U.S. COAST GUARD

Ombudsman & Personal Financial Management Program

Registry User Guide for Coordinators
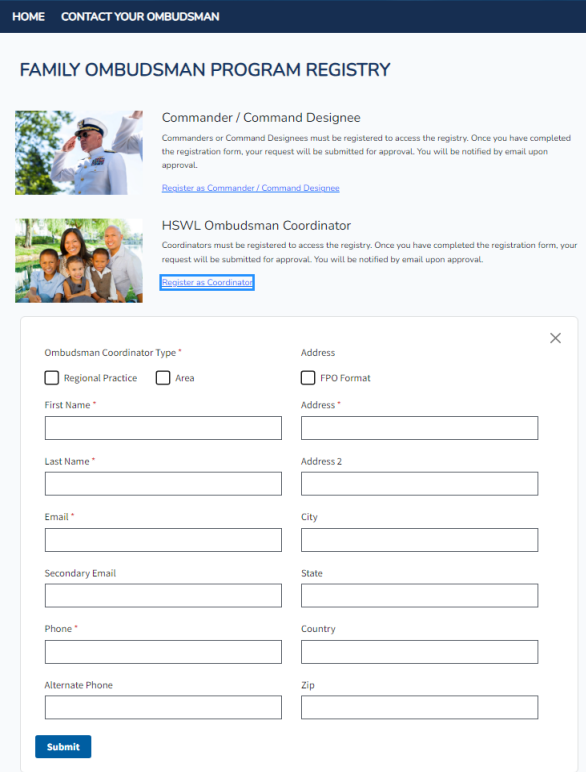
Contents

This user guide provides basic procedures to Ombudsman Coordinators on using the CG Ombudsman Registry. These procedures include registering users, adding units, assigning Ombudsman and Commanding officers to units within the registry, sending broadcasts, and running reports.
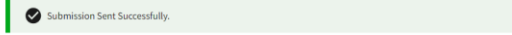
1.1 Ombudsman Registration

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 Coordinator Registration

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

Step	Action
1	Under 'Family Ombudsman Program Registry' section, click on 'Register as Coordinator' link.
2	Select appropriate checkbox for Regional Practice or Area Coordinator.
3	From the Regional Practice/Area drop down menu, select your Regional Practice/Region.
4	Enter requested information (e.g., last name, first name, email, etc.) in the corresponding box.

| 5	Click **Submit**.	
	IF…	THEN…
	Successfully submitted	Submission Sent Successfully message will display. ✔ Submission Sent Successfully.
	Submission was not successful	Error message will display. Try again, if error message displays or contact one of the registry administrators.

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.

1.3 Dashboard

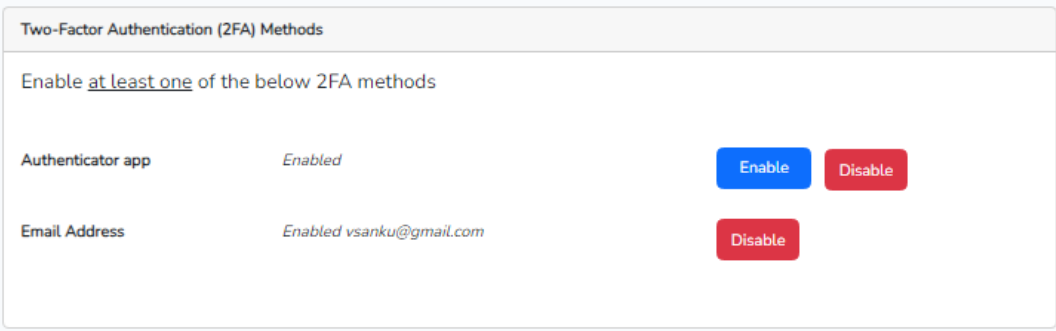When you login to the registry, Dashboard is the landing page.

The Dashboard shows any Announcements posted by: Health, Safety and Work-Life Regional Practice (HSWL RP) Ombudsman Coordinators, Area Regional Ombudsman Coordinators and Ombudsman 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.
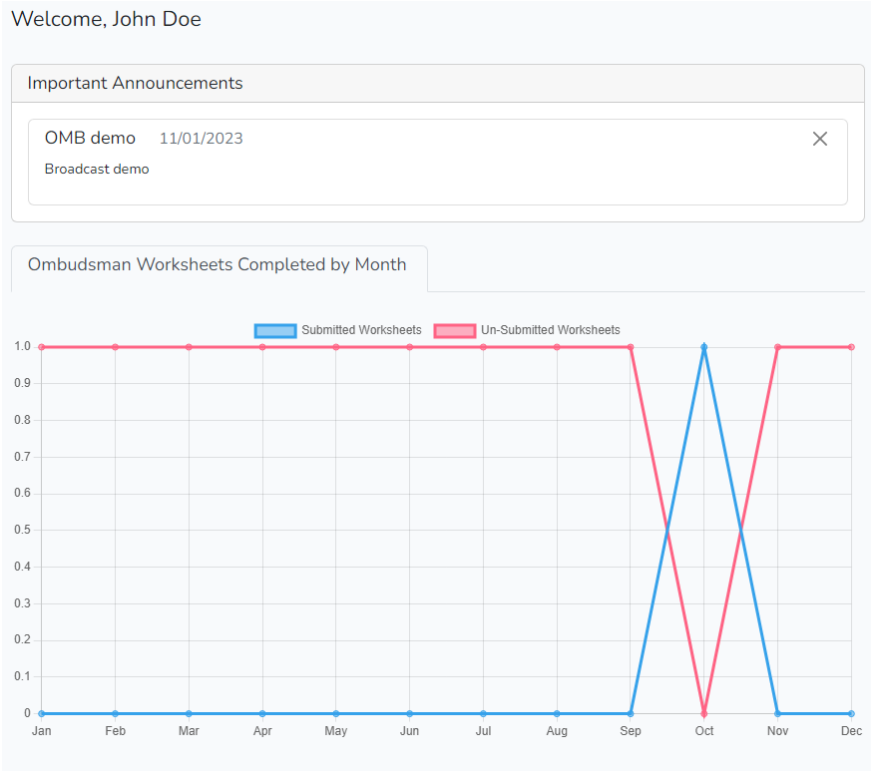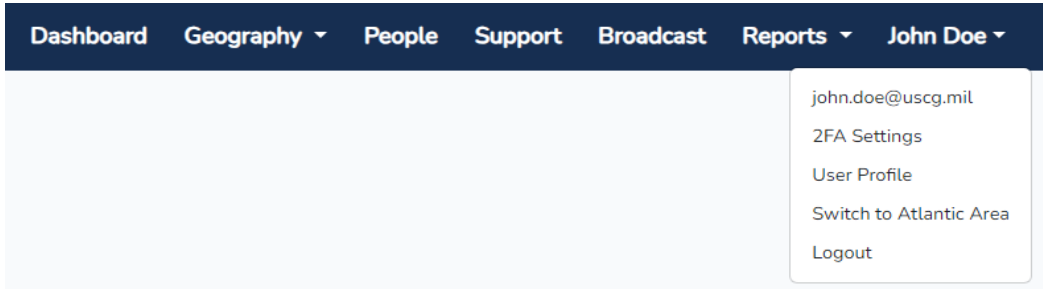
1.4 Updating Two-Factor Authentication (2FA) Method

To reset 2FA authentication method:

Step	Action
1	Click on your name in the menu bar and click on **2FA Settings** option shown below. Dashboard Geography ▾ People Support Broadcast Reports ▾ John Doe ▾ john.doe@uscg.mil 2FA Settings User Profile Switch to Atlantic Area Logout
2	You can Enable or Disable a particular 2FA method by clicking the **Enable** and **Disable** buttons. 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

1.5 Update Your Profile
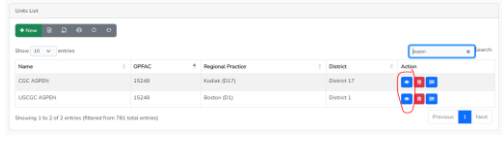
To update your name, phone, address:

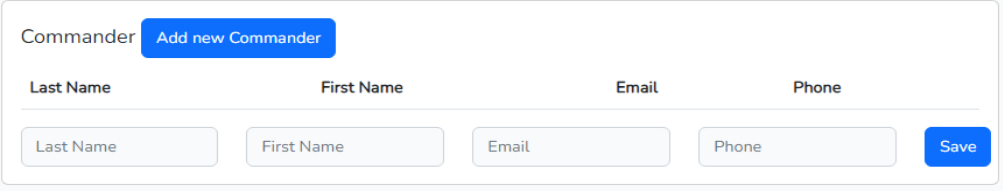| Step	Action
1	Click on your name in the menu bar and click on **User Profile** option. Dashboard Geography ▾ People Support Broadcast Reports ▾ John Doe ▾ john.doe@uscg.mil 2FA Settings User Profile Switch to Atlantic Area Logout
2	Change or enter your information.

| 3 | Click **Submit**. |

1.6 Assignment of Commanding Officer, Officer-in-Charge, or Command Designee

You may be asked to assist with assignment of the Commanding Officers, Officers-in-Charge, or Command Designees.

Step	Action
1	Click on Geography drop down menu and then click 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 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. Go to the next section of this guide and complete steps for **Adding a Unit**. | **NOTE**: Unit name may be listed under different names, i.e., D11 may be Eleventh District.
3	Click the Add New Commander button at the bottom of the Unit details screen. This will open a new Commander row.

4	Enter last name of the CO, OIC, or designee.

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 Commanding officer, Officer-in-Charge, or Command Designee 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.

5	Click the **Save** icon.

1.7   Adding a Unit

If the Unit is not listed in the registry after you have searched, add the unit by:

Step	Action
1	Click on Geography drop down menu and then click Units menu item.
2	Click on New icon under Units list

3	Complete the unit information.
	Add Units Type Select Type ⌄ Unit Name OPFAC Regional Practice Select Regional Practice ⌄ ☐ Deployable ☐ Non Deployable ☐ Reserve Units ☐ OCONUS ☐ FPO Format Address Address 2 City or Town State or Province Country Zip or Postcode **Create Unit** Cancel
5	Click the **Save** icon.

The unit will be verified and approved by the Ombudsman Program Manager. Approvals are normally processed within 24 to 48 hours of your request. After receiving approval, you can return to the registry and make your assignments.
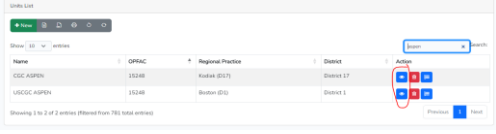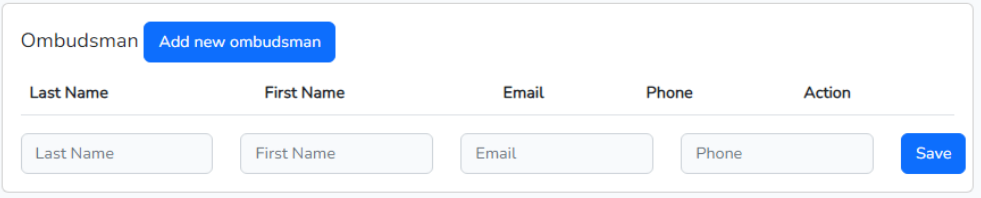
1.8   Assigning Ombudsmen to a Unit

While it is the responsibility of the Commanding officer, Officer-in-Charge, or Command Designee to register and assign their Ombudsman to their unit(s) per COMDTNST 1750.4 (series), there will be times when it is necessary for the Ombudsman Coordinator to make the assignment. This will assist you in maintaining a current Ombudsman roster as required by COMDTNST 1750.4 (series).

Registering Ombudsmen at the completion of CG Ombudsman training is one way to ensure Ombudsmen are assigned to their unit. Coordinators can only assign Ombudsmen who are assigned to a unit located in their AOR. If you have Ombudsmen from another AOR attend your training, forward the Ombudsmen information to the servicing HSWL RP Ombudsman Coordinator, who can enter them into the Ombudsman Registry.

To assign an Ombudsman:

Step	Action
1	Click on Geography drop down menu and then click Units menu item.
2	In the Search box, enter the unit name or the last 5 digits of the OPFAC
	<table><tr><td>IF…</td><td>THEN…</td></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></table>

	Unit is not in your unit list	The list will go blank. Click Units and the list will repopulate. Go to the next section of this guide and complete steps for **Adding a Unit**.
	NOTE: Unit name may be listed under different names, i.e., D11 may be Eleventh District.	
3	Click the Add New Ombudsman button in the middle of the Unit details screen. This will open a new Ombudsman row. 	
4	Enter last name of the Ombudsman.	

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 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.

5	Click the **Save** icon.

1.9 Deleting Personnel from the Registry

Removing a Commanding Officer, Officer-in-Charge, Command Designee, or Ombudsman from their assignment does not delete them from the Ombudsman Registry database. To delete someone from the registry:
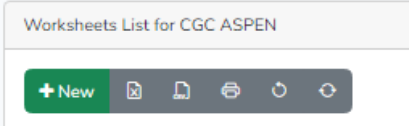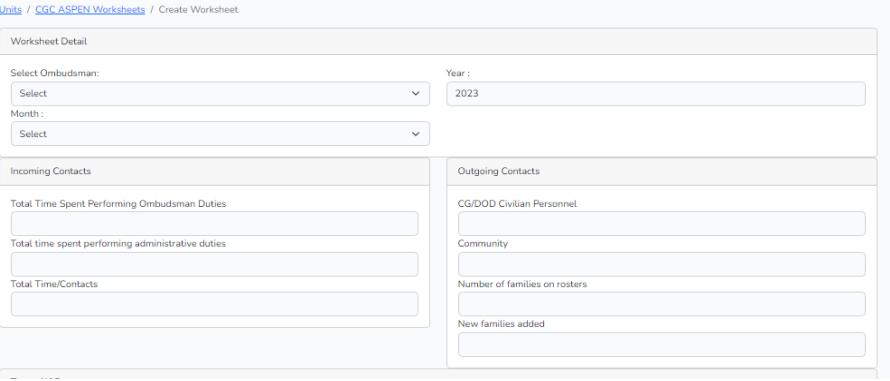
Step	Action
1	Click People from menu.

2	Select either the Commanders or Ombudsman from the drop down menu
3	Enter the name of the Commanding Officer, Officer-in-Charge, Command Designee, or the Ombudsman in the search box. The list displays matching records.
5	Click the **Delete** icon in the appropriate user row. This will open a delete confirmation popup window.
6	Click **OK** on the popup window to confirm delete.

1.10 Fill Worksheet

An Ombudsman Coordinator or Commander can fill a worksheet on behalf of an Ombudsman. To fill a worksheet on behalf on an Ombudsman:
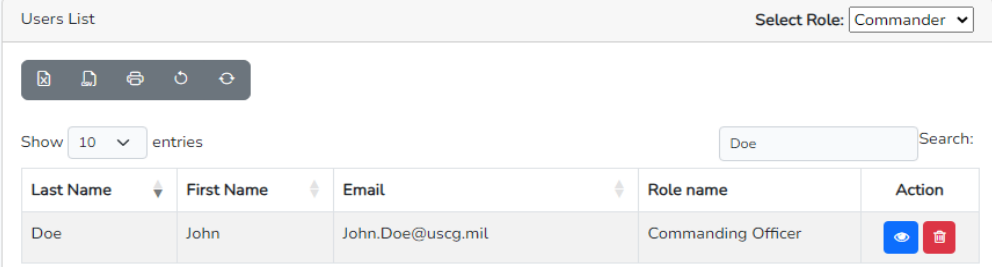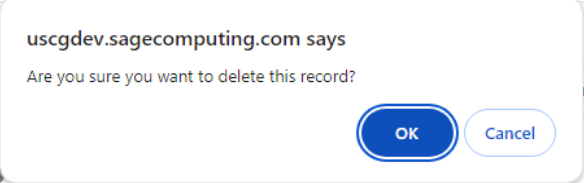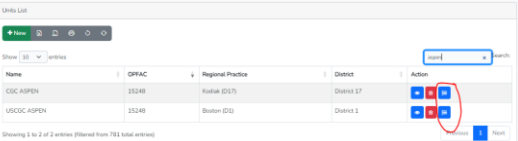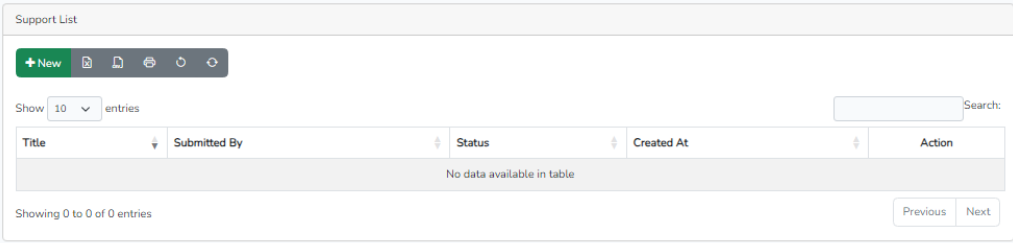
Step	Action
1	Click on Geography drop down menu and then click Units menu item.
2	In the Search box, enter the unit name or the last 5 digits of the OPFAC
		IF…	THEN…	
	|---|---|
		Unit is in your unit list	From the list, click on the Ombudsman Worksheets link of the appropriate unit row.	
		Unit is not in your unit list	The list will go blank. Click Units and the list will repopulate. Go to the next section of this guide and complete steps for **Adding a Unit**.	
	NOTE: Unit name may be listed under different names, i.e., D11 may be Eleventh District.
3	Click the New link on the worksheets page.
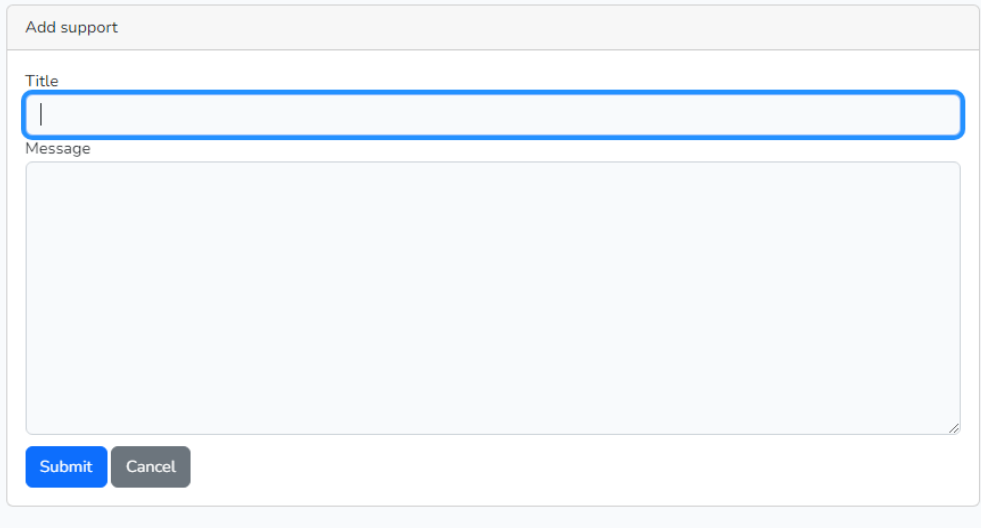
	 Worksheets List for CGC ASPEN **+ New**
4	Select the Ombudsman name, on behalf of whom the worksheet is getting filled, from the Select Ombudsman list.
5	Fill the worksheet details.
6	Click the **Submit as Final** button.

1.11 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 **Support** from the top menu bar. Dashboard Geography ▾ People Support Broadcast Reports ▾ John Doe ▾
2	Click **New**. Support List **+ New** Show 10 ⌄ entries Search: Title Submitted By Status Created At Action No data available in table Showing 0 to 0 of 0 entries Previous Next
3	In the Subject field, enter the subject of the support request. In the Comment field, enter comments or questions that describe the support request.

| 4 | Click **Submit**. |

1.12 Add Comment to Support Request
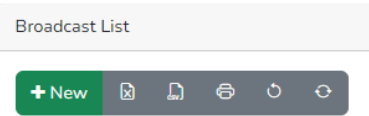
To add a comment to an existing support case request:
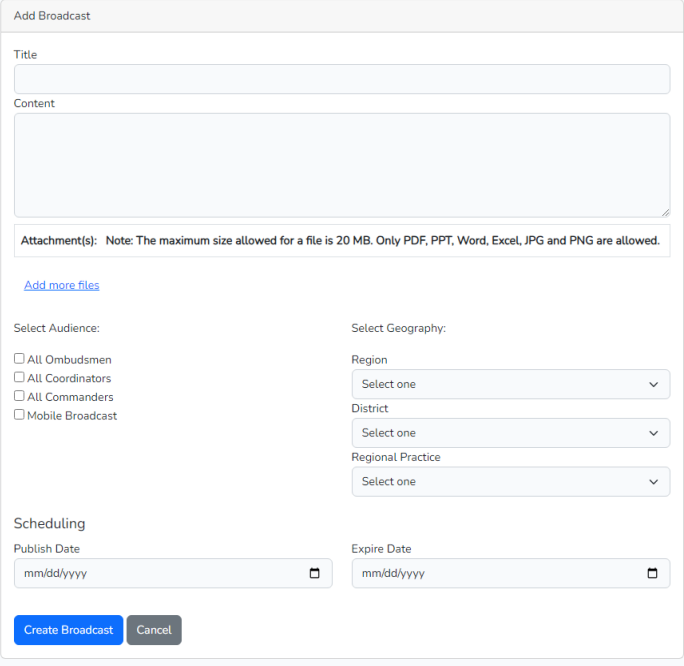
Step	Action
1	Click **Support** from the top menu bar.
2	Click **View** next to the support case row.
3	Add new comment in Message box under Edit Support section.

	Request Details:
	Subject: Need help!
	Status: Pending
	Submitted By: John Doe
	Date Opened: 11/03/2023
	Comment History
	John Doe's Comment: 11/03/2023 11:24:25 AM
	I need help with training on this app. Thank you.
	Edit Support
	Message
	Submit Comment Cancel
4	Click **Submit Comment**.

1.13 Broadcasts

The broadcast system was developed to assist Coordinators in communicating with Commanding Officers/Officers-in-Charge/Command Designees and Ombudsmen that fall within their area of responsibility. With broadcasts you can send real time information and resources about the CG Ombudsman Program to ensure quicker delivery to CG families. The broadcast system does not limit the number of attachments; however, it is recommended that the total attachments do not exceed 20MB. Broadcasts cannot be sent to anyone outside a Coordinator's AOR. Broadcasts are sent by email and will display on registry user's dashboard during the publish and expire dates. Broadcast information that is applicable to all Coast Guard should be forwarded via email to the Program Manager for sending. To create a bulletin:

Step	Action
1	Click Broadcast from menu.
	Dashboard Geography ▾ People Support Broadcast Reports ▾ John Doe ▾
2	Click on the New icon.
	Broadcast List
	+ New
3	In the Title field, enter a title for the bulletin.

5	In the Content field, type your message. NOTE: Be sure to end the message with your name.
6	To add an attachment to your broadcast, click the Add more files link and select the document to attach. NOTE: Repeat as necessary to attach additional documents.
7	From the Select Audience list, select the checkbox/checkboxes that corresponds with the desired broadcast recipients.
8	Select the desired region/district/regional practice from the Select Geography lists.
9	Either manually or using the calendar, select a Publish Date and an Expire Date for the bulletin.
10	Click **Create Broadcast** button.

1.14 Count Reports

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

These reports provide the Units, Ombudsmen, Commanders and Coordinators 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		
Unit OPFAC	**Quick List**	
	All ∨	Search
Type		**Count**
Commands		781
Commands No Ombudsman report		404
Regional Practice Coordinator		22
Regional Coordinator		4
Total Ombudsmen		311
Total Ombudsmen Assigned		309
Total Ombudsmen Not Assigned To A Command		2
Total Commanders		1290
Total Commanders Not Assigned To A Command		29

1.15 Worksheet Statistics

Every HSWL Ombudsman Coordinator 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 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 assigned, the system will take care of combining all worksheets together while showing the total statistics.
2. If an ombudsman is assigned to more than one unit, they must complete an Ombudsman Monthly Worksheet for each command that they are assigned. For example, Command A and Command B have agreed to share Command A Ombudsman. Command B must be registered and the Ombudsman 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:
71109

Quick List:
District 1 ⌄

From:
01/01/2023

To:
11/21/2023

[Generate Report]

Incoming Contacts

Total Time Spent Performing Ombudsman Duties
0

Total time spent performing administrative duties
0

Total Time/Contacts
0

Total
12680

Outgoing Contacts

CG/DOD Civilian Personnel
61

Community
50

Number of families on rosters
0

New families added
0

Total
1204

Type of I&Rs

	Total I&Rs Provided	Time Spent
Childcare	7	240h
Deployment	5	160h

	Total I&Rs Provided	Time Spent
Total	0	0

Other

	Total I&Rs Provided	Time Spent
HSWL/Coast Guard	0	0
Number of Newsletters	0	0
Number of Meetings Attended	0	0
Number of Presentations Given	0	0
Number of Trainings Attended	0	0
Number of CoP Meetings Attended	0	0
Number of Outreach Events	0	0
Contact with PACAREA ROC	0	0
Total	0	0