DoD Financial Management Certification Program
Office of the Under Secretary of Defense (Comptroller)
Agenda

• DoD FM Certification: Purpose
• Competencies
• Applicability
• FM Certification Requirements
• DoD FM Learning Management System (LMS)
• Key Players in the FM LMS
• Using the Academic Matrices
• Getting Started – The Three-step Process
• FM Certification Resources
• Frequently Asked Questions and Q&A
• Summary
• Establish a framework to guide DoD FM professional development
• Intent is to make a good FM workforce even better!
  – Establish a mechanism to encourage key training in:
  o Audit Readiness
  o Decision Support/Analysis
  – Encourage career broadening and leadership
  – Transition to a more analytic orientation
  – Ensure financial management workforce has knowledge, skills, and abilities necessary to achieve auditable financial statements
• Develop a course-based rather than test-based certification
• There are 23 DoD FM competencies
  – 17 of the 23 apply to the DoD FM Certification Program

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<td>Financial Management &amp; Reporting Analysis</td>
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<td>Financial Reporting</td>
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Applicability

- Applicable to DoD Civilians and Military in the DoD FM Workforce
- All FM positions will be coded Level 1, Level 2, or Level 3
- No Grandfathering—no incumbent DoD FM members receive certification “automatically”; all must achieve certification
- Two years to achieve certification
FM Certification Requirements

- **DoD FM Certification Requirements**
  - Training in FM & Leadership Competencies (course-based)
  - Other Required Courses
  - FM Experience / DoD FM Experience
  - Developmental Assignment (Level 3)
  - Continuing Education and Training (CET)

- **System of Record is the DoD FM Learning Management System**

Find these tools @ FM Online

https://fmonline.ousdc.osd.mil/
DoD FM Learning Management System

- The LMS is used for administration, oversight, validation, records management, auditability, and to launch OUSD(C)-developed web-based courses
- Basic user information (e.g., name, organization, FM Certification Code) is populated from personnel systems of record
- Maintains the program course inventory aligned to the DoD FM and leadership competency and proficiency levels
- The DoD FM LMS is 508 compliant

Login with Username (provided via email)  Create a PIN & Remember It  View Your Personalized Curriculum
Key Players in the FM LMS

• **FM Member (user):**
  – Required to complete FM Certification w/in 2 years after official notification

• **FM Member’s Supervisor:**
  – Acts as approval authority for achievement of competencies and other certification requirements necessary

• **Approver Level 2 (A2) – Optional position:**
  – An intermediary authority, at the organizational level, for reviewing requests for certification already approved by the supervisor prior to forwarding to the Component Certification Authority

• **Component Certification Authority (CCA):**
  – Appointed to serve as the approval authority for achieving Certification

• **Component Administrator (CA):**
  – LMS system administrator who manages organizational hierarchies (to include FM member and supervisor) and provides first response support for answering questions and solving problems specific to the LMS
Many of you have completed academic courses in financial management (FM) or leadership-related subjects from accredited colleges and universities. Using the FM and Leadership Academic Matrices you may determine if these course hours apply to initial certification requirements. Work with your supervisor and follow the steps below to determine if your coursework applies.

**Collect**

- Collect academic transcripts

**Identify**

- Identify the appropriate FM Certification level to which your academic course may apply

**Match**

- Use the title of your academic course to match it to the correct competency using the matrix

**Convert**

- Use the Course Hour Conversion Chart to determine the course hour value

**Complete**

- Complete the three-step process for applicable courses
### Getting Started: The Three-step Process

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<th>Get Certified Using the DoD FM Learning Management System</th>
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<td>Watch Training Videos</td>
<td>Record Learning of Achievement</td>
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<tr>
<td>Complete Practical Exercise</td>
<td>1. Work w/ supervisor to assign Primary and/or Alternate Track</td>
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<tr>
<td>Collect Documentation</td>
<td>2. Use your Learning History Worksheet to record information for ONE certification requirement</td>
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<tr>
<td>Fill out Learning History Worksheet</td>
<td>3. Record learning for ALL courses needed to satisfy the requirement</td>
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<tr>
<td>Review Learning History Worksheet w/ Supervisor</td>
<td>Request Achievement Approval</td>
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<td>Develop a Plan for Success!</td>
<td>Request Certification Approval</td>
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#### Three-step Process

1. **Record Learning of Achievement**
   - Work w/ supervisor to assign Primary and/or Alternate Track
   - Use your Learning History Worksheet to record information for ONE certification requirement
   - Record learning for ALL courses needed to satisfy the requirement

2. **Record Documentation**
   - Record learning for the appropriate achievement documentation
   - Remember: Combine all documents for each achievement into one PDF file, less than 2MB

3. **Request Achievement Approval**
   - Record Learning for the appropriate achievement and request supervisor approval
   - Repeat this 3-step process for each achievement documented in the FM LMS until all certification requirements are met

#### Request Certification Approval

1. Check that the three-step process is complete for each certification requirement
2. Record learning for your Certification Level and request CCA Approval.

#### FM Online: https://fmonline.ousdc.osd.mil

These courses are available w/in the FM LMS and via FM myLearn*. Approved substitution courses are available on FM myLearn*.

* If completing a course via FM myLearn, you must follow the 3-step process to document course completion inside FM LMS.
FM Certification Resources
available @FM Online or join us on LinkedIn
http://ow.ly/sZfDv

Quarterly Newsletter
Certification Update
Lessons Learned
Best Practices

DoD FM Certification Handbook
Program background & overview
Detailed requirement descriptions
Checklist to get started

Requirements Datasheets
Outline requirements for each level

Practical Exercise
Follow “Kelly,” a GS-14 through each step of certification

Overview and Training Videos
Video series introducing key elements of program

Competencies & Proficiency Levels
Defines each of the 17 FM competencies and provides examples at each Proficiency Level.

Learning History Worksheets
Organize your prior training using these worksheets

FM myLearn
E-catalog of FM courses aligned to FM and leadership competencies.

LMS User Quick Start Guide
Outlines the Three-step Process for achieving certification using the FM LMS

Frequently Asked Questions
Compilation of over 100 questions, organized by category

LMS Job Aids
Provide step-by-step instructions for all FM LMS tasks.
<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
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| I sit in a Defense Acquisition Workforce Improvement Act (DAWIA)-        | coded position. Am I required to complete both certifications?  
| Will my prior FM experience count toward meeting the experience         | requirement for my certification level?  
| What is the difference between a Primary Track and an Alternate Track?  | What happens to my training record if I leave DoD and come back?  
| How can I earn CET credits?                                              | May I obtain a higher certification level than the level required by my current position?  

View more questions at FM Online
https://fmonline.ousdc.osd.mil/
The DoD FM Certification Program:
- Provides a certification framework for DoD FM Community
- Gives the FM Workforce a standard body of knowledge
  - Focuses on Analytics and DoD Audit Readiness, to include internal controls and accountability
- Develops expertise standards using DoD FM Competencies
- Coded Level 1, 2, or 3 based on scope and complexity of position
- FM experience requirement at Level 1, 2, or 3
- Promotes use of DoD FM existing courses
- Encourages college degrees and FM test-based certifications

Makes a Good FM Workforce Better… Adding More Credibility to What We Do
Back-up