



# U.S. COAST GUARD

Ombudsman & Personal Financial Management Program

Registry User Guide for Commanders

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This user guide provides basic procedures to Ombudsman and Personal Financial Management Program (PFMP) Commanders on using the CG Ombudsman Registry. These procedures include assigning Ombudsman and Command Financial Specialist (CFS) to units within the registry, and running reports.

### 1.1 Ombudsman Registration

**Ombudsmen cannot register or assign themselves to a command.** The Ombudsman Program Manager, Commanding Officer/Officer-in-Charge, Command Designee, Regional Ombudsman Coordinators, and HSWL RP Ombudsman Coordinators have the ability to register and assign Ombudsmen to their unit(s). Per COMDTNST 1750.4 (series), it is the command’s responsibility to ensure that their command is registered, Ombudsman/Ombudsmen are assigned, and worksheet data is submitted.

### 1.2 Command Financial Specialist (CFS) Registration

**Command Financial Specialist cannot register or assign themselves to a command.** The PFMP Program Manager, Commanding Officer/Officer-in-Charge, Command Designee, and Personal Financial Manager have the ability to register and assign CFS to their unit(s). Per COMDTNST 1750.4 (series), it is the command’s responsibility to ensure that their command is registered, Ombudsman/Ombudsmen/CFS(s) are assigned, and worksheet data is submitted.

### 1.3 Commander Registration

To register as a Commander, go to <https://www.ombudsmanpfmpregistry.org/ombregistry> and complete the Commander Registration form. Complete the steps in the table below to register.

Step	Action
1	Under ‘Family Ombudsman Program Registry’ section, click on ‘Register as Commander / Command Designee’ link.

	<div style="background-color: #003366; color: white; padding: 5px; text-align: center;"> <a href="#">HOME</a>   <a href="#">CONTACT YOUR OMBUDSMAN</a> </div> <div style="text-align: center; margin-top: 10px;"> <h3 style="margin: 0;">FAMILY OMBUDSMAN PROGRAM REGISTRY</h3> </div> <div style="display: flex; align-items: flex-start; margin-top: 10px;">  <div style="font-size: small;"> <p><b>Commander / Command Designee</b></p> <p>Commanders or Command Designees must be registered to access the registry. Once you have completed the registration form, your request will be submitted for approval. You will be notified by email upon approval.</p> <p style="text-align: center;"><a href="#">Register as Commander / Command Designee</a></p> </div> </div> <div style="margin-top: 10px; border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>Commander Type</span> <span>Address *</span> <span>✕</span> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p><input type="checkbox"/> Are you registering as Command Designee?</p> <p><input type="checkbox"/> District   <input type="checkbox"/> Area</p> <p>Rank *</p> <p>--Select One--</p> <p>First Name *</p> <p>_____</p> <p>Last Name *</p> <p>_____</p> <p>Email *</p> <p>_____</p> <p>Secondary Email</p> <p>_____</p> <p>Phone *</p> <p>_____</p> <p>Alternate Phone</p> <p>_____</p> <p style="text-align: center; margin-top: 5px;"><a href="#">Submit</a></p> </div> <div style="width: 45%;"> <p><input type="checkbox"/> FPO Format</p> <p>Address Line 1</p> <p>_____</p> <p>Address Line 2</p> <p>_____</p> <p>City</p> <p>_____</p> <p>State</p> <p>_____</p> <p>Country</p> <p>_____</p> <p>Zip</p> <p>_____</p> </div> </div> </div>						
2	If you are registering as a Commander Designee, click the checkbox ‘Are you registering as Command Designee?’ and select the type from the dropdown.						
3	Select appropriate checkbox for District or Area Commander.						
4	From the District/Area drop down menu, select your District/Region.						
5	Enter requested information (e.g., last name, first name, email, etc.) in the corresponding box.						
6	<p>Click <b>Submit</b>.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">IF...</th> <th style="width: 50%;">THEN...</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">Successfully submitted</td> <td style="padding: 5px;">Submission Sent Successfully message will display. </td> </tr> <tr> <td style="padding: 5px;">Submission was not successful</td> <td style="padding: 5px;">Error message will display. Try again, if error message displays, contact one of the registry administrators listed at the end of these directions.</td> </tr> </tbody> </table>	IF...	THEN...	Successfully submitted	Submission Sent Successfully message will display. 	Submission was not successful	Error message will display. Try again, if error message displays, contact one of the registry administrators listed at the end of these directions.
IF...	THEN...						
Successfully submitted	Submission Sent Successfully message will display. 						
Submission was not successful	Error message will display. Try again, if error message displays, contact one of the registry administrators listed at the end of these directions.						

You will be notified by email when your account has been approved. Once your account has been approved you may return to the registry and logon.

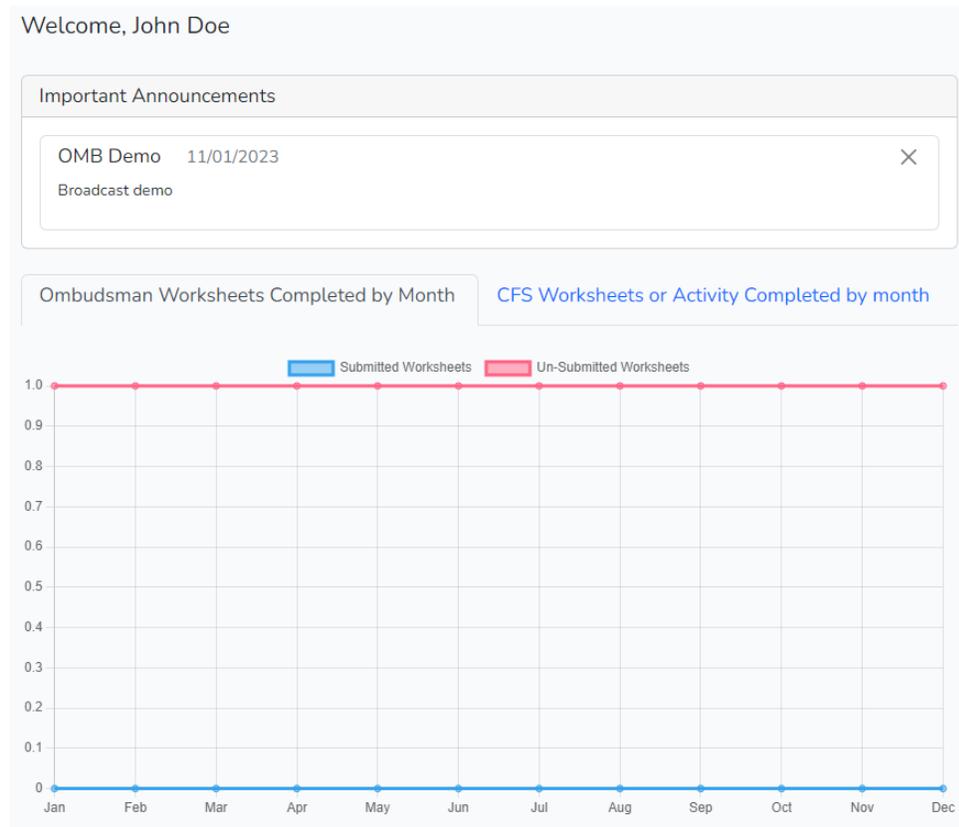
Note: During the login process, you will receive a 2 Factor Authentication code to the email address you registered. If you do not receive notification within 5 minutes, please try again.

## 1.4 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) Ombudsman Coordinators, Area Regional Ombudsman Coordinators, Ombudsman Program Manager, Personal Financial Manager, and PFMP Program Manager.

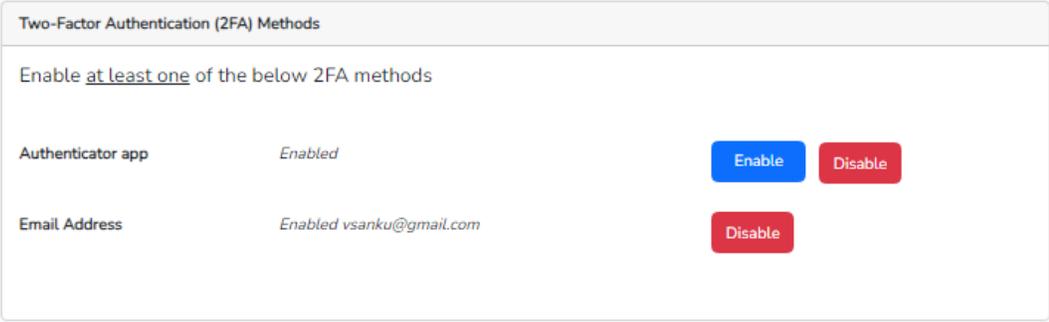
The Dashboard also shows both Ombudsman and CFS worksheets summary by month. Clicking on the chart for a particular month shows the units list for that month.



## 1.5 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 <b>2FA Settings</b> option shown below.</p> <p>Dashboard   Units   Support   Reports ▾   <b>John Doe ▾</b></p> <ul style="list-style-type: none"><li>john.doe@uscg.mil</li><li>2FA Settings</li><li>User Profile</li><li>Logout</li></ul>

2	<p>You can Enable or Disable a particular 2FA method by clicking the <b>Enable</b> and <b>Disable</b> buttons.</p> 
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## 1.6 Update Your Profile

To update your name, phone, address:

Step	Action
1	<p>Click on your name in the menu bar and click on <b>User Profile</b> option.</p> 
2	Change or enter your information.

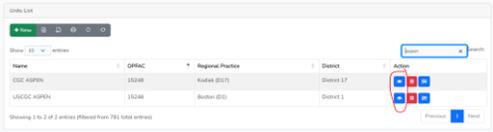
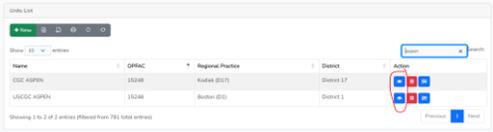
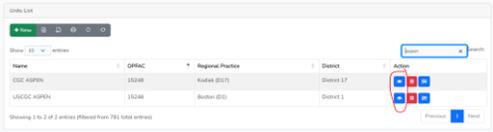
	<div style="border: 1px solid #ccc; padding: 10px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>John Doe</span> <span><a href="#">Login as this user</a></span> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Last Name <input type="text" value="Doe"/></p> <p>First Name <input type="text" value="John"/></p> <p>Email <input type="text" value="john.doe@uscg.mil"/></p> <p>Secondary Email <input type="text"/></p> <p>phone <input type="text"/></p> <p>Alt. Phone <input type="text"/></p> </div> <div style="width: 45%;"> <p>Address <input type="text"/></p> <p>Address 2 <input type="text"/></p> <p>City or Town <input type="text"/></p> <p>State or Province <input type="text"/></p> <p>Country <input type="text"/></p> <p>Zip or Post Code <input type="text"/></p> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <span style="background-color: #007bff; color: white; padding: 5px 10px; border-radius: 4px;">Submit</span> <span style="background-color: #6c757d; color: white; padding: 5px 10px; border-radius: 4px;">Cancel</span> </div> </div>
3	Click <b>Submit</b> .

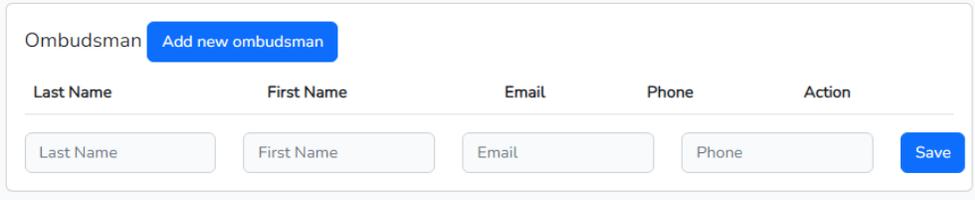
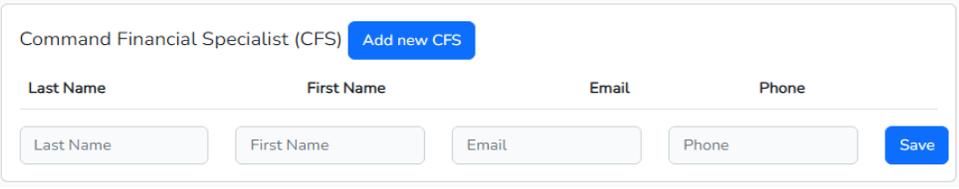
### 1.7 Assigning Ombudsmen or Command Financial Specialist (CFS) to a Unit

Commanding officer, Officer-in-Charge, or Command Designee registers and assigns their Ombudsman or CFS to their unit(s) per COMDTNST 1750.4 (series).

Registering Ombudsmen/CFS at the completion of CG Ombudsman/CFS training is one way to ensure Ombudsmen/CFS are assigned to their unit. Commanders can only assign Ombudsmen/CFS who are assigned to a unit located in their AOR.

To assign an Ombudsman/CFS:

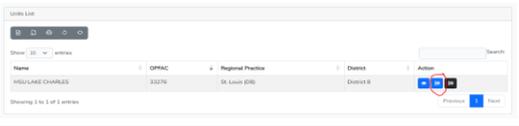
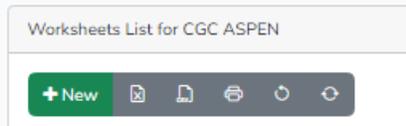
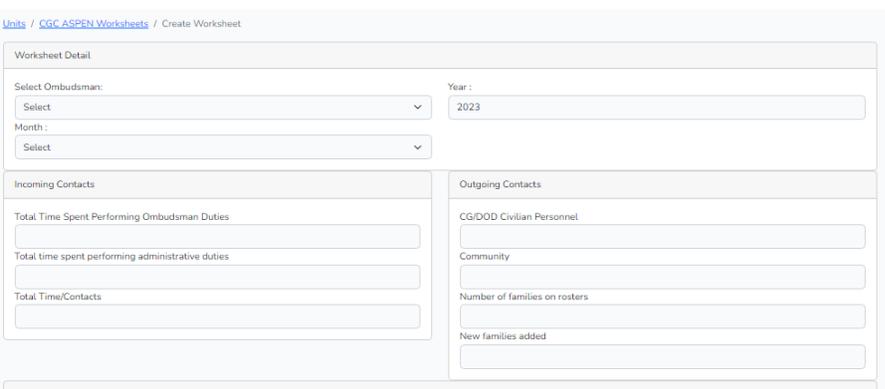
Step	Action						
1	Click on Units menu item.						
2	<table border="1" style="width: 100%;"> <tr> <th style="width: 50%;">IF...</th> <th style="width: 50%;">THEN...</th> </tr> <tr> <td>Unit is in your unit list</td> <td>           From the list, click on the Edit units link of the appropriate unit row.            </td> </tr> <tr> <td>Unit is not in your unit list</td> <td>The list will go blank. Click Units and the list will repopulate. Contact Coordinator or Program Manger to get the Unit added to the registry.</td> </tr> </table>	IF...	THEN...	Unit is in your unit list	From the list, click on the Edit units link of the appropriate unit row. 	Unit is not in your unit list	The list will go blank. Click Units and the list will repopulate. Contact Coordinator or Program Manger to get the Unit added to the registry.
IF...	THEN...						
Unit is in your unit list	From the list, click on the Edit units link of the appropriate unit row. 						
Unit is not in your unit list	The list will go blank. Click Units and the list will repopulate. Contact Coordinator or Program Manger to get the Unit added to the registry.						

	<b>NOTE:</b> Unit name may be listed under different names, i.e., D11 may be Eleventh District.						
3	To add Ombudsman, click the Add New Ombudsman button in the middle of the Unit details screen. This will open a new Ombudsman row. 						
4	To add CFS, click the Add New CFS button in the middle of the Unit details screen. This will open a new CFS row. 						
5	Enter last name of the Ombudsman/CFS. <table border="1" data-bbox="381 903 1421 1407"> <thead> <tr> <th>IF...</th> <th>THEN...</th> </tr> </thead> <tbody> <tr> <td>Name appears</td> <td>Double-click on the name to auto populate first name, email address, and phone number if listed.</td> </tr> <tr> <td>Name does not appear</td> <td>Manually enter required information (i.e., last name, first name, email address, and phone number).  The system will send an email to the Ombudsman/CFS indicating that they are registered. Please note that the email may be in their junk email folder. The email will contain link to verify email and reset their password.</td> </tr> </tbody> </table>	IF...	THEN...	Name appears	Double-click on the name to auto populate first name, email address, and phone number if listed.	Name does not appear	Manually enter required information (i.e., last name, first name, email address, and phone number).  The system will send an email to the Ombudsman/CFS indicating that they are registered. Please note that the email may be in their junk email folder. The email will contain link to verify email and reset their password.
IF...	THEN...						
Name appears	Double-click on the name to auto populate first name, email address, and phone number if listed.						
Name does not appear	Manually enter required information (i.e., last name, first name, email address, and phone number).  The system will send an email to the Ombudsman/CFS indicating that they are registered. Please note that the email may be in their junk email folder. The email will contain link to verify email and reset their password.						
6	Click the <b>Save</b> icon.						

### 1.8 Fill Ombudsman Worksheet

A Commander can fill a worksheet on behalf of an Ombudsman. To fill a worksheet on behalf on an Ombudsman:

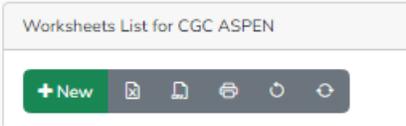
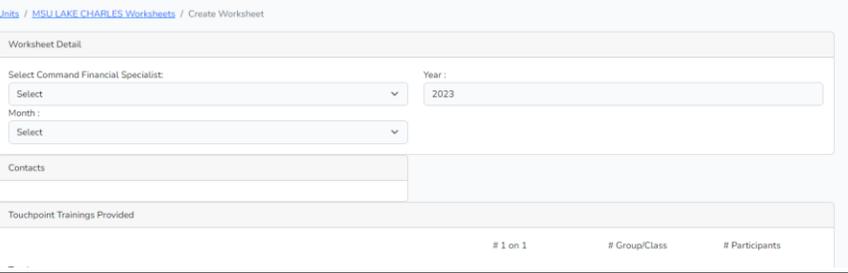
Step	Action				
1	Click on Units menu item.				
2	In the Search box, enter the unit name or the last 5 digits of the OPFAC <table border="1" data-bbox="381 1774 1421 1890"> <thead> <tr> <th>IF...</th> <th>THEN...</th> </tr> </thead> <tbody> <tr> <td>Unit is in your unit list</td> <td>From the list, click on the Ombudsman Worksheets link of the appropriate unit row.</td> </tr> </tbody> </table>	IF...	THEN...	Unit is in your unit list	From the list, click on the Ombudsman Worksheets link of the appropriate unit row.
IF...	THEN...				
Unit is in your unit list	From the list, click on the Ombudsman Worksheets link of the appropriate unit row.				

		
	Unit is not in your unit list	The list will go blank. Click Units and the list will repopulate. Contact Coordinator or Program Manger to get the Unit added to the registry.
<b>NOTE:</b> Unit name may be listed under different names, i.e., D11 may be Eleventh District.		
3	Click the New link on the worksheets page.	
		
4	Select the Ombudsman name, on behalf of whom the worksheet is getting filled, from the Select Ombudsman list.	
		
5	Fill the worksheet details.	
6	Click the <b>Submit as Final</b> button.	

## 1.9 Fill Command Financial Specialist (CFS) Worksheet

A Commander can fill a worksheet on behalf of a CFS. To fill a worksheet on behalf on a CFS:

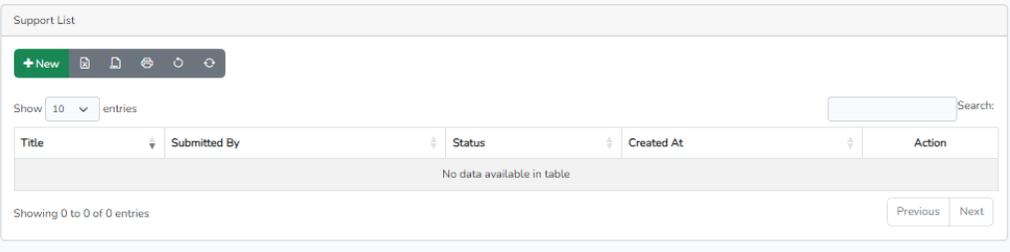
Step	Action	
1	Click on Units menu item.	
2	In the Search box, enter the unit name or the last 5 digits of the OPFAC	
	IF...	THEN...
	Unit is in your unit list	From the list, click on the PFMP Worksheets link of the appropriate unit row.
		

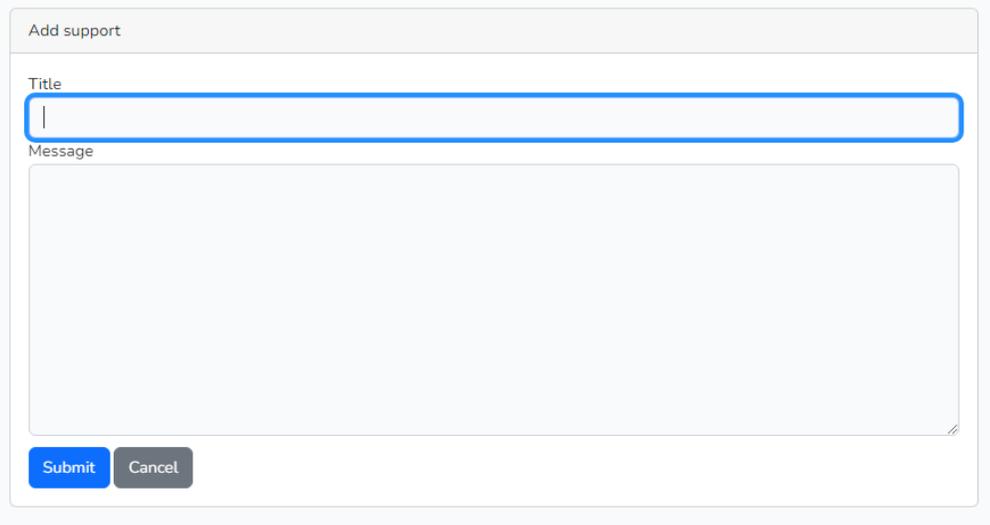
	Unit is not in your unit list	The list will go blank. Click Units and the list will repopulate. Contact PFM or Program Manger to get the Unit added to the registry.
	<b>NOTE:</b> Unit name may be listed under different names, i.e., D11 may be Eleventh District.	
3	Click the New link on the worksheets page.	
		
4	Select the CFS name, on behalf of whom the worksheet is getting filled, from the Select Command Financial Specialist list.	
		
5	Fill the worksheet details.	
6	Click the <b>Submit as Final</b> button.	

## 1.10 New Support Request

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

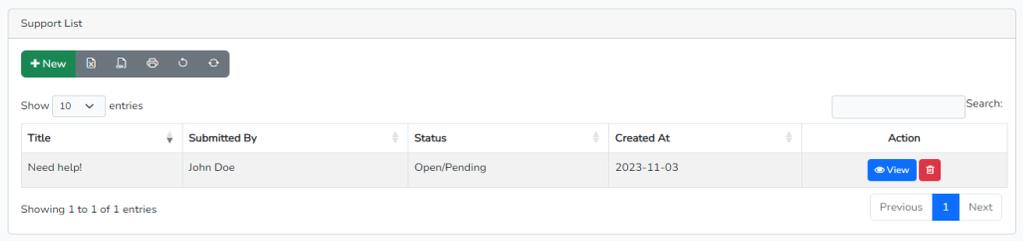
To submit a support case request:

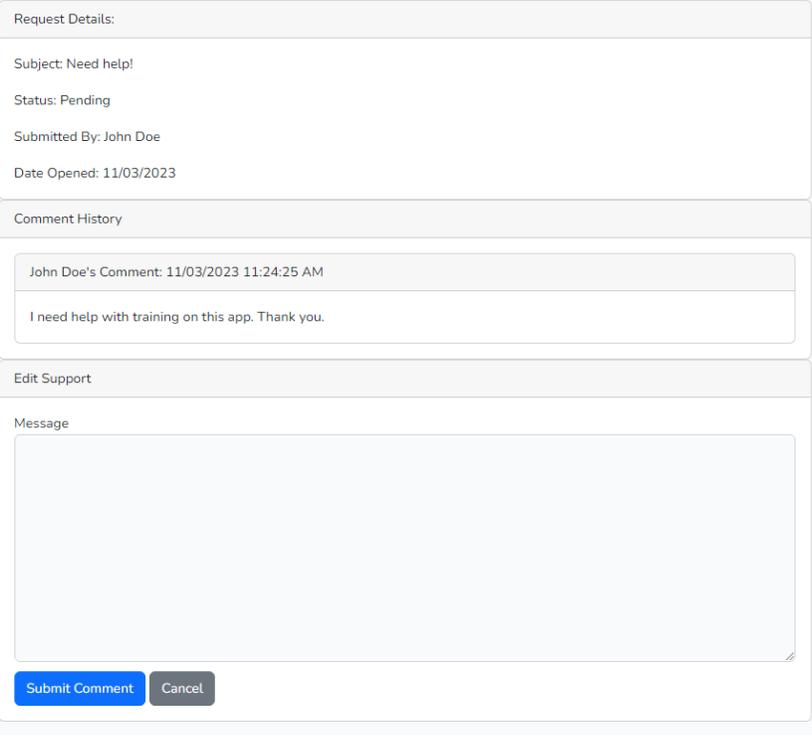
Step	Action
1	Click <b>Support</b> from the top menu bar.
	
2	Click <b>New</b> .
	

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	Click <b>Submit</b> .

### 1.11 Add Comment to Support Request

To add a comment to an existing support case request:

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

	
4	Click <b>Submit Comment</b> .

## 1.12 Count Reports

Every Commander has the capability to monitor the commands that are assigned to their area of responsibility by going to the reports tab located on your dashboard.

These reports provide the Units, Ombudsmen, Commanders, Coordinators, Personal Financial Managers, and Command Financial Specialists counts for their AOR. Click on the particular report link to see the listing. Each listing can be downloaded into an Excel spreadsheet. When exporting an Excel spreadsheet, all columns will be exported. Unwanted columns can be deleted after download.

Reports

Quick List  
MSU LAKE CHARLES

Type	Count
<a href="#">Commands</a>	1
<a href="#">Commands No Ombudsman report</a>	1
<a href="#">Regional Practice Coordinator</a>	0
<a href="#">Regional Coordinator</a>	0
<a href="#">Total Ombudsmen</a>	0
<a href="#">Total Ombudsmen Assigned</a>	0
<a href="#">Total Ombudsmen Not Assigned To A Command</a>	0
<a href="#">Total Commanders</a>	1
<a href="#">Total Commanders Not Assigned To A Command</a>	0

Reports

Quick List  
MSU LAKE CHARLES

Type	Count
<a href="#">Commands</a>	1
<a href="#">Commands No CFS report</a>	1
<a href="#">Personal Financial Manager</a>	0
<a href="#">Total CFS</a>	0
<a href="#">Total CFS Assigned</a>	0
<a href="#">Total CFS Not Assigned To A Command</a>	0
<a href="#">Total Commanders</a>	1
<a href="#">Total Commanders Not Assigned To A Command</a>	0

### 1.13 Worksheet Statistics

Every Commander has the capability to monitor the Worksheet Statistics for their area of responsibility by going to the reports tab located on your dashboard.

Worksheet Statistics report shows the worksheet totals that your Ombudsmen or Command Financial Specialists (CFS) have submitted for any given period of time. The totals will be for the current calendar year. To review numbers for a previous calendar year, use the date range feature to specify the desired report period. You can also use the date range feature to select a specific period in the current calendar year as well. Here you can request a report for a specific date range and can monitor the number of inquiries and different types of categories that are being reported. This will assist leadership in understanding the current needs of their command family members.

1. If the command has more than one Ombudsman or CFS assigned, the system will take care of combing all worksheets together while showing the total statistics.

2. If an Ombudsman or CFS is assigned to more than one unit, they must complete an Ombudsman/CFS Monthly Worksheet for each command that they are assigned. For example, Command A and Command B have agreed to share Command A Ombudsman/CFS. Command B must be registered and the Ombudsman/CFS assigned to their command in order for him/her to complete a monthly worksheet for that command. If commands decide to combine the worksheets into one worksheet, then the other command worksheets still need to be completed; however, only a zero needs to be entered into the worksheet.

Ombudsman Worksheet Reports

Unit OPFAC:  Quick List:

From:  To:

---

Incoming Contacts		Outgoing Contacts	
Total Time Spent Performing Ombudsman Duties	<input type="text" value="0"/>	CG/DOD Civilian Personnel	<input type="text" value="61"/>
Total time spent performing administrative duties	<input type="text" value="0"/>	Community	<input type="text" value="50"/>
Total Time/Contacts	<input type="text" value="0"/>	Number of families on rosters	<input type="text" value="0"/>
Total	<input type="text" value="12680"/>	New families added	<input type="text" value="0"/>
		Total	<input type="text" value="1204"/>

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Type of I&Rs			
	Total I&Rs Provided	Time Spent	
Childcare	<input type="text" value="7"/>	<input type="text" value="240h"/>	
Deployment	<input type="text" value="5"/>	<input type="text" value="160h"/>	
Total	<input type="text" value="0"/>	<input type="text" value="0"/>	

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Other		
	Total I&Rs Provided	Time Spent
HSWL/Coast Guard	<input type="text" value="0"/>	<input type="text" value="0"/>
Number of Newsletters	<input type="text" value="0"/>	<input type="text" value="0"/>
Number of Meetings Attended	<input type="text" value="0"/>	<input type="text" value="0"/>
Number of Presentations Given	<input type="text" value="0"/>	<input type="text" value="0"/>
Number of Trainings Attended	<input type="text" value="0"/>	<input type="text" value="0"/>
Number of CoP Meetings Attended	<input type="text" value="0"/>	<input type="text" value="0"/>
Number of Outreach Events	<input type="text" value="0"/>	<input type="text" value="0"/>
Contact with PACAREA ROC	<input type="text" value="0"/>	<input type="text" value="0"/>
Total	<input type="text" value="0"/>	<input type="text" value="0"/>

CFS Worksheet Reports

Quick List

Select ▼

From:

01/01/2023 📅

To:

11/21/2023 📅

[Generate Report](#)

Contacts

Touchpoint Trainings Provided

	# 1 on 1	# Group/Class	# Participants
Total	<input type="text"/>	<input type="text"/>	<input type="text"/>

Training and Education with Members (Not including Touchpoint Training)

	# 1 on 1	# Group/Class	# Participants
Total	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

	# Sessions Provided	# Participants
Total	<input type="text"/>	<input type="text"/>