" type="checkbox"/> 1000-5	Awards Program	SSIC
Stored Format: <input type="text" value="Electronic"/> Records Location(s): <input type="text" value="MCTILM"/> Exclusion/Additional Comments: <input type="text"/>		
<input checked="" type="checkbox"/> 1000-15	Retirement Case Files	SSIC
Stored Format: <input type="text" value="Electronic"/> Records Location(s): <input type="text" value="MCTILM"/> Exclusion/Additional Comments: <input type="text"/>		
<input checked="" type="checkbox"/> 1000-21	Family Advocacy Case Files - Substantiated and Unsolved	SSIC
Stored Format: <input type="text" value="Electronic"/> Records Location(s): <input type="text" value="MCTILM"/> Exclusion/Additional Comments: <input type="text"/>		

- This action will refresh the homepage screen and update the **“CMD/Section File Plan”** tab on the right-hand panel. Ensure that the selected unit name appears.

5

[+ View All](#)

Schedule #	Title	Itemized by SubOrg
1 <input checked="" type="checkbox"/> 1000-1	Policy, Strategy, and Planning	SSIC
2 <input type="text" value="Electronic"/>	3 <input type="text" value="SharePoint"/>	
4 <input type="text"/>		

- There are several subcomponents to the file plan in addition to selecting the appropriate record schedule:
  1. **Records Schedule:** Select the Records Schedule that is utilized by the subsection.
  2. **Stored Format:** Select the appropriate format of the records associated to the Records Schedule (*Ex. awards records belonging to RS 1000-5 are managed electronically via iAPS > select "Electronic."*)
  3. **Records Location:** Type the appropriate location of the records. You can be as descriptive as needed. (*Ex. Filing Cabinet 1A, DTS, iAPS, SharePoint, Shared Drive, etc.*)
  4. **Exclusion/Additional Comments:** This section allows SSRMS to communicate any logistical or policy limitations that would prohibit their transition to ERM (*Ex. lack of scanners, classified material, or a policy that directly requires the continued use of paper records*). If no such limitation exists and the section identifies paper records in their stored format, an exclusion/comment should be made to provide justification as to why the record is not managed in an electronic format and when that transition will be made.
  5. Select **"Save Changes to File Plan"** to ensure changes are reflected.

## 9.0 Other Features

### 9.1 Edit User

Each user has the ability to edit his/her information and move around CROSS as necessary. *Note: CROSS is an intentionally open site, designed to support program transparency at the organizational and HQMC (i.e., IGMC and ARDB) level.* To adjust your profile information or to change units:



- Select the name in the top right corner of the CROSS page

Edit User

EDIT PAGE

Save Cancel Paste Copy Delete Item Attach File Spelling

Commit Clipboard Actions 1 Spelling

Save Cancel

Name \* Forrester CTR Justin Email \* justin.forrester.ctr@usmc.mil

Role \* Primary Unit CDRM 2 Phone Number \* (540) 210-0119

You have listed the following as your unit: \*  
CROSSTEST2 - CROSSTEST2

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

1. Select “**Attach File**” to upload a hard copy appointment letter from your Commanding Officer *Note: This functionality should only be used in limited circumstances; CDRMs should favor the automated appointment letter generated via CROSS.*
2. **Phone Number:** Update your contact phone number, as necessary.
3. **Click to Change Units:** To move to/view a new unit, select this option

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

Find your unit: \*

914: MCASNR - MARINE CORPS AIR STATION NEW F

**The following are the RMs listed for your organization:**

Primary Unit CDRM - Perkins CIV Megan  
Alternate Unit CDRM - Shannon 1stLt Asia  
Alternate Unit CDRM - Rozek CIV Danny

Version: 1454.0  
Created at 6/3/2021 12:01 PM by  Forrester CTR Justin  
Last modified at 9/18/2021 4:55 PM by  Forrester CTR Justin

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

- 417: HQMC - HEADQUARTERS MARINE CORPS
- 698: IL - INSTALLATIONS AND LOGISTICS
- 740: MCICOM - MARINE CORPS INSTALLATIONS COMMAND
- 741: MCIEAST - MARINE CORPS INSTALLATIONS EAST
- 914: MCASNR - MARINE CORPS AIR STATION NEW RIVER, NC

Save

Cancel

4. Type in your organization's name or CROSS ID (if previously known - this information can also be acquired from your CDRM), select the name from the drop down, and click outside the box.
  - a. You will be able to view the current CDRMs for your unit, along with your organizational hierarchy (i.e., chain of command).
5. Once selected, click **"Save"** to move to your new unit.

If you are no longer the CDRM or SSRM for the organization or if your role has changed, update your status by contacting the ARDB Helpdesk at [smb\\_hqmc\\_rmoutreach@usmc.mil](mailto:smb_hqmc_rmoutreach@usmc.mil) or via the CROSS **"Contacts"** web part (select Tech Help Desk Support).

CDRMs can also move personnel within their organization by selecting their name in blue and following the steps above.

For changes to a user's name, email, or phone number, contact the CROSS Support Help Desk from the "Contacts" link at the top of your CROSS page. They will be able to update this profile information.

## 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 with ARDB's Technical and Help Desk Support, as well as the SSRMs within organization. Emails can be sent to individual or multiple personnel and directly to the ARDB Tech and Help Desk Support inbox.

Ensure that CROSS is accessed from either Google Chrome or Microsoft Edge. Other browsers tend to disrupt the workflow and prevent the message from being sent.

+	MCASNR_H&HS (MCASNR_HEADQUARTERS & HEADQUARTERS SQUADRON)	1	<input checked="" type="checkbox"/> Primary Unit CDRM: Henriquez CIV Jose A
+	MCASNR_CNATT (MCASNR_CNATT)		<input checked="" type="checkbox"/> Primary Unit CDRM: Russ SSgt Porsha D

### Contacts

To ensure message integrity, please use IE or Chrome as your web browser.

You can send an email directly by providing an email body below, and checking the requested recipients:

2 **Tech and Help Desk Support**  Selected RMs

3

4

#### To Contact SSRMs:

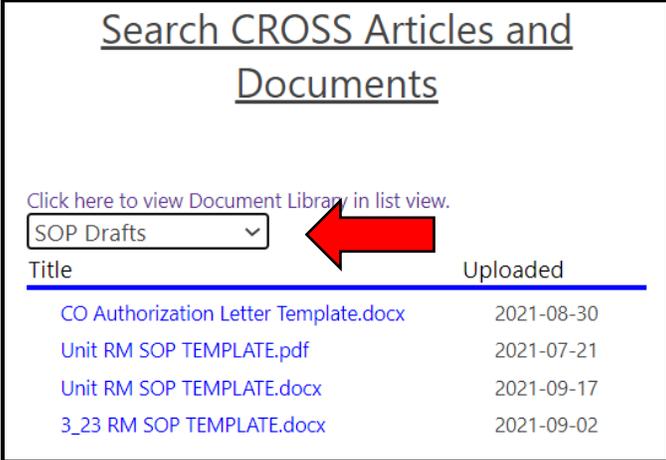
1. Select the RMs that you would like to contact
2. Select the box next to "Selected RMs"
3. Type your message
4. Click "Send Email" to send the message.

### Contact the Tech and Help Desk Support:

2. Select the box next to “Tech and Help Desk Support”
3. Type your message
4. Click “Send Email” to send the message

## 9.3 Search CROSS Articles and Documents

As this site continues to develop, content is periodically added to allow users to readily access RM information. The “Search Cross Articles and Documents” feature enables users to view documents, trainings, and templates through a drop-down menu. It also displays available search categories rather than relying on the user to type in specific keywords.



Title	Uploaded
<a href="#">CO Authorization Letter Template.docx</a>	2021-08-30
<a href="#">Unit RM SOP TEMPLATE.pdf</a>	2021-07-21
<a href="#">Unit RM SOP TEMPLATE.docx</a>	2021-09-17
<a href="#">3_23 RM SOP TEMPLATE.docx</a>	2021-09-02

## 9.4 CROSS Ribbon Features

### 9.4.1 Frequently Asked Questions

The ribbon at the top of the homepage provides users access to support features, including most Frequently Asked Questions. These questions are updated periodically. Prior to contacting the Tech and Help Desk Support, visit the FAQ page to verify if your question has been previously answered.



## 9.4.2 E-Training

ARDB is continually working to add and update training curriculum to meet the needs of the Marine Corps. RM training can be accessed under the “**E-Training**” tab of CROSS. Here, users will find the Training & Registration Portal (TRP), a custom application that allows RMs to sign up for/register to various RM courses.



## 9.4.3 RM Policy Matrix

Instead of scouring the internet or searching through the MCPEL (Marine Corps Publications Electronic Library), CROSS provides users with a hyperlinked matrix of all RM policies in a centralized location. These documents can be conveniently viewed under the “**Policy**” tab.



Records Management Policy Matrix  
Last updated 8/23/2020

<a href="#">MARADMIN 192/19</a>	Guidance Regarding Out-Processing, Account Management, and Records Requirements for MCEN Users
<a href="#">5210 MCBUL</a>	Marine Corps Transition to Electronic Records Management (ERM)
<a href="#">44 USC Chapter 21</a>	National Archives and Records Administration
<a href="#">44 USC Chapter 29</a>	Records Management by the Archivist of the United States and by the Administrator of General Services
<a href="#">44 USC Chapter 31</a>	Records Management by Federal Agencies
<a href="#">44 USC Chapter 33</a>	Disposal of Records
<a href="#">OMG M-19-21</a>	Transition to Electronic Records
<a href="#">MCO 5210.11F</a>	Marine Corps Records Management Program
<a href="#">SECNAVINST 5210.8F</a>	Department of the Navy Records Management Program

## 9.4.4 RM Program Support Contact List

Contact information for ARDB government and contract staff can be found in the “**Contacts**” tab in CROSS.

## 9.4.5 CROSS Updates

As the RM program evolves, so too does the functionality within CROSS. In an attempt to provide the best possible programmatic support, CROSS is in a continual state of development, which can often be disruptive to users. In order to mitigate confusion, ARDB publishes a series of release notes with each major improvement cycle in order to keep users informed. Click the “**New**” tab to view all functional and graphical user interface updates.



ReleaseNotes

✓	Title	Notes
V1.12	...	<p><b>The Training and Registration Portal</b> – Featured under the “E-Training” tab. This is the new registration application for all CROSS and future RM training, designed to support data collection and user metrics for ARDB. Available for all CROSS users and prospective Records Managers. MCEITS account required to access. Refer to the “<b>TRP User Guide</b>” under “<b>Search CROSS Articles &amp; Documents &gt; Training.</b>”</p> <p>-----</p> <p><b>For Commands (NJDA) Only</b></p> <p>-Subordinate commands are once again available for selection within the main dashboard (i.e., clickable)</p> <p>-<b>CMD/Section File Plan.</b> Upon initial page load, the command file plan now shows all selected record schedules (RS) in “collapsed mode.” To view which sections have selected each RS, select “+ Expand All” or select “+” to individually expand one RS at a time.</p> <p>-----</p> <p><b>For Non Commands (Non-NJDAs) Only</b></p> <p>-<b>File Plan Designation.</b> Applicable to non-commands (non-NJDAs) only. The “File Plan Create: Yes/No” indicator has been removed and replaced by the visual icon under a “Has File Plan” column. A red “x” indicates that no file plan exists; a green checkmark indicates that a file plan has been created, but does not guarantee completeness. Note: This feature does NOT apply to command (NJDA) entities as commands themselves do not produce records (i.e., rather, the subsections produce records <i>on behalf of</i> the command).</p> <p>-<b>CMD/Section File Plan.</b> The record schedule (RS) information now expands upon selection (i.e., clicking the checkbox), rather than initial page load. Be sure to save all changes to the file plan prior to selecting “- Hide Unchecked.”</p> <p>-<b>Organizational Info Tab.</b> The “Training” and “Miscellaneous” sections have been added to the Org Info tab for staff section use. Note: documents uploaded in either of these sections do not “roll up” to the command level.</p>