



Informed K12 Guide for NMCUSD Staff



North Monterey County Unified is going paperless!

- **A link** is all you need to fill out a form online with Informed K12
- **Admin + Admin Assistants will also have accounts** to help approve, track, and manage pending requests

How to initiate a Journal Entry / Budget Transfer on Informed K12

1. **Access your form:** Links to forms can be found on the [district website](#). Enter your name + email, then click "Go to form."

2. **Fill out the form:** Say more about the type of transaction and which budget code you would like to increase or decrease.

- Red fields are required, yellow are optional fill
- Ignore fields that are not fillable; these will be updated at a later step

3. **Save progress as needed:** Click "Save Progress" in the top right corner, if you start a request but aren't ready to submit it yet. You'll get a link to the draft by email, so you can edit and submit at a later date.

4. **Answer the routing question:** Find "Continue" to submit your completed form. Then answer the routing question to determine who the next approver should be.

5. **Understand the approval process:** Behind the scenes, your request will move through a process.

- If it is a Categorical Budget Revision or Journal Entry, an Accountant will approve
- If it is a Budget Revision, then a Budget Analyst will approve
- At the final step, it will be approved by the Fiscal Director

Please select the type of request.

Budget Revision for Categorical Program

Budget Revision for non-Categorical Program

Journal Entry

Journal Entry / Budget Transfer

YOUR FULL NAME / SU NOMBRE COMPLETO

YOUR EMAIL / SU CORREO ELECTRONICO

Enter to receive confirmation of submission.

Go to form / Ir al formulario

Attachments View/Print Blank Form Save Progress

NORTH MONTEREY COUNTY UNIFIED SCHOOL DISTRICT
Journal Entries & Budget or Expenditure Transfers

Instructions:

- Please review Escape reports, for example Fiscal 02 or Fiscal 03, to confirm balances.
- The full Account Code must be entered. Use actual dollars and cents.
- The total of "Increase (+)" must equal the total of "Decrease (-)."
- The "Justification" explanation must be completed.

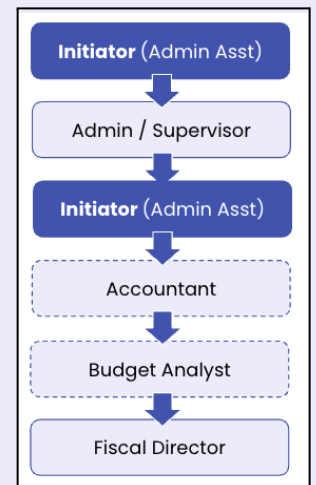
Transfer Type: Select

Note: Transfers can only be processed between same resource.

Name: Full Name Request Date: 1/21/2026

Site / Department: Select

ACCOUNT NUMBER										JUSTIFICATION	INCREASE (+)	DECREASE (-)
Fund (2)	Resource (4)	Y1 (1)	Obj (4)	Function (4)	Subject (4)	Sub Obj (2)	Sub (3)	Local (4)	Mgr (4)			
XX	XXXXX	X	XXXXX	XXXXX	XXXXX	XX	XXXX	XXXXX	XXXXX		number	number
XX	XXXXX	X	XXXXX	XXXXX	XXXXX	XX	XXXX	XXXXX	XXXXX		number	number
XX	XXXXX	X	XXXXX	XXXXX	XXXXX	XX	XXXX	XXXXX	XXXXX		number	number
XX	XXXXX	X	XXXXX	XXXXX	XXXXX	XX	XXXX	XXXXX	XXXXX		number	number



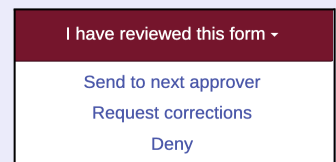
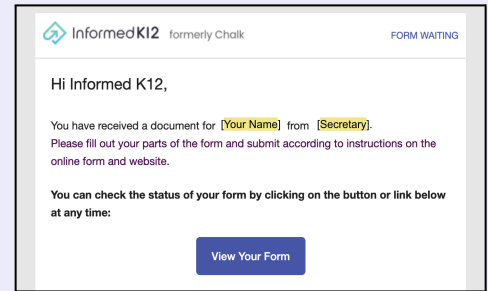
6. **Check your email:** You'll get a copy of your initial request now, then a copy of the completed form later – refer back to this link at any point to check progress!

Questions? Check out our [Help Center](#) or email Support@InformedK12.com

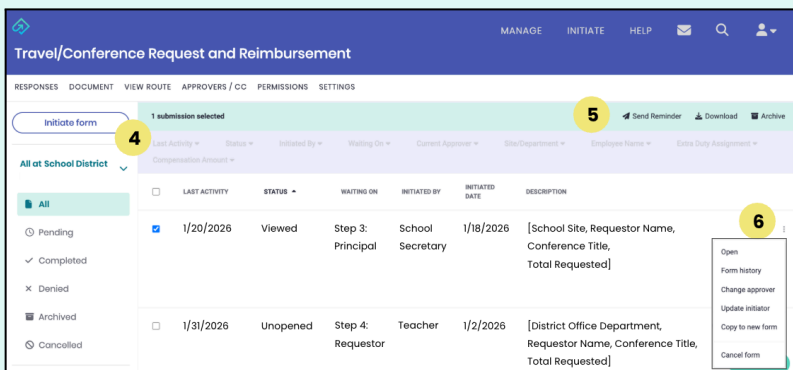
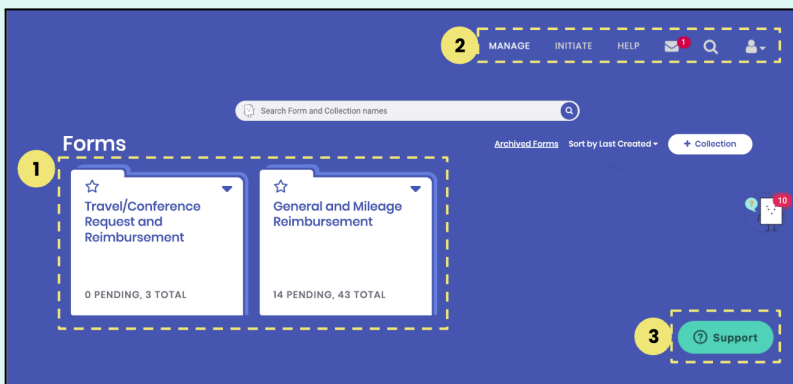


How to approve forms with Informed K12

- Access your form:** You will be notified when a request has been sent to you by email *and* through Informed K12
- Follow the link:** Click "View Your Form" to review and complete your sections
- Take action on the form:** At the bottom of your window, you'll see an option to click "I have reviewed this form"
 - Send to next approver:** If all is in order, send it to next approver and select the person's role/email from a dropdown
 - Request corrections:** If something isn't right, send it back to an earlier initiator/approver with a note about what needs updating
 - Deny:** If the request is not appropriate, you can deny it — this will kill the form, removing it from the approval process altogether
- Check status:** Monitor your form's progress via the Responses page (below)



Navigating within Informed K12's Home Page + Responses Page



- See submissions:** Click a form to see everything you have submitted, approved, or helped manage for a site/dept
- Manage pending requests:** In addition to email notifications, the envelope icon will alert you when a request is waiting on you
- Contact support:** Connect with IK12!
- Initiate form:** Start a new request
- Send reminders, download:** Select a pending submission (or multiple) to send a reminder, and bulk download data as a PDF or CSV
- Cancel or copy forms:** Click to the right of a submission to see an option to view, cancel, or copy the existing request