



UNITED STATES MARINE CORPS  
MARINE CORPS RECRUIT DEPOT/EASTERN RECRUITING REGION  
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PARRIS ISLAND, SOUTH CAROLINA 29905-9001

DepO 5210.1  
G-1

20 SEP 2018

DEPOT ORDER 5210.1

From: Commanding General  
To: Distribution List

Subj: DEPOT RECORDS MANAGEMENT PROGRAM

Ref: (a) MCO 5210.11F  
(b) SECNAV M-5210.2  
(c) SECNAV M-5210.1  
(d) MCO 5750.1H  
(e) Section 552a, Title 5 U.S .C., Privacy Act  
(f) SECNAVINST 5210.8E  
(g) DoD Instruction 1000.30 of August 2012  
(h) DONCIO WASHINGTON D R 151450Z MAR 17  
(i) DONCIO WASHINGTON SC 081745Z NOV 17  
(j) MARADMIN 466/15 Marine Corps Command Designated  
Records Manager Program  
(k) MARADMIN 530/15 DON Tasks, Records, and Consolidated  
Knowledge Enterprise

Encl: (1) Procedures to Register as Command Designated Records Manager (CDRM)  
(2) Mandatory Annual Records Management Refresher Training

1. Situation. This order provides procedures for the implementation of the Marine Corps Recruit Depot Parris Island/Eastern Recruiting Region (MCRD PI/ERR) Records Management Program based on references (a) through (k).

2. Mission. Establish procedures for the Records Management Program, including electronic records management (ERM), and assign responsibility for its implementation and maintenance in accordance with the references.

3. Execution

a. Commander's Intent and Concept of Operations

(1) Commander's Intent. Records management is everyone's responsibility. The Records Management Program is implemented to control the creation, organization, maintenance, use, and disposition of MCRD PI/ERR records. Commands will take appropriate steps to migrate to ERM no later than 31 December 2019 utilizing an approved ERM system per reference (a).

(2) Concept of Operations. Commanding Officers, Assistant Chiefs of Staff (ACs/S), and Special Staff Officers are responsible for economical and efficient management of records. Procedural guidance for records management is contained in reference (a) which describes in detail: roles and responsibilities, file plans, records maintenance, electronic records, federal records holds, freezes and preservation orders, as well as information on archival procedures.

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b. Subordinate Element Missions(1) Commanding Officers (COs)

(a) Reference (a) defines the term "records" as: all recorded information, regardless of form or characteristics, made or received by a Federal agency under Federal Law or in connection with the transaction of public business and preserved or appropriate for preservation by that agency or its legitimate successor as evidence of the organization, functions, policies, decision, procedures, operations, or other activities of the U.S. Government or because of the informational value of data in them; and does not include library and museum material made or acquired and preserved solely for reference or exhibition purposes or duplicate copies of records preserved only for convenience.

(b) A record, regardless of medium or format, is information that accurately reflects the Command's functions, operations, policies, decisions, procedures, and essential transactions. In accordance with reference (a), ensure control of records and the proper use of reports, forms, correspondence, and directives.

(c) Keep paperwork to a minimum, eliminating duplicate files, and destroying material that has no value for record purposes.

(d) Use only Marine Corps approved ERM applications [see references (a) and (k)].

(e) Ensure proper use of Standard Subject Identification Codes (SSICs) on all records, as listed in reference (b). Contact the MCRD PI/ERR CDRM for more information on the bucket SSICs.

(f) Identify and protect all vital records, per reference (a).

(g) Appoint a CDRM in writing to perform the duties described in reference (a), and provide a copy of the appointment letter to the MCRD PI/ERR CDRM, along with a copy of the individual's current records management training certificate. The appointed CDRM will also register with the Records, Reports, and Directives Management Branch (ARDB), following the instructions in enclosure (1). (Note: MCRC PI/ERR CDRM will only require an appointment letter from O6 level commands).

(h) Appoint alternate CDRMs for subordinate sections if necessary to ensure consistent records management. CDRMs below the battalion level will not forward information to the MCRD PI/ERR CDRM, nor ARDB; unit CDRMs will maintain their subordinates appointment letters and training information for inspection purposes.

(i) Ensure all personnel receive required mandatory records management annual refresher training as described in enclosure (2).

(2) MCRD PI/ERR ACs/S and Special Staff Officers

(a) Reference (a) defines the term "records" as: all recorded information, regardless of form or characteristics, made or received by a Federal agency under Federal Law or in connection with the transaction of public business and preserved or appropriate for preservation by that agency or its legitimate successor as evidence of the organization, functions, policies, decision, procedures, operations, or other activities of the U.S.

Government or because of the informational value of data in them; and does not include library and museum material made or acquired and preserved solely for reference or exhibition purposes or duplicate copies of records preserved only for convenience.

(b) A record, regardless of medium or format, is information that accurately reflects the command's functions, operations, policies, decisions, procedures, and essential transactions. In accordance with reference (a), ensure control of records and the proper use of reports, forms, correspondence, and directives.

(c) Keep paperwork to a minimum, eliminating duplicate files, and destroying material that has no value for record purposes.

(d) Use only Marine Corps approved ERM applications [see references (a) and (k)]. Coordinate with the MCRD PI/CDRM to prepare file plans.

(e) Ensure proper use of SSICs on all records, as listed in reference (b).

(f) Identify and protect all vital records, see reference (a).

(g) Designate a Records Program Manager (RPM) to perform the duties described in paragraph 3c(1) of this order, and provide a copy of the appointment letter to the MCRD PI/ERR CDRM, along with a copy of the individual's current records management training certificate. RPM's are not required to register with Headquarters Marine Corps, but may wish to access the Records Management Knowledge Site for information, following the instructions in enclosure (1).

(h) Appoint secondary RPMs for subordinate sections if necessary to ensure consistent records management. RPMs below the AC/S or Special Staff level will not forward information to the MCRD PI/ERR CDRM, nor ARDB; section/branch RPMs will maintain their subordinate appointment and training information for inspection purposes.

(i) Ensure all personnel receive required annual training and mandatory annual refresher training as described in enclosure (2).

(3) Assistant Chief of Staff, G-1

(a) Appoint in writing a Primary CDRM (PCDRM) and Alternate CDRM (ACDRM).

1. The PCDRM/ACDRM, register with the ARDB, following the instructions in enclosure (1).

2. The PCDRM and ACDRM are directly responsible for implementing and maintaining an active and enduring records management program.

3. Staff the file plan every December and update ARDB website at : <https://eis.usmc.mil/sites/rmks/SitePages/CDRM%20Community%20Resources.aspx>.

4. The PCDRM and ACDRM will serve as the focal point for records assistance and training. Specific duties include:

a. Ensure all subordinate unit and directorate records are maintained per Navy and Marine Corps orders and directives.

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b. Provide assistance to subordinate units and directorates to identify and protect vital records in accordance with reference (a).

c. Conduct periodic staff assist visits and inspections with subordinate units and directorates to ensure compliance with the references.

d. Provide assistance to Mission Assurance, Force Protection Office on the development and implementation of a Vital Records Program as part of the Continuity of Operations Plan, per reference (a).

e. In preparation for transition to ERM, ensure all RPMs and Secondary CRDMs submit an electronic file plan via the Records Management Knowledge Site (RMKS) webpage, per reference (a).

c. Coordinating Instructions

(1) Duties for Unit CDRMs and RPMs

(a) Identify, oversee, and coordinate with section/unit points of contact to ensure that all records are maintained in accordance with the references.

(b) Solicit information from all subordinate sections to compile and maintain a section/unit file plan. Send updated file plans to the MCRD PI/ERR CDRM.

(c) Stand a periodic internal inspection by the PCDRM or ACDRM for the Records Management Program.

(d) Unit CDRMs will register with ARDB [see enclosure (1)]. RPMs are not required to register.

(e) Submit any corrections, additions, or deletions to the file outline to the MCRD PI/ERR CDRM.

(2) Electronic File Plans and Outlines. An electronic file plan is the standard for organizing and controlling electronic files. It is the method of grouping files or documents together based on their relationships to a particular subject or function. An electronic file outline maintains workflow continuity and provides at a glance, a view of all electronic files located within the office. Procedural guidance on how to create an electronic file plan is located in reference (a) or on the RMKS site located at <https://eis.usmc.mil/sites/rmks/SitePages/FilePlanSubmit.aspx>.

(3) Marine Corps Tool for Information Lifecycle Management (MCTILM). This is an out of the box SharePoint solution configuration that facilitates an ERM process. The solution manages records within SharePoint in compliance with federal and Marine Corps records management policies. In order to implement the MCTILM, major subordinate commands (MSCs) must register on the RMKS webpage, enroll into the MCTILM. Once approved, MSCs will be able to utilize MCTILM as a SharePoint solution for ERM. MSCs will utilize their File Plan/Outline for electronic records and command information for descriptive labels (i.e., metadata).

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(4) Records Disposition

(a) Ensure all records are covered by authorized retention schedules found in reference (c). Conduct an annual year-end review to ensure unnecessary records are properly disposed.

(b) Ensure no federal records are removed or destroyed without proper authority.

(c) Ensure records of historical value are preserved per references (d) and (e).

(d) Records containing personally identifiable information that are authorized for disposal must be rendered unrecognizable before being placed in a trash or recycle receptacle. Paper records must be shredded and other media (discs, hard drives, etc.) must be completely destroyed.

(5) Social Security Number (SSN) Usage Reduction

(a) Eliminate the use of the SSN in all documents unless the use meets the acceptable use criteria in reference (g). If an identifier is necessary, replace the SSN in correspondence with the electronic data interchange personal identifier (EDIPI). For example, the "To" line of a standard letter should read "Sergeant John Doe 1234567890/0111 USMC," utilizing "EDIPI" vice "SSN."

(b) Remove SSNs and any unnecessary personal information from all rosters. Recall rosters should contain only names, addresses, and telephone numbers per reference (i).

(c) Encrypt all emails containing SSNs in any form and never send to group mailboxes. Follow the guidance in reference (i).

(d) Ensure that share drive folders used for files containing SSNs or other personally identifying information are accessible only to personnel with a "need to know." Password-protect documents or folders if necessary.

(e) Do not scan documents containing SSNs unless the destination folder is only accessible by users authorized to view the information. See reference (i) for additional guidance.

(f) Do not fax documents containing SSNs, unless the exceptions listed in reference (i) apply.

(g) Review all procedures, administrative processes, and directives to ensure that any prescribed use of the SSN is justified as an acceptable use per reference (i). If the use cannot be justified, the SSN must be eliminated.

(6) Training and Guidance

(a) All personnel must complete the annual web-based training for records managers. Annual Records Management Training can be found on MarineNet, the "Leader to Led" course also satisfies the annual requirement. Civilian and contractors must complete their annual web-based training on Total Workforce Management System (TWMS).

(b) Chapter 3 of reference (a) provides a day-to-day guide to general records management.

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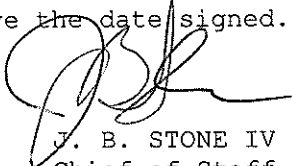
(c) All MCRD PI/ERR subordinate units and staff sections may contact the G-1 Adjutant's Office for records management assistance.

4. Administration and Logistics. Directives issued by this Headquarters are published and distributed electronically. Electronic versions of MCRD PI/ERR directives can be found on the G-1 SharePoint at <https://eis.usmc.mil/sites/mcrdpi/g1/Shared%20Documents/Forms/AllItems.aspx>

5. Command and Signal

a. Command. This order is applicable to all Marines, Sailors, and civilians of MCRD PI/ERR.

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



J. B. STONE IV  
Chief of Staff

DISTRIBUTION: A

PROCEDURES TO REGISTER AS A COMMAND DESIGNATED RECORDS MANAGER (CDRM)

1. MCRD PI/ERR subordinate CDRMs (battalion level) must register as CDRM via the Records Management Knowledge Site (RMKS) which is maintained on MCEITS (link below). If you don't have a MCEITS account, you will be directed to set that up and request access to the RMKS. Specific instructions for registration are as follows:

a. Go to the link below and follow instructions for gaining access to the RMKS page.

b. Once on the home page, click on CDRM Registration and Resources (top of left-side quick launch bar).

c. Click on Register button at top of page and follow the instructions. You will notice that they have a template for appointment letters, but since the basic information will be in your file name, a copy of your existing appointment letter should be fine. Just make sure you save a copy using the file name as directed to attach to your registration. Also note that your appointment must be dated within a year, so if you have an old appointment letter, use the template to prepare a new one. Click on the "Register" button at the top (left/right) of the page and follow the instructions. Save a copy of your appointment letter using the file name as directed to attach to your registration. Your appointment letter cannot be more than 12 months old. If required to submit a new letter, use the template provided on the website.

d. Your role will be secondary subordinate unit CDRM (you can have an alternate CDRM register as well).

e. Your region will be Marine Corps Combat Development Command (MCCDC).

2. The RMKS website is the main source for CDRM updates and resources, found at <https://eis.usmc.mil/sites/rmks>.

3. Once you have registered, please explore the announcements and resources on the other pages. Generally, you will not be responsible to respond to any taskers without coordination with the MCRD PI/ERR.

4. Even though your subordinate sections are not required to register, you should still identify section record managers (RM) for both RM and privacy act purposes.

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MANDATORY ANNUAL RECORDS MANAGEMENT REFRESHER TRAINING

Marine Corps training resources are as follows:

a. Web-based training courses are offered on the Marine Net website: Records Management (Department of the Navy): Advanced Topics (M02RMT0700) and MC Records Management Course: Every Marine's Responsibility (M01RMT0700). Go to [marinenet.usmc.mil](http://marinenet.usmc.mil) and search Records Management.

b. "Annual Records Management Training." This document is available on the DON CIO website ([www.doncio.navy.mil](http://www.doncio.navy.mil), click Browse All Topics, and select Records Management). It contains information sufficient to satisfy required training. Command Training Officers are responsible for tracking completion and maintaining records of training done with the Guide.

c. In-house group training at the command level. To access this training option, visit the HQMC ARDB home page at <https://ehqrc.usmc.mil/org/ar/ard/ardb/default.aspx> (choose email certificate upon request). Under the Records Management Training menu, click Records Management and Vital Records to access this PowerPoint package.