



Informed K12 Guide for NMCUSD Staff

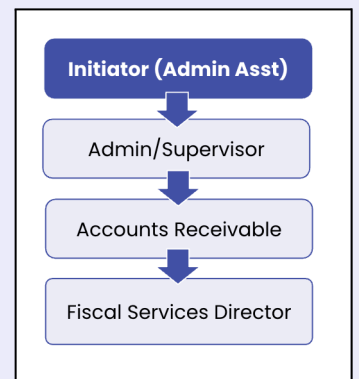


North Monterey County Unified is going paperless!

- **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 Request to Invoice on Informed K12

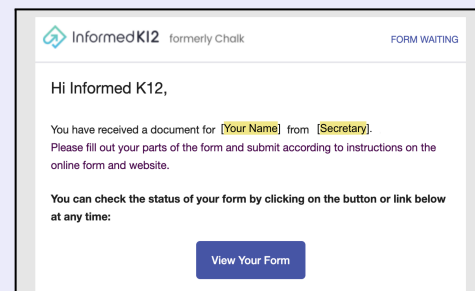
1. **Access your form:** Links to forms can be found on the [district website](#). Enter your name + email, then click “Go to form.”
2. **Fill out the form:** Say more about who you would like to invoice and for what purpose.
 - Red fields are required, yellow are optional fill
 - Ignore fields that 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 select your Admin or Supervisor from the dropdown menu.
5. **Understand the approval process:** Behind the scenes, your request will move through a process.
 - It will be approved by a Manager.
 - Accounts Receivable will review it.
 - At the final step, it will be approved by the Fiscal Director.
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!



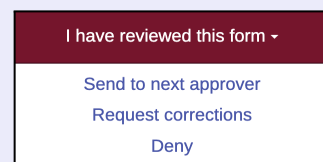
Questions? Check out our [Help Center](#) or email Support@InformedK12.com

How to approve forms with Informed K12

- 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”

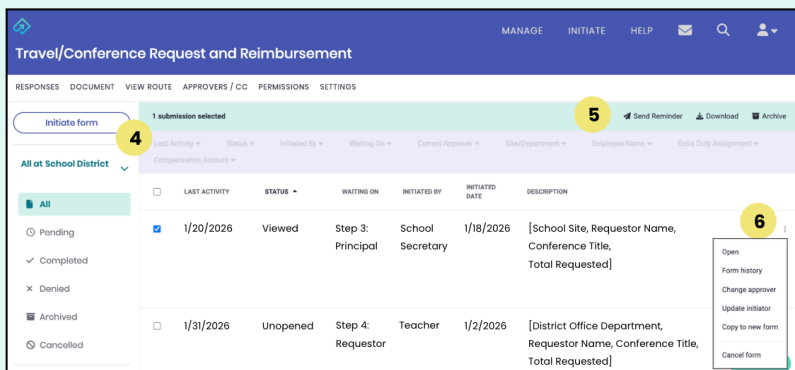
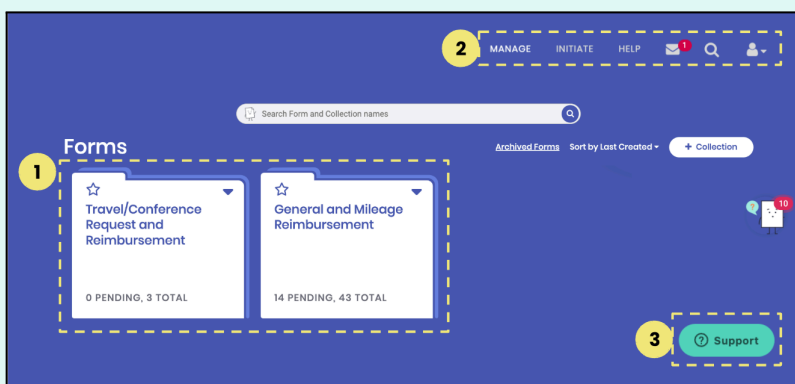


- **Send to next approver:** If all is in order, send it to next approver and select the person’s role/email from a dropdown
- **Request corrections:** If something isn’t right, send it back to an earlier initiator/approver with a note about what needs updating
- **Deny:** If the request is not appropriate, 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