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

Canc: Feb 2025

MCBul 5210
AR (ARDB)
12 Feb 2024

MARINE CORPS BULLETIN 5210

From: Commandant of the Marine Corps
To: Distribution List

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

Ref: (a) OMB M-23-07, "Update to Transition to Electronic
           Records," December 23, 2022
       (b) OMB Government Reform and Reorganization Plan,
           "Delivering Government Solutions in the 21st
           Century," 2018
       (c) SECNAVINST 5210.8F
       (d) SECNAV M-5210.1 w/CH-1
       (e) MCO 5210.11F
       (f) 5 U.S.C. § 552a
       (g) SECNAVINST 5211.5F
       (h) MCO 5215.1K w/Admin CH-1
       (i) DoD CIO Memorandum, "Use of Text Messaging on Mobile
           Devices and Records Management of Electronic
           Records," September 27, 2023
       (j) NARA Bulletin 2022-02, "Resubmission of Capstone
           Forms," April 19, 2022
       (k) DoDI 5015.02 w/CH-1, "DoD Records Management
           Program," August 17, 2017

1. <u>Situation</u>. 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 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 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. This Bulletin is in accordance with references (a) through (h).

2. <u>Cancellation</u>. MCBul 5210 w/Admin CH-1 dtd 19 Jan 2023.

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

4. <u>Execution</u>

   a. <u>Commander's Intent and Concept of Operations</u>

      (1) <u>Commander's Intent</u>. Marine Corps organizations are in varying states of RM compliance. To streamline RM processes and procedures, organizations shall complete the implementation of the Command Records Operational Support Site (CROSS) and 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 responsible for their organizations' administrative readiness, posture, and compliance.

      (2) <u>Concept of Operations</u>

         (a) <u>Phases of Transitioning to Electronic Records Management (ERM)</u>. The three-phased approach outlined below 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. <u>Phase 1: Implementation of Command Records Operational Support Site (CROSS)</u>. CROSS is a SharePoint-based programmatic tool that facilitates the governance of 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 (ARDIV); Publishing and Logistics Management Branch (ARD); Records, Reports, Directives, and Forms Management Section (ARDB) Website https://usmc.sharepoint-mil.us/sites/AR_RecordsMangement. Once an organization has built a complete program in CROSS, contact HQMC ARDB Records' Outreach Mailbox at smb_hqmc_rmoutreach@usmc.mil.

       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 protections and measures to protect records containing Personally Identifiable Information (PII) or other Controlled Unclassified Information (CUI) and, if maintained in SharePoint, to 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. Upon completion of Phase 1, users can access guides on the 'CROSS Articles and Documents' section of the command's CROSS landing page.

NOTE: Records already residing in an approved system of records shall remain resident in their respective system(s).

       3. Phase 3: Implementation of the Department of the Navy (DON) / Marine Corps Future Electronic Records Management (ERM) Solution. The long-term solution is to be determined, additional guidance forthcoming.

     (b) Paper Waiver Requests

       1. There may be circumstances where management of paper records is required and 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 10030/1, "Records Management Paper Waiver Request," must be submitted to the HQMC ARDB Records Outreach Mailbox at smb_hqmc_rmoutreach@usmc.mil for review and may be subject to NARA for approval.

       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.

    <u>3</u>. 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.

    <u>4</u>. Copies of all waivers, whether approved or denied, shall be maintained on the requesting unit's CROSS page.

   (c) <u>Capstone Program</u>. A Marine Corps Capstone official is responsible for agency, program policy and mission-related actions requiring permanent retention using Non-Secure Internet Protocol Router (NIPR) and Secure Internet Protocol Router (SIPR) emails must be identified, captured, and transferred to NARA 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 HQMC ARDB Records and approved by NARA. Agencies are required to resubmit the NA-1005 Form every four years in accordance with reference (j). HQMC ARDB Records audits the named officials in the billets listed on the NA-1005 Form 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.

   (d) <u>NAVMC 10030, "Commander's Record Management Acknowledgement Agreement</u>." Commanders must acknowledge their understanding and responsibility to the Marine Corps Records Management Program and the enterprise-wide transition to ERM. All commanders in the grade of O-5 and higher, must complete and sign the Commander's Records Management Acknowledgement Agreement Form (NAVMC 10030) within 30 days of assuming command. Upon completion, commanders will ensure the record is appropriately stored in the command's electronic records repository with a copy uploaded to the command's CROSS page.

   (e) <u>NAVMC 11786, "Records Management Checklist for Departing USMC Employees</u>." This form was updated and shall be integrated into unit check-out procedures.

(f) <u>Mobile Devices and Text Messaging Records</u>. When conducting government business, users of government-owned mobile devices must use the Microsoft (MS) Teams Chat as the official messaging application for all Department of Defense (DoD) personnel, per reference (i).

<u>1</u>. MS Teams is available on desktop, laptop, and properly configured Government Furnished Equipment (GFE) Mobile Computing (Android/iOS) devices.

<u>2</u>. Neither personal nor GFE text messaging applications are authorized for the retention or transmission of Marine Corps records.

<u>3</u>. If MS Teams is not accessible for business communications, individuals are directed to connect via official United States (U.S.) Government email accounts.

<u>4</u>. If records, as defined by reference (k), are inadvertently created on a personal mobile device, users are required to capture screenshots of the content and promptly forward as an attachment to their official government email account with Subject Line: "Official Record of Text Messages". This action will create a record and is retained by the email exchange account.

<u>5</u>. Examples of official messaging records:

<u>a</u>. Any contact with a media outlet by any member of the United States Marine Corps (USMC) acting in an official capacity.

<u>b</u>. Any business contact with a business on behalf of the U.S. Government.

<u>c</u>. Any contact between a member of the U.S. Government and a foreign official or military member.

<u>d</u>. Any interagency coordination between members of the U.S. Government.

<u>6</u>. Examples of non-official messaging records:

<u>a</u>. Personal contact between family, friends, and coworkers unrelated to official government business.

b. Contact with foreign officials or members of the military for personal reasons.

c. Basic non-operational coordination communications, such as standard daily accountability or morning meeting locations.

d. Personal medical, legal, therapeutic, religious, or other such protected communication between an individual and their provider, attorney, victim advocate, clergy, or therapist.

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 an Enterprise Task Management Software Solution (ETMS2) task to HQMC ARDB Records 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 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) <u>Command Designated Records Managers (CDRMs)</u>

(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 outlined in this Bulletin.

(c) Submit NAVMC 10030/1 to HQMC ARDB Records 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, with the commander's signature, into the command's CROSS page, within the miscellaneous folder.

(3) <u>Manpower and Reserve Affairs (M&RA), Senior Leader Management Branch (MMSL)</u>. To eliminate redundant efforts, on a quarterly basis, provide HQMC ARDB Records 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-1005. Quarterly updates provide inclusions of required Capstone email addresses that are identified for permanent retention.

(4) <u>Headquarters, Marine Corps (HQMC); Records, Reports, Directives, and Forms Management Section (ARDB); Records Management Program</u>

(a) Consolidate and provide responses 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 commands and submit to Marine Corps Cyberspace Operations Group (MCCOG) quarterly.

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

5. <u>Administration and Logistics</u>

a. <u>Records Management</u>. Records created as a result of this Bulletin shall be managed according to NARA-approved dispositions in reference (d), SECNAV M-5210.1 w/CH-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 reference (e), MCO 5210.11F, for Marine Corps records management policy and procedures.

b. <u>Privacy Act</u>. 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 [reference (f)] and implemented per reference (g).

c. <u>Forms Management</u>

(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 Form, "Verification for Implementing GRS 6.1," is located at [National Archives, Federal Records Management, Records Control Schedules (RCS), CAPSTONE Forms](#).

   d. <u>Headquarters, Marine Corps (HQMC); Records, Reports, Directives, and Forms Management Section (ARDB); Records Management Program Organizational Mailboxes</u>. The following mailboxes may be used to contact HQMC ARDB Records to:

      (1) Submit questions regarding this Bulletin.

      (2) Hyperlinked Mailboxes: HQMCREC-MGR@usmc.mil please "cc" SMB HQMC RMOUTREACH@usmc.mil on all submissions.

   e. <u>Applicable Websites (Hyperlinked)</u>

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

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

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

   f. <u>Cancellation Contingency</u>. This Bulletin is cancelled one year from the date of publication or when incorporated into reference (e), whichever occurs first.

6. <u>Command and Signal</u>

   a. <u>Command</u>. This Bulletin is applicable to the Marine Corps Total Force.

   b. <u>Signal</u>. This Bulletin is effective the date signed.

G. P. OLSON
Director, Marine Corps Staff

DISTRIBUTION: PCN 10255307200

APPENDIX A

Glossary of Acronyms and Abbreviations

ARD	Publishing and Logistics Management Branch
ARDB	Records, Reports, Directives, and Forms Management Section
ARDIV	Administration and Resource Management Division
CDRM	Command Designated Records Manager
CROSS	Command Records Operational Support Site
CUI	Controlled Unclassified Information
DoD	Department of Defense
DON	Department of the Navy
DON/AA	Department of the Navy/Assistant for Administration
DRMD	Directives and Records Management Division
ERM	Electronic Records Management
ETMS2	Enterprise Task Management Software Solution
FAC	Functional Area Checklist
FRC	Federal Records Center
GFE	Government Furnished Equipment
GRS	General Records Schedule
HQMC	Headquarters, Marine Corps
IGMC	Inspector General of the Marine Corps
M&RA	Manpower and Reserve Affairs
MCCOG	Marine Corps Cyberspace Operations Group
MCTILM	Marine Corps Tool for Information Lifecycle Management
MMSL	Senior Leader Management Branch
MOS	Military Occupational Specialty
MS	Microsoft
NARA	National Archives and Records Administration
NAVMC	Navy Marine Corps
NFOL	Navy Forms Online
NIPR	Non-Secure Internet Protocol Router
PII	Personally Identifiable Information
RCS	Records Control Schedule
RM	Records Management
SIPR	Secure Internet Protocol Router
SPO	SharePoint Online
U.S.	United States
USMC	United States Marine Corps