

DoD FM Certification and Beyond

by Glenda H. Scheiner, DFMCP3, CDFM-A



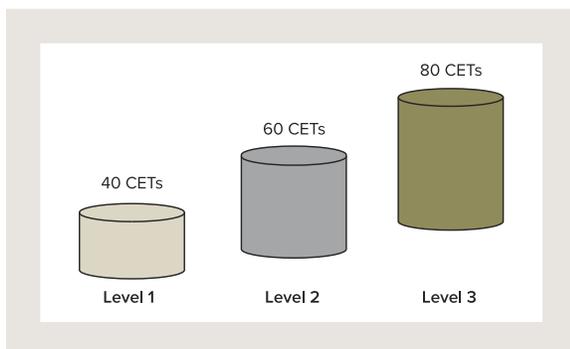
A journey of a thousand miles begins with a single step.

– Lao Tzu

Two years ago, 1 July 2014, was the official start of the DoD FM Certification Program for all financial management (FM) workforce members launched into the program by that date. As of early May 2016, approximately 30,000 members have achieved their required certification. However, achieving the DoD FM Certification is only the first step in helping you achieve new heights in financial management. Initial certification is just the beginning of the continuous professional development journey of newly credentialed financial management workforce members. This article discusses what comes next for those who have already achieved certification, tools for those still working on a required certification, and policy for those requiring an extension.

I Am Certified – What Now?

Once you earn your initial DoD FM Certification, you are required to earn a specified number of Continuing Education and Training (CET) hours every two years from the date of your certification, as shown below. CETs are a critical component of the certification program. They help you maintain your skills, stay abreast of current information affecting the FM community, and learn new FM techniques. CETs are a key way to ensure that you are ready for the fiscal challenges of the future.



CETs are required only after you have achieved your initial certification. You may not receive CET credit for education and training taken prior to the achievement date of your initial certification. If you have another FM related certification (CPA, CDFM, etc.) you may also apply the continuing education earned for those certifications to your CET requirement as long as it was earned during your two-year FM Certification CET window. CETs do not have to be aligned to the FM Certification Program and courses do not have to be listed in FM myLearn. You may certainly use financial management and leadership training courses included in myLearn, but it is not required. Additionally, if you choose to use coursework which has been aligned to the Program, your CETs do not have to be at the same proficiency level as the training required to achieve your initial certification. If you are certified at Level 1 or Level 2, it is a great idea to take training available in FM myLearn for the next certification level as part of your CETs. Not only will it meet your CET requirement, once you require the next higher level of FM Certification you may apply that training toward meeting the certification requirements. If you are a Level 3, you may choose to take Level 1 or Level 2 courses to brush up on your foundational skills.

So what counts for CET credit? You may earn CETs in a variety of ways:

- FM and leadership courses, symposia, or training events. CET hours are equal to the total number of training hours for the event. For example, if you attend a regional PDI that includes 7 hours of FM or leadership related training, you earn 7 CETs. Be sure to obtain a certificate or other type of documentation that provides confirmation of the event date and the number of training credits provided.
- Courses/training used to satisfy continuing professional education requirements for any of the 20 approved FM-related test based certifications. If you take training that satisfies the continuing professional education (CPE)

requirements of the Certified Defense Financial Manager (CDFM), Certified Public Accountant (CPA), Certified Internal Auditor (CIA), etc. those credits are accepted on a unit-for-unit basis (e.g., 1 CPE = 1 CET)

- Courses/training used to satisfy continuing professional education for acquisition (DAWIA) certifications. If you take training that satisfies your continuous learning points (CLP) requirement for DAWIA certifications, it will be accepted on a unit for unit basis to meet your CET requirements (e.g., 1 CLP = 1 CET)
- Courses listed in the FM MyLearn e-catalog (including OUSD(C)-developed web-based courses). The number of CET hours is equal to the total number of financial management and leadership-related course hours, which may be more than the aligned hours.
- Academic FM and Leadership courses. If you take college courses in financial management or leadership, you may apply those credits to meet your CET requirement. One semester hours is equivalent to 15 CETs; one quarter hour is equivalent to 10 CETs; and one Continuous Education Unit (CEU) is equivalent to 10 CETs.

You need to record your CETs in the Learning Management System (LMS). You may record them as you go along, noting the event in the memo field, or record them when you are finished. Either way, ensure that you have them recorded by your due date. If you choose to record each course/training event separately, then the LMS will count down your remaining required CET hours with each entry. For step-by-step instructions on recording CETs, use the job aid entitled “How to Record CETs in the DoD FM LMS.” You will not upload your CET documentation into the LMS, but be sure to keep a personal file for a minimum of two CET cycles (each CET cycle is 24 months). If you are randomly selected for one of the monthly CET audits, you will be contacted by your Component and asked to provide documentation of your completed CETs. Be sure to keep all of your CET documentation!

If you record each CET training event separately, you can track CET progress along the way. Run your CET Scorecard report in the LMS to track your CET progress over your specified CET two-year timeframe. To run the report, log into the LMS and select the CET Scorecard link in the DoD FM Certification News and Resources box. Once you have finished the required CET hours, don't forget to Record Learning in the FM LMS for “FM CET Level X Requirements Complete” (replace X with 1, 2 or 3 as applicable) to finalize your CET achievement for that two year cycle.

Once your CET Scorecard report indicates “All Requirements Met,” you have completed your CET requirement. CETs work on a 24-month schedule from the time that you achieved certification; so even if you finish early, your next cycle of CETs will not start until 24 months have passed. For example, if your initial certification was achieved on June 30, 2016,

your CETs will be due by June 30, 2018, June 30, 2020, and so on.

New Tools

Whether you are new to the certification program, are still working on your initial certification, or have recently taken a new position requiring a higher level of certification, there are some new tools available to help you. These tools are: the Academic Course Search tool and the interactive Learning History Worksheet (iLHW).

Before we learn about these tools, let's get a refresher on the use of academic courses to meet FM Certification Program requirements. You are permitted to use Financial Management and Leadership academic courses to meet your certification requirements. Academic courses are defined as courses which provide college credit. Academic courses at the 1XX or 2XX level may be used to satisfy Certification Level 1 requirements. Academic courses at the 3XX level are used to satisfy Certification Level 2 requirements. Certification Level 3 requirements may be satisfied by academic courses at the 4XX or Master's degree level. Academic courses may be used only if they align to the FM certification program and are reflected on the academic matrix (as a close title match) or in the FM myLearn Academic Course Search.

Academic courses are considered aligned to the Certification Program in one of three ways: 1) course is a close/exact title match to a title listed on the Academic Matrix; 2) course has been previously approved and is listed in FM myLearn's academic search; 3) or course has been submitted for review and is approved by the governing body's course alignment team. First, if the course title is included on the Academic Matrix for a given competency, then you may use the course. If a course is an exact match or a “close title match” to a course on the Academic Matrix (and it is at the level required by your certification), then it is considered aligned and may be used to meet the Certification Program requirements. For documentation purposes, insert your course title name in the memo field when you record learning in the Learning Management System (LMS). Additionally, include a copy of your transcript which shows your successful completion of the course. TIP: As an added bonus for your supervisor and Component Certification Authority (CCA), you may also include a copy of the approved titles from the Academic Matrix for that competency.

The second method is to search in FM myLearn in the Academic Course Search tool, explained below, to determine whether your course has already been submitted by another FM member and aligned to the program. If so, it will be in the academic course search with all the competency alignments that have been approved and disapproved.

The third method is to submit your course title, course description (syllabus), and transcript to your course manager for a governing body alignment team review. This method

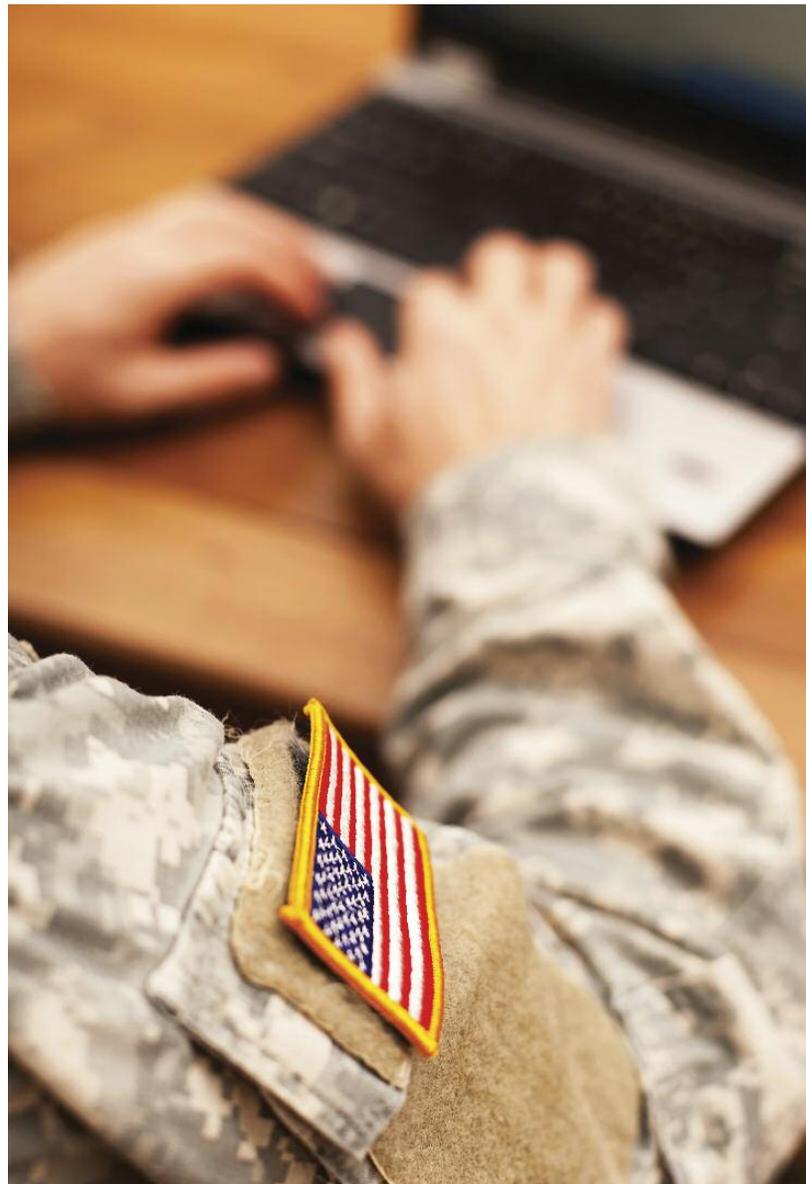
may be used when an academic course title is not a close match but the course covers the required information for a given competency and it is not yet included in the Academic Course Search tool. The submission template for this last method is available on FM Online.

The new academic course search tool enables you to find all academic (undergraduate and graduate) courses that have been previously aligned and approved to meet DoD FM Certification Program requirements. The Academic Course Search tool is accessible from FM myLearn and includes an automated version of the Academic Matrix. It also includes a catalog of all previously aligned academic courses. You may filter the courses in the electronic catalog by institution, course title, course number, or competency.

To use an academic course to meet certification program requirements, first determine whether the course is a “close title match” to courses already approved and included in the Academic Matrix. To find these course titles in the Academic Course Search tool, filter by Academic Matrix and the desired competency. If your course title matches one of the titles shown, upload the documentation as described above.

If your course is not a “close title match”, search the Academic Course Search database to determine if the course has been previously aligned. You may search by your institution name, course number, or course title. If the course title is in the database, information on previously approved or disapproved competencies will be shown. If the course was approved for the competency you need, click on the “print” icon to obtain a memo to include along with your transcript in the LMS. If you are using the new iLHW, you may add the course to your iLHW with the click of a button. If your course is not shown in the database for that competency, and you believe it will align to the program, you may request to have the course aligned through your course manager as discussed previously.

The second new tool is the recently released interactive Learning History Worksheet (iLHW). This tool is accessible from FM Online and is an automated version of the Learning History Worksheet. It displays the required curriculum for your FM Certification level so that you may populate the training that you have already accomplished and identify the gaps remaining to be filled in order to achieve certification. It is interfaced with the FM myLearn electronic catalog of training courses and the Academic Course Search tool. Even if you have already achieved initial certification, don't forget about this great new tool. If you get promoted or move to a different job requiring a higher certification level, you will definitely want to utilize this tool which simplifies the process. The iLHW allows you to search myLearn for courses you taken. Once you select a course, it will auto populate the appropriate credits for that course for all applicable competencies. Once you have input enough training to fulfill an achievement, a green check mark will



appear. You may then opt to auto-record the learning (Step 1 of the LMS three-step process) with the click of a button. This is a tremendous time saver! The data recorded in this manner will be updated in the LMS on a weekly basis. If you are in a time crunch, you still maintain the option of recording the information directly in the LMS. Another bonus to the iLHW is flexibility. If you have entered courses on your worksheet, then decide you want to make a change to an entry, you have the option of deleting the information yourself from the iLHW rather than having a component administrator do it for you. Of course, this works only if the course has not yet been recorded in the LMS.

Policy Updates

Participants in the FM Certification Program have two years to obtain certification per DoDI 1300.26, Enclosure 3, para 4.a.1. In cases where a participant is unable to obtain the

certification within the requisite timeframe (e.g., does not have the requisite number of years of total FM experience required), the DoDI provides the opportunity to request a one-year time extension from the Component Certification Authority (CCA). The Time Extension Request Form on FM Online is used to request the extension. After obtaining the approval of the supervisor, the participant uploads the approved request into the LMS to request the approval of the time extension from the CCA. If approved by the CCA, the participant will need to print the approval memo from the LMS and provide it to the appropriate servicing personnel office so that the “required by” date can be updated in the personnel system. Participants are also required to have a valid time extension approved by the CCA if they do not achieve the required numbers of CETs within the allotted timeframe.

Conclusion

Achieving the DoD FM Certification is one item on the overarching career roadmap for financial managers. Not familiar with the FM Career Roadmaps? Check out the one that applies to your series/occupational specialty and learn more; they are available on FM Online. A journey of a thousand miles truly does begin with one step! So don’t consider achievement of the FM Certification the end of the

road; it is just the beginning of your ongoing professional development journey as you achieve new heights in financial management.



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