

DoD Financial Management Certification Program Handbook



*Certification
Experience
Leadership
Career Broadening
Education & Training
Continuous Learning*



Revised May 2014



As the Department of Defense (DoD) Comptroller, I have the pleasure of introducing this DoD Financial Management (FM) Certification Handbook, which will provide you a user-friendly guide for understanding, participating, and succeeding in the DoD FM Certification Program.

This handbook provides background and explains the elements of the certification program in detail. It also provides you with a list of items to complete once your organization is implemented into the program.

The FM Certification Program is a hallmark in the development of our FM workforce. While I believe today's DoD financial managers are generally well-trained, I also believe the certification will provide a DoD-wide framework to guide our professional development and help us better adapt to future requirements. These emerging requirements include the training we need to achieve auditable financial statements and to better assist our commanders and managers in using information to make decisions. This standard framework and training will also better help us meet the demands of an increasingly complex and challenging national fiscal environment. We owe our best to the American taxpayers – supporting the nation's security with as few of their resources as possible, and accounting for those resources with a high level of professional skill.

This new framework also helps new and more seasoned people alike in determining what they should be learning at each step of their careers. So, I appreciate your interest in getting to know more about the DoD Financial Management Certification Program and using this handbook to help you along this new standardized path for becoming the best financial managers. I also ask you to put this handbook to the test. If you can help to make it better and more relevant, please let us know. Everyone wins with your feedback!

And as always, thank you for your continued service to our nation and for helping to build a stronger Financial Management workforce.

Robert F. Hale

Under Secretary of Defense (Comptroller)/
Chief Financial Officer, Department of Defense



What's This All About?

Now more than ever, the Department needs a well-trained financial management (FM) workforce to help DoD leadership identify and address emerging budget challenges and to be a key enabler for achieving auditable financial statements. While various Department of Defense (DoD) organizations have outstanding financial management training programs, the Department lacked an enterprise-wide framework to ensure optimized training for every dollar spent in key areas such as audit readiness and decision support. Thus, the concept of a new Certification Program for DoD financial managers was born.

We are a well-trained workforce. However, until now, our training has not been standardized across the DoD. Professional development should include experience, education and training, and leadership development. The DoD FM Certification Program emphasizes all of these. This handbook will go in depth on how competency-based training, leadership development, and continuous learning through developmental assignments come together to provide a professional development framework through the DoD FM Certification Program.

The Certification Program also highlights training gaps to help us prioritize what kind of training to develop next. In short, we will keep better track of who's learning what and when, and you'll be able to focus your training by targeting courses that meet the certification and proficiency levels outlined by the position you hold – plus you'll see what's needed to meet the next certification level. The Certification Program helps you build a training plan focused on specific competencies at various proficiency levels that you will need to understand to become certified. Further, the Certification Program helps you develop your financial management and decision support skills by honing the financial management competencies crucial to support the warfighter.

This handbook provides you a snapshot of why the DoD FM Certification Program is important, what the certification requires of our workforce, and what you can do now to get started.

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Why It Matters

Today's financial managers are highly skilled professionals entrusted by the American people to responsibly manage hundreds of billions of dollars each year in the defense of our country. This responsibility is not taken lightly and only increases the commitment to our citizens to handle their money with care.

It was apparent in the late 1980s that financial management needed attention, so Congress passed the Chief Financial Officer's (CFO) Act of 1990. This act provided tight financial control over agency operations and the central coordination of financial management functions to support an efficient administration of the executive branch. It centralizes organization of federal financial management, requires long-term strategic planning to sustain modernization, and develops projects to produce auditable financial statements for the federal government. Just as auditable financial statements validate responsible spending to the public, the DoD FM Certification Program, with its comprehensive framework across relevant competencies, validates the skills of our FM workforce.

After 20 years, the act is seen as a major improvement to management of government funds and spurred increased DoD efforts to achieve audit readiness in 2005 with the introduction of Financial Improvement and Audit Readiness (FIAR). The DoD FIAR plan was developed to improve financial information and auditability of financial statements. It requires departments to improve processes, internal controls, and systems supporting information most often used to manage assets. The Under Secretary of Defense (Comptroller) initiated the effort to develop the [DoD FM Certification Program](#) in 2011. This program is the blueprint for ensuring that the DoD FM workforce is properly trained to meet current and future FM challenges and to support the warfighter.

With the nation struggling to control spending, the debates over national priorities have put every program across the federal government in the crosshairs of our national leaders, and the DoD is no exception. Our challenge will be to continue to meet our national security objectives in an increasingly dynamic national security environment, and to do it with significantly fewer resources. This evolving picture will place greater demands on the FM workforce to provide guidance using its understanding of the budget process, financial management, and decision support skills.

We know we have a highly skilled workforce. This Certification Program will instill confidence in our taxpayers that the defense financial management workforce is properly trained to tackle the challenges ahead and to provide outstanding decision support to leadership, enabling them to make tough decisions for the good of the country.

Now that you have an understanding of how this Certification Program was born and why it is important, let's take a look at it in more detail.

DoD FM Certification Program Background and Overview

The Fiscal Year (FY) 2012 National Defense Authorization Act (NDAA) authorized the Secretary of Defense to establish a financial management professional certification program that requires DoD employees who perform financial management functions, both civilian and military, to attain and maintain a DoD FM Certification. For the first time ever, the FM workforce across all the Services and the Defense Agencies is going to have a standard training framework to make sure we're being trained on the right things at the right time. One of the primary goals of the Certification Program is to encourage continuous learning and professional growth across all levels of DoD FM Workforce. Unlike test-based certifications, the DoD FM Certification credential does not depend on passing a test. Instead, it is a course-based certification based on completing required courses in specific areas, or competencies, of financial management and leadership.

Your progress depends on completing courses aligned with certain competencies according to the position you occupy. The Under Secretary of Defense (Comptroller) convened a Senior Working Group composed of representatives from across the Department to develop a framework for the DoD FM Certification Program, identifying 23 competencies important to financial managers. Seventeen of these FM competencies are the fundamental building blocks of the DoD FM Certification Program. In general, competencies are a combination of knowledge, skills, and abilities that



an individual needs to perform work roles or occupational functions successfully. They create a common bond of understanding and a common language for a functional community such as financial management. They are used to clarify the knowledge, skills, and attributes needed to perform and achieve desired results. In short, competencies specify what areas of financial management we want our professionals to understand.

For each competency, five proficiency levels have been identified, with the first representing the basic level of knowledge and the fifth representing expert knowledge. FM competencies have been aligned to each of the various occupational series/specialties within FM. So when you read that the program is competency-based, it just means that experts identified skill sets DoD FMers need to know given their job responsibilities. While there are 23 FM competencies, there typically are only 3 or 4 that align to a particular occupational series/specialty – so don't be alarmed that you will have to become proficient in all 23 competencies. However, there is one additional area, separate from the DoD FM competencies, in which all FMers will be required to develop: Leadership. By linking the DoD FM Certification Program to the DoD Civilian Leader Development Continuum, the Certification Program emphasizes leadership development.

The goal of the Certification Program is to improve the functional and leadership capabilities of the DoD FM workforce. This program is designed to foster continuous learning across DoD FM to show the American people and our national lawmakers that we are honest brokers of taxpayers' dollars.



Who's Who

It takes a team of dedicated individuals to keep this program moving forward to better our workforce. The DoD FM Certification Program's management structure provides overarching governance to ensure that the program is synchronized and managed consistently across the Department. The governance structure provides stability for you, while ensuring each organization has enough flexibility to carry out the program to best fit its needs. Four groups comprise the governance structure, each with varying roles and responsibilities.



The Certification Program Senior FM Leadership Group oversees the operation of the DoD FM Certification Program and meets at least twice a year to provide strategic-level oversight and guidance for the program. They make strategic decisions to ensure the program remains relevant in the changing DoD environment. Membership includes:

- Under Secretary of Defense (Comptroller)/Chief Financial Officer, Department of Defense (USD(C)/CFO), Chair
- FM Office of the Secretary of Defense Functional Community Manager (OFCM)
- Assistant Secretaries, Financial Management and Comptroller of the Military Departments
- Directors of Defense Contract Audit Agency (DCAA) and Defense Finance and Accounting Service (DFAS)
- Director, Acquisition Resources and Analysis, Office of the Under Secretary of Defense (OUSD), Acquisition, Technology, and Logistics (AT&L)
- Others, as the Chair considers appropriate

The DoD FM Component Functional Community Manager (CFCM) Advisory Board

plays an important governance role by providing certification oversight and addressing time sensitive policy matters. They provide input and recommendations to the Senior FM Leadership Group. The advisory board meets quarterly, or as needed, to address certification matters. They work your issues to a satisfactory conclusion and make recommendations to the Senior FM Leadership Group on your behalf.

Membership includes:

- FM OFCM, Chair
- FM Component Functional Community Managers (CFCMs) of the Military Departments
- FM CFCMs of DCAA, DFAS, Defense Information Systems Agency (DISA), Defense Logistics Agency (DLA)
- Others, as the Chair considers appropriate
- Non-voting members include Office of the Under Secretary of Defense for Intelligence (OUSD(I)), Defense Acquisition University, and rotational Director, Acquisition Career Management

The DoD FM CFCM Working Group oversees the day-to-day execution of the DoD FM Certification Program at the component level and advises the DoD FM OFCM on workforce and program issues. This group, chaired by the FM OFCM, meets monthly, or as needed, and is composed of the DoD Military Department and Defense Agency FM CFCMs and others, as appropriate.

The Governing Body is responsible for developing the rules to align courses to applicable FM and Leadership competencies via the Course-to-Competency (C2C) Alignment Process (see Appendix B). They work with each organization's Course Manager to align FM and Leadership courses and enter them into the FM myLearn e-catalog and eventually into the FM Learning Management System (FM LMS) for use in the Certification Program. Course Managers work with you to: identify any courses not currently in the FM myLearn e-catalog; gather required information to properly align them; and submit them to the Governing Body.

The Governing Body consists of the FM OFCM (Chair) and representatives from the Military Departments, DCAA, DFAS, DISA, DLA, and other non-voting members.





FM and Leadership Competencies: The Building Blocks of FM Certification

So far, we've talked about the DoD FM Certification Program, how it came to fruition, and its governance structure. Now, let's take a moment to review in more detail the DoD Enterprise-wide FM competencies, the building blocks of the Certification Program. These competencies reflect of FM skills you use every day at work.

As you'll see below, the FM competencies consist of a set of key words followed by a definition. Each definition begins with an action verb and identifies a process that impacts a related activity. The competencies have five levels of proficiency or mastery. These proficiency levels begin with an action verb, identify a basic level of knowledge and understanding, and increase in complexity. See page 10 for more information on proficiency levels.

Accounting Analysis – Analyze, evaluate, and review accounting data and reports using business tools and applications, and performance metrics to provide recommendations

Accounting Concepts, Policies, & Principles – Apply federal accounting standards, fiscal law, policies, regulations, principles, standards, internal controls, and procedures to financial management activities

Advanced Financial Management – Develop, monitor, interpret, and report standardized processes/operations to ensure transparency and compliance with financial statutory, regulatory, and leadership guidance with the intent of promoting effectiveness and accountability

Audit Concepts, Policies, & Principles – Apply the Federal Acquisition Regulation, Generally Accepted Government Auditing Standards, Generally Accepted Auditing Standards, fiscal law, internal controls, policies, regulations, principles, standards, and procedures governing audit activities

Budget Concepts, Policies, & Principles – Apply the DoD Planning, Programming, Budgeting, and Execution, fiscal law, policies, regulations, principles, standards, and procedures to financial management activities

Budget Execution – Manage budget requirements by allocating, monitoring, and analyzing budgets in compliance with statutory/regulatory guidance

Budget Formulation, Justification, & Presentation – Manage budget requirements by forecasting, developing, and justifying budgets in compliance with statutory/regulatory guidance

Commercial Pay Concepts, Policies, & Principles – Apply commercial pay legislation, administrative and regulatory requirements, laws, and policies governing commercial pay activities and processes

Decision Support – Perform value-added financial, accounting, or economic analysis to make informed decisions that better utilize resources and improve mission effectiveness

Financial Concepts, Policies, & Principles – Apply fiscal law, policies, regulations, principles, standards, and procedures to financial management activities

Financial Management Analysis – Analyze, evaluate, and review budget and program issues and financial data and reports using business tools and applications, cost and economic analysis, and performance metrics to provide recommendations

Financial Management Systems – Utilize integrated federal financial management systems and sub-systems to extract data, identify and resolve system problems, and maintain data integrity

Fundamentals & Operations of Accounting – Research and analyze information related to accounting processes to ensure completeness and accuracy of accounting transactions

Fundamentals & Operations of Budget – Research and analyze information related to the federal budget process to support budget formulation and execution

Fundamentals & Operations of Finance – Research and analyze information related to accounting, auditing, budgeting, or other financial management activities to ensure the accuracy of transactions

Fundamentals & Operations of Military & Civilian Pay – Research and analyze legislative and regulatory guidance related to entitlements to ensure proper payments

Payroll Concepts, Policies, & Principles – Apply military and civilian pay legislation, administrative and regulatory requirements, laws and policies governing military and civilian pay activities and processes

Audit Planning and Management – Evaluates audit programs to ensure an appropriate risk-based audit approach, monitors audit progress, and reviews working papers and audit reports to ensure audits are properly documented and accomplished in accordance with Generally Accepted Government Auditing Standards and Generally Accepted Auditing Standards

Audit Reporting – Analyzes, reconciles, and prepares audit information to produce required audit reports, statements, and other documentation in accordance with Generally Accepted Government Auditing Standards or Generally Accepted Auditing Standards

Decision Support - Audit Execution – Conducts audits in accordance with Generally Accepted Government Auditing Standards or Generally Accepted Auditing Standards to provide value-added recommendations that enable better utilization of resources and improvement of mission effectiveness

Financial Management & Reporting Analysis – Apply financial analysis, forecasting and planning methods, techniques and products sufficient to ensure financial aspects of command forecasts, reports, plans, and strategies are consistent with DoD-wide goals and strategic initiatives

Financial Reporting – Prepare, review, and reconcile financial statements and financial reports to meet reporting requirements and to support management decisions

Financial Stewardship – Manage, allocate, and monitor financial resources in compliance with laws, regulations, and policies, with sufficient transparency and appropriate internal controls to ensure these resources are efficiently applied to meet organizational goals and objectives, while considering the federal government's fiduciary duty to the nation, and to the nation's general welfare

The competencies in green are not included in the DoD FM Certification Program. Senior FM Leaders selected the FM competencies indicated in blue that were most applicable to the entire FM workforce to be incorporated into the DoD FM Certification Program. As stated before, not every member of the FM workforce is expected to be proficient in every competency. Your position and your areas of expertise will determine the competencies on which you will continue to focus your professional development.



As outlined on the previous pages, an FM competency is a functional skill set against which FMers can shape their professional development. DoD FM competencies are rated across five different skill levels from beginner (level 1) to expert (level 5). The table below conveys the responsibilities and expectations at each proficiency level. As you continue in your career you will become skilled in various FM competencies at different proficiency levels based on the requirements of your position.

Proficiency Level	
level 1	Applies the competency in the simplest situations; can name parts, tools, and simple facts/terms about the task; requires close/extensive guidance, and needs to be told or shown how to do most of the task
level 2	Applies the competency in somewhat difficult situations; can do most parts of the task but requires frequent guidance and oversight
level 3	Applies the competency in difficult situations, needing only spot checks; can determine step-by-step procedures for the task; only requires occasional guidance
level 4	Applies the competency in considerably difficult situations and is able to do all parts of the task; requires little or no guidance; able to analyze facts and principles and draw conclusions about the subject/situation
level 5	Applies the competency in exceptionally difficult situations; evaluates conditions and can predict, isolate, and resolve problems; serves as key resource and advises others on how to complete task quickly and accurately

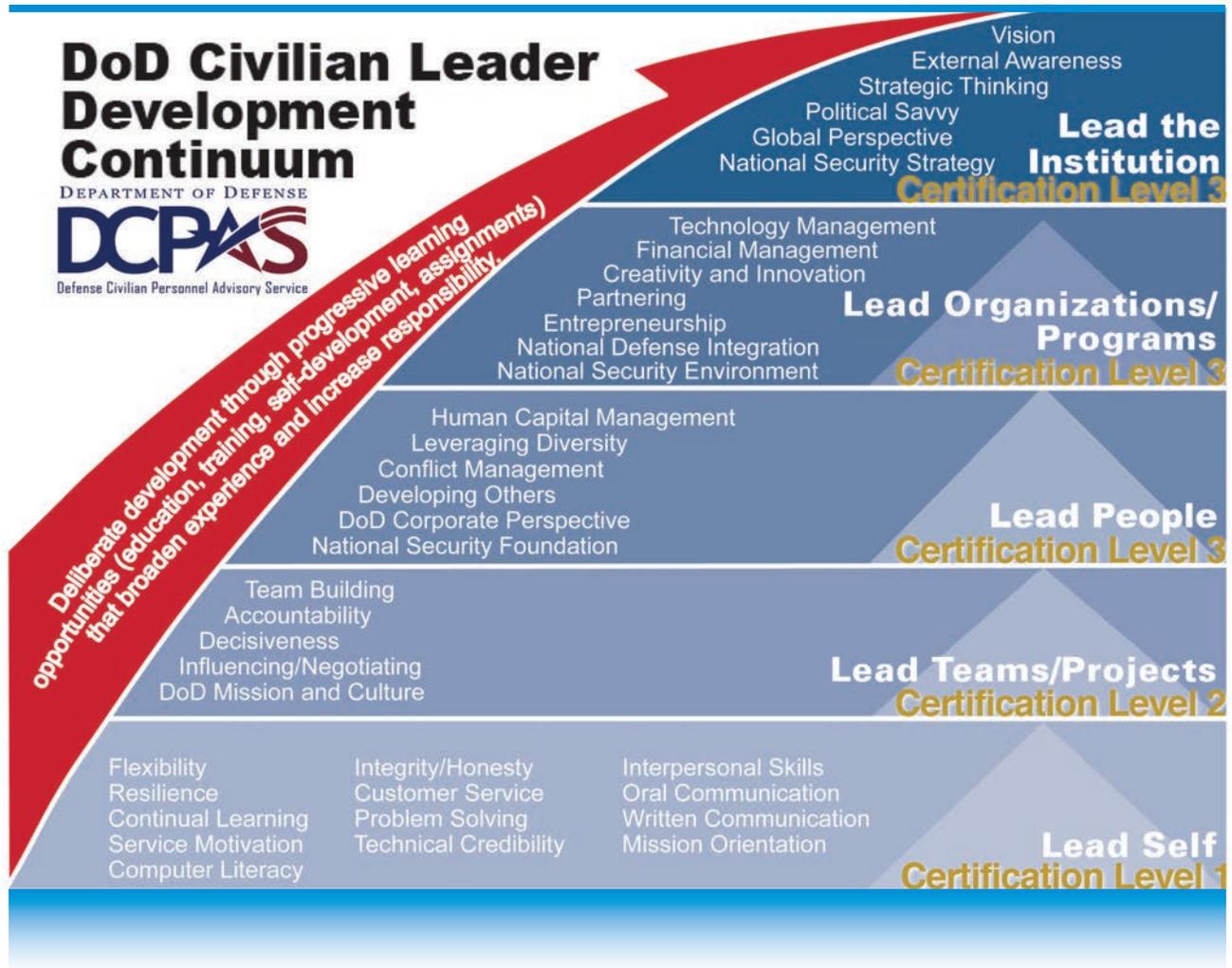
You might be asking how these FM competencies and proficiency levels connect with the Certification Program. The 17 competencies in blue on pages 8 and 9 are the building blocks of the Certification Program and proficiency levels 1, 3, and 5 correlate to Certification Level 1, 2, and 3, respectively.

Certification Level	Proficiency Level
Certification Level 1	Proficiency Level 1
Certification Level 2	Proficiency Level 3
Certification Level 3	Proficiency Level 5

Later in this handbook we will outline all the FM and leadership competency and proficiency level requirements for the three FM Certification Levels. More information on the definitions of all 23 FM competencies, their associated proficiency level, and how they align to the various FM occupational series can be found on FM Online at <https://fmonline.ousdc.osd.mil/FMCompetencies.aspx>.

Leadership Competencies

As noted previously, one of the certification’s primary goals is leadership development across the FM workforce. The DoD FM Certification Program incorporates the already established DoD Civilian Leader Development Continuum into the program’s requirements, using all levels of leadership development as shown below. Each level of the certification requires a certain number of hours dedicated to leadership development.





Certification Requirements Snapshot

Before we dive into the detailed requirements for each level, let's look at the overarching framework of each certification level. Each level requires a certain number of course hours in financial management and leadership development training, specified years of FM experience, as well as standardized training in key areas like audit readiness and fiscal law. At Certification Levels 2 and 3, formal education degrees (bachelor's and master's degrees) are encouraged, along with developmental assignments*. A developmental assignment is generally considered work that is outside of the member's area of expertise. So, for some people, this means that previous work in an area outside of your primary expertise may fulfill this requirement. Additionally, work within the same area of primary expertise may also fulfill the requirement, if it was accomplished at a different organizational level (e.g., budgetary work accomplished at the base/unit level and budgetary work at a headquarters level).

Once you have been notified that you are included in the Certification Program, you will have two years to complete the requirements of your certification level. After you have achieved the appropriate certification level assigned to your position, you will be required to complete a certain amount of continuing education and training (CET) hours every two years.



How can I earn CET credits?

There are several ways to earn CET credits once you have achieved certification. Remember, the purpose of the CET requirement is to ensure you are continuously sharpening your skills through education and training.

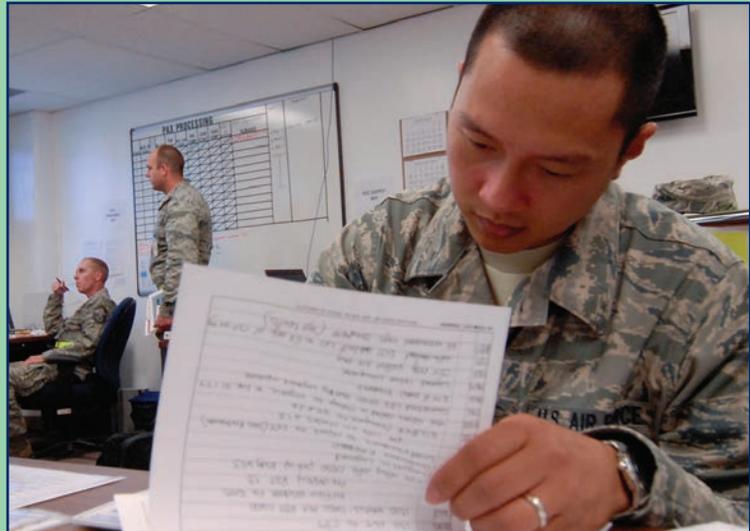
The first way you can earn CETs is by completing any course listed in FM myLearn e-catalog. Each course hour credit is equal to one CET hour.

A second way to earn CETs is through the education and training

you complete to sustain certification in any of the **DoD-approved FM certifications**. These credits can be simultaneously credited to your CET and continuing professional education (CPE) requirements, on a unit-to-unit basis. In other words, if you are a Certified Defense Financial Manager or a Certified Government Financial Manager, etc. and you earn continuing education credit through these programs, those CPEs can also be counted for CETs on a unit-to-unit basis. This includes credits earned by attending FM or leadership-related workshops, seminars, and symposia sponsored by the respective association.

This same policy goes towards those of you who are included in the Defense Acquisition Workforce Improvement Act (DAWIA) program. Your continuous learning points (CLPs) will count as CETs on a unit-for-unit basis.

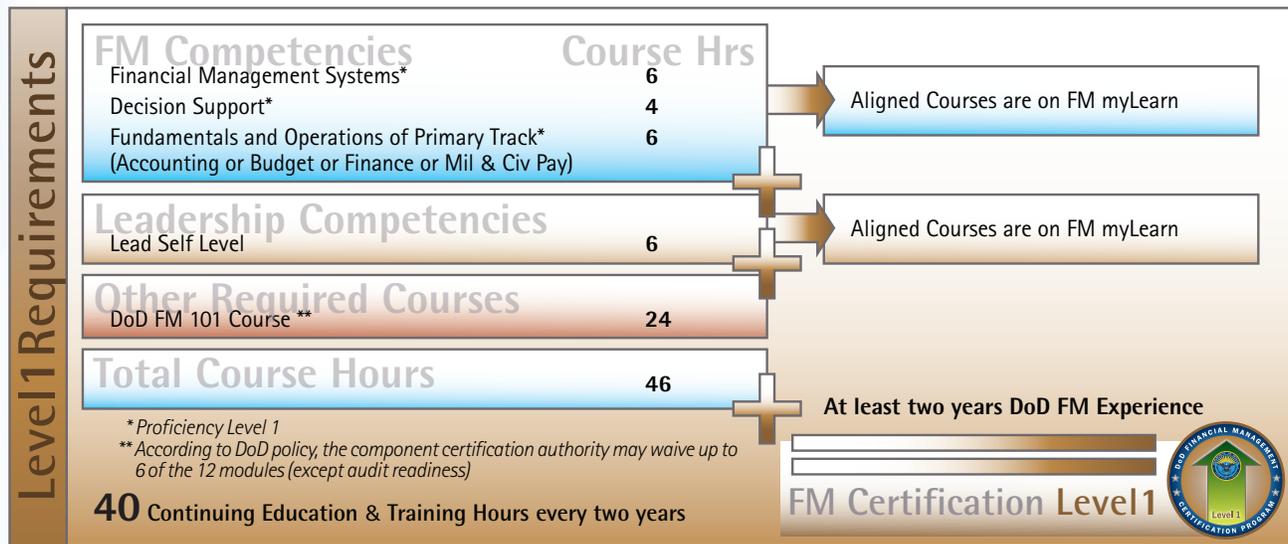
Lastly, if you are taking academic courses, you may count financial management related continuing education units (CEU) credits toward CETs based on the following equation: one CEU equals 10 CETs. CEUs are granted by accredited academic organizations, so refer to your academic institution for additional information.





FM Certification Level 1

Certification Level Requirements



FM and Leadership Competency-based Training

The FM competency-based training required for this level includes training in FM Systems (6 hours), Decision Support (4 hours), and Fundamentals and Operations of your Primary Track (6 hours). Your Primary Track varies depending on your current field—accounting, budget, finance, or civilian and military pay. You can find aligned courses that satisfy these requirements on FM myLearn. For more information on tools and resources, see page 27.

Certification requirements in leadership competencies include 6 hours of education/training in the first level on the DoD Civilian Leader Development Continuum: Lead Self. This leadership level includes training in competencies such as oral and/or written communication, interpersonal skills, customer service, and problem solving (see page 11 for more information).

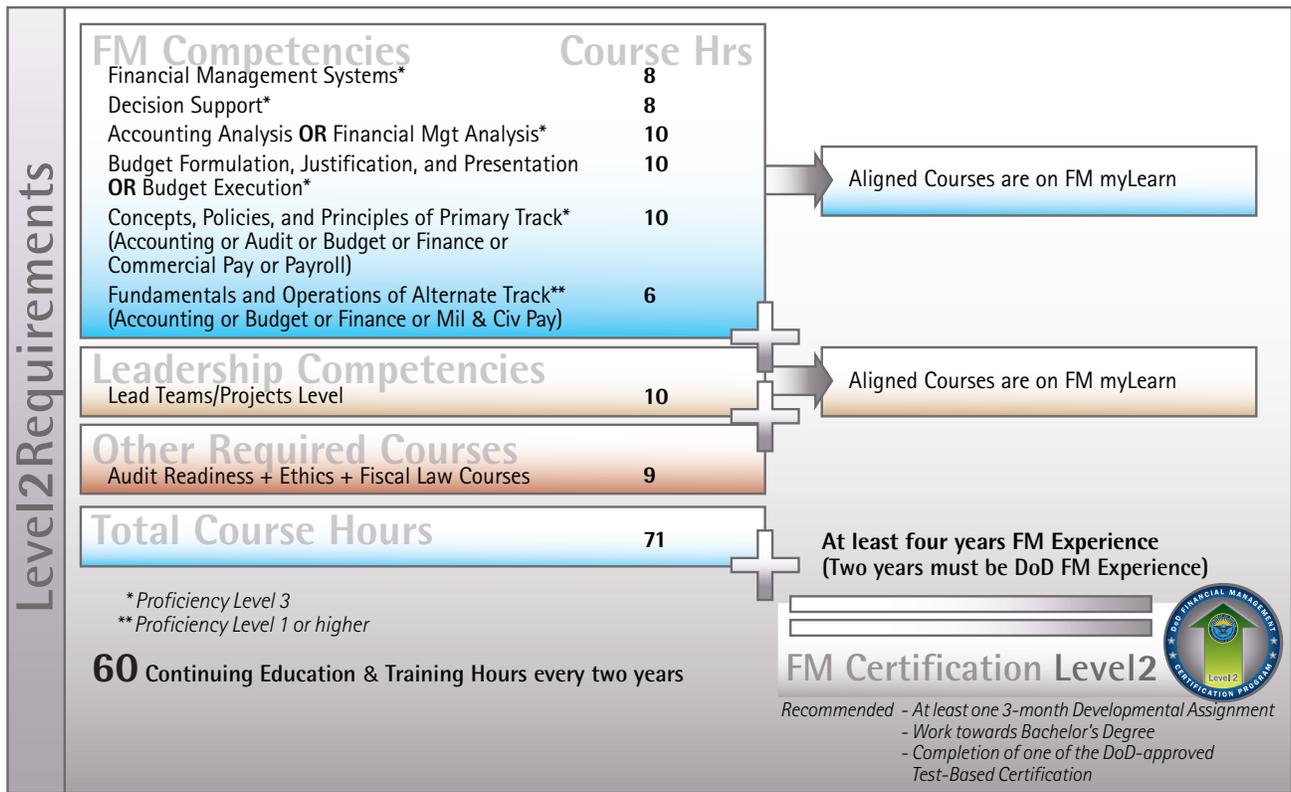
Other Required Courses

In addition to FM and leadership competencies, the Other Required Courses for Certification Level 1 is the DoD FM 101 course consisting of 12 web-based modules. Components may opt to waive up to 6 of the 12 modules; however, the Audit Readiness module is mandatory. Moreover, some organizations have recommended internal courses that their personnel may substitute to satisfy some of the modules. If approved by the OFCM, the authorized substitution courses can be found on FM myLearn. There are 46 total course hours required for Certification Level 1.

Experience and Continuing Education and Training

Lastly, two years of DoD FM experience are required. Individuals have two years to complete the requirements of Certification Level 1, once notified that they are implemented into the program. Upon achieving certification at this level, personnel must complete 40 hours of continuous education and training every two years. If an individual holds some other type of certification that requires on-going training in related areas, that education and training may be used to meet the CET requirement (that is, the same training may satisfy multiple certification requirements).

FM Certification Level 2



FM and Leadership Competency-based Training

The FM competency-based training required for this level includes training in FM systems (8 hours); Decision Support (8 hours); Accounting Analysis OR Financial Management Analysis (10 hours); Budget Formulation, Justification and Presentation OR Budget Execution (10 hours); Concepts, Policies, and Principles of Primary Track (10 hours); and Fundamentals and Operations of Alternate Track (6 hours), where the Alternate Track* represents an area outside of the individual's Primary Track. All required FM training at Certification Level 2 must be aligned at proficiency level 3, except for the training in the Alternate Track, which must be at the proficiency level 1 or higher. Certification requirements for leadership development include 10 hours of education/training in the second level on the DoD Civilian Leader Development Continuum: Lead Teams/Projects. This leadership level includes training in competencies such as team building, accountability, decisiveness, influencing/negotiating, and DoD Mission and Culture.

Other Required Courses

In addition to FM and leadership competencies, *Other Required Courses* for Certification Level 2 include Audit Readiness, Fiscal Law, and Ethics. These are offered in three web-based courses for a total of nine hours of training located on FM myLearn and via the FM Learning Management System. Components may recommend internal courses that their personnel may substitute to satisfy some of the modules. If approved by the FM OFCM, the authorized substitution courses can be found on FM myLearn. There are 71 total course hours required for Certification Level 2.

Experience and Continuing Education and Training

Lastly, four years of FM experience are required, of which at least two years must be in DoD FM. It's important to note that for civilians, prior military experience in financial management does count toward meeting the years of experience requirement. Upon achieving Certification Level 2, individuals are required to achieve 60 hours of continuing education and training every two years. If an individual holds some other type of certification that requires on-going training in related areas, that education and training may be used to meet the CET requirement (that is, the same training may satisfy multiple certification requirements). Recommended at this level, but not mandatory, are a three-month developmental assignment, work toward a bachelor's degree, and completion of a DoD-approved FM certification.

* For example, if your Primary Track is Accounting, then your Alternate Track could be Budget or Finance.



Certification Level Requirements

FM Certification Level 3

FM Competencies	Course Hrs	
Financial Management Systems*	4	Aligned Courses are on FM myLearn
Decision Support*	10	
Accounting Analysis AND Financial Mgt Analysis*	12	
Budget Formulation, Justification, and Presentation AND Budget Execution*	12	
Advanced Financial Management*	12	
Concepts, Policies, and Principles of Alternate Track** (Accounting or Audit or Budget or Finance or Commercial Pay or Payroll)	10	
Leadership Competencies		
Lead People	12	Aligned Courses are on FM myLearn
Other Required Courses		
Audit Readiness + Ethics + Fiscal Law Courses ***	9	At least eight years FM Experience Required (Two years must be DoD FM Experience)
Total Course Hours		
	81	At least one 3-month Developmental Assignment

* Proficiency Level 5
 ** Proficiency Level 3 or higher
 *** Higher Proficiency Level Course

80 Continuing Education & Training Hours every two years

FM Certification Level 3

Recommended - Work towards Master's Degree
 - Completion of one of the DoD-approved Test-Based Certification

FM and Leadership Competency-based Training

The FM competency-based training required for this level includes training in FM Systems (4 hours); Decision Support (10 hours); Accounting Analysis AND Financial Management Analysis (12 hours); Budget Formulation, Justification and Presentation AND Budget Execution (12 hours); Advanced Financial Management (12 hours); and Concepts, Policies, and Principles of Alternate Track (10 hours). There are a couple of distinctions from the Certification Level 2 requirements. While Certification Level 2 allows the individual to choose training from multiple competencies, Certification Level 3 requires training in each of the competencies listed. If the competencies are joined by “AND,” at least one-third of the required training in that category must be in one of those competencies, with the balance in the other. Certification Level 3 does not require training in the Primary Track. Individuals at this level are assumed to have sufficient expertise in their Primary Track, so that competency is not included. Also, all of the FM training required at Certification Level 3 must be aligned at proficiency level 5, except for training in the Alternate Track, which may be at the proficiency level 3, or higher.

Certification requirements in leadership development include 12 hours of education/training in any of the top three levels on the DoD Civilian Leader Development Continuum: Lead People, Lead Organizations/Programs, or Lead the Institution. Leadership development at these levels includes training in competencies such as human capital management, leveraging diversity, conflict management, developing others, the DoD Corporate Perspective, and National Security Foundation.

Other Required Courses

In addition to the FM and leadership competency-based training, Other Required Courses for Certification Level 3 include Audit Readiness, Fiscal Law, and Ethics. These courses are taught at a higher level of learning than the courses in the same topics at Certification Level 2. Again, organizations may recommend internal courses their personnel may substitute to satisfy some of the courses. If approved by the FM OFCM, the authorized substitution courses can be found on FM myLearn. There are 81 total course hours required for Certification Level 3.

Experience and Continuing Education and Training

Additionally, eight years of FM experience are required, of which at least two must be in DoD FM. Certification Level 3 also requires completion of a developmental assignment of at least three months. Previous work may be used to satisfy this requirement. For example, if someone is currently working in the budget discipline, but previously worked in accounting, financial services, or in another field outside of FM (for example, program management, manpower, personnel, contracting, logistics), then he or she will be deemed to have met the intent of the developmental requirement. Additionally, even if someone has worked in one area for an entire career but has experience at multiple organizational levels such as installation, major command, or headquarters, he or she likely will have met the developmental assignment requirement. The Department has developed overarching guidance regarding the kind of experience that constitutes a developmental assignment, and, as noted before, organizations may choose to develop supplemental guidance that further defines what developmental assignments mean for their organization.

Upon achieving Certification Level 3, individuals are required to achieve 80 hours of continuing education and training every two years. If an individual holds some other type of certification that requires on-going training in relevant areas, that education and training may be used to meet the CET requirement (that is, the same training may satisfy multiple certification requirements). Strongly recommended at this level, but not mandatory, are work toward a master's degree and completion of a DoD-approved FM certification.





DoD FM Certification: What You Need to Do

Listed below are a few items to help you get started when your organization is implemented into the Certification Program.

If I am an FM Member

- Watch the Overview Videos located on FM Online to understand the Certification Program's background and key elements to success. Once you understand the basics of the Certification Program, set up a meeting with your supervisor to discuss certification requirements and identify your Primary and/or Alternate Tracks. For assistance with this task, view the video "Choosing Primary and Alternate Tracks in the DoD FM LMS" located at FM Online.
- Watch and complete the Practical Exercise video. The Practical Exercise follows "Kelly," a GS-14 accountant, who occupies a position designated at Certification Level 3, as she reviews her completed education and training and applies it to DoD FM Certification Program requirements.
- Fill out your Learning History Worksheet as discussed in the Practical Exercise video to identify where you need more training to fill gaps in certification requirements. Download your Learning History Worksheet at <https://fmonline.ousdc.osd.mil/LMS/Forms.aspx>.
 - a. Collect documentation as outlined in the Practical Exercise video.
 - b. If you have completed FM or leadership academic courses and would like to use those courses to satisfy initial certification requirements, see Appendix A on page 22 for an overview of how to use the Academic Matrices.
 - c. If you have completed other kinds of FM or Leadership education or training that you cannot locate within the FM myLearn website, review the Course-to-Competency Alignment Process outlined in Appendix B on page 24 to learn how to submit courses for program inclusion.
- Sit down with your supervisor to review Learning History Worksheet and develop a plan to achieve certification requirements.
- Once your organization has implemented the Certification Program, use the FM LMS to document your completed certification requirements, or "achievements":
 - Complete the Three-step Process as you satisfy certification achievements. For more information on the Three-step Process, view the "Three-step Process" video on FM Online.
- Once you've completed all the requirements, or "achievements," at your level, you will request approval of your FM Certification by using the Three-step Process referenced on the next page. The FM LMS will automatically route your request to your supervisor, then the Approver Level 2 (A2), if appropriate, and your organization's Component Certification Authority (CCA) for final approval.

1 RECORD LEARNING FOR ACHIEVEMENT
 Using the information from your Learning History Worksheet, Record Learning* for all items 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. This is the only time you will need to upload documentation.

3 REQUEST ACHIEVEMENT APPROVAL
 Record Learning* for the appropriate achievement item to request supervisor approval.
 Repeat this Three-step Process for each achievement in the FM LMS until all certification requirements are met.

+ COMPLETE OTHER REQUIRED COURSES
 Level 1: DoD FM 101 Course
 Levels 2 & 3: Audit Readiness, Ethics & Fiscal Law
*These courses are available within the FM LMS and via FM myLearn.***

Approved substitution courses are listed on FM myLearn.

✓ REQUEST CERTIFICATION APPROVAL
 Check that the Three-step Process is complete for each certification requirement.
 Record Learning* for your certification level to request approval from your Component Certification Authority.

If I am a Supervisor

- Identify all the FM members you supervise for the DoD FM Certification Program.
- Review the supervisor responsibilities outlined in DoD Instruction 1300.26 and complete the supervisor-specific training located on your Learning Plan within the FM LMS.
- Meet with your staff to review their Learning History Worksheets, discuss certification requirements, and help them identify the most appropriate Primary and/or Alternate Track. For assistance with this task, watch the video "Choosing Primary and Alternate Tracks in the DoD FM LMS" located on FM Online.
- Work with the individuals on your team to develop a plan to achieve certification requirements within the allotted timeframe and to document their certification achievements using the FM LMS.
- You are responsible for reviewing and approving/denying achievements submitted by your team via the FM LMS. Refer to the "How to Approve a Completed Certification Requirement in the DoD FM LMS" Job Aid to help you accomplish this task.
- Once an individual has met all the requirements or "achievements" for a certification, you are responsible for recommending approval or disapproval of a request for FM Certification using the FM LMS. Use the Job Aid "Guidance for Supervisors to Review Requests for Certification" for step-by-step instructions on how to use the Scorecard Report to verify accuracy and completeness of certification requirements.
- Your recommendation will filter up to the A2, if applicable, and to the CCA. For more information on how to complete other supervisory roles within the FM LMS, view the Job Aids listed under "Supervisor/A2/CCA" on FM Online.
- Celebrate success as your team members achieve this important career milestone!

* To accomplish this task, use the "Record Learning" link located under Easy Links within the FM LMS.
 ** If completing a course via FM myLearn, you must follow the Three-step Process to document course completion inside the FM LMS.



Other Key Players

You and your supervisor will be working in lock-step to establish a plan for completing the FM certification requirements of your positions. However, within each organization, there are other key players who are pivotal to your success in the DoD FM Certification Program. You may not interact with them every day, but the work they are doing keeps the Certification Program moving forward.

Component Administrator (CAs)

Component Administrators are selected by each Component to provide administrative support within the FM LMS. CAs will be available to assist users in navigating and troubleshooting issues in the FM LMS.

Course Manager (CM)

As new financial management or leadership courses are developed, each organization has designated a Course Manager who is responsible for requesting that new courses be aligned to the DoD FM Certification Program. The Course Manager is responsible for collecting, reviewing, submitting, and tracking their organization's course alignment requests sent to the Governing Body.



Component Certification Authority (CCA)

The final approval authority for each organization is the CCA. Depending on your organization, there may be more than one CCA. The CCA is ultimately responsible for the final approval of a request for certification and will ensure the validity of all information provided by the user for certification. In light of their important role, we developed a Scorecard Report to help them do the following:

- Identify whether an FM member has completed all the requirements in the FM LMS.
- Review to uploaded documentation.
- Quickly review the FM member's comments, e.g., when a member uses an academic course to meet certification requirements.

Component Certification Authorities are encouraged to use the Scorecard Report available through the FM LMS to review certification approval requests for completeness and accuracy. Use the step-by-step Job Aid entitled *FM Certification CCA Guidance* at <https://fmonline.ousdc.osd.mil/LMS/JobAids.aspx> to learn how to use the Scorecard Report effectively.

Approver Level 2 (A2)

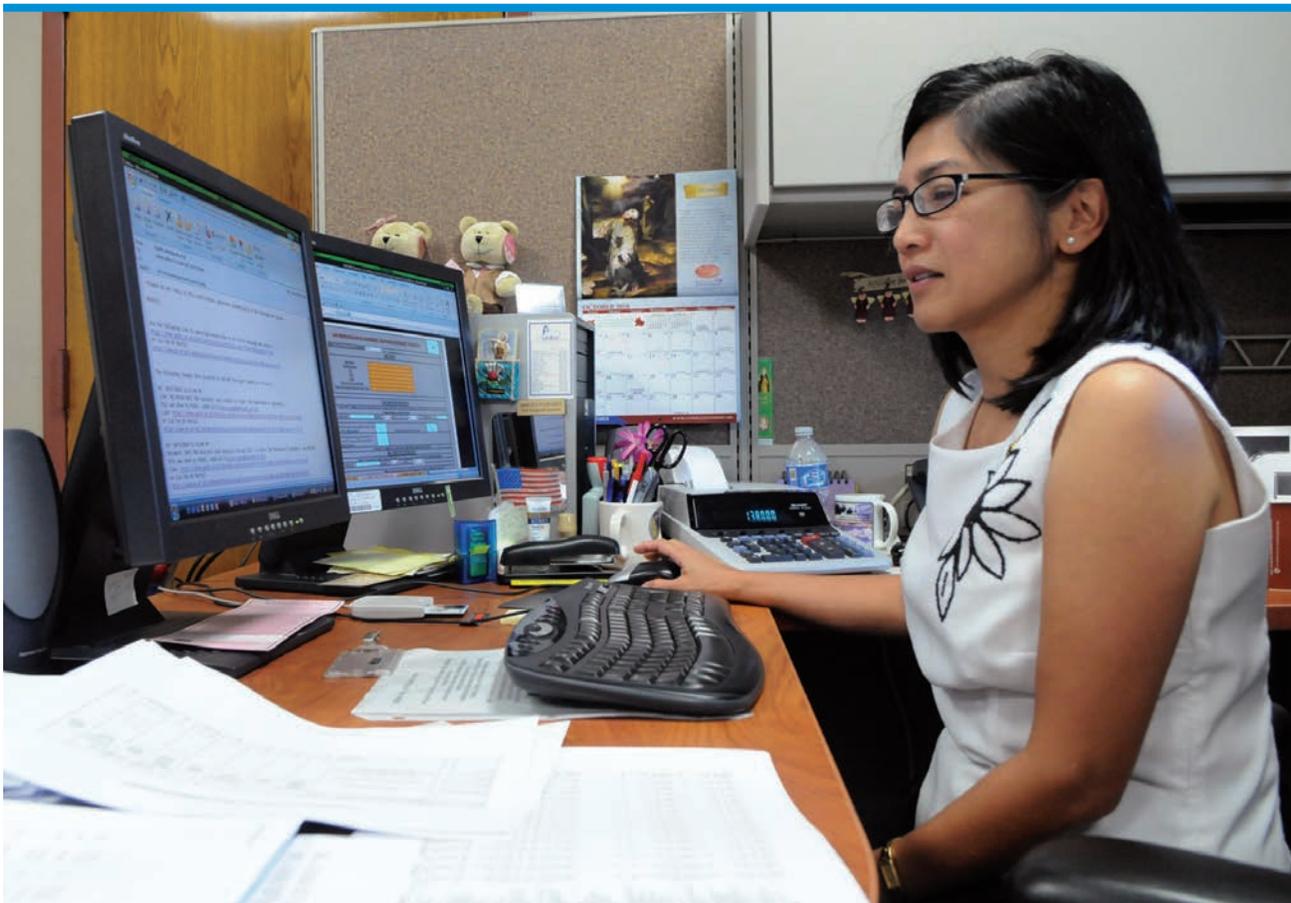
Organizations may choose to appoint A2s to serve at the organizational level to ensure that requests for certification are complete before sending them forward for final approval by the CCA.

What About DAWIA?: FM Certification and Acquisition

If you've already completed your Defense Acquisition Workforce Improvement Act (DAWIA) Certification, Congratulations! We recognize your hard work in becoming credentialed in the acquisition community and although the DoD FM and DAWIA Certifications are not fully reciprocal, we've teamed with the acquisition community to create a curriculum that leverages FM training taken for the DAWIA certification.

If you are assigned a position that requires DoD FM Certification and DAWIA Business FM, Business Cost Estimating, or Auditing, you'll need to complete both the DoD FM Certification and the Acquisition Certification requirements. The good news is that many of the requirements for the DAWIA Certification will fulfill FM Certification Program requirements.

You will be able to obtain the DoD FM Certification by completing only the additional training not covered in DAWIA acquisition training. In order to take advantage of the reduced FM Certification curriculum, you must first complete the DAWIA Certification. You may apply for a time waiver for the FM Certification while you are completing DAWIA requirements, if applicable. For more information about FM Certification requirements for DAWIA-coded positions, refer to DoD Instruction 1300.26.





Appendix A: How to Use the Academic Matrices

Many of you have completed academic courses in financial management or leadership-related subjects from accredited colleges and universities and have asked if these course hours can be used to satisfy initial certification requirements. In general, the answer is “Yes” if it properly aligns to DoD FM Certification Program requirements at your certification level. It is up to you to review your coursework using the academic matrices to identify courses that may be applicable to the Certification Program. Then, within the FM LMS, your supervisor and ultimately your Component Certification Authority must validate the applicability and approve the request. To determine if your course work is applicable for credit toward certification, compare your course names and levels on your transcript to the information found in the FM and Leadership Academic Matrices.

For a full explanation of how to use the academic matrix to obtain credit for college courses in the DoD FM Certification Program, watch the [Practical Exercise](#) video available on [FM Online](#). This article provides five basic steps for using the academic matrices to make that determination.

Step 1. After you have collected academic transcripts from your college or university, review your transcript and highlight courses in financial management and leadership subject areas, as these courses may potentially apply toward certification.

Step 2. Next, you should only focus on courses that correspond to the certification level required for your current position. For Certification Level 1, you’ll need to focus on courses taken at the 1XX (or 1XXX) to 2XX (or 2XXX) level of an undergraduate degree. For example, course hours from a class titled “Accounting 101” or “Accounting 2001” in an undergraduate program align to FM Certification Level 1.

Step 3. Use the title of the course to identify which competency the course may be credited. For example, if the course title includes the phrase “Decision Analytics” your course would likely apply to the Decision Support competency. The FM Academic Matrix is divided into separate pages for each FM Competency including information for all three certification levels; whereas, the Leadership Academic Matrix is divided into separate sections by leadership competency levels that satisfy requirements for each certification level.

FM Academic Matrix

Accounting Concepts, Policies & Principles			
Accounting Concepts, Policies and Principles	Parameters	Academic Courses	
		Course Level	Sample Course Titles
PL 1 (FM Certification Level 1) Identify Applicable Accounting Policies & Procedures Describe & Apply Accounting & Financial Procedures & Principles Perform Basic Research on Accounting & Financial Procedures & Principles		Lower Division - Undergraduate (1000 – 2000 level)	<ul style="list-style-type: none"> Advanced Financial Accounting Cost Accounting for Strategic Management Accounting Systems Federal Accounting Standards & Theory I Financial Accounting & Reporting I Financial Accounting & Reporting II Financial Accounting Standards & Theory II Intermediate Accounting Theory and Contemporary Issues in Accounting
		Upper Division - Undergraduate (3000 level)	
PL 2 (FM Certification Level 2) Develop Accounting SOP or Policies & Procedures Doc. IAW USSSL Analyze & Review Accounting & Financial Procedures & Principles Test & Validate Internal Controls Interpret Impacts of Accounting & Financial Procedures & Principles		Senior Upper - Division Undergraduate and Graduate (4000 and higher level)	
PL 3 (FM Certification Level 3) Formulate & Evaluate Accounting Policy Recommend Solutions & Implement Decisions on Accounting & Financial Procedures & Principles			

Leadership Academic Matrix

FM Certification Level 1: LEAD SELF		
Competencies	Academic Courses	
	Course Level	Sample Course Titles
Computer Literacy	Lower Division - Undergraduate (1000 – 2000 level)	<ul style="list-style-type: none"> Introduction to Computers and Computing Computer Literacy
Continual Learning	Lower Division - Undergraduate (1000 – 2000 level)	<ul style="list-style-type: none"> Self-Improvement Academic Survival Self Evaluation/Self Awareness
Customer Service	Lower Division - Undergraduate (1000 – 2000 level)	<ul style="list-style-type: none"> Essentials of Communication
Flexibility	Lower Division - Undergraduate (1000 – 2000 level)	<ul style="list-style-type: none"> Dealing with Difficult People
Integrity/Honesty	Lower Division - Undergraduate (1000 – 2000 level)	<ul style="list-style-type: none"> Ethical Leadership Skills Workplace Ethics
Interpersonal Skills	Lower Division - Undergraduate (1000 – 2000 level)	<ul style="list-style-type: none"> Introduction to Interpersonal Communication Essentials of Communications Negotiation

Step 4. Once you have determined that you have an applicable course, you need to figure out the course hour value as it relates to the program. Since most academic institutions use semester or quarter hours, you can use the Course Hour Conversion Chart to the right to determine the course hour value in the DoD FM Certification Program.

Step 5. Finally, after you have determined which academic courses are applicable to certification requirements and have determined how many course hours it provides, you will follow the Three-step Process in the DoD FM LMS to record learning for this achievement.

As you complete the Three-step Process (page 19) and begin to record learning in the FM LMS, here are a few helpful tips to help you navigate the process smoothly:

Academic Course	Course Hours
3 Semester Hours	45
2 Semester Hours	30
1 Semester Hour	15
5 Quarter Hours	50
4 Quarter Hours	40
3 Quarter Hours	30
2 Quarter Hours	20
1 Quarter Hour	10

- Note key information in your comments (course title, course number, and applicable competency requirements). Your approver should be able to easily identify which course is being used to satisfy a requirement then identify it in the academic matrices.
- Keep course information on-hand. In cases where your supervisor or CCA does not agree with your recommended use of a course, you may be asked to provide a course description or syllabus for more information.
- CCAs may submit additional academic courses to the FM Certification Team. There may be some cases in which the course title is not clearly a similar match to the example course titles provided in the academic matrix, but the course’s learning objectives clearly align with the example parameters under a given competency. In these situations, your CCA will review your recommendation and if he or she agrees, the CCA will submit the course to the FM Certification Team as a potential addition to the academic matrix.
- Review courses with your supervisor before submitting the achievement for approval in the DoD FM LMS. Doing this ensures that your supervisor agrees that your courses are applicable and is familiar with your recommendations if your CCA has any questions.

For questions on this process, contact the DoD FM Certification Team at dodfmcertificationprogram@mail.mil.



Appendix B: Course-to-Competency (C2C) Alignment Process

If you have successfully completed education or training that you cannot find listed on the FM myLearn e-catalog, you may follow this process to see if it is applicable to the Certification Program. To do this, follow the simple process below.

1. Fill out the Course Submission Template found at <https://fmonline.ousdc.osd.mil/LMS/Forms.aspx>
2. Submit it to your organization's Course Manager*

Once you've filled out the Course Submission Template and submitted it to your organization's Course Manager, he or she will compile submitted responses and deliver them to the Governing Body for review. Once the Governing Body has reviewed the course information and determined if it is applicable to Certification Program requirements, they will return it to the proper point of contact who will align it to the FM or Leadership competencies and proficiency levels. After the course is properly aligned, it will appear in FM myLearn and the FM LMS for you to select.

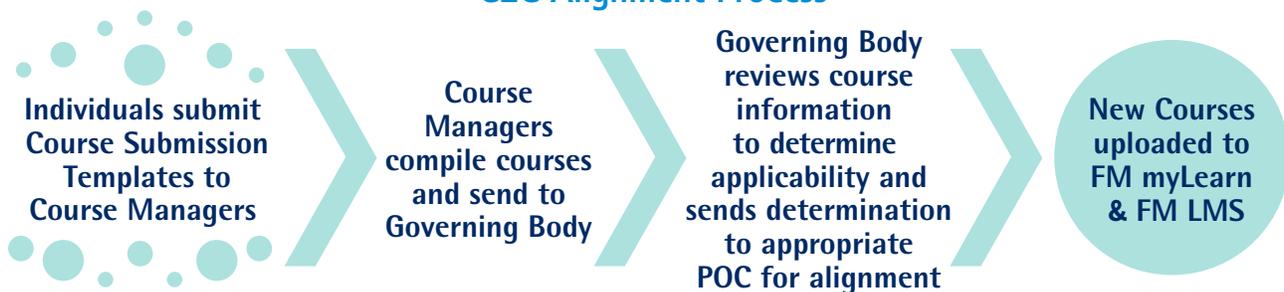
*See page 20 for more information about Course Manager responsibilities.

Many people are wondering if they can apply prior education and training hours toward meeting certification requirements. The answer is YES. Courses included in the FM LMS are:

- DoD Active Courses
- Inactive DoD Courses
- FM and Leadership Academic Courses
- Active and Inactive Commercial Courses

As you collect your training records and begin to identify courses not already in the FM LMS, record these courses and follow your Component's process for submitting these courses to the Governing Body. Remember, there's no need to document EVERY training course or class you've ever taken – only what is necessary for you to meet your certification requirements.

C2C Alignment Process



Appendix C: Key Websites

FM Online – <https://fmonline.ousdc.osd.mil>

FM Online is your gateway to a variety of DoD FM resources including FM myLearn, the DoD FM LMS, and DoD FM Policy. On the home page you'll find the quarterly FM Certification newsletter and along the left navigation panel you'll find a link labeled DoD FM Certification Program – this is exactly what you think it is: a compilation of all the information you've just read about, plus a downloadable version of this handbook. It hosts links to the FM Certification requirements for each level and downloadable resources such as a video series that provides an overview of the program as well as instructional videos aimed at teaching viewers how to complete specific actions inside the FM LMS.

FM myLearn – <https://fmonline.ousdc.osd.mil/FMmyLearn>

FM myLearn is a comprehensive e-catalog of FM training and professional development opportunities from across DoD Services, agencies, and schools. This site features a search engine that allows users to search for courses based on the following criteria:

Certification Level	Delivery Method	Subject Area
FM Competency	FM Proficiency	Leadership Competency

FM myLearn provides detailed course descriptions, competency alignments, and links to registration sites. FM myLearn is your primary resource for identifying courses that satisfy Certification Program requirements. Watch the video entitled *Your Success with FM Online, FM myLearn and the FM LMS* to learn how to use these websites to develop your path for certification.

Financial Management Learning Management System (FM LMS) – <https://whs.plateau.com/learning/user/ssoLogin.do>

The DoD FM LMS is a web-based application that is used by the FM workforce to record and track accomplishments against the overarching FM Certification Program requirements. All FM personnel will use the FM LMS to document satisfied certification requirements and supervisors, A2s, and CCAs will use it to validate the information provided and, finally, to award certification. The FM LMS is pre-loaded with:

- FM personnel information including FM certification level requirements based on personnel data system feeds
- FM and Leadership courses aligned to FM competencies required for each certification level
- Other Required Courses (i.e. DoD FM 101, Audit Readiness, Fiscal Law, and Ethics web-based training)
- Academic courses aligned to both FM and leadership competencies for each certification level
- Other OUSD(C)-developed web-based trainings

Department of Defense Instruction (DoDI) 1300.26 – "Operation of the DoD Financial Management Certification Program": <http://www.dtic.mil/whs/directives/corres/pdf/130026p.pdf>

This instruction establishes policy, assigns responsibilities, and outlines how to achieve FM Certification. Additionally, it provides guidance on:

- Official designations awarded for achieving FM Certification
- Requirements for FM and Acquisition-coded FM members
- FM governance structure at each organizational level

If you have any specific policy and/or procedural questions, first contact your organization's FM Certification Program point of contact. For general questions, contact the DoD FM Certification Team at dodfmcertificationprogram@mail.mil.



Appendix D: Additional Resources

If I need help with...

Understanding the Certification Program

- How does the Certification Program affect me?
 - Review the items listed under “Get Familiar” on page 27 and set up a meeting with your supervisor.
- How is the Certification Program being implemented at my organization?
 - Contact your organization’s certification POC listed at https://fmonline.ousdc.osd.mil/FMCertProgram/FM_CertProg_POC.aspx

Finding or Aligning Courses to my Certification Requirements

- Where can I find courses that meet DoD FM Certification Program requirements?
 - Log on to FM myLearn and search by competency or course level.
- How can I determine if a course on my transcript applies to the DoD FM Certification Program?
 - Use the academic matrices (more information on page 22) and set up a meeting with your supervisor.
- I have a course in my learning history that is not included in FM myLearn. How do I know if it applies to certification requirements?
 - Set up a meeting with your supervisor to determine if that course should be submitted to the Course Manager via the C2C Alignment Process (see page 24) to determine if it is applicable to the program.

The FM LMS

- I’m having technical issues.
 - Contact the FM LMS Helpdesk at 1-800-735-1236 or via email at FMLMShelpdesk@gpstrategies.com. If you have additional questions, contact your Component Administrator.
- I need help understanding how to navigate the FM LMS.
 - Watch the overview video entitled Introducing the DoD FM LMS followed by the How to Login to and Navigate the DoD FM LMS video. After you’ve familiarized yourself with the system, use the FM LMS Job Aids for step-by-step instructions to complete the Three-step Process to Record Learning for each satisfied requirement.

If you have additional questions about the Certification Program, visit FM Online to view the list of [Frequently Asked Questions](#). If you need additional information, contact your supervisor or organization’s certification POC with questions related to your organization’s implementation. For general questions, you may contact the DoD FM Certification Team at dodfmcertificationprogram@mail.mil.

As you work toward meeting certification requirements use the tools listed in Appendix E to help you plan your pathway to earning your certification.

Appendix E: Tools to Help Your Path to Certification

As members across the Department continue to check off certification requirements, the FM Certification Team is here to support your effort. Outlined below are tools and resources to help you on the path toward certification. Download these items from [FM Online](#). Click on each image below to view these resources.

GET FAMILIAR



These overview and instructional training videos provide you with a basic understanding of the DoD FM Certification Program, its requirements, and associated resources to include FM Online, FM myLearn, and the DoD FM Learning Management System.

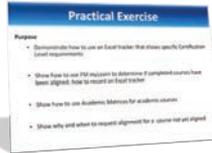


These datasheets outline the requirements for each level and provide additional need-to-know information on the back.



This tool defines each of the 17 FM competencies associated with the Program and provides examples of what kind of performance is expected at each proficiency level.

GET ORGANIZED



The Practical Exercise follows “Kelly,” a GS-14 accountant, who occupies a position designated at Certification Level 3, as she reviews her completed training and applies it to the certification requirements.



Use these Learning History Worksheets to organize your prior education and training and identify where you need more training to fill gaps in certification requirements.



The FAQ document is home to over 100 questions about the DoD FM Certification Program. Use this document to research your question before contacting your supervisor or the DoD FM Certification Team.

GET STARTED



The LMS User Quick Guide provides a list of easy actions you can take to get started using the FM LMS.



The LMS Job Aids provide step-by-step instructions for all FM LMS Tasks.



Join the LinkedIn discussion group to keep up with new resources such as newly released web-based training, lessons learned, and ask questions of peers and the DoD FM Certification Team.



Acronyms/Index

Acronyms

A2 – Approver Level 2
 AT&L – Acquisition, Technology, & Logistics
 C2C – Course-to-Competency
 CAs – Component Administrators
 CCA – Component Certification Authority
 CET – Continuing Education and Training
 CFCM – Component Functional Community Manager
 CFO – Chief Financial Officer
 CLP – Continuous Learning Point
 CM – Course Manager
 CPE – Continuing Professional Education
 DAWIA – Defense Acquisition Workforce Improvement Act
 DCAA – Defense Contract Audit Agency
 DFAS – Defense Finance & Accounting Service
 DISA – Defense Information Systems Agency
 DLA – Defense Logistics Agency
 DoD – Department of Defense
 FIAR – Financial Improvement and Audit Readiness
 FM – Financial Management
 FM LMS – Financial Management Learning Management System
 FY – Fiscal Year
 NDAA – National Defense Authorization Act
 OFCM – Office of the Secretary of Defense Functional Community Manager
 OSD – Office of the Secretary of Defense
 OUSD – Office of the Under Secretary of Defense
 PDS – Personnel Data System
 OUSD(I) – Office of the Under Secretary of Defense for Intelligence
 USD(C) – Under Secretary of Defense (Comptroller)

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Points of Contact

Click on the link below to identify your DoD FM Certification primary point of contact:

https://fmonline.ousdc.osd.mil/FMCertProgram/FM_CertProg_POC.aspx

