Version 2021.1

CSD Local Agencies Portal User Guide

CALIFORNIA DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT

California Department of Community Services and Development
Local Agencies Portal User Guide

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Overview

The California Department of Community Services & Development (CSD) Local Agencies Portal (Portal) is designed to share information with Community Services Block Grant (CSBG) Agencies and Local Service Providers (LSPs), including contract documents, forms, training materials, and other resources.

This User Guide offers step-by-step instructions on how to manage your CSD Portal password (recover and reset), along with a general breakdown of the information provided on the site, and an overview of each tab in the Portal. This guide also includes troubleshooting tips in case if you run into an issue, and who to contact for further assistance.

Section 1: Before you begin…

For the best experience using the Portal, please note the following:

- Use the latest version of a modern web browser (e.g. Google Chrome, Microsoft Edge, or Mozilla Firefox)

- The User ID for the Portal can also be used for the Combined Outcome Reporting Engine (CORE) system; this means:

    o Users should use [userId]@csd.ca.gov to login to the Portal and to CORE (e.g.,77777TUser@csd.ca.gov).
    o There is only one password for both systems; when you change the password in one, the password will change for the other system also (even though the screens you go through when changing a password in CORE will be slightly different).
    o The legacy User ID format of [csdnet\userId] will not work in the Portal but will continue to work in CORE until further notice.

- The User ID for the Portal is different from the User ID and usernames for other CSD applications such as the Expenditure Activity Reporting System (EARS) and Historic Preservation Online (HPO).

- For trouble logging into the Portal, please review **Troubleshooting Tips**, and try the step(s) applicable to your scenario. If you need further assistance, please see **User Assistance Contact**.

Section 2: Sign in Step-by-step

The following step-by-step guide describes the Sign In steps for Portal users.

Step 1: Open a modern web browser (e.g. Google Chrome, Microsoft Edge, or Mozilla Firefox). Internet Explorer is not recommended.
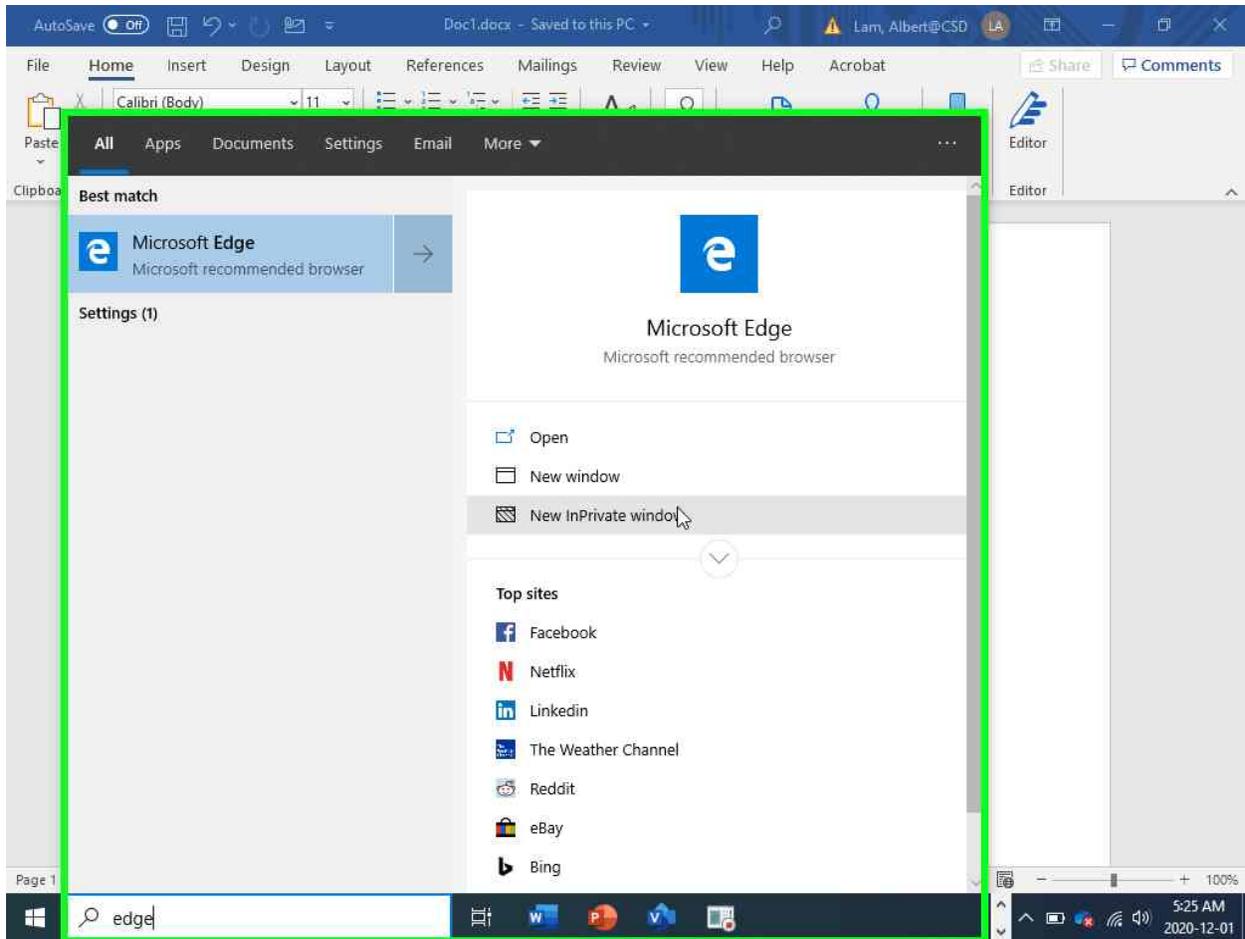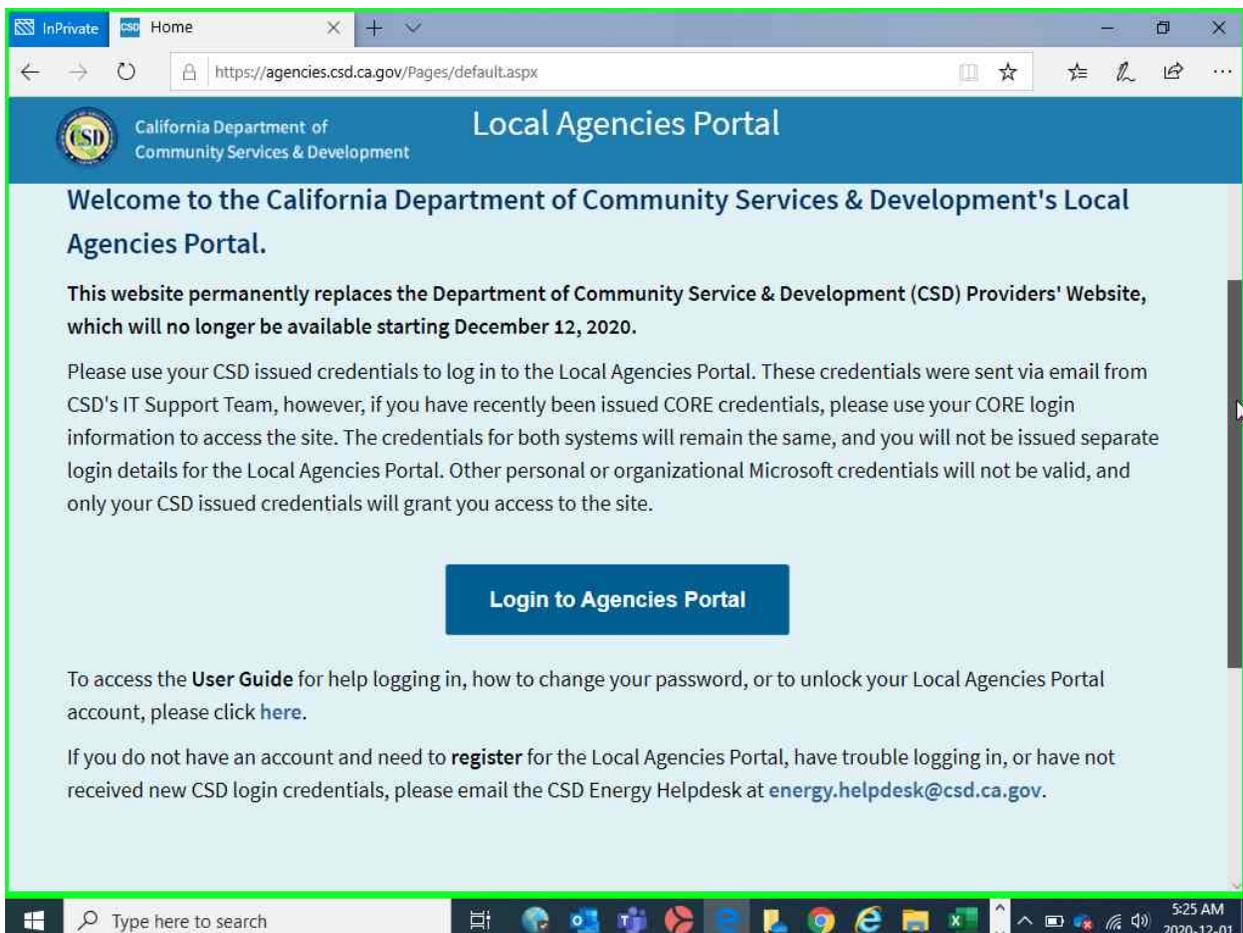

Screenshot of a Windows application search window

Step 2: Click inside the web address box of the web browser, type **agencies.csd.ca.gov** and press the "Enter" key.
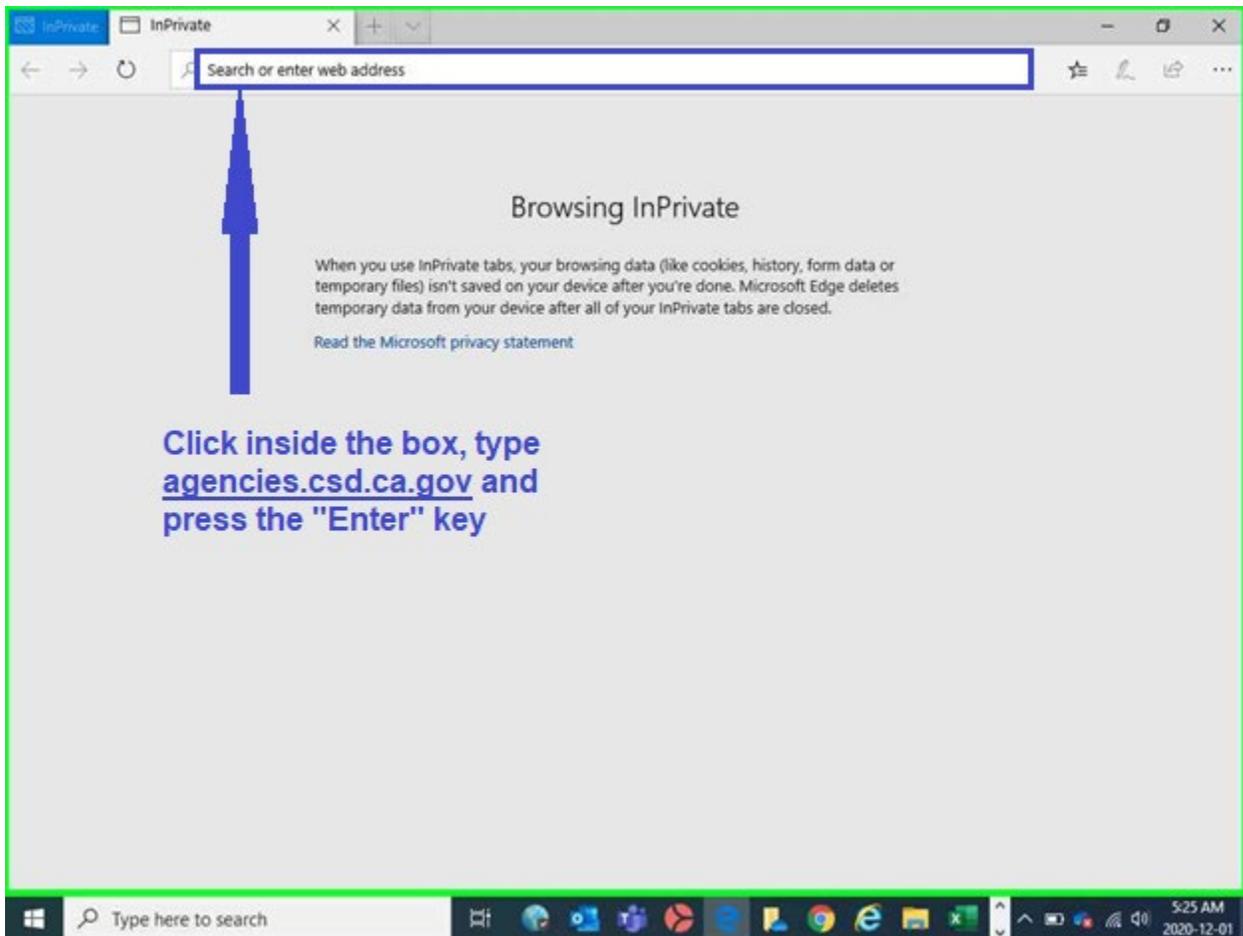

Screenshot of a blank browser window with the web address textbox highlighted

Step 3: When the Local Agencies Portal is displayed, click the "Login to Agencies Portal" button.
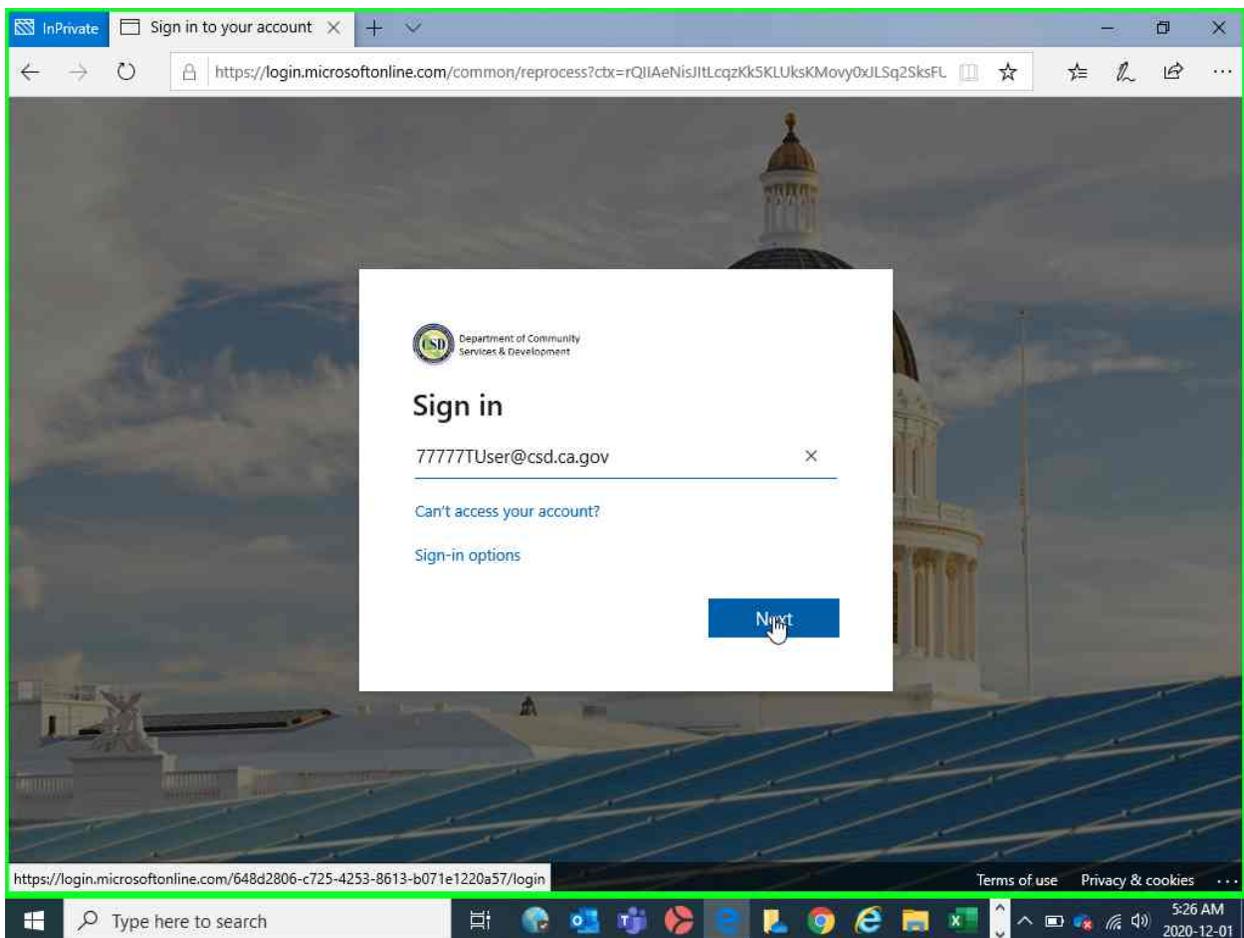

Screenshot of the landing page at agencies.csd.ca.gov

Step 4: When the Sign in page is displayed, click on the textbox below "Sign in" and enter your CSD supplied User ID – be sure to include the "@csd.ca.gov" (e.g.,77777TUser@csd.ca.gov) – then click "Next".
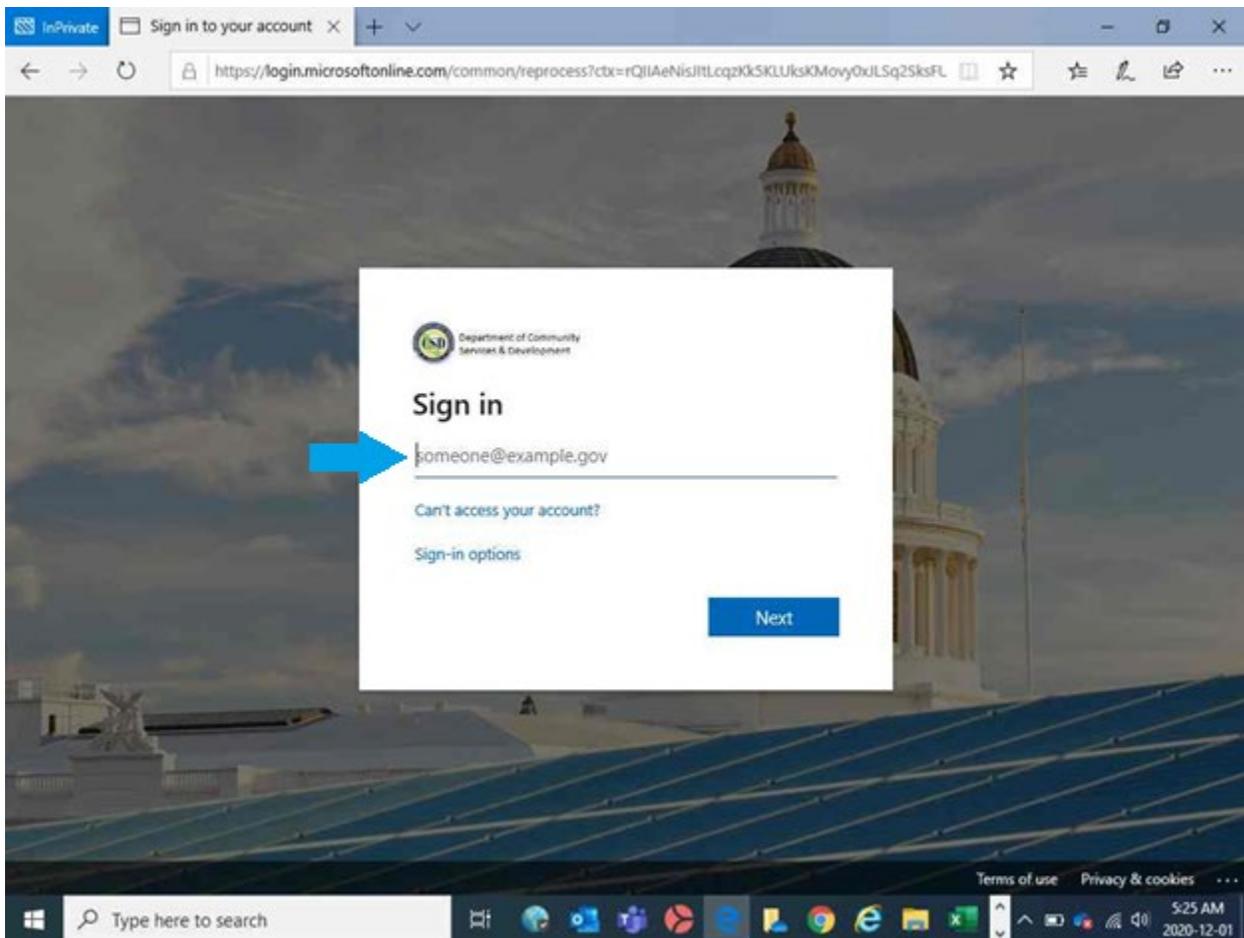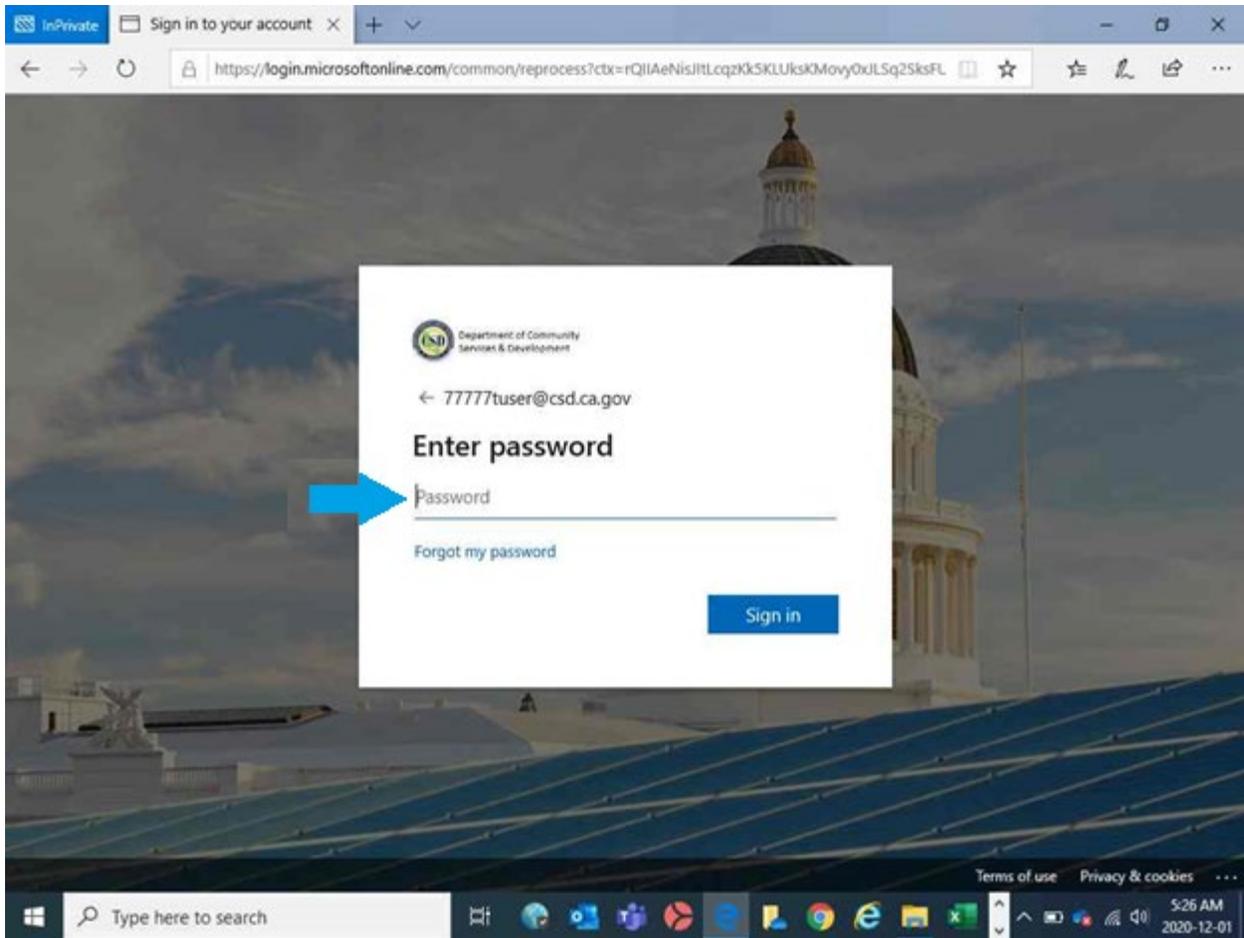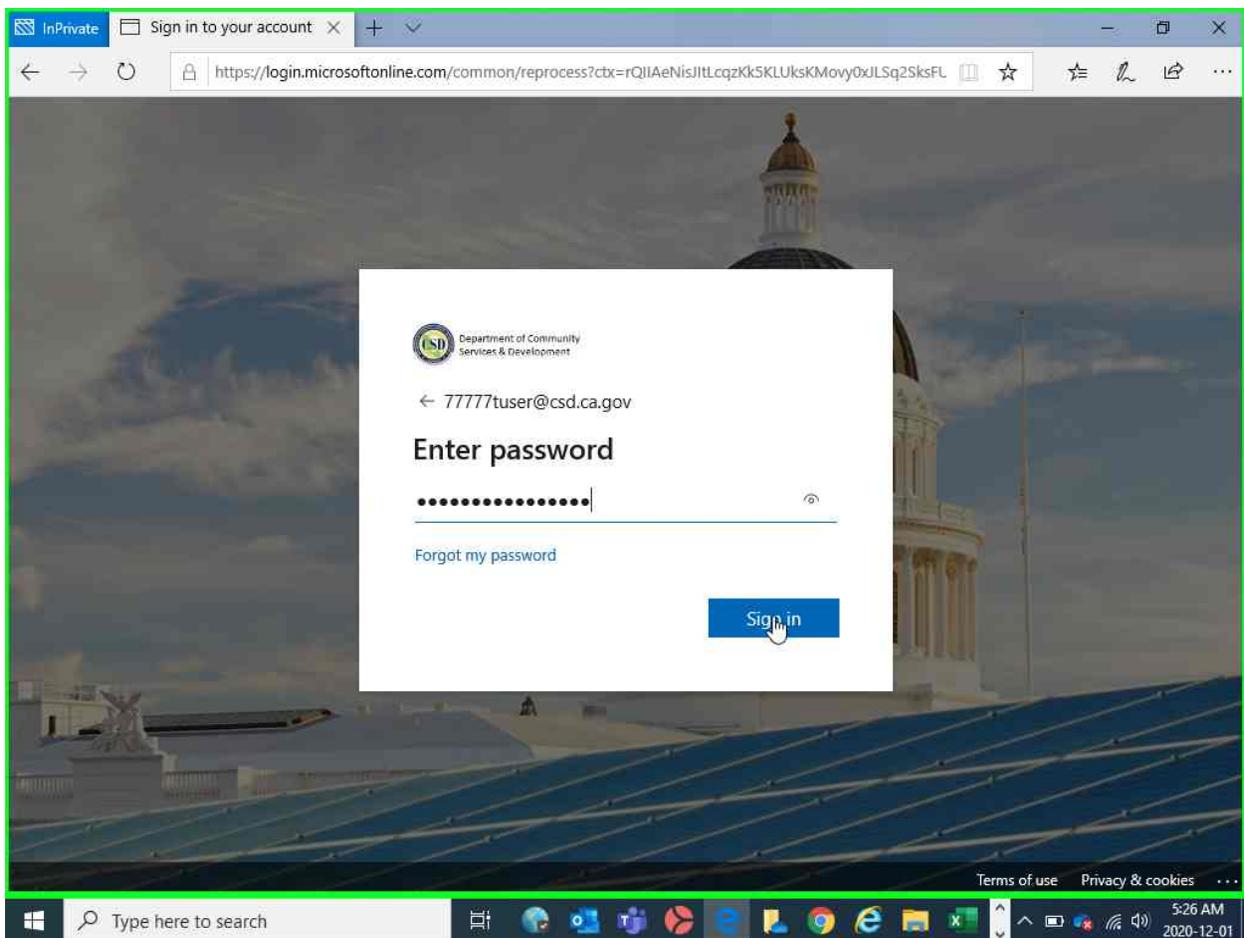

Screenshot of the Sign In page

Screenshot of the Sign In page with a sample username entered

Step 5: Next, click on the textbox below "Enter password" and enter your password, then click "Sign in."
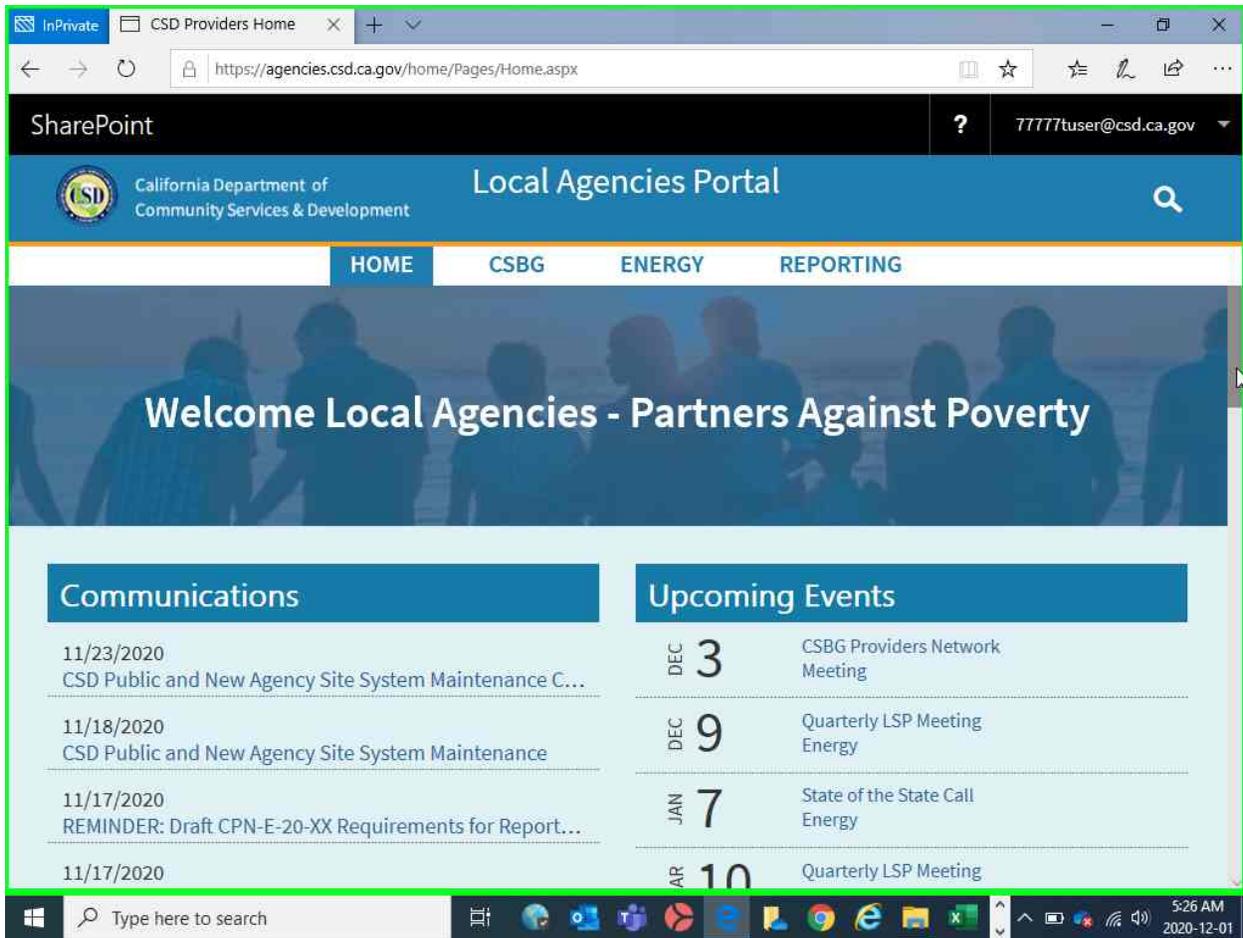

Screenshot of the Enter password page

Screenshot of the Enter password page with a password entered

Step 6: When the Local Agencies Portal homepage is displayed, you have successfully completed the sign in process.

Screenshot of a sample portal page after a successful sign in

Please note that the content displayed will vary depending upon the programs your organization is contracted to deliver.

Section 3: Portal Content Overview

The Agencies Portal is separated into several content hubs. The content hubs are organized to provide easy access to information that may be helpful or useful to Local Agency staff using the site. Please note that only dual providers will have access to both Energy and CSBG hubs. The hubs are as follows:

Home

The Home page is the central connection page on the Local Agencies Portal. It is the first page that is seen when logging into the site and from this page users can navigate to other content hubs. On the home page users will find:

- Communications – a list of important communications sent by CSD to CSBG Agencies and Local Service Providers.
- Upcoming Events – a list of events that Agencies may attend.
- CPNs / CPAs – a list of CSD Program Notices and CSD Program Advisories.
- Program Highlights – a link to a success story about communities and individuals helped by CSD programs.

CSBG

The CSBG content hub provides a central location for CSBG Agencies to access information about their CSBG contracts and program guidelines. The CSBG landing page contains the following content:

- Quick Links – a list of links to frequently used or valuable CSBG information.
- Communications – a list of important CSBG related communications.
- Upcoming Events – a list of events for CSBG providers.
- Monitoring – a link to the CSBG monitoring page.
- Meetings – a list of links to common, recurring CSBG meetings.
- Staff Directory – a link to the CSBG CSD Staff Directory.

Additionally, from the CSBG content hub, a new series of content tabs are available for users. These tabs are as follows:

- Contracts – this content tab provides access to current and past CSBG contract documents.
- Forms – this content tab provides a list of important CSBG forms.
- Resources – this content tab provides a list of resources that can be valuable to CSBG providers.
- Training – the training content tab provides access to a list of webinars, presentations, and materials from past CSBG training events and provides a list of any upcoming trainings.

Energy

The Energy content hub provides a central location for Energy Local Service Providers to access information about their Energy contracts and program guidelines. The Energy landing page contains the following content:

- Quick Links – a list of links to frequently used or valuable Energy information.
- Communications – a list of important Energy related communications.
- Upcoming Events – a list of events for Energy Local Service Providers.
- Weatherization – a link to the Weatherization page which contains resources to assist providers that offer Weatherization services.
- Meetings – a list of links to common, recurring Energy meetings.
- Energy Contacts – a list of links to useful CSD contacts.

Additionally, from the Energy content hub, a new series of content tabs are available for users. These tabs are as follows:

- Contracts – provides access to current and past Energy contract documents.
- Forms – provides a list of important Energy Contract forms.
- Resources – provides a list of valuable Energy Contract resources.

- Training – the training content tab provides access to a list of webinars, presentations, and materials from past Energy training events and provides a list of any upcoming trainings.

Reporting

The Reporting content hub provides a central location where CSD providers can find details on contract reporting requirements and resources. From this hub, users can find links to CSD reporting applications and documents outlining CSD's reporting processes.

The Reporting hub landing page contains the following content:
- Quick Links – a list of direct links to CSD reporting applications.
- CSD System Notifications – a list of advisories about CSD applications and technology services.
- Upcoming Events – a list of reporting related meetings and events.
- Weatherization Reporting – an overview of Weatherization Reporting and a link to the Weatherization Reporting page.
- Utility Assistance Reporting – an overview of Utility Assistance Reporting and a link to the Utility Assistance Reporting page.
- Expenditure Reporting – an overview of Expenditure Reporting and a link to the EARS expenditure reporting system.
- Historic Preservation Online (HPO) – an overview of Historic Preservation Reporting and a link to the HPO application.
- Technology Steering Committee – an overview of the Technology Steering Committee history and a link to the Technology Steering Committee page.

Like the other content hubs, the Reporting content hub also contains a series of new content tabs which users can access:
- UA Reporting –provides an overview of the Utility Assistance reporting process and offers the details and resources needed to guide Local Service Providers through the process.
- WX Reporting –provides an overview of the Weatherization reporting process and provides the requirements that need to be met while reporting, as well as additional resources to assist in the process.
- TSC –provides an overview of the Technology Steering Committee history and responsibilities, and provides links to past Committee meeting Agendas, Handouts, and Minutes. Additionally, the page will also contain current proposed reporting changes for Committee review.

Section 4: Password Reset and Recovery

The following step-by-step guide describes the steps for users of the CSD Local Agencies Portal to reset their password. Users will be prompted to reset their password upon first Sign in.

Please note, when choosing a new password, it must meet the criteria outlined in **Step 8**.

Step 1: Open a modern web browser; click inside the web address box of the web browser, type **agencies.csd.ca.gov** and press the "Enter" key; when the Local Agencies Portal is displayed, click the "Login to Agencies Portal" button.
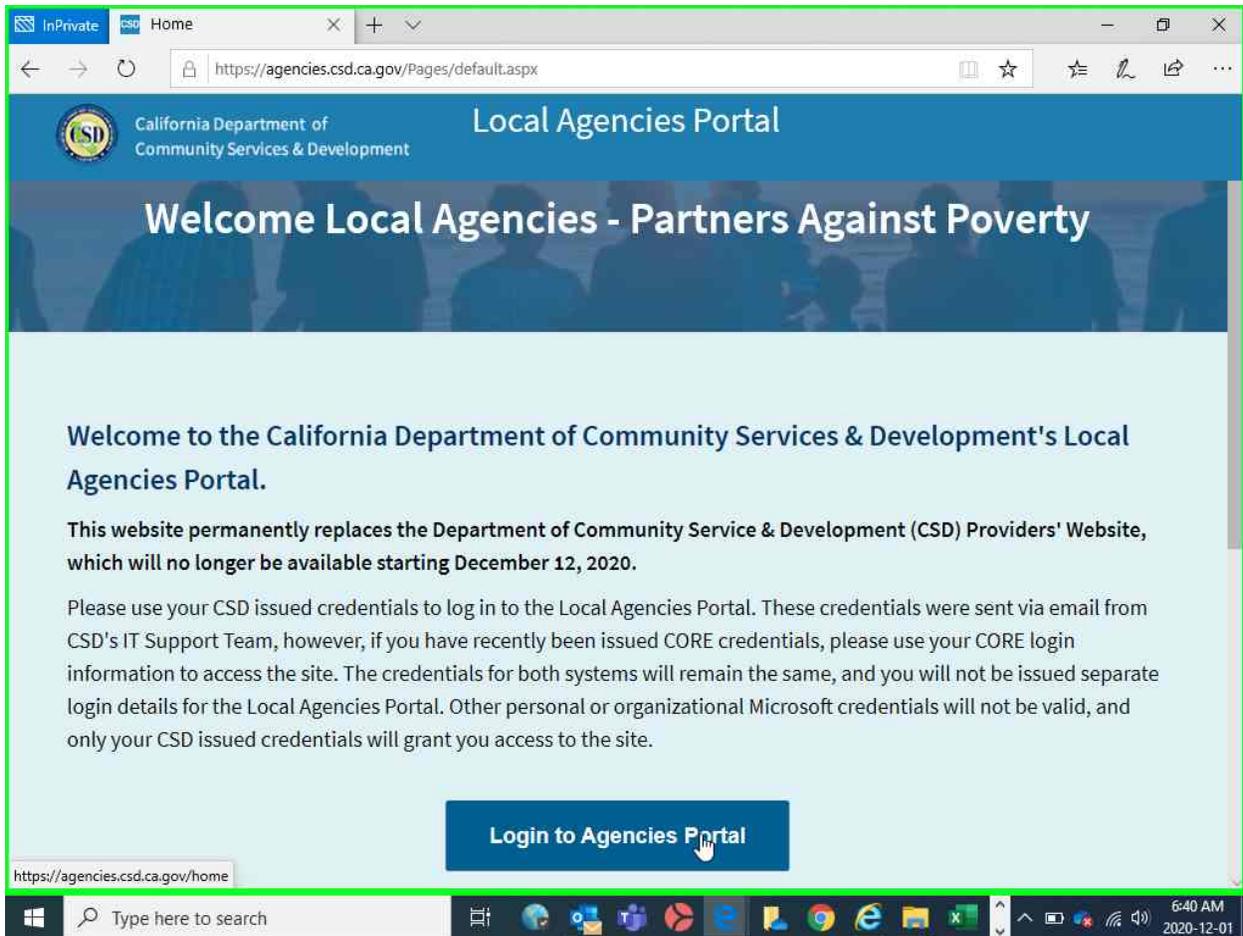
Screenshot of the landing page at agencies.csd.ca.gov

Step 2: When the Sign in page is displayed, click on the textbox below "Sign in" and enter your CSD supplied User ID – be sure to include the "@csd.ca.gov" (e.g.,77777TUser@csd.ca.gov) – then click "Can't access your account?"
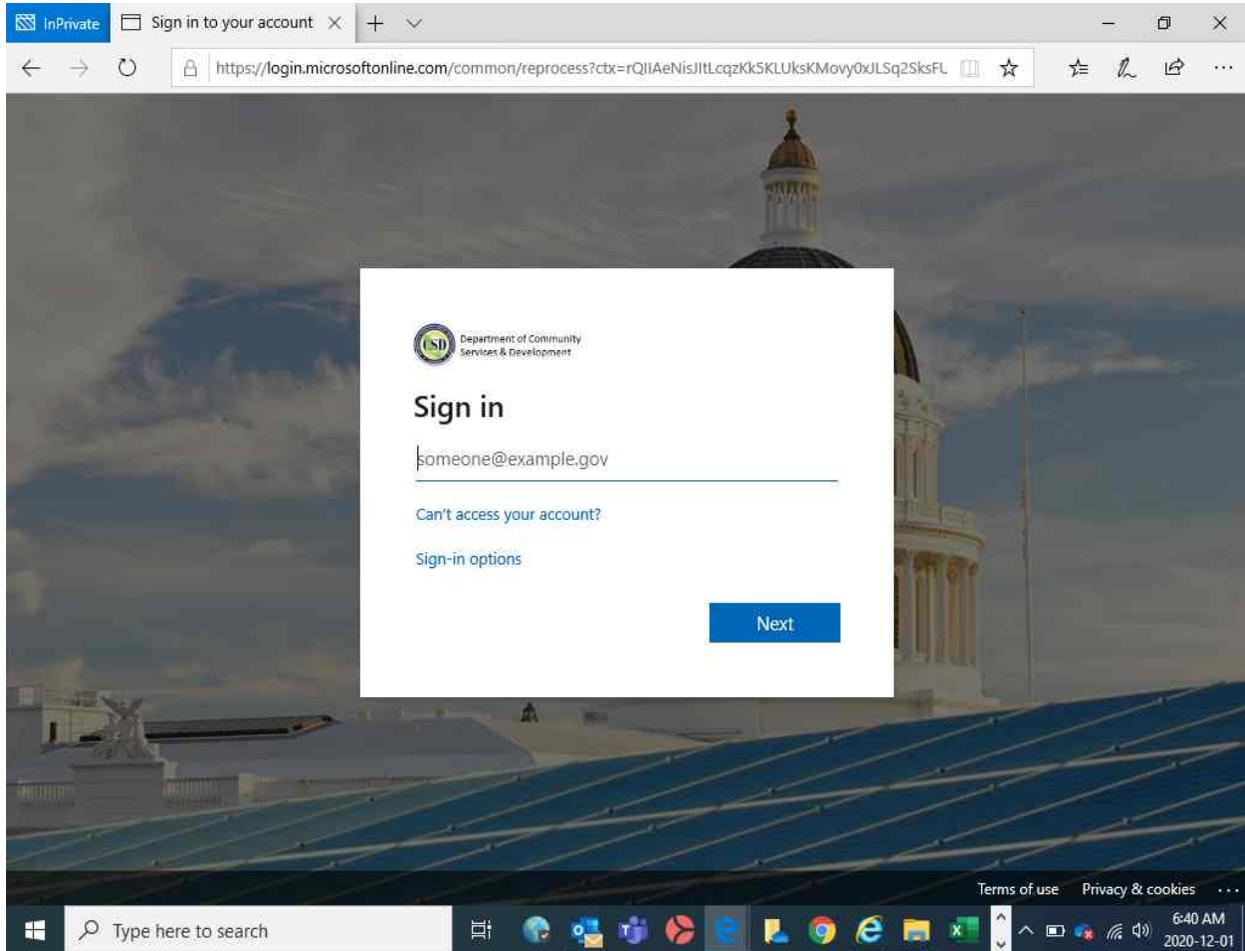
Screenshot of the Sign In page
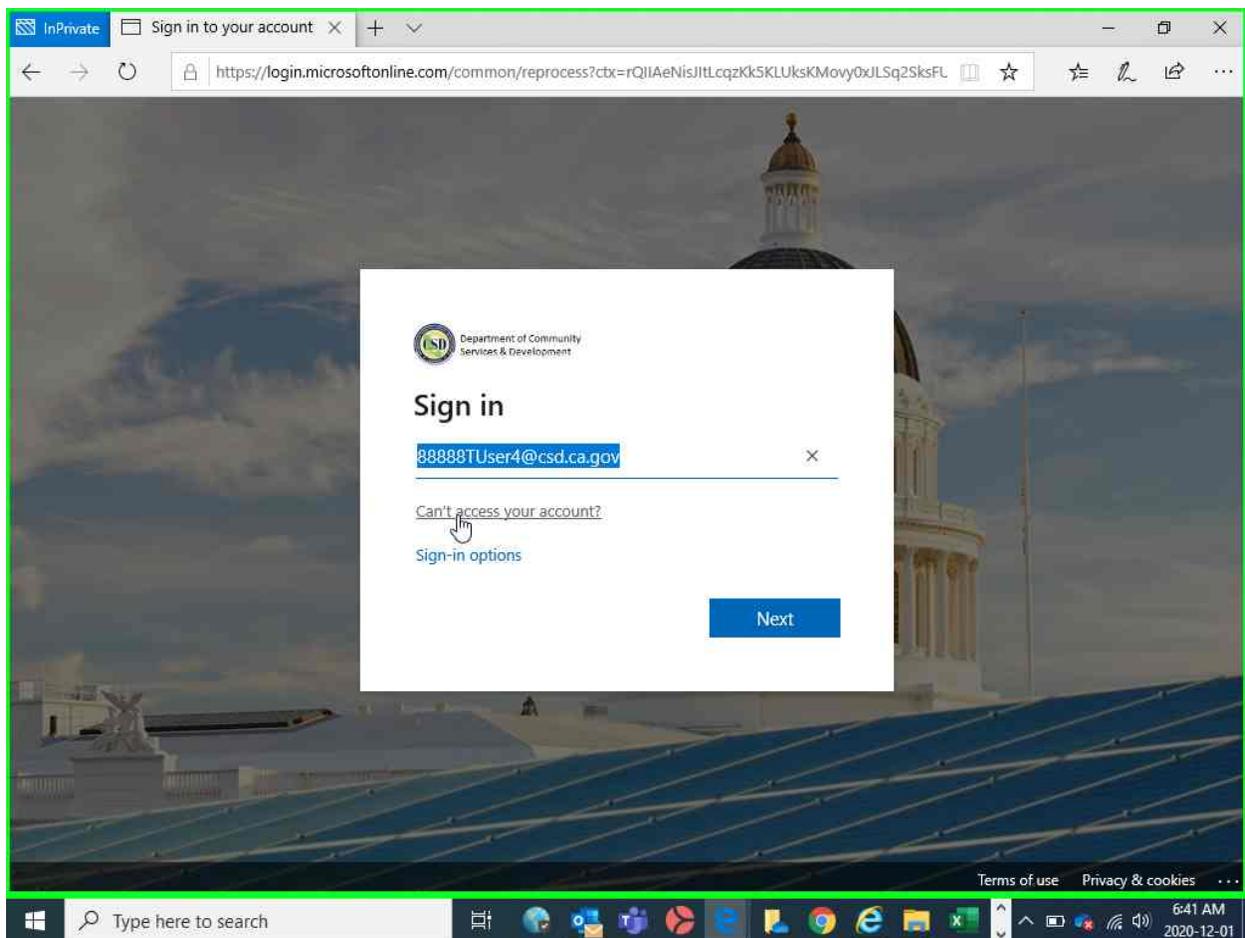
Screenshot of the Sign In page with a sample Username entered

Step 3: When the "Which Type of Account do you need help with?" page is displayed, choose "Work or school account Created by your IT department".
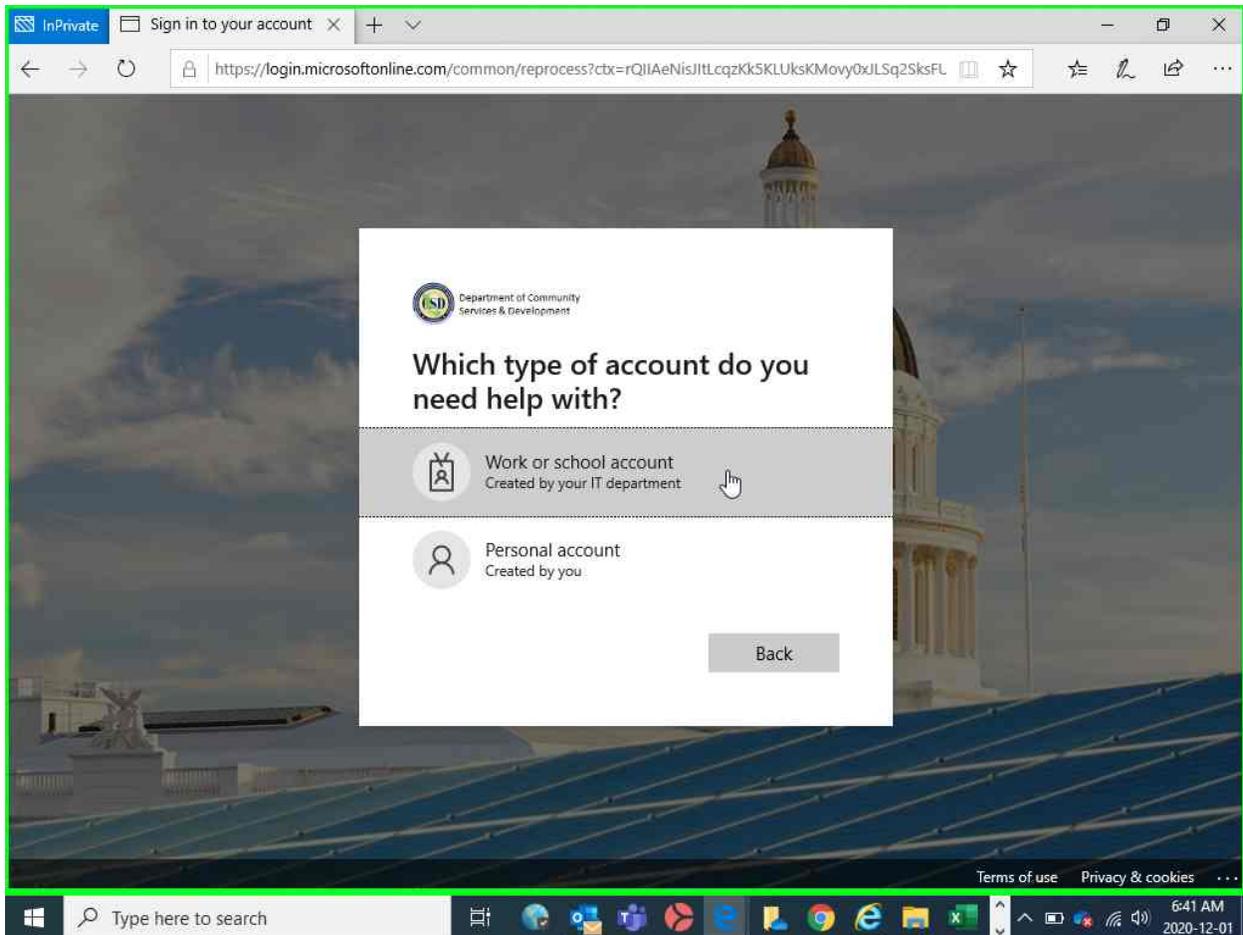

Screenshot of Choose "Which type of account do you need help with?" page

Step 4: When the "Get back into your account – Who are you?" page is displayed, enter your CSD supplied User ID – be sure to include the "@csd.ca.gov" (e.g.,77777TUser@csd.ca.gov). Then enter the letters and numbers displayed in the CAPTCHA below the User ID field (if entered incorrectly it will ask you to try again); then click "Next."
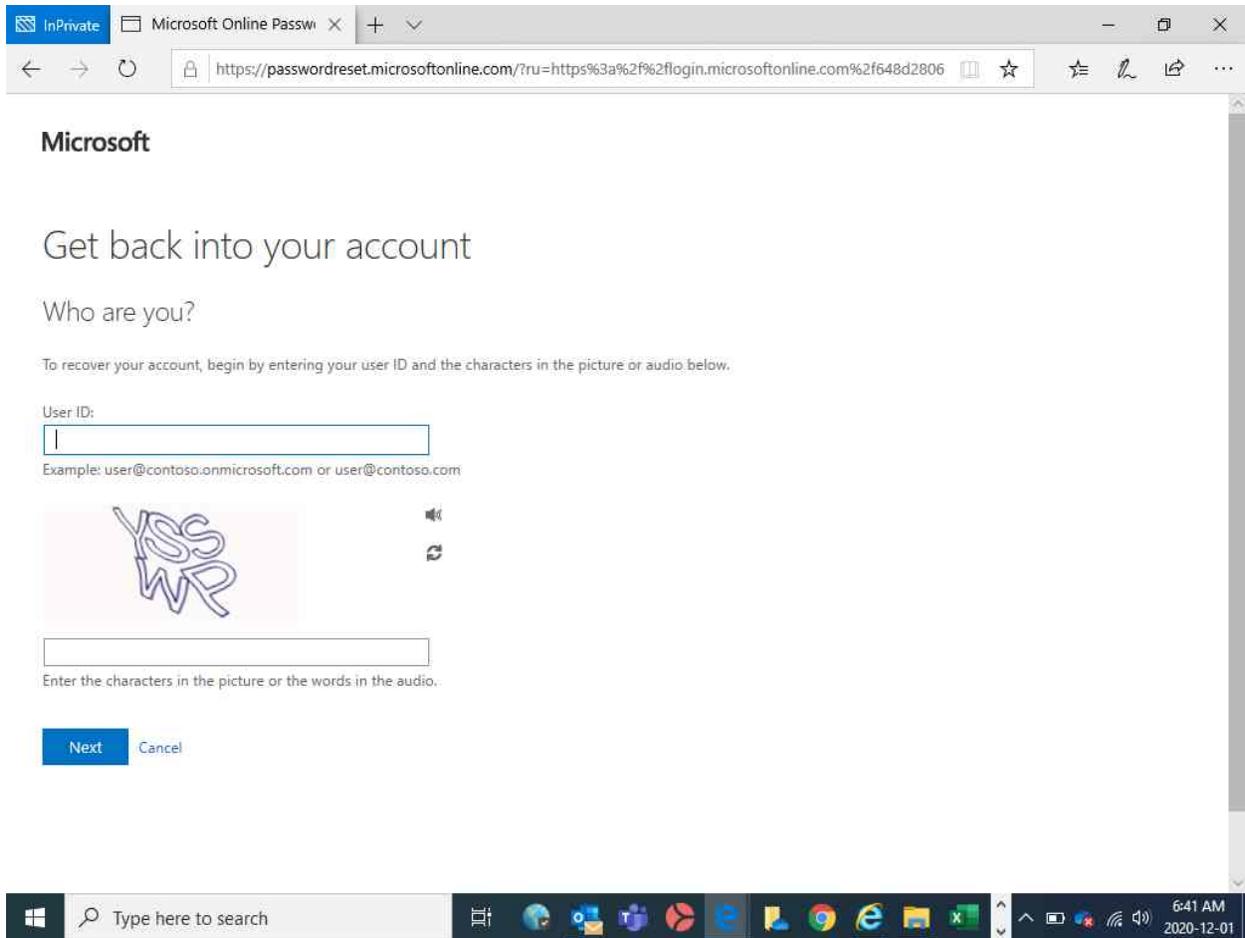
Screenshot of "Get back into your account – Who are you?" page
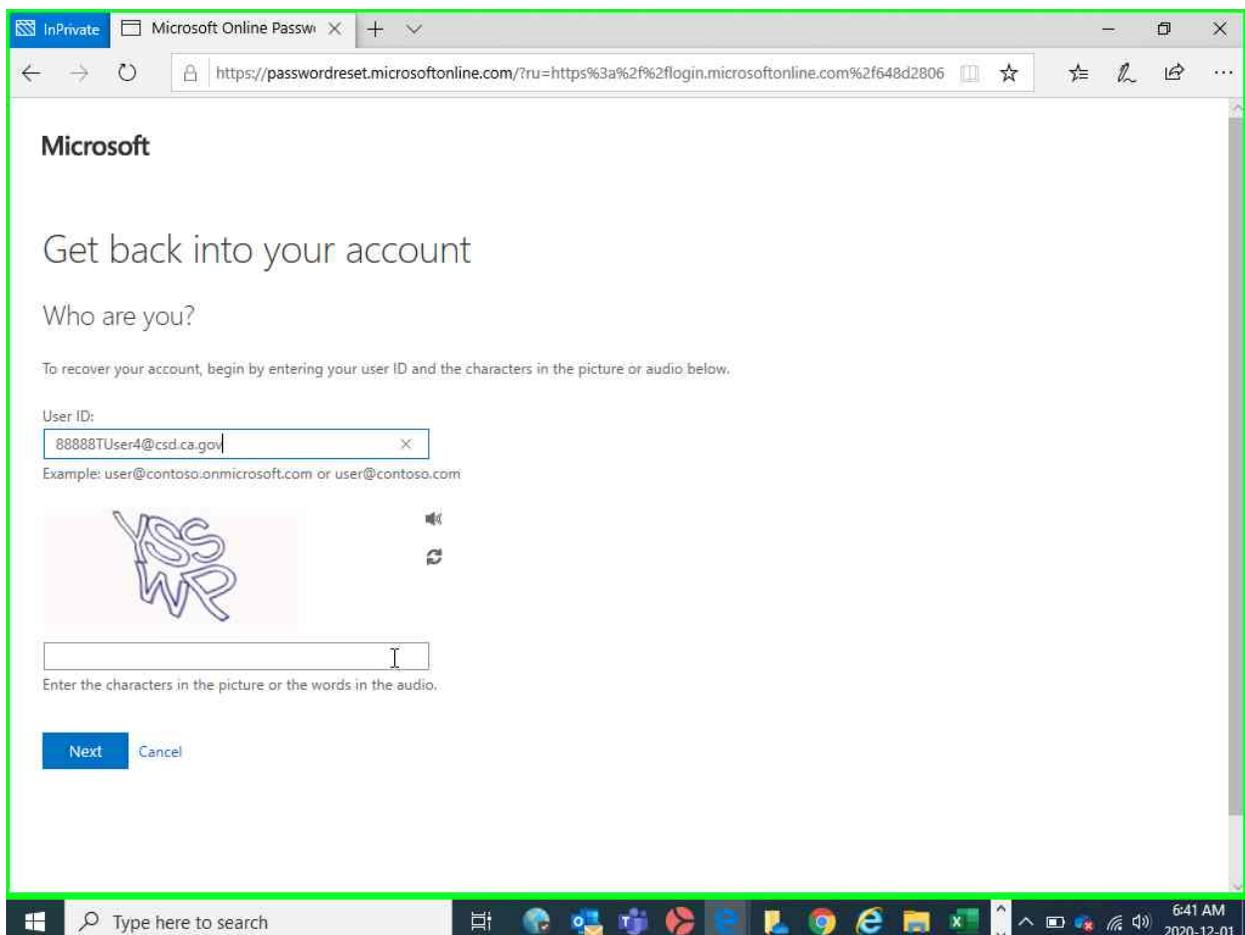
Screenshot of "Get back into your account" page with a sample Username entered
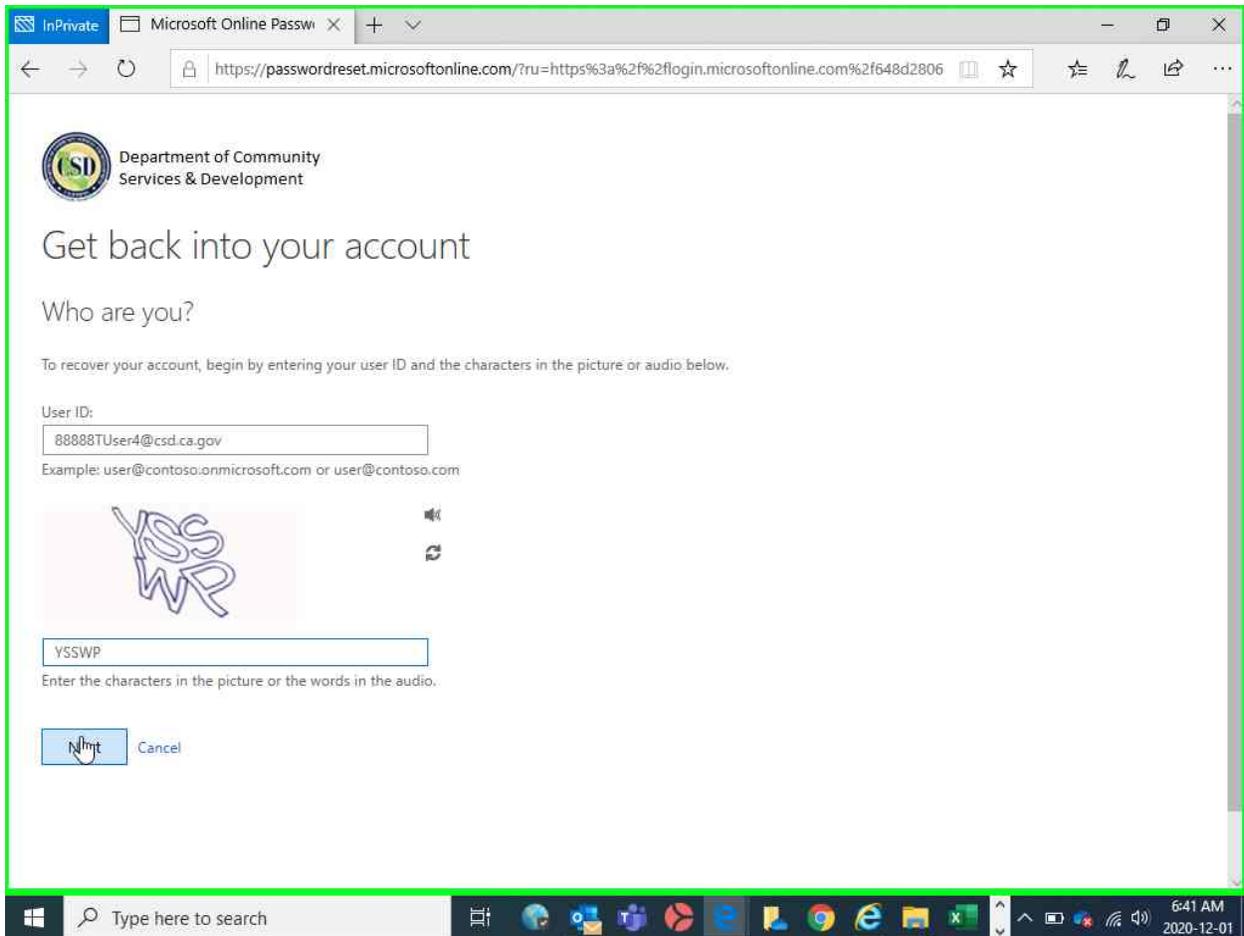
Screenshot of "Get back into your account – Who are you?" page with Captcha entered

Step 5: When the "Get back into your account – Why are you having trouble signing in?" page is displayed, choose "I forgot my password" (this is also the same option if you want to change your password), then click "Next".
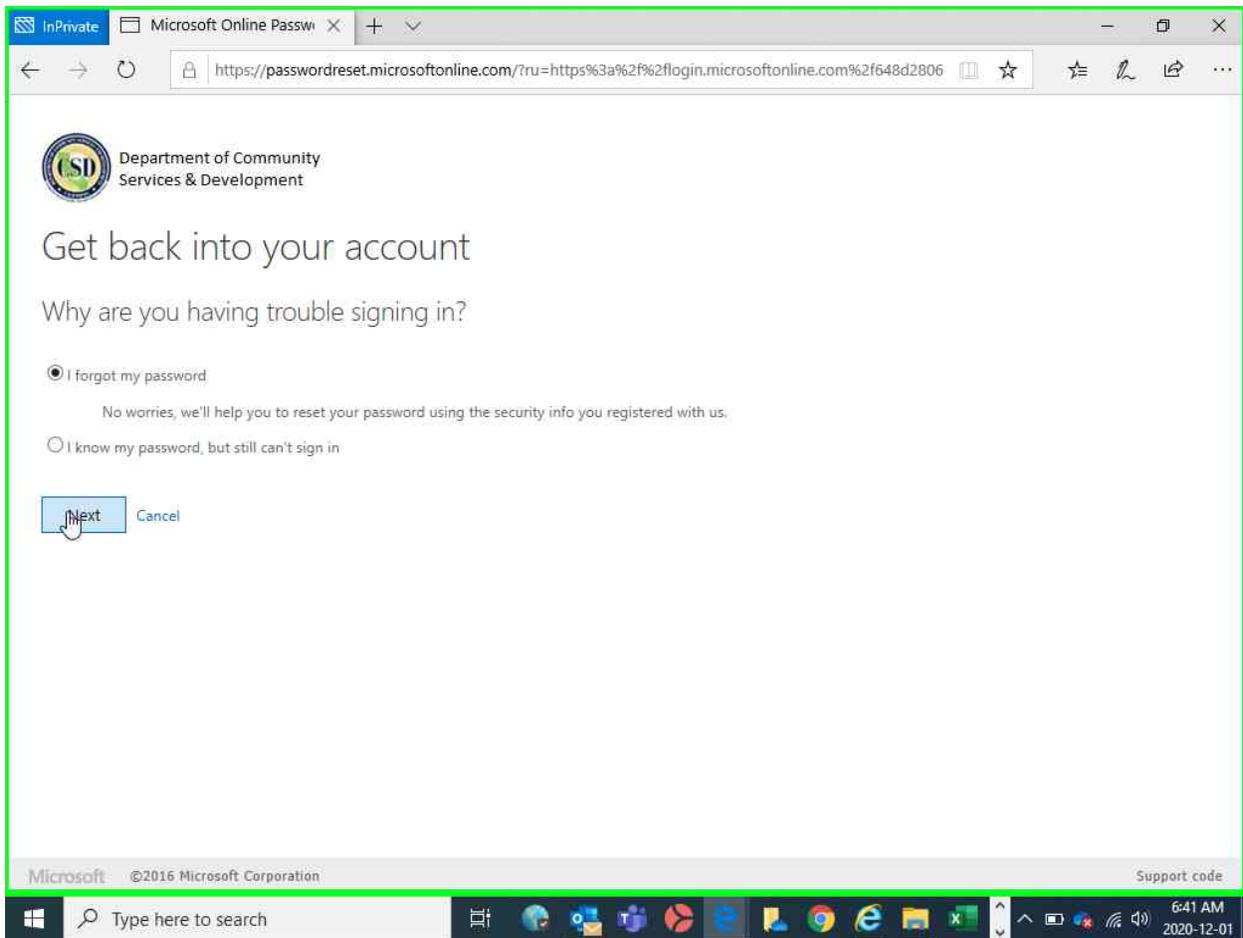
Screenshot of "Get back into your account – Why are you having trouble signing in?" page

Step 6: On the following screen the choice will be auto populated, verify the partial email address, then click "Email"; an email will be sent to the email address displayed.
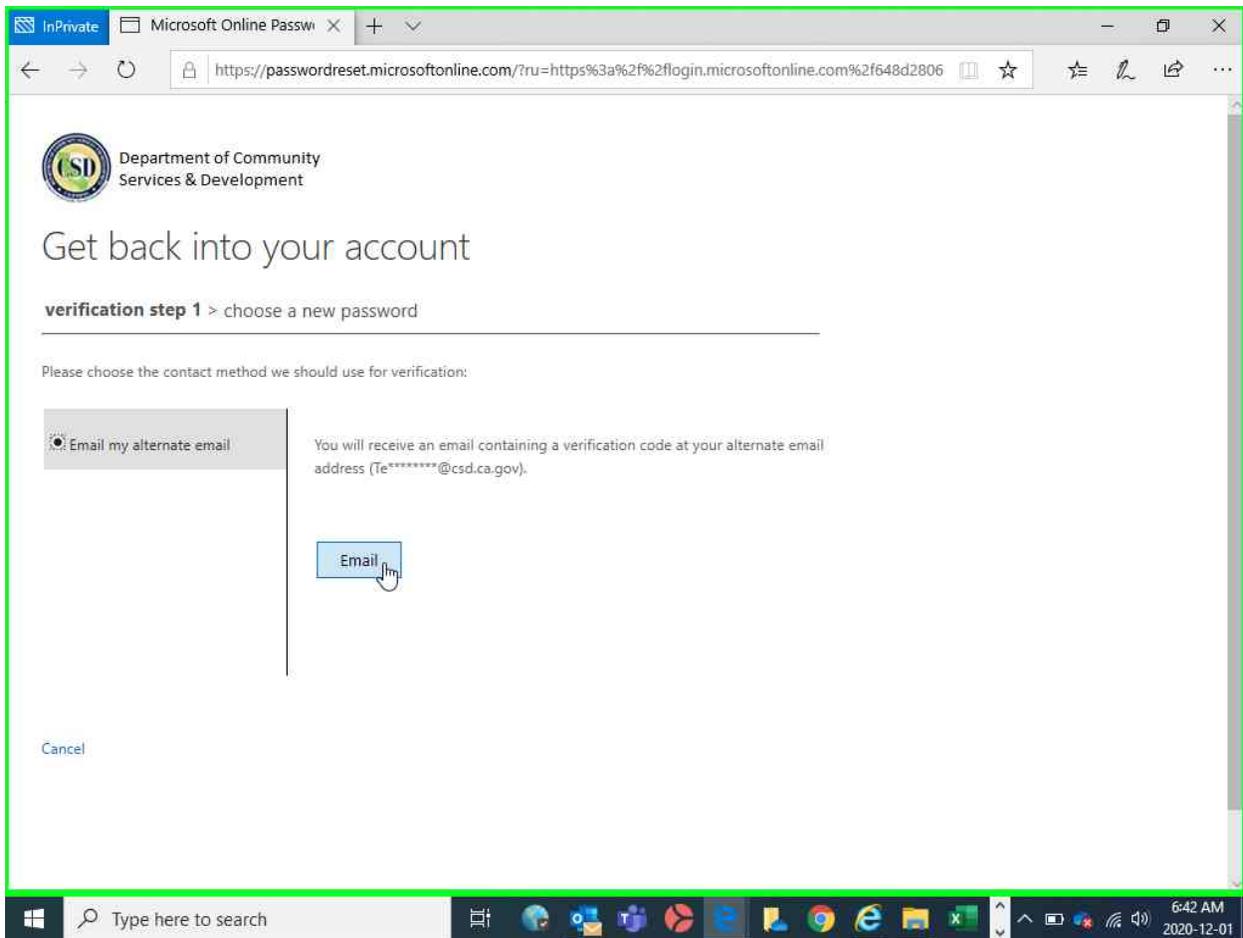
Screenshot of the "Get back into your account – verification step 1" page

Step 7: When you receive the email, retrieve the verification code from the email and enter the verification code in the textbox; then click "Next".
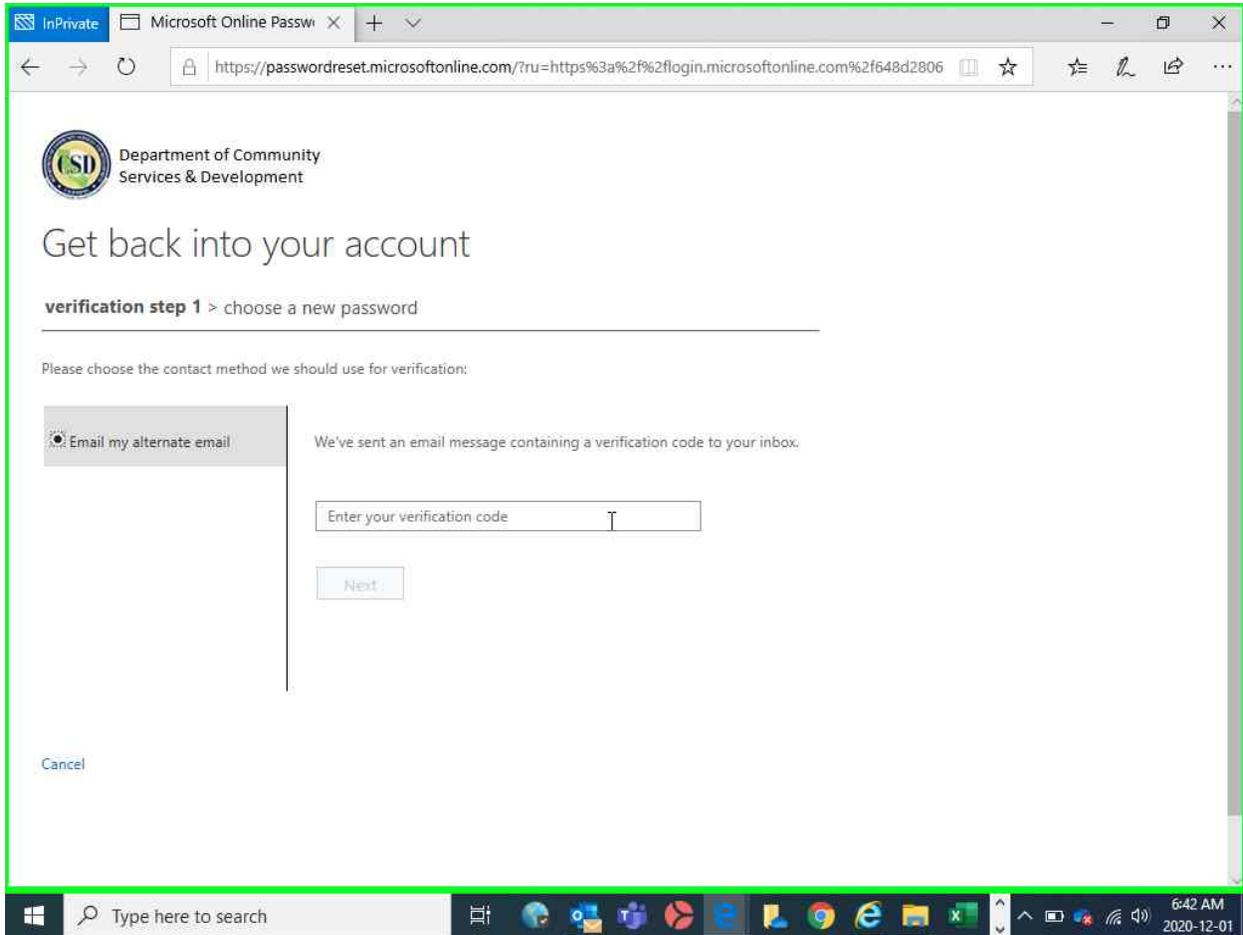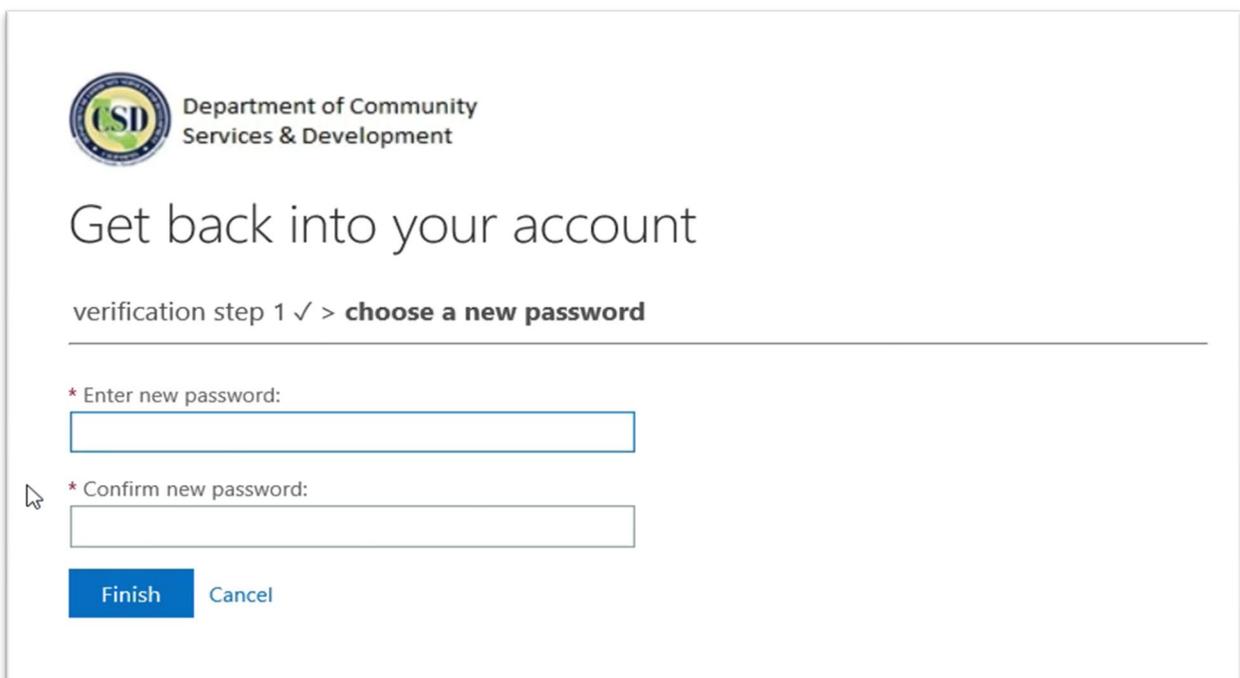

Screenshot of blank verification code entry
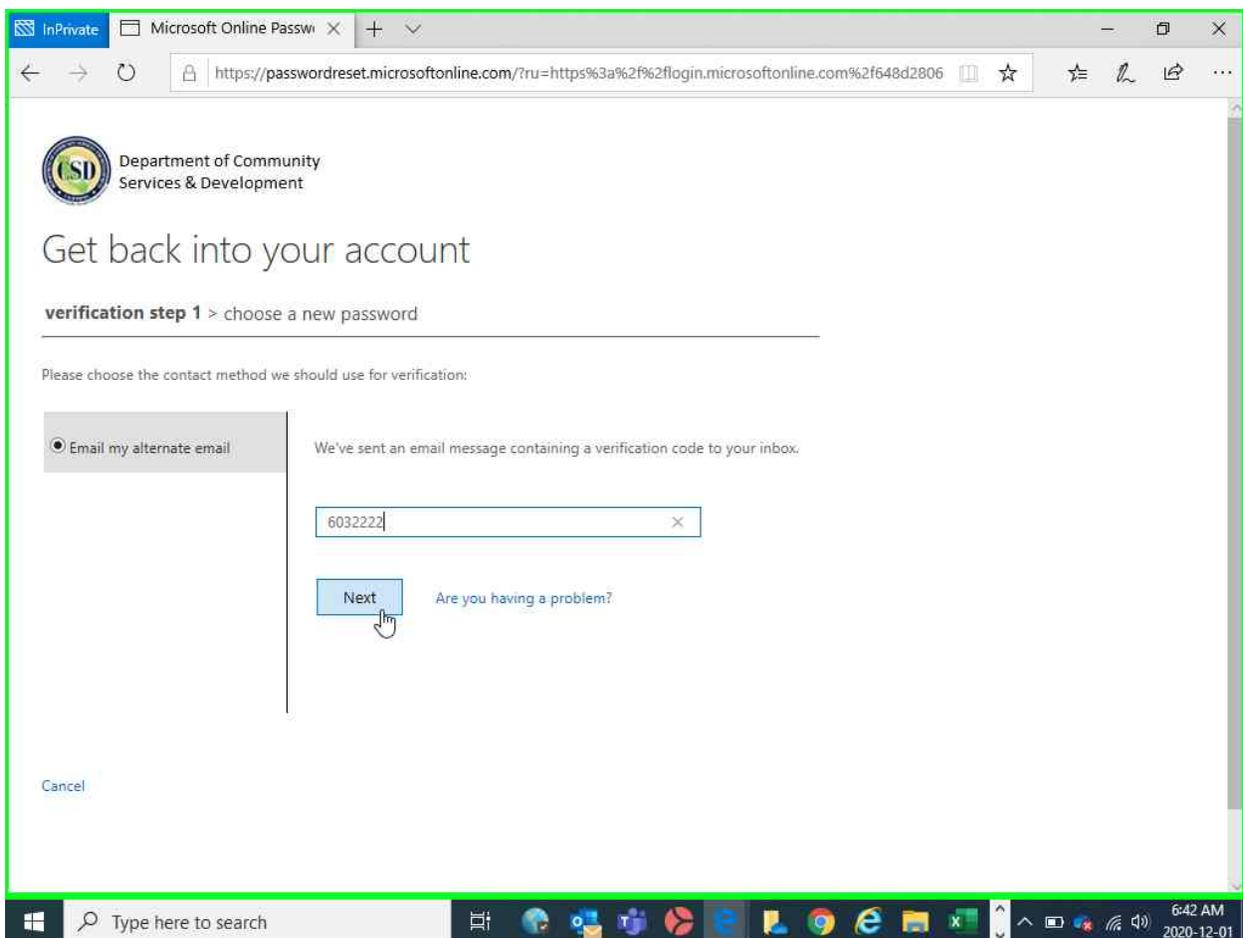
Screenshot of sample verification code entered

Step 8: Enter your new password, then confirm your password by re-entering your new password, and click "Finish".

**Please ensure your new password meets the following requirements:**

- Contains at least ten (10) characters.

- Contains at least three out of four character-types: uppercase letters, lowercase letters, digits, and special characters.

- Contains only letters (a through z), digits (0 through 9), and the following special characters.

- `~ ! @ # $ % ^ & * _ - + = ` | \ ( ) { } [ ] : ; " ' <>, . ? /`

- Does not contain the space ( ) character.

- Does not contain the user's full name or the User ID.

- Is not the same as the last 24 passwords used.

Notably, your password may only be changed once every 24 hours.

Screenshot of blank new password page
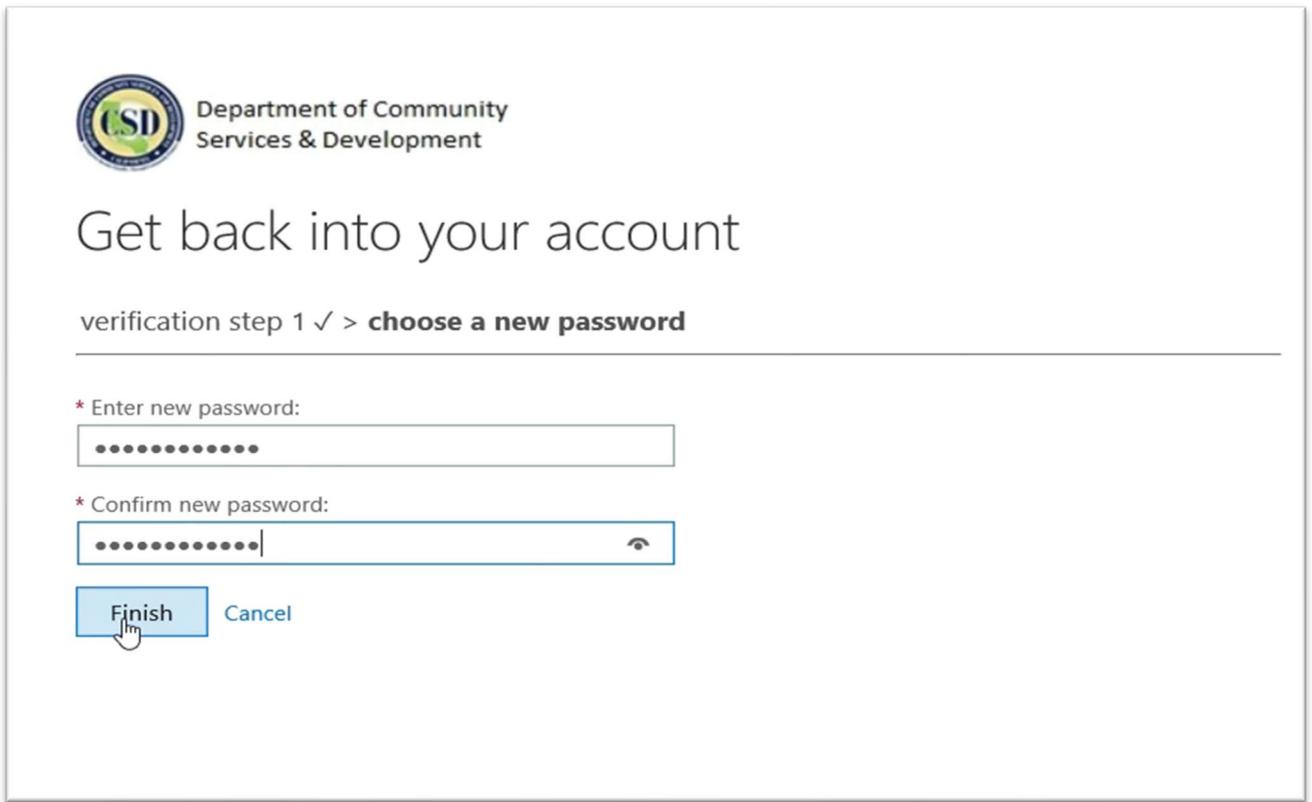
Screenshot of new password entered

Step 9: If the password change was successful, a confirmation message will appear notifying you that your password has been reset.

Screenshot of message notifying user that password has been reset

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Section 5: Troubleshooting Tips

This section outlines a few troubleshooting tips for addressing issues when using the Portal.

Scenario: Invalid User ID / username

Try these steps:

- Ensure you are using the CSD-provided User ID for the Portal, a sample username is "77777TUser@csd.ca.gov", and the portion including "@csd.ca.gov" must be included.

- Sign out, close all web browsers, then open a new web browser in privacy mode and try signing in again (please refer to the separate "Local Agencies Portal Supplemental User Guide" on **agencies.csd.ca.gov**.

> **Sample Error Message – Invalid User ID**
>
> Request Id: xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxxx
> Correlation Id: xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxxx
> Timestamp: 2020-12-01T23:00:56Z
> Message: AADSTS90072: User account 'non-CSD-user@noncsd.org' from identity provider 'https://noncsd.org/xxxxxxxx-xxxxxxxx-xxxxxxxx' does not exist in tenant 'California Department of Community Services and Development' and cannot access the application 'urn:sbetaproviders:federation'(SharePoint - Beta Sites) in that tenant. The account needs to be added as an external user in the tenant first. Sign out and sign in again with a different Azure Active Directory user account

Scenario: Incorrect password

Try these steps:

- Ensure the "caps lock" on your keyboard is off, passwords are case-sensitive.

- Reset your password following the steps in Section 3.

Scenario: Did not receive the password reset email

Try these steps:

- Wait for up to 3 minutes, sometimes network conditions and email security delays email delivery.

- Check your email junk or spam folders.

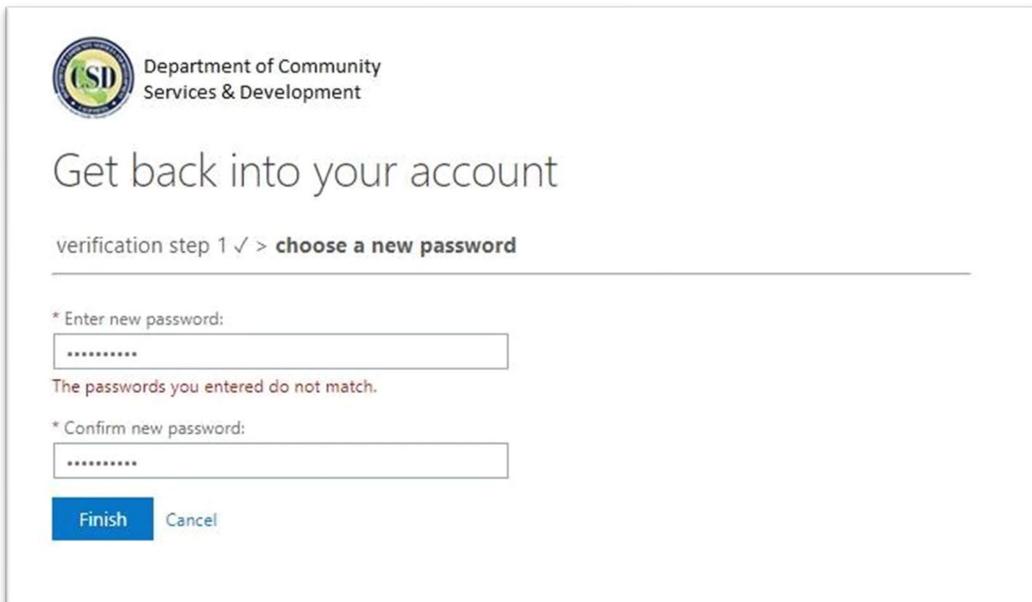**Scenario:** Not seeing the same content as another user

Try this step:

- Portal content is displayed based on active programs your agency is contracted to deliver (e.g., LIHEAP, CSBG, etc.). If you cannot access content for programs you know your organization is contracted to deliver, please see **User Assistance Contact**.

Scenario: Receiving a "passwords you entered do not match" message

Try this step:

- Ensure your new password meets the **Password Requirements**.

Notably, your password may only be changed once every 24 hours. If you changed your password once within the last 24 hours and need assistance without waiting till the next day, please see **User Assistance Contact**.

Screenshot of "passwords you entered do not match" message.

Section 6: User Assistance Contact

While CSD strives to provide helpful guides to access CSD applications, CSD cannot offer information technology support to your agency. Please contact your organization's IT Service Desk or IT Support for general computing issues. If you need assistance using the Local Agencies Portal, please email **energy.helpdesk@csd.ca.gov**.

If you need access to the Portal, please email **ExternalAccess@csd.ca.gov**. Be sure to include the following in the body of the email:

- First name
- Last name
- 5-digit Agency code, if known (e.g. 60###)
- Phone number
- Email address (for password reset and recovery)