



U.S. COAST GUARD

Ombudsman & Personal Financial Management Program

Registry User Guide for Command Financial Specialists

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This user guide provides the procedures for a Command Financial Specialist (CFS) required for using the USCG Personal Financial Management Program Registry. For the purposes of this guide, the term Commander refers to all command designees in the registry.

1.1 Command Financial Specialist Registration

A Command Financial Specialist (CFS) cannot register or assign themselves to a command. The Personal Financial Manager and the Commanding Officer registration sections are only for Health, Safety & Work-Life Regional Practice (HSWL RP) Personal Financial Managers, Commanding Officer/Officer-in-Charge/Command Designees. Please contact one of the following as these are the only personnel that may register and assign a CFS to a command:

- The Commanding Officer/Officer-in-Charge/Command Designees
- Health, Safety and Work-Life Regional Practice (HSWL RP) Personal Financial Managers
- Personal Financial Management Registry Program Manager

1.2 Command Financial Specialist Login

Once you have been registered by your representative, you will receive an automatically generated USCG Command Financial Specialist assigned email and another email 'Verify Email Address' containing an activation link as shown below. **You must verify your email before you can log into the registry.**

USCG Command Financial Specialist assigned

From: United States Coast Guard Registry <no-reply@ombudsmanpmpregistry.org>
To: <john.doe@uscg.mil>

[Show Headers](#)

HTML

HTML Source

Text

Raw

Spam Analysis

HTML Check

Tech Info



United States Coast Guard

You have been assigned as a Command Financial Specialist for a USCG unit. You will receive another email to verify your email address and set up a password to access your account.

Regards,
United States Coast Guard

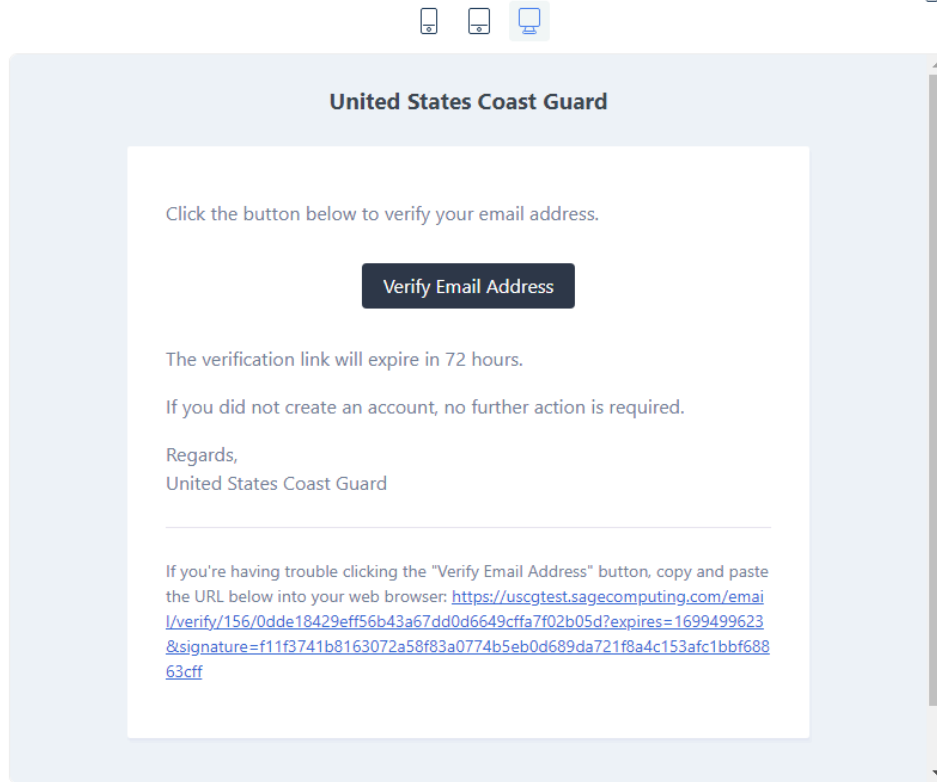
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Verify Email Address

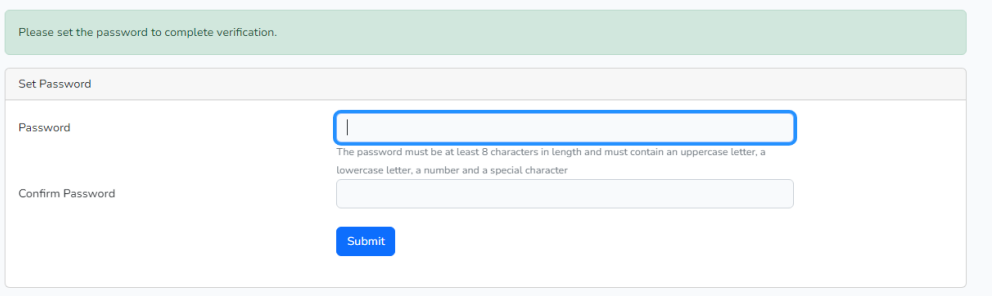
From: United States Coast Guard Registry <no-reply@ombudsmanpfmpregistry.org>
 To: <john.doe@uscg.mil>

Show Headers

HTML HTML Source Text Raw Spam Analysis HTML Check Tech Info



To login to the Personal Financial Management Program Registry, complete the following steps:

Step	Action
1	Click the Verify Email Address link provided in the Command Financial Specialist Registry email.
2	Set your new password in the email verification screen and click Submit 
3 (Optional)	Two-factor authentication by email is enabled by default. Optionally, if you want to enable a secondary two-factor authentication using Authenticator App, click Enable next to the 2FA using Authenticator App.

Password has been set successfully. 2FA by email has been enabled. Please login.

Two-Factor Authentication (2FA)

Email: (Enabled by default)

You will get an email with a two-factor authentication code when you log in.

Enabled

2FA using Authenticator App:

Use an application on your phone to get two-factor authentication codes when you log in.

Enable

Click 'Generate QR code to Enable 2FA' button in the next screen.

Password has been set successfully. 2FA by email has been enabled. Please login.

Two-Factor Authentication (2FA)

Email: (Enabled by default)

You will get an email with a two-factor authentication code when you log in.

Enabled

2FA using Authenticator App:

Use an application on your phone to get two-factor authentication codes when you log in.

Enable

Using your mobile device scan the QR code generated with an authenticator app like Google Authenticator.

Two Factor Authentication using Authenticator App

Enter the pin code to enable 2FA.

1. Scan this barcode with your Google Authenticator App:



2. Enter the pin the code to Enable 2FA

Authenticator Code

Enable 2FA

Enter the code shown in the authenticator app on your mobile device and click **Enable 2FA**. Once code is validated, you will see the configuration screen. If you enabled the secondary 2FA by mistake, you can disable it by clicking **Disable** next to authentication method.

You've successfully enabled Two-Factor Authentication via Authenticator app.

Two-Factor Authentication (2FA) Methods

Enable at least one of the below 2FA methods

Authenticator app	Enabled	Enable	Disable
Email Address	Enabled vsanku@gmail.com	Disable	

3

From the Registry login screen, enter your email address and new password that was set in step 1, and then click **Login**.

Login

Email Address

Password

[Login](#) [Forgot Your Password?](#)

Enter the 2FA code that you received in your email in the next screen.

Two Factor Authentication

[Enter your verification code](#)

An email with the verification code was just sent to vsanku@gmail.com

Code

[Verify](#)

[Resend code](#)

[Try another way](#)

(Optional) If you had set secondary 2FA method then you can click '**Try another way**' and enter the code from Authenticator App in the secondary authentication code.

Two Factor Authentication

[Enter your verification code](#)

An email with the verification code was just sent to vsanku@gmail.com

Code

[Resend code](#)

[Try another way](#)

Open the two-factor authentication app on your device to view your authentication code and verify your identity.

Authentication code

You have forgotten your password
OR
Your password does not work

Click '**Forgot Your Password?**' link on login screen. Enter your email address and click '**Send Password Reset link**' button.

Reset Password

Email Address

You have forgotten the email address
OR
Your email address does not work

Click the **CG Support** link under **Resources** on homepage and fill the form.


Support

Name

Email

Subject

Message

al Policy  Resources

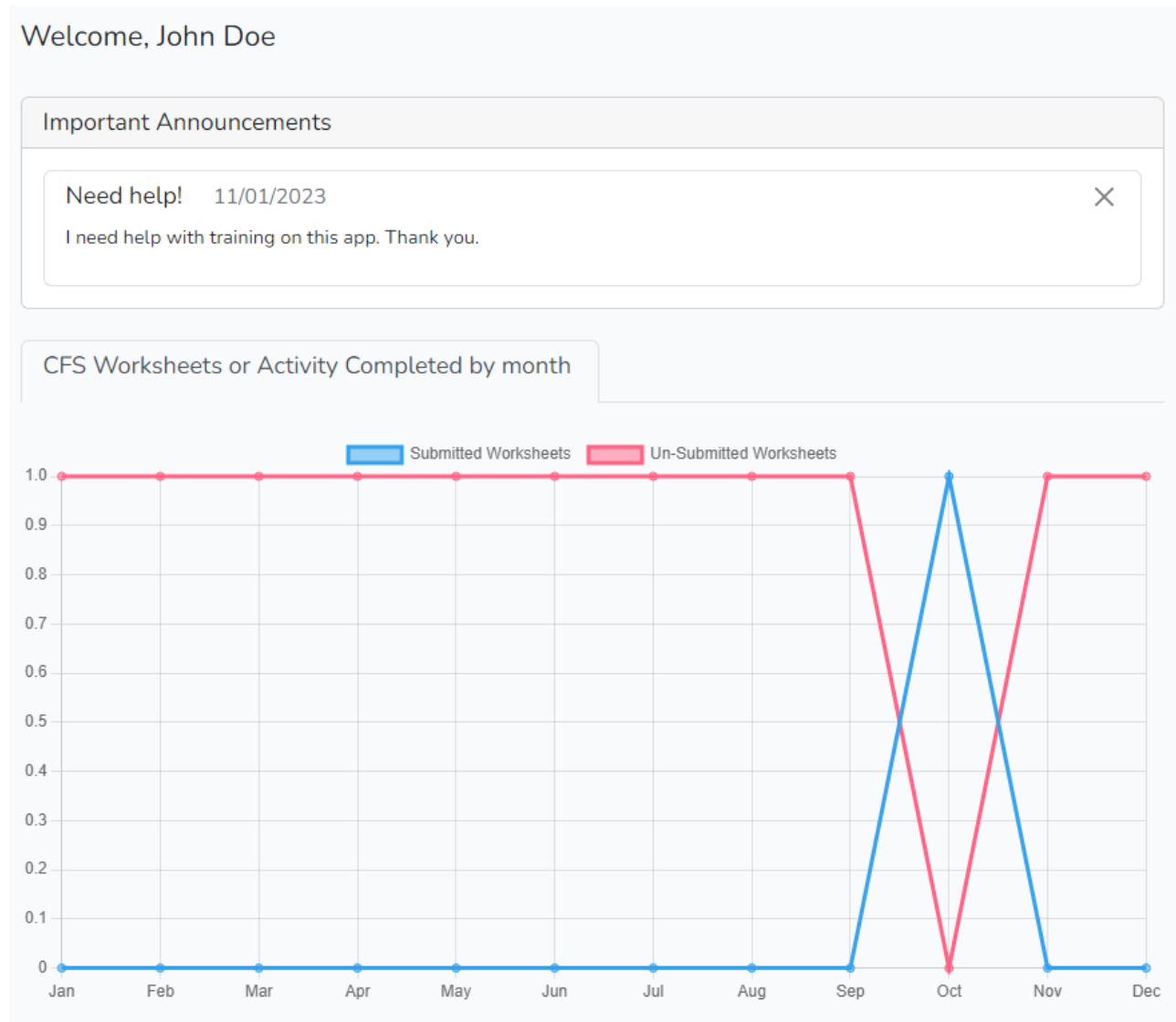
CG SUPRT

1.3 Dashboard

When you login to the registry, Dashboard is the landing page.

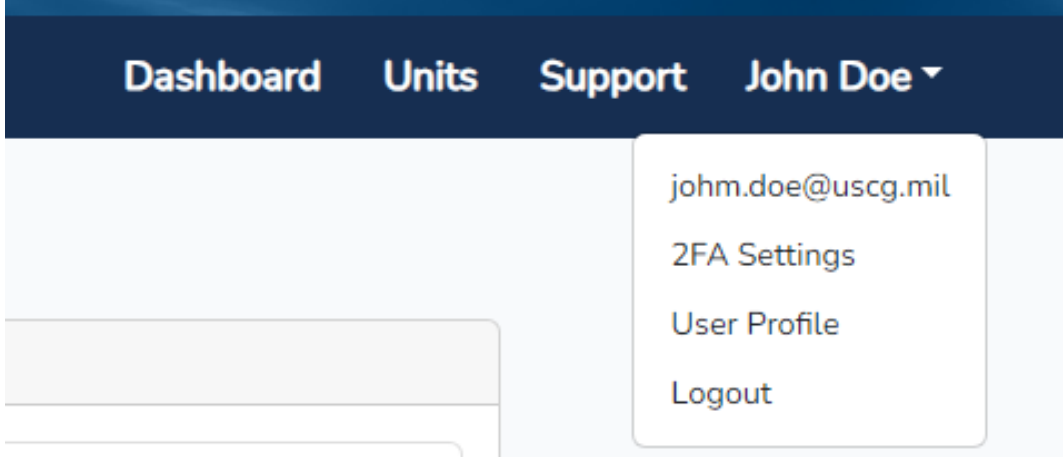
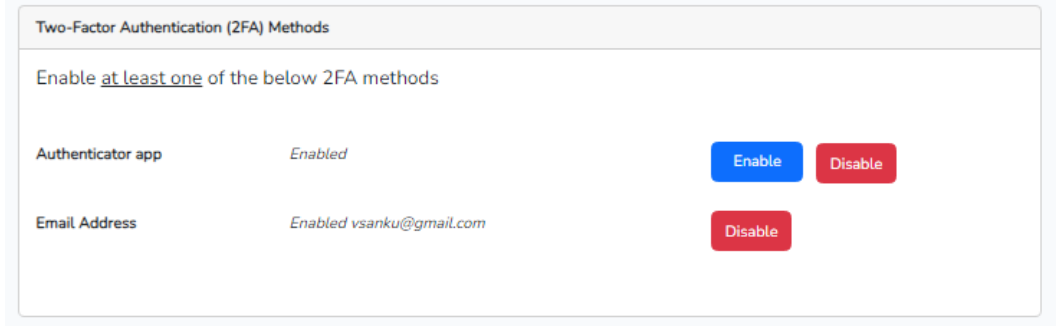
The Dashboard shows any Announcements posted by: Health, Safety, and Work-Life Regional Practice (HSWL RP) Personal Financial Managers and Personal Financial Management Registry Program Manager.

The Dashboard also shows worksheets summary by month. Clicking on the chart for a particular month shows the units list for that month.



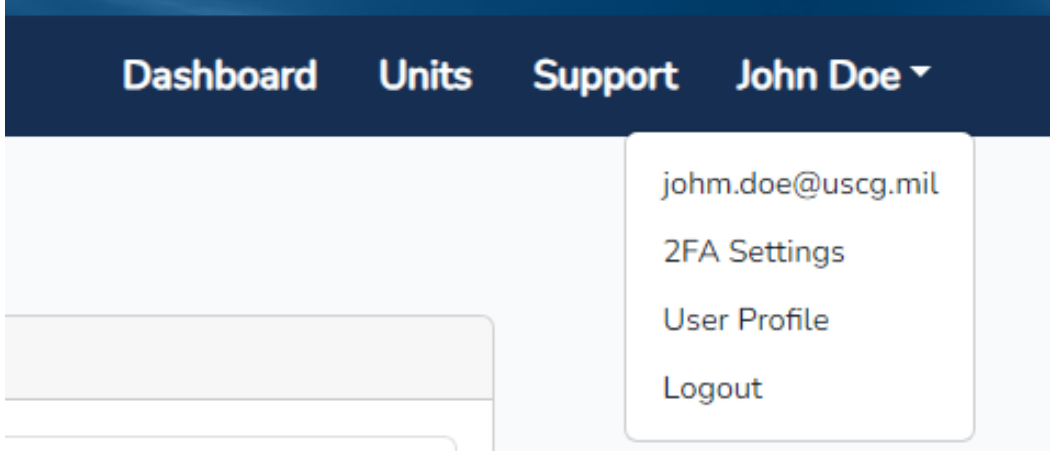
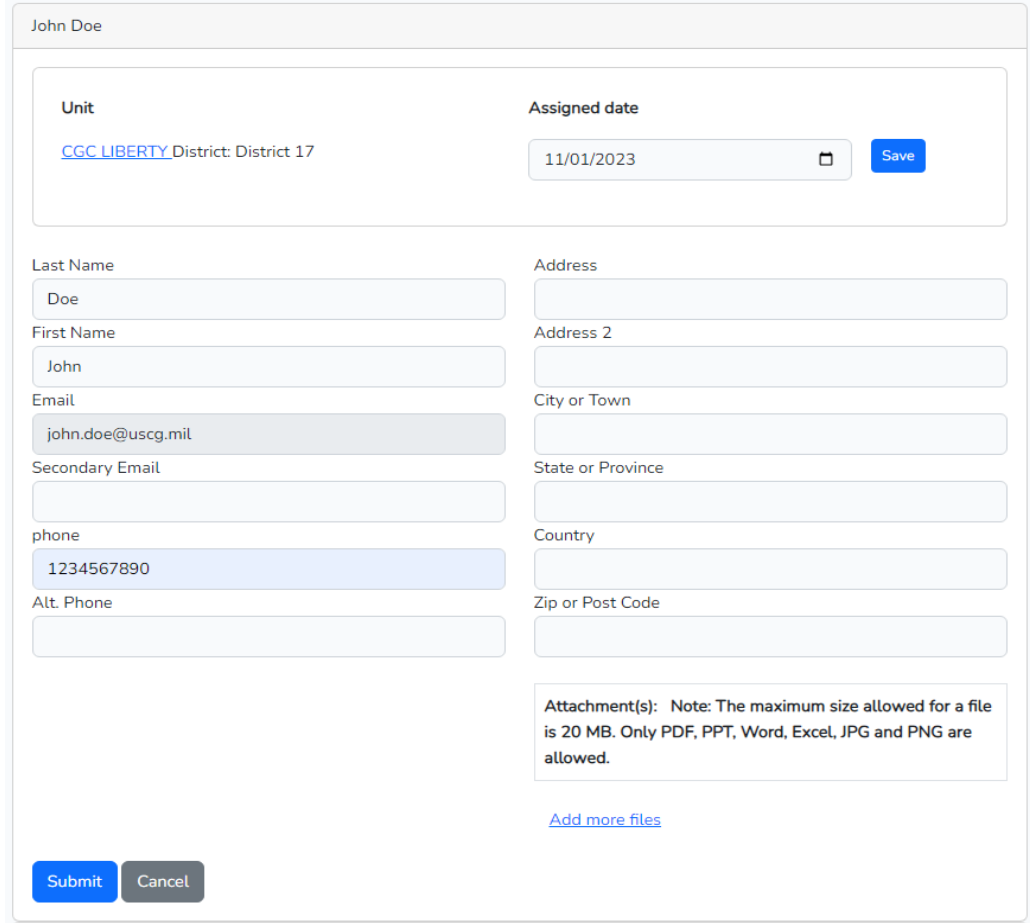
1.4 Updating Two-Factor Authentication (2FA) Method

To reset 2FA authentication method:

Step	Action
1	<p>Click on your name in the menu bar and click on 2FA Settings option shown below.</p>  <p>The screenshot shows a dark blue navigation bar with the following items: 'Dashboard', 'Units', 'Support', and 'John Doe' with a dropdown arrow. The dropdown menu is open, showing the email address 'johm.doe@uscg.mil' and three options: '2FA Settings', 'User Profile', and 'Logout'.</p>
2	<p>You can Enable or Disable a particular 2FA method by clicking the Enable and Disable buttons.</p>  <p>The screenshot shows a settings page titled 'Two-Factor Authentication (2FA) Methods'. It contains the instruction 'Enable <u>at least one</u> of the below 2FA methods'. There are two methods listed: 'Authenticator app' which is currently 'Enabled' and has 'Enable' and 'Disable' buttons; and 'Email Address' which is 'Enabled vsanku@gmail.com' and has a 'Disable' button.</p>

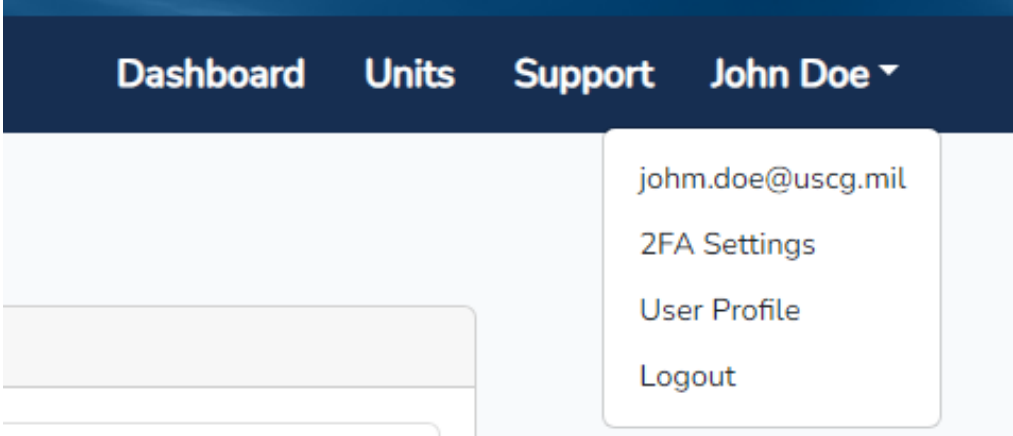
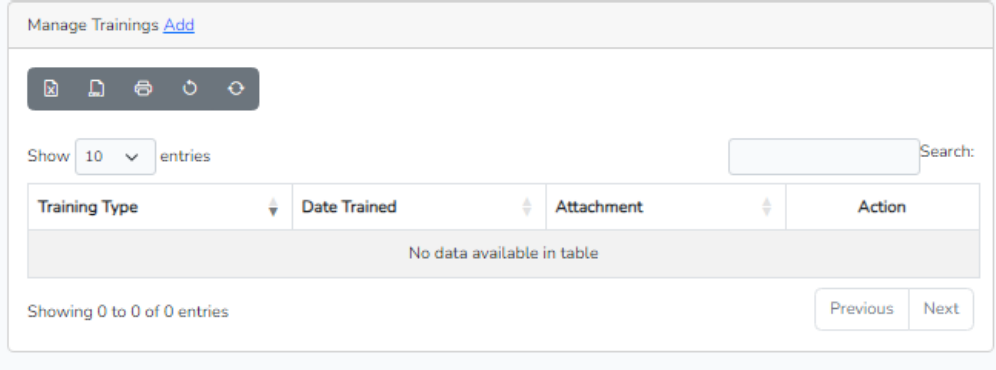
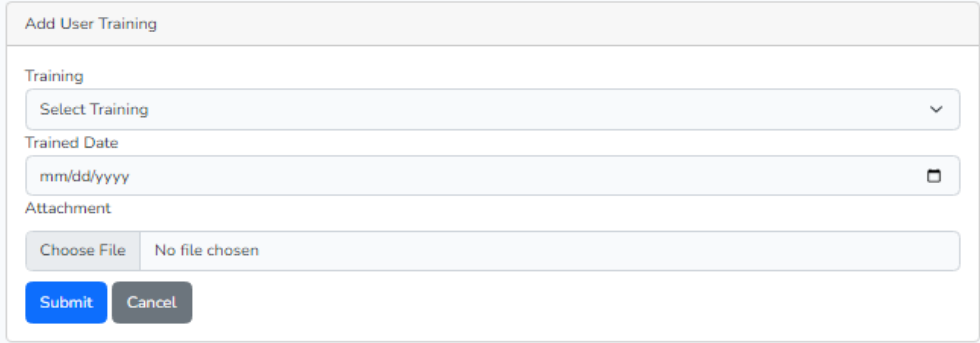
1.5 Update Your Profile

To update your name, phone, address:

Step	Action
1	<p>Click on your name in the menu bar and click on User Profile option.</p>  <p>The screenshot shows a dark blue navigation bar with the following items: 'Dashboard', 'Units', 'Support', and 'John Doe' with a downward arrow. A dropdown menu is open under 'John Doe', listing: 'johm.doe@uscg.mil', '2FA Settings', 'User Profile', and 'Logout'.</p>
2	<p>Change or enter your information.</p>  <p>The screenshot shows a form titled 'John Doe'. It contains the following fields and sections:</p> <ul style="list-style-type: none">Unit: CGC LIBERTY District: District 17Assigned date: 11/01/2023 (with a calendar icon) and a Save button.Last Name: DoeFirst Name: JohnEmail: john.doe@uscg.milSecondary Email: (empty)phone: 1234567890Alt. Phone: (empty)Address: (empty)Address 2: (empty)City or Town: (empty)State or Province: (empty)Country: (empty)Zip or Post Code: (empty) <p>Attachment(s): Note: The maximum size allowed for a file is 20 MB. Only PDF, PPT, Word, Excel, JPG and PNG are allowed.</p> <p>Add more files</p> <p>Submit Cancel</p>
3	<p>Click Submit.</p>

1.6 Update Trainings

To add/edit/delete your training(s) information:

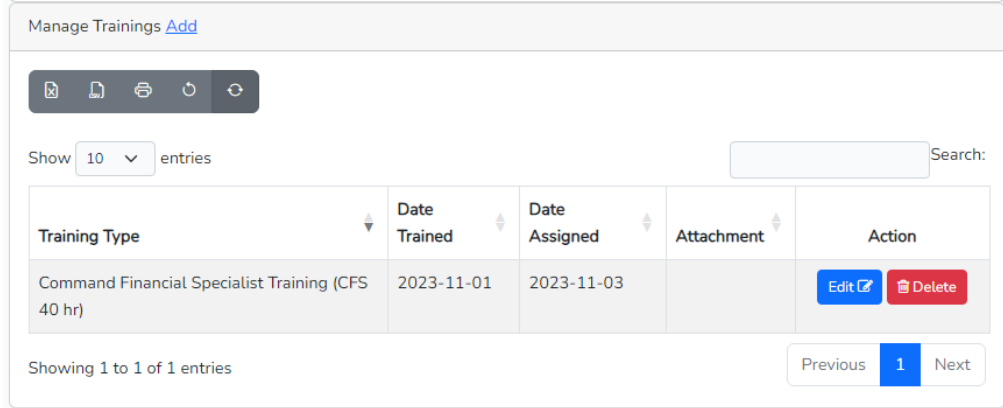
Step	Action
1	<p>Click on your name in the menu bar and click on User Profile option. The trainings information is at the bottom of the page.</p>  <p>The screenshot shows a dark blue navigation bar with the following items: Dashboard, Units, Support, and John Doe with a dropdown arrow. The dropdown menu is open, showing the following options: johm.doe@uscg.mil, 2FA Settings, User Profile, and Logout.</p>
2	<p>Add Training To add any training information the user has completed, click on Add link next to Manage Trainings.</p>  <p>The screenshot shows the 'Manage Trainings' interface. It includes a toolbar with icons for refresh, print, and search. Below the toolbar, there is a 'Show 10 entries' dropdown and a search box. A table with columns 'Training Type', 'Date Trained', 'Attachment', and 'Action' is shown, but it contains no data. At the bottom, it says 'Showing 0 to 0 of 0 entries' and has 'Previous' and 'Next' buttons.</p> <p>Enter the Training information.</p>  <p>The screenshot shows the 'Add User Training' form. It has the following fields: 'Training' (a dropdown menu with 'Select Training' selected), 'Trained Date' (a date input field with 'mm/dd/yyyy' placeholder), and 'Attachment' (a file upload field with 'Choose File' and 'No file chosen' text). At the bottom, there are 'Submit' and 'Cancel' buttons.</p>

Click **Submit**.

3

Edit Training

To edit any existing training information, click on **Edit** button next the particular training.



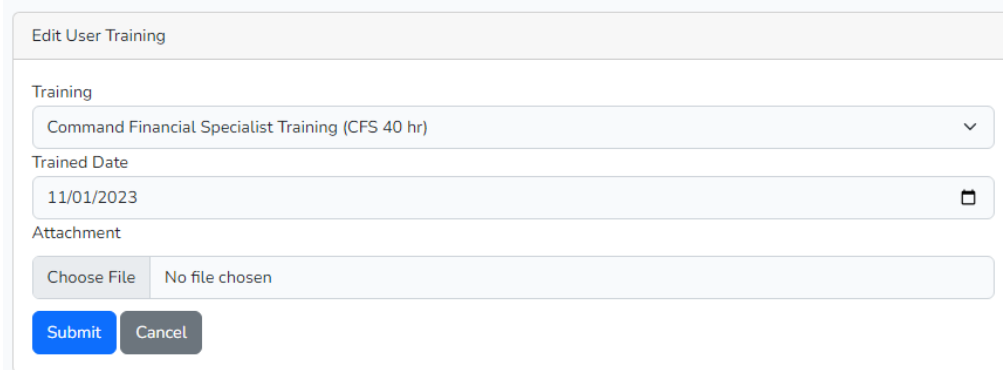
Manage Trainings [Add](#)

Show 10 entries Search:

Training Type	Date Trained	Date Assigned	Attachment	Action
Command Financial Specialist Training (CFS 40 hr)	2023-11-01	2023-11-03		Edit Delete

Showing 1 to 1 of 1 entries Previous 1 Next

Update any details in the training information screen.



Edit User Training

Training
Command Financial Specialist Training (CFS 40 hr)

Trained Date
11/01/2023

Attachment
Choose File No file chosen

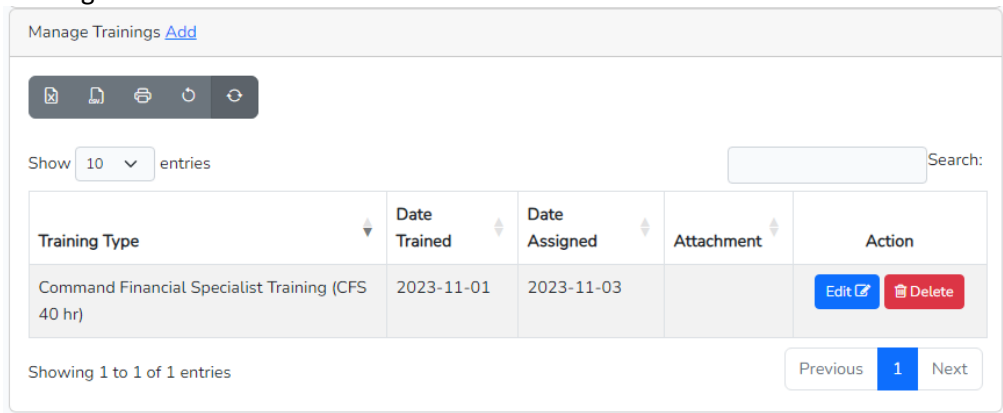
[Submit](#) [Cancel](#)

Click **Submit**.

4

Delete Training

To delete any existing training information, click on **Delete** button next the particular training.



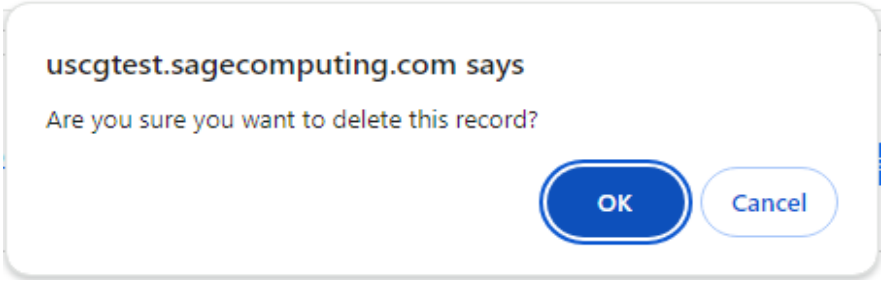
Manage Trainings [Add](#)

Show 10 entries Search:

Training Type	Date Trained	Date Assigned	Attachment	Action
Command Financial Specialist Training (CFS 40 hr)	2023-11-01	2023-11-03		Edit Delete

Showing 1 to 1 of 1 entries Previous 1 Next

The system will show a pop-up warning message.

	 <p>uscgtest.sagecomputing.com says Are you sure you want to delete this record?</p> <p>Click OK button to confirm the delete.</p>
--	---

1.7 Monthly Worksheets

Command Financial Specialists are required to submit monthly worksheets. Command Financial Specialists will submit their monthly worksheets no later than the 10th of each month following the report month (i.e., June worksheets will be submitted NLT 10 July). Worksheets are archived by calendar year and all worksheets must be entered by midnight eastern time on 31 January of the following year. After 31 January no further worksheets can be entered (i.e., Dec 2023 worksheets must be entered by midnight eastern time on 31 January 2024).

The Commanding Officer may want to view the monthly worksheet prior to the Command Financial Specialist submitting it; therefore, Commanders may direct the Command Financial Specialist to save the worksheet as a draft, then the Commanding Officer can submit the final document through the registry.

- If the worksheet is saved as draft, you can return to edit and make changes.
- If you have submitted a final worksheet and discover you have made errors, you can still edit the worksheet and make changes.
- The system can timeout without providing a notification. It is advised that Command Financial Specialists often save the worksheet as a draft when entering their data.

Units can only submit one worksheet per month. For units with two or more Command Financial Specialists, each Command Financial Specialist should submit their worksheet independently and the system will combine the worksheets. A Command Financial Specialist assigned to more than one unit, must complete a separate Command Financial Specialist Monthly Worksheet for each command assignment. Even if there is no data for a unit, a worksheet still needs to be completed with a zero and submitted as final.

1.7.1 Complete a Worksheet

To complete and submit a monthly worksheet:

Step	Action
1	Click Units from the top menu bar. 

2

Click the **View Worksheets** link next to the unit row.

Units List

Show 10 entries

Name	OPFAC	Regional Practice	District	Action
CGC LIBERTY	13434	Juneau (D17)	District 17	

Showing 1 to 1 of 1 entries

Previous 1 Next

3

Click **New**.

Worksheets List for CGC LIBERTY

+ New

Show 10 entries

Month	Year	Name	Created At	Updated At	Status	Action
No data available in table						

Showing 0 to 0 of 0 entries

Previous Next

4

Enter data.

[Units](#) / [CGC LIBERTY Worksheets](#) / Create Worksheet

Worksheet Detail

Month: Year:

Contacts

Total Time Spent Performing CFS Duties

Total Contacts Made

Touchpoint Trainings Provided

	# 1 on 1	# Group/Class	# Participants
First Duty Station	<input type="text"/>	<input type="text"/>	<input type="text"/>
Promotion	<input type="text"/>	<input type="text"/>	<input type="text"/>
PCS	<input type="text"/>	<input type="text"/>	<input type="text"/>
Working in the TSP	<input type="text"/>	<input type="text"/>	<input type="text"/>

5


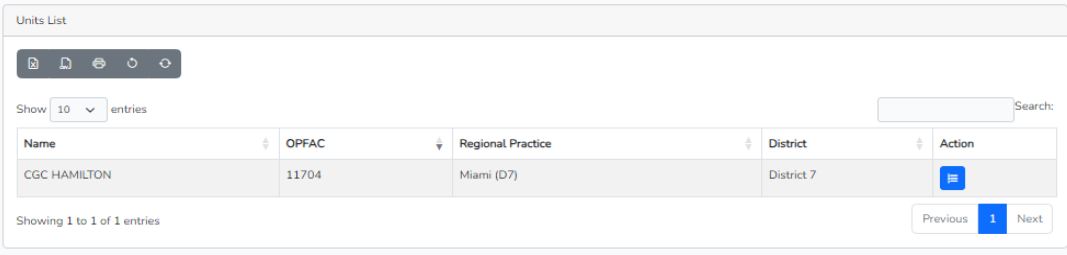
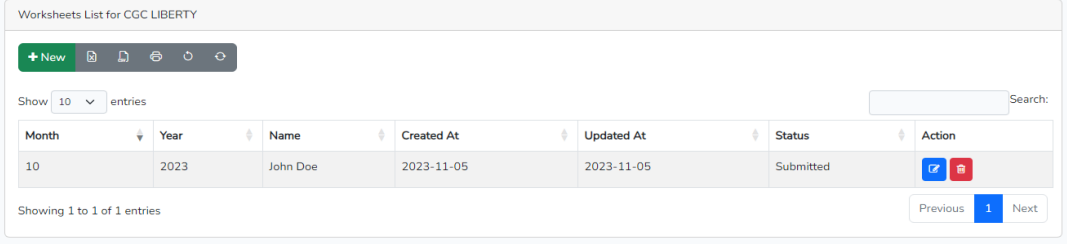
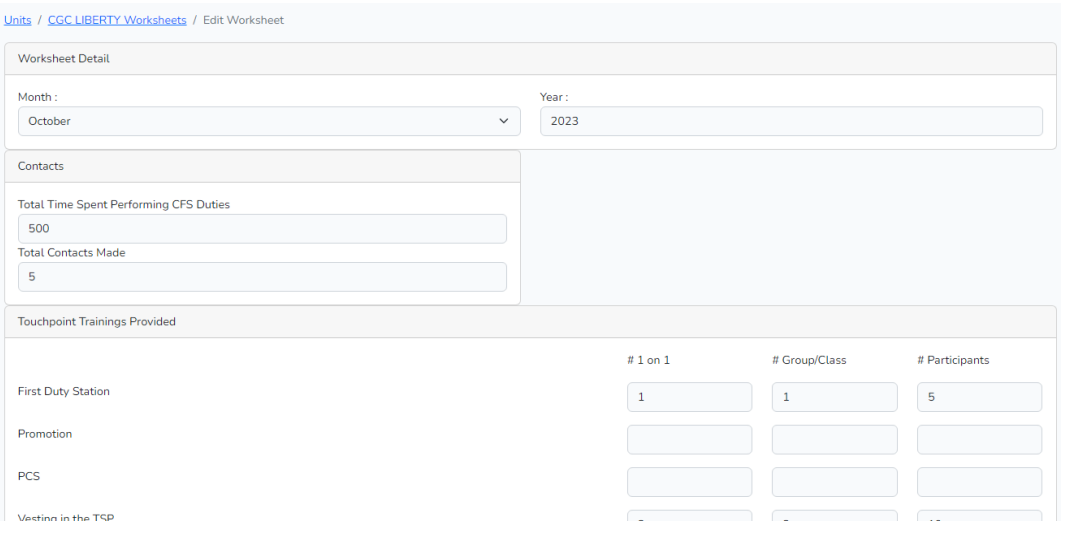
Click **Submit as Final** or **Save as Draft**.

Facilitate Command Financial Specialist (CFS) Course with PFM (Must be Train-the-Trainer)

	# Sessions Provided	# Participants
Virtual CFS 5 Day Course	<input type="text"/>	<input type="text"/>
In Person CFS 5 Day Course	<input type="text"/>	<input type="text"/>
Total		

1.7.2 Review or Edit Worksheet

To review or edit an individual monthly unit worksheet.

Step	Action
1	<p>Click Units from the top menu bar.</p> 
2	<p>Click the View Worksheets link next to the unit row.</p> 
3	<p>Click the Edit Worksheet link next to the particular worksheet you want to edit or review.</p> 
4	<p>Review or Edit any data you want to update.</p> 
5	<p>Click Submit as Final or Save as Draft.</p>

Facilitate Command Financial Specialist (CFS) Course with PFM (Must be Train-the-Trainer)


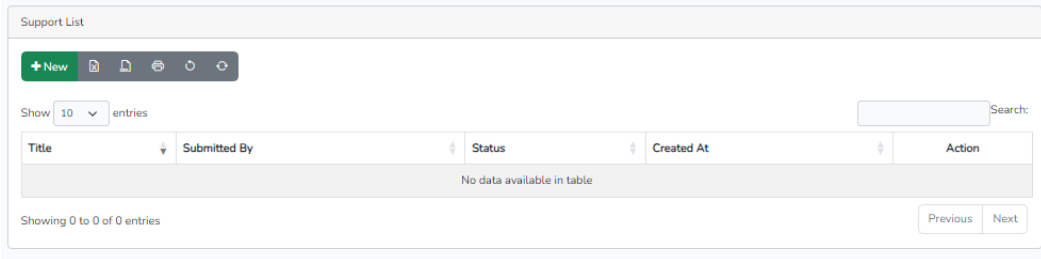
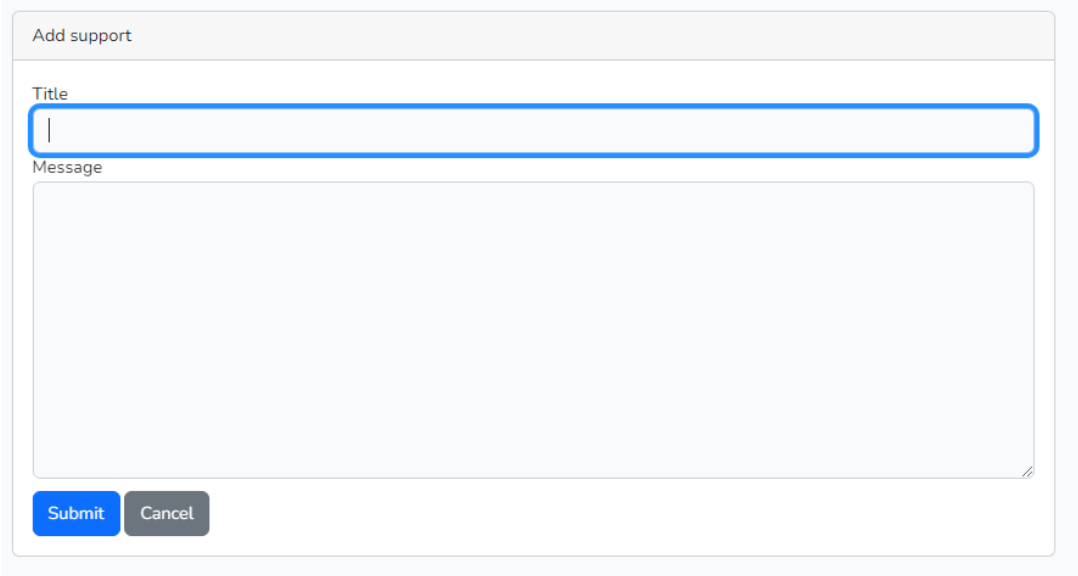
	# Sessions Provided	# Participants
Virtual CFS 5 Day Course	<input type="text" value="1"/>	<input type="text" value="5"/>
In Person CFS 5 Day Course	<input type="text"/>	<input type="text"/>
Total	1	5

1.8 Support

If at any time, you have problems or questions regarding the Registry you can submit a support case request.


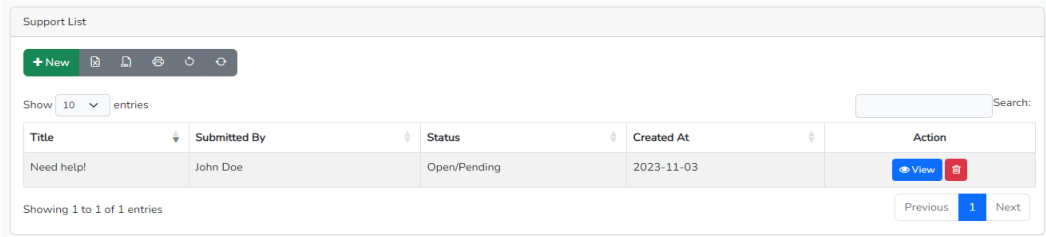
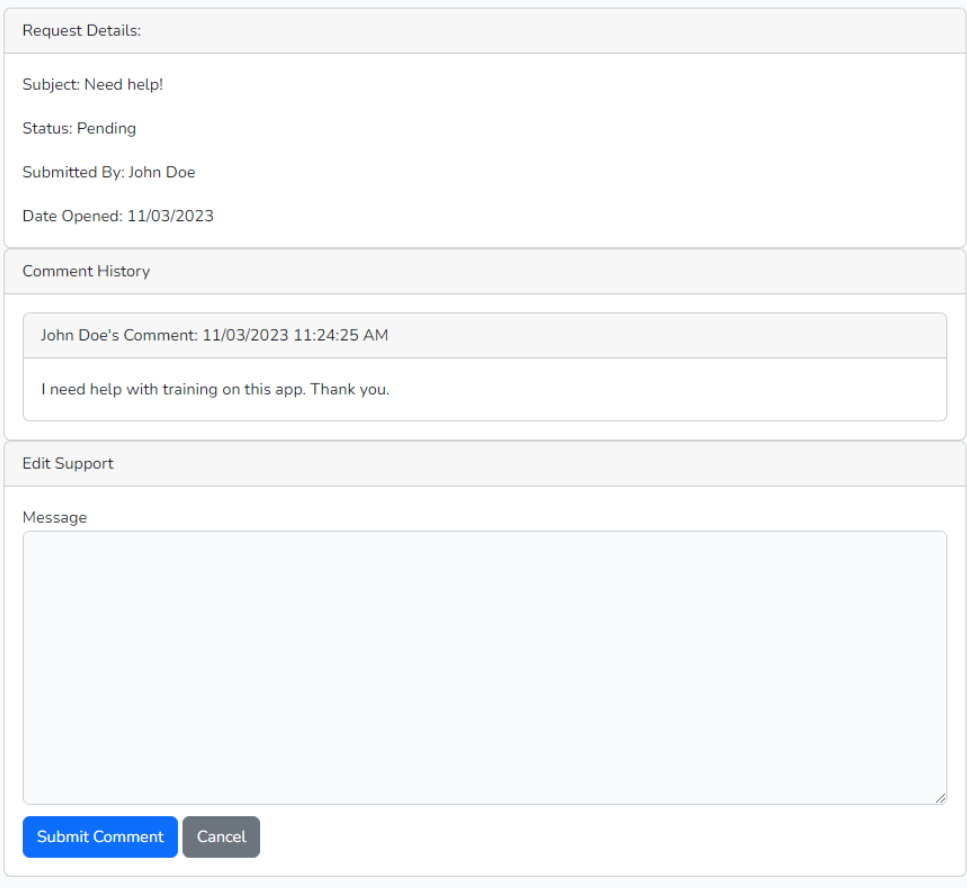
1.8.1 New Support Request

To submit a support case request:

Step	Action
1	<p>Click Support from the top menu bar.</p> 
2	<p>Click New.</p> 
3	<p>In the Subject field, enter the subject of the support request. In the Comment field, enter comments or questions that describe the support request.</p> 
4	<p>Click Submit.</p>

1.8.2 Add Comment to Support Request

Add a comment to an existing support case request:

Step	Action
1	<p>Click Support from the top menu bar.</p> 
2	<p>Click View next to the support case row.</p> 
3	<p>Add new comment in Message box under Edit Support section.</p> 
4	<p>Click Submit Comment.</p>