



Informed K12 Guide for NMCUSD Staff



North Monterey County Unified is going paperless! A [link](#) is all you need to fill out a form

How to submit a Travel/Conference Request for pre-approval

- Access your form:** Links to forms can be found on the [district website](#) – enter your name + email, then click “Go to form.” Pre-approval requests are due at least two weeks ahead of the registration deadline.
- Fill out the form:** Say more about what you are requesting
 - Section A:** Add details about your requested travel: the conference name, the purpose and dates, sub coverage, etc.
 - Section B:** Estimate your expenses, specify if you need pre-payment, attach the conference brochure, and add your signature to confirm
- Save progress as needed:** Click “Save Progress” (top right corner) if you start a request but aren’t ready to submit – you’ll get a link to the draft by email
- Submit to the next approver:** Find “Continue,” select your site/dept from a dropdown + “Send to recipient”
- Check your email:** You’ll get a copy of your initial request now *and* again after your supervisor has approved it – refer back to this link to request reimbursement after travel is complete

Attachments View/Print Blank Form Save Progress

Click here to review AR 3359 Conference and Travel Policy

Travel/Conference Request and Reimbursement GENERATED ON SUBMIT

Complete Sections A and B at least **two weeks prior to registration deadline** to receive pre-approval. Complete Section C within **two weeks** after travel is complete to request reimbursement. (Itemized receipts are required).

A. PRE-APPROVAL: TRAVEL/CONFERENCE DETAILS

Name: Site/Dept:

Employee ID: Request Date: Date(s):

Destination:

Purpose:

Conference/Workshop Name:

B. PRE-APPROVAL: ESTIMATE OF EXPENSES

	Requested	Payment Type
Registration <small>Optional comment</small>	<input type="text"/>	<input type="text"/>
Lodging <small>Optional comment</small>	<input type="text"/>	<input type="text"/>
Other Transportation (via <input type="checkbox"/> plane <input type="checkbox"/> rental <input type="checkbox"/> rideshare/taxi)	<input type="text"/>	<input type="text"/>
Mileage (number, miles at <input type="text"/> <input type="text"/>)	<input type="text"/>	<input type="text"/>
Parking <small>Optional comment</small>	<input type="text"/>	<input type="text"/>
Itemized Projected Meals & Incidentals (complete chart below)	<input type="text"/>	<input type="text"/>
Other Expense <small>Optional comment</small>	<input type="text"/>	<input type="text"/>
Total Estimate	<input type="text"/>	<input type="text"/>

Date: Full Day or Half Day:

1/19/2026

Requesting Employee Date

Are you the employee who is traveling?

Please select next recipient for Admin Assistant (Pre-Approval)

NAME/EMAIL

Select recipient...

How to request a Reimbursement after completing travel

- Access your form:** Within two weeks after completing travel, reopen the same email and click “View Your Form” to submit actual expenses
- Fill out the form:** Complete post-travel details
 - Section C:** Add your actual expenses, including itemized meals
 - Attachments:** Attach itemized receipts for all expenses you incurred, with the exception of meals and mileage
- Send to next approver:** At the bottom of your window, you’ll see an option to click “I have reviewed this form,” then send it to your site or department secretary again
- Check status:** You’ll get an email when your request is approved

InformedK12 formerly Chalk FORM WAITING

Hi Informed K12,

You have received a document for (Your Name) from (Secretary).

Please fill out your parts of the form and submit according to instructions on the online form and website.

You can check the status of your form by clicking on the button or link below at any time:

C. POST-APPROVAL: ACTUAL EXPENSE FOR REIMBURSEMENT

	Expenses	Reimbursable
Registration <small>Optional comment</small>	<input type="text"/>	<input type="text"/>
Lodging <small>Optional comment</small>	<input type="text"/>	<input type="text"/>
Other Transportation (via <input type="checkbox"/> plane <input type="checkbox"/> rental <input type="checkbox"/> rideshare/taxi)	<input type="text"/>	<input type="text"/>
Mileage (number, miles at <input type="text"/> <input type="text"/>)	<input type="text"/>	<input type="text"/>
Parking <small>Optional comment</small>	<input type="text"/>	<input type="text"/>
Meals & Incidentals (include itemized breakdown of meals on page 2)	<input type="text"/>	<input type="text"/>
Other Expense <small>Optional comment</small>	<input type="text"/>	<input type="text"/>
Total Actual Expense	<input type="text"/>	<input type="text"/>

Attachments: I have attached itemized receipts for reimbursement:

Receipts are required for all expenses except Mileage and Meals

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



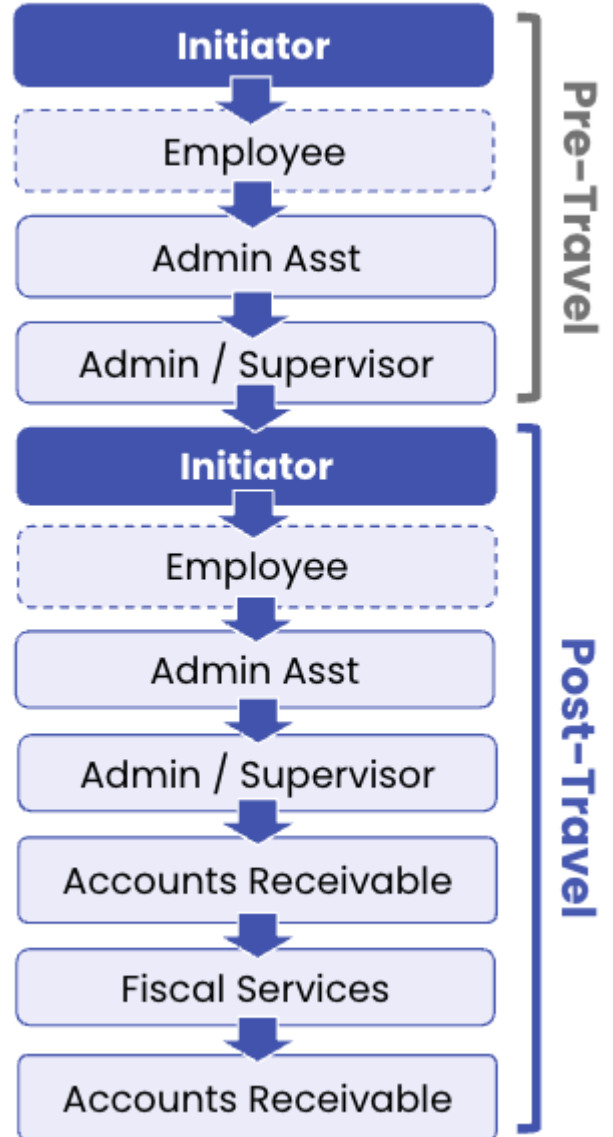
Full workflow, from pre-approval to reimbursement

Pre-Travel:

- Initiated by any District staff
- *If needed: Employee signs*
- Admin Asst reviews, codes, adds to Board agenda
- Administrator pre-approves

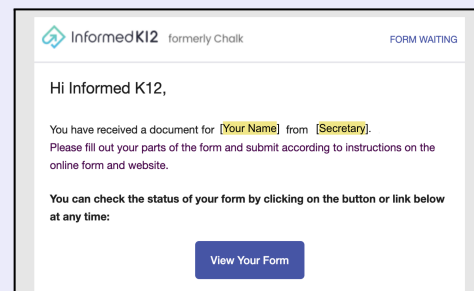
Post-Travel (for reimbursements):

- Resubmitted by the same requestor, with cost actuals
- If needed: Employee signs
- Admin Asst confirms coding
- Administrator approves
- AR approves
- Fiscal Services approves
- Completed by AR

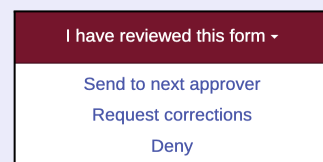


How to approve forms with Informed K12

- 1. Access your form:** You will be notified when a request has been sent to you by email *and* through Informed K12
- 2. Follow the link:** Click “View Your Form” to review and complete your sections
- 3. Take action on the form:** At the bottom of your window, you’ll see an option to click “I have reviewed this form”

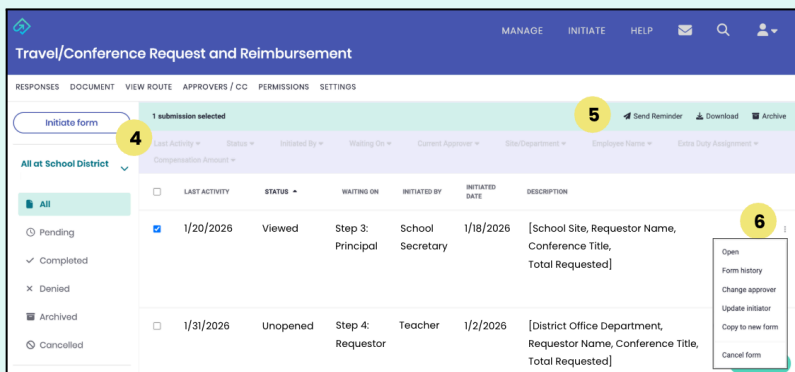
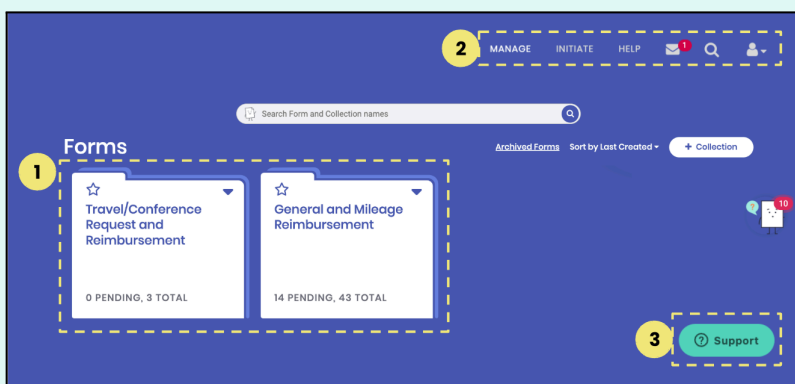


- **Send to next approver:** If all is in order, send it to next approver and select the person’s role/email from a dropdown
- **Request corrections:** If something isn’t right, send it back to an earlier initiator/approver with a note about what needs updating
- **Deny:** If the request is not appropriate, you can deny it — this will kill the form, removing it from the approval process altogether



- 4. Check status:** Monitor your form’s progress via the Responses page (below)

Navigating within Informed K12’s Home Page + Responses Page



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