

How to Enter Service Requests for Guardians



Related Resources

- Need additional assistance? Please submit a support request, [here](#)
- [Video Guide Link](#)

Important Notes

- The Learning Coach will need to contact the community partners to check for class availability and complete any of their required registration.
- Community Partners must have received a voucher **prior** to providing services to students.
- Services can be requested up to one month in advance
- Monthly services can only be requested for up to two months at a time
- We are unable to backdate service requests.

Creating the Service Request

1. Start by logging into [Vista](#) using a guardian account.
2. On the left side of the screen, click on the **Students** icon.
3. In your list of students, click on the **Student** you wish to place a Service request for.
4. In the top right corner of the screen, click on the **Create Request** button.
5. Using the drop downs, select the following options:
 - a. Select School Year: If this is not the correct year by default, select the dropdown and select the corresponding school year for which the order is being placed.
 - b. Select Order Type: **Service**
 - c. Vendor Selection: **Approved Vendor**
6. Once **Approved Vendor** is selected, a popup will appear asking to select an approved vendor. You can change the dropdown to change your search criteria. Click on the

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vendor to highlight it, then click **Select** to choose the vendor.

Select Vendor

Change dropdown to search by different criteria

Search By
Name

Search Vendor by Name

Vendor Name	Vendor Rating	URL
Product Service Vendor	★★★★★	https://www.test.com
[Test] Product Service Vendor	★★★★★	http://prodserallpaymentop.com
[TEST] Service	★★★★★	http://serviceemail.com
[TEST] Service Vendor for Steph and Kelly	★★★★★	
[TEST] Service Vendor PW	★★★★★	

- a. This will fill in the Vendor Name and Vendor URL fields back in the order request.
7. Confirm the vendor details are correct and click **Next**.
8. If the service you are requesting has already been input by the Community Partner, find it in the list.
9. Check the box on the left hand side to select the class, then change the quantity if necessary.
10. Click **Next**.

Detailed List of Services

0 Items Selected

	Title	Description	Grade Levels	Price	Duration	Quantity
<input type="checkbox"/>	IEW Structure and Style (Level...	The Institute for Excellence i...	Grade 3, Grade 4, Grade 5	\$ 275	Per Semester	1 ▾
<input type="checkbox"/>	IEW Structure and Style (Level...	The Institute for Excellence i...	Grade 3, Grade 4, Grade 5	\$ 275	Per Semester	1 ▾
<input type="checkbox"/>	IEW Structure and Style (Level...	The Institute for Excellence i...	Grade 6, Grade 7, Grade 8	\$ 275	Per Semester	1 ▾
<input type="checkbox"/>	IEW Structure and Style (Level...	The Institute for Excellence i...	Grade 9, Grade 10, Grade 11, G...	\$ 275	Per Semester	1 ▾
<input type="checkbox"/>	Draw Write Now Book Eight: Ani...	Draw Write Now provides studen...	Grade 1, Grade 2, Grade 3, Gra...	\$ 300	Per Semester	1 ▾

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Service Details

11. On the Add Order Items page, select a service from the drop down menu. If selecting **'Not Listed/Custom'** follow steps 9-14, otherwise go directly to step 15.
12. Fill in the **Service** field with the title of the service.
13. If the service has a URL link, provide it in the Service URL field.
14. Enter a service description. It is best to copy the information directly from the Vendor's Detailed List of Services (DLS) visible from the order. Only services on the DLS can be approved.
15. If the Service has material fee's, enter the value here.
16. Service Unit Dates has a dropdown selection. **Please note the maximum duration that can be ordered at one time is 3 months (up to one month in advance)**
 - a. Per Session: Select this option if only a single session on a single date is needed.
 - b. Per Month: Select this option if only a single month is being requested.
 - c. Per Duration: All other requests should use this option. This allows for a range of dates to be selected
17. Please note: 1 Line Item= 1 Service voucher. If your community partner has per hour listed in their DLS, you will need to enter ONE LINE ITEM per hour requested.
18. Enter the **total amount** needed for the service in the unit price field. Example below.
19. Select an **Educational Description** from the drop down menu.

Order Service #1

Item Total: \$175.00

Service

Music Lessons

Service Description

Music Lessons for Piano

Service Unit Dates

Per Month

Unit Price

\$ 150

Month 1

April

2022



Service URL (optional)

<https://www.test.com>

Link

Educational Description

Other

Qty

1

Materials Fee

\$ 25

20. Verify everything is correct and click **Next**.

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Submitting the Order

21. Verify the details of the order and click **Submit**.
22. An Online waiver or affidavit must be signed each year per service community partner. Please read through the document and click to **accept the terms and conditions**.
23. Enter the name on the Vista account and Vista login password into the respective fields below and click **Yes**.

Submit Order Request

Choose Language

English

Are you sure you want to submit order request for approval? Please enter your name and your password to sign the waiver.

inherent in the activity(ies). I acknowledge that I have no questions regarding the intent of this agreement. I have explained this agreement to the student and they understand their responsibilities and obligations. I also understand that this Parental Authorization and Waiver/Release of Liability is valid for the duration of time that my child participates in the current school year and for any and all requests for services and activities.

By Signing Below: (1) I am giving up substantial actual or potential rights in order to allow the student to voluntarily participate in this activity(ies); (2) I have signed this agreement with full appreciation and understanding of the risks inherent in the activity(ies); (3) I have explained this agreement to the student, who understands his/her/their obligations hereunder.

Accept Terms and Conditions of Waiver

Parent or Guardian Electronic Signature (Full Name)

Required

Re-enter your Vista Ordering System Password for Verification Purposes

No

Yes

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- a. If you have forgotten your password please follow the steps on [our changing password guide](#) to reset your password

Accept Terms and Conditions of Waiver

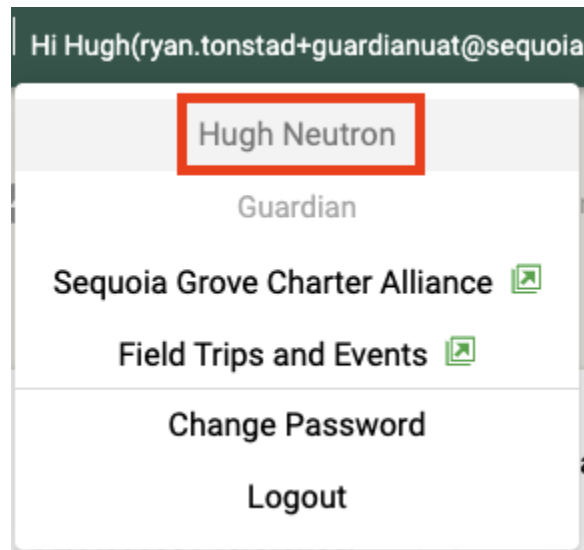
Parent or Guardian Electronic Signature (Full Name)

Hugh Neutron

Re-enter your Vista Ordering System Password for Verification Purposes

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- b. You can find your name by clicking on your email in the top right corner.



24. Once your order has been completed, your HST will review and approve it and then it will be ready for processing.