



UNITED STATES MARINE CORPS
CHIEF DEFENSE COUNSEL OF THE MARINE CORPS
MARINE CORPS DEFENSE SERVICES ORGANIZATION
755 SOUTH COURTHOUSE ROAD, BUILDING 2, SUITE 1000
ARLINGTON, VA 22204-2482

IN REPLY REFER TO
3000
CDC
1 Jul 2019

CDC POLICY MEMORANDUM 2.8

From: Chief Defense Counsel of the Marine Corps
To: Distribution List

Subj: USE OF DEFENSE SERVICES ORGANIZATION SHAREPOINT

Ref: (a) CDC PM 1.2A
(b) CDC PM 2.1B

1. **Purpose.** Establish and improve standing operating procedures for the Marine Corps Defense Services Organization (DSO) usage of the DSO SharePoint.

2. **Discussion.** The SharePoint is the central hub for DSO materials, case management, data, and communications. Effective use of the SharePoint is vital in the zealous representation of our clients and enhances the value and efficiency of our Organization.

3. **Policy.** There are four uses of the SharePoint that are of the highest importance to the DSO as an organization and each individual Defense Counsel (DC). The precise tracking of cases through the Case Information System is simply an ethical must for any law firm. The Discussion Forum is equally essential to the development of a professional group of advocates with a common purpose. Acquittal Alerts is the sole way we have to communicate which trial strategies work in the real world. Lastly, the importance of the care of Suicidal Clients goes without saying.

a. **Case Information System (CIS).** CIS is a simple case-management tool that displays the active and closed cases of the specific region, detailing reports, and encounters. Its capabilities include the ability to move cases to the detailed counsel, as well as the assistant counsel's main page. It is the responsibility of the Regional Defense Counsel (RDC) and Senior Defense Counsel (SDC) to ensure that their DC and Defense Services Specialists (DSSs) are updating the information for each case when it is received.

(1) All branch offices will use CIS to track their encounters. Encounters are added when a client visits the DSO Branch Office for a walk-in counseling. It is vital to add encounters to CIS to give each office the ability to do proper conflicts of interest checks and for effective numbers tracking.

(2) Creating a case occurs when the branch office accepts the case. When creating the case, the case status, region, branch office, and last name of the accused will immediately be

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added. It is the responsibility of the DC or DSS to update cases as necessary when other milestones occur or information becomes available.

(3) Once a case has a detailed DC, the entry can then be found on the respective DC's CIS homepage, which allows the DC to see their active and closed cases all in one view.

(4) The detailing report is used to track all cases assigned to a DC in a specific region. It also shows when a case does not have an assigned DC. A DSS from each branch office will check the report at least weekly to ensure each case has an assigned DC.

b. Discussion Forum. This forum is used by all DC to share information, discuss common practices, seek advice, and obtain support from fellow DC. The discussion forum is a non-retribution platform. Specifically, branch office and regional leadership will encourage their counsel to post within the forum and will not create any restrictive policies, i.e. counsel must consult with local leadership prior to posting. Additionally, all responses to posts will be professional and collegial¹. Engagement in the discussion forum will be factored into regional and branch office fitness reports.

c. Acquittal Alerts. The DSO may not always receive a full or partial acquittal for the cases we try. However, when we do, the rest of our Organization needs to know.

(1) When posting an acquittal alert, ensure that you have all the required information, including teaching points, lessons learned, and other comments that may be beneficial to the DSO as a whole.

(2) For partial acquittals, utilize the alert when there is an acquittal on the principle charge. For significant comments in other cases, use the discussion forum.

d. Suicidal Ideations. When a client has suicidal ideations, attempts suicide, or commits suicide, a CCIR will be submitted to the CDC. After that CCIR is submitted, the assigned counsel will update the Suicidal Clients tab.

(1) Required information for a new suicidal client entry is the suicide type, client's name, rank, the date, notes about the incident, and the region/branch office. Do not insert PII as these entries may be shared with other agencies.

(2) An entry for suicidal clients is also required on the DSO Litigation site under suicide reports. A DSS will input the information for this page.

¹ The Commander's Intent for the Discussion Forum is for every DC to want to use it as a place to seek help and, equally importantly, as a place for more experienced DC to help others. As such, each DC's use of the forum will be part of that DC's evaluation and each region and branch office will enforce the rules set out by me are followed through the evaluation of each DC.

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4. Admin and Logistics

a. Each RDC and SDC will ensure all DC and DSS are using the SharePoint properly; e.g., DSO Personnel, Discussion Forum, Acquittal Alerts, DCAP Standard Forms, CIS, Suicidal Clients, Reference Library, and the DSO Litigation tab.

b. Regional Defense Chiefs (RD Chiefs) are responsible for ensuring that the Bio Data Sheets are uploaded and the Personnel Tracker is up to date for their region at all times under the DSO Personnel tab. If there is a new DC or DSS, the DSO Chief will grant them their SharePoint permissions. The RD Chiefs, at minimum, will check the tracker once a month to ensure the information is correct.

c. The RDC and SDC will ensure that their DC set up alerts for the SharePoint. It is required that they receive alerts for the Discussion Forum², DCAP Standard Forms, Acquittal Alerts, and Reference Library. The DC and DSSs can decide if they would like to receive alerts from other lists on SharePoint.

d. For all SharePoint issues and questions, contact the DSO Chief at 703-604-0728.

5. Conclusion. This CDC Policy Memo is effective immediately.

W. N. PIGOTT
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Distribution:

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Legal Chief of the Marine Corps

All Marine Corps SJAs

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All Members of the DSO

² Having each DC get the alerts is a necessary component of my endstate for the Discussion Forum. A DC in court who has to produce a request or bench brief while in court should be able to post on the forum and have other DC come to assist immediately.