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

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MARINE CORPS BULLETIN 5210

From: Commandant of the Marine Corps
To: Distribution List

Subj: ANNOUNCEMENT OF UPCOMING CHANGES TO THE MARINE CORPS RECORDS
      MANAGEMENT PROGRAM DIRECTIVE

Ref: See enclosure (1)

Encl: (1) References

Reports Required: I. DMCS Monthly Status Report, pg. 6, par.3b(4)(a)

1. <u>Situation</u>

   a. By all accounts, the Federal mandate to instill a paperless
environment throughout the Marine Corps has been achieved, putting Electronic
Records Management (ERM) within reach of the standards set by references (a)
and (b).

       (1) In early 2021, the Marine Corps instituted a Three-Phased
Approach to ERM Compliance, rolling out a series of web-based tools
specifically designed to help Command Designated Records Managers (CDRMs)
create and grow organizational Records Management Programs across the Marine
Corps. Today, there are thousands of active CDRMs throughout the Marine
Corps, 90 percent of whom have taken the first step toward ERM by registering
in the Command Records Operational Support Site (CROSS) and by creating a
paperless workplace.

       (2) Yet, to progress toward true ERM, 100 percent of Marine Corps
organizations must migrate their records to SharePoint Online, or risk losing
all data upon the decommissioning of Marine Corps shared drives per reference
(c). According to the Program Executive Office Digital and Enterprise
Services (PEO Digital), to date, 27 percent of Marine Corps Enterprise
Network (MCEN) shared drive content has been migrated to SharePoint Online.
A few larger Marine Corps commands have not yet begun the migration, and
<u>several organizations are losing shared drive access through August 2025</u>.
Currently, shared drives on Marine Corps Base Quantico and Camp Lejeune are
in 'Read Only' statuses.

       (3) To ease this transition, a full, one-on-one assistance team is
available to facilitate the migration. See reference (c) and paragraphs
3b(1)(a)<u>2</u> (Note 3) and 3b(2)(b) of this Bulletin for notes and details.

b. To strengthen the Marine Corps' commitment to records management, the Headquarters Marine Corps (HQMC) Administration and Resource Management Division (AR), Publishing and Logistics Management Branch (ARD), announces that the Records Management Program Directive, reference (d), is in its final stages of a significant update. Impactful changes and a renewed effort to galvanize steps toward ERM compliance make it necessary for the Records Management Program (ARD Records) to publish this Bulletin while updates to reference (d) go through staffing. Some of the updates include:

        (1) Securing the capture of Capstone SIPR email accounts. See paragraph 3b(1)(b) of this Bulletin for details on how to ensure organizational Capstone official emails are identified and auto captured per references (e), (f), and (g).

        (2) A renewed commitment to safeguard Controlled Unclassified Information (CUI) pursuant to and consistent with reference (h) and other Government-wide policies. See paragraph 3b(1)(c) of this Bulletin.

        (3) Maintain a "never trust, always verify" mindset to effectively align with Department of Defense's (DoD's) Zero Trust Strategy per reference (i). See paragraph 3b(1)(d) of this Bulletin.

        (4) Continued notice to conduct government business on government-owned devices, and to use Microsoft Teams Chat as the official messaging application per reference (j). See paragraph 3b(1)(e) of this Bulletin.

        (5) Reset the Command Chronology initiative within Marine Corps organizations per reference (k) as modified by reference (l). See paragraph 3b(1)(f) of this Bulletin.

c. This Bulletin is in accordance with references (a) through (s).

2. <u>Mission</u>. To reach the goal of completing phases one and two of the Three-Phased Approach to ERM Compliance, to stimulate momentum of high-visibility programs as cited above and prepare for implementation of phase three.

3. <u>Execution</u>

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

        (1) <u>Commander's Intent</u>. The Marine Corps is well into phases one and two of its Three-Phased Approach to ERM Compliance: Phase I, Implementation of CROSS and Phase II, migration of Marine Corps records to SharePoint Online, are being implemented. Phase III, the transition of SharePoint Online records to the final records management solution, is currently under construction. Per references (m), (n), (o), and (p), the Marine Corps is required to manage Federal records in a manner consistent with standards set forth by Congress.

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

            (a) <u>Transitioning to Electronic Records Management (ERM)</u>. The Three-Phased Approach to ERM Compliance has been in effect since 2021. Beginning the process is simple: Every Marine Corps organization must identify a CDRM and be registered within CROSS at: https://play.apps.appsplatform.us/play/e/default-f4c44cda-18c6-46b0-80f2-

e290072444fd/a/5046df58-51a7-424b-a6b1-93123e025052?tenantId=f4c44cda-18c6-46b0-80f2-e290072444fd&sourcetime=1734726874700&hidenavbar=true or the hyperlink at: https://usmc.sharepoint-mil.us.mcas-gov.us/sites/USMC_CROSS/SitePages/CROSS_Redesign.aspx. These two actions create the foundation for a Records Management Program and are the keys to attaining a compliant ERM. If the first link above does not open, please use the second link, scroll to the large blue '*CROSS Application (Click Here)*' tile, and enter the newly updated CROSS website.

        (b) Every Marine Corps organization must begin the process of migrating shared drive records to SharePoint Online. MARADMIN 331/24 (reference (c)) provides guidance for networked shared drive migration. Resources are abundant and available to assist in every step of the migration process. Download reference (q), the '*Getting Started*' guide at: https://usmc.sharepoint-mil.us/sites/SPO_MCC/SitePages/Shared-Drive-Repository-(SDR)-Getting-Started-Guide.aspx.

   b. Subordinate Element Missions

      (1) Commanders and Civilian Leaders

        (a) Provide oversight and endorsement of the Marine Corps Records Management Program.

NOTE 1: Organizational leaders must complete and sign the NAVMC 10030, '*Commander's Records Management Acknowledgement Agreement*,' within 90 days of assuming command, or within 90 days of publication of this Bulletin if already in command. Provide the completed form to the CDRM to be uploaded onto CROSS.

         1. Appoint a CDRM in the rank of E-6/GS-9 or higher.

NOTE 2: A Marine does not need to have a Military Occupational Specialty (MOS) of 0111 or 0102 to be a CDRM.

         2. Ensure the command's/organization's transition to ERM. Assess the readiness posture of the command/organization as it relates to ERM. Ensure all necessary steps are taken to transition records from shared drives to SharePoint Online.

NOTE 3: It may be necessary to appoint a Site Collection Administrator to provide technical/instructional assistance and to serve as liaison between the CDRM and the Program Executive Office (PEO) Digital Workplace Services (DWS) Team. Reference (q) is a web-based series of guides to assist in getting started, located at: https://usmc.sharepoint-mil.us/sites/SPO_MCC/SitePages/Shared-Drive-Repository-(SDR)-Getting-Started-Guide.aspx.

         3. Commands/organizations with a billet identified on the Form NA-1005, '*Verification for the Use of General Records Schedule (GRS) 6.1, Email and other Electronic Messages Managed Under a Capstone Approach*,' are required to inform ARD Records of any Capstone official changes by submitting an ETMS2 task to 'USMC HQMC AR ARD RECORDS' with the following information:

           a. Capstone official rank, name, billet title.

b. NIPR email address.

c. SIPR email address.

d. Estimated date of rotation.

4. Please ensure accountability of your organization's Capstone official(s) by responding to ARD Records quarterly ETMS2 taskers titled, 'Capstone Officials – Quarterly Update'.

5. Enforce the completion of required Fiscal Year (FY) Records Management training to include military, contract (if contractually required), and civilian personnel. Training can be found at the following links:

a. MarineNet: https://www.marinenet.usmc.mil/MarineNet/Home.aspx Course Title: M01RMT0700 "MC Records Management Course: Every Marine's Responsibility".

b. Waypoints: https://don.csod.com Course Title: "Records Management in the DON: Everyone's Responsibility".

c. CROSS: https://usmc.sharepoint-mil.us/sites/USMC_CROSS In the 'Search' block, type, 'USMC RM Everyone's Responsibility Training'.

d. Group training is an option for commands and organizations with limited computer assets. Contact ARD Records via SMB_HQMC_RMOUTREACH@usmc.mil to determine the best course of action for your group.

(b) Oversee regularly scheduled submission of Form NA-1005 to update Capstone official data per references (e), (f), and (g). This assists organizational CDRMs in their requirement to capture and secure Capstone SIPR and NIPR email.

(c) Enforce the safeguards of CUI throughout the command/ organization. CUI is information that requires safeguarding or dissemination controls but is not considered classified. The DoD is required to manage and mark records as CUI in five categories outlined in reference (h). Ensure Marine Corps official records are labeled according to their appropriate categories and CUI markings.

(d) In accordance with reference (i), adopt a maximum "never trust, always verify" mindset for records management within the command/organization.

1. In January 2022, DoD established the 'Zero Trust Portfolio Management Office' within the office of the Chief Information Officer. Components were given until October 2022 to adopt and integrate Zero Trust capabilities, technologies, solutions, and processes across their architectures, systems, and within their budget and execution plans.

2. Commands and organizations throughout the Marine Corps must address Zero Trust requirements within their staffing, training, and professional development processes, using the "never trust, always verify"

mindset. This mindset requires Marines to take responsibility for the security of their devices, applications, assets, and services. Users are granted access only to the data they need and when they need it.

(e) Ensure command/organization business is conducted using government-owned mobile devices for text messaging, phone calls, and email communications. DoD Mobile Enterprise System is the authorized platform for government mobile communications. Microsoft Teams Chat is available as a managed application controlled by the MCEN. MCEN has configured Microsoft 365 to manage records created or received by Microsoft Teams Chat in accordance with applicable approved records schedules in reference (p).

1. Records created or received in Microsoft Teams Chat are managed within the application and no additional copy of the record will be required.

2. When mission needs or the effective conduct of Marine Corps business cannot be adequately supported by Microsoft Teams Chat, short message service texting may be used. In such cases, a complete copy of the record must be forwarded to the official Marine Corps electronic messaging account of the user within 20 days of the record's original creation or transmission in accordance with Section 2911 of reference (r). The complete copy of the record includes the content of the message and required metadata, and the record must be retrievable and usable in compliance with reference (n).

NOTE 4: Assigned duties such as recruiting duty or any other position determined necessary and in the interest of the Marine Corps may require controlled electronic messaging services accounts for public communications related to assigned duties. These positions may be exempt from the use of government-owned mobile devices but must still be captured and managed as outlined above.

(f) Focus efforts on the Command Historical Program to ensure command chronology requirements are met. Chapter 5 and Appendix A of reference (k), and reference (l) outline the requirements for each command to maintain a command historical summary file and prepare its command chronologies.

(2) Command Designated Records Managers (CDRMs)

(a) Provide oversight and guidance to all sections within the organization related to the ERM migration. Appoint support personnel within sections, directorates, programs, and other areas that may require special attention in records management.

(b) Support the command's/organization's transition to ERM and upload a copy of current organizational structure to CROSS. Coordinate with the command's/organization's Site Collection Administrator if one is appointed. If one is not appointed, request leadership to identify someone who will provide technical/instructional assistance and serve as the liaison between the CDRM and the PEO DWS Team.

NOTE 5: Reference (q) is a web-based series of guides to assist in getting started with the migration, located at: https://usmc.sharepoint-mil.us/sites/SPO_MCC/SitePages/Shared-Drive-Repository-(SDR)-Getting-Started-Guide.aspx.

(c) Upon receipt of the completed NAVMC 10030, '*Commander's Records Management Acknowledgement Agreement*', upload to CROSS within 90 days of release of this Bulletin. Place the form into the command's/organization's CROSS page (located in the '*Documents*' tab, '*Miscellaneous*' folder).

(d) Ensure Capstone SIPR email accounts are captured by submitting an update to ARD Records upon receipt of the regularly scheduled quarterly ETMS2 tasker. ARD Records will notify CDRMs via email upon each quarterly tasker release.

(e) Monitor unit's annual records management training compliance and upload training roster to CROSS.

(3) <u>Manpower and Reserve Affairs (M&RA) Manpower Management Division (MM), Senior Leader Management Branch (MMSL)</u>. On a quarterly basis, provide ARD Records with an updated list of all general officers and senior executives within the Marine Corps.

(a) This action assists ARD Records to codify the Marine Corps Capstone list as required per reference (f).

(b) Less than half of the Marine Corps Capstone positions are encumbered by general officers and senior executives. Currently, twenty Capstone positions remain to be codified and refined by ARD Records.

(4) <u>Headquarters Marine Corps (HQMC) Administration and Resource Management Division (AR), Publishing and Logistics Management Branch (ARD), Records Management Program</u>. In keeping with the Three-Phased Approach to ERM Compliance, ARD Records will:

(a) Monitor Marine Corps CROSS registrations, CDRM appointments, and the migration of shared drives to SharePoint Online. Provide monthly status reports to the Director, Marine Corps Staff per reference (s).

(b) Collect general officer and senior executive information from the Senior Leader Management Branch (MMSL), retrieve updates from commands/organizations, and codify occupants of all positions within the Marine Corps Capstone community.

(c) Provide quarterly updates of the Capstone list to the Marine Corps Cyberspace Operations Group (MCCOG).

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

a. <u>Records Management</u>. Records created as a result of this Bulletin shall be managed according to National Archives and Records Administration (NARA)-approved dispositions in reference (o), 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: <u>https://portal.secnav.navy.mil/orgs/DUSNM/DONAA/DRM/Records-and-Information-Management/Approved%20Record%20Schedules/Forms/AllItems.aspx</u>. Refer to reference (d), MCO 5210.11F, for Marine Corps records management policy and procedures.

b. <u>Privacy Act</u>. Any misuse or unauthorized disclosure of Personally 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 (g)] and implemented per references (p) and (s).

c. <u>Forms</u>. The forms referenced within this Bulletin are available at the following URLs:

(1) NAVMC 10030, '*Commander's Records Management Acknowledgement Agreement*,' at: https://forms.documentservices.dla.mil/order.

(2) Form NA-1005, '*Verification for the Use of GRS 6.1, Email and other Electronic Messages Managed Under a Capstone Approach*,' at: https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.archives.gov%2Ffiles%2Frecords-mgmt%2Fgrs%2Fna-1005.xls&wdOrigin=BROWSELINK.

d. <u>Headquarters Marine Corps (HQMC) Administration and Resource Management Division (AR), Publishing and Logistics Management Branch (ARD) Records Management Program (ARD Records)</u>. The following mailboxes and links may be used to contact HQMC ARD Records.

(1) For questions regarding this Bulletin, send correspondence to HQMCREC-MGR@usmc.mil. Please cc SMB HQMC RMOUTREACH@usmc.mil on all submissions.

(2) For links to websites mentioned in this Bulletin, visit the following:

(a) The CROSS website at: https://play.apps.appsplatform.us/play/e/default-f4c44cda-18c6-46b0-80f2-e290072444fd/a/5046df58-51a7-424b-a6b1-93123e025052?tenantId=f4c44cda-18c6-46b0-80f2-e290072444fd&sourcetime=1734726874700&hidenavbar=true.

(b) The DON records schedules at: https://www.secnav.navy.mil/doni/Records.

(c) HQMC ARD Records website at: https://usmc.sharepoint-mil.us/sites/AR RecordsMangement.

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

5. <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.

<p style="text-align:center">P. J. ROCK JR.
Director, Marine Corps Staff</p>

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References

(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," June 2018
(c) MARADMIN 331/24
(d) MCO 5210.11F
(e) "White Paper on the Capstone Approach and Capstone GRS," April 2015
(f) NARA Bulletin 2022-02, "Resubmission of Capstone Forms," April 19, 2022
(g) 5 U.S.C. § 552a
(h) DoDI 5200.48, "Controlled Unclassified Information (CUI)," March 6, 2020
(i) "DoD Zero Trust Strategy," October 21, 2022
(j) DoD CIO Memorandum, "Use of Text Messaging on Mobile Devices and Records
    Management of Electronic Messages," September 27, 2023
(k) MCO 5750.1H
(l) MARADMIN 200/25
(m) DoDI 5015.02 w/CH-1, "DoD Records Management Program," August 17, 2017
(n) SECNAVINST 5210.8F
(o) SECNAV M-5210.1 w/CH-1
(p) SECNAVINST 5211.5F
(q) Shared Drive Migration – Getting Started Guide, "Shared Drive Migration
    Process - Getting Started," January 20, 2024
(r) 44 U.S.C. §2911
(s) MCO 5211.5

APPENDIX A

Glossary of Acronyms and Abbreviations

AR	Administration and Resource Management Division
ARD	Publishing and Logistics Management Branch
ARD Records	Records Management Program
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
DWS	Digital Workplace Services
ERM	Electronic Records Management
FY	Fiscal Year
GRS	General Records Schedule
HQMC	Headquarters Marine Corps
M&RA	Manpower and Reserve Affairs
MCCOG	Marine Corps Cyberspace Operations Group
MCEN	Marine Corps Enterprise Network
MM	Manpower Management Division
MMSL	Senior Leader Management Branch
MOS	Military Occupational Specialty
NARA	National Archives and Records Administration
PEO	Program Executive Office
PEO Digital	Program Executive Office Digital and Enterprise Services
PII	Personally Identifiable Information