Frequently Asked Questions

Part 2: Educator Dashboard: Student Account Management & Reports

This document is designed to answer educators' most frequently asked questions regarding Educator Accounts on CaliforniaColleges.edu, including our reporting tools and student account management.

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Legislative Compliance

What is AB 132, or the Cradle-to-Career System?

California's Cradle-to-Career System, established by AB 132, is intended to be a suite of user-friendly resources focused on early learning through K-12 and higher education, as well as on the financial aid and social services that help students reach their goals.

CaliforniaColleges.edu is currently the platform through which the Cradle-to-Career System provides planning and application tools for students, families, and educators to streamline the college and financial aid processes and monitor student progress. For more information, please visit the Cradle-to-Career System website.

Partner vs. Basic Accounts

What is a Partner Account?

A Partner Account allows you to use all of the tools available on CaliforniaColleges.edu.
- To be eligible for a Partner Account, you must be enrolled in or employed at one of our Partner Districts.

- Our Partner Districts have established a formal data-sharing agreement with California College Guidance Initiative (CCGI).
- The formal data-sharing agreement makes it possible for school districts to securely upload student transcript data into CaliforniaColleges.edu.
- Student transcript data is required for certain tools, such as the CSU and UC Eligibility Tools, as well as to import their verified "a-g" coursework and grades into the Cal State Apply application.

What is a Basic Account?

If you are not enrolled or employed by a Partner District, you can still sign up for a Basic Account. Students, educators, and other users who have Basic Accounts are able to use many of the tools on CaliforniaColleges.edu. Basic Account users are not able to access tools that require the upload of students courses and grades, such as the CSU and UC Eligibility Tools.

To view a functionality comparison between a Partner Account & Basic Account, visit the CaliforniaColleges.edu Resource Hub.

How do I know if I am a partner?

Want to find out if your school and district are already partners? Check it out here.

How do I become a partner?

To become a Partner District, a school district must first establish a formal data-sharing agreement with the California College Guidance Initiative. The formal data-sharing agreement makes it possible for a school district to securely upload student transcript data into CaliforniaColleges.edu. To ensure that Partner Districts have the support they need to successfully bring CaliforniaColleges.edu to their students, CCGI will provide them several forms of support throughout the implementation process.

What are the requirements for a data-sharing agreement with CCGI?

In order for a district to enter into a data-sharing agreement with CCGI, the district must demonstrate that it will:
- Utilize the same Student Information System (SIS) for the next 1-2 years
- Be responsive to CCGI's support to align their local "a-g" course list with the University of California Office of the President (UCOP) Course Management Portal (CMP)
- Serve students in the 9th-12th grades at one or more school sites
- Be able to identify points-of-contact for implementation, data, and contracting

Once a district has determined that it is prepared to bring CaliforniaColleges.edu to their students, it can submit an Intent to Partner form. We encourage districts that are interested in bringing CaliforniaColleges.edu to their students to Contact Us to learn more about the platform and implementation process.

Student Account Creation and Registration

How are student accounts created in Partner Districts?

Signing into CaliforniaColleges.edu is the most important step of using the platform for both students and educators.
- To create Student Partner Accounts, Partner Districts must regularly upload student transcript data to CaliforniaColleges.edu.
- Student Partner Accounts are created and updated based on the student transcript file that districts upload to CaliforniaColleges.edu.

- Once the Student Partner Accounts have been created, students can then register their accounts and sign in to CaliforniaColleges.edu.

How are student accounts created in All Other Districts?

For all other districts, we recommend creating Student Basic Accounts via the batch creation process.

- The batch creation process allows you to mass import student information through a CSV file instead of manually inputting student information one by one.
- When you batch-create Student Basic Accounts, you must provide each student's Statewide Student Identifier, which is key to tracking the status of each student's college and financial aid applications.
- Please note, if a new student enrolls in your district, you must create a new Basic Account for that student and the student must register the new account in order to use CaliforniaColleges.edu.

For more information about creating Basic Student Accounts, visit the [CaliforniaColleges.edu Resource Hub](#).

My student is "Pending Registration" and I cannot reset their password, how do I reset their password so they can access their account?

Students who have the account status as "Pending Registration" must proceed in registering their account. This is the process of setting up their account by attaching a username and password. Educators cannot reset passwords for students who are Pending Registration as there is no password to reset.

How do students' register their account?

Encourage your students to visit the Registering Your Student Account page on the [CaliforniaColleges.edu Resource Hub](#).

How are students promoted year after year?

For our Partnered Districts, grade level promotion is a process that happens when the district submits their last transcript file to CCGI. If you are noticing incorrect information like a student's grade level, please reach out to your district Data Lead directly.

Can I edit a student's account information?

For our Partner Districts, all student information comes directly from your district's SIS and data files submitted to CCGI, therefore; changes to student records must be corrected at the district level by your data team. Please reach out to your District Data Lead for support.

Basic account holders (not partnered with CCGI), Site Admins, and Counselors can create, edit, and update student accounts, as needed. They can do so by navigating to the Edit Students tab. For more information on our User Roles, check out our [User Role](#) guide.

Student Account Management

How do you reset student passwords?

There are three options for resetting student passwords:

- **Option 1: Via Email**
  The student(s) will get an email with a link to reset their password(s). The link expires in 24 hours. When the student(s) click the link, they go to CaliforniaColleges.edu and are asked to reset their password according to these requirements.
  - Minimum of 9 characters

- Can't include student name, email, or previous passwords
- Can't be a word found in the dictionary

- **Option 2: Via Text/SMS**
  If enabled, student(s) get a new password by text/SMS. Once they sign in with their new password, they can go to My Account to change their password to something they can remember. Students who haven't enabled text/SMS will get an email with a link to reset their password.

- **Option 3: Manually (Recommended)**
  Educators can enter a temporary password that is a minimum of 9 characters and isn't a word found in the dictionary. Once they reset the password(s), they must securely share it with the student(s). The student(s) can then sign in to CaliforniaColleges.edu using the temporary password.
  - Once the student signs in with their temporary password, they'll be prompted to reset to a new password
  - If the manually set password isn't provided to the student(s), they will not be able to sign in

What do I do if my Educator Dashboard is missing some of my students?

If your school site is within a partner district, your transcript files are uploaded directly by the district. If you do not see your student on the Educator Dashboard, reach out to your District Data Lead and ask them to include the student on the next transcript upload. After the upload, the student should be reflected on the Educator Dashboard. Transcripts are uploaded on a continuous basis.

If you are not within a partnered district, Educators with educator accounts can create single student accounts from their Educator Dashboard.

Can students access the resources on CaliforniaColleges.edu after they graduate?

Yes! Students can still access their accounts and utilize the resources on CaliforniaColleges.edu after they graduate. We recommend that students add a second email by going to their My Account page. That way, students can reset their password even if they lose access to their school email.

How do I change a student's email or username?

At this time, students are the only ones who have access to change their email and username. Encourage your students to watch our video on how to change their email or follow instructions below.

To update their email, have students:
1. Sign in to their account.
2. Click the Person icon on the top-right corner of the page.
3. Then click My Account.
4. In the Student Info section, click Edit.
5. Enter their updated email.

Caseloads

What are Caseloads?

Caseloads is the tool on CaliforniaColleges.edu for our Partnered Districts that enables subsets of students, known as caseloads, to be attached to their appropriate educator or counselor.

Where can I find Caseloads on CaliforniaColleges.edu and who has access to Caseloads?

In order to access Caseloads, you must have a Partner Educator Account and be a District or Site Admin. District and Site Admin user roles can set up, assign, and manage caseloads, while Educator and

Counselor-Caseload Only user roles can view caseloads assigned to them. District or Site Admins can find Caseloads on the Educator Dashboard under "Manage Educator Accounts."

Where can I find caseloads that have been assigned to me?

Educators will be able to find their assigned caseloads under "Manage Student Accounts," as well as under "Manage Reports" by selecting the filter with the appropriate Caseload Title.

How many educators can be assigned to a caseload?

Multiple educators, registered or unregistered, can be assigned to a caseload. However, an educator must have a registered account in order to view their caseload(s).

For more information on Caseloads check out our Informational Guide and Caseloads Video.

Reporting Tools

How do you run a report?

Educators can run a variety of reports to track and manage student accounts and progress. Please see step-by-step instructions below:

1. Log into your CaliforniaColleges.edu account and navigate to your Educator Dashboard.
2. Click "Report Management."
3. Select the report category and report type.
4. You can use filters at the top to view students who match certain criteria, such as gender, ethnicity, etc. To remove filters, click "Reset Filters."
5. Select "Run Report."

What report categories are available to educators?

We have the following report categories:
- Academic
- Accounts
- College
- Career
- Financial Aid
- My Plan Activities

Why am I unable to view some of the Filters?

Filters such as ethnicity and special population are a district wide decision to include. Some districts decide not to include certain filters in the reporting tools.

Can I view a specific Caseload in the reporting tools?

Yes! If educators are assigned to a Caseload, they can select the caseload they would like to view in the Caseloads filter section.

Can I download and use the reports for tracking purposes?

Educators with an Educator Account on CaliforniaColleges.edu can pull reports at any time. Our reports are available in XLSX or CSV formats. Excel files allow for ease of collaboration as well as filtering and sorting of data.

Educator Accounts and Educator Account Management

How do I obtain an Educator Account?

It's possible that an account may have already been created for you. To check if you already have an account on the platform, follow the steps below:

- Click Register Your Account.
- Select Educator and enter the name of your district and school.
  - Once you enter your district provided email address and click Next, the system will look to see if there is an account associated with that email address.
  - If no account can be found, and you've confirmed you entered your information correctly, click the Educator Account Application link to submit your account request.

View our Requesting and Registering an Educator Account page on the CaliforniaColleges.edu Resource Hub for more information.

What is the Student Privacy Protection Agreement/Assembly Bill (AB) 1584?

A Student Privacy Protection Agreement (AB 1584 agreement) must be signed by a Superintendent or Assistant Superintendent. This agreement must be on file with CCGI in order to grant Educator Accounts to educators in other districts. Other school districts are those not partnered with CCGI.

AB 1584 authorizes Local Educational Agencies (LEAs) to enter into contracts with third parties to provide services for the digital storage, management, and retrieval of pupil records or to provide digital education software. Because the transfer of student data from your District to CCGI on CaliforniaColleges.edu is within the scope of AB 1584, our practice is to enter into an AB 1584 compliance agreement.

Can I create other Educator Accounts?

Educators with a Site Admin or District Admin account can create accounts for fellow educators, one at a time or multiple at once. Site Admin or District Admin can create accounts under Educator Account Management. Educators must then register their accounts within 60 days. After 60 days, if they still have not registered their account, the account will need to be recreated.

What is the difference between educator user roles?

Educator user roles have specific sets of permissions. Educators should be assigned a user role appropriate for how they will use CaliforniaColleges.edu. For a breakdown of each user role, please check out our guide here.

I need my user role changed, can this be updated?

Both Site Admins and District Admins have the ability to make necessary edits to other educators' accounts, including user roles. Please reach out to your Site or District Admin on the platform. If you are not sure who to contact, please submit a Contact Us form.

I moved to a different school. How can I update my account?

If you move to a new school site in the same school district, reach out to the administrator with a CaliforniaColleges.edu account at your new site so they can create an account for you. If you move to a new school site in a new district, notify your previous site that you're no longer there so they can delete your account. Then, at your new site, reach out to the administrator with a CaliforniaColleges.edu account so they can create a new account for you.

I need to reactivate my account. I had an account, or I remember someone setting one up for me, but now I can't sign in. What should I do?

When an account is set up for you, it must be registered within 60 days. Accounts not registered within 60 days of the account being created will be deleted. In this case, a new account will need to be created for you. Reach out to your district or school site administrator, or Contact Us.
To remain active, accounts must be signed into at least once a year. Accounts with a sign-in date of a year or longer will be deleted. To reestablish your account, a new account will need to be created for you. Reach out to your district or school site administrator, or fill out a Contact Us form.

Lessons

What are your 6th-12th Grade Lesson Plans?

CaliforniaColleges.edu lessons walk students step-by-step through creating an informed college, career, and financial aid plan. Students in 6th through 12th grades can complete grade-appropriate activities to help them smoothly navigate the transition from high school to college. In the coming years, all lessons on CaliforniaColleges.edu will be self-guided, just like the new financial aid lessons. Stay tuned!

Are any CCGI lessons AB 2015 compliant?

The 11th grade financial aid module "Understanding Financial Aid" consists of two lessons. Upon completion of both lessons, students will learn the financial aid content that fulfills the AB 2015 requirements and will be more prepared to apply for financial aid in 12th grade.

Do you have recommendations on how to use and implement the 6th-12th Grade lessons?

Our goals are to promote the highest level of cross-curricular collaboration possible and ensure that all educational stakeholders are invested in creating clearer pathways between K-12 and higher education. To meet this need, Lessons & Activities Sample Action Plan makes it easy for educators to access our unique suite of student-focused college, career, and financial aid planning curricula and tools. The matrix provides educators with direct hyperlinks to resources sequenced by grade level to support interdisciplinary implementation.

Training

Register for a Virtual Training Session Today!

The Virtual Training experience is a critical first step in successful implementation. To ensure that you acquire the knowledge and skills necessary for successful platform usage, we offer training support from the foundational to the advanced. We recommend users attend the full series of training sessions to best learn how our tools will streamline your approach to college readiness and preparation for your students.

Our Administrator series invites district and school decision makers to understand the scope of our tools and its capacity to elevate your college readiness priorities.
Part 1: Elevating Your College Readiness Programming w/CaliforniaColleges.edu
Part 2: Aligning Your Course List with the Course Management Portal (CMP)

Our School Counselor series benefits practitioners with an interactive experience which includes a granular overview of platform tools followed by platform navigation, focused exploration and Q&A.
Part 1: Using CaliforniaColleges.edu: College & Career Exploration with Students
Part 2: Educator Dashboard: Student Account Management & Reports
Part 3: College Application Process Using CaliforniaColleges.edu (CCC/CSU/UC)
Part 4: AB 469 Alignment: Using Financial Aid Lessons & FAFSA/CADAA Applications

Click here for [Virtual Trainings for Educators and Administrators](#).

Help with CaliforniaColleges.edu

After bringing CaliforniaColleges.edu to their students, school districts will continue to receive year-round support from the California College Guidance Initiative staff to ensure that the district, educators, students, and parents are able to effectively use the tools on the platform.

Educator Help Page

Visit our [Educator Help Page](#) for frequently asked questions in the areas of:
- Accounts
- Managing Student Accounts
- Managing Other Educator Accounts
- Lessons
- Assignments
- Resources

Student Help Page

Visit our [Student Help Page](#) for frequently asked questions in the areas of:
- Account Management
- Using CaliforniaColleges.edu

Demo Accounts

Did you know you can request a CaliforniaColleges.edu demo account? If you are interested in viewing the platform in a student's view or are interested in a demo Educator Account, please [Contact Us](#).

Contact Us

Educators, whether they have Basic or Partner Accounts, will have access to responsive, individualized support for any platform-related questions or issues they may encounter. Send us a message through our [Contact Us form](#). We do our best to respond within one business day.