

EDUCATION PORTAL GUIDE

California Debt and Investment Advisory Commission

Welcome to the California Debt and Investment Advisory Commission's (CDIAC) [Education Portal](#) (Ed Portal) Guide. The Ed Portal houses training for California's public finance professionals. Whether new to the field or an established expert, the Ed Portal has resources for you.

This guide is intended to serve as your comprehensive resource to navigating CDIAC's Ed Portal. Use the table of contents below to get started.

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Introduction to the Ed Portal

The Ed Portal houses original programs and webinar replays curated by CDIAC, in partnership with experts across the public finance field. Programs viewed in the Ed Portal can qualify for continuing education credits and a certificate is issued upon completion of a course. Programs are organized into three categories: Elect>Ed, Invest>Ed, and Debt>Ed.



EDUCATION FOR ELECTED OFFICIALS

Education focused on public debt financing for locally elected officials and members of governing bodies. These modules help inform public officials about the process of public debt financing.



MUNICIPAL DEBT ISSUANCE EDUCATION

Education focused on important public debt issuance topics. These webinar replays cover a range of topics including the fundamentals of debt issuance, green bond issuance, and climate change disclosure.



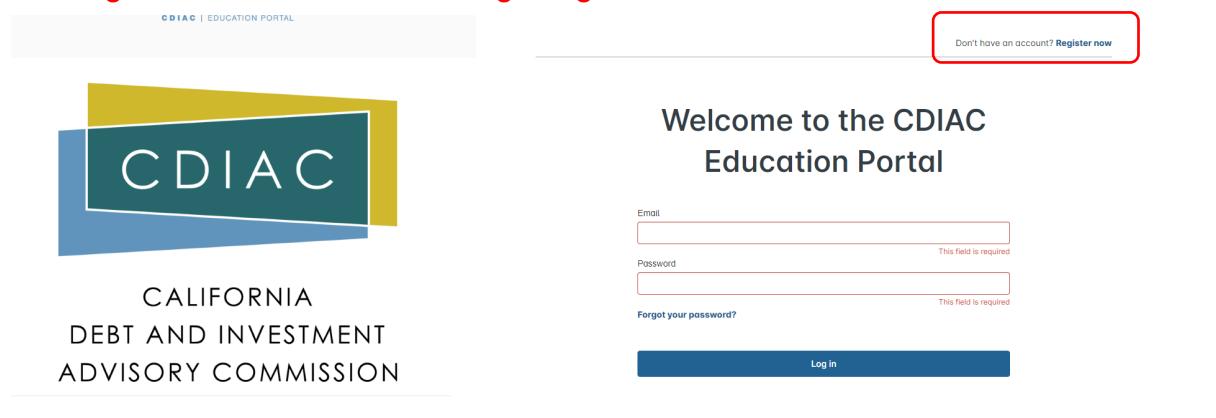
PUBLIC FUND INVESTMENT EDUCATION

Education focused on important public fund investments topics. These webinar replays cover a range of topics including the fundamentals of public fund investing and socially responsible investing.

CREATING YOUR ACCOUNT

To access [CDIAC's Ed Portal](#), you must register an account. Follow the steps below to do so. Note that users must login at least once every six months to maintain their account, or they will be deemed inactive and have their account disabled.

1 Click on "Register Now" on the Ed Portal Login Page



CDIAC | EDUCATION PORTAL

Don't have an account? [Register now](#)

Welcome to the CDIAC Education Portal

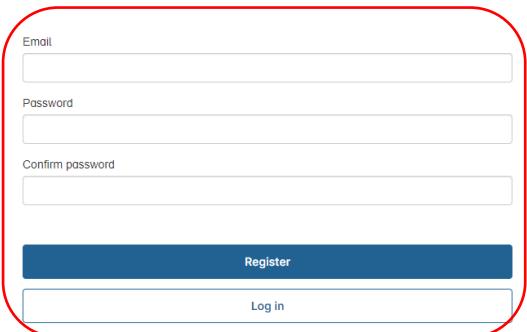
Email This field is required

Password This field is required

[Forgot your password?](#)

[Log in](#)

2 Enter your email and desired password



Register for CDIAC

Email

Password

Confirm password

[Register](#)

[Log in](#)

3 Accept CDIAC's terms and conditions



Terms

By selecting the Accept button, I acknowledge the content contained in this portal is designed to provide accurate and authoritative information in regard to the subject matter covered; it has been provided with the understanding that neither the presenters nor CDIAC are engaged in rendering debt management, municipal finance, investment, accounting, legal, or other professional services. Educational content should not be construed as providing legal or financial advice or opinions on any specific facts. Participants should consult appropriate professional advisors if such services are sought. Participants should note that each public agency is unique, and while educational content can be of use to various types of public agencies not everything contained in this portal is applicable to every public agency.

I further acknowledge that I can contact CDIAC at CDIAC_Education@treasurer.ca.gov or (916) 653-3269 if disability accommodations are needed to access content in this portal.

[Accept](#) [Decline](#)

4 Check your email for a registration confirmation with the subject "CDIAC Confirmation instructions"



Confirmation email sent to [\[redacted\]](#)

Welcome

You can confirm your account through the link below:

https://edportal.treasurer.ca.gov/users/confirmation?confirmation_token=DQ8EF6fAyTongCUKkiA0g

Regards,
CDIAC Education Portal.

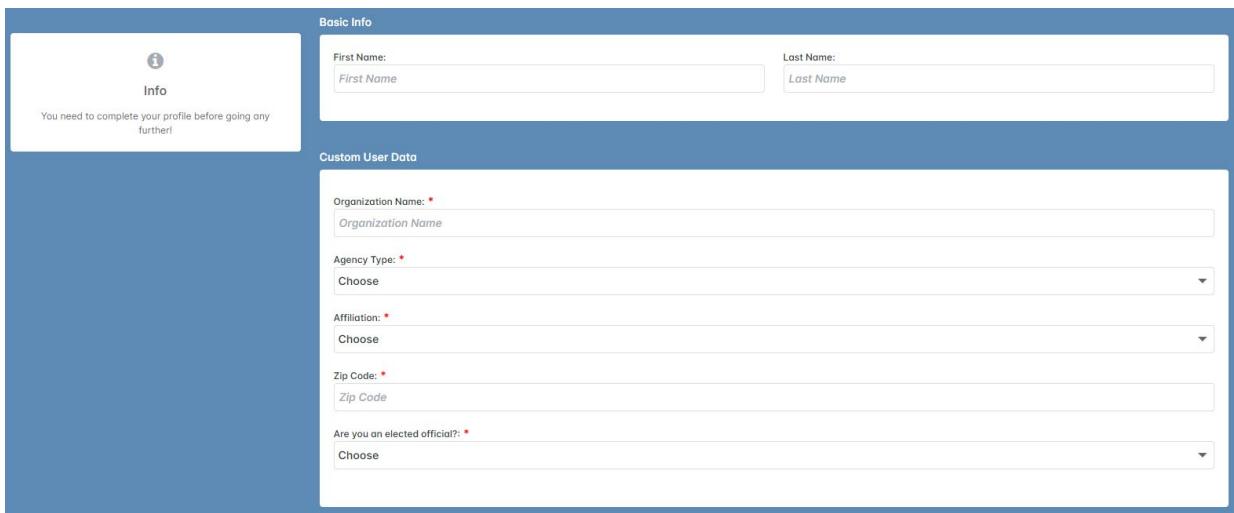
You might also consider adding notifications@advancedproblemsolving.org to your safe-senders/contacts list so as to prevent our emails going to your spam folder.

[Log in](#) or [Register with a different email](#)

CREATING YOUR ACCOUNT

Continued

5 Enter your profile information



The screenshot shows the 'Basic Info' and 'Custom User Data' sections of a web form. The 'Basic Info' section contains fields for 'First Name' and 'Last Name'. The 'Custom User Data' section contains fields for 'Organization Name', 'Agency Type', 'Affiliation', 'Zip Code', and 'Are you an elected official?'. Each field is accompanied by a placeholder text and a dropdown menu for selection.

**** Note that your full name and organization will be present on your certificates of attendance**

6 You are now a registered user of CDIAC's Education Portal!



CDIAC Education Portal <notifications@advancedproblemsolving.org>
to

12:49 PM (30 minutes ago)

☆ ⏪ ⏴

Welcome

You have successfully confirmed your account.

If you need to login to your account at any time you can do so by accessing the link below.

http://edportal.treasury.ca.gov/users/sign_in

Regards,
CDIAC Education Portal.

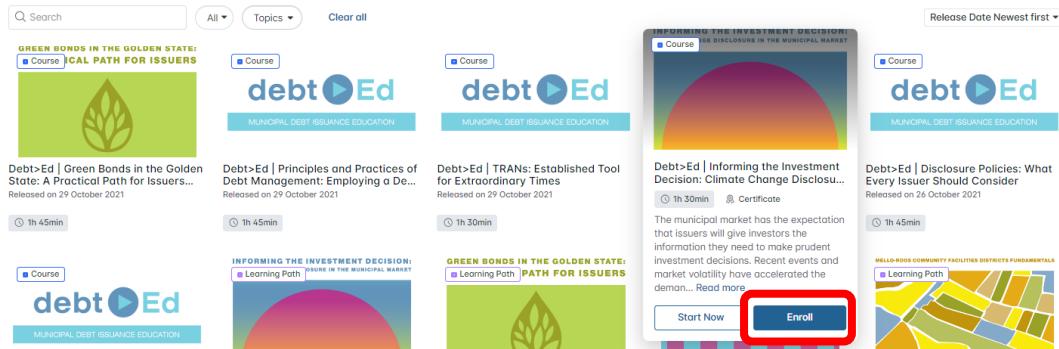
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You might also consider adding notifications@advancedproblemsolving.org to your safe-senders/contacts list so as to prevent our emails going to your spam folder.

REGISTERING FOR A COURSE

Users can enroll in courses via the [Course Catalog](#). Hover over your course of interest and click “Enroll” to register for the course without starting and to see its description and content. Alternatively, you can click “Start Now” to navigate directly to the course’s modules.

Explore your learning options



Explore your learning options

Q. Search All Topics Clear all Release Date Newest first ▾

GREEN BONDS IN THE GOLDEN STATE: A PRACTICAL PATH FOR ISSUERS... Course debt>Ed MUNICIPAL DEBT ISSUANCE EDUCATION

debt>Ed | Principles and Practices of Debt Management: Employing a De... Course debt>Ed MUNICIPAL DEBT ISSUANCE EDUCATION

debt>Ed | TRANs: Established Tool for Extraordinary Times Course debt>Ed MUNICIPAL DEBT ISSUANCE EDUCATION

INFORMING THE INVESTMENT DECISION: CLIMATE CHANGE DISCLOSURE IN THE MUNICIPAL MARKET Course debt>Ed MUNICIPAL DEBT ISSUANCE EDUCATION

Debt>Ed | Informing the Investment Decision: Climate Change Disclosu... Course debt>Ed MUNICIPAL DEBT ISSUANCE EDUCATION

Debt>Ed | Disclosure Policies: What Every Issuer Should Consider Course debt>Ed MUNICIPAL DEBT ISSUANCE EDUCATION

INFORMING THE INVESTMENT DECISION: CLIMATE CHANGE DISCLOSURE IN THE MUNICIPAL MARKET Course debt>Ed MUNICIPAL DEBT ISSUANCE EDUCATION

GREEN BONDS IN THE GOLDEN STATE: A PRACTICAL PATH FOR ISSUERS... Course debt>Ed MUNICIPAL DEBT ISSUANCE EDUCATION

Debt>Ed | Green Bonds in the Golden State: A Practical Path for Issuers... Released on 29 October 2021 1h 45min

Debt>Ed | Principles and Practices of Debt Management: Employing a De... Released on 29 October 2021 1h 45min

Debt>Ed | TRANs: Established Tool for Extraordinary Times Released on 29 October 2021 1h 30min

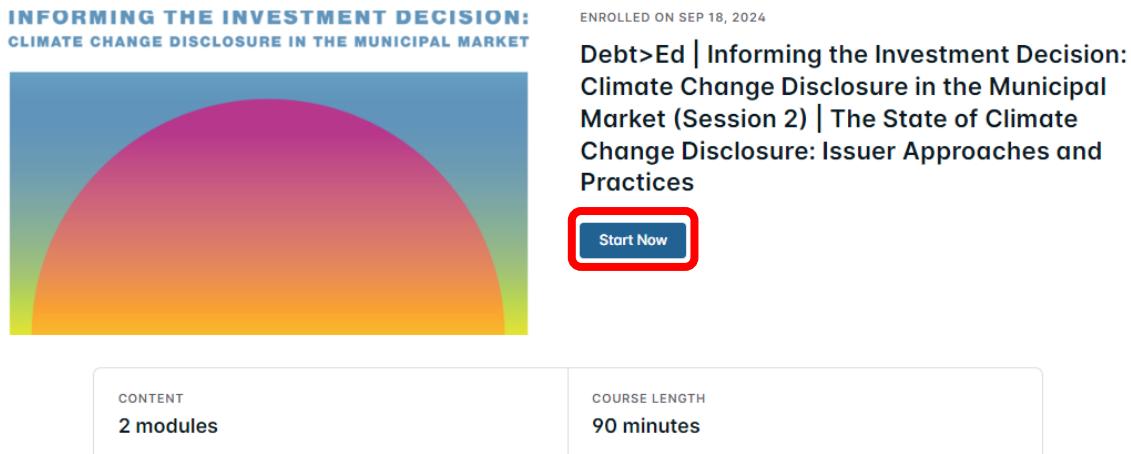
Debt>Ed | Informing the Investment Decision: Climate Change Disclosu... 1h 30min Certificate

The municipal market has the expectation that issuers will give investors the information they need to make prudent investment decisions. Recent events and market volatility have accelerated the demand... Read more

Start Now Enroll

MELLO-ROOS COMMUNITY FACILITIES DISTRICTS FUNDAMENTALS Course debt>Ed MUNICIPAL DEBT ISSUANCE EDUCATION

You will then be taken to the course’s homepage where you can find the course’s details and content. Click “Start Now” to navigate to the course’s modules.



INFORMING THE INVESTMENT DECISION: CLIMATE CHANGE DISCLOSURE IN THE MUNICIPAL MARKET

ENROLLED ON SEP 18, 2024

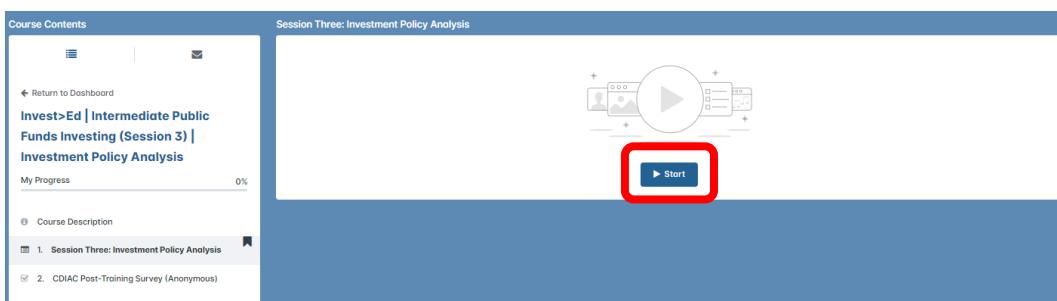
Debt>Ed | Informing the Investment Decision: Climate Change Disclosure in the Municipal Market (Session 2) | The State of Climate Change Disclosure: Issuer Approaches and Practices

Start Now

CONTENT
2 modules

COURSE LENGTH
90 minutes

To begin the course, click “Start”. You will be redirected to the first module’s content, which may include videos, presentations, and supplemental resources.



Course Contents

Return to Dashboard

Invest>Ed | Intermediate Public Funds Investing (Session 3) | Investment Policy Analysis

My Progress 0%

Course Description

1. Session Three: Investment Policy Analysis

2. CDIAC Post-Training Survey (Anonymous)

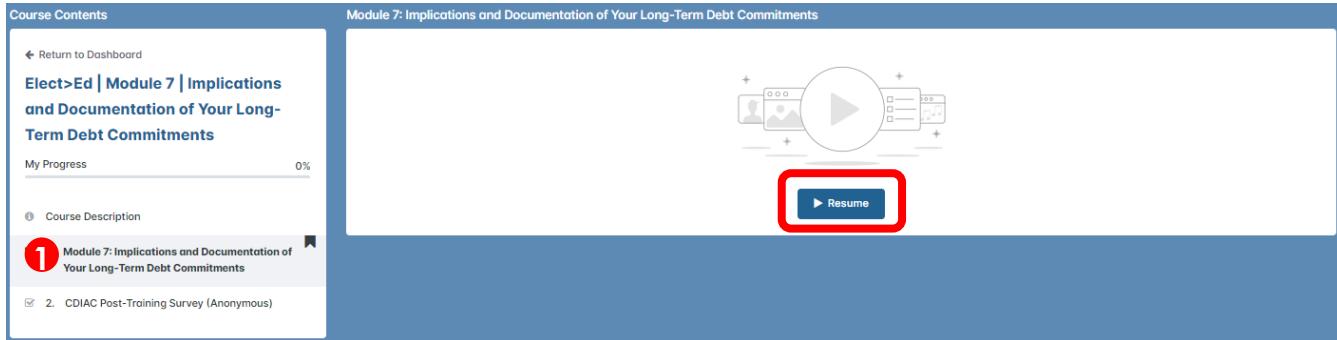
Session Three: Investment Policy Analysis

Start

COMPLETING A COURSE

To complete a course, you must finish all modules in that course. This may include videos, surveys, and/or quizzes.

For example, the *Elect>Ed | Module 7 | Implications and Documentation of Your Long-Term Debt Commitments* course requires the user to complete a series of videos and quizzes before earning a certificate.



Course Contents

Module 7: Implications and Documentation of Your Long-Term Debt Commitments

Return to Dashboard

Elect>Ed | Module 7 | Implications and Documentation of Your Long-Term Debt Commitments

My Progress 0%

Course Description

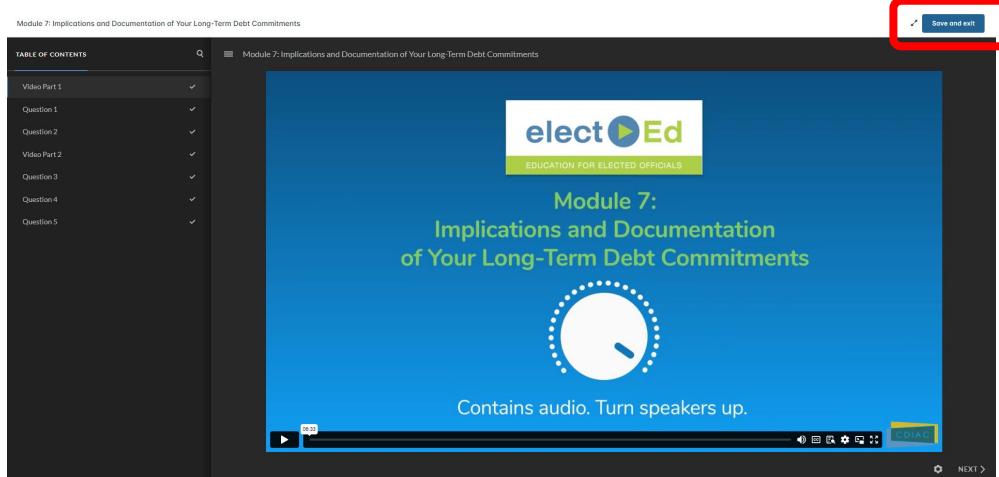
Module 7: Implications and Documentation of Your Long-Term Debt Commitments

CDIAC Post-Training Survey (Anonymous)

Resume

When you start or resume the course, you will be taken to the course's content. For the Elect>Ed series, this is generally a collection of short videos followed by a series of questions. To successfully complete the course, you must score an 80% or higher.

When exiting a course, do not forget to click "Save and exit" at the top-right of your screen to save your progress.



Module 7: Implications and Documentation of Your Long-Term Debt Commitments

TABLE OF CONTENTS

Video Part 1

Question 1

Question 2

Video Part 2

Question 3

Question 4

Question 5

Module 7: Implications and Documentation of Your Long-Term Debt Commitments

elect>Ed

EDUCATION FOR ELECTED OFFICIALS

Module 7: Implications and Documentation of Your Long-Term Debt Commitments

Contains audio. Turn speakers up.

Save and exit

COMPLETING A COURSE

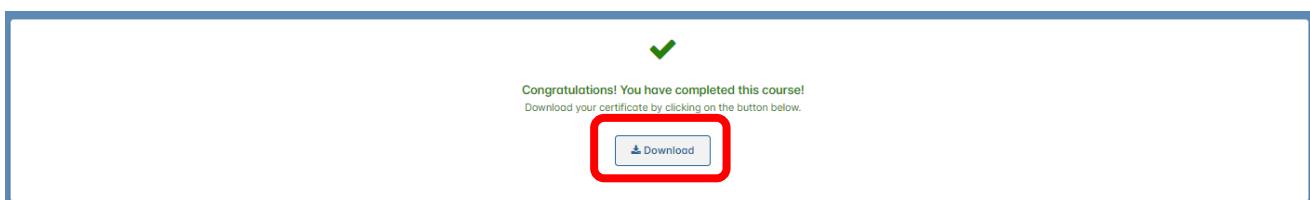
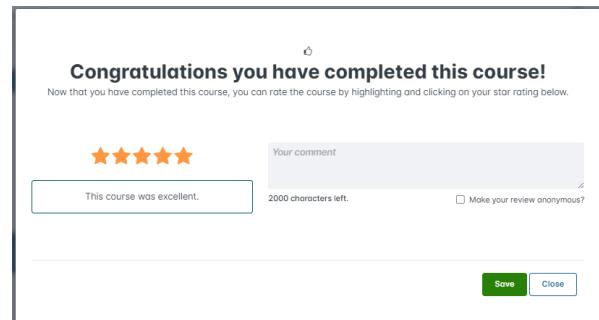
Some courses may be organized differently, but the process for completing a course is similar. For example, *Informing the Investment Decision: Climate Change Disclosure in the Municipal Market* will display all materials on one page above the video.

When exiting a course, do not forget to click “Save and exit” at the top-right of your screen to save your progress. It is recommended that users do not exit the video prior to completing it to ensure all progress is saved.



After completing all modules in a course and clicking “Save and Exit”, you will receive a dialog box notifying you that you have completed the course. Consider leaving an optional review to aid CDIAC in tailoring future programming to best meet the needs of our constituents.

Now, you can download your certificate:



Homepage

Navigation Guide

A CDIAC EDUCATION PORTAL Home My Learning Catalog

B Search

C Inbox

D Account Details & Settings

E Clickable Banner: Click on the first banner image to navigate to the *Course Catalog*

F Courses Learning paths

G Learning in progress

H Learning not started

I My live sessions

CDIAC EDUCATION PORTAL

debt>Ed **invest>Ed** **elect>Ed**

MUNICIPAL DEBT ISSUANCE EDUCATION PUBLIC FUND INVESTMENT EDUCATION EDUCATION FOR ELECTED OFFICIALS

Welcome to CDIAC's Education Portal, which houses training for California public finance professionals. Select View Courses to explore all available training material. [VIEW COURSES ▶](#)

Hi Trista, welcome back!

Learning in progress

- Debt>Ed | Informing the Investment Decision: Climate...**
Last opened September 19, 2024
1/2 modules completed
Certificate
- elect>Ed | Module 5 | It Takes a Team**
Last opened August 12, 2024
0/2 modules completed
Certificate
- elect>Ed | Pension Fundamentals for Elected Officials (Part 1) | ...**
Last opened May 2, 2024
0/2 modules completed
Certificate

Learning not started

- Vista Forge Los Angeles / Long Beach Online Seminar**
Expires November 1, 2024
This Vista Forge Los Angeles / Long Beach (VF LA/LB) online seminar is part of a regional training program bas...
0.0 ⭐⭐⭐⭐⭐ (0)
2h
- Test 5 Elected Officials' Role in Pension**
Enrolled on February 14, 2024
Pension Fundamentals for Elected Officials (Part 2) | Elected Officials' Role in Pension Originally Aired: Ma...
0.0 ⭐⭐⭐⭐⭐ (0)
45min Certificate
- Invest>Ed | Fundamentals of Public Funds Investing (Session 3...)**
Enrolled on September 25, 2023
This session will introduce many of the issues considered relevant to constructing a public fund portfolio and...
1h 15min Certificate

My live sessions

September 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

Select a date to see your live sessions

A Page Navigation

Home: your dashboard, including learning in progress, not started, and upcoming CDIAC events

My Learning: your enrolled, in progress, and completed courses

Catalog: list of all courses currently published by CDIAC.

B Search:

Search for courses you are enrolled in.

D Account Details & Settings

C **Inbox:** Send and receive messages.

F Filter:

Filter your learning by courses or learning path

E **Clickable Banner:** Click on the first banner image to navigate to the *Course Catalog*

H Learning Not Started

G **Learning in Progress**

I **CDIAC Event Calendar**

MY LEARNING

Navigation Guide

A Home | My Learning | Catalog

B Download training history

C Courses | Learning paths

D Search

E Status | Topics | Clear all

F Course Status Bar

A Page Navigation

Home: your dashboard, including learning in progress, not started, and upcoming CDIAC events

My Learning: your enrolled, in progress, and completed courses

Catalog: list of all courses currently published by CDIAC.

B Download All-Time Training History as a PDF or CSV

D Search Your Not Started, In Progress, and Completed Courses

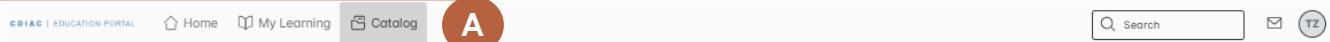
F Course Status Bar

C Filter by Course or Learning Path

E Filter by Status or Topic

CATALOG

Navigation Guide



Catalog



Through CDIAC's course catalog, you can review and enroll in all available training material. These features may help you identify courses:

LEARNING PATHS Above this image is the *Learning Paths* feature, which collects individual courses that are intended to be taken as part of a series and lists them in the intended order of progression. This is a great place to start when you don't know where to start.

FILTER CATALOG Below this image is the *Filter Catalog* area with the *Topics* drop-down menu that will help you filter all available courses by the topic.

B Search bar and course filters (All, Topics, Clear all).

C Hovering over a course card for details.

D Filter Catalog area with Topics dropdown.

E Hovering over a course card for details.

F Page navigation buttons (Page: 1 of 2).

Course Title	Release Date	Duration	Topics
Debt-Ed Intermediate Bond Math (Part Two): Economics and...	Released on 30 November 2023	0.50 stars (2)	1h 40min
Debt-Ed Municipal Green Bond Disclosure: Investor Guidance and...	Released on 6 October 2023	0.00 stars (0)	1h 35min
Debt-Ed An Integrated Approach to Strategic Pension Liability...	Released on 29 September 2023	5.00 stars (1)	1h 30min
Debt-Ed Green Bonds in the Golden State: A Practical Path for Issuers...	Released on 24 July 2023	0.00 stars (0)	1h 30min
Data Portal: Annual Debt Transparency Report Tutorial	Released on 27 July 2023	5.00 stars (3)	1h 30min
Pension Fundamentals for Elected Officials	Released on 21 April 2022	0.00 stars (0)	2 courses
Invest-Ed Advanced Public Funds Investing (Session 3) Interpreting...	Released on 15 March 2022	5.00 stars (4)	1h 15min

A Page Navigation

Home: your dashboard, including learning in progress, not started, and upcoming CDIAC events

My Learning: your enrolled, in progress, and completed courses

Catalog: list of all courses currently published by CDIAC.

B **Search:** Search for any of CDIAC's published courses.

D **Filter by Topic**

F **Page Navigation**

C **Filter by Course or Learning Path**

E **Hover Over a Course for Its Details or to Start**

Note: Courses that you are already enrolled in, including those not started, in progress, and complete, will not appear in the course catalog. Instead, these are listed on the *My Learning* page.