

ONLINE MOU FORM PROCESS

SITES/DEPARTMENTS:

1. To obtain fillable MOU form: Go to https://tracyusd.sharepoint.com/BusinessServices/Insurance_Process_Team_Site/Shared%20Documents or district e-forms <https://staff.tusd.net/sites/eForms/Pages/default.aspx>
2. Fill out your MOU form (Fillable PDF form). Complete the General Information section and have your Principal or Director sign and complete field 1. of the Review Process.
3. Contact the vendor and provide a sample insurance certificate to them if they have not already been approved on the TUSD vendor insurance lists. These can be found on the MOU Team Site: https://tracyusd.sharepoint.com/BusinessServices/Insurance_Process_Team_Site/Shared%20Documents
4. If a room reservation is required for the vendor activity, a Civic Permit must be submitted. List the location and enter the permit number on the form.
5. If the contract includes significant contact with students, fingerprinting may be required. Provide a list of names for clearance to Karina Soto, Personnel Technician in HR, and instruct the vendor to reach out to her to schedule an appointment: ksoto@tusd.net.
6. Email the board agenda packet to the proper Department Secretary as one attachment. The board agenda packet should include the MOU form, board agenda with cover sheet, contract and insurance (if applicable). Please do not scan the packet together as one PDF document. Education Services: jwichman@tusd.net, Business Services: csousa@tusd.net.

MOU sheets can **ONLY** be submitted from the principal, site secretaries or department designees. They will NOT be accepted from teachers or other office staff.

PLEASE SUBMIT 20 DAYS PRIOR TO BOARD MEETING DATE

DISTRICT APPROVAL:

1. Education Services or Business Services Department Secretary receives email of MOU form and supporting documents.
2. Department Secretary will name and upload it to the MOU approval team site in the following format: "08.07.20 MVMS B&G CLUB" (Date of receipt and name of department or site originated from, with the name of the vendor on the end).
3. Department Secretary receives email and confirms receipt of documents and/or communicates necessary changes within (2) two business days.
4. Department Secretary reviews documents, uploads them to the MOU site, and then uploads to the agenda prep file for meeting date requested.
 - a. During the MOU review process, items are not approved in any particular order.

- Approval by Continuous Improvement
- Approval by Business Services
- Approval of Insurance Requirements. Fill in insurance expiration date on MOU form
- Approval by Facility Use/Maintenance & Operations (if civic permits or custodial needed)
- Fingerprint clearance if applicable

5. The day after the board meeting, Secretary gives contracts to Rob for signature. Signed contracts are returned to the site/department or they are notified of any outstanding conditions to be met.


6. Track insurance renewals; mark calendar with insurance reminder dates 1 month prior to expiration date.

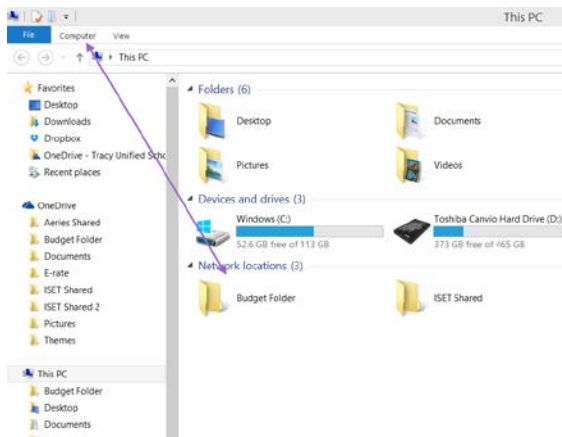
7. Approvers will check site daily in order to be processed timely. **Once your part is approved, please select “edit properties” and put your initials at the end of the title so that everyone will know that your part is complete.**

CREATE “FAVORITE” TAB

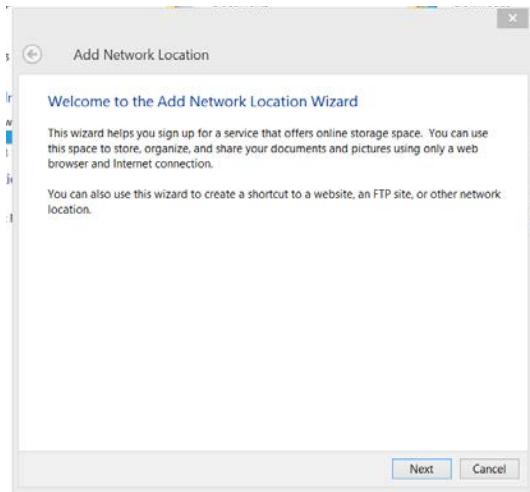
1. Go to home page you want
2. Click on the star (favorites) in top left corner
3. The name will appear as a favorite tab, but to change the name, right click and hit “**rename**”

CREATE NETWORK PLACE- Folder Shortcut on Your Device

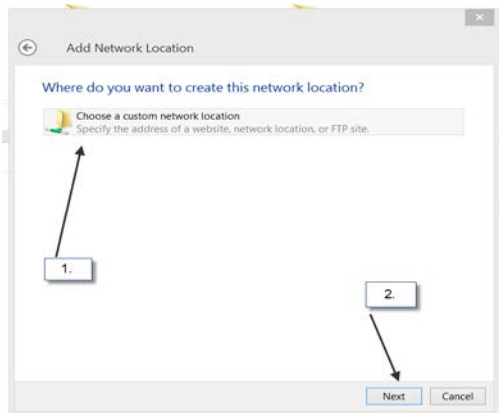
1. On your desktop, click File Explorer. 
2. Click on “**Computer**”, then click “**Add Network Location**”.



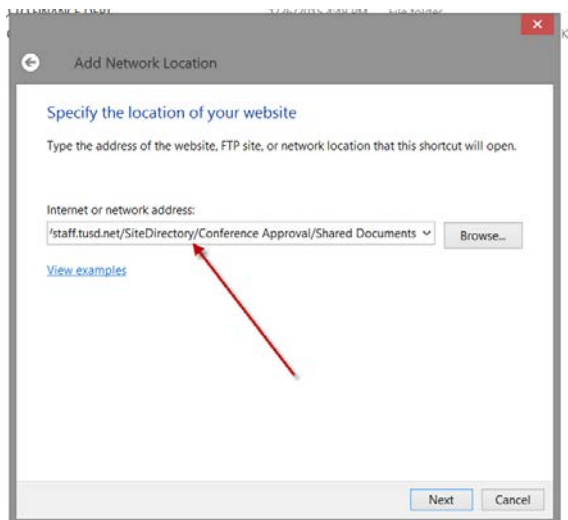
3. From the “**Add Network Location Wizard**” screen, click “**Next**”.



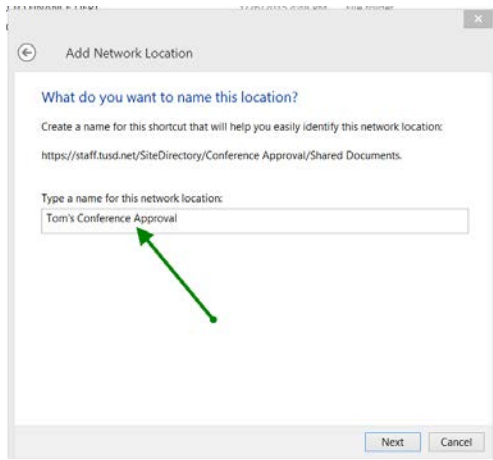
4. From the **“Where do you want to create this network location?”** screen, click **“Choose a custom network location”**, then click **“Next”**.



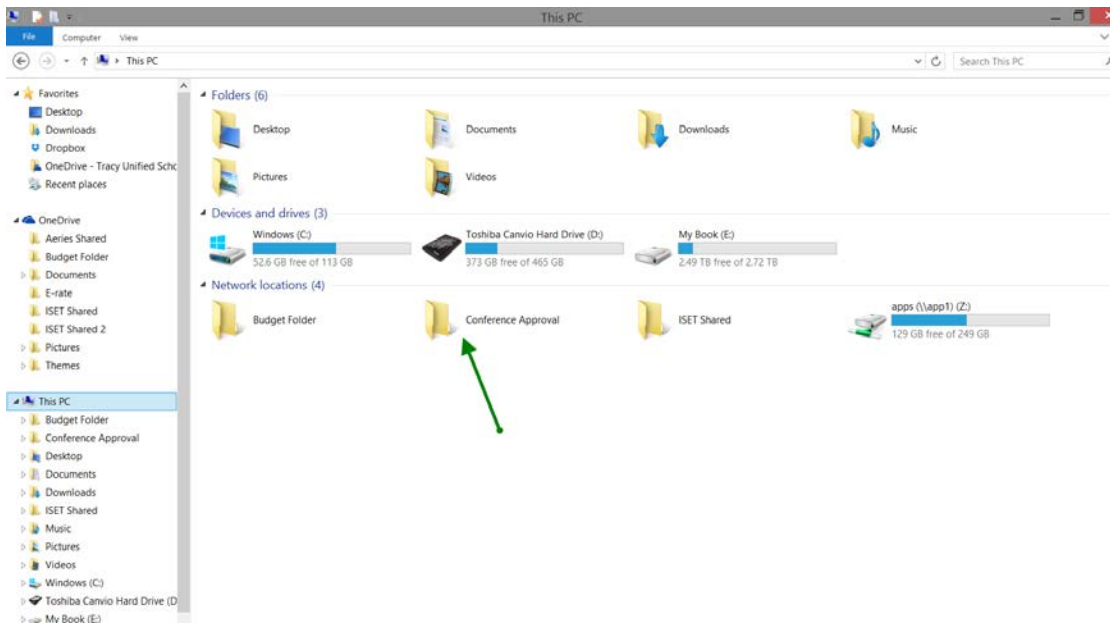
5. Copy and paste this link on the **“Internet of website address”**, then click **“Next”**.
https://staff.tusd.net/sites/Insurance_Process_Team_Site/default.aspx



6. Create a name for your folder shortcut in the **“Type a name for this network location”**. Click **“Next”**.



6. Last step, click **“Finish”**.



A shortcut folder is now created in your device for the MOU Approval Site. Any document saved in your shortcut folder will be synced to the site and vice versa. Instead of going to the staff portal, go to your shortcut and download the Conference Form.