



DEPARTMENT OF THE NAVY
HEADQUARTERS UNITED STATES MARINE CORPS
3000 MARINE CORPS PENTAGON
WASHINGTON DC 20350-3000

Canc: Jan 2024

MCBul 5210 W/ ADMIN CH
AR (ARDB)
19 Jan 2023

MARINE CORPS BULLETIN 5210 W/ ADMIN CH

From: Commandant of the Marine Corps
To: Distribution List

Subj: UPDATE TO THE MARINE CORPS ELECTRONIC RECORDS MANAGEMENT
MIGRATION PLAN

Ref: (a) OMB M-23-07, "Update to Transition to Electronic Records,"
December 23, 2022
(b) OMB Government Reform Plan, "Delivering Government
Solutions in the 21st Century, Reform Plan and
Reorganization Recommendations," 2018
(c) 5 U.S.C. 552a
(d) SECNAVINST 5211.5F
(e) SECNAVINST 5210.8F
(f) SECNAV M-5210.1
(g) MCO 5210.11F

1. Situation. National Archives and Records Administration (NARA) published reference (a) above; this reference supersedes the reference (a) cited within the originally published Bulletin. This Bulletin's reference (a) adjusts the timeline of requirements to move Federal agencies to a fully electronic environment.

2. Mission. To provide administrative updates and extend the expiration date of this Bulletin.

3. Execution. To comply with Federal records management mandates and continue implementation of the Marine Corps' transition to electronic records as published per the references.

4. Administration and Logistics

a. Headquarters Marine Corps, Records, Reports, Directives and Forms Management Section (HQMC ARDB) Organizational Mailboxes. The following mailboxes may be used to contact HQMC (ARDB) to:

- (1) Submit required information and/or forms as stated above.
- (2) Submit questions regarding this Bulletin.

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(3) Hyperlinked Mailboxes: HQMCREC-MGR@usmc.mil please "cc" [SMB HQMC RMOUTREACH@usmc.mil](mailto:SMB_HQMC_RMOUTREACH@usmc.mil) on all submissions.

b. Privacy Act. Any misuse or unauthorized disclosure of Personal Identifiable Information (PII) may result in both civil and criminal penalties. The Department of the Navy (DON) recognizes that the privacy of an individual is a personal and fundamental right that shall be respected and protected. The DON's need to collect, use, maintain, or disseminate PII about individuals for purposes of discharging its statutory responsibilities shall be balanced against the individuals' right to be protected against unwarranted invasion of privacy. All collection, use, maintenance, or dissemination of PII shall be in accordance with the Privacy Act of 1974, as amended (reference (c)) and implemented per reference (d).

c. Records Management. In accordance with references (e) and (g), records created as a result of this Bulletin shall be managed according to NARA-approved dispositions cited by reference (f) to ensure proper maintenance, use, accessibility and preservation, regardless of format or medium. Records disposition schedules are located on the Department of the Navy/Assistant for Administration (DON/AA), Directives and Records Management Division (DRMD) portal page at:

<https://portal.secnav.navy.mil/orgs/DUSNM/DONAA/DRM/Records-and-Information-Management/Approved%20Record%20Schedules/Forms/AllItems.aspx>.

Refer to reference (g) for Marine Corps records management policy and procedures.

5. Command and Signal

a. Command. This Bulletin is applicable to the Marine Corps Total Force.

b. Signal. This Bulletin is effective the date signed and expires one year from date of signature.

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A. N. SULLIVAN
By Direction

PCN: 10255302101



DEPARTMENT OF THE NAVY
HEADQUARTERS UNITED STATES MARINE CORPS
3000 MARINE CORPS PENTAGON
WASHINGTON DC 20350-3000

MCBul 5210
AR (ARDB)
23 Jun 2022

MARINE CORPS BULLETIN 5210

From: Commandant of the Marine Corps
To: Distribution List

Subj: UPDATE TO THE MARINE CORPS ELECTRONIC RECORDS MANAGEMENT
MIGRATION PLAN

Ref: ~~(a) OMB M-19-21, "Transition to Electronic Records,"
June 28, 2019~~
(a) OMB M-23-07, "Update to Transition to Electronic Records,"
December 23, 2022
(b) OMB Government Reform Plan, "Delivering Government
Solutions in the 21st Century, Reform Plan and
Reorganization Recommendations," 2018
(c) SECNAVINST 5210.8F
(d) MCO 5210.11F

1. Situation. The Federal government recognizes the need to improve agencies' efficiency, effectiveness, and responsiveness to citizens by converting paper-based processes to electronic workflows, expanding online services, and enhancing management of government records, data, and information. Beginning ~~31 December 2022~~ 30 June 2024, the National Archives and Records Administration (NARA) and Federal Records Centers (FRCs) will no longer accept paper records, per reference (a). The Department of the Navy (DON) and subsequently the Marine Corps, will transition to electronic records management (ERM) to comply with references (a) and (b). This Bulletin outlines a series of policy and programmatic changes to the Marine Corps Records Management (RM) Program in support of achieving a fully ERM-compliant Marine Corps.

2. Cancellation. MCBul 5210 dtd 5 Mar 2021.

3. Mission. The Marine Corps shall continue progress towards becoming ERM compliant and adhere to references (a) and (b).

4. Execution

a. Commander's Intent and Concept of Operations

(1) Commander's Intent. It is recognized that Marine Corps organizations are in varying states of compliance. However, all

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organizations shall complete the implementation of the Command Records Operational Support Site (CROSS), and implement all other RM program updates described herein. All commanders, commanding officers, directors, and civilian command-equivalent agency heads of Headquarters Marine Corps (HQMC) and supporting activities, Fleet Marine Forces, and the supporting establishment are ultimately responsible for their organizations' administrative readiness, posture, and compliance.

(2) Concept of Operations

(a) Phases of Transitioning to Electronic Records Management (ERM). The below three-phased approach was previously published in MCBul 5210 dtd 5 Mar 2021 to achieve ERM compliance across the Marine Corps enterprise. Due to extenuating circumstances, **Phase 2: Marine Corps Tool for Information Lifecycle Management (MCTILM) Deployments, has been discontinued.** Commands that are currently managing records in MCTILM will continue to do so and will be given a migration plan pending the official announcement of a Phase 3 long-term Marine Corps-wide ERM solution. The updated transition to ERM shall occur in three phases:

1. Phase 1: Implementation of Command Records Operational Support Site (CROSS). CROSS is a SharePoint-based programmatic tool that establishes an organization's RM program, standardizes the construct of RM programs throughout the Marine Corps, and replaces the need for organizations to develop RM turnover binders. Completion of Phase 1 is required before implementation of Phase 2. Registration, training, and end-user guides are available on the Administration and Resource Management Division (AR), Publishing and Logistics Management Branch (ARD), Records, Reports, Directives and Forms Management Section (ARDB) website (listed in paragraph 5 of this Bulletin). Once an organization has established a complete program in CROSS, contact HQMC (ARDB) at the contact email addresses listed in paragraph 5 of this Bulletin.

2. Phase 2: SharePoint Online (SPO). MCTILM has been discontinued; in the absence of MCTILM, commands are encouraged to implement proactive ERM measures, such as utilizing SharePoint to store records. Commands are required to apply appropriate protections and measures to protect records containing Personally Identifiable Information (PII) and review access controls immediately following routine or any other maintenance. SharePoint records storage user guides have been created to assist Command Designated Records Managers (CDRMs) in creating records storage capabilities in SharePoint, until the Phase 3 future ERM solution is implemented. User guides will be sent to commands upon completing Phase 1, CROSS implementation.

NOTE: Records already residing in an approved system of record shall remain resident in their respective system(s). Records containing Controlled Unclassified Information (CUI) shall also remain resident in their respective system(s) of record.

3. Phase 3: Implementation of the DON/Marine Corps Future ERM Solution. The long-term solution is to be determined, additional guidance forthcoming.

(b) Paper Waiver Requests

1. There may be requirements where management of paper records is required and whereas an electronic record of such is not possible due to specific requirements such as litigation, freezes, etc. In the event there is such a requirement to maintain paper records, a NAVMC Form 10030/1, "Records Management Paper Waiver Request," shall be submitted to HQMC (ARDB) for review and proposal to NARA for consideration.

2. Justification for paper waiver requests must include associated policy to include specific order number(s), chapter(s) and paragraph(s) stating the requirement to retain records in paper format. All other requests for waivers must provide comment or explanation.

3. If the request is denied, the form will include a summary detailing the reason for denial. If the request is approved, the form will provide date parameters for the requesting unit to transition to ERM processes.

4. Copies of all waivers, whether approved or denied, shall be archived via the requesting unit's CROSS.

(c) CAPSTONE Program. A Marine Corps CAPSTONE official is a senior official occupying a particular billet of great influence within the Marine Corps whose Non-Secure Internet Protocol Router (NIPR) and Secure Internet Protocol Router (SIPR) emails must be identified, captured, and transferred to NARA for permanent retention in accordance with General Records Schedule (GRS) 6.1. The billet roster of all CAPSTONE officials is captured on the NA-1005 Form, "Verification for Implementing GRS 6.1." This form is maintained by NARA and audited by HQMC both quarterly and ad hoc to ensure its accuracy. Auditing procedures include contacting the commands with an identified CAPSTONE official and requesting the CAPSTONE official's information. The NA-1005 billet roster of Marine Corps CAPSTONE officials was recently updated and published. Commands to which the identified CAPSTONE official billets belong are required to update their command CROSS accounts to reflect the names of the individuals currently filling the billets. The billet roster is available on the IGMC 5210 Checklist, subsection 4.

(d) NAVMC 10030, "Commander's Record Management Acknowledgement Agreement." This form shall be completed and signed by commanders at the O-5 level and above within 30 days of assuming command.

(e) NAVMC 11786, "Records Management Checklist for

Departing USMC Employees." This form was updated and shall be integrated into unit check-out procedures.

b. Subordinate Element Missions

(1) Commanders and Leaders at All Levels

(a) Provide top-down oversight to ensure all subordinate organizations are actively transitioning to ERM and moving toward Phase 1 Compliance with CROSS and all other updates within this Bulletin.

(b) Assess the readiness posture of the command/organization as it pertains to ERM. Ensure all necessary steps are taken to transition records from paper to electronic record keeping.

(c) Appoint a CDRM in the rank of E-6 or higher (or civilian equivalent).

NOTE: A Marine does not have to have a Military Occupational Specialty (MOS) of 0111 or 0102 to be a CDRM.

(d) Oversee the command/organization's transition to ERM in accordance with the phases and timelines as outlined in this Bulletin.

(e) Commands with a billet identified on the NA-1005 Form are required to submit a TMT task to HQMC (ARDB) at "USMC HQMC AR ARD ARDB RECORDS" with the following information:

1. CAPSTONE official rank, name, billet title,
2. NIPR email address,
3. SIPR email address, and
4. Estimated date of rotation.

(f) All commanders in the grade of O-5 and higher, must complete and sign the NAVMC 10030 form within 30 days of assuming command. Commanders who have already assumed command are required to complete and sign the NAVMC 10030 within 30 days of publication of this Bulletin.

(2) Command Designated Records Managers (CDRMs)

(a) Provide oversight and guidance to all sections within the organization related to the ERM migration (not just the G-1/S-1).

(b) Oversee and implement the command's/organization's transition to ERM in accordance with the phases and timelines as

outlined in this Bulletin.

(c) Submit NAVMC 10030/1 to HQMC (ARDB) to request waivers for the continued use and maintenance of specific paper records, if applicable. CDRMs are responsible for the retention and disposition of the NAVMC 10030/1, regardless of approval or disapproval status.

(d) Upload the NAVMC 10030 form, with the commander's signature, into the command's CROSS page, within the miscellaneous folder.

(3) Manpower and Reserve Affairs (M&RA), Senior Leader Management Branch (MMSL). To eliminate redundant efforts, on a quarterly basis, provide HQMC (ARDB) with a current list of all general officers' and senior executives' email accounts as they are applicable with the Department of the Navy, United States Marine Corps (Record Group 0127). NA-1005s provide updates/inclusions of required CAPSTONE email addresses that are identified for permanent retention.

(4) Headquarters Marine Corps, Records, Reports, Directives and Forms Management Section (HQMC ARDB)

(a) Consolidate and provide response to all NAVMC 10030/1 waiver requests.

(b) Retain a list of all approved NAVMC 10030/1 waivers. This list will be audited annually to evaluate updates and extend or rescind waiver statuses.

(c) Maintain CAPSTONE Official List; retrieve updates from M&RA and submit to DON quarterly. Update NARA as applicable.

(d) Validate commands have achieved full CROSS compliance and provide instructions for completing Phase 2.

5. Administration and Logistics

a. Headquarters Marine Corps, Records, Reports, Directives and Forms Management Section (HQMC ARDB) Organizational Mailboxes. The following mailboxes may be used to contact HQMC (ARDB) to:

(1) Submit required information and/or forms as stated above.

(2) Submit questions regarding this Bulletin.

(3) Hyperlinked Mailboxes: HQMCREC-MGR@usmc.mil please "cc" [SMB HQMC RMOUTREACH@usmc.mil](mailto:SMB_HQMC_RMOUTREACH@usmc.mil) on all submissions.

b. Applicable Websites (hyperlinked)

(1) [Command Records Operational Support Site \(CROSS\)](#).

(2) [DON Record Schedules](#).

(3) [HQMC \(ARDB\) Website](#).

c. Forms Management

(1) The forms referenced within this Bulletin are available at [Navy Forms Online \(NFOL\)](#):

(a) NAVMC 10030/1, "Records Management Paper Waiver Request."

(b) NAVMC 10030, "Commander's Record Management Acknowledgement Agreement."

(c) NAVMC 11786, "Records Management Checklist for Departing USMC Employees."

(2) Functional Area Checklist (FAC) 5210 is located at [IGMC, Inspections Division, Functional Area Checklists](#).

(3) Department of the Navy, United States Marine Corps (Record Group 0127) NA-1005, "Verification for Implementing GRS 6.1," is located at [National Archives, Federal Records Management, Records Control Schedules \(RCS\), CAPSTONE Forms](#).

d. Privacy Act. Any misuse or unauthorized disclosure of PII may result in both civil and criminal penalties. The DON recognizes that the privacy of an individual is a personal and fundamental right that shall be respected and protected. The DON's need to collect, use, maintain, or disseminate PII about individuals for purposes of discharging its statutory responsibilities shall be balanced against the individuals' right to be protected against unwarranted invasion of privacy. All collection, use, maintenance, or dissemination of PII shall be in accordance with the Privacy Act of 1974, as amended (5 U.S.C. 552a) and implemented per SECNAVINST 5211.5F.

e. Records Management. In accordance with references ~~(a)~~ (c) and ~~(b)~~ (d), records created as a result of this directive shall be managed according to NARA-approved dispositions per SECNAV M-5210.1 to ensure proper maintenance, use, accessibility and preservation, regardless of format or medium. Records disposition schedules are located on the Department of the Navy/Assistant for Administration (DON/AA), Directives and Records Management Division (DRMD) portal page at:

<https://portal.secnav.navy.mil/orgs/DUSNM/DONAA/DRM/Records-and-Information-Management/Approved%20Record%20Schedules/Forms/AllItems.aspx>.

Refer to MCO 5210.11F for Marine Corps records management policy and procedures.

6. Command and Signal

a. Command. This Bulletin is applicable to the Marine Corps Total Force.

b. Signal. This Bulletin is effective the date signed.



G. P. OLSON
Director, Marine Corps Staff

PCN: 10255302100