U.S. COAST GUARD

Ombudsman & Personal Financial Management Program

Registry User Guide for Personal Financial Managers

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This user guide provides basic procedures to Personal Financial Managers (PFM) on using the CG Personal Financial Management Program (PFMP) Registry. These procedures include registering users, adding units, assigning Command Financial Specialist (CFS) and Commanding officers to units within the registry, sending broadcasts, and running reports.

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

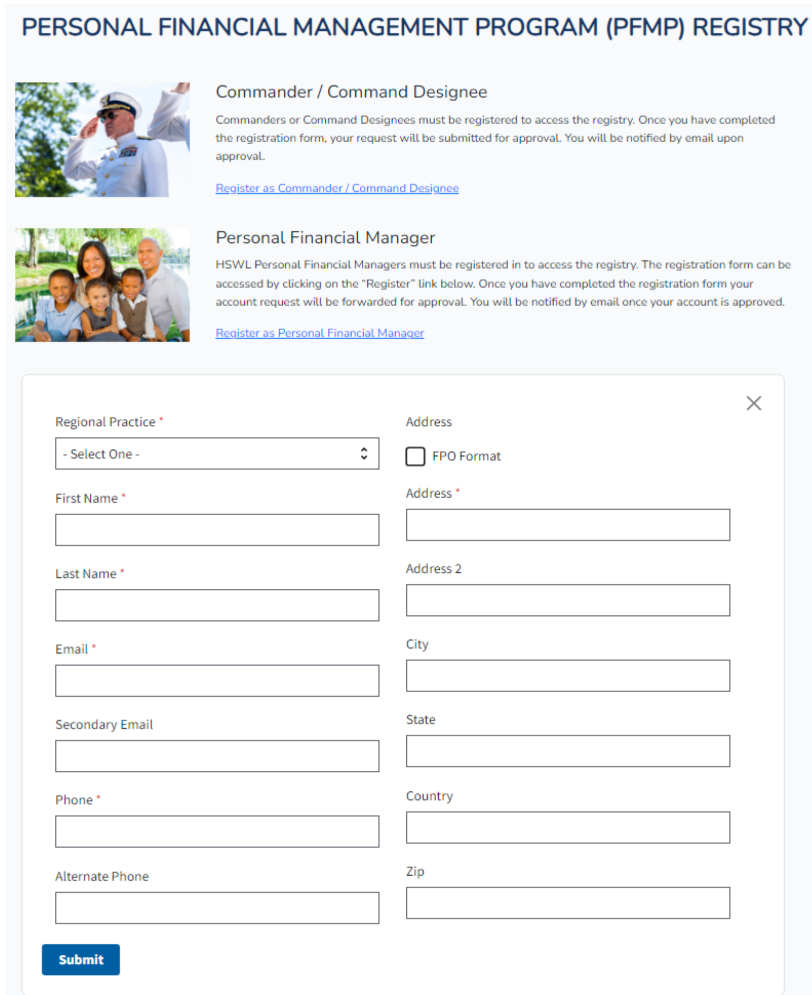
•Health, Safety and Work-Life Regional Practice (HSWL RP) Personal Financial Managers

• Personal Financial Management Registry Program Manager

1.2 Personal Financial Manager Registration

To register as a HSWL Personal Financial Manager, go to https://www.ombudsmanpfmpregistry.org/pfmregistry and complete the Personal Financial Manager Registration form. Complete the steps in the table below to register.

Step	Action
1	Under 'Personal Financial Management Program Registry' section, click on 'Register as Personal Financial Manager' link.

<table>
<tr><td></td><td>
PERSONAL FINANCIAL MANAGEMENT PROGRAM (PFMP) REGISTRY

Commander / Command Designee

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.

Register as Commander / Command Designee

Personal Financial Manager

HSWL Personal Financial Managers must be registered in to access the registry. The registration form can be accessed by clicking on the "Register" link below. Once you have completed the registration form your account request will be forwarded for approval. You will be notified by email once your account is approved.

Register as Personal Financial Manager

Regional Practice *
- Select One -
First Name *
Last Name *
Email *
Secondary Email
Phone *
Alternate Phone

Address
FPO Format
Address *
Address 2
City
State
Country
Zip

Submit</td></tr>
<tr><td>2</td><td>Select appropriate checkbox for Regional Practice PFM.</td></tr>
<tr><td>3</td><td>From the Regional Practice drop down menu, select your Regional Practice.</td></tr>
<tr><td>4</td><td>Enter requested information (e.g., last name, first name, email, etc.) in the corresponding box.</td></tr>
<tr><td>5</td><td>Click Submit.
<table>
<tr><td>IF…</td><td>THEN…</td></tr>
<tr><td>Successfully submitted</td><td>Submission Sent Successfully message will display.
</td></tr>
<tr><td>Submission was not successful</td><td>Error message will display. Try again, if error message displays or contact one of the registry administrators.</td></tr>
</table></td></tr>
</table>

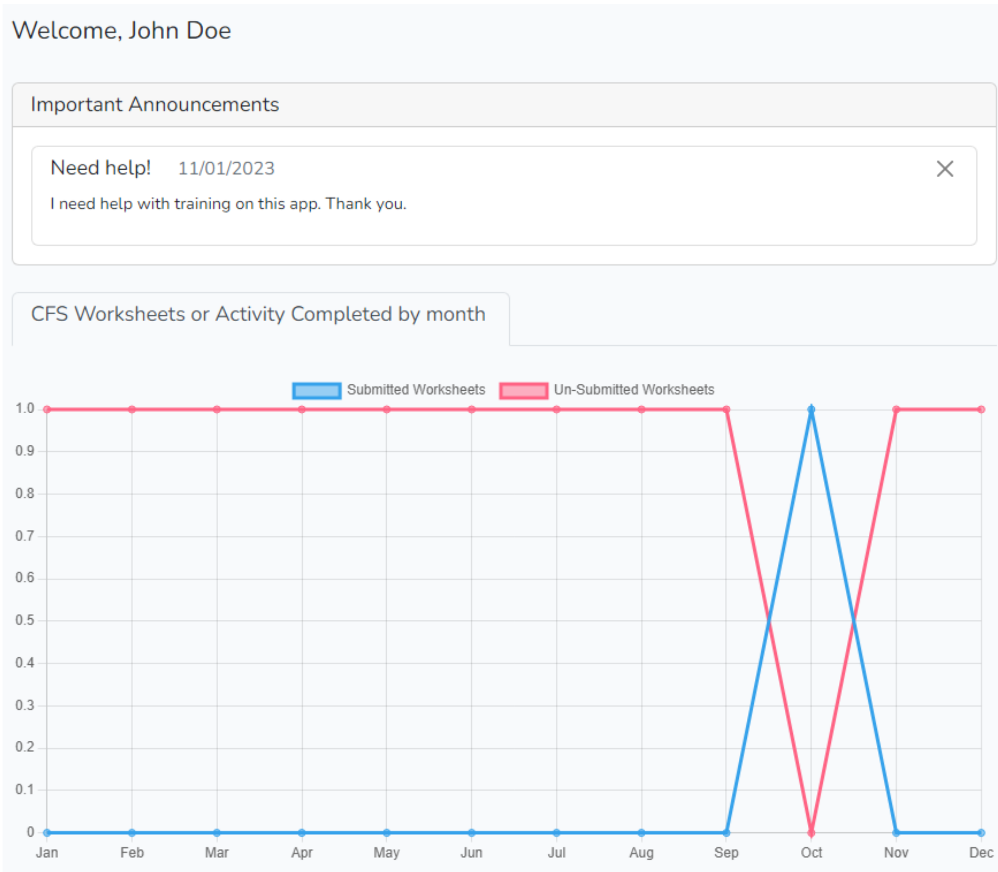
You will be notified by email when your account has been approved. Once your account has been approved you may return to the registry and logon.

1.3 Dashboard

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

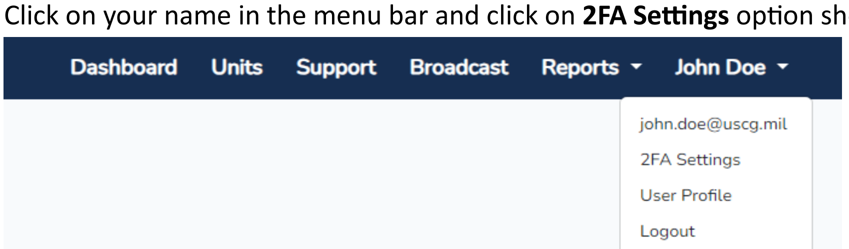
The Dashboard shows any Announcements posted by: Health, Safety and Work-Life Regional Practice (HSWL RP) Personal Financial Managers and PFMP Program Manager.

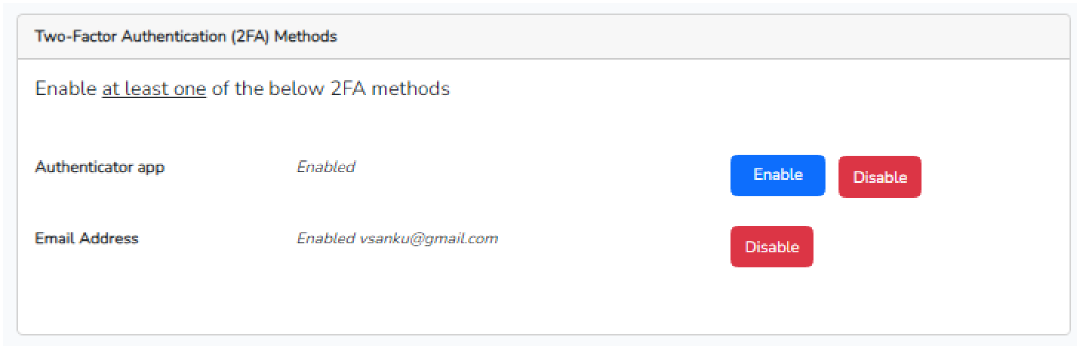
The Dashboard also shows worksheets summary by month. Clicking on the chart for a particular month shows the units list for that month.



1.4 Updating Two-Factor Authentication (2FA) Method

To reset 2FA authentication method:

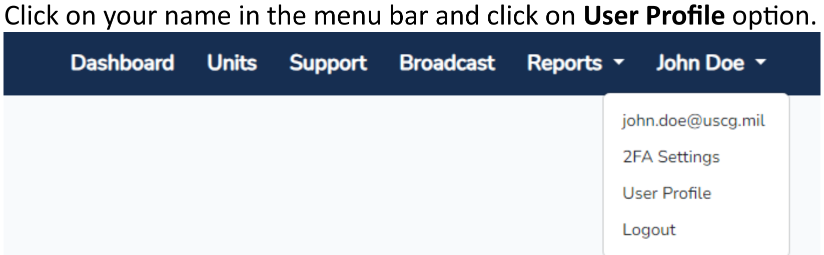
Step	Action
1	Click on your name in the menu bar and click on **2FA Settings** option shown below. 

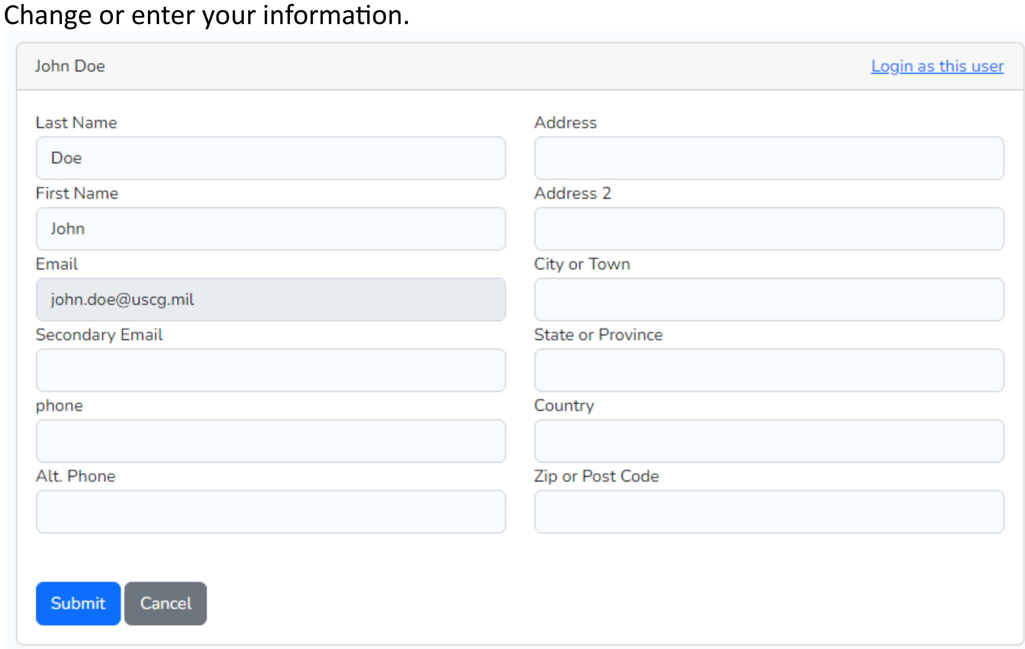
<table>
<tr><td>2</td><td>You can Enable or Disable a particular 2FA method by clicking the Enable and Disable buttons.


</td></tr>
</table>

1.5 Update Your Profile

To update your name, phone, address:

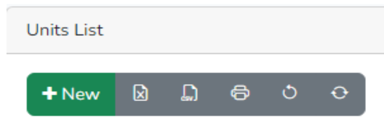
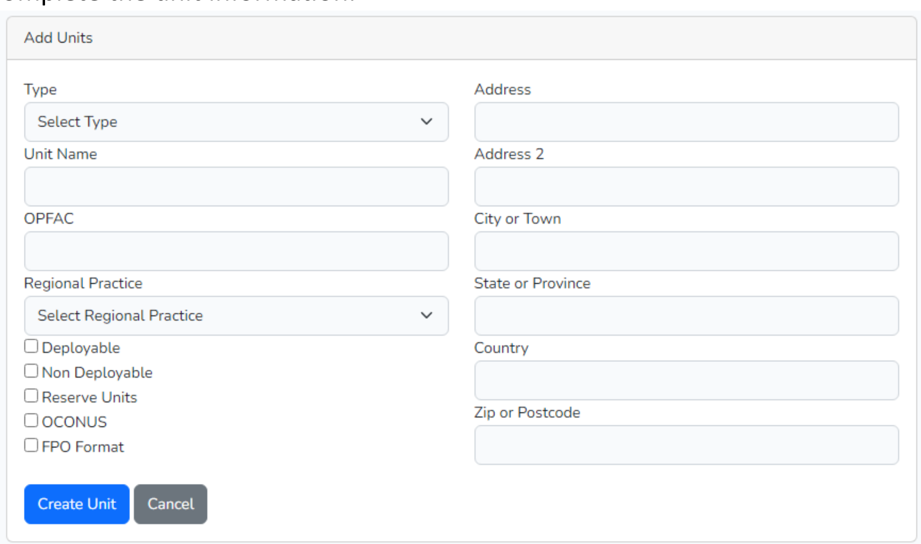
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click on your name in the menu bar and click on User Profile option.


</td></tr>
<tr><td>2</td><td>Change or enter your information.


</td></tr>
<tr><td>3</td><td>Click Submit.</td></tr>
</table>

1.6 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 Units menu item.
2	Click on New icon under Units list 
3	Complete the unit information. 
5	Click the **Save** icon.

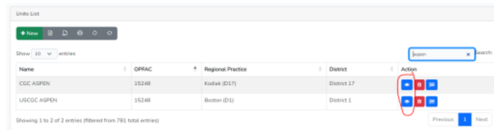
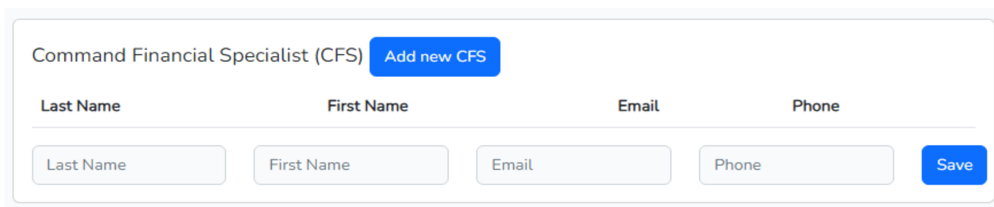
The unit will be verified and approved by the PFMP Program Manager. Approvals are normally processed within 24 to 48 hours of your request. After receiving approval, you can return to the registry and make your assignments.

1.7 Assigning Command Financial Specialist to a Unit

While it is the responsibility of the Commanding officer, Officer-in-Charge, or Command Designee to register and assign their Command Financial Specialist to their unit(s), there will be times when it is necessary for the Personal Financial Manager to make the assignment. This will assist you in maintaining a current Command Financial Specialist roster.

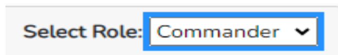
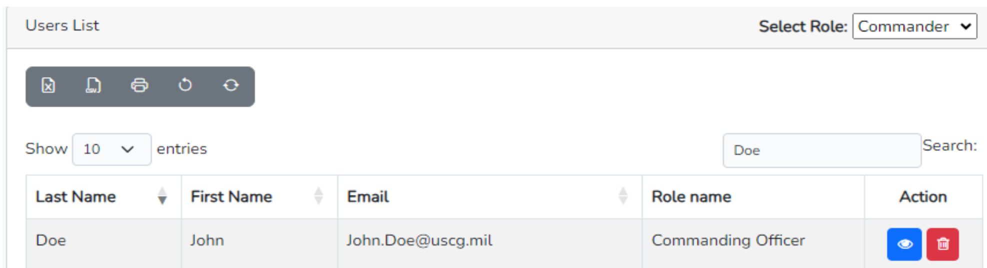
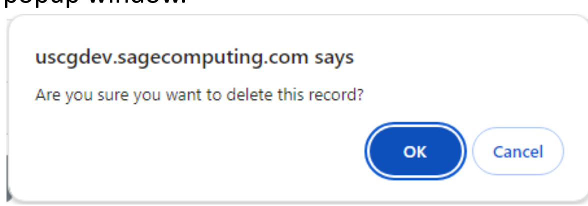
Registering Command Financial Specialists at the completion of CG PFMP training is one way to ensure Command Financial Specialists are assigned to their unit. The Personal Financial Manager can only assign Command Financial Specialists who are assigned to a unit located in their AOR. If you have Command Financial Specialists from another AOR attend your training, forward the Command Financial Specialist information to the servicing HSWL RP Personal Financial Manager, who can enter them into the PFMP Registry.

To assign a Command Financial Specialist:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click on Units menu item.</td></tr>
<tr><td>2</td><td>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>
<tr><td>Unit is not in your unit list</td><td>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.</td></tr>
</table>
NOTE: Unit name may be listed under different names, i.e., D11 may be Eleventh District.</td></tr>
<tr><td>3</td><td>Click the Add New CFS button in the middle of the Unit details screen. This will open a new Command Financial Specialist row.

</td></tr>
<tr><td>4</td><td>Enter last name of the CFS.
<table>
<tr><td>IF…</td><td>THEN…</td></tr>
<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 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>
</table></td></tr>
<tr><td>5</td><td>Click the Save icon.</td></tr>
</table>

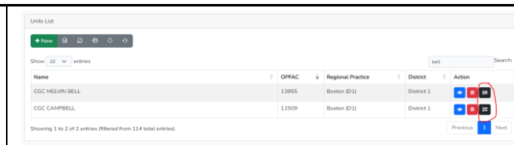
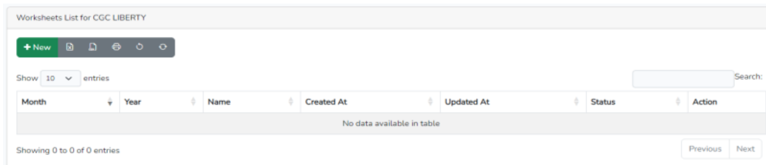
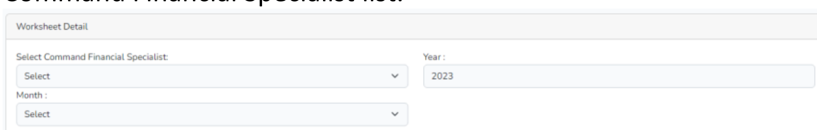
1.8 Deleting Personnel from the Registry

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click People from menu.
</td></tr>
<tr><td>2</td><td>Select either the Commanders or CFS from the drop down menu
</td></tr>
<tr><td>3</td><td>Enter the name of the Commanding Officer, Officer-in-Charge, Command Designee, or the CFS in the search box. The list displays matching records.
</td></tr>
<tr><td>5</td><td>Click the Delete icon in the appropriate user row. This will open a delete confirmation popup window.
</td></tr>
<tr><td>6</td><td>Click OK on the popup window to confirm delete.</td></tr>
</table>

1.9 Fill Worksheet

While it is the responsibility of the Command Financial Specialist, a Personal Financial Manager or Commander can fill a worksheet on behalf of an Command Financial Specialist. To fill a worksheet on behalf on a Command Financial Specialist:

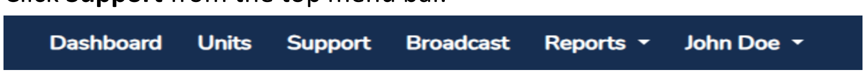
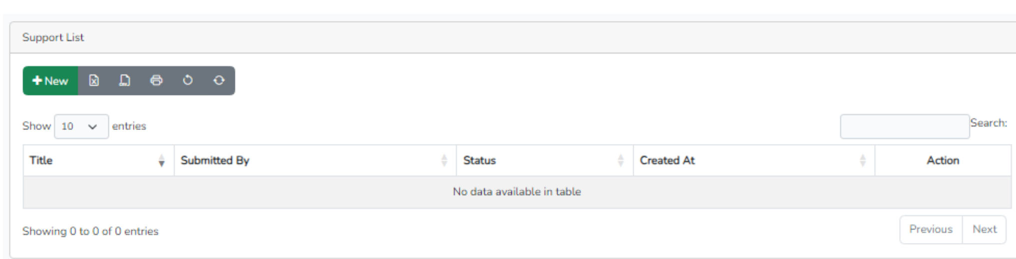
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click on Units menu item.</td></tr>
<tr><td>2</td><td>In the Search box, enter the unit name or the last 5 digits of the OPFAC
<table>
<tr><td>IF…</td><td>THEN…</td></tr>
<tr><td>Unit is in your unit list</td><td>From the list, click on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

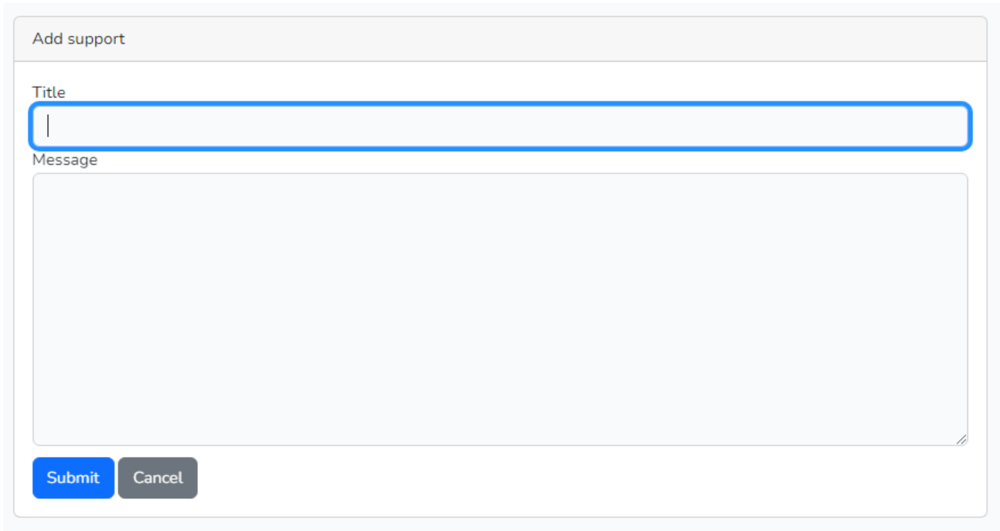
<table>
<tr><td></td><td><table><tr><td></td><td></td></tr><tr><td>Unit is not in your unit list</td><td>The list will go blank. Click Units and the list will repopulate. Go to the next section of this guide and complete steps for Adding a Unit.</td></tr></table>NOTE: Unit name may be listed under different names, i.e., D11 may be Eleventh District.</td></tr>
<tr><td>3</td><td>Click the New link on the worksheets page.

</td></tr>
<tr><td>4</td><td>Select the CFS name, on behalf of whom the worksheet is getting filled, from the Select Command Financial Specialist list.

</td></tr>
<tr><td>5</td><td>Fill the worksheet details.</td></tr>
<tr><td>6</td><td>Click the Submit as Final button.</td></tr>
</table>

1.10 New Support Request

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

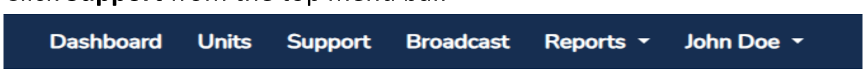
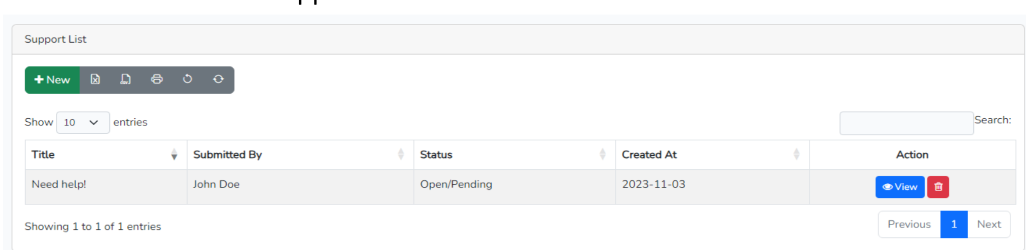
To submit a support case request:

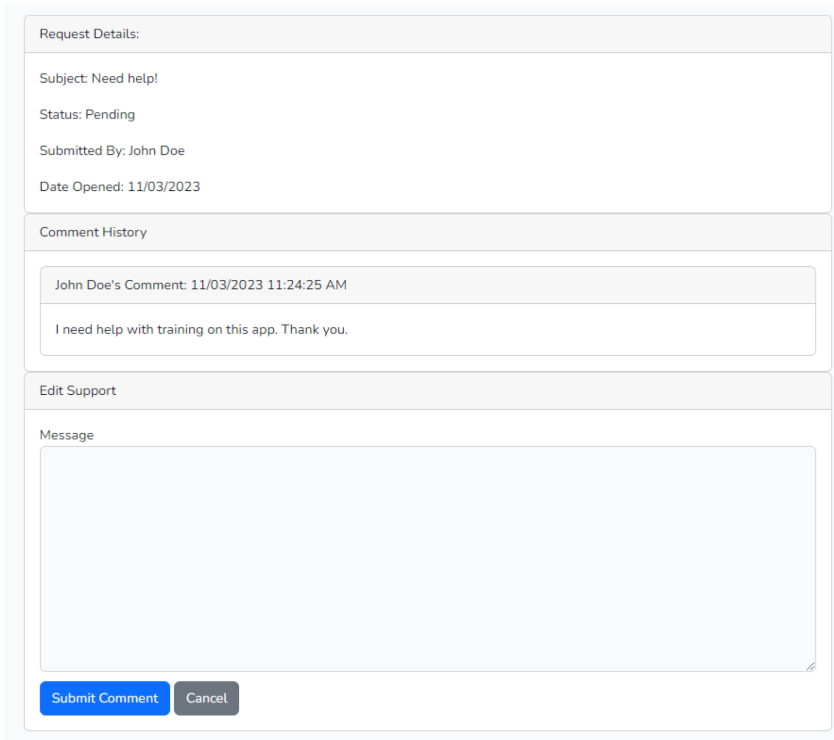
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click Support from the top menu bar.

</td></tr>
<tr><td>2</td><td>Click New.

</td></tr>
</table>

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**.

1.11 Add Comment to Support Request

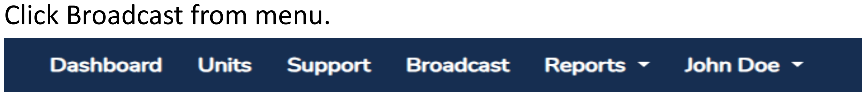
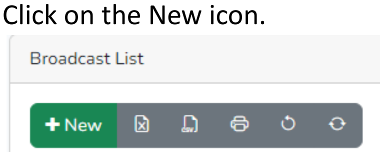
To add a comment to an existing support case request:

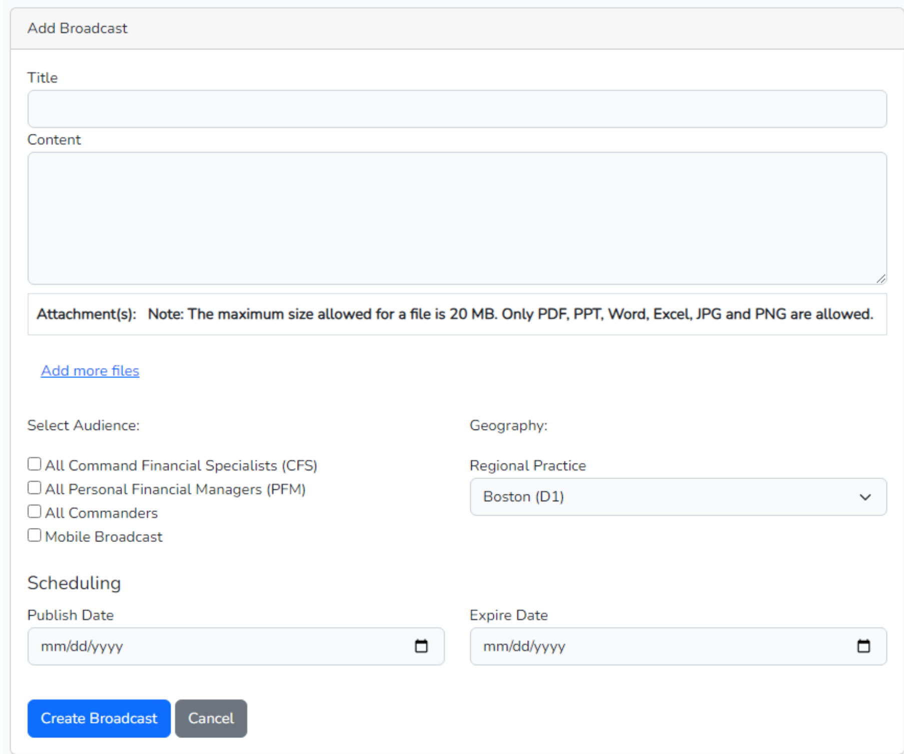
Step	Action
1	Click **Support** from the top menu bar. 
2	Click **View** next to the support case row. 
3	Add new comment in Message box under Edit Support section.

	
4	Click **Submit Comment**.

1.12 Broadcasts

The broadcast system was developed to assist Personal Financial Managers in communicating with Commanding Officers/Officers-in-Charge/Command Designees and Command Financial Specialists that fall within their area of responsibility. With broadcasts you can send real time information and resources about the CG PFM 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 PFM'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:

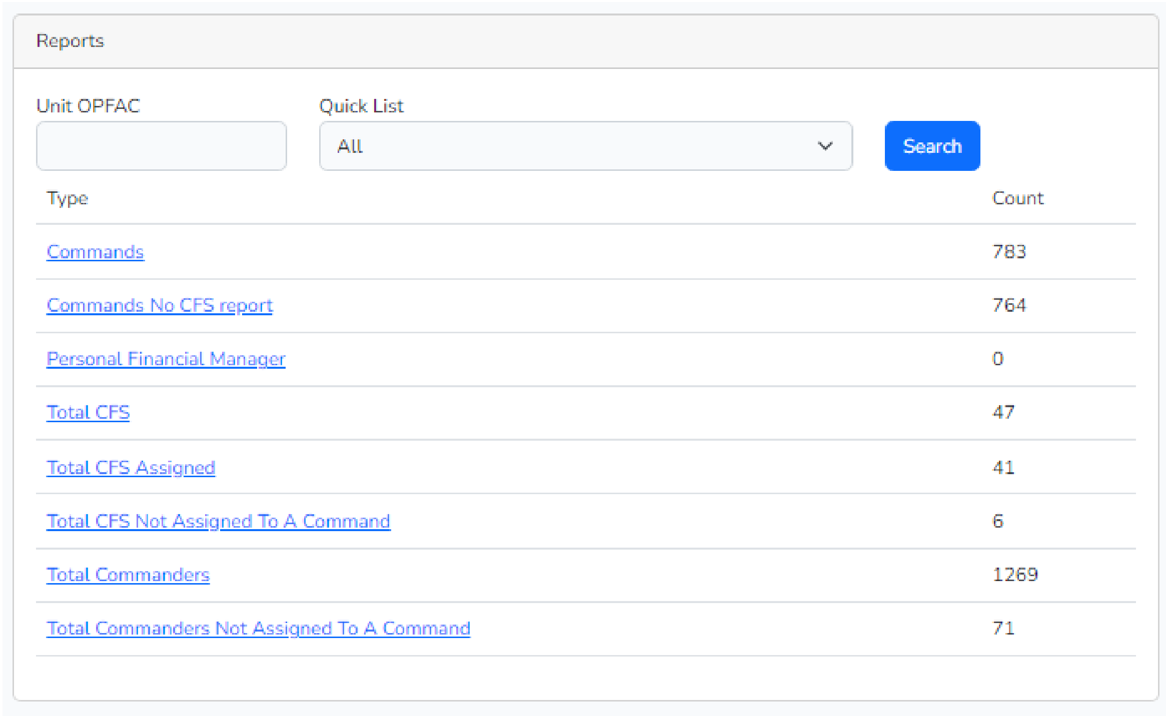
Step	Action
1	Click Broadcast from menu. 
2	Click on the New icon. 
3	In the Title field, enter a title for the bulletin.

	
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.

1.13 Count Reports

Every HSWL Personal Financial Manager 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, CFSs, Commanders and PFMs 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.

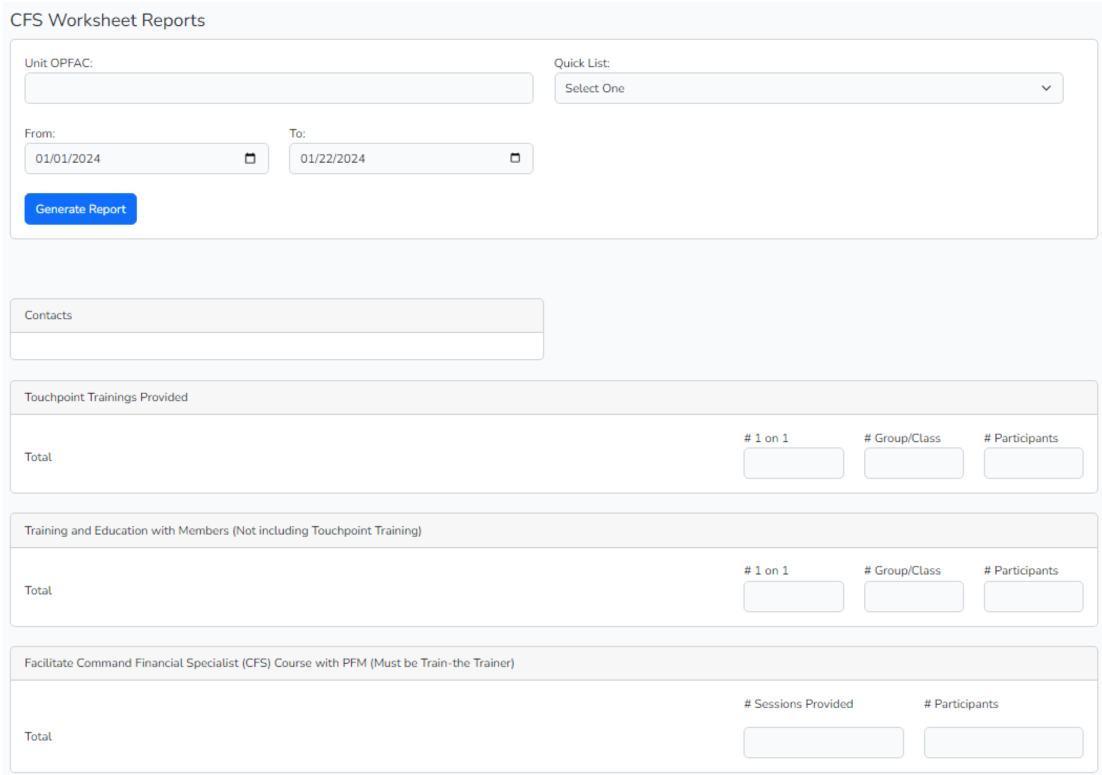


1.14 Worksheet Statistics

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



CFS Worksheet Reports

Unit OPFAC:

Quick List: Select One

From: 01/01/2024

To: 01/22/2024

Generate Report

Contacts

Touchpoint Trainings Provided

	# 1 on 1	# Group/Class	# Participants
Total			

Training and Education with Members (Not including Touchpoint Training)

	# 1 on 1	# Group/Class	# Participants
Total			

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

	# Sessions Provided	# Participants
Total		