

Steps to CREATE a Conference Request or Personal Expense Statement:

1. Navigate to the CUSD Accounting Department Home page located at: <http://www.cusd.com/accounting/>
2. Click on the appropriate InformedK12 link located on the right side of the page.

Accounting

Welcome!

Contact Information

1450 Herndon Avenue
Clovis, CA 93611
(Corner of Herndon and Sunnyside)
Phone: 559.327.9050
FAX: 559.327.9059
E-FAX 559.327.6153
generalaccounting@cusd.com

LINKS

[Frequently Asked Questions](#)

[Accounting DocuShare](#)

[IRS W-9 Form](#)

InformedK12 links:

[SITES: Conference Attendance Requests](#)

[DEPARTMENTS: Conference Attendance Requests](#)

[Personal Expense Statement](#)

[InformedK12 Conference Instructions](#)



3. Enter in your name and CUSD email address. Click the 'Go to form' button

4. The conference request form will appear. Complete the form with the necessary information. When complete, click the submit form button located at the bottom of the page.

5. Choose a recipient from the Approver 1 drop down list. An email will be sent to the approver selected. The subject and message to be sent is displayed. You may also check the box to receive reply emails.

- Click the Send to this recipient button located at the top right corner. Once submitted, the initiator of the form will receive a confirmation email and the approver will receive an email indicating an approval is waiting for action. Once the request has been approved by all recipients, the initiator will receive a notification email that the request is complete. All notification emails will come from InformedK12 Schools with this email address: forms@informedK12.com

Steps to APPROVE a Travel/Conference Request:

- If you are selected to approve a conference request or expense statement, you will receive a notification email containing a link to the form. Click the link in the notification email to review the request. All approvers have the ability to approve, deny, modify information on the form or send back for corrections.
- Click the 'I have reviewed this form' button located at the bottom of the page. 3 options are available:
 Send to next approver: send to the next approver within the workflow
 Send back for corrections: send the form back to the initiator or previous approver
 Deny: send back to initiator as denied

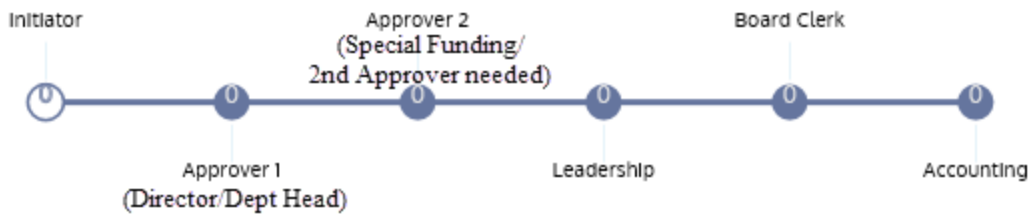
- Each approver in the workflow will receive a notification until the last approver has reviewed the request. The initiator will receive a confirmation email once the request is complete and all approvers have reviewed the form.

WORKFLOW:

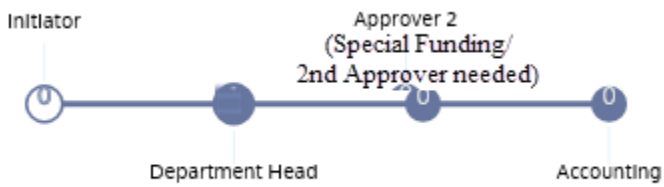
Conference Request – Sites



Conference Request – Departments



Personal Expense



CONTACT INFORMATION

Misty Johnson

mistyjohnson@cusd.com

553.327.9052