

# 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](mailto: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 [tagalli@ucdavis.edu](mailto:tagalli@ucdavis.edu)

You should receive an email confirming your account in the next few minutes. If you don't get it, please check your spam folder.

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

**CDIAC Education Portal** <notifications@advancedproblemsolving.org> to tagalli ▾ 4:50 PM (3 minutes ago) ☆ ↶ ⋮

Welcome [tagalli@ucdavis.edu](mailto:tagalli@ucdavis.edu).

You can confirm your account through the link below:

[https://edportal.treasurer.ca.gov/users/confirmation?confirmation\\_token=D08EFG6vTanoCUKki\\_A09](https://edportal.treasurer.ca.gov/users/confirmation?confirmation_token=D08EFG6vTanoCUKki_A09)

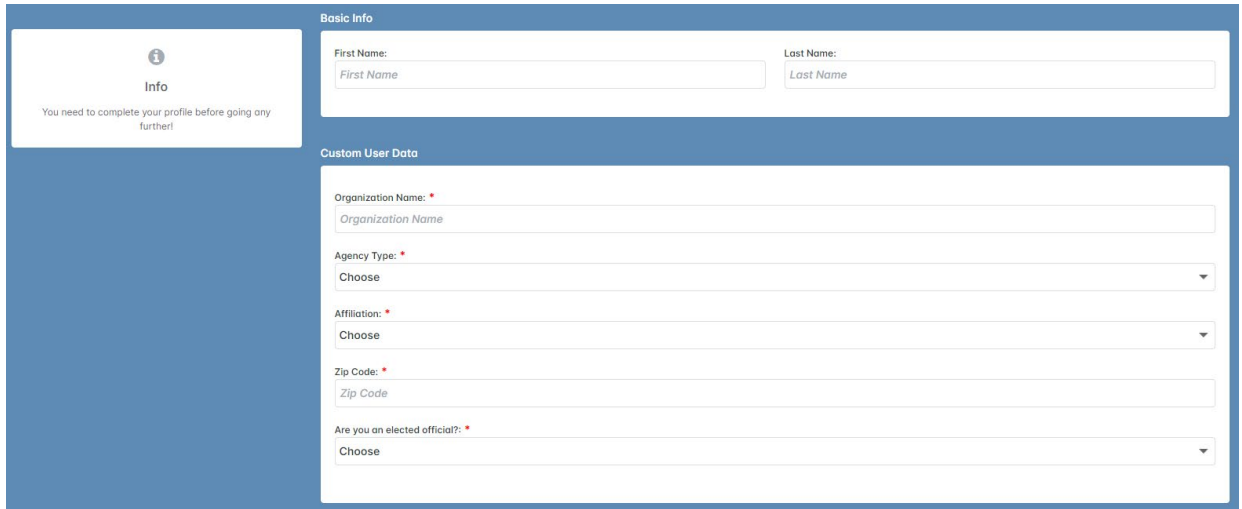
Regards,  
CDIAC Education Portal  
--

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

# CREATING YOUR ACCOUNT

Continued

## 5 Enter your profile information



The screenshot shows a web form for creating a profile. On the left, there is an 'Info' box with an information icon and the text: 'You need to complete your profile before going any further!'. The main form is divided into two sections: 'Basic Info' and 'Custom User Data'. The 'Basic Info' section contains two text input fields: 'First Name' (placeholder: First Name) and 'Last Name' (placeholder: Last Name). The 'Custom User Data' section contains several fields: 'Organization Name' (text input, placeholder: Organization Name), 'Agency Type' (dropdown menu, placeholder: Choose), 'Affiliation' (dropdown menu, placeholder: Choose), 'Zip Code' (text input, placeholder: Zip Code), and 'Are you an elected official?' (dropdown menu, placeholder: Choose).

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

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



**CDIAC Education Portal** <notifications@advancedproblemsolving.org>  
to tagalli ▾

12:49 PM (30 minutes ago) ☆ ↶ ⋮

Welcome [tagalli@ucdavis.edu](mailto:tagalli@ucdavis.edu),

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.treasurer.ca.gov/users/sign\\_in](http://edportal.treasurer.ca.gov/users/sign_in)

Regards,  
CDIAC Education Portal.

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You might also consider adding [notifications@advancedproblemsolving.org](mailto: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*. Once enrolled, the course will be highlighted on your *Dashboard*. Register by clicking the “Start” button at the bottom right of your course of interest:

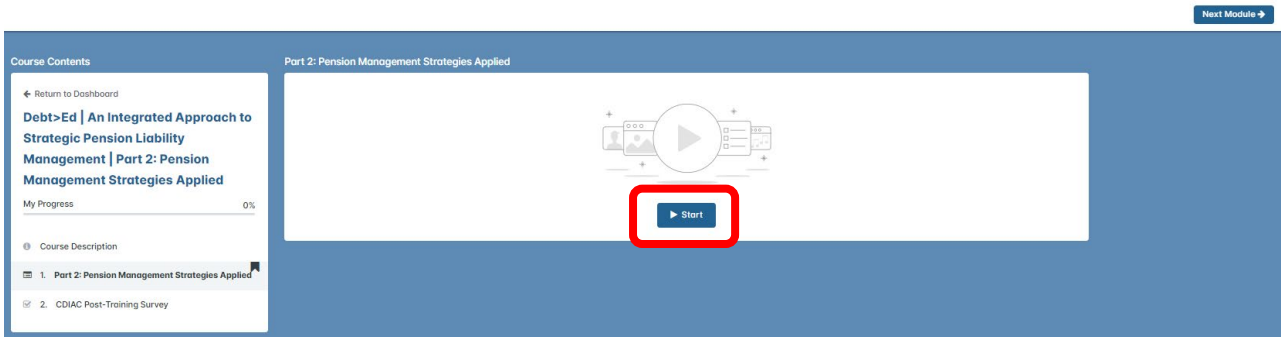


**Debt>Ed | An Integrated Approach to Strategic Pension Liability Management | Part 2: Pension Management Strategies Applied**  
Length 100 Mins · Released 29 Sep 2023

The past three years have been characterized by sudden and drastic changes in the financial markets, which have directly affected the funding status of pension liabilities for public agencies. The Ca... Read More

2 Modules   Certificate   **Start**

You will then be taken to the course’s homepage where you can find the course’s details and content. Click “Start” again to begin the module.



Next Module →

Course Contents

Return to Dashboard

**Debt>Ed | An Integrated Approach to Strategic Pension Liability Management | Part 2: Pension Management Strategies Applied**

My Progress 0%

Course Description

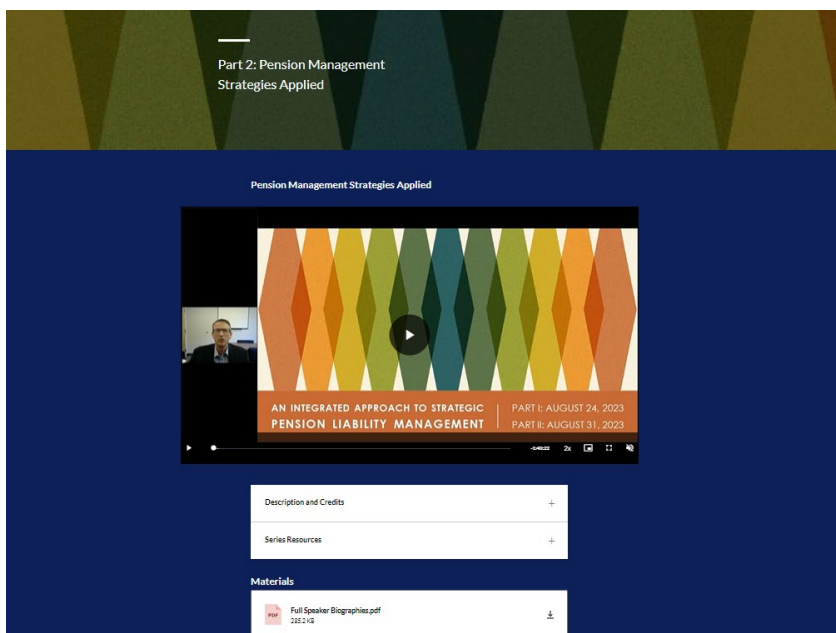
1. **Part 2: Pension Management Strategies Applied**

2. CDIAAC Post-Training Survey

Part 2: Pension Management Strategies Applied

**Start**

You will then be taken to the course content, which may include videos, presentations, and supplemental resources.



Part 2: Pension Management Strategies Applied

Pension Management Strategies Applied

**Start**

Description and Credits +

Series Resources +

Materials

Full Speaker Biographies.pdf 26214

# COMPLETING A COURSE (Example 1)

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 two modules before earning a certificate:

1. Videos and quizzes embedded into a single module titled *Module 7: Implications and Documentation of Your Long-Term Debt Commitments*
2. CDIAC's anonymous post-training survey

The image shows two side-by-side screenshots from a learning management system. The left screenshot is the 'Details' page for 'Module 7: Implications and Documentation of Your Long-Term Debt Commitments'. It features the 'elect>Ed' logo and a list of topics: 'The commitments of the agency and constituency when issuing long-term debt.', 'Policy implications of the most frequently issued types of long-term debt.', 'The fundamental documentation used to formalize commitments made through debt issuance.', and 'The elected official's role and responsibility in documenting the issuance transaction.' A 'Resume' button is highlighted with a red box. The right screenshot is the 'Course Contents' page, showing a progress bar at 0% and a list of two items: 'Module 7: Implications and Documentation of Your Long-Term Debt Commitments' (marked with a red '1') and 'CDIAC Post-Training Survey (Anonymous)' (marked with a red '2').

When you 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.

The image shows a video player interface for 'Module 7: Implications and Documentation of Your Long-Term Debt Commitments'. The video content displays the 'elect>Ed' logo and the title 'Module 7: Implications and Documentation of Your Long-Term Debt Commitments'. Below the title is a circular graphic with a play button icon and the text 'Contains audio. Turn speakers up.' A 'Save and exit' button is highlighted with a red box in the top right corner. A 'TABLE OF CONTENTS' sidebar is visible on the left, listing 'Video Part 1', 'Question 1', 'Question 2', 'Video Part 2', 'Question 3', 'Question 4', and 'Question 5'. A video progress bar is at the bottom.

# COMPLETING A COURSE (Example 1)

Continued

Now that you have completed the course’s educational content, you can take CDIAC’s anonymous post-training survey. These questions are not required, so you may simply hit “Next Question” for those you do not wish to answer.

CDIAC Post-Training Survey (Anonymous)

All answers provided will be anonymous.

Question 1 out of 8:  
Please answer the following question:

How would you rate the webinar?

Rating:  
Choose rating

Next Question

After completing all the modules in a course, 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.

Congratulations you have completed this course!

Now that you have completed this course, you can rate the course by highlighting and clicking on your star rating below.

★★★★★

Your comment

2000 characters left.  Make your review anonymous?

Save Close

Now, you can download your certificate:

Congratulations! You have completed this course!  
Download your certificate by clicking on the button below.

Download

Course Contents

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

My Progress

- Course Description
- 1. Module 7: Implications and Documentation of Your Long-Term Debt Commitments
- 2. CDIAC Post-Training Survey (Anonymous)

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

Relaunch

# COMPLETING A COURSE (Example 2)

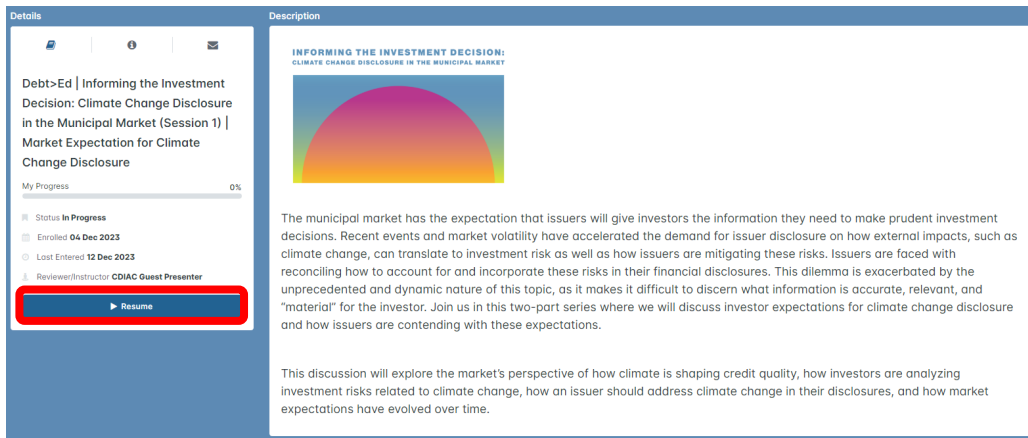
To complete a course, you must finish all modules in that course. This may include videos, surveys, and/or quizzes. Click on “Start” or “Resume” to access the course.



The image shows a course card with a blue header and a white background. On the left is a colorful semi-circle graphic. The title is "Debt>Ed | Informing the Investment Decision: Climate Change Disclosure in the Municipal Market (Session 1) | Market Expectation for Climate Change Disclosure". Below the title, it says "In Progress" and "Last entered on 12 Dec 2023". A short description follows: "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 acceler ... Read More". At the bottom, there is a "2 Modules" button, a progress indicator at "0%", and a "Resume" button highlighted with a red border.

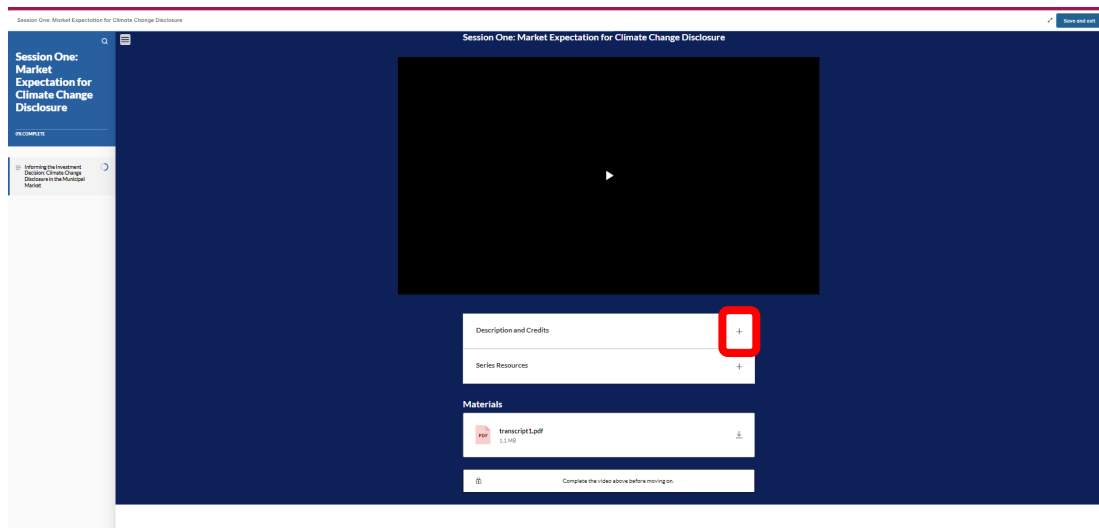
For this course, there are two modules that must be completed before earning a certificate:

1. Session One: Market Expectation for Climate Change Disclosure
2. CDIAC’s anonymous post training survey



The image shows a course details page. On the left is a sidebar with course information: "Debt>Ed | Informing the Investment Decision: Climate Change Disclosure in the Municipal Market (Session 1) | Market Expectation for Climate Change Disclosure", "My Progress 0%", "Status: In Progress", "Enrolled 04 Dec 2023", "Last Entered 12 Dec 2023", and "Reviewer/Instructor: CDIAC Guest Presenter". A "Resume" button is highlighted with a red border. The main content area has a description: "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 for issuer disclosure on how external impacts, such as climate change, can translate to investment risk as well as how issuers are mitigating these risks. Issuers are faced with reconciling how to account for and incorporate these risks in their financial disclosures. This dilemma is exacerbated by the unprecedented and dynamic nature of this topic, as it makes it difficult to discern what information is accurate, relevant, and 'material' for the investor. Join us in this two-part series where we will discuss investor expectations for climate change disclosure and how issuers are contending with these expectations." Below this is a paragraph: "This discussion will explore the market's perspective of how climate is shaping credit quality, how investors are analyzing investment risks related to climate change, how an issuer should address climate change in their disclosures, and how market expectations have evolved over time."

You will then be taken to the course’s content. Use the drop-down menus to see additional information and resources.



The image shows a course content page. The header is "Session One: Market Expectation for Climate Change Disclosure". On the left is a sidebar with "Session One: Market Expectation for Climate Change Disclosure" and "INCOMPLETE". The main content area has a video player with a play button. Below the video player are three sections: "Description and Credits" with a "+" button highlighted in red, "Series Resources" with a "+" button, and "Materials" with a PDF file named "transcript.pdf". At the bottom, there is a note: "Complete the video above before moving on."

# COMPLETING A COURSE (Example 2)

After watching the entirety of your video, click the “Conclude This Section” video to complete it.

## CDIAC study of climate change disclosure among California enterprise issuers.

- [Task Force on Climate-related Financial Disclosures: Status Report](#)  
TCFD progress report published in June 2019 with information about the adoption of TCFD recommendations published in 2017.



CONCLUDE THIS SECTION

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.

Session One: Market Expectation for Climate Change Disclosure

Session One: Market Expectation for Climate Change Disclosure

Session One: Market Expectation for Climate Change Disclosure

INCOMPLETE

Informing the Investment Decision: Climate Change Disclosure in the Municipal Market

Description and Credits +

Series Resources +

Materials

transcript1.pdf 1.1 MB

Compare the video above before moving on.

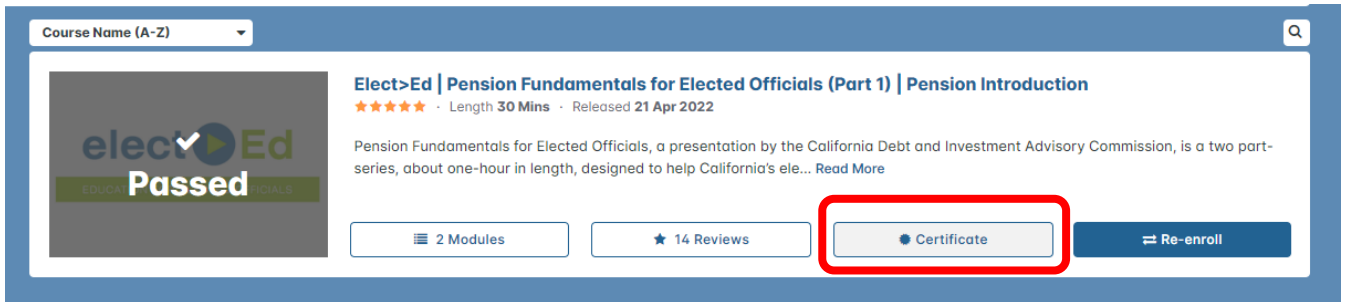
Save and exit



# COMPLETING A COURSE

Continued

You may also download the PDF file of your certificate under the completed course in the *Course Catalog*:



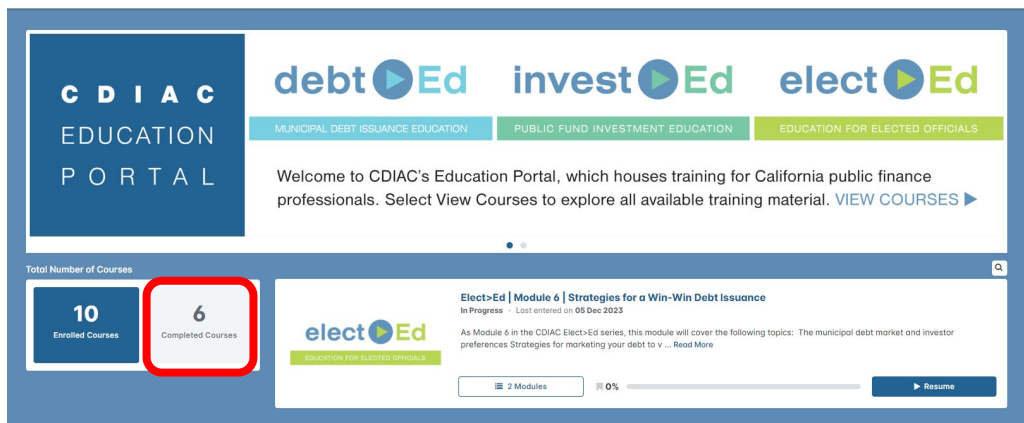
Course Name (A-Z) Q

**Elect>Ed | Pension Fundamentals for Elected Officials (Part 1) | Pension Introduction**  
★★★★★ · Length 30 Mins · Released 21 Apr 2022

Pension Fundamentals for Elected Officials, a presentation by the California Debt and Investment Advisory Commission, is a two part-series, about one-hour in length, designed to help California's ele... [Read More](#)

2 Modules   14 Reviews   **Certificate**   Re-enroll

Or in your “Completed Courses” on your *Dashboard*:



**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](#)

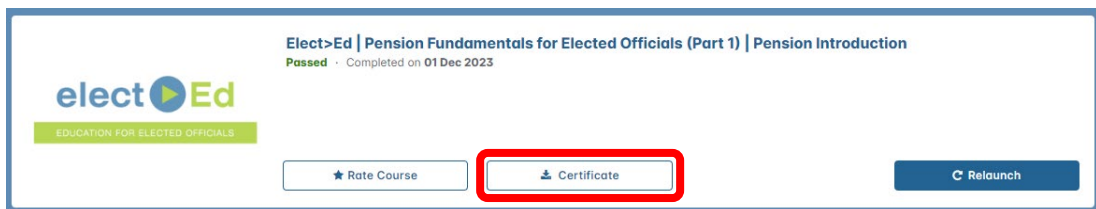
Total Number of Courses

10 Enrolled Courses   **6 Completed Courses**

**Elect>Ed | Module 6 | Strategies for a Win-Win Debt Issuance**  
In Progress · Last entered on 05 Dec 2023

As Module 6 in the CDIAC Elect>Ed series, this module will cover the following topics: The municipal debt market and investor preferences Strategies for marketing your debt to v... [Read More](#)

2 Modules   0%   Resume



**Elect>Ed | Pension Fundamentals for Elected Officials (Part 1) | Pension Introduction**  
Passed · Completed on 01 Dec 2023

elect Ed  
EDUCATION FOR ELECTED OFFICIALS

★ Rate Course   **Certificate**   Relaunch

# HOMEPAGE

## Navigation Guide

The screenshot shows the CDIA Education Portal homepage. At the top, there is a navigation bar (A) with 'CDIAC | EDUCATION PORTAL', 'Dashboard', and 'Catalog'. A search bar (B) and an inbox icon (C) are on the right, along with a user profile icon (D) labeled 'TZ'. Below the navigation bar is a 'Training History' button (E). The main content area features a large banner (H) with three course categories: 'debt Ed' (Municipal Debt Issuance Education), 'invest Ed' (Public Fund Investment Education), and 'elect Ed' (Education for Elected Officials). A welcome message and a 'VIEW COURSES' link are present. Below the banner is a 'Total Number of Courses' section (F) showing 2 enrolled and 1 completed course. Two course cards are displayed: 'Invest>Ed | Socially Responsible Investing: Integration in the Local Agency Portfolio' (G) and 'Elect>Ed | Module 3 | Strategy Drives Structure'. The bottom of the page has a contact section (I) with the email 'CDIAEducation@treasurer.ca.gov' and phone number '(916) 653-3269'.

### Section Navigation

**A** *Dashboard:* your homepage  
*Catalog:* list of all courses currently published by CDIA.

**B** **Search**  
Search your dashboard for courses you are enrolled in.

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

**D** **Account Details & Settings**

**E** **Training History**  
Download your all-time training history as a PDF.

### Cumulative Course Data

**F** Click on either box for a list of all your enrolled and completed courses, respectively.

**G** **Display Area for the (F) Toggle**

### Clickable Banner

**H** Click on the first banner image to navigate to the *Course Catalog* or the second image to open Module 7 of CDIA's Elect>Ed series.

### Contact

**I** CDIA's contact information for users to submit questions, comments, or concerns.

# CATALOG

## Navigation Guide

The screenshot shows the CDIA Course Catalog interface. At the top, there's a navigation bar with 'CDIAC | EDUCATION PORTAL', 'Dashboard', and 'Catalog' tabs. A search bar and a user profile icon are on the right. Below the navigation bar, there's a header section with the CDIA logo and a welcome message. The main content area is divided into a left sidebar and a main list of courses. The sidebar contains a 'Filter Catalog' section with options for 'Category', 'Show', 'Released After', and 'Released Before', and an 'About' section. The main list shows several courses, each with a title, description, length, release date, and buttons for 'Modules', 'Reviews', 'Certificate', and 'Start'. A 'Page 1' indicator is at the bottom.

**A** Filter Options

**B** Sort Options

**C** Course List

**D** Module Information

**E** Reviews

**F** Course Summary & Certificate Information

**G** Course Enrollment

**H** Page Navigation

**A** **Filter Options**  
Filter by category, availability, and release dates.

**B** **Sort Options**  
Sort courses alphabetically or chronologically.

**C** **Course List**  
All available CDIAC courses.

**D** **Module Information**  
All details for a course, including the description, content, and reviews.

**E** **Reviews**  
Course reviews from other learners

**F** **Course Summary & Certificate Information**

**G** **Course Enrollment**  
Enroll and begin the course

**H** **Page Navigation**  
Navigate through CDIAC's 9+ pages of courses

# COURSES & MODULES

## Navigation Guide

The screenshot shows a course page for 'Elect>Ed | Pension Fundamentals for Elected Officials (Part 1) | Pension Introduction'. The interface is divided into several sections:

- Navigation Panel (B):** Located at the top, it includes tabs for 'Details', 'Content', and 'Reviews'. A 'Resume' button is visible in the top right corner.
- Course Details (A):** A sidebar on the left containing course information, progress (0%), enrollment date (22 Nov 2023), and a 'Resume' button.
- Description (D):** The main content area featuring the 'electEd' logo and a detailed text description of the course.
- Certs & Credits (E):** A section at the bottom indicating 'Certificate of Completion'.

**A** **Course Details**  
Including your progress, enrollment date, and date of last entry.

**D** **Course Description**  
Detailed description of the content and objectives of the course.

**B** **Navigation Panel**  
Navigate to course details, course modules, and course reviews (if applicable).

**E** **Certificate Information**

**C** **Start/Resume**  
Start or resume the course.