



Upper Lake Unified School District

District Business Office, Michael Kauble – Chief Business Official

InformedK12 Platform

New System for Upper Lake USD

The Upper Lake Unified School District Business Department is happy to announce a shift from our previous electronic timesheet process to the new InformedK12 platform. InformedK12 will not be limited to timesheets, but will also be used for many of the forms currently used by the District.

This document will walk you through some of the forms you will be expected to use in the course of business at ULUSD.

We are also in the process of migrating to a new website. Regardless of what site we use, the forms will be located in two places.

FINDING THE FORMS

A link to all forms can be found in the Business Department section of the website. In addition, a link to that page will be located in the Staff Resources section of the website. This will make it easy to find any form you may need.

TIMESHEETS

Landing Page

When you click on the link to the Time Sheet, you will be routed to a Landing Page (see below). On this page, you will input your name and email address. You will also see what the blank form looks like.

Upper Lake Timesheet

YOUR FULL NAME / SU NOMBRE COMPLETO

Insert your full name

YOUR EMAIL / SU CORREO ELECTRÓNICO

name@ulusd.org

Enter to receive confirmation of submission.

[Go to form / Ir al formulario](#)

DAY	IN	OUT	HOURS WORKED	DESCRIPTION OF TIME WORKED	RATE OF PAY	TOTAL PAY
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						

Once you login, you are taken directly to the form so that you can fill it out. Most fields are self-explanatory, but we will explain some of the boxes that may seem unclear.



Upper Lake Unified School District MONTHLY TIMESHEET

Name:		Email:	
Site:	Select...	OT/OOC:	Select...
Month:	Select...	Year:	Select...

Out time can be no later than 11:59 PM

DAY	IN	OUT	HOURS WORKED	DESCRIPTION OF TIME WORKED	RATE OF PAY	TOTAL PAY
1	00:00 AM	00:00 AM				
2	00:00 AM	00:00 AM				
3	00:00 AM	00:00 AM				
4	00:00 AM	00:00 AM				

Red fields are required, and yellow fields are optional. After you enter your name, email, site, month, and year, you will also see a field marked OT/OOC. This stands for "Overtime (OT)" and "Out of Class (OOT)." There is also an option for both, if both apply.

Overtime is defined as anything over 8 hours in a single day, or over 40 hours in a single week. This applies only to Classified Staff.

Out of Class pay applies when you are asked to work in a job outside of your current class of job. For example, if a school secretary is asked to fill in for a Food Service Cook or similar job, you would mark OOC. If this time is also Overtime, you would select "Both." Both OOC and Overtime are specific to Classified Staff only.

The next step is to enter your time. Please use "am" and "pm" for your time. Hours worked will self-calculate. In the "Description," please describe the work completed. If that day your work is considered "OT" or "OOC," please add this identification after the description so that you are sure to be paid correctly. For example, if you are a school secretary working as a cook, you would use the description "Filling in for cook – OOC."

Please fill out the timesheet using the specific day as listed. If you work on the second, please fill out the line for number two. If you work on the fourth, please fill out line number four.

There is also the option for saving your timesheet for completion later. **Please fill out only one timesheet per month!** This will assist payroll by cutting down on work and entering data more accurately.

Upper Lake Timesheet

Initiated 07/16/2024 6:17am
PDT

Currently on **Step 1: Initiator** of 4

Please fill out the following form and submit it below.

[Attachments](#) [View/Print Blank Form](#) [Save Progress](#)

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Upper Lake Unified School District
MONTHLY TIMESHEET

When you save your progress, you will receive an email with a link that will return you to your partially completed timesheet. This will allow you to easily go back and complete days either as they happen or by doing a few days at a time.

You are required to submit your timesheet by the last day of each month. This allows time for your supervisor to approve your time and get the information to payroll in time to get you paid on schedule. You will find a place at the bottom of Page 2 that contains a box to sign. Click on the box and a unique identifier is created that will be associated with your email address.

FD	RESC	OBJECT	YR	GOAL	FCTIN	LOC	USER	TOTAL

Click to sign here

7/16/2024

Employee Signature
Date

Supervisor Signature
Date

CBO Approval

Payroll Approval

Notes

Finally, after you have signed the Timesheet, click the “Continue” button, and then select your supervisor from the dropdown list. This will initiate the next step in final approval.

Click to sign here

7/16/2024

Employee Signature
Date

Supervisor Signature
Date

CBO Approval

Payroll Approval

Notes

Add Attachments

Choose file(s)

Continue

Approvers

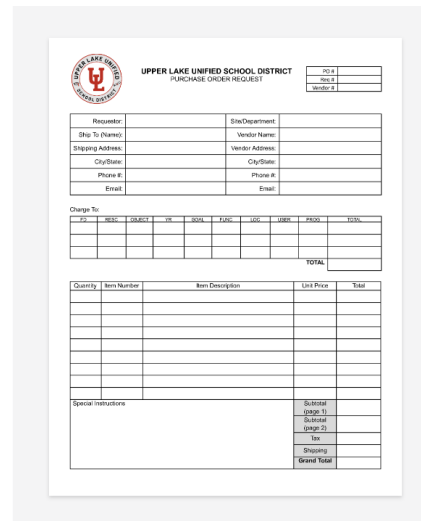
- Assistant Superintendent of Ed Services (swayment@ulusd.org)
- Assistant Superintendent of Pupil Personnel (kgrivette@ulusd.org)
- CBO/Business Office (mkauble@ulusd.org)
- Chief of Human Resources (msmith@ulusd.org)
- Chief of Secondary Education (apetrie@ulusd.org)
- Director of Food Services (emcvey@ulusd.org)
- Director of Special Education (kgrivette@ulusd.org)
- Director of Technology (bking@ulusd.org)
- Director of Transportation (jduarte@ulusd.org)
- Elementary School Principal (swayment@ulusd.org)
- High School/Clover Valley Principal (apetrie@ulusd.org)
- Middle School Principal (msmith@ulusd.org)
- North Shore Collaborative Director (kgrivette@ulusd.org)
- Superintendent (gannous@ulusd.org)

Select recipient...

▼

Send to recipient

Another form that is going electronic is the Purchase Order Request form. Although the Landing Page looks similar, it is specific to this form.



As with the Timesheet, all Red Fields are required to be completed. This means you must have information on the name and address of the vendor, the address of the vendor, vendor email, and the vendor phone number. Having and inputting this information will speed ordering and receiving of your purchases.



UPPER LAKE UNIFIED SCHOOL DISTRICT

PURCHASE ORDER REQUEST

PO #	
Reg #	
Vendor #	

Please attach relevant documents at the bottom of this form

Requestor:	Site/Department: Select...
Ship To (Name):	Vendor Name:
Shipping Address:	Vendor Address:
City/State:	City/State:
Phone #:	Phone #:
Email:	Email:

Page 1 / 2

At least one item must be entered, along with a quantity and a cost per unit. The rest of the line and form will self-populate.

Quantity	Item Number	Item Description	Unit Price	Total
number			number	
number			number	
number			number	
number			number	
number			number	
number			number	
number			number	
number			number	
number			number	
number			number	
Special Instructions			Subtotal (page 1)	
			Subtotal (page 2)	
			Tax	
			Shipping	number
			Grand Total	

Enter shipping. For free shipping, enter 0.

Shipping **must** be entered. If there is no shipping, please enter a zero. Taxes calculate based on the local tax rate of 7.25%.

The back of the form allows for additional items. If you have more items than spaces on the sheet, please complete a second form. This keeps the order process clean and the funding accurate.

On the second page of the form, you will find, again, the signature box. Once you have signed the form, please hit the red continue button. At this stage, you can also attach files for reference by your approver and the Business Department.

(page 2)

Click to sign here

7/16/2024

Requestor

Date

APPROVALS

Supervisor Approval

Date

Chief Business Official Approval

Date

Date Order Placed: _____

Date Complete Order Received: _____

Open PO: _____

Notes

Add Attachments

Continue

Choose file(s)

Once you have hit the “Continue” button, you will be allowed to choose your supervisor and route the document to the correct approver. Once approved, a Purchase Order will be generated.

Approvers

Assistant Superintendent of Ed Services (swayment@ulusd.org)
Assistant Superintendent of Pupil Personnel (kgrivette@ulusd.org)
CBO/Business Office (mkauble@ulusd.org)
Chief of Human Resources (msmith@ulusd.org)
Chief of Secondary Education (apetrie@ulusd.org)
Director of Food Services (emcvey@ulusd.org)
Director of Special Education (kgrivette@ulusd.org)
Director of Technology (bking@ulusd.org)
Director of Transportation (jduarte@ulusd.org)
Elementary School Principal (swayment@ulusd.org)
High School/Clover Valley Principal (apetrie@ulusd.org)
Middle School Principal (msmith@ulusd.org)
North Shore Collaborative Director (kgrivette@ulusd.org)
Superintendent (gannous@ulusd.org)

Select recipient... ▼

Send to recipient

CONFERENCE REQUEST/REIMBURSEMENT FORM

Unlike the other forms, you will see this form twice. Once when you make your request, and once when you return from your conference. It is the same form, just returned to you for completion.

Upper Lake
Conference/Travel
Request/Reimbursement
Form

YOUR FULL NAME / SU NOMBRE COMPLETO

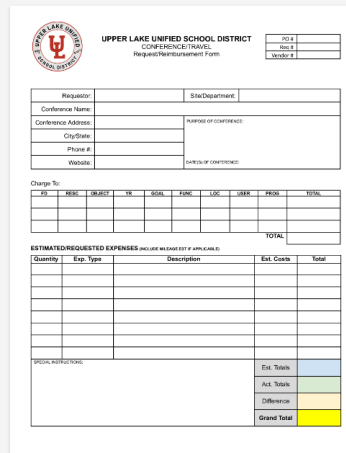
Insert your full name

YOUR EMAIL / SU CORREO ELECTRÓNICO

name@ulusd.org

Enter to receive confirmation of submission.

Go to form / Ir al formulario

A thumbnail image of the 'UPPER LAKE UNIFIED SCHOOL DISTRICT CONFERENCE/TRAVEL Request/Reimbursement Form'. The form includes fields for Requestor, Site/Department, Conference Name, Address, City/State, Phone #, Website, and Date(s) of Conference. It also features a 'Charge To' table with columns for PO, RECD, DEPT, IN, SOAL, FUND, LOC, LIBR, PERM, and TOTAL. Below this is an 'ESTIMATED/REQUESTED EXPENSES' table with columns for Quantity, Exp. Type, Description, Est. Costs, and Total. The form concludes with a summary section for Est. Totals, Act. Totals, Difference, and Grand Total.

The top of the form, as with others, has required information listed in the Red cells. This includes the purpose for the conference. Please be detailed to avoid the form being returned to you for clarification.



UPPER LAKE UNIFIED SCHOOL DISTRICT
CONFERENCE/TRAVEL
Request/Reimbursement Form

PO #	
Req #	
Vendor #	

Requestor:		Site/Department:	Select... ▼
Conference Name:			
Conference Address:		PURPOSE OF CONFERENCE:	
City/State:			
Phone #:	XXX-XXX-XXXX		
Website:			
		DATE(S) OF CONFERENCE:	mm/dd/yyyy to mm/dd/yyyy

On the front of the form, please list all of the **expected** expenses for the conference/trip. Be as accurate as possible. Continued underestimation of expenses can affect your ability to attend future events.

ESTIMATED/REQUESTED EXPENSES (INCLUDE MILEAGE EST IF APPLICABLE)				
Quantity	Exp. Type	Description	Est. Costs	Total
number	Select...		number	
number	Select...		number	
number	Select...		number	
number	Select...		number	
number	Select...		number	
number	Select...		number	
number	Select...		number	
number	Select...		number	
number	Select...		number	
SPECIAL INSTRUCTIONS:			Est. Totals	
			Act. Totals	
			Difference	
			Grand Total	

On Page 2, you are given the ability to attach documents. Some of the documents necessary are:

- Maps (to show mileage)
- An ad or a flyer for the conference showing location and dates
- Receipts for purchases, hotels, meals, etc.

Once you sign the document, you will choose who to route it to.

Approvers

Assistant Superintendent of Ed Services (swayment@ulUSD.org)
 Assistant Superintendent of Pupil Personnel (kgrivette@ulUSD.org)
 CBO/Business Office (mkauble@ulUSD.org)
 Chief of Human Resources (msmith@ulUSD.org)
 Chief of Secondary Education (apetrie@ulUSD.org)
 Director of Food Services (emcvey@ulUSD.org)
 Director of Special Education (kgrivette@ulUSD.org)
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 Middle School Principal (msmith@ulUSD.org)
 North Shore Collaborative Director (kgrivette@ulUSD.org)
 Superintendent (gannous@ulUSD.org)

Select recipient...

Send to recipient

Once approved by your supervisor and the Chief Business Official, a Purchase Order is generated, and then the document is returned to you.

Once the conference has concluded, fill out the **actual** expenses on Page 2, attach any additional documents, sign, and forward to your supervisor for the last time. This will route for approval, and then to purchasing for reimbursement if required.