



# Informed K12 Guide for NMCUSD Staff



North Monterey County Unified is going paperless!

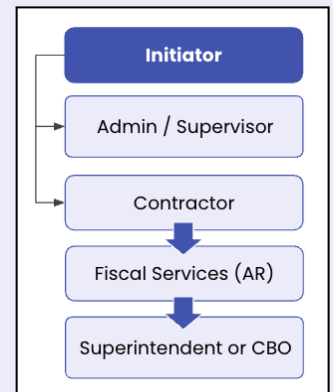
- **A link** is all you need to fill out a form online with Informed K12
- **Admin + Admin Assistants will also have accounts** to help approve, track, and manage pending requests

## How to initiate a Contract Agreement 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 vendor you will be contracting with, the scope of services, and the budget code(s) your Site or Department will use to pay for it.
  - Red fields are required, yellow are optional fill
  - Attach required documents: W-9s, insurance certificates, and other vendor info as relevant
  - Ignore fields that are not fillable; these will be updated at a later ste
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. **Submit to the next approver:** Find "Continue" to submit your completed form. Select your Administrator from a dropdown, then select "Send to recipient."

5. **Understand the approval process:** Behind the scenes, your request will move through an approval process. The vendor will sign it after your Administrator. It will be reviewed by Fiscal. At the final step, it will be approved by the Superintendent or CBO.

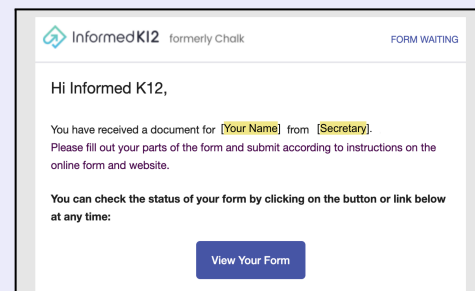


6. **Check your email:** You'll get a copy of your initial request now, then a copy of the completed form later – refer back to this link at any point to check progress!

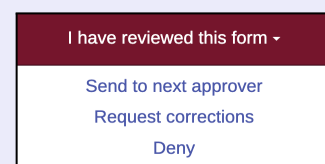
**Questions?** Check out our [Help Center](#) or email [Support@InformedK12.com](mailto:Support@InformedK12.com)

## 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”

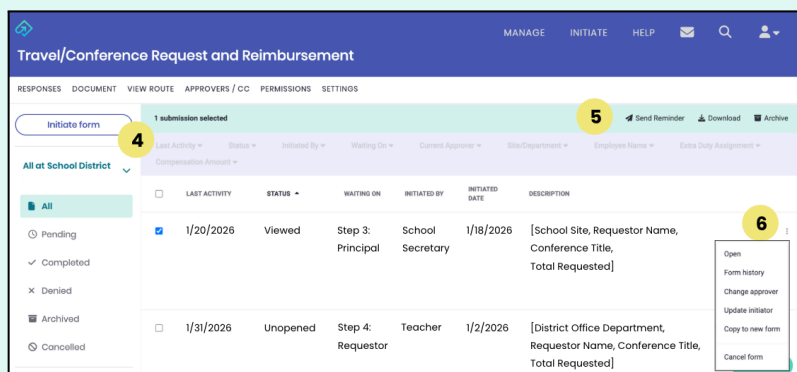
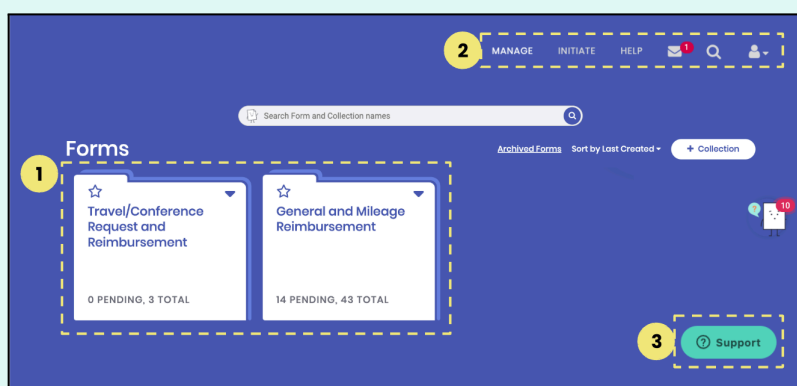


- **Send to next approver:** If all is in order, send it to next approver and select the person’s role/email from a dropdown
- **Request corrections:** If something isn’t right, send it back to an earlier initiator/approver with a note about what needs updating
- **Deny:** If the request is not appropriate,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