U.S. COAST GUARD

Ombudsman & Personal Financial Management Program

Registry User Guide for Ombudsmen

Contents

This user guide provides the procedures for an Ombudsman required for using the USCG Ombudsmen Registry. For the purposes of this guide, the term Commander refers to all Command Designees in the registry.

1.1 Ombudsman Registration

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

•The Commanding Officer/Officer-in-Charge/Command Designees

•Health, Safety and Work-Life Regional Practice (HSWL RP) Ombudsman Coordinators

•Area Regional Ombudsman Coordinators

•Ombudsman Program Manager

1.2 Ombudsman Login

Once you have been registered by your representative, you will receive an automatically generated USCG Ombudsman 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 Ombudsman assigned

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

United States Coastal Guard

You have been assigned as a Ombudsman for a USCG unit. You will receive another email to verify your email address and set up a password to access your account.
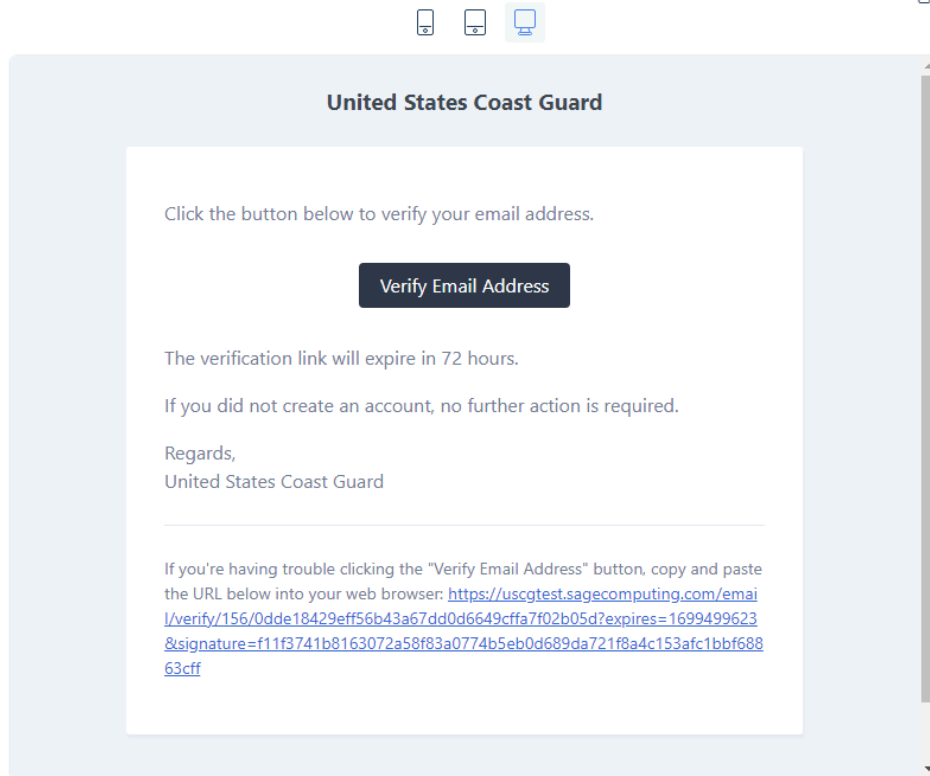
Regards,
United States Coastal Guard

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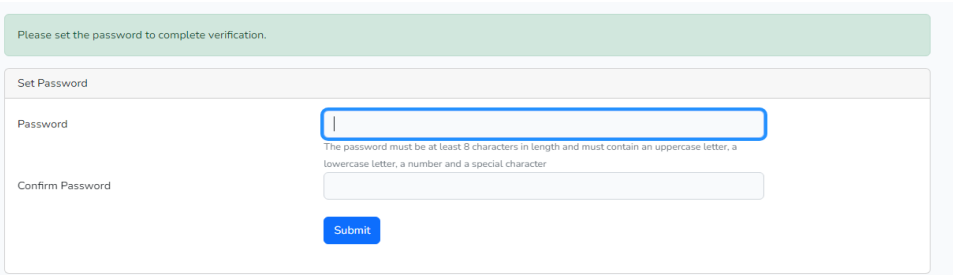
Verify Email Address

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

Show Headers

| HTML | HTML Source | Text | Raw | Spam Analysis | HTML Check | Tech Info |

United States Coast Guard

Click the button below to verify your email address.

Verify Email Address

The verification link will expire in 72 hours.

If you did not create an account, no further action is required.

Regards,
United States Coast Guard

If you're having trouble clicking the "Verify Email Address" button, copy and paste the URL below into your web browser: https://uscgtest.sagecomputing.com/email/verify/156/0dde18429eff56b43a67dd0d6649cffa7f02b05d?expires=1699499623&signature=f11f3741b8163072a58f83a0774b5eb0d689da721f8a4c153afc1bbf68863cff

To login to the Ombudsman Registry, complete the following steps:

Step	Action
1	Click the '**Verify Email Address**' link provided in the Ombudsman Registry email.
2	Set your new password in the email verification screen and click **Submit** Please set the password to complete verification. Set Password Password The password must be at least 8 characters in length and must contain an uppercase letter, a lowercase letter, a number and a special character Confirm Password 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.
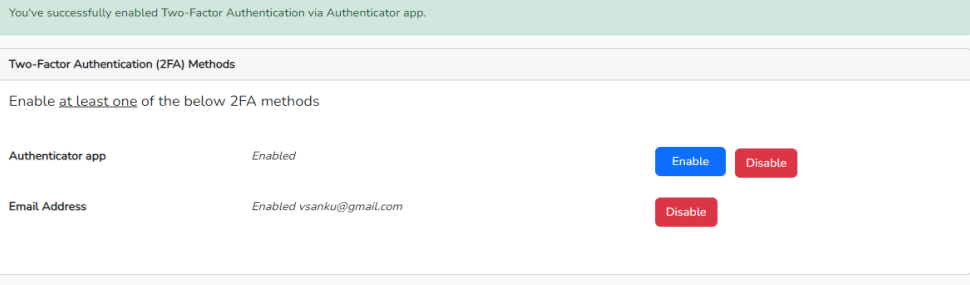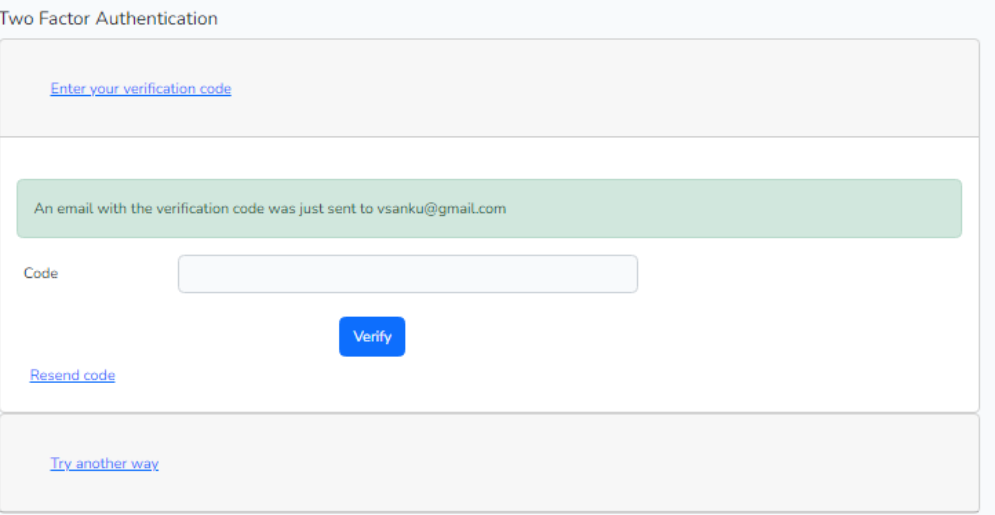
	You've successfully enabled Two-Factor Authentication via Authenticator app. **Two-Factor Authentication (2FA) Methods** Enable <u>at least one</u> of the below 2FA methods **Authenticator app** *Enabled* Enable Disable **Email Address** *Enabled vsanku@gmail.com* Disable
4	From the Registry login screen, 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.
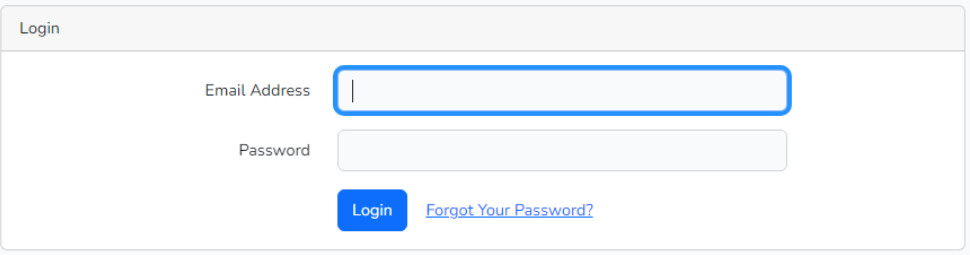
Two Factor Authentication

Enter your verification code

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

Code

Verify

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

Authenticate

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 Send Password Reset Link
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 Close Save changes 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) 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.
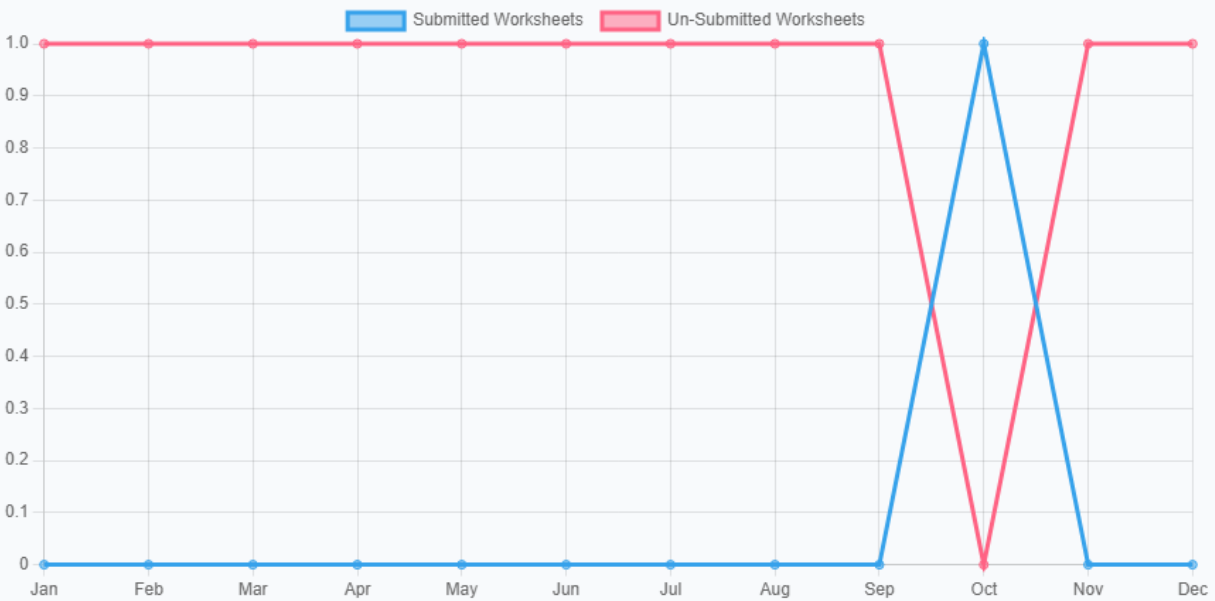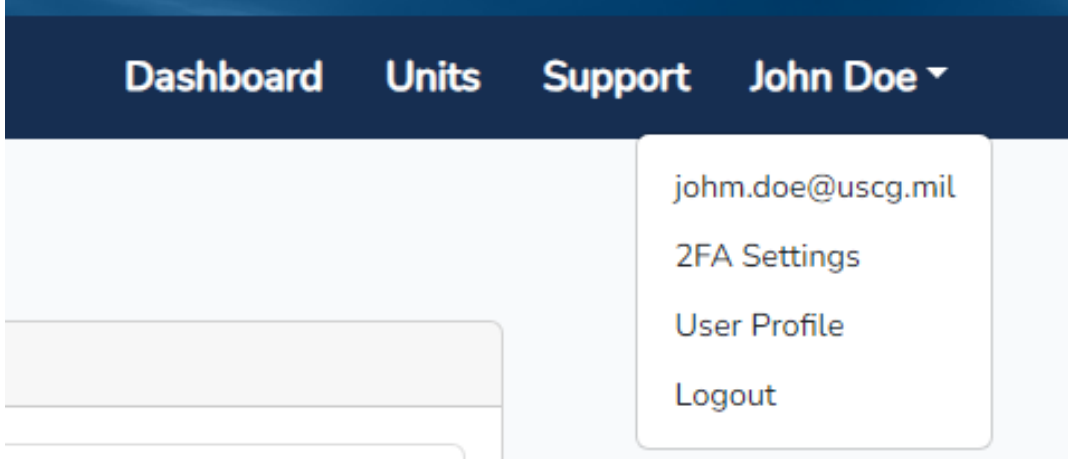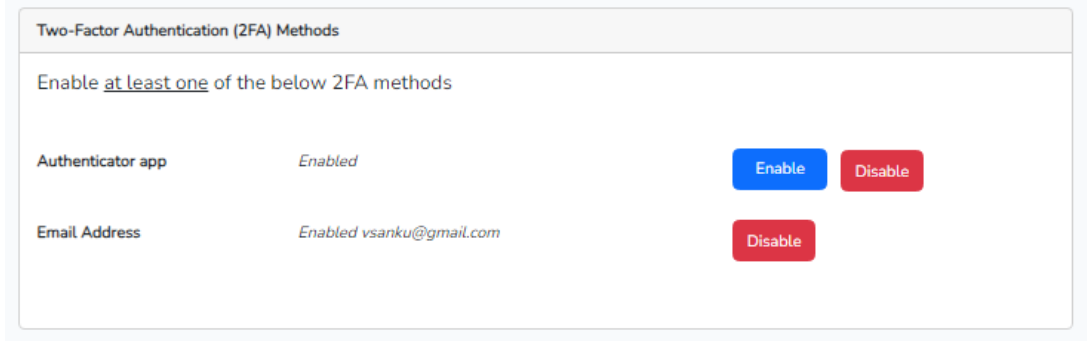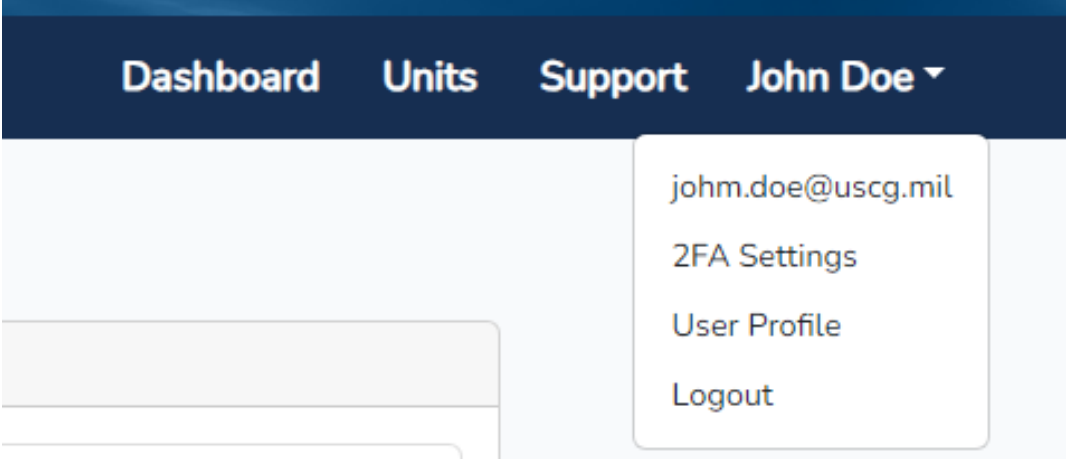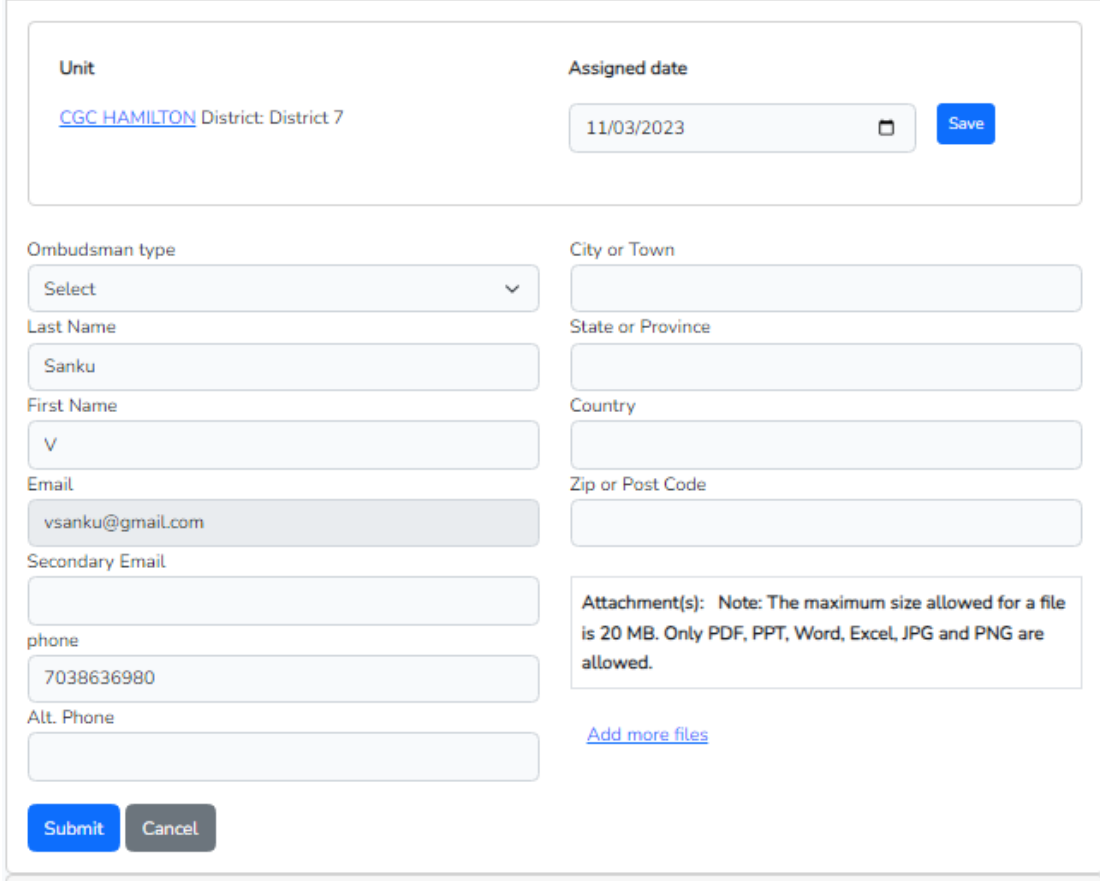
1.4 Updating Two-Factor Authentication (2FA) Method

To reset 2FA authentication method:

Step	Action
1	Click on your name in the menu bar and click on **2FA Settings** option shown below.
2	You can Enable or Disable a particular 2FA method by clicking the **Enable** and **Disable** buttons.
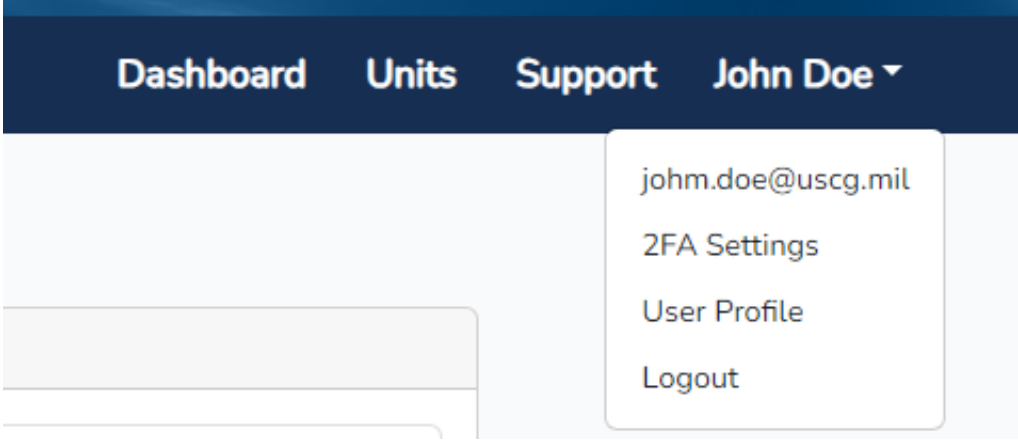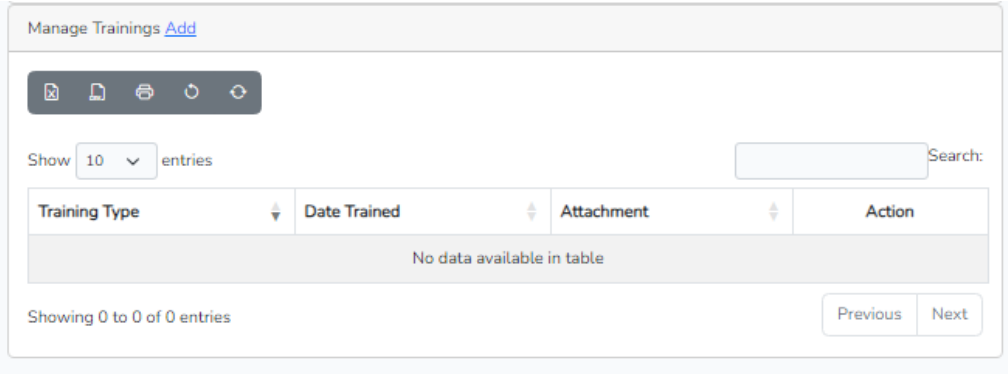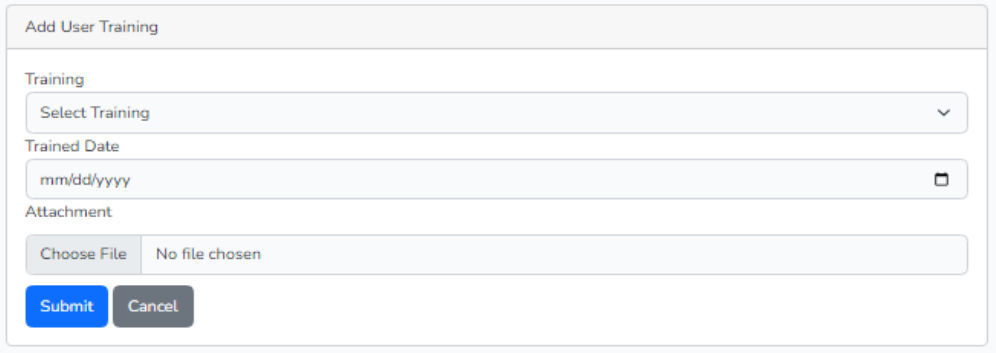
1.5 Update Your Profile

To update your name, phone, address:

Step	Action
1	Click on your name in the menu bar and click on **User Profile** option.
2	Change or enter your information.
3	Click **Submit**.

1.6 Update Trainings

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

Step	Action
1	Click on your name in the menu bar and click on **User Profile** option. The trainings information is at the bottom of the page.
2	Add Training To add any training information the user has completed, click on **Add** link next to Manage Trainings. Enter the Training information. Click **Submit**.

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

Update any details in the training information screen.

Click **Submit**.

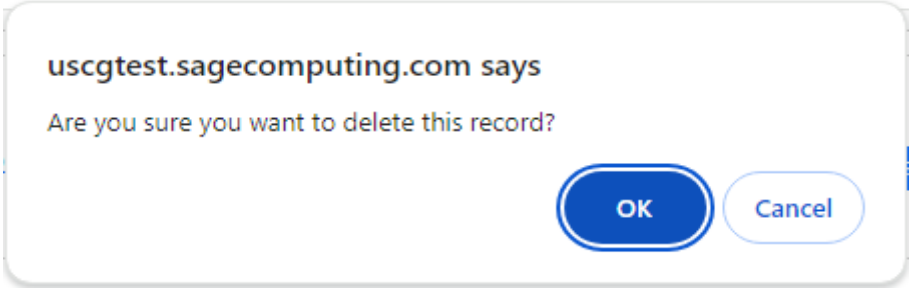| 4	Delete Training
	To delete any existing training information, click on **Delete** button next the particular training.

The system will show a pop-up warning message.

Click **OK** button to confirm the delete.

1.7 Monthly Worksheets

Ombudsmen are required to submit monthly worksheets. Ombudsmen 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 Ombudsman submitting it; therefore, Commanders may direct the Ombudsman 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 Ombudsmen 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 Ombudsmen, each Ombudsman should submit their worksheet independently and the system will combine the worksheets. An Ombudsman assigned to more than one unit, must complete a separate Ombudsman Monthly Worksheet for each command assignment. Even if there is no data for a unit, a worksheet still needs to 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.

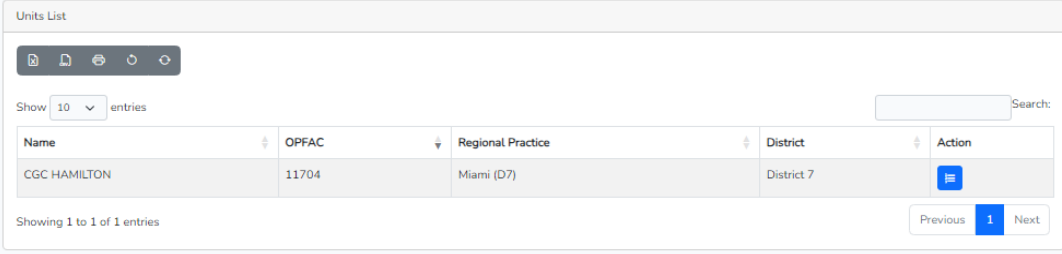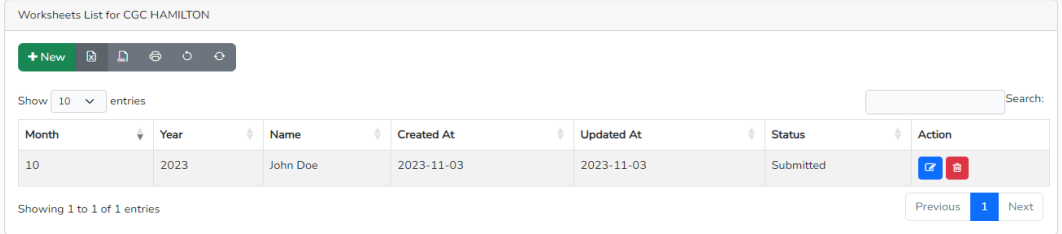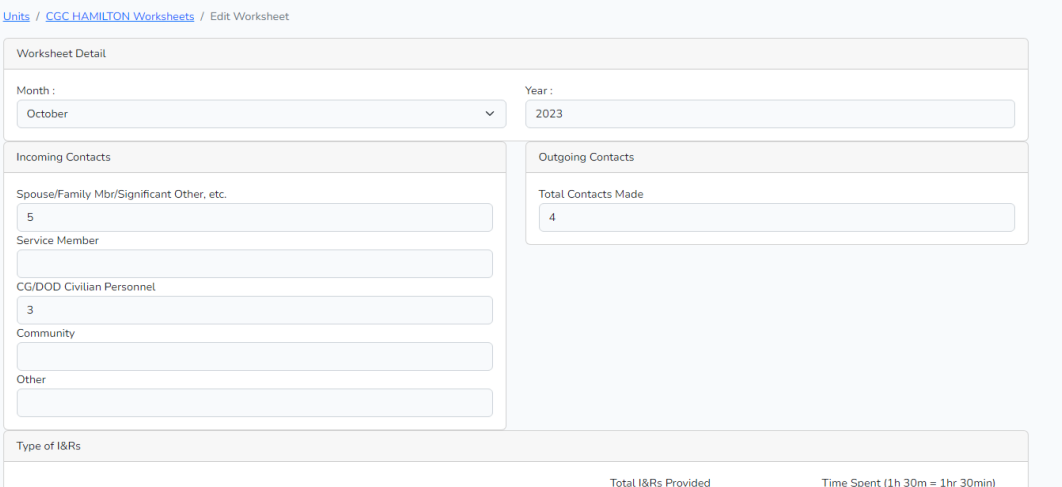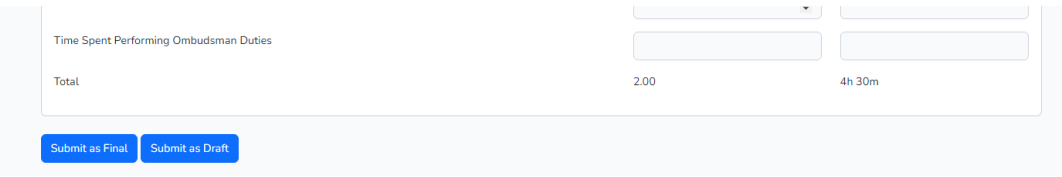|	
	Units List Show 10 entries ⌄ Search: 	Name ⇅	OPFAC ⇅	Regional Practice ⇅	District ⇅	Action
---	---	---	---	---
CGC HAMILTON	11704	Miami (D7)	District 7	☰	 Showing 1 to 1 of 1 entries Previous **1** Next
3	Click **New.** **Worksheets List for CGC HAMILTON** **+ New** Show 10 entries ⌄ Search: | Month ⇅	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 HAMILTON Worksheets / Create Worksheet **Worksheet Detail** Month : Year : [Select ⌄] [2023] **Incoming Contacts** **Outgoing Contacts** Spouse/Family Mbr/Significant Other, etc. Total Contacts Made [ ] [ ] Service Member [ ] CG/DOD Civilian Personnel [ ] Community [ ] Other [ ] **Type of I&Rs** Total I&Rs Provided Time Spent (1h 30m = 1hr 30min)
5	Click **Submit as Final** or **Save as Draft.** Number of Outreach Events [ ] [ ] Time Spent Performing Ombudsman Duties [ ] [ ] Total **Submit as Final** **Submit as Draft**

1.7.2 Review or Edit Worksheet

To review or edit an individual monthly unit worksheet.

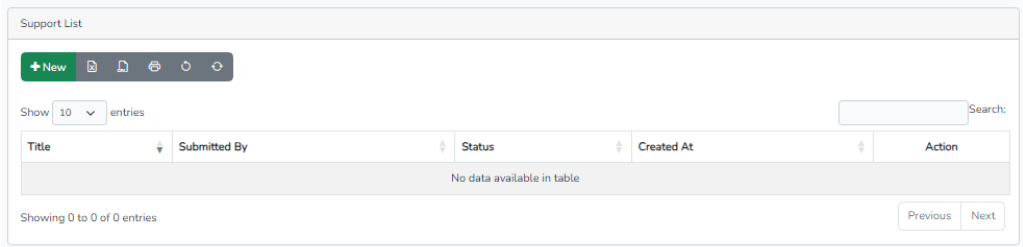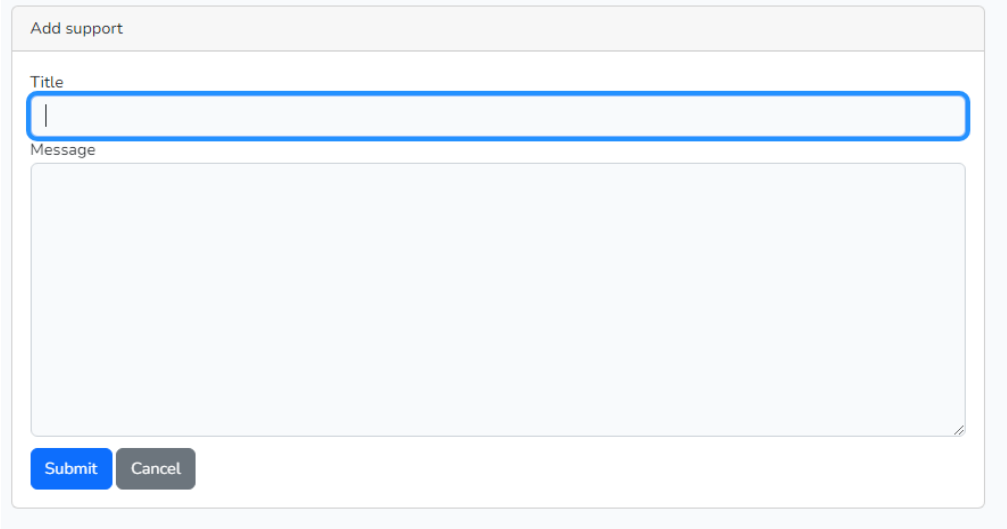| Step	Action
1	Click **Units** from the top menu bar.
2	Click the **View Worksheets** link next to the unit row.
3	Click the **Edit Worksheet** link next to the particular worksheet you want to edit or review.
4	Review or Edit any data you want to update.
5	Click **Submit as Final** or **Save as Draft.**

1.8   Support

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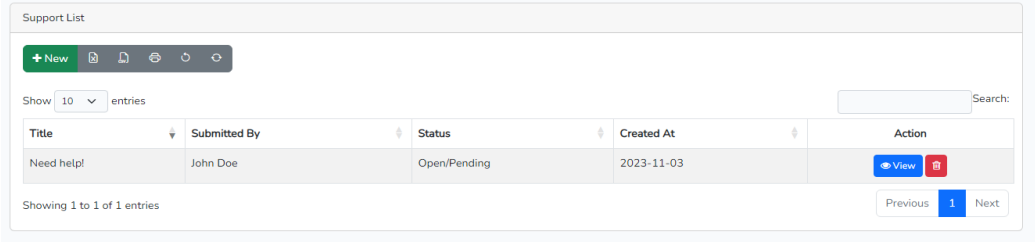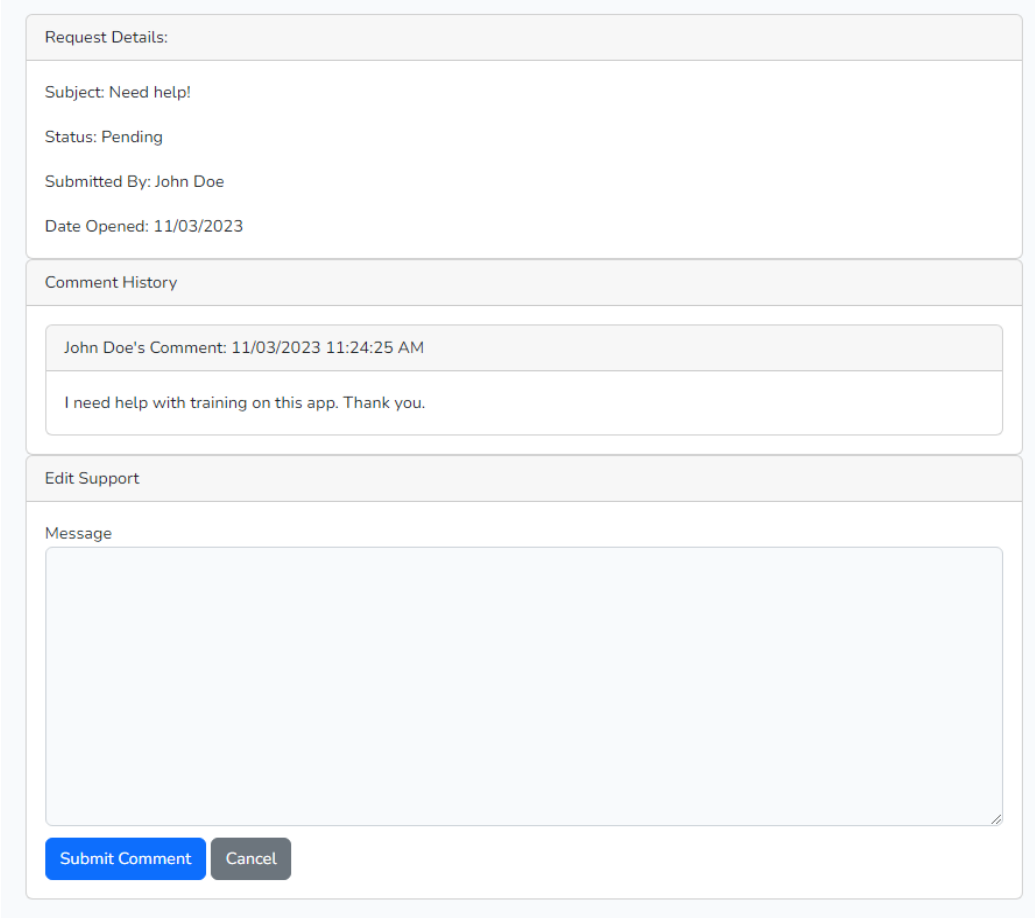
1.8.1   New Support Request

To submit a support case request:

Step	Action
1	Click **Support** from the top menu bar. Ombudsman Dashboard Units Support 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. Add support Title Message Submit Cancel
4	Click **Submit**.

1.8.2 Add Comment to Support Request

Add a comment to an existing support case request:

Step	Action
1	Click **Support** from the top menu bar. Ombudsman Dashboard Units Support John Doe ▾
2	Click **View** next to the support case row. Support List + New Show 10 ▼ entries Search: Title Submitted By Status Created At Action Need help! John Doe Open/Pending 2023-11-03 👁View 🗑 Showing 1 to 1 of 1 entries Previous 1 Next
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**.