

LCAP eTemplate User Guide

Part 1: Access and User Management

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California Department of Education

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LCAP Electronic Template System Overview

LCAP Electronic Template System Objective

As a requirement of the Local Control Funding Formula (LCFF), all county offices of education (COEs), school districts, and charter schools are required to prepare a Local Control and Accountability Plan (LCAP) to describe how they intend to meet annual goals for all pupils, with specific activities to address state and local priorities identified pursuant to *Education Code (EC)* Sections 52060(d) and 52066(d).

Local Educational Agencies (LEAs) may use the LCAP Electronic Template System (eTemplate) to electronically create and manage their LCAP and to submit their LCAP for review and approval, as applicable. The system is also used by program and fiscal services staff at the California Department of Education (CDE) to review and approve COE and single-district county LCAPs.

Guide Objective

The objective of this guide is to provide eTemplate users with the knowledge and understanding needed to navigate efficiently through the eTemplate system and to enter or view data.

This guide is divided into three parts and is designed to assist users:

- Gain access to the eTemplate system and manage user access (Part I)
- Navigate the system, enter and edit data, generate an LCAP, and submit an LCAP for review and approval (Part II)
- Review an LCAP in the eTemplate system (Part III)

This guide is partitioned into sections relevant to the user and the user's roles.

This guide does not provide program guidance regarding how to complete an LCAP; it provides the necessary guidance to navigate and enter data into the system.

Using the Guide

This guide is designed for users who have a basic understanding of the requirements, terminology, and statutes related to the LCAP.

This guide also assumes the user is familiar with basic computer functions and internet browser functionality.

At the end of each section of the guide is a link to the Table of Contents. To return to the Table of Contents press the **Ctrl** key, then click on **Return to Table of Contents**.

Additional Help

For specific questions or problems related to the system, additional help is available from staff. Support can be requested by:

- Emailing etemplate@cde.ca.gov
- Calling the Local Agency Systems Support Office at 916-319-0809.

Additional Information

Additional information about LCFF, the LCAP, and related links can be found on CDE's Local Control Funding Formula Web page at <http://www.cde.ca.gov/fq/aa/lc/>.

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Centralized Authentication System Access

In the Centralized Authentication System (CAS), users self-register new user accounts and update existing user accounts for the purpose of establishing login data to gain online access to various systems of the CDE. In order to access the eTemplate, a user must have a user name and password. In order to obtain a user name and password, a user must register in CAS. CAS is a separate system from the eTemplate system.

Links to CAS can be found on the eTemplate system Logon page at:
<http://www2.cde.ca.gov/lcap/logon.aspx>.

New User Registration

New Registration is one of the CAS User Links found on the eTemplate Logon page. Click on the **New Registration** link to get started.

Local Control and Accountability Plan (LCAP)

Logon

Logon

Username:

Password:

Submit

Centralized Authentication System (CAS) User Links: [Update](#) | [New Registration](#) | [Forgot Password](#)

NOTICE: You must be a registered user in the State of California Department of Education (CDE)'s Centralized Authentication System (CAS) to logon. Use the links above to create a new registration or update your existing registration to proceed.

Questions: Local Agency Systems Support Office | etemplate@cde.ca.gov | 916-319-0809

After clicking on the **New Registration** link on the eTemplate Logon page, the user is directed to the CAS Registration page.

Centralized Authentication System (CAS)

Registration

Instructions:

- The fields marked with an asterisk (*) are required
- Passwords expire every 90 days
- Cannot reuse last 24 passwords
- Passwords must have at least 8 characters including letters, numbers, and special characters (!, @, #, \$, %, ^, *, -, +, =, ~, ?)
- Passwords must contain at least one uppercase letter, at least one lowercase letter, and at least one special character
- The format for Telephone and Fax numbers is 555-5555

Add the new user's information to the three sections of the Registration page: Association Type, User Information, and Security Questions.

Association Type

The Association Type provides information about the LEA with which the user is affiliated.

Association Type

* Association Type: ☒ District ☐ School ☐ Private

* County:

* District:

Select the most appropriate association type. Choosing the **District** or **School** radio button will lead to related drop down boxes, which will allow the user to drill down to applicable selections. If the **Private** radio button is selected, the user will have to provide information about the organization they represent.

Association Type

* Association Type: ☐ District ☐ School ☒ Private

* Organization:

* Address:

* City:

* State:

* Zip Code: -

Important Note: The Association Type selected during registration is relevant in the CAS system, but is not used by the eTemplate system.

User Information

User Information provides data about the user and allows the user to create a user name and password.

User Information

* Username:

* First Name:

* Last Name:

* Password:

* Confirm Password:

Primary Telephone

* Area Code:

* Telephone:

Extension:

Secondary Telephone

Area Code:

Telephone:

Extension:

Fax Area Code:

Fax:

* E-mail Address:

* Confirm E-mail:

When completing this section, the system will enforce the following:

- The user name must be unique to the system. (Error message: Username already exists. Select another Username.)
- The fields marked with an asterisk (*) are required.
- Passwords expire every 90 days.
- Cannot reuse any of the user's previous 24 passwords. (Error message: The new password you submitted has been used by you before. Select another password.)
- Passwords **must** have at least 8 characters and **must** contain at least one upper case letter; one lower case letter; and one allowable special character (!@#\$%^&*+=_?). Passwords can also include numbers.
- The format for Telephone and Fax numbers is 555-5555.

Important Notes:

- **Make a note of the user's password.** Support staff for the eTemplate do **not** have visibility to passwords and cannot provide users with that information. If a password is forgotten, the user must go through the Forgot Password process described later in this guide.

- It is strongly recommended that a user's individual email address be used as contact, as opposed to a general department or organization-wide email address.

Security Questions

Security Questions are used to validate the user's identity for password resets. The system requires the user to select two questions from among several choices.

Security Questions

* Security Question Select one... ▼

* Security Answer

* Security Question Select one... ▼

* Security Answer

Important Note: Make a note of security questions and answers; Support staff for the eTemplate do **not** have access to either.

When all sections have been completed, click on the **Submit Registration** button. If the user's registration information is accepted by the system, a confirmation message will display on the screen, and a confirmation email will be sent to the email address provided.

Example screen confirmation:

Centralized Authentication System (CAS)

Confirmation

You have successfully registered.

Name: Beverly Hills

Username: beverlyhills

E-mail: tdow@cde.ca.gov

Primary Telephone: (916)555-5555

Primary Affiliation: Beverly Hills Unified

Security Question One: What is the name of your favorite childhood friend?

Security Question Two: When you were young, what did you want to be when you grew up?

[CARS Logon](#)

[Logon to Centralized Authentication System](#)

[CDE Home](#)

Questions: CARS | conappsupport@cde.ca.gov

Example email confirmation:



Important Notes:

- Register each user only once. Even if the user is associated with multiple LEAs, do not register that user more than once, or create separate user names for each LEA.
- With CAS registration complete, the user has log-in data that can only be used in the eTemplate after the user name has been linked to an LEA. Only the LEA's System Administrator can link a CAS registered user name to their LEA and give access to their eTemplate. The user can be associated with multiple LEAs, using the same user name. The user should contact the System Administrator of each LEA to which the user wants eTemplate access.
- After registering or resetting a password in CAS, the user should wait 5 minutes before attempting to logon to eTemplate. This allows time for the CAS data to be forwarded to the eTemplate database.
- If you are using a browser other than Microsoft Internet Explorer and repeatedly receive a "logon data is invalid" message, close your browser and logon using Microsoft Internet Explorer.

Reminder: CAS is a separate system from the eTemplate. Once registration or changes have been completed in CAS, the user must logon to the eTemplate as a separate action.

Forgot Password

If a password is forgotten, a new password can be created. The user can click on **Forgot Password** in the CAS User Links section of the eTemplate Logon page and be directed to the appropriate CAS page.

Centralized Authentication System (CAS)

Forgot Password

Instructions: All fields are required.

User Information

Username:

E-mail Address:

Security Question:

Security Answer:

[Reset password using information in E-mail.](#)
[Logon to Centralized Authentication System](#)

Questions: CARS | conappsupport@cde.ca.gov

Enter the user's information into the Forgot Password page, being sure that the email address noted matches the email address that the user already has on file in CAS. After clicking on the **Submit** button, the system will advise the user that an email containing information to create a new password will be sent to the address provided.

Centralized Authentication System (CAS)

Forgot Password

An E-mail has been sent to the address provided. It may take a few minutes to receive it. Use that information to create your new password.

[Reset password using information in E-mail.](#)
[Logon to Centralized Authentication System](#)

Questions: CARS | conappsupport@cde.ca.gov

The email sent from CASDoNotReply@cde.ca.gov will contain a Temporary UserID and a Web link, both of which will be needed to reset the password.

Example email:

CDE Centralized Authentication System

CASDoNotReply@cde.ca.gov

You forwarded this message on 4/9/2012 2:27 PM.

Sent: Wed 4/4/2012 8:30 AM

To:

You are in the process of resetting your password for CDE's Centralized Authentication System. Your Temporary UserID is E27632A5-B6A0-4216-A231-167BFB815D26.

Please go to <https://www3.cde.ca.gov/cdeauthentication/resetlogon.aspx?programabbr=CARS>. This Temporary UserID is good for three hours. ~~If the time expires, you will need to go to the Forgot Password link again.~~

To complete the Forgot Password process:

- Copy the Temporary UserID that appears in the email, but do not copy the period at the end.
- Click on the Web link provided in the email, and be directed to the appropriate CAS page.

Centralized Authentication System (CAS)

Instructions: All fields are required.

- Passwords expire every 90 days
- Cannot reuse last 24 passwords
- Passwords must have at least 8 characters including letters, numbers, and special characters (!, @, #, \$, %, ^, &, *, -, +, =, _)
- Passwords must contain at least one uppercase letter, at least one lowercase letter, and at least one special character

Reset Logon

Temporary UserID:

New Password:

Confirm Password:

[CARS Logon](#)
[Forgot Password](#)
[Logon to CAS](#)

Questions: CARS | conappsupport@cde.ca.gov

- Paste the Temporary UserID into the Temporary UserID field that appears on the screen.
- Enter a new password and confirm it, following the password requirements previously mentioned in this guide.
- Click on the **Submit** button, then receive a confirmation.

Centralized Authentication System (CAS)

Your new password has been updated.

[CARS Logon](#)
[Forgot Password](#)
[Logon to CAS](#)

Questions: CARS | conappsupport@cde.ca.gov

Important note: The Temporary UserID is good for only three hours. If you do not complete the process within that timeframe you will have to restart the Forgot Password process.

Reminders:

- **Make a note of the user's new password.** Support staff for the eTemplate do **not** have visibility to passwords and cannot provide users with that information.

- CAS is a separate system from the eTemplate. Once registration or changes have been completed in CAS, the user must logon to the eTemplate as a separate action.
- After registering or resetting a password in CAS, the user should wait 5 minutes before attempting to logon to the eTemplate system. This allows time for the CAS data to be forwarded to the eTemplate database.
- If you are using a browser other than Microsoft Internet Explorer and repeatedly receive a "logon data is invalid" message, close your browser and logon using Microsoft Internet Explorer.



If you typically have the computer "remember" your password, be sure to clear your cache and previously saved passwords before you reset your password.

Update Password and Personal Information

To update password and/or personal information, from the eTemplate Logon page, the user may click on the **Update** link. The user will be directed to the CAS Logon page.

Centralized Authentication System (CAS)

Logon

Username:

Password:

[New User Registration](#)
[Forgot Password](#)
[CARS Logon](#)

[Questions: CARS | conappsupport@cde.ca.gov](#)

The user will need to log-on to CAS with current user name and password, after which the user will be directed to the CAS Main Menu where one of the update options can be selected.

Logged in as: beverlyhills [Logoff](#)

Centralized Authentication System (CAS)

Main Menu

Menu

[Update Password](#)
[Update Personal Information](#)

[Questions: CARS | conappsupport@cde.ca.gov](#)

When updating either a password or personal information, remember to follow the steps from the New User Registration section of this guide, which explains format and field requirements.

Reminders:

- If a password has been updated, make a note of the new password. Support staff for the eTemplate do not have visibility to passwords and cannot provide users with that information. If a password is forgotten, the user must go through the Forgot Password process.
- If you typically have the computer “remember” your password, be sure to clear your cache and previously saved passwords before you reset your password.
- CAS is a separate system from the eTemplate. Once registration or changes have been completed in CAS, the user must logon to the eTemplate as a separate action.
- After registering or resetting a password in CAS, wait 5 minutes before attempting to logon to the eTemplate. This allows time for the CAS data to be forwarded to the LETS database.
- If you are using a browser other than Microsoft Internet Explorer and repeatedly receive a “logon data is invalid” message, close your browser and logon using Microsoft Internet Explorer.

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User Access in the eTemplate

The CDE eTemplate Web page is located at <http://www2.cde.ca.gov/lcap/logon.aspx>. To access the system, the user must have a valid user name and password in CAS and must have been added as a user by the LEA system administrator (system admin).

The eTemplate is intended for authorized users only. Unauthorized access to, or use of this system, or any information therein, is strictly prohibited by CDE policy.

For the complete CDE Web Policy, the user can click on Web Policy displayed at the bottom of every screen, or visit the CDE Web Policy Web page at <http://www.cde.ca.gov/re/di/ws/webpolicy.asp>.

User Access

The eTemplate Logon page allows an authorized user who has been added to the system by a CDE or LEA system admin to logon to the eTemplate. The role(s) assigned to users determines the level of access and functions the user has permission to perform.

Important Note: A user's access and role is LEA specific. The user must work with each LEA to gain access to that LEA's information in the eTemplate.

Logging on to the eTemplate System

The user must logon to the eTemplate before each session. The Web page will automatically prompt for a user name and password.

Local Control and Accountability Plan (LCAP)

Logon

Logon

Username:

Password:

Centralized Authentication System (CAS) User Links: [Update](#) | [New Registration](#) | [Forgot Password](#)

NOTICE: You must be a registered user in the State of California Department of Education (CDE)'s Centralized Authentication System (CAS) to logon. Use the links above to create a new registration or update your existing registration to proceed.

Questions: [Local Agency Systems Support Office](#) | etemplate@cde.ca.gov | 916-319-0809

Upon successful logon, a user associated with a single LEA will see the LCAP(s) associated with their LEA. If the user is associated with multiple LEAs, the user will see the LCAP(s) for all the LEAs with which they are associated.

If You Forgot Your Password

If a password is forgotten, from the eTemplate logon screen, click on the “Forgot password” link then follow the instructions provided in the CAS ‘Forgot Password’ section of this document.

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Navigating the eTemplate

The eTemplate is an online system. Except during site maintenance, the system is up and available to users at all times.

The eTemplate navigation uses links to open specific items. The browser forward and back arrows are supported in the eTemplate, however they are not recommended for use during data entry.

Important Note: The system will automatically log the user off after one hour of inactivity.

Header

The Header displays on all screens and includes general information about the LEA, including: the LEA's full name, the menu the user is currently in, and the active user name.

Header
Logoff

Local Control and Accountability Plan (LCAP)

Main Menu

Active User:

To exit the system, click on **Logoff**, and the system will return to the Logoff screen.

Main Menu

The Main Menu is the landing screen after log on. The Main Menu lists the LCAPs that the user has approval to view, edit, submit, or review.

Menu

Display LCAP	Status	Edit	Delete	Submission	Review
County Office of Education 2015-16	Submitted for Approval James Doe 06/28/2015	Edit	Delete	Submitted on 06/28/2015	N/A
County Office of Education 2016-17	Draft Jane Doe 06/30/2015	Edit	Delete	Submit for Approval	N/A
Elementary 2015-16	Draft John Doe 04/27/2015	Edit	Delete	Submit for Approval	N/A

New Draft

User Role Management

User Role Management

The **User Role Management** link allows the system admin to manage user access to the eTemplate. The **User Role Management** link is only available to users who have the role of system admin.

Adding a User

Prior to being given access to eTemplate, the user must first be registered in CAS. The system admin must be advised of the exact user name that the user created in CAS, and, if the user is an existing user in the eTemplate system, i.e. the user has previously been added as a user in the eTemplate system.

To add a new user, the system admin must first click on the **User Role Management** link and select the applicable LEA using the **Select Entity** drop-down menu.

User Role Management

Select Entity: Select ▼

[Main Menu](#)

The eTemplate will load the LEA user management matrix.

Select Entity: County Office of Education ▼

User	LEA	COE Reviewer for District	COE Read Only	COE Editor	COE Submitter	COE System Admin
COE Editor	County Office of Education	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COE ReadOnly	County Office of Education	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COE ReviewerForDistrict	County Office of Education	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COE Submitter	County Office of Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Save Changes to Grid
Cancel

Add User

[Main Menu](#)

The system admin must click on the **Add User** button to open the Add User feature and then indicate if they want to assign an existing user to the LEA or if they want to add a user that does not currently exist in the eTemplate system. A user is an existing user if they have previously been added as a user in the eTemplate system.

Save Changes to Grid
Cancel

Add User

☐ Assign existing user to County Office of Education
☐ Add a new user (does not exist in LCAP)

Save User
Cancel

[Main Menu](#)

Selecting the option to assign an existing user to the LEA will bring up the **Select Existing User** drop-down menu. Select the user from the list of existing users and click the **Save User** button. If the user appears in the LEA user management matrix, then the user was successfully added to the LEA.

Add User

☒ Assign existing user to County Office of Education
 ☐ Add a new user (does not exist in LCAP)

Select Existing User: Select

[Main Menu](#)

Selecting the option to add a user that does not currently exist in the eTemplate system will bring up the **New User Name** dialogue box. The system admin must enter the exact user name that the user created in CAS and click the **Save User** button. If the user appears in the LEA user management matrix then the user was successfully added to the LEA.

Add User

☐ Assign existing user to County Office of Education
 ☒ Add a new user (does not exist in LCAP)

New User Name:

[Main Menu](#)

Assigning User Roles and Permission

User roles and system access levels are set according to the CDE specifications. The assigned role determines what functions the user has permission to perform.

A role is a name given to a set of permissions. Permissions are a set of related tasks or functional areas within the system that the user is permitted to perform or view. A user may be assigned one or more roles.

Role	Definition	Permissions
Read Only	A user who has the ability to view, but not edit, an LCAP.	The ability to view an LCAP as it currently exists in the eTemplate system in the SBE approved template format.
Editor	A user who has the ability to enter and save draft data in an LCAP and the ability to create a new LCAP draft.	The ability to add, edit, and save draft data to the LCAP.
Submitter	A user who is responsible for submitting the LCAP for review and approval.	The ability to submit an LCAP for review and approval.
System Admin	A user who is responsible for managing LEA user access and roles in the system.	The ability to access User Role Management to add users to the system and to assign or edit user roles.
Reviewer	A user who is responsible for the review and approval of an LCAP.	The ability to review and approve an adopted LCAP. This role is available for COEs and charter schools only; it is not available to school districts.

To assign a user to a role, place a check mark in the appropriate role box in the LEA user management matrix and click the **Save Changes to Grid** button. Conversely, a user may be removed from a role by unchecking the appropriate role box in the user management matrix, then clicking the **Save Changes to Grid** button. A user may have more than one role in the eTemplate system.

Important Note: No additional roles should be assigned to CDE program staff other than read only. If additional roles are assigned to CDE program staff, the LCAP eTemplate Support Team will remove the roles without notice to the LEA.

A Note about Reviewers: For a COE or charter school to review and approve an LCAP submitted in the eTemplate system, they must have a user assigned to the role of reviewer for their districts or school. The COE reviewer role cannot be assigned by a school district; it must be assigned by the COE. A school district wishing to submit its LCAP to its COE for review and approval should contact its COE to discuss this option. A charter school assigns its own reviewer. While not required, it is suggested that the charter school administrator serve as the reviewer/approver for the charter school LCAP.

Removing a User

There is currently not a way to remove a user from an LEA, however, a user may be inactivated. To inactivate a user, uncheck all the role boxes in the user management matrix, then click the **Save Changes to Grid** button.

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Conclusion

Once one or more users have been added to the LEA and assigned the appropriate user roles a draft LCAP may be created. Part II of the eTemplate user guide will discuss this process, including each menu item and how to interact with them.

For specific questions or problems related to the system, additional help is available from staff. Support may be requested by:

- Emailing eTemplate@cde.ca.gov
- Calling the Local Agency Systems Support Office at 916-319-0809.