

Informed K12 Guide

Española Public Schools | Field Trip Request Form



- **Form Initiators** will access the link to initiate the form from the forms page on the district website..
- **Supervisors and Office Managers will have accounts** to help track, approve and manage pending requests
- **What is included in this guide?**
 - Page 1: How to complete and submit a form for approval with Informed K12
 - [Page 2](#): How to approve forms with Informed K12
 - [Page 3](#): Navigating within Informed K12's Home Page + Responses Page

How to complete and submit a form for approval with Informed K12

1. **Access your form:** Link to initiate the forms can be found on the Forms page on the district website or from your Informed K12 account (app.informedk12.com)
2. **Enter your name + email:** Then click on "Go to form."
3. **Fill out the form:**
 - Red fields are required, yellow are optional fill

 **Key items to remember when filling out the form:**

 - For transportation, if you're requesting a bus or suburban, please be sure to also submit a request in Bus Hive. You'll also need to complete information like where you're requesting transportation from, number of passengers, etc.
 - If sack lunches are needed, you'll be required to confirm how many lunches are needed and any dietary restrictions.
 - Attachments are not required for this form but if you'd like to include any supporting documentation, you can attach a file by scrolling to the bottom of the form and selecting "Choose file(s)" under "Attachments."
4. **Save progress as needed:** Click "Save Progress" in the top right corner, if you start a request but aren't ready to submit it. You'll get a link to the draft by email, so you can edit / submit at a later date.
5. **Submit the form to the next approvers:** Find "Continue" to route the form to the next approvers. You will be prompted to choose your school site office manager from the dropdown menu.
6. **Check your email:**
 - You'll get a copy of your initial request. Refer back to this link at any point to check on its progress!
 - A copy of the completed form later

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.
- **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. **For Office Managers:** Once you’ve approved the form, you’ll need to designate the next few people who will approve/review the form. You’ll see that some steps are optional and some are required. Step 3– Principal, Step 6– Superintendent, and Step 8– Caf Services are all required. You’ll need to select the

correct principal from the dropdown for Step 3, whereas the appropriate approver should automatically be selected for Steps 6 and 8. However, steps 4, 5, and 7 are all optional and will depend on the type of request.

For Step 4– Transportation, this box only needs to be checked if the initiator requested a bus or suburban. If they are taking any other form of transportation, the box can be unchecked. *For Step 5– Program Manager*, you’ll keep this box checked if the field trip is being funded by another department and requires approval from a Program Manager, and you’ll need to select the appropriate Program Manager from the dropdown. If not, this box can be unchecked and this step will be skipped. Similarly for *Step 7– Executive Assistant*, this box can be unchecked if

Next steps/approvers

Enter the necessary approvers and uncheck any steps that aren’t needed. [Learn more](#)

☒	STEP	NAME	EMAIL
☒	Step 3 - Principal (this step is required)	Select Approver...	
☒	Step 4 - Transportation- only select if bus or suburban is needed	Select Approver...	
☒	Step 5 - Program Manager- only select if trip is being paid for by a special program like Title I	Select Approver...	
☒	Step 6 - Superintendent/Designee (this step is required)	Select Approver...	
☒	Step 7 - Executive Assistant- out of state trips only	Select Approver...	
☒	Step 8 - Caf Services (this step is required)	Select Approver...	

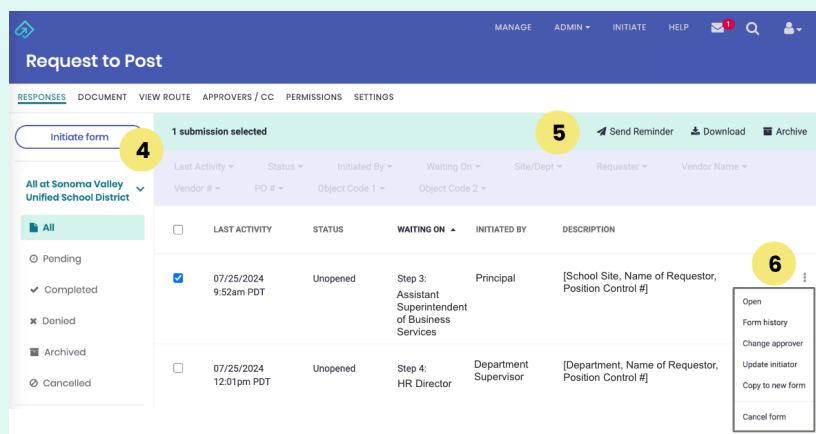
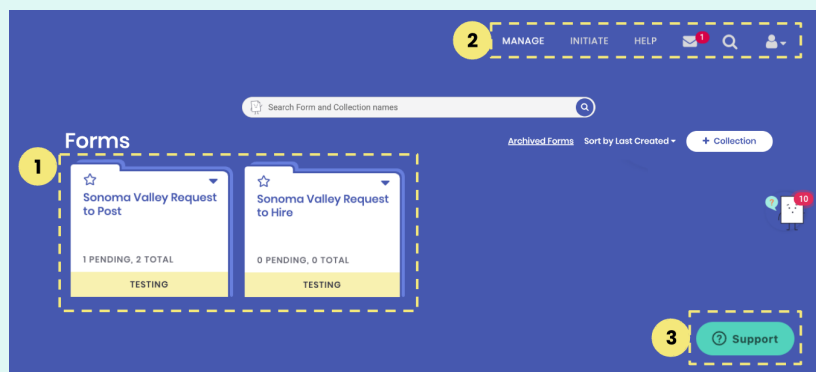
the field trip is not out of state. If the field trip is out of state, you can leave the box checked and the approver should automatically be selected.

Once you’ve delegated these approvers, select **Approve this form**

5. **Check status:** Monitor your form’s progress via the Responses page (see page 3)



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

*Archived folder