USER ACCOUNT MAINTENANCE: HOME CARE SERVICES BUREAU (HCSB)

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Introduction

The California Department of Social Services (CDSS), Care Provider Management Bureau (CPMB) has implemented a new background data system called *Guardian*. *Guardian* is a new electronic data system, designed to streamline the background check process for Home Care applicants, aides, agencies (Home Care Organizations), and Community Care Licensing staff. *Guardian* will provide a fast and efficient process to complete background checks. Guardian offers an online payment capability for Home Care Aide Registry applicants and renewals. Users of Guardian will be able to upload documents electronically, check their exemption status and receive communications through their respective portals.

The following document is a user guide to assist the Home Care Service Bureau (HCSB) with user account maintenance. Division Administrator accounts have been created for specified staff at HCSB. These Administrator users have the ability to create and manage user accounts for staff on an as needed basis.

For additional technical support, please contact the Guardian Team at guardianloginsupport@dss.ca.gov

Activating Your Guardian Account

Prior to exploring your Division Administrator user role, you must first activate your Guardian account. The Care Provider Management Bureau (CPMB) will create the initial user accounts for specified HCSB staff. Upon account activation, users should receive a New User Notification in the form of an email from guardian-noreply@dss.ca.gov with a link to access their Guardian portal and a temporary password. Your Guardian username is your Department of Social Services (DSS) email address.

1. Select the Guardian link, within your email, to access your Guardian state portal. The link will route you to Guardian's Terms and Conditions page. Select OK to continue to the log in page.

Terms and Conditions This is a U.S. Government System. Your assistance is needed for the protection of our computer systems and data. Please be aware that this computer system is the property of the State of California, Department of Social Services (CDSS) and is only to be accessed and used for official government business by authorized individuals. Unauthorized use of this system is strictly prohibited by CDSS and may also be prohibited by applicable state and/or federal laws. Such use may result in disciplinary action, up to and including termination, and may result in criminal and civil penalties. Users should be aware there is no expectation of privacy in the use of CDSS systems. CDSS has the right to monitor, log and recover all system and network activity with or without notice, including e-mail and all website communications. If monitoring reveals possible evidence of criminal activity, such evidence may be provided to law enforcement personnel. All applicant Personally Identifiable Information is to be used only for purposes of criminal background checks and roster management. Access to this portal should be restricted to individuals who have received a CDSS criminal record clearance or exemption.

Pressing 'OK' and the subsequent use of this system is an agreement to comply with those policies.

OK

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2. Once routed to the login page, enter your username (DSS email) and temporary password. Note: Usernames are not case sensitive. Passwords are case and space sensitive. Take caution when entering your temporary password. Too many incorrect password attempts will lead to a locked user account. If this occurs, please contact guardianloginsupport@dss.ca.gov for assistance.

3. Upon username and password entry, you will be prompted to create a new password and select two security questions to assist with future password assistance.

4. Once complete, Guardian will route you to your home page.

Creating a New User Account

HCSB Division Administrators will be creating user accounts for staff on an as needed basis. (i.e. Support Staff, analysts, etc.) When creating user accounts, Admin users have the ability to designate specific levels of access based on the user's work flow need. The following section will demonstrate how to create a user account for staff and provide clarification on the functions on each role.

1. From the home page, hover over **Admin** on the navigation bar and select **User Accounts.** The Administration: User Accounts screen appears.

2. Select **Add New User**.

3. The User Accounts page will populate. All required fields are marked with a red asterisk (*). Note: The 'Status' field should auto-populate to 'Enabled.' The 'Is Pending' field should auto-populate to 'No.' The 'User Type' drop-down will auto-populate to Division. These do not need to be changed.

4. Utilize the new user's **DSS email address** in the Username text box. Other required information includes the user's First Name, Last Name, Email Address (DSS email) and Phone Number. Note: The Username and Email Address fields must match.

5. In the Role(s) field, each program has four (4) checkboxes which control what a user can see and do in the system. There are two user roles in which you may assign your staff: HCSB Division Basic and HCSB Division Admin.
Note: Do not utilize the CCLD, Ombudsman or TrustLine Division user roles.

a. HCSB Division Basic: Should be utilized for Support Staff. This role provides a user basic, view only capability. To assign support staff, or an individual with these needs a role, select the following:

Role	Selected	Grantable
CCLD Division Admin ⓘ	☐	☐
CCLD Division Basic ⓘ	☐	☐
HCSB Division Admin ⓘ	☐	☐
HCSB Division Basic ⓘ	☑	☐
Ombudsman Division ⓘ	☐	☐
Trustline Division ⓘ	☐	☐
TrustLine Division - Admin ⓘ	☐	☐

b. HCSB Division Admin: Should be utilized for Managers, or staff who may need access to all Admin functions. This role provides editing and roster management capability. To assign staff with this role, select the following:

Role	Selected	Grantable
CCLD Division Admin ⓘ	☐	☐
CCLD Division Basic ⓘ	☐	☐
HCSB Division Admin ⓘ	☑	☐
HCSB Division Basic ⓘ	☐	☐
Ombudsman Division ⓘ	☐	☐
Trustline Division ⓘ	☐	☐
TrustLine Division - Admin ⓘ	☐	☐

Note: By choosing selected only, you provide this user with access to perform all Admin functions except create additional user accounts. To allow this user to create additional user accounts, select both selected and grantable:

Role	Selected	Grantable
CCLD Division Admin ⓘ	☐	☐
CCLD Division Basic ⓘ	☐	☐
HCSB Division Admin ⓘ	☑	☑
HCSB Division Basic ⓘ	☐	☐
Ombudsman Division ⓘ	☐	☐
Trustline Division ⓘ	☐	☐
TrustLine Division - Admin ⓘ	☐	☐

If you would like this user to be able to create both basic and Admin user accounts (same access as the Division Administrator), select all four checkboxes:

Role	Selected	Grantable
CCLD Division Admin ⓘ	☐	☐
CCLD Division Basic ⓘ	☐	☐
HCSB Division Admin ⓘ	☑	☑
HCSB Division Basic ⓘ	☑	☑
Ombudsman Division ⓘ	☐	☐
Trustline Division ⓘ	☐	☐
TrustLine Division - Admin ⓘ	☐	☐

6. Ensure to assign your new user a Division. This is a required field. (i.e. Home Care Services)

7. Select **Save** once complete. The new user will receive a welcome email with a temporary password. The email will be sent from guardian-noreply@dss.ca.gov. Ensure the user checks all junk and spam folders. Note: Be sure to inform the new user of their username. This will not be included in the welcome email.

Disabling a User Account

As staffing changes occur, you may need to disable a user account for an individual who is no longer employed in with the Home Care Services Bureau or no longer needs Guardian access. These changes must be completed by a Division Administrator or an individual with an equivalent Division Administrator user role assigned to them.

1. From the home page, hover over **Admin** on the navigation bar and select **User Accounts.** The Administration: User Accounts screen appears.

2. Search for the individual by entering their First Name, Last Name, Guardian Username or Email address in the appropriate fields. Select **Search** once complete.

3. The user account will populate towards the bottom of the page under User Search Results. Once the account is located, select the **Disable** option under the Actions column.

UserName	Name	Email	Phone	Type	Status	Is Pending	Last Login Date	Actions
ROtest@test.com	Test, RO	ROtest@test.com	200-200-2000	Division	Enabled	No		Edit Disable Add Note Upload Document

1 Total Results

4. A Note box will appear. Input the reason for disabling the account. (i.e. Individual no longer works for division) Select **Save** when complete. The Guardian user will no longer have access to their user account.

Password Mainentance

The following sections will cover password maintenance for your user account and staff user accounts. The following sections will be covered:

- Unlocking (Enabling) a User Account
- Manually Resetting a User's Password
- Resetting Your Password

Unlocking (Enabling) a User Account

If a user (i.e. support staff, analyst, etc.) has been locked out of Guardian due to too many incorrect password attempts, an individual with a Division Administrator Account user role will need to unlock (enable) the user's account. These changes must be completed by a Division Administrator or an individual with an equivalent Division Administrator user role assigned to them.

1. From the home page, hover over **Admin** on the navigation bar and select **User Accounts.** The Administration: User Accounts screen appears.

2. Search for the individual by entering their First Name, Last Name, Guardian Username or Email address in the appropriate fields. Select **Search** once complete.

3. The user account will populate towards the bottom of the page under User Search Results. The Status column will confirm the account has been locked.

4. To unlock the account, select **Enable** under the Actions tab.

5. The user account will then be Enabled and the user will get an email notification notifying them their account has been unlocked.

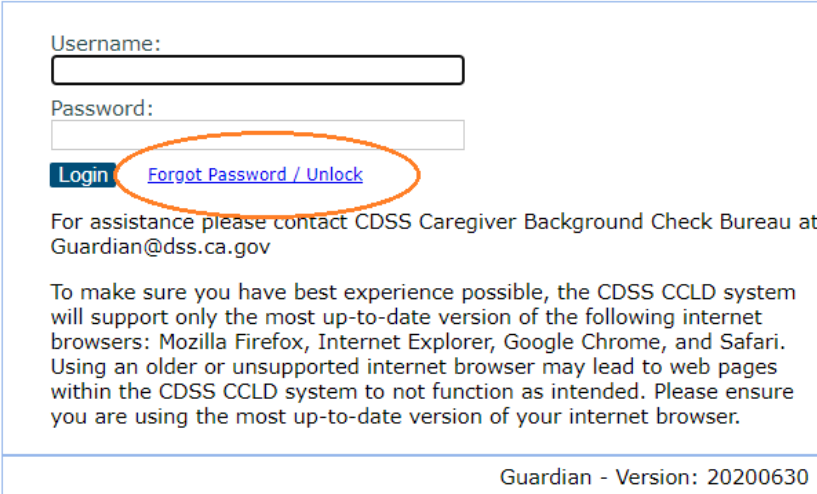6. If the user does not remember their password, they may utilize the self-help password recovery option on the Guardian Login page. They may click **Forgot Password/Unlock** and follow the instructions to reset their password and have a new password sent to them.
    Note: The Forgot Password/Unlock feature is only available to users who have complete their account activation.

Username:

Password:

Login   Forgot Password / Unlock

For assistance please contact CDSS Caregiver Background Check Bureau at Guardian@dss.ca.gov

To make sure you have best experience possible, the CDSS CCLD system will support only the most up-to-date version of the following internet browsers: Mozilla Firefox, Internet Explorer, Google Chrome, and Safari. Using an older or unsupported internet browser may lead to web pages within the CDSS CCLD system to not function as intended. Please ensure you are using the most up-to-date version of your internet browser.

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Manually Resetting a User's Password

If a user (i.e. support staff, analyst, etc.) has been locked out of Guardian due to too many incorrect password attempts and does not recall the answers to their security questions or never completed their account activation, an individual with a Division Administrator Account user role will need to manually reset the password. These changes must be completed by a Division Administrator or an individual with an equivalent Division Administrator user role assigned to them.

1. From the home page, hover over **Admin** on the navigation bar and select **User Accounts.** The Administration: User Accounts screen appears.

2. Search for the individual by entering their First Name, Last Name, Guardian Username or Email address in the appropriate fields. Select **Search** once complete.

3. The user account will populate towards the bottom of the page under User Search Results. The Status column will confirm the account has been locked.

4. Select **Edit**, under the Actions column.

5. The Administration: User Accounts page will populate. Select **Reset Password** at the bottom of the page.

6. The account will be unlocked and the user will receive an email from guardian-noreply@dss.ca.gov with a new temporary password. Upon login, the user will also be able to change their current password.

Resetting Your Password

If you forget your password, you may request a new password. This feature is only available to users who have completed their account activation.

Note: Your username is not case sensitive, but your password is case sensitive. Take caution when entering your password.

1. From the login page, select **Forgot Password/Unlock**:

2. The **Forgot Password** screen will appear. Enter your **username** (DSS email address), then select **Next**.

3. You will be prompted to answer one of your security questions. Then select **Email New Password**. Note: Security questions are not case sensitive.

4. The Login screen appears with the message "Your password has been reset and emailed to <<your email address>>. You will receive a temporary Password and will be prompted to change it when you log into the system." The email will be sent from guardian-noreply@dss.ca.gov. Be sure to check all junk and spam folders.

Note: If you are using cut and paste to insert your system generated password, please ensure you do not include any spaces before or after the password. If you incorrectly enter your password more than three times, you will be locked out of Guardian. If this occurs, please contact the Guardian Maintenance team, at guardianloginsupport@dss.ca.gov